

Document Template User Guide



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Introduction

Writing letters can be very time-consuming. From collecting various information to include in the document to writing the same thing over and over, this is time that could be better spent elsewhere. Fortunately, ClaimWizard does this work for you and makes it very easy to automate the generation of letters and forms. Using your own word processor, you can take the documents that your business already uses and, by adding a few basic template codes, quickly create letter and form templates. Once the template is stored in ClaimWizard, it will be available to your organization, saving them time, ensuring consistency, and freeing them up to focus on other matters. What used to take a half-hour or longer, can now be accomplished in just a minute. And since you use your own word processor¹, spreadsheet editor², presentation software³, or PDF document editor, the learning curve is minimal. This document will show you how to create a template for use with ClaimWizard.

¹ Your word processor must be compatible with Microsoft Word 2007 or later. The DOCX format must be used.

² Your spreadsheet editor must be compatible with Microsoft Excel 2007 or later. The XLSX format is required.

³ Your presentation software must be compatible with Microsoft PowerPoint 2007 or later. The PPTX format is required.

Creating the Template Document

ClaimWizard provides a list of template field names that you can insert into your document. These template fields are inserted into your document wherever you want the relevant information to be inserted. For example, the field for a client's name is **client.fullname**. Their mailing address is **client.address**. The full list is available at the end of this document.

To insert a template field into a document, simply type it in your document and surround it with double brackets, **[[and]]**. So, the client's name template field would be listed like this: **[[client.fullname]]**. You can format a template field any way that you like.

Some template fields can be broken down into smaller parts. For example, the client's address contains the full mailing address. The individual parts of that address can also be accessed using template fields such as **[[client.address.street1]]** and **[[client.address.city]]**. Similarly, the **[[client.fullname]]** template field, which contains the full name of the client, can be broken down into small parts like so: **[[client.firstname]]** and **[[client.lastname]]**. You can refer to the template field list at the end of this document to see all of the template fields available.

Here is an example letter featuring the client's name and address, and a salutation.

```
[[client.fullname]]
[[client.address.street1]] [[client.address.street2]]
[[client.address.state]], [[client.address.state]] [[client.address.zip]]

Dear [[client.firstname]],

This letter is to inform you of.....
```

If the client's name is Philip Sherman and his address is 42 Wallaby Way, Suite 101, Sydney, Florida 33587, the generated template would look like this:

```
Philip Sherman
42 Wallaby Way, Suite 101
Sydney, FL 33587

Dear Philip,

This letter is to inform you of.....
```

One important thing to notice is that the actual text in the generated document takes up less space than the fieldnames in the template document. This is important to remember because you will sometimes find that the template fields will wrap onto the next line due to their length. When the data is merged into the document, those lines will automatically be shortened. So you don't need to worry if a long template field name extends onto a second line.

PDF Document Templates

The PDF file format is very popular and ClaimWizard supports this format. There are, however, certain limitations and special requirements that you need to know about.

First, PDF editing is very rudimentary when compared to a true word processing application such as Microsoft Word or Apple Pages. PDF documents are very limited to how they handle dynamic layout features such as word wrap and general positioning. To complicate matters, formatting can vary between PDF viewers.

Another limitation is that the template engine currently supports **PDF forms** only. General text replacement is not supported. The good news is that using the template engine with PDF forms is very easy. While in editing mode of the form, simply click on the form field, examine its properties, and set the **Field Name** property to the correct template field name as described later in this guide.

Yet another limitation with PDF forms is that every single field must have a unique name. If two fields have the same name, they will have the same value **and** formatting. For example, if you have the loss address appear twice, and the first instance of the address is left justified and bold but the second is center justified and italicized, they will both appear as left justified and bold. In other words, every instance of that field uses the same formatting as the first instance. This is part of how PDF documents work and is not controlled by ClaimWizard. To avoid this formatting problem, you can add a number as a field modifier. How this works is described later in this guide.

Finally, to avoid any frustration, you will need Adobe Acrobat Pro (or similar, such as PDF-Xchange Editor) to create forms. A PDF viewer will not enable you to edit forms – only the higher editions of the software.

Adding Templates to Your Account

While we have worked hard to make it as easy as possible to create a document template, it can still be a time-consuming process involving a lot of trial-and-error. To help make the process easier, we have created a template manager that will test the document for you. You can also use this tool to upload your templates, customize how they appear in template lists, and activate/deactivate them. The document template manager can be found in the Admin section.

Field Modifiers

ClaimWizard provides the ability to change a field's value through the use of "modifiers". A modifier is a special code that can change how the value appears in the generated document. For example, converting a value to all upper-case letters or printing a numeric value as a dollar amount.

The next several sections discuss the different modifiers supported by ClaimWizard and how to use them.

Upper/Lower-case Formatting

Several modifiers exist that will let you change the capitalization of a field's value.

Using the field value of "john smith":

Modifier	What it does	Example
capitalize	Capitalizes the first character	[[client.name]:capitalize] = John smith
lowercase	Converts the field's value to all lower-case letters	[[client.name]:lowercase] = john smith
mixedcase	Capitalizes the first letter of each word	[[client.name]:mixedcase] = John Smith
uppercase	Converts the field's value to all upper-case letters	[[client.name]:uppercase] = JOHN SMITH

Empty or Default Values

When a field is empty or does not have a value, a default value can be used instead. This is often useful for inserting placeholders such as "NEED TRACKING NUMBER" that can remind the user to provide a field value.

To specify a default value for a field, use the **empty** modifier, like so:

[[loss.peril]:empty(TYPE OF PERIL)]

If you would like to have a blank line inserted as the empty value, you can do it like this:

[[loss.peril]:empty(_____)]

ClaimWizard also includes a convenient way of adding "fill-in-the-blank" placeholders when a field does not have a value by using the **blank** modifier. For example, if we want the reader to fill in the blank for the cause of loss and the blank should be 20 spaces in length, we use the following:

[[loss.peril]:blank(20)]

So, something like this: "*ensuing loss due to [[loss.peril]:blank(20)]*" will result in

Ensuing loss due to _____.

You can also add text to a document if a field has a non-empty value. For example, adding the phrase “ensuing to” to a sentence when there is a peril specified. This is done using the **notEmpty** modifier, like this:

```
[[loss.peril]:notEmpty(ensuing to)]
```

The **empty** and **notEmpty** modifiers are literal and will display all characters specified in the parenthesis, including spaces. In the example above, if you wanted to have a space before and after the phrase, you would write is as such:

```
[[loss.peril]:notEmpty( ensuing to )]
```

Prepending and Appending Text

It is often desirable to add text before or after a template field if a value is present. For example, an attention line in an address. If a value exists, you may want “ATTN:” to appear before the name of the person or department to be listed. However, if no value is available, you might not want “ATTN:” to be there.

ClaimWizard lets you specify text to add before or after a template field value. This is done using the **prepend** and **append** modifiers.

For the client John Smith, `[[client.attn]:prepend(ATTN)]` becomes **ATTN John Smith**.

For a peril value of “wind”, `[[loss.peril]:append(loss)]` becomes **wind loss**.

This modifier has a special rule that must be followed. When using the colon (:) in text value, the colon character **must** be preceded by a backslash (\). Failure to do this will cause the value to be misinterpreted and truncated. So, to use a colon in the example above, it would be written as:

```
[[client.attn]:prepend( ATTN\: )]
```

The same also applies for right braces: `]` should be written as `\]` if you want it to appear correctly.

Also, the **prepend** and **append** modifiers are literal and will display all characters specified in the parenthesis, including spaces. In the examples above, note that there is a space added before and after the “ATTN:” phrase and the word “loss”.

Date and Time Formatting

ClaimWizard document templates support extra formatting instructions for date and time fields. When special formatting is required, the instructions for the format are included with the template field.

Let’s look at how to format a date using July 4, 2014 as an example. By default, ClaimWizard formats dates using formally. That is, the full month, the day, and the full four-digit year. However, the desired

format for a date might be in 07/04/2014. Written using standard date notation, the format for this date would be **MM/dd/yyyy**. Here “M” indicates the month, “d” the day, and “y” the year. “MM” gives us a two-digit date, “dd” a two-digit day, and “yyyy” a four-digit year. These format codes are listed at the end of this document for your reference.

The code “MMMM” spells out the entire month, while the single “d” gives us a single-digit day. Actually, “dd” pads the day with a zero if needed while “d” does not. Putting these codes together as “MMMM d, yyyy” results in the date being formatted as “July 4, 2014”. Additional codes are available for month abbreviations, days of the week, and more. Also supported are various formatting options for times. Again, these are listed at the end of the document for your reference.

To format a template field, you add an instruction to the template field that tells ClaimWizard what to do. The general structure for a formatted field is this: **[[field.name]:format(pattern)]**. “Pattern” here refers to the formatting characters like “MM” and “dd”. Let’s look at an actual example of how this works using a claim’s date of loss. If the date of loss was 07/04/14 and we wanted it formatted as July 4, 2014, the template field would be written like this:

[[loss.date]:format(MMMM d, yyyy)]

This tells ClaimWizard to retrieve the value of the claim’s date of loss and format it using the pattern “MMMM d, yyyy”. This is actually the default pattern for a date. If this format is desired, it is not necessary to specify a format option.

Time formatting has a special rule that must be followed. When using the colon (:) in a format pattern, the colon character **must** be preceded by a backslash (\). Failure to do this will cause the pattern to be misinterpreted and marked as invalid or cause other unexpected results.

Incidentally, a special template code exists to insert the current date into a document, **[[today]]**.

Date/Time Format Patterns

Using July 4, 2014, 4:30pm (Eastern Daylight Time) as an example

Letter	Date/Time Component	Example
G	Era designator	AD
y	Year (4 digit)	2014
yy	Year (2 digit)	14
yyyy	Year (4 digit)	2014
M	Month in year (1 digit)	7
MM	Month in year (2-digit)	07
MMM	Month in year (3-letter abbreviation)	Jul
MMMM	Month in year (full name)	July
w	Week in year	27
W	Week in month	1
D	Day in year	185

d	Day in month	4
E	Day in week	Fri
EEEE	Day in Week	Friday
a	Am/pm marker	PM
H	Hour in day (0-23)	16
h	Hour in am/pm (0-11)	4
m	Minute in hour	30
s	Second in minute	0
S	Millisecond	0
z	Time zone	EDT
Z	Time zone	-0400

In addition to the format options above, the following format “shortcuts” are available:

Shortcut	Description	Example
short	Simple date formatting	7/4/2014
long	Long date format	July 4, 2014
formal	Full “formal” date format	Friday, July 4, 2014
nth	“nth” date format	4 th
nthof	“nth” date format	4 th of July, 2014
nthdayof	“nth” date format	4 th day of July, 2014
nthlong	“nth” date format	July 4 th , 2014

Language Formatting of Dates

The ability to specify a language to use in date formats is supported by adding the parameter “lang” after the format. The language parameter accepts ISO 639-1 2-digit language codes (e.g. “es” for Spanish, “fr” for French). A full list of codes may be found at http://www.loc.gov/standards/iso639-2/php/English_list.php. When no language code is specified, English will be used.

In order to specify a language, place a semi-colon after the date format and add “lang=” along with the language code.

Example	Value
short;lang=es	4/7/2014
long;lang=es	4 julio 2014
formal;lang=es	lunes de julio de 2014
[[loss.date]:format(d MMMM yyyy;lang=fr)]	14 juillet 2016

Literals in Date Formats

Literal values in dates are supported. A literal value is a set of characters that are ignored by the template engine. It is useful for such things as dates formatted using a foreign language. Simply enclose the literal value in single quotation marks.

Example	Value
<code>[[loss.date]:format(EEEE d 'de' MMMM 'de' yyyy;lang=es)]</code>	lunes 14 de julio de 2016

Date Arithmetic

Sometimes it is desirable to add or subtract a number of days to/from a date. For instance, if you were writing a letter and wanted to indicate a date that was 90 days from today. ClaimWizard allows you to perform simple arithmetic on dates to achieve this. To add a number of days to a field, simply include **+nn** where “nn” is the number of days to add. Likewise, subtracting days is as simple as including **-nn** to the end of the fieldname. Here are some examples to show how this works with the **today** template field. If **today** is July 7, 2014:

Field	Value
<code>[[today]]</code>	July 7, 2014
<code>[[today+90]]</code>	October 25, 2014
<code>[[today-45]]</code>	May 3, 2014

Date arithmetic uses calendar days by default. If you would like business days instead, and the tag with the letter B, like so: `[[today+10B]]`. That will return today’s day plus 10 business days.

Days Since and Until

The **DaysSince** modifier will display the number of days since the date specified in the template field. For example, to display the number of days since the date of loss: `[[loss.date]:DaysSince]`. If the date has not yet occurred, the number will be negative.

The **DaysUntil** modifier will display the number of days until the date specified in the template field. For example, to display the number of days until the claim’s tolling or statute of limitations date: `[[claim.tollingdate]:DaysUntil]`. If the date has already passed, the number will be negative.

NOTE: Some date fields have different default formats. The DaysSince and DaysUntil modifiers expect dates to be in the following format: MM/dd/yyyy. If these modifiers do not produce the desired numeric result and, instead, simply display the actual date, you will need to use a **format** modifier before using the DaysSince/Until modifier. For example, `[[claim.contractdate]:format(MM/dd/yyyy):daysSince]`.

Dates and Microsoft Excel

Microsoft Excel is very opinionated on how dates are displayed and will often override cell formatting settings that you have specified. This can result in a date being displayed as a currency or numeric value. To prevent this, make sure to use a date format modifier when using a date field in Excel.

Number Formatting

By default, numbers are not formatted. That is, they do not include commas as separators. If you would like the number formatted, use the **formatted** modifier, e.g. `[[loss.date]:DaysSince:formatted]`

Currency Formatting

Formatting options exist for working with currency amounts. In addition to the basic **currency** modifier, there are additional modifiers for formatting options.

Modifier	What it does
currency	Formats a numeric field as a currency value. A value of 1234.56 will be displayed as “\$1,234.56” Example: <code>[[settlement.rcv]:currency]</code>
currency.nosign	Like the basic <code>:currency</code> modifiers, formats a numeric field as a currency value but omits the currency symbol (e.g. “\$”)
currency.written	Formats a numeric field as a written currency value. A value of 1234.56 will be displayed as “one thousand two hundred thirty-four dollars and fifty-six cents”. Example: <code>[[settlement.rcv]:currency.written]</code>
currency.written.withoutCents	Formats a numeric field as a whole dollar written currency value. A value of 1234.56 will be displayed as “one thousand two hundred thirty-four dollars”. <code>[[settlement.rcv]:currency.written.withoutCents].</code>
currency.written.withoutZeroCents	Formats a numeric field as a written currency value. If the cents part of the value is zero, it will not be printed. A value of 1234.56 will be displayed as “one thousand two hundred thirty-four dollars and fifty-six cents”. A value of 25.00 will be displayed as “twenty-five dollars”. <code>[[settlement.rcv]:currency.written.withoutZeroCents].</code>

List Formatting

Template fields that result in a list of values are printed in-line with each value separated by a semicolon by default. For example, a list of colors would be displayed as “red; white; blue”. The values can be displayed as a list instead by using the “asList” format option. Using `asList` will result in each value being printed on a separate line, like this:

```
[[colors]:asList]
```

```
Red  
White  
Blue
```

Bullet points may be added to the list, as well.

```
[[colors]:asList(*)]
```

- * Red
- * White
- * Blue

Modifier	What it does
asList	<p>Displays a value as a list. If a character is included in parenthesis, that character will be used as the bullet point</p> <p>Examples: [[client.policyholders]:asList] [[client.policyholders]:asList(*)]</p>

List Delimiters

When a list is displayed on a single line, its items are separated by a delimiter character. By default, the delimiter is a semi-colon. An alternate delimiter may be specified using the **delimit** modifier.

For example, if we want to separate the list of colors with a plus sign (+), the following format would be used: **[[colors]:delimit(+)]**. This would result in “Red+White+Blue”.

The value in the parenthesis may include multiple characters including spaces. If we re-write the previous example with a space before and after the plus sign like this, **[[colors]:delimit(+)]**, the result would be “Red + White + Blue”. This makes the list appear a bit cleaner.

An additional option exists that supports a different separator for the last item in a list. This allows more formal looking lists. The second separator is included with the first one but in its own set of parenthesis. Like the singular separator, multiple characters may be used, including spaces. Using this approach, the example **[[colors]:delimit(, (and))]** will result in “Red, White and Blue”. **[[colors]:delimit(, (&))]** will result in “Red, White & Blue”.

The important thing to remember about using delimiters is that you must include spaces if you want them in the result.

List Indexes

Sometimes, when working with a list of values, only specific items in that list are desired. For example, given a list of colors, we may only want the first two in the list. ClaimWizard includes an option to select a single element in a list using the **nth** modifier.

Using our previous example of a list of colors. “Red; White; Blue”, we would get the following results:

```
[[colors]:nth(1)]   Red
[[colors]:nth(2)]   White
[[colors]:nth(3)]   Blue
```

You can also filter out a specific value in a list with the **NotNth** modifier. This is useful for situations where you might have multiple policyholders and want the first policyholder's name displayed on one line in a template, then the rest of the remaining policyholders on another line. You would accomplish this with the following:

1st entry: `[[policyholder.names]:nth(1)]`

The remaining entries: `[[policyholder.names]:notnth(1)]`

List Scoping

Some fields support the concept of "scoping". Scoping lets you filter the results in the list based on whether the values match a list of other values.

For example, the `[[settlements.total]]` template field supports scoping. There may be many different categories of settlements on a claim: Dwelling, Contents, ALE, Loss of Income. Let's say, however, that you only want to show the total of all settlements that are either categorized as dwelling or contents. Using scoping, the field would be written like this:

```
[[settlements.total?dwelling,contents]
```

Adding "?" at the end of the field denotes that the items listed after the question mark should be used to determine whether or not to use the value or values that will be displayed as the template field's value.

How scoping is used varies among the template fields that support it so attention should be paid to that field's definition described elsewhere in this guide.

Also, it is important to keep in mind that the scope values are literal. Spaces and punctuation are taken into account and must be matched exactly. However, any spaces before or after an item in the list will be ignored. So `[[settlements.total?dwelling,contents]` will be treated the same as `[[settlements.total? dwelling , contents]`

Image Formatting

When using template fields that insert images or photos, the following options are available.

Sizing – Adding a number after the template field name (but within the brackets) will specify the height of the image. The image will then be sized proportionally. The size specified is in pixels, with approximately 150 pixels equaling one inch on paper. Example: `[[property.photo,600]]` will display the featured image for a property and scale it to approximately 4 inches in height.

Miscellaneous Text Formatting

The list below is a summary of Additional formatting options for various types of fields. The format option or modifier is used in the following fashion: `[[field_Name]:MODIFIER]`. See each entry for an example of its use

Modifier	What it does
statename	Displays a state by its full name, rather than its abbreviation. Example: <code>[[loss.address.state]:statename]</code>
nobreaks	Removes line breaks and carriage returns. Useful for forcing multiple paragraphs of text onto a continuous line.
stripped	Removes spaces, dashes, and the following characters from a text value: <code>()*#/\</code>

Conditional Fields

ClaimWizard supports the use of conditional operators that control if and how a field should be displayed. An example of where this might be useful is in a legal document that might want to cite different law statutes depending on which state the property is located. The modifier is named IF and is formatted as:

IF(<operator>, <comparator>, <result if true>, <result if false>)

The <operator> indicates the type of test that will be used. There are four tests available:

- **Equals** – Specifies a result when the template field value is equal to a value.
- **Not Equals** - Specifies a result when the template field value is not equal to a value.
- **In List** - Specifies a result when the template field value exists in a list of values.
- **Not In List** - Specifies a result when the template field value exists not in a list of values.

The <comparator> indicates the value that the template field is being compared to.

The <result if true> is a value that will be displayed if the condition is true. This is optional and, if not present, the template field's value will be used instead.

The <result if false> is an optional field that specifies a value to be displayed if the condition is not met.

For convenience, each operator can be abbreviated using a shortcut instead of spelling out the word, as seen in the table below.

Operator	Shortcut	What it does
Equals	= EQ	The <result if true> value will be used if the <comparator> value is equal to the value of the template field. If no value is provided for <result if true>, the template field's value will be displayed instead. If the values do not match, the <result if false> will be used. If there is no value for <result if false>, the template field value will not be displayed.

Not Equals	!= <> NE !EQ	<p>The <result if true> value will be used if the <comparator> value is not equal to the value of the template field. If no value is provided for <result if true>, the template field’s value will be displayed instead.</p> <p>If the values do not match, the <result if false> will be used. If there is no value for <result if false>, the template field value will not be displayed.</p>
In List	IN	<p>The <result if true> value will be used if the template field value is in a list of values specified by the <comparator> value. If no value is provided for <result if true>, the template field’s value will be displayed instead.</p> <p>If the template field value is not in the list, the <result if false> will be used. If there is no value for <result if false>, the template field value will not be displayed. List values should be separated by semi-colons “;”.</p>
Not In List	!IN NOT IN NOTIN	<p>The <result if true> value will be used if the template field value is not in a list of values specified by the <comparator> value. If no value is provided for <result if true>, the template field’s value will be displayed instead.</p> <p>If the template field value is in the list, the <result if false> will be used. If there is no value for <result if false>, the template field value will not be displayed. List values should be separated by semi-colons “;”.</p>

Important: There is one very important limitation to the condition feature. Only basic text is supported and the text that is returned uses the formatting of the surrounding text or spreadsheet cell. If you need different formatting within the results, you will need to use multiple conditions, each one formatted as needed.

Examples

Let’s see some examples of how conditional fields work. For each of these examples, we have a property located in New Jersey. The template field to refer to the property’s state is *loss.address.state*.

Example 1a: “Equals”

We want to display a properties state only if it is NJ. We would write this as

```
[[loss.address.state]:IF(equals, NJ)]
```

Example 1b: “Equals” with a <result is true> value

We want to display “The Garden State” if the property is in New Jersey. We would write this as

```
[[loss.address.state]:IF(equals, NJ, "The Garden State")]
```

Example 1c: "Equals" with a <result is false> value

We want to display "The Garden State" if the property is in New Jersey but show "your beautiful state" if the property is not in New Jersey. We would write this as

```
[[loss.address.state]:IF(equals, NJ, "The Garden State", "your beautiful state")]
```

Example 2a: "Not Equals"

We want to display the property's state only if it does not equal NJ. We would write this as

```
[[loss.address.state]:IF(not equals, NJ)]
```

Example 2b: "Not Equals" with a <result is true> value

We want to display "Not Texas" if the property is not in the state of Texas. To do this, we use the "not equals" operator. We would write this as:

```
[[loss.address.state]:IF(not equals, TX, "Not Texas")]
```

Example 2a: "Not Equals" with a <result is false> value

We want to display "Not Texas" if the property is not in the state of Texas. To do this, we use the "not equals" operator. The example below would display a value of "The Lone Star State" if the property is in Texas. If the property is not in Texas, the value will be "Not Texas".

```
[[loss.address.state]:IF(not equals, TX, "Not Texas", "The Lone Star State")]
```

Example 3a: "In List"

We want to display "The Original Colonies" if the property's state is one of the original thirteen US colonies.

```
[[loss.address.state]:IF(in list, CT;DE;GA;MA;MD;NC;NH;NJ;NY;PA;RI;SC;VA, "The Original Colonies")]
```

Example 3b: "In List" with a <result is false> value

We want to display "The Original Colonies" if the template field value is in the list and "The United States" if the value is not in the list.

```
[[loss.address.state]:IF(in list, CT;DE;GA;MA;MD;NC;NH;NJ;NY;PA;RI;SC;VA, "The Original Colonies", "The United States")]
```

Example 4: "Not In List"

We want to display specific text if the property address is not in a list of states that make up the New York Metropolitan Area.

```
[[loss.address.state]:IF(not in list, "NJ;NY;CT", "Outside of the NY Metropolitan Area")]
```

Combining Modifiers

Modifiers can be combined to change a field's value in multiple ways. For example, to print the 2nd item in a list of policyholders and format it as all uppercase, you would use

```
[[client.policyholders]:nth(2):uppercase].
```

Distinguishers

Some template fields support the use of a "distinguisher". A distinguisher lets you specify the context or scope of a template value, distinguishing between different ways that a data field can be used in the system. This is best demonstrated with a simple example.

A claim has two appraisal companies associated with it. The first company is working on behalf of the policyholder and is listed in the "Company Personnel" tab of the claim under "External/Outside Personnel". The second appraisal company is representing the carrier and is listed under the insurer's "External/Outside Insurer Personnel" entries.

The "appraiser" series of template fields supports a distinguisher that lets you specify whether the appraiser from the policyholder's list of vendors should be used or if the carrier's appraiser should be used. This is useful in documents where you need to specify the appraiser that is working on behalf of the carrier versus the policyholder.

When specifying a distinguisher, the bang (!) character is added to the field name followed by the value to match against. In the previous example wanting to display the name of the appraisal company working on behalf of the policyholder, the field would be written as

```
[[appraiser.company!policyholder]].
```

 Conversely, the field for the carrier's appraisal company would be written as

```
[[appraiser.company!carrier]].
```

If a distinguisher is not specified on a field that supports it, all possible values will be displayed.

Distinguishers are supported for the following template field series:

- Appraiser
- Attorney
- Estimator
- IndAdj (independent adjuster)

Excel Formulas

Due to how Microsoft Excel handles formulas, spreadsheets have a special requirement in order to make them work correctly. Instead of prefacing a formula with the equals sign (=), you have to start it with the template code `[[equals]]` without a space between `[[equals]]` and the Excel function. If you don't, Excel will reject the template fields that you try to insert.

So, this `=SUM(A1, [[insurance.deductible]])`
becomes this `[[equals]]SUM(A1, [[insurance.deductible]])`

Likewise, `=[[settlement.netAmount]]-[[claim.fee]]`
becomes `[[equals]][[settlement.netAmount]]-[[claim.fee]]`

It's a small change but a very important one.

Licenses, Bonds and Bar Numbers

ClaimWizard helps you keep track of various license and bond numbers for your assignable staff. You can include these numbers into your documents using one of the following field suffixes:

- License
- Bond
- Barnumber

These suffixes are added to the end of the personnel and user series of template fields. For example, if you want to show the license number for the public adjuster assigned to a claim, you would use `[[personnel.adjuster.license]]`. Likewise, for an attorney, their bar number can be included in a document thusly: `[[personnel.attorney.barnumber]]`. If you would like to use the license number of the user generating the document, you can use `[[user.license]]`.

By default, the license will be displayed as just the number. Options exist to have the license preceded or followed by the state in which the license was issued. These options can be activated using a tag modifier of `!stateBefore` and `!stateAfter`. For example, `[[personnel.adjuster.license!stateAfter]]`.

Since a person may have licenses across multiple states, the system will select the one that corresponds to the state in which the loss occurred. If you need a specific state instead, you can use a scoping modifier and specify the two character state abbreviation, like this: `[[personnel.adjuster.license?TX]]`. This will produce the license for the assigned adjuster issued by the state of Texas. You can also have multiple states, separated by commas: `[[personnel.adjuster.license?TX,FL]]`.

Important: If you are using both modifiers and scopes, the modifier must be listed before the scope options! Like this: `[[personnel.adjuster.license!stateAfter?TX,FL]]`.

Support for Circuit Courts and Legal Pleadings

ClaimWizard provides support for including circuit court information into legal pleadings and other related documents. Circuit courts are based on the county that they serve.

Court-related fields include:

- The name of the court (e.g. First, Second)
- The designation of the court (e.g. 1st, 9th)
- The county and state of the court (e.g. Broward, FL)

There are a few qualifiers available in determining which county is used, including:

- The county where the loss occurred. Note: this is the default value used if a qualifier is not specified
- The county where the policyholder is a resident
- The county where the carrier is located

Here is an example commonly found in legal pleadings using the county where the loss occurred to populate the fields:

```
IN THE CIRCUIT COURT OF THE  
[[court.name.ofLoss]] JUDICIAL CIRCUIT IN AND FOR  
[[court.county.ofLoss]] COUNTY, [[court.state.ofLoss]]
```

It is expected to use all uppercase lettering in pleadings so the **:uppercase** format modifier should be used. It is also suggested to have the template field default to an underscored blank value in case the template value is not available. This will help prevent the missing information being overlooked. Taking these suggestions into account, the resulting heading will look like this:

```
IN THE CIRCUIT COURT OF THE  
[[court.name.ofLoss]:uppercase:blank(10)] JUDICIAL CIRCUIT IN AND FOR  
[[court.county.ofLoss]:uppercase:blank(10)] COUNTY, [[court.state.ofLoss]:uppercase:blank(2)]
```

Special Consideration for PDF Form Fields

Some PDF form editors have an important limitation that can cause a lot of frustration when designing a document template. Every single field must have a unique name. If two fields have the same name, they will have the same value **and** formatting. For example, if you have the loss address appear twice, and the first instance of the address is left justified and bold but the second is center justified and italicized, they will both appear as left justified and bold. In other words, every instance of that field uses the same formatting as the first instance. This is part of how PDF documents work and is not controlled by ClaimWizard.

To avoid this formatting problem, you can add a number as a field modifier, like so:

`[[loss.address]:1]` and `[[loss.address]:2]`

This will result in two fields that are uniquely named but ClaimWizard will still populate correctly. The numeric modifiers will be ignored.

Note that you do not have to do this for every field. Only when you want to have multiple fields of the same name but formatted differently.

Unicode Support

Some field modifiers support the use of Unicode characters. This is useful for inserting special characters or “glyphs”. Some useful glyphs include check marks, check boxes, foreign currency symbols, and more. Unicode characters are especially useful when the font that you are using does not have the specific symbol that you want as a standard character.

Unicode characters are represented by using a special notation, starting with `\u` and followed by a 4-letter code. For example, the Unicode character for a check mark, ✓, is `\u2713`.

If the font of the template field does not support Unicode, you may see an alternate or substitute characters instead such as □, ?, or a random letter. You will want to make sure that you test your documents before using them in practice.

There are a couple of important limitations to understand about Unicode characters. The first is that you must use the full code. Simply typing or pasting the finished character will not work. The second is that they are not currently supported in PDF fields. Microsoft Word works fine with them but you will need to make sure that the font you are using supports Unicode. Most current fonts that come pre-installed with Microsoft Office or Windows do. However, many custom fonts do not support Unicode, especially most free fonts found on the Internet. In some cases, Word will fall back to an internal font that supports Unicode but this is not guaranteed and cannot be forced by the template engine.

There are over 1.1 million possible Unicode characters for each and every font that you have installed. Obviously, not all of them will be used and the ones that are available will vary from font to font. While, the list of possibilities is massive and far too large to list, here are a few of the more popular ones:

Symbol	Description	Code
✓	Check mark	<code>\u2713</code>
✓	Check mark - heavy	<code>\u2714</code>
☐	Checkbox – empty	<code>\u2610</code>
☑	Checkbox - checked	<code>\u2611</code>
☒	Checkbox – with X	<code>\u2612</code>

Troubleshooting

Sometimes things don't go as planned. If you enter an invalid template field name or the formatting is incorrect, you may get unexpected results. When this happens, review your original template document and ensure that the fields are entered correctly. If you are certain that a field is correct, but it is not populated, clear the field and re-enter it. Sometimes, when you make a lot of edits to a section of text in a document, some word processors get confused and produce text that ClaimWizard cannot understand. Even if it looks fine to you, it may not be usable behind the scenes. Typically, re-entering the template field fixes this.

If you enter a field name that ClaimWizard does not understand, it will populate the generated document with an error message where the field should be. This will help you to test and correct your document template.

If the document is downloaded but empty or blank, there was an error that prevented the document's generation. Typically, this will be caused by an incorrectly formatted template field or format command.

Appendix B: ClaimWizard Template Fields

Here is the list of all available template fields, arranged alphabetically. Field names are not case-sensitive. If you need data that is not listed below, please contact the ClaimWizard Support Team.

Remember! All template fields should be enclosed in double brackets [[]]

Template Field	Description
Agent.company	The name of the agent company
Agent.name	The full name of the agent or broker contact on the claim
Agent.firstName	The first name of the agent or broker contact on the claim
Agent.lastName	The last name of the agent or broker contact on the claim
Agent.salutation	Formats the agent contact's name for use in a salutation. If an honorific is present, the field will use the honorific and the last name (e.g. Mr. Smith). If the honorific is not present, it will use the first name. Otherwise it will use "Sir/Madam"
Agent.address.line1	The first line of the agent's mailing address, which includes the first and second street values
Agent.address.line2	The second line of the agent's mailing address, which includes the city, state and zip code
Agent.address.street1	The first street value of the agent's mailing address
Agent.address.street2	The second street value of the agent's mailing address, typically a suite or unit number
Agent.address.city	The city of the agent's mailing address
Agent.address.state	The two-lettered state of the agent's mailing address
Agent.address.zip	The postal zip code of the agent's mailing address
Agent.email	The agent contact's email address
Agent.phone	The agent contact's preferred telephone contact. If a phone number has not be indicated as being "preferred", the first available phone number will be returned
Agent.phone.cell	The agent contact's cell phone number
Agent.phone.fax	The agent contact's fax number
Agent.phone.mobile	The agent contact's cell phone number. This is an alias for agent.phone.cell
Agent.phone.home	The agent's home telephone number
Agent.phone.main	The agent's main telephone number
Agent.phone.work	The agent's work phone number
Agent.www	The agent's website address
Appraiser.company	The name of the appraiser company
Appraiser.name	The full name of the appraiser contact on the claim
Appraiser.firstName	The first name of the appraiser contact on the claim
Appraiser.lastName	The last name of the appraiser contact on the claim
Appraiser.salutation	Formats the appraiser contact's name for use in a salutation. If an honorific is present, the field will use the honorific and the last name (e.g. Mr. Smith). If the honorific is not present, it will

	use the first name. Otherwise it will use “Sir/Madam”
Appraiser.address.line1	The first line of the appraiser’s mailing address, which includes the first and second street values
Appraiser.address.line2	The second line of the appraiser’s mailing address, which includes the city, state and zip code
Appraiser.address.street1	The first street value of the appraiser’s mailing address
Appraiser.address.street2	The second street value of the appraiser’s mailing address, typically a suite or unit number
Appraiser.address.city	The city of the appraiser’s mailing address
Appraiser.address.state	The two-lettered state of the appraiser’s mailing address
Appraiser.address.zip	The postal zip code of the appraiser’s mailing address
Appraiser. email	The appraiser contact’s email address
Appraiser.phone	The appraiser contact’s preferred telephone contact. If a phone number has not be indicated as being “preferred”, the first available phone number will be returned
Appraiser.phone.cell	The appraiser contact’s cell phone number
Appraiser.phone.fax	The appraiser contact’s fax number
Appraiser.phone.mobile	The appraiser contact’s cell phone number. This is an alias for appraiser.phone.cell
Appraiser.phone.home	The appraiser’s home telephone number
Appraiser.phone.main	The appraiser’s main telephone number
Appraiser.phone.work	The appraiser’s work phone number
Appraiser. www	The appraiser’s website address
Association.company	The name of the association on the claim
Association.name	The full name of the association contact on the claim
Association.firstName	The first name of the association contact on the claim
Association.lastName	The last name of the association contact on the claim
Association.salutation	Formats the association contact’s name for use in a salutation. If an honorific is present, the field will use the honorific and the last name (e.g. Mr. Smith). If the honorific is not present, it will use the first name. Otherwise it will use “Sir/Madam”
Association.address.line1	The first line of the association’s mailing address, which includes the first and second street values
Association.address.line2	The second line of the association’s mailing address, which includes the city, state and zip code
Association.address.street1	The first street value of the association’s mailing address
Association.address.street2	The second street value of the association’s mailing address, typically a suite or unit number
Association.address.city	The city of the association’s mailing address
Association.address.state	The two-lettered state of the association’s mailing address
Association.address.zip	The postal zip code of the association’s mailing address
Association. email	The association contact’s email address
Association.phone	The association contact’s preferred telephone contact. If a phone number has not be indicated as being “preferred”, the

	first available phone number will be returned
Association.phone.cell	The association contact's cell phone number
Association.phone.fax	The association contact's fax number
Association.phone.mobile	The association contact's cell phone number. This is an alias for association.phone.cell
Association.phone.home	The association's home telephone number
Association.phone.main	The association's main telephone number
Association.phone.work	The association's work phone number
Association. www	The association's website address
Claim.contactDate	The date of initial contact with the policyholder
Claim.contactTime	The time of initial contact with the policyholder
Claim.fee	The company fee on the claim, formatted appropriately.
Claim.fee.plain	The company fee on the claim, unformatted. Note that percentages are displayed as whole numbers (e.g. 20% will be displayed as 20).
Claim.fileId	The file identifier assigned to the claim
Claim.peril	The peril (loss type) of the claim
Claim.contractDate	The date that the claim's contract was signed
Claim.nickname	The nickname or project name for a claim.
Claim.notificationDate	The date that the insurer was notified
Claim.reason	The reason for handling the claim. This is also used to identify the workflow for the claim.
Claim.tollingDate	The tolling date for the claim, if applicable.
claim.totalPayments	The total amount of payments issued by the carrier
Client.fullname	The full name of the client. If the client is business, its organizational name will be used instead
Client.firstname	The first name of the client
Client.lastname	The last name of the client
Client.honorific	The client's title as used in salutations (e.g. Mr., Mrs., Dr.)
Client.salutation	Formats the client's name for use in a salutation. If an honorific is present, the field will use the honorific and the last name (e.g. Mr. Smith). If the honorific is not present, it will use the first name. Otherwise it will use "Sir/Madam"
Client.address	The full mailing address of the client returned as a single line
Client.address.line1	The first line of the client's mailing address, which includes the first and second street values
Client.address.line2	The second line of the client's mailing address, which includes the city, state and zip code
Client.address.street1	The first street value of the client's mailing address
Client.address.street2	The second street value of the client's mailing address, typically a suite or unit number
Client.address.city	The city of the client's mailing address
Client.address.state	The two-lettered state of the client's mailing address

Client.address.zip	The postal zip code of the client's mailing address
Client.attn	The value of the client's attention field
Client.dateAdded	The date that the client was entered into ClaimWizard
Client.email	The client's email address
Client.email2	The client's second email address
Client.phone	The client's preferred telephone contact. If a phone number has not be indicated as being "preferred", the first available phone number will be returned
Client.phone.cell	The client's cell phone number
Client.phone.fax	The client's fax number
Client.phone.home	The client's home telephone number
Client.phone.main	The client's "main" number
Client.phone.mobile	The client's cell phone number. This is an alias for client.phone.cell
Client.phone.work	The client's work phone number
Client.pin	The client's PIN for accessing the ClaimWizard client portal
Client.policyholders	A list of names from the client record of the client and the client contacts that have been marked as being policyholders. Names will be returned as a list delimited by a semi-colon.
Client.contact	The first additional contact listed in the client's record. This is a summary field and will include the contact's name, primary phone number, and email address.
Client.contact.name	The name of the first additional contact listed in the client's record.
Client.contacts	All additional contacts listed in the client's record. This is a summary field and will include the contact's name, primary phone number, and email address.
Client.portal	The full Internet address of your company's client portal. This includes the "https://" part.
Client.www	The client's Internet web address
Company.address	Your company's full address, formatted as a single line
Company.address.line1	The first line of your company's mailing address, which includes the first and second street values
Company.address.line2	The second line of your company's mailing address, which includes the city, state, and zip code
Company.address.street1	The first street value of your company's mailing address
Company.address.street2	The second street value of your company's mailing address
Company.address.city	The city of your company's mailing address
Company.address.state	The two-lettered state of your company's mailing address
Company.address.zip	The postal zip code of your company's mailing address
Company.code	The company code identifier for your company. This is typically used for the customer portal and claim email addresses.
Company.name	Your company's name, as entered in to ClaimWizard
Company.EIN	Your company's employer identification number (EIN)

Company.phone	Your company's primary telephone number
Company.phone2	Your company's secondary telephone number
Company.fax	Your company's fax number
Company.email	Your company's general email address
Company.logo	Your company's logo. See "Sizing Images" for options.
Company.www	Your company's website address
Court.county	See court.county.ofLoss
Court.county.ofCarrier	The county of the circuit court determined by the county where the carrier is located
Court.county.ofClient	The county of the circuit court determined by the county where the primary client resides
Court.county.ofLoss	The county of the circuit court determined by the county where the loss occurred
Court.designation	See court.designation.ofLoss
Court.designation.ofCarrier	The designation of the circuit court determined by the county where the carrier is located (e.g. 5 th)
Court.designation.ofClient	The designation of the circuit court determined by the county where the primary client resides (e.g. 5 th)
Court.designation.ofLoss	The designation of the circuit court determined by the county where the loss occurred (e.g. 5 th)
Court.name	See court.name.ofLoss
Court.name.ofCarrier	The name of the circuit court determined by the county where the carrier is located (e.g. Fifth)
Court.name.ofClient	The name of the circuit court determined by the county where the primary client resides (e.g. Fifth)
Court.name.ofLoss	The name of the circuit court determined by the county where the loss occurred (e.g. Fifth)
Court.state	See court.state.ofLoss
Court.state.ofCarrier	The state of the circuit court determined by the county where the carrier is located
Court.state.ofClient	The state of the circuit court determined by the county where the primary client resides
Court.state.ofLoss	The state of the circuit court determined by the county where the loss occurred
Indadj.company	The name of the independent adjuster company on the claim
Indadj.name	The full name of the independent adjuster contact on the claim
Indadj.firstName	The first name of the independent adjuster contact on the claim
Indadj.lastName	The last name of the independent adjuster contact on the claim
Indadj.salutation	Formats the independent adjuster contact's name for use in a salutation. If an honorific is present, the field will use the honorific and the last name (e.g. Mr. Smith). If the honorific is not present, it will use the first name. Otherwise it will use "Sir/Madam"

Indadj.address.line1	The first line of the independent adjuster's mailing address, which includes the first and second street values
Indadj.address.line2	The second line of the independent adjuster's mailing address, which includes the city, state and zip code
Indadj.address.street1	The first street value of the independent adjuster's mailing address
Indadj.address.street2	The second street value of the independent adjuster's mailing address, typically a suite or unit number
Indadj.address.city	The city of the independent adjuster's mailing address
Indadj.address.state	The two-lettered state of the independent adjuster's mailing address
Indadj.address.zip	The postal zip code of the independent adjuster's mailing address
Indadj. email	The independent adjuster contact's email address
Indadj.phone	The independent adjuster's preferred telephone contact. If a phone number has not be indicated as being "preferred", the first available phone number will be returned
Indadj.phone.cell	The independent adjuster contact's cell phone number
Indadj.phone.fax	The independent adjuster contact's fax number
Indadj.phone.mobile	The independent adjuster contact's cell phone number. This is an alias for indadj.phone.cell
Indadj.phone.home	The independent adjuster contact's home telephone number
Indadj.phone.main	The independent adjuster contact's main telephone number
Indadj.phone.work	The independent adjuster contact's work phone number
Indadj. www	The independent adjuster's website address
Insurance.company	The name of the insurer
Insurance.company.address	The full address of the insurer, formatted as a single line
Insurance.company.address.line1	The first line of the insurer's mailing address, which includes the first and second street values
Insurance.company.address.line2	The second line of the insurer's mailing address, which includes the city, state, and zip code
Insurance.company.address.street1	The first street value of the insurer's mailing address
Insurance.company.address.street2	The second street value of the insurer's mailing address
Insurance.company.address.city	The city of the insurer's mailing address
Insurance.company.address.state	The two-lettered state of the insurer's mailing address
Insurance.company.address.zip	The postal zip code of the insurer's mailing address
insurance.company.attn	The value of the insurer's attention field
Insurance.company.email	The general email address of the insurer
Insurance.company.phone.fax	The insurer's fax number
Insurance.company.phone.main	The insurer's main telephone number
Insurance.company. www	The insurer's website address
Insurance.claimnumber	The insurer-issued claim number
Insurance.claimnumber2	Secondary claim numbers issued by the carrier for tracking of concerns within a single claim

Insurance.policynumber	The policy number of the insurance policy associated with the claim
Insurance.dwelling	The dwelling limit (A) of the policy
Insurance.other	The other structures limit (B) of the policy
Insurance.contents	The contents limit (C) of the policy
Insurance.ale	The Loss of Use/ALE limit (D) of the policy
Insurance.deductible	The policy's deductible
Insurance.policystart	The starting date of effective coverage
Insurance.policyend	The ending date of effective coverage
Insurance.policydates	A formatted date range description of the effective dates of a policy. Accepts date format patters as well as "short" and "long" pattern presets
Insurance.policycategory	The category of the policy (e.g. Residential, Commercial, etc)
Insurance.policytotal	The total policy limits (A + B + C +D)
Insurance.policytotal_addl	The total policy limits plus any additional limits added to the policy
Insurance.policytype	The type of policy, sometimes referred to as the Form Type (e.g. HO-3)
Insurance.totalCoverage	The total coverage amount provided by the policy
Insurance.coverage.settlement	When generating a template for a specific settlement demand, this field will return the policy coverage limit that matches the description of the demand. If a match cannot be found among the standard policy limits, the additional policy details will be searched.
insurance.coverage!<list>	A sum of the coverage types. This field supports the use of a distinguisher (see the section on using distinguishers). Possible values are: A, B, C, D, dwelling, building, structure, contents, lossofuse, ALE, ordinance, debris, mold. Values should be separated by commas. An example for coverages A, C and debris removal looks like this: [[insurance.coverage!A,C,debris]]
Insurance.adjuster.name	The full name of the insurer's assigned adjuster
Insurance.adjuster.firstname	The first name of the insurer's assigned adjuster
Insurance.adjuster.lastname	The last name of the insurer's assigned adjuster
Insurance.adjuster.honorific	The adjuster's title as used in salutations (e.g. Mr., Mrs., Dr.)
Insurance.adjuster.salutation	Formats the adjuster's name for use in a salutation. If an honorific is present, the field will use the honorific and the last name (e.g. Mr. Smith). If the honorific is not present, it will use the first name. Otherwise it will use "Sir/Madam"
Insurance.adjuster.phone	The phone number of the insurer's assigned adjuster
Insurance.adjuster.fax	The fax number of the insurer's assigned adjuster
Insurance.adjuster.address	The full address of the insurer's assigned adjuster, formatted as a single line
Insurance.adjuster.address.line1	The first line of the insurer's assigned adjuster's mailing address, which includes the first and second street values
Insurance.adjuster.address.line2	The second line of the insurer's assigned adjuster's mailing

	address, which includes the city, state, and zip code
Insurance.adjuster.address.street1	The first street value of the insurer's assigned adjuster's mailing address
Insurance.adjuster.address.street2	The second street value of the insurer's assigned adjuster's mailing address
Insurance.adjuster.address.city	The city of the insurer's assigned adjuster's mailing address
Insurance.adjuster.address.state	The two-lettered state of the insurer's assigned adjuster's mailing address
Insurance.adjuster.address.zip	The postal zip code of the insurer's assigned adjuster's mailing address
Insurance.adjuster.email	The email address of the insurer's assigned adjuster
Insurance.adjuster.title	The title of the insurer's assigned adjuster
loss.address	The loss address for the claim, formatted as a single line
loss.address.line1	The first line of the loss address, which includes the first and second street values
loss.address.line2	The second line of the loss address, which includes the city, state and zip code
loss.address.street1	The first street value of the loss address
loss.address.street2	The second street value of the loss address, typically a suite or unit number
loss.address.city	The city of the loss address
loss.address.state	The two-lettered state of the loss address
loss.address.zip	The postal zip code of the loss address
Loss.date	The date of loss
Loss.date.nth	The date of loss formatted as the nTh day of the month. This is typically used in legal-related letters.
Loss.date.month	The month that the date of loss occurred, written in full
Loss.date.year	The 4-digit year that the date of loss occurred.
Loss.date.year2	The 2-digit year that the date of loss occurred.
Loss.description	The description of the loss
Loss.estimated	The estimated loss amount of the claim
Loss.estimatedLessDed	The estimated loss less the overall deductible
Loss.estimatedOutstanding	The estimated loss amount of the claim less any payments issued by the carrier
Loss.estimatedOutstandingLessDed	The estimated loss amount of the claim less any payments issued by the carrier less the policy's primary deductible
Loss.isEmergency	A boolean value to indicate whether the loss is related to a declared state of emergency
Loss.isFEMA	A boolean value to indicate whether the loss is a FEMA claim
Loss.peril	The peril type of the loss
Loss.propertyDescription	A description of the property used on Proofs of Loss to describe the nature of occupancy
Loss.propertyType	The type of property involved in the loss (e.g. residential, commercial)
Loss.propertyValue	The value of the property at the time of loss

loss.relatedTo	The value specified as what the loss was a result of or related to, typically a named hurricane or other event.
Loss.time	The time of the loss in 24-hour/military time format
Loss.time.hour	The hour of the loss in 24-hour/military time format
Loss.time.hour12	The hour of the loss in standard time format
Loss.time.ampm	The AM/PM designation of the time of loss. Note that this field is capitalized. Use the :lowercase modified for “am/pm”
Loss.time.ap	The AM/PM designation of the time of loss written as “a” or “p”. Note that this field is capitalized. Use the :lowercase modified for “a/p”
Mediator.company	The name of the mediator company
Mediator.name	The full name of the mediator contact on the claim
Mediator.firstName	The first name of the mediator contact on the claim
Mediator.lastName	The last name of the mediator contact on the claim
Mediator.salutation	Formats the mediator contact’s name for use in a salutation. If an honorific is present, the field will use the honorific and the last name (e.g. Mr. Smith). If the honorific is not present, it will use the first name. Otherwise it will use “Sir/Madam”
Mediator.address.line1	The first line of the mediator’s mailing address, which includes the first and second street values
Mediator.address.line2	The second line of the mediator’s mailing address, which includes the city, state and zip code
Mediator.address.street1	The first street value of the mediator’s mailing address
Mediator.address.street2	The second street value of the mediator’s mailing address, typically a suite or unit number
Mediator.address.city	The city of the mediator’s mailing address
Mediator.address.state	The two-lettered state of the mediator’s mailing address
Mediator.address.zip	The postal zip code of the mediator’s mailing address
Mediator. email	The mediator contact’s email address
Mediator.phone	The mediator contact’s preferred telephone contact. If a phone number has not be indicated as being “preferred”, the first available phone number will be returned
Mediator.phone.cell	The mediator contact’s cell phone number
Mediator.phone.fax	The mediator contact’s fax number
Mediator.phone.mobile	The mediator contact’s cell phone number. This is an alias for mediator.phone.cell
Mediator.phone.home	The mediator’s home telephone number
Mediator.phone.main	The mediator’s main telephone number
Mediator.phone.work	The mediator’s work phone number
Mediator. www	The mediator’s website address
Mortgages	A listing of mortgage companies and loan numbers on the claim
Mortgage.company	A list of mortgage companies on the claim
Mortgage.company.address	The full addresses of the mortgage companies on the claim,

	formatted as a single line
Mortgage.company.address.line1	The first line of the addresses of the mortgage companies on the claim, which includes first and second street values
Mortgage.company.address.line2	The second line of the addresses of the mortgage companies on the claim, which includes city, state and zip code values
Mortgage.company.address.street1	The first street value of the mortgage companies on the claim
Mortgage.company.address.street2	The second street value of the mortgage companies on the claim
Mortgage.company.address.city	The city of the mortgage companies on the claim
Mortgage.company.address.state	The two-lettered state of the mortgage companies on the claim
Mortgage.company.address.zip	The postal zip code of the mortgage companies on the claim
Mortgage.company.attn	The value of the mortgage companies' attention field
Mortgage.company.email	The email addresses of the mortgage companies on the claim
Mortgage.company.phone	The primary phone number of the mortgage company.
Mortgage.company.phone.main	The mortgage company's phone number that is labeled "Main"
Mortgage.company.phone.fax	The mortgage company's fax number.
Mortgage.company. www	The mortgage company's website address
Mortgage.accountnumber	The account number for the mortgage if different than the loan number
Mortgage.loannumber	The loan number for the mortgage
Personnel.adjuster.commission	The commission rate of the company adjuster assigned to the claim
Personnel.adjuster.email	The email address of the company adjuster assigned to the claim
Personnel.adjuster.firstName	The first name of the company adjuster assigned to the claim
Personnel.adjuster.lastName	The last name of the company adjuster assigned to the claim
Personnel.adjuster.honorific	The honorific (e.g. Mr., Mrs., Dr.) of the company adjuster assigned to the claim
Personnel.adjuster.initials	The initials of the company adjuster assigned to the claim
Personnel.adjuster.name	The name of the company adjuster assigned to the claim
Personnel.adjuster.nameInf	The name of the company adjuster assigned to the claim formatted as "last name, first name"
Personnel.adjuster.phone	The phone number of the company adjuster assigned to the claim
Personnel.adjuster.salutation	The full salutation (e.g. Mr. John W. Smith) of the company adjuster assigned to the claim.
Personnel.adjuster.title	The title of the company adjuster assigned to the claim
Personnel.adjuster.signature	The signature of the company adjuster, consisting of their full name and suffix/designation
Personnel.adjuster.suffix	The suffix or designation of the company adjuster assigned to the claim (e.g. AIC, SPPA, Esq.)
Personnel.leadj.commission	The commission rate of the company ALE adjuster assigned to the claim

Personnel.leadj.email	The email address of the company ALE adjuster assigned to the claim
Personnel.leadj.firstName	The first name of the company ALE adjuster assigned to the claim
Personnel.leadj.lastName	The last name of the company ALE adjuster assigned to the claim
Personnel.leadj.honorific	The honorific (e.g. Mr., Mrs., Dr.) of the company ALE adjuster assigned to the claim
Personnel.leadj.initials	The initials of the company ALE adjuster assigned to the claim
Personnel.leadj.name	The name of the company ALE adjuster assigned to the claim
Personnel.leadj.nameInf	The name of the company ALE adjuster assigned to the claim formatted as "last name, first name"
Personnel.leadj.phone	The phone number of the company ALE adjuster assigned to the claim
Personnel.leadj.salutation	The full salutation (e.g. Mr. John W. Smith) of the company ALE adjuster assigned to the claim.
Personnel.leadj.signature	The signature of the company ALE adjuster, consisting of their full name and suffix/designation
Personnel.leadj.suffix	The suffix or designation of the company ALE adjuster assigned to the claim (e.g. AIC, SPPA, Esq.)
Personnel.leadj.title	The title of the company ALE adjuster assigned to the claim
Personnel.appraiser.commission	
	The commission rate of the company appraiser assigned to the claim
Personnel.appraiser.firstName	The first name of the company appraiser assigned to the claim
Personnel.appraiser.lastName	The last name of the company appraiser assigned to the claim
Personnel.appraiser.honorific	The honorific (e.g. Mr., Mrs., Dr.) of the company appraiser assigned to the claim
Personnel.appraiser.email	The email address of the company appraiser assigned to the claim
Personnel.appraiser.initials	The initials of the company appraiser assigned to the claim
Personnel.appraiser.name	The name of the company appraiser assigned to the claim
Personnel.appraiser.nameInf	The name of the company appraiser assigned to the claim formatted as "last name, first name"
Personnel.appraiser.phone	The phone number of the company appraiser assigned to the claim
Personnel.appraiser.salutation	The full salutation (e.g. Mr. John W. Smith) of the company appraiser assigned to the claim.
Personnel.appraiser.signature	The signature of the company appraiser, consisting of their full name and suffix/designation
Personnel.appraiser.suffix	The suffix or designation of the company appraiser assigned to the claim (e.g. AIC, SPPA, Esq.)
Personnel.appraiser.title	The title of the company appraiser assigned to the claim
Personnel.apprentice.commission	
	The commission rate of the company apprentice adjuster assigned to the claim

Personnel. apprentice.email	The email address of the company apprentice adjuster assigned to the claim
Personnel. apprentice.firstName	The first name of the company apprentice adjuster assigned to the claim
Personnel. apprentice.lastName	The last name of the company apprentice adjuster assigned to the claim
Personnel. apprentice.honorific	The honorific (e.g. Mr., Mrs., Dr.) of the company apprentice adjuster assigned to the claim
Personnel. apprentice.initials	The initials of the company apprentice adjuster assigned to the claim
Personnel. apprentice.name	The name of the company apprentice adjuster assigned to the claim
Personnel. apprentice.nameInf	The name of the company apprentice adjuster assigned to the claim formatted as “last name, first name”
Personnel. apprentice.phone	The phone number of the company apprentice adjuster assigned to the claim
Personnel. apprentice.salutation	The full salutation (e.g. Mr. John W. Smith) of the company apprentice adjuster assigned to the claim.
Personnel. apprentice.title	The title of the company apprentice adjuster assigned to the claim
Personnel.contentsadj	
Personnel.contentsadj.commission	The commission rate of the company contents adjuster assigned to the claim
Personnel. contentsadj.email	The email address of the company contents adjuster assigned to the claim
Personnel. contentsadj.firstName	The first name of the company contents adjuster assigned to the claim
Personnel. contentsadj.lastName	The last name of the company contents adjuster assigned to the claim
Personnel. contentsadj.honorific	The honorific (e.g. Mr., Mrs., Dr.) of the company contents adjuster assigned to the claim
Personnel. contentsadj.initials	The initials of the company contents adjuster assigned to the claim
Personnel. contentsadj.name	The name of the company contents adjuster assigned to the claim
Personnel. contentsadj.nameInf	The name of the company contents adjuster assigned to the claim formatted as “last name, first name”
Personnel. contentsadj.phone	The phone number of the company contents adjuster assigned to the claim
Personnel. contentsadj.salutation	The full salutation (e.g. Mr. John W. Smith) of the company contents adjuster assigned to the claim.
Personnel.contentsadj.signature	The signature of the company contents adjuster, consisting of their full name and suffix/designation
Personnel.contentsadj.suffix	The suffix or designation of the company contents adjuster assigned to the claim (e.g. AIC, SPPA, Esq.)
Personnel. contentsadj.title	The title of the company contents adjuster assigned to the

	claim
Personnel.estimator.commission	The commission rate of the company estimator assigned to the claim
Personnel.estimator.email	The email address of the company estimator assigned to the claim
Personnel.estimator.firstName	The first name of the company estimator assigned to the claim
Personnel.estimator.lastName	The last name of the company estimator assigned to the claim
Personnel.estimator.honorific	The honorific (e.g. Mr., Mrs., Dr.) of the company estimator assigned to the claim
Personnel.estimator.initials	The initials of the company estimator assigned to the claim
Personnel.estimator.name	The name of the company estimator assigned to the claim
Personnel.estimator.nameInf	The name of the company estimator assigned to the claim formatted as "last name, first name"
Personnel.estimator.phone	The phone number of the company estimator assigned to the claim
Personnel.estimator.salutation	The full salutation (e.g. Mr. John W. Smith) of the company estimator assigned to the claim.
Personnel.estimator.signature	The signature of the company estimator, consisting of their full name and suffix/designation
Personnel.estimator.suffix	The suffix or designation of the company estimator assigned to the claim (e.g. AIC, SPPA, Esq.)
Personnel.estimator.title	The title of the company adjuster assigned to the claim
Personnel.lossconsultant.commission	The commission rate of the company loss consultant assigned to the claim
Personnel. lossconsultant.email	The email address of the company loss consultant assigned to the claim
Personnel. lossconsultant.firstName	The first name of the company loss consultant assigned to the claim
Personnel. lossconsultant.lastName	The last name of the company loss consultant assigned to the claim
Personnel. lossconsultant.honorific	The honorific (e.g. Mr., Mrs., Dr.) of the company loss consultant assigned to the claim
Personnel. lossconsultant.initials	The initials of the company loss consultant assigned to the claim
Personnel. lossconsultant.name	The name of the company loss consultant assigned to the claim
Personnel. lossconsultant.nameInf	The name of the company loss consultant assigned to the claim formatted as "last name, first name"
Personnel. lossconsultant.phone	The phone number of the company loss consultant assigned to the claim
Personnel. lossconsultant.salutation	The full salutation (e.g. Mr. John W. Smith) of the company loss consultant assigned to the claim.
Personnel.lossconsultant.signature	The signature of the company loss consultant, consisting of their full name and suffix/designation
Personnel.lossconsultant.suffix	The suffix or designation of the company loss consultant

	assigned to the claim (e.g. AIC, SPPA, Esq.)
Personnel. lossconsultant.title	The title of the company loss consultant assigned to the claim
Personnel. originator.commission	The commission rate of the company claim originator for the claim
Personnel. originator.email	The email address of the company claim originator for the claim
Personnel. originator.firstName	The first name of the company claim originator for the claim
Personnel. originator.lastName	The last name of the company claim originator for the claim
Personnel. originator.honorific	The honorific (e.g. Mr., Mrs., Dr.) of the company claim originator for the claim
Personnel. originator.initials	The initials of the company claim originator for the claim
Personnel. originator.name	The name of the company claim originator for the claim
Personnel. originator.nameInf	The name of the company claim originator for the claim formatted as "last name, first name"
Personnel. originator.phone	The phone number of the company claim originator for the claim
Personnel. originator.salutation	The full salutation (e.g. Mr. John W. Smith) of the company claim originator for the claim
Personnel. originator.title	The title of the company claim originator for the claim
Personnel. sales.commission	The commission rate of the company sales representative assigned to the claim
Personnel. sales.email	The email address of the company sales representative assigned to the claim
Personnel. sales.firstName	The first name of the company sales representative assigned to the claim
Personnel. sales.lastName	The last name of the company sales representative assigned to the claim
Personnel. sales.honorific	The honorific (e.g. Mr., Mrs., Dr.) of the company sales representative assigned to the claim
Personnel. sales.initials	The initials of the company sales representative assigned to the claim
Personnel. sales.name	The name of the company sales representative for the claim
Personnel. sales.phone	The phone number of the company sales representative for the claim
Personnel. sales.salutation	The full salutation (e.g. Mr. John W. Smith) of the company sales representative assigned to the claim.
Personnel. sales.title	The title of the company sales representative assigned to the claim
Personnel. signer.commission	The commission rate of the company contract signer for the claim
Personnel. signer.email	The email address of the company contract signer for the claim
Personnel. signer.firstName	The first name of the company contract signer for the claim

Personnel.signer.lastName	The last name of the company contract signer for the claim
Personnel.signer.honorific	The honorific (e.g. Mr., Mrs., Dr.) of the company contract signer for the claim
Personnel.signer.initials	The initials of the company contract signer for the claim
Personnel.signer.name	The name of the company contract signer for the claim
Personnel.signer.nameInf	The name of the company contract signer for the claim formatted as “last name, first name”
Personnel.signer.phone	The phone number of the company contract signer for the claim
Personnel.signer.salutation	The full salutation (e.g. Mr. John W. Smith) of the company contract signer for the claim
Personnel.signer.title	The title of the company contract signer for the claim
Personnel.umpire.commission	The commission rate of the company umpire assigned to the claim
Personnel.umpire.email	The email address of the company umpire assigned to the claim
Personnel.umpire.firstName	The first name of the company umpire assigned to the claim
Personnel.umpire.lastName	The last name of the company umpire assigned to the claim
Personnel.umpire.honorific	The honorific (e.g. Mr., Mrs., Dr.) of the company umpire assigned to the claim
Personnel.umpire.initials	The initials of the company umpire assigned to the claim
Personnel.umpire.name	The name of the company umpire assigned to the claim
Personnel.umpire.nameInf	The name of the company umpire assigned to the claim formatted as “last name, first name”
Personnel.umpire.phone	The phone number of the company umpire assigned to the claim
Personnel.umpire.salutation	The full salutation (e.g. Mr. John W. Smith) of the company umpire assigned to the claim.
Personnel.umpire.signature	The signature of the company umpire, consisting of their full name and suffix/designation
Personnel.umpire.suffix	The suffix or designation of the company umpire assigned to the claim (e.g. AIC, SPPA, Esq.)
Personnel.umpire.title	The title of the company umpire assigned to the claim
Policyholders.firstname	A list of the first names of each client and client contact marked as a policyholder.
Policyholders.names	A list of the full names of each client and client contact marked as a policyholder.
Policyholders.email	A list of the emails of each client and client contact marked as a policyholder.
Policyholders.email2	A list of the secondary emails of each client and client contact marked as a policyholder.
Policyholders.phones	A list of the phone numbers of each client and client contact marked as a policyholder.

Property.isInhabitable	A boolean value indicating whether the property is inhabitable
Property.occupancy	The occupancy purpose of the property
Property.owningEntity	The name of the owning entity of a property.
Property.photo	The featured photo of the property. See “Sizing Images” for options.
Propmgmt.company	The name of the property management company on the claim
Propmgmt.name	The full name of the property management contact on the claim
Propmgmt.firstName	The first name of the property management company contact on the claim
Propmgmt.lastName	The last name of the property management company contact on the claim
Propmgmt.salutation	Formats the property management company contact’s name for use in a salutation. If an honorific is present, the field will use the honorific and the last name (e.g. Mr. Smith). If the honorific is not present, it will use the first name. Otherwise it will use “Sir/Madam”
Propmgmt.address.line1	The first line of the property management company’s mailing address, which includes the first and second street values
Propmgmt.address.line2	The second line of the property management company’s mailing address, which includes the city, state and zip code
Propmgmt.address.street1	The first street value of the property management company’s mailing address
Propmgmt.address.street2	The second street value of the property management company’s mailing address, typically a suite or unit number
Propmgmt.address.city	The city of the property management company’s mailing address
Propmgmt.address.state	The two-lettered state of the property management company’s mailing address
Propmgmt.address.zip	The postal zip code of the property management company’s mailing address
Propmgmt. email	The property management company contact’s email address
Propmgmt.phone	The property management company contact’s preferred telephone contact. If a phone number has not be indicated as being “preferred”, the first available phone number will be returned
Propmgmt.phone.cell	The property management company contact’s cell phone number
Propmgmt.phone.fax	The property management company contact’s fax number
Propmgmt.phone.mobile	The property management company contact’s cell phone number. This is an alias for property management company.phone.cell
Propmgmt.phone.home	The property management company’s home telephone number
Propmgmt.phone.main	The property management company’s main telephone number
Propmgmt.phone.work	The property management company’s work phone number

Propmgmt. www	The property management company's website address
Settlement.acv	The Actual Cash Value specified in the settlement
Settlement.collected	The total amount collected on the settlement
Settlement.dateOffered	The date that the settlement was offered
Settlement.datePaid	The date that the settlement was paid in full
Settlement.deductible	The amount of the deductible applied to the settlement offer
Settlement.description	The name or description of the settlement (e.g. Dwelling, Contents)
Settlement.fee	The company fee based on the net amount of the settlement entry
Settlement.finalOrPartial	Whether the settlement offer is final or partial
Settlement.fullDepreciation	The total depreciation (recoverable and non-recoverable) of the settlement. See also <i>Settlement.recoverable</i> and <i>Settlement.nonrecoverable</i> .
Settlement.holdback	The recoverable depreciation amount on the settlement. Same as <i>Settlement.recoverable</i>
Settlement.isFinal	"YES" if the settlement is final
Settlement.isPartial	"YES" if the settlement is partial
Settlement.netClaimed	The amount of the settlement after deductibles, depreciation and prior payments
Settlement.netLessFee	The amount of the settlement after deductibles, depreciation prior payments and the company fee based on the net settlement amount
Settlement.nonrecoverable	The nonrecoverable depreciation amount on the settlement
Settlement.note	The value of the note field for the settlement
Settlement.polDate	The date that the Proof of Loss was recorded on the settlement
Settlement.prior	The prior payment amount applied to the settlement offer
Settlement.recoverable	The recoverable depreciation amount on the settlement. Same as <i>Settlement.holdback</i>
Settlement.rcv	The replacement cost value specified for the settlement. Same as <i>Settlement.replacementCost</i>
Settlement.replacementCost	The replacement cost value specified for the settlement. Same as <i>Settlement.rcv</i>
Settlement.status	The acceptance status for the settlement.
Settlements.list.acv	The Actual Cash Value for each settlement. The value is printed for each settlement offer, one on each line.
Settlements.list.collected	The total amount collected for each settlement. The value is printed for each settlement offer, one on each line.
Settlements.list.dateOffered	The date that each settlement was offered. The value is printed for each settlement offer, one on each line.
Settlements.list.datePaid	The date that each settlement was paid in full. The value is printed for each settlement offer, one on each line.
Settlements.list.deductible	The amount of the deductible applied to each settlement offer.

	The value is printed for each settlement offer, one on each line.
Settlements.list.description	The name or description of each settlement (e.g. Dwelling, Contents). The value is printed for each settlement offer, one on each line.
Settlements.list.finalOrPartial	Whether each settlement offer is final or partial. The value is printed for each settlement offer, one on each line.
Settlements.list.fullDepreciation	The total depreciation (recoverable and non-recoverable) of each settlement. The value is printed for each settlement offer, one on each line. See also <i>Settlement.list.recoverable</i> and <i>Settlement.list.nonrecoverable</i> .
Settlements.list.holdback	The recoverable depreciation amount on each settlement. The value is printed for each settlement offer, one on each line. Same as <i>Settlement.list.recoverable</i>
Settlements.list.isFinal	“YES” if the settlement is final. The value is printed for each settlement offer, one on each line.
Settlements.list.isPartial	“YES” if the settlement is partial. The value is printed for each settlement offer, one on each line.
Settlements.list.netClaimed	The amount of each settlement after deductibles, depreciation and prior payments. The value is printed for each settlement offer, one on each line.
Settlements.list.nonrecoverable	The nonrecoverable depreciation amount on each settlement. The value is printed for each settlement offer, one on each line.
Settlements.list.polDate	The date that the Proof of Loss was recorded on each settlement
Settlements.list.prior	The prior payment amount applied to each settlement offer. The value is printed for each settlement offer, one on each line.
Settlements.list.recoverable	The recoverable depreciation amount on each settlement. The value is printed for each settlement offer, one on each line. Same as <i>Settlement.holdback</i>
Settlements.list.rcv	The replacement cost value specified for each settlement. The value is printed for each settlement offer, one on each line. Same as <i>Settlement.list.replacementCost</i>
Settlements.list.replacementCost	The replacement cost value specified for each settlement. The value is printed for each settlement offer, one on each line. Same as <i>Settlement.list.rcv</i>
Settlements.list.status	The acceptance status for each settlement. The value is printed for each settlement offer, one on each line.
Settlements.total	Totals all net settlement offers that have been marked as accepted
Settlements.total.ale	Totals all net ALE settlement offers that have been marked as accepted
Settlements.total.contents	Totals all net Contents settlement offers that have been marked as accepted
Settlements.total.dwelling	Totals all net Dwelling settlement offers that have been marked

	as accepted
Settlements.total.income	Totals all net Loss of Income/Business Interruption/BI settlement offers that have been marked as accepted
settlements.total.rcv	Totals all RCV amounts from settlement offers that have been marked as accepted
Settlements.total.structures	Totals all net Structures/Other Structures settlement offers that have been marked as accepted
Settlements.total.supplemental	Totals all net Supplemental settlement offers that have been marked as accepted
Settlements.total.<description>	Totals all net settlement offers that have the specified description and have been marked as accepted. An example of this might be Settlements.total.storage that would provide a total of all settlements whose description is "Storage". Note that the < > characters are not included in the actual field name.
Today	A special field that returns today's date (the date that the document is generated)
User.email	The email address of the user generating the document.
User.name	The full name of the user generating the document.
User.firstname	The first name of the user generating the document.
User.lastname	The last name of the user generating the document.
User.signature	The signature of the user, consisting of their full name and suffix/designation
User.salutation	Formats the user's name for use in a salutation
User.company	The company name of the user generating the document.



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