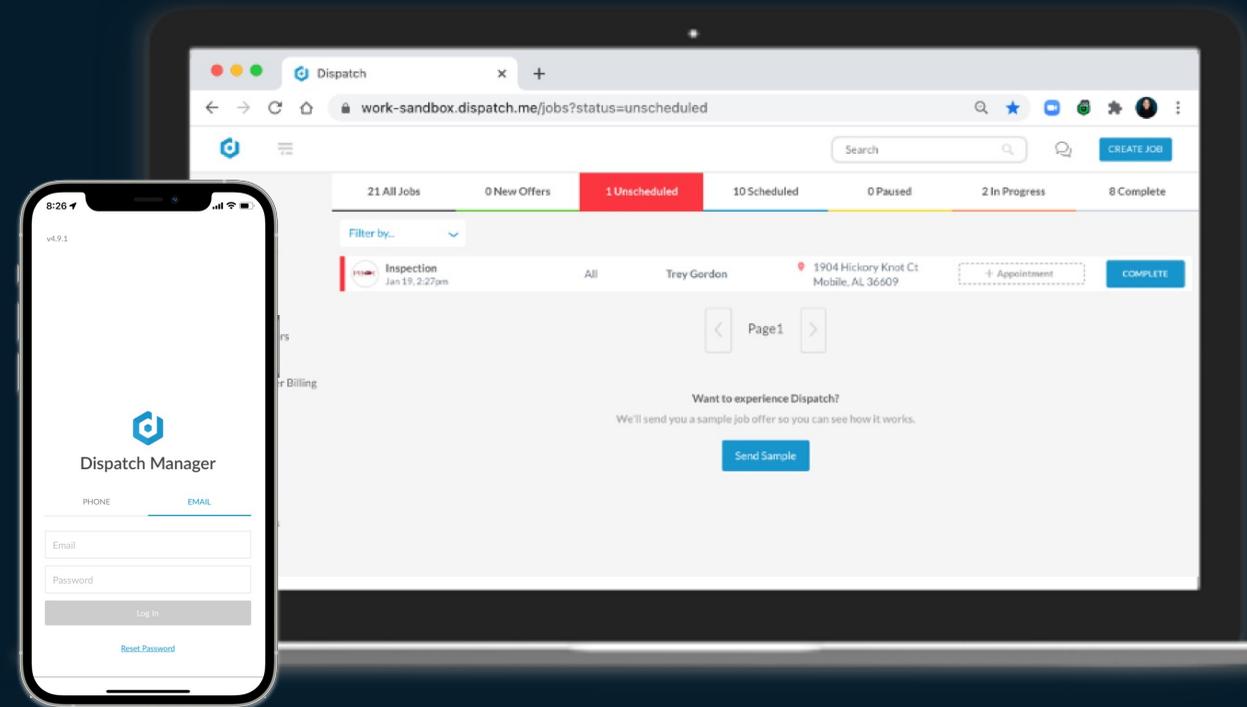




Own Every Service Experience, From Lead to Lifetime Customer

Pilot: Adjusters on Demand

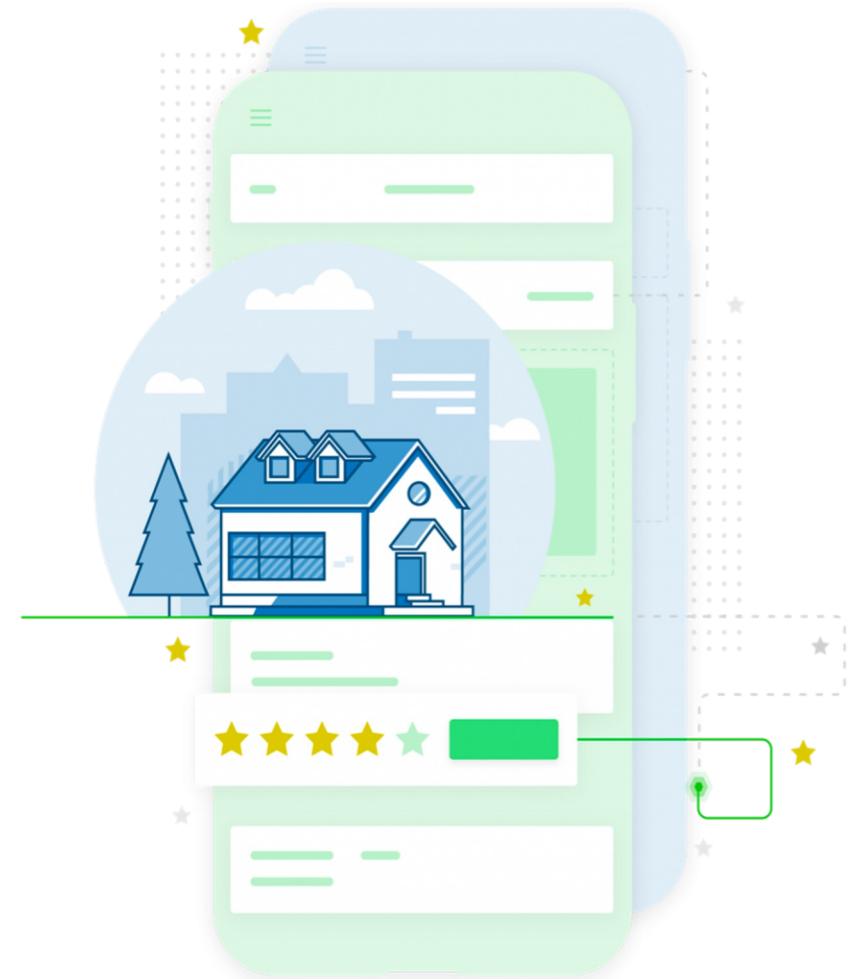
Dispatch Training for AOD Claims



November 2022

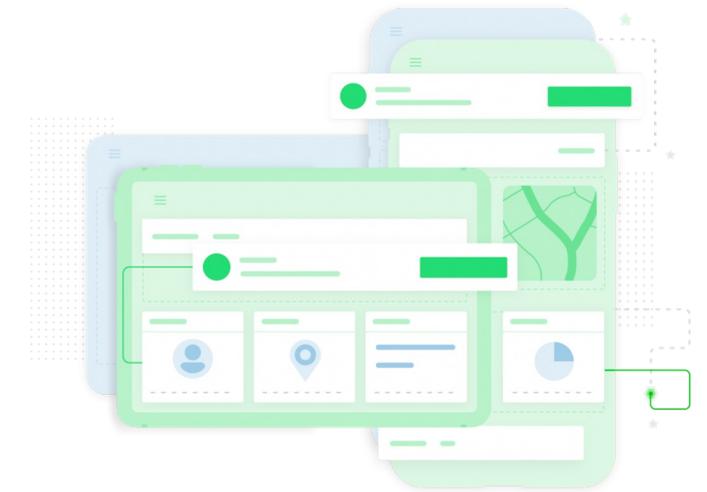
Agenda & Goals

- What is Dispatch?
- Getting Started
- Demo: Pilot Workflow in Dispatch
- Resources



What's in it for Adjusters?

- Instant, easy communication when you're deployed
- Simple to learn & use
- Fast track initial contact with the insured, using inbox messaging
- Stay on task & update claims from the field (*integration with Catalyst*)
- Enhanced experience for the insured, keeping them in the loop with automated alerts
- Free tool paid for by Pilot (*\$1,200+/year value*)



Getting Started

Check your XACTNET address in My Pilot

Sign into the portal with your Pilot ID and password
Click on your name in upper right and select MyPilot



Contact Virtual Support if your Xactnet address is **incorrect or blank**

virtualclaimssupport@pilotcat.com

Text Support: **251-551-5195**

The screenshot displays the PilotCat user interface. On the left is a dark sidebar with the PilotCat logo and a navigation menu. The main content area is titled 'Adjuster Name' and contains several sections. The 'Xactimate Information' section is highlighted, and within it, the 'XactNet Address' field is enclosed in a red rectangular box. A red arrow points from the top right towards this box. The 'Xactimate Information' section includes fields for Xactware ID, Your Pilot Email Address (with an 'Edit' button), Xactware Account #, Xactimate Key Code, and XactNet Address. Below this is the 'Xactimate Certifications' section, which lists Xactimate Level 1, 2, and 3, Xactimate Tech Support, and Xactimate Trainer Affiliate, all with 'N/A' values.

PilotCat
Service | Innovation | Community

- Home
- Account
- Licenses
- Xactimate**
- Payment
- Asset Agreements
- Communications
- Pay Stubs
- Deployments
- Skills Survey

Adjuster Name

Xactimate

i Xactimate Information

Xactware ID
Your Pilot Email Address **Edit**

Xactware Account #
Account #

Xactimate Key Code
KEY CODE

XactNet Address
YOUR XACTNET ADDRESS

⚙️ Xactimate Certifications

Xactimate Level 1
N/A

Xactimate Level 2
N/A

Xactimate Level 3
N/A

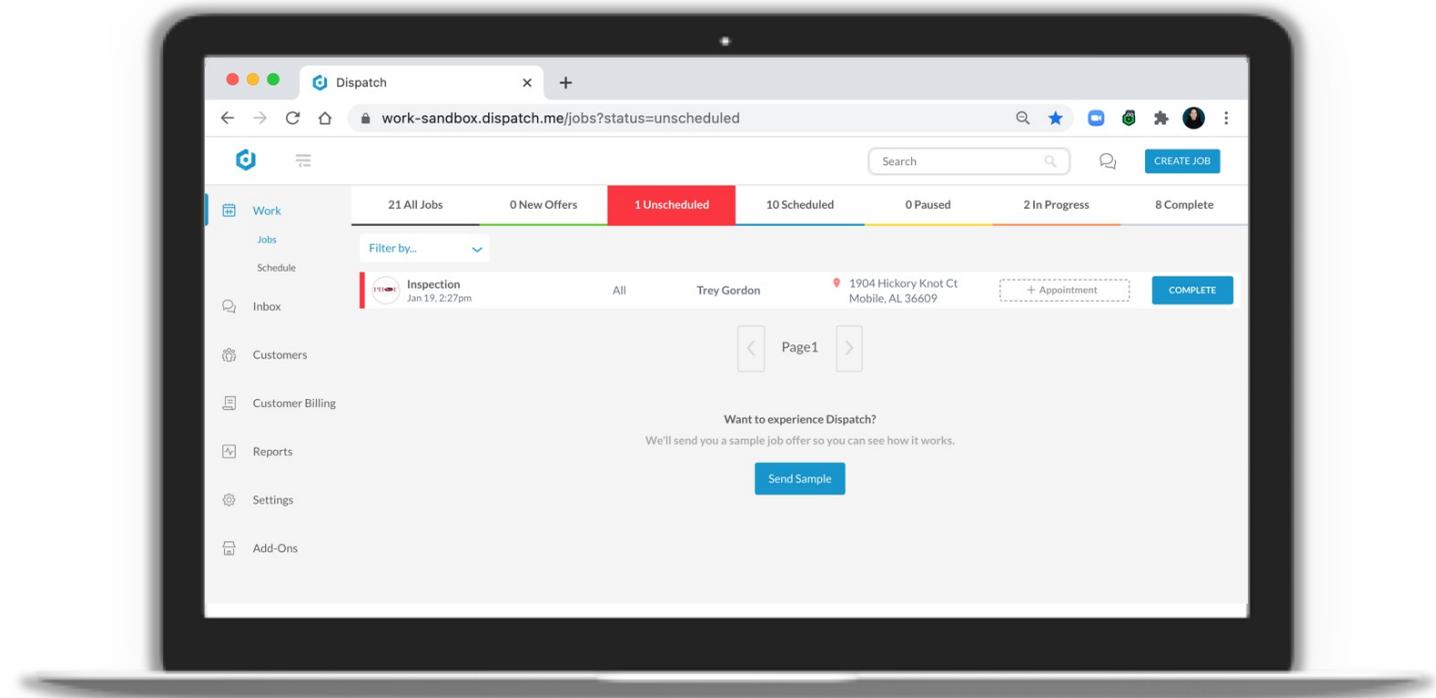
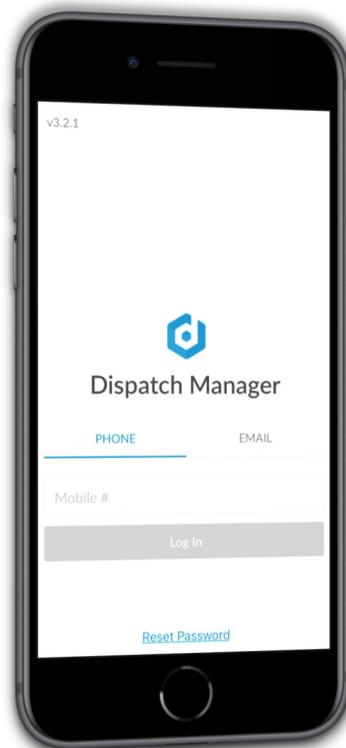
Xactimate Tech Support
N/A

Xactimate Trainer Affiliate
N/A

Dispatch Tools

You will have access to the **Dispatch Manager mobile app** and the desktop app.

The desktop app can be accessed by visiting **Work.Dispatch.Me** in a web browser.



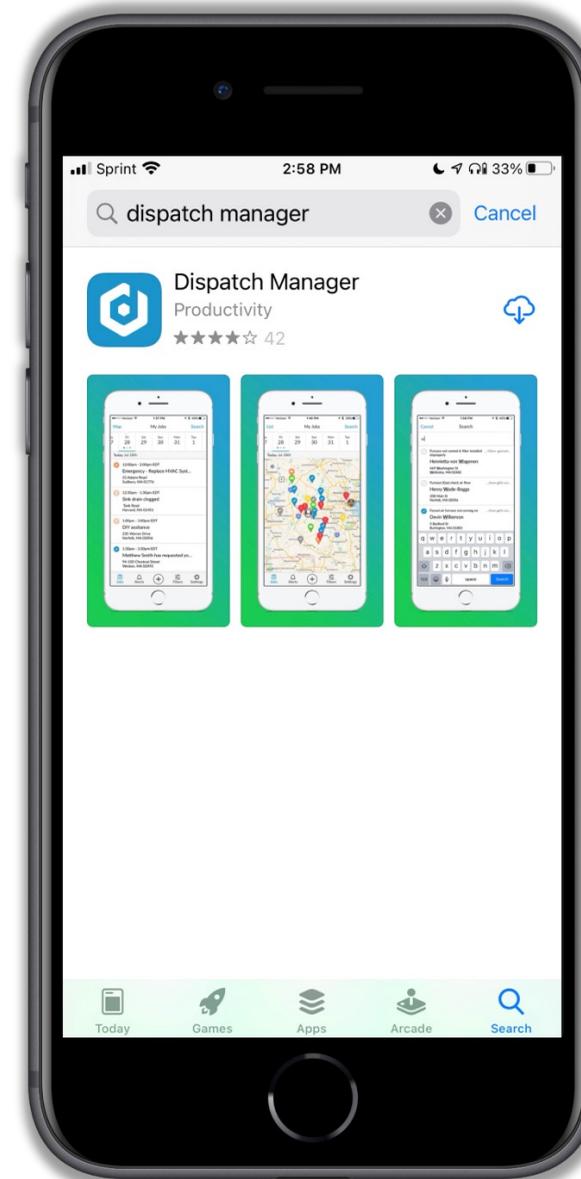
Download Mobile App: Dispatch Manager

1. Visit your Google Play or Apple App store and search **Dispatch Manager**
2. Download your free mobile app!



Dispatch Manager
Dispatch Technologies, Inc.

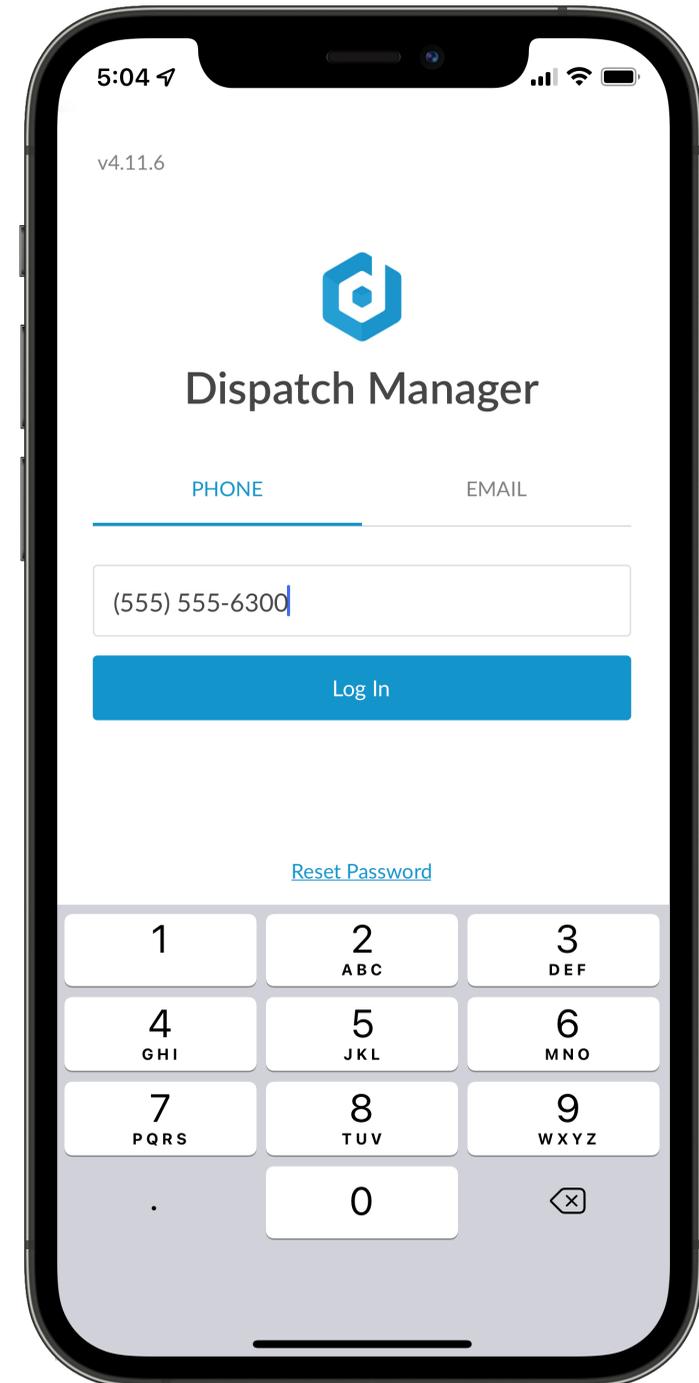
OPEN



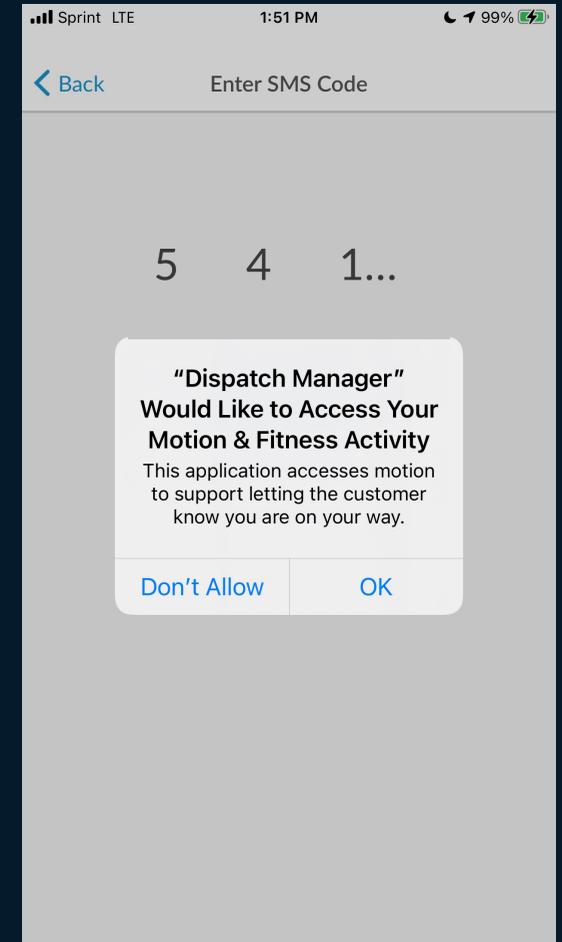
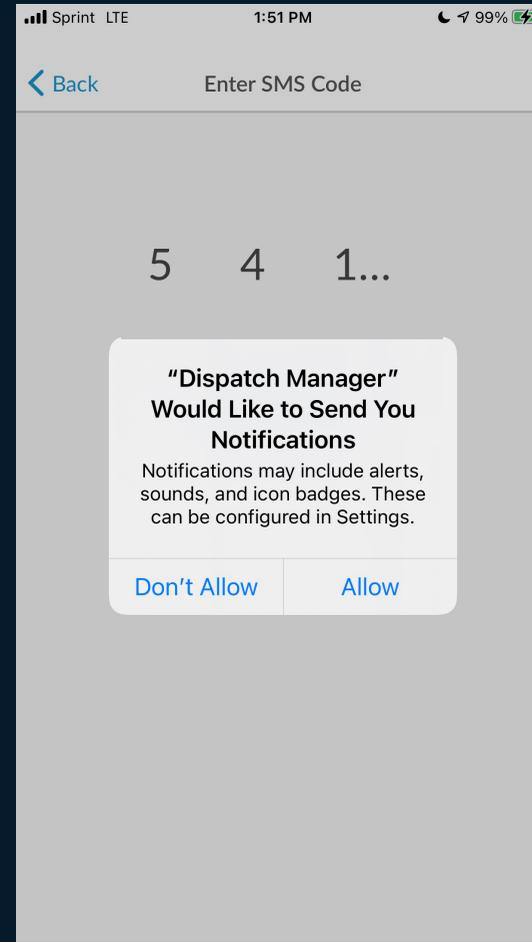
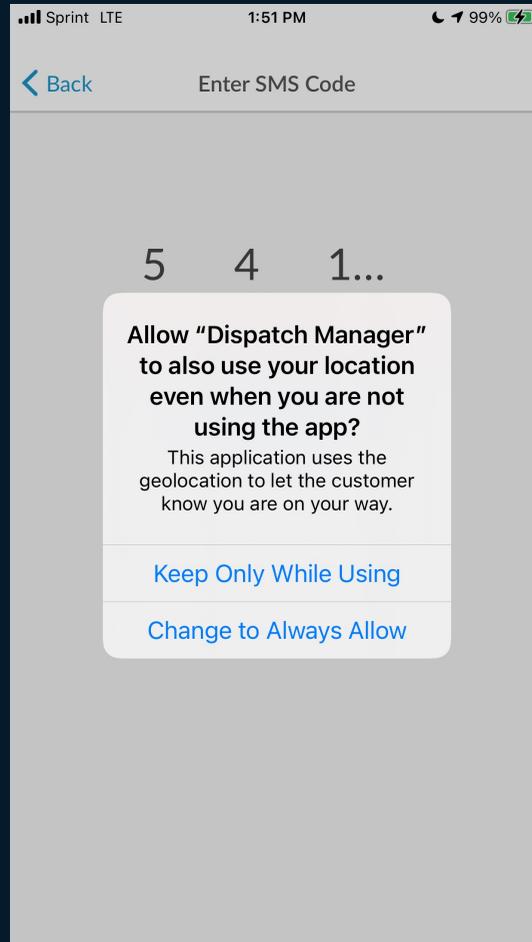
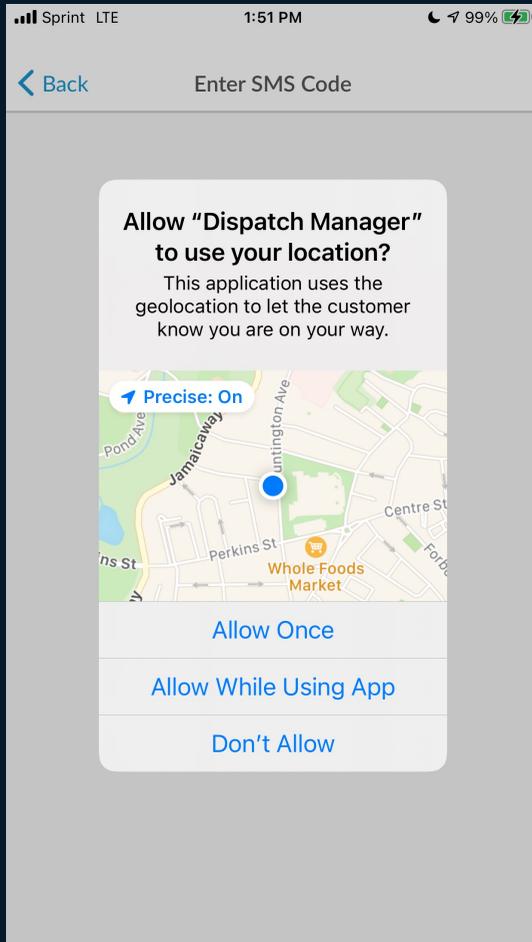
Initial Login to Dispatch

1. Open the app
2. Enter your cellphone number and tap 'Login'
3. You will receive a 4-digit code via text message that you'll use to login.

You'll use this method each time, so you'll never need to remember a username or password!



Setup Permissions

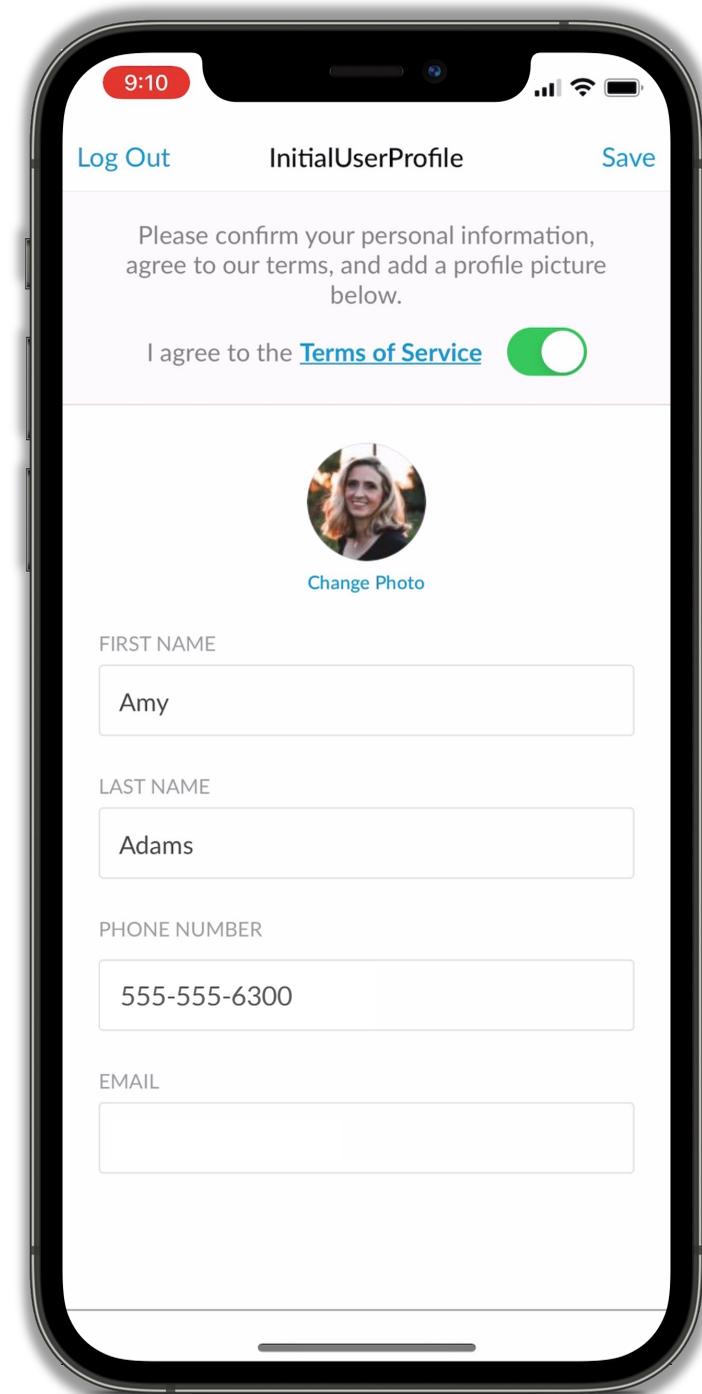


Initial Setup

When you login, you will see the welcome screen.

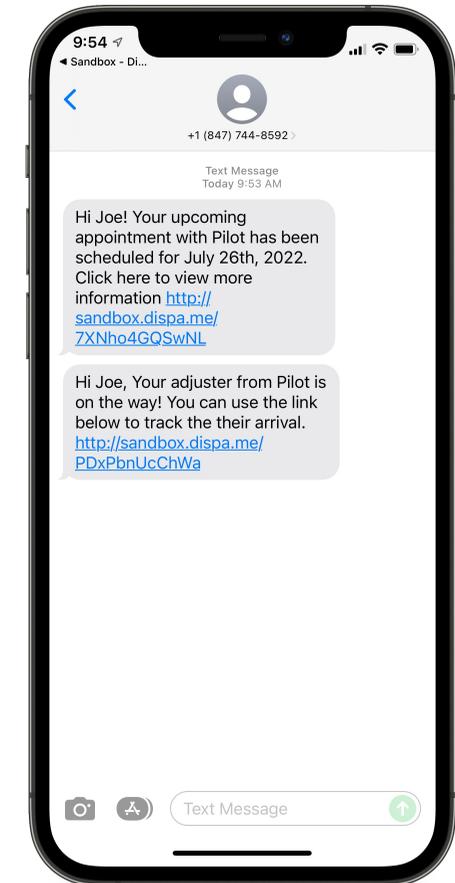
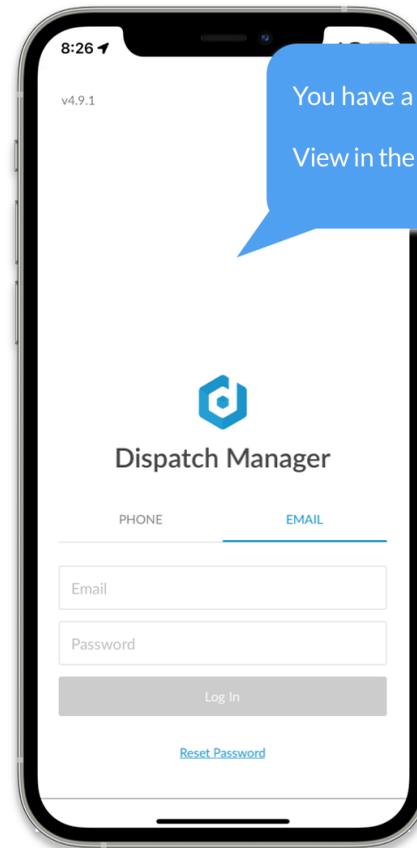
From here:

- Click "Allow" on pop-ups requesting permissions
- Review & Agree to the Terms of Service
- Add your photo
- Add a short bio
- Tap 'Save'



The screenshot shows a mobile app interface for an initial user profile setup. At the top, the status bar displays the time 9:10, signal strength, Wi-Fi, and battery icons. The app header includes a 'Log Out' link, the title 'InitialUserProfile', and a 'Save' button. The main content area contains a confirmation message: 'Please confirm your personal information, agree to our terms, and add a profile picture below.' Below this is a toggle switch for 'I agree to the Terms of Service', which is currently turned on. A circular profile picture of a woman is shown with a 'Change Photo' link underneath. Below the photo are four text input fields: 'FIRST NAME' (containing 'Amy'), 'LAST NAME' (containing 'Adams'), 'PHONE NUMBER' (containing '555-555-6300'), and 'EMAIL' (empty).

High-Level Overview



Pilot

Receives claim from the Carrier and sends it to the Adjuster

Adjuster

View claim details, update initial contact, schedule & complete inspection in Dispatch

The Insured

Receives notifications throughout the process, keeping them informed every step of the way!

Workflow Summary

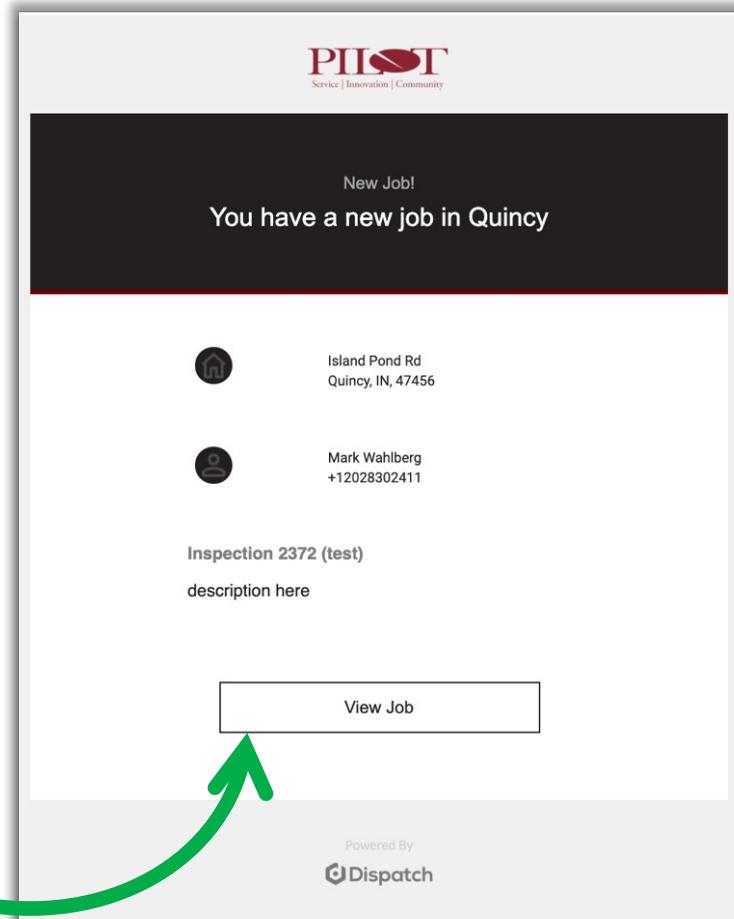
1. You'll be notified that new work from Pilot is in Dispatch.
You will be notified via email and text message (if added to your profile!)
2. View claim details in Dispatch and contact the Insured.
(inbox messaging helps with this!)
3. Complete Initial Contact Form in Dispatch.
****If there is Attorney/PA involvement on the claim, make sure that is indicated in the initial contact form****
4. Push the 'On My Way' button in Dispatch when you're ready to go.
5. Push the 'Start Appointment' button in Dispatch upon arrival.
6. Perform the inspection .
7. Complete the appointment in Dispatch when you're finished!



Pilot AOD Workflow

Pilot will send you claims **in Dispatch**

You will be notified about new claims from Pilot via email and SMS



Clicking "View Job" in the email will take you to the Dispatch Desktop app!

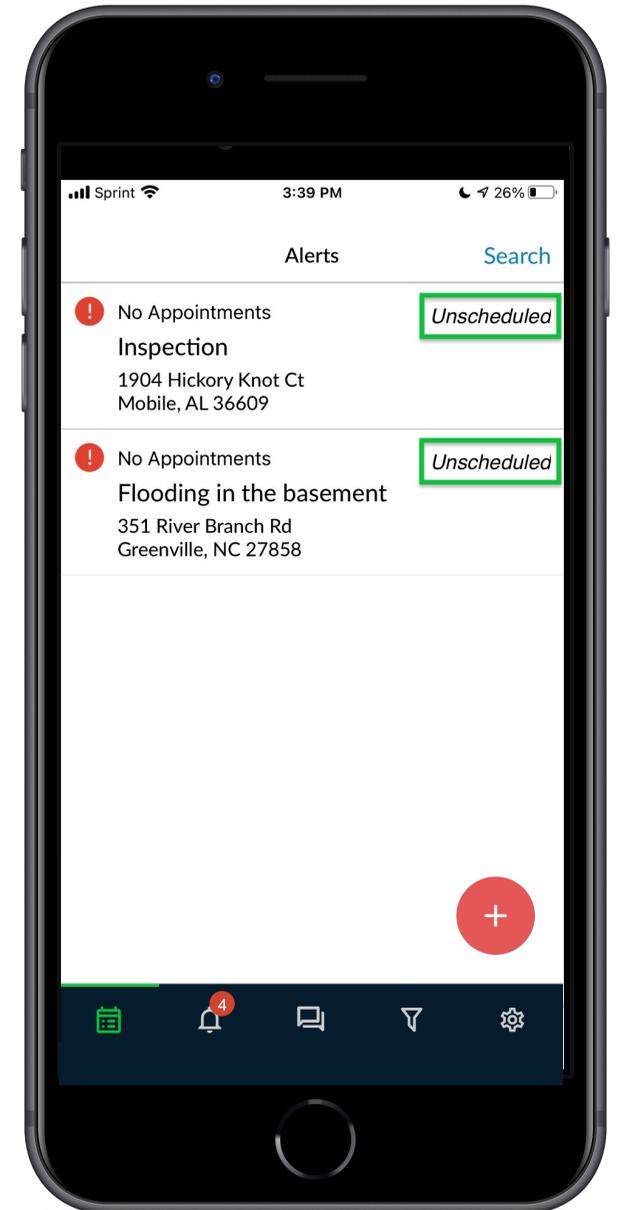
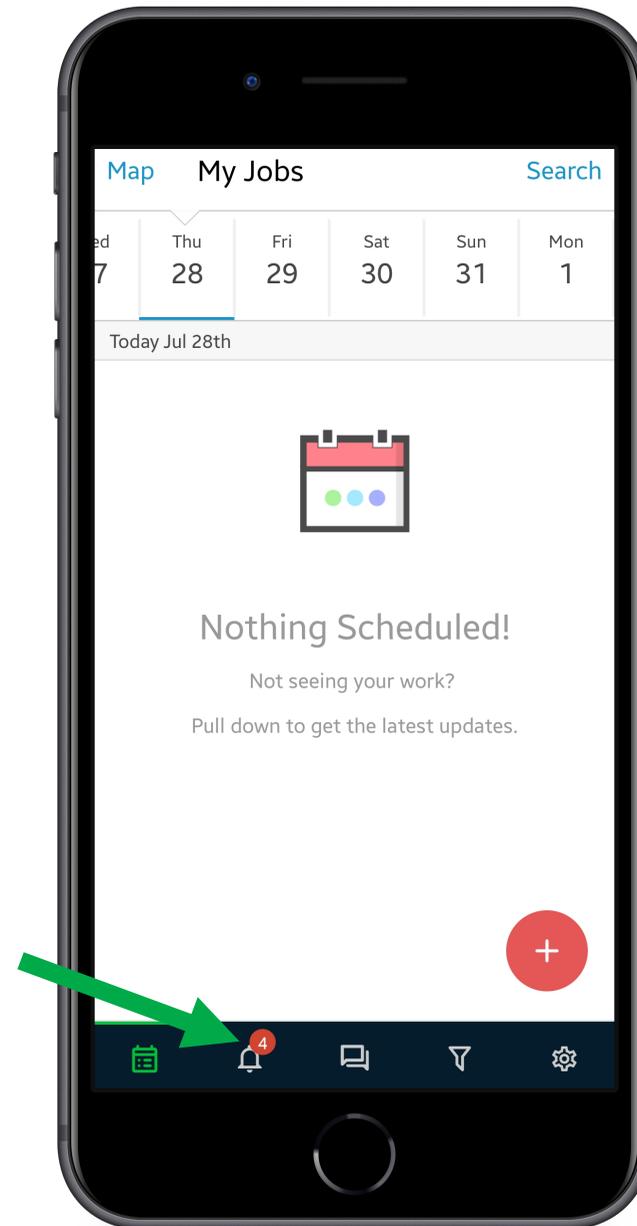


Viewing New Claims

Claims will be shown as
'Unscheduled' Jobs.

To View New Claims:

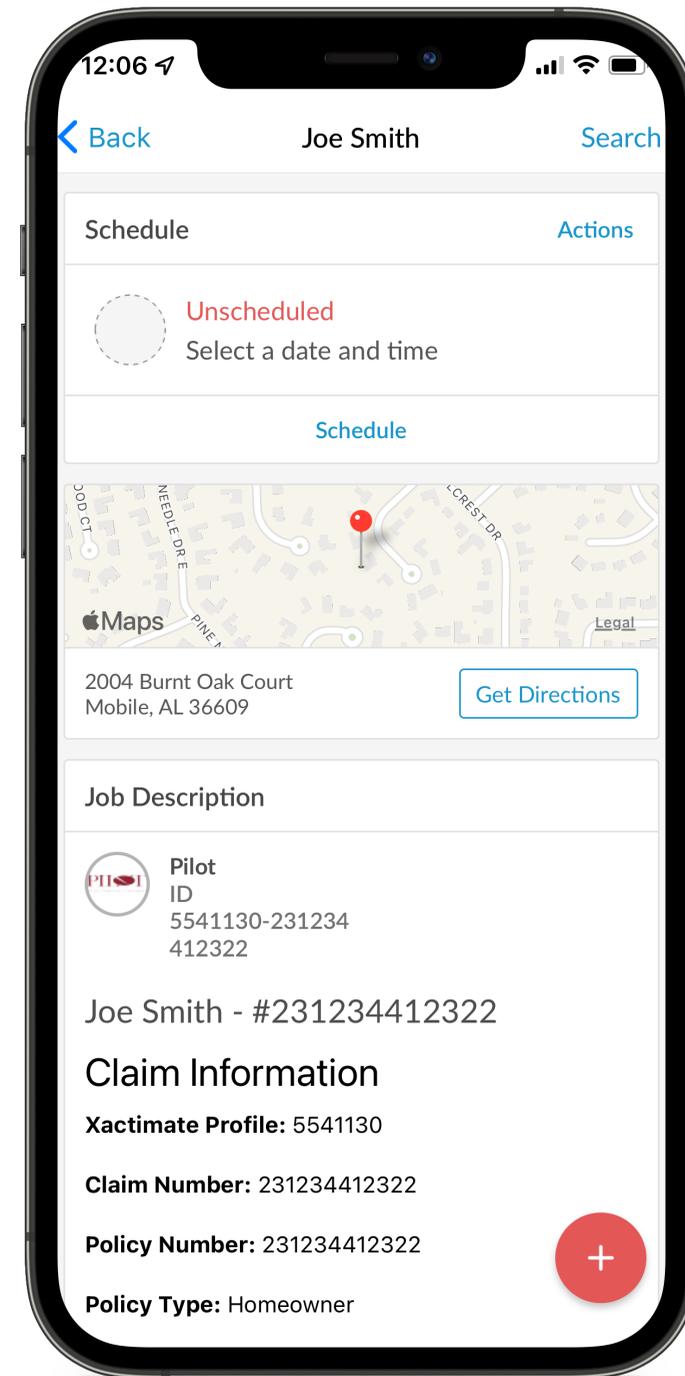
1. Open the Manager Mobile App
2. Select **Alerts** from the menu bar
3. Any new claims will be listed here- click on the claim to view claim details!



Claim Details

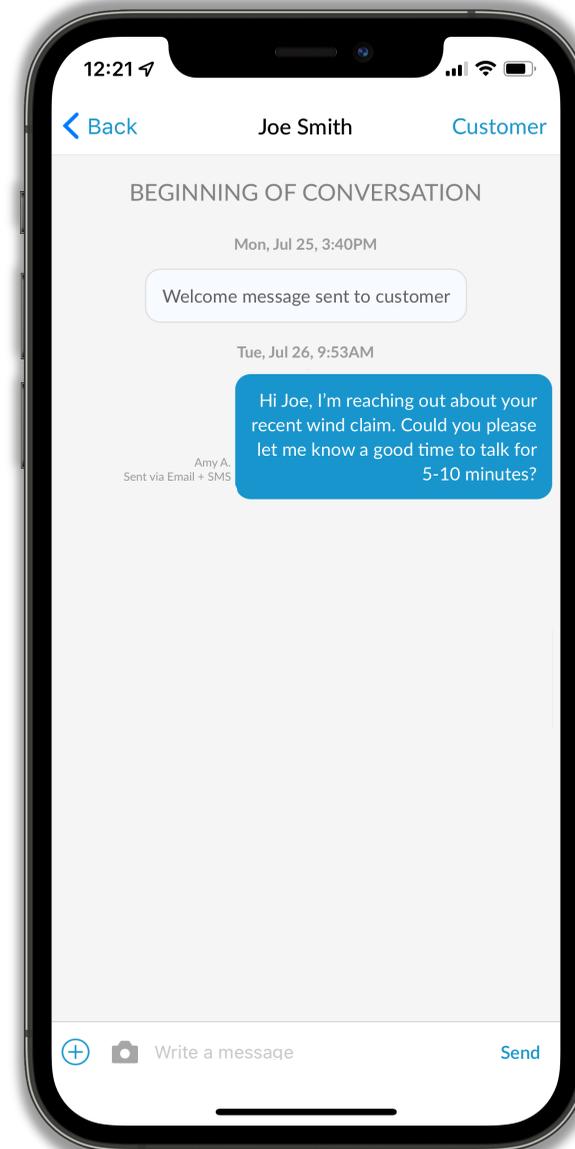
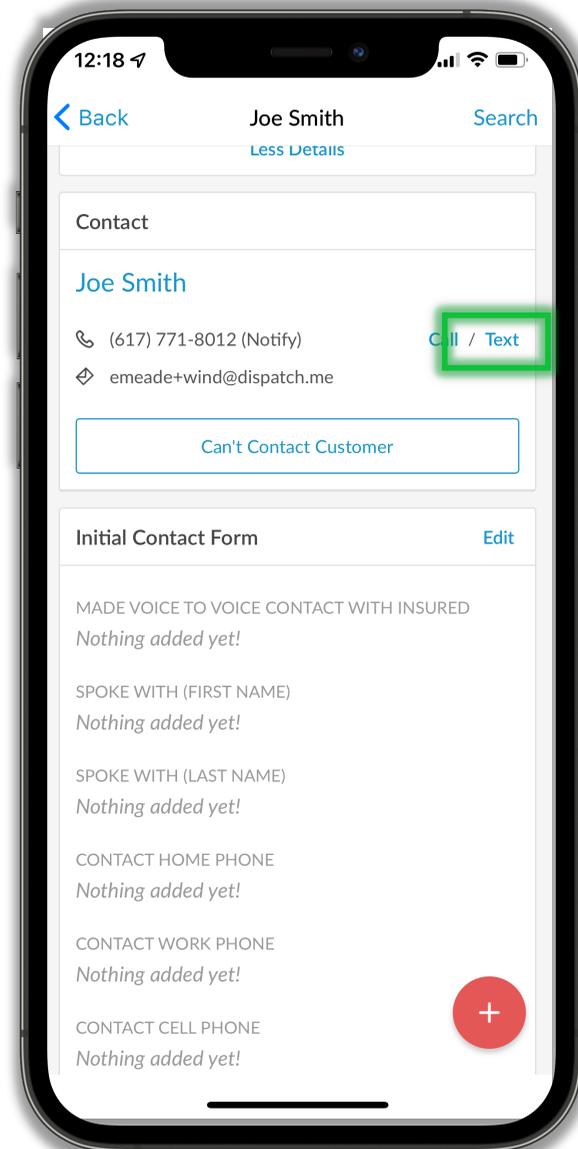
Included on this page:

- Inspection Address
- Contact info for the Insured
- Option to text the insured using inbox
- Claim details sent by Pilot
- Initial Contact Form
- Contact Notifications Form



Inbox Messaging

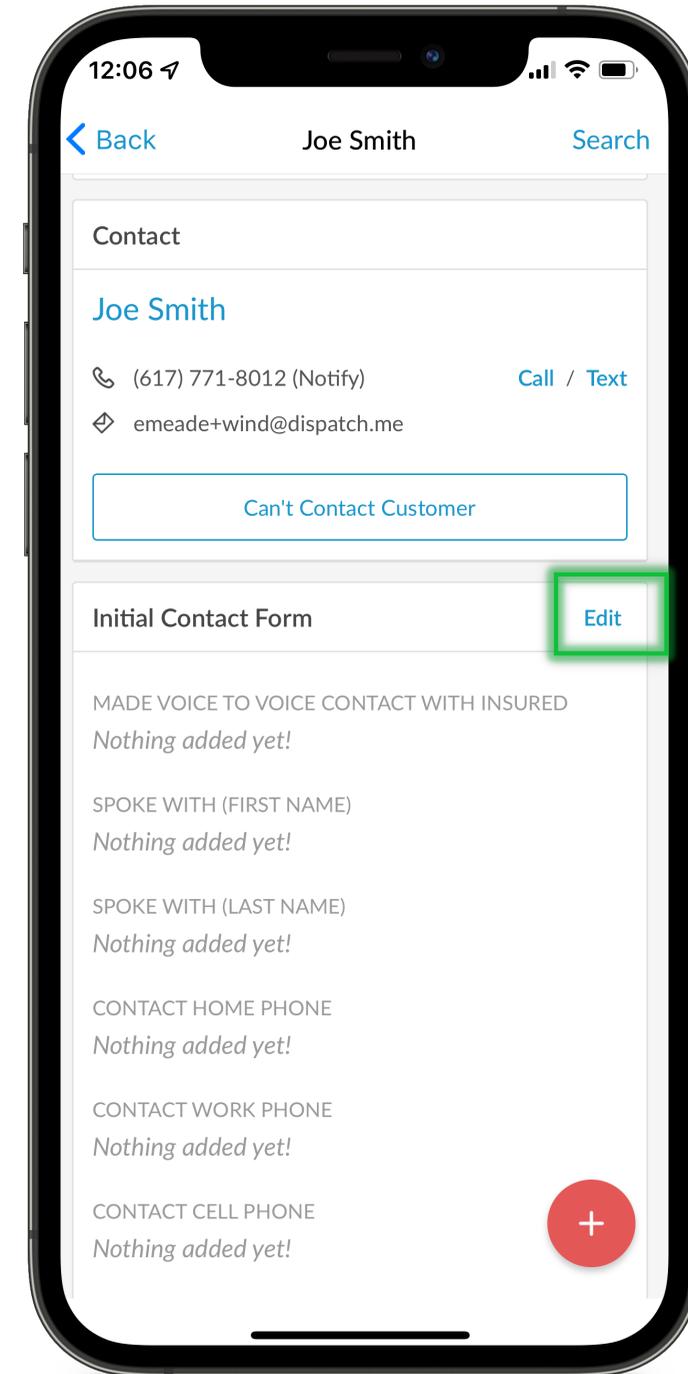
Text the insured using Dispatch Inbox



Initial Contact Form

Included on the Claim Details page and can be edited via Mobile App or Web App.

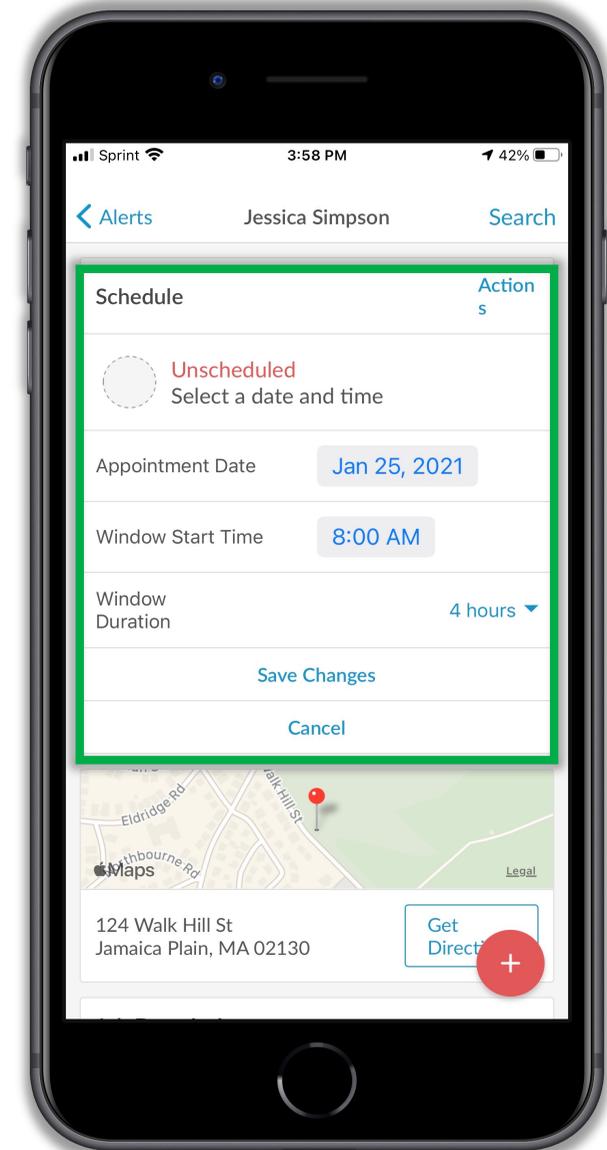
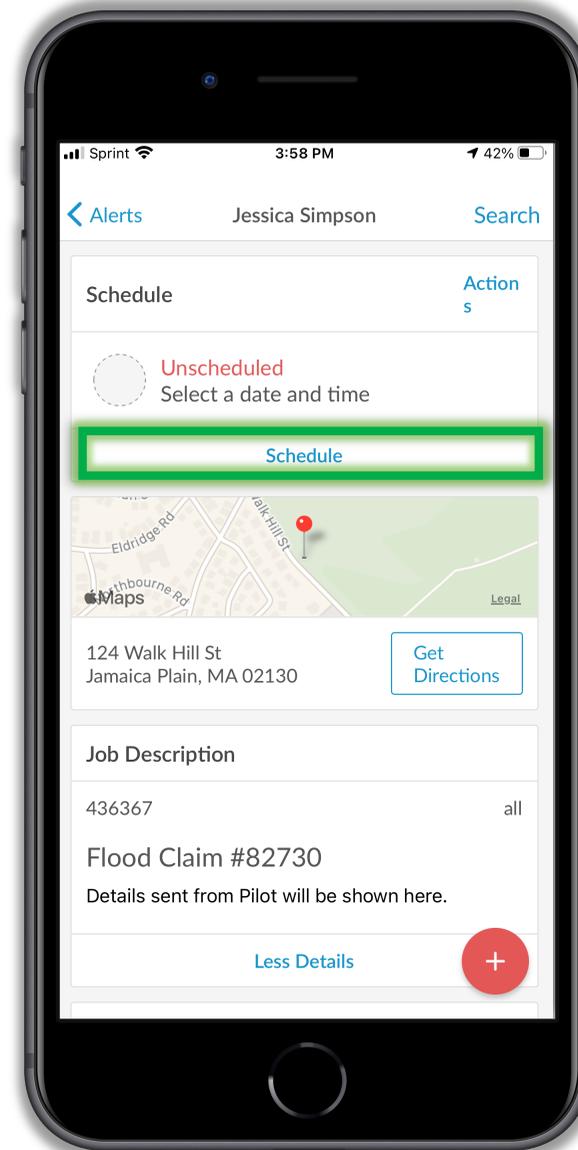
- Click 'Edit' to enter information once you've reached out to the insured for initial contact
- If indicated that there is PA/Attorney involvement, mark this on the form to disable notifications to the insured.
- Information entered will be sent to Pilot automatically through the Dispatch and Catalyst integration



Schedule in the App

Once you've established the appointment with the insured, schedule it in Dispatch.

- Select "Schedule" from the claim details page.
- Enter apt date, time, and arrival window duration
- Select 'Save Changes'

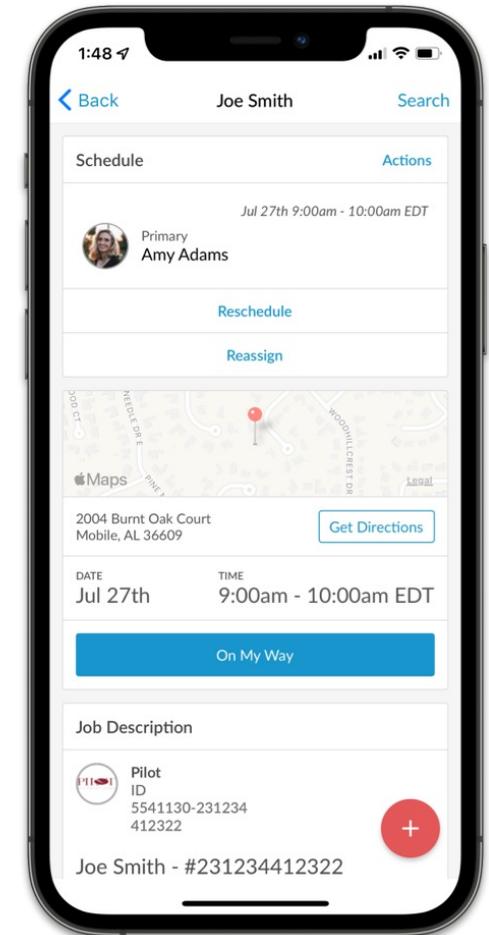
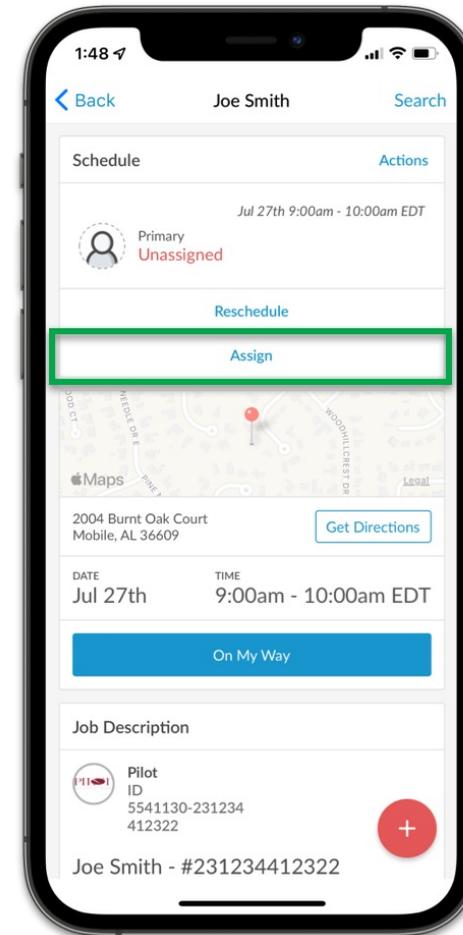
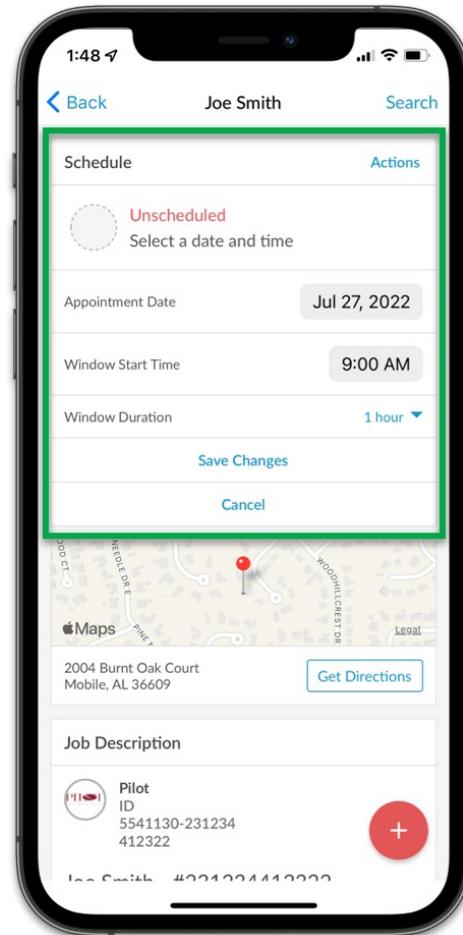


Assign the Appointment to Self in Mobile

After you schedule the appointment in Dispatch:

- Tap 'Assign'
- Tap on your name

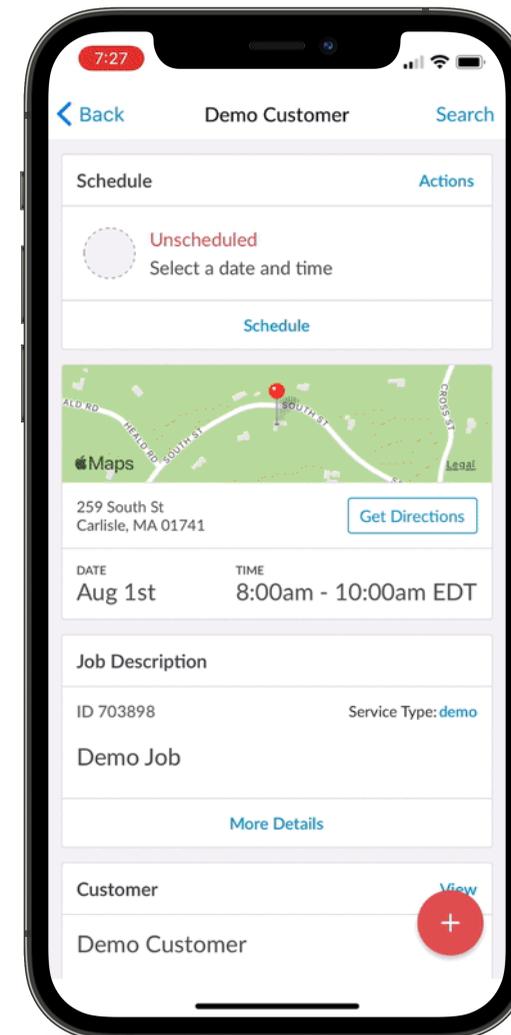
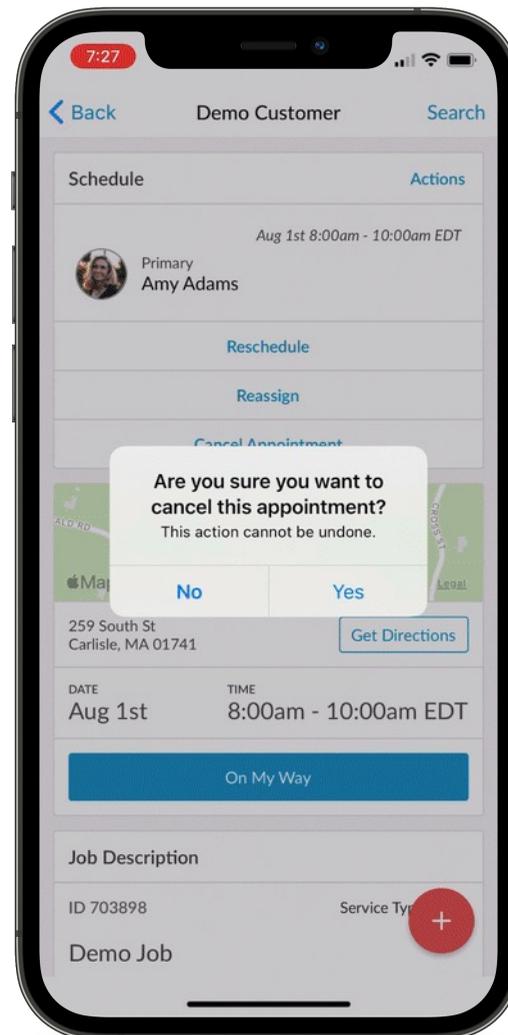
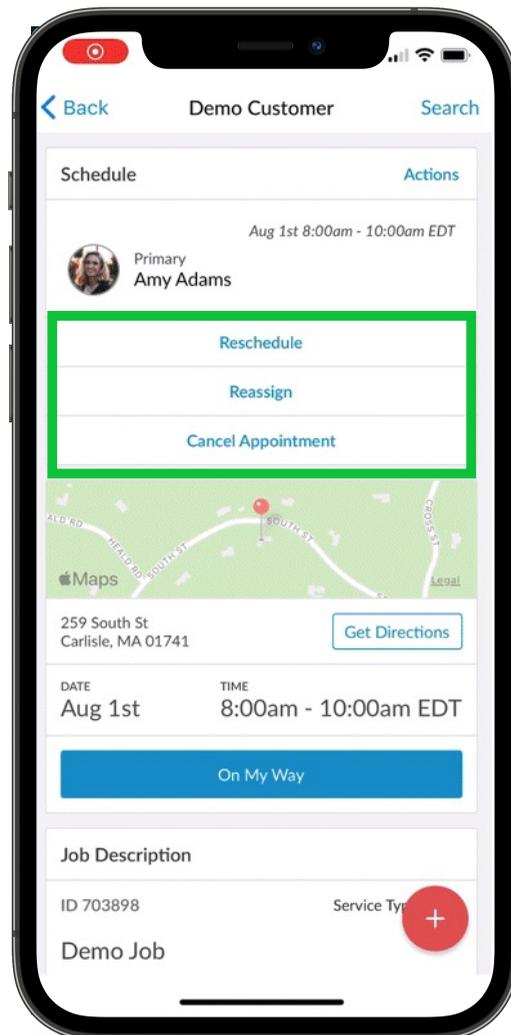
This step is important so that the insured will get automatic updates!



Need to Reschedule?

Tap 'Reschedule' to reschedule the appointment.

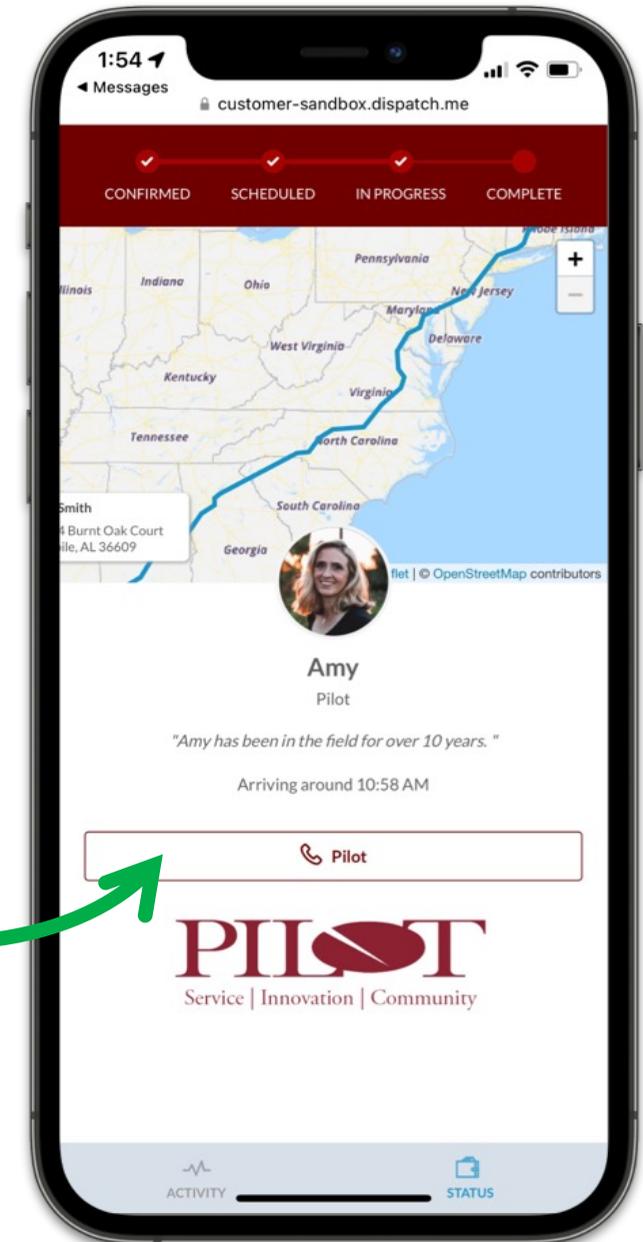
If you need to reschedule, but do not know the new appt date, tap 'Cancel Appointment' and the job status will go back to 'Unscheduled'.



Day of the Apt: Press “On My Way”

When you're ready to head over for the inspection, push the “On My Way” button to let the insured know!

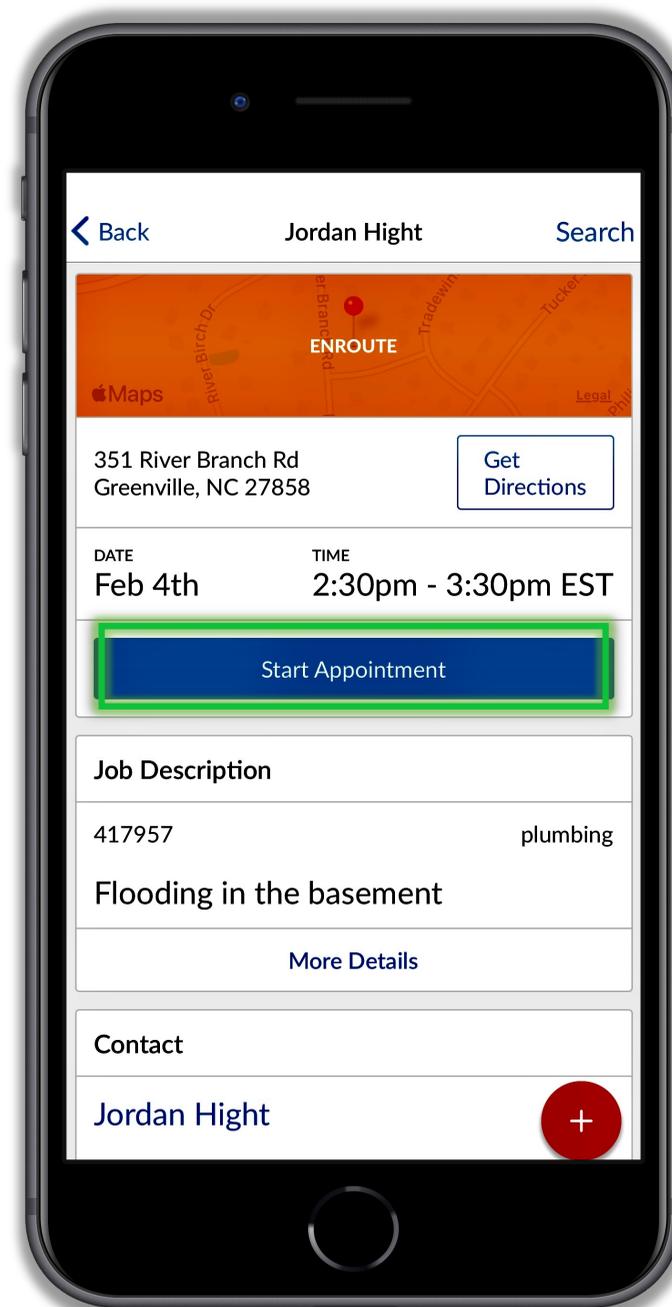
- The insured will be sent an email and SMS with a link to the status page
- Status page shows the route and a real-time ETA that takes traffic into account while you drive.
- The Insured can call if they have any special instructions or need to cancel
- Tracking shuts down as soon as you arrive and select ‘Start Appointment’



On-Site: Start Appointment

Once you arrive on-site, press the **Start Appointment** button and perform the inspection.

Add notes and photos to the claim, which will be sent back to Pilot.



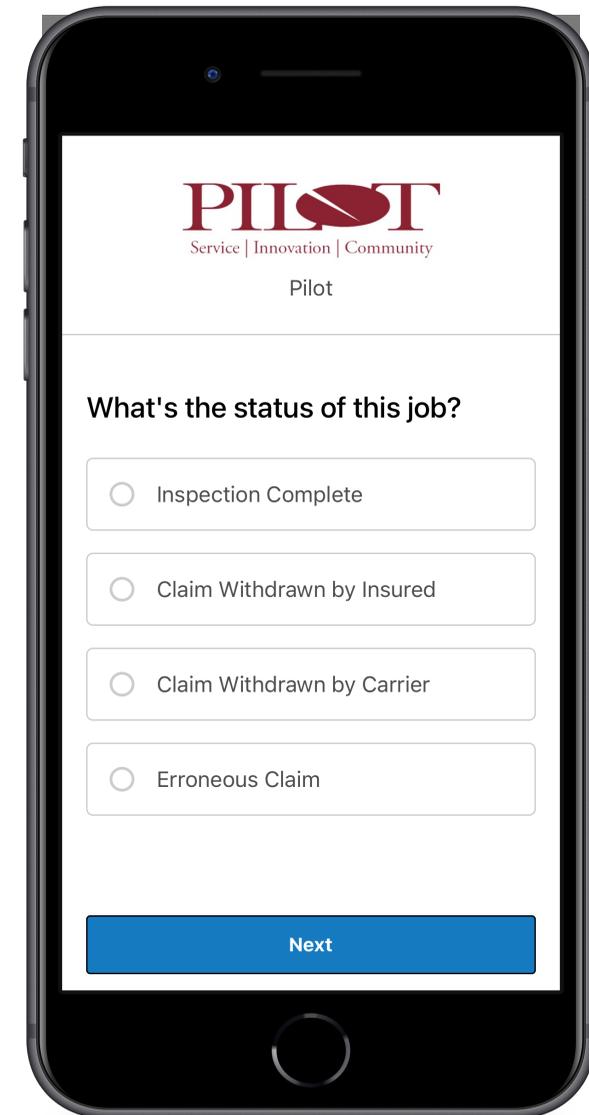
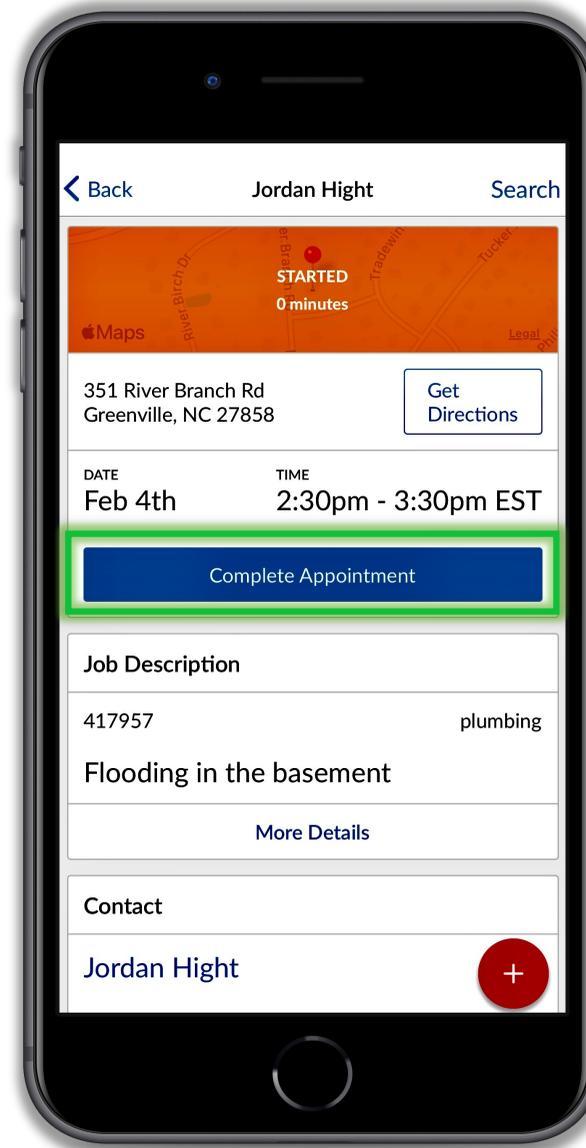
Complete Appointment Reason

When the appointment is over
Select Complete Appointment in Dispatch.

You will be shown the complete reasons:

- Inspection Complete
- Claim Withdrawn by Insured
- Claim Withdrawn by Carrier
- Erroneous Claim

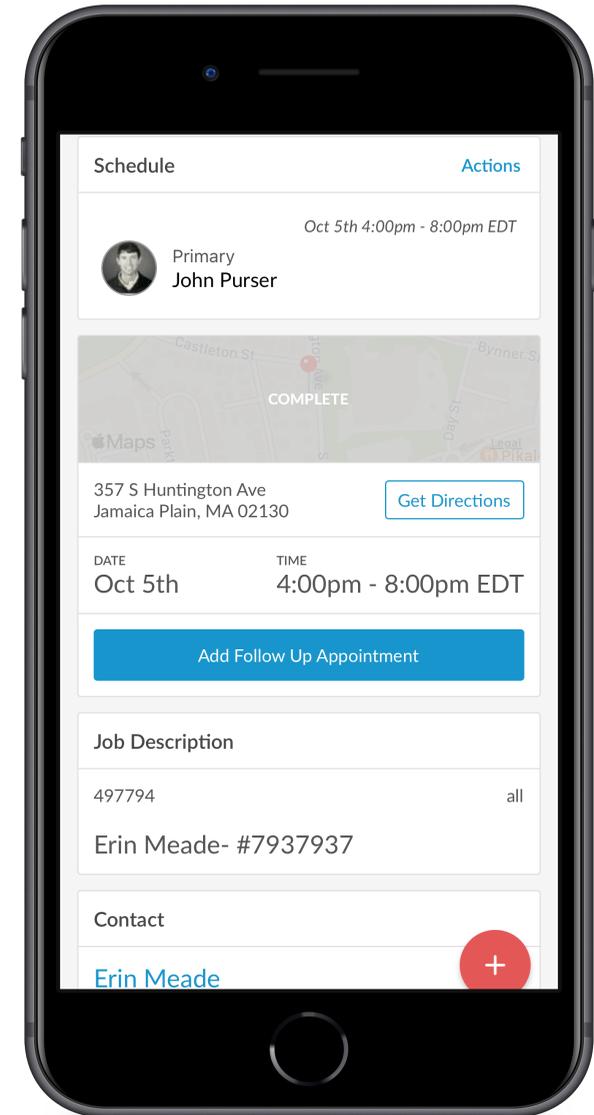
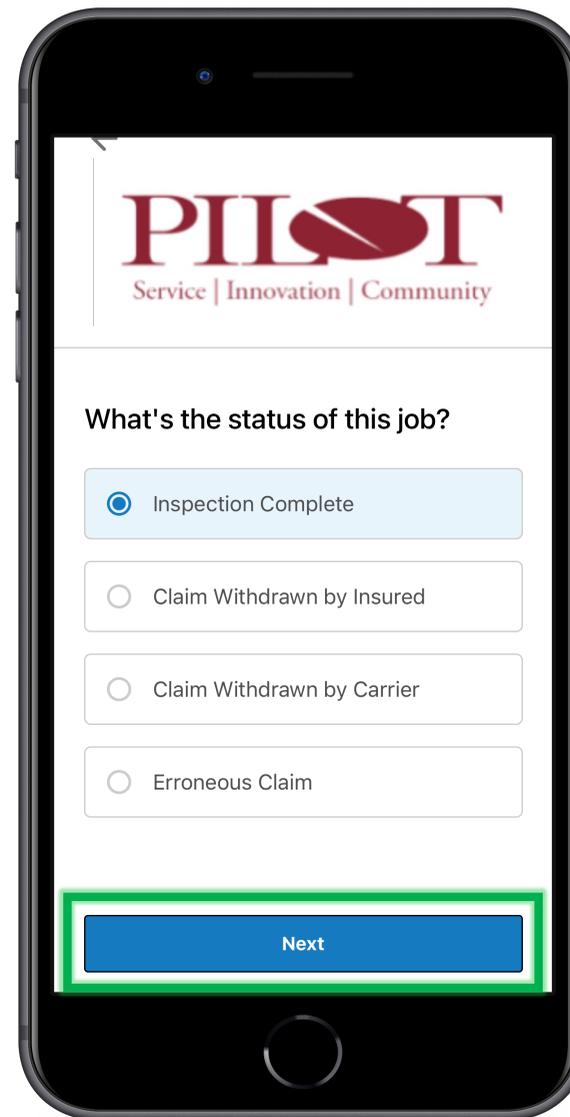
Select the reason which describes why
this **appointment** is over, then select 'Next'



Complete Status

After you select the reason that the appointment is over and then select 'Next'...

The appointment will now be marked as complete and shown in gray.



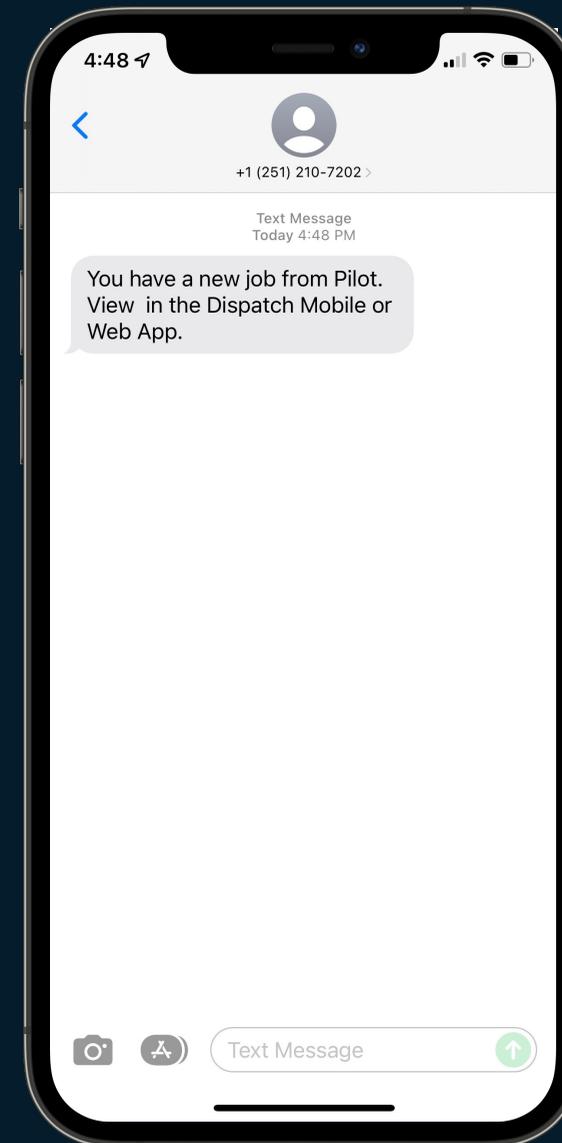
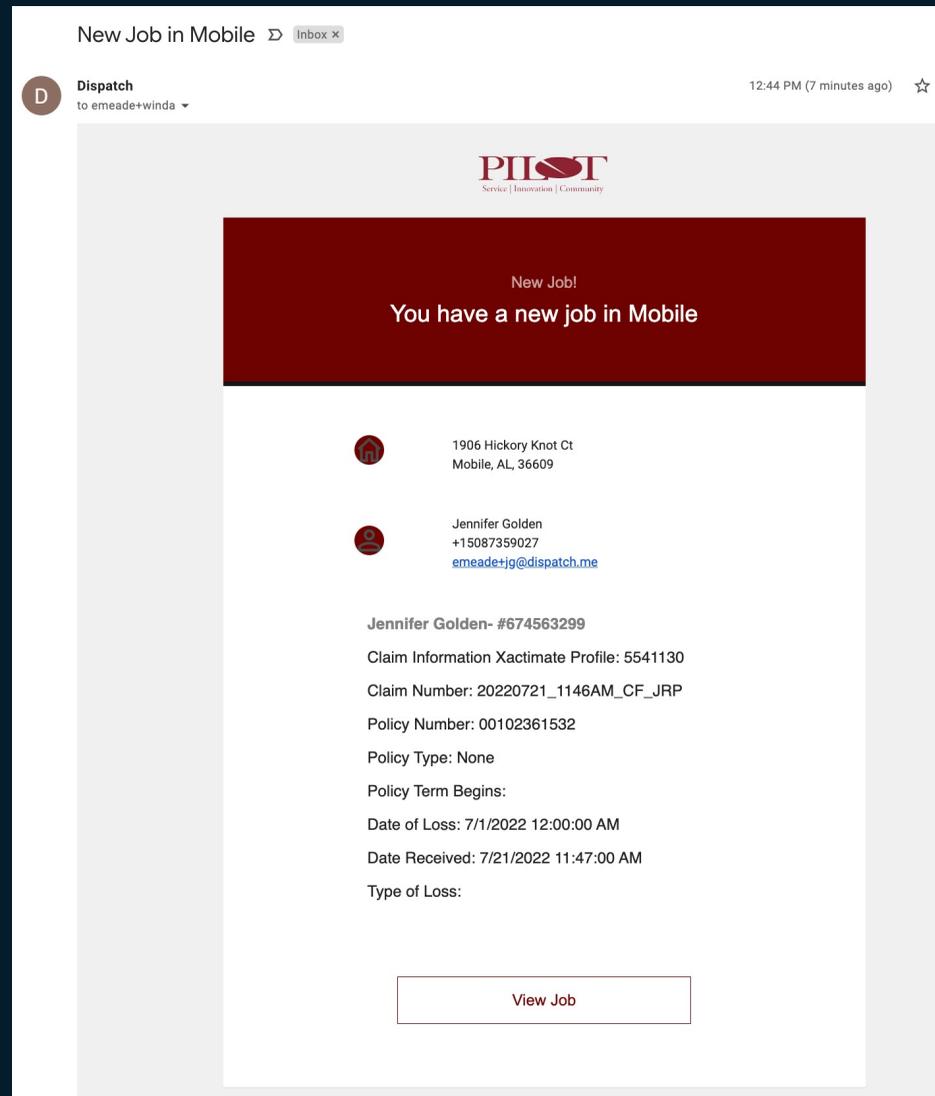


Pilot AOD Claims

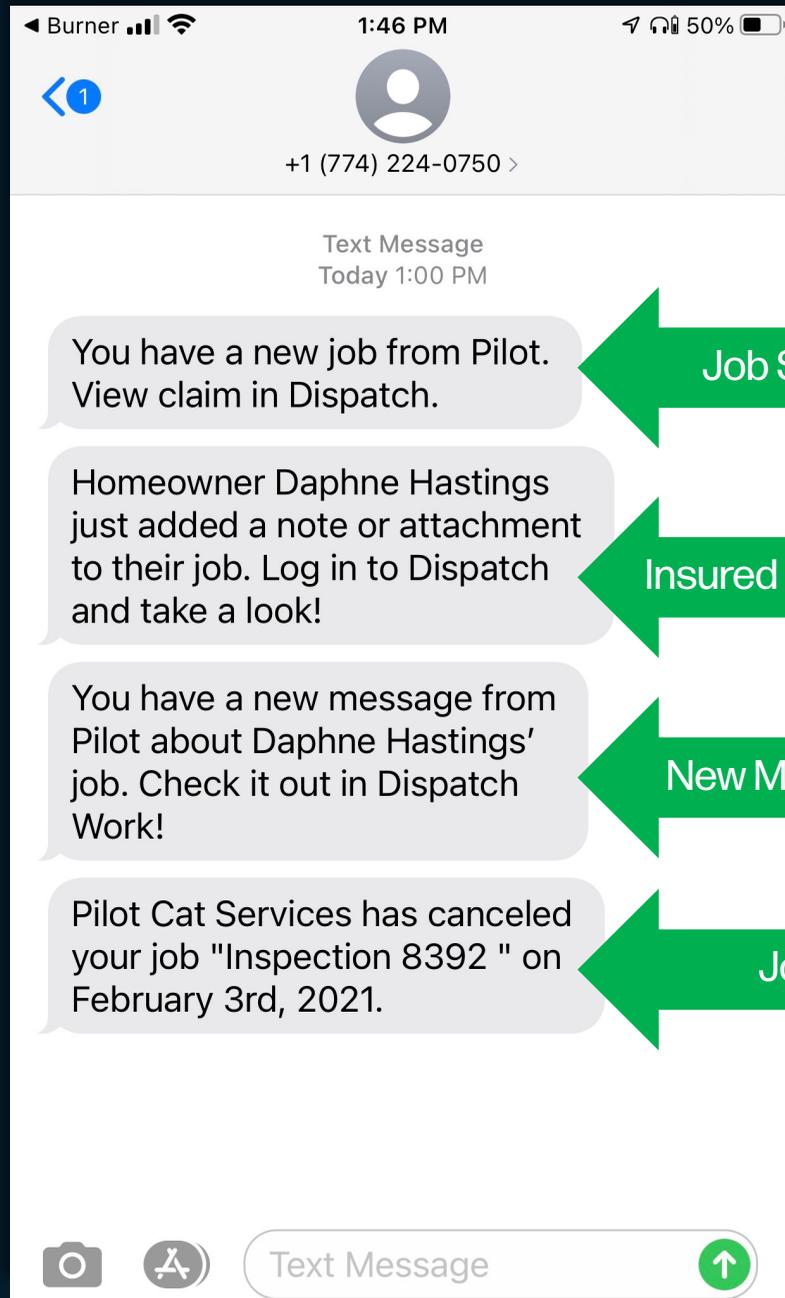
Adjuster Notifications

Adjuster is Assigned a new Claim from Pilot

After you have added your mobile number and contact email address



Adjuster Notifications

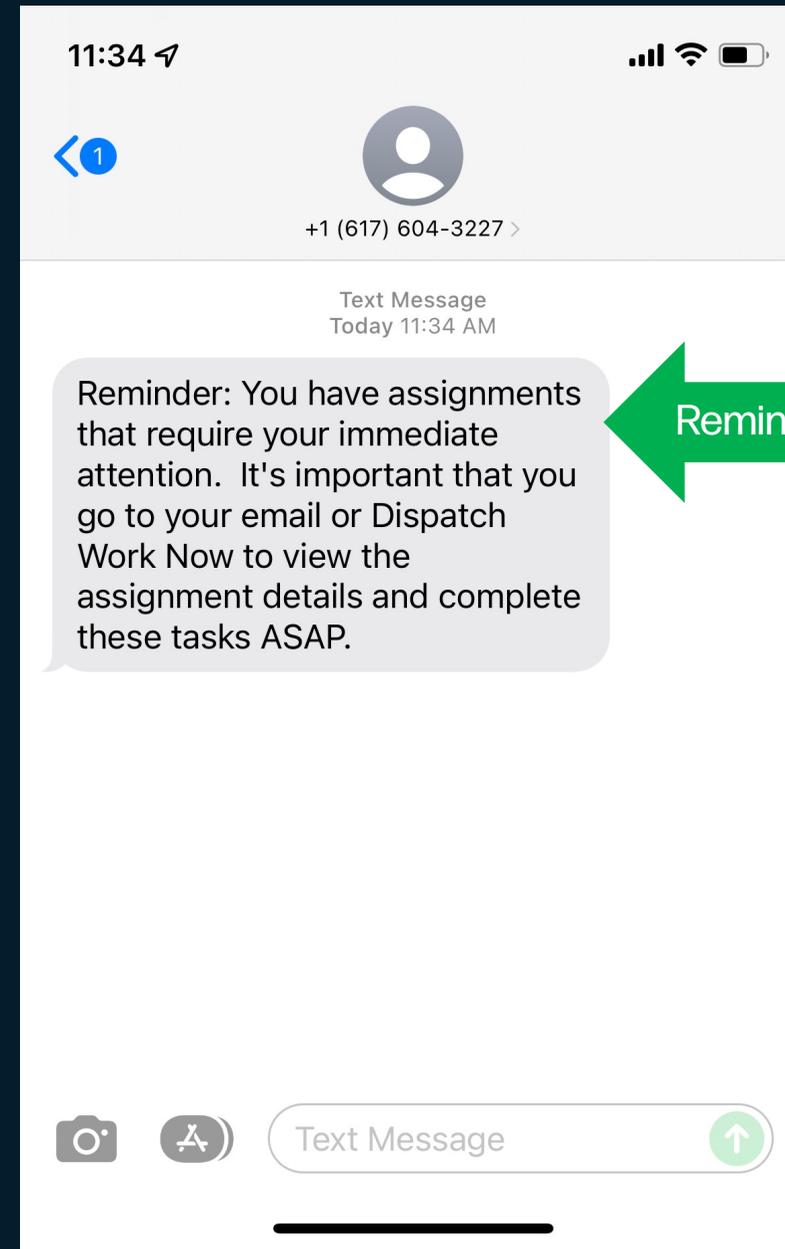


Job Sent to Adjuster

Insured adds photo or note

New Message from Pilot

Job Canceled



Reminder Sent to Adjuster

Automatic Reminder: 24+ hours and inspection has not been scheduled


Service | Innovation | Community

Reminder!

We are checking in on your job from Pilot.

Jake Tully -
#20220721_1146AM_CF_JRP

 8050 Live Oak Cir N
Theodore, AL

 Jake Tully
+12512071064
jpurser@gmail.com

Yes, I have scheduled this job!

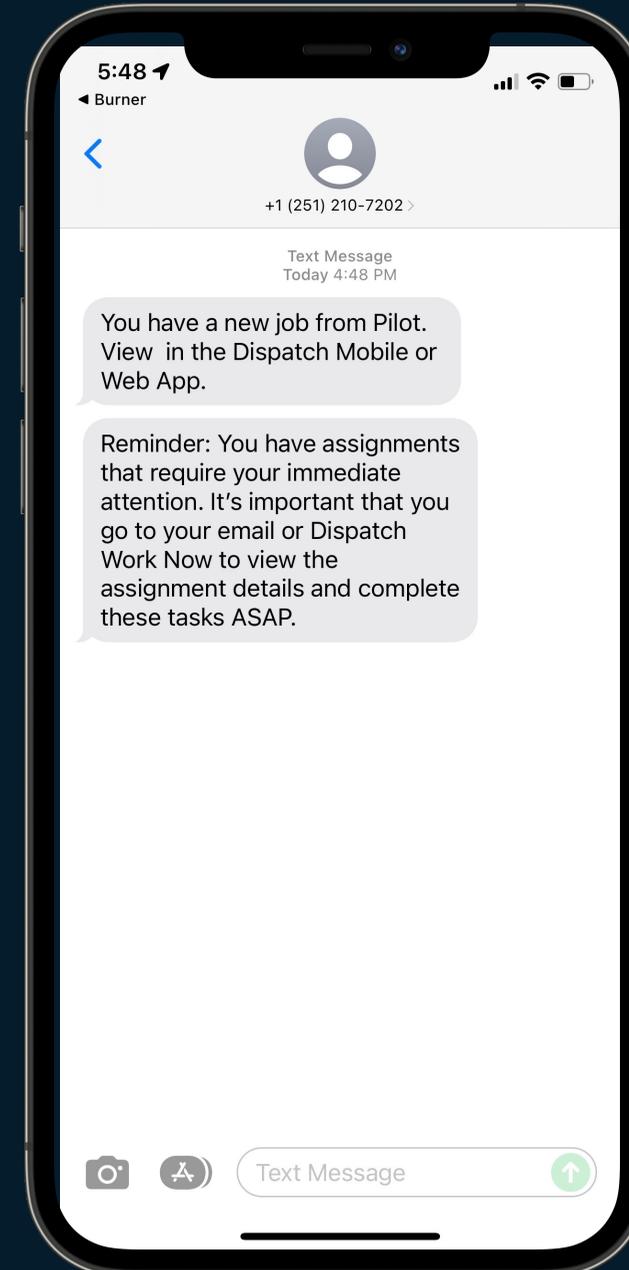
I still need to schedule

I'm waiting on approval/parts

This job is complete

View Job

All Together Now





Pilot AOD Claims

Adjuster Notifications

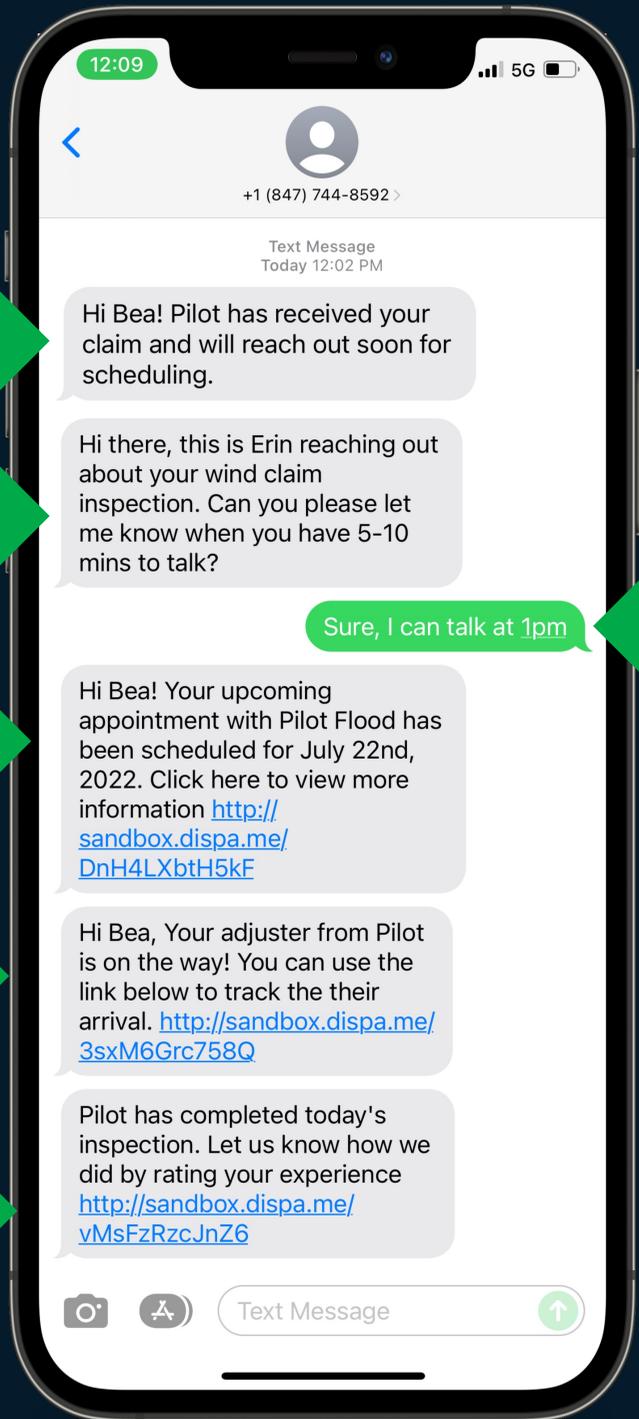
Claim Sent to Adjuster

Adjuster sends inbox message

Adjuster Schedules in Dispatch

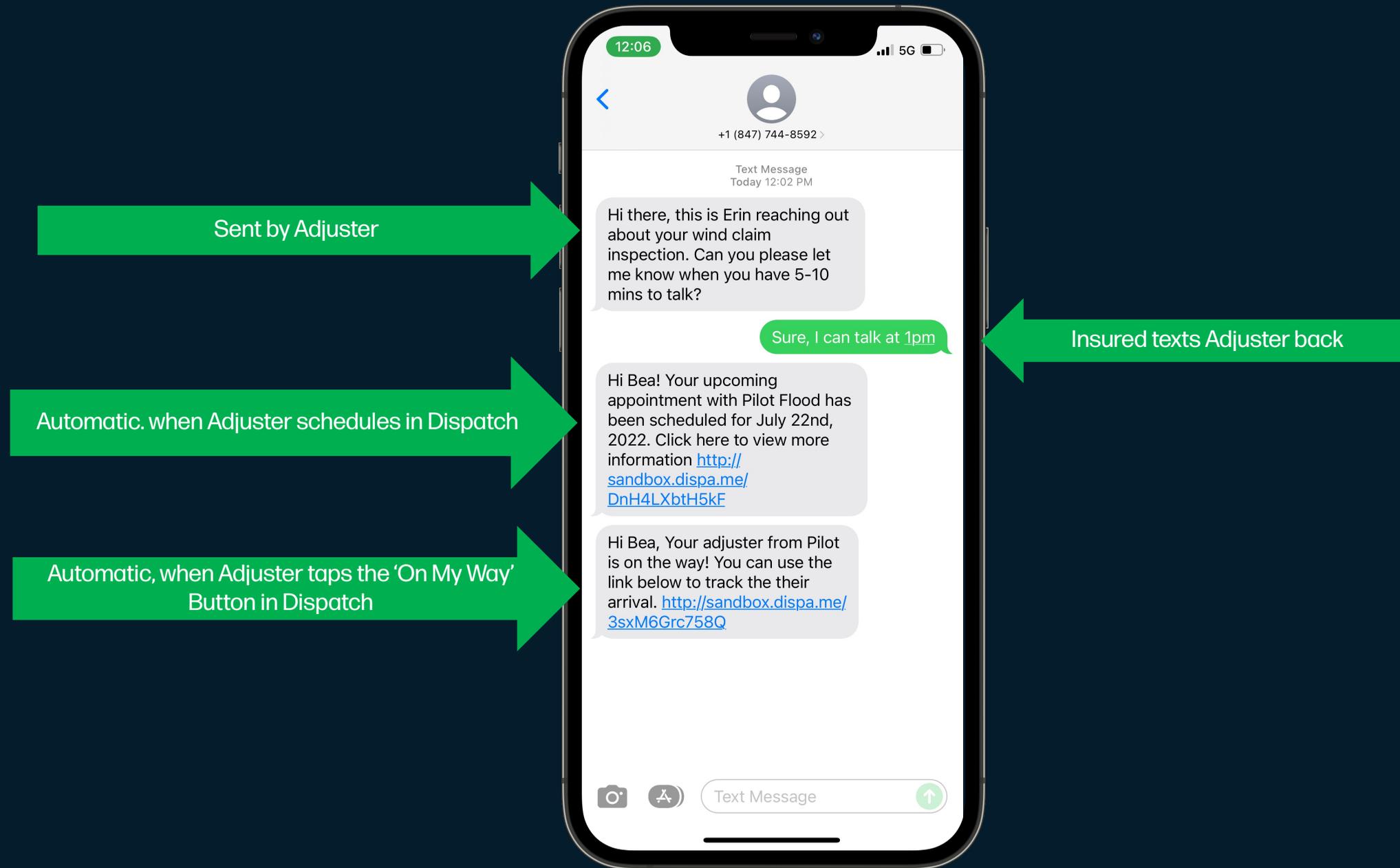
Adjuster taps the 'On My Way' button

Adjuster taps 'Inspection Complete'



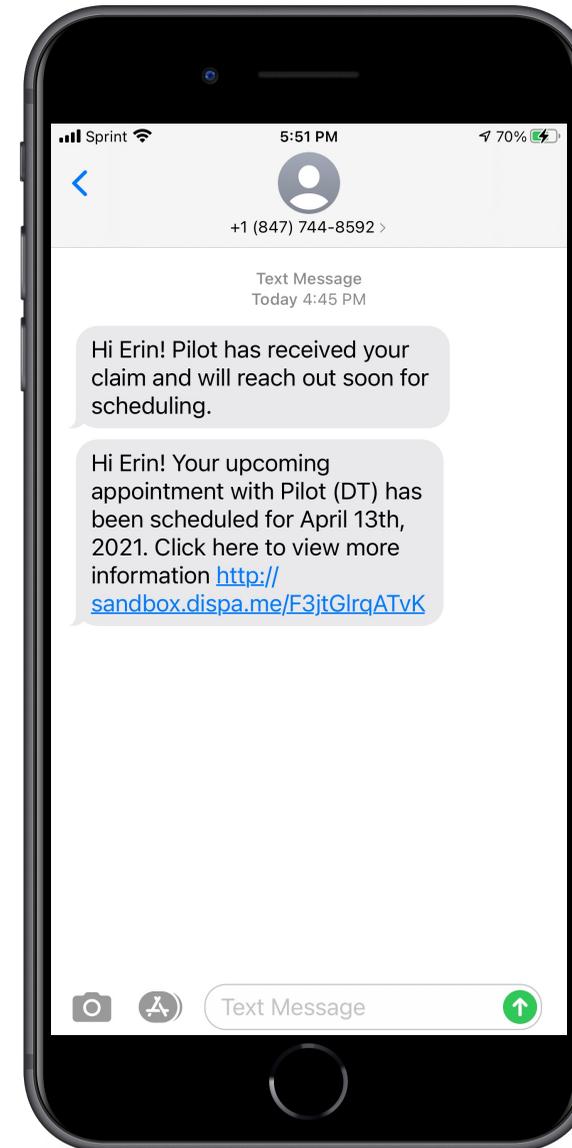
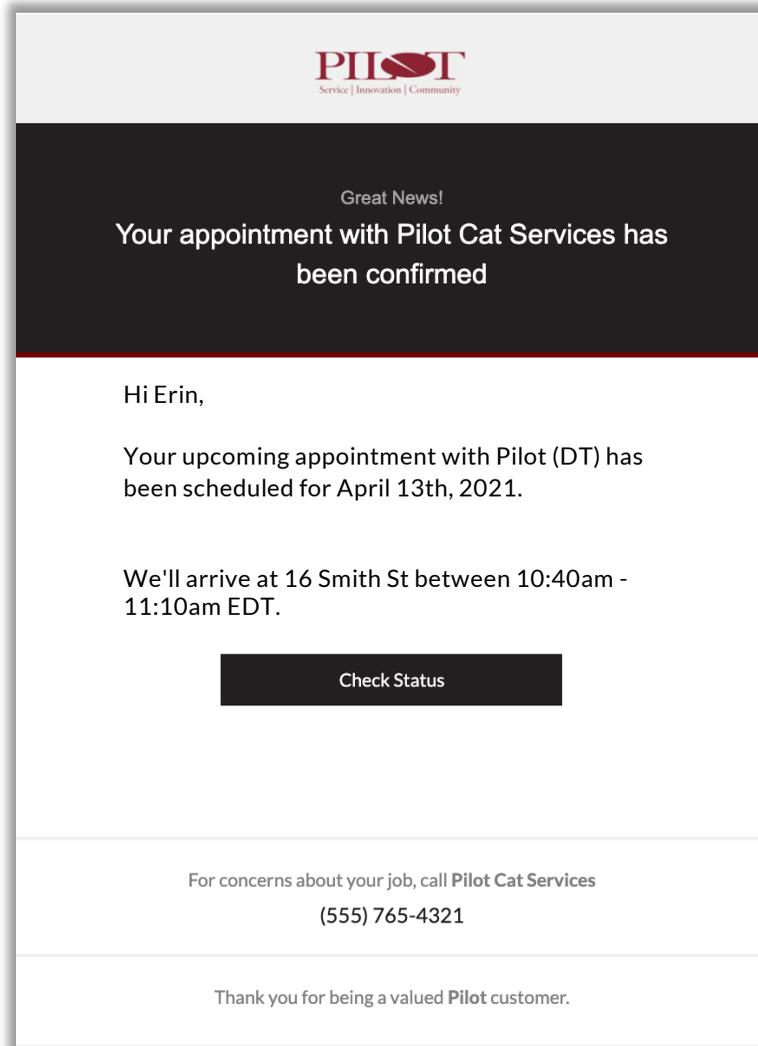
Insured replies via text

Insured Messages (inbox included)

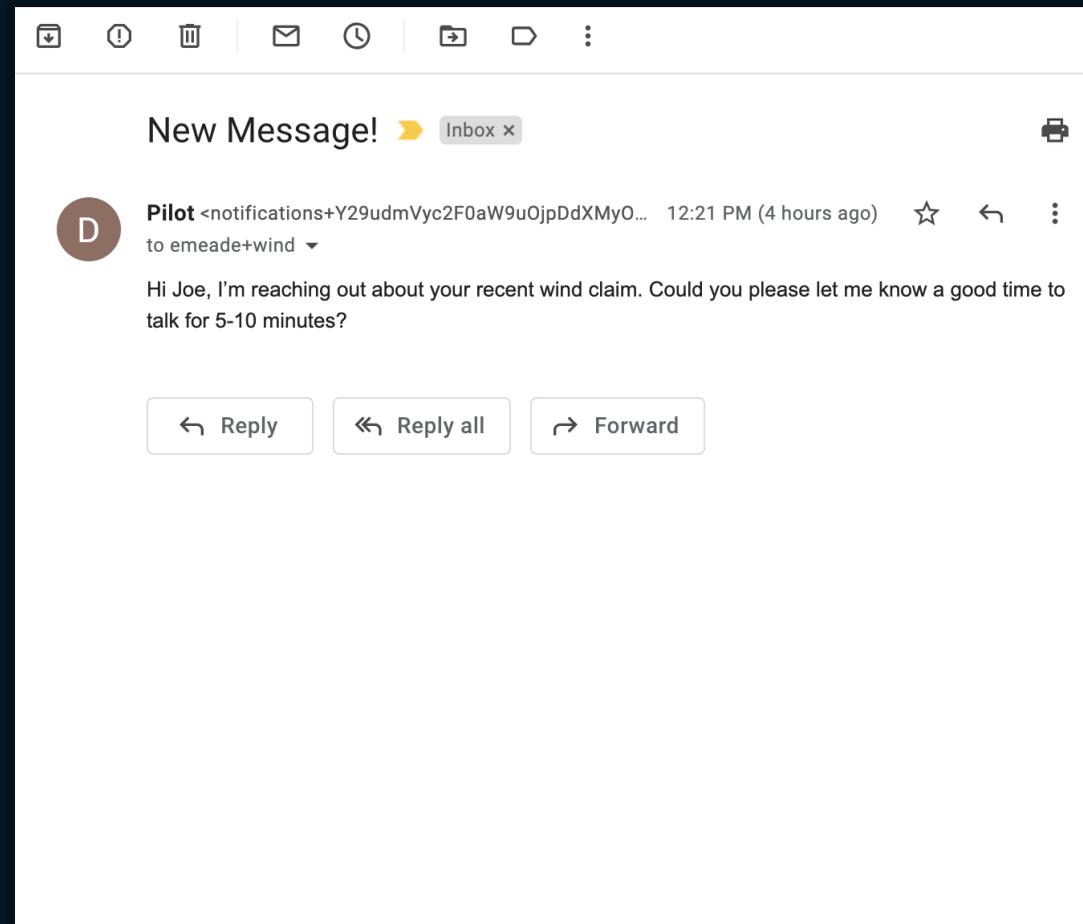


Auto Confirmation → The Insured

Email and SMS Notifications

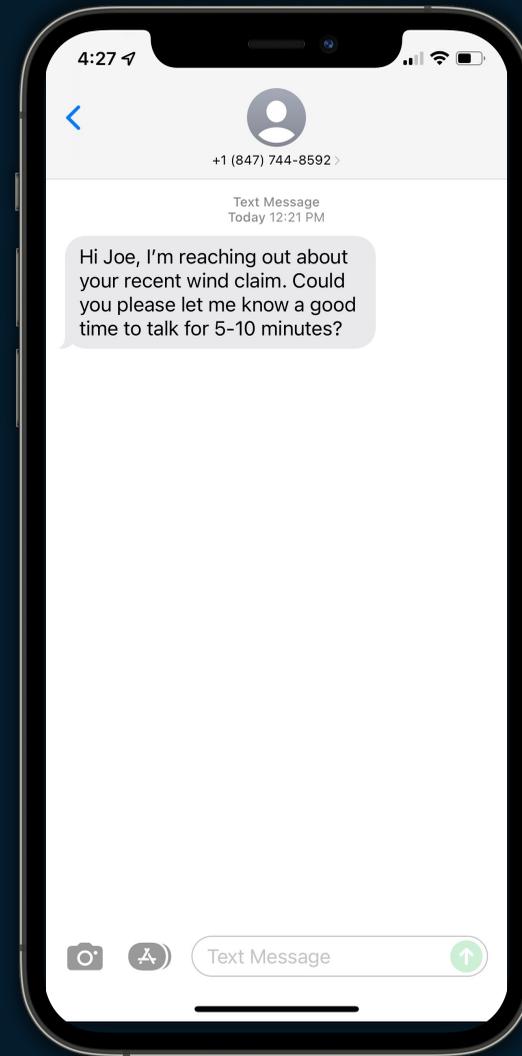


Adjuster Sends Inbox Message to the Insured



Email

(When there is an email address for the insured)



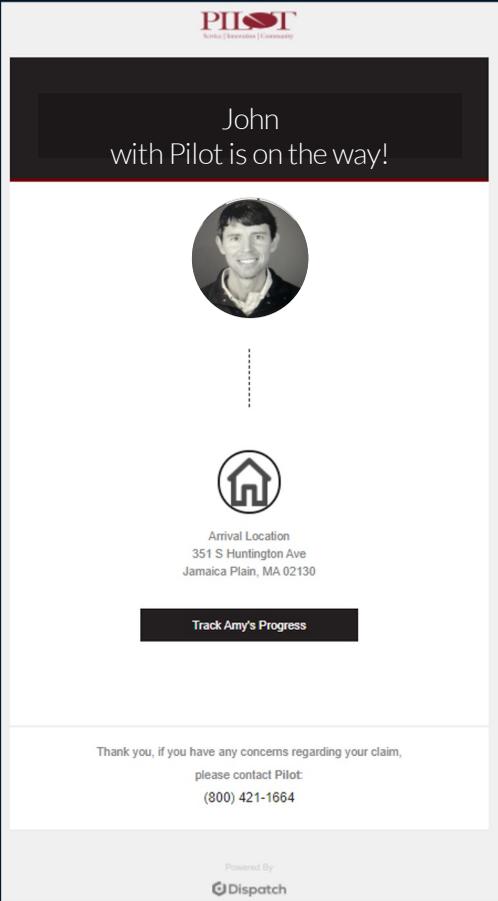
Text Message

(When there is a mobile number for the insured)

Adjuster pushes 'On My Way' button

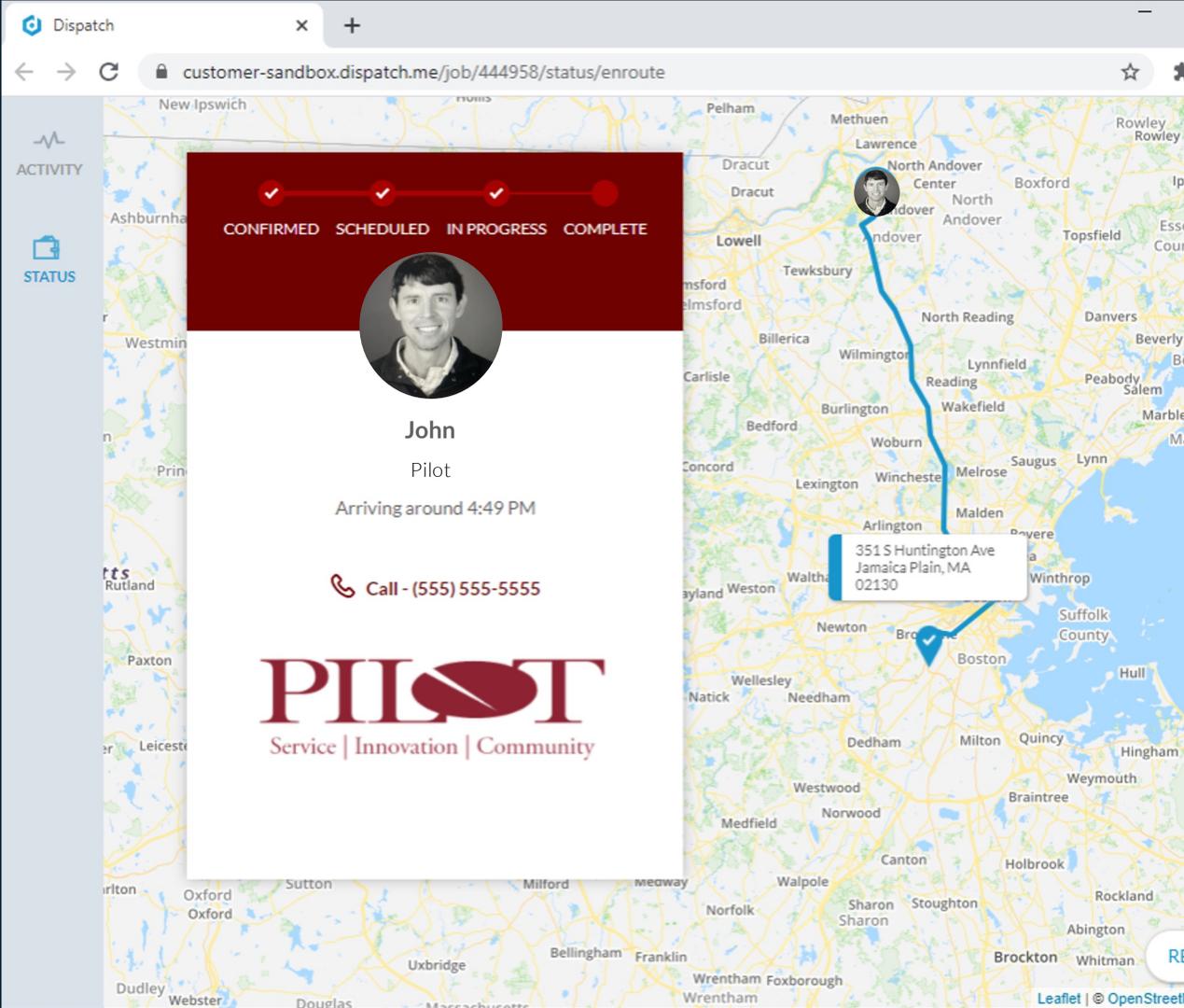
Hi Erin, Your adjuster from Pilot is on the way! You can use the link below to track their arrival. <http://sandbox.dispa.me/ea9PpQEDH0GN>

Text Message



The email notification features the Pilot logo at the top. Below it, a dark banner contains the text "John with Pilot is on the way!". A circular profile picture of John follows. A vertical dotted line separates the profile from the arrival location details: a house icon, the text "Arrival Location 351 S Huntington Ave Jamaica Plain, MA 02130", and a "Track Amy's Progress" button. At the bottom, there is a thank you message and contact information for Pilot: "Thank you, if you have any concerns regarding your claim, please contact Pilot: (800) 421-1664". The Dispatch logo is at the very bottom.

Email



The map view shows a browser window with the URL "customer-sandbox.dispatch.me/job/444958/status/enroute". A sidebar on the left has "ACTIVITY" and "STATUS" options. The main map area displays a route from Andover, MA to Boston, MA. A red progress bar at the top of the map overlay shows four stages: "CONFIRMED", "SCHEDULED", "IN PROGRESS", and "COMPLETE", with the first three marked with checkmarks. Below the progress bar is a circular profile picture of John, his name "John Pilot", and the text "Arriving around 4:49 PM". A call icon and number "Call - (555) 555-5555" are also present. The Pilot logo and tagline "Service | Innovation | Community" are at the bottom of the overlay. A tooltip on the map shows the arrival location: "351 S Huntington Ave Jamaica Plain, MA 02130".

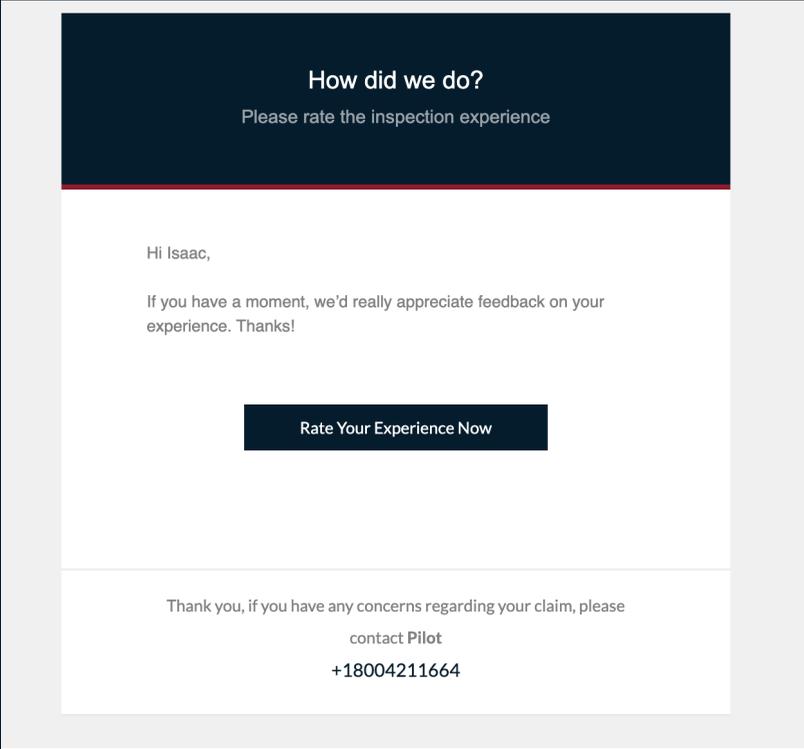
Map view with Adjuster's real-time ETA

Adjuster pushes 'Appointment Completed' button

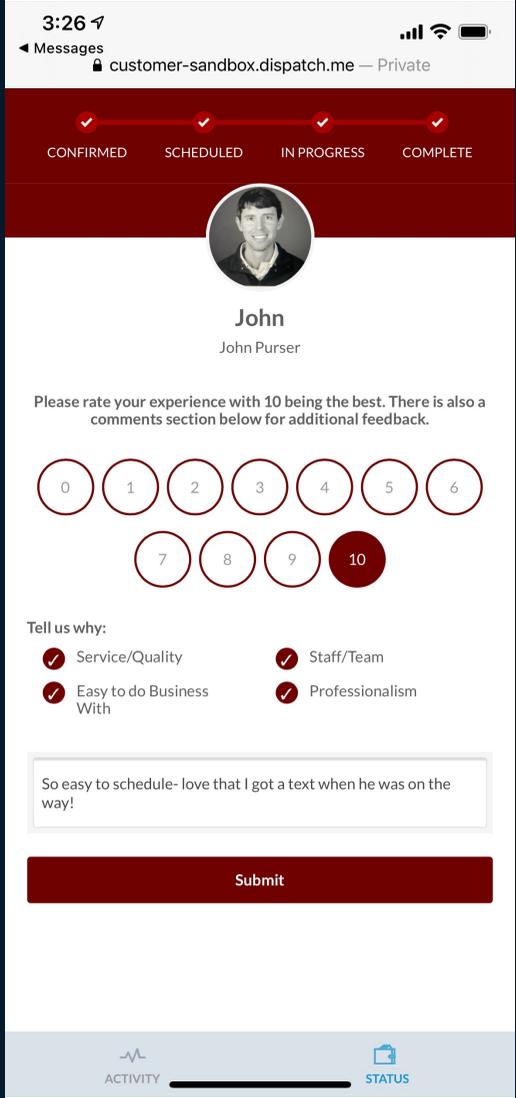
(Reason= Inspection Completed)

Pilot has completed today's inspection. Let us know how we did by rating your experience <http://sandbox.dispa.me/CI9P0aPDXSYs>

Text Message



Email



Survey for the Insured

Additional Resources

Pilot & Dispatch Training Homepage

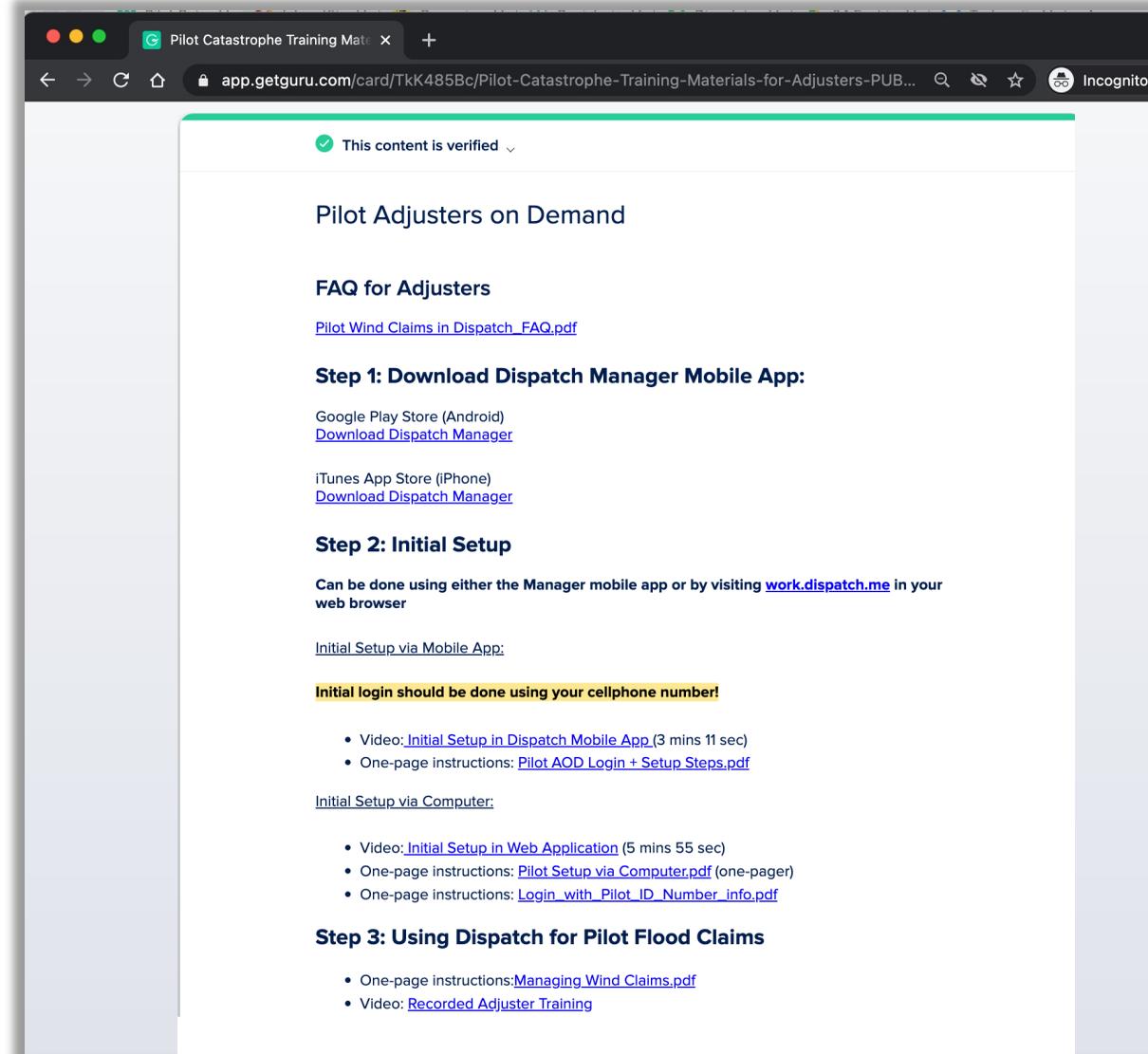
Adjusters can check out the public training card to view custom training content made specifically for Pilot AOD.

Content Includes:

- Links to Download the Mobile App
- Step-by-Step Workflow Guide
- One-Pager for Initial Setup
- Video Demonstrations



[...preview here](#)



The screenshot shows a web browser window displaying the 'Pilot Catastrophe Training Materials' page. The page is titled 'Pilot Catastrophe Training Materials for Adjusters - PUB...' and is verified. The content includes:

- Pilot Adjusters on Demand**
- FAQ for Adjusters**
 - [Pilot Wind Claims in Dispatch_FAQ.pdf](#)
- Step 1: Download Dispatch Manager Mobile App:**
 - Google Play Store (Android) [Download Dispatch Manager](#)
 - iTunes App Store (iPhone) [Download Dispatch Manager](#)
- Step 2: Initial Setup**

Can be done using either the Manager mobile app or by visiting [work.dispatch.me](#) in your web browser

Initial Setup via Mobile App:

Initial login should be done using your cellphone number!

 - Video: [Initial Setup in Dispatch Mobile App](#) (3 mins 11 sec)
 - One-page instructions: [Pilot AOD Login + Setup Steps.pdf](#)

Initial Setup via Computer:

 - Video: [Initial Setup in Web Application](#) (5 mins 55 sec)
 - One-page instructions: [Pilot Setup via Computer.pdf](#) (one-pager)
 - One-page instructions: [Login with Pilot ID Number info.pdf](#)
- Step 3: Using Dispatch for Pilot Flood Claims**
 - One-page instructions: [Managing Wind Claims.pdf](#)
 - Video: [Recorded Adjuster Training](#)

Technical Support & Training

Trouble logging in?

Virtual Claim Support

virtualclaimssupport@pilotcat.com

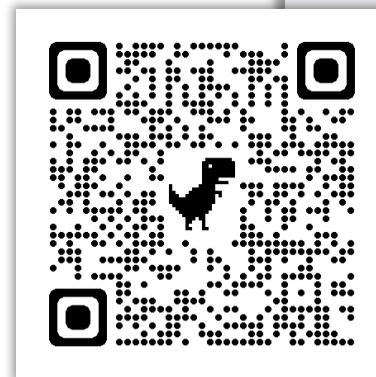
Text Support: 251-551-5195

Questions about the App?

Dispatch Support

Support@dispatch.me

9am -6pm ET



A screenshot of a web browser window showing a page titled "Pilot Adjusters on Demand". The page content includes a "FAQ for Adjusters" section with a link to "Pilot Wind Claims in Dispatch_FAQ.pdf". It then details "Step 1: Download Dispatch Manager Mobile App:" with links for Google Play Store (Android) and iTunes App Store (iPhone). "Step 2: Initial Setup" explains that it can be done via the mobile app or a web browser, providing links for "Initial Setup via Mobile App:" and "Initial Setup via Computer:". It also includes a note that "Initial login should be done using your cellphone number!" and lists video and PDF instructions for both mobile and computer setup. "Step 3: Using Dispatch for Pilot Flood Claims" includes links for "Managing Wind Claims.pdf" and "Recorded Adjuster Training".



Pilot AOD



Scan the QR Code for additional training resources

Or [click here](#)