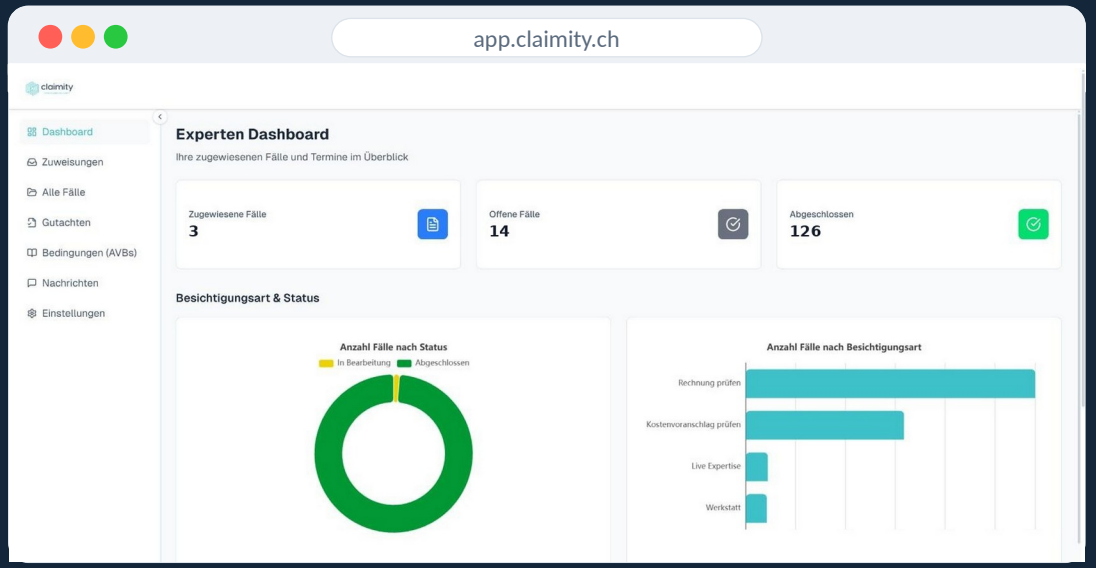
claimity
WHERE CLAIMS FIND CLARITY

Claimity for experts

Guide to the app.claimity.ch platform



Vehicle appraisal · Loss adjusters · Fraud investigation

As of October 2026 · screenshots show the German interface

OVERVIEW

Your process in four steps

Every case follows the same steps on the platform, regardless of the client.

01

Accept the case

Menu «Assignments», check the case and «Accept» or decline with a reason.

02

Process the case

Menu «All cases», «Show details», set the responsible person.

03

Submit report

Tab «Reports»: upload files and «Submit report».

04

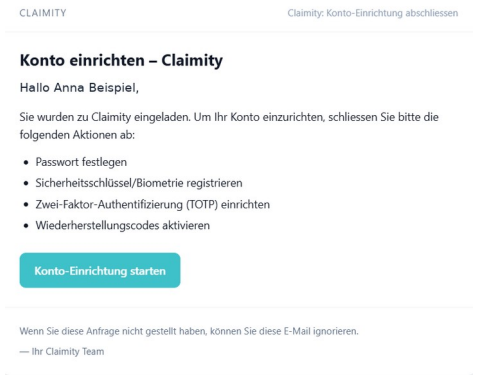
Enter the invoice

Tab «Invoice»: one invoice per case with amount, number, due date and PDF.

In parallel at any time: Questions directly in the case via the «Messages» tab, either with the insurer or with Claimity.

First registration

You will receive an invitation by email. Setup takes about five minutes.



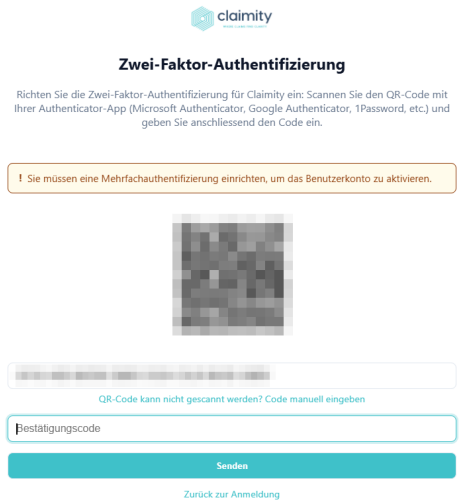
1 Open the invitation

Email from noreply@claimity.ch, button «Start account setup».



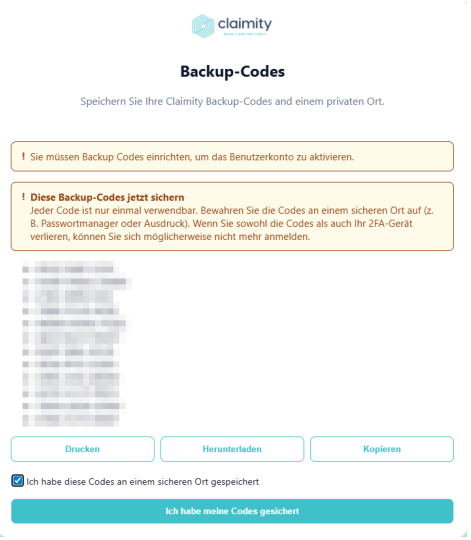
2 Set password

At least 12 characters with a digit, upper and lower case letters and a special character.



3 Set up 2FA

Scan the QR code with an authenticator app and enter the code.



4 Save backup codes

Store safely, tick the box, «I have saved my codes».

Sign in and reset your password

Sign in is always protected by a second factor.

1 Enter credentials

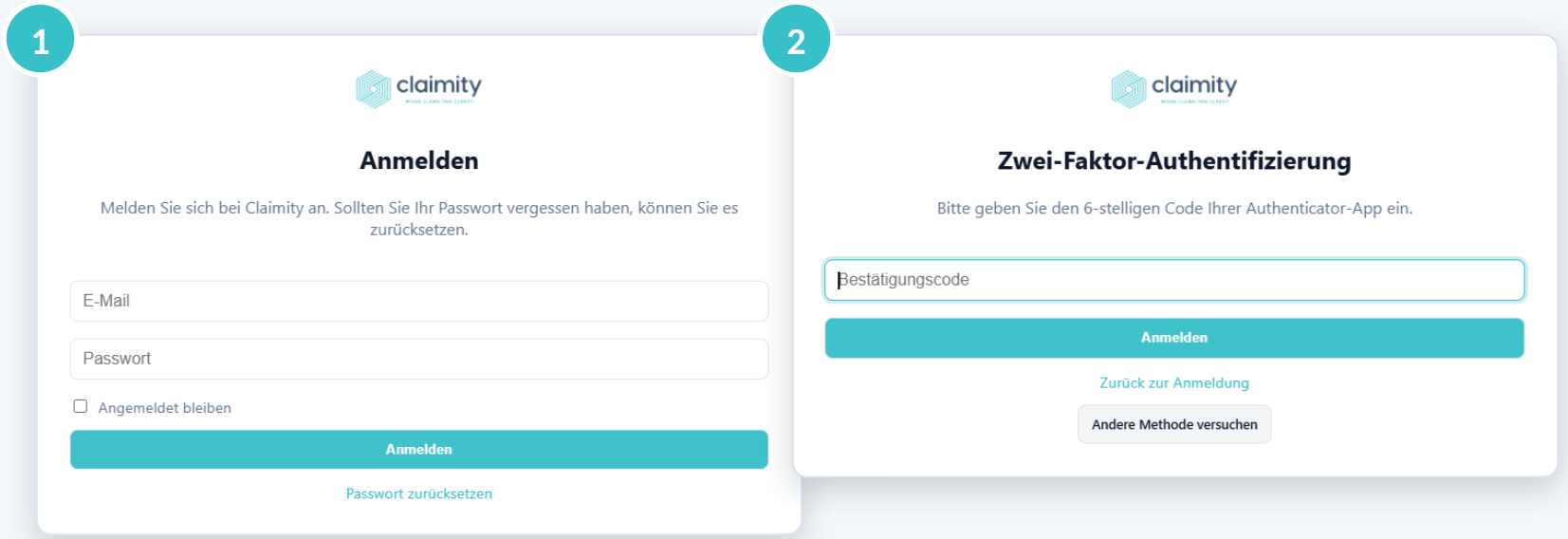
On app.claimity.ch, enter your email address and password and click «Sign in».

2 Confirm the code

Enter the six digit code from the authenticator app and confirm.

3 Forgot password

In the sign in form choose «Reset password». Without the app, a backup code helps via «Try another method».



Tip: only enable «Stay signed in» on your own protected device.

Complete your profile

Click your own name at the bottom left of the navigation.

1 Phone number

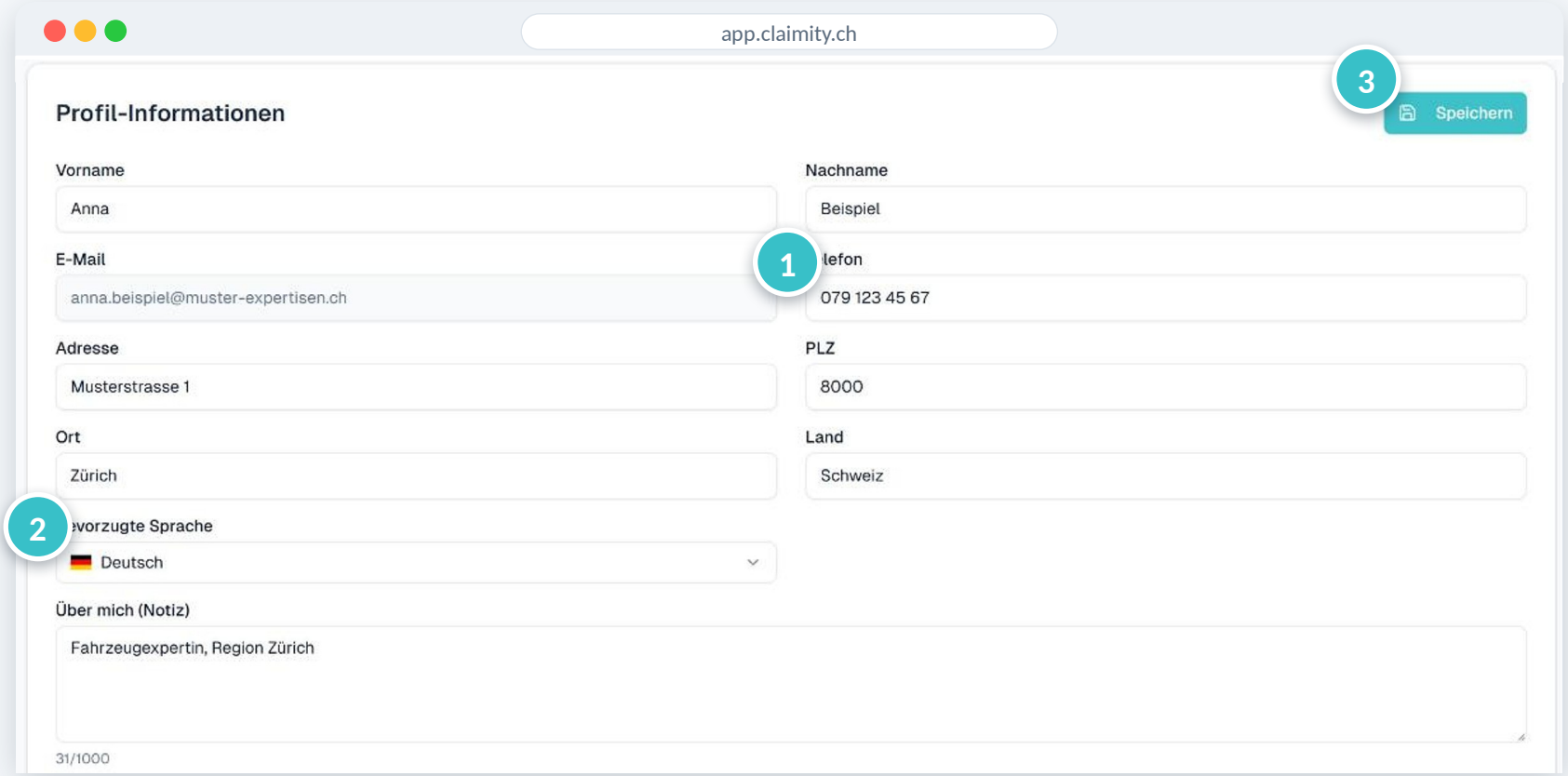
So that the insurer and Claimity can reach you directly with questions.

2 Preferred language

Determines the language of all emails you receive from Claimity.

3 «Save»

Changes are only saved with this button.



The portal at a glance

The navigation on the left is the same on every page.

1 **Dashboard**
Key figures on your cases.

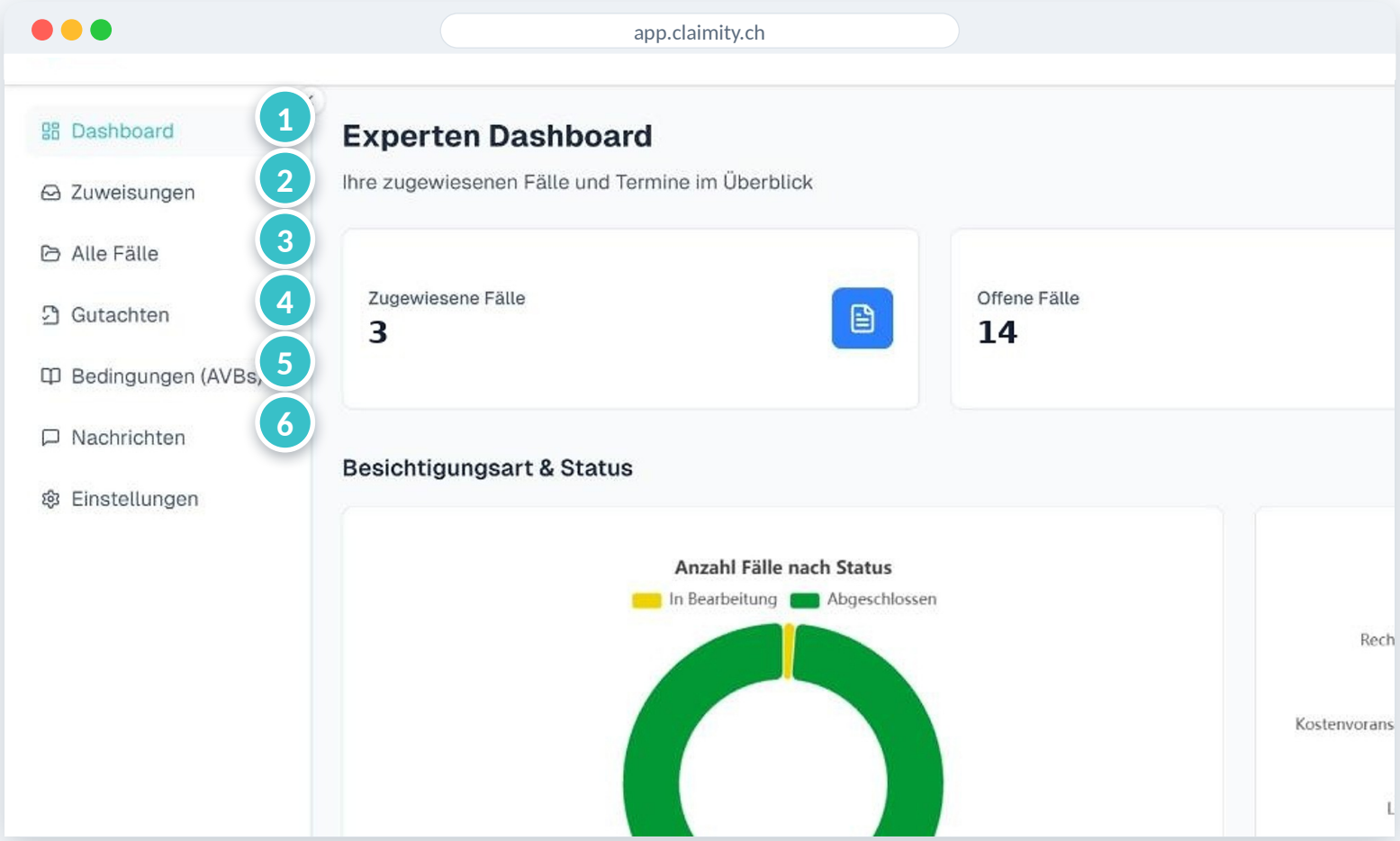
2 **Assignments**
Accept or decline new cases.

3 **All cases**
Your cases in progress.

4 **Reports**
Submitted reports with status.

5 **Terms (policy terms)**
Look up the policy terms of each insurer.

6 **Messages, settings**
Messages and administration.



01

Process cases

From assignment to invoice

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STEP 1

Accept an assignment

New cases appear under «Assignments». The notification goes to your organisation's email address.

1 Open «Assignments»

The number in the menu shows how many requests are open.

2 Select the case

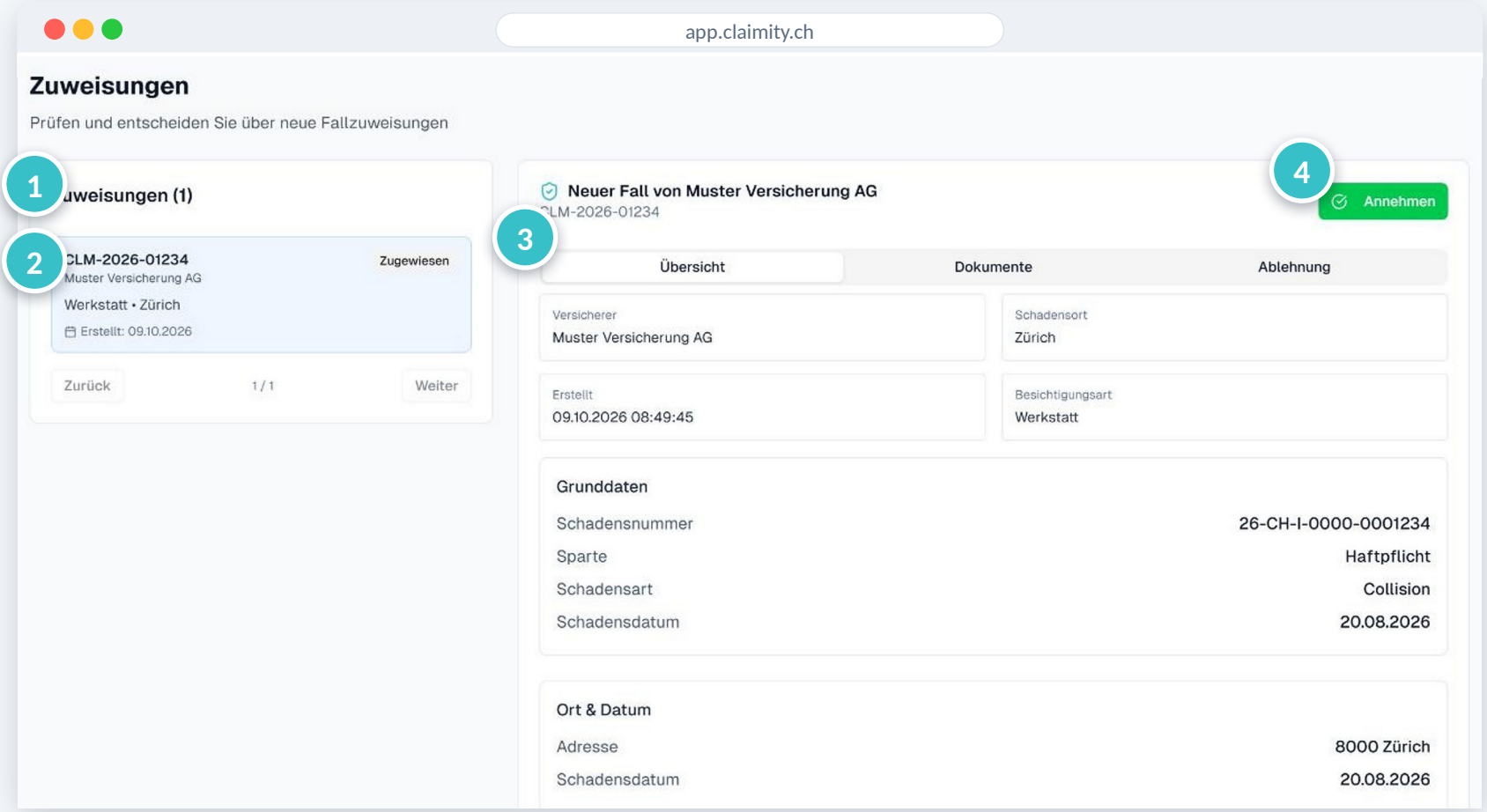
Insurer, inspection type and location at a glance.

3 Review details

The «Overview» and «Documents» tabs show loss data and documents.

4 «Accept»

The case moves to «All cases» and is ready to be processed.



STEP 1

Decline an assignment

When capacity, region or specialist field do not fit.

1 Tab «Decline»

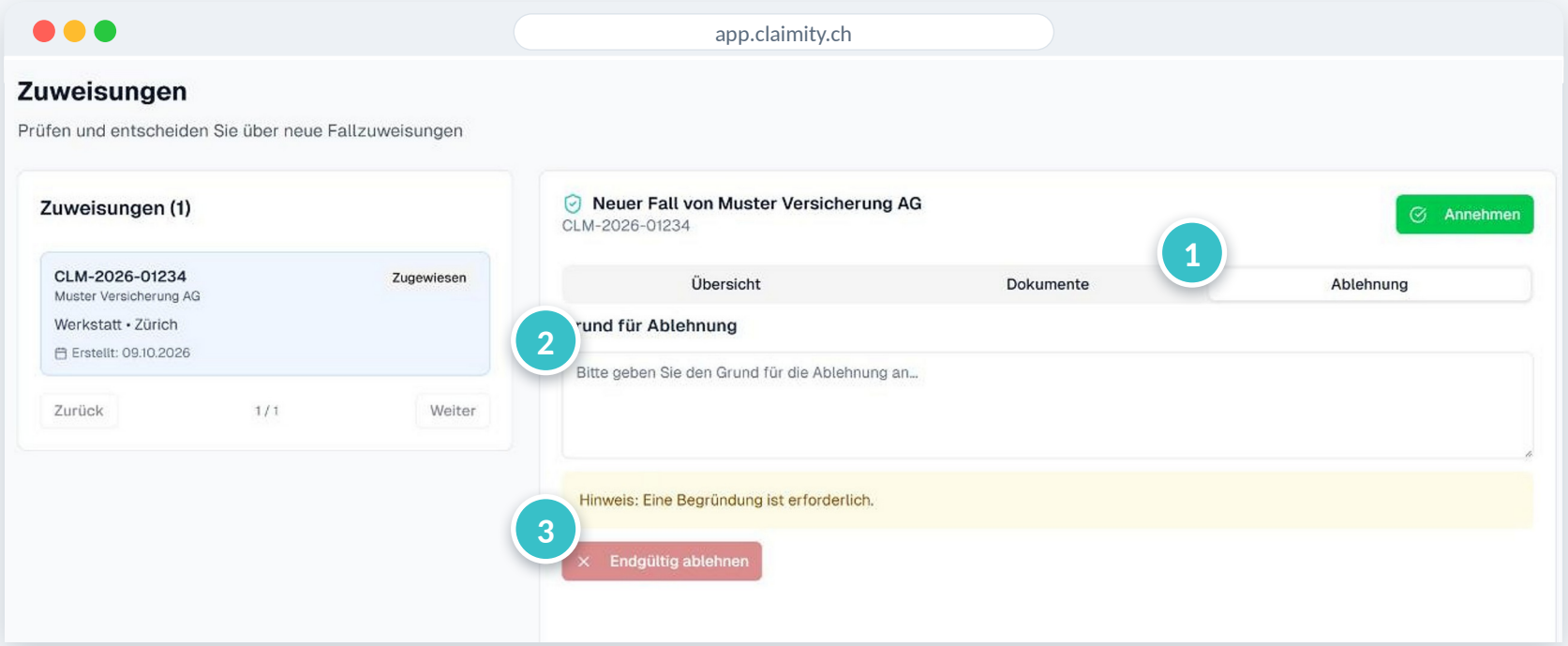
Open at the top right of the selected case.

2 State the reason

A reason is mandatory, for example capacity or region.

3 «Decline permanently»

Claimity then reassigns the case immediately.



Please respond promptly to every assignment, including a decline.

STEP 2

Find your cases

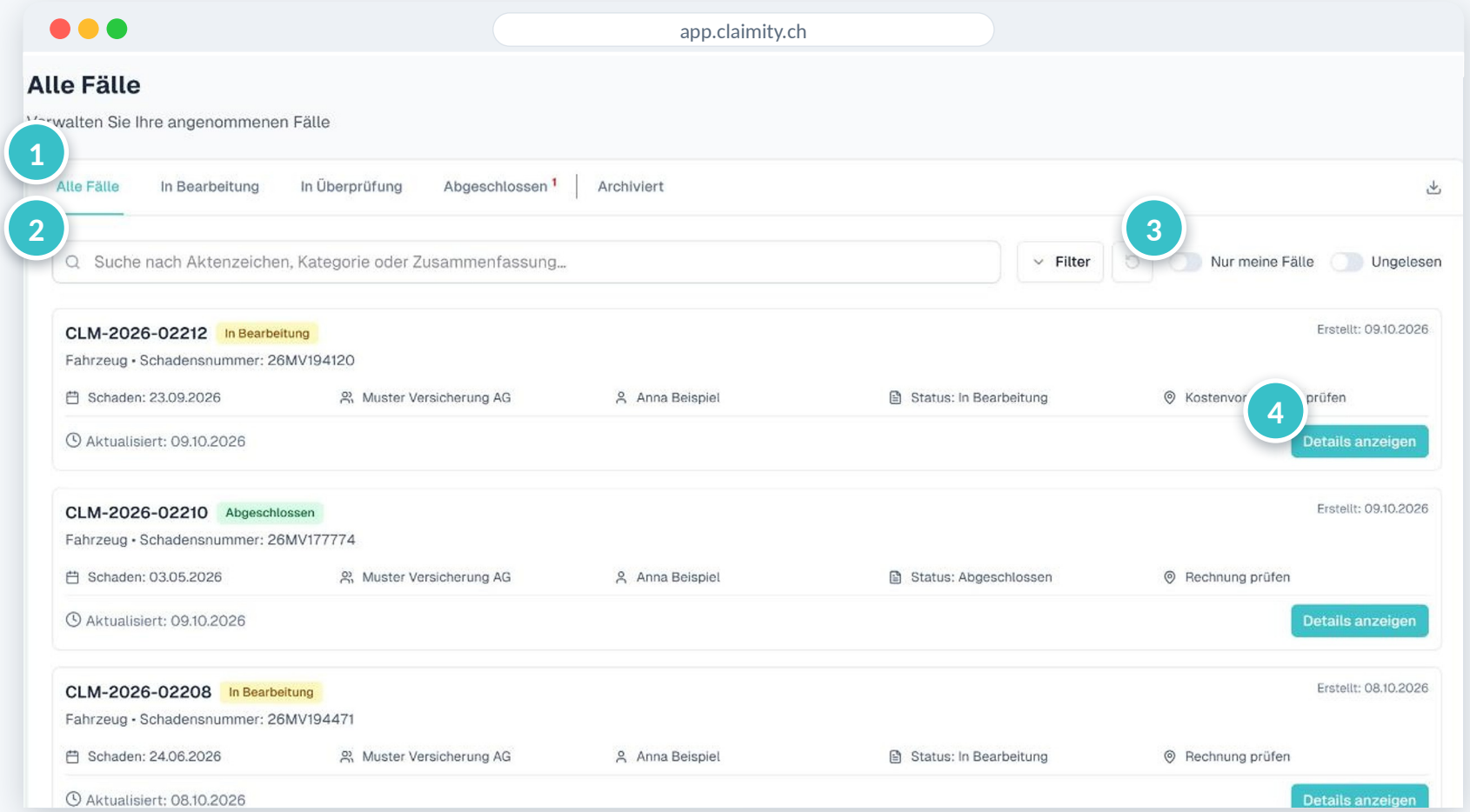
«All cases» contains all cases accepted by your organisation.

1 **Status tabs**
All cases, In progress, In review, Completed and Archived.

2 **Search**
By file number, category or summary.

3 **«Only my cases» and «Unread»**
Focus on your own cases or new messages.

4 **«Show details»**
Opens the case with all tabs.



STEP 2

The case in detail

The header and the «Overview» tab contain all details from the insurer.

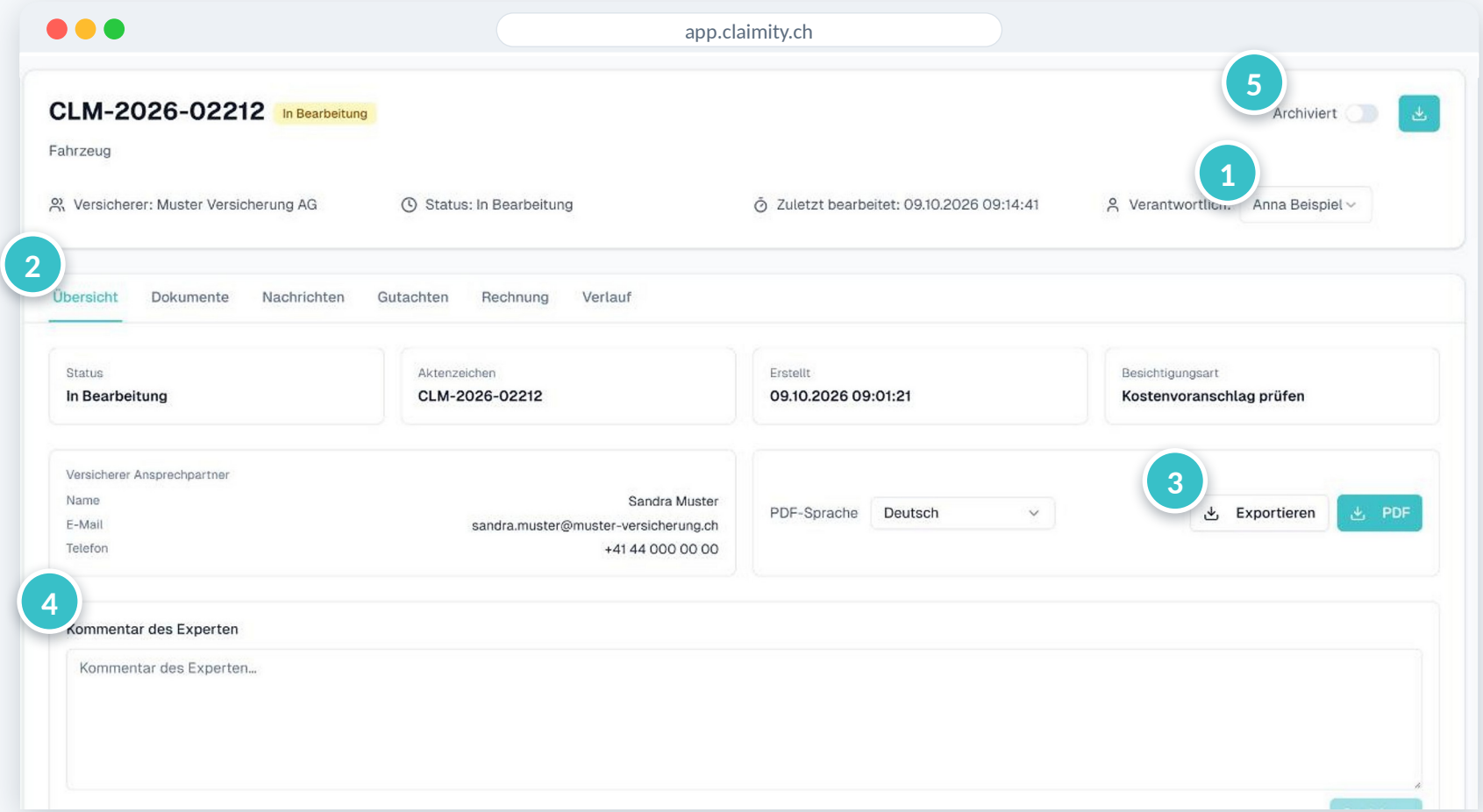
1 **«Responsible»**
Set the responsible person in your organisation.

2 **Tabs**
Overview, Documents, Messages, Reports, Invoice, History.

3 **Export**
Case data as PDF in the selected language.

4 **Expert comment**
Internal note for your organisation, for example a hint for a colleague.

5 **«Archived»**
Hide completed cases, the data is kept.



STEP 2

Documents and history

All documents from the insurer are kept centrally in the case.

1 **Tab «Documents»**

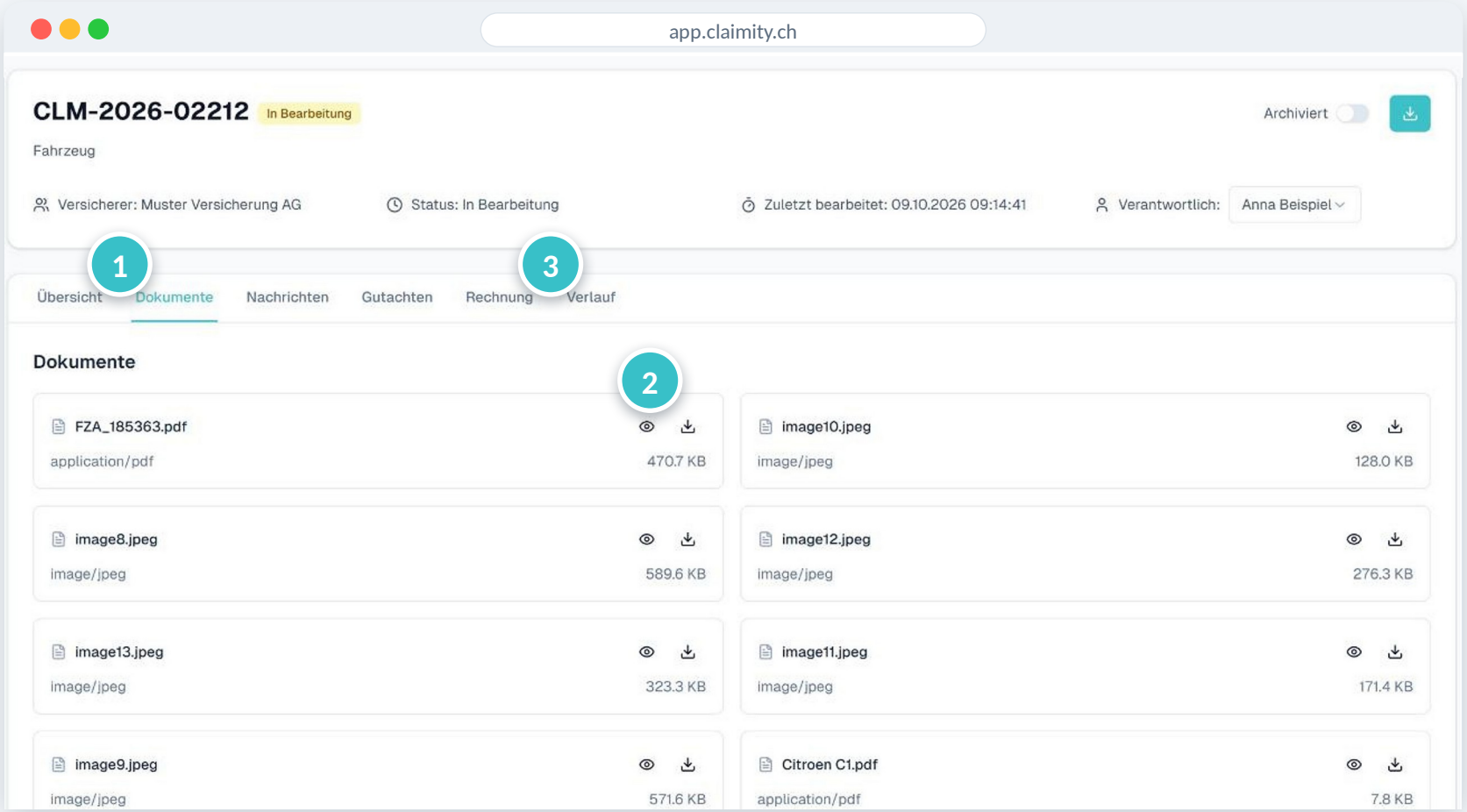
Claim notification, photos and cost estimates.

2 **View and download**

Via the eye and download icon for each file.

3 **Tab «History»**

Every step in the case with date and time.



Questions in the case chat

All communication stays documented in the case. Replies are highlighted.

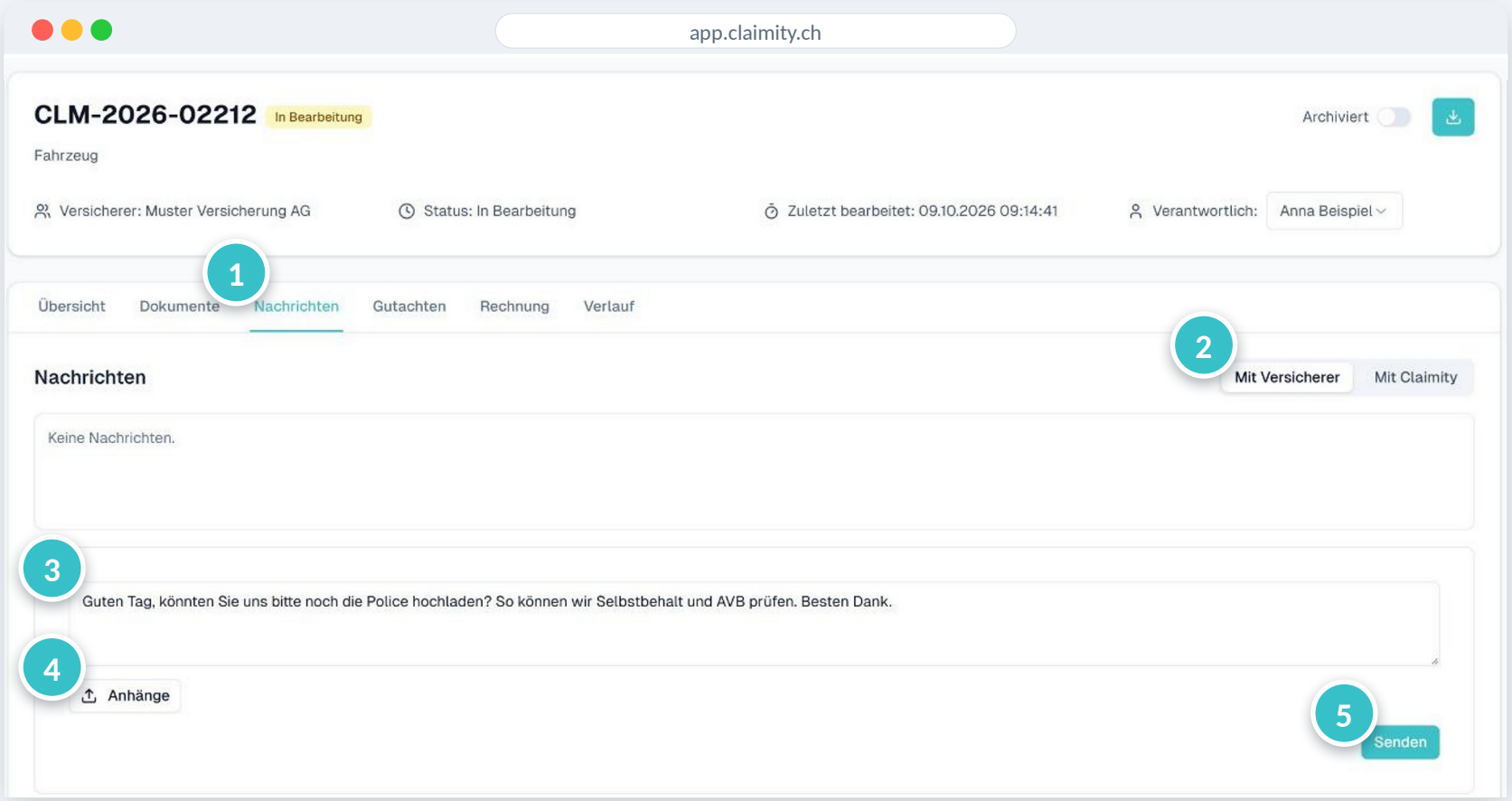
1 Tab «Messages»
Open in the respective case.

2 Choose the recipient
«With insurer» for content, «With Claimity» for platform and invoicing.

3 Write a message
Short and specific, for example missing policy or photos.

4 «Attachments»
Attach images or documents directly.

5 «Send»
The other party is notified by email.



STEP 3

Submit report

In the «Reports» tab, upload everything the insurer needs to close the case.

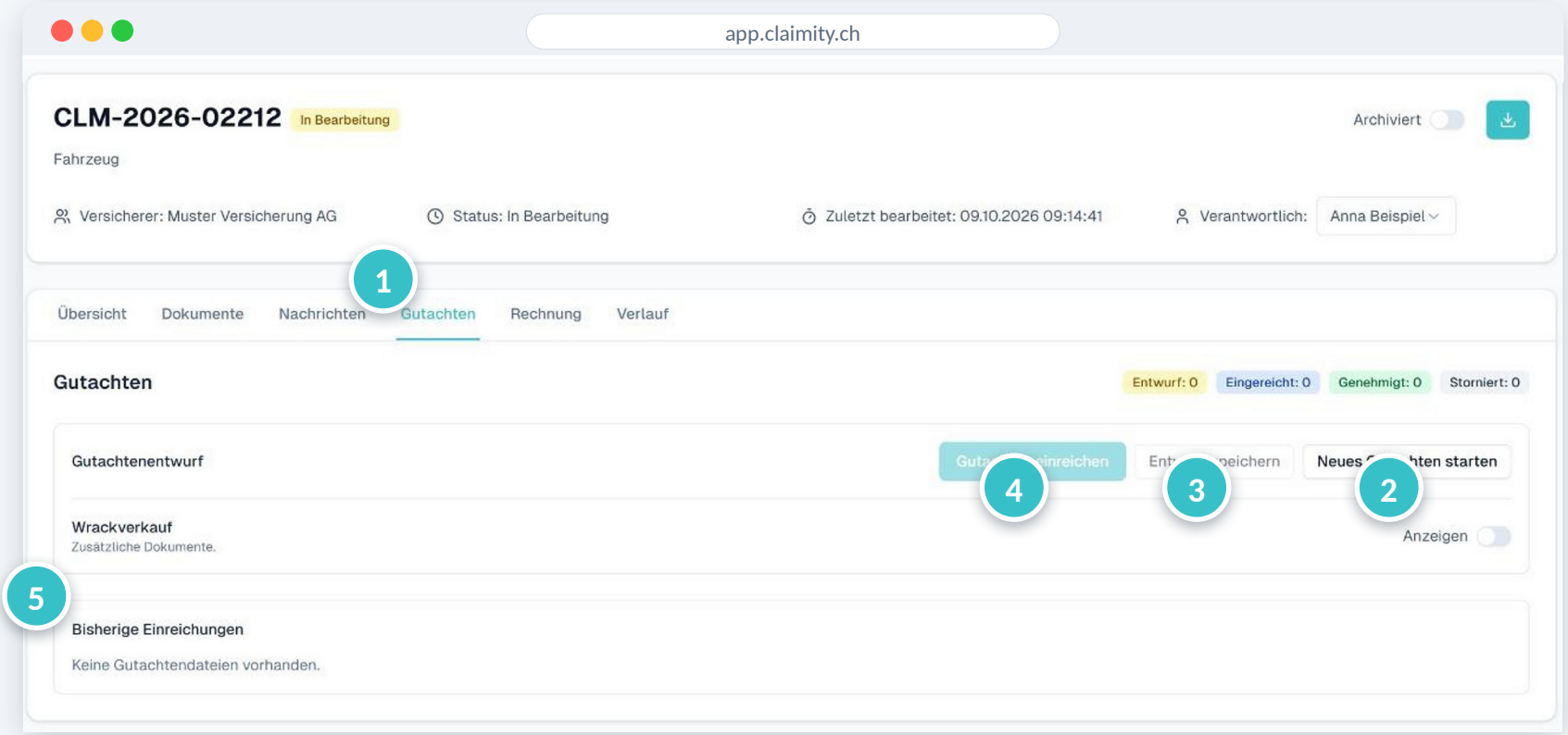
1 Tab «Reports»
Top right: the status of all submissions.

2 «Start new report»
Upload report and files, maximum 50 MB per file.

3 «Save draft»
Save progress and continue later.

4 «Submit report»
Goes to Claimity and the insurer for review.

5 Previous submissions
All submitted versions with date.



STEP 3

Total loss with salvage sale

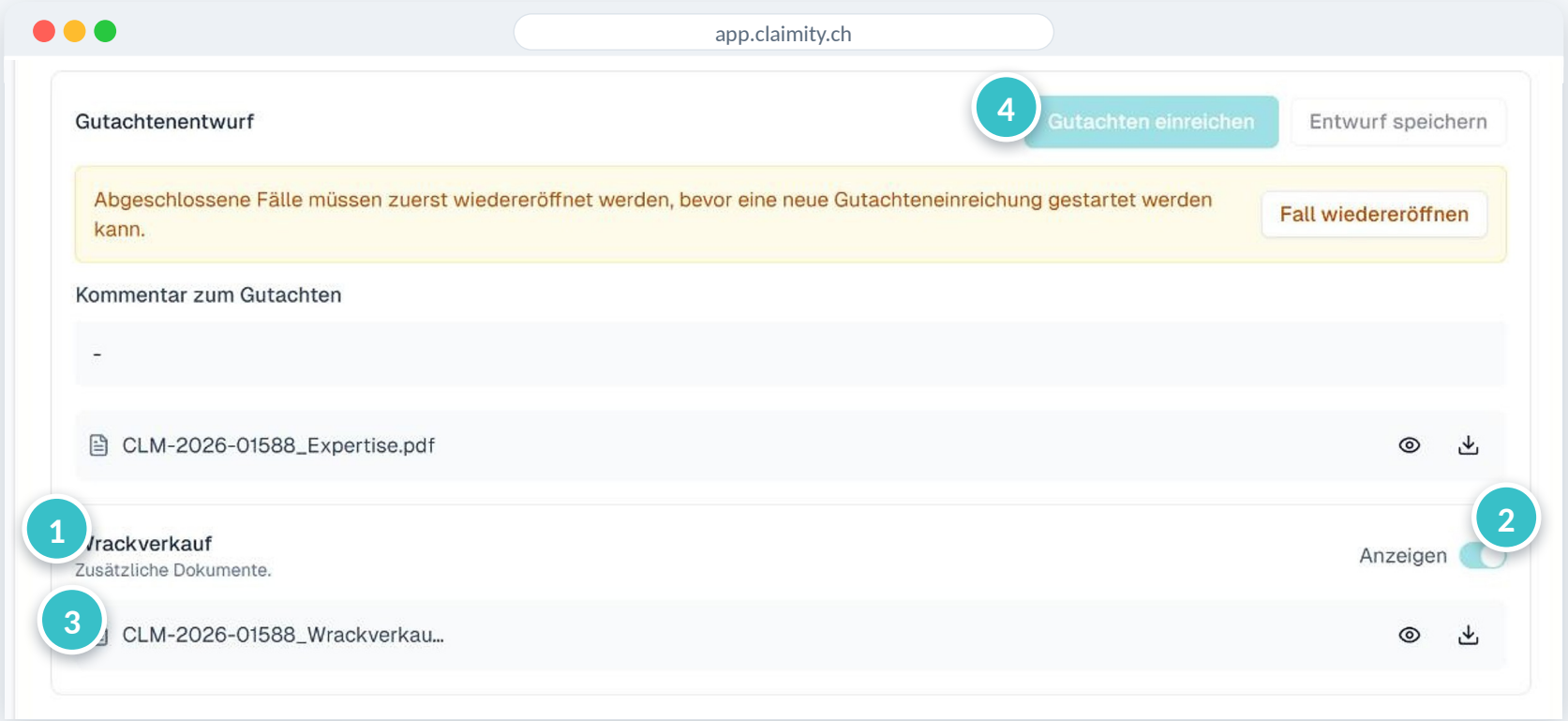
If the vehicle is sold via the salvage exchange, the sales receipt belongs to the report.

1 **Section «Salvage sale»**
In the «Reports» tab below the report draft.

2 **Activate «Show»**
Opens the field for additional documents.

3 **Upload the receipt**
Invoice from the salvage exchange or proof of the amount paid.

4 **Submit with the report**
This way the insurer sees the proceeds directly in the case.



Applies to total losses sold via the salvage exchange.

STEP 3

Correcting an expert report

If a submitted report needs to be changed, the case is reopened and a second report is uploaded.

1 **«Reopen case»**

Reopen closed cases first, then a new submission is possible.

2 **Report comment**

Record exactly what was changed compared with the first version.

3 **Upload the corrected report**

Add the new version as a file.

4 **«Submit report»**

The insurer sees the change immediately without comparing both versions.



STEP 4

Enter the invoice

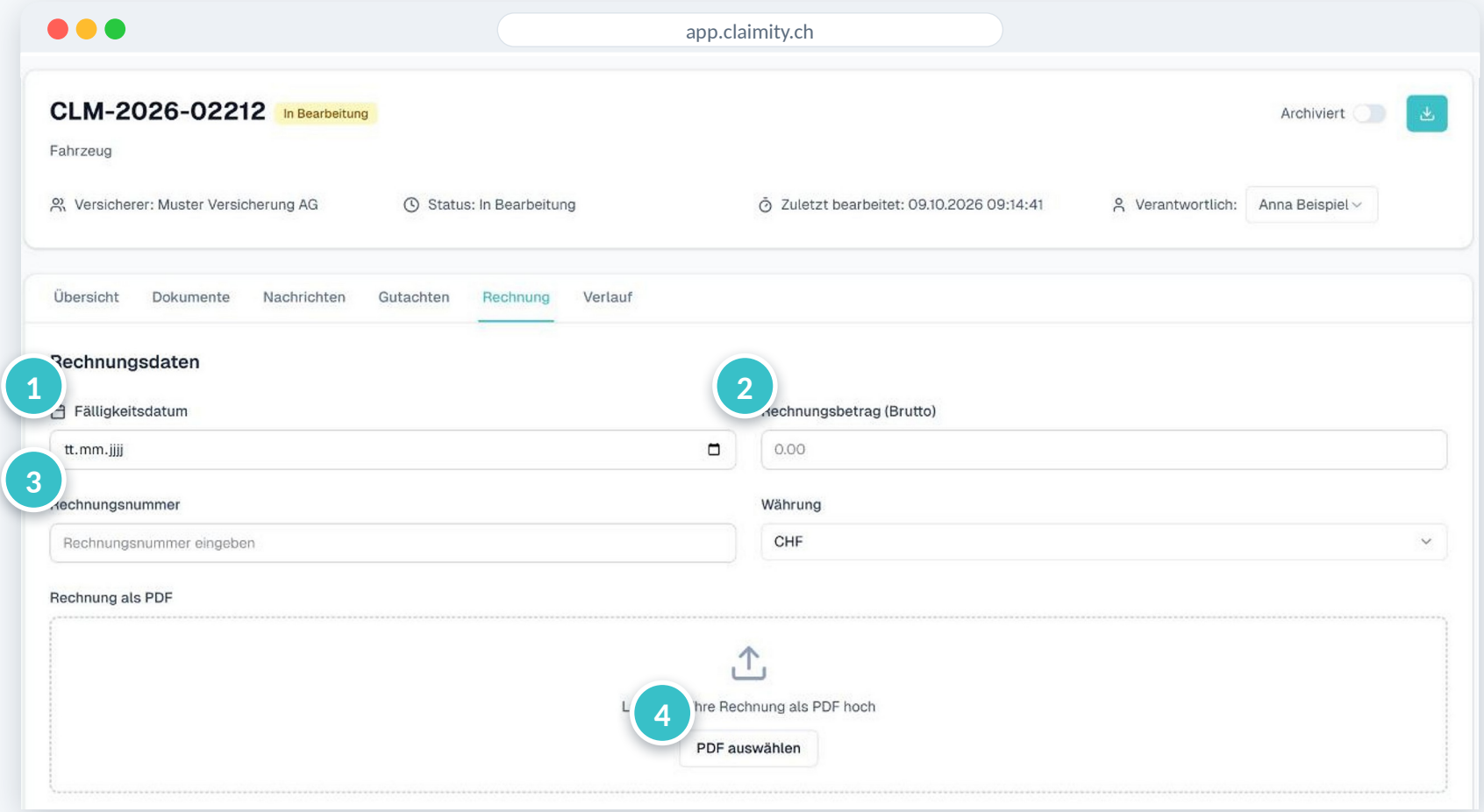
Always a separate invoice per case, addressed to Claimity AG and entered directly in the case.

1 **Due date**
According to your payment terms.

2 **Invoice amount (gross)**
Amount including VAT.

3 **Invoice number**
Your own invoice number.

4 **Invoice as PDF**
Upload with «Select PDF» and then «Save».



No collective invoices: every case gets exactly one invoice.

02

Overview and administration

Reports, team and notifications

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All reports at a glance

The «Reports» menu shows all submissions of your organisation.

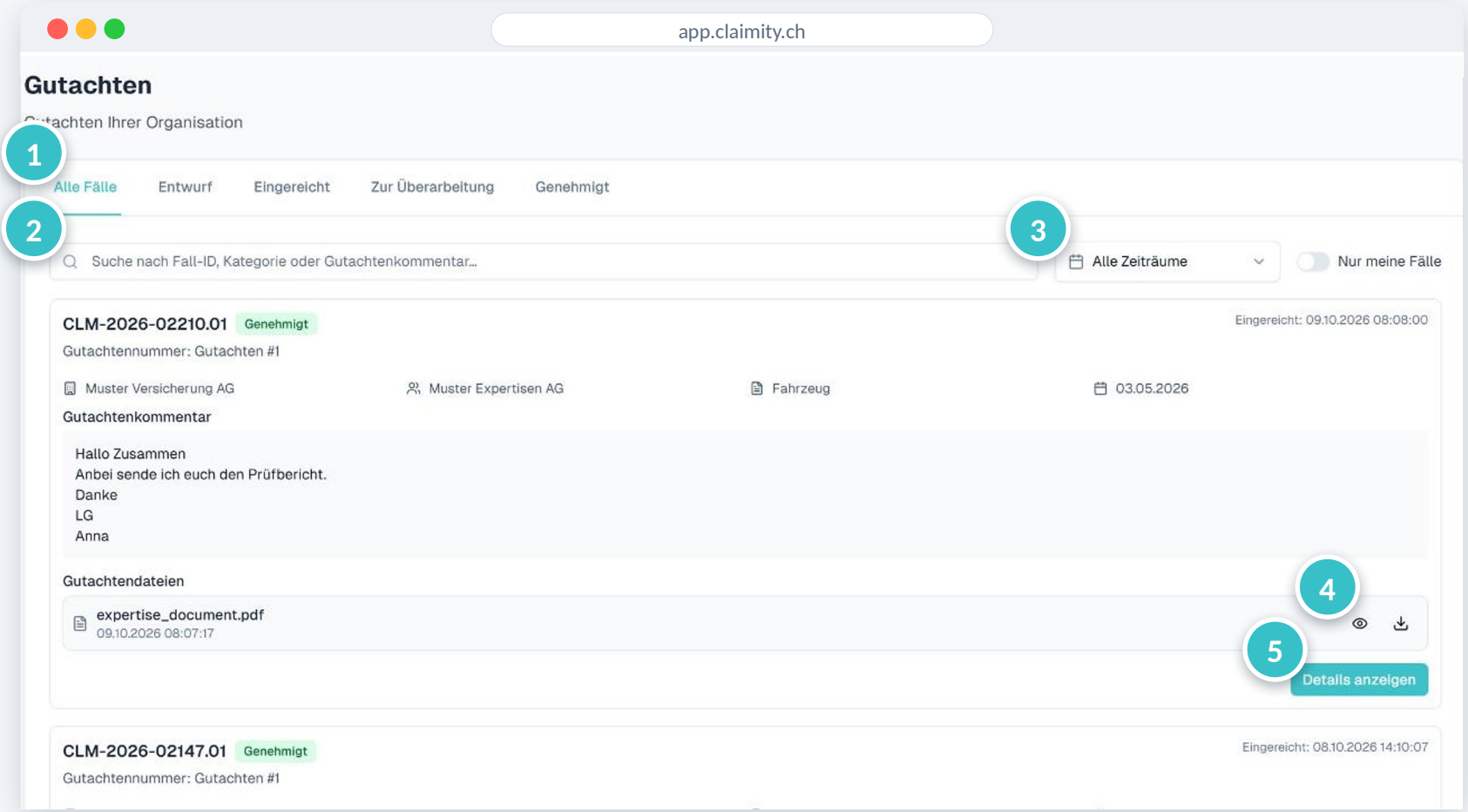
1 Status tabs
Draft, Submitted, For revision, Approved.

2 Search
By case ID, category or report comment.

3 Period and «Only my cases»
Narrow down the list.

4 View and download
Open each report file directly.

5 «Show details»
Jumps to the related case.



Manage team and roles

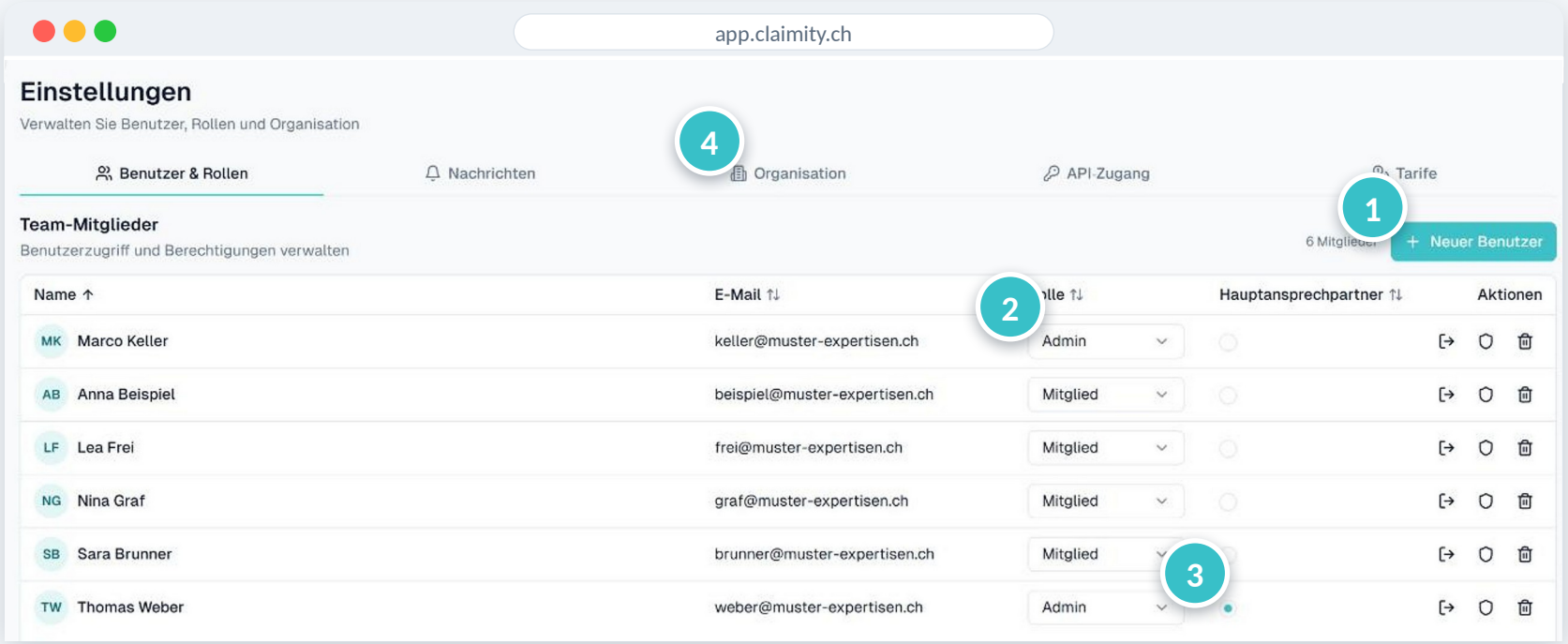
Menu «Settings», tab «Users & roles».

1 «New user»
Invite staff, they receive an email to register.

2 Role
Member or admin. Only admins can change settings.

3 Main contact
First point of contact of your organisation for Claimity.

4 Further tabs
Organisation, API access and tariffs.



Manage notifications

Tab «Messages» in the settings.

1 Activate the event

Assignment, report approved or returned, chat message.

2 Email language

Applies to emails sent to the organisation address.

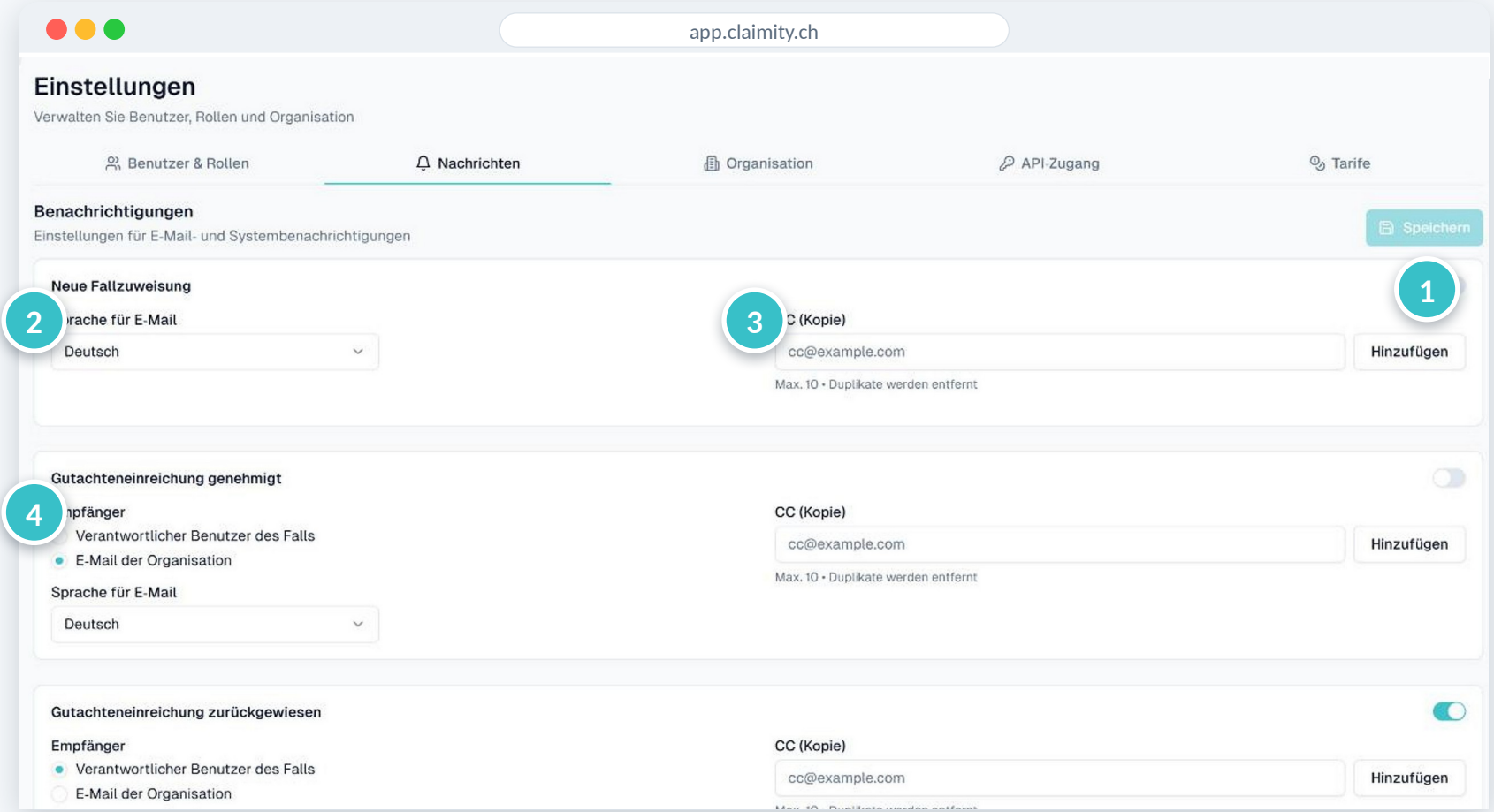
3 CC

Up to ten additional recipients.

4 Recipient

Responsible person of the case or the organisation's email.

New assignments always go to the organisation, as nobody is responsible yet.



COLLABORATION

Working well together

Six rules to close your cases quickly and cleanly.

01

Respond promptly

Accept every assignment or decline it with a reason.

02

One responsible person

Set for each case in the «Responsible» field.

03

Communication in chat

Instead of email or phone, so that everything is documented.

04

Report delays immediately

For example missing documents from the garage or an unreachable vehicle keeper.

05

Explain corrections

Record in the report comment exactly what was changed.

06

Close promptly

Submit as soon as possible, enter one invoice per case.

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Questions? We are happy to help.

Write to us directly in the case via «With Claimity» or use the contacts on the right.

Guides and frequently asked questions
docs.claimity.ch

Email
info@claimity.ch

Phone
+41 78 344 77 36

Platform
app.claimity.ch