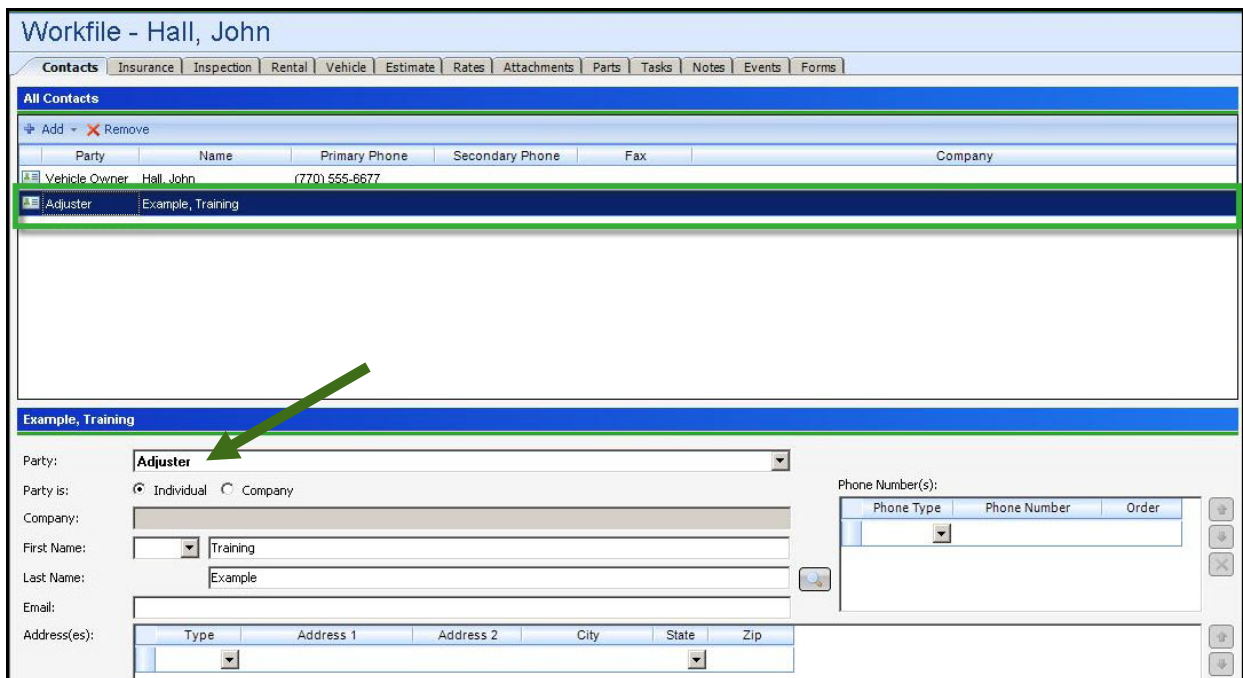


Job Aid: Request Valuation

Purpose This job aid demonstrates how to submit a Valuation Request from a workfile within CCC ONE® Estimating.

Before You Begin Complete the required information on any or all of the workfile tabs, including (but not limited to):

- On the **Contacts Tab**, add an Adjuster name and all of the Adjuster's pertinent information.



The screenshot shows the 'Workfile - Hall, John' interface. At the top, there are tabs for 'Contacts', 'Insurance', 'Inspection', 'Rental', 'Vehicle', 'Estimate', 'Rates', 'Attachments', 'Parts', 'Tasks', 'Notes', 'Events', and 'Forms'. The 'Contacts' tab is selected, showing a table with columns: Party, Name, Primary Phone, Secondary Phone, Fax, and Company. The table contains two entries: 'Vehicle Owner' (Hall, John) with phone number (770) 555-8677, and 'Adjuster' (Example, Training). Below the table, the 'Example, Training' form is visible. The 'Party:' dropdown menu is set to 'Adjuster', which is highlighted by a green arrow. Other fields include 'Party is:' (Individual selected), 'Company:', 'First Name:' (Training), 'Last Name:' (Example), 'Email:', and 'Address(es):' with columns for Type, Address 1, Address 2, City, State, and Zip. To the right, there is a 'Phone Number(s):' section with a table for Phone Type, Phone Number, and Order.

- On the **Vehicle Tab**, enter the **VIN** and decode it. If it decodes correctly, a Good VIN message displays.
- If the VIN is Unknown, enter **UNK** and click **Select Standard Vehicle**. Select a vehicle from the list.

Important! These fields are required to submit a Valuation Request. Once entered, you can write an estimate or submit a total loss request. If no estimate is required, you can go directly to the Total Loss tab.

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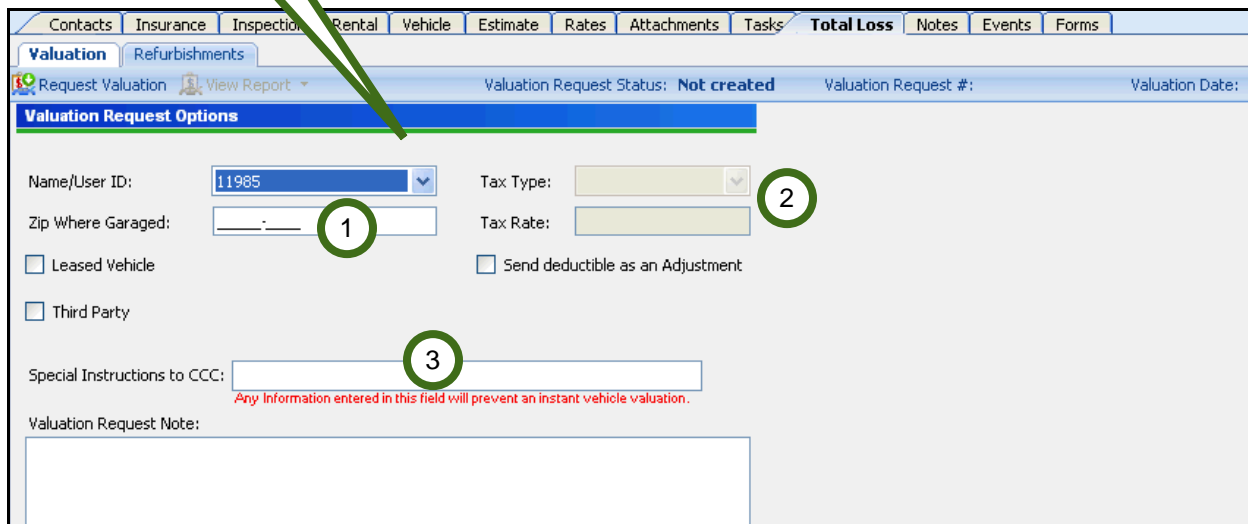
Job Aid: Request Valuation, Continued

Request Procedure

Use the following steps to Submit a **Valuation Request** on the Total Loss Tab of the workfile. **Important!** Make sure you entered the Adjuster's name on the Contacts Tab first! *If you forget, you will receive an error message that takes you back to the Contacts Tab.*

Step	Action
1	The ZIP code where the loss vehicle is garaged is entered also. The ZIP code was entered on the Contacts tab within the workfile.
2	For Tax Type , the default is Auto Tax, which allows CCC to calculate the sales tax based on the loss ZIP code. <div style="display: flex; align-items: center;"> <div style="border: 1px solid gray; padding: 5px; margin-right: 20px;"> <p>Tax Type: Auto Tax ▼</p> <p>Tax Rate: Auto Tax</p> <p style="background-color: #e0e0e0; padding: 2px;">User Tax Rate</p> </div> <div> <p>You can manually override this by selecting User Tax Rate from the drop list and entering a Tax Rate in the text box.</p> </div> </div>
3	You can enter information into the Special Instructions to CCC field. Note: This will result in the valuation not being completed instantly. A manual valuator will need to review the special instructions. <div style="border: 1px solid gray; padding: 5px; display: inline-block;"> Special Instructions to CCC: <input style="width: 150px;" type="text"/> </div>

Note: Name / User ID should automatically display your default CCC ONE® Valuation ID. To select another ID from the list, click the drop arrow and select it.



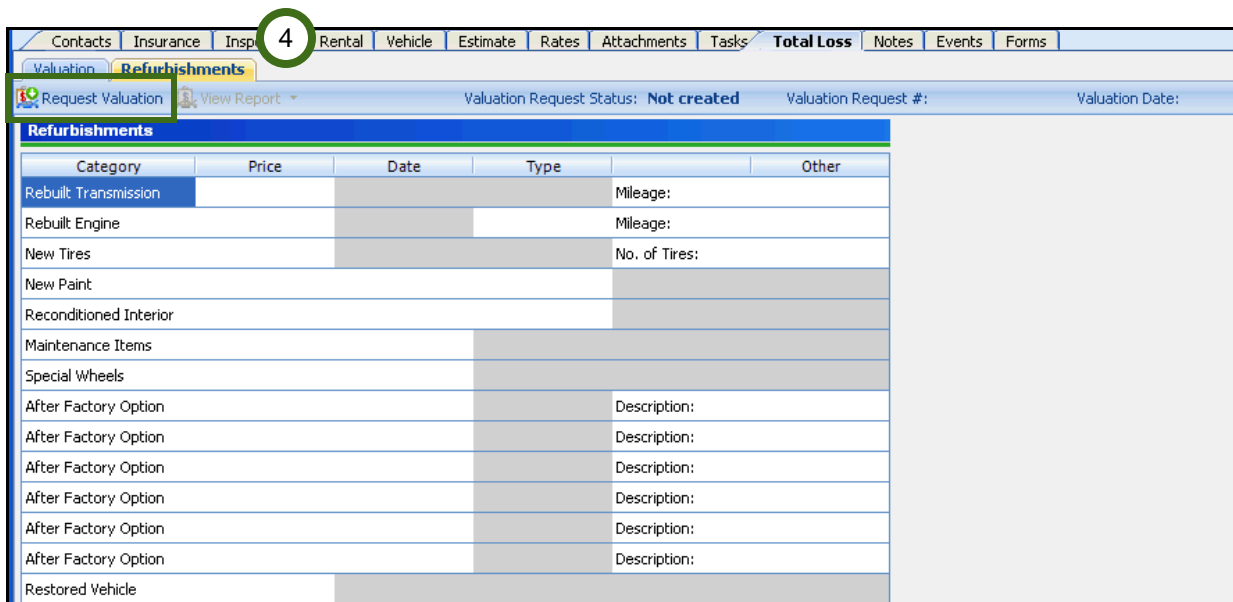
The screenshot shows the 'Valuation Request Options' form in the software. The 'Name/User ID' dropdown is set to '11985'. The 'Zip Where Garaged' field is empty and circled with a '1'. The 'Tax Type' dropdown is set to 'Auto Tax' and circled with a '2'. The 'Tax Rate' field is empty. The 'Special Instructions to CCC' text area is empty and circled with a '3'. Below this field, a red note reads: 'Any Information entered in this field will prevent an instant vehicle valuation.' There are also checkboxes for 'Leased Vehicle', 'Third Party', and 'Send deductible as an Adjustment'.

Continued on next page

Job Aid: Request Valuation, Continued

Request Procedure
(continued)

Step	Action
4	Enter refurbishments if needed on the Refurbishments tab . Return to Valuation tab.



The screenshot shows the software interface with the 'Refurbishments' tab selected. The 'Request Valuation' button is highlighted with a green box. The table below lists various refurbishment categories and their associated fields.

Category	Price	Date	Type	Other
Rebuilt Transmission				Mileage:
Rebuilt Engine				Mileage:
New Tires				No. of Tires:
New Paint				
Reconditioned Interior				
Maintenance Items				
Special Wheels				
After Factory Option				Description:
After Factory Option				Description:
After Factory Option				Description:
After Factory Option				Description:
After Factory Option				Description:
After Factory Option				Description:
Restored Vehicle				

5	Once you have completed all required information, click the Request Valuation link. 
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You will receive notification that the request was submitted. The status on the workfile will change:

Valuation Request Status: **Submitted** Valuation Request #: **42846747**

When the report is returned, you will find the .pdf copy on the Attachments tab and on the Workfiles View Preview.