

# CCC<sup>®</sup> Contact Center – Configuration

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**Introduction** This document details the setup and configuration of a Repair Facility's Contact Center in CCC ONE<sup>®</sup>.

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# CCC® Contact Center - Configuration

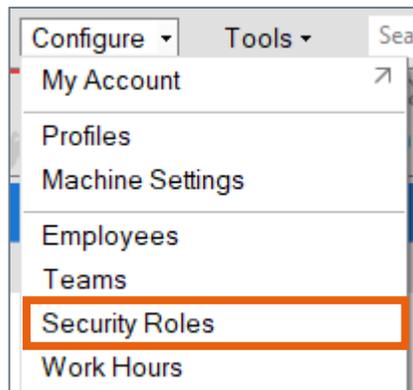
## Target Audience

Call Center Representative/User with Administrative roles.

## Setting Work Hours and Security Roles

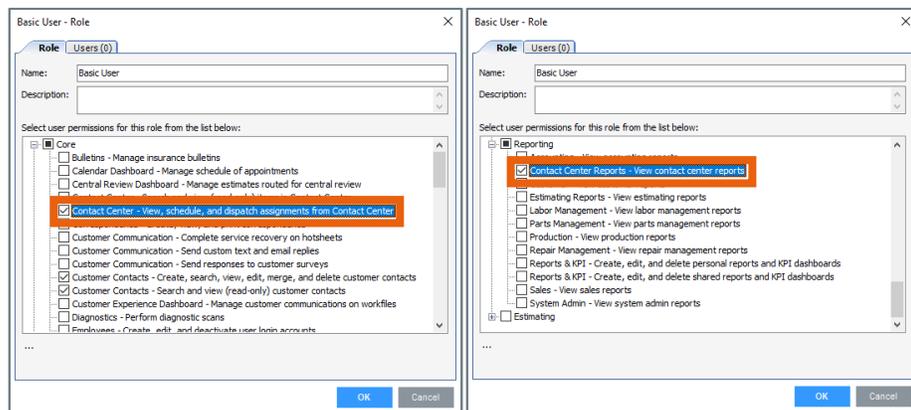
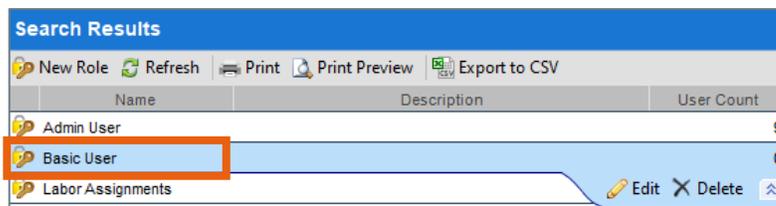
RF with Call Center needs to be set up with work hours and security roles.

1. Log in to **CCC ONE**.
2. Select **Configure** on top right and then select **Security Roles** from the list.



3. Double-click the **role** as needed from the list.  
In the window that displays select the following two roles for this user and click **OK**.

- View, schedule, and dispatch assignments from Contact Center
- Contact Center Reports – to view contact center reports.



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# CCC® Contact Center - Configuration, Continued

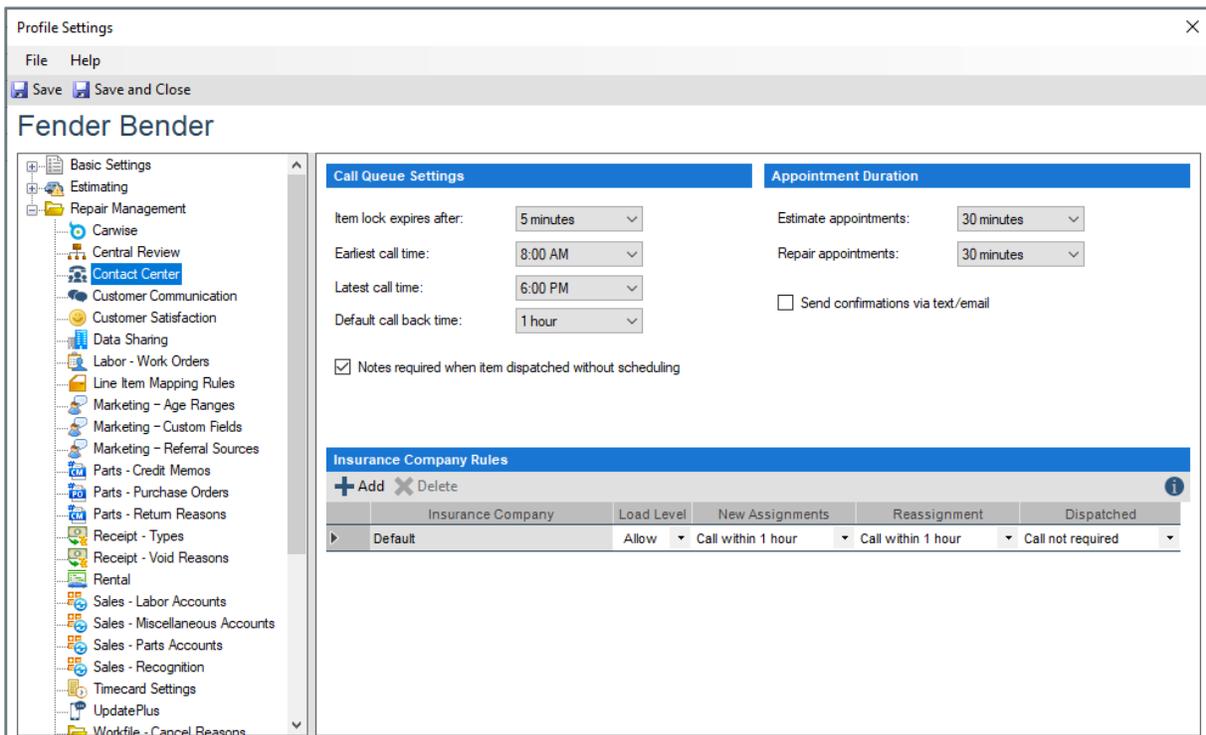
## Setting Profiles

You need to set up a profile:

- at the MSO level for MSOs or
- for a single store with contact center

Follow the steps below to set up this profile:

1. Select **Configure > Profiles** from the list.
2. On the **Profiles Settings** window, expand **Repair Management** and select **Contact Center**.



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## CCC® Contact Center - Configuration, Continued

**Setting Profiles,**  
continued

The **Call Queue settings** window displays basic settings that you need to set up.

<b>Item lock expires after</b>	To set up when an item lock will expire. For example, a Call Center representative working on an assignment has forgotten to complete the schedule and left for lunch. It will unlock after the specified time for another user/representative to manage. The Call Center user can override the current user but does not have viewing capabilities.
<b>Earliest and Latest Call Time</b>	Allows you to specify the time frame you will make calls to your customers. For example, you do not want to call customers: Prior to 9 am, set the Earliest Call time to 9 am. After 6 pm, set the Latest Call time to 6 pm.  This will warn the Call Center representatives if they try to make calls outside this time frame. This also takes into consideration the time zone for the Call Center and the RF. For example, calling a customer in a Central time zone location at 9 am from an Eastern time zone will give a warning since it is only 8 am in the Central time zone.
<b>Default Call Back Time</b>	Automatically shows the call back time when you go ahead and schedule an appointment. You can always change the call time manually.
<b>Notes required when items dispatched without scheduling</b>	Select if you want the note to be entered prior to dispatching those assignments that have not been scheduled.
<b>Estimate Appointments and Repair Appointments</b>	Time needed for estimate and repair appointments as indicated by the RF. Typically, time required for an estimate schedule is less than a repair schedule as per RF requests (30/60 minutes).
<b>Send Confirmation via text/email</b>	Select to send appointment confirmation and reminders using text or email.

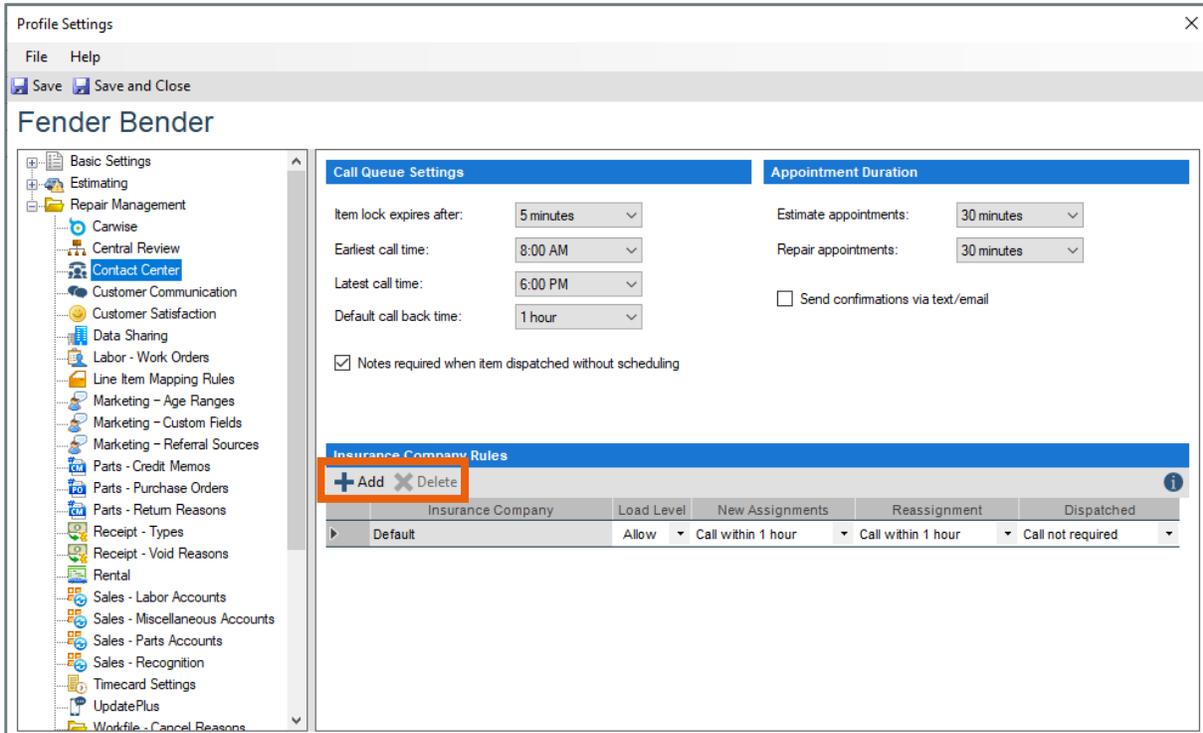
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# CCC® Contact Center - Configuration, Continued

## Insurance Company Specific Rules and Guidelines

To set up rules dictated by insurance companies, you must add those insurance companies and specify rules according to their guidelines.

To add an insurance company, click **Add**. Similarly click **Delete** if you no longer need to specify rules for the Insurance Company. Insurance companies not in the list will assume default settings.



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## CCC® Contact Center - Configuration, Continued

### Insurance Company Specific Rules and Guidelines, continued

<b>Load Level</b>	Allows Contact Center representatives to change the location of RF that assignments can go to, irrespective of the originally assigned RF. (Controls volume that goes to the shop). You can select <b>Allow or Do Not Allow</b> as per the Insurance Company's guideline.
<b>New Assignments</b>	This is to indicate a call time when the Call Center representative needs to call the customer. If not satisfied, this assignment will display in red in the Call Queue indicating it's past due.  <b>Note:</b> It is a good idea to set this time lower than the specified guideline to provide enough time for the Contact Center representative to satisfy the target deadline.  <b>Note:</b> If the Insurance Company does not want the Contact Center to manage assignments and wants them to go directly to the assigned RF, select the <b>Automatically Dispatch</b> option here. In this case, Contact Center will not need to manage this assignment and it will flow directly to the assigned RF.
<b>Reassignment</b>	You can set the time when a Call Center representative needs to contact a customer for reassignments. If not satisfied, this assignment will display in red in the Call Queue indicating it's past due.
<b>Dispatched</b>	Set up a time period for when the Call Center representative needs to call customers after they dispatch. This depends on workflow of Repair shops. You can also select call not required here.
<b>i icon</b>	Hover over the i icon with your mouse to view descriptions for setting options.

The screenshot displays the 'Insurance Company Rules' configuration window. At the top, there are '+ Add' and 'X Delete' buttons. Below is a table with the following columns: Insurance Company, Load Level, New Assignments, Reassignment, and Dispatched. The first row is 'Default' with values: Allow, Call within 1 h..., Automatically ..., Call within 2 h... The second row is 'CCC INSURANCE COMPAN' with values: Allow, Call within 1 h..., Call within 1 h..., Call not requir... An information icon (i) is highlighted in a red box in the top right of the table, with an orange arrow pointing to a detailed description panel on the right. The description panel is titled 'Insurance Company Rules' and contains the following text:

- Load Level**  
Allows an assignment to be dispatched to any shop location within the or
- New Assignments**  
Sets the initial "Call By" time when a new assignment is received. If set to then all assignments for the specified insurance company will be sent dir selected by the insurance company.
- Reassignments**  
Sets the initial "Call By" time when a reassignment is received from the in to "Automatically dispatch", then the assignment will be sent directly to th by the insurance company in the reassignment.

Once you are done setting up, click **Save and Close**.