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Partner.

## CCC ONE® Communications Features

### Overview

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**Introduction** CCC has made several enhancements to the communication functions within CCC ONE® to improve ease of use and cycle time. With an “always connected” platform, CCC ONE® receives and sends assignments and estimates automatically.

This job aid summarizes the new features related to communications.

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## Setup Job Aid: Add Aftermarket, Reconditioned and Optional OEM (ARO) Vendors to CCC ONE®

**Purpose** Aftermarket, Reconditioned and Optional OEM parts suppliers are not converted from CCC Pathways® to CCC ONE®. This Job Aid demonstrates how to add ARO Vendors.

**Procedure** Use the following steps to add Aftermarket Vendors.

Step	Action
1	Go to the <b>View Menu</b> and select <b>Vendor</b> . The Vendor screen displays.



The screenshot shows the 'Vendors' search results page. On the left, there are search filters for 'Vendor Name', 'Status' (set to 'Active'), and 'Show alternate parts vendors with' (checkboxes for Aftermarket, Optional OEM, Reconditioned). The main area displays a table of search results with columns for 'Active', 'Vendor Name', 'A/M', 'Opt OEM', 'Recond', and 'Primary Phone'. The 'New Vendor' link at the top of the results is highlighted with a green box.

Active	Vendor Name	A/M	Opt OEM	Recond	Primary Phone
✓	1-800 Radiator (National)	✓			(800) 723-4286 Business
✓	1-800-Radiator Cal South FPPP	✓			(800) 723-4286 Business
✓	1001 Best Autolite Dist.				(866) 567-3500 Business
✓	1001 Best Autolite Dist. 1	✓			(866) 567-3500 Business
✓	Aftermarket Radiator Exchange	✓			(800) 229-0800 Business

2 Click on the **New Vendor** link. The New Vendor wizard displays. You must select the Vendor Source to begin.



The screenshot shows the 'New Vendor' wizard's 'Vendor Source' screen. It prompts the user to 'Please select the source for adding the new vendor.' There are three radio button options: 'New Vendor', 'Vendor from Aftermarket database' (which is selected and highlighted with a green box), 'Vendor from Optional OEM database', and 'Vendor from Reconditioned database'. 'Next' and 'Cancel' buttons are at the bottom right.

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## Setup Job Aid: Add Aftermarket, Reconditioned and Optional OEM (ARO) Vendors to CCC ONE®, Continued

Procedure  
(continued)

Step	Action
3	Select <b>Vendor from Aftermarket database</b> and then click <b>Next</b> . The Select Vendors criteria display.
4	Select desired search criteria and then click the <b>Search</b> button. Vendors that meet the selected criteria display as shown above.
5	Click in checkbox of desired vendors to select them and then click <b>Next</b> . The Activate Aftermarket Vendor screen displays.
	Click <b>Finish</b> to add the selected Vendors.
	Repeat steps to add Recycled or Optional OEM vendors.

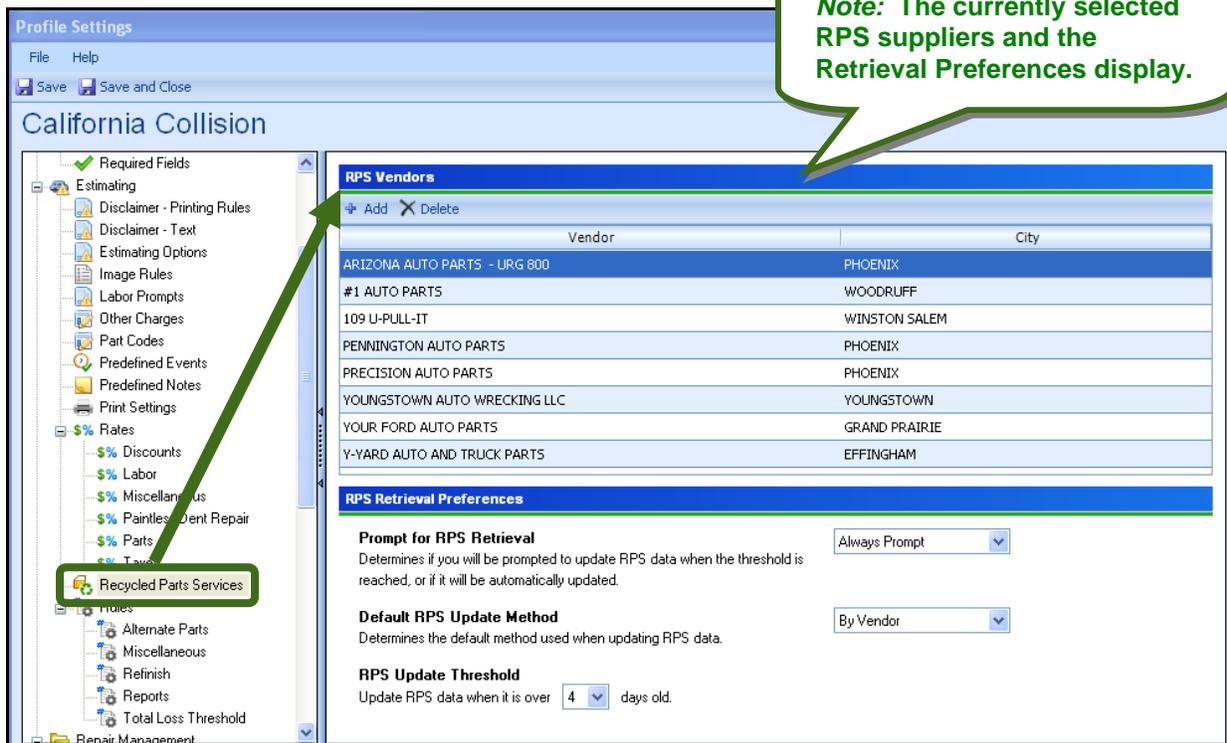
**Important!** You may get a prompt to identify the right Vendor if multiple similar vendors match the one you select. Select the correct Vendor and continue to this screen.

## Setup Job Aid: Add Recycled Parts Services (RPS) Suppliers

**Purpose** RPS suppliers are converted from CCC Pathways® to CCC ONE®. This Job Aid demonstrates how to add/update Recycled Parts Services suppliers to your Repair Facility Profile.

**Procedure** Use the following steps to add RPS suppliers to your Repair Facility profile.

Step	Action
1	Go to the <b>Configure Menu</b> and select <b>Profiles</b> .
2	Open the Repair Facility Profile (or Repair Facility Location Profile) that you want to update.



**Note:** The currently selected RPS suppliers and the Retrieval Preferences display.

RPS Vendors	
Vendor	City
ARIZONA AUTO PARTS - URG 800	PHOENIX
#1 AUTO PARTS	WOODRUFF
109 U-PULL-IT	WINSTON SALEM
PENNINGTON AUTO PARTS	PHOENIX
PRECISION AUTO PARTS	PHOENIX
YOUNGSTOWN AUTO WRECKING LLC	YOUNGSTOWN
YOUR FORD AUTO PARTS	GRAND PRAIRIE
Y-YARD AUTO AND TRUCK PARTS	EFFINGHAM

**RPS Retrieval Preferences**

**Prompt for RPS Retrieval**  
Determines if you will be prompted to update RPS data when the threshold is reached, or if it will be automatically updated. Always Prompt

**Default RPS Update Method**  
Determines the default method used when updating RPS data. By Vendor

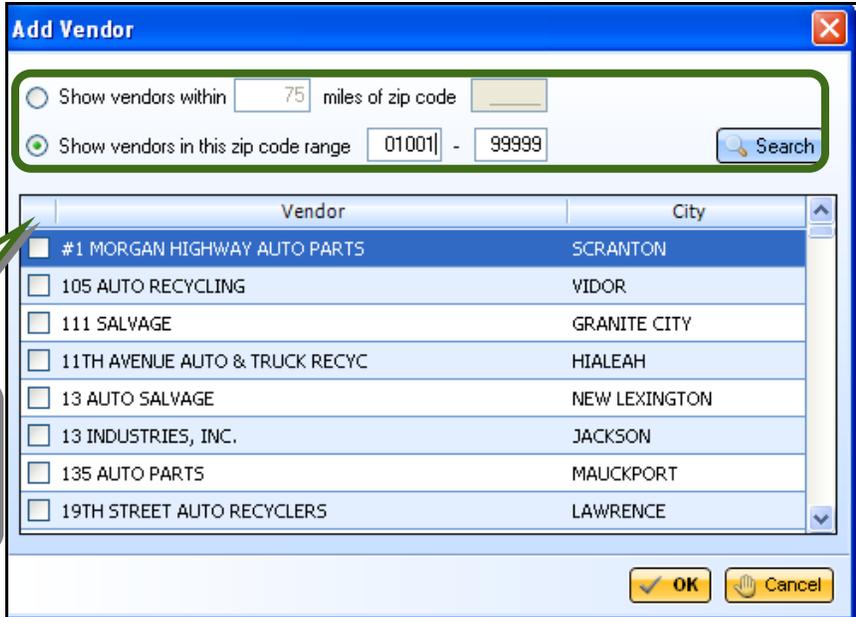
**RPS Update Threshold**  
Update RPS data when it is over 4 days old.

3	Locate the <b>Recycle Parts Services option</b> on the left pane and click to open the <b>RPS Vendors</b> portion of the Profile.
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## Setup Job Aid: Add Recycled Parts Services (RPS) Suppliers, Continued

(continued)

Step	Action
4	Click the <b>Add</b> link. The Add Vendor dialog displays.
	
5	Select desired criteria (show within X miles or zip code range) and click <b>Search</b> . Vendors that meet the selected criteria display.
6	Click in checkbox of desired vendors to select them.
7	Click <b>OK</b> to add those vendors to the RPS section of the Profile.

**Note:** Add Vendor displays with the default (or last) search options selected. The vendors that meet the criteria automatically display.

## Setup Job Aid: Configure Notifications Groups

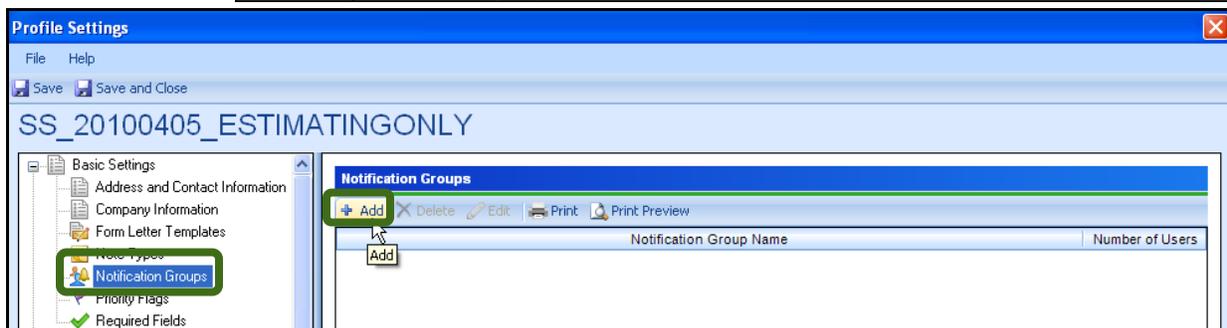
### Purpose

By default, assignment notifications and Autoverse messages will be delivered to all users. The messages can be delivered to specific users for specific insurance companies. This Job Aid demonstrates how to setup and configure notifications groups to receive these messages.

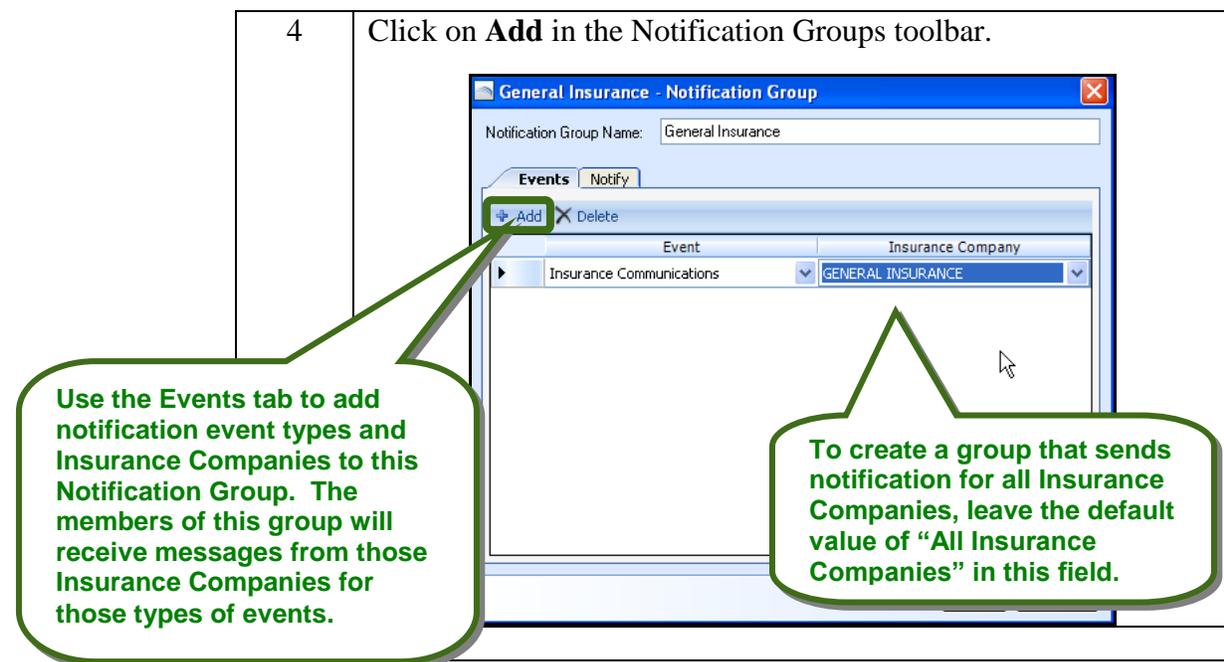
### Procedure

Use the following steps to configure Notification Groups:

Step	Action
1	Go to the Main Menu, and select <b>Configure &gt; Profiles</b> .
2	Locate and click on the <b>Repair Facility Profile</b> . The Profile will display in a new window.
3	In the left pane, <b>Notification Groups</b> . The Notification Groups screen displays.



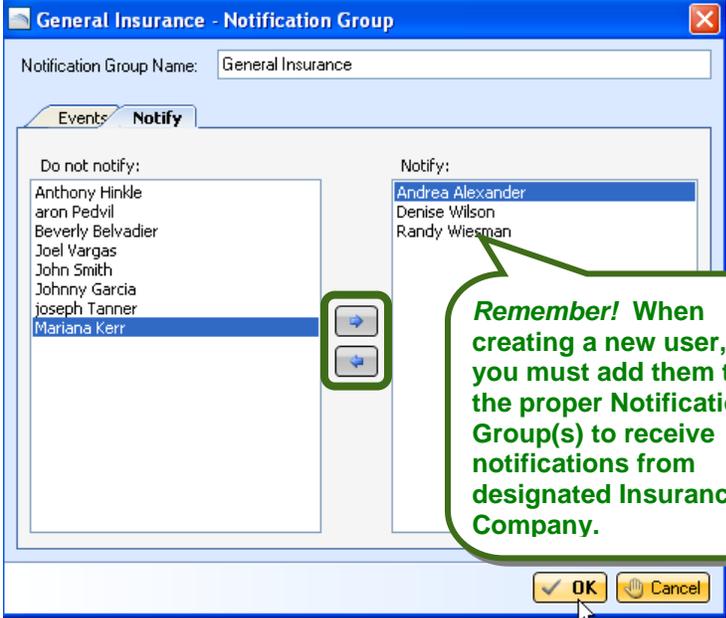
4 Click on **Add** in the Notification Groups toolbar.



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## Setup Job Aid: Configure Notifications Groups, Continued

(continued)

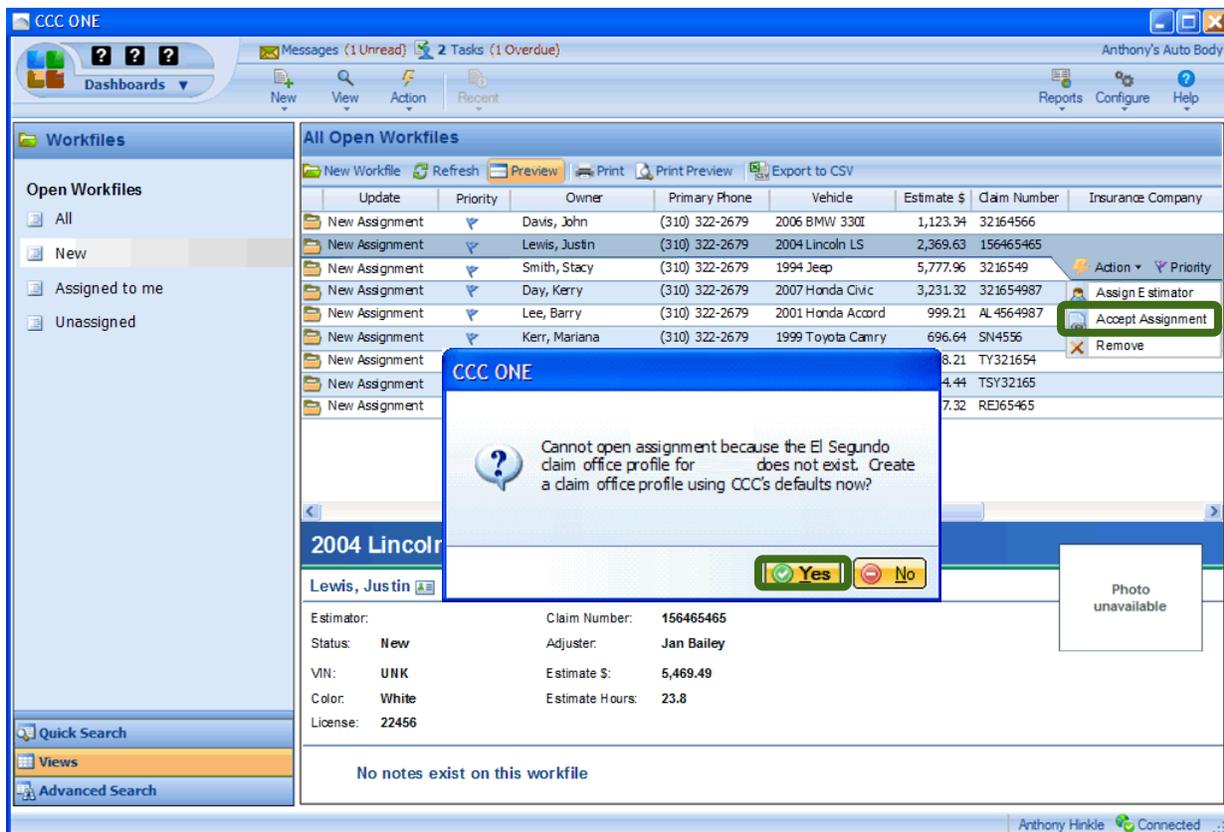
Step	Action
5	Enter a <b>Name</b> for the Notification Group (i.e. General Insurance)
6	In the events tab, click on <b>Add</b> .
7	Use the menu to select the Event type. We suggest “Insurance Communications”.
8	Select the desired <b>Insurance Company</b> whose messages this Group should receive.
9	Click on the <b>Notify</b> tab.  
10	Select the <b>Employees</b> to notify when an assignment or message is received from the selected Insurance Company.
11	Click the <b>OK</b> button. You are returned to the Profile.
12	Click <b>Save and Close</b> to save your changes to the Profile.

## Setup Job Aid: Profiles and Claim Offices

**Purpose** Profiles and Claim Offices are automatically converted from CCC Pathways® to CCC ONE®. New Insurance Company and Claim Office Profiles are now automatically created as new assignments are received. All users may remain in the system while profiles are created or modified. This Job Aid demonstrates how this works.

**New Profile Procedure** When an assignment originating from a new Insurance Company profile is received, the user will be prompted to automatically create the profile. Use the following steps to handle the new Profile.

Step	Action
1	Locate and double click on the new assignment workfile or click on the Action menu and select “Accept Assignment”.



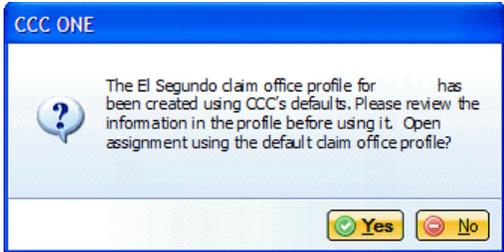
The screenshot shows the CCC ONE software interface. A dialog box is open with the following text: "Cannot open assignment because the El Segundo claim office profile for [redacted] does not exist. Create a claim office profile using CCC's defaults now?". Below the text are two buttons: "Yes" (highlighted with a green box) and "No". The background shows a table of workfiles with columns: Update, Priority, Owner, Primary Phone, Vehicle, Estimate \$, Claim Number, and Insurance Company. One row is selected, showing details for a 2004 Lincoln LS assigned to Justin Lewis.

2	The system prompts you that the Claim Office Profile does not exist. Click the <b>Yes</b> button to add the new Profile.
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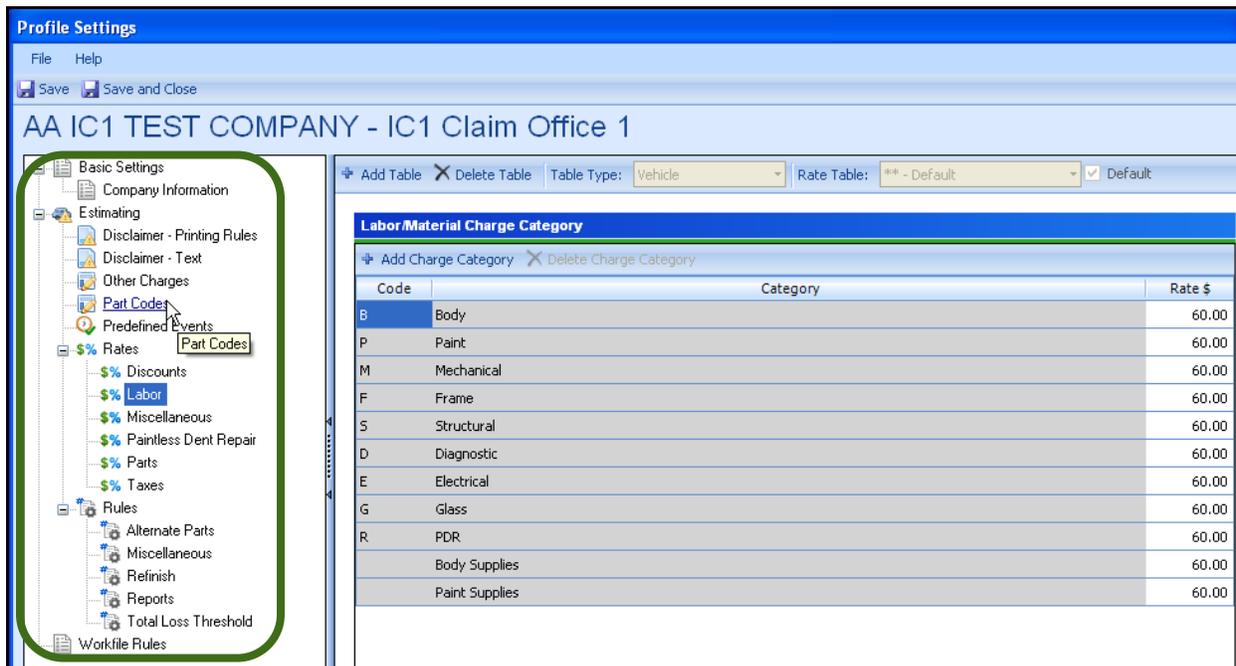
## Setup Job Aid: Profiles and Claim Offices, Continued

(continued)

Step	Action
3	<p>The system creates the new Claim Office Profile with CCC's defaults, and then asks if you want to open the assignment using this profile.</p> <p>Click <b>Yes</b> to continue or <b>No</b> if you need to update the Claim Office Profile with <b>rates</b> first.</p> 

**Important! Verify the rates and rules are set up properly PRIOR to opening the workfile. To do this, go to Configure Profiles.**

To edit the Claim Office Profile first, click **NO**. When you return to the main view, go to **Configure > Profiles** and select the appropriate Claim Office Profile. The Profile displays for you to update as needed. Then return to the Workfiles View to open the assignment as normal.



Code	Category	Rate \$
B	Body	60.00
P	Paint	60.00
M	Mechanical	60.00
F	Frame	60.00
S	Structural	60.00
D	Diagnostic	60.00
E	Electrical	60.00
G	Glass	60.00
R	PDR	60.00
	Body Supplies	60.00
	Paint Supplies	60.00

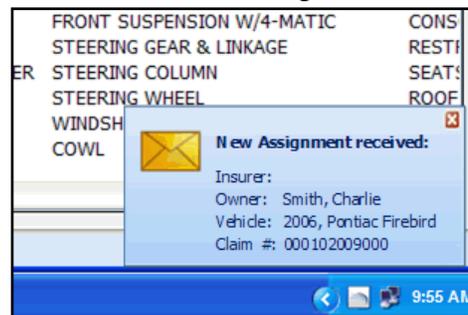
## Workflow Job Aid: Assignment Retrieval

**Purpose** Assignments are now received automatically in CCC ONE®. A user must be logged into CCC ONE® to be notified of a new assignment. This Job Aid describes the three ways to identify new assignments.

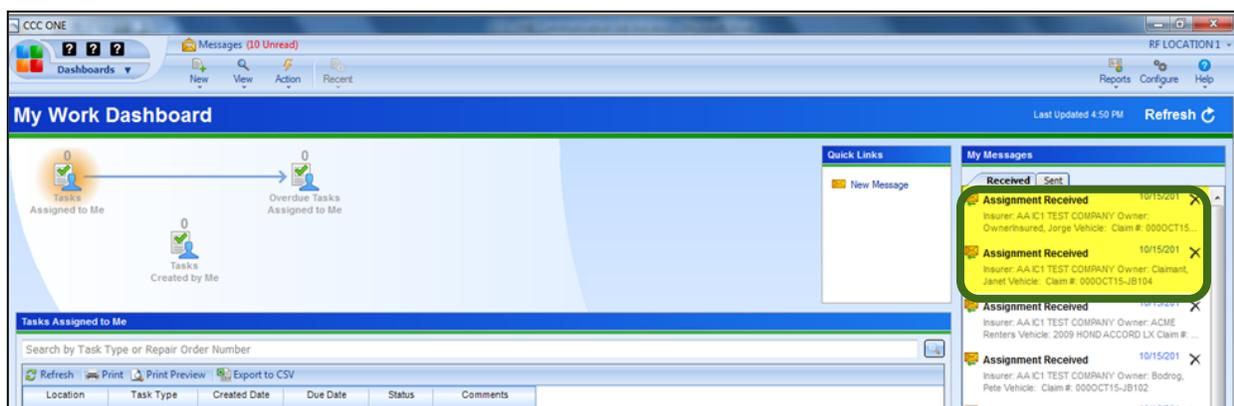
**Assignment Notification Popup** By default, assignment notifications will only be delivered to admin users that have the **Edit User** permission. A Notification Group (or groups) must be configured in order for non-admin users to receive Insurance assignment notifications.

A popup in the bottom right corner of the application appears for each user designated within the Notification Group as well as all Admin users.

You can click on the assignment notification popup to view the assignment details. Assignment notifications can also be directed to specific users for specific insurance companies as described in the Setup Notification Groups section.



**Assignment Message** Each assignment notification appears as a message in the **My Work Dashboard**. You can select the message as well as open the assignment from within the message. New messages appear as an envelope opening at the top of the main screen regardless of the view selected.

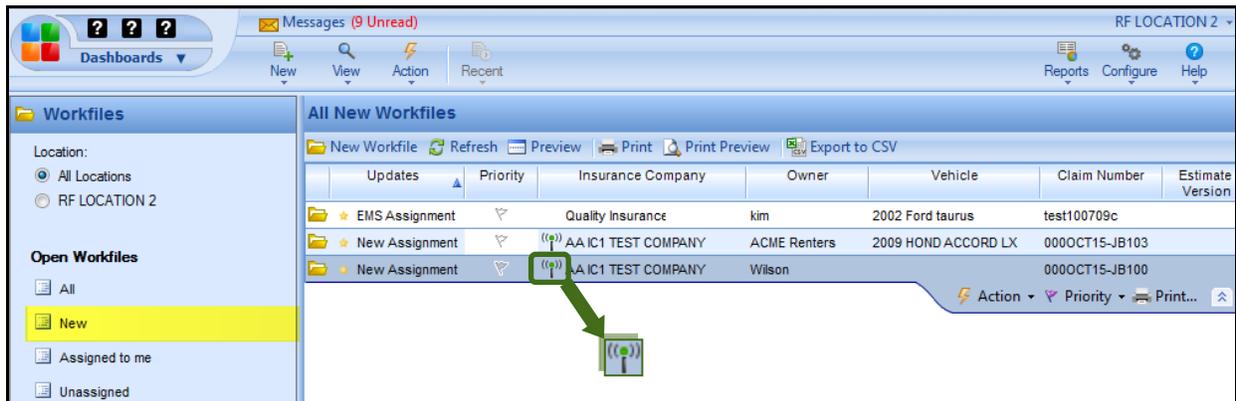


By default new assignment messages are delivered to all users. Assignment messages can be directed to specific users for specific insurance companies as described previously.

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## Workflow Job Aid: Assignment Retrieval, Continued

**New Workfile** New assignments will appear in the New Workfile view from within the Workfile List (select **View > Workfiles**).



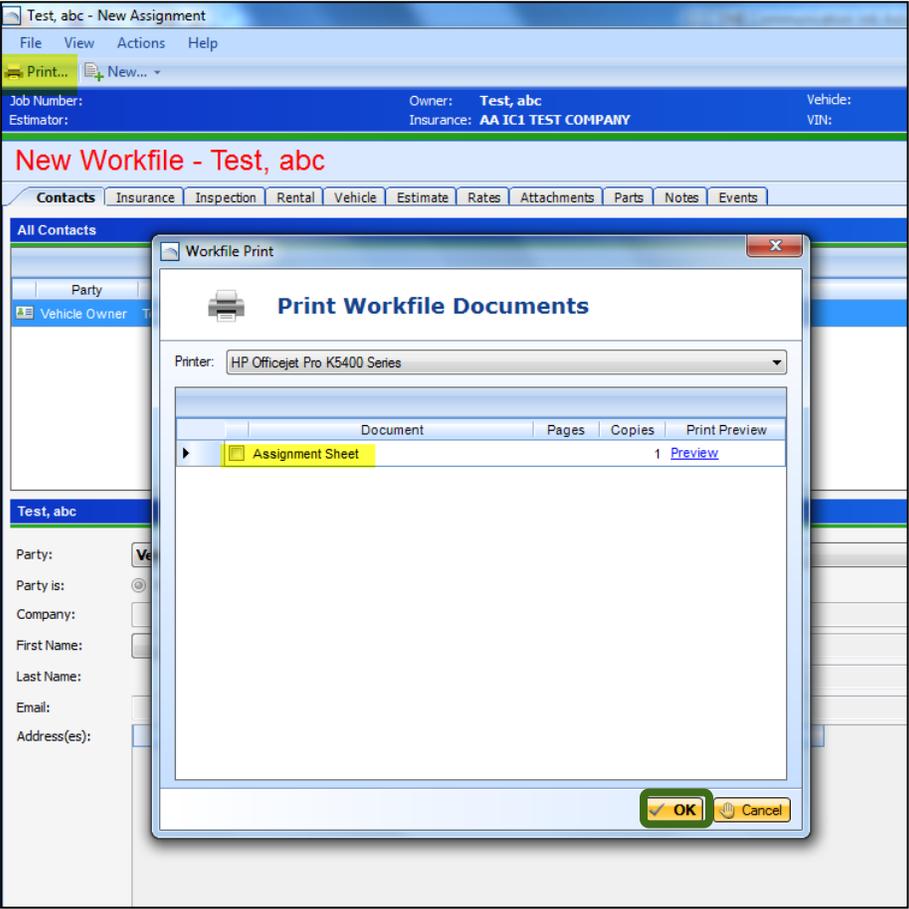
Assignments in the workfile list are easily identified by a green radio icon next to the Insurance Company name. The Insurance Company name field is a default column in the workfile list.

If this column is not visible, the user may select it from the column picker by right clicking on the column headers and selecting the Insurance Company.

## Workflow Job Aid: Printing Assignment

**Purpose** Repair facilities will no longer receive assignment notifications via fax. This Job Aid demonstrates the steps for printing an assignment notification in CCC ONE® Estimating.

**Procedure** Use the following steps to print an assignment:

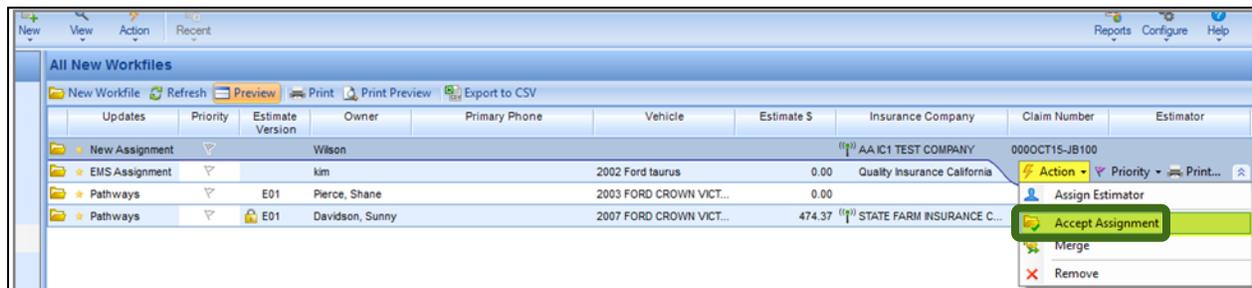
Step	Action
1	Locate and open the assignment workfile using any of the methods described in Assignment Retrieval section.
2	Click on <b>Print</b> and then select the “Assignment Sheet”.
	
3	Click the <b>OK</b> button.

This will print the assignment in the same format previously available when printing from fax.

## Workflow Job Aid: Accept Assignments

**Purpose** This Job Aid describes the two methods of accepting assignments. This will remove the assignment from the **New Filter** on the Search panel.

**Workfile Procedure** Right click on the assignment in the workfile view or click on the mini-tool bar for that assignment workfile and select **Action > Accept Assignment**.



This will remove the assignment from the **New** view and it will only be visible in the **All** view.

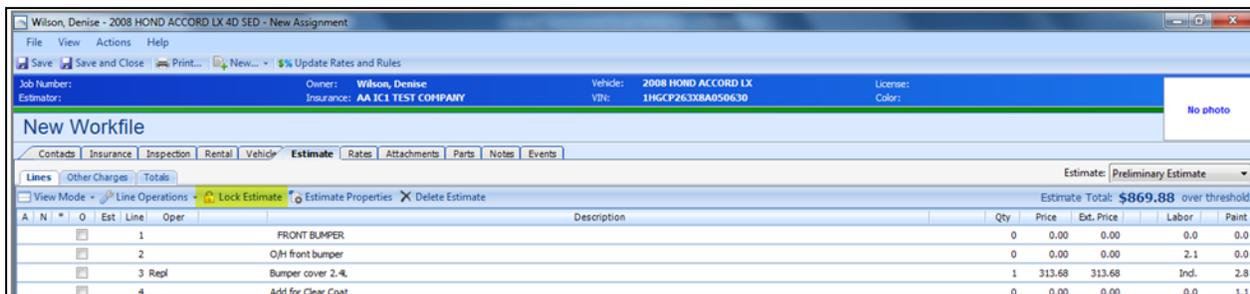
**Assignment Retrieval** Open the assignment using any of the methods described in Assignment Retrieval section. Click on **Save** or **Save and Close** from the menu bar.

This will remove the assignment from the **New** view. Going forward, the workfile will be visible in the **All** view. It could also appear in the **Assigned to me** or **Unassigned** views depending on who is assigned as the estimator.

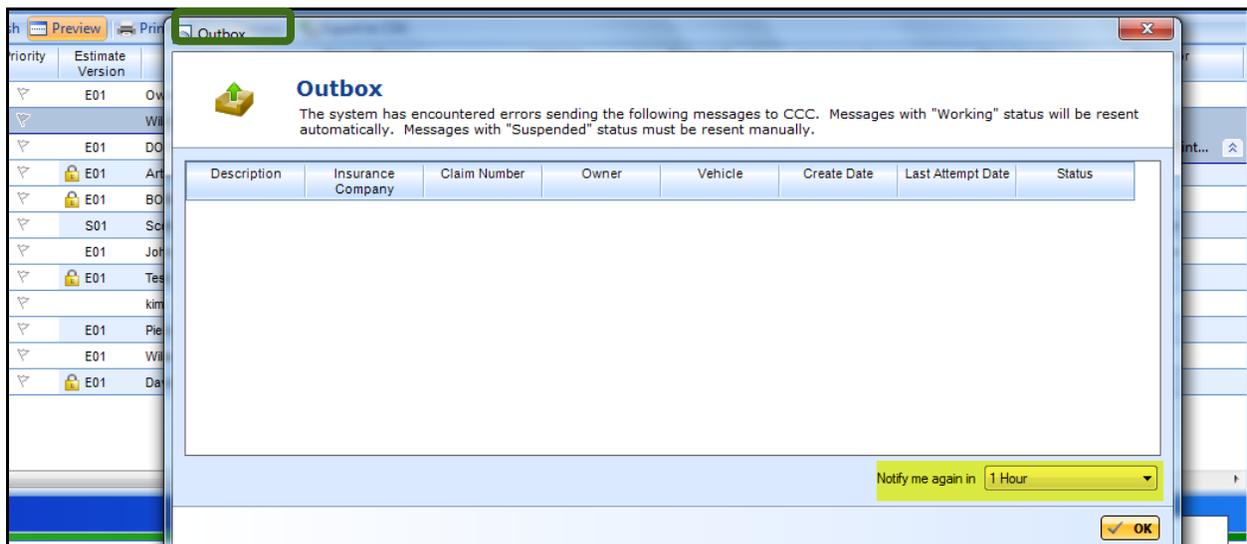
## Workflow Job Aid: Upload Locked Estimate or Supplement

**Purpose** This Job Aid describes how uploading an estimate or supplement works in CCC ONE®.

**Automatic Upload** Once the estimate or supplement is complete, selecting **Lock** from the toolbar in the Workfile Estimate tab will automatically queue the estimate for delivery. The locked estimate or supplement will be sent automatically in the background while the user is still working in CCC ONE®.



**Note:** If the estimate fails to send within 2 hours, you will be notified. The Outbox appears automatically and you can choose the duration to be notified again (30 min, 1 hour, 2 hours, 1 Day).



Estimates with **Working** status will be resent automatically. Estimates with **Suspended** status must be resent manually from the Outbox. To view the Outbox select Help from the main system view and Outbox.

## Workflow Job Aid: Upload Images

### Purpose

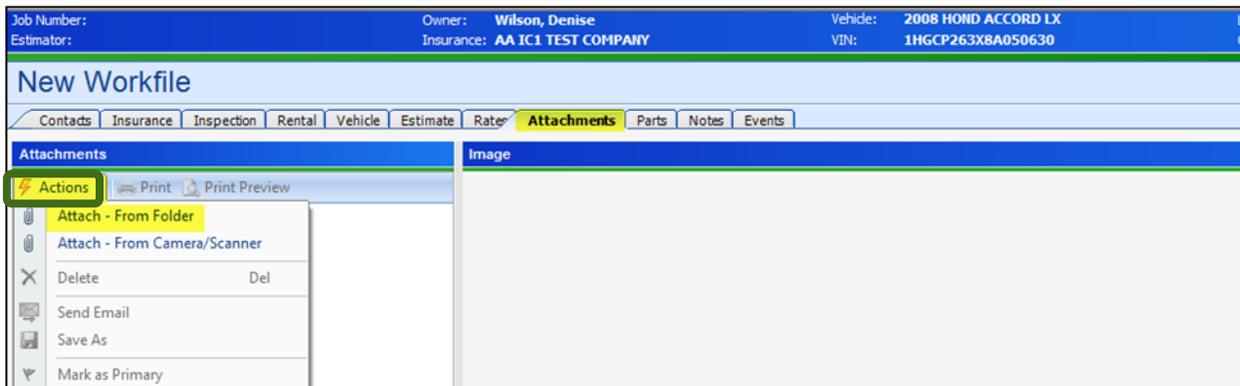
CCC ONE® allows you to store multiple attachment and document types (i.e. JPEG, Adobe PDF, Microsoft Word Doc, etc). You can also designate which images are uploaded to the Insurance Company. This Job Aid demonstrates how to upload images.

**Important!** Only .jpg and PDF files may be uploaded to Insurance Companies at this time. CCC ONE® will automatically resize images to reduce the size of each image optimizing the number of images that may be stored and sent.

### Procedure

Use the following steps to attach workfile images:

Step	Action
1	Open desired workfile and go to the <b>Attachments</b> tab.



2	On the Attachments tab, click on <b>Actions &gt; Attach From Folder</b> .
3	Browse to the proper folder where you have previously transferred images from a digital camera.
4	Select one or multiple images by holding down the CTRL-Key and selecting the desired images.
5	Click <b>Open</b> .
6	<b>Alternatively</b> , images may be selected directly from a digital camera that is recognized by the computer (i.e. via USB cable) by selecting <b>Action &gt; Attach from Camera or Scanner</b> . Select the device (digital camera) and then select the images from the device.

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## Workflow Job Aid: Upload Images, Continued

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### Describing Images

To describe each image. Select the image thumbnail and enter a description of the image in the Notes field at the bottom of the Attachments View. This is the only information insurance companies will see. Changes to the image labels directly under the image or attachment is not visible by the Insurance Company.

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### Sending Images

By default, images are marked to be sent to the Insurance Company. To *deselect* an image to be sent to the Insurance Company, locate the image thumbnail within the Attachments View and select the **Do Not Send to Insurance** in the drop down below.



Images will be sent to the Insurance Company once the estimate or supplement is locked.

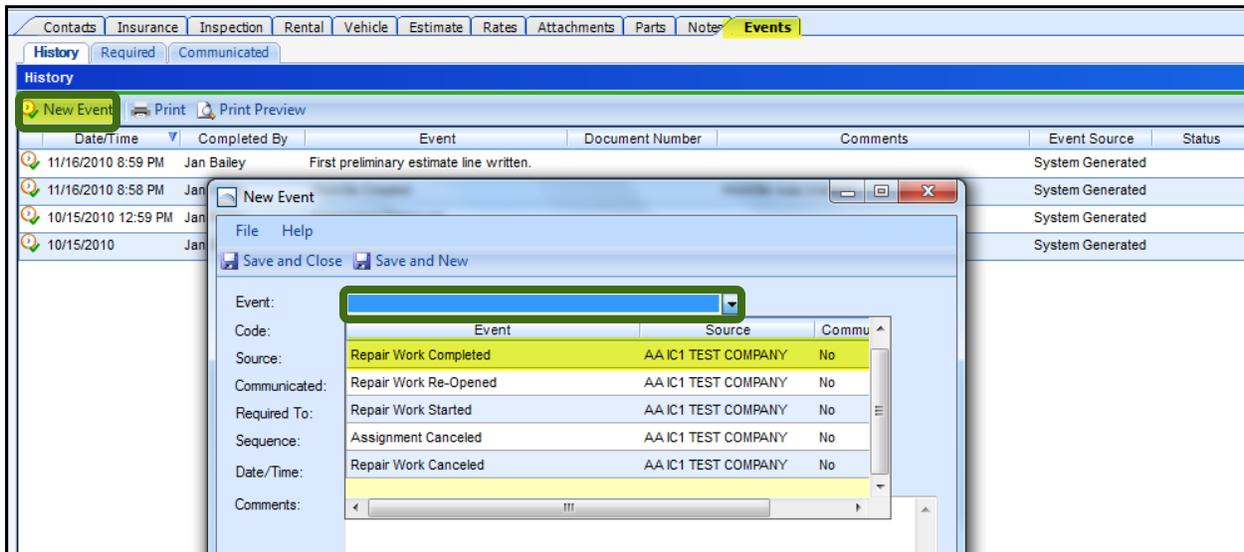
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## Workflow Job Aid: Add an Event to a Workfile

**Purpose** Events are used to communicate information to Insurance Companies in CCC ONE<sup>®</sup> just as they were in CCC Pathways<sup>®</sup>. This Job Aid describes how to add an Event to a workfile.

**Procedure** Use the following steps to add an Event to a workfile:

Step	Action
1	Locate and open the desired workfile.
2	Click on the <b>Event</b> tab within the workfile. The Event tab displays.
3	From the toolbar, click on <b>New Event</b> .



4	Select the desired event from the Event drop down menu.
5	Enter any additional information or comments that are required for the Event.

All Events are stored in the workfile and Events that are set to be communicated are sent automatically once the workfile is saved. The other events are stored in the workfile and sent when the estimate is locked.

## Workflow Job Aid: Receive Autoverse Messages

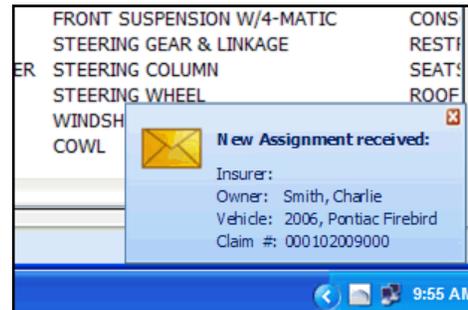
### Purpose

Autoverse messages are sent by Insurers to Repair Facilities. These messages are now received automatically within CCC ONE®. This Job Aid describes the three ways to view these messages.

### Message Notification Popup

By default, Autoverse message notifications will only be delivered to Admin users that have the **Edit User** permission. A Notification Group (or Groups) must be configured in order for non-Admin users to receive Autoverse message notifications.

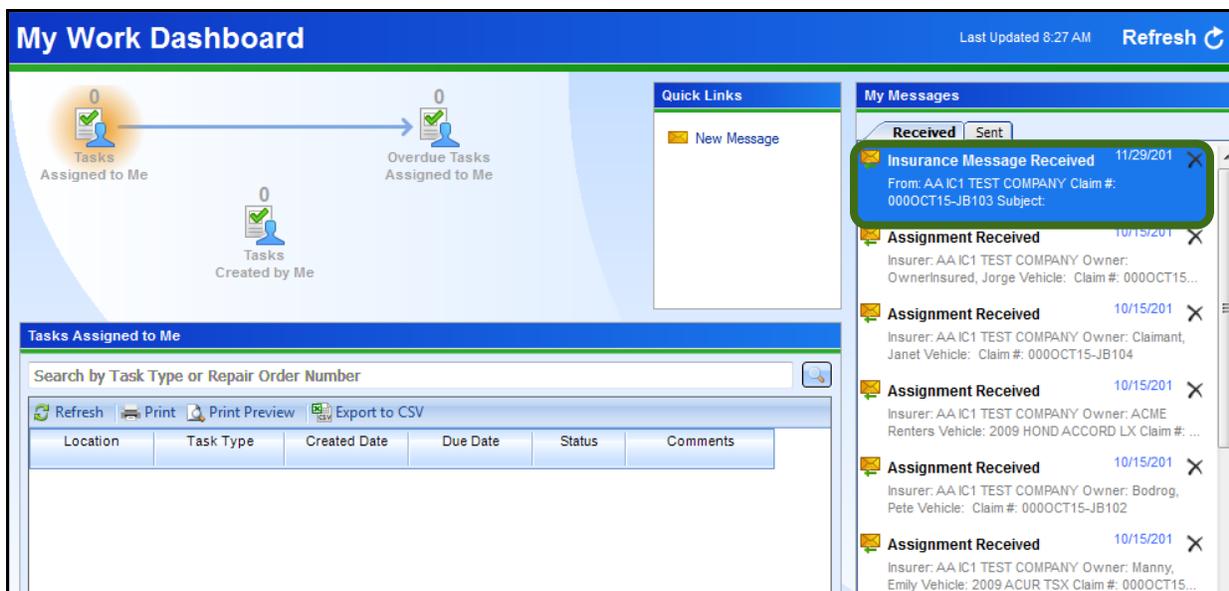
A popup in the bottom right corner of the application appears for each user designated within the Notification Group as well as all Admin users.



Message notifications can be directed to specific users for specific insurance companies as described in the Setup Job Aid for Notification Groups.

### Message Center

Each assignment notification will appear as a message in the **My Work Dashboard**. The message may be selected from the message center to view the message details.



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## Workflow Job Aid: Receive Autoverse Messages, Continued

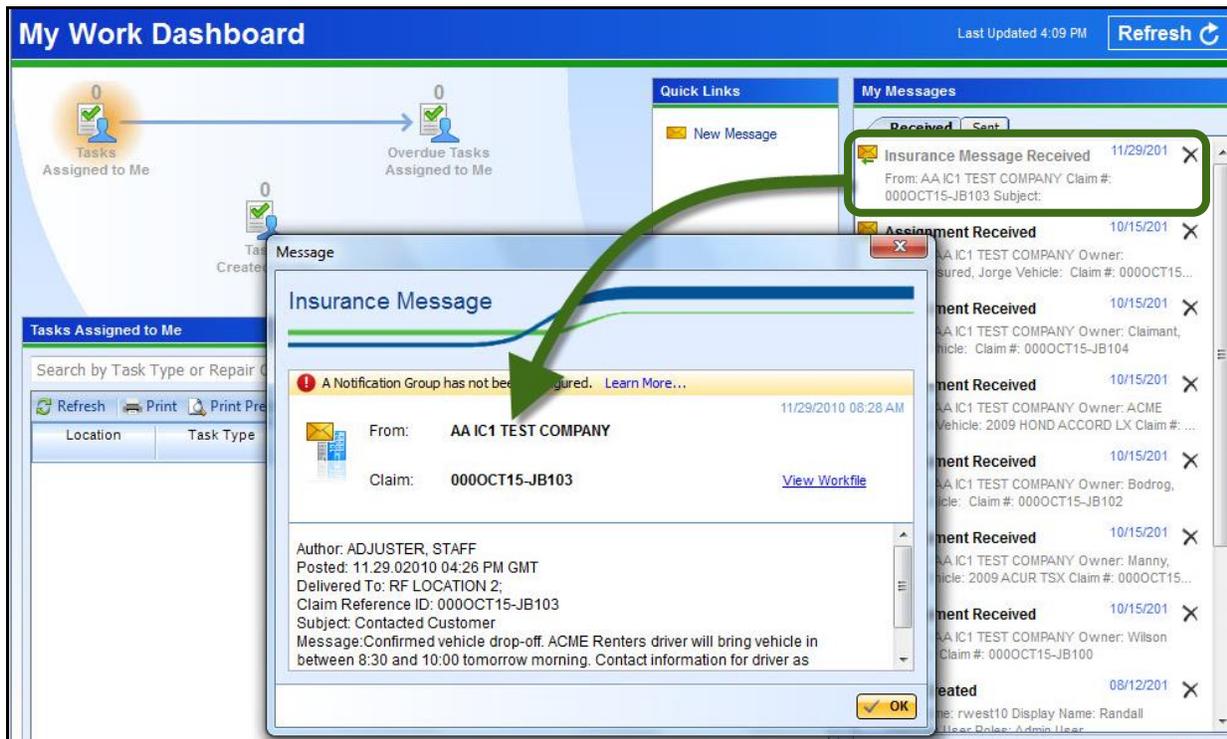
### Message Center (continued)

New messages appear as an envelope opening at the top of the primary CCC ONE® application screen regardless of the view that is selected.



By default new messages are delivered to all users. You can also set up Notification Groups as shown in the Setup section.

You can create and direct Autoverse messages to specific users for specific insurance companies as described in setup.



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## Workflow Job Aid: Receive Autoverse Messages, Continued

**Notes View** From within the workfile, you can select the Notes tab, and then select Insurance Messages to view all CCC ONE® Messages for that workfile.



**Predefined Event Message** To reply to these messages, create a new Event type called **Autoverse Message** in the Event Tab. Then add the Event to the workfile with your message. The event will be communicated when the workfile is saved.

