Request Valuation

Introduction

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

Note: The process is the same for CCC ONE Estimating Users. The only difference for submitting a total loss is that Workfile is called an Opportunity or Repair Order.

Before You Begin

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

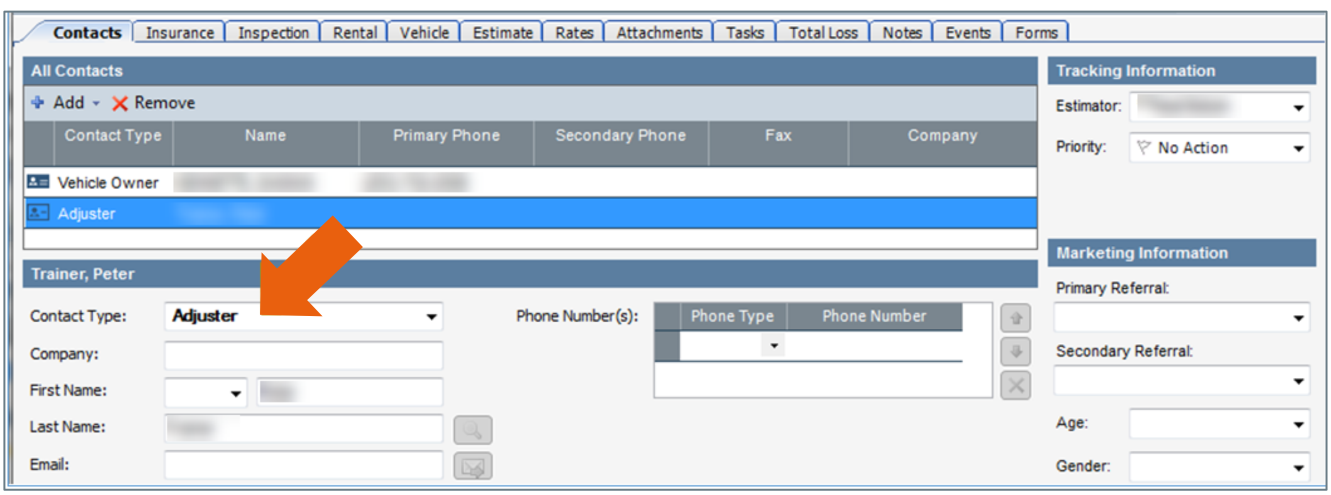
- **Contacts Tab:** Insured, Adjuster information must be added
- **Vehicle Tab:** VIN

Note: Contact and Vehicle 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, go directly to the **Total Loss** Tab.

Contacts Tab

Enter the following information.

Step	Action
1	Add **Insured Last Name**.
2	Add the **Adjuster**.
3	Add all of the Adjuster's pertinent information.



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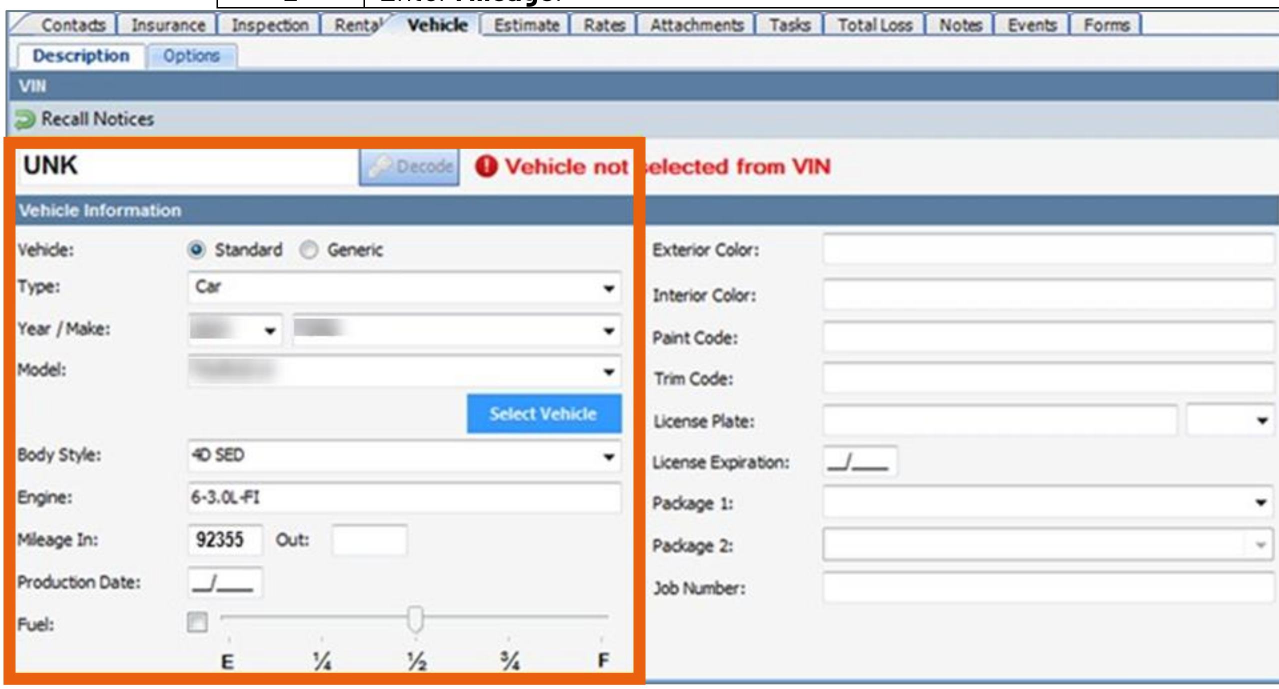
Vehicle Tab: Description

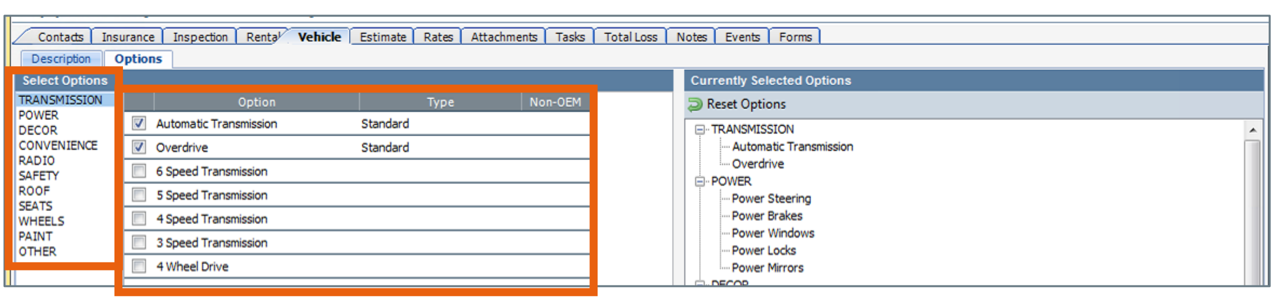
Enter the following Vehicle Description information.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Enter VIN and all related Vehicle information.
<table>
<tr><th>If…</th><th>Then…</th></tr>
<tr><td>VIN is known</td><td>Enter the VIN and decode it. If it decodes correctly, a Good VIN message displays.</td></tr>
<tr><td>VIN is not known</td><td>Enter UNK and click Select Standard Vehicle. Select a vehicle from the list.</td></tr>
</table></td></tr>
<tr><td>2</td><td>Enter Mileage.</td></tr>
</table>



Vehicle Tab – Options

For each category listed on the right, check the applicable options. A summary of selections is listed on the left for reference.



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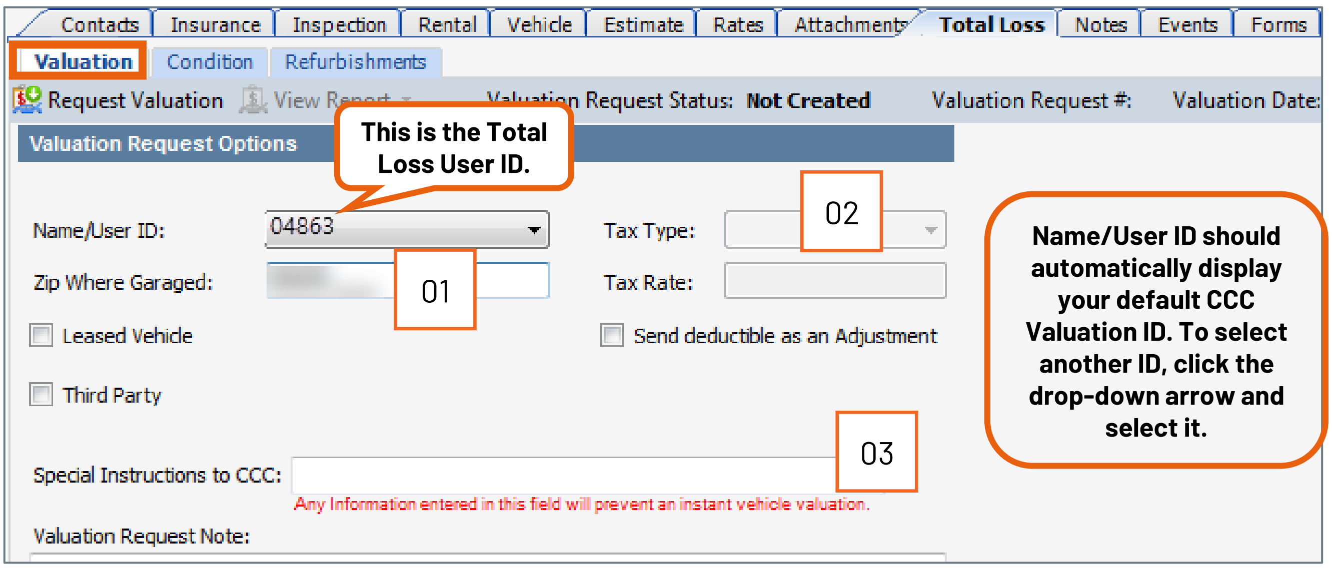
Request Procedure

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.

Perform the following steps in the **Valuation** section under the Total Loss tab.



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>The Zip Code where the Loss Vehicle is garaged is entered also on the workfile Contacts Tab.</td></tr>
<tr><td>2</td><td>Enter Tax information.
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Tax Type</td><td>Default selection is Auto Tax, which allows CCC to calculate Sales Tax based on the Loss Zip Code.</td></tr>
<tr><td>Send Deductible as an Adjustment</td><td>Check this box on every valuation so the deductible is applied appropriately.</td></tr>
</table></td></tr>
<tr><td>3</td><td>You can enter information into the Special Instructions to CCC field.
Note: This will result in the Valuation not being completed instantly. A Valuator will need to manually review the Special Instructions.</td></tr>
</table>

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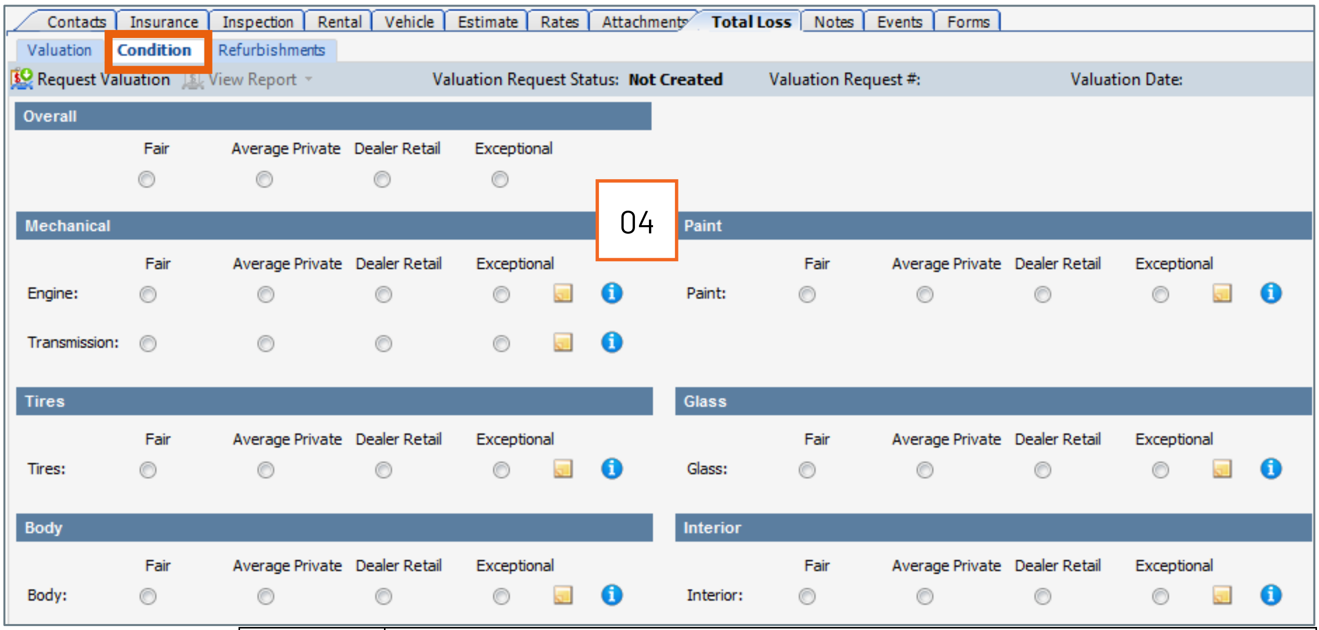
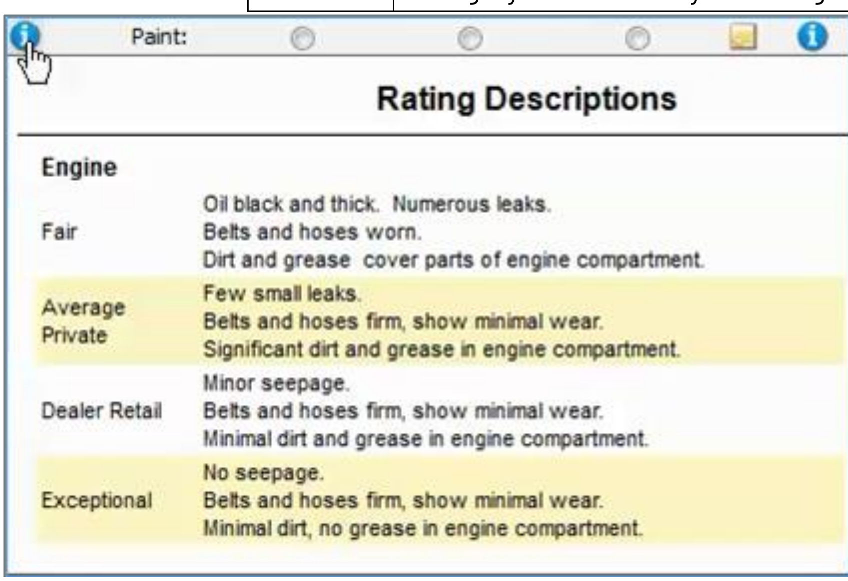
Request Procedure, continued

Perform the following steps in the **Condition** section under the Total Loss tab.



Step	Action
4	Complete the **Condition** sub tab to indicate the Vehicle's current condition. Once you select an **Overall Condition**, you can change a specific category's Condition by selecting a different option in that Category.



	Use the **Note** icon to add details to a Category selection.
	Use the **Information** icon to Insurer-specific **Rating Descriptions** for each Category prior to making your selections if needed.

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Request Valuation, Continued

Submit Request

Once you have entered all the necessary information, perform the following steps to complete the request.

Step	Action
1	Return to the **Valuation** sub tab.
2	Once you have completed all required information, click the **Request Valuation** button on the toolbar.
3	You will receive notification that the Request was submitted. The status on the workfile will change: 
4	When the Valuation Report is returned, click **View Report** on the **Total Loss** tab, or go to the **Attachments** tab on the Workfiles View Preview pane to view the PDF copy. **Note:** Some Insurers do not allow the Shop to receive the completed Valuation.