

Working with Customers in CCC ONE®

Overview

Introduction The job aids within this document review topics associated with creating and maintaining Customers in CCC ONE®.

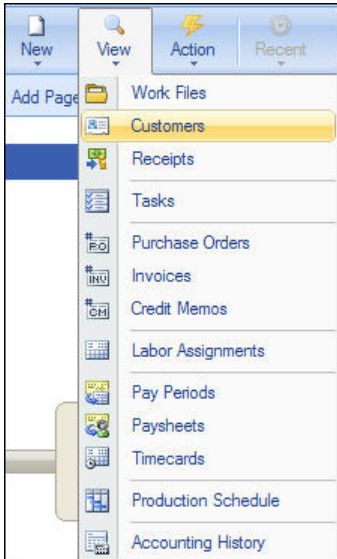
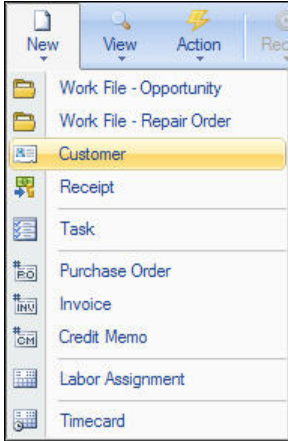
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The Customers Search Screen in CCC ONE®

Introduction This document reviews the steps necessary to access the Customers Search screen within CCC ONE® and an overview of the New Customers window.

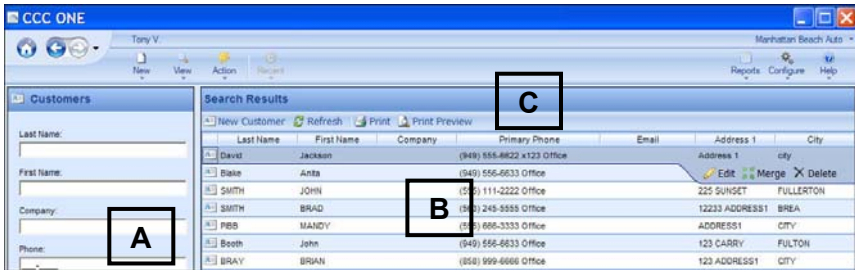

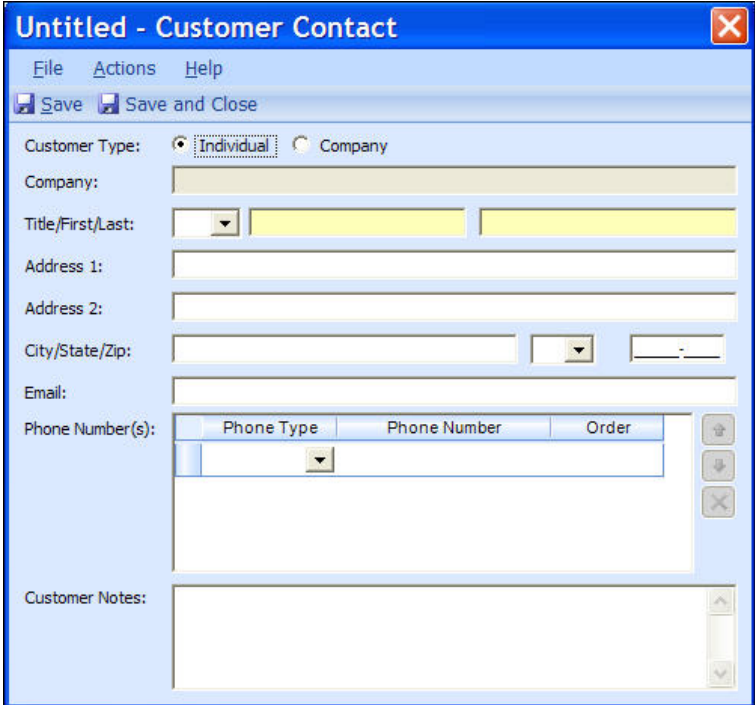
Accessing the Customers Search Screen Use the following steps to access the Customers Search screen:

Step	Action
1	<p>Go to the View Menu and select Customers from the drop down menu.</p>  <p>Or, from the CCC ONE® Home page, go to the New Menu and select Customer. This method opens the New Customers window on top of the Home Page. Skip to step # 4.</p> 

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The Customers Search Screen in CCC ONE®, Continued

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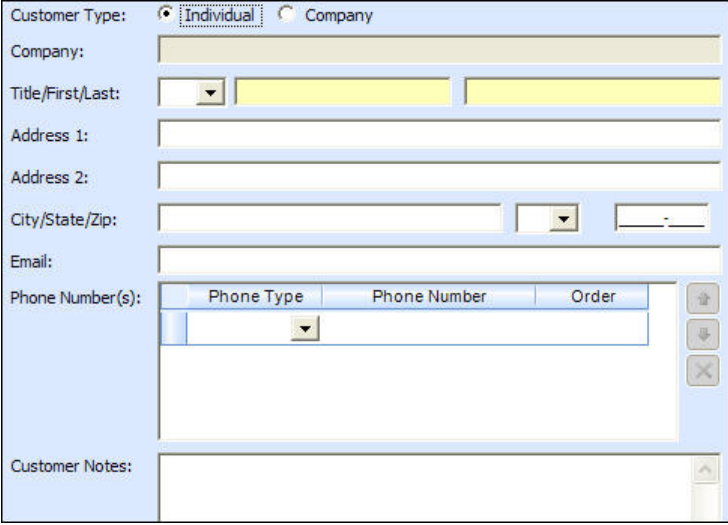
Step	Action
2	<p>The Customers Search Screen opens:</p>  <p>A. Customers Search Panel B. The Search Results Panel C. The Customers Screen toolbar: New Customer, Refresh, Print, Print Preview buttons.</p>
3	<p>Click on the New Customers button on the toolbar.</p> 
4	<p>The New Customer Contact window opens. Using this form is reviewed in the next section of this document.</p> 

How to Create a New Customer Contact

Introduction This document reviews the steps necessary to fill out the New Customer Contact form within CCC ONE®.

Note: There are system required fields as well as required fields determined by the administrator of this product and are customizable. To review required fields, go to *Configure > Global Settings > Customer Contact, Create / Edit*. For additional information on customizing Customers fields, please refer to the job aid on Global Settings.

Create Customer Enter information on the form shown below to create a New Customer Contact, This table reviews the information needed on the form:

Step	Action
1	<p>Enter the following information.</p>  <ul style="list-style-type: none"> • Customer Type: If you choose Company, the Company field becomes available to add a Company Name if desired. • Customers Name • Address • City/State/Zip • Email/Phone Number • Customer Notes: Free text field to add information to this Contact. <p>Note: Required fields are indicated by a yellow background.</p>
2	Click Save or Save and Close if you want to create another New Customer Contact.



How to Search for an Existing Customers

Introduction

This job aid reviews the steps to search for existing Customers within CCC ONE®.

Search for Customers


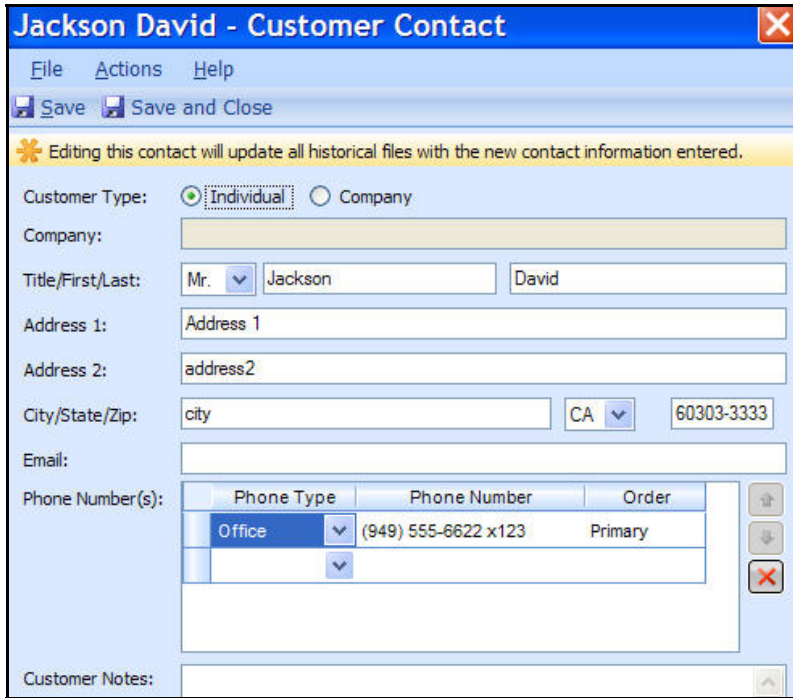

Use the following steps to search for an existing Customers:

Step	Action
1	Go to View > Customers.
2	<p>The Customers Search criteria are located on the left side of the screen.</p> 
3	<p>Enter any of the following criteria:</p> <ul style="list-style-type: none"> • Last Name • First Name • Company • Phone Number
4	<p>Click the Search button. The Search Results display to the right.</p> 

How to Edit an Existing Customer Contact

Introduction This job aid reviews how to edit an existing Customer Contact.


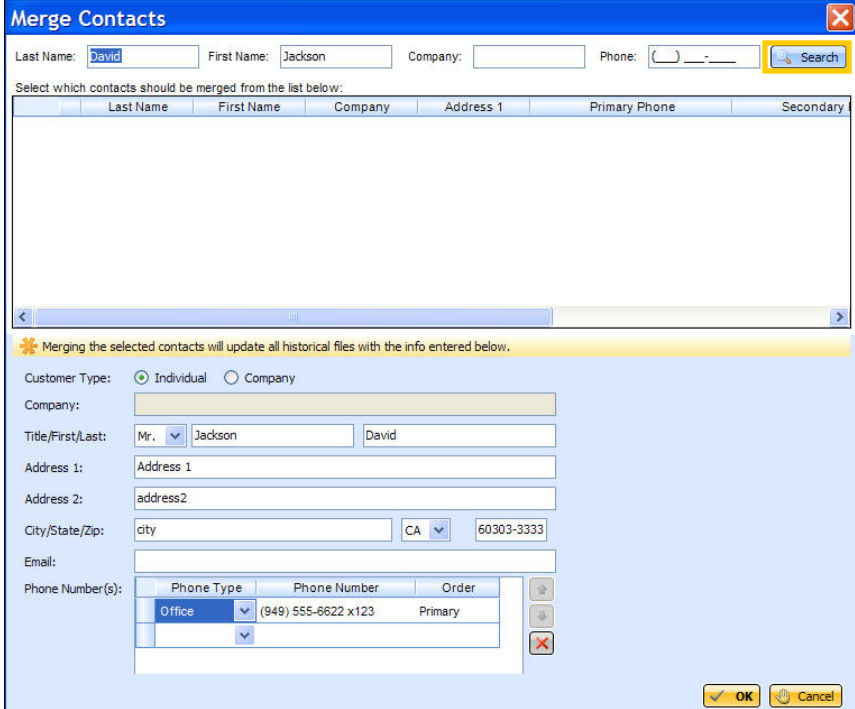
Edit Existing Customer Contact Use the following steps to edit an existing Customers:

Step	Action
1	Go to the View Menu > Customers.
2	Double click on the Customer or click Edit on the mini toolbar. 
3	The Customer Contact window opens. Navigate to desired fields and make any necessary changes. 
4	Once you have entered all of the information required, click the Save and Close button at the top of the screen:  <p data-bbox="1062 1696 1396 1797">Note: You can click Save and New to open a New Contact window.</p>

How to Merge Customer Contacts

Introduction This job aid reviews how to merge two existing Customer Contacts.

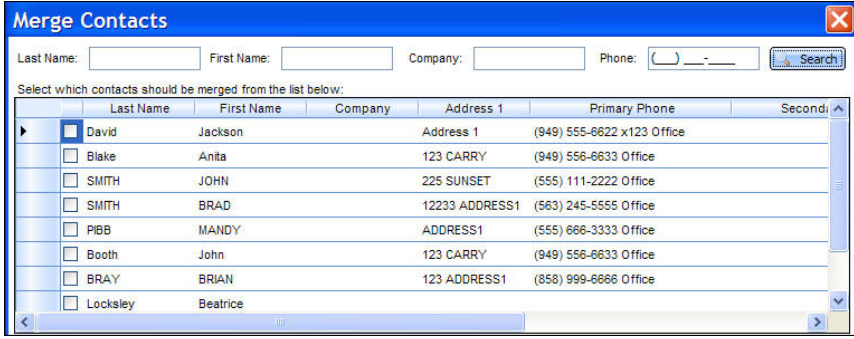
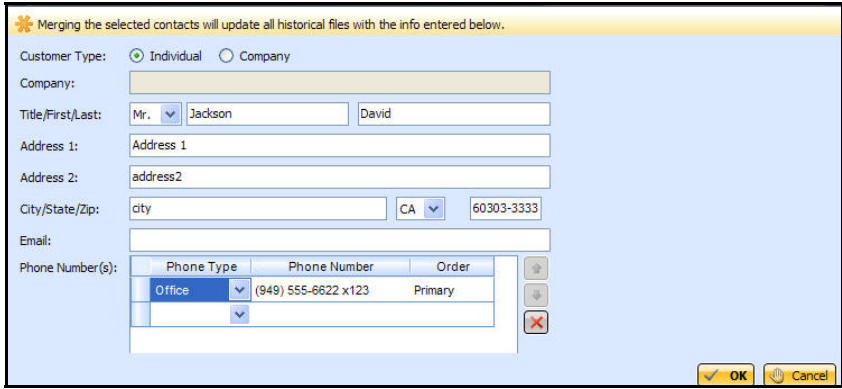
Merge Customer Contacts Use the following steps to merge Customer Contacts:

Step	Action
1	Go to the View Menu > Customers.
2	Click Merge on the mini toolbar. 
3	The Merge Contacts window opens. This window has two sections: <ul style="list-style-type: none"> • Search: Locate Contact to merge with this Contact. • Merged Contact Information: Displays data that will be used for the merged Contact for you to edit if needed. 

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How to Merge Customer Contacts, Continued


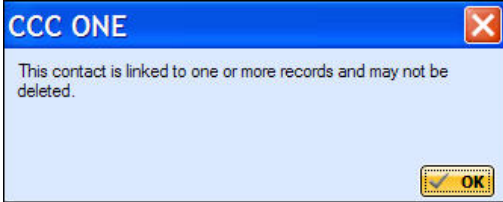
Deactivate a Customers (continued)

Step	Action																																																															
4	<p>Enter search criteria to locate the other Customer Contact you want to merge with this one OR no criteria and click the Search button. All available Customer Contacts will display.</p>  <table border="1" data-bbox="560 573 1386 800"> <thead> <tr> <th></th> <th>Last Name</th> <th>First Name</th> <th>Company</th> <th>Address 1</th> <th>Primary Phone</th> <th>Secondary</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>David</td> <td>Jackson</td> <td></td> <td>Address 1</td> <td>(949) 555-6622 x123 Office</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Blake</td> <td>Anita</td> <td></td> <td>123 CARRY</td> <td>(949) 556-6633 Office</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>SMITH</td> <td>JOHN</td> <td></td> <td>225 SUNSET</td> <td>(555) 111-2222 Office</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>SMITH</td> <td>BRAD</td> <td></td> <td>12233 ADDRESS1</td> <td>(563) 245-5555 Office</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>PIBB</td> <td>MANDY</td> <td></td> <td>ADDRESS1</td> <td>(555) 666-3333 Office</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Booth</td> <td>John</td> <td></td> <td>123 CARRY</td> <td>(949) 556-6633 Office</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>BRAY</td> <td>BRIAN</td> <td></td> <td>123 ADDRESS1</td> <td>(858) 999-6666 Office</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>Locksley</td> <td>Beatrice</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Last Name	First Name	Company	Address 1	Primary Phone	Secondary	<input checked="" type="checkbox"/>	David	Jackson		Address 1	(949) 555-6622 x123 Office		<input type="checkbox"/>	Blake	Anita		123 CARRY	(949) 556-6633 Office		<input type="checkbox"/>	SMITH	JOHN		225 SUNSET	(555) 111-2222 Office		<input type="checkbox"/>	SMITH	BRAD		12233 ADDRESS1	(563) 245-5555 Office		<input type="checkbox"/>	PIBB	MANDY		ADDRESS1	(555) 666-3333 Office		<input type="checkbox"/>	Booth	John		123 CARRY	(949) 556-6633 Office		<input type="checkbox"/>	BRAY	BRIAN		123 ADDRESS1	(858) 999-6666 Office		<input type="checkbox"/>	Locksley	Beatrice				
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7	Click the OK button to merge the selected Customer Contacts with this Contact.																																																															

How to Delete An Existing Customer Contact

Introduction This job aid reviews how to delete a Customer Contacts.

Delete Customer Contact Use the following steps to delete a Customer Contact:

Step	Action
1	Go to View Menu > Customers.
2	<p>Click Delete on the mini toolbar.</p>  <p><i>If the Customer Contact is not associated with any other record</i> in the system, it will be deleted and cannot be recovered.</p> <p><i>If the Customer Contact is linked with another record</i> in the system, you will receive the following warning:</p>  <p>This means that the Contact has other data linked to it and the system will not allow you to delete it. Click OK to return to the Search Results.</p>