

# Working with Location Settings in CCC ONE®

## Overview

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### Introduction

The job aids within this document identify the Locations Settings that can be customized to pre-determined defaults in CCC ONE® and how to make those changes.

The Locations Settings window divides the features that can be configured into the following categories:

- Additional Info
  - Admin
  - Estimate, Account Mapping
  - Opportunity, Settings
  - Parts, Settings
  - Repair Order, Print
  - Repair Order Settings
  - Repair Plans
  - Sales, Settings
  - Tasks, Settings
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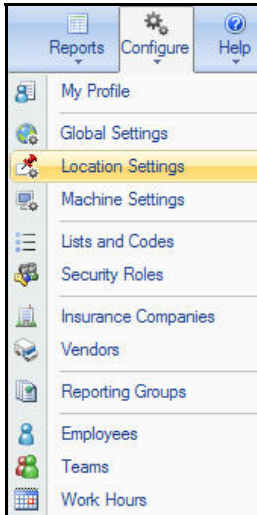
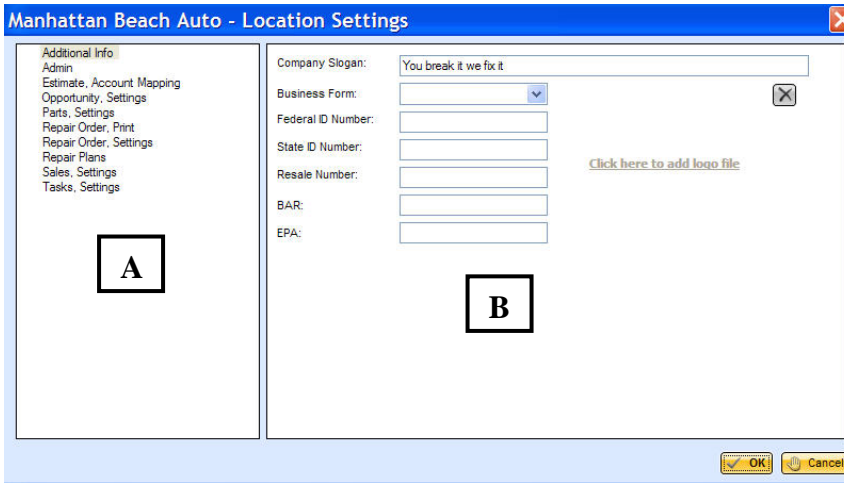
# The Location Settings Screen in CCC ONE®

## Introduction

This document reviews how to access the Location Settings that can be configured for CCC ONE®.

## Accessing the Location Settings

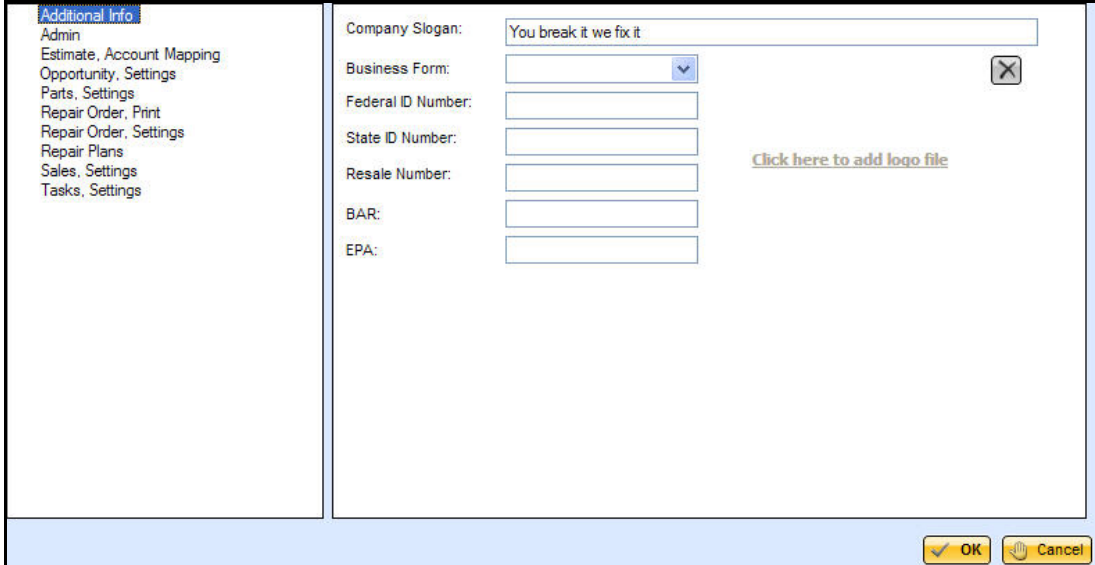
Use the following steps to access the Location Settings window:

Step	Action
1	<p>Go to the Configure Menu and select Location Settings.</p> 
2	<p>The Location Settings window opens.</p>  <p>A. Location Setting Categories</p> <p>B. Settings Fields that can be customized.</p>

# Customizing Location Settings: Additional Info

**Introduction** This job aid describes the first Location Setting category, Additional Info.

**Additional Info** Additional Info allows you to customize documents produced with CCC ONE® to include your Company’s slogans, ID numbers and logo as a default rather than having to re-enter the information each time. This table shows you the Additional Info fields that can be customized for your Location:

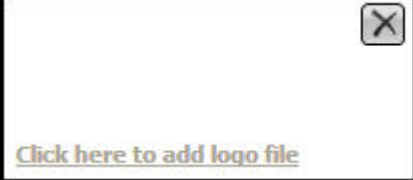
Step	Action
1	<p data-bbox="321 646 1317 709">Enter information in the Additional Info section of this screen to change what displays as a default under Locations.</p> <div data-bbox="321 730 1409 1291" style="border: 1px solid black; padding: 5px;">  </div> <p data-bbox="321 1312 1317 1381">The following fields can be customized by entering information in a text box, selecting information from a drop down list or using a check box:</p> <ul data-bbox="370 1402 1386 1705" style="list-style-type: none"> <li>• <b>Company Slogan</b></li> <li>• <b>Business Form:</b> Choose to leave this blank or Corporation, Partnership, or Sole Proprietorship.</li> <li>• <b>Federal ID Number</b></li> <li>• <b>State ID Number</b></li> <li>• <b>Resale Number</b></li> <li>• <b>BAR</b></li> <li>• <b>EPA</b></li> </ul> <p data-bbox="321 1747 1339 1816"><b>Note:</b> If any of these ID numbers are required to be printed on Repair Order estimates and Final Bills, here is where you can set it up to do so automatically.</p>

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## Customizing Location Settings: Additional Info, Continued

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### Additional Info (continued)

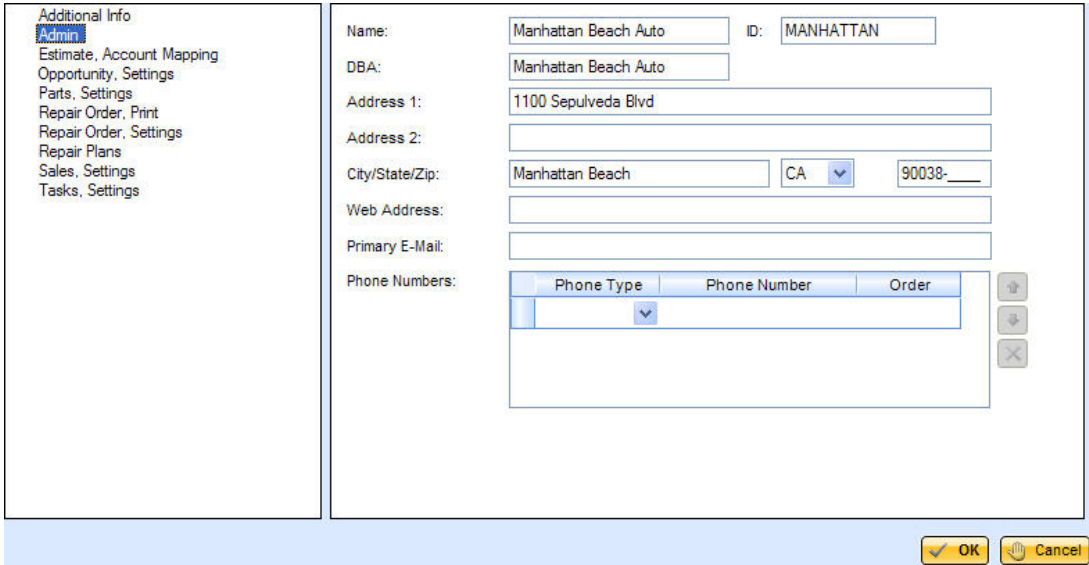
Step	Action
	<p data-bbox="548 394 1393 464">Once you enter the information here, it will automatically display as the default for this Location.</p> <div data-bbox="537 485 948 663"></div> <p data-bbox="971 485 1406 663"><b>Tip!</b> You can also add your Company Logo here so that it will display when the Location is displayed on documents. Use the X button to remove the file.</p> <p data-bbox="548 680 1000 716"><i>This feature will be available soon.</i></p>
2	If this is the only category you want to customize, click the OK button to save your changes. If not, go to the next category.

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# Customizing Location Settings: Admin

**Introduction** This job aid describes the Admin Location Settings category.

**General** Use the Admin category to enter contact information for this Location. Information entered in this tab is displayed on documentation printed from CCC ONE®. The Shop name is printed on almost all documents. Address and telephone information is included on POs and Credit Memos. This table shows you the Admin fields that can be customized for Locations:

Step	Action
1	<p>Enter information in the General section of this screen to change what displays as a default under Location.</p>  <p>The following fields can be customized by entering information in a text box, selecting information from a drop down list or using a check box:</p> <ul style="list-style-type: none"> <li>• <b>(Location) Name &amp; ID</b></li> <li>• <b>DBA</b></li> <li>• <b>Address</b></li> <li>• <b>City/State/Zip</b></li> <li>• <b>Web Address</b></li> <li>• <b>Primary E-mail</b></li> <li>• <b>Phone Numbers</b></li> </ul>

*Continued on next page*

## Customizing Location Settings: Admin, Continued

### General (continued)

Step	Action												
2	<p>Enter Phone Number information:</p> <div data-bbox="548 466 1401 653"><p>Phone Numbers:</p><table border="1"><thead><tr><th>Phone Type</th><th>Phone Number</th><th>Order</th></tr></thead><tbody><tr><td>Office</td><td>(312) 555-1234</td><td>Primary</td></tr><tr><td>Mobile</td><td>(312) 222-1234</td><td>Secondary</td></tr><tr><td></td><td></td><td></td></tr></tbody></table></div> <ul style="list-style-type: none"><li>• Use the drop down list to select Phone Type.</li><li>• Enter the Phone Number.</li></ul> <p><b>Note:</b> The first (non-fax) phone number entered is designated the Primary number. Use the arrow keys at right to change the order of the numbers listed. Use the red “X” to delete a phone number.</p>	Phone Type	Phone Number	Order	Office	(312) 555-1234	Primary	Mobile	(312) 222-1234	Secondary			
Phone Type	Phone Number	Order											
Office	(312) 555-1234	Primary											
Mobile	(312) 222-1234	Secondary											
3	<p>If this is the only category you want to customize or you are finished making changes, click the OK button to save your changes. If not, go to the next category.</p>												

# Customizing Location Settings: Estimate, Account Mapping

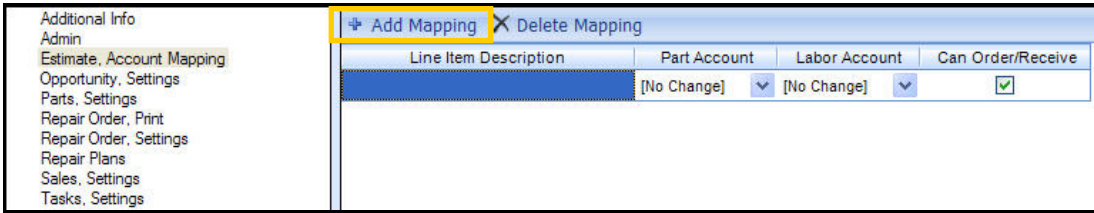
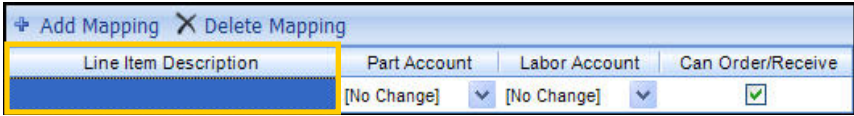
**Introduction** This job aid describes the Estimate, Account Mapping Location Settings category.

**Estimate, Account Mapping** Use Estimate, Account Mapping to identify standard Estimate Line Descriptions and associate those Line Descriptions to Part or Labor Accounts.

*Example #1:* Additional Operations from the Parts database such as Hazardous Waste, Cover Car, Color and Buff, etc. will show up in CCC ONE™ as a part to be ordered/received. Account mapping allows you to identify these types of items so that they do not show up as parts to be ordered/received.

*Example #2:* Insurance companies may request shops to input refinish operations as **Body** because the insurance company does not expect to pay for paint materials in some instances. However, the shop may still wants to allocate these items to the proper cost account for Paint Materials. This feature allows you to do that without affecting the estimate.

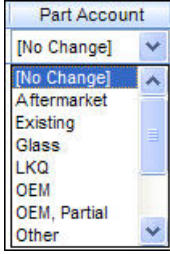

This table shows you the Estimate, Account Mapping fields that can be customized for Locations:

Step	Action
1	<p>Click the Add Mapping link to add a new Line Item Description.</p> 
2	<p>Enter the Line Item Description.</p> 

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## Customizing Location Settings: Estimate, Account Mapping, Continued

### Estimate, Account Mapping (continued)

Step	Action
3	Select a Part Account to associate with the Description. 
4	Select a Labor Account to associate with the Description. 
5	Deselect Can Order/Receive if needed. <b>Note:</b> If this option is unchecked, then any lines matching the specified line item description will NOT appear on POs, Invoices, or Credit Memos.
6	Repeat as needed to add Account Mappings.
7	If this is the only category you want to customize or you are finished making changes, click the OK button on the Locations Settings to save your changes. If not, go to the next category.

Line Item Description	Part Account	Labor Account	Can Order/Receive
	[No Change]	[No Change]	<input checked="" type="checkbox"/>

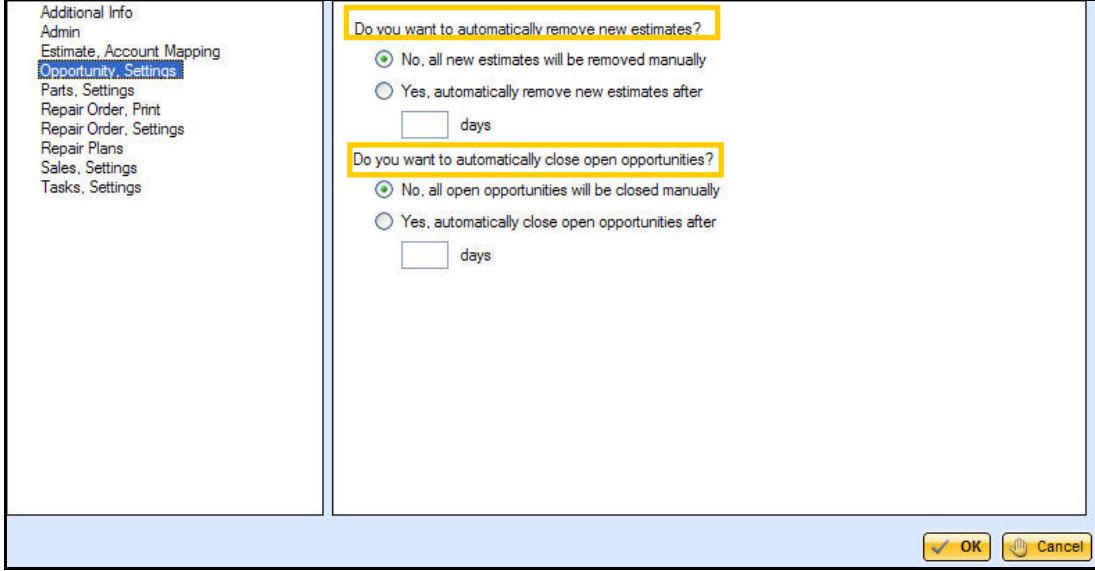
**Note:** Use Delete Mapping to remove a Line Item Description and Account Mapping from the Locations Settings.



# Customizing Location Settings: Opportunity, Settings

**Introduction** This job aid describes the Opportunity, Settings category.

**Opportunity, Settings** Use the Opportunity, Settings category to determine how to handle new estimates and open opportunities. This table shows you the options:

Step	Action
1	<p>To set the Opportunity, Settings, you must answer two questions:</p> <ul style="list-style-type: none"> <li>Do you want to automatically remove new estimates?</li> <li>Do you want to automatically close open opportunities?</li> </ul> 
2	<p>If you select Yes for either question, then you must specify the number of days after which to perform the action. <b>Example:</b> To close Open Opportunities after 5 days.</p>
3	<p>If this is the only category you want to customize or you are finished making changes, click the OK button on the Locations Settings to save your changes. If not, go to the next category.</p>

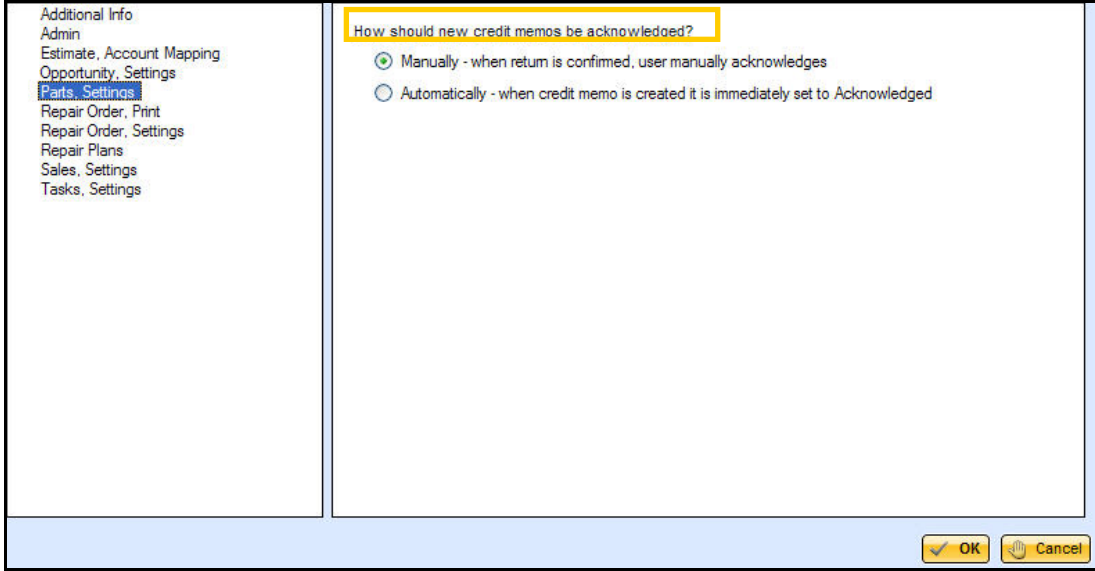
# Customizing Location Settings: Parts, Settings

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**Introduction** This job aid describes the Parts, Settings category.

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**Parts, Settings** Use the Parts, Settings category to determine how to handle how new credit memos are acknowledged. This table shows you the options:

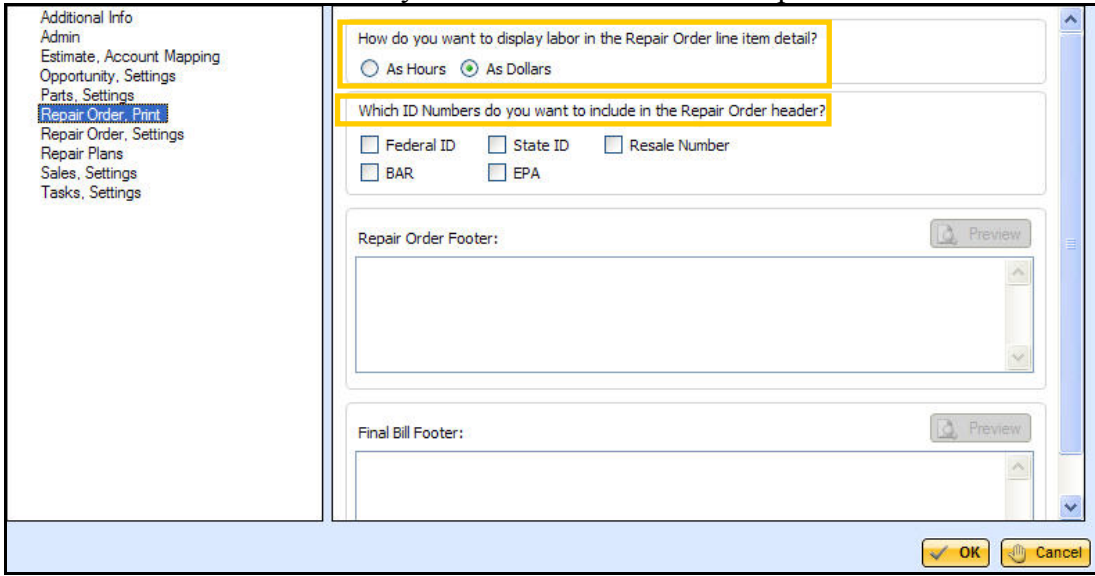
Step	Action
1	<p>Select whether you want credit memos to be acknowledged manually or automatically using the radio buttons. The default is Manually.</p> 
2	<p>If this is the only category you want to customize or you are finished making changes, click the OK button to save your changes. If not, go to the next category.</p>

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# Customizing Location Settings: Repair Order, Print

**Introduction** This job aid describes the Repair Order, Print category.

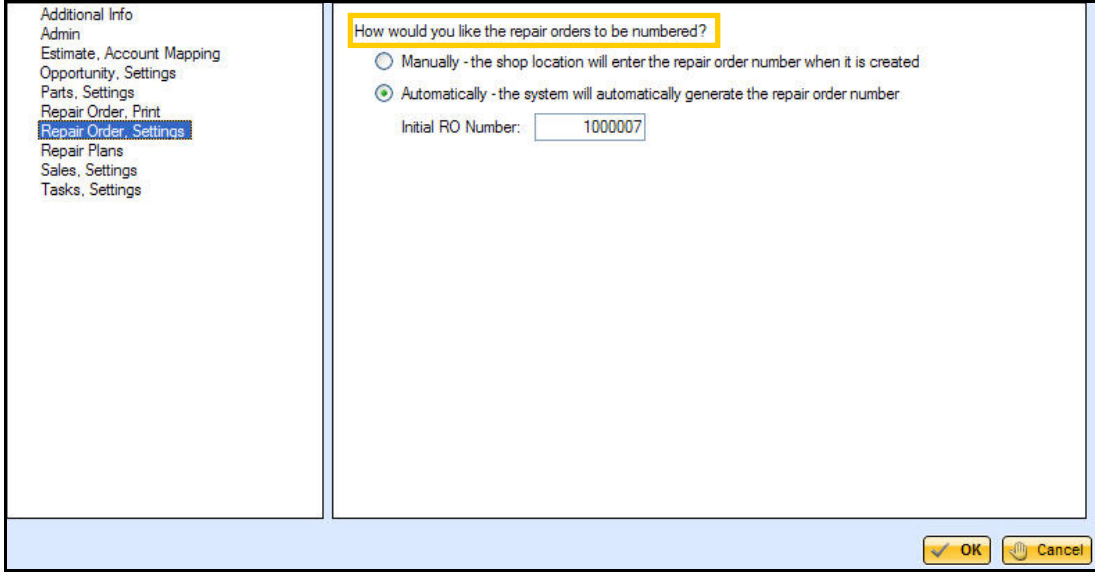
**Repair Order, Print** Use the Repair Order, Print category to configure how Repair Orders print. This table reviews how to set up Repair Order Printing defaults:

Step	Action
1	<p>Use the radio buttons and check boxes to answer the following two questions:</p> <ul style="list-style-type: none"> <li>• How do you want to display labor in the Repair Order line item detail?</li> <li>• Which ID Numbers do you want to include in the Repair Order header?</li> </ul> 
2	Enter desired text in the Repair Order Footer text field. This text will print at the bottom of all Repair Order Estimates.
3	Enter desired text in the Final Bill Footer text field. This text will print at the bottom of all Repair Order Final Bills.
4	If this is the only category you want to customize or you are finished making changes, click the OK button to save your changes. If not, go to the next category.

# Customizing Location Settings: Repair Order, Settings

**Introduction** This job aid describes the Repair Order, Settings category.

**Repair Order, Settings** Use the Repair Order, Settings category to determine how to generate Repair Order numbers for new repair orders. This table shows you the options:

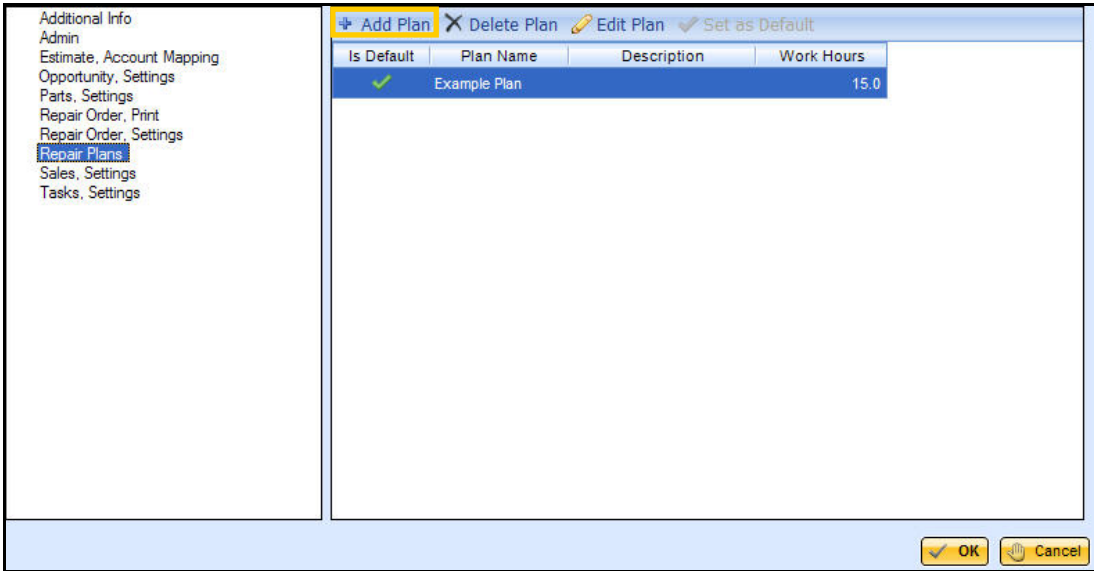
Step	Action
1	<p>Select whether you want repair orders to be numbered manually or automatically using the radio buttons. The default is Automatically.</p> 
2	If you choose Automatically, you must then specify the initial RO Number to use.
3	If this is the only category you want to customize or you are finished making changes, click the OK button on the Locations Settings to save your changes. If not, go to the next category.

# Customizing Location Settings: Repair Plans

**Introduction** This job aid describes the Repair Plan category.

**Repair Plans** Use Repair Plans to set up Repair Plan templates that include default repair phases. The duration of Repair Plan phases may be fixed or calculated based on an adjustable percent of Repair Order hours per Labor Type.

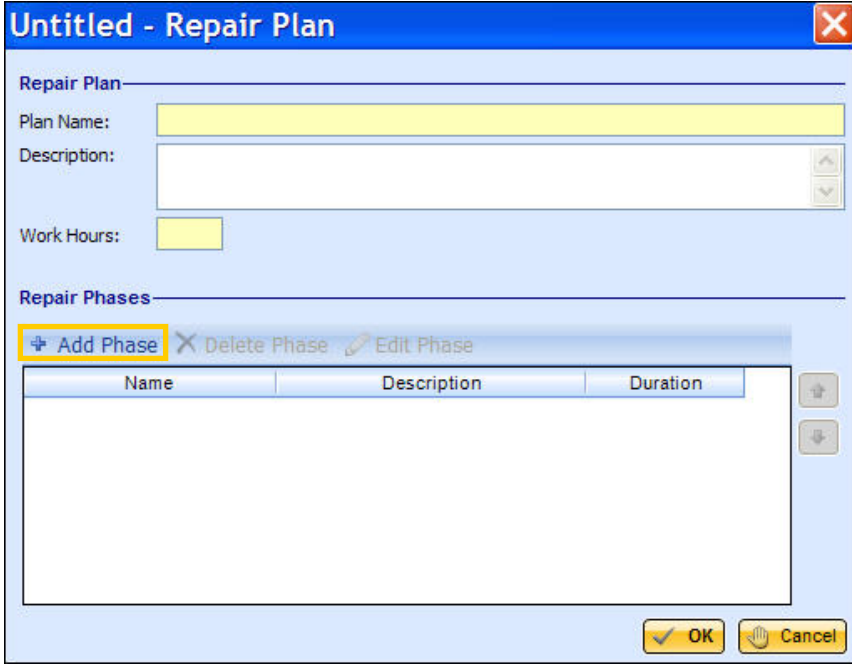
This table shows you how to set up Repair Plans and set up the default Repair Plan to use:

Step	Action
1	<p>Click the Add Plan link to create a new Repair Plan.</p>  <p>The following information can be added to the Plan:</p> <ul style="list-style-type: none"> <li>• <b>Is Default:</b> The first Repair Plan added automatically becomes the default.</li> <li>• <b>Plan Name</b></li> <li>• <b>Description</b></li> <li>• <b>Work Hours</b></li> </ul>

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## Customizing Location Settings: Repair Plans, Continued

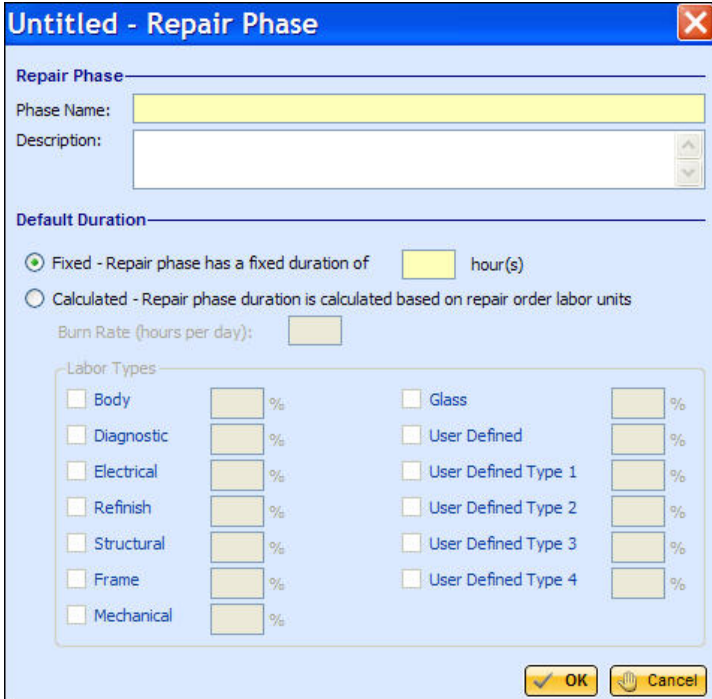
### Repair Plans (continued)

Step	Action
2	<p>The Repair Plan window opens for you to enter the required information.</p>  <p>The following fields can be customized by entering information in a text box:</p> <ul style="list-style-type: none"> <li>• <b>Plan Name</b></li> <li>• <b>Description</b></li> <li>• <b>Work Hours</b></li> </ul> <p><b>Note:</b> Required fields are denoted by a yellow background.</p>
3	<p>If needed, you can add Repair Phases to the Plan otherwise the, click OK to add the Repair Plan and return to Locations Settings, Repair Plans.</p>

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## Customizing Location Settings: Repair Plans, Continued

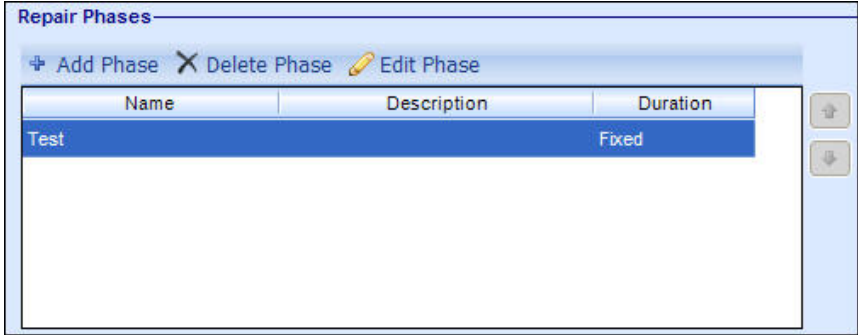
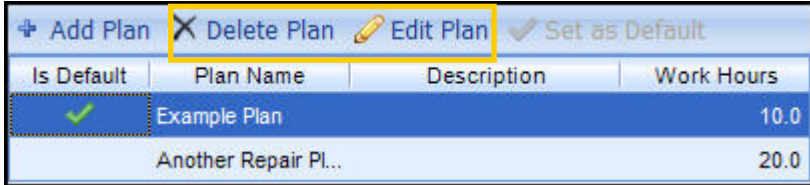
### Repair Plans (continued)

Step	Action
4	<p>To add Repair Phases to the Repair Plan, click the Add Phase link. The Repair Phases window opens.</p>  <p>The following sections must be completed:</p> <ul style="list-style-type: none"> <li>• <b>Repair Phase</b></li> <li>• <b>Default Duration:</b> Choose either Fixed in which case you must select the number of Hours or Calculated. If you choose Calculated, you must specify the Burn Rate and the Labor Types with percentages for the allotted hours.</li> </ul> <p><b>Note:</b> Required fields are denoted by a yellow background.</p>
5	<p>Enter the Repair Phase Name.</p> <p><b>Important!</b> This must be a unique name per Repair Plan. In other words, a single Repair Plan cannot have two Repair Phases with the same name.</p>
6	<p>Select Fixed and enter the number of Hours for the Repair Phase OR select Calculated and specify the Burn Rate and Labor Types included in the Repair Phase.</p>

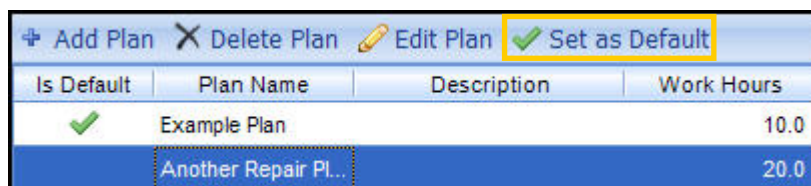
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## Customizing Location Settings: Repair Plans, Continued

### Repair Plans (continued)

Step	Action
7	<p>Click OK to return to the Repair Plan window. The Repair Phase is added to the Repair Plan.</p>  <p>Add, Delete, or Edit Phases as needed to the Repair Plan. You can also use the arrow buttons to change the order of the repair phases within the Repair Plan.</p>
8	<p>When finished adding Phases or details to the Repair Plan, click the OK button in the Repair Plan window to return to the Location Settings, Repair Plan window.</p> 
7	<p>If this is the only category you want to customize or you are finished making changes, click the OK button to save your changes. If not, go to the next category.</p>

**Note:** Use Delete Plan to remove a Repair Plan. Use Edit Plan to make changes to an existing Repair Plan.



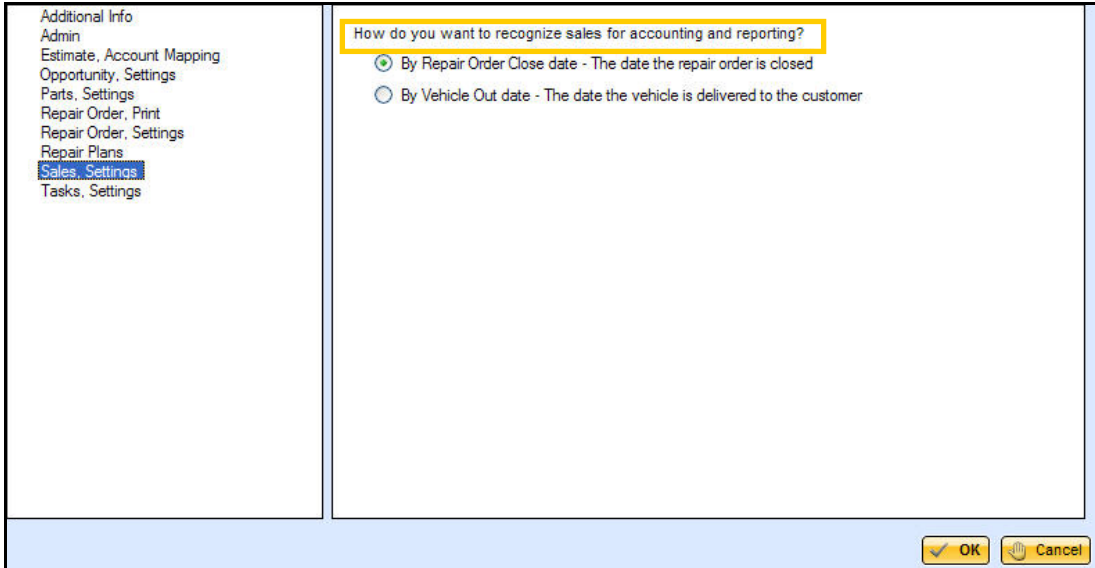
To select a Repair Plan as the default used when working in the system, highlight the desired Repair Plan and click the Set as Default button.



# Customizing Location Settings: Sales, Settings

**Introduction** This job aid describes the Sales Settings category.

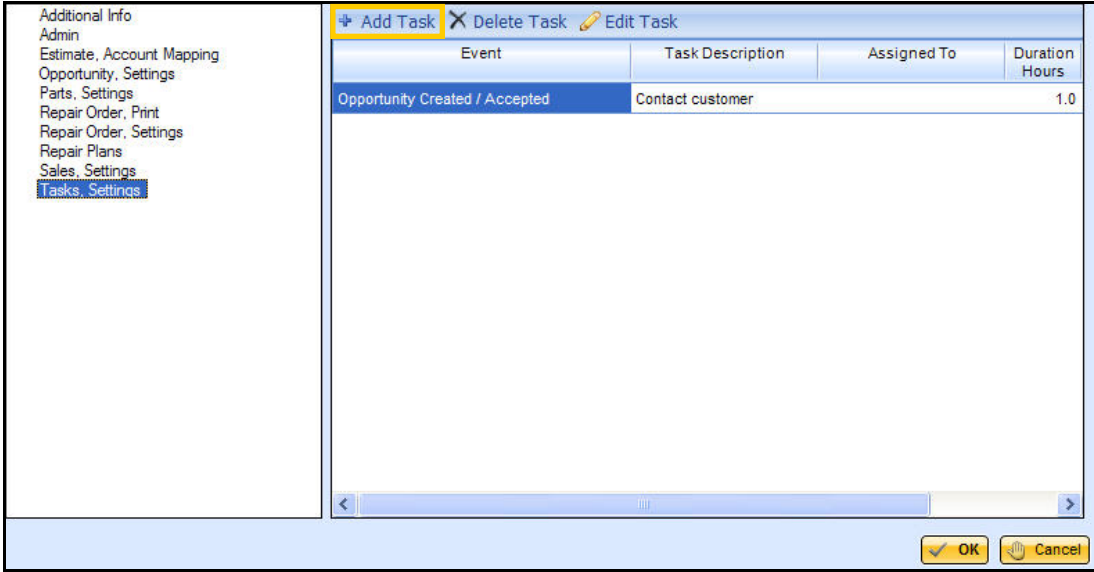
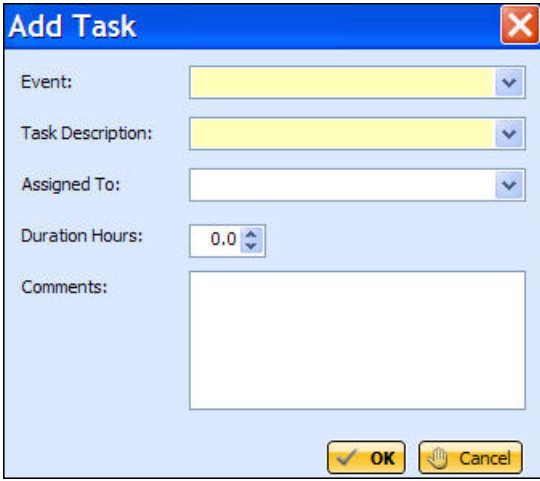
**Sales, Settings** Use the Sales Settings category to determine how to recognize sales for accounting and reporting purposes. This table shows you the options:

Step	Action
1	<p>Select whether you want to recognize sales by Repair Order Close date or by Vehicle Out date. The default is by Repair Order Close date.</p> 
2	<p>If this is the only category you want to customize or you are finished making changes, click the OK button on the Locations Settings to save your changes. If not, go to the next category.</p>

# Customizing Location Settings: Tasks, Settings

**Introduction** This job aid describes the Tasks, Settings category.

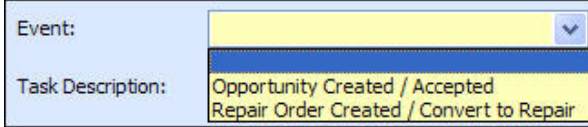
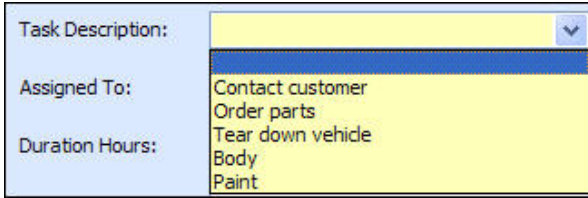
**Tasks, Settings** Use Tasks, Settings to add default Tasks to Opportunities and Repair Orders. These tasks will then appear automatically as needed when specific events occur. This table shows you how to add and edit Tasks:

Step	Action
1	<p>Click the Add Task link to create a new Task.</p>  <p>The screenshot shows a navigation menu on the left with 'Tasks, Settings' selected. The main area displays a table with columns: Event, Task Description, Assigned To, and Duration Hours. A row is visible with 'Opportunity Created / Accepted' as the event and 'Contact customer' as the task description, with a duration of 1.0. Above the table are buttons for 'Add Task', 'Delete Task', and 'Edit Task'. At the bottom right are 'OK' and 'Cancel' buttons.</p>
2	<p>The Add Task window opens for you to enter required information for the Task.</p>  <p>The screenshot shows the 'Add Task' dialog box. It contains the following fields: 'Event' (dropdown menu), 'Task Description' (dropdown menu), 'Assigned To' (dropdown menu), 'Duration Hours' (spin box set to 0.0), and 'Comments' (text area). 'OK' and 'Cancel' buttons are at the bottom.</p>

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## Customizing Location Settings: Tasks, Settings, Continued

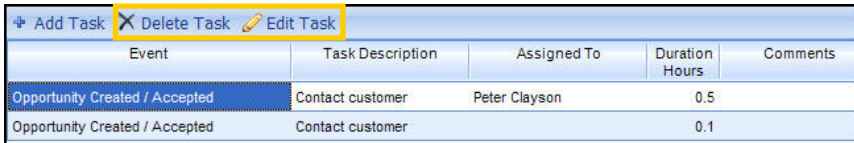
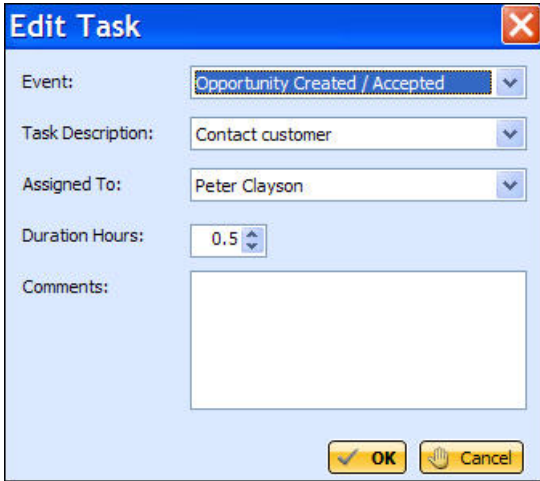
### Tasks, Settings (continued)

Step	Action
	<p>The following fields can be customized by selecting from drop down menus and entering information in a text box:</p> <ul style="list-style-type: none"> <li>• <b>Event:</b> Auto-generated tasks must be associated with an Event. Currently the only events supported include Create Opportunity and Create Repair Order.</li> <li>• <b>Task Description</b></li> <li>• <b>Assigned To:</b> You can associate a default Employee to the Task.</li> <li>• <b>Duration Hours:</b> Specify a default for how long the Task should take.</li> <li>• <b>Comments</b></li> </ul> <p><b>Note:</b> Required fields are denoted by a yellow background.</p>
3	<p>Select appropriate Event types that should include this Task. Options include:</p> <ul style="list-style-type: none"> <li>• Opportunity Created/Accepted</li> <li>• Repair Order Created/Convert to Repair</li> </ul> 
4	<p>Select appropriate Task Description that should include this Task.</p> 
5	<p>Select an Employee to Assign the task to as a default.</p>

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## Customizing Location Settings: Tasks, Settings, Continued

### Tasks, Settings (continued)

Step	Action
6	Identify the default Duration Hours of the Task.
7	Enter Comments if needed.
8	Click the OK button to Add the Task and return to the Tasks, Settings window. 
9	Add, Delete or Edit Tasks as needed. To Delete or Edit a Task, highlight it and click the Delete or Edit Task links. 
10	If this is the only category you want to customize or you are finished making changes, click the OK button on the Locations Settings to save your changes. If not, go to the next category.