

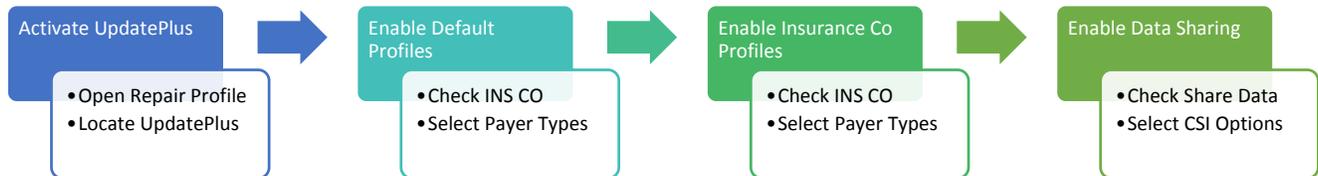
Job Aid: Enable & Setup CCC ONE® UpdatePlus

Introduction

This document shows you how to properly enable and set up CCC ONE® UpdatePlus inside CCC ONE to provide real time status updates to your customers via email or SMS text messaging (Repair Status).

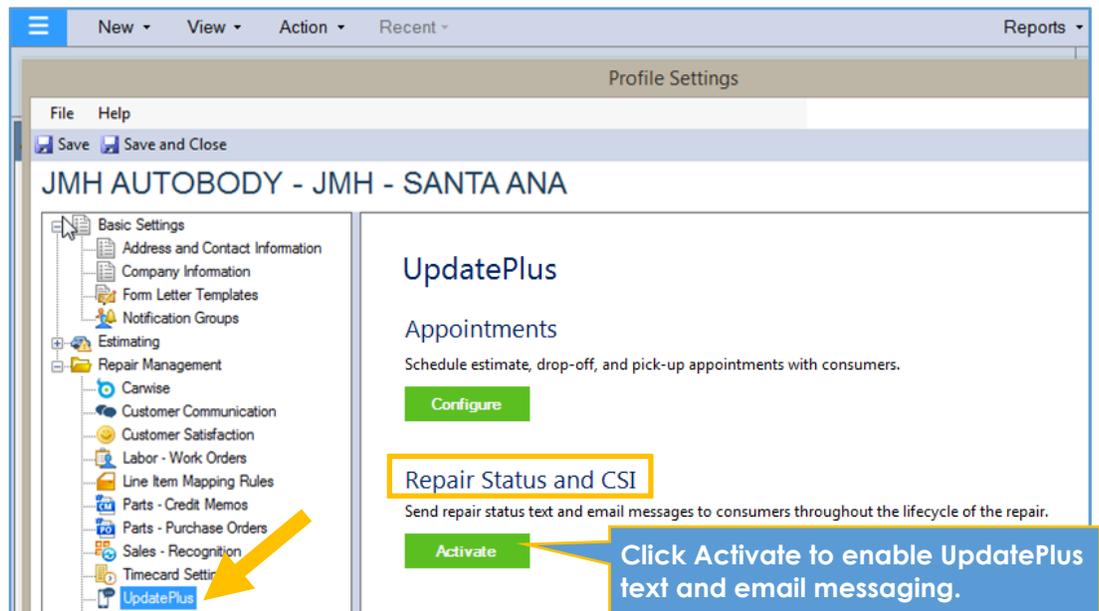
It also provides the steps for setting up Data Sharing (CSI) with specific Insurance Companies for CSI Surveys and how to set up the same sharing for your customers on Carwise. Finally, we will show you how to enable Appointments.

There are several basic steps for the Repair Status and CSI setup:



Enable UpdatePlus

Go to your Repair Facility Profile Settings (Configure, Profiles), locate **UpdatePlus** under **Repair Management** and click on it.



Clicking **Activate** allows communication to flow between CCC ONE and your customers. The UpdatePlus Setup window opens for you to complete setup.

Continued on next page

Job Aid: Enable & Setup CCC ONE® UpdatePlus, Continued

Default Profiles Setup

Once you have activated UpdatePlus, the first step is to make your selections for the two Default Profiles that are automatically displayed. These default settings apply to all workfiles unless superseded by a specific Insurance Company profile. They are:

[Default setting for all workfiles]: The settings in this row are the base settings for ALL workfiles unless there are Insurance Company specified settings.

[No insurance company specified]: The settings in this row are for workfiles where NO Insurance Company is identified.

Check Insurance Company for BOTH Default Profiles.

Select Insurance Company

Check the **Insurance Company** checkbox for both Default Profiles in order to enable UpdatePlus for all of your customers.

This allows them to receive text/email status messages.

Select Payer Types

The next step is to select **Payer Types** for your Default Profiles.

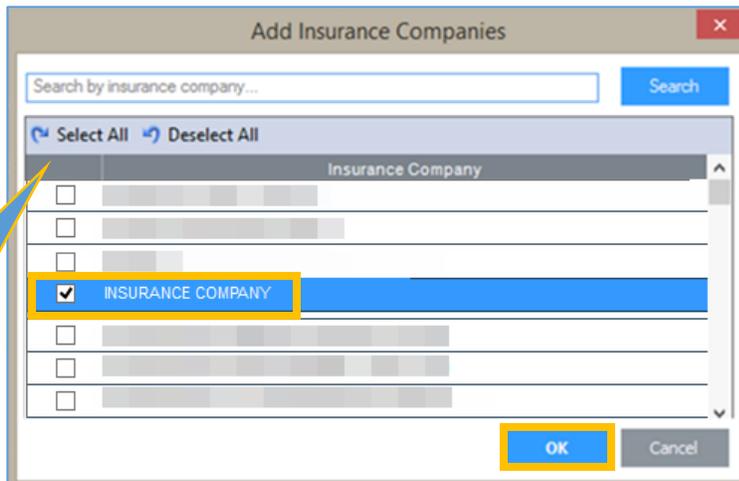
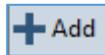
We recommend selecting **Self Pay** and **Not Specified** for your Default Profiles.

Continued on next page

Job Aid: Enable & Setup CCC ONE® UpdatePlus, Continued

Add Insurance Company Profiles

Now you can add specific Insurance Company Profiles and set up their Payer Types. To do this click the **Add** button.



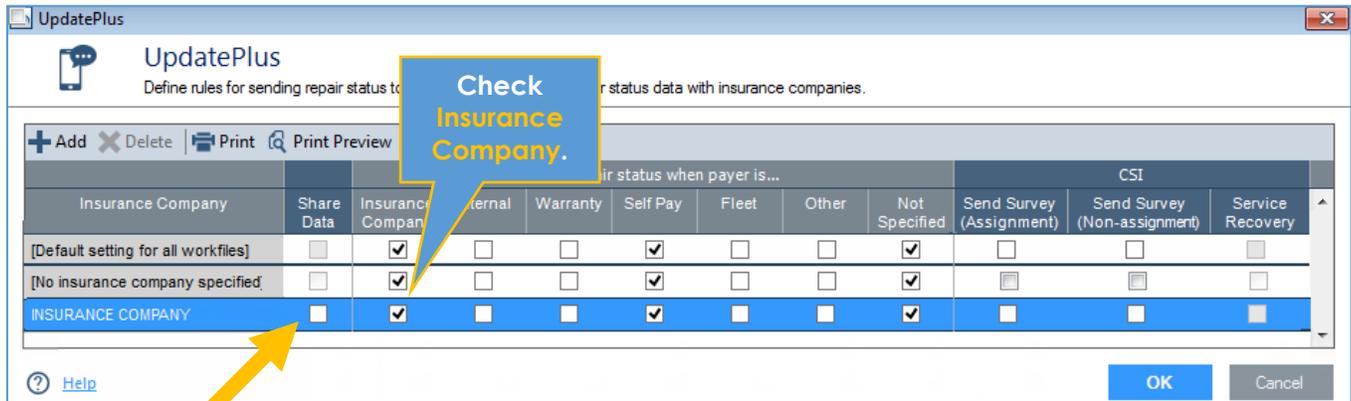
You can select multiple Insurers to add and enable.

The **Add Insurance Companies** screen displays.

Scroll or **Search** for the Insurance Company.

Check the **Insurance Company's** entry and click **OK**.

The Insurance Company is added. Now make your Insurance Company and Payer selections as needed.



Now that we know how to add Profiles and set them up for customer messaging, it is time to turn our attention to Data Sharing.

Enable Data Sharing

Checking the **Share Data** box for an Insurance Company allows Insurers to view the status messages sent by your Shop, responses from customers and the results from the Multiple question CSI Survey.

Insurance Company	Share Data
[Default setting for all workfiles]	<input type="checkbox"/>
[No insurance company specified]	<input type="checkbox"/>
INSURANCE COMPANY	<input checked="" type="checkbox"/>

Important! Data Share applies at the Repairer Level. You must have access to MSO Settings if you have multiple Locations. All Locations will be enabled.

Continued on next page

Job Aid: Enable & Setup CCC ONE® UpdatePlus, Continued

Enable Data Sharing, continued

Enabling Share Data prompts for **an End User License Agreement pop-up:**

- Read the terms.
- After acknowledging and agreeing to terms check the box.

Click **OK** to continue setting up the Insurance Company Profile.

Add CSI Options

The last step is to select the **CSI options** required for this Insurance Company Profile. *Based on the Insurer's implementation, these options may already be enabled and cannot be changed.*

If not, then select the **Send Survey** and **Service Recovery** options listed under the CSI section as shown here **unless already enabled.**

Insurance Company	Share Data	Insurance Company	Internal	Warranty	Self Pay	Fleet	Other	Not Specified	Send Survey (Assignment)	Send Survey (Non-assignment)	Service Recovery
[Default setting for all workfiles]	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[No insurance company specified]	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
INSURANCE COMPANY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Once you have made all of your selections for an Insurance Company Profile, then click **OK**.

The UpdatePlus settings you have enabled are now active. To edit Settings, click **Configure** and repeat the process.

Now let's see how to set up UpdatePlus Web View for your customers on Carwise.

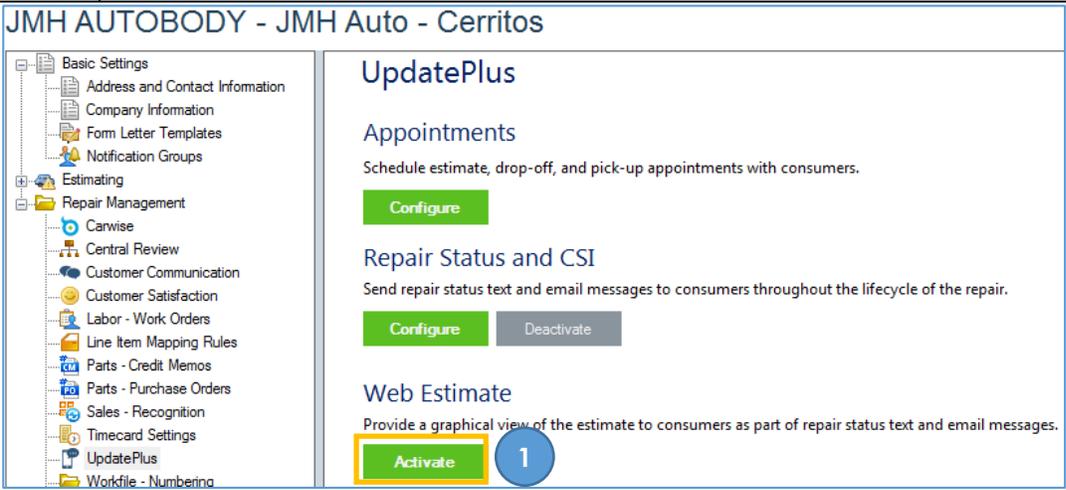
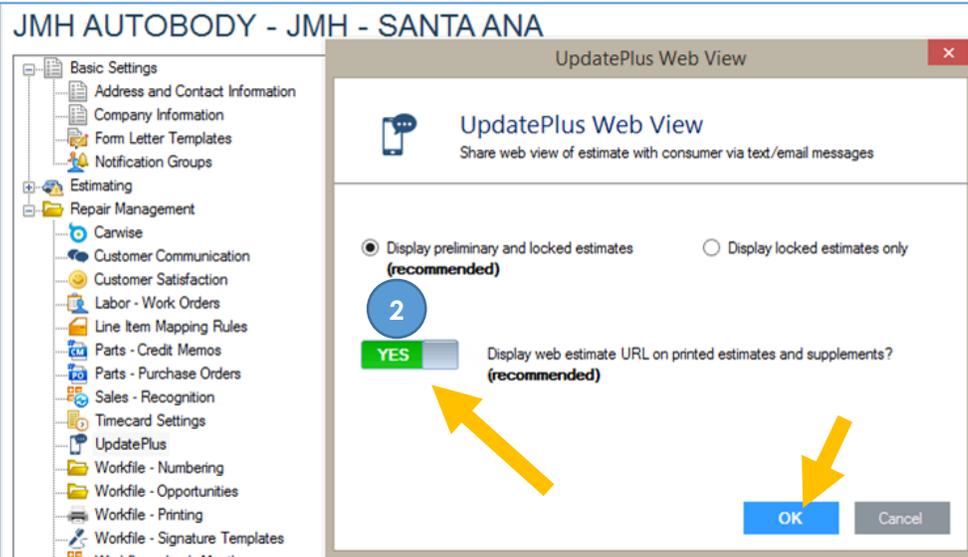
Continued on next page

Job Aid: Enable & Setup CCC ONE® UpdatePlus, Continued

Enable UpdatePlus Web View

Web View allows you to share repair data with your customers in real time using Carwise.

To enable Consumer View access to the estimate, perform the following steps:

Step	Action
1	<p>Click the Activate button under UpdatePlus Web View.</p> 
2	<p>The UpdatePlus Web View pop-up appears.</p> <p>To enable using the recommended settings, click OK.</p> <p>Otherwise, adjust settings as needed then click OK.</p> 

Continued on next page

Job Aid: Enable & Setup CCC ONE® UpdatePlus, Continued

Enable UpdatePlus Appointments

Appointments allows you to define durations for Estimate and Drop-off Appointments. If you have Appointments enabled in addition to Repair Status and CSI, you will also be able to send Appointment Reminders via text or email just like Repair Status messages. To enable Appointments, perform the following steps:

Step	Action
1	Click the Configure button under Appointments.
2	The Appointment pop-up appears.
<p>Select the Duration for Estimate Appointments and for Drop-off Appointments for Vehicle IN Events or Milestones.</p>	
3	If available, specify if you want to automatically send confirmation messages or to leave it defaulted to "Never".
4	Click OK .