FAQ: CCC ONE® Payments

Setup

Q. Who do I call for help?

A. Call CCC Technical Support at 800-637-8511.

Q. How do I contact Clearent?

A. Contact Clearent Customer Support in one of the following ways:

- 855-214-5817 Press 1 for Support. Press 2 for Sales.
- customersupport@clearent.com

Q. Who can configure payment devices for my Shop?

A. Any CCC ONE® Repair Workflow user with the Security permission "Profiles – Edit repair facility profiles" can configure payment devices for your Shop.

Q. How do I setup and configure my payment device?

A. Use the following steps to configure a payment device:

1. Log into cccone.com
2. Open the Settings screen
3. Click or tap on the Payment Devices tile
4. Click or tap on the Add (+) button
5. Enter a unique name for the device along with the device's API key
   a. **Where can I find my API key?** Clearent will email the key when they ship the device to you.
6. Click or tap Register

Q. When can I start processing credit card payments?

A. At least one payment type must be configured on the payment device to process credit card payments. Use the following steps to configure a payment type:

1. On the same Payment Devices setup screen, click the Configure button at the top right of the Payment Types section
2. Select the Payment Types that you want to use for processing credit card payments
3. Click or tap OK

Q. Can I have more than one payment device configured for a single location?

A. Yes. You can configure as many payment devices as needed.

Q. How do I test that my payment device is working?

A. Use the following steps to initiate a health check on your payment device:

1. Log into cccone.com
2. Open the Settings screen
3. Click or tap on the Payment Devices tile
4. Select the payment device to test
5. Click or tap the Test Connection button

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Using Payments with CCC ONE® Repair Workflow

Q. How do I accept a credit card payment?

A. Follow these steps to accept a credit card payment within CCC ONE® Repair Workflow:

1. Create a Receipt as normal using CCC ONE® Repair Workflow
2. On the New Receipt for, select the appropriate payment type that has been configured for processing credit card payments (See Device Setup section above.)
3. If more than one payment device has been setup for your shop or location, select the device to be used for this transaction.
4. Follow instructions on the device to accept the payment (slide/insert/tap the credit card)
5. Once the payment is processed, system saves the Receipt as complete

Q. Who can create a Receipt?

A. Any CCC ONE® Repair Workflow user with the "Receipts – Create, search, and view receipts" permission can create payments and receipts in CCC ONE® Repair Workflow.

Q. What transaction types are supported by CCC ONE® Repair Workflow?

A. The system supports three types of transactions:

- **Sale:** When a credit card is charged
- **Void:** When a credit card sale is cancelled *on the same business day prior to the batch of transactions being closed*
- **Refund:** When a credit card sale is refunded *on a later date*

Q. Who can void a Receipt?

A. CCC ONE® Repair Workflow users with the following permissions can void a Receipt:

- "Receipts – Create, search, view receipts"
- "Receipts – Void receipts"

Q. Who can process refunds?

A. CCC ONE® Repair Workflow users with the following permissions can refund a Receipt:

- "Receipts – Create, search, view receipts"
- "Receipts – Void receipts"
- "Receipts – Refund receipts"

Q. Can a payment be processed directly on the payment device?

A. No. A payment cannot be processed on a device without the transaction being initiated from a point of sale system, that is, from CCC ONE® Repair Workflow.

Q. Are debit cards accepted?

A. Debit cards are accepted and are treated the same as a credit card from a system perspective. *Any differences in processing a debit card is handled directly by Clearent™.*

Q. Does CCC have a contact-free Payment option?

A. Repair workflow shops configuring payment devices with Clearent have a new, contactless payment choice for customers using UpdatePlus Web Estimate features. When Web Estimate features are enabled, repair status updates to the customer include a link to view repair details online.

Q. Can I process a Receipt in CCC ONE® Repair Workflow without Clearent?

A. Yes. Credit card receipt payments can be recorded and saved in CCC using existing processes.

Q. Can I use multiple credit cards or payment types for an RO?

A. **Best Practice:** If the customer received and cashed the insurance check, enter that amount in the "insurer prepaid" field so the full balance will show as due by the customer. Then enter the receipt from the customer.

Q. Customer wants to split across credit cards or use card and check. What do I do?

A. Enter the first payment and save. Then create a new payment with the different card or enter the check.

Q. What should I do if I forget I have multiple payments and need to combine the Insurer Pay and the Customer Pay as a combined payment for my customer?

A. You can always enter two separate credit card payments.

Q. Can I take a payment over the phone?

A. Yes. Once the transaction is initiated in CCC ONE and the terminal lights up, you can begin entering the card number into the payment terminal. Certain fees may apply for card not present transactions. Please consult your Merchant Fee Agreement.

Q: How do I search for historical transactions?

A. Transaction History can be found in the following three places:

- Credit Card Device History report in CCC ONE® (Reports > Find Report)
- Payment configuration history tab (cccone.com > settings > payment devices > history)
- Within the Clearent Virtual Terminal or Clearent™ reporting

Q. I entered the wrong amount when I entered the customer Receipt and nightly batch <u>has not been run</u>. What should I do?

A. Void the receipt in CCC ONE® and a void transaction will be sent to Clearent™ to void the payment. Create a new receipt in CCC ONE® with the proper amount.

Note: You will not see a notice in CCC ONE® that the void was communicated to Clearent™.

Q. I entered the wrong amount when I entered the customer Receipt and the nightly batch <u>has been run</u>. What should I do?

A. Void the receipt in CCC ONE® and a refund transaction will be sent to Clearent™ to refund the payment. Create a new receipt in CCC ONE with the proper amount.

Note: You will not see a notice in CCC ONE® that the void was communicated to Clearent™.

Q. How do I refund the customer's money?

A. It depends on whether it is a full Refund, or a Partial Refund as shown here:

- **Full Refund:** Void the original receipt in CCC ONE®. Create a negative adjustment in CCC ONE® Repair Workflow to remove the payment. Enter a positive adjustment if you wish to write off the remaining balance. **Important:** Skip the last step if the balance is already zero.

- **Partial Refund:** CCC ONE® does not support partial refunds. Complete a manual refund through Clearent™ Virtual Terminal. Create a negative adjustment in CCC ONE® Repair Workflow to remove the payment. Enter a positive adjustment if you wish to write off the remaining balance. **Important:** Skip the last step if the balance is already zero.

Accounting & Reporting

Q. What report types are available for this feature?

A. There are four reports available within the system that are related to credit card transactions using your Clearent™ payment device:

- Credit Card Device History
- Credit Card Transactions – Settled
- Credit Card Exceptions – Unreconciled: CCC ONE
- Credit Card Exceptions – Unreconciled: Clearent
- Receipt Report –to use this report, the following conditions apply:
    - CCC Estimating and Repair (excluded in IA and Comp Est)
    - Repair Order Management
    - Security permissions set to create a receipt: **Create**, **Search**, and **View** receipts.
    - External settings configured through Clearent. CCC ONE automatically applies these settings.

Q. How does using this feature impact my accounting interfaces?

A. There is no functional impact. Any Receipt will still export to your accounting software. The additional reports provided for this feature make it easier to reconcile the transactions.

Q. Can the receipts reflect shop surcharges?

A. Users with surcharge functionality enabled with Clearent may now receive a surcharge amount for both Estimates and Billing. The surcharge amount is applied to the receipt and includes a disclaimer advising the user of the surcharge applied.

Working with the Clearent™ Virtual Terminal (VT)

Q. What is the Clearent™ Virtual Terminal?

A. The Virtual Terminal is a website that can be used to connect to Clearent™ to process credit card payments. It is an alternative point of sale to CCC ONE® Repair Workflow.

Q. How do I access the Virtual Terminal?

A. The Virtual Terminal can be accessed at vt.clearent.net. Clearent™ is responsible for providing repair facilities with a login and password to the VT. If you cannot find this information, please contact Clearent™.

Q. Will transactions completed through the Virtual Terminal be reconciled with CCC?

A. Yes. These transactions are completed on the hardware you have registered with CCC ONE® Repair Workflow. The data that goes through them will be available in CCC reports.

Q. How can I process Sales in the event of a CCC outage?

A. Use the Clearent™ Virtual Terminal website to process payments in the event of a CCC outage.

Troubleshooting

Q. When would a payment process not launch from creating a Receipt?

A. The payment process must be initiated from a point of sale system. If it cannot be launched from a CCC Receipt, it must be initiated from the Virtual Terminal. This transaction will appear in the following reports:

- Credit Card Device History
- Credit Card Exceptions – Unreconciled: CCC ONE

Q. What happens if Clearent™ is down?

A. Credit card receipt payments can be recorded and saved in CCC using existing processes, however payments will not be processed by Clearent™ during an outage.

Q. What should I do if the customer's card chip cannot be read?

A. You can process the payment by swiping the card or manually inputting the card information. If you choose to manually enter the card information, certain fees may apply. Please consult your Merchant Fee Agreement.

Q. What should I do if I lose my connection to the payment device (terminal)?

A. The answer depends on *when* you lose the connection to the device. If you lose connection after....

- **Clicking Pay Now:** After the connection is reestablished, is the terminal still "awake?" If yes, proceed with swiping/inserting the card. If no, select *Pay Now* again.

- **Terminal is "awakened":** After the connection is reestablished, is the terminal still "awake?" If yes, proceed with swiping/inserting the card. If no, select *Pay Now* again.

- **After CCC confirmation is received:** Was the Receipt updated? If yes, then save and close. If not, then confirm through the terminal that the payment was processed. If it was processed, *manually update* the receipt with the authorization number. If it was not, select *Pay Now* and complete the process again.

Q. What happens if my customer stops payment on a credit card transaction?

A. Enter a negative adjustment against the RO to show the balance is still due.

Q. How do I enter a non-RO related payment?

A. Bypass the terminal, enter the transaction manually through Virtual Terminal.

Q. Can I use multiple credit cards or payment types for an RO?

A. Yes. Modify the amount due in the CCC ONE® receipt and process each receipt as a separate transaction.