

Using the Notes Tab

Introduction

This job aid discusses how to:

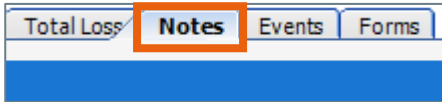
- Add Notes to Workfiles
- Add and View Updates to a Workfile or Document Activity and Communication

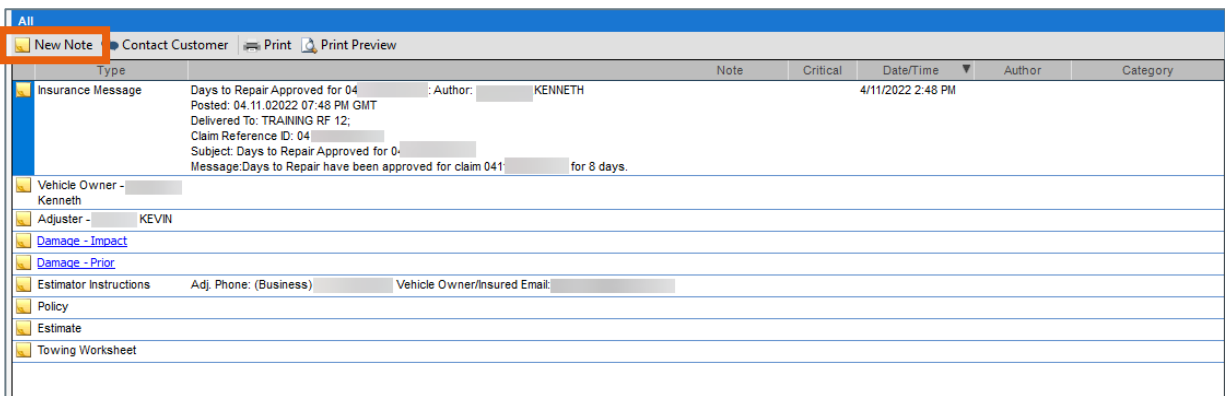
For more information on Customer Communication and the Notes feature, click the demo link below:

[Customer Communication and Notes](#)

Adding Notes

The **New Note** feature allows you to add notes and updates outside of customer calls. To add new notes, follow the steps below.

Step	Action
1	Open a workfile in CCC ONE® .
2	Click the Notes tab within the workfile. 
3	Select New Note , the New Note window opens.



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Using the Notes Tab, Continued

Adding Notes, continued

New Note

Category:

Type:

Note:

This is a critical note

Last three notes entered:

Critical	Date/Time	Author	Type	Note
	4/11/2022 2:48 PM		Insurance Message	Days to Repair Approved for

OK Cancel

All notes for this workfile can be viewed on the **Notes** tab, including customer communication notes. Other Notes appear here such as status for an adjuster, vendor, or other related calls. Estimators should be on the look-out for Central Review notes if your company uses that feature.

Note: The Contact Customer option is also available in the **Notes** tab.

Add and View Updates & Document Activity and Communication

Use the **Notes** tab to add or view updates to the workfile outside of communicating with the customer. Use **New Notes** to document activity or communications in the workfile with the steps below:

Step	Action
1	<p>Within a New Note, select a Category from the drop-down list.</p>

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Using the Notes Tab, Continued

Add and View Updates & Document Activity and Communication, continued

Step	Action
2	Select a note Type from the drop-down list. Note: The list varies based on the Category selected.
3	Enter a Note . Select the check box if it is a critical note. <div data-bbox="581 548 1409 1024" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between;"> New Note × </div> <div style="margin-top: 10px;"> <p>Category: Status Update ▾</p> <p>Type: Delivery Date Change ▾</p> <p>Note: Delivery Date now 9/6.</p> <p><input checked="" type="checkbox"/> This is a critical note</p> </div> </div>
4	Click OK when finished.