CCC® Contact Center

CCC® Contact Center

Target Audience	Call Center Representative/User

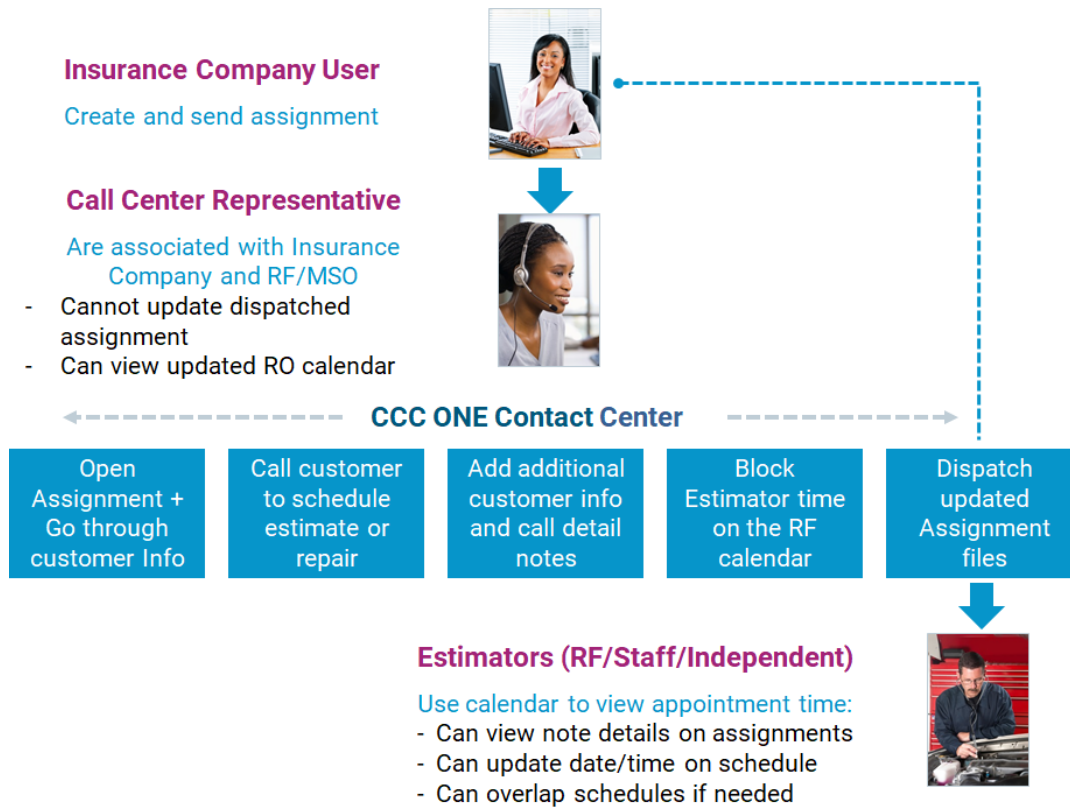|	
Introduction	CCC® Contact Center is a dispatching product that offers efficient and effective communications between the insurance company, customers, and repair facility (RF). It enables you to manage assignments consistently for large or small MSOs.
	This product is replacing the Autoverse Repair Management System (AVRM).
	It allows you to centrally manage and dispatch assignments from one viewing screen by:

- Enabling you to view all assignments sent by Insurance companies.
- Using received assignments for scheduling estimate or repair appointments.
- Allowing you to view Estimators' calendars associated with RFs/MSOs to schedule estimates or repair work.
- Offering quick communications to customers after an incident occurs.

CCC® Contact Center, Continued

How does Contact Center Work

The following graphic shows how CCC ONE Contact Center works:

Insurance Company User

Create and send assignment

Call Center Representative

Are associated with Insurance Company and RF/MSO
- Cannot update dispatched assignment
- Can view updated RO calendar

CCC ONE Contact Center

Open Assignment + Go through customer Info	Call customer to schedule estimate or repair	Add additional customer info and call detail notes	Block Estimator time on the RF calendar	Dispatch updated Assignment files

Estimators (RF/Staff/Independent)

Use calendar to view appointment time:
- Can view note details on assignments
- Can update date/time on schedule
- Can overlap schedules if needed

Accessing the Contact Center

You must have Contact Center license to see this feature within the CCC ONE RF version. To log into Contact Center, follow the steps below:
1. Log in to the CCC ONE RF version and select **View > Contact Center**.
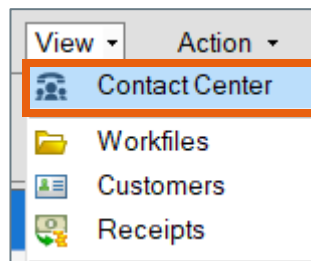
View ▾	Action ▾
👥 Contact Center	
📁 Workfiles	
📇 Customers	
📋 Receipts	

Accessing the Contact Center, continued

2. Select the assignment from the **Call Queue** list.

   You can also search for the specific assignment by the **Insurance Company/Claim Number/Owner Last Name/Owner Phone Number**.

NOTE: The Contact Center should have already been set up for the Repair Facility profile. Typically, someone in the Contact Center with Administrative roles will complete this setting. Please use the Contact Center-Configuration job aid for how to set it up.
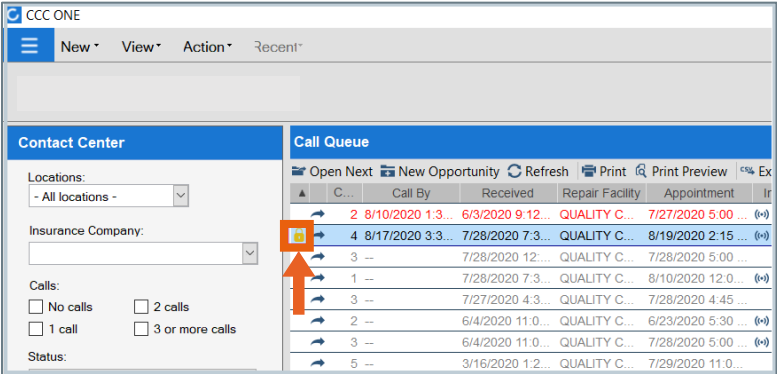
Call Queue View – Columns

The main screen of the Contact Center shows information for Assignments and Calls as columns, icons, and text with varying colors.

Continued on next page

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Call Queue View – Columns, continued

Column	Description
Lock	The first column is the Lock column which will display the lock icon if this assignment file is already open. This helps let other Call Center representatives know someone is already handling this assignment. This lock will automatically unlock after the pre-set time indicated in the configuration settings.
Status	This is the second column in the view to display icons to indicate the status of an assignment or call. We will cover this later.
Calls	Displays the number of calls you have made to the customer. Every phone interaction will be recorded as a call, and the number will represent those calls.
Call By	Displays the date and time within which you need to make a call to the customer. This column may have: ▪ Calls that are automatically scheduled when the assignment comes in. ▪ Calls that you have scheduled, for example, reminder calls.
Received	Shows the date/time assignment is received from the Insurance Company.

Continued on next page

Call Queue View – Columns, continued

Column	Description
Repair Facility	− Shows initial RF that the assignment is assigned to by the Insurance company or − The RF that was dispatched to if load leveled
Insurance Company	Shows the Insurance Company that sent the assignment. **NOTE:** You may see one of the following next to an Insurance company in this column: ▪ Radio button: indicates that this is a communicated assignment. ▪ Green Asterisk *: indicates that this is an Open shop assignment. (Contact Center also accepts Open Shop assignments.)
Claim Number	Claim number information as indicated in the assignment.
Owner	Vehicle Owner's name
Vehicle	Vehicle information
Drivable	Indicates whether the vehicle is marked drivable or non-drivable. You will see the Yes, No or Unknown indicator.

Call Queue View – Icons

Icons are displayed in the Status column. Icons indicate the status of calls and assignments.

Icon	Description
Dispatched icon →	The assignment from the Insurance Company has been dispatched to RF.
Reassignment icon (Arrow Pointing to the left) ←	Displays when re-assignment is requested: ▪ RF may have requested the assignment to be sent again. This is a manual action and is NOT done automatically by the system.

CCC® **Contact Center,** Continued

Call Queue View – Icons, continued

Icon	Description
Blank Status column	The assignment is open and still awaiting action: ■ The Call Center representative has not called the customer. ■ No dispatch has been made to the RF (this means RF has not seen the assignment). ■ Has not been marked as a lost customer. ■ The assignment has not been cancelled.
Lost Customer icon	Indicates that you are unable to sell repair to the customer - for example, if Call Center has called customer multiple times to sell repair work but has not heard back from the customer. The Call Center may indicate this as lost opportunity or Lost Customer. **NOTE:** You can still reopen the Lost Customer by clicking-right on the assignment file.
Assignment Cancelled icon	Displays when the Insurance Company has cancelled the assignment that was already sent. This scenario occurs when: ■ The customer has decided not to go through with repair for the vehicle ■ The assignment has been reassigned to a different RF. The original assignment is cancelled as it is reassigned.

CCC® Contact Center, Continued

Call Queue View – Colors

Colors indicate priority of calls to be made.

Color	Description
Red	Indicates overdue calls (means we did not satisfy that call by the specified date and time). ▪ These are high-priority files. ▪ Call should be made as quickly as possible. **Assignments with Red color always display on top of the list.**
Black	Indicates that it is on track and is due on that day. **These files display in the middle of the list.**
Gray	Indicates calls scheduled in the future other than current date. It may mean the following: ▪ Still on track and not overdue ▪ Calls have been satisfied and no further action needs to be taken. **These files display at the bottom of the list.**

Call Queue View – Modifying Column View

You can modify how the column displays in the Call Queue view. Follow these steps to modify the column view.

Column Width	Drag right or left to expand or shrink column.
Rearrange column	• Right-click on any column and uncheck to hide this column. • You can click **Reset Column** to return to default view. **NOTE**: You can still search for data in the hidden columns. Hiding columns may not be necessary–there are not that many columns in the Call Queue view.
Move columns left or right	Simply select and drag column left or right.
Sort Columns	Can sort based on criteria. The Call Queue view shows only 150 sorts per screen. **NOTE:** If you sort any columns in ascending or descending order, you need to reset the column heading to return to the default view where most urgent calls are scheduled based on date and time. To do so, right-click on the column, select **Reset** Column, and then click **Refresh**.

CCC® **Contact Center,** Continued

Call Queue View – Modifying Column View

As a Call Center user, you will need to manage an assignment sent from the insurance companies. You can take one of the following actions while managing an assignment:

Action	Description
View	Allows you to view the assignment file.
Schedule	Allows you to schedule calls, estimate, or repair appointments. You can also add notes to the assignment work file.
Dispatch	Allows you to dispatch the assignment to the specified RF. It will go to only the specified RF whether it is a single location or MSO location as indicated in the assignment.

Highlight the assignment and then select the action as necessary:

Viewing an Assignment

Click the **Schedule** on the mini tool bar on the assignment to access the calendar view and to schedule an assignment.

The calendar displays. There are three sections on this view:

Calendar View – Left Pane

Left pane displays information sent by Insurance Company. You can also add information about the customer here.
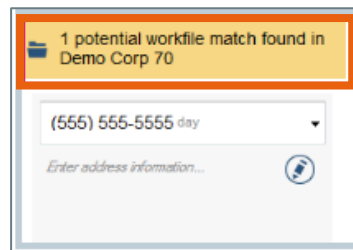
You will see the following:
- **Owner's name**
- **Phone numbers:** if there are multiple phone numbers, you will be able to select them from the drop-down list.
- **Address**
- **Vehicle information**
- **Insurance Company information**

Potential Workfile match notification: May display on top if there is a matching file in the system for this assignment. This may represent one of the following:
- Repeat customer for the Insurance Company.
- The assignment was created at RF. For example, the customer has come directly to the RF. RF wrote the Opportunity or Repair Order (RO) and this has come here as an assignment.

NOTE: If you receive this notification, make sure to go back to the Workfile screen and search for this file. Then educate yourself about the customer before calling.

CCC® Contact Center, Continued

Calendar View – Left Pane, continued

Pencil Icon: Click this icon to update and add additional contact information for the customer sent with the assignment.

For example:
- You can enter the email address for Update Plus users so customers can be informed via email.
- Or you can add additional phone numbers for contact. The phone numbers you have added will list in the phone number drop-down.

You need to **OK** to save the contact information you updated.

NOTE: The information you have added will transfer with the file.

Calendar View – Left Pane, continued

Assignment icon: Click on this icon to view the Assignment sheet. This contains information that is sent by the Insurance company. This information may include Loss information, assignment notes, instructions, rental car, etc. This is very similar to the assignment sheet that used to be sent via Fax or email.

NOTE: Go through this worksheet to educate yourself about the customer before calling your customer. You can print this information if needed by clicking **Print Preview**.

Calendar View – Left Pane

The right pane contains sections as below:

Event section: Indicates event occurring within the Contact Center application. Events are automatically created and cannot be modified. This event note will remain only within the Contact Center. An example of Event is an assignment received date and time.
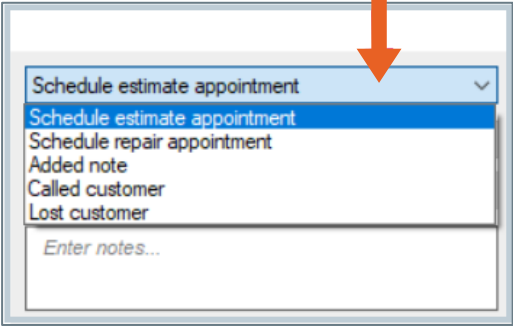
Notes section: Tracks all notes entered. These notes will flow over with the Assignment work file when dispatched. This means RF will be able to see all notes that are entered.

Drop-down list to select options as following:
- Schedule estimate appointment
- Schedule repair assignment
- Adding notes
- Adding notes associating customer call
- Marking a file as a Lost customer
- Requesting new assignment
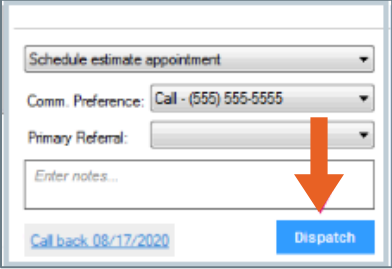
Calendar View – Left Pane, continued

Primary Referrals: You can enter the primary referral information. **NOTE:** You cannot update this information once you dispatch the assignment to the RF.

Text box to enter notes: You can enter notes about interactions with the customer. You can enter a note per each call.

Notes you enter will display as Call 1, Call 2 in the Notes section next to Event.

Call Back link: Click this link to schedule a reminder/follow up call for the upcoming/completed appointment if needed.

Typically, this call is placed 24 hours before or after the appointment. **Dispatch button:** To dispatch the file to RF. Estimators (RF users) will see appointments in their calendars.

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Calendar View – Middle View or Calendar section

You can use the calendar to schedule estimates or repair appointments.
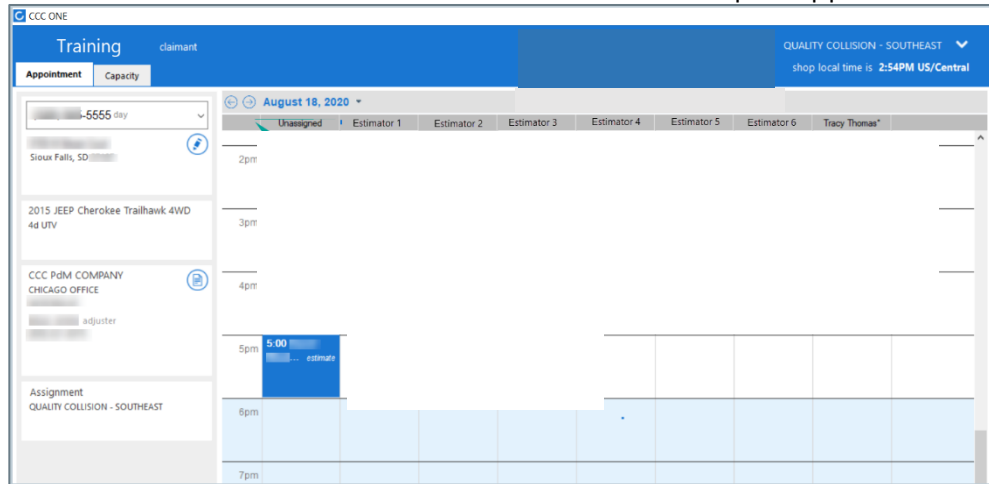
Following are items you need to focus on in the calendar:

Dates	The calendar view always defaults to the current date. To schedule for dates other than the current date, scroll the calendar forward.
RF	Shows the RF to whom you will dispatch the assignment. **NOTE:** If the Insurance company allows Load Leveling, you will see the drop-down list to select another RF location within this MSO. **Load Leveling** allows you to reassign an assignment to a different RF location irrespective of the original assigned RF. By load leveling, you will be able to control the volume of assignments that are sent to a specific RF location.

**Calendar
View – Middle
View or
Calendar
section**,
continued

Estimators list	The calendar default displays all Estimators/Appraisers (users with estimator role) at the selected RF location. **NOTE:** The estimators are already set up in the Workflow. Make sure that the estimator is sharing his/her/their calendar if you do not see the estimator in the calendar.
Dark Blue Box	The dark blue box automatically appears on the date and time that you open the assignment work file. Left click to move this box anywhere in the calendar under the specific estimator. **NOTE:** The size of this box may differ based on the type of appointment (Estimate or Repair) you selected. This time is defined in configuration.
Gray box	Indicates appointment schedule that is already in place. You cannot overlap two appointments by moving the blue box on top of the gray box. If you try to do so, it will give you an error message.

CCC® **Contact Center,** Continued

Scheduling an appointment

Follow the steps below to schedule an appointment:

1. Select the assignment on the Call Queue list and click Schedule on the mini tool bar.
   Remember: The priority assignment always appears in red on top of the list.
   Calendar view displays.
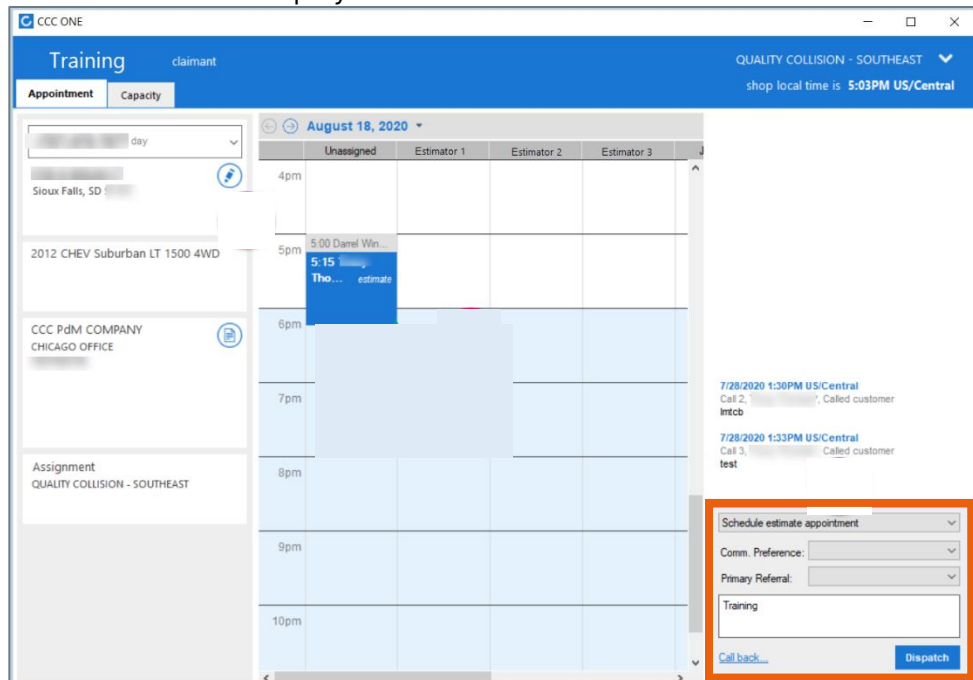
2. Click the assignment icon to open assignment worksheet to learn about the customer prior calling this customer.
   NOTE: If there is a duplicate file in the system for the customer, it will display **Potential workfile match** notification.
   If this occurs, make sure to review customer information before calling the customer.

3. Select the appointment type from the drop-down list based on the information you have gathered about the customer needs.
   ▪ For scheduling an estimate appointment, Select **Schedule estimate appointment**.
   ▪ For scheduling a repair appointment, **Select Schedule repair appointment**.

4. Call the customer.

Continued on next page

Scheduling an appointment, continued

5. Schedule the appointment by dragging the dark blue box on date/time as per the customer request.
   You can see appointments for all estimators for the assigned location.

   If the company allows **Load Leveling**, click on the drop-down list on the top right corner of the middle pane to select another RF location within this MSO to dispatch an assignment to.

   The calendar for the new location displays and you can view the schedule for all estimators at this location.

   Load leveling will not function properly if an assignment has been sent to a specific location and the estimate has been written.

   NOTE: You will receive the notification on the top left-hand corner if you try to schedule outside the time zone set for the RF.
6. Verify Communication Preference and Primary Referral if applicable.

Scheduling an appointment, continued

7. If the customer wants a reminder for the appointment, click the **Call Back** link, specify date/time for call back, and click **OK**.
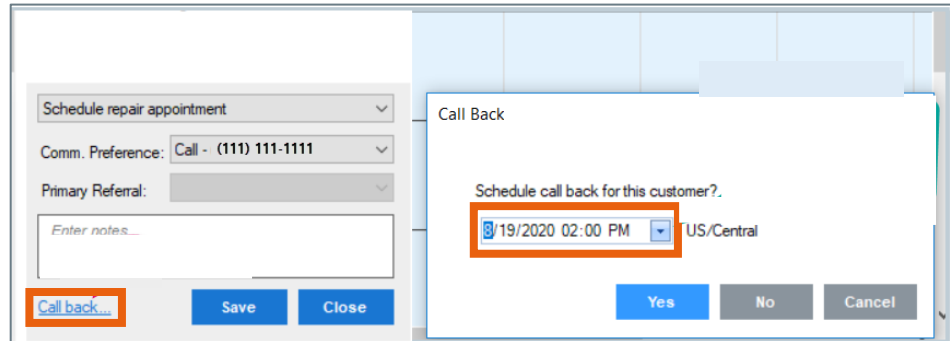
8. Write notes about this interaction in the Notes text box.
9. Click **Dispatch**.
   This assignment will now be sent to the specific RF location.

   NOTE: You can always make changes to an assignment by clicking schedule again. If you are updating the appointment date and time, simply modify and press **Save**.

   However, the scheduled time can be adjusted by the RF user in the RF side. You can view schedule time updates made in the calendar by a RF user.

Scheduling an appointment, continued

10. The dispatched assignment displays in the **Call Queue** list. This shows:
   ▪ Dispatched icon indicating that it has been dispatched.
   ▪ The Calls column shows the number of times the customer was called.
   ▪ Shows date/time for follow-up call you need to make.

If you have opted for Load Level, the **Repair Facility** column will display the new location you have specified.

If you open this schedule, you can see notes and other information you have added.

Continued on next page

CCC® **Contact Center,** Continued

Confirming Call Backs

All appointments requiring a call back display as scheduled calls in the Call Queue list.

1. In the Call Queue list, select the scheduled file for a call back and click **Schedule**.
   NOTE: This file appeared in the schedule list because you have indicated a call back when scheduling this customer. It shows how many times you have called the customer.

2. The calendar view displays. Call the customer to remind the customer about the appointment.

3. Select **Called Customer** from the drop-down list to indicate that you called the customer and enter notes for call detail.
4. Select one of the checkboxes as needed:
   1) **Call Back not required option:** if you do not need to call the customer and can complete this assignment.
   2) **Call Back option:** to schedule another call back.
5. In the text field, enter notes and click **OK**.

Confirming Call Backs, continued

6. This assignment again displays in the Call Queue list.
   1) Note there is no date/time scheduled for the call once the call has been satisfied.
   2) The Dispatched icon indicates that this schedule has already been dispatched to the RF.

Manual Opportunities

Contact Center can currently accept assignments from Insurance Company and Open shop assignments. This feature will allow them to manually create an assignment from third-party vendors (Mitchell, ADP) and walk-in customers.

Follow the steps below to see how you can create manual opportunities and keep track of them in CCC ONE.

1. On the viewing screen (main screen) for Contact Center, click **New opportunity**.
2. In the **New Opportunity** window that appears, the information you need to enter or select are highlighted in yellow.

3. Select the Contact Type and enter the following information for the selected contact type:
   - **Company:** Enter this information as needed.
   - **First Name and Last Name:** These are required fields.
   - Enter **Email and address (**s) if available.
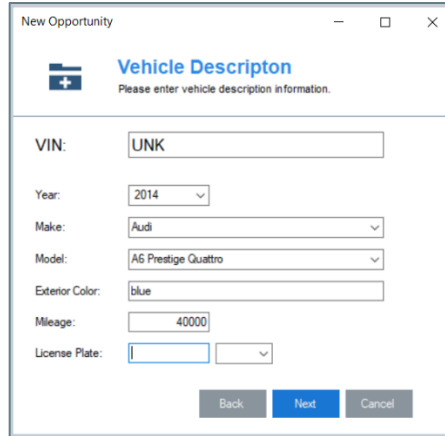   - **Phone Number:** At least one phone number is required.

Manual Opportunities, continued

Click **Next**.

4. Enter vehicle information in the **Vehicle Description** window and click **Next**.

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Manual Opportunities, continued

5. The Insurance Information window displays. Enter information in the fields as needed and click **Finish** to complete.

Insurance Company	• Select a specific insurance company if this is a third-party vendor. • Select **Customer Pay** if this is a walk-in customer.
Claim Office	Enter this information if claim office associated with the selected insurance company.
Claim number	Enter if available
Loss Date/Time	Enter if available
Deductible	Enter if available
Repair Facility	Select the required RF from the list.
Allow dispatch to the location	You have two options: **Yes** or **No**.

First, let's look at selecting **Yes** to dispatch this manual opportunity to the selected RF location.

CCC® Contact Center, Continued

Manual Opportunities, continued

6. Since you have selected Yes to dispatch, the calendar view displays.
   NOTE: You can now schedule this manual opportunity, write notes, and dispatch as you would for any other assignments as explained in the previous topic.

7. The dispatched manual opportunity file will appear as dispatched
   [icon] in the **Call Queue** view.
   You also have the option not to schedule and dispatch the manual opportunity file right away. If you choose to do so, this file still gets saved and appears in the Call Queue list. You can identify this file as shown below.

Continued on next page

Manual Opportunities, continued

NOTE: You can schedule, dispatch, and view this manual opportunity assignment as needed.

8. If you have selected **No to allow dispatch** in the Insurance Information window, this file will be saved and appear in the Call Queue list with a phone icon as shown below:
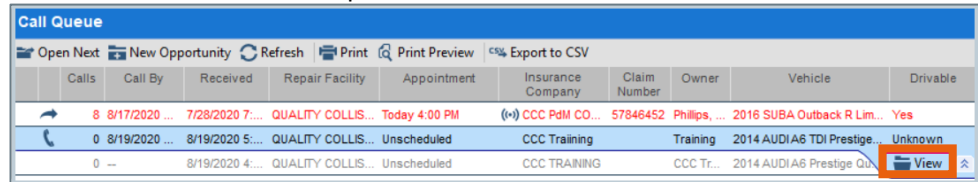
CCC® **Contact Center,** Continued

Manual Opportunities, continued

If you have selected No, you will no longer be able to dispatch or schedule this manual opportunity file and can only use it as a contact center record to follow up calls or add notes.

	Calls	Call By	Received	Repair Facility	Appointment	Insurance Company	Claim Number	Owner	Vehicle	Drivable
➡	8	8/17/2020 ...	7/28/2020 7:...	QUALITY COLLIS...	Today 4:00 PM	((•)) CCC PdM CO...	57846452	Phillips, ...	2016 SUBA Outback R Lim...	Yes
📞	0	8/19/2020 ...	8/19/2020 5:...	QUALITY COLLIS...	Unscheduled	CCC Traiining		Training	2014 AUDI A6 TDI Prestige...	Unknown
	0	--	8/19/2020 4:...	QUALITY COLLIS...	Unscheduled	CCC TRAINING		CCC Tr...	2014 AUDI A6 Prestige Qu...	View ⌃⌃

Call Queue
🖿 Open Next 📇 New Opportunity ⟳ Refresh 🖶 Print 🔍 Print Preview ᶜˢⁱ Export to CSV

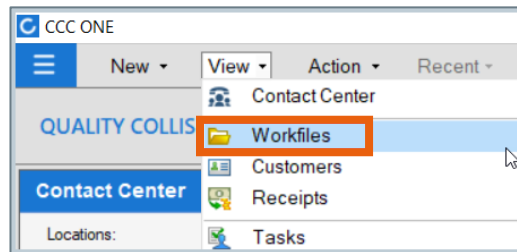**Managing Workfiles at the RF Location**

By using Workfiles, RF users can:

- **View assignments dispatched by CCC ONE – Contact Center:** This assignment contains all information from the original assignment (Insurance Company) and information added to this assignment during the scheduling process (Call Center).
- **Convert this assignment to Repair Order or other files** as necessary to manage in the RF location.

Follow the steps below to see how Workfiles are managed at the RF side:

1. From the main view screen, select **View > Workfiles**.

The Workfile window displays.

2. Select **New** in the **Open Opportunities** section to view dispatched assignments (new opportunities for RF).
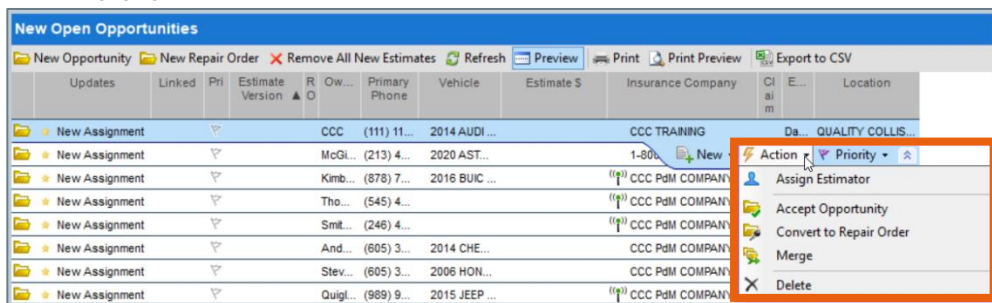
CCC® Contact Center, Continued

Managing Workfiles at the RF Location, continued

3. The list of new assignments displays.
Note: The assignment that you as a Call Center representative have just dispatched. This assignment contains:
- Name, address, phone information for the vehicle owner
- Notes entered about calls
- Assigned estimator
- **Primary referral information, if applicable**
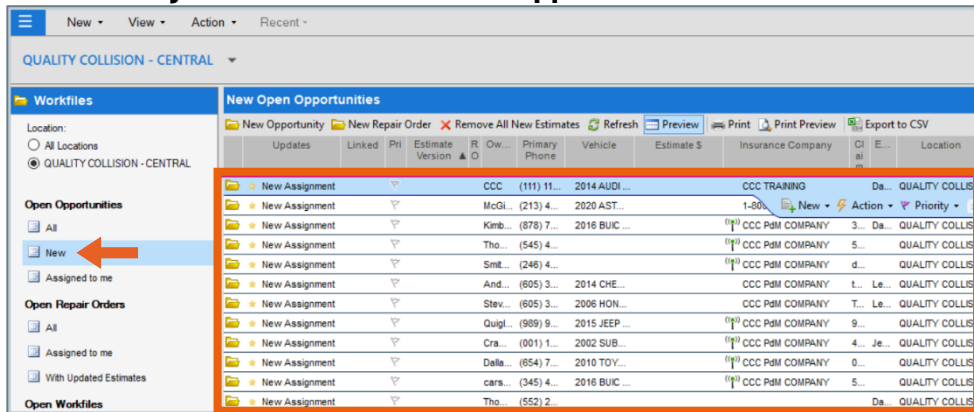
4. The RF user can take one of the following actions about the dispatched assignment:
- Assign Estimator if applicable
- Accept the opportunity
- Convert to the Repair order
- Merge
- Delete

Here, we have assumed that the RF user has chosen to convert this assignment to a repair order.
Select the **Convert to the Repair Order** option.
The new Repair Order window opens.

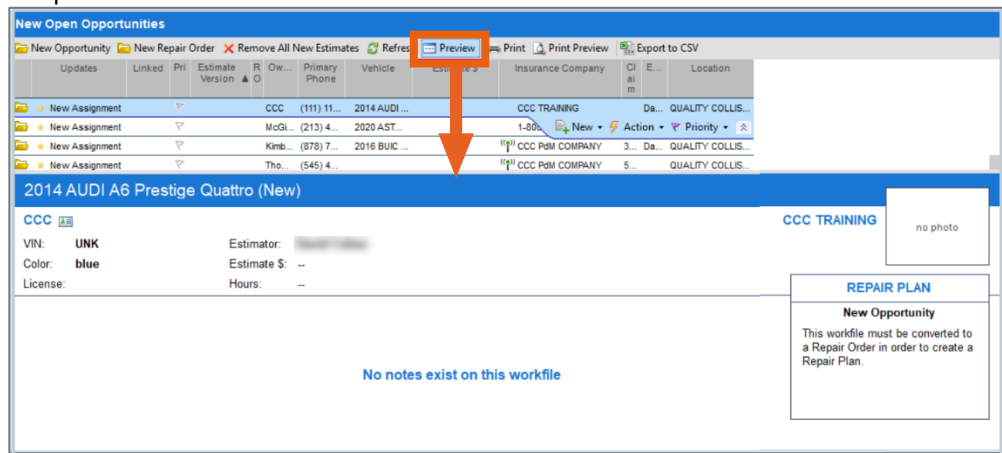**Managing Workfiles at the RF Location**, continued

RF users can view details for assignment in the Repair Order window that opens.

This user can view all notes related to this repair order. Remember, this used to be a dispatched assignment. This contains information about customers sent by the Insurance company and notes written by Call Center representatives.

5. Click the **Notes** tab, then select the Contact Center from the left pane to view notes written.
   You can also click the **Preview** tab to view general notes in a preview panel at the bottom of the window.

NOTE: If the call center adds a note after making a dispatch to the RF, this displays as **Estimate Update** and will show on a yellow banner.
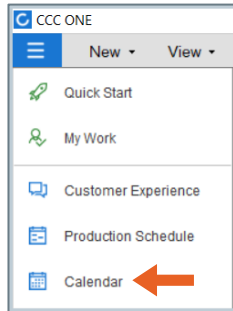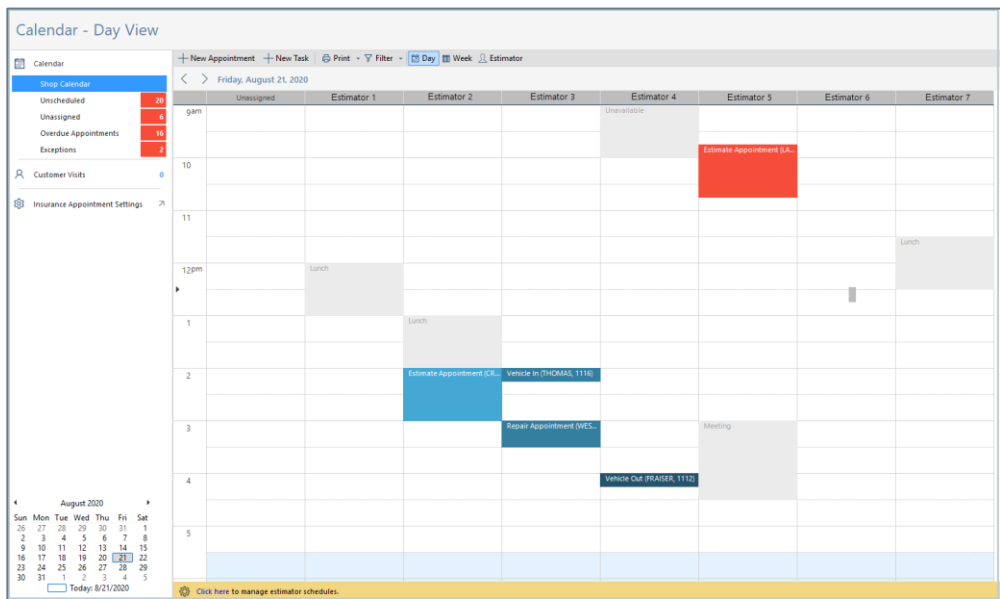
CCC® **Contact Center,** Continued

Managing Workfiles at the RF Location

You can view the calendar in the RF location side with all the appointments you have set up.

1. From CCC ONE, expand to click the **Calendar**.

2. The RF calendar displays the following:
   - All appointments in the calendar that the Call Center representative has set up.
   - Vehicle In and Vehicle Out information.
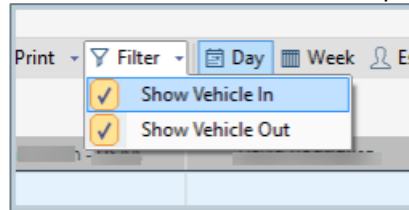   - Tasks that are overdue.

Managing Workfiles at the RF Location, continued

3. You can click **Show Vehicle In** and **Show Vehicle Out** buttons to filter Vehicle in and Vehicle out specific data from the calendar.

4. Hover over the Repair Order to view details.
   NOTE: RF users/Estimators can:
   - Adjust the time and date for these scheduled appointments. To do so, click **Edit** to adjust the date and time of the appointment.
   - These users also can overlap appointments. To do so, drag one box on top of the other.
   - Any updates made in the calendar in the RF side will be updated in the calendar so Contact Center representatives know the updates that are made.