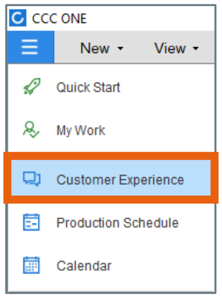
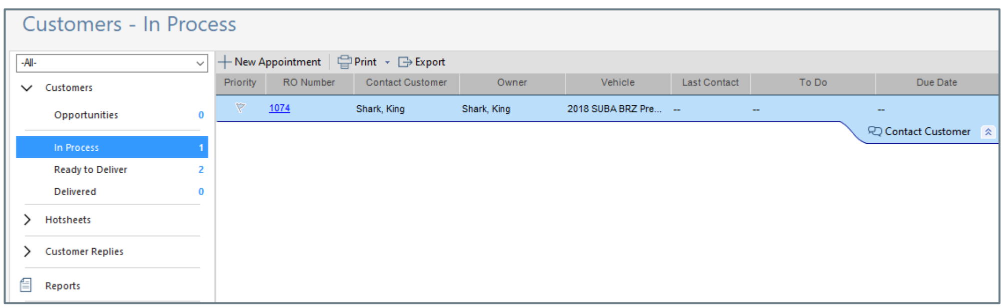
Customer Experience Dashboard Triggers & To-Dos

Introduction

The **Customer Experience Dashboard** allows both CCC ONE® Repair Workflow and Estimating users to manage their customer communications and status updates into sections.



Use the **drop arrows** to open a section, and then select a bucket to view its contents.



The Customer Experience Dashboard also provides a means of viewing the **To-Do** items for each workfile or repair order.

This job aid identifies the status triggers that move workfiles and repair orders from one section to another. It also describes the most common **To-Do** items that you will see.

New Workfiles and Accepted Assignments

Repair Workflow Users: The Opportunities section includes all Opportunities created within the last **7 days**.

- Cancelled Opportunities drop off the list.
- Opportunities drop off the list after 7 days.
- ROs where **Vehicle In Date** is NOT marked Complete stay in the Opportunities section.

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New Workfiles and Accepted Assignments, continued	**Estimating Only Users:** Opportunities include all Workfiles created within last the 7 days where **Vehicle In Date** is NOT marked Complete. • Closed and Deleted Workfiles drop off the list. • When **Vehicle In Date** is marked Complete, Workfiles drop off the list. • Workfiles will drop off the list after 7 days regardless of Vehicle In Date completion.
Workfiles: From Opportunities to In Process	**Repair Workflow Users:** Workfiles move to **In Process** when they are converted to a **Repair Order** AND **Vehicle In Date** is marked Complete. The **Repairs Completed Date** must **NOT** be marked complete. **ROs** will move out of In Process when: • RO is Cancelled • RO is marked a Total Loss • RO is Closed • Repairs Complete is marked Complete • Repairs Complete Date/Time Reminder is within Reminder setting **Note:** An RO marked as a Total Loss using **Action > Mark as Total Loss** in the Workfile will **NOT** display in the Customer Experience Dashboard. **Estimating Only Users:** Workfiles move to **In Process** when **Vehicle In Date** is marked Complete. The **Repairs Completed Date** must **NOT** be marked complete. Workfiles will move out of **In Process** when: • Workfile is Deleted • Workfile is Closed • Repairs Complete is marked Complete • Repairs Complete Date/Time Reminder is within the Reminder setting
Workfiles: From In Process to Deliver	Workfiles move to the **Ready to Deliver** bucket when the Repairs Complete Date is marked Complete OR the Repairs Complete Reminder is triggered. **Note:** Closed **ROs** may appear in **Ready to Deliver** if your shop is set up to close workfiles before delivery.

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Workfiles: From In Process to Deliver, continued

Repair Workflow Users:
ROs will move out of **Ready to Deliver** when:
- RO is Cancelled
- RO is marked as a Total Loss
- Vehicle Out date is marked Complete

Estimating Only Users:
Workfiles will move out of **Ready to Deliver** when:
- Workfile is Deleted
- Workfile is Closed
- Vehicle Out date is marked Complete

Workfiles: From Ready to Deliver to Delivered

Workfiles will move to **Delivered** when the **Vehicle Out Date** is marked Complete. Repair Orders remain in this sub section if the Vehicle Out Date is within the last **15 days**.

Workfiles drop out of Delivered when the Vehicle Out Date is more than 15 days ago.

Call Plan Triggers

Call Plans are used to generate **regularly scheduled reminders** to call the customer while the repair is in progress. Call Plans may be used in conjunction with UpdatePlus Status messaging.

For Call Plans to trigger properly, the following must be true:
- Milestone dates for Vehicle In and Repairs Complete must be scheduled (i.e., the date fields must be populated)
- Vehicle In Date must be marked Complete
- A call plan must be selected on the workfile

Note: Remember to use the **Refresh** button to update your Dashboard.

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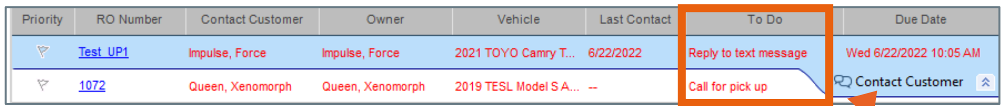
Working with To-Dos

As mentioned previously, a **To-Do** column is now available on the Customer Experience Dashboard.



Priority	RO Number	Contact Customer	Owner	Vehicle	Last Contact	To Do	Due Date
	Test_UP1	Impulse, Force	Impulse, Force	2021 TOYO Camry T...	6/22/2022	Reply to text message	Wed 6/22/2022 10:05 AM
	1072	Queen, Xenomorph	Queen, Xenomorph	2019 TESL Model S A...	--	Call for pick up	Contact Customer

To Do	Triggered By
Follow-up call	Checking the Follow-up required box in the Contact Customer window. Follow-up required by
Reply to email	Receiving an email from the Customer.
Reply to text message	Receiving a text message from the Customer.
Call for pickup	Repairs Completed is marked as complete
Notify repairs delayed	Changing the Vehicle Out Date
Status Update	Based on the Call Plan that has been chosen.
Sell Repair	Settings in Contact Center based on how long the workfile has remained an Opportunity.
(--)	There is no current To Do and/or there is no Call Plan chosen.

Key Points about To-Dos:

- They turn **red** when the user does not complete the **To-Do** by the deadline associated with it.
- They are **black** when the **To-Do** is due today.
- They are **grey** when there is no **To-Do,** or it is due in the future.
- The **To-Do** is cleared when the user completes the task specified by the **To-Do**.