Adding Customer Contact Information for Repair Status Updates

Follow the steps below to setup Customer Contact Information:

1 Let the customer know that your shop will be sending periodic repair status updates.

2 **In the Contacts tab,**

   a) Enter **customer name**.

   b) Find out how this **customer prefers to receive** repair status updates.

3 How to customer prefers to receive repair updated status

📱 **If Phone Call is preferred:**

- **Enter** preferred phone number.

- **Select** Call option in the Comm. Preference field.

- **Select** Call Plan.

✉ **If Email is preferred:**

- **Enter** Email address.

- **Select** Email option in the Comm. Preference field.

💬 **If Text is preferred:**

- **Enter** Cell Phone number.

- **Select** Text option in the Comm. Preference field.

NOTE: If you have selected Text as Comm. Preference you will see this message.

Select OK to indicate that your shop has received the customer's consent to send repair status updates and the CSI survey using text.
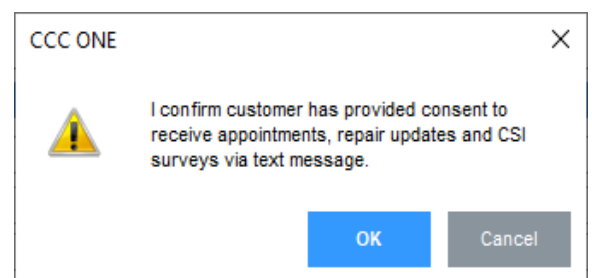
Entering Milestone Dates for Repair Status Updates

Data Entry Points

1	2	4	3	5
VEHICLE IN	**REPAIRS STARTED**	**REPAIRS COMPLETED**	**PROMISE DATE**	**VEHICLE OUT**
Enter at vehicle drop off and ensure correct time	Enter as soon as repair work begins	Enter when vehicle is ready for delivery	Enter when expected delivery date is known	Enter when vehicle is delivered and ensure correct time

Repair Status

Update Status

Complete each Status after entering Current final date/time

	Vehicle In	Repairs Started	Repairs Completed	Promise / Vehicle Out	Promise / Vehicle (
Current	06/25/2020 12:00 AM	06/25/2020 12:01 AM	/ / :		
Original	06/25/2020 12:00 AM	06/25/2020 12:01 AM		07/21/2020 12:00 AM	07/21/2020 12:00 AM

Last Status: **Vehicle In**; Next Status: **Repairs Started**

Update Status ▾
- Complete Next Status
- Undo Last Status

Message Triggers
after Milestone Dates are entered

| 1	2	4	3	5
VEHICLE IN	**REPAIRS STARTED**	**REPAIRS COMPLETED**	**PROMISE DATE**	**VEHICLE OUT**
OPT Out and Thank you messages sent	No messages sent	Vehicle is ready for pickup message sent	Repairs are underway message sent automated messages begin	• Post Delivery Thank you message sent • Single Question Survey (7 P.M. local time on deliver day) sent • CSI Survey (48 hours post

If you want the Insurance company to view your comments related to Milestone dates, select Autoverse Message event.

Customer Response

Customer responses to text or email will be delivered to estimator on workfile via email.

Be sure to respond promptly to customer questions or acknowledge receipt of question and provide timeframe for response.
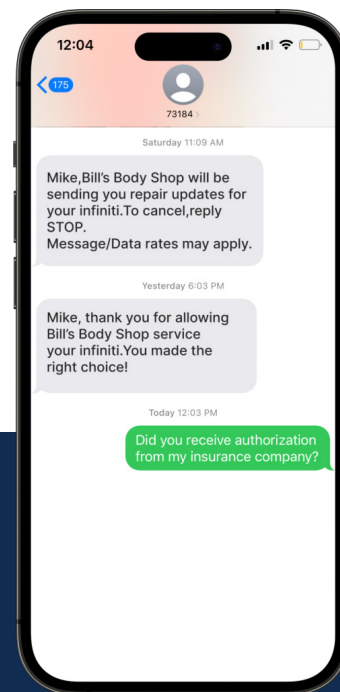
Alerts

Configure Alerts: In CCC ONE, expand the **Configure tab** to select **My Account.**

Alerts are delivered to the estimator via email when:

- No promise date has been entered 48 hours after Vehicle in date.

- When approaching Promise Date/Time with no completion date entered.

- Negative response on one or more CSI question(s).

- Take action on all alerts to keep your customer properly informed during the repair.