Adding Customer Contact Information for Repair Status Updates

Follow the steps below to setup Customer Contact Information:



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

In the Contacts tab,

- a) Enter customer name.
- b) Find out how this **customer prefers to receive** repair status updates.

Þ.	Add 👻 🔀 Rem	ove				
	Contact Type	Name	Primary Phone	Secondary Phone	Fax	
	Vehicle Owner	Smith, John	(123) 456-7890			
-	Adjuster	TEST, USER1	(312) 229-0406			

If Email is preferred:

• Enter Email address.



How to customer prefers to receive repair updated status

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All Contacts												
Add - × Re	move											
Contact Typ	e Name	Primary Phone	Secondary Phone	Fax			Company					
Vehicle Owne	r Smith, John	(123) 456-7890										
Adjuster	TEST, USER1	(312) 229-0406										
11												
Smith, John												
Smith, John Contact Type:	Vehicle Owner - Insure	d						~	Phone Number(s):	Phone Type	Phone Number 🔦	
Smith, John Contact Type: Company:	Vehicle Owner - Insure	d						~	Phone Number(s):	Phone Type Day • (1	Phone Number	4
Smith, John Contact Type: Company: First Name:	Vehicle Owner - Insure	d						~	Phone Number(s):	Phone Type Day • (1 Business • L	Phone Number ^ 23) 456-7890 X	(†) (†)
Smith, John Contact Type: Company: First Name: Last Name:	Vehicle Owner - Insure	d						×	Phone Number(s):	Phone Type Day • (1) Business • [] Call - (123) 456-7890	Phone Number	
Smith, John Contact Type: Company: First Name: Last Name: Email:	Vehicle Owner - Insure	d							Phone Number(s): Comm. Preference:	Phone Type Day • (1) Business • [] Call - (123) 456-7890 Zuandau (Thumatau)	Phone Number	
Smith, John Contact Type: Company: First Name: Last Name: Email:	Vehicle Owner - Insure	d							Phone Number(s): Comm. Preference: Call Plan:	Phone Type Day • (1 Business • L Call - (123) 456-7890 Tuesday/Thursday	Phone Number ^ 233 456-7890 v	
Smith, John Contact Type: Company: First Name: Last Name: Email: Address(es):	Vehicle Owner - Insure	d Address 1	Address 2 (Dity State	Zip				Phone Number(s): Comm. Preference: Call Plan:	Phone Type Day • (1 Business • Ł Call - (123) 456-7890 Tuesday/Thursday	Phone Number 22 456-7890	
Smith, John Contact Type: Company: First Name: Last Name: Email: Address(es):	Vehicle Owner - Insure	d Address 1 .	Address 2 (Chicago	Dity State	Z/p • 60007				Phone Number(s): Comm. Preference: Call Plan:	Phone Type Day • (1 Business • L Call - (123) 456-7890 Tuesday/Thursday	Phone Number 23) 456-7890	4 4 X 4 4
Smith, John Contact Type: Company: First Name: Last Name: Email: Address(es):	Vehicle Owner - Insure Smith test@test.com Home • 187 N G	d Address 1 .	Address 2 (Chicago	Dity State	Z/p • 0007				Phone Number(s): Comm. Preference: Call Plan:	Phone Type Day • (1 Business • L Cal - (123) 456-7890 Tuesday/Thursday	Phone Number (23) 456-7990)X	
Smith, John Contact Type: Company: First Name: Last Name: Email: Address(es):	Vehicle Owner - Insure	d Address 1 .	Address 2 (Chicago	Dity State	2:p 6007				Phone Number(s): Comm. Preference: Call Plan:	Phone Type Day • (1 Business • E Call - (123) 456-7890 Tuesday/Thursday	Fhone Number A 23) 456-7890 V J	

If Phone Call is preferred:

- Enter preferred phone number.
- Select Call option in the Comm. Preference field.
- Select Call Plan.

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.



• Select Email option in the Comm. Preference field.



Entering Milestone Dates for Repair Status Updates



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.



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