

CCC ONE® Workflow – Appraiser Management

Downloading Assignments

Summary

Downloading assignments from the insurance company is the first step of the process. You will locate, select, and download the appropriate assignments. This job aid reviews the process for downloading assignments in both Google Chrome and Microsoft Edge

Chrome Download

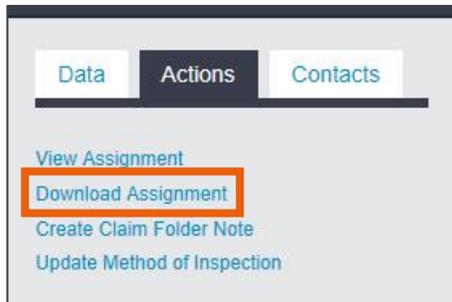
To download an assignment from the Portal in **Google Chrome**, first open the claim you need to download by clicking on the claim number from either the **Worklist** or via the **Assignment Search**.



Claim Reference ID	Insurance Company	Date	Owner
013020	CCC TRAINING	01/30/	

Showing 1 of 1 current claim folders

When the claims details open, locate the **Actions** tab on the left and click **Download Assignment**.



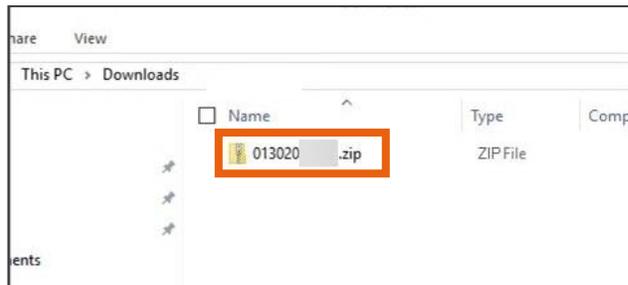
A ZIP file with the claim will download. Once the file is completed, the File Explorer will open with the folder contents. Take note of where the file is downloaded and browse to that location on the user's PC.

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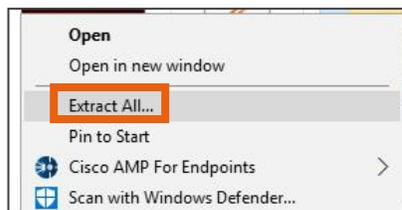
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Downloading Assignments, Continued

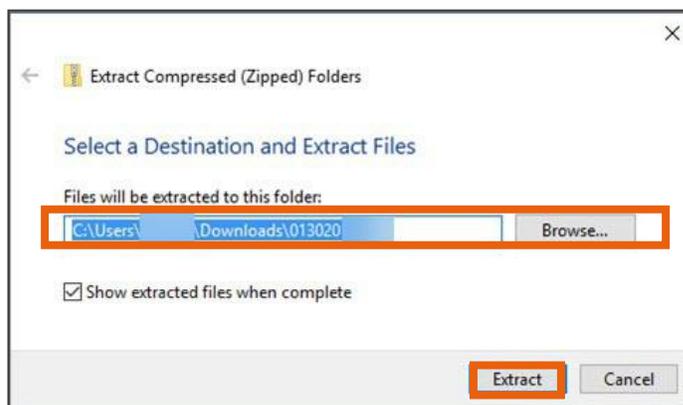
**Chrome
Download,
continued**



Locate the ZIP file that was downloaded. The file name will be the claim number for that assignment. Right click the file and select **Extract All**.



A pop-up will appear asking where you wish to extract the file to. Determine where you wish to extract the files to and click **Extract**.



You can extract the files to the same folder they were downloaded to or directly into the EMS Import file for the customer's Estimating System.

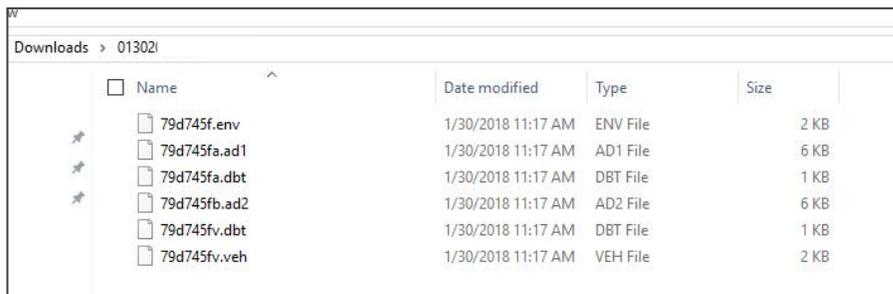
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Downloading Assignments, Continued

**Chrome
Download,**
continued

Once the extract is complete, the File Explorer will open with the contents of the folder.



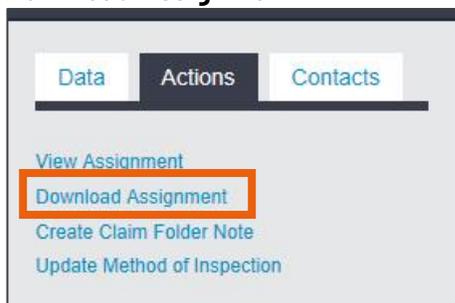
Copy and paste the EMS files into the user’s EMS Import file. The download of the assignment is not required in order to upload.

**Edge
Download**

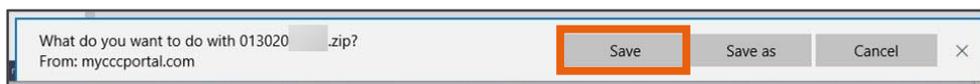
To download an Assignment from the Portal in **Microsoft Edge**, first open the claim you need to download by clicking on the claim number from either the **Worklist** or via the **Assignment Search**.



When the claim’s details open, locate the **Actions** tab on the left and Click **Download Assignment**.



A ZIP file with the claim data will download. Click **Save as** on the download prompt at the bottom of the screen.



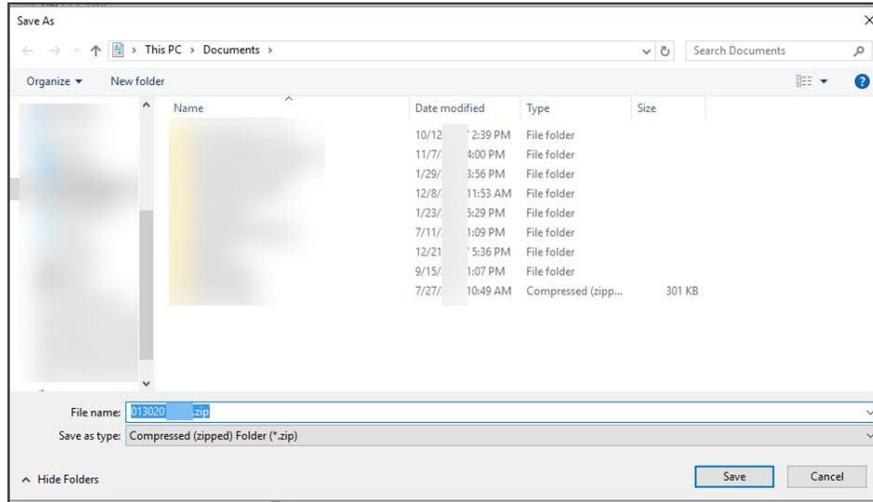
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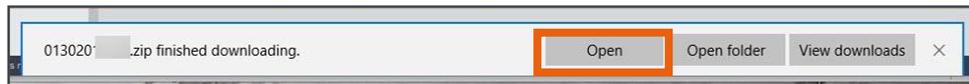
Downloading Assignments, Continued

Edge
Download,
continued

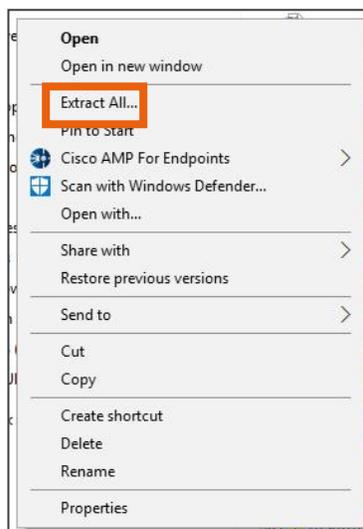
Select a location to download the ZIP file to. You can use either the default download folder or select the EMS Import file the user has configured.



Once the download has finished, click **Open** on the pop-up.



Locate the ZIP file that was downloaded. The file name will be the claim number for that Assignment. Right-click the file and select **Extract All**.



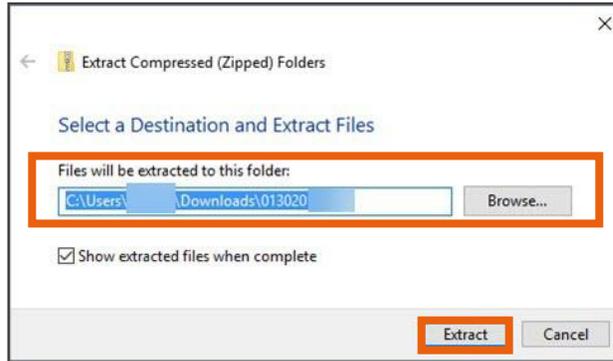
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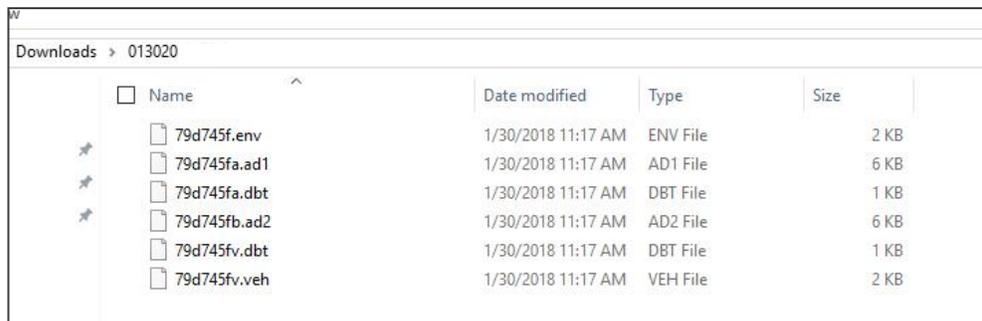
Downloading Assignments, Continued

Edge
Download,
continued

A pop-up will appear asking where you wish to extract the files to. Determine where you wish to extract the files to and click **Extract**.



You can extract the files to the same folder they were downloaded to or directly into the EMS Import file for the customer's Estimating System. Once the extract is complete, the File Explorer will open with the contents of the folder.



Copy and paste the EMS files into the user's EMS Import file. The download of the assignment is not required in order to upload.

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Upload Estimate Data/Files

Summary

When you are ready to upload files to the claim folder, perform the following steps.

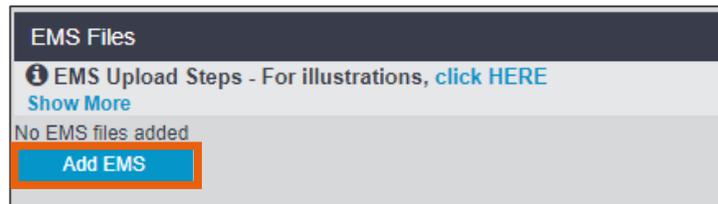
Adding EMS

To upload files to a claim, click the **Claim Reference ID** in the **WorkList** or the **Search** results.

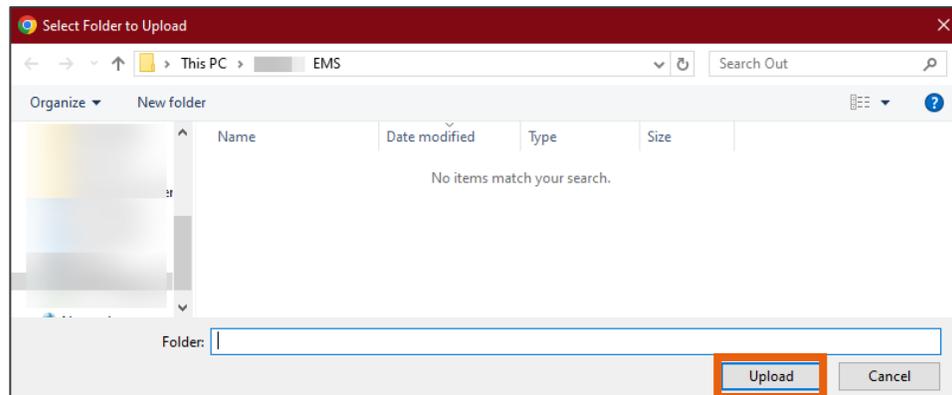


Claim Reference ID	Insurance Company	Date	Owner
013020	CCC TRAINING	01/30/	

The **Upload** section opens. Under the **EMS** header, click the **Add EMS** button.



A File Explorer window opens. Browse to the folder the user exports EMS files to and select **Upload**. The folder will appear blank, **this is working as intended**.



Note: Estimates must be **Locked** or **Committed** to upload.

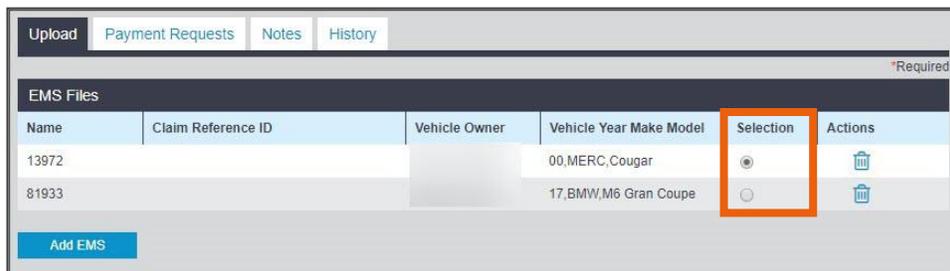
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Upload Estimate Data/Files, Continued

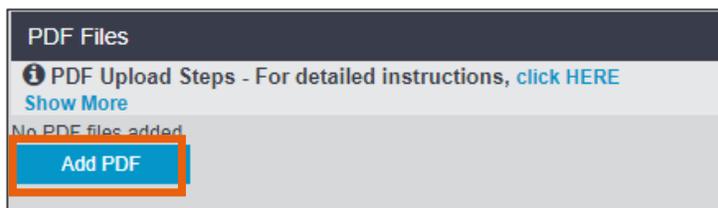
Adding EMS, continued

Any EMS files that are in the folder will appear under the **EMS Files** section. Select the file you wish to upload by using the **radio button** on the right.

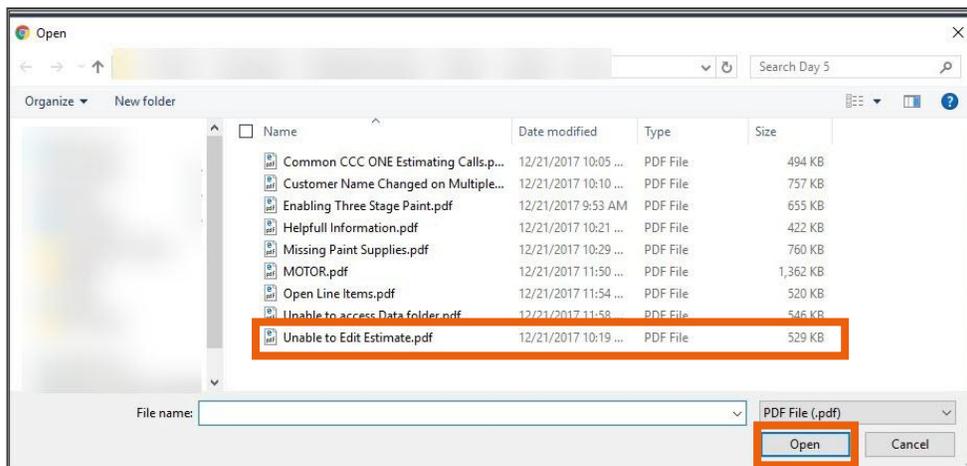


Adding PDFs

Once the EMS is added, move on to the **PDF**. Click the **Add PDF** button to launch the **File Explorer**.



Browse to the folder the PDF is located in, select the PDF the user wishes to upload, and click **Open**.



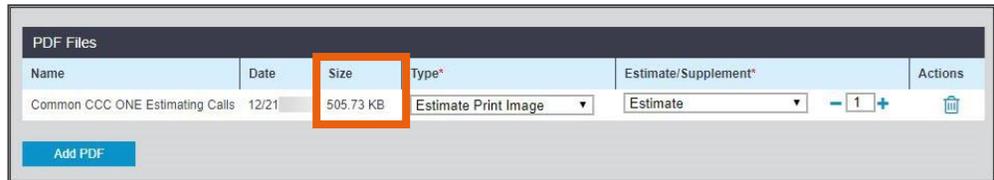
The PDF attaches to the file.

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Upload Estimate Data/Files, Continued

Adding PDFs, continued



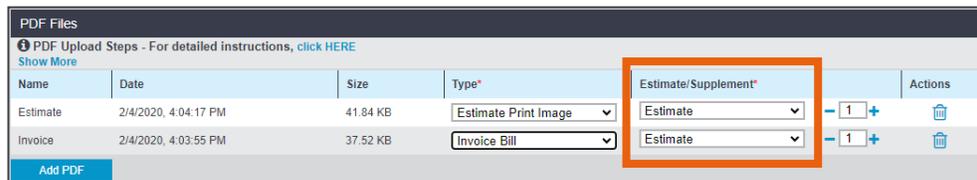
A screenshot of a web interface showing a table of PDF files. The table has columns for Name, Date, Size, Type*, Estimate/Supplement*, and Actions. The 'Size' column for the first row is highlighted with an orange box. Below the table is an 'Add PDF' button.

Name	Date	Size	Type*	Estimate/Supplement*	Actions
Common CCC ONE Estimating Calls	12/21	505.73 KB	Estimate Print Image	Estimate	- 1 +

[Add PDF](#)

Note: You can attach a maximum of **20 MB** of PDFs.

By default, the **Type** is **Estimate Print Image**. If you are uploading a Supplement, use the drop-down under **Estimate/Supplement** to change the type to **Supplement**, and then enter the appropriate Supplement number.

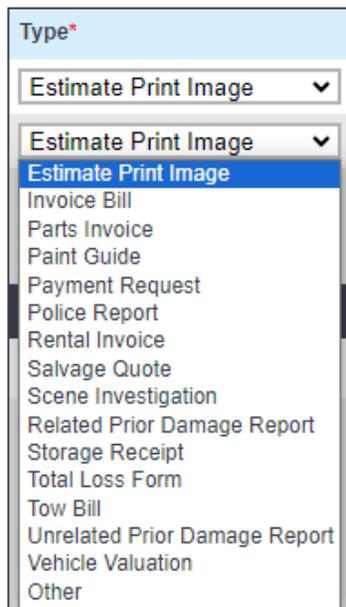


A screenshot of a web interface showing a table of PDF files. The table has columns for Name, Date, Size, Type*, Estimate/Supplement*, and Actions. The 'Estimate/Supplement*' column for the first two rows is highlighted with an orange box. Below the table is an 'Add PDF' button.

Name	Date	Size	Type*	Estimate/Supplement*	Actions
Estimate	2/4/2020, 4:04:17 PM	41.84 KB	Estimate Print Image	Estimate	- 1 +
Invoice	2/4/2020, 4:03:55 PM	37.52 KB	Invoice Bill	Estimate	- 1 +

[Add PDF](#)

If you need to upload a parts invoice or any other PDF documents, use the drop-down under **Type** to select the type of document they wish to upload. Remember, **a PDF copy of the Estimate or Supplement is required.**



A screenshot of a dropdown menu titled 'Type*'. The menu is open, showing a list of document types. The first two items are 'Estimate Print Image', and the rest are: Invoice Bill, Parts Invoice, Paint Guide, Payment Request, Police Report, Rental Invoice, Salvage Quote, Scene Investigation, Related Prior Damage Report, Storage Receipt, Total Loss Form, Tow Bill, Unrelated Prior Damage Report, Vehicle Valuation, and Other.

- Estimate Print Image
- Estimate Print Image
- Estimate Print Image
- Invoice Bill
- Parts Invoice
- Paint Guide
- Payment Request
- Police Report
- Rental Invoice
- Salvage Quote
- Scene Investigation
- Related Prior Damage Report
- Storage Receipt
- Total Loss Form
- Tow Bill
- Unrelated Prior Damage Report
- Vehicle Valuation
- Other

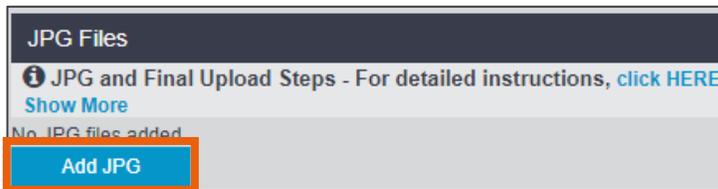
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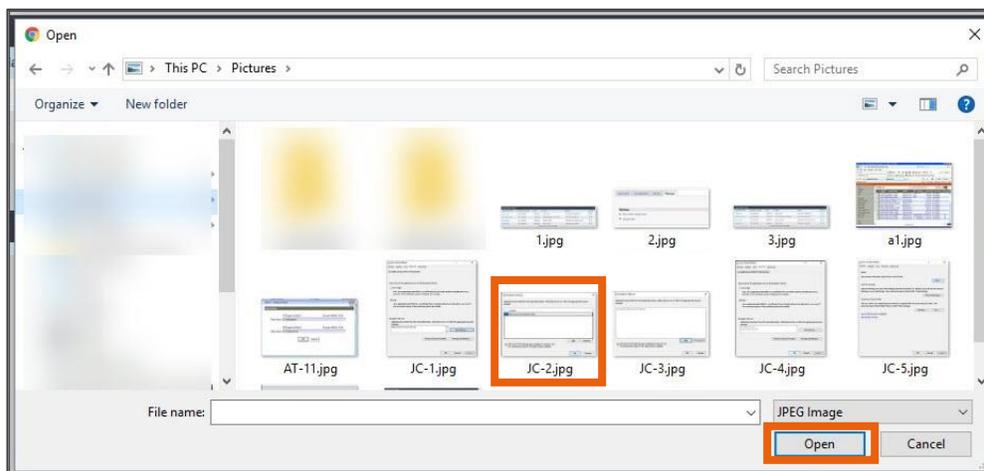
Upload Estimate Data/Files, Continued

Adding JPGs

Once all PDFs are attached, move on to the Images. Click the **Add JPG** button.



The File Explorer will open to the last file that was browsed to. Browse to where the images are stored, select all files you wish to upload, and then click **Open**.



Note: Use **CTRL+Click** to select multiple files **one by one**. Select one file, hold Shift, and select the last image in a series to select the images in that series. The images will be added to the file. Shops may use the **Label, Location, Taken By, and Note fields** to enter additional data about the images. The shop can also change the **Estimate/Supplement drop-down**.

Name	Label	Location	Taken By	Note	Estimate/Supplement*	Actions
JC-5	<input type="text" value="Test"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Estimate <input type="text" value="1"/>	
JC-6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Estimate <input type="text" value="1"/>	
test	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Estimate <input type="text" value="1"/>	

Add JPG

Note: Shops may upload **20 MB** of photos at a time.

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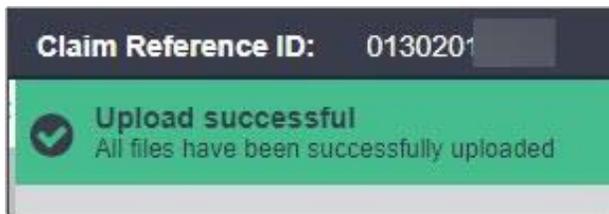
Upload Estimate Data/Files, Continued

Completing the Upload

Once the EMS, PDF and JPG have been added to the file, the file is ready for upload. Click the Upload button in the lower right corner.



Depending on the Insurance Company, an Audit might appear. If the Audit fails, enter a comment, and commence with the upload. When the upload is complete a message will display at the top of the screen.



If any items are rejected, a **message displays in red** and explains why the items failed to upload.