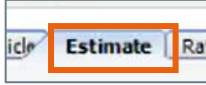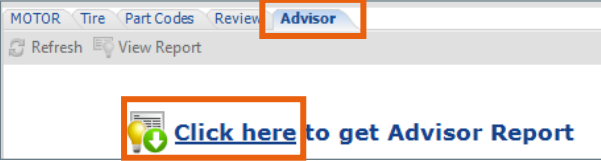# CCC® Estimating – Using Advisor
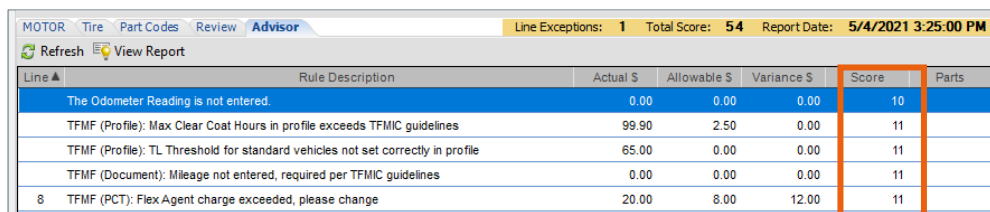
Introduction

Advisor allows you to complete a review of your Workfile before finalizing an estimate or supplement. This will help you identify and clear exceptions before you lock your Workfile in CCC® Estimating. This job aid discusses how to identify and review exceptions and typical ways to address those exceptions. This allows you to finalize the estimate as a "clean" estimate that adheres to the audit rules and shared guidelines.

Review Exceptions

Follow the steps in the table below to run an Advisor Report and then review the exceptions. The **Line Exception** and **Total Score** are indicated on the Estimate tab of the workfile. While it is not always possible to resolve all Advisor flags, as a general rule, the shop's goal is to achieve the lowest score possible.

Step	Action
1	Select the **Estimate** tab on an open estimate workfile.
2	Select the **Advisor** tab to run your estimate against the shop level and insurance guidelines that apply to this workfile. **Note:** If you are clicking the Advisor link for the first time, use the **Click here** link. Once run, the report can be run again by clicking Refresh.
3	While it is best practice to clear or document all exceptions, you must attempt to clear any rules exception that have a score of **11 or more**, in the Score column. The number in the exception's Line column indicates which estimate line contains the exception.

Line	Rule Description	Actual $	Allowable $	Variance $	Score	Parts
	The Odometer Reading is not entered.	0.00	0.00	0.00	10	
	TFMF (Profile): Max Clear Coat Hours in profile exceeds TFMIC guidelines	99.90	2.50	0.00	11	
	TFMF (Profile): TL Threshold for standard vehicles not set correctly in profile	65.00	0.00	0.00	11	
	TFMF (Document): Mileage not entered, required per TFMIC guidelines	0.00	0.00	0.00	11	
8	TFMF (PCT): Flex Agent charge exceeded, please change	20.00	8.00	12.00	11	

(Line Exceptions: 1   Total Score: 54   Report Date: 5/4/2021 3:25:00 PM)

Note: Advisor scores of 11 represent an insurance rule. Any Advisor infraction with a score of 11 that is not able to be resolved should be documented using line notes on the estimate.

CCC® Estimating – Using Advisor, Continued

Removing Exceptions

Exceptions are **removed** by either **adding** the missing information or **changing** it as indicated by the Rule Description column in the Advisor Report. If you cannot clear the exception, follow your company's procedures to document the reasons why.

The **Advisor Report** identifies the affected estimate lines. But the system also displays a **lightbulb** by the line itself, hover over the lightbulb to also view the details.

It is often the case that you will need to navigate to another tab in the Workfile to **clear** the exception by **adding or updating** information. Additionally, you can navigate to the **Part Codes** tab and click Add to Estimate to add items to the Workfile.

Note: The lightbulb shows data also available in the lines below.

Review the examples in the sections below to see how typical exceptions can be **removed**. Then we will show you how to refresh the report, see that the exceptions are cleared, and how to view the report as a PDF.

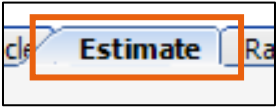**Note:** Steps will vary based on the type of exception(s).

CCC® Estimating – Using Advisor, Continued

Removing Exceptions: Missing Information

Example 1 demonstrates how to remove an exception from the estimate's Workfile by locating and adding the missing information on the proper tab.

Exception: Mileage Not Entered

Step	Action	
1	Go to the **Vehicle** tab.	
2	Add the mileage in the **Mileage In** field.	
3	Select the **Estimate** tab.	
4	Click **Save**.	

Removing Exceptions: Flex Additive

Example 2 demonstrates how to change an exceeded line amount to an allowable amount on the Workfile.

Part	Description
A	The **Actual $** column shows the current price on the Estimate for the Flex Agent.
B	The **Allowable $** column shows the allowable price for the Flex Agent, the price must be at or below this amount to not trigger an exception.
C	The **Variance $** column shows the price difference between the Actual and Allowable amount for the Flex Agent.

Exception: Flex Agent charge exceeded.

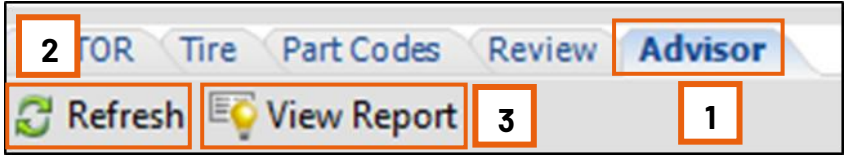| Step	Action	
1	Select the **Estimate** tab on an open Estimate.	
2	Select the Exception line **Price**.	
3	Enter a **Price** in the allowable range.	
4	Click **Save**.	

CCC® Estimating – Using Advisor, Continued

| **Refresh Advisor Tab** | Follow the steps in the table below to **remove exemptions** from the **Advisor** tab once the exceptions have been cleared: |

Step	Action
1	Select the **Advisor** tab.
2	Select the **Refresh** button. Advisor runs again and a new report generates. The exception is now removed.
3	Select the **View Report** button to view a PDF of the report. The report opens in a new window.

Note: Ensure that all the required events are added and updated from the Events tab before locking the estimate, to expedite the payment process and prevent delays.