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.

Follow the steps in the table below to run an Advisor Report and then review Review the exceptions. The Line Exception and Total Score are indicated on the **Exceptions** 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 nossihle

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. Motor Tire Part Code Review Advisor Refresh View Report Click here to get Advisor Report 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.

MOTOR	Tire Part Codes Review Advisor	Line Exception	ons: 1	Total Score: 54	Report Date:	5/4/2021 3	25:00 PM
🕃 Refr	esh 🔤 View Report						_
Line 🛦	Rule Description		Actual S	Allowable \$	Variance \$	Score	Parts
	The Odometer Reading is not entered.		0.0	00.00	0.00		
	TFMF (Profile): Max Clear Coat Hours in profile exceeds TFMIC guidelines		99.9	2.50	0.00	11	
	TFMF (Profile): TL Threshold for standard vehicles not set correctly in profile		65.0	00.00	0.00	11	
	TFMF (Document): Mileage not entered, required per TFMIC guidelines		0.0	00.00	0.00	11	
8	TFMF (PCT): Flex Agent charge exceeded, please change		20.0	00.8.00	12.00	11	

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

Exceptions are **removed** by either **adding** the missing information or **changing** Removing it as indicated by the Rule Description column in the Advisor Report. If you **Exceptions** 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.

	#	/ кері	Cover Car					1	10.00	10.00	1	0.0 0.0
	#	8 Repl	Flex additiv	ve				1	20.00	20.00	т	0.0 0.0
3												
		Description	n	Actual \$	Allow \$	Varian	ce\$	Sc	ore			
	TFMF (PCT): F	Flex Agent charge exc	eeded, please change	20.00	8.00		12.0	0	11			
L												
ото	R Tire Parl	t Codes Review A	dvisor		Line Exc	eptions:	1 To	tal Score:	54	Report Date	e: 5/4/202	1 3:25:00 PM
🖁 Ref	fresh 🔤 View	v Report										
_	· ·	v Report	F	Rule Descriptior	n	Actu	al S	Allowable	es Vi	ariance \$	Score	Parts
J Ref Line ▲	· · ·	v Report r Reading is not entere		Rule Descriptior	n	Actu	al S 0.00		e S Va .00	ariance \$ 0.00	Score 10	
_	The Odomete	r Reading is not entere			n	Actu		C				
_	The Odomete	er Reading is not entere): Max Clear Coat Hour	ed.	guidelines	n	Actu	0.00	C 2	.00	0.00	10	
_	The Odomete TFMF (Profile) TFMF (Profile)	r Reading is not entere): Max Clear Coat Hour): TL Threshold for sta	ed. 's in profile exceeds TFMIC	guidelines rectly in profile	n	Actu	0.00 99.90	0 2 0	.00	0.00 0.00	10 11	
_	The Odomete TFMF (Profile) TFMF (Profile) TFMF (Docum	r Reading is not entere): Max Clear Coat Hour): TL Threshold for sta nent): Mileage not enter	ed. 's in profile exceeds TFMIC ndard vehicles not set corr	guidelines rectly in profile	n	Actu	0.00 99.90 65.00	0 2 0 0	.00 .50 .00	0.00 0.00 0.00	10 11 11	

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.

мото	R Tire Part Codes Review Advisor	Line Excep	tions:	1	Total Score: 54	Report Date:	5/4/2021	3:25:00 PM
😅 Ref	resh 🛯 🖉 View Report							
Line 🔺	Rule Description		Act	ual S	Allowable \$	Variance \$	Score	Parts
	The Odometer Reading is not entered.			0.0	0.00	0.00	10	
	TFMF (Profile): Max Clear Coat Hours in profile exceeds TFMIC guidelines			99.9	0 2.50	0.00	11	
	TFMF (Profile): TL Threshold for standard vehicles not set correctly in profile			65.0	0.00	0.00	11	
	TFMF (Document): Mileage not entered, required per TFMIC guidelines			0.0	0.00	0.00	11	
8	TFMF (PCT): Flex Agent charge exceeded, please change			20.0	0 8.00	12.00	11	

Exception: Mileage Not Entered

Step	Action	
1	Go to the Vehicle tab.	te Vehicle Es
2	Add the mileage in the Mileage In field.	Mileage In: 75325
3	Select the Estimate tab.	cle Estimate Ra
4	Click Save .	Save



CCC° Estimating – Using Advisor, Continued

Removing Exceptions: Flex Additive

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

9 13	# 8 Repl Flex add	itivi A	В	С	1 20.0	0 20.00 T	0.0	0.0
	Description	Actual \$	Allow \$	Variance \$	Score			
	TFMF (PCT): Flex Agent charge exceeded, please change	20.00	8.00	12.0	00	11		
MOTOR	R Tire Part Codes Review Advisor		Line Except	io A	Dta B 4	C ^{te:}	5/4/2021 3	8:25:00 PM
Line 🛦	* *	Rule Description	1	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 TFM	IC guidelines		99.90	2.50	0.00	11	
	TFMF (Profile): TL Threshold for standard vehicles not set co	orrectly 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	

Part	Description
А	The Actual \$ column shows the current price on the Estimate for the Flex Agent.
В	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.
С	The Variance \$ column shows the price difference between the Actual and Allowable
	amount for the Flex Agent.

Exception: Flex Agent charge exceeded.

		iek Ayent chary							
5	Step	Action							
	1	Select the Estimate tab on an open Estimate.				cle	Estima	ate R	
	2	Select the Exc	eption line Price .						
		6 R&I	RT R&I headlamp assy	0		0.00	0.00	0.3	0.0
	#	7 Repl	Cover Car	1		10.00	10.00 T	0.0	0.0
9	#	8 Repl	Flex additive	1		20.00	20.00 T	0.0	0.0
	3	Enter a Price i	n the allowable range.						
		6 R&I	RT R&I headlamp assy		0	0.00	0.00	0.3	0.0
	#	7 Repl	Cover Car		1	10.00	10.00 T	0.0	0.0
9	#	8 Repl	Flex additive		1	8,00	20.00 T	0.0	0.0
	4	Click Save .				Save			



CCC® Estimating - Using Advisor, Continued

Refresh Advisor Tab		e steps in the table below to remove exemptions from the Advisor tab 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.
		2 FOR Tire Part Codes Review Advisor Image: Comparison of the second seco

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.

