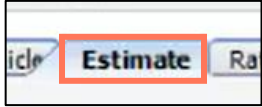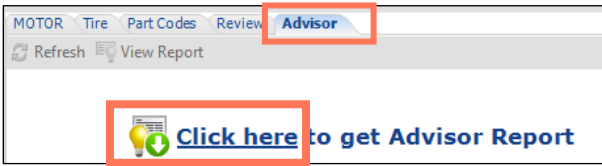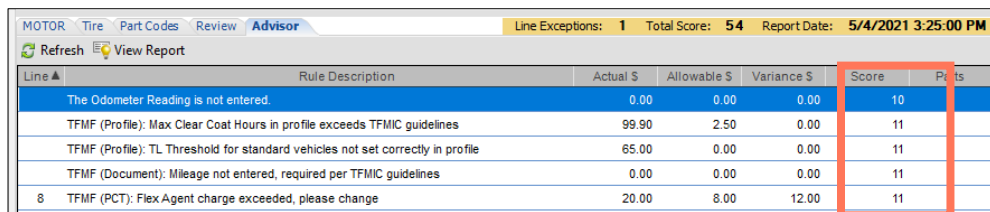# CCC® Estimating – Using Advisor

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 **Advisor** run your estimate against the tab to 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	

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 light bulb 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.

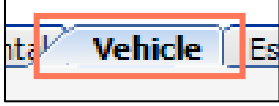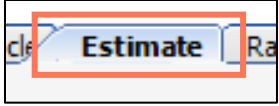**Note:** Steps will vary based on the type of exception(s).

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.

MOTOR Tire Part Codes Review **Advisor**		Line Exceptions: 1	Total Score: 54	Report Date:	5/4/2021 3:25:00 PM	
🔄 Refresh 📄 View Report						
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	

Exception: Mileage Not Entered

Step	Action	
1	Go to the **Vehicle** tab.	nta 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

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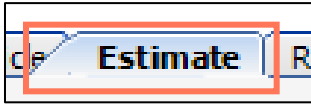
Removing Exceptions: Flex Additive
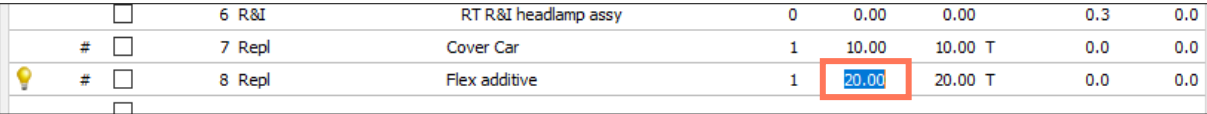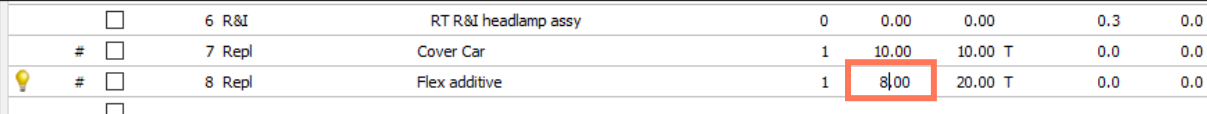
Example 2 demonstrates how to change an exceeded line amount to an allowable amount on the workfile.

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.

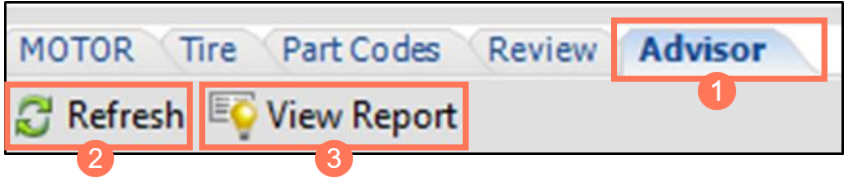| Step	Action
1	Select the **Estimate** tab on an open Estimate.
2	Select the Exception line **Price**.
3	Enter a **Price** in the allowable range.
4	Click **Save**.

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.