CCC° Contact Center – Configuration

Introduction	This document details the setup and configuration of a Repair Facility's Contact Center in CCC ONE®.			
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CCC° Contact Center - Configuration

Target Audience	Call Center Representative/User with Administrative roles.							
Setting Work Hours and Security Roles	RF with Call Center needs to be set up with work hours and security roles. 1. Log in to CCC ONE . 2. Select Configure on top right and then select Security Roles from the list.							
	Configure Tools Sea My Account ↗ Profiles ↗ Machine Settings Ĩ Employees Ĩ Teams Security Roles Work Hours ✓							
	 3. Double-click the role as needed from the list. In the window that displays select the following two roles for this user and click OK. View, schedule, and dispatch assignments from Contact Center Contact Center Paperts – to view contact center reports 							
	Search Results Pow Role Refresh Print Print Preview Print Description User Count Admin User 9 Paber Assignments 0							
	Basic User - Role X Role Users (0) Name: Basic User Description: Image: Basic User Select user permissions for this role from the lata below: Image: Basic User Image: Balefins - Wanage insurance bulletins Image: Basic User Image: Balefins - Wanage insurance bulletins Image: Basic User Image: Balefins - Wanage insurance bulletins Image: Basic User Image: Balefins - Wanage schedule of appointments Image: Basic User Contex Image: Contex Contex - Seven schedule, and Basich assignments from Context Center Image: Basic User reports Image: Communication - Complete service recovery on hotherets Image: Basic View repair management reports Image: Context - Context - Seven's and View (desdorth) austomer contacts Image: Basic View repair management reports Image: Contact - Contact - Seven's and View (desdorth) austomer contacts Image: Reports AIP - Center, edit, and delete personal reports and RPI dashboards Image: Contact - Contact - Seven's and View (desdorth) austomer contacts Image: Reports AIP - Center, edit, and delete personal reports and RPI dashboards Image: Contact - Contact - Seven's and View (desdorth) austomer contacts Image: View repair management reports Image: Contact - Seven's end view (desdorth) austomer contacts Image: View repair managem							

and - Ma - Perform diagnostic scans

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Setting Profiles You need to set up a profile:

- at the MSO level for MSOs or
- for a single store with contact center

Follow the steps below to set up this profile:

- 1. Select **Configure > Profiles** from the list.
- 2. On the Profiles Settings window, expand Repair Management and select Contact Center.

Profile Settings									×
File Help									
🚽 Save 🚽 Save and Close									
Fender Bender									
Basic Settings	Call	Queue Settings			Appointn	nent Duration			
E Repair Management	Item	lock expires after:	5 minutes	\sim	Estimate a	appointments:	30 minutes	s ~	
Central Review	Earli	iest call time:	8:00 AM	\sim	Repair ap	pointments:	30 minutes	s ~	
Contact Center Customer Communication Customer Solidation	Late	est call time:	6:00 PM	\sim	Send	confirmations via tex	t/email		
Data Sharing	Deta	ault call back time:	1 hour	\sim					
		Notes required when item	dispatched withou	scheduling					
Marketing - Referral Sources	Inst	urance Company Rules							
Parts - Credit Memos	+	Add 🗶 Delete							0
Parts - Return Reasons	-	Insurance Co	ompany	Load Level	New Assignments	Reassign	ment	Dispatched	
Receipt - Types	►	Default		Allow -	Call within 1 hour	 Call within 1 ho 	ur 🔻	Call not required	•
	1								
Sales - Labor Accounts									
Sales - Miscellaneous Accounts									
Sales - Parts Accounts									
Timecard Settings									
UpdatePlus									
Workfile - Cancel Reasons									

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Setting Profiles, s continued	The Call Queue settings window displays basic settings that you need to set up.
ltem lock expire after	To set up when an item lock will expire. For example, a Call Center representative working on an assignment has forgotten to complete the schedule and left for lunch. It will unlock after the specified time for another user/representative to manage. The Call Center user can override the current user but does not have viewing capabilities.
Earliest and Latest Call Time	Allows you to specify the time frame you will make calls to your customers. For example, you do not want to call customers: Prior to 9 am, set the Earliest Call time to 9 am. After 6 pm, set the Latest Call time to 6 pm.
	This will warn the Call Center representatives if they try to make calls outside this time frame. This also takes into consideration the time zone for the Call Center and the RF. For example, calling a customer in a Central time zone location at 9 am from an Eastern time zone will give a warning since it is only 8 am in the Central time zone.
Default Call Bac Time	k Automatically shows the call back time when you go ahead and schedule an appointment. You can always change the call time manually.
Notes required when items dispatched without scheduling	Select if you want the note to be entered prior to dispatching those assignments that have not been scheduled.
Estimate Appointments and Repair Appointments	Time needed for estimate and repair appointments as indicated by the RF. Typically, time required for an estimate schedule is less than a repair schedule as per RF requests (30/60 minutes).
Send Confirmation vi text/email	Select to send appointment confirmation and reminders using text or email.

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Insurance To set up rules dictated by insurance companies, you must add those Company insurance companies and specify rules according to their guidelines. **Specific Rules** and Guidelines To add an insurance company, click **Add**. Similarly click **Delete** if you no

longer need to specify rules for the Insurance Company. Insurance companies not in the list will assume default settings.

Profile Settings			×
File Help			
🚽 Save 🚽 Save and Close			
Fender Bender			
Basic Settings	Call Queue Settings	Appointm	nent Duration
Repair Management Carwise	Item lock expires after: 5 minut	s v Estimate a	appointments: 30 minutes V
	Earliest call time: 8:00 Al	✓ Repair ap	opointments: 30 minutes V
Contact Center	Latest call time: 6:00 Pt	Send	confirmations via text./email
Customer Satisfaction	Default call back time: 1 hour	\sim	
Labor - Work Orders Labor - Work Orders Line item Mapping Rules Sarawa Marketing - Age Ranges Sarawa Marketing - Custom Fields	Notes required when item dispatche	without scheduling	
Marketing - Referral Sources	Insurance Company Rules		
Parts - Credit Memos	🕂 Add 💥 Delete		0
Parts - Return Reasons	Insurance Company	Load Level New Assignments	Reassignment Dispatched
Receipt - Types	▶ Default	Allow Call within 1 hour	 Call within 1 hour ▼ Call not required
- Que Receipt - Void Reasons - Que Rental - Que Rental - Que Rental - Que Research - Que Receipt - Void Reasons - Que Re			
Workfile - Cancel Reasons			

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Insurance Company Specific Rules and

Guidelines, continued

Load Level	Allows Contact Center representatives to change the location of RF that assignments can go to, irrespective of the originally assigned RF. (Controls volume that goes to the shop). You can select Allow or Do Not Allow as per the Insurance Company's guideline.					
New Assignments	This is to indicate a call time when the Call Center representative needs to call the customer. If not satisfied, this assignment will display in red in the Call Queue indicating it's past due.					
	Note: It is a good idea to set this time lower than the specified guideline to provide enough time for the Contact Center representative to satisfy the target deadline.					
	Note: If the Insurance Company does not want the Contact Center to manage assignments and wants them to go directly to the assigned RF, select the Automatically Dispatch option here. In this case, Contact Center will not need to manage this assignment and it will flow directly to the assigned RF.					
Reassignment	You can set the time when a Call Center representative needs to contact a customer for reassignments. If not satisfied, this assignment will display in red in the Call Queue indicating it's past due.					
Dispatched	Set up a time period for when the Call Center representative needs to call customers after they dispatch. This depends on workflow of Repair shops. You can also select call not required here.					
i icon	Hover over the i icon with your mouse to view descriptions for setting options.					

Ins	Irance Company Rules									
+/	Add 💥 Delete									0
	Insurance Company	Loa Lev	id el	New Assignmen	Its	Reassignment		Dispatched		QUALITY COLLISION - CENTRAL
	Default	Allow	•	Call within 1 h	•	Automatically	•	Call within 2 h	•	
Þ	CCC INSURANCE COMPAN	Allow	•	Call within 1 h	•	Call within 1 h	•	Call not requir	•	
										Load Level Allows an assignment to be dispatched to any shop location within the or-
										New Assignments Sets the initial "Call By" time when a new assignment is received. If set to then all assignments for the specified insurance company will be sent din selected by the insurance company.
										Reassignments Sets the initial "Call By" time when a reassignment is received from the in to "Automatically dispatch", then the assignment will be sent directly to th by the insurance company in the reassignment.

Once you are done setting up, click **Save and Close**.



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