

# Request Valuation

## Introduction

This job aid demonstrates how to submit a Valuation Request from a workfile within CCC ONE® Repair Workflow.

**Note:** The process is the same for CCC ONE Estimating Users. The only difference for submitting a total loss is that Workfile is called an Opportunity or Repair Order.

## Before You Begin

Complete the required information on any or all of the workfile tabs, including (but not limited to):

- **Contacts Tab:** Insured, Adjuster information must be added
- **Vehicle Tab:** VIN

**Note:** Contact and Vehicle fields are required to submit a Valuation Request. Once entered, you can write an estimate or submit a Total Loss Request. If no estimate is required, go directly to the **Total Loss** Tab.

## Contacts Tab

Enter the following information.

Step	Action
1	Add <b>Insured Last Name</b> .
2	Add the <b>Adjuster</b> .
3	Add all of the Adjuster's pertinent information.

The screenshot shows the 'Contacts' tab in the software interface. At the top, there are several tabs: Contacts, Insurance, Inspection, Rental, Vehicle, Estimate, Rates, Attachments, Tasks, Total Loss, Notes, Events, and Forms. Below the tabs, there is a section for 'All Contacts' with 'Add' and 'Remove' buttons. A table lists contacts with columns for Contact Type, Name, Primary Phone, Secondary Phone, Fax, and Company. Two contacts are listed: 'Vehicle Owner' and 'Adjuster'. The 'Adjuster' contact is selected, and an orange arrow points to the 'Adjuster' dropdown menu in the form below. The form includes fields for Contact Type (set to 'Adjuster'), Company, First Name, Last Name, and Email. There is also a 'Phone Number(s)' section with a table for Phone Type and Phone Number. On the right side, there are sections for 'Tracking Information' (Estimator, Priority) and 'Marketing Information' (Primary Referral, Secondary Referral, Age, Gender).

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## Request Valuation, Continued

**Vehicle Tab: Description** Enter the following Vehicle Description information.

Step	Action						
1	Enter <b>VIN</b> and all related Vehicle information.						
	<table border="1"> <thead> <tr> <th>If...</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>VIN is known</td> <td>Enter the VIN and decode it. If it decodes correctly, a <i>Good VIN</i> message displays.</td> </tr> <tr> <td>VIN is not known</td> <td>Enter <b>UNK</b> and click <b>Select Standard Vehicle</b>. Select a vehicle from the list.</td> </tr> </tbody> </table>	If...	Then...	VIN is known	Enter the VIN and decode it. If it decodes correctly, a <i>Good VIN</i> message displays.	VIN is not known	Enter <b>UNK</b> and click <b>Select Standard Vehicle</b> . Select a vehicle from the list.
If...	Then...						
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VIN is not known	Enter <b>UNK</b> and click <b>Select Standard Vehicle</b> . Select a vehicle from the list.						
2	Enter <b>Mileage</b> .						

**Vehicle Tab - Options** For each category listed on the right, check the applicable options. A summary of selections is listed on the left for reference.

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## Request Valuation, Continued

### Request Procedure

Use the following steps to **Submit a Valuation Request** on the Total Loss tab of the workfile.

**Important:** Make sure you entered the **Adjuster's** name on the Contacts Tab first. If you forget, you will receive an error message that takes you back to the Contacts Tab.

Perform the following steps in the **Valuation** section under the Total Loss tab.

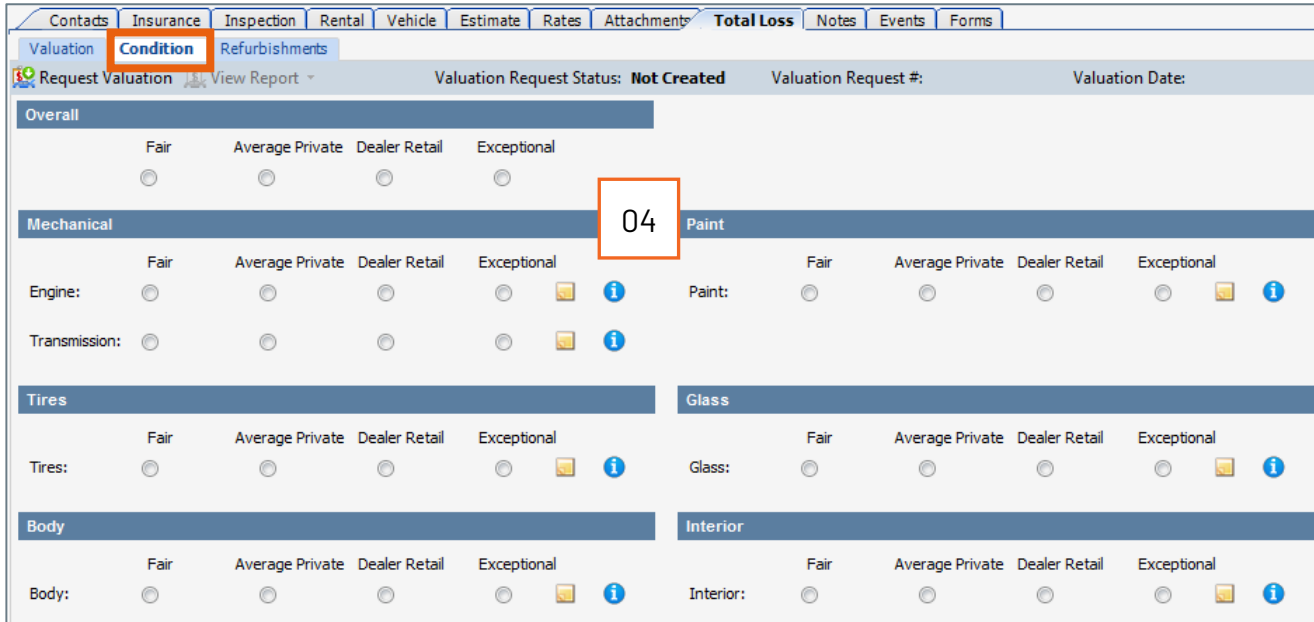
Step	Action						
1	The <b>Zip Code</b> where the Loss Vehicle is garaged is entered also on the workfile Contacts Tab.						
2	Enter <b>Tax information</b> . <table border="1" data-bbox="548 1371 1507 1623"> <thead> <tr> <th>Field</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><b>Tax Type</b></td> <td>Default selection is <b>Auto Tax</b>, which allows CCC to calculate Sales Tax based on the Loss Zip Code.</td> </tr> <tr> <td><b>Send Deductible as an Adjustment</b></td> <td>Check this box on every valuation so the deductible is applied appropriately.</td> </tr> </tbody> </table>	Field	Description	<b>Tax Type</b>	Default selection is <b>Auto Tax</b> , which allows CCC to calculate Sales Tax based on the Loss Zip Code.	<b>Send Deductible as an Adjustment</b>	Check this box on every valuation so the deductible is applied appropriately.
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<b>Send Deductible as an Adjustment</b>	Check this box on every valuation so the deductible is applied appropriately.						
3	You can enter information into the <b>Special Instructions to CCC</b> field. <b>Note:</b> This will result in the Valuation not being completed instantly. A Valuator will need to manually review the Special Instructions.						

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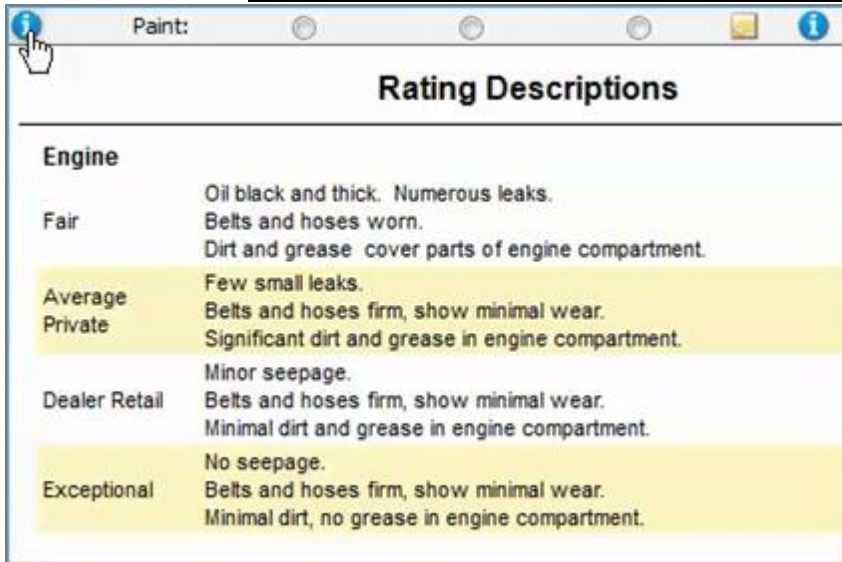
# Request Valuation, Continued

**Request Procedure,**  
continued

Perform the following steps in the **Condition** section under the Total Loss tab.



Step	Action
4	Complete the <b>Condition</b> sub tab to indicate the Vehicle's current condition.  Once you select an <b>Overall Condition</b> , you can change a specific category's Condition by selecting a different option in that Category.




	Use the <b>Note</b> icon to add details to a Category selection.
	Use the <b>Information</b> icon to Insurer-specific <b>Rating Descriptions</b> for each Category prior to making your selections if needed.

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## Request Valuation, Continued

### Submit Request

Once you have entered all the necessary information, perform the following steps to complete the request.

Step	Action
1	Return to the <b>Valuation</b> sub tab.
2	Once you have completed all required information, click the <b>Request Valuation</b> button on the toolbar.
3	You will receive notification that the Request was submitted.  The status on the workfile will change: 
4	When the Valuation Report is returned, click <b>View Report</b> on the <b>Total Loss</b> tab, or go to the <b>Attachments</b> tab on the Workfiles View Preview pane to view the PDF copy.  <b>Note:</b> Some Insurers do not allow the Shop to receive the completed Valuation.