How to Merge a Workfile with an Insurance Assignment

Overview There will be occasions when you will need to merge an existing, manually created workfile with an Insurance Company Assignment or an EMS Assignment. You can merge them with a New Assignment if the manually created workfile is not Locked or a Total Loss.

This job aid describes how to merge an existing Workfile with an Insurance Company Assignment.

Procedure Use the following steps to merge a manually created Workfile with an Assignment from the Insurance Company:

Step	Action					
1	To begin, make sure you are on the Workfiles View so that you can see all of your Workfiles and Assignments.					
2	Click once on the New Assignment to select it.					

Quic	Quick Search Results											
🔤 Op	🙀 Opportunity 🙀 Repair Order 🗙 Remove All New Estimates 🦪 Refresh 🚍 Preview 🚔 Print 👻 🔛 Export											
	Updates	▼ Linked	Priority	Estimate Version	RO Number	Owner	Primary Phone	Vehicle	Estimate \$	Insurance Compan	y Claim Number	Estimator
📄 🤞	New Assignme	int				Sattler, Ellie	(630) 901-8872 Cell	2018 TOYO Corolla L w/		(()) CCC TRAINING	LSG06232022-1	
			8	🔒 E01		Goodwin, Kenneth	(123) 455-6789 Cell	2014 KIA Rio EX Automatic	3,659.73	(") CCC TA L New	두 Action 👻 🏲 Priority 🕶 🕯	🚔 Print 🙀 Send 🖈
b			7	🔒 E01	1076	Goodwin, Kenneth	(630) 597-8894 Cell	2014 HOND Civic Sedan	4,378.45	(()) CCC TRAINING	🔽 Assign Estimator	
>			4	🔒 E01		Goodwin, Kenneth	(630) 597-8894 Cell	2014 HOND Civic Sedan	4,378.45	(()) CCC TRAINING	Accept Opportunity	
>			17	🔓 S01	1073	Mitsakopoulos, Mi	(224) 213-0470 Cell	2014 HOND Civic Sedan	11,906.83	((T)) CCC TRAINING	Convert to Repair Ord	er
b			7	🔒 S01		Goodwin, Kenneth	(123) 456-7890 Cell	2014 KIA Rio LX Automatic	1,416.		Merge	
>			Ŷ	S01	1077	Goodwin, Kenneth	(123) 456-7890 Cell	2014 KIA Rio SX Automatic	2,722.			
			7	E01	1069	Ro, Test		2018 TOYO Corolla LE w	4,519.98		× Delete	
>			17	E01	1071	Williams, Jennifer		2018 SUBA BRZ Premiu	0.00			Shannon Binish
			7	E01	1072	Queen, Xenomorph	(630) 890-0997 Cell	2019 TESL Model S AWD	3,752.43			Shannon Binish

3	Go to Actio screen will	n on the mini-toolbar, an open.	d select Merge . The	Merge-Select Workfile
	Merge		×	
	Plea: mode	etect Workfile se search for and select the workfile to merge with. Searc et, and/or VIN.	h by vehicle owner, claim number, make,	
	Insurance Company: Co Search Terms:	CC TRAINING	Match all of the words V Search	
		No search results fo	und	
			Next Cancel	

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How to Merge a Workfile with an Insurance Assignment, Continued

Procedure,

continued

Step	Action					
4	Enter a Search term. Then click Search , or leave blank and Search .					
5	Select the Workfile to merge.					
6	Click Next . The Confirm Merge screen displays.					

Please	firm compa	ne and confirm data to be merged.				
		Assignment	1	Norkfile		
Vehicle Owner:	0		0	Mark,		
Insurance Company:						
Claim Office:		NORTHERN NEW ENGLAND				
Claim Number:		eq				
Vehicle:	0	2012 TOYOTA TUNDRA CREWMAX 4X4 V8	۲	2012 TOY CREWMA	O TUNDRA	4X4
VIN:		51		5T		
Estimate Amount:				\$0.00		
			1	Back	Next	Cancel

Step	Action				
7	Review and confirm the Assignment and Workfile information to be merged.				
8	Click Next.				
9	If you have already added images or attachments, select the ones to merge with the Assignment and send to the Insurer.				
	Send to Insurance Please select attachments to send to the insurance company.				
	Finish				
10	Click Finish.				

Note: The workfile opens for you to continue working. Remember to Save and Close.

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