# Profile Overview

**Overview**

This document provides an overview of the common Profile Settings you may use when setting up your profiles.

**Note:** If you receive an assignment from a Claim Office whose profile you do not currently have set up in your unit, you will be prompted to add that profile.

**Profile Settings**

Use the table below to navigate to the Profile Settings that are covered in this overview.


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**Note:** You can find complete details about profiles in the Help system.

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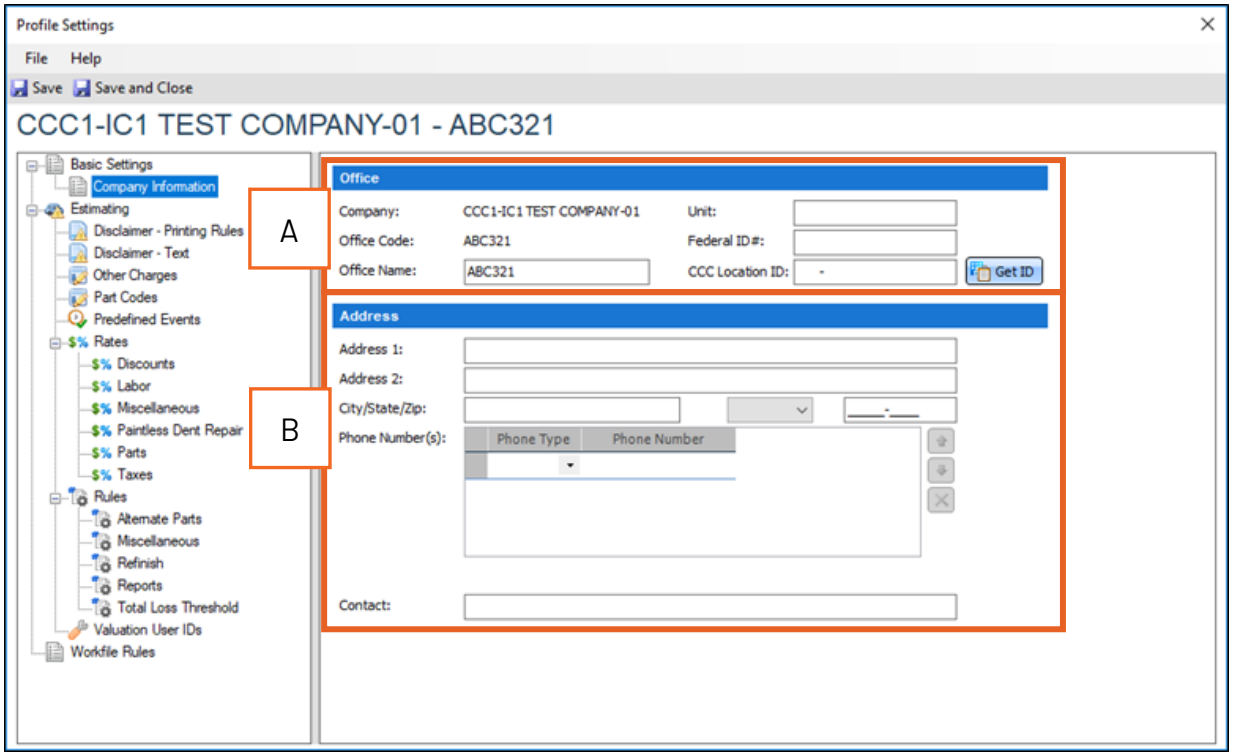
**Basic Settings** This section covers the **Basic Settings** section on the Profile Settings in the estimating application.

**Company Information**

This section allows you to add (A) **Office** and (B) **Address** information in the fields below for the selected claim office.

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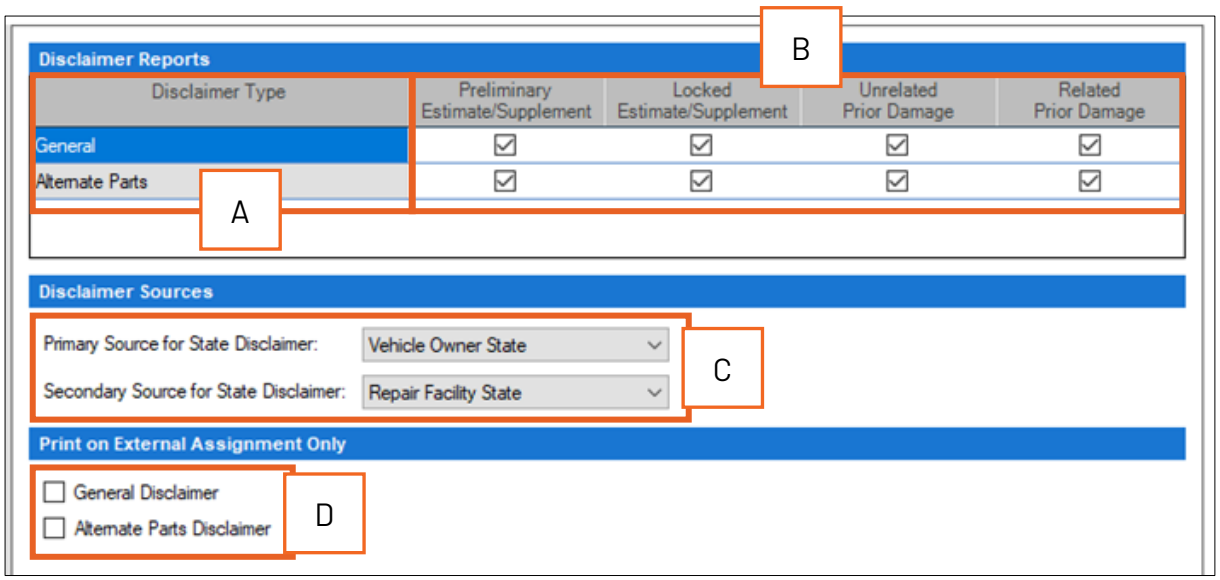
**Estimating** This section covers the **Estimating** section on the Profile Settings in the estimating application.

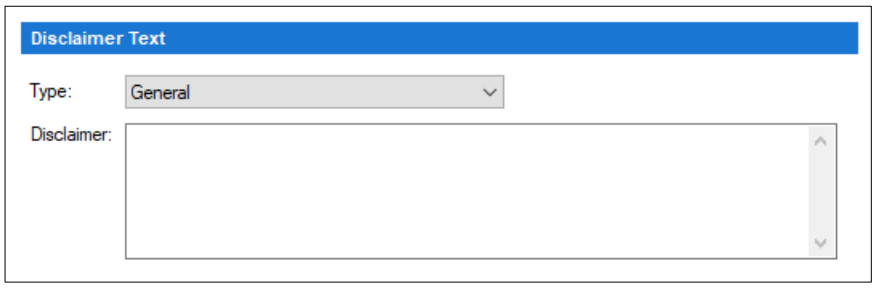
### Disclaimer – Printing Rules

This section allows you to set up the defaults used to determine which disclaimers to print on your reports. The (A) **Disclaimer Type** column is a list of disclaimers that you can select using the (B) **checkboxes** to print on each estimate report document. You can also select the (C) **Disclaimer Sources** and select which disclaimers print on (D) **External Assignments Only**.




### Disclaimer - Text

This section allows you to View or Edit disclamer text that appears in Estimate Reports.
**Note:** Only **General** and **Alternate Part** disclaimer text can be edited.

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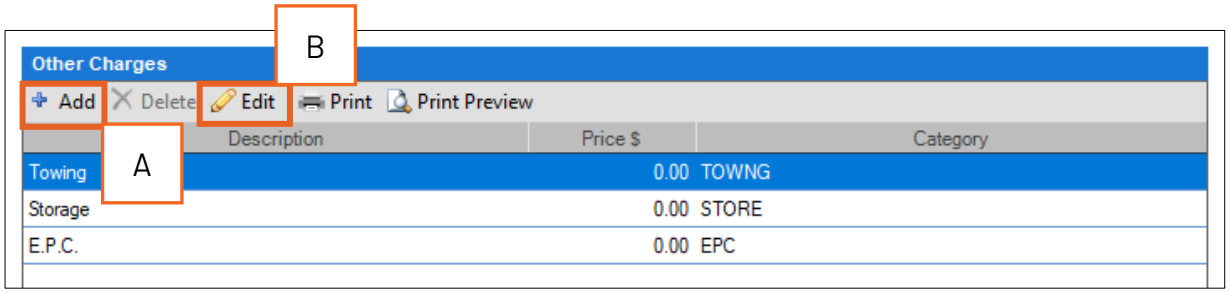
**Estimating,** continued

This section covers the **Estimating** section on the Profile Settings in the estimating application.

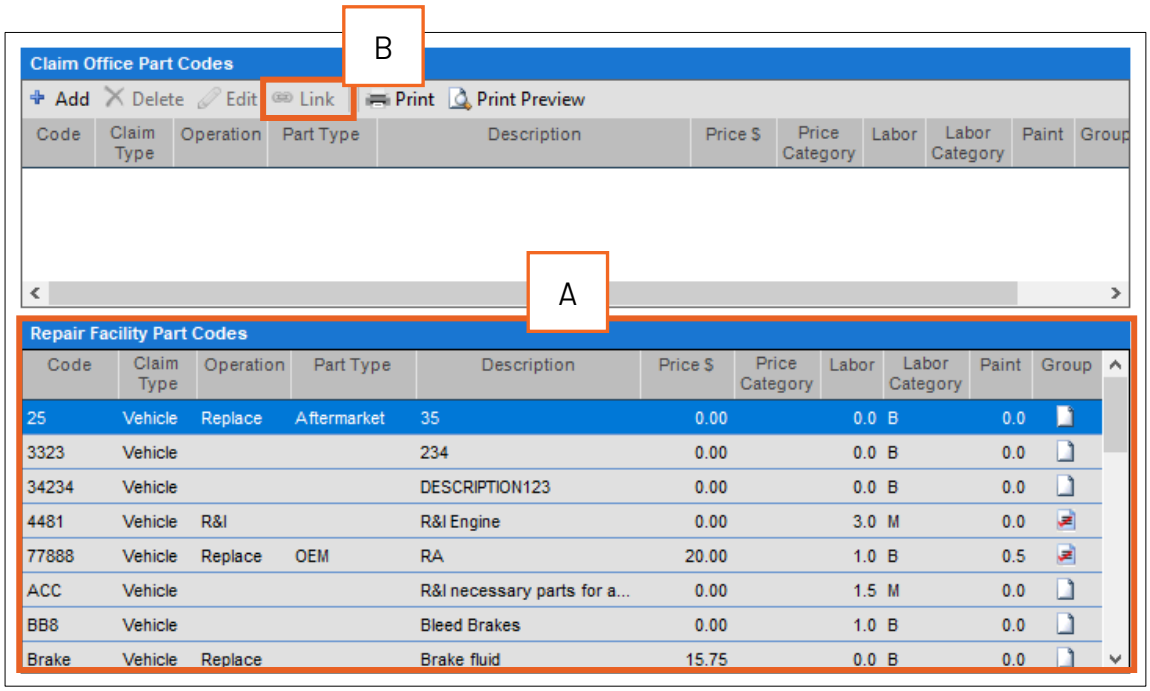
### Other Charges

This section allows you to add **Other Charges** categories using the (A) **Add** button and update the pricing for the standard charges such as **Towing**, **Storage**, and **EPC** (Environmental Protection Change) using the (B) **Edit** button.




### Part Codes

This section allows you to set up part codes specific to this claim office. You can also link existing repair facility codes to the codes listed in the (A) **Repair Facility Part Codes** section. Select the (B) **Link** button to link an insurer's part code to your own part code. This is done when an insurer wants to see a frequently used part code listed in a specific way that is different from your own part code.

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**Estimating,** continued

This section covers the **Estimating** section on the Profile Settings in the estimating application.

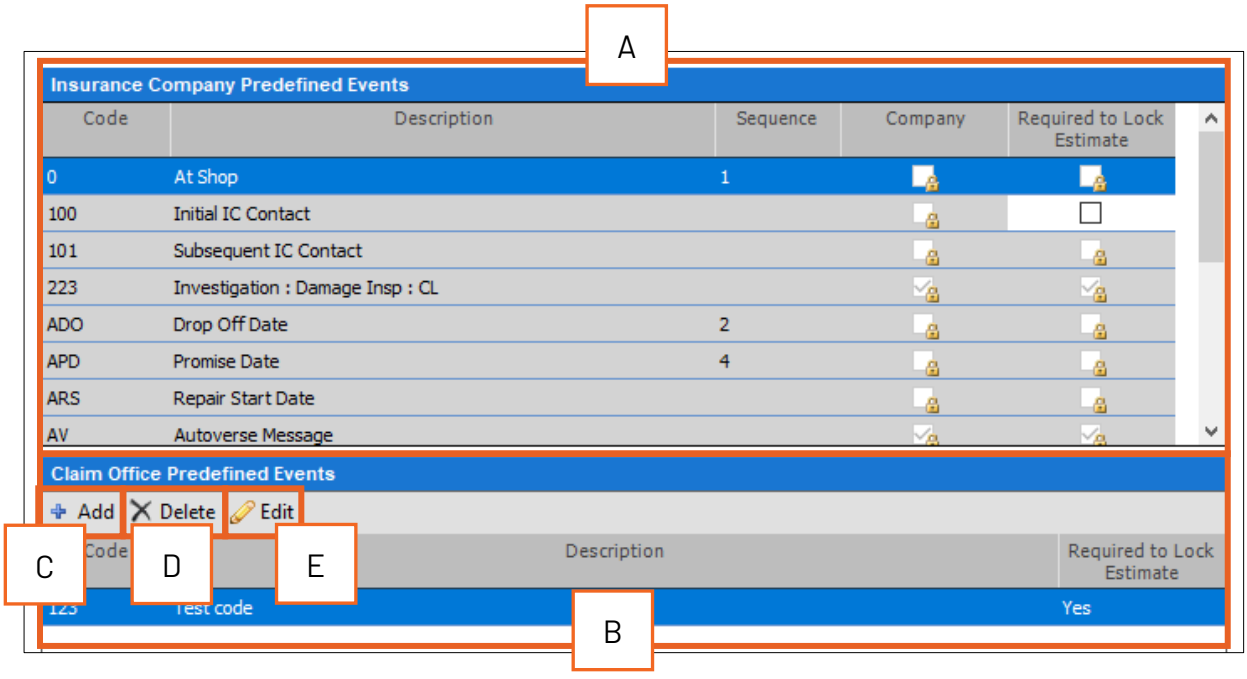
### Predefined Events

This section allows you to view the (A) **Insurance Company Predefined Events** from the company level profile.

**Note:** These events may or may not be communicated when saved to an estimate depending on the insurance company settings.

To add (B) **Claim Office Predefined Events** specific for this claim office select (C) **Add**, and enter the Predefined Event information. Use the (D) **Delete** and (E) **Edit** buttons to delete or edit Predefined events.

**Note:** Claim office specific events do not have a communicate option. Events can only be marked **Yes** or **No** to be flagged as **Required to Lock Estimate**.

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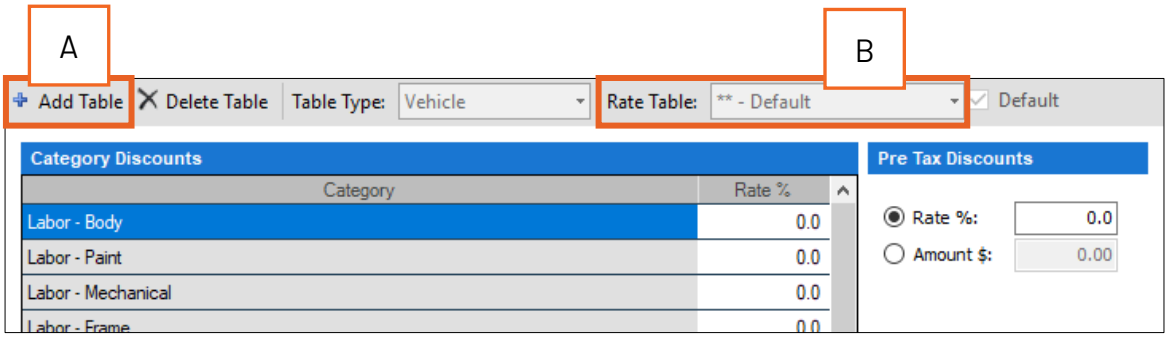
**Rates**

This section covers the **Rates** section on the Profile Settings in the estimating application.

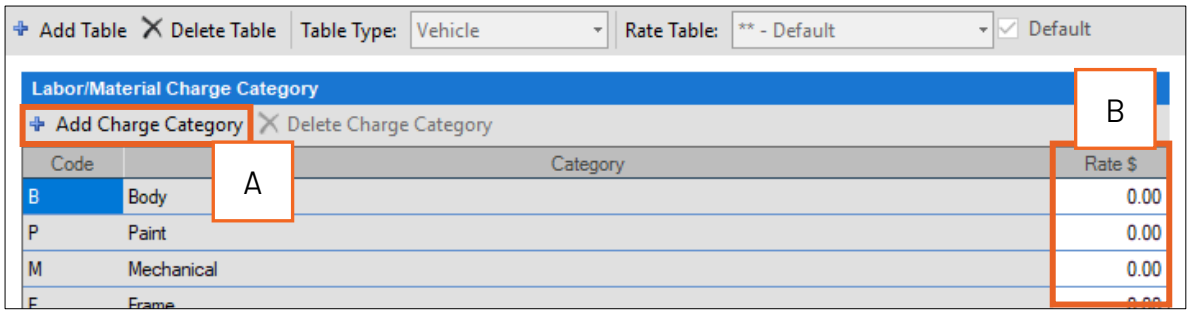
### Discount

This section of the rates table lets you edit pretax discounts and discounts by rate category. Click (A) **Add Table** to add new rate tables or edit the default table. Ensure the appropriate (B) **Rate Table** you would like to edit is selected before making changes.



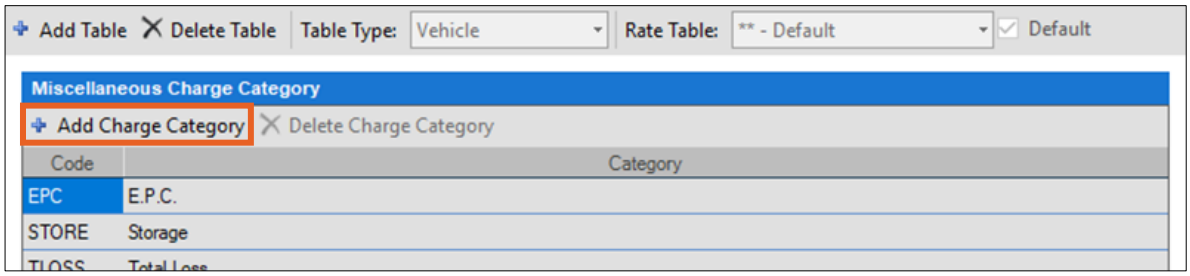

### Labor

This section of the rates table allows you to enter labor rates for each labor and material category. Click (A) **Add Charge Category** to add a new charge category. The (B) taxability can also be defined for each category in the **Rates $** column.




### Miscellaneous

This section of the rates table allows you to enter Miscellaneous charge categories. Click **Add Charge Category** to add new other charge categories that are not suited for the default Part and Labor categories.

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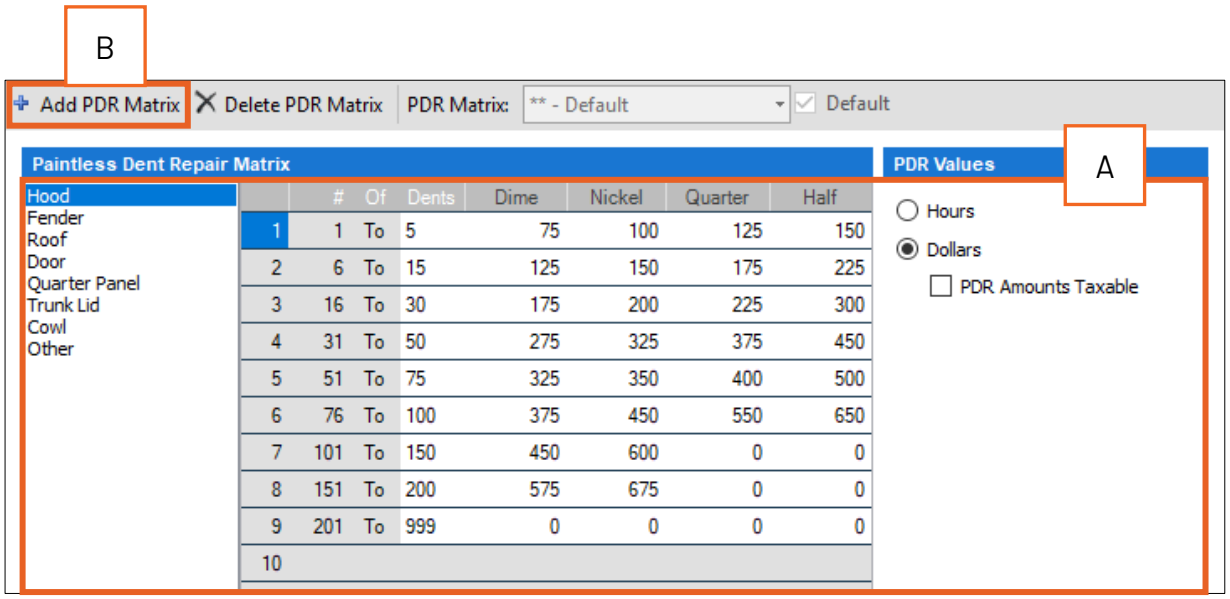
**Rates,** continued

This section covers the **Rates** section on the Profile Settings in the estimating application.

### Paintless Dent Repair (PDR) Matrix

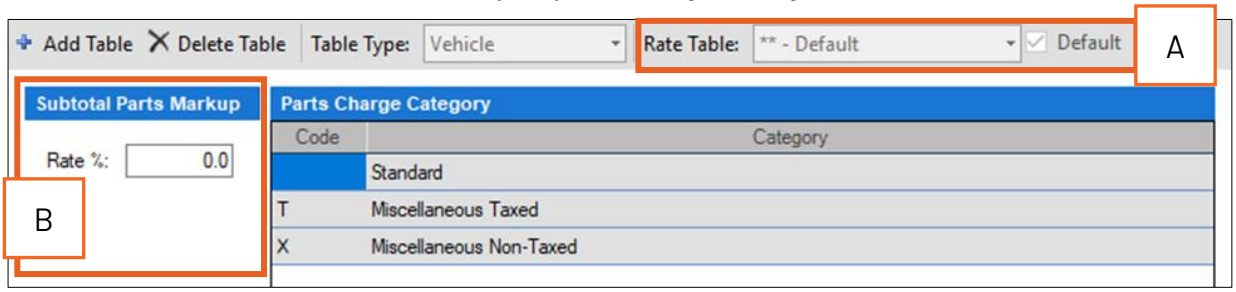
This section of the rates table displays the default Paintless Dent Repair Matrix. Update the (A) **default** or create new PDR matrixes as needed using the (B) **Add PDR Matrix** button. If more than one PDR Matrixes exist set one to the default.




| | # | Of | Dents | Dime | Nickel | Quarter | Half |
|---|---|---|---|---|---|---|---|
| 1 | 1 | To | 5 | 75 | 100 | 125 | 150 |
| 2 | 6 | To | 15 | 125 | 150 | 175 | 225 |
| 3 | 16 | To | 30 | 175 | 200 | 225 | 300 |
| 4 | 31 | To | 50 | 275 | 325 | 375 | 450 |
| 5 | 51 | To | 75 | 325 | 350 | 400 | 500 |
| 6 | 76 | To | 100 | 375 | 450 | 550 | 650 |
| 7 | 101 | To | 150 | 450 | 600 | 0 | 0 |
| 8 | 151 | To | 200 | 575 | 675 | 0 | 0 |
| 9 | 201 | To | 999 | 0 | 0 | 0 | 0 |
| 10 | | | | | | | |

### Parts

This section displays Part Charge categories for the selected (A) **Rate Table**. The (B) **Subtotal Parts Markup** and taxability of part change categories can also be defined.

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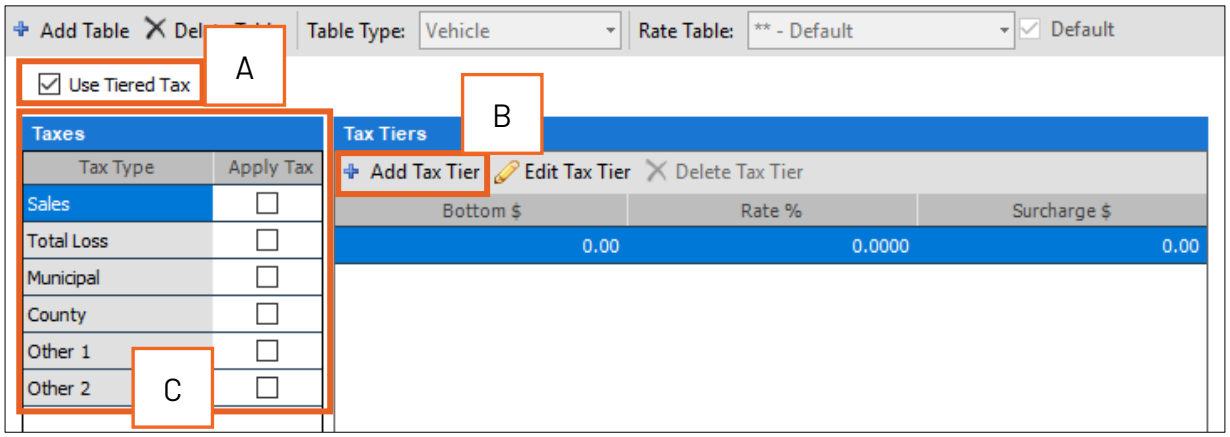
**Rates,** continued

This section covers the **Rates** section on the Profile Settings in the estimating application.

### Taxes

This section displays the tax rates within the selected rate table. If Tiered Taxes applies, check the box to (A) **Use Tiered Tax** and define your tax tiers by selecting the (B) **Add Tax Tier** button and enter the requested information. If Tiered Tax doesn't apply, uncheck the box and define individual (C) **Tax Type** rates.

**Note:** If prompted, to update these rates, please edit the tax rates for the default rate table in the repair facility profile.

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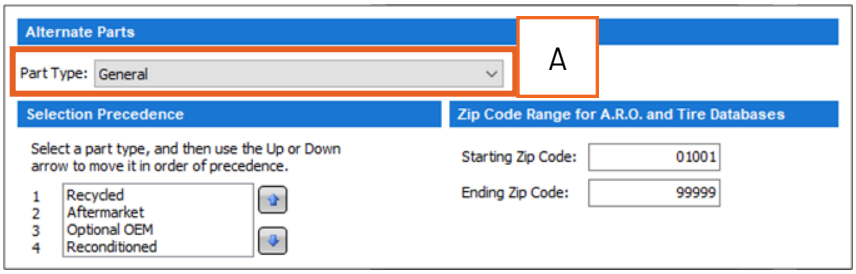
**Rules** This section covers the **Rules** section on the Profile Settings in the estimating application.

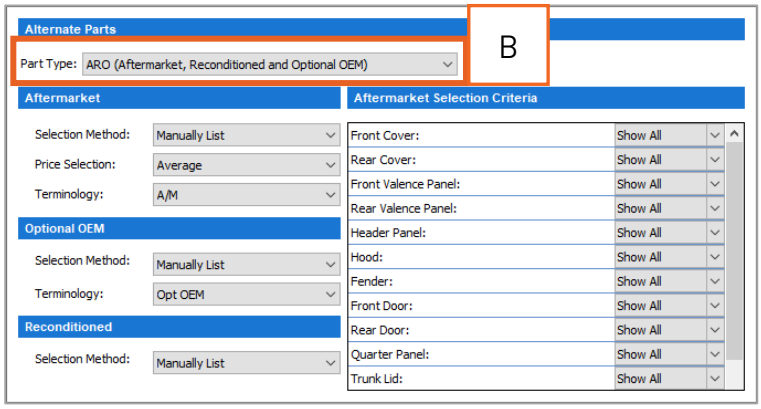
### Alternative Parts

This section displays the Alternative Parts options. Select one of the following **Part Type** options and then define specific settings:

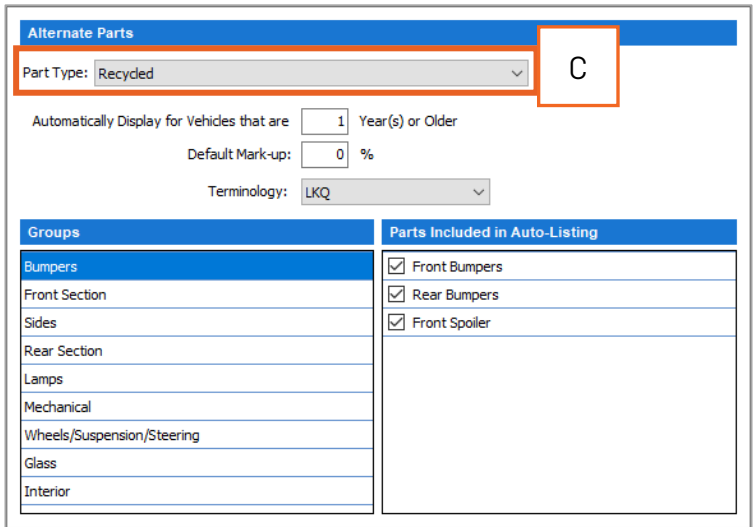
**General** (A) options:
- Define the precedence order for each part type.
- Select a **Zip Code Range** to narrow your results.




**ARO (Aftermarket, Reconditioned, Optional OEM)** (B) options:
- **Selection Methods** options:
  - Automatically Select, Automatically List and Manually List.
- **Price Selection** options:
  - Lowest and Average.
- Select a **Terminology** option.
- **AM Selection Criteria** options:
  - Show All, Show CAPA, Show None.




**Recycled** (C) options:
- Enter an **Automatically Display for Vehicles that are __ Year(s) or Older** year.
- Enter a **Default Mark-Up %** value.
- Select a **Terminology** option.
- Select/Deselect available **Parts Included in Auto-Listing** based on the **Groups** selected.

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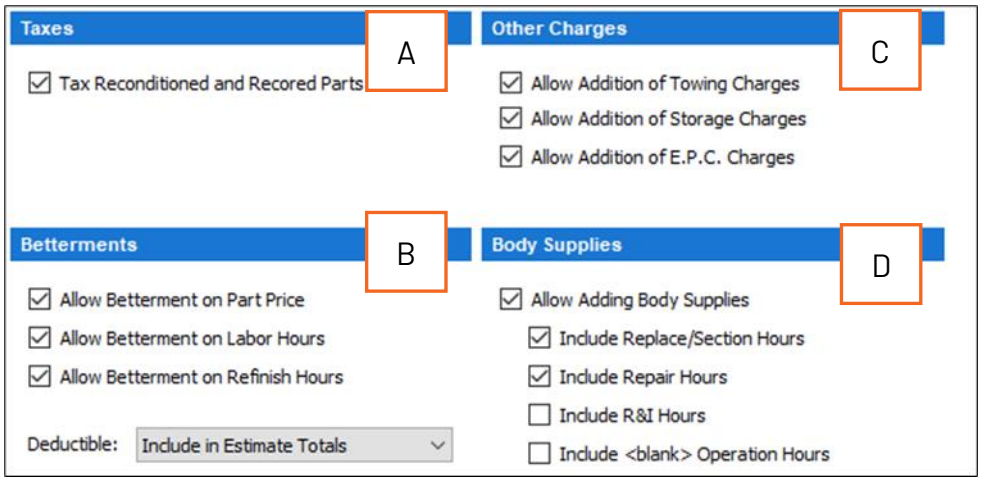
**Rules,** continued

This section covers the **Rules** section on the Profile Settings in the estimating application.

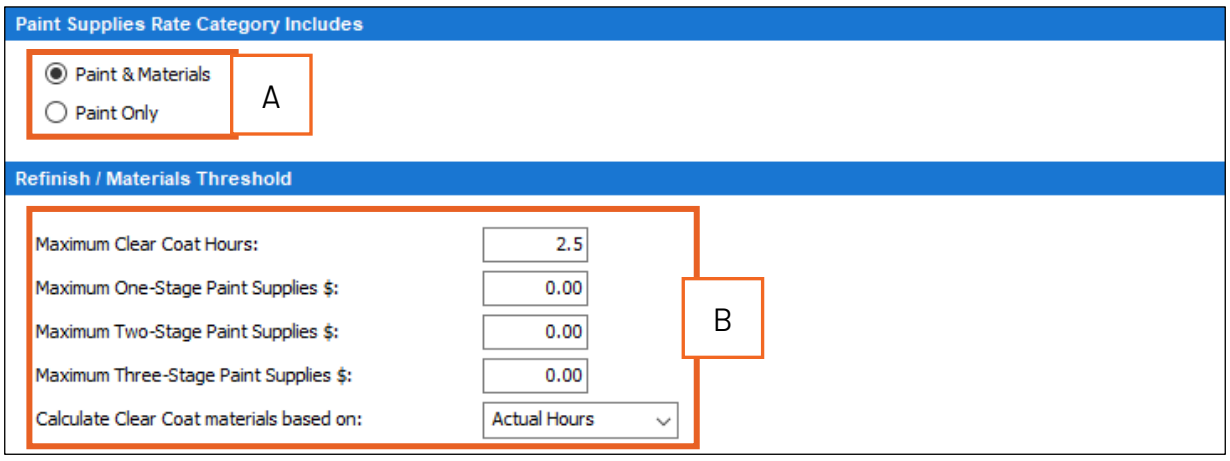
### Miscellaneous

The Miscellaneous rule section allows you to set up rules for applying taxes to (A) **Tax Reconditioned and Recorded Parts**, allowing (B) **Betterments** including deductibles, (C) **Other Changes**, and (D) **Allowing Adding Body Supplies** for body supplies on certain operations.




### Refinish

The refinish rules section allows you to add additional minimums to (A) Paint and/or Materials. (B) Designate how clear coat and clear coat materials are calculated.

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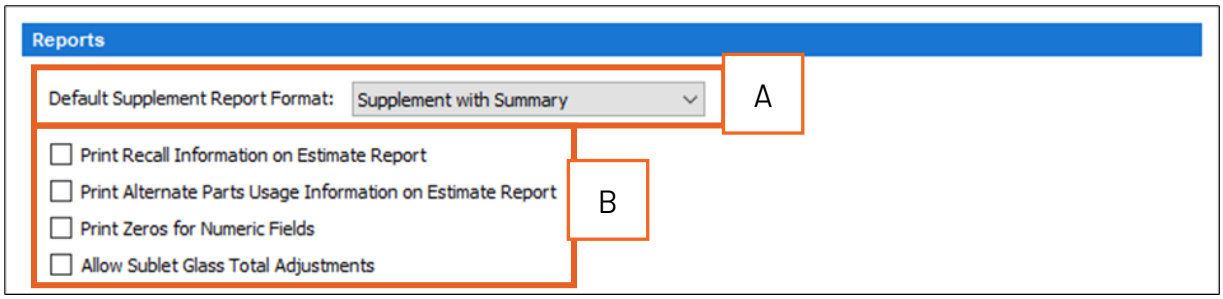
**Rules,** continued

This section covers the **Rules** section on the Profile Settings in the estimating application.

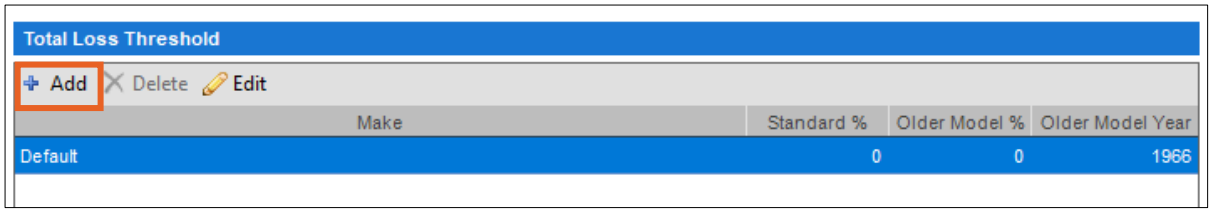
### Reports

The reports section allows you to setup how your estimate and supplement reports will print. Use the (A) **Default Supplement Report Format** dropdown and (B) **checkboxes** to select which items can print on a report.




### Total Loss Threshold

The Total Loss Threshold section allows you to define claim office specific Total Loss Thresholds for a selected Vehicle Make. Use the **Add** button to add vehicle thresholds to the list.

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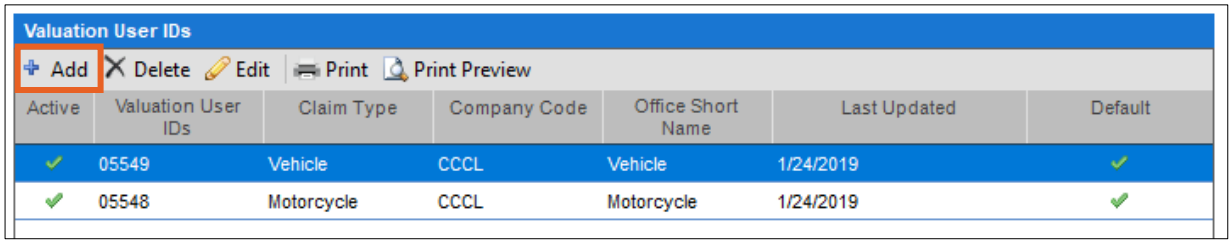
**Valuation User ID**

This section covers the Valuation User ID section on the Profile Settings in the estimating application.

The Valuation User ID section allows you add a Valuation User ID for an Insurer and Claim Office by selecting the **Add** button.




**Workfile Rules**

This section covers the Workfile Rules section on the Profile Settings in the estimating application.

The Workfile rules section determines if you can send back a workfile without an assignment associated with it.

**Note:** This is set by the insurance company and cannot be edited.

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