

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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Profile Overview, Continued

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.

The screenshot shows the 'Profile Settings' window for 'CCC1-IC1 TEST COMPANY-01 - ABC321'. The left sidebar contains a tree view with categories like 'Basic Settings', 'Company Information', 'Estimating', 'Rules', and 'Workfile Rules'. The 'Company Information' section is expanded, showing 'Office' and 'Address' sub-sections. The 'Office' section (labeled A) includes fields for Company, Office Code, Office Name, Unit, Federal ID#, and CCC Location ID, along with a 'Get ID' button. The 'Address' section (labeled B) includes fields for Address 1, Address 2, City/State/Zip, and Phone Number(s) (with a table for Phone Type and Phone Number), and a Contact field.

Phone Type	Phone Number

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Profile Overview, Continued

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 Reports				
Disclaimer Type	Preliminary Estimate/Supplement	Locked Estimate/Supplement	Unrelated Prior Damage	Related Prior Damage
General	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alternate Parts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Disclaimer Sources

Primary Source for State Disclaimer: Vehicle Owner State

Secondary Source for State Disclaimer: Repair Facility State

Print on External Assignment Only

General Disclaimer

Alternate Parts Disclaimer

Disclaimer – Text

This section allows you to View or Edit disclaimer text that appears in Estimate Reports.

Note: Only **General** and **Alternate Part** disclaimer text can be edited.

Disclaimer Text

Type: General

Disclaimer:

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Profile Overview, Continued

Estimating, This section covers the **Estimating** section on the Profile Settings in the continued 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 Charge) using the (B) **Edit** button.

Other Charges		
Description	Price \$	Category
Towing	0.00	TOWNG
Storage	0.00	STORE
E.P.C.	0.00	EPC

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.

Claim Office Part Codes										
Code	Claim Type	Operation	Part Type	Description	Price \$	Price Category	Labor	Labor Category	Paint	Group

Repair Facility Part Codes										
Code	Claim Type	Operation	Part Type	Description	Price \$	Price Category	Labor	Labor Category	Paint	Group
25	Vehicle	Replace	Aftermarket	35	0.00		0.0	B	0.0	
3323	Vehicle			234	0.00		0.0	B	0.0	
34234	Vehicle			DESCRIPTION123	0.00		0.0	B	0.0	
4481	Vehicle	R&I		R&I Engine	0.00		3.0	M	0.0	
77888	Vehicle	Replace	OEM	RA	20.00		1.0	B	0.5	
ACC	Vehicle			R&I necessary parts for a...	0.00		1.5	M	0.0	
BB8	Vehicle			Bleed Brakes	0.00		1.0	B	0.0	
Brake	Vehicle	Replace		Brake fluid	15.75		0.0	B	0.0	

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Profile Overview, Continued

Estimating, This section covers the **Estimating** section on the Profile Settings in the continued 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**.

The screenshot displays two sections: 'Insurance Company Predefined Events' and 'Claim Office Predefined Events'. The top section is a table with columns for Code, Description, Sequence, Company, and Required to Lock Estimate. The bottom section includes 'Add', 'Delete', and 'Edit' buttons, followed by a table with columns for Code, Description, and Required to Lock Estimate. Callouts A through E highlight specific elements: A points to the 'Insurance Company Predefined Events' header; B points to the 'Claim Office Predefined Events' table; C points to the 'Add' button; D points to the 'Delete' button; and E points to the 'Edit' button.

Code	Description	Sequence	Company	Required to Lock Estimate
0	At Shop	1	<input type="checkbox"/>	<input type="checkbox"/>
100	Initial IC Contact		<input type="checkbox"/>	<input type="checkbox"/>
101	Subsequent IC Contact		<input type="checkbox"/>	<input type="checkbox"/>
223	Investigation : Damage Insp : CL		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
ADO	Drop Off Date	2	<input type="checkbox"/>	<input type="checkbox"/>
APD	Promise Date	4	<input type="checkbox"/>	<input type="checkbox"/>
ARS	Repair Start Date		<input type="checkbox"/>	<input type="checkbox"/>
AV	Autoverse Message		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Code	Description	Required to Lock Estimate
125	test code	Yes

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Profile Overview, Continued

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.

The screenshot shows the 'Rates' section with two main panels: 'Category Discounts' and 'Pre Tax Discounts'. The 'Category Discounts' panel contains a table with the following data:

Category	Rate %
Labor - Body	0.0
Labor - Paint	0.0
Labor - Mechanical	0.0
Labor - Frame	0.0

The 'Pre Tax Discounts' panel has two radio buttons: 'Rate %' (selected) with a value of 0.0, and 'Amount \$' with a value of 0.00. Callout A points to the '+ Add Table' button, and callout B points to the 'Rate Table: ** - Default' dropdown menu.

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.

The screenshot shows the 'Labor/Material Charge Category' section with a table containing the following data:

Code	Category	Rate \$
B	Body	0.00
P	Paint	0.00
M	Mechanical	0.00
F	Frame	0.00

Callout A points to the '+ Add Charge Category' button, and callout B points to the 'Rate \$' 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.

The screenshot shows the 'Miscellaneous Charge Category' section with a table containing the following data:

Code	Category
EPC	E.P.C.
STORE	Storage
TLOSS	Total Loss

Callout A points to the '+ Add Charge Category' button.

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Profile Overview, Continued

Rates, This section covers the **Rates** section on the Profile Settings in the continued 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.

B
+ Add PDR Matrix
✖ Delete PDR Matrix
PDR Matrix: ** - Default
 Default

Paintless Dent Repair Matrix								PDR Values	
		#	Of	Dents	Dime	Nickel	Quarter	Half	
Hood		1	To	5	75	100	125	150	<input type="radio"/> Hours
Fender		1	To	5	75	100	125	150	<input checked="" type="radio"/> Dollars
Roof		2	To	15	125	150	175	225	<input type="checkbox"/> PDR Amounts Taxable
Door		2	To	15	125	150	175	225	
Quarter Panel		3	To	30	175	200	225	300	
Trunk Lid		3	To	30	175	200	225	300	
Cowl		4	To	50	275	325	375	450	
Other		4	To	50	275	325	375	450	
		5	To	75	325	350	400	500	
		6	To	100	375	450	550	650	
		7	To	150	450	600	0	0	
		8	To	200	575	675	0	0	
		9	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 charge categories can also be defined.

+ Add Table
✖ Delete Table
Table Type: Vehicle
Rate Table: ** - Default
 Default
A

Subtotal Parts Markup

Rate %:

Parts Charge Category

Code	Category
	Standard
T	Miscellaneous Taxed
X	Miscellaneous Non-Taxed

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Profile Overview, Continued

Rates, This section covers the **Rates** section on the Profile Settings in the
continued 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.

The screenshot shows the 'Profile Settings' interface for a 'Vehicle' rate table. At the top, there are controls for 'Add Table', 'Delete Table', 'Table Type: Vehicle', 'Rate Table: ** - Default', and a 'Default' checkbox. Below this, there are two main sections: 'Taxes' and 'Tax Tiers'. In the 'Taxes' section, there is a checkbox labeled 'A' for 'Use Tiered Tax' which is checked. Below it is a table with columns 'Tax Type' and 'Apply Tax'. The rows are 'Sales', 'Total Loss', 'Municipal', 'County', 'Other 1', and 'Other 2'. The 'Other 2' row is highlighted and labeled 'C'. In the 'Tax Tiers' section, there is a button labeled 'B' for 'Add Tax Tier', along with 'Edit Tax Tier' and 'Delete Tax Tier' buttons. Below these buttons is a table with columns 'Bottom \$', 'Rate %', and 'Surcharge \$'. The table contains one row with values '0.00', '0.0000', and '0.00'.

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Profile Overview, Continued

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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Profile Overview, Continued

Rules, This section covers the **Rules** section on the Profile Settings in the continued 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 Charges**, and (D) **Allowing Adding Body Supplies** for body supplies on certain operations.

Taxes	Other Charges
<input checked="" type="checkbox"/> Tax Reconditioned and Recorded Parts	<input checked="" type="checkbox"/> Allow Addition of Towing Charges
	<input checked="" type="checkbox"/> Allow Addition of Storage Charges
	<input checked="" type="checkbox"/> Allow Addition of E.P.C. Charges
Betterments	Body Supplies
<input checked="" type="checkbox"/> Allow Betterment on Part Price	<input checked="" type="checkbox"/> Allow Adding Body Supplies
<input checked="" type="checkbox"/> Allow Betterment on Labor Hours	<input checked="" type="checkbox"/> Include Replace/Section Hours
<input checked="" type="checkbox"/> Allow Betterment on Refinish Hours	<input checked="" type="checkbox"/> Include Repair Hours
Deductible: <input type="text" value="Include in Estimate Totals"/>	<input type="checkbox"/> Include R&I Hours
	<input type="checkbox"/> Include <blank> Operation Hours

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.

Paint Supplies Rate Category Includes	
<input checked="" type="radio"/> Paint & Materials	A
<input type="radio"/> Paint Only	
Refinish / Materials Threshold	
Maximum Clear Coat Hours:	<input type="text" value="2.5"/>
Maximum One-Stage Paint Supplies \$:	<input type="text" value="0.00"/>
Maximum Two-Stage Paint Supplies \$:	<input type="text" value="0.00"/>
Maximum Three-Stage Paint Supplies \$:	<input type="text" value="0.00"/>
Calculate Clear Coat materials based on:	<input type="text" value="Actual Hours"/>

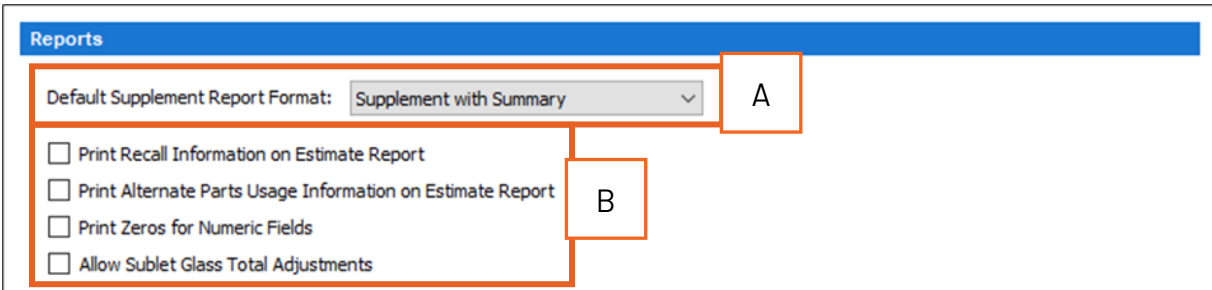
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Profile Overview, Continued

Rules, This section covers the **Rules** section on the Profile Settings in the
continued 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.



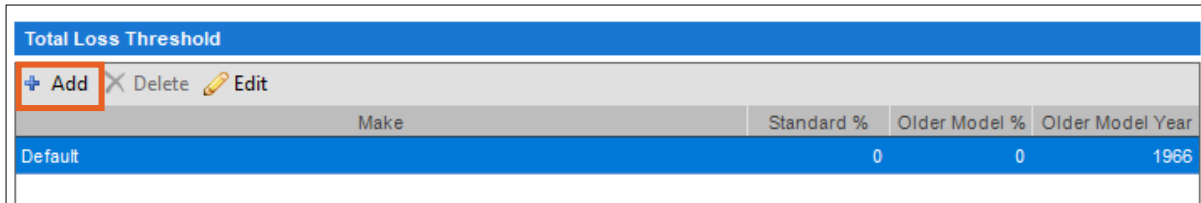
Reports

Default Supplement Report Format: Supplement with Summary (A)

- Print Recall Information on Estimate Report
- Print Alternate Parts Usage Information on Estimate Report (B)
- Print Zeros for Numeric Fields
- Allow Sublet Glass Total Adjustments

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.



Total Loss Threshold

+ Add Delete Edit

Make	Standard %	Older Model %	Older Model Year
Default	0	0	1966

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Profile Overview, Continued

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.

Valuation User IDs						
+ Add X Delete Edit Print Print Preview						
Active	Valuation User IDs	Claim Type	Company Code	Office Short Name	Last Updated	Default
✓	05549	Vehicle	CCCL	Vehicle	1/24/2019	✓
✓	05548	Motorcycle	CCCL	Motorcycle	1/24/2019	✓

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.

Workfile Rules
<input type="checkbox"/> Allow Workfiles to be Sent Without Assignment