

CCC® Estimating: Repair Workflow – Repair Plan Sync

Overview

Repair Plan Sync is an optional feature within the CCC Repair Workflow settings that will automatically complete related events on the Events tab as the repair facility meets milestones on the Repair Plan tab of the workfile.

This job aid will cover how to use the Repair Facility Profile to enable Sync for all insurance companies or a specific insurance company.

Repair Workflow Customers

Sync will automatically add events to workfiles based on the setup of the insurance company in the RF profile.

Insurance companies may require event tracking, such as Vehicle In, Repair Started, etc. This is done when a repair workflow customer completes a phase in the Repair Plan. If syncing is enabled, CCC will automatically generate the matching required insurance company event to the Events tab.

Additional Events

Complete Additional Events (Final Bill, etc.) manually with Sync enabled for the insurance company.

For example, if the company has a Final Bill event, that event will still need to be added manually. If the auto-adding of events is not functioning correctly, add the event manually.

Voiding Events

Automatically generated events cannot be directly voided from the Events tab of the workfile when event syncing is enabled.

An automatically generated event may be marked Void by an incomplete phase on the Repair Plan tab of the workfile.

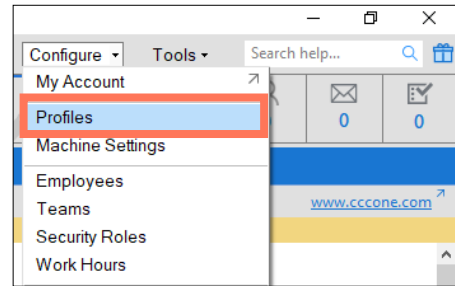
To re-enter this event with new information, select a new date for the phase and complete the repair plan milestone.

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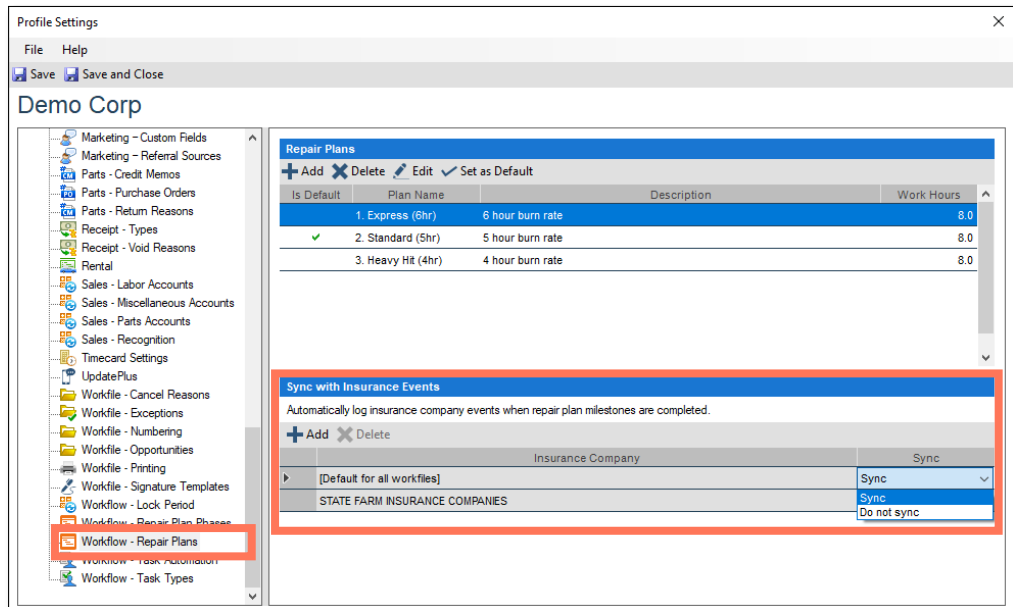
Turn on the Sync setting for insurance companies

Step	Action
1	Open the Repair Facility profile.
2	Go to Configure - Profiles - Repair Facility profile.
3	On the left column, scroll toward the bottom.
4	Under the Repair Management section, select Workflow Repair Plans and update your Sync setting on the right.



Update the Sync settings for specific insurance companies

Step	Action
1	Find or Add the insurance company in the list and toggle the Sync drop-down to Do not sync .
2	Save and close the profile.
3	Close and reopen workfile.



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Contact Us

Please feel free to contact us with additional questions:

Technical Support:	<ul style="list-style-type: none">• (800) 637-8511• tsemailsupport@cccis.com
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