

CCC ONE® UpdatePlus Notification Alerts

Introduction

Previously, in the CCC ONE® UpdatePlus Portal, you could set up to receive email alerts to notify you when certain events such as the Promise Date being missing or a Hotsheet was received from a customer. This functionality is now available in CCC ONE® Estimating and CCC ONE® Repair Workflow. The email alerts will be sent to the email listed on the Employee Profile. This job aid shows you the requirements for and how to configure UpdatePlus Alerts for your account.

Email Required

When UpdatePlus is enabled, all Estimators must have their email address listed on the **Configure > Employees > Employee** tab as shown below. This will allow the user to receive the selected email Alerts.

The screenshot shows the 'Test Employee - Employee' form in a web browser. The form is divided into several sections:

- Employee Information:** First Name (Test), Last Name (Employee), Display Name (Test Employee), Address 1 (1234 Test Lane), Address 2, City/State/Zip (Gulf Shores, AL, 36542-____), Active (checked), Estimator (unchecked).
- Phone Numbers:** A table with columns 'Phone Type' and 'Phone Number'. One entry is 'Cell' with number '(555) 555-5555'. There is a 'Click here to add' button.
- Locations:** Home Location (CCC-LSG LOCATION 1), Available Locations (CCC-LSG LOCATION 2), Assigned Locations (CCC-LSG LOCATION 1).
- Emergency Contact:** Name (Test Contact), Relationship (Spouse), Phone Numbers (Cell, (555) 555-5555).
- Additional Info:** Primary E-mail (testemployee@fakeemail.com), Date of Birth (06/22/1975), Gender (Male), Employee ID (123456), Hire Date (02/24/2018), Estimator License Number (12345), Termination Date, Custom Date, Custom Field 1, Custom Field 2.

Note: Adding a new Employee or editing an existing Employee without adding an email address will cause a validation error to display.

Requirements

In order to set up email Alerts, UpdatePlus must be enabled for your CCC ONE License. You must also be logged in as an Estimator OR have the security permission to receive email Alerts on all workfiles (see last section).

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My Account

Select UpdatePlus Alert settings by going to Configure > My Account. You will see a new section called UpdatePlus Alerts at the bottom of the My Account window. For each Alert type, you can choose whether or not to receive email alerts for that item. The options available for each Alert depend on your security permissions.

Estimators can select:

- No alerts
- Alerts for my workfiles only
- Alerts for all workfiles.

Users with permission to receive alerts on all workfiles:

- No alerts
- Alerts for my workfiles only
- Alerts for all workfiles.

Make your selections and then click **SAVE**.

UPDATEPLUS ALERTS	
Promise date missing	<input type="text" value="No alerts"/>
Promise date about to expire	<input type="text" value="No alerts"/>
Negative post delivery survey response	<input type="text" value="No alerts"/>
Hotsheet received	<input type="text" value="No alerts"/>
Request for service recovery	<input type="text" value="No alerts"/>

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Security Permissions

You must be logged in as an Estimator to set alerts. All non-Estimators must have the new security permission to receive email Alerts or to receive Alerts from all workfiles in all Locations that they are allowed access. These users do NOT have to be the assigned Estimator on the workfile.

The screenshot shows a window titled "Admin User - Role" with a close button in the top right corner. It has two tabs: "Role" (selected) and "Users (1)".

Under the "Role" tab, there are two text input fields: "Name:" containing "Admin User" and "Description:" which is empty. Below these is a section titled "Select user permissions for this role from the list below:" followed by a list of permissions, each with a checked checkbox:

- Profiles - Create claim office profile from assignment
- Profiles - Edit claim office profiles
- Profiles - Edit repair facility profiles
- Profiles - Edit repairer profiles
- Profiles - Manage taxes at the company level from cccone.com
- Profiles - Search and view (read-only) profiles
- Security Roles - Create, search, view, edit, and delete security roles
- Tablet - Allow access to CCC ONE Tablet
- Tasks - Manage tasks created by or assigned to others
- UpdatePlus - Provide the ability to receive alerts for all workfiles
- Workfiles - Reopen a closed workfile
- Workfiles - Search and view (read-only) workfiles
- Reporting
 - Customer - View customer reports
 - Estimating Reports - View estimating reports

At the bottom right of the window are "OK" and "Cancel" buttons.

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Service Recovery Form

Based on the permissions added above, the Estimator can now receive the notification that a Hotsheet was received. However, in order to complete a Hotsheet, there is one last security permission that must be added: **Complete service recovery on hotsheets**.

To do this, go to the Admin User security role (or whatever role the Estimators have that you want to update) by selecting **Configure > Security Roles**. Select the **Admin User** role.

Go to the **Core** section and check the box for **Customer Communication - Complete service recovery on hotsheets**.

Click **OK** and make sure to save the changes.

Admin User - Role

Role Users (1)

Name: Admin User

Description:

Select user permissions for this role from the list below:

- Core
 - Bulletins - Manage insurance bulletins
 - Central Review Dashboard - Manage estimates routed for central review
 - Correspondence - Create, view, and print correspondence
 - Customer Communication - Complete service recovery on hotsheets
 - Customer Communication - Send custom text and email replies
 - Customer Communication - Send responses to customer surveys
 - Customer Contacts - Create, search, view, edit, merge, and delete customer contacts
 - Customer Contacts - Search and view (read-only) customer contacts
 - Customer Experience Dashboard - Manage customer communications on workfiles
 - Diagnostics - Perform diagnostic scans
 - Employees - Create, edit, and deactivate user login accounts
 - Profiles - Edit repairer profiles
 - Profiles - Manage taxes at the company level from cccone.com

OK Cancel