Desktop Shopping Vendor Setup & Usage

Introduction

Desktop Shopping is the ability to order and purchase parts from within CCC® Estimating and CCC® Repair Workflow. Users can set up both manual and electronic vendors, receive live quotes, and, for some vendors, receive promotional codes for specific parts. Users can place those electronic orders while writing the estimate.

Note: Feature differences between Estimating and Repair Workflow will be identified where appropriate.

This document includes a series of job aids that provide information on the following:

- Action Center
- Vendor setup for Electronic Parts Ordering
- Live Quotes
- Placing Electronic Orders
- Viewing Parts Ordered Electronically

Contents

You first need to add/activate a vendor. Please refer to the **Action Center Vendor Configuration** job aid to add vendors that are waiting to be set up. You will then be able to set up the vendor (that you have added) for electronic parts ordering.

Vendor Setup for Electronic Parts Ordering

Introduction   Live parts pricing allows you to get real time quotes for parts and order those parts electronically while writing an estimate in CCC® Estimating or Repair Workflow. First, you must configure your system with preferred vendors to use electronic parts ordering.
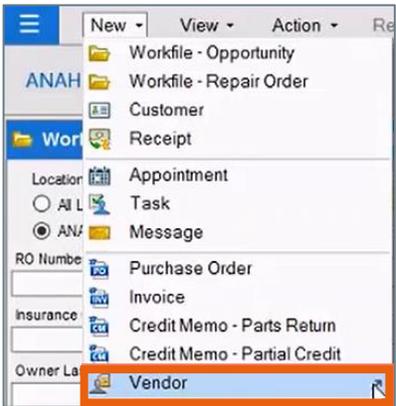
Vendor Configuration   Follow the steps below to configure electronic vendors:

Step	Action
1	Log in with your username and password.
2	Select **View > Vendors** or select **New > Vendor**.
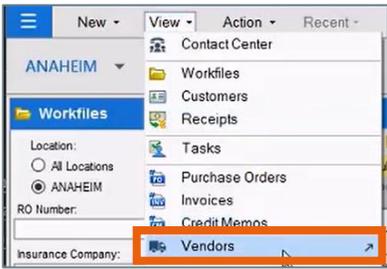
Estimating   **Repair Workflow**

Note: The Arrow next to Vendors/Vendor indicates that the system will navigate to the cccone.com web client when clicked.
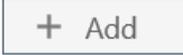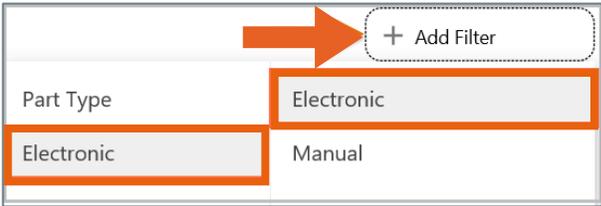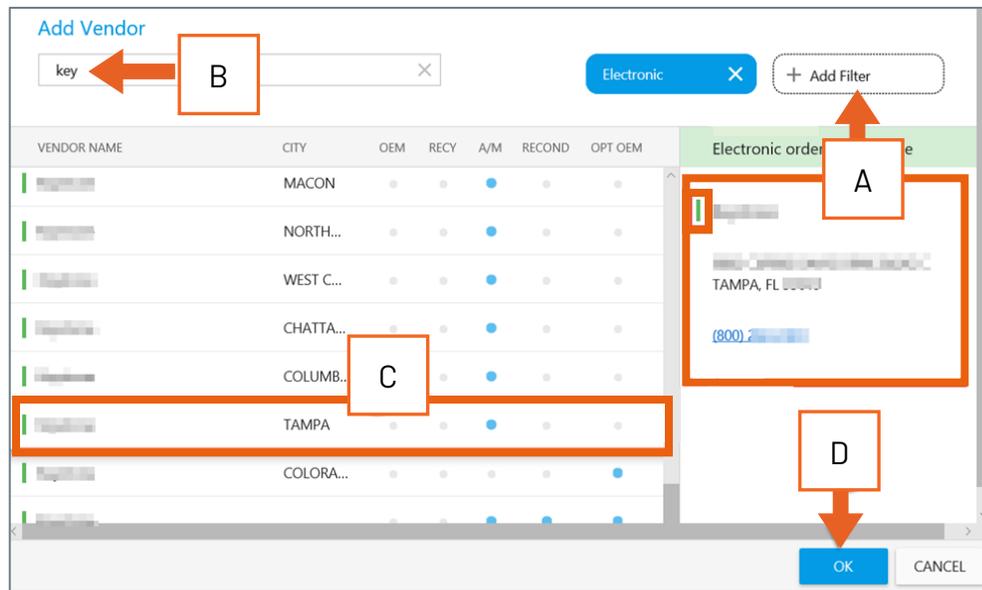
Only Repair Workflow has Preferred Vendors.

Vendor Configuration, continued

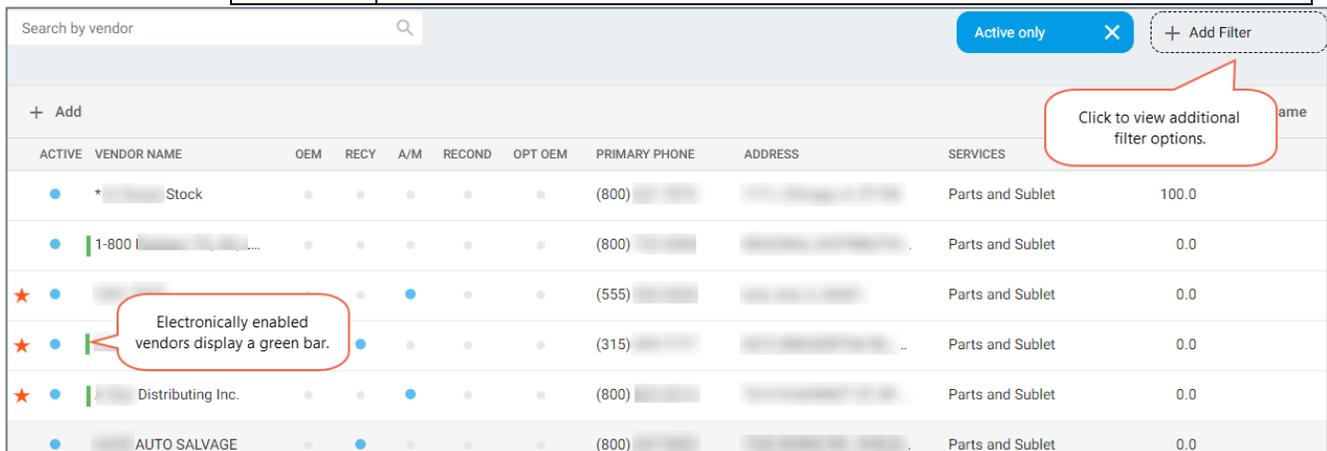| Step	Action
3	When the webpage displays, click **Add**. 　＋　Add
4	In the **Add Vendor** page that displays: 　A. Click **Add Filter.** Select **Electronic** to filter search results for electronic vendors. Select **Part Type** to filter by type. 　　The filter that you have added displays. 　 　B. In the **Search Vendor** field, enter the name of the vendor. 　　A list of electronic vendors matching the vendor's name you entered displays. A **green** bar displays next to the name of all vendors that fit your criteria that are enabled for electronic parts ordering. 　C. Select the **Vendor** from the list. The Vendor details display on the right. 　D. Click **OK**. (Edit the Vendor, if needed, on next screen.)

Vendor Configuration, continued

Step	Action
5	The **Vendors** page will now display the vendor you have added. The following information is displayed for each vendor: • **Vendor:** Name and address of the vendor. • **Part Type:** Part types the electronic vendor supplies – OEM, Recycled, Aftermarket, Reconditioned, and Optional OEM.

Editing and Viewing Vendor Details

	Note: You can also click the vendor to view two buttons on this page: ✏️ Edit ⊖ Deactivate
	Edit — Click to access the Vendor page.
	Deactivate — Click to deactivate the vendor. The deactivated vendor will display in the Inactive vendor page.

Vendor Configuration, continued

Step	Action
6	The **Vendor Details** page displays listing all information that used to be a part of vendor profile in the Estimating client.

Scroll down to view options that are displayed for selected vendor:

General	Displays general information.
Services	Services the selected vendor provides.
Preferred Vendor	Displays only if Parts and Sublets service is selected. To indicate it as a preferred vendor for Repair Workflow, click the **Configure Preferred Vendor Settings** link and click **Yes**. If multiple locations, you will see locations to configure.
Part Types	Displays only if Parts and Sublets service is selected.
Vehicle Makes	Parts for Vehicle make the selected vendor supplies.
Orders	Displays discounts, expected delivery, default payment type, etc.
Notifications	Displays email address entered for notifications.
Contacts	Contact information.
Notes	Enter comments as needed.

To modify any of these options, select the option you need and then click **Save**.

Note: Two tabs display, Vendor and Locations. The Locations tab will display if the selected vendor is part of an MSO. Click this tab to configure vendor for multiple locations.

Vendor Setup for Electronic Parts Ordering, Continued

Disabling Electronic Ordering

You can disable electronic ordering on any electronic enabled vendor.

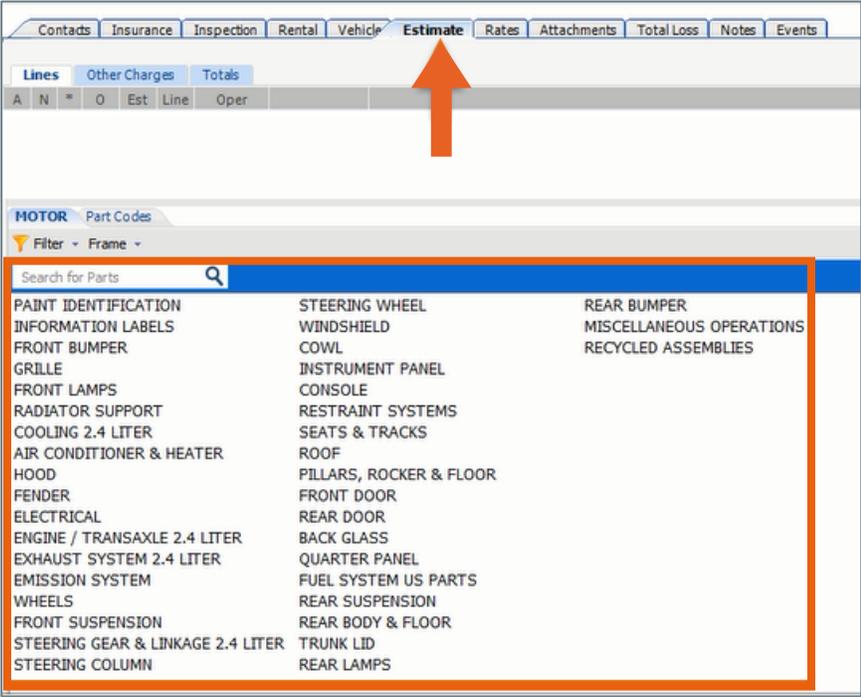| Step	Action
1	In the **General** section of the **Vendor Detail** page, click the **Enabled** button - it will display Disabled. Click **Save when done.** **Note:** The selected vendor will be disabled for electronic ordering. It will display orange bar next to it.

Live Parts Pricing

Introduction   Once you have vendors set up, you can then view live parts pricing while writing your estimate in CCC® Estimating or CCC® Repair Workflow.

Getting Live Quotes while Writing the Estimate

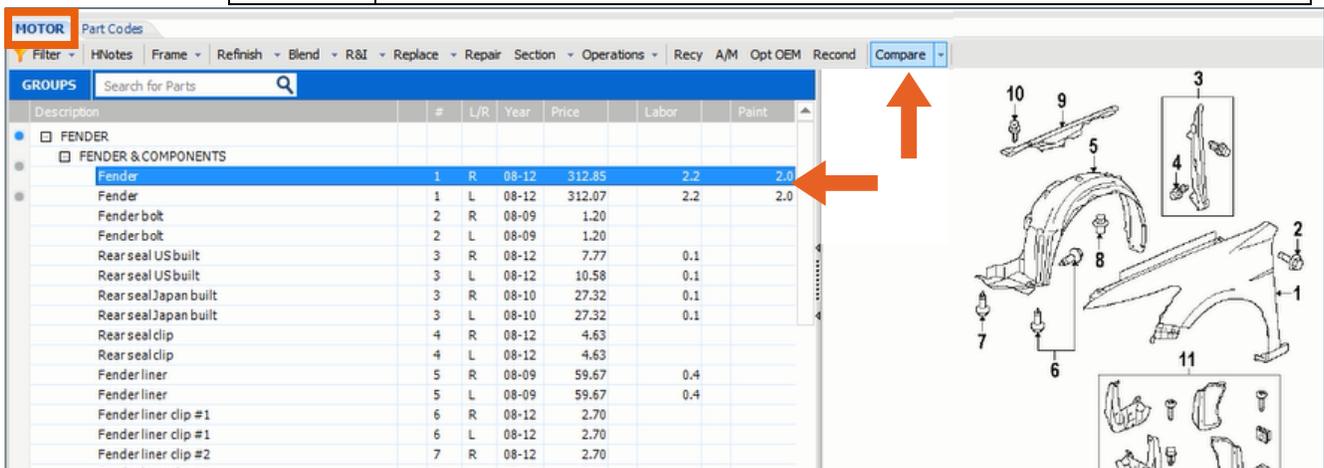You can get live quotes from electronically enabled vendors while writing the estimate as follows:

Step	Action
1	Select **View > Workfiles**.
2	Click the workfile from the list or create a new one: **Note:** In Estimating, Workfiles may be converted to Jobs. In Repair Workflow, Workfiles begin as Opportunities, then may be converted to Repair Orders.
3	Go to the **Estimate** tab. On the **MOTOR** panel, select the part category you need.

Live Parts Pricing, Continued

Getting Live Quotes while Writing the Estimate, continued

Step	Action
4	All available part types within the selected part category display. Select the desired part and click **Compare** to view live quoted results from your electronic vendors for all part types. You can also select the following actions to display live quotes: <table><tr><td>**Replace**</td><td>Displays live quotes on replaced parts</td></tr><tr><td>**Recy**</td><td>Displays live quoted results from electronic vendors for aftermarket parts only. Also displays any catalog parts available.</td></tr><tr><td>**A/M**</td><td>Displays live quoted results from electronic vendors for aftermarket parts only. Also displays any catalog parts available.</td></tr><tr><td>**Opt OEM**</td><td>Displays lived quoted results from electronic vendors for optional OEM parts only. Also displays any catalog parts available.</td></tr><tr><td>**Recond**</td><td>Displays live quoted results from electronic vendors for reconditioned parts only. Also displays any catalog parts available.</td></tr></table>

Getting Live Quotes while Writing the Estimate, continued

Step	Action
5	The parts results screen displays listing catalog parts and live quotes parts. Any promotional parts will display when using the Compare option. These appear if available with the selected part type choice when using any of the other search options. For example, while using AM search button, you will see Catalog parts, AM parts, and promo parts. **Note:** Remember that parts listed with a green bar next to the vendor name are quoted and may be ordered electronically. When selecting a quoted part, a green bar is displayed at the bottom of the screen. This bar includes additional information about the part from the vendor. Photos of the part may also be included. When photos exist, you can click on the photo thumbnail to view a larger image. Select the desired part and click **Add**.

Getting Live Quotes while Writing the Estimate, continued

Step	Action
	Note: Estimating only users will ONLY see promo codes if they have vendors set up electronically.
6	If you are selecting a recycled part, specify any additional labor time as needed and click **OK**.
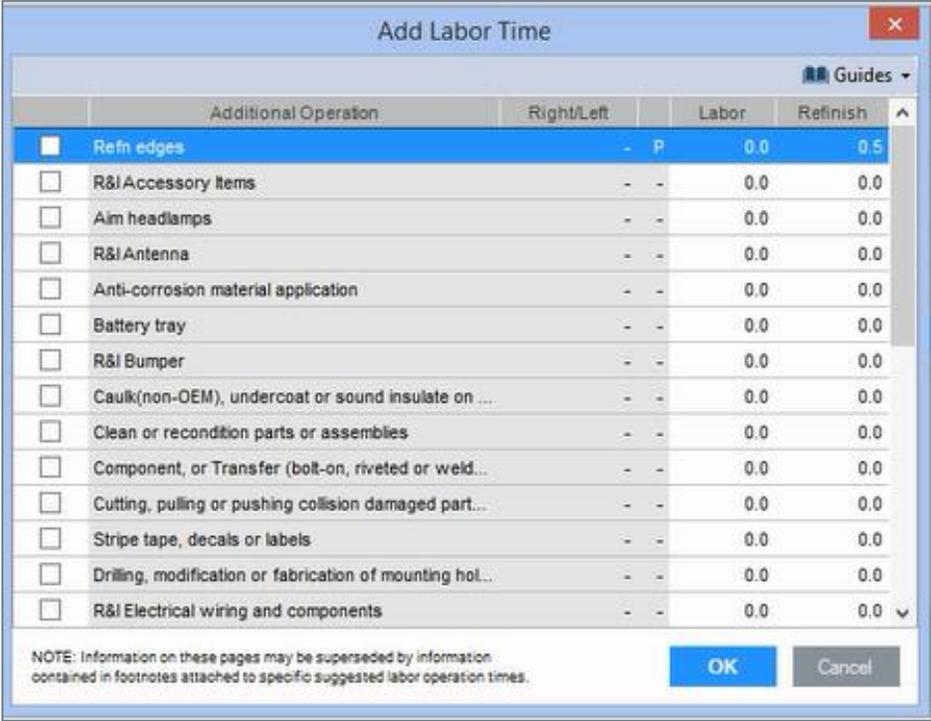
Step	Action
7	Repeat step 4 through 6 to add additional parts.

Live Parts Pricing, Continued

Getting Live Quotes while Writing the Estimate, continued

All parts that are selected display on the Estimate Lines tab.

The **Checkout** icon also displays the number indicating the number of electronic parts you selected. Static parts do not display in the Checkout cart.

Note: Static parts that are added to the estimate need to be ordered manually.

Each time a catalog OEM part is added to the estimate or any quoted part (OEM, ARO, Recy, the number in the checkout cart increases.

Place Electronic Orders

Introduction

Once you have identified the parts and the vendors that you want to purchase, you can then place the order electronically if you selected electronic vendors. This job aid describes how to place your order.

Placing Electronic Orders

Use the following steps to place an electronic purchase order for the selected parts.

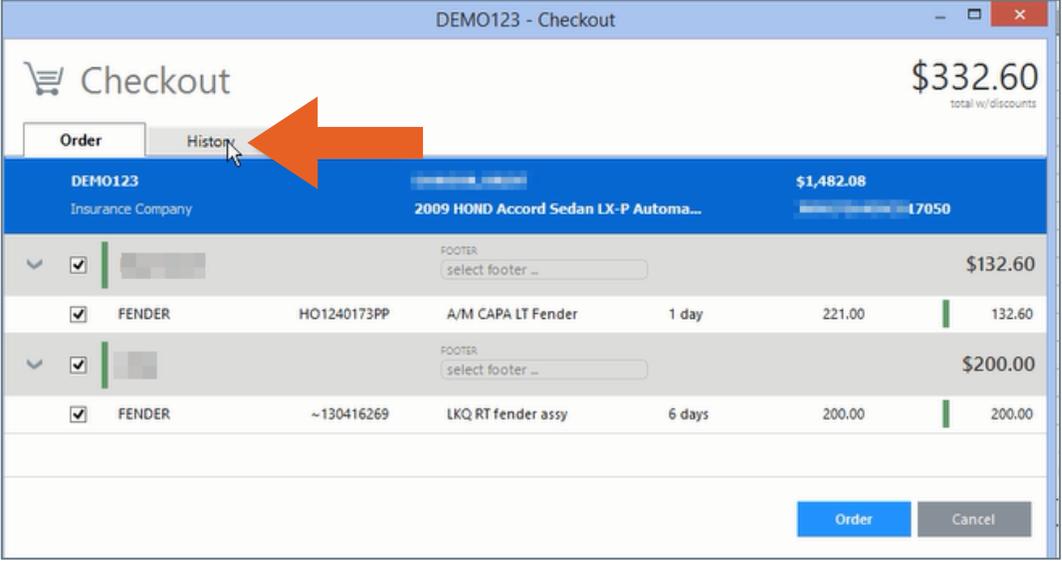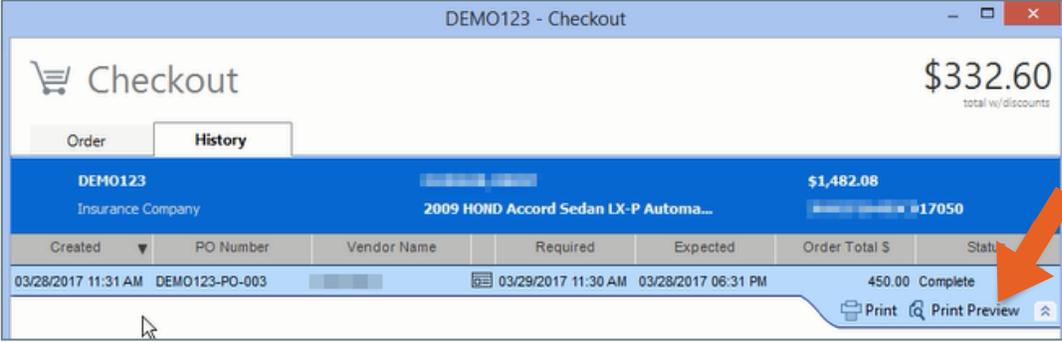| Step	Action
1	If you are using Repair Workflow, you must convert from Opportunity to Repair Order to be able to checkout. Otherwise, go to Step 2.
2	Once you have selected all of your parts, click the **Checkout** icon. **Note:** If you have added OEM catalog parts to the estimate and you have OEM electronic vendors configured for this vehicle make, then the checkout process will attempt to get live quotes for all of the OEM catalog parts.
3	Once a quote response is received for the OEM catalog parts, the **Checkout** form displays all quoted parts on the estimate. 1. Select parts that you wish to order electronically by clicking the boxes. If the selected part is no longer available, the inventory will grey out – you may need to select another vendor on the PO. 2. Click **Order**. **Note:** If you have selected a catalog part and received live quotes in the **Checkout** page, you must select the vendor to buy from. This page displays only electronic parts. Static parts will not display.
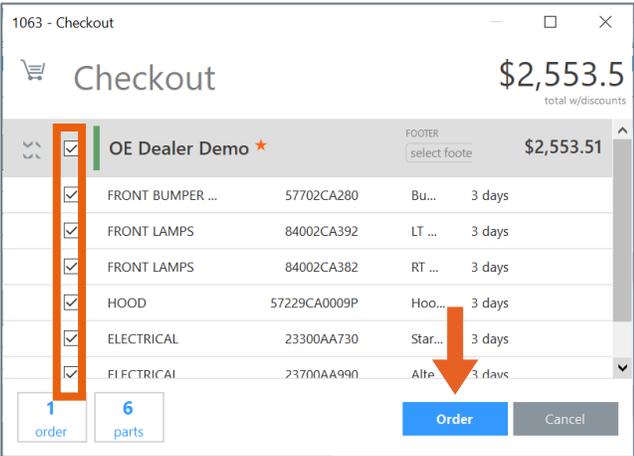
Placing Electronic Orders, continued

Note: Clicking the Order button sends an order to the specified electronic vendor. The Checkout icon on the workfile is updated to reflect the number of parts remaining to order. This will also reflect parts that are not selected or ordered.
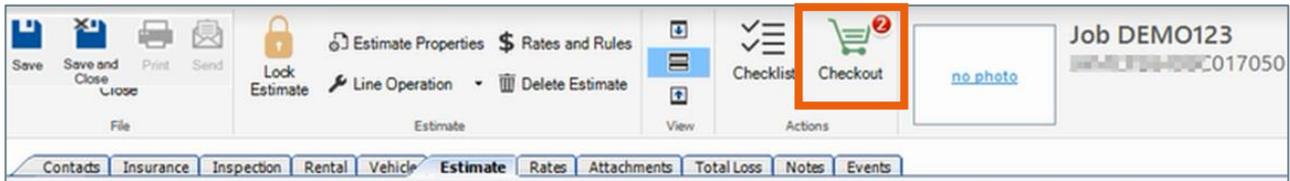
Viewing Parts Ordered Electronically

Viewing Parts that were Ordered Electronically

You can view parts that you have ordered electronically anytime on the Parts tab or from the Checkout screen as follows:

Step	Action
1	Select the **Checkout** action on the workfile. The Checkout form displays.
2	Click the **History** tab.

Step	Action
3	Checkout History lists the electronic purchase order you sent to the vendor. Click **Print Preview** to view details of the electronic purchase order.

Viewing Parts that were Ordered Electronically, continued

Step	Action
4	The electronic purchase order document includes the following information: • **Vendor** name and contact information • **Vehicle** information • **Electronic Quote Number** • **Vendor Order Number** once confirmed • **Parts** ordered

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