

Job Aid: Request Valuation

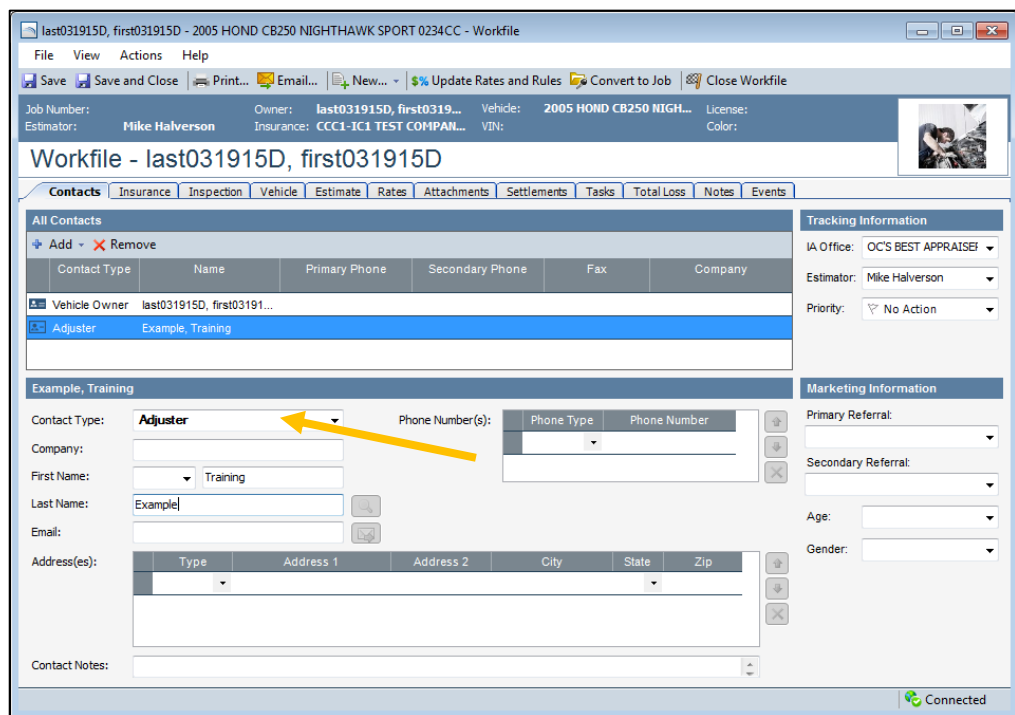
Purpose

This job aid demonstrates how to submit a Valuation Request from a workfile within CCC ONE® Estimating.

Before you Begin

Complete the required information on any or all of the workfile tabs, including (but not limited to):

- On the **Contacts Tab**: Add an **Adjuster name** and all of the Adjuster's pertinent information.



The screenshot shows the 'Contacts' tab in the software. The 'All Contacts' table lists 'Vehicle Owner' and 'Adjuster'. The 'Adjuster' row is selected, and its details are shown in the form below. A yellow arrow points to the 'Adjuster' dropdown menu in the 'Contact Type' field.

Contact Type	Name	Primary Phone	Secondary Phone	Fax	Company
Vehicle Owner	last031915D, first03191...				
Adjuster	Example, Training				

Example, Training

Contact Type: **Adjuster** (indicated by a yellow arrow) Phone Number(s):

Company:

First Name: Training

Last Name: Example

Email:

Address(es):

Type	Address 1	Address 2	City	State	Zip

Contact Notes:

- On the **Vehicle Tab**: enter the **VIN** and decode it. If it decodes correctly, a Good VIN message displays.
- **If the VIN is Unknown**: enter **UNK** and click **Select Standard Vehicle**. Select a vehicle from the list.

Important! These fields are required to submit a Valuation Request. Once entered, you can write an estimate or submit a total loss request. If no estimate is required, you can go directly to the Total Loss tab.

Continued on next page

Job Aid: Request Valuation, Continued

Request Procedure

Use the following steps to Submit a **Valuation Request** on the Total Loss Tab of the workfile.

Important! Make sure you entered the Adjuster's name on the Contacts Tab first! **If you forget, you will receive an error message that takes you back to the Contacts tab.**

Step	Action
1	The ZIP code where the loss vehicle is garaged is entered also. The ZIP code was entered on the workfile Contacts tab.
2	For Tax Type, the default is Auto Tax , which allows CCC to calculate sales tax based on the loss ZIP code. <div style="display: flex; align-items: center;"> <div style="border: 1px solid black; padding: 5px; margin-right: 10px;"> <p>Tax Type: Auto Tax ▼</p> <p>Tax Rate: Auto Tax</p> <p style="background-color: #0056b3; color: white; padding: 2px;">User Tax Rate</p> </div> <div> <p>You can manually override this by selecting User Tax Rate from the droplist, and then entering the tax rate in the field.</p> </div> </div>
3	You can enter information into the Special Instructions to CCC field. Note: This will result in the valuation not being completed instantly. A manual valuator will need to review the special instructions. <div style="border: 1px solid black; padding: 5px; width: fit-content; margin-left: auto;"> Special Instructions to CCC: <input style="width: 100%;" type="text"/> </div>

Note: Name / User ID should automatically display your default CCC ONE Valuation ID. To select another Valuation ID from the list, click the dropdown arrow and select it.

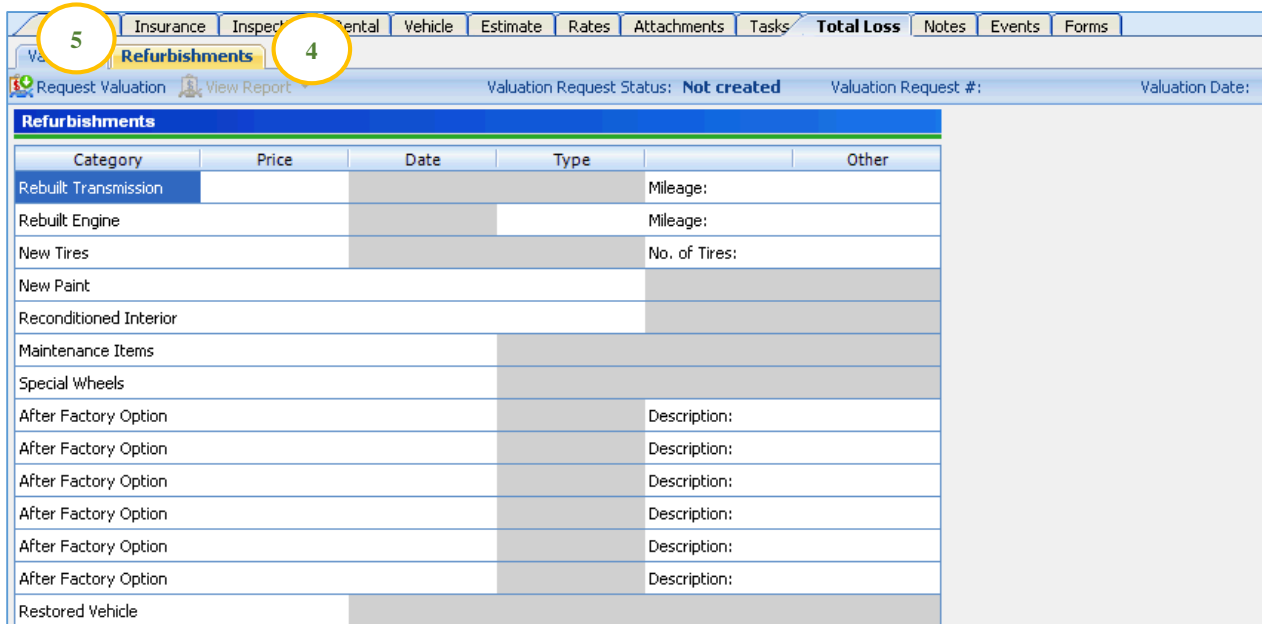
The screenshot shows the 'Valuation Request Options' form. At the top, there are tabs for 'Contacts', 'Insurance', 'Vehicle', 'Estimate', 'Rates', 'Attachments', 'Settlements', 'Tasks', 'Total Loss', 'Notes', and 'Events'. The 'Valuation' section is active, showing 'Request Valuation' and 'Valuation Report' options. The 'Valuation Request Status' is 'Not Created' and the 'Valuation Request #' is blank. The 'Valuation Date' is also blank. The form fields are: 'Name/User ID' (dropdown menu with a callout '1'), 'Zip Where Garaged' (text field), 'Tax Type' (dropdown menu with a callout '2'), and 'Tax Rate' (text field with '0.00'). There are checkboxes for 'Leased Vehicle', 'Third Party', and 'Send deductible as an Adjustment'. The 'Special Instructions to CCC' field has a callout '3' and a red warning message: 'Any Information entered in this field will prevent an instant vehicle valuation.' Below this is a 'Valuation Request Note' text area.

Continued on next page

Job Aid: Request Valuation, Continued

Request Procedure, continued

Step	Action
4	Enter refurbishments if needed on the Refurbishments tab, and then return to Valuation tab.



The screenshot shows the software interface with the 'Refurbishments' tab selected. The 'Request Valuation' button in the toolbar is circled with a yellow circle containing the number '5'. The 'Refurbishments' tab itself is also circled with a yellow circle containing the number '4'. The main area displays a table for entering refurbishment details.

Category	Price	Date	Type	Other
Rebuilt Transmission				Mileage:
Rebuilt Engine				Mileage:
New Tires				No. of Tires:
New Paint				
Reconditioned Interior				
Maintenance Items				
Special Wheels				
After Factory Option				Description:
After Factory Option				Description:
After Factory Option				Description:
After Factory Option				Description:
After Factory Option				Description:
After Factory Option				Description:
Restored Vehicle				

5	Once you have completed all required information, click the Request Valuation button in the toolbar.
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You will receive notification that the request was submitted. The status on the workfile will change:

Valuation Request Status: Submitted	Valuation Request #: 42846747
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When the report is returned, you will find the .pdf copy on the Attachments tab and on the Workfiles View Preview.