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CCC ONE® Communications Features

Overview

Introduction CCC has made several enhancements to the communication functions within CCC ONE® to improve ease of use and cycle time. With an “always connected” platform, CCC ONE® receives and sends assignments and estimates automatically.

This job aid summarizes the new features related to communications.

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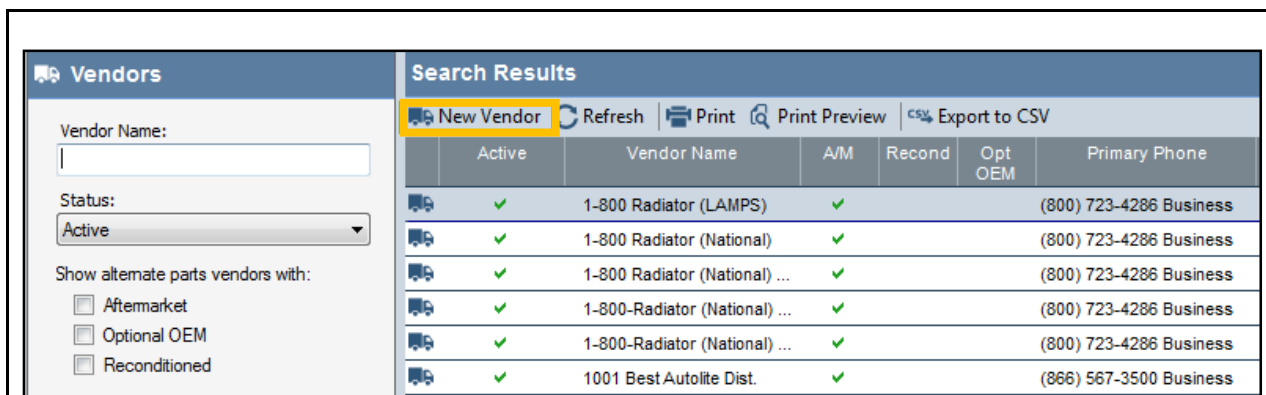
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Setup Job Aid: Add Aftermarket, Reconditioned and Optional OEM (ARO) Vendors to CCC ONE®

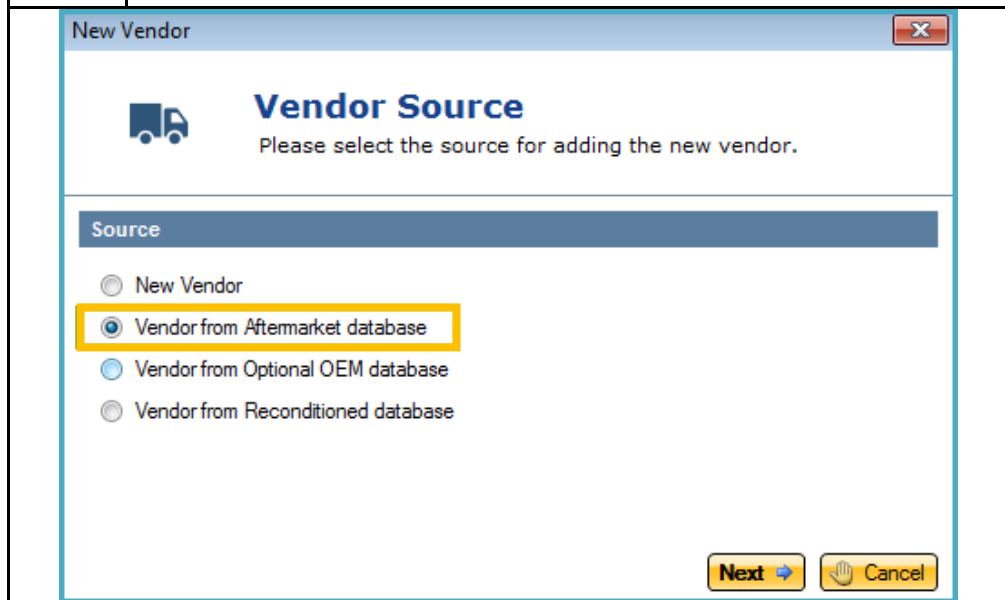
Purpose This Job Aid demonstrates how to add ARO Vendors.

Procedure Use the following steps to add Aftermarket Vendors.

Step	Action
1	Go to the View Menu and select Vendor . The Vendor screen displays.



2 Click on the **New Vendor** link. The New Vendor wizard displays. You must select the Vendor Source to begin.



Continued on next page

Setup Job Aid: Add Aftermarket, Reconditioned and Optional OEM (ARO) Vendors to CCC ONE®, Continued

Procedure
(continued)

Step	Action
3	Select Vendor from Aftermarket database and then click Next . The Select Vendors criteria display.
4	Select desired search criteria and then click the Search button. Vendors that meet the selected criteria display as shown above.
5	Click on the checkbox of desired vendors to select them and then click Next . The Activate Aftermarket Vendor screen displays.
	Click Finish to add the selected Vendors.
7	Repeat steps to add Recycled or Optional OEM vendors.

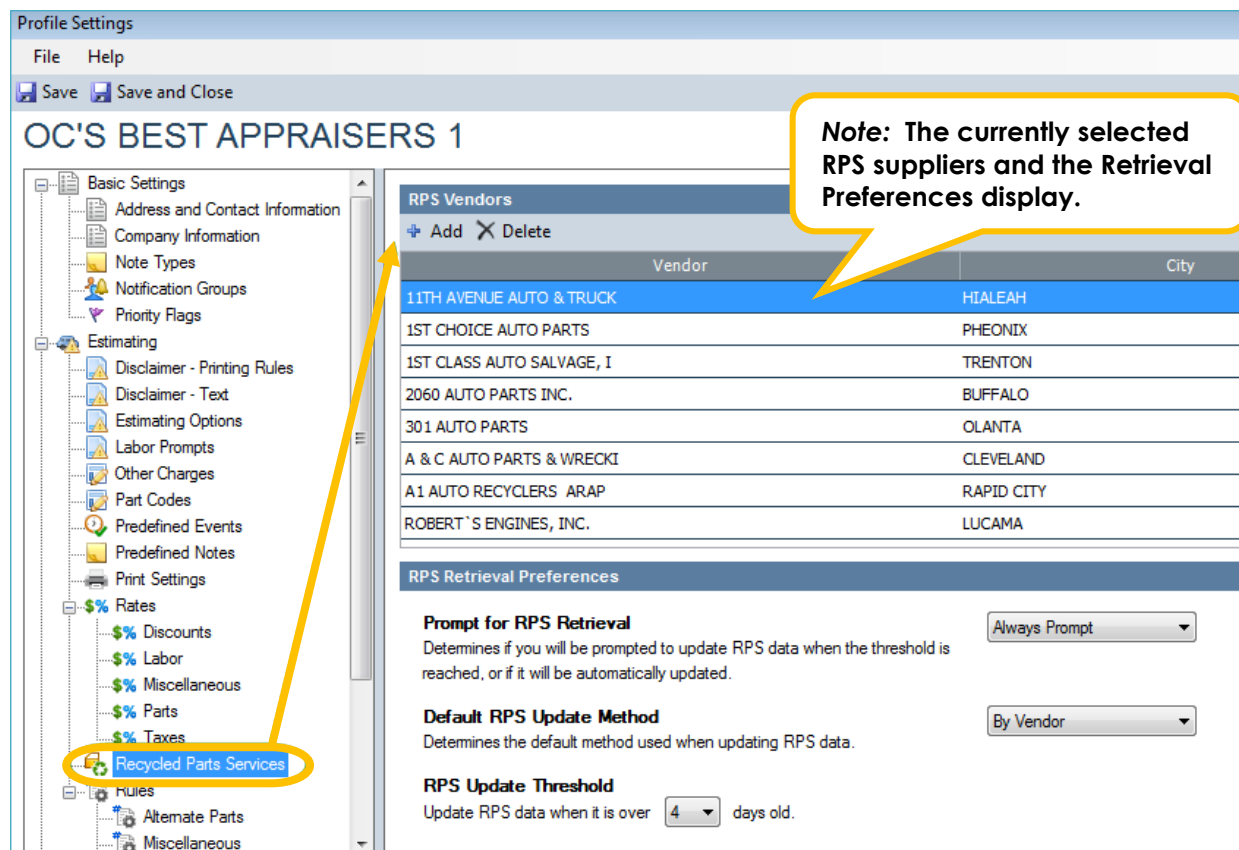
Important! You may get a prompt to identify the right Vendor if multiple similar vendors match the one you select. Select the correct Vendor and continue to this screen.

Setup Job Aid: Add Recycled Parts Services (RPS) Suppliers

Purpose This Job Aid demonstrates how to add/update Recycled Parts Services suppliers to your IA Location Profile.

Procedure Use the following steps to add RPS suppliers to your IA location profile.

Step	Action
1	Go to the Configure menu and select Profiles .
2	Open the IA Location profile. This is the first profile listed in the grid.

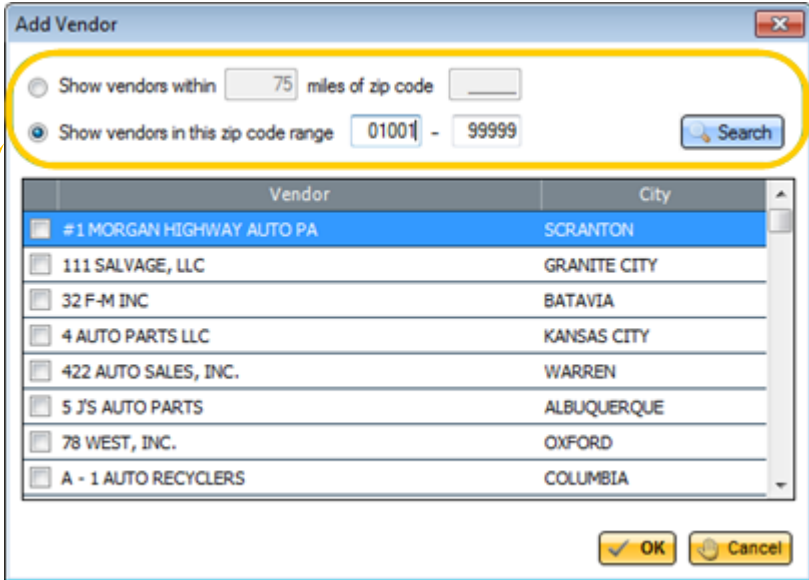


3	Locate the Recycle Parts Services option on the left pane and click to open the RPS Vendors portion of the Profile.
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Setup Job Aid: Add Recycled Parts Services (RPS) Suppliers, Continued

Procedure, (continued)

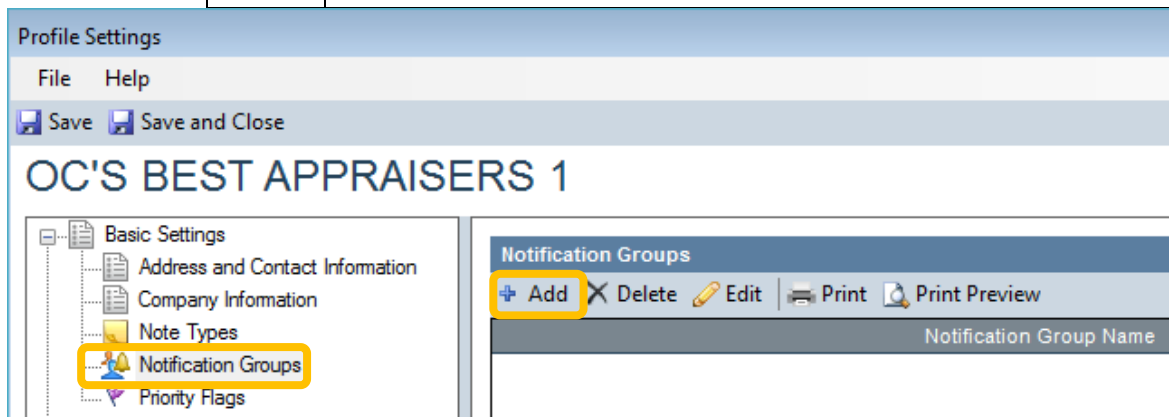
Step	Action
4	<p>Click the Add link. The Add Vendor dialog displays.</p>  <p>Note: Add Vendor displays with the default (or last) search options selected. The vendors that meet the criteria automatically display.</p>
	<p>Select desired criteria (show within X miles or zip code range) and click Search. Vendors that meet the selected criteria display.</p>
6	<p>Click on each checkbox of the desired vendors to select them.</p>
7	<p>Click OK to add those vendors to the RPS section of the Profile.</p>
8	<p>Click on Save and Close in the toolbar.</p>

Setup Job Aid: Configure Notifications Groups

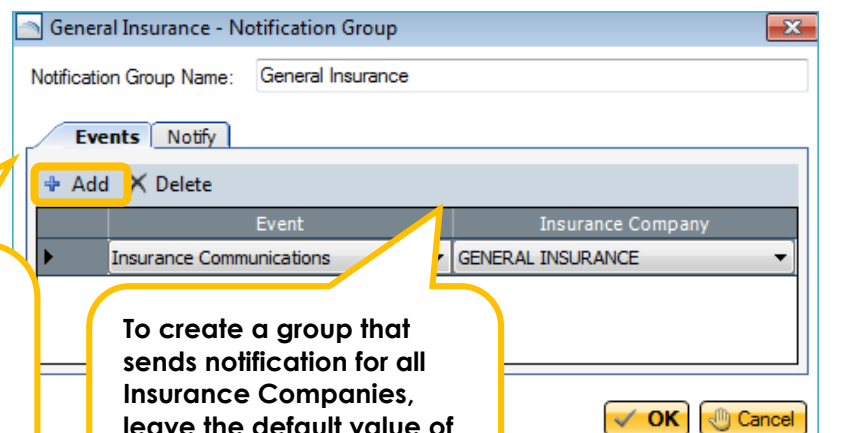
Purpose By default, assignment notifications and Autoverse messages will be delivered to all users. The messages can be delivered to specific users for specific insurance companies. This Job Aid demonstrates how to setup and configure notifications groups to receive these messages.

Procedure Use the following steps to configure Notification Groups:

Step	Action
1	Go to the Main Menu, and select Configure > Profiles .
2	Locate and click on the IA Location Profile . The Profile will display in a new window.
3	In the left pane, Notification Groups . The Notification Groups screen displays.



4 Click on **Add** in the Notification Groups toolbar.



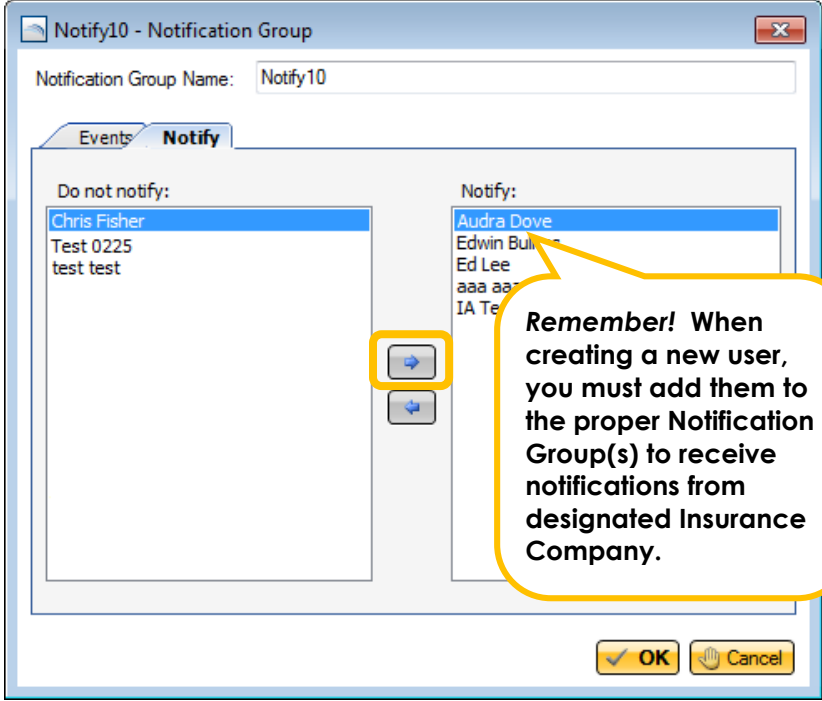
Use the Events tab to add notification event types and Insurance Companies to this Notification Group. The members of this group will receive messages from those Insurance Companies for those types of events.

To create a group that sends notification for all Insurance Companies, leave the default value of "All Insurance Companies" in this field.

Continued on next page

Setup Job Aid: Configure Notifications Groups, Continued

Procedure,
(continued)

Step	Action
5	Enter a Name for the Notification Group (e.g., General Insurance).
6	In the Events tab, click on Add .
7	Use the menu to select the Event type. We suggest " Insurance Communications ".
8	Select the desired Insurance Company whose messages this Group should receive.
9	Click on the Notify tab. 
10	Select the Employees to notify when an assignment or message is received from the selected Insurance Company.
11	Click the OK button. You are returned to the Profile.
12	Click Save and Close to save your changes to the Profile.

Setup Job Aid: Profiles and Claim Offices

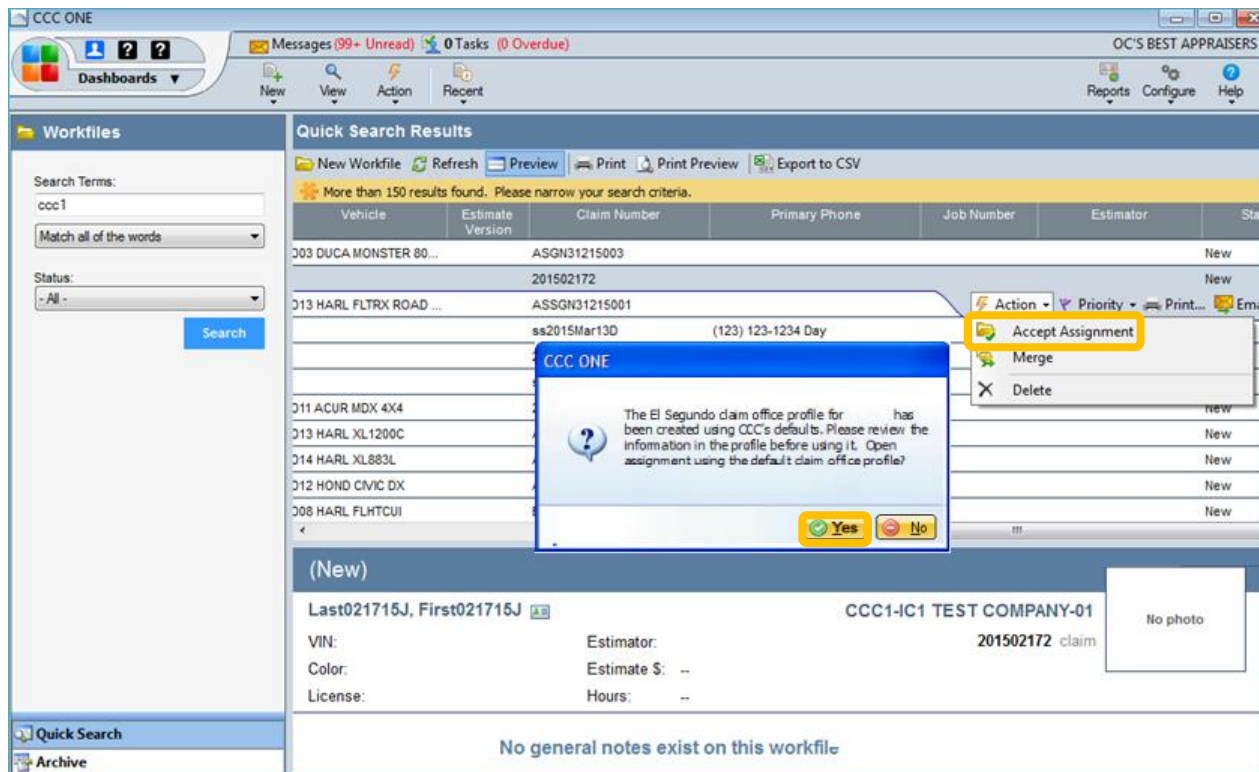
Purpose

Profiles and Claim Offices are automatically converted from CCC Pathways® to CCC ONE®. New Insurance Company and Claim Office Profiles are now automatically created as new assignments are received. All users may remain in the system while profiles are created or modified. This Job Aid demonstrates how this works.

New Profile Procedure

When an assignment originating from a new Insurance Company profile is received, the user will be prompted to automatically create the profile. Use the following steps to handle the new Profile.

Step	Action
1	Locate and double click on the new assignment workfile or click on the Action menu and select " Accept Assignment ".



The screenshot shows the CCC ONE software interface. On the left, there is a 'Workfiles' sidebar with search filters. The main area displays 'Quick Search Results' with a table of workfiles. One workfile is highlighted, and a context menu is open over it, showing options like 'Accept Assignment', 'Merge', and 'Delete'. A dialog box titled 'CCC ONE' is overlaid on the screen, asking: 'The El Segundo claim office profile for [redacted] has been created using CCC's defaults. Please review the information in the profile before using it. Open assignment using the default claim office profile?'. The dialog has 'Yes' and 'No' buttons.

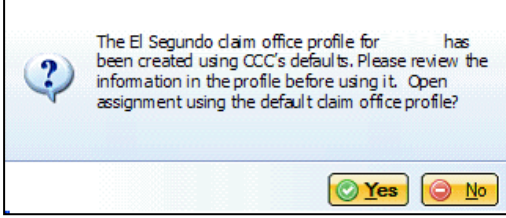
2	The system prompts you that the Claim Office Profile does not exist. Click the Yes button to add the new Profile.
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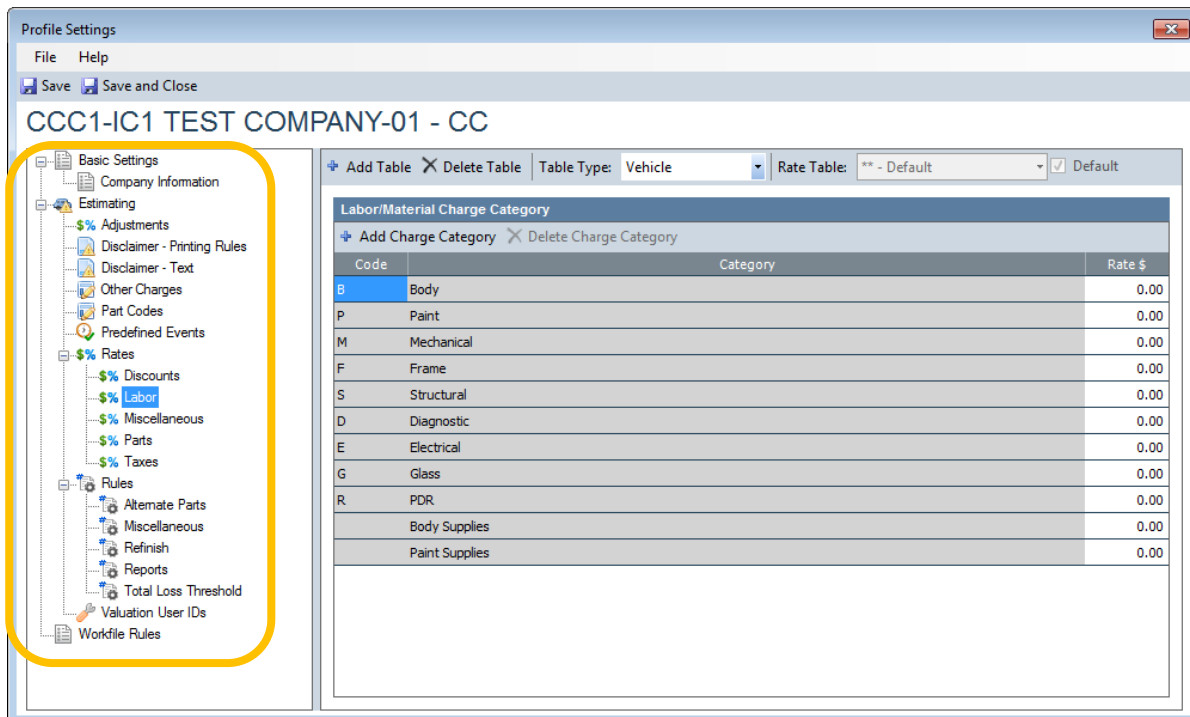
Setup Job Aid: Profiles and Claim Offices, Continued

Procedure,
(continued)

Important! Verify the rates and rules are set up properly **PRIOR** to opening the workfile. To do this, go to **Configure Profiles**.

Step	Action
3	<p>The system creates the new Claim Office Profile with CCC's defaults, and then asks if you want to open the assignment using this profile.</p>  <p>Click Yes to continue or No if you need to update the Claim Office Profile with rates first.</p>

To edit the Claim Office Profile first, click **NO**. When you return to the main view, go to **Configure > Profiles** and select the appropriate Claim Office Profile. The Profile displays for you to update as needed. Then return to the Workfiles View to open the assignment as normal.



The screenshot shows the 'Profile Settings' window for 'CCC1-IC1 TEST COMPANY-01 - CC'. The left sidebar has a tree view with 'Rates' selected and highlighted in yellow. The main area shows a table of 'Labor/Material Charge Category' with columns for Code, Category, and Rate \$.

Code	Category	Rate \$
B	Body	0.00
P	Paint	0.00
M	Mechanical	0.00
F	Frame	0.00
S	Structural	0.00
D	Diagnostic	0.00
E	Electrical	0.00
G	Glass	0.00
R	PDR	0.00
	Body Supplies	0.00
	Paint Supplies	0.00

Workflow Job Aid: Assignment Retrieval

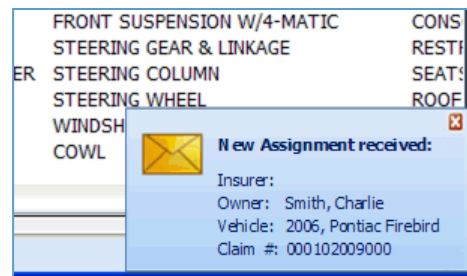
Purpose

Assignments are now received automatically in CCC ONE®. A user must be logged into CCC ONE® to be notified of a new assignment. This Job Aid describes the three ways to identify new assignments.

Assignment Notification Popup

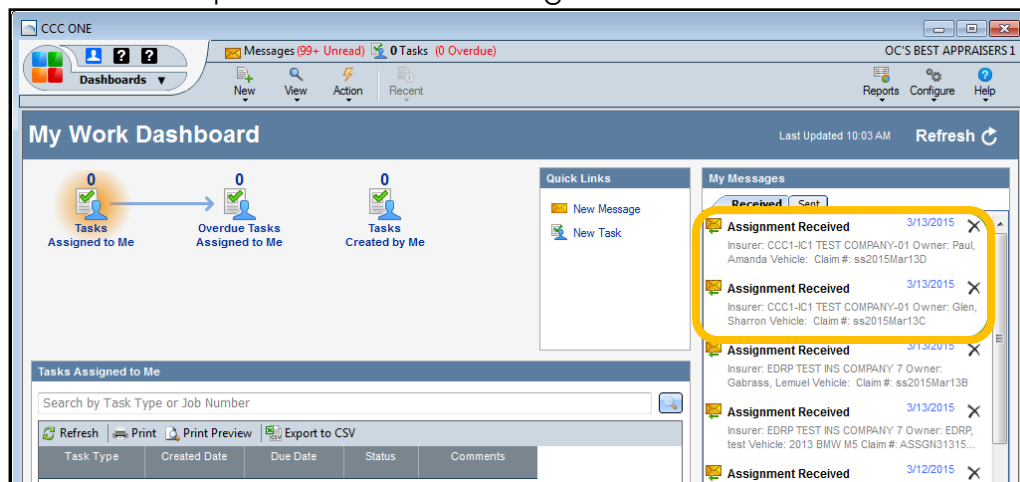
By default, assignment notifications will only be delivered to admin users that have the **Edit User** permission. A Notification Group (or groups) must be configured in order for non-admin users to receive Insurance assignment notifications.

A popup in the bottom right corner of the application appears for each user designated within the Notification Group as well as all Admin users. You can click on the assignment notification popup to view the assignment details. Assignment notifications can also be directed to specific users for specific insurance companies as described in the **Setup Notification Groups** section.



Assignment Message

Each assignment notification appears as a message in the **My Work Dashboard**. You can select the message as well as open the assignment from within the message. New messages appear as an envelope opening at the top of the main screen regardless of the view selected.

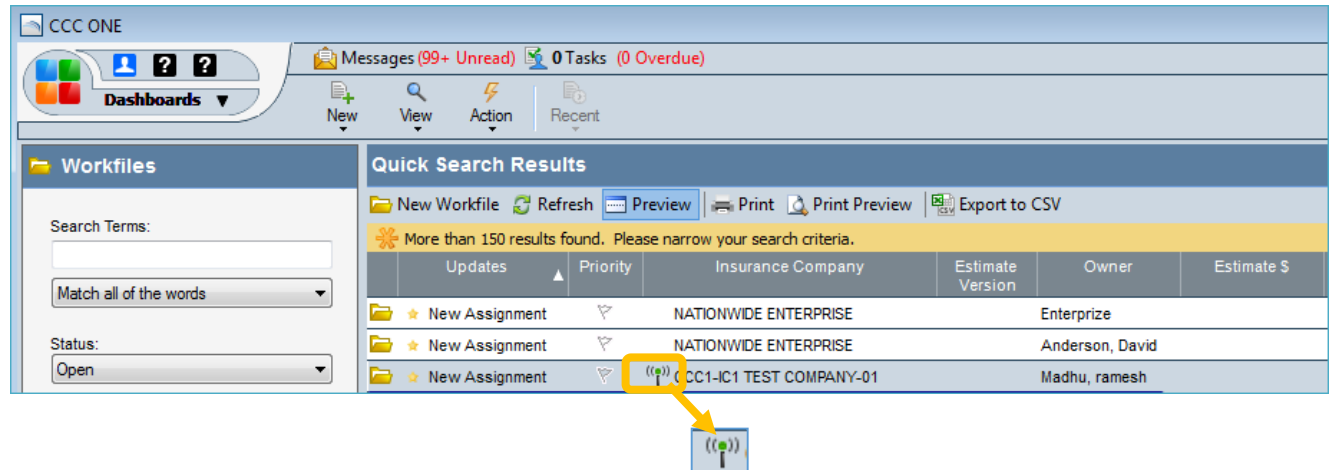


By default new assignment messages are delivered to all users. Assignment messages can be directed to specific users for specific insurance companies as described previously.

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Workflow Job Aid: Assignment Retrieval, Continued

New Workfile New assignments will appear in the New Workfile view from within the Workfile List (select **View > Workfiles**).



The screenshot shows the 'Workfiles' section of the CCC ONE interface. On the left, there is a search panel with 'Search Terms' and 'Status' dropdowns. The main area displays 'Quick Search Results' with a table of assignments. The table has columns for 'Updates', 'Priority', 'Insurance Company', 'Estimate Version', 'Owner', and 'Estimate \$'. Three rows are visible, each starting with a star icon and the text 'New Assignment'. The 'Insurance Company' column contains 'NATIONWIDE ENTERPRISE' for the first two rows and 'CC1-IC1 TEST COMPANY-01' for the third row. A green radio icon is highlighted in the 'Insurance Company' column of the third row, with a yellow arrow pointing to it from a separate icon below the table.

Updates	Priority	Insurance Company	Estimate Version	Owner	Estimate \$
★ New Assignment		NATIONWIDE ENTERPRISE		Enterprize	
★ New Assignment		NATIONWIDE ENTERPRISE		Anderson, David	
★ New Assignment		CC1-IC1 TEST COMPANY-01		Madhu, ramesh	

Assignments in the workfile list are easily identified by a green radio icon next to the Insurance Company name. The Insurance Company name field is a default column in the workfile list.

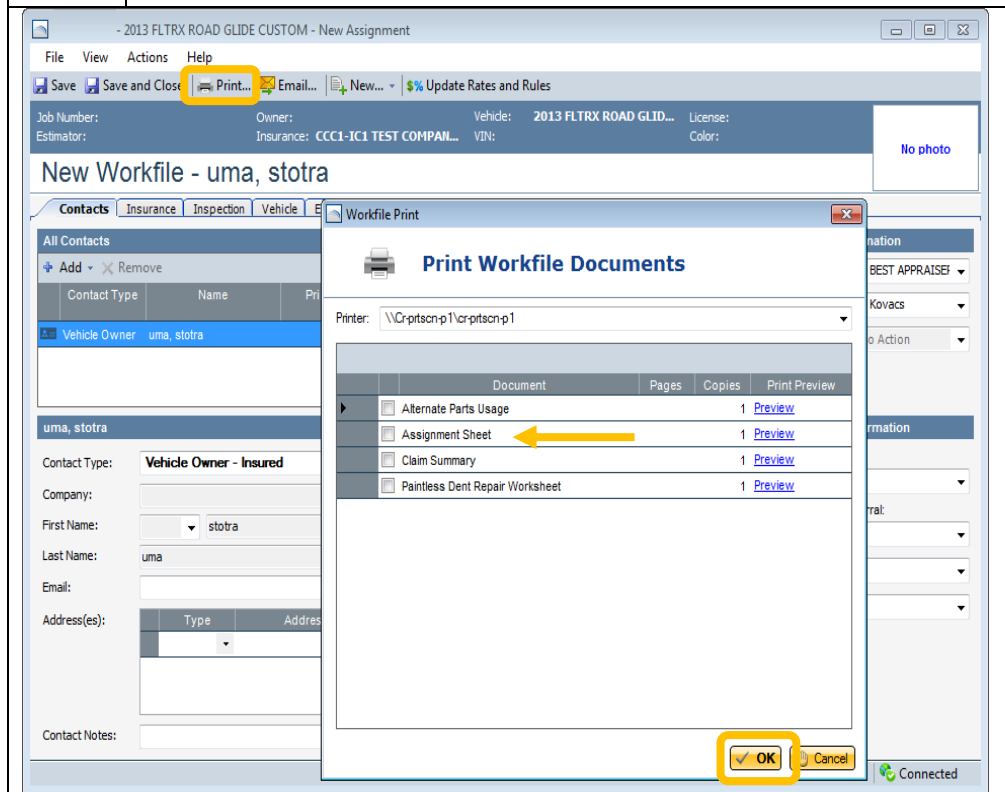
If this column is not visible, the user may select it from the column picker by right clicking on the column headers and selecting the Insurance Company.

Workflow Job Aid: Printing Assignment

Purpose Independent Appraiser companies will no longer receive assignment notifications via fax. This Job Aid demonstrates the steps for printing an assignment notification in CCC ONE® Estimating.

Procedure Use the following steps to print an assignment:

Step	Action
1	Locate and open the assignment workfile using any of the methods described in Assignment Retrieval section.
2	Click on Print and then select the " Assignment Sheet ".
3	Click the OK button.

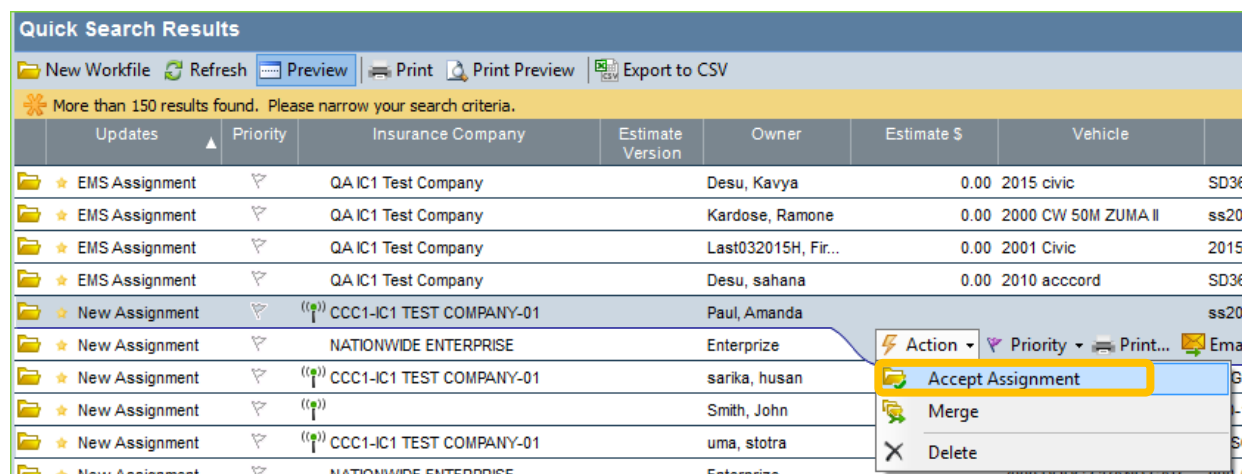


This will print the assignment in the same format previously available when printing from fax.

Workflow Job Aid: Accept Assignments

Purpose This Job Aid describes the two methods of accepting assignments. This will remove the assignment from the **New Filter** on the Search panel.

Workfile Procedure Right click on the assignment in the workfile view or click on the mini-tool bar for that assignment workfile and select **Action > Accept Assignment**.



Updates	Priority	Insurance Company	Estimate Version	Owner	Estimate \$	Vehicle	
★ EMS Assignment	▼	QA IC1 Test Company		Desu, Kavya	0.00	2015 civic	SD36
★ EMS Assignment	▼	QA IC1 Test Company		Kardose, Ramone	0.00	2000 CW 50M ZUMA II	ss20
★ EMS Assignment	▼	QA IC1 Test Company		Last032015H, Fir...	0.00	2001 Civic	2015
★ EMS Assignment	▼	QA IC1 Test Company		Desu, sahana	0.00	2010 accord	SD36
★ New Assignment	▼	CCC1-IC1 TEST COMPANY-01		Paul, Amanda			ss20
★ New Assignment	▼	NATIONWIDE ENTERPRISE		Enterprize			
★ New Assignment	▼	CCC1-IC1 TEST COMPANY-01		sarika, husan			
★ New Assignment	▼			Smith, John			
★ New Assignment	▼	CCC1-IC1 TEST COMPANY-01		uma, stotra			
★ New Assignment	▼	NATIONWIDE ENTERPRISE		Enterprize			

This will remove the assignment from the **New** view and it will only be visible in the **All** view.

Assignment Retrieval Open the assignment using any of the methods described in Assignment Retrieval section. Click on **Save** or **Save and Close** from the menu bar.

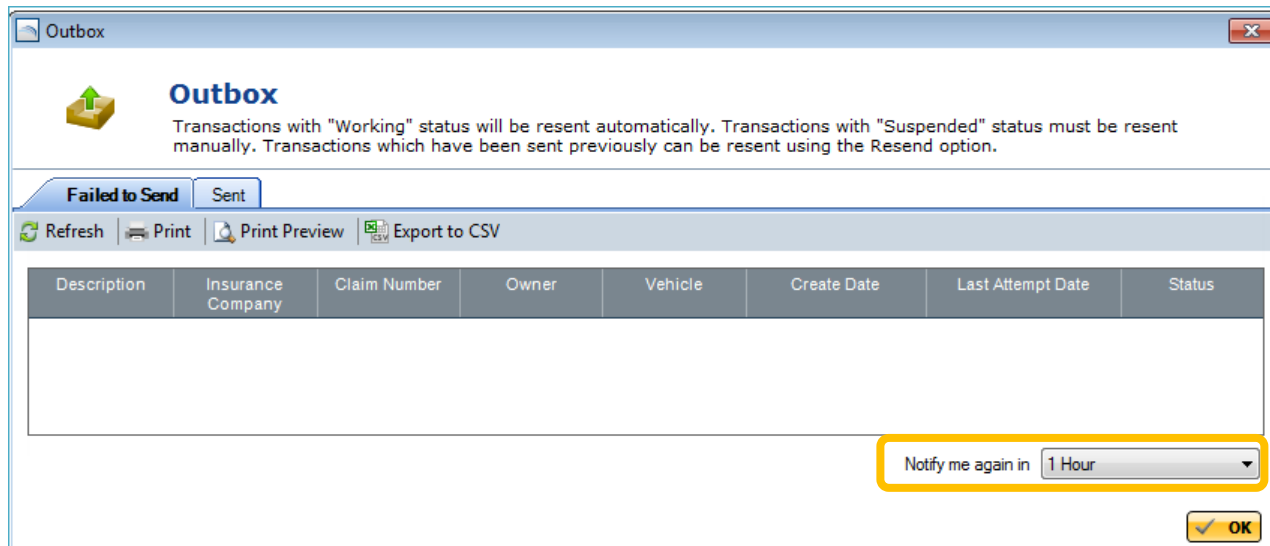
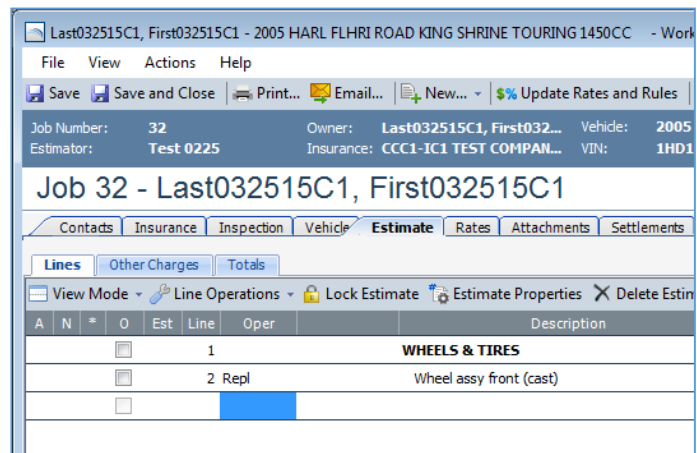
This will remove the assignment from the **New** view. Going forward, the workfile will be visible in the **All** view. It could also appear in the **Assigned to me** or **Unassigned** views depending on who is assigned as the estimator.

Workflow Job Aid: Upload Locked Estimate or Supplement

Purpose This Job Aid describes how uploading an estimate or supplement works in CCC ONE®.

Automatic Upload Once the estimate or supplement is complete, selecting **Lock Estimate (Lock Supplement)** from the toolbar in the Workfile Estimate tab will automatically queue the estimate for delivery. The locked estimate or supplement will be sent automatically in the background while the user is still working in CCC ONE®.

Note: If the estimate fails to send within 2 hours, you will be notified. The Outbox appears automatically and you can choose the duration to be notified again (30 min, 1 hour, 2 hours, 1 Day).



Estimates with **Working** status will be resent automatically. Estimates with **Suspended** status must be resent manually from the Outbox. To view the Outbox select Help from the main system view and Outbox.

Workflow Job Aid: Upload Images

Purpose

CCC ONE® allows you to store multiple attachment and document types (i.e. JPEG, Adobe PDF, Microsoft Word Doc, etc). You can also designate which images are uploaded to the Insurance Company. This Job Aid demonstrates how to upload images.

Important! Only .jpg and PDF files may be uploaded to Insurance Companies at this time. CCC ONE® will automatically resize images to reduce the size of each image optimizing the number of images that may be stored and sent.

Procedure

Use the following steps to attach workfile images:

Step	Action
1	Open desired workfile and go to the Attachments tab.



2	On the Attachments tab, click on Actions > Attach - From Folder .
3	Browse to the proper folder where you have previously transferred images from a digital camera.
4	Select one or multiple images by holding down the CTRL-Key and selecting the desired images.
5	Click Open .
6	Alternatively , images may be selected directly from a digital camera that is recognized by the computer (i.e. via USB cable) by selecting Action > Attach from Camera or Scanner . Select the device (digital camera) and then select the images from the device.

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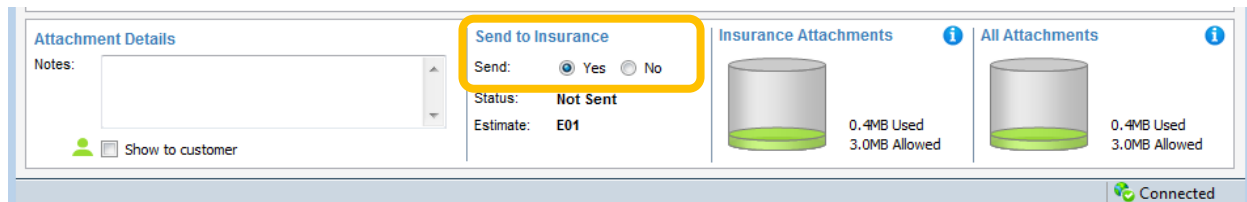
Workflow Job Aid: Upload Images, Continued

Describing Images

To describe each image. Select the image thumbnail and enter a description of the image in the Notes field at the bottom of the Attachments View. This is the only information insurance companies will see. Changes to the image labels directly under the image or attachment is not visible by the Insurance Company.

Sending Images

By default, images are marked to be sent to the Insurance Company. To **deselect** an image to be sent to the Insurance Company, locate the image thumbnail within the Attachments View and select the **No** option below.



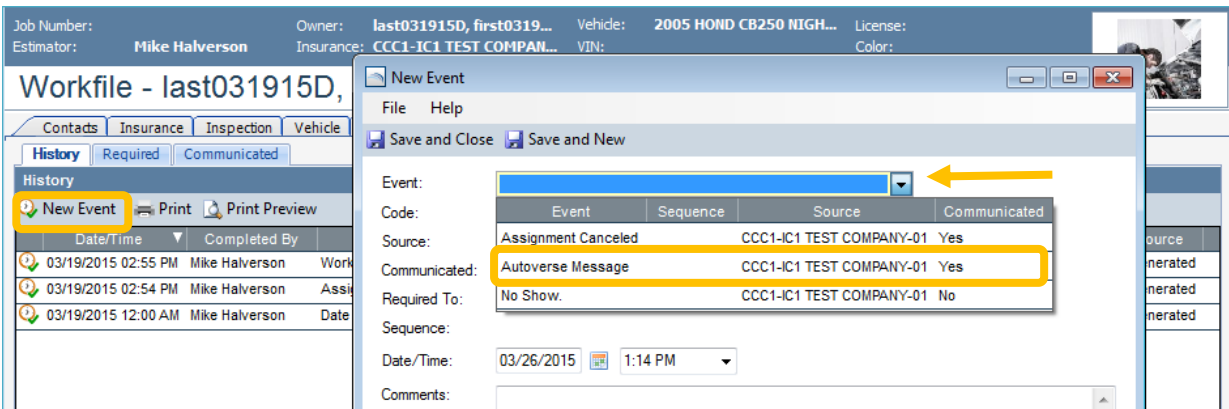
Images will be sent to the Insurance Company once the estimate or supplement is locked.

Workflow Job Aid: Add an Event to a Workfile

Purpose Events are used to communicate information to Insurance Companies in CCC ONE® just as they were in CCC Pathways®. This Job Aid describes how to add an Event to a workfile.

Procedure Use the following steps to add an Event to a workfile:

Step	Action
1	Locate and open the desired workfile.
2	Click on the Event tab within the workfile. The Event tab displays.
3	From the toolbar, click on New Event .



4	Select the desired event from the Event drop down menu.
5	Enter any additional information or comments that are required for the Event.

All Events are stored in the workfile and Events that are set to be communicated are sent automatically once the workfile is saved. The other events are stored in the workfile and sent when the estimate is locked.

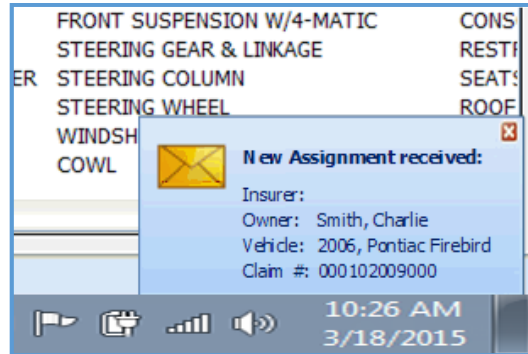
Workflow Job Aid: Receive Autoverse Messages

Purpose

Autoverse messages are sent by Insurers to IA companies. These messages are now received automatically within CCC ONE®. This Job Aid describes the three ways to view these messages.

Message Notification Popup

By default, Autoverse message notifications will only be delivered to Admin users that have the **Edit User** permission. A Notification Group (or Groups) must be configured in order for non-Admin users to receive Autoverse message notifications.

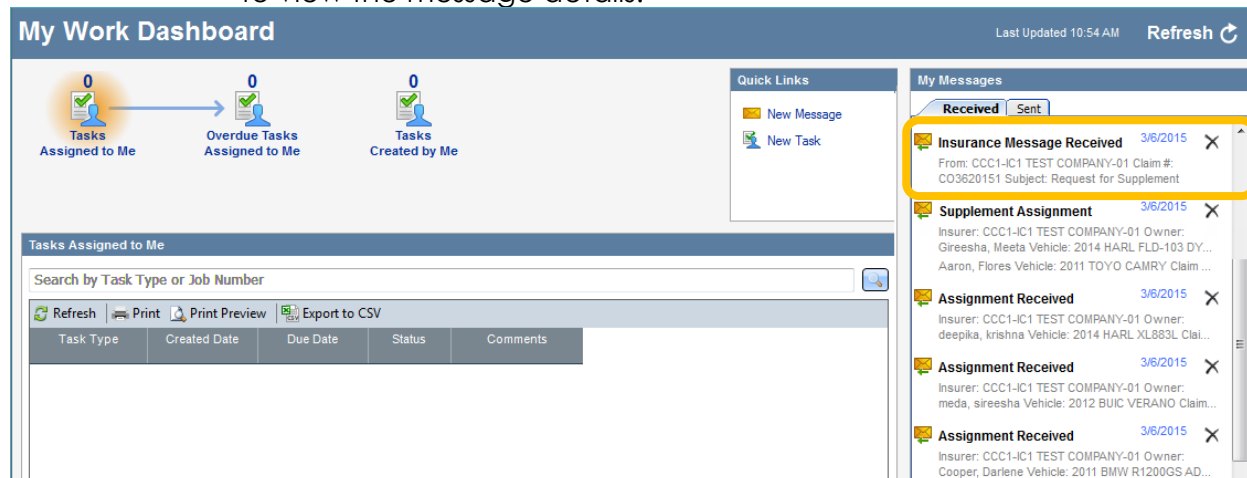


A popup in the bottom right corner of the application appears for each user designated within the Notification Group as well as all Admin users.

Message notifications can be directed to specific users for specific insurance companies as described in the Setup Job Aid for Notification Groups.

Message Center

Each assignment notification will appear as a message in the **My Work Dashboard**. The message may be selected from the message center to view the message details.



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Workflow Job Aid: Receive Autoverse Messages, Continued

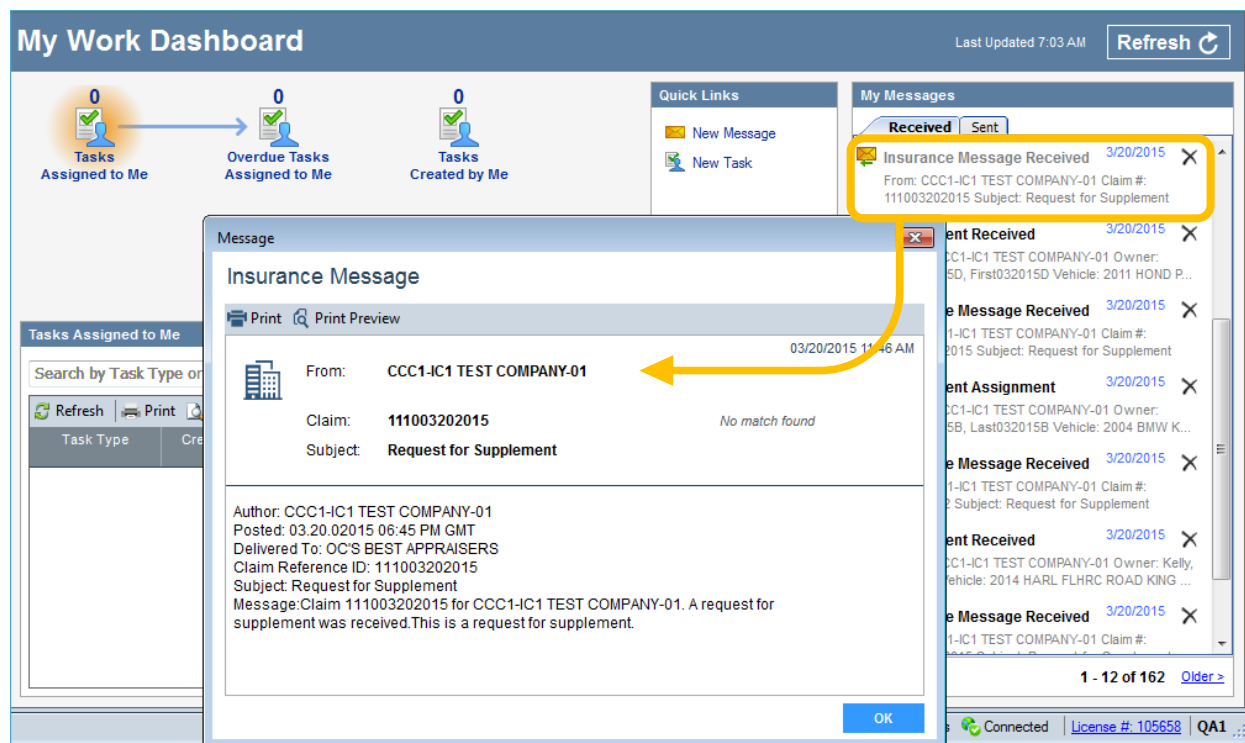
Message Center, continued

New messages appear as an envelope opening at the top of the primary CCC ONE® application screen regardless of the view that is selected.



By default new messages are delivered to all users. You can also set up Notification Groups as shown in the Setup section.

You can create and direct Autoverse messages to specific users for specific insurance companies as described in setup.



Continued on next page

Workflow Job Aid: Receive Autoverse Messages, Continued

Notes View From within the workfile, you can select the Notes tab, and then select Insurance Messages to view all CCC ONE® Messages for that workfile.

The screenshot shows the 'Notes' tab in a workfile. The 'Insurance Messages' section is active, displaying a message from the portal. The message details are as follows:

Type	Note	Critical	Date/Time	Author	Category
Insurance Message	2nd message from portal (insurance message): Author: Killinger, Amber Posted: 03.03.02015 11:12 PM GMT Delivered To: OC'S BEST APPRAISERS; Claim Reference ID: ss2015Mar03D Subject: 2nd message from portal (insurance message) Message:second message sent from portal		3/3/2015 3:12 PM		

Predefined Event Message To reply to these messages, create a new Event type called **Autoverse Message** in the Event Tab. Then add the Event to the workfile with your message. The event will be communicated when the workfile is saved.

The screenshot shows the 'New Event' dialog box. The 'Autoverse Message' event type is selected in the dropdown menu. The dialog box also shows a table of event details:

Event	Sequence	Source	Communicated
Advisory Comments : Other : PH		CCC1-IC1 TEST COMPANY-01	No
Assignment Canceled		CCC1-IC1 TEST COMPANY-01	Yes
At Shop		CCC1-IC1 TEST COMPANY-01	No
Autoverse Message		CCC1-IC1 TEST COMPANY-01	Yes
Called Customer		CCC1-IC1 TEST COMPANY-01	No
Called Insured		CCC1-IC1 TEST COMPANY-01	No