

Setup Job Aid: Profiles and Claim Offices

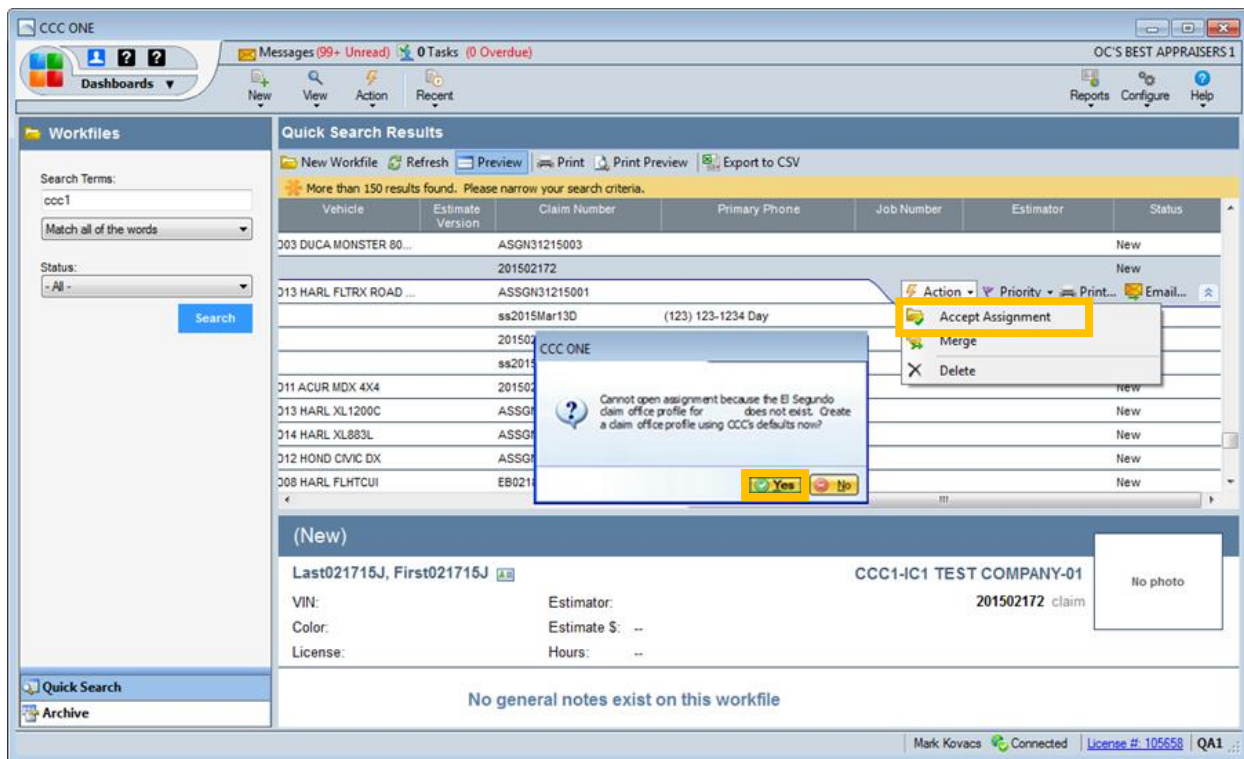
Purpose

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 for 'ccc1' and 'Match all of the words'. The main area displays 'Quick Search Results' with a table of workfiles. The table has columns for Vehicle, Estimate Version, Claim Number, Primary Phone, Job Number, Estimator, and Status. One row is highlighted, and its 'Action' menu is open, showing options like 'Accept Assignment', 'Merge', and 'Delete'. A modal dialog box is overlaid on the table, displaying an error message: 'Cannot open assignment because the El Segundo claim office profile for [redacted] does not exist. Create a claim office profile using CCC's defaults now?'. The dialog has 'Yes' and 'No' buttons. Below the table, there is a 'New' section with fields for VIN, Color, License, Estimator, Estimate \$, and Hours. The status bar at the bottom shows 'Mark Kovacs Connected License # 105658 QA1'.

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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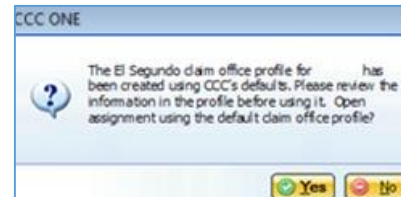
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Setup Job Aid: Profiles and Claim Offices, Continued

New Profile Procedure, (continued)

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>

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



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.

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