

Job Aid: Create Advisor Report in CCC® Estimating

Introduction CCC® Advisor is an integrated estimate audit feature that enables appraisers to electronically review estimates against custom business guidelines before locking the estimate. This job aid describes how to create an Advisor Report in CCC® Estimating.

Procedure Follow the steps below to create an Advisor Report and use it to review

Step	Action
1	Open the workfile and select the Estimate tab.
2	When the estimate is complete, click on the Advisor tab in the MOTOR Database panel.
3	Click on Click here to get Advisor Report link.

The screenshot shows the CCC Estimating software interface. The top menu bar includes FILE, WORKFILE, VIEW, and EDIT. The main toolbar contains various icons for file operations, estimate management, and repair actions. The central pane displays the 'Estimate' tab for a 2020 BMW 5 Series 530i, with a total estimate of \$3,551.18. A table of estimate lines is visible, with a blue circle '2' highlighting the 'Advisor' tab in the MOTOR Database panel. Below the table, a blue circle '3' highlights the 'Click here to get Advisor Report' link.

Lines	Other Charges	Totals	\$3,551.18 threshold: 10% Preliminary Estimate								
A	N	O	Est	Line	Oper	Description	Qty	Price	Ext. Price	Labor	Paint
				1		FRONT BUMPER & GRILLE	0	0.00	0.00	0.0	0.0
				2		O/H bumper assy	0	0.00	0.00	4.1	0.0
				3	Repl	Bumper cover w/o prk assist	1	1,022.98	1,022.98	Ind.	2.6
				4		Add for Clear Coat	0	0.00	0.00	0.0	1.0
				5		Add for park sensor	0	0.00	0.00	0.6	0.0
				6		Add for camera	0	0.00	0.00	m	0.2
				7	Repl	LT Upper grille w/o 530e, w/o night vision w/black fins	1	138.45	138.45	Ind.	0.0
				8	Repl	RT Upper grille w/o 530e, w/o night vision w/black fins	1	173.05	173.05	Ind.	0.0
				9	Repl	LT Upper grille w/o 530e, w/o night vision w/black fins	1	138.45	138.45	Ind.	0.0
				10	Repl	RT Upper grille w/o 530e, w/o night vision w/black fins	1	173.05	173.05	Ind.	0.0

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Create Advisor Report in CCC® Estimating, Continued

Procedure,
continued

Step	Action
4	<p>When the Report is ready, the View Report link will display for you to click.</p> <p>If there are any exceptions to the Guidelines, they will appear in the lower half of the screen for you to review.</p> <p>Or, look in the estimate lines. A lightbulb indicator will appear on the specific estimate line that has an exception. Use the mouse to hover over the lightbulb to see the guideline that was triggered.</p>

The screenshot displays the 'Lines' section of an estimate with columns for A, N, O, Est, Line, Oper, Description, Qty, Price, Ext. Price, Labor, and Paint. Line 19 is highlighted in blue and has a lightbulb icon next to it. Below the lines, the 'Advisor' section shows a list of exceptions with columns for Line, Rule Description, Actual \$, Allowable \$, Variance \$, Score, and Parts. A blue circle with the number 4 is placed over the 'View Report' link in the interface.

Line	Rule Description	Actual \$	Allowable \$	Variance \$	Score	Parts
	Minimum of 7 photos required: VIN, license plate, mileage, and 4 corners	0.00	7.00	0.00	11	
	Mileage Not Entered	0.00	0.00	0.00	11	
	The Vehicle Production Date is not entered.	0.00	0.00	0.00	10	
3	Flex additive is not included.	0.00	0.00	0.00	5	
3	Alternate Part Available - Bumper Cover	1,022.98	640.56	382.42	11	Parts
7	Cover car is not included.	0.00	0.00	0.00	5	
14	Insulator retainer or hood insulator clip is not included.	0.00	0.00	0.00	5	
14	Fit of non-OEM parts is not included.	0.00	0.00	0.00	5	
14	Decal or labels is not included.	0.00	0.00	0.00	5	
19	R&L, R&R, or O/H of Headlamp Assy is not included.	0.00	0.00	0.00	5	
19	Fit of non-OEM parts is not included.	0.00	0.00	0.00	5	

5	Correct the exceptions.
6	Lock the estimate.