How to Use Quick Chat

Job Aid Overview	This job ai	d provides an overview of how to access and use Quick Chat.		
Product Overview	This produ consumer licensed f	This product allows carriers to exchange SMS and MMS messages with consumers in real-time and distribute mobile module products they are licensed for.		
Browser Notes	Popups fo continuat order to u	r mycccportal.com need to be enabled to see the session ion popup. Chrome and Edge users should disable throttling in se Quick Chat.		
How to Access Quick	Note: Qui	ck Chat can be accessed in four ways:		
Chat	Access	Action		
	1	The Chat Dashboard link on the left side of the portal will take the user directly to the Ouick Chat dashboard.		
	2	Within Virtual Inspection, a Quick Chat button will appear on the upper right-hand side of the page. This will launch the Quick Chat dashboard and start a chat with the client indicated in the currently viewed claim folder.		
	3	Quick Chat is available on the main page of the CCC Portal by clicking the message icon in the upper right corner and choosing View Quick Chat.		
	4	The Incident Portal drop-down box shows new messages from Active conversations a user follows.		
	lf a Quick	Chat is already open, and another user attempts to open the		

same chat using a different method, a notification that the message is already in use will display.



Quick Chat Dashboard	Q. @ Q. @ nutti ⊁untui saasa isite Inbox (35) 26 ▼	John Smith Carton Q ¹	Benjut Details Files Contact Information + > Introduction
	Customer Infernal	Custoci Informative from started	Questions Contact Questions
	Firstname Lastname 3n General Deniel aget/2000000000000	Convension coherented from SMS to Quick Chat medide	3
	Li Oksam 0 India Verkame In QC QC 2734, DHE(H) Test Ct 3d both QC APTOAMINDA	неру че в солточе зна знои та вре-оч. Лукит зая ни	
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	A GC COLLOGRACY Name following 44 (Converting) CC MIDDLEGLAD	Tetra a suspective and the second sec	
	FOLLOWING CHATS INACTURE CHATS	# III	

Area	Description		
1	The right area lists ongoing conversations.		
2	The middle area has a conversation history and messaging		
	area.		
3	Relevant claim and incident data, as well as templates.		

Quick Chat -Dashboard-Left Panel



Profile	Profile will enable the user to set status, change to manager view, and sign out.
Portal	Portal will open the portal view.



Quick Chat -		
Dashboard-		
Left Panel,		
continued		

Search	Clicking the search icon performs a chat search. There are no obligatory fields to input information into. Search can be performed with or without information in filter bars.
Profile	Profile will enable the user to set status, change to manager view, and sign out. Users can also access My Settings and configure Out of Office settings.
Help	Help will enable connections between the What's New, CCC Learning Center, and Tech Support
New Chat	To initiate a conversation, this memo pad icon will open a message.
Filter	The filter icon allows the user to search messages by using filter categories.
Customer/Internal	Toggle area between Customer/Internal chats. Both show lists of active chats, followed chats, and inactive chats. The login default is always Customer. Active chats are shown with a blue dot to the left of the chat.



Quick Chat – Dashboard – Right Panel	Benjat Details Contact information + - > Introduction - > Questions - > Contact Questions -	Fites	On the rid Scripts, I	ght-hand me Details, and F	nu, a user can see the ïles tabs.
	Scripts	Script ta message identifie user is p	ab enables e template ed prior to t presented v	a user to swit under script. he scripts lis vith a flow lis _{Details}	ch flows and select a The current flow is t. Upon clicking on it, a t. Files
		Cont > >	act Information Contact Inform PMOI Collectio Mobile Module Mobile Module Virtual Inspecti	ation n s Test 1 s Test 2 on	



Quick Chat – Dashboard – Right Panel, continued	Details	The details tab allows the user to look through the Claim information, Contacts, Vehicle, Accident, and Incident.
	Files	Opening the File tab shows files from a chat with the date it was sent. Script Details Files (1) July 30th; 201 July 30th; 201 July 30th; 201 Upon clicking, it opens and allows the user to change the label and add comments. The three dots in the upper right corner allow the user to download a file or view it in a conversation. Image: Script



Initiating a New Chat -Customer



Step	Action			
1	Start a new chat by clicking the left-top corner "new chat"			
2	Choose a consumer or repair facility . A chat with a consumer can be started with the consumer's phone number or Unique identifier (a claim #, incident # or policy #, quote #) or both listed in a drop-down box.			
	Customer Reference ID, etc. Phone Unique Identifier (888) 111-2222 OR Select Claim # Incident # Policy # Quote # Next			
3	If only the Unique identifier has been indicated, a user sees the window shown down below giving an option to choose an existing contact or create a new contact, then click next .			
	Ceo Owner/Insured (630) 111-0050 John Cao Driver (888) 111-2222 New Contact (888) 111-2222 Back Cancel Next			





Quick Chat –	Insurance carriers can initiate a chat to
Repair	talk to Repair Facilities and can
Facility	share/Receive media files/photos.





Repair	Step	Action		
Facility, continued	1	Once user enters Claim#, open chats will be indicated. If an open chat exists, then the user can view the open chat by clicking on the View Chat button.		
	2	Once the user clicks on the view chat button, the System takes the user to the window that follows which has multiple options. The user can click on Go to Chat and the system opens the chat.		
	3	Click on View PDF to read the full transcript of the previous chat.		
	4	If no previous chat exists or only a closed one exists, click the Start Chat button.		

Quick Chat -Insurance carriers can initiate a chat to talk to Financial Institutions. Please note there is no ability to share/receive any media files/photos Lender over Quick Chat with Lenders.

Start New Chat	×
Select the contact type you want to st	art a new chat with.
**	<u>ب</u>
Repair	Financial
Facility	Institution

Step	Action
1	Click the Start New Chat icon, select Financial Institution.
2	Enter the claim number to start the chat
3	Check for an existing chat or start a new one
4	Type the question and send it to Lender. Lenders can also initiate Quick Chat with Carrier.



Conducting Messages

The system pops up the main **chat screen**. The user has the option to enter the message manually or use a template. The templates under Script are pre-canned messages (customized on a company level) that a user can click on rather than manually typing out the message. The client's name, claim number, open date, channel, and conversation history are displayed on the main chat screen at the top.

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Customer Internal		v Introduction
Name1 +1 e ⁴ fid two 05_0000_00		 Hi chat/displaysontastFirstName, His is Rockford with Workflow Insurance Company, How are you doing today?
Name2 Itd hey OC-SUMMONITY	20.000	
Test Nirmal M H H Set Normal GC-SLINKEDNE	We were unable to send the files through SMS chat because of file size limitations. Please click the following limit: https://cccm.page.limit/mit/mdmZIIVWedetxi8 to download your files.	Great! One of our representatives informed me that you would be interested in handling this case over text. Is this correct?
John Smith + 1 e ⁰ 124 ImageReceived gov/321	Rushid Ajusticov 6.55 pr. Test	•
Teet Db 704 22 Oh25 MeRZ	F60008 Adjustment 8.9 pm	Awasome I will be nere to help you through this process. I was sorry to hear about the accident you were involved in. The first thing we need to do is collect one basis information.
Test +1 7/4 99-CHAT-M0001	Meesga	
POLLOWING CHATS	4900	2 Genc spurations
INACTIVE CHAPS		> FNOL Questions

Chat Box

Suggestions	Bockford Adjusterone, 6 min
Name 1	
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Part	Description
Message Area	Type your message. People tag by starting
	the message with @. The tagged individual
	with show in the message in bold.
Attach PDF	Overall limit of 10 MB. Individual file limit of
File/Image	2.2 MB. Images must be JPG/PNG.
Insert Image	Add images
Add a link	Insert or copy a link
Emoji Menu	Insert an emoji



Conducting **Chat Window Top Panel** Messages, continued $Q^3 \propto^1 \cdots$ 1 Consent Received Name 2 2 Incident Status Opened Channel QC-2 August 2, 2021 Mobile Web 📮 Active Hello Welcome to QC Reply Yes to continue and STOP to opt-out. System Mon 3:56 PM

Section	Description
1	 Client's Name and Consent Status
	 Incident # with link to the relevant file (portal claim,
	incident folder). The policy and quote number may also be there as well.
	 Status will indicate if the chat is active or inactive
	 Date the chat was opened
	 Channels include Mobile Apps, SMS, or MMS.
2	Three icons are included:
	 Chat icon for switching between active chats.
	 Members of the chat icon has an option to edit chat
	participants. After clicking on Edit Chat Participants a
	user is presented with the claim parties, and the option to
	change the chat participants.
	• The Ellipsis Icon (three dots) has several menu options:
	Chat Participants, Transfer Chat, Mark No Reply Needed,
	Associate Claim, Close Chat, Start Video Chat, Associate
	Reference, Chat ID, and Incident ID.



Portal Session Expire/Time Out	If the portal session has expired/timed out , then a pop-up will be displayed to the user who is logged in to Quick Chat. Session Timeout Your session is about to timeout due to inactivity. Please select "Stay Signed In" to continue your session. (stay Signed In
Quick Chat – File Exchange Mobile Module	 The File Exchange Mobile Module is only launched when a consumer is communicating with the Insurance carrier via SMS and the file exchanged is more than 2.2MB. The consumer receives File Exchange link in 2 scenarios: When the insurance carrier sends an image/file bigger than 2.2 MB, the system automatically sends out the File Exchange Mobile Module link to the consumer. When the insurance carrier wants the consumer to upload a file bigger than 2.2 MB, then the insurance carrier manually sends out the File Exchange Mobile Module link to the consumer.
	 File Exchange Mobile Module Flow The insurance carrier sends the File Exchange Mobile Module link to the consumer via an SMS message. Consumers can download the received files from the Insurance carrier to their device.







Quick Chat –	Consumers can upload files (Max 10MB) from their device and send them
File Exchange	to the insurance carrier.
Mobile	– File Types – PDF, JPG, PNG
Module,	
continued	Upload Sequence:

Upload Sequence:



