How to Use Quick Chat

Job Aid Overview

This job aid provides an overview of how to access and use Quick Chat.

Product Overview

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 for mycccportal.com need to be enabled to see the session continuation popup. Chrome and Edge users should disable throttling in order to use Quick Chat.

How to Access Quick Chat

Note: Quick Chat can be accessed in **four** ways:

Access	Action
1	The **Chat Dashboard link** on the left side of the portal will take the user directly to the Quick 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.

If 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.

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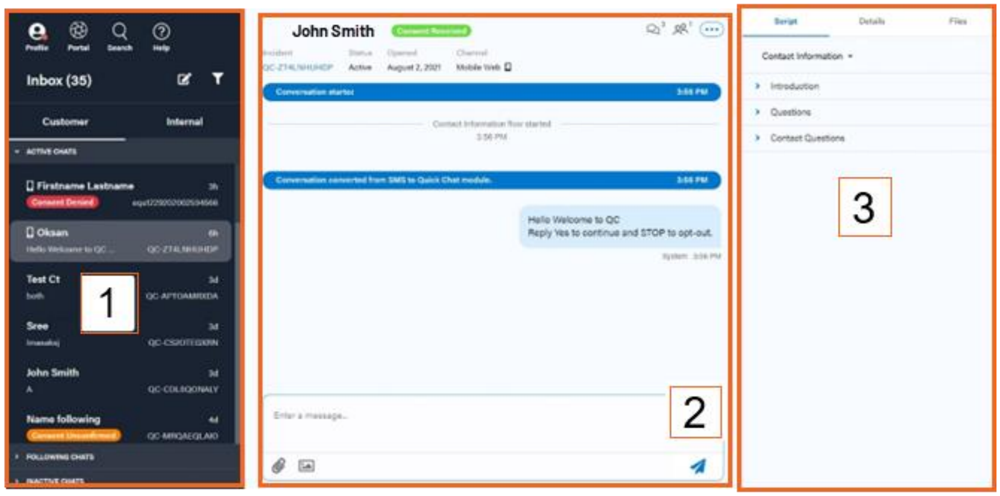
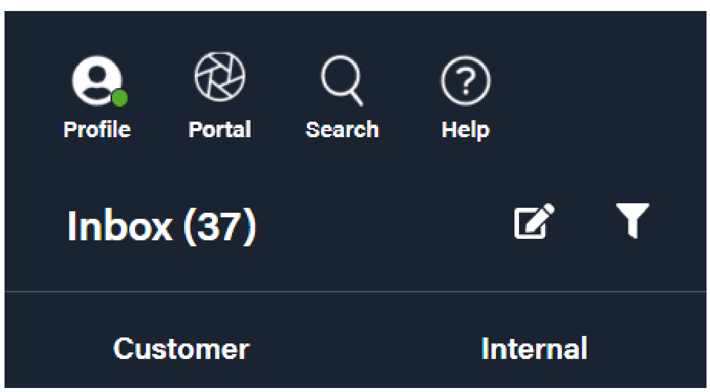
How to Use Quick Chat, Continued

Quick Chat Dashboard



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.

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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.

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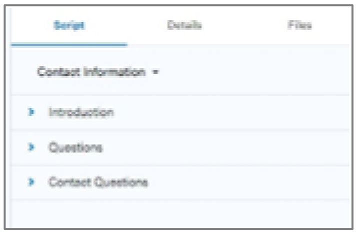
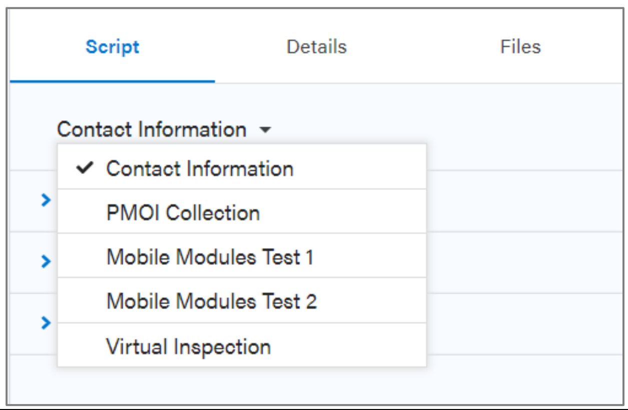
How to Use Quick Chat, Continued

Quick Chat – Dashboard – Right Panel



On the right-hand menu, a user can see the Scripts, Details, and Files tabs.

Scripts	Script tab enables a user to switch flows and select a message template under script. The current flow is identified prior to the scripts list. Upon clicking on it, a user is presented with a flow list. 

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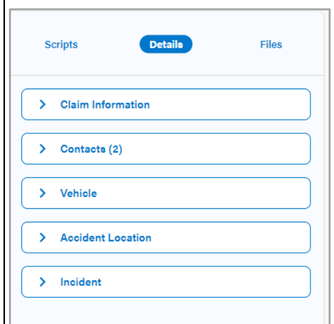
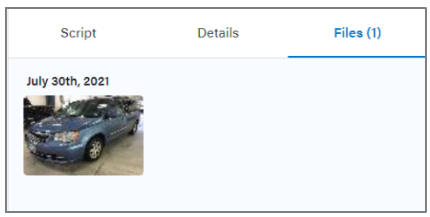
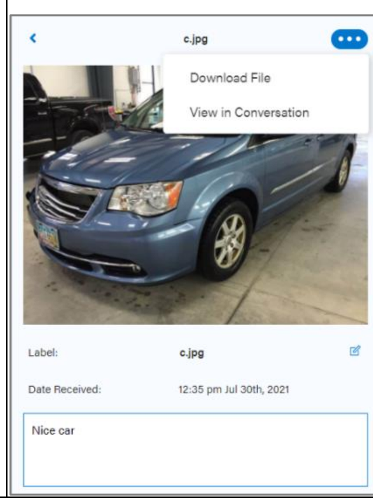
How to Use Quick Chat, Continued

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.  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. 

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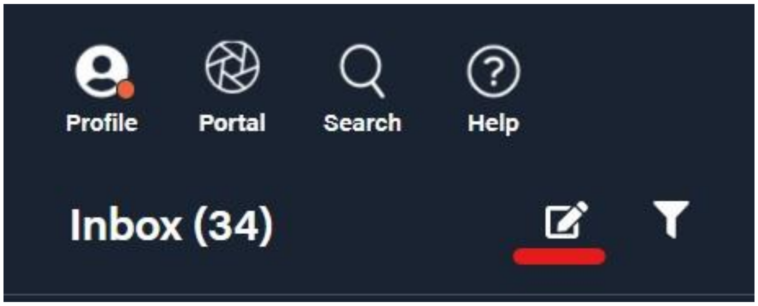
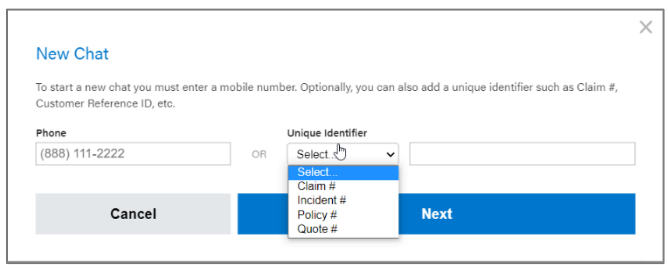
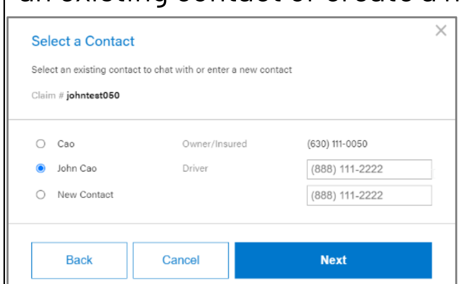
How to Use Quick Chat, Continued

Initiating a New Chat - Customer



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Start a new chat by clicking the left-top corner “new chat” icon.</td></tr>
<tr><td>2</td><td>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.
</td></tr>
<tr><td>3</td><td>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.
</td></tr>
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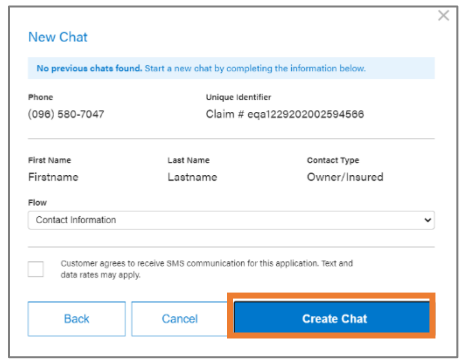
How to Use Quick Chat, Continued

Initiating a New Chat – Customer, continued

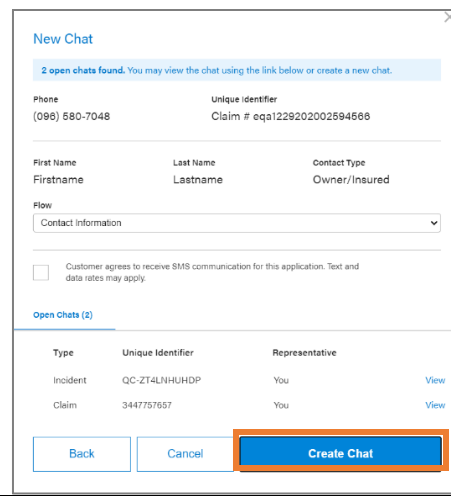
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>

Click the **blue Create Chat** button to get started. For both scenarios, the representative must first confirm the client's consent (with a manual check box) to create a chat. The representative clicks'Create Chat. After that, a client will receive a standard welcome message with an opt-out option as shown below.

New Chat Window (no contact)



New Chat Window (previous contact)



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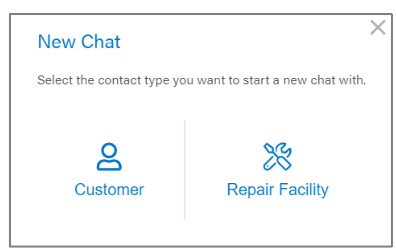
Quick Chat – Repair Facility

Insurance carriers can initiate a chat to talk to **Repair Facilities** and can share/Receive media files/photos.



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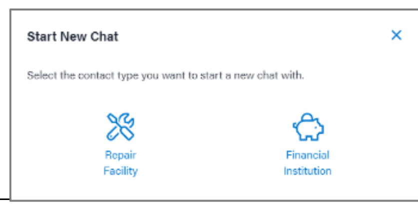
How to Use Quick Chat, Continued

Quick Chat – Repair Facility, continued

Step	Action
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 – Lender

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



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.

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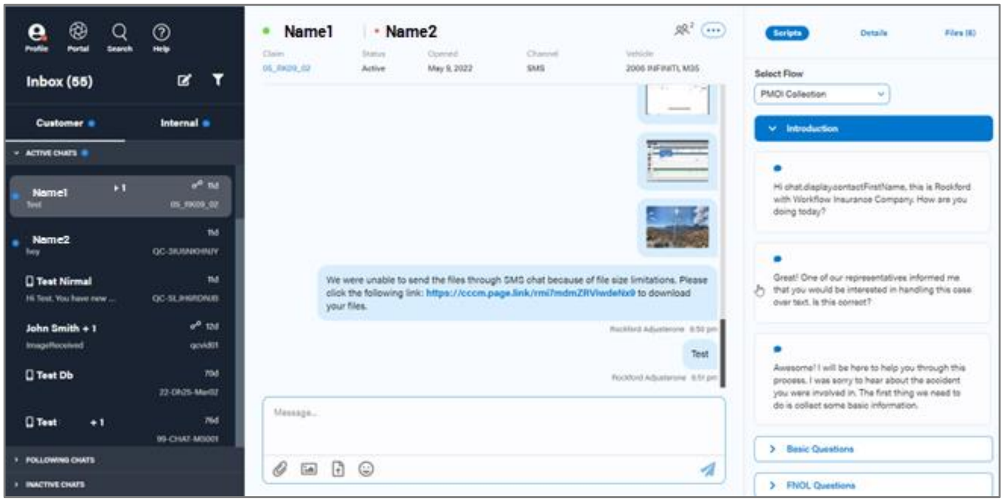
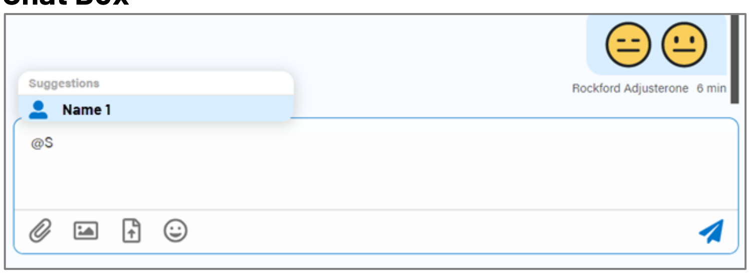
How to Use Quick Chat, Continued

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.



Chat Box



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 File/Image	Overall limit of 10 MB. Individual file limit of 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

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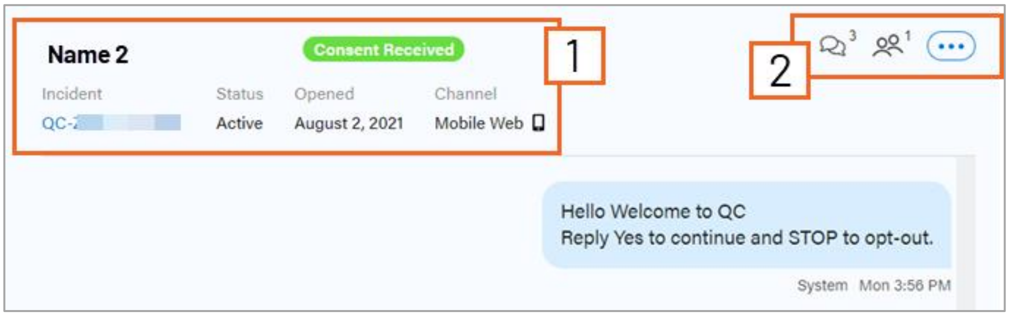
How to Use Quick Chat, Continued

Conducting Messages, continued

Chat Window Top Panel



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.

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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.

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:

1. 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.
2. 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 using the icon in the chat box.

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.

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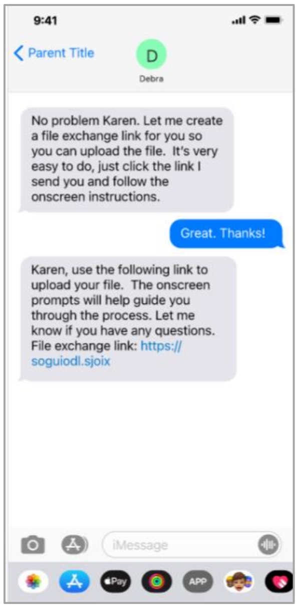
How to Use Quick Chat, Continued

Quick Chat – File Exchange Mobile Module, continued

Download Sequence:

<table>
<tr><th>SMS Link Sent</th><th>Customer Acknowledgment</th><th>Download Files</th></tr>
<tr>
<td>
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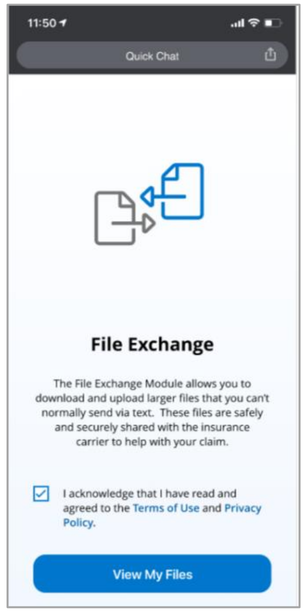
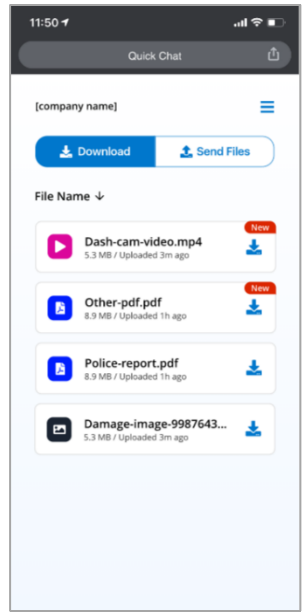
<td>
</td>
<td>
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Quick Chat – File Exchange Mobile Module, continued

Consumers can upload files (Max 10MB) from their device and send them to the insurance carrier.
– File Types – PDF, JPG, PNG

Upload Sequence: