

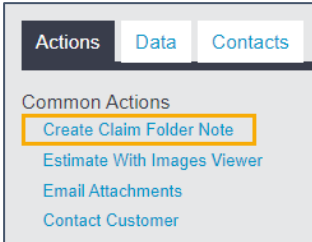
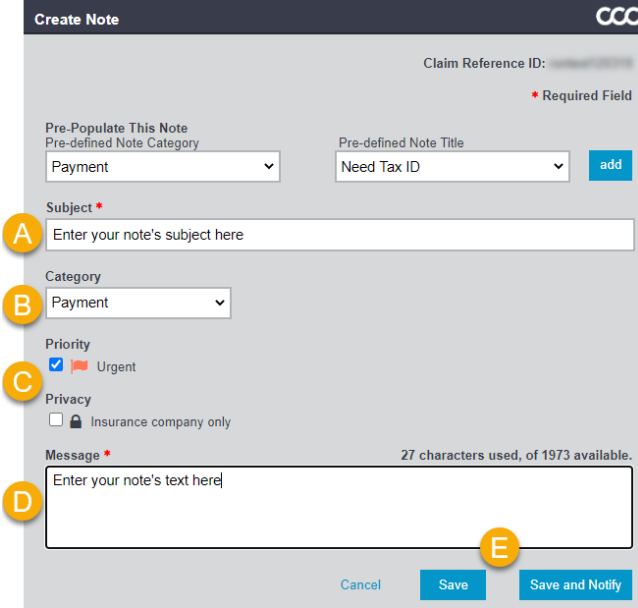
How to Create a Claim Folder Note

Introduction

This job aid describes how to create a Claim Folder Note in the CCC® Portal. There are two ways you can create a Claim Folder Note: from within the Claim Folder or from a Search Results screen.

From the Claim Folder

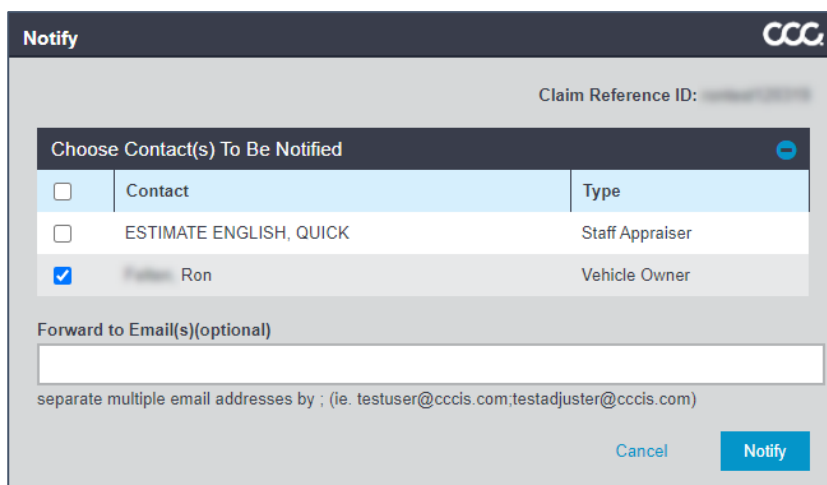
Follow these steps to create a Claim Folder Note from within the Claim Folder.

Step	Action
1	<p>Click the Create Claim Folder Note link under the Common Actions section in the Claim Folder's left side-panel.</p> <p>The Create Note pop-up opens (see Step 2 below).</p> 
2	<p>To create the Note, A) enter a Subject B) select a Category, C) select the Priority and Privacy options, D) compose your Message, and E) click "Save" or "Save and Notify".</p> <p>Required fields are labeled with a red asterisk.</p>  <p>Note: You can use the dropdown menus at the top of the window to select a pre-populated Note Category and/or Note Title. If you click the add button towards the upper right corner, the Subject and Body of the message auto-populate.</p>

Continued on next page


How to Create a Claim Folder Note, Continued

From the Claim Folder,
cont.

Step	Action
3	<p>If you click the "Save and Notify" button pictured in Step 2, the pop-up pictured below opens. To Save and Notify, use the checkboxes in the left column to select the contacts you want to notify.</p> <p>You can also manually enter additional contacts by entering email addresses in the field towards the bottom of the popup (use commas to separate multiple email addresses).</p> <div data-bbox="576 667 1399 1148">  </div> <p>Once you have selected (or entered) all the people you want to notify, click the Notify button. For those associated with the Claim Folder, a notification appears on their CCC Portal homepage in the Messages portlet or the Inbox within the Estimating platform.</p>

From the Search Results Screen

To create a Claim Folder Note from a Search Results screen, click the **Notes** icon (pencil and paper) under the Actions column.

Quick Search for Claim Folders Results										
<input type="checkbox"/>	Claim Reference ID	Assignment Sent ▼	Owner	Total Cost of Repairs	Total Loss	Est	Data	State of Loss	Vehicle	Actions
<input type="checkbox"/>	12/03/2019	12/03/2019	Ron	\$ 0.00	No					
<input type="checkbox"/>	11/12/2019	11/12/2019	Ron	\$ 0.00	No					