

CCC® DMS Activity

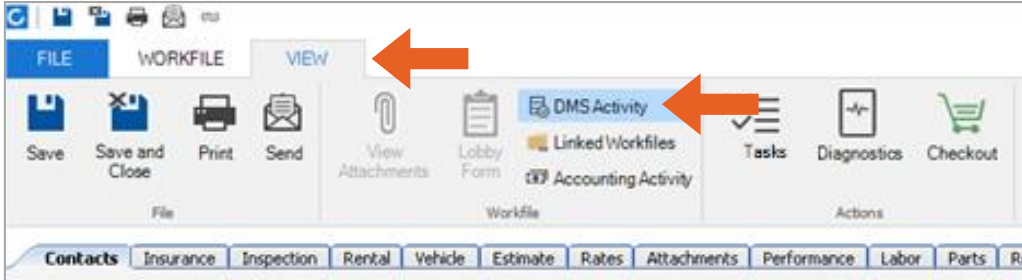
Introduction

The job aid walks the user through adding, viewing, and exporting the **DMS Activity** tasks in **CCC ONE®** Desktop.

Note: The CCC® DMS feature is required and users at the Repair Facility must have appropriate permissions to use the DMS Dashboard.

DMS Activity

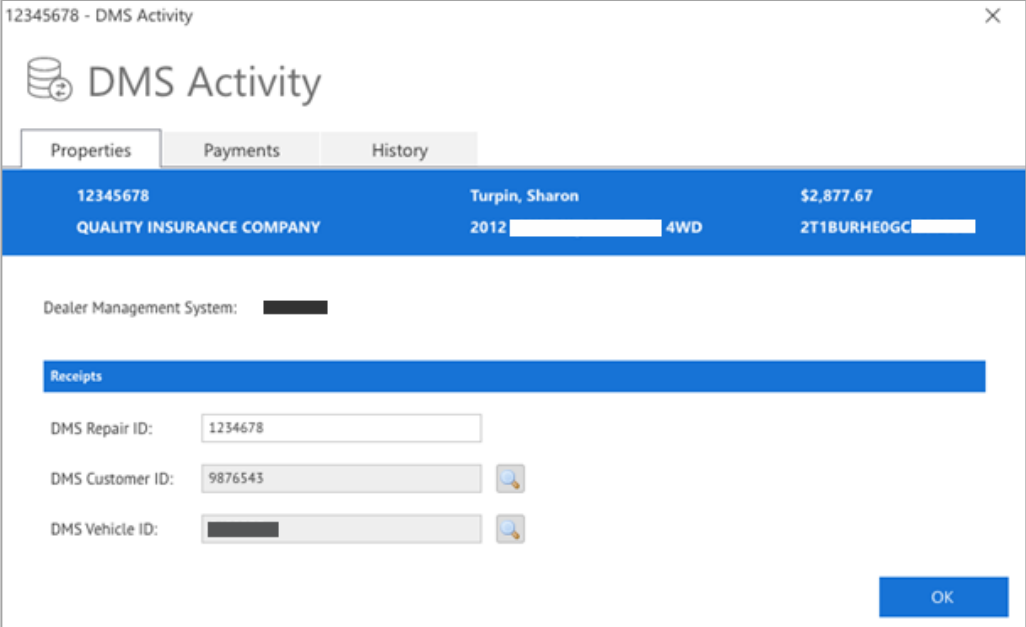
Follow the steps to access the DMS Activity window:

Step	Action
1	<p>Click DMS Activity from the View tab on an open Workfile, the DMS Activity window opens.</p> 

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CCC® DMS Activity, Continued

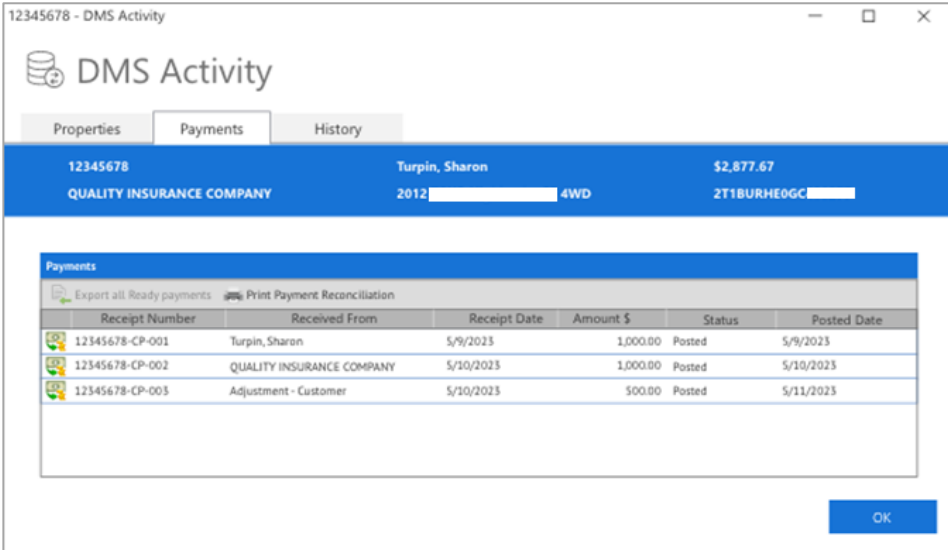
DMS Activity, Continued

Step	Action
2	<p>The Properties tab lists the DMS connection configured for the repair facility, including fields for DMS Repair ID, Customer ID, and Vehicle ID. Add the following Properties details any time before closing the RO:</p> <ul style="list-style-type: none"> • On a Convert to RO, the DMS Repair ID will automatically populate with the reserved repair order number. • Add DMS Customer ID, by selecting the search icon next to the field, then select the matching Customer and click Next. Note: If the results don't match what you need select Customer not listed – export as new customer record. • Add the DMS Vehicle ID, by Select the search icon next to DMS Vehicle ID to initiate a vehicle search. Select the matching vehicle and click Next. Note: If results aren't found select Vehicle not listed – export as new vehicle record, then is prompted selected make/model on the CCC ONE workfile and click Next. <p>Note: If an error occurs in reserving the RO number, or an edit needs to be made, the user may manually input/edit the DMS Repair ID at any time.</p>  <p>The screenshot shows a window titled "12345678 - DMS Activity" with a close button (X) in the top right. The window has a header "DMS Activity" with a database icon. Below the header are three tabs: "Properties" (selected), "Payments", and "History". A blue bar contains the following information: "12345678", "Turpin, Sharon", "\$2,877.67", "QUALITY INSURANCE COMPANY", "2012 [redacted] 4WD", and "2T1BURHE0GC [redacted]". Below this bar is a section for "Dealer Management System:" with a redacted field. A blue bar labeled "Receipts" is below that. There are three input fields: "DMS Repair ID:" with the value "1234678", "DMS Customer ID:" with the value "9876543" and a search icon, and "DMS Vehicle ID:" with a redacted value and a search icon. An "OK" button is in the bottom right corner.</p>

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CCC® DMS Activity, Continued

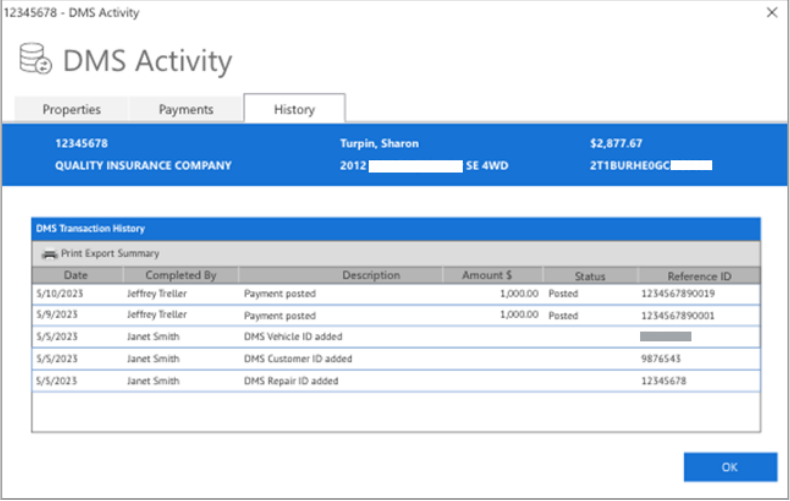
DMS Activity, Continued

Step	Action
3	<p>The Payments tab lists all receipts saved to the workfile, including receipts from Customer, insurance, and adjustment receipts. To export your payments that are ready:</p> <ol style="list-style-type: none"> 1. Click Export all Ready payments. The Exporting payments screen appears, and the receipt detail will begin to be exported. 2. Click Finish. When payments are successfully exported, status changes to Posted and the Posted Date is populated in the Payments screen. Note: If an error message appears follow the prompts to correct the error and try again.  <p>The receipt Status indicates the following:</p> <ul style="list-style-type: none"> • Ready: Saved receipt, not yet exported to DMS. • Posted: Saved receipt that was successfully exported to DMS. • Void: Saved receipt that was later voided. These cannot be exported to DMS. • Failed: Saved receipt that failed export to DMS. User can retry exporting these receipts again.

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CCC® DMS Activity, Continued

DMS Activity, Continued

Step	Action																																				
4	<p>The History tab lists all related events/transactions that occur on the workfile such as when the DMS Repair ID is added.</p>  <p>The screenshot shows the 'DMS Activity' window for workfile 12345678. It has tabs for Properties, Payments, and History. The History tab is active, displaying a table of transactions:</p> <table border="1"> <thead> <tr> <th>Date</th> <th>Completed By</th> <th>Description</th> <th>Amount \$</th> <th>Status</th> <th>Reference ID</th> </tr> </thead> <tbody> <tr> <td>5/10/2023</td> <td>Jeffrey Treiler</td> <td>Payment posted</td> <td>1,000.00</td> <td>Posted</td> <td>1234567890019</td> </tr> <tr> <td>5/9/2023</td> <td>Jeffrey Treiler</td> <td>Payment posted</td> <td>1,000.00</td> <td>Posted</td> <td>1234567890001</td> </tr> <tr> <td>5/5/2023</td> <td>Janet Smith</td> <td>DMS Vehicle ID added</td> <td></td> <td></td> <td></td> </tr> <tr> <td>5/5/2023</td> <td>Janet Smith</td> <td>DMS Customer ID added</td> <td></td> <td></td> <td>9876543</td> </tr> <tr> <td>5/5/2023</td> <td>Janet Smith</td> <td>DMS Repair ID added</td> <td></td> <td></td> <td>12345678</td> </tr> </tbody> </table>	Date	Completed By	Description	Amount \$	Status	Reference ID	5/10/2023	Jeffrey Treiler	Payment posted	1,000.00	Posted	1234567890019	5/9/2023	Jeffrey Treiler	Payment posted	1,000.00	Posted	1234567890001	5/5/2023	Janet Smith	DMS Vehicle ID added				5/5/2023	Janet Smith	DMS Customer ID added			9876543	5/5/2023	Janet Smith	DMS Repair ID added			12345678
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