

CCC® DMS Activity

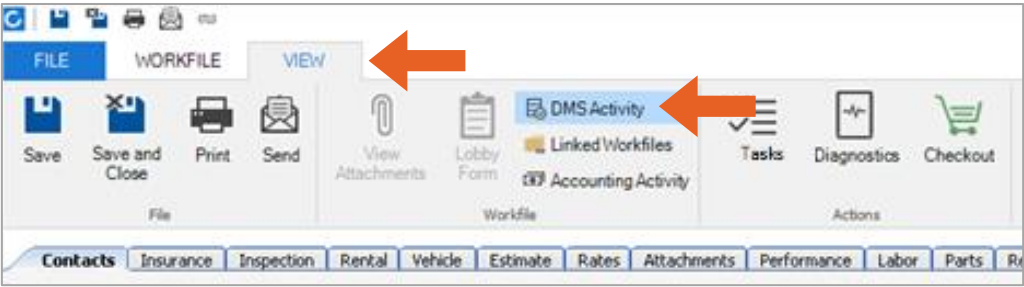
Introduction

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

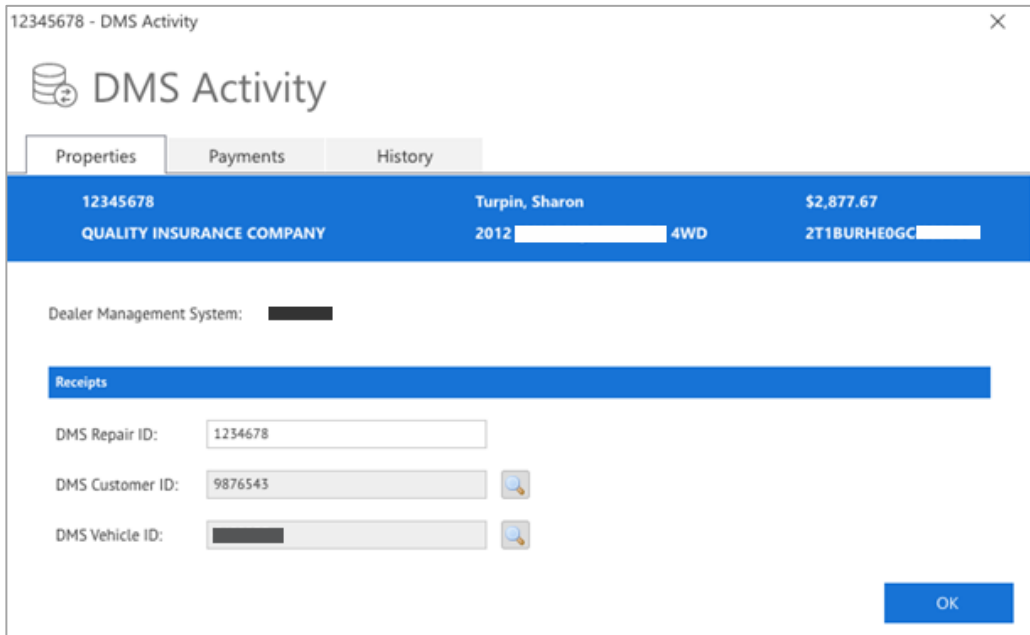
Follow the steps to access the DMS Activity window:

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

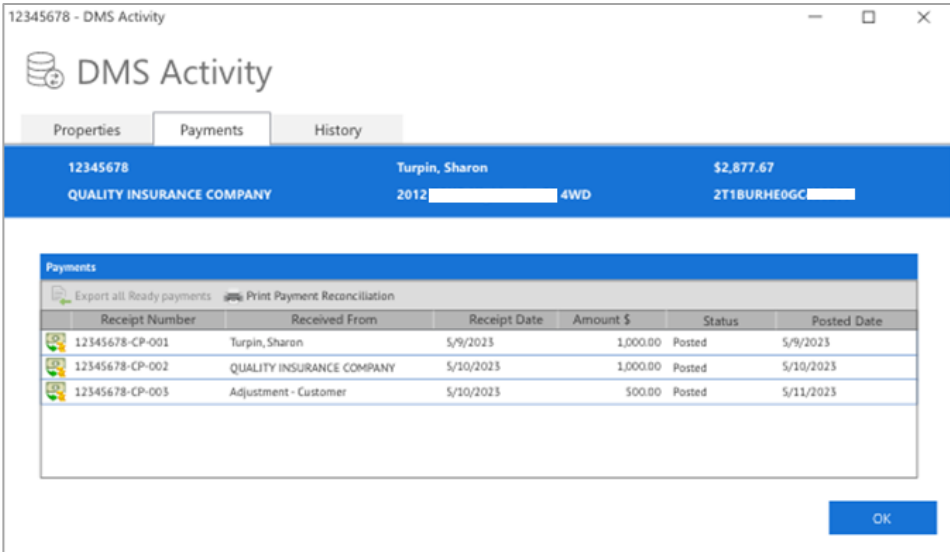
Step	Action
2	<p>The Properties tab lists the DMS connection configured for the repair facility, including fields for DMS Repair ID, Customer ID, and Vehicle ID. Add the following Properties details any time before closing the RO:</p> <ul style="list-style-type: none"> On a Convert to RO, the DMS Repair 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> 

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CCC® DMS Activity, Continued

DMS Activity, Continued

Note: Payments export function may not be available, depending on your DMS partner. Though payments/receipts will be listed in the payments section of the DMS Activity window, attempting to export payments will not result in any payments related data being transferred to your DMS.

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

4

The **History** tab lists all related events/transactions that occur on the workfile such as when the DMS Repair ID is added.

Action

12345678 - DMS Activity

DMS Activity

Properties

Payments

History

12345678

Turpin, Sharon

\$2,877.67

QUALITY INSURANCE COMPANY

2012 SE 4WD

2T1BURHE0GC

DMS Transaction History

Print Export Summary

Date	Completed By	Description	Amount \$	Status	Reference ID
5/10/2023	Jeffrey Trelter	Payment posted	1,000.00	Posted	1234567890019
5/9/2023	Jeffrey Trelter	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

OK