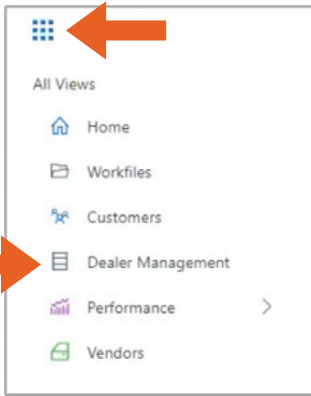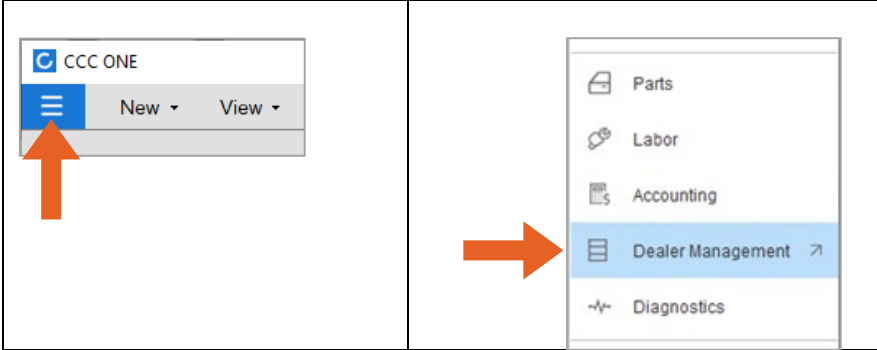# CCC® DMS Dashboard

Introduction	The Dealer Management System (DMS) Dashboard allows you to manage exceptions and ensure the DMS is properly synced. **Note:** The CCC® DMS feature is required and users at the Repair Facility must have appropriate permissions to use the DMS Dashboard.

|	
Access the DMS Dashboard	The DMS Dashboard can be accessed directly from **cccone.com** or from **CCC ONE®** desktop application by following the steps below:

Platform	Description
From **cccone.com**	Click the **menu** icon, then select **Dealer Management**.
From **CCC ONE®**	Click the **menu** icon, then select **Dealer Management.** This will open a new browser window that takes you to the DMS Dashboard. **Note:** CCC ONE Version 41 or later required.

CCC® DMS Dashboard, Continued

|	
Dealer Management Dashboard	The **Dealer Management Dashboard** displays your Payments Ready to Export and Exceptions in two categories **Payments** and **Repair Orders**. As each exception is resolved, it will be removed from the list of exceptions for each category.
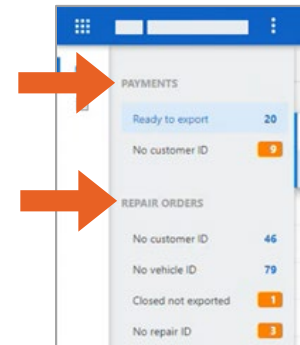
Payments

The payments section has two subcategories: **Ready to Export** and **No Customer ID**.

- **Ready to export**
  - This section shows payments have all the necessary elements and reporting in CCC and are ready to be exported to your DMS provider.
  - The payment can then be exported from the dashboard, by selecting a customer from the list, then selecting **Export Payment** from the flyout menu. **Note:** The Export Payment feature may not be available based on your DMS provider.
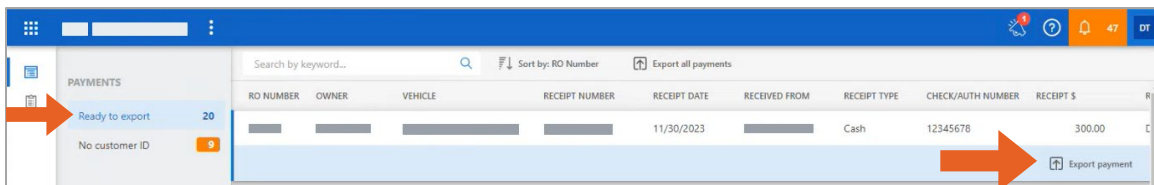
- **No customer ID**
  - This section shows repair orders with saved receipts, but no DMS Customer ID is associated with the workfile.
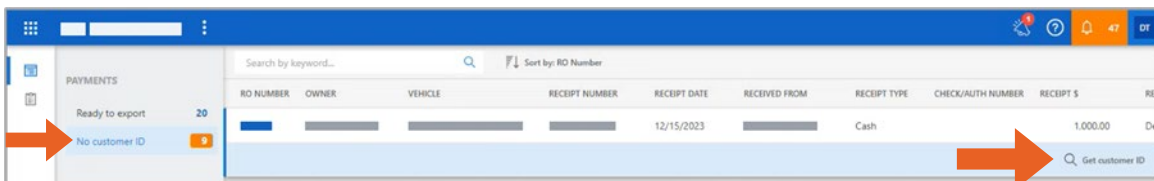
- To add a Customer ID to the workfile, start by selecting a customer from the list, then select **Get Customer ID** at the bottom right. Next, a **Get customer ID** pop-up will open with the possible matches displayed, select the desired Customer.
- After selecting the desired customer click **Next** and the workfile will update.
- The customer will now appear in the **Ready to export** section.
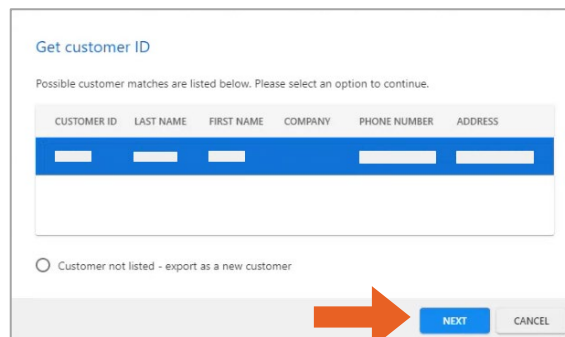
Note: If a customer is not found select **Customer not listed – export as new customer**. The Customer ID can also be found on the DMS Payments flyout menu in CCC ONE® desktop.

Continued on next page

Dealer Management
Dashboard, Continued

Repair Orders
The repair order section includes four subsections: **No customer ID**, **No Vehicle ID, Closed by not Exported**, and **No Repair ID**.

- **No customer ID**
  - This section shows repair orders without a DMS customer ID associated with the workfile.
  - **Note:** Resolving the **No customer ID** in the **Payments** category will also resolve it here in the **Repair Orders** category if it exists through the same process of selecting **Get customer ID** from the flyout menu.
- **No vehicle ID**
  - This section shows Repair Orders without a DMS vehicle ID associated with the workfile.
  - The Vehicle ID can be added by accessing the vehicle ID match from the existing DMS activity window in CCC ONE® desktop.

    *See the **DMS Activity** job aid for a walkthrough.*

- **Closed not exported**
  - This section shows Repair Orders that have not been exported to the DMS. This is typically repair orders that have been closed out and routed to, then rejected by your DMS provider.
  - This can be resolved by selecting the Customer from the list, then selecting **Open Workfile** from the flyout menu. The web workfile opens, then review and make the necessary changes.

CCC® DMS Dashboard, Continued

Dealer Management
Dashboard, Continued

<u>**Repair Orders**</u> *(continued)*

- **No repair ID**
    - o Includes repair orders without a DMS repair ID associated with the workfile.
    - o To resolve this, you may need to start over with a new RO. **Important:** Creating a new Repair Order (RO) is required to address issues with RO's that are missing Repair IDs.
    - o New RO creation is required to resolve RO's with no repair IDs.

Note: This category will not appear if there are not any ROs with no repair IDs.