## **CCC® DMS Dashboard**

The Dealer Management System (DMS) Dashboard allows you to manage Introduction exceptions and ensure the DMS is properly synced.

> Note: The CCC  $^{\odot}$  DMS feature is required and users at the Repair Facility must have appropriate permissions to use the DMS Dashboard.

Access the	The DMS Dashboard can be accessed directly from <b>cccone.com</b> or from <b>CCC</b>
DMS	<b>ONE</b> <sup>®</sup> desktop application by following the steps below:
Dashboard	

Platform	Description											
From <b>cccone.com</b>	Click the menu icon, then select Dealer Management. All Views All Views Workfiles Customers Dealer Management Performance											
From <b>CCC ONE</b> ®	Click the <b>menu</b> icon, then select <b>Dealer Management</b> . This will open a new browser window that takes you to the DMS Dashboard.											
	Note: CCC ONE Version 41 or later required.											

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## 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**

**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 dashboard, attempting to export payments will not result in any payments related data being transferred to your DMS.

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

- Ready to export
  - o 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.

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		Search by ke	yword		Q	₹↓ Sort by: RO Number	Export all payments							
PAYMENTS		RO NUMBER	OWNER	VEHICLE		RECEIPT NUMBER	RECEIPT DATE	RECEIVED FROM	RECEIPT TYPE	CHECK/AUTH NUMBE	R REC	EIPT \$		R
Ready to export	20	_					11/30/2023		Cash	12345678		300.0	00	ε
No customer ID	9											↑ Export	payment	

## No customer ID

 This section shows repair orders with saved receipts, but no DMS Customer ID is associated with the workfile.

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			Search by keyword	Q	₩↓ Sort by: RO Number						
	PAYMENTS		RO NUMBER OWNER	VEHICLE	RECEIPT NUMBER	RECEIPT DATE	RECEIVED FROM	RECEIPT TYPE	CHECK/AUTH NUMBER	RECEIPT 5	REC
	Ready to export	20		_	_	12/15/2023		Cash		1.000.00	De
7	No customer ID									Get custor	ner ID

Get customer ID

- 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.

CUSTOMERID	LAST NAME	FIRST NAME	COMPANY	PHONE NUMBER	ADDRESS
	-			-	
Customer no	t listed - export	as a new custo	mer		

o 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.



## CCC® DMS Dashboard, Continued

### **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 0 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.

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	DAVAGENTS		Search b	y keyword		Q	F Sort by: RO Number						
Ê	PAYMENTS			RO NUMBER	OWNER		VEHICLE	INSURANCE	CLAIM NUMBER	ESTIMATOR	VEHICLE IN	VEHICLE OUT	RO ESTIM.
	Ready to export	20	-										5:
	No customer ID	9	-		_					-			
	REPAIR ORDERS												1
	No customer ID	46											
	No vehicle ID	79		_				_					25
	Closed not exported		•										2.1
	No repair ID	<b>3</b>	<b>**</b>	_									9:

- **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.

			Search b	y keyword		Q	₹↓ Sort by: RO Number							
1	PAYMENTS			RO NUMBER	OWNER		VEHICLE	INSURANCE	CLAIM NUMBER	ESTIMATOR	VEHICLE IN	VEHICLE OUT	RO E	STIMA
- I	Ready to export	20			_					_				
	No customer ID												D Open wor	rkfile
	REPAIR ORDERS	-									_			
	No customer ID	46												
	No vehicle ID	79												
	Closed not exported													
	No repair ID													

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# CCC® DMS Dashboard, Continued

## **Dealer Management**

Dashboard, Continued

#### **Repair Orders** (continued)

- No repair ID •
  - Includes repair orders without a DMS repair ID associated with the workfile. 0
  - To resolve this, you may need to start over with a new RO. **Important:** Creating a new 0 Repair Order (RO) is required to address issues with RO's that are missing Repair IDs.
  - New RO creation is required to resolve RO's with no repair IDs. 0

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			Search b	y keyword		Q	F↓ Sort by: RO M	Number					
Ê	PAYMENTS			RO NUMBER	OWNER		VEHICLE	INSURANCE	CLAIM NUMBER	ESTIMATOR	VEHICLE IN	VEHICLE OUT	RO ESTIMATI
	Ready to export	20						_					
	No customer ID	D 🧕			-	-	_	-		_			-
	REPAIR ORDERS		7				_						
	No customer ID	46											
	No vehicle ID	79											
	Closed not exported												
	No repair ID												

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

