

Job Aid: Parts Maintenance & Appraiser Level Groups

Purpose

Advisor Parts Sourcing (APS) includes a Parts Maintenance feature on mycccportal.com. Use it to set up and maintain zones, suppliers, and appraiser groups for aftermarket/recycled parts offered in CCC ONE® Insurance Estimating.

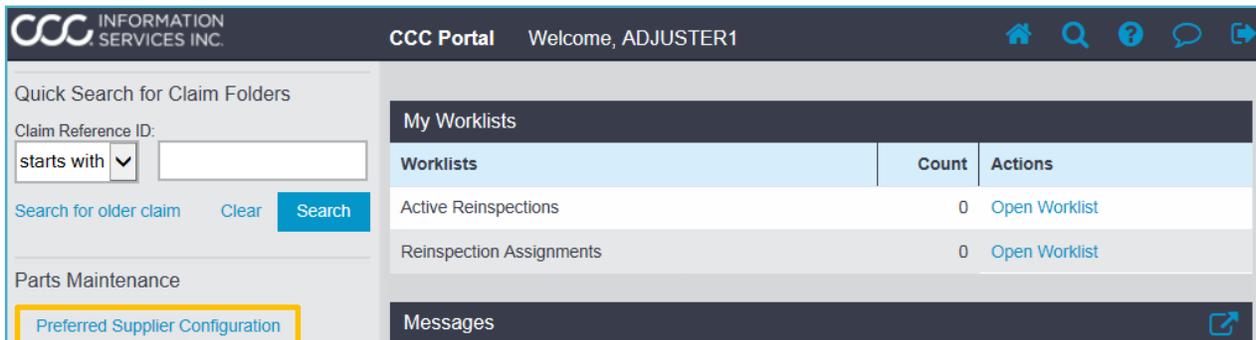
This document includes the following sections:

- Global Settings
- Zone Level Supplier Preferences
- Appraiser Group Level Supplier Preferences

Parts Maintenance Worklist

If you are designated to set up and maintain parts, suppliers and appraiser groups for APS, you will see a worklist called **Parts Maintenance** on the left panel of your Portal Home Page.

Click on **Preferred Supplier Configuration** to begin.



The screenshot shows the CCC Portal interface. At the top, it says 'CCC INFORMATION SERVICES INC.' and 'CCC Portal Welcome, ADJUSTER1'. On the left, there is a 'Quick Search for Claim Folders' section with a 'Claim Reference ID' field set to 'starts with' and a 'Search' button. Below that is the 'Parts Maintenance' section, where 'Preferred Supplier Configuration' is highlighted with a yellow box. On the right, there is a 'My Worklists' table with two rows: 'Active Reinspections' and 'Reinspection Assignments', both with a count of 0 and an 'Open Worklist' link. Below the table is a 'Messages' section with an external link icon.

Worklists	Count	Actions
Active Reinspections	0	Open Worklist
Reinspection Assignments	0	Open Worklist

Parts Maintenance Overview

Parts Maintenance has three sections. Each section controls a different aspect of setting up parts and suppliers for your appraisers. CCC ONE Estimating does not allow appraisers to set up a Preferred Supplier List for their unit. **Preferred**, **Approved**, and **Never Use** suppliers are set up here, then sent to the appraiser's unit.

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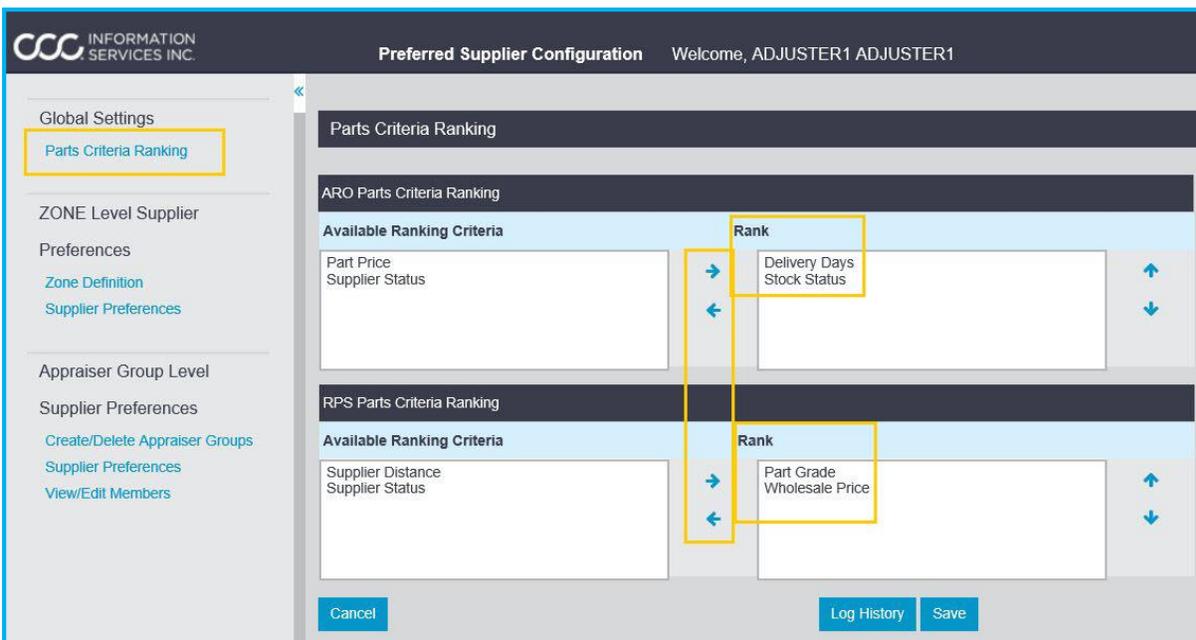
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Global Settings

Parts Criteria Ranking

Parts Criteria Ranking is a Global Setting that effects all selections for Parts Maintenance.

Use **Parts Criteria Ranking** to set the priority of your sorting criteria on the server-side. The Sort order that you save here is used to sort parts found when using Locate Parts prior to those parts being sent to CCC ONE Estimating.



There are specific ranking types for ARO and for Recycled parts. Move the criteria available under **Available Ranking Criteria**, using the arrow (><) keys to select or deselect the Criteria. This means not only which to use when Ranking but also in what order. Once you select the rankings and the Order, click **Save** to save your changes. When no ranking is selected, a default Ranking Criteria is applied to sort the Parts in Locate Parts. The default order is:

- **ARO Default Ranking:** Supplier Status, Part Price, Delivery Days, and Stock Status.
- **Recycled Default Ranking:** Part Grade, Supplier Distance, Wholesale Part Price, and Supplier Status.

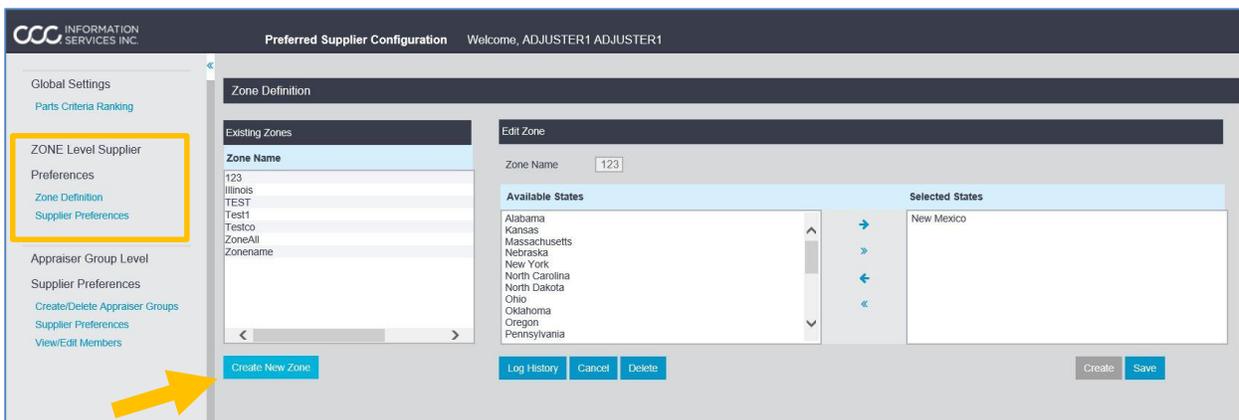
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Zone Level Supplier Preferences

Zone Definition

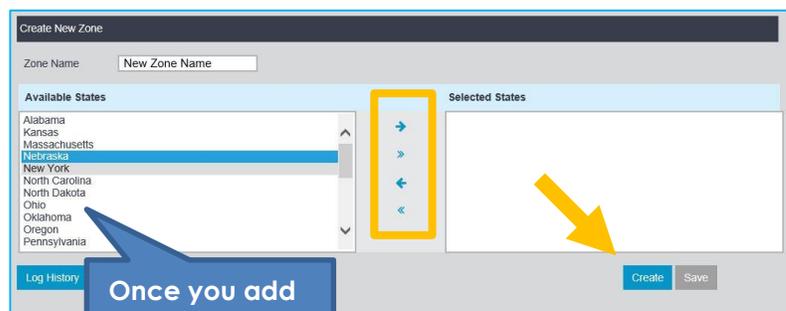
Your company's **Zone Definitions** can be set up by state. Zones represent the geographical areas in which Preferred, Approved, and Never Use suppliers can be uniquely established. Zones can be used as a search criterion on the Supplier Preferences screen. See Supplier Preferences in the next section for more information.



Click the **Create New Zone** button and then enter the **Zone Name**. The **Create** button becomes available. Click on one or multiple states as displayed under Available States and use the right directional arrow to add it to the Selected States list.

Tip! All states can be added at once by clicking the >> button or all states can be removed by clicking the << button.

Once finished, click the **Create** button to add the new Zone. Repeat this process until all Zones are defined.

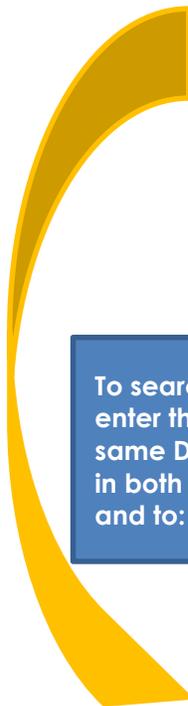


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Supplier Preferences

Supplier Preferences allows you to search for suppliers and update the supplier status to **Approved**, **Preferred** or to **Never Use**. Only Suppliers that deliver to that Zone are displayed by default. Recyclers that do not provide Zip Codes they deliver to, are displayed if they are located within 200 miles from each of the Zones selected.



To search a, enter the same Date in both from: and to:

To search a single Zip Code, enter the same Zip Code in both from: and to:

To begin, select the **Zone(s)** to display.

Use checkboxes to select one or more Zones. Click **Select Zone(s)** to add them to the Preferences Search.

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Supplier Preferences, continued

Next, select your search filtering criteria to narrow down your results. Criteria include:

- **Part Type Sold:** Includes Locations that sell any one or more of the Part Types selected.
- **Delivery Area Zip Code Range:** Includes Locations that deliver into any one or more Zip Codes within the Range. Recyclers that do not provide their delivery Zip Codes are included IF they are located in the Range or within 200 miles of the Range.
- **Date Last Modified:** Includes Locations that with any modifications between the Dates selected. Examples:
 - ARO Supplier Location created
 - Existing ARO Supplier Location deleted
 - Recycler Yard created
 - Existing Recycler Yard set to Active or Inactive
 - Preference Status changed on ARO Location or Recycler Yard by a User
- **State(s) Delivered Into:** Includes Locations that deliver into any one or more States selected.
- **Supplier Status**
- **Preference Record Status:** Status of Supplier Record listed in the search results. It is NOT the status of the Supplier in the system. The Supplier Record can be marked Inactive when:
 - Supplier Location retracts deliver out of the Zone
 - Supplier Location is deactivated when an ARO is deleted. The Record will automatically become Active when the Supplier updates their delivery Zip Codes or choose Active with the same Preferences selected previously.
- **Supplier Location**
- **Supplier Name**

Click on a Location Name in the Search Results to see what modifications were made.

Recyclers that do not provide delivery Zip Codes are included if located in or within 200 miles of the States selected.

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Supplier Preferences, continued

Once you select your search criteria, click **Search**. The list of Suppliers that deliver to the selected zone(s) display.

The results display below the criteria. Use the radio buttons to select **Supplier Status (Preferred, Approved or Never Use)** and then click **Save Preferences**.

Search/Configure Zone Level Supplier Preferences

Zone(s) selected*

123, Illinois, TEST, Test1, Testco...

Select Zone(s)

Filter search results by:

Clear all Filters Search

Export to Excel Cancel Save Preferences

Zone	Supplier Name	Location Name	Location Address	City	State	Zip Code	Part Type	Preferred	Approved	Never Use
1 Illinois	#1 Morgan Highway / #1 Morgan Highway Auto P	400 Morgan Highway	Scranton PA 60654 Recycled	Scranton	PA	60654	Recycled	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
2 Test1	#1 Morgan Highway / #1 Morgan Highway Auto P	400 Morgan Highway	Scranton PA 60654 Recycled	Scranton	PA	60654	Recycled	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
3 Zonename	#1 Morgan Highway / #1 Morgan Highway Auto P	400 Morgan Highway	Scranton PA 60654 Recycled	Scranton	PA	60654	Recycled	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
4 Illinois	1-800-Radiator & AC	1-800-RADIA	LOMBARD IL 60148 Aftermarket	LOMBARD	IL	60148	Aftermarket	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
5 Illinois	1-800-Radiator & AC	1-800-RADIA	SCHAUMBURG IL 60193 Aftermarket	SCHAUMBURG	IL	60193	Aftermarket	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
6 Illinois	1-800-Radiator & AC	1-800-RADIA	MEMPHIS TN 38134 Aftermarket	MEMPHIS	TN	38134	Aftermarket	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
7 Illinois	1-800-Radiator & AC	1-800-RADIA	YEADON PA 19050 Aftermarket	YEADON	PA	19050	Aftermarket	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
8 Illinois	1-800-Radiator & AC	1-800-RADIA	SKOKIE IL 60076 Aftermarket	SKOKIE	IL	60076	Aftermarket	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
9 Illinois	1-800-Radiator & AC	1-800-RADIA	COLUMBUS OH 43228 Aftermarket	COLUMBUS	OH	43228	Aftermarket	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
10 Illinois	1-800-Radiator & AC	1-800-RADIA	BALTIMORE MD 21230 Aftermarket	BALTIMORE	MD	21230	Aftermarket	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Preferred & Never Use Suppliers

Before leaving Supplier Preferences, we need to take a moment to discuss **Preferred** and **Never Use** Suppliers.

Preferred Suppliers are used as a priority ranking when locating parts while estimating.

Never Use Suppliers will not be shown when locating parts in estimating. See the section on Priority Ranking in the next section for more information. The system will use these selections when offering parts on the appraiser's unit in CCC ONE.

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Log History

You may noticed a **Log History** button on both the Parts Ranking and Zone Definition screens.

Log History

Change Log History			
	Change	Changed On	Changed By
1	Zone 123 created with states :[New Mexico]	Mon, 12 Oct 2015 02:32 PM	adjccct@ccc1 (ADJUSTER1 ADJUST123
2	Zone Illinois changed from [Arkansas, Connecticut, Delaware, Illinois, Maine, Maryland, Mississippi, Missouri, Montana, Nevada, New Hampshire, New Jersey] to [Arkansas, Connecticut, Delaware, Illinois, Maine, Maryland, Mississippi, Missouri, Montana, Nevada, New Hampshire, New Jersey, Michigan]	Mon, 12 Oct 2015 02:32 PM	adjccct@ccc1 (ADJUSTER1 ADJUST1Illinois
3	Deleted Zone tests	Mon, 12 Oct 2015 02:03 PM	adjccct@ccc1 (ADJUSTER1 ADJUST1tests
4	Deleted Zone Test123	Mon, 12 Oct 2015 02:03 PM	adjccct@ccc1 (ADJUSTER1 ADJUST1Test123
5	Zone tests created with states :[Massachusetts]	Mon, 12 Oct 2015 01:45 PM	adjccct@ccc1 (ADJUSTER1 ADJUST1tests
6	Zone Testco created with states :[California]	Mon, 12 Oct 2015 10:53 AM	adjccct@ccc1 (ADJUSTER1 ADJUST1Testco
7	Deleted Zone TestLog	Wed, 7 Oct 2015 10:03 AM	adjccct@ccc1 (ADJUSTER1 ADJUST1TestLog
8	Deleted Zone TESTaqw	Wed, 7 Oct 2015 10:02 AM	adjccct@ccc1 (ADJUSTER1 ADJUST1TESTaqw

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When you click this button, a Change Log History pop window displays. Here you can see what was changed, when and who changed it.

If a change is longer than can be displayed, you can hover over it to see the full details.

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Appraiser Group Level Supplier Preferences

Appraiser Group Level Supplier Preferences Overview

Appraiser Group Level
Supplier Preferences
[Create/Delete Appraiser Groups](#)
[Supplier Preferences](#)
[View/Edit Members](#)

Appraisers can also be formed into Groups that have specific supplier preferences set. This is particularly useful when appraisers need to have access to suppliers across zones. **Important!** Appraiser Group preferences supersede Zone Preferences when an Appraiser is part of a Group.

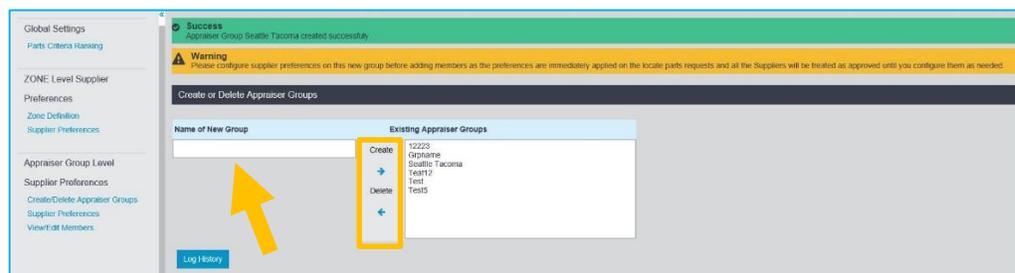
There are three steps for creating an Appraiser Group and adding appraisers to that group. They are:

1. Create/Delete Appraiser Groups
2. Supplier Preferences
3. View/Edit Members

It is VERY important that you perform the steps in order. Why? When Groups are created, all suppliers are added as **Approved** until you set the Preferred & Never Use preferences. Appraisers will see the effect of the supplier preferences as soon as they are added and saved to the Group. Therefore, it is important to set those preferences BEFORE adding appraisers to that Group. Let's see how this works.

Step #1: Create Appraiser Group

Click on **Create/Delete Appraiser Group**. Enter the name of the new **Appraiser Group**. **Important!** You must use a unique Name.



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Step #2: Search Suppliers

Click on **Search Suppliers**. Here you select the **Group Name** you just created in the previous step. Click on the **Part Types** you want to search.

To add Aftermarket (ARO) Suppliers, search by the **State or Zip Code** they deliver to, or, by that Supplier's **Location**. Click **Submit**.

The list of suppliers will display. Select **Preferred** and **Never Use** suppliers. Click **Save** to add them to the Group.

Group	Supplier Name	Location Name	Location Address	City	State	Zip Code	Part Type	Preferred	Approved	Never Use
1	Seattle Tacoma 1-800-Radiator & AC	1-800-800-2108	EDDYSETT WOL TRN Ave SE	Edwett	WA	98208	Aftermarket	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	Seattle Tacoma 1-800-Radiator & AC	1-800-800-2108	32200 PACIFIC HWY E, Suite E	PFPE	WA	98414	Aftermarket	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Seattle Tacoma 1-800-Radiator & AC	1-800-800-2108	1111 N VISTA ROAD UNIT 3D	SPOKANE	WA	99210	Aftermarket	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Seattle Tacoma 1-800-Radiator & AC	1-800-800-2108	3473 39th Street Avenue	PORTLAND	OR	97210	Aftermarket	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	Seattle Tacoma 1-800-Radiator & AC	1-800-800-2108	310 SOUTH 340 AVENUE	YAKIMA	WA	98902	Aftermarket	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	Seattle Tacoma 1001 Best Auto Care Dist	1001 Best Auto Care Dist	Commerce Lakes Dr	Fort Myers	FL	33913	Aftermarket	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Tip! For this example in Seattle/Tacoma, you would search for suppliers located in all the surrounding states.

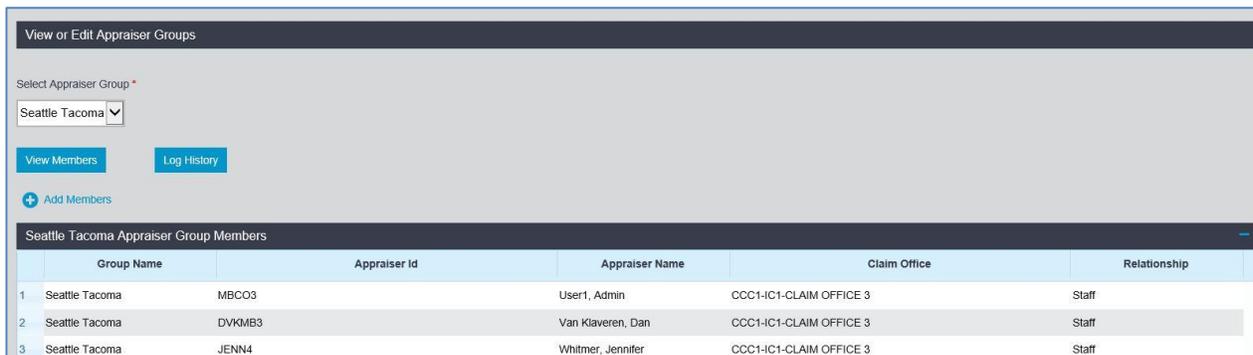
Now you can see all of the suppliers in your new Group and update the Preferred or Never Use suppliers as needed. You can also search for a specific supplier or export the list to Excel.

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Step #3: View/Edit Members

Now it's time to add appraisers to this new Group. Click **View/Edit Members**. Select the **Appraiser Group** and then click **View Members**. This is a new Group, so no appraisers display.



The screenshot shows a web interface titled "View or Edit Appraiser Groups". At the top, there is a header bar with the title. Below the header, there is a section for "Select Appraiser Group" with a dropdown menu currently set to "Seattle Tacoma". Below the dropdown are two buttons: "View Members" and "Log History". There is also a "+ Add Members" link. Below this section is a table titled "Seattle Tacoma Appraiser Group Members". The table has five columns: "Group Name", "Appraiser Id", "Appraiser Name", "Claim Office", and "Relationship". There are three rows of data in the table.

	Group Name	Appraiser Id	Appraiser Name	Claim Office	Relationship
1	Seattle Tacoma	MBCO3	User1, Admin	CCC1-IC1-CLAIM OFFICE 3	Staff
2	Seattle Tacoma	DVKMB3	Van Klaveren, Dan	CCC1-IC1-CLAIM OFFICE 3	Staff
3	Seattle Tacoma	JENN4	Whitmer, Jennifer	CCC1-IC1-CLAIM OFFICE 3	Staff

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Step #3: View/Edit Members, continued

Click on **Add Members**. Search by **Appraiser ID**, **Appraiser Name** or **Claim Office**. Enter a search term and click **Search**. The results display as shown below. **Important!** Appraisers can ONLY be in ONE Appraiser Group.

Once you have added members, click **Save** to finish the Group. Click the **X** to close the Search Appraiser window.

Search and add Members to Seattle Tacoma Appraiser Group

Search Criteria*:

Appraiser ID Appraiser Name Claim Office ccc1

Clear Search

Cancel Save

Select Appraisers to add to Group

	Appraiser Id	Name	Group	Claim Office	Relationship	Select
1	USER1	Johnson, User1	Test5	CCC1-IC1-OFFICE1	Staff	<input checked="" type="checkbox"/>
2	KDMB3	Dhandapani, Kavitha	Test5	CCC1-IC1-CLAIM OFFICE 1	Staff	<input checked="" type="checkbox"/>
3	RWMB3	Wiesman, Randy	Test5			<input type="checkbox"/>
4	WPIS1	Pisarcek, Windy	Test5			<input checked="" type="checkbox"/>
5	JHMB3	Hermann, Jason	Test5			<input checked="" type="checkbox"/>

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Appraisers in this Group will automatically begin receiving information for these suppliers.

View or Edit Appraiser Groups

Select Appraiser Group
Seattle Tacoma

View Members Log History

+ Add Members

Seattle Tacoma Appraiser Group Members

	Group Name	Appraiser Id	Appraiser Name	Claim Office	Relationship
1	Seattle Tacoma	MBCO3	User1, Admin	CCC1-IC1-CLAIM OFFICE 3	Staff
2	Seattle Tacoma	DVMB3	Van Klaveren, Dan	CCC1-IC1-CLAIM OFFICE 3	Staff
3	Seattle Tacoma	JENN4	Whitmer, Jennifer	CCC1-IC1-CLAIM OFFICE 3	Staff