

Scheduling Settings – Administrator

Overview

When setting up the CCC® Scheduling tool, the Scheduling Settings need to be configured. This job aid covers various settings available to Administrators.

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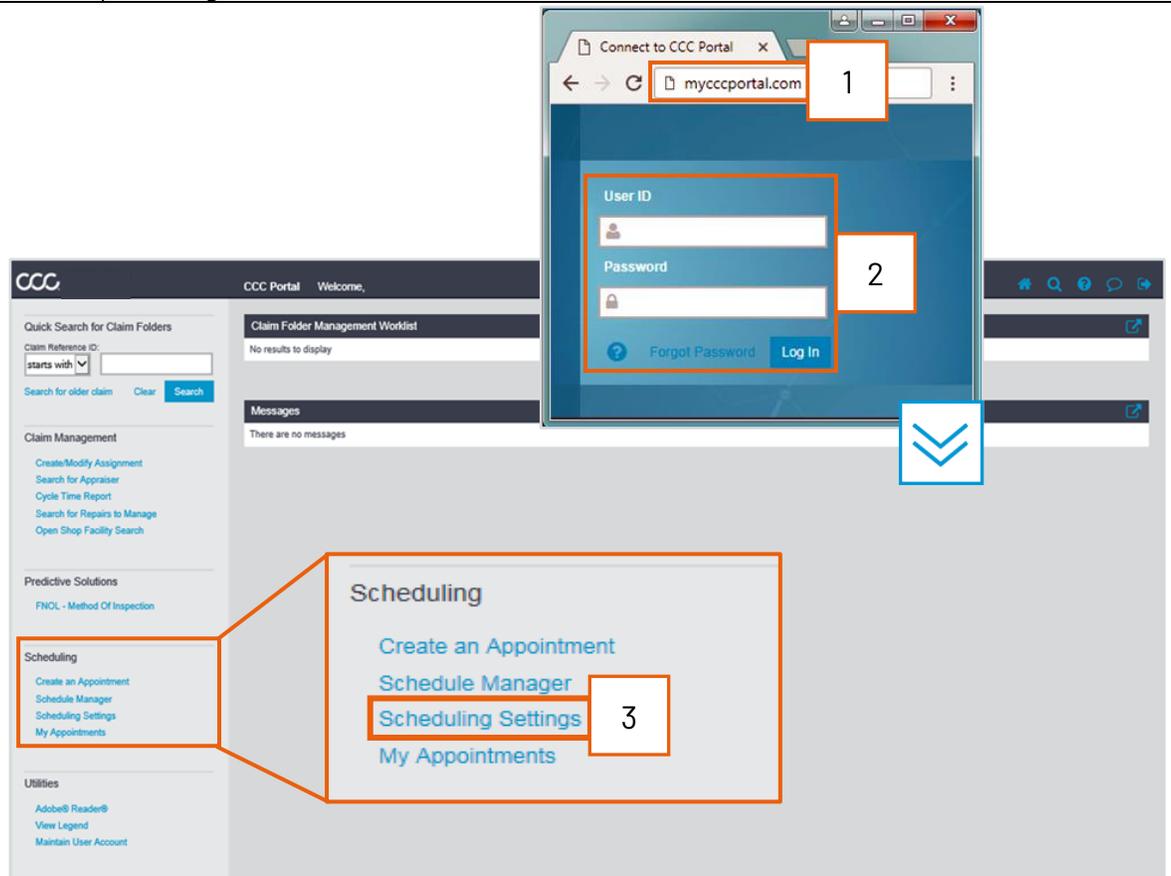
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Scheduling Settings – Administrator, Continued

Accessing Scheduling Settings

To access Scheduling Settings, log into the CCC Portal using the following steps:

Step	Action
1	Open Internet Explorer and go to mycccportal.com .
2	Enter your User ID and Password and click on Log In . The CCC Portal Home page opens, where you can navigate in Scheduling.
3	In the Scheduling section on the portal home page, select the Scheduling Settings link.



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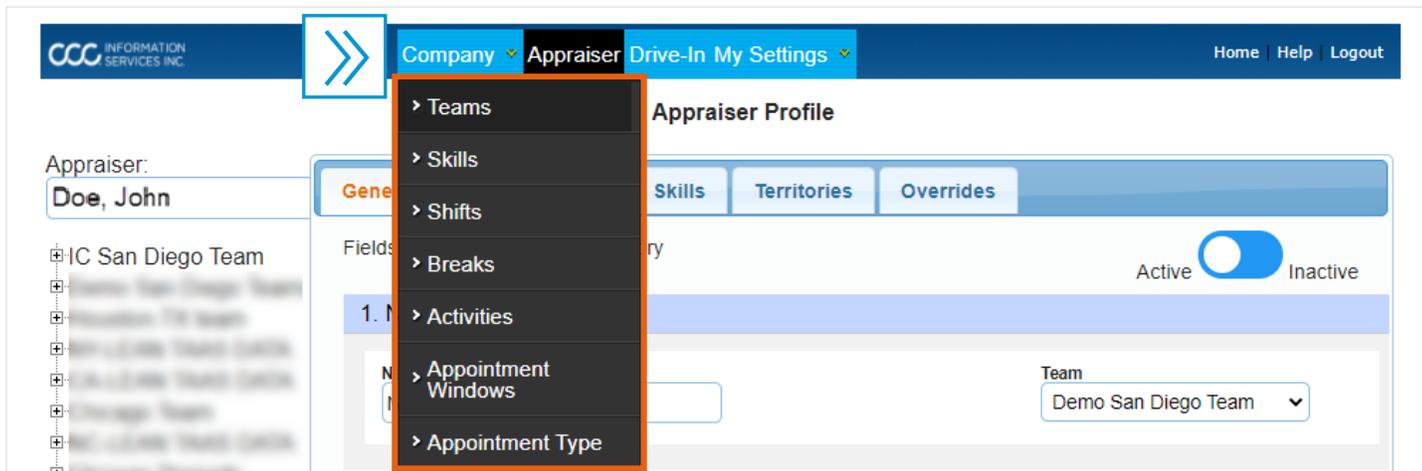
Scheduling Settings – Administrator, Continued

Company Tab

The Scheduling Settings page opens. Company setup includes setting up teams, skills, shifts, lunch break/Holidays, Company allowed activities, appointment windows and appointment types.

To create the settings, select the **Company** tab which displays the following:

- Teams
- Skills
- Shifts
- Breaks
- Activities
- Appointment Windows
- Appointment Type



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Scheduling Settings – Administrator, Continued

Company Tab,
continued

Teams

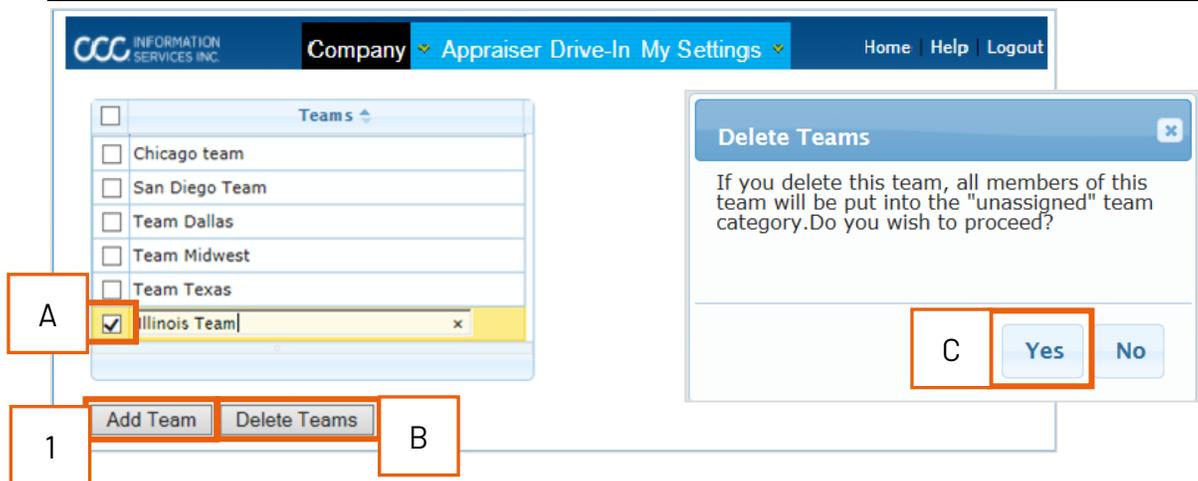
Adding teams to your company helps you group people for specific locations, teams, and more. For example, you can create a team for an office in a specific city. To edit teams select **Teams** from the Company drop-list then use the following:

To add the teams at a company level, use the following step:

Step	Action
1	Select the Add Team button to create a new Team. Then type a team in the field and press Enter .

To remove a team at company level, use the following steps:

Step	Action
A	Select the checkbox next to the team. You can select the checkbox in the Teams header to select <i>all</i> teams at once. 
B	Select Delete Teams .
C	Select Yes to confirm the deletion or No to cancel.



My Teams

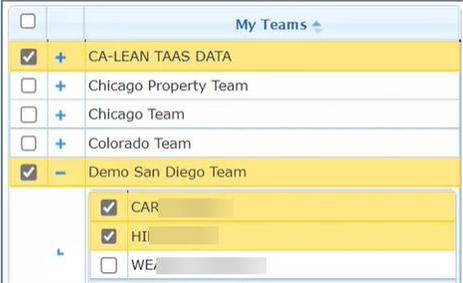
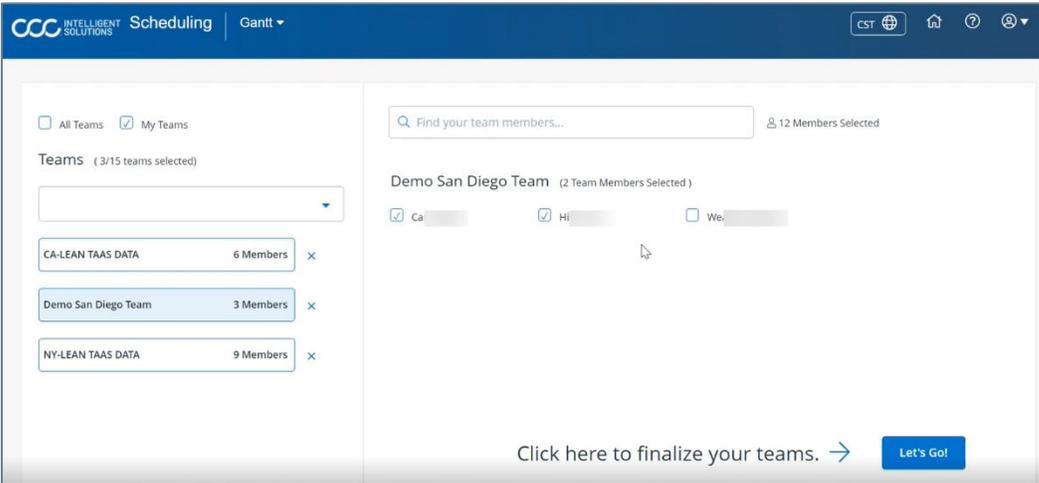
My Teams is a function that allows the user to select and unselect appraisers within their Teams. Follow the steps below to use the My Teams function:

Step	Action
1	Click on My Settings , then select My Teams . 

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Scheduling Settings – Administrator, Continued

Company Tab,
continued

Step	Action
2	<p>Your Teams will display. Here you can select and deselect Teams and appraisers.</p>  <p>Note: Only the appraisers that are selected will be displayed in Gantt view.</p>
3	<p>Within Gantt view, you may also select and unselect appraisers for My Teams.</p> 
4	<p>To finalize your Teams, click on the Let's Go! button.</p> 
5	<p>A new window will display asking to confirm and save your selected appraisers. Click Save.</p> 

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Scheduling Settings – Administrator, Continued

Company Tab,
continued

Select/Deselect All Team Members

Use the **Select/Deselect All** checkbox to select all or no team members.



Skills

Selecting skills for an appraiser helps decide who is appropriate for a specific job. For example, an appraiser who does not have a skill relating to heavy equipment will never be assigned a job that requires that specific skill.

To add the skill at a company level, use the following 2 steps:

Step	Action	
1	Select Skills from the Company drop-down list.	
2	Select the Add button and enter the skill.	Press Enter to save it.

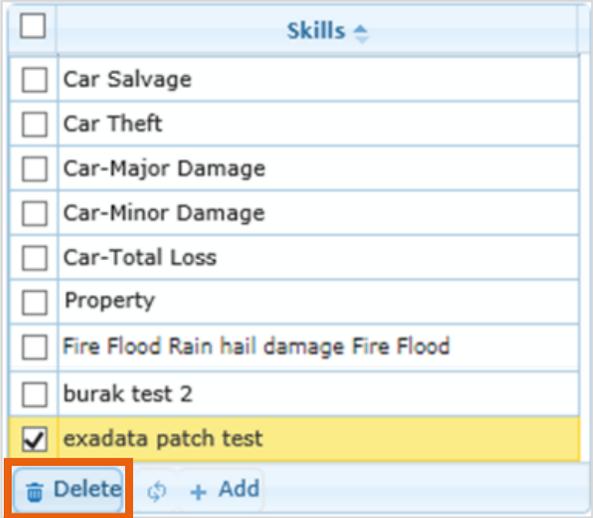
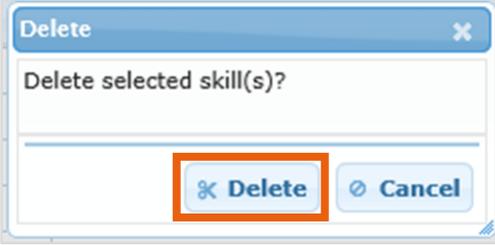
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Scheduling Settings – Administrator, Continued

Company Tab,
continued

Skills (continued)

To delete a skill at the company level, use the following 2 steps:

Step	Action
1	<p>Place a check mark in the box next to the Skill and click Delete.</p> 
2	<p>After selecting Delete, a confirmation pop up will appear. Select Delete to delete the skill, or Cancel to cancel deleting.</p> 

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Scheduling Settings – Administrator, Continued

Company Tab,
continued

Shifts

Adding, Updating, and Deleting Shifts

The Shifts section in the company drop down contains all of the possible shifts that can be applied to an appraiser. This helps the scheduling tool determine which appraiser is available to cover a specific appointment. The Shift specifics can be seen when the plus sign next to a specific shift is selected.

Adding a Shift

To add a shift, use the following 4 steps:

Step	Action
1	Select Shifts from the Company drop-down.
2	Select the Add button.  The screenshot shows the 'Add, Edit or Delete Shifts' interface. At the top, there is a header with the CCC logo and 'INFORMATION SERVICES INC.' on the left, and 'Company' and 'Appraiser Drive-In My Settings' on the right. Below the header is a table with the following rows: - Row 1: A checkbox, a plus sign, and the text 'Shift Name' with a dropdown arrow. - Row 2: A checkbox, a plus sign, and the text '24 hour shift'. - Row 3: A checkbox, a plus sign, and the text 'shift02'. At the bottom of the table are three buttons: 'Delete' (with a trash icon), '+ Add' (with a plus icon and highlighted by a red box), and 'Cancel' (with a left arrow icon).

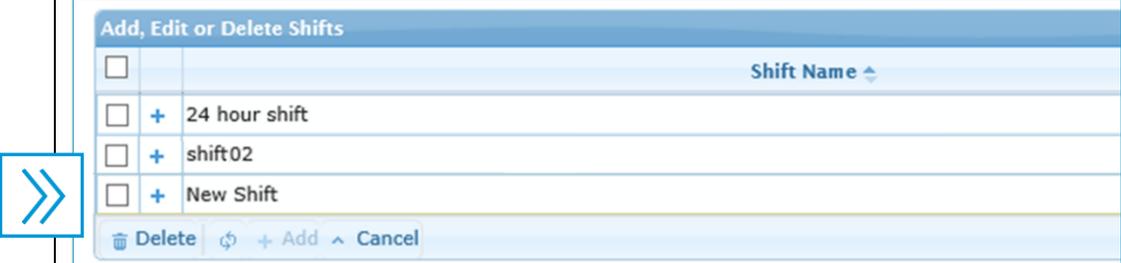
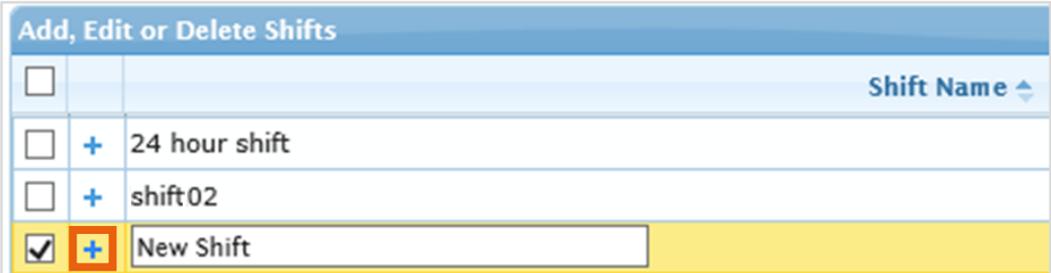
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Scheduling Settings – Administrator, Continued

Company Tab,
continued

Shifts (continued)

Adding a Shift

Step	Action
3	<p>Add the Shift name in the open field. Press Enter to accept changes. The shift now appears in the list.</p>  <p>The screenshot shows a table with a header 'Add, Edit or Delete Shifts' and a 'Shift Name' column. Below the header, there are three rows: '24 hour shift', 'shift02', and 'New Shift'. Each row has a checkbox and a plus sign. The 'New Shift' row is highlighted in yellow. At the bottom, there are buttons for 'Delete', '+ Add', and '^ Cancel'.</p>
4	<p>Select the Plus sign next to the name to add shift details for each day.</p>  <p>The screenshot shows the same interface as in step 3, but the 'New Shift' row is now selected, and the plus sign next to it is highlighted with a red box. The 'New Shift' row is highlighted in yellow.</p>
5	<p>When you're done, select Save to update the new shift details.</p>  <p>The screenshot shows a table with a header 'New Shift' and a table with columns 'Day', 'Shift Start', 'Shift End', 'Break (mins)', 'Earliest Break Start', and 'Latest Break End'. The 'Save' button is highlighted with a red box.</p>

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Scheduling Settings – Administrator, Continued

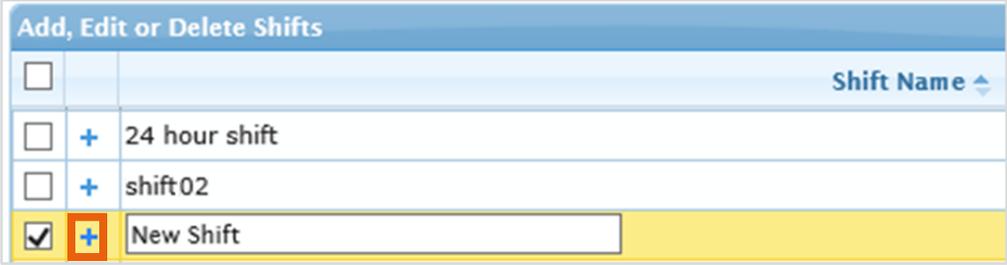
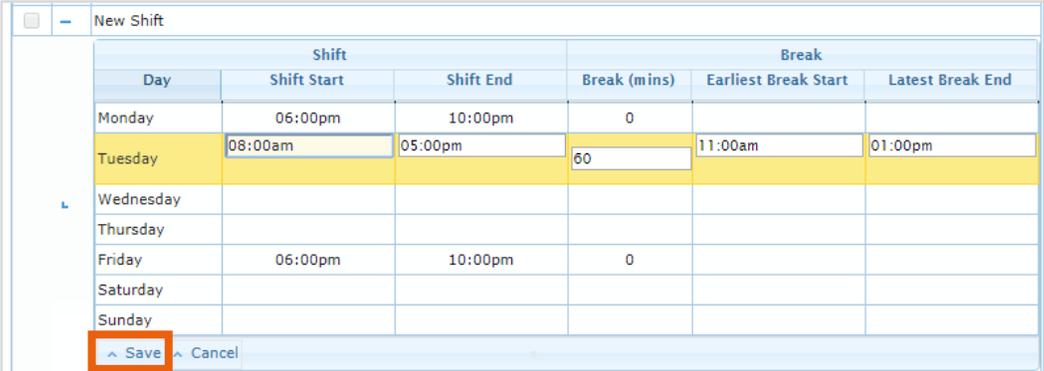
Company Tab,
continued

Shifts (continued)

Updating a Shift

Once a Shift is built in the settings, the shift can be updated. Use the following steps to edit an existing shift.

To update a shift, use the following 2 steps:

Step	Action
1	<p>From the Shifts section in the Company tab, click the plus sign next to the shift that needs to be edited.</p> 
2	<p>Select a day to make shift changes in the appropriate effected field, when finished click Save.</p> 

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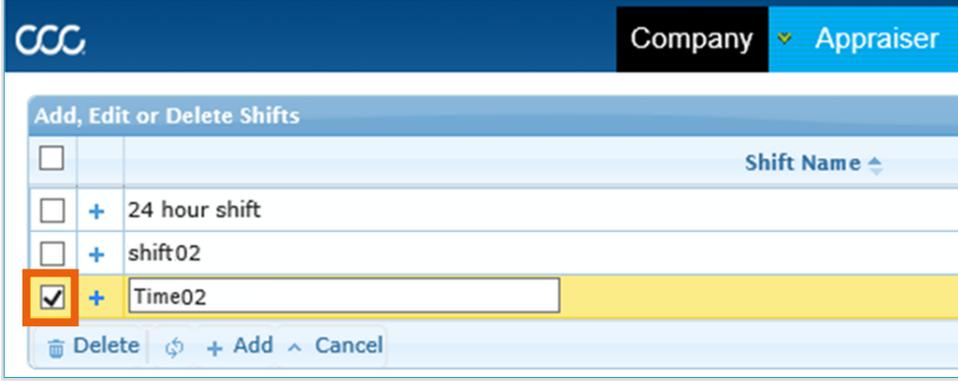
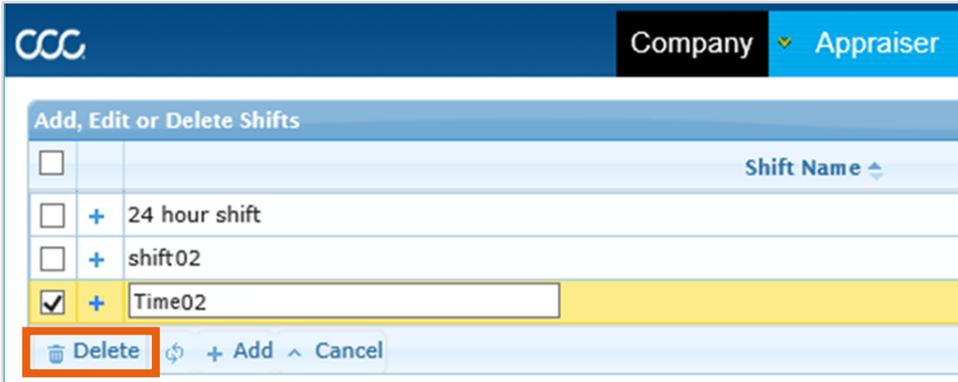
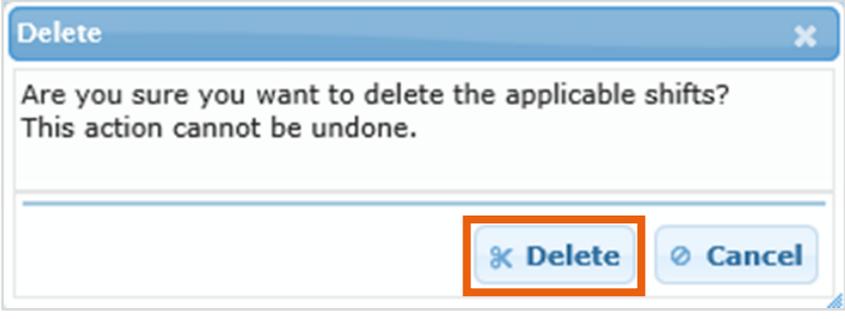
Scheduling Settings – Administrator, Continued

Company Tab,
continued

Shifts (continued)

Deleting a Shift

To delete a shift in the company settings, use the following 3 steps:

Step	Action
1	<p>Place a check mark in the box next to the shift needing deletion.</p> 
2	<p>Select the Delete button.</p> 
3	<p>A confirmation pop-up window will appear. To delete, click Delete, to cancel the deletion, click Cancel.</p> 

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Scheduling Settings – Administrator, Continued

Company Tab,
continued

Activities

Adding activities to your company helps you block off time for non-claim related activities. To edit activities select **Activities** from the Company drop-list then use the following:

To add Activities, use the following 3 steps:

Step	Action
1	Select Add Activities .
2	Enter an activity in the field.
3	Press Enter to save the activity.

The screenshot shows the 'Activities' section of the Scheduling Settings. The top navigation bar includes the CCC logo, 'INFORMATION SERVICES INC.', and a 'Company' dropdown menu. Below the navigation bar, there is a list of activities with checkboxes. The 'Research' activity is selected. At the bottom of the list, there are two buttons: 'Add Activity' and 'Delete Activities'. A red box labeled '1' highlights the 'Add Activity' button, and another red box labeled '2' highlights the 'Research' activity row.

Note: To Delete an activity select the checkbox next to the activity and click the **Delete Activities** button, a confirmation window will appear click **OK**.

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Scheduling Settings – Administrator, Continued

Company Tab,
continued

Company appointment window The following 6 appointment windows are supported in Scheduling. You can apply the appointment windows from scheduling settings and the appointment windows will be available in appointment search.

1 Hour

1 hour

<input type="checkbox"/>	Start Time
<input type="checkbox"/>	07:00
<input type="checkbox"/>	08:00
<input type="checkbox"/>	09:00
<input type="checkbox"/>	10:00
<input type="checkbox"/>	11:00
<input type="checkbox"/>	01:00
<input type="checkbox"/>	02:00
<input type="checkbox"/>	03:00
<input type="checkbox"/>	04:00

2 Hours

2 hours

<input type="checkbox"/>	Start Time	End Time
<input type="checkbox"/>	07:00am	09:00am
<input type="checkbox"/>	09:00am	11:00am
<input type="checkbox"/>	11:00am	01:00pm
<input type="checkbox"/>	01:00pm	03:00pm
<input type="checkbox"/>	03:00pm	05:00pm
<input type="checkbox"/>	05:00pm	07:00pm

4 Hours

4 hours

<input type="checkbox"/>	Start Time	End Time
<input type="checkbox"/>	08:00am	12:00pm
<input type="checkbox"/>	01:00pm	05:00pm

One Day

One day

day

Two day

Three day

Three day

Apply appointment windows: To apply the appointment windows, switch the toggle to the right. To un-apply an appointment window, switch the toggle to the left.

User will be provided with Add Start Time & Delete Start Time options when select to apply Hourly windows (1 hour, 2 hours, 4 hours). The defined hourly windows are the appointment windows that could be returned in the search results.

Un-apply appointment windows:

You will be given a warning message when un-applying an appointment window.

For the hourly windows, the appointment window details will be deleted once the appointment window is un-applied.

The screenshot shows the '1 hour' window settings with the toggle switch turned off. A confirmation message dialog is overlaid on the interface, containing the following text:

Confirmation Message

Are you sure you want to delete all appointment Detail Window(s)? This action cannot be undone. Click [Delete] to delete all appointment Detail Window(s), or click [Cancel].

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Scheduling Settings – Administrator, Continued

Company Tab,
continued

Company appointment type: You can define the company appointment types under Scheduling Settings page. These appointment types will be available in the Appointment Booking criteria page.

Existing appointment types are displayed in this page, you can add new appointment types, edit existing appointment types, and delete appointment types.

Appointment Types							
<input type="checkbox"/>	Appointment Type	Duration (min)	Desk Appointment	Skills	Color	Pattern	Action
<input type="checkbox"/>	Minor collision	30	No	Minor Automotive			Edit Appt Type
<input type="checkbox"/>	Desk Appraisal	30	Yes	Minor Automotive, Desk Appraisal			Edit Appt Type
<input type="checkbox"/>	Major collision	60	No	Major Automotive			Edit Appt Type
<input type="checkbox"/>	Video Appraisal	40	Yes	Minor Automotive, Desk Appraisal, Video Appraisal			Edit Appt Type
<input type="checkbox"/>	Multi-Vehicle	60	No	Major Automotive, Total Loss			Edit Appt Type
<input type="checkbox"/>	Truck	60	No	Major Automotive, Total Loss, RV, Casualty			Edit Appt Type
<input type="checkbox"/>	Fixed Appointment	30	Yes				Edit Appt Type
<input type="checkbox"/>	Commercial Property	45	No	Commercial Property			Edit Appt Type
<input type="checkbox"/>	Residential Property	60	No	Residential Property			Edit Appt Type

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Scheduling Settings – Administrator, Continued

Company Tab,
continued

Add new appointment type: You can enter an Appointment type name and a default duration, the required skills, whether or not this is a desk appointment review, and the colors and patterns that will be displayed on the Schedule Manager. All these elements can be defined for an Appointment Type with the User Interface (see illustration below). To change the color, select the pre-selected color square, select a color from the list, then click OK.

The image shows two overlapping dialog boxes. The top dialog box is titled "Edit Appointment Type" and contains the following fields and options:

- Appointment Type*:** A text input field containing "Drivable".
- Duration (min)* (480 minutes max.):** A text input field containing "45".
- Desk Appointment*:** Radio buttons for "No" (selected) and "Yes".
- Skills:** A list of checkboxes for "Car-Minor Damage", "Car-Total Loss", "Casualty-Injury", "Commercial Prop", "Heavy Equipment", "Language Spanish", "Property Damage", and "Residential Property".
- Color*:** A color selection area with a red-bordered square containing a green color swatch.
- Pattern:** Three pattern selection options: a solid grey square, a checkered pattern, and a diagonal line pattern.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

The bottom dialog box is titled "Choose a color" and displays a grid of 48 color swatches arranged in three rows and sixteen columns. The first row contains a variety of colors including reds, pinks, purples, blues, greens, and yellows. The second and third rows contain darker and more muted shades of the colors in the first row. "OK" and "Cancel" buttons are located at the bottom right of this dialog box.

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Scheduling Settings – Administrator, Continued

Appraiser Setup

Use the following to setup an Appraiser using the following tabs:

General	Standard Shift	Skills
Territories	Overrides	

CCC INFORMATION SERVICES INC. Company Appraiser Drive In My Settings Home Help Logout

Appraiser Profile

Appraiser: Doe, John

- San Diego Team
- Team 2
- San Diego team 2
- Team 1
- Team Chicago
- Chicago team
 - COOLIDGE, CALVIN
 - L, Rick
 - Doe, John

Fields marked with * are mandatory

Active Inactive

1. Name

Name: Doe, John

Team: Chicago team

Note: Use side panel to select an Appraiser from a team level.

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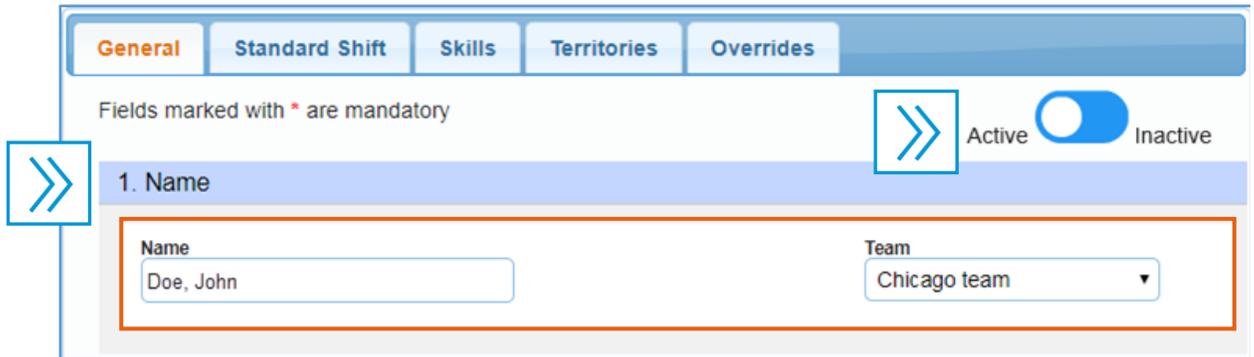
Scheduling Settings – Administrator, Continued

General Details Tab

The **General** details tab contains the basic information for each Appraiser. The following fields are available in the tab:

Toggle between active and inactive  to change an appraiser's status.

The **1. Name** field includes the Appraiser's name and Team associated with them.



The screenshot shows the 'General' tab selected. At the top, there are tabs for 'General', 'Standard Shift', 'Skills', 'Territories', and 'Overrides'. Below the tabs, a note says 'Fields marked with * are mandatory'. To the right, there is a toggle switch labeled 'Active' (which is turned on) and 'Inactive'. Below this, the '1. Name' field is highlighted with a blue box and contains a blue double arrow icon. This field is divided into two parts: 'Name' with a text input containing 'Doe, John' and 'Team' with a dropdown menu showing 'Chicago team'.

Note: Toggling the status to **Inactive** will cancel all appointments for the Appraiser. No assignments can be given to the Appraiser, and the Appraiser's name will not be returned in any appointment search result.

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Scheduling Settings – Administrator, Continued

General Details Tab, continued

Location

There are both a Starting Location and an Ending Location available in this section. These locations will calculate your drive time to your first appointment based off of the Starting Location and the drive time from your last appointment based off of the Ending Location. The Start and End Locations can be different, however select the **Same as Start Location** check box in the event that they are the same.

The screenshot shows a web form titled "2. Location" with a sub-section "End Location". A blue arrow points to a checkbox labeled "Same as Start Location", which is highlighted with an orange border. Below the checkbox are input fields for "Street Address*" (20045 Saunders Rd), "City*" (Deerfield), "State*" (Illinois), and "Zip Code" (60015 0000). The "State*" field is a dropdown menu. The "Zip Code" field is split into two input boxes for the main number and the last four digits.

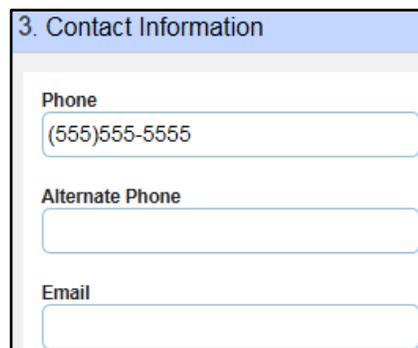
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Scheduling Settings – Administrator, Continued

General Details Tab, continued

Contact Information

Here the Appraiser's Phone, Alternate Phone and Email are maintained.



3. Contact Information

Phone
(555)555-5555

Alternate Phone

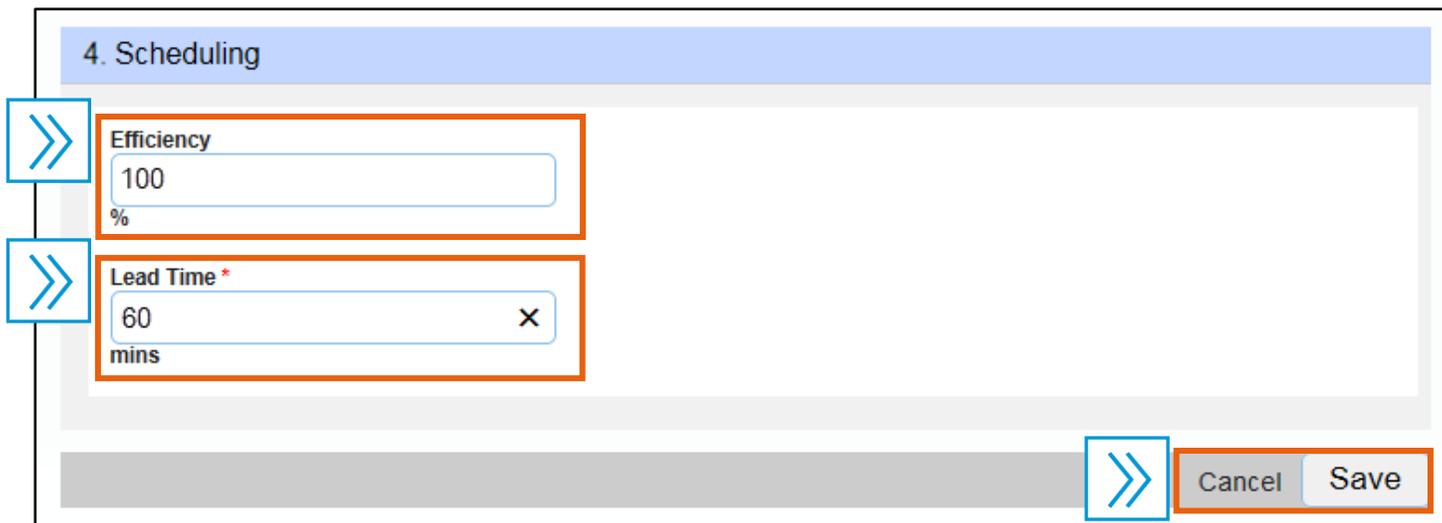
Email

Scheduling

In the **Efficiency** field, an efficiency percentage is entered. If an appraiser is, for example, 200% efficient the scheduling tool would give them 25 minutes to do a 50 minute job. If the appraiser is 100% efficient, the tool would give 50 minutes to do a 50 minute job.

Lead Time is the amount of time prior to an appointment that the appraiser needs to receive notification. For example, if the lead time for an appointment is set to 60 minutes and an appointment is booked for the appraiser with 15 minutes of drive time, the earliest possible appointment would be the current time +60 minutes of lead time + 15 minutes of drive time. If the current time is 8:15am, the earliest appointment based on this formula would be 9:30am.

When you're finished updating the information, please select the **Save** button at the bottom right of the screen. If you do not want to save the information, select **Cancel**.



4. Scheduling

Efficiency
100
%

Lead Time *
60
mins

Cancel Save

Standard Shift Tab

The **Standard Shift** tab contains the shift that the appraiser works. To add a shift, use the following steps:

Step	Action
1	Select the Add button on the Standard Shift window.
2	Select the shift you would like to add, from the drop-down.

General **Standard Shift** Skills Territories Overrides

Doe, John has the following shifts assigned.

<input type="checkbox"/>	Shift	Shift start date	Shift end date
<input type="checkbox"/>	Shift 730-430	04/18/2016	03/31/2022
<input checked="" type="checkbox"/>	MTWRF8-5		

Delete + Add

Continued on next page

Scheduling Settings – Administrator, Continued

Standard Shift Tab, continued

Step	Action
3	Add the Shift Start Date. This will make the shift apply to the scheduling tool effective that date. Add Shift End Date if there is a temporary change. Click Enter on the keyboard to accept the changes.
4	If needed, select the Refresh button to reload the Standard Shifts for the appraiser.

Doe, John has the following shifts assigned.

	Shift	Shift start date	Shift end date
<input type="checkbox"/>	Shift 730-430	04/18/2016	03/31/2022
<input checked="" type="checkbox"/>	MTWRF8-5	<input type="text"/>	<input type="text"/>

Continued on next page

Scheduling Settings – Administrator, Continued

Standard Shift Tab, continued

Use the following to Delete a shift:

Step	Action
1	Place a Checkmark to the left of the shift name.
2	Click Delete .

The screenshot shows the 'Doe, John Profile' page with the 'Standard Shift' tab selected. Below the tab, it says 'Doe, John has the following shifts assigned.' A table lists the shifts:

	Shift	Shift start date	Shift end date
1	<input type="checkbox"/> Shift 730-430	04/18/2016	03/31/2022
	<input checked="" type="checkbox"/> MTWRF8-5		

Below the table, there is a 'Delete' button (highlighted with a red box and labeled '2') and an '+ Add' button.

When you select Delete a pop-up window will appear to ensure that the specific Shift should be deleted. Click **Delete (#3)** to delete the shift assignment, and cancel to keep the selected shift assignment.

The screenshot shows a 'Delete' pop-up window with the following text:

Delete selected shift assignment(s)
 Removing a shift from an appraiser will cause all appointments that fall within that shift to be sent to the exceptions bucket for reassignment.
 If an appraiser has no shifts on their schedule, all assignments assigned to the appraiser will also be moved to the exceptions bucket.

At the bottom right, there are two buttons: 'Delete' (highlighted with a red box and labeled '3') and 'Cancel'.

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Scheduling Settings – Administrator, Continued

Standard Shift Tab, continued

A warning message is displayed when there are existing appointments booked with the appraiser shift. Choose the appropriate option:

- A. **Move To Exceptions:** Delete the shift and move all existing appointments to Exception buckets.
- B. **Keep Shift:** Keep the shift.
- C. **Keep Appointments:** Delete the shift assignment but keep existing appointments.

Exception Bucket Message

Lunch Break (2017-09-25 13:00:00 CDT - 2017-09-25 13:30:00 CDT)
BH17092501 (2017-09-25 15:00:00 CDT - 2017-09-25 15:45:00 CDT)
PTO (2017-09-26 07:30:00 CDT - 2017-09-26 08:30:00 CDT)
js_sep22_005 (2017-09-26 09:00:00 CDT - 2017-09-26 09:45:00 CDT)
Lunch Break (2017-09-26 13:00:00 CDT - 2017-09-26 13:30:00 CDT)
Lunch Break (2017-09-27 13:00:00 CDT - 2017-09-27 13:30:00 CDT)

Move To Exceptions Keep Shift B

Keep Appointments C

Skills Tab

The **Skills** tab includes all of the skills that the company has added. From this tab these skills can be applied to specific appraisers. Check the box next to the skill to add it to the appraiser.

General	Standard Shift	Skills	Territories	Overrides
Skills				
<input checked="" type="checkbox"/>		Car Salvage		
<input checked="" type="checkbox"/>		Car Theft		
<input checked="" type="checkbox"/>		Car-Major Damage		
<input checked="" type="checkbox"/>		Car-Minor Damage		
<input checked="" type="checkbox"/>		Car-Total Loss		
<input checked="" type="checkbox"/>		Casualty-Injury		

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Scheduling Settings – Administrator, Continued

Territories Tab

The **Territories** tab allows you to assign Appraiser coverage as both Staff and Desk by toggling between Desk Coverage and Staff Coverage.

All appraisers support both desk and field appointment types. This allows the scheduling tool to apply the appraiser to the correct appointments.

NOTE: When you add territories, you will now see a line to type in a new zip code. Zip code territories must be set up by day, in the event an appraiser works different areas on different days.

For Staff Coverage, click **Add Territories** to begin adding a territory for the day of the week, or select territories and click **Delete Territories** to delete selections.

To assign zip code territories to a specific Appraiser, use the following steps:

Step	Action
1	Toggle to Staff coverage.
2	Select the day to add the new territory Zip Code to.
3	Click on the Add Territories button. This opens a new line to type in the new Zip Code. Click Enter on the keyboard to accept the changes.
4	If this territory needs to be applied to one or more additional days of the week, click on the Copy To Another Day(s) button.
5	If you need to apply territories from another appraiser to this appraiser, click on the Copy From Another Appraiser button. Enter the name of the appraiser that you want to copy from the Copy From Appraiser dropdown, and then click on the Copy button. A message window opens to let you know that the copied territories are now added to the appraiser's current list of territories. Click on the X to close the window. (See page 29 of more details)

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Scheduling Settings – Administrator, Continued

Territories Tab, continued

For Desk Coverage:



Toggle to **Desk Coverage**

Select **States** from left column and click the right arrow to add the desk coverage.
Click **Save** to save the desk coverage for the Appraiser.

To assign states to a specific Appraiser, use the following steps:

Step	Action
1	Toggle to Desk Coverage.
2	Select States from left column.
3	Click the right arrow to add the desk coverage.
4	The States now appear in the right column .
5	Click Save .

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Scheduling Settings – Administrator, Continued

Territories Tab, continued

General Standard Shift Skills Territories Overrides

Desk Coverage Staff Coverage

1

Alabama
Alaska
American Samoa
Arizona
Arkansas
Armed Forces - Americas
Armed Forces - Canada
Armed Forces - Pacific
California
Colorado
Connecticut
Delaware
District of Columbia
Federated States of Micronesia
Florida
Georgia
Guam
Hawaii
Idaho
Illinois
Indiana
Iowa
Kansas
Kentucky
Louisiana
Maine
Marshall Islands
Maryland
Massachusetts
Michigan
Minnesota
Mississippi
Missouri
Montana
Nebraska
Nevada
New Hampshire
New Jersey
New Mexico
New York
North Carolina
North Dakota

2

3

4

California
Illinois
New York

5

Unselect All
Select All
<<
>>

Copy From Another Appraiser

Save

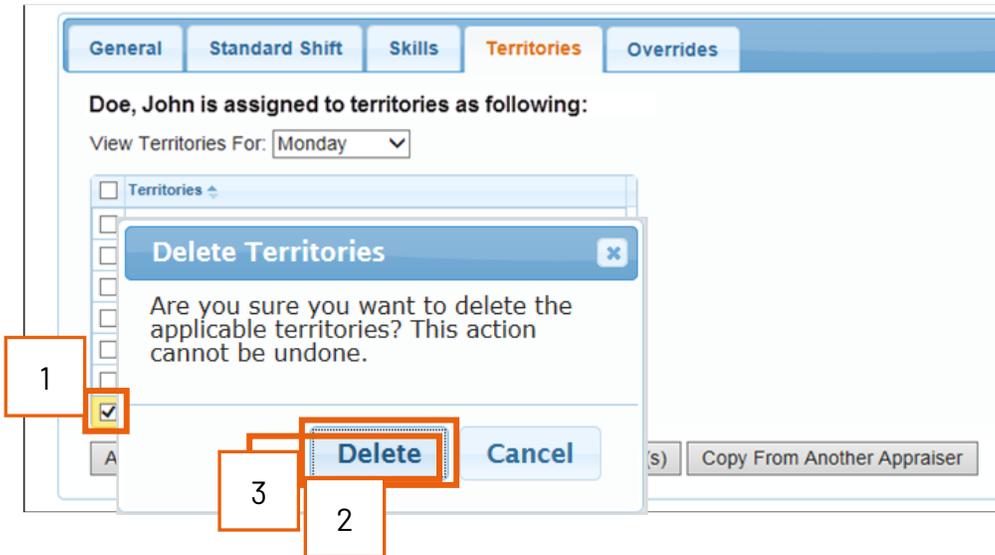
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Scheduling Settings – Administrator, Continued

Territories Tab, continued

To Delete a Zip Code Territory, use the following steps:

Step	Action
1	Select the Zip code(s) to be removed.
2	Click the Delete Territories button.
3	After clicking Delete Territories you will see a confirmation pop up. Click Delete to delete the selection, or click Cancel to keep the selection.



Continued on next page

Scheduling Settings – Administrator, Continued

Overrides Tab The **Overrides** tab contain Shift and Territories sections use these to temporarily change your shift and territories.

For example, an appraiser may have their territory in Illinois but they may be needed in Wisconsin for a couple of days. In this case, you can override their territory for the specific dates you choose.

To add an override **Shift**, use the following steps:

Step	Action
1	Select the Add button in the Shift section.

Appraiser: Doe, John

San Diego Team
Team 2
San Diego team 2
Team 1
Team Chicago
Chicago team
COOLIDGE, CALVIN
L, Rick

General Standard Shift Skills Territories **Overrides**

Doe, John has the following overrides.

Shift	Shift start date	Shift end date
<input type="checkbox"/> + Add		

Territories

Delete + Add Edit

Step	Action
2	Select the Shift from the drop-down.
3	Select a Shift start date and Shift end date .

General Standard Shift Skills Territories **Overrides**

Doe, JOHN has the following overrides.

Shift	Shift start date	Shift end date
<input checked="" type="checkbox"/> 24 hour shift	11/01/2017	11/02/2017

Delete + Add

Nov 2017

Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Note: Territory Overrides are not available to Desk Appraisers.

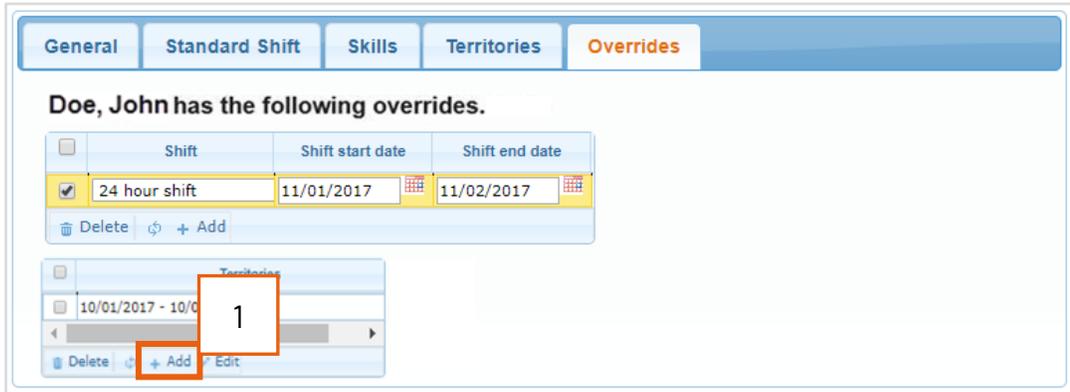
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Scheduling Settings – Administrator, Continued

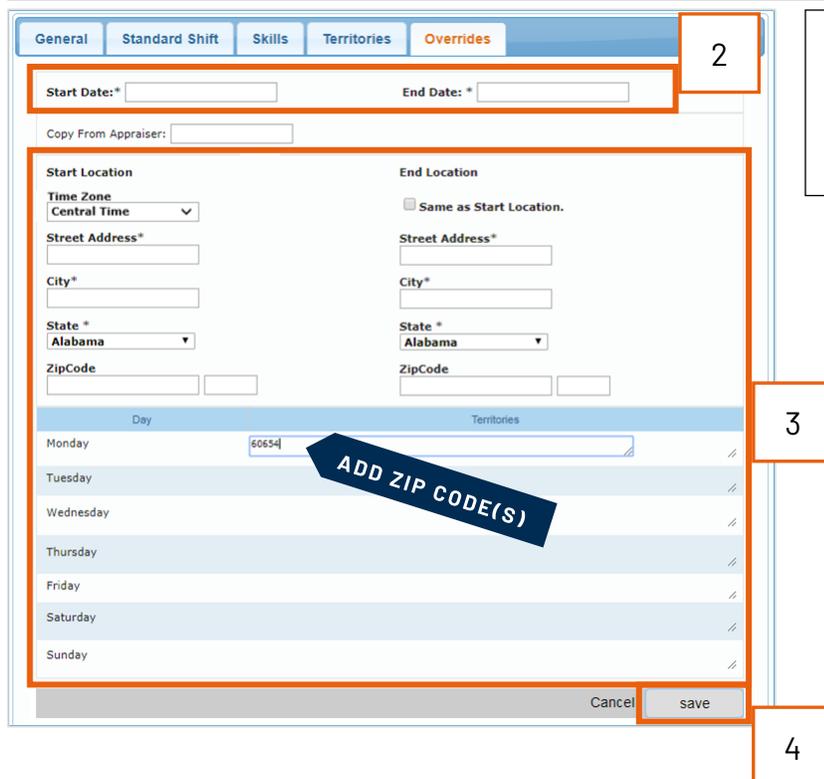
Overrides Tab, continued

To add override Territories, use the following steps:

Step	Action
1	Select the Add button in the Territories section.



Step	Action
2	Enter the Start Date and End Date .
3	Enter the Territories information and zip code(s) in the appropriate fields. If applicable, you may enter an appraisers name in the Copy from Appraiser field to automatically fill in the territories fields, if necessary, fields can be edited.
4	Click Save when finished. The territory is now added.



Note: There is no limit to the number of overrides that can be created as long as they do not overlap.

Scheduling Settings – Administrator, Continued

Copy from Another Appraiser

Enter the name of the appraiser that you want to copy (#1), and then click on the **Copy** button (#2).

Day	Territories
Monday	46201,46237
Tuesday	46201,46237
Wednesday	46201,46237
Thursday	46201,46237
Friday	46201,46237
Saturday	46201,46237
Sunday	60605,60654,60614,60657,46201,60201,46237,92111,92117,92120,92121,92122,92126,60601,92123,60625

A pop-up window opens to let you know that the copied territories are now added to the appraiser's current list of territories. Click on the X (#3) to close the window.

COOLIDGE, CALVIN is assigned to territories as following:

View Territories For: Monday

- Territories
- 46201
- 46237
- 60622
- 60625
- 60654
- 60657

Add Territories

Territories Successfully Copied...
The selected appraiser territories have been successfully copied.

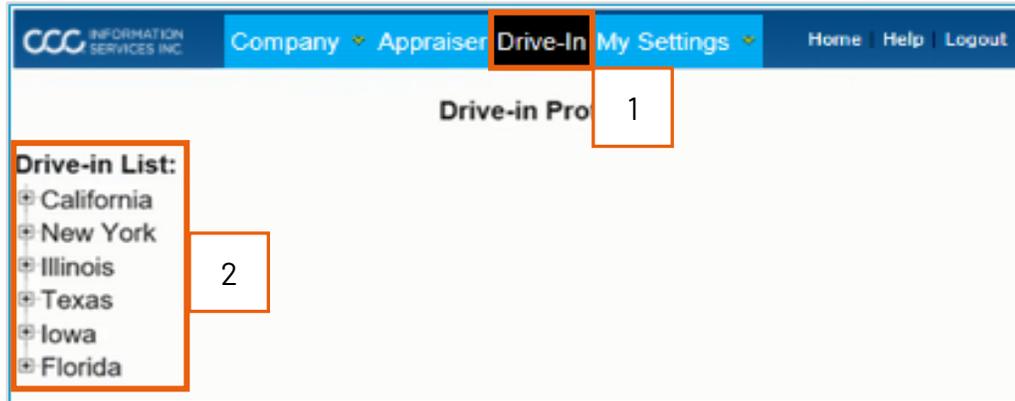
Copy From Another Appraiser

Scheduling Settings – Administrator, Continued

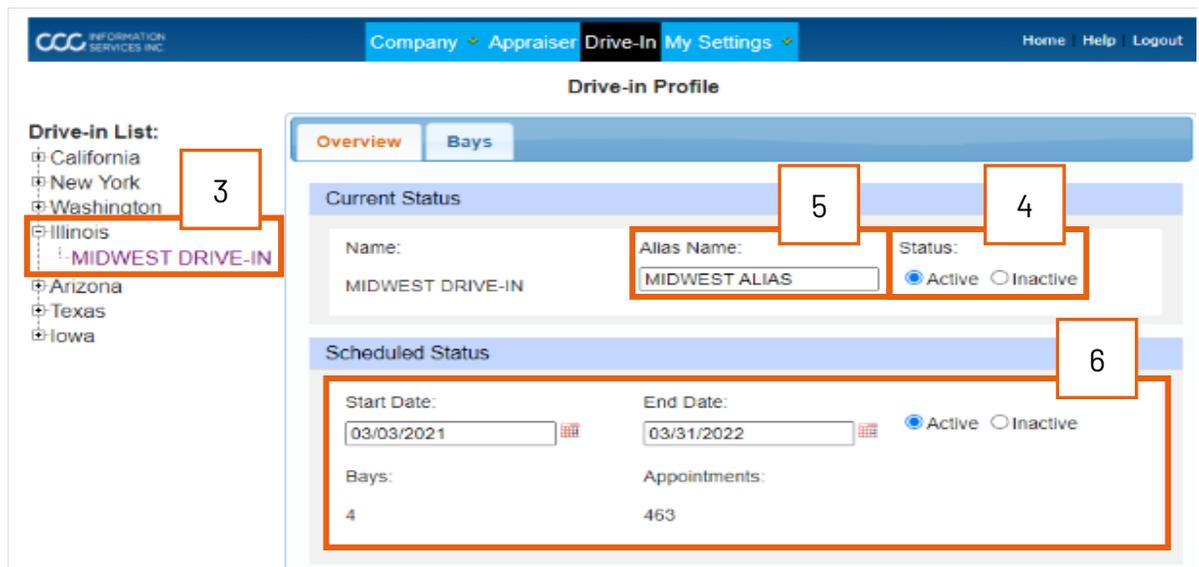
Drive-In Settings

Use the **Drive-In** tab to set up Drive-In facilities so that appointments can be booked from appointment booking with the facility.

Select the **Drive-In** tab (#1). The existing drive in facilities will display in the Drive-in List separated by state. Click a **State** (#2) to expand the list.



Select a **Drive-in** (#3) facility from the list to view the Drive-in Profile details. When Drive-ins are initially added they will be set to an **Inactive** status, this must be manually changed to **Active** (#4) for the Drive-In location to be used in appointment booking and to appear in a drive-in search. The Alias Name can be entered in the field, this should be the same as the Drive-In name or the name of the temporary location (#5). Enter a Schedule **Start Date/End Date**, and change the schedule status to **Active** or **Inactive** (#6).

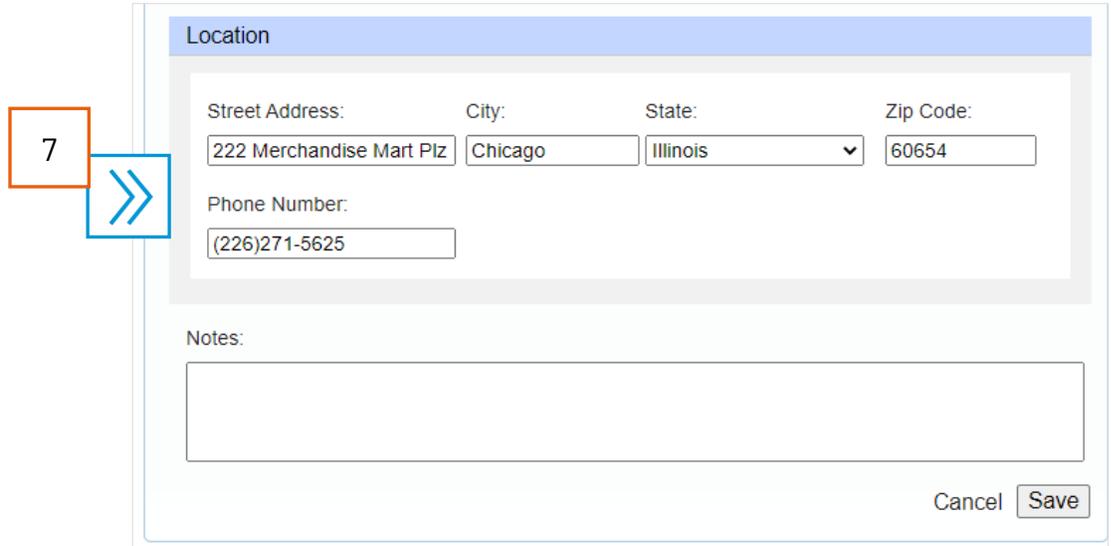


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Scheduling Settings – Administrator, Continued

Drive-In Settings, continued

Drive-In locations (**#7**) can be modified for catastrophe purposes and is only used for appointment booking. If the state is changed, the drive-in facility will be visible in the corresponding state found in the Drive-in List.



The screenshot shows a 'Location' form with the following fields and values:

Street Address:	City:	State:	Zip Code:
222 Merchandise Mart Plz	Chicago	Illinois	60654

Phone Number: (226)271-5625

Notes:

Buttons: Cancel Save

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Scheduling Settings – Administrator, Continued

Drive-In Settings, continued

Once the location has been set up for drive-ins select the **Bays** tab (#6). The Bays tab show the capacity of the drive-in location, to add bays click the **Add New** button (#7).

Drive-in List:

- California
- New York
- Illinois
 - MIDWEST DRIVE-IN
- Texas
- Iowa
- Florida

Overview **Bays** 6

Bay	Shift	Status
1	MTWRF8-5	Active
2	MTWRF8-5	Active
3	MTWRF10-7	Inactive
4	Demoshift1vv	Active

Press [enter] after editing to save changes

7 Add New

Add an existing **Shift (#8)** from the drop-down in the Shift column. Press **Enter** after editing to save changes.

Drive-in List:

- California
- New York
- Illinois
 - MIDWEST DRIVE-IN
- Texas
- Iowa
- Florida

Overview **Bays**

Bay	Shift	Status
1	MTWRF8-5	Active
2	MTWRF8-5	Active
3	MTWRF10-7	Inactive
4	Demoshift1vv	Active

Press [enter] after editing to save changes

7 Add New

8

- 24 hour shift
- MT 8-5
- MTWRF10-7
- MTWRF8-5
- MTWRF830-530
- MWF8-5TR7-4
- MTWRF830-530
- MWF8-5TR7-4
- OverrideShift-1

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Scheduling Settings – Administrator, Continued

Drive-In Settings, continued

In the Status column select **Active** or **Inactive** from the drop-down. Press **Enter** after editing to save changes. Once shifts are added, they will be shown as available in a radius search as well as the corresponding capacity as an appointment slot in appointment booking. The search will only show the appointment start time, because the customer is driving to the drive-in facility for the appraisal/ estimate.

- Active: Bays will be shown as available in a drive-in search.
- Inactive: Bays will NOT be shown as available in a drive-in search.
- Paused: Bays will NOT be shown as available in a drive-in search. All previously booked appointments will remain at the same bay. The bay will not receive new appointments.

Drive-in List:

- California
- New York
- Illinois
 - MIDWEST DRIVE-IN
- Texas
- Iowa
- Florida

Overview **Bays**

Bay	Shift	Status
1	MTWRF8-5	Active
2	MTWRF8-5	Active
3	MTWRF10-7	Inactive
4	Demoshift1vv	Active

Press [enter] after editing to save changes

Add New

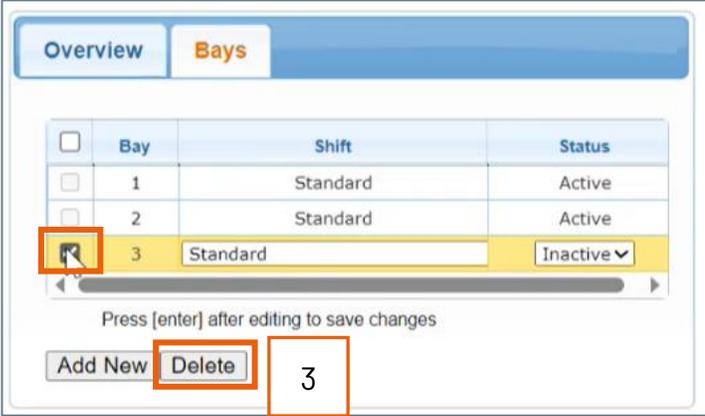
Delete a Bay: Follow the steps below to Delete a bay from a Drive-In Profile:

Step	Action
1	<p>Click the Status drop-down menu and select Inactive for the bay you want to delete.</p> <p>Note: You can only delete a Bay if the Status is set to Inactive.</p>

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Scheduling Settings – Administrator, Continued

Drive-In Settings, continued

Step	Action
2	<p>Select the checkbox for the Bay you want to delete.</p> 
3	<p>Click the Delete button. A Delete Bays warning prompt displays.</p>
4	<p>Click Yes.</p> 

Shift assignments may also be changed, select a new **Shift** from the drop-down, if necessary, change the status. Press **Enter** after editing to save changes.

Drive-in List:

- ☑ California
- ☑ New York
- ☐ Illinois
 - ↳ MIDWEST DRIVE-IN
- ☑ Texas
- ☑ Iowa
- ☑ Florida

