

Scheduling Settings – Appraiser

Table of Contents

Scheduling Settings - Appraiser	2
Overview	2
Accessing Scheduling Settings.....	2
General Details Tab.....	3
Standard Shift Tab.....	6
Skills Tab.....	8
Territories Tab	9
Overrides Tab	13
Required/ Restricted Address.....	15



Scheduling Settings - Appraiser

Overview

When setting up the CCC® Scheduling tool, the Scheduling Settings need to be configured. The self-service settings include:

- General Details
- Standard Shift
- Skills
- Territories
- Overrides
- Required/Restricted Address

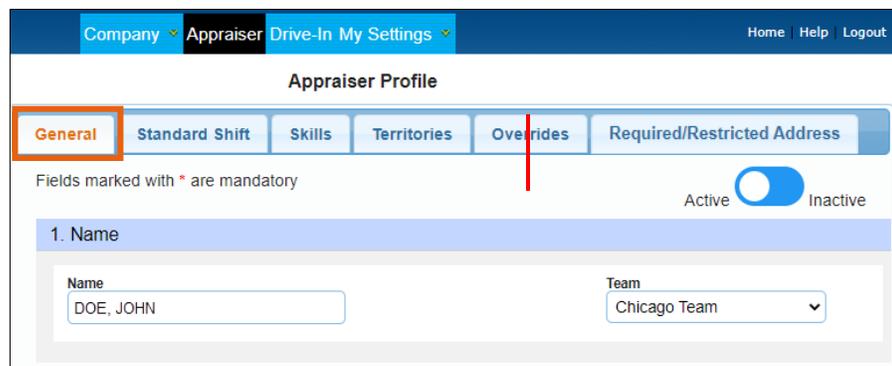
This job aid will cover each section of the Scheduling Settings and how to use them.

Accessing Scheduling Settings

To access the Scheduling Settings, log into the CCC Portal at **mycccportal.com**. In the **Scheduling** section on the portal home page, select the **Scheduling Settings** link.



Upon arrival at the Scheduling Settings page, you will see the settings tabs along the top of the screen and you will automatically be in the **General** Details tab.



Continued on next page

Scheduling Settings - Appraiser, Continued

General Details Tab

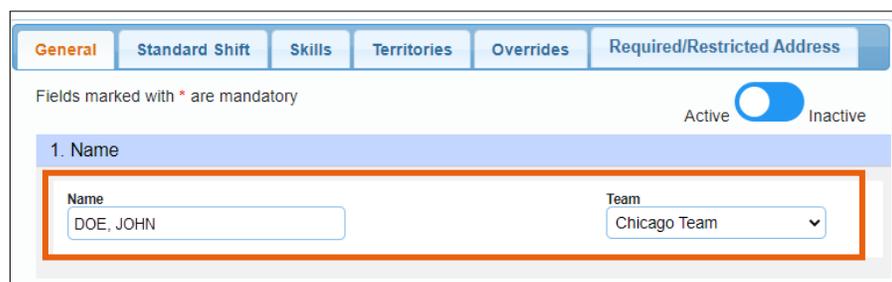
The General Details tab contains the basic information for each Appraiser.

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

The following fields are available in the tab:

1. Name

This field includes both the Appraiser name and the Team associated with the Appraiser.



The screenshot shows a web interface for an Appraiser's General Details. At the top, there are tabs for 'General', 'Standard Shift', 'Skills', 'Territories', 'Overrides', and 'Required/Restricted Address'. Below the tabs, there is a note: 'Fields marked with * are mandatory'. To the right of this note is a toggle switch for 'Active' (checked) and 'Inactive'. Below the toggle switch is a section titled '1. Name'. This section contains two fields: 'Name' with the value 'DOE, JOHN' and 'Team' with a dropdown menu set to 'Chicago Team'. The 'Name' and 'Team' fields are enclosed in a red rectangular box.

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.

Continued on next page

Scheduling Settings - Appraiser, Continued

**General
Details Tab,**
continued

2. 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 displays two side-by-side panels for location configuration. The left panel, titled '2. Location', contains the 'Start Location' section with the following fields: 'Time Zone' (dropdown menu set to 'Central Time'), 'Street Address*' (text input '222 Merchandise Mart Plaza'), 'City*' (text input 'Chicago'), 'State*' (dropdown menu set to 'Illinois'), and 'Zip Code' (two text inputs '60654' and '4512'). The right panel, titled 'End Location', contains the following fields: a checkbox labeled 'Same as Start Location' (highlighted with an orange border), 'Street Address*' (text input '222 Merchandise Mart'), 'City*' (text input 'Chicago'), 'State*' (dropdown menu set to 'Illinois'), and 'Zip Code' (two text inputs '60654' and '1001').

Continued on next page

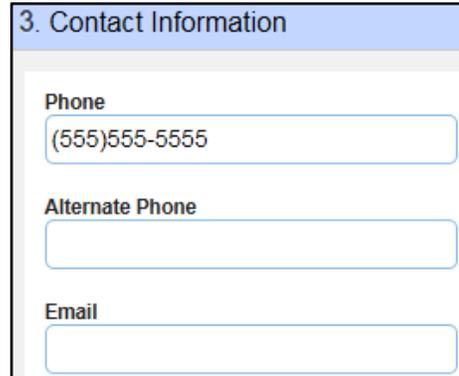


Scheduling Settings - Appraiser, Continued

**General
Details Tab,**
continued

3. Contact Information

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



3. Contact Information

Phone
(555)555-5555

Alternate Phone

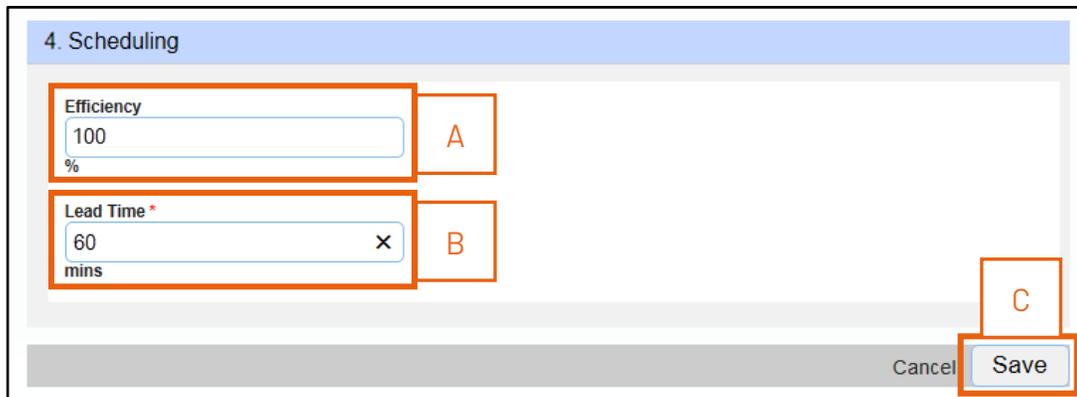
Email

4. Scheduling

In the (A) **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.

(B) **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, select the (C) **Save** button at the bottom right of the screen, a message appears indicating the details have been successfully saved. Select **Cancel** to delete the entry.



4. Scheduling

Efficiency
100
%

Lead Time *
60
mins

Cancel Save

Continued on next page



Scheduling Settings - Appraiser, Continued

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.
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. Note: Your cursor must be in the field of the newly added shift for the new shift to be saved.
4	If needed, select the Refresh button to reload the Standard Shifts for the appraiser.

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		

Buttons: Delete, Refresh, + Add

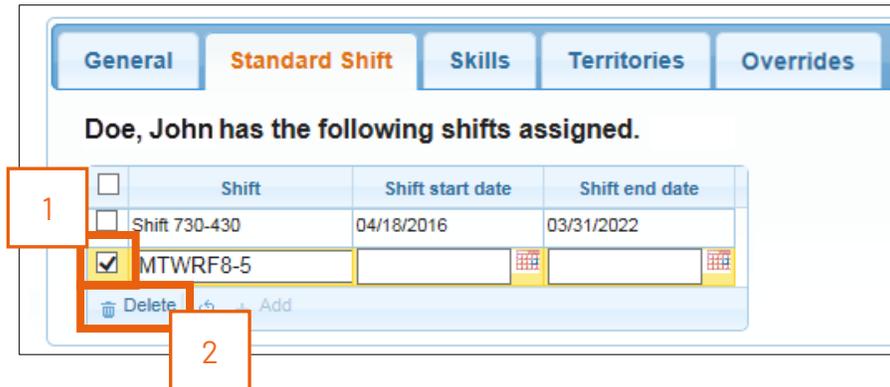
Continued on next page

Scheduling Settings - Appraiser, Continued

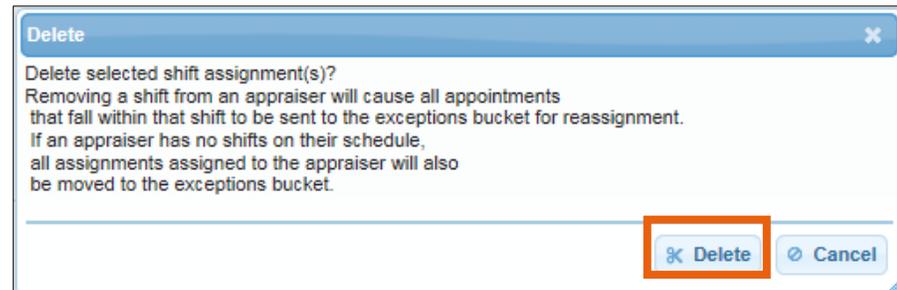
Standard Shift Tab, continued

Use the following to Delete a shift:

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



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



Continued on next page

Scheduling Settings - Appraiser, Continued

Standard Shift Tab, continued

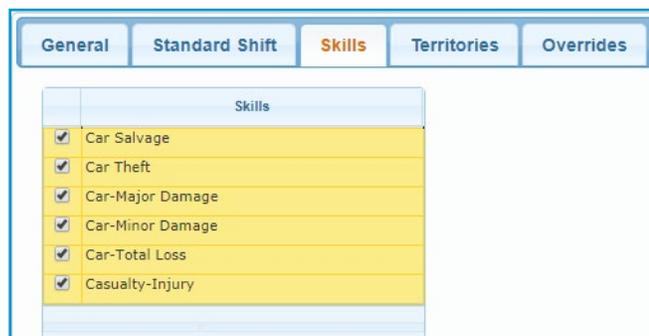
A warning message is displayed when there are existing appointments booked with the appraiser shift. Choose the appropriate option:

1. **Move To Exceptions:** Delete the shift and move all existing appointments to Exception buckets.
2. **Keep Shift:** Keep the shift.
3. **Keep Appointments:** Delete the shift assignment but keep existing appointments.



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.



Continued on next page

Scheduling Settings - Appraiser, 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	Description
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. Note: Your cursor must be in the field of the newly added zip code for the new territory to be saved.
4	Select Export ZIPs to download an Excel® file of your territory ZIP codes and associated days those territories are covered.
5	Select Import ZIPs to import your territory ZIP codes and associated days those zones are covered.

Use the following Excel format to upload:

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
61818	61818	61818	61818	60657	61818	60654
61829	61829	61829	61829		61829	60614
61821	61821	61821	61821		61821	
61822	61822	61822				

6	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.
7	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.

Continued on next page



Scheduling Settings - Appraiser, 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 .

Scheduling Settings - Appraiser, Continued

Territories
Tab, continued

For Desk Coverage:

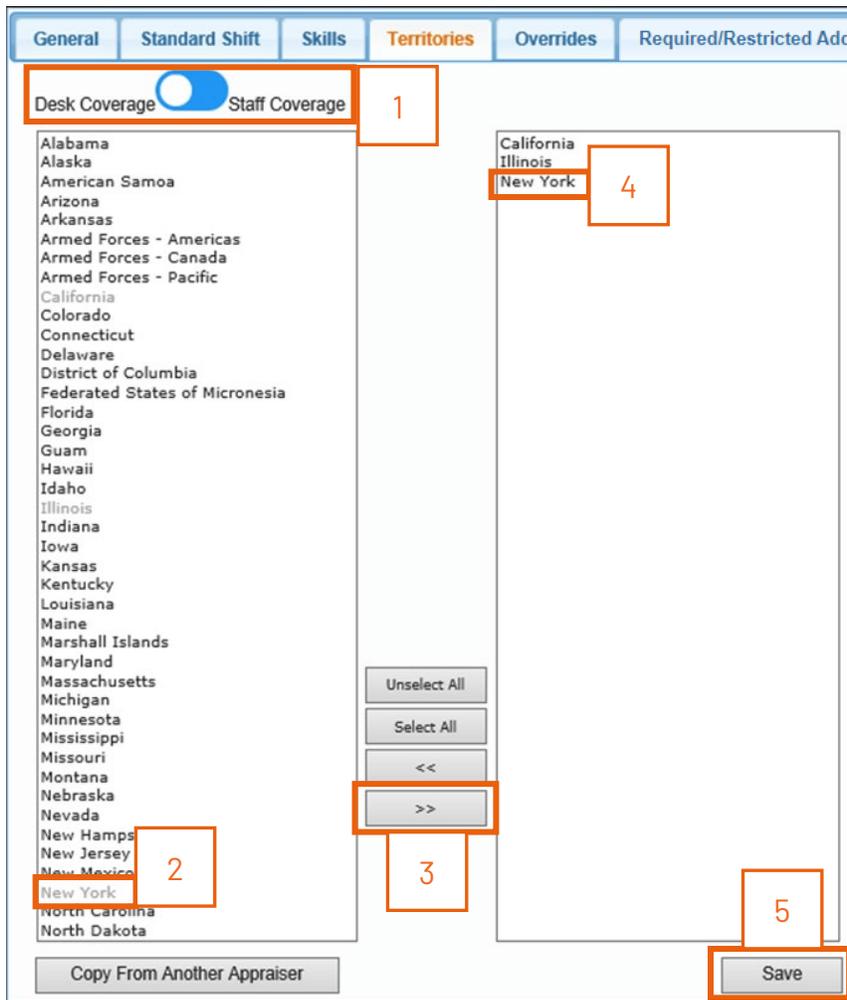
Toggle to **Desk Coverage**

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, a message will appear indicating the territory has been successfully saved.



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 .

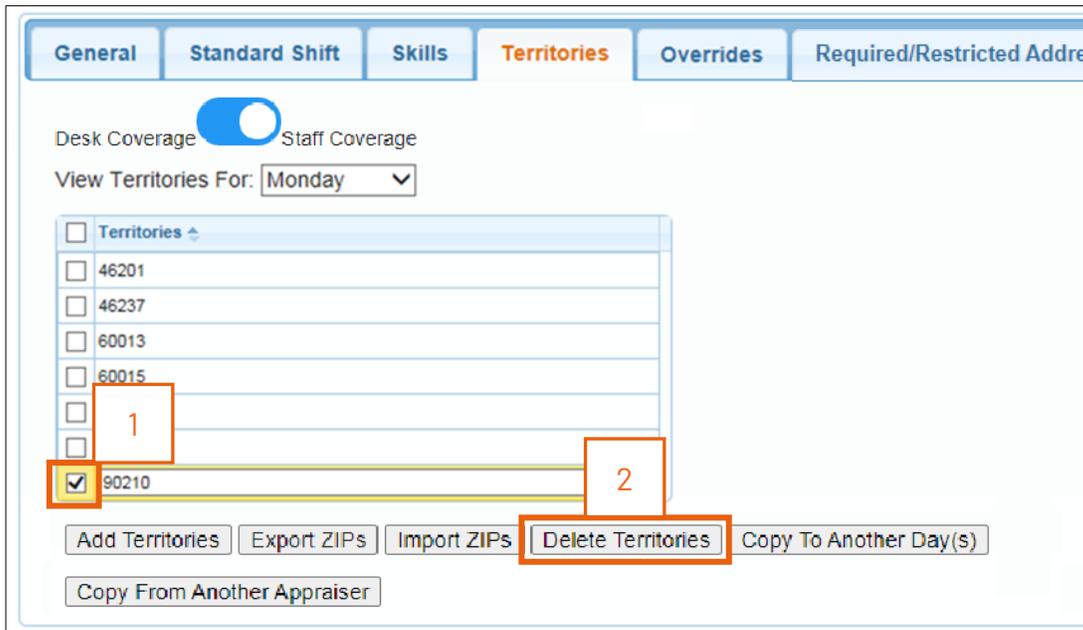


Scheduling Settings - Appraiser, Continued

Territories Tab, continued

To Delete a Territory, use the following steps:

Step	Action
1	Select the Zip code(s) to be removed.
2	Click the Delete Territories button.



Step	Action
3	<p>After clicking Delete Territories you will see a confirmation pop up. Click Delete to delete the selection, or click Cancel to keep the selection.</p> <div data-bbox="613 1314 1230 1661" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center;">Delete Territories ✕</p> <p>Are you sure you want to delete the applicable territories? This action cannot be undone.</p> <p style="text-align: center;"> Delete Cancel </p> </div>

Continued on next page

Scheduling Settings - Appraiser, Continued

Overrides Tab

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

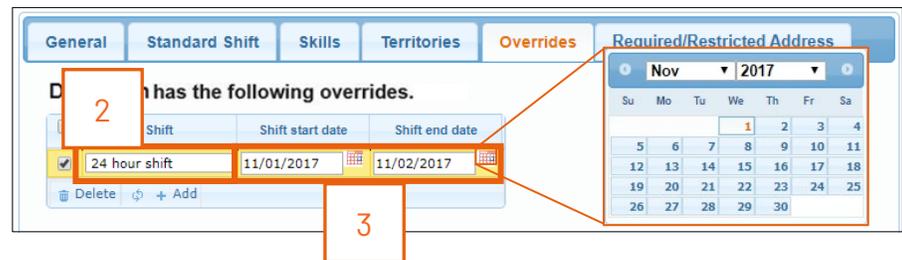
For example, an appraiser may have their territory in Illinois but they may be needed in Wisconsin for a couple of days. In this case, you can override their territory for the specific dates you choose.

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

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

The screenshot shows the 'Overrides' tab selected in the navigation bar. Below the navigation bar, it says 'Doe, John has the following overrides.' There are two sections: 'Shift' and 'Territories'. In the 'Shift' section, there is a table with columns for 'Shift', 'Shift start date', and 'Shift end date'. Below this table is a 'Delete' button and an '+ Add' button, which is highlighted with a red box.

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



Continued on next page

Scheduling Settings - Appraiser, Continued

Overrides Tab, continued

To add override Territories, use the following steps:

Step	Action
1	Select the Add button in the Territories section.
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 appraiser's name in the Copy from Appraiser field to automatically fill in the territories fields.
4	Click Save when finished. The territory is now added.

Note: There is no limit to the amount of overrides that can be created as long as they don't overlap.

The screenshot shows the 'Overrides' tab in the Scheduling Settings interface. The 'Territories' section is highlighted with an orange box. The 'Start Date' and 'End Date' fields are highlighted with an orange box and labeled '2'. The 'Start Location' and 'End Location' fields are highlighted with an orange box and labeled '3'. The 'save' button is highlighted with an orange box and labeled '4'. A blue arrow points to the 'Add ZIP codes' button in the Territories table.

Continued on next page

Scheduling Settings - Appraiser, Continued

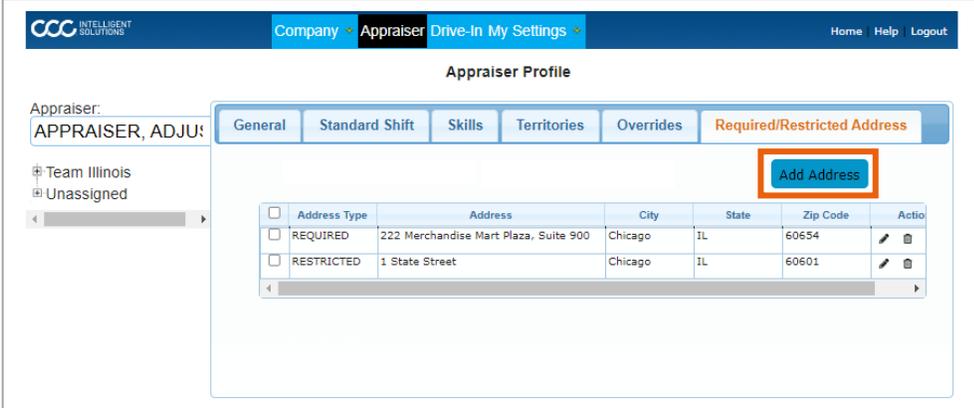
Required/ Restricted Address

The **Required/ Restricted Address** tab displays a list of the Required and/or Restricted Addresses for the selected Appraiser.

Required Address: If an appointment address matches with a Required Address for 1 or more Appraisers, those appraisers will be the top results when searching for available appointment slots. **Note:** If the matching Appraisers are not available other appraisers nearby with matching skills, etc. will be returned in the results.

Restricted Address: If an appointment address matches with a Restricted Address that Appraiser would NOT be included in the results when searching for available Appraisers to book.

To add a Required or Restricted Address follow the steps below:

Step	Action																					
1	<p>Click Add Address. The New Address window opens.</p>  <table border="1" data-bbox="641 1039 1307 1129"> <thead> <tr> <th><input type="checkbox"/></th> <th>Address Type</th> <th>Address</th> <th>City</th> <th>State</th> <th>Zip Code</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>REQUIRED</td> <td>222 Merchandise Mart Plaza, Suite 900</td> <td>Chicago</td> <td>IL</td> <td>60654</td> <td> </td> </tr> <tr> <td><input type="checkbox"/></td> <td>RESTRICTED</td> <td>1 State Street</td> <td>Chicago</td> <td>IL</td> <td>60601</td> <td> </td> </tr> </tbody> </table>	<input type="checkbox"/>	Address Type	Address	City	State	Zip Code	Action	<input type="checkbox"/>	REQUIRED	222 Merchandise Mart Plaza, Suite 900	Chicago	IL	60654		<input type="checkbox"/>	RESTRICTED	1 State Street	Chicago	IL	60601	
<input type="checkbox"/>	Address Type	Address	City	State	Zip Code	Action																
<input type="checkbox"/>	REQUIRED	222 Merchandise Mart Plaza, Suite 900	Chicago	IL	60654																	
<input type="checkbox"/>	RESTRICTED	1 State Street	Chicago	IL	60601																	
2	Select Required or Restricted Address from the Select Address Type dropdown.																					
3	Enter an Address .																					
4	Enter a City .																					
5	Select a State from the dropdown.																					
6	Enter a Zip Code and option Extn .																					
7	Click Save . Then click OK .																					

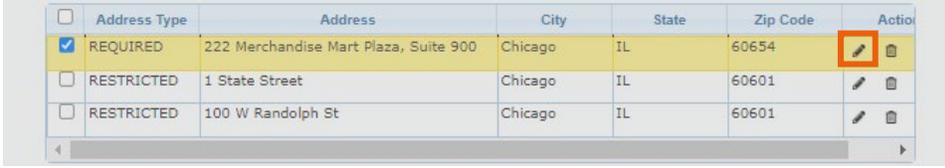
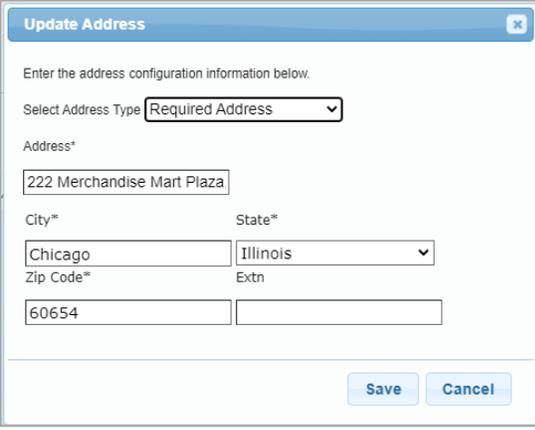
Continued on next page



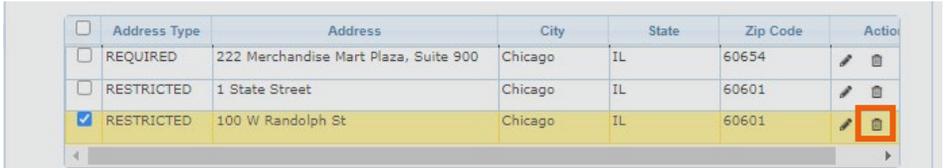
Scheduling Settings - Appraiser, Continued

Required/ Restricted Address, continued

Follow the steps below to edit an address entry:

Step	Action																												
1	<p>Click the Edit icon for the address you want to edit. The Update Address window opens. Note: Only one address can be edited at a time.</p>  <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Address Type</th> <th>Address</th> <th>City</th> <th>State</th> <th>Zip Code</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>REQUIRED</td> <td>222 Merchandise Mart Plaza, Suite 900</td> <td>Chicago</td> <td>IL</td> <td>60654</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>RESTRICTED</td> <td>1 State Street</td> <td>Chicago</td> <td>IL</td> <td>60601</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>RESTRICTED</td> <td>100 W Randolph St</td> <td>Chicago</td> <td>IL</td> <td>60601</td> <td></td> </tr> </tbody> </table>	<input type="checkbox"/>	Address Type	Address	City	State	Zip Code	Action	<input checked="" type="checkbox"/>	REQUIRED	222 Merchandise Mart Plaza, Suite 900	Chicago	IL	60654		<input type="checkbox"/>	RESTRICTED	1 State Street	Chicago	IL	60601		<input type="checkbox"/>	RESTRICTED	100 W Randolph St	Chicago	IL	60601	
<input type="checkbox"/>	Address Type	Address	City	State	Zip Code	Action																							
<input checked="" type="checkbox"/>	REQUIRED	222 Merchandise Mart Plaza, Suite 900	Chicago	IL	60654																								
<input type="checkbox"/>	RESTRICTED	1 State Street	Chicago	IL	60601																								
<input type="checkbox"/>	RESTRICTED	100 W Randolph St	Chicago	IL	60601																								
2	<p>Edit the desired information.</p> 																												
3	<p>Click Save. Then click OK.</p>																												

Follow the steps below to delete an address:

Step	Action																												
1	<p>Click the Delete icon for the address you want to delete. The Delete Address window opens. Note: Only one address can be deleted at a time.</p>  <table border="1"> <thead> <tr> <th><input type="checkbox"/></th> <th>Address Type</th> <th>Address</th> <th>City</th> <th>State</th> <th>Zip Code</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>REQUIRED</td> <td>222 Merchandise Mart Plaza, Suite 900</td> <td>Chicago</td> <td>IL</td> <td>60654</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>RESTRICTED</td> <td>1 State Street</td> <td>Chicago</td> <td>IL</td> <td>60601</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>RESTRICTED</td> <td>100 W Randolph St</td> <td>Chicago</td> <td>IL</td> <td>60601</td> <td></td> </tr> </tbody> </table>	<input type="checkbox"/>	Address Type	Address	City	State	Zip Code	Action	<input type="checkbox"/>	REQUIRED	222 Merchandise Mart Plaza, Suite 900	Chicago	IL	60654		<input type="checkbox"/>	RESTRICTED	1 State Street	Chicago	IL	60601		<input checked="" type="checkbox"/>	RESTRICTED	100 W Randolph St	Chicago	IL	60601	
<input type="checkbox"/>	Address Type	Address	City	State	Zip Code	Action																							
<input type="checkbox"/>	REQUIRED	222 Merchandise Mart Plaza, Suite 900	Chicago	IL	60654																								
<input type="checkbox"/>	RESTRICTED	1 State Street	Chicago	IL	60601																								
<input checked="" type="checkbox"/>	RESTRICTED	100 W Randolph St	Chicago	IL	60601																								
2	<p>Click Delete again to confirm.</p> 