

CCC® Production Boards - Manage Company Boards

Introduction

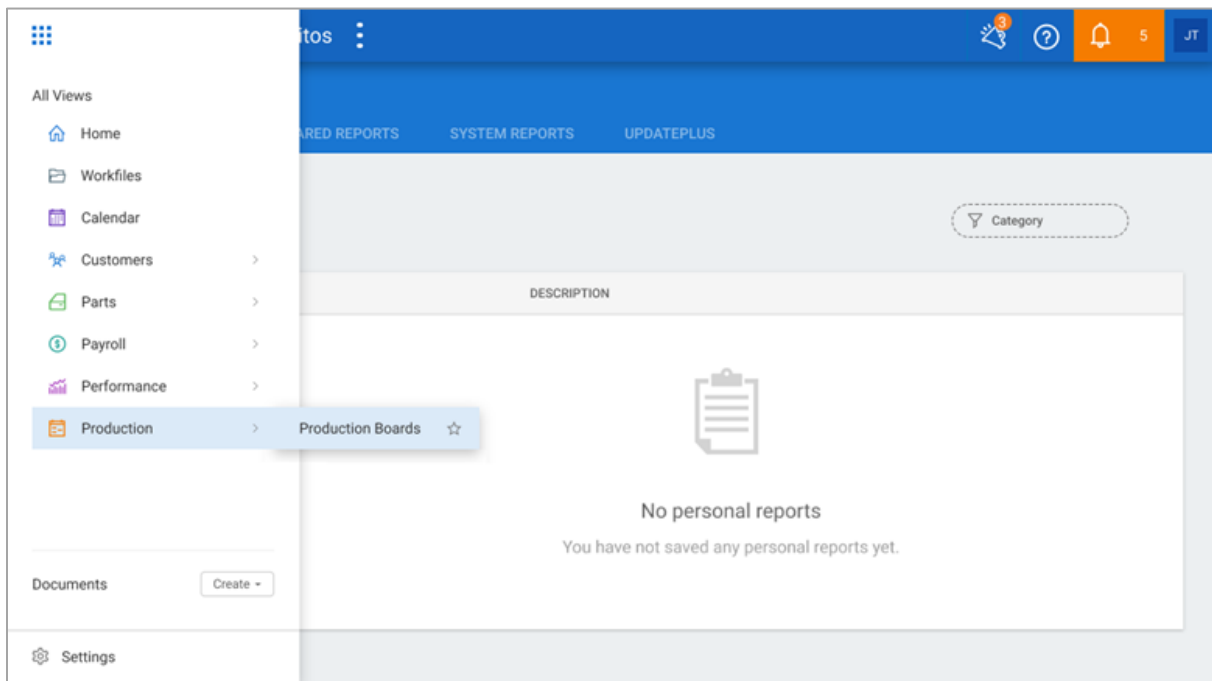
Company Boards allow MSO admins to create and share boards to multiple locations at once, maintaining standards and getting shop locations off the ground more quickly. This Job Aid discusses how to manage Company Boards in CCC® Production Boards.

Note: The user must be configured with the following permission to create and edit a Company Board: **Production – Create, edit, and delete company boards.**

Access

To access the web-based version of the Production Boards on ccccone.com:

Step	Action
1	Open ccccone.com .
2	Select the Menu icon, then select Production , then Production Boards . The Production Board will open.

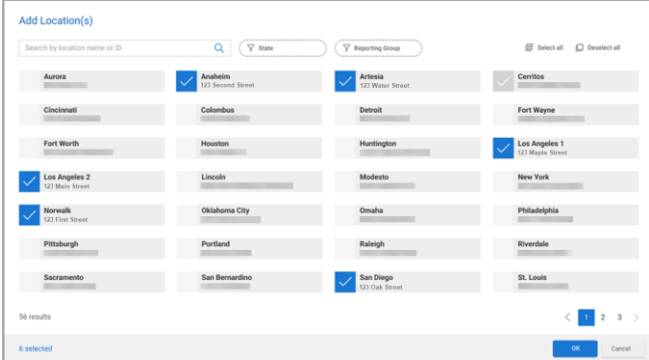


Continued on next page

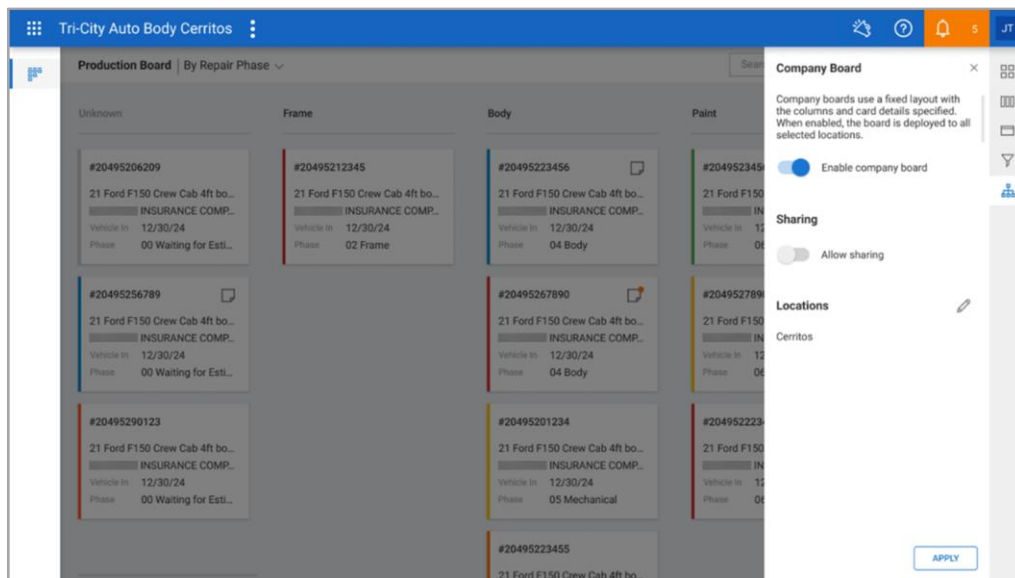
CCC® Production Boards - Manage Company Boards, Continued

Create Company Board

After setting up your Production Board, follow these steps to make a Company Board and share it.

Step	Action
1	Select the Company Board tab.
2	Move the Enable company board toggle to enable the Production Board as a Company Board.
3	Move the Allow sharing toggle to enable the Company Board to be shared.
4	Choose the locations where the Company Board should be shared, then select OK . 
5	Select Apply .

Note: Users can view and share a Company Board only if they manage and have access to its locations. Additionally, you can return to this view at anytime to Add/Remove the Shops that can view the Company Board.



Continued on next page

CCC® Production Boards - Manage Company Boards, Continued

Managing Company Board

Part	Description
Apply Changes	<p>Board changes—such as Overview, Columns, Cards, and Grouping/Filters—are only saved when you select APPLY. You can adjust settings on multiple tabs before applying them. These changes will apply to all shops configured to use this board.</p> <div data-bbox="607 642 1218 856" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="color: #0070c0;">Apply changes</p> <p style="text-align: right; color: #c00000;">⚠</p> <p>Are you sure you want to apply changes to the By Repair Phase board? This action will update the board for all assigned locations.</p> <p style="text-align: right;"> <input type="button" value="APPLY"/> <input type="button" value="CANCEL"/> </p> </div>
Delete Board	<p>When deleting a Company Board, it will no longer be accessible to any location that was set up to view it.</p> <div data-bbox="607 970 1218 1184" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="color: #0070c0;">Delete board</p> <p style="text-align: right; color: #c00000;">⚠</p> <p>Deleting a company board will delete the board from all locations. Delete By Repair Phase company board?</p> <p style="text-align: right;"> <input type="button" value="DELETE"/> <input type="button" value="CANCEL"/> </p> </div>
Disable Company Board	<p>When disabling a Company Board, it will no longer be accessible to any location that was set up to view it, except the location that created it originally. The board will be converted to a Shop Board.</p> <div data-bbox="607 1344 1218 1558" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="color: #0070c0;">Disable company board</p> <p style="text-align: right; color: #c00000;">⚠</p> <p>Disabling this company board will remove the board from all assigned locations except Cerritos. Disable as company board?</p> <p style="text-align: right;"> <input type="button" value="DISABLE"/> <input type="button" value="CANCEL"/> </p> </div>

Continued on next page

CCC® Production Boards - Manage Company Boards, Continued

Validation Messages

The following **Validation Messages** may appear when configuring your **Company Boards**.

Part	Description
Configure centralized phases	<p>To set up a Company Board, the MSO should use the centralized repair plan phases. These phases are set up in Settings at the repairer level.</p> <div data-bbox="560 531 1263 842" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="color: #0070c0; font-weight: bold;">Configure centralized phases</p> <p>Centralized phases are not configured for your organization. To enable a company board, please configure repair plan phases for your company.</p> <p>Learn more ➔</p> <p style="text-align: right; margin-top: 10px;">OK</p> </div> <p>Note: At present, centralized repair plan phases are configurable exclusively within CCC ONE® Desktop, configured at the repair level in Settings. These configuration options have not yet been made available on cccone.com.</p>
Unable to apply	<p>Each Company Board is required to have a unique name. Board names may not be duplicated on any other board at assigned locations.</p> <div data-bbox="560 1108 1263 1365" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="color: #0070c0; font-weight: bold;">Unable to apply</p> <p style="text-align: right; color: #c00000; font-size: 24px;">⚠</p> <p>Another board with the same name exists at one or more of the assigned locations.</p> <p style="text-align: right; margin-top: 10px;">OK</p> </div>
Unable to apply	<p>To use the board as a Company Board, make sure the Estimator and Technician/Team filters are both set to All.</p> <div data-bbox="560 1476 1252 1724" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="color: #0070c0; font-weight: bold;">Unable to apply</p> <p style="text-align: right; color: #c00000; font-size: 24px;">⚠</p> <p>To enable a company board, filtering by Estimator and Technician/team must be set to "All."</p> <p style="text-align: right; margin-top: 10px;">OK</p> </div>