#### **Carwise® - Configuring Shop Scheduling**

Introduction Shop Scheduling allows consumers to add estimating appointments to their calendar from their Carwise.com webpage. Follow this guide to configure CCC ONE to receive Consumer Appointments properly.

Accessing Shop To access the Carwise configure settings start by logging in to CCC Configuration ONE<sup>®</sup> then:

Step	Action
1	Select Configure.
2	Then select <b>My Account</b> ; the My Account settings page opens in cccone.com.
3	Select the back arrow to access the <b>Settings</b> page.
4	Select the <b>Carwise Profile</b> icon.

Shop The Carwise Profile configuration section is where users can Enable/Disable Appointment Consumer Estimate appointments or Repair appointments and further Configuration configure appointment durations.

Step	Action
1	Select <b>Configure</b> (Use the slider to <b>Enable</b> if necessary), in the <b>Online estimate</b> (repair) appointments with Carwise section.
	Configure calendar availability

Continued on next page



**LEARNING** ©2017-2022. CCC Intelligent Solutions Inc. All rights reserved. SERVICES CCC<sup>®</sup> is a trademark of CCC Intelligent Solutions Inc.

#### Carwise® – Configuring Shop Scheduling, Continued

#### **Shop Appointment** Configuration, continued

Step Action In the Estimate appointments section change the time in the Appointment 2 **Duration** in the drop-down menu. Edit Online Scheduling Settings - DEMO ESTIMATING Estimate appointments C Enabled 1 hour When enabled, consumers can book estimate appointments online via Carwise.com. These appointments automatically appear on the CCC ONE calendar Carwise computes capacity based on CCC ONE settings for store hours, appointment slots, estimator schedules, and availability. 3 In the Repair appointments section change the time in the Appointment Duration. The Earliest Appointment Available drop-down menu allows shops to configure how soon they will regularly be able to accept Repair appointments. Shops can require Repair appointments to be scheduled for as early as today or to be booked from 1-180 days in advance. Repair appointments C Enabled 1 hour When enabled consumers can book repair appointments poline with via C automatically appear on the CCC ONE calendar Today + 2 days 0 Carwise computes capacity based on CCC ONE settings for six and availability. In the **Calendar flexibility** section change the flexibility in the drop-down menu. 4 • Flexible: (allows for over booking) More appointments than available estimators can be booked. • Exact: (Default) Available appointment slots match the number of estimators. • Strict: (prevents stacking) Only one appointment per time slot can be booked, regardless of available estimators. Calendar flexibility Carwise uses store hours: appointment slots. estimator schedules. and availability to compute capacity. Custon calendar by changing the flexibility setting. Flexible (allows o Exact (default) 5 Select an Appointment **time slot** from the drop-down menu for the desired day.

Continued on next page



#### Carwise® - Configuring Shop Scheduling, Continued

#### **Shop Appointment**

Configuration, continued

Step	Action
6	Click <b>Save</b> when finished editing the Carwise settings.
APPOINTMENT SLO	75

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
CLOSED	9:00 AM 🔻	9:00 AM 👻	9:00 AM 👻	9:00 AM 👻	9:00 AM 💌	Select 👻
5	9:00 AM 9:15 AM	10:00 AM 👻	10:00 AM 👻	10:00 AM 💌	10:00 AM	Select 💌
0	9:30 AM 9:45 AM 10:00 AM	11:00 AM 👻	11:00 AM 👻	11:00 AM 👻	11:00 AM 👻	Select 👻
	10:15 AM	1:00 PM 👻	1:00 PM 👻	1:00 PM 👻	1:00 PM 👻	Select 💌

The shop's Carwise.com profile will show the time slots the consumer can select.





©2017-2022. CCC Intelligent Solutions Inc. All rights reserved. CCC<sup>®</sup> is a trademark of CCC Intelligent Solutions Inc. 3

# **CCC® Scheduling – Insurance Appointment Configuration**

Introduction	Insurance Scheduling allows certain insurance companies to add estimating appointments to your calendar. Follow this section of the guide to configure CCC ONE to properly receive Insurance Appointments.
Return to Insurance	Follow these steps to return to the <b>Insurance Settings</b> page after making edits in the <b>Carwise Profile:</b>

Step	Action				
1	Click the back arrow from the Carwise Profile page.				
	Settings Carwis	> Carwise Profil se Profile	e		
2 Select <b>Insurance Companies</b> from the Settings page.					
		G			@ Q wa
	Settings				
		Search		٩	
	6				
	Carwise Profile Manage information displayed to consumers on Carwise.com.	Central Review Manage Conference Settings	Checklist Regions Manage ger and saftrage for checklist	Checklist Template Manage the standard workfile checklart for your angarization	Estimating Options Manage estimating options for your shop.
		R	÷		Â
	Insurance Companies Manage settings for insurance company relationships.	My Account Manage account information, user writings and password.	Network Profile Manage location information visible to comparence, OBMS, and insurance comparies,	Note Types Manage workfile role types for your regarization.	Notification Geoups Manage and groups to receive specific retrifications
	i T	í.	ы	of the second	14

Continued on next page



Settings

©2017-2022. CCC Intelligent Solutions Inc. All rights reserved. CCC° is a trademark of CCC Intelligent Solutions Inc. 4

## CCC® Scheduling - Insurance Appointment Configuration, Continued

Follow the steps below to access the configure settings after logging into CCC Accessing Insurance ONE: Configuration

Step	Action
1	Select the <b>menu</b> icon.
	C CCC ONE
	New - View -
	2 Quick Start
	& My Work
	Customer Experi
	Production Sche
	📰 Calendar
2	Select <b>Calendar</b> from the drop-down menu. The Calendar view opens.
3	Click the <b>Insurance Appointment Settings</b> link, from the left side panel of the Calendar view. The configurations page opens automatically logging you in cccone.com.
	Calendar - Week View
	Calendar
	Unscheduled 43
	Unassigned 27 Overdue Appointments 27
	Exceptions 1
	R Customer Visits 0
	Insurance Appointment Settings 7

Continued on next page



©2017-2022. CCC Intelligent Solutions Inc. All rights reserved. CCC<sup>®</sup> is a trademark of CCC Intelligent Solutions Inc. 5

## CCC® Scheduling - Insurance Appointment Configuration, Continued

#### Accessing Insurance

Configuration, continued

Step	Action					
4	On the <b>Insurance Settings</b> configuration page in the <b>Settings</b> section, select an <b>Insurance Company</b> in the search field.					
	Settings > CCC INSURANCE COMPANY Insurance Settings					
	4 CCC INSURANCE COMPANY Q SETTING LOCATIONS 6 Setting Appointments When enabled, the insurance carrier may book estimate appointments directly to the CCC ONE calendar. CCC ONE computes appointment availability based on store hours, estimator schedules, and location settings 5 Dissolver Papair Appointments When enabled, the insurance carrier may book repair appointments directly to the CCC ONE calendar. CCC ONE computes appointment availability based on store hours, estimator schedules, and location settings					
5	Move the slider to <b>Enable</b> the <b>Estimate Appointments</b> and <b>Repair</b> <b>Appointments</b> . A repair facility location must be configured to receive					
	Appointments.					
6	Select Locations.					
7	Select the Location Name.					
8	Click Edit to return to the Location Settings for selected location.					
9	The estimator scheduling function allows shops to route insurance assignments to specific estimators. If they have a preference, they can select a <b>Primary</b> <b>Estimator</b> from the drop-down, as well as a <b>Secondary Estimator</b> . Select a Primary Estimator from the drop-down. A Secondary Estimator may also be set if desired.					
	insurance job, they can keep this preference at to <b>Any Available Estimator</b> .					
10	The Scheduling Rules allow shops to determine how flexible they want the availability to be on their calendar. Max Appointments per Day/ Week from the insurance company can be set using the sliders, the default is set to <b>No Limit</b> .					

Continued on next page

# CCC® Scheduling - Insurance Appointment Configuration, Continued

#### Accessing Insurance

Configuration, continued

Step	Action
11	The Non-drivable vehicle settings allow shops to <b>Enable</b> or <b>Disable</b> Non-drivable vehicle scheduling. When Enabled, the insurance carrier may schedule appointments for non-drivable vehicles for this location.
12	Click <b>Save</b> , when finished editing the location settings.

R	Estimator scheduling CCC ONE will automatically book appointments with estimators based on the following coverage rules 9 Secondary Estimator Chad Smith
11	Scheduling Rules CCC ONE will limit the number of appointments available to the insurance carrier based on defined capacity thresholds. ID Max Appointments Per Day No Limit Max Appointments Per Week No Limit
Enabled	Non-drivable vehicles When enabled, the insurance carrier may schedule appointments for non-drivable vehicles for this location.  12 SAVE CANCEL



©2017-2022. CCC Intelligent Solutions Inc. All rights reserved. CCC° is a trademark of CCC Intelligent Solutions Inc. 7