

Shop Scheduling – Insurance Appointments

Introduction

Shop Scheduling allows insurance companies that are enabled for scheduling to add estimating appointments to your calendar if your shop has been configured to accept them.

Appointment workfiles can be identified in the Workfiles View, with Inbox notifications, within the Workfile as well as on the Calendar. This job aid will show you how to identify appointments sent from the insurance company to your repair facility known as Insurance Appointments and what you can do with an appointment.

Workfile View

Insurance Appointments are created by the insurance company for your repair facility. These appointments will appear in the Workfiles view. They can be identified by the description in the Updates column and the Workfile preview panel. The Action drop-down menu item of a selected Insurance Appointment has the following options: Assign Estimator, Accept Opportunity, Convert to Repair Order, Merge or Delete.

The screenshot displays the CCC ONE software interface. The top navigation bar includes 'New', 'View', 'Action', and 'Recent'. The main area is titled 'New Open Opportunities' and contains a table with columns: Opportunity, Linked, Priority, Estimated Amount, Number, Owner, Primary Phone, Vehicle, Estimate \$, Insurance Company, Claim Number, and Estimator. A row is highlighted with a blue background, and a blue arrow points to the 'Insurance Appointment' entry in the Opportunity column. Below the table, a preview panel for the selected appointment is shown, with a blue arrow pointing to a pop-up window titled 'INSURANCE APPOINTMENT'. The pop-up window displays the following information: Insurer: CCC PDM COMPANY, Owner: Appointment Test, Vehicle: 2021 BENZ AMG GT 63 S, and Claim #: 99-9999-999.

Opportunity	Linked	Priority	Estimated Amount	Number	Owner	Primary Phone	Vehicle	Estimate \$	Insurance Company	Claim Number	Estimator	
Insurance Appointment					Test Appointment(995) 999-9999	Cell	2021 BENZ AMG GT 63 S	0.00	CCC PDM Company	99-9999-9999		
Supplement Assignment					CUSTOMER (555) 555-1212	Cell	2016 MCLLA 475L7	0.00	CCC PDM Company	99-9999-9999		
New Assignment					CUSTOMER (555) 555-1212	Cell	2017 RFI 035 Sedan Sp.	2,315.84	CCC PDM Company	99-9999-9999		
Cancel Invoice					CUSTOMER (555) 555-1212	Cell	2012 TOYOTA Highlander 4.	0.00	CCC PDM Company	99-9999-9999		
New Assignment					CUSTOMER (555) 555-1212	Cell	2014 TOYOTA Prius Four	960.13	CCC PDM Company	99-9999-9999		
Supplement Assignment					582	CUSTOMER (555) 555-1212	Cell	2021 RAM 1500 Big Horn.	13,873.83	CCC PDM Company	99-9999-9999	
New Assignment					ED1	CUSTOMER (555) 555-1212	Cell	2018 DODGE Challenger S.	0.00	CCC PDM Company	99-9999-9999	
New Assignment					ED1	CUSTOMER (555) 555-1212	Cell	2005 CHRY 300	0.00	CCC PDM Company	99-9999-9999	
New Assignment					ED1	CUSTOMER (555) 555-1212	Evening	2008 FORD EDGE	0.00	CCC PDM Company	99-9999-9999	
New Assignment					ED1	CUSTOMER (555) 555-1212	Evening	2019 CHRY Pacifica Hyb.	0.00	CCC PDM Company	99-9999-9999	
New Assignment					ED1	CUSTOMER (555) 555-1212	Business	2014 CHEV Equinox LT1	0.00	CCC PDM Company	99-9999-9999	

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Inbox Insurance appointment notifications will also appear in your inbox. Here you can see your Received, Cancelled and Updated Insurance Appointments.

Part	Action
1	Click the envelope icon to access your Inbox.
2	Click Insurance Companies to show only your notifications from Insurance Companies.
3	Click to View or Delete the selected notification. If View is selected the Message dialog box will appear displaying additional appointment information.

The screenshot displays the CCC ONE application interface. At the top, there's a navigation bar with 'New', 'View', 'Action', and 'Recent' options. Below this, the user is logged in as 'Demo Corp'. The main area is titled 'My Inbox - Insurance Companies' and shows a list of messages. A left-hand navigation pane lists various categories like 'My Tasks', 'My Inbox', 'CCC', 'Customers', 'Co-workers', 'Insurance Companies', 'Open Shop Assignments', 'DRP Assignments (30 days)', 'Payments', and 'Vendors'. The 'Insurance Companies' category is selected and highlighted in blue. A message titled 'Insurance Appointment Received' is selected, and a dialog box is open showing details: 'From: CCC PDM COMPANY', 'Owner: Test, Appointment', 'Vehicle: 2021 BENZ AMG GMT', and 'Appt: 08/10/2022 06:45 AM'. The dialog also includes a 'View Workfile' link and an 'OK' button. Three numbered callouts are present: '1' points to the envelope icon in the top right, '2' points to the 'Insurance Companies' filter in the left pane, and '3' points to the 'View' button in the message list.

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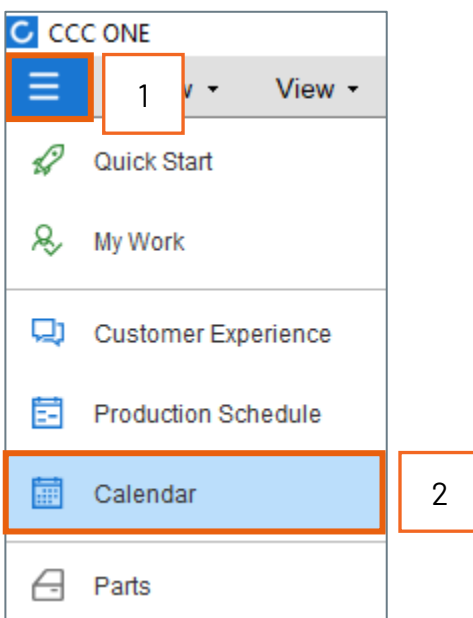
Shop Scheduling – Insurance Appointments, Continued

Accessing Calendar

Insurance Appointments automatically display in your repair facility's calendar when they are assigned by the insurance company as Estimate Appointments.

Use the following to access your calendar:

Step	Action
1	Select the menu icon.
2	Then select Calendar . The Calendar view opens.



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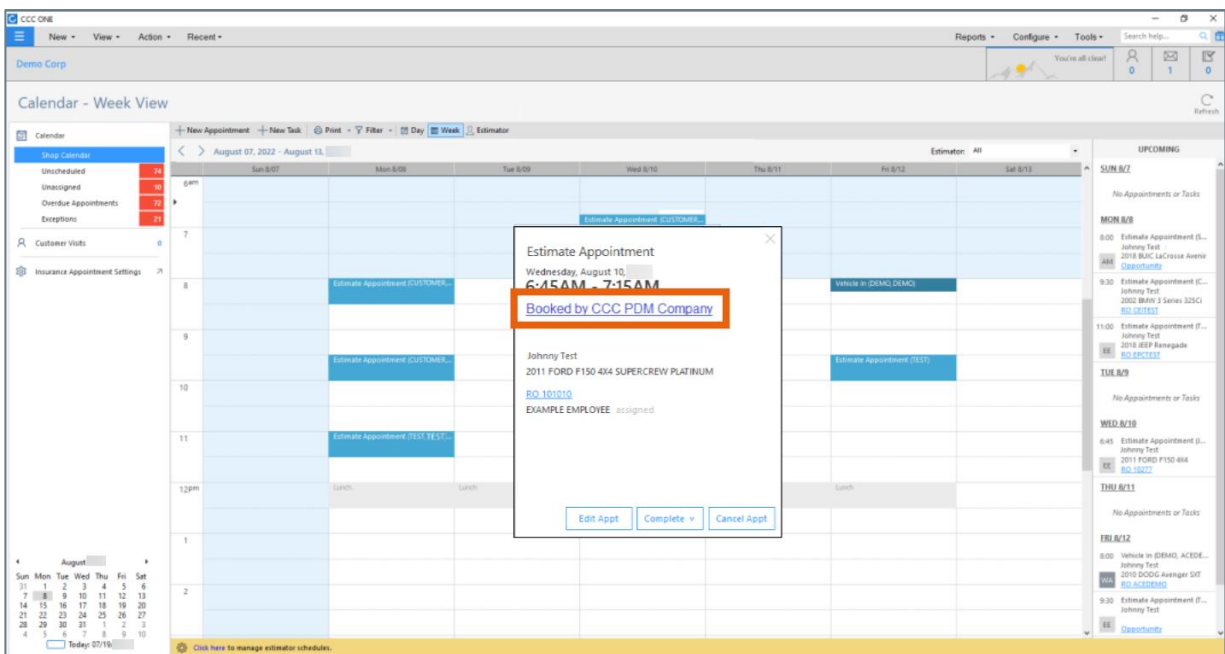
Shop Scheduling – Insurance Appointments, Continued

Accessing Calendar, continued

The calendar shows your location’s Estimate Appointments. Click an appointment to view additional information about that appointment. An Insurance Appointment will display “Booked by” with the insurance company name underneath the appointment time.

The Appointment view details include:

- Who booked the appointment. Booked by = Insurance Company.
- The assigned estimator.
- Vehicle and claim information.
- Actions to Edit, Complete or Cancel the appointment.



The customer will receive a notification if you or the insurance company update the appointment as long as the communication preference was setup on the workfile. The Insurance Company will not receive a notification if you change the appointment with the customer.