

Shop Scheduling - Configuration

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. Follow this guide to configure CCC ONE® to properly receive Insurance Appointments.

Accessing Configure Settings

To access the configure setting start by logging in to CCC ONE® then:

Step	Action
1	Select the menu icon .
2	Select Calendar . The Calendar view opens.
3	Click the Insurance Appointment Settings link, from the left side panel of the Calendar view. The configurations screen opens automatically logging you in cccone.com.

The screenshot shows the CCC ONE interface. In the top left, a blue menu icon is highlighted with a red box and labeled '1'. Below it, the left sidebar contains several options: 'Quick Start', 'My Work', 'Customer Experience', 'Production Sched', 'Calendar', and 'Parts'. The 'Calendar' option is highlighted with a blue background and a red box labeled '2'. Below the sidebar, the 'Calendar - Week View' is displayed. In the bottom left of this view, a settings gear icon next to 'Insurance Appointment Settings' is highlighted with a red box and labeled '3'.

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Insurance Company Configurations

In the **Insurance Companies** configuration screen, the **Scheduling** section shows all insurance companies that have been enabled for Insurance Scheduling. The columns indicate the number of shops with Scheduling Enabled, Not Configured, and Scheduling Disabled. Select an Insurance Company that needs to be configured. A repair facility location must be configured to receive Insurance Appointments.



Configured



One or more shops need to be configured

INSURANCE COMPANY	SCHEDULING ENABLED	SCHEDULING NOT CONFIGURED	SCHEDULING DISABLED	CONFIGURATION STATUS
CCC INSURANCE COMPANY - NORTH	6	1	0	1 location needs attention
CCC INSURANCE COMPANY - SOUTH	6	0	1	Configured

Schedule Settings

The Scheduling Settings section shows all locations in your organization. If there is no DRP agreement, the location is automatically set to Open Shop. Select **Configure** to edit the Schedule Rules for the desired location. Filters can be used to narrow the visible locations.

#	LOCATION NAME	STATE	TYPE	STATUS	MODIFIED DATE
10	ANAHEIM	CA	Open Shop	Enabled	11/28/2017
10	Bumpus Mills	CA	Open Shop	Enabled	9/21/2017
10	BOSTON	NY	Open Shop	Configure	
10	Calistoga	WV	Open Shop	Enabled	9/21/2017
10	Charlotte	MA	Open Shop	Enabled	9/21/2017
10	TEST	IL	Open Shop	Enabled	9/20/2017
10	Lakewood	CA	Open Shop	Enabled	9/21/2017

7 results

FILTERS

- Location ID
- Location Name
- State
- Type
- Status

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Edit Schedule Rules

In the **Edit Schedule Rules** section, make a selection based on the repair facility's specifications for accepting appointments from the insurance company.

Part	Description
1	Repair facilities with Contact Center will see a warning message. Insurance assignments with a booked appointment will auto-dispatch directly to the repair facility and cannot be manually dispatched through Contact Center.
2	Insurance and Non-Drivable Vehicle Appointments can be Enabled or Disabled .
3	Max Appointments per Day/ Week from the insurance company can be set using the sliders, the default is set to No Limit .
4	Select a Primary Estimator from the drop-down list. A Secondary Estimator may also be set if desired. If neither Estimators are available, the appointment will be labeled as unassigned.
5	Click Save , when finished editing to Configure the location.

The screenshot shows the 'Edit Schedule Rules' configuration page for the BOSTON location, associated with CCC INSURANCE COMPANY - NORTH. The page is divided into several sections:

- 1**: A warning message: "Insurance assignments with a booked appointment will auto-dispatch directly to the repair facility and cannot be manually dispatched through Contact Center."
- 2**: **INSURANCE APPOINTMENTS** section, where the "Enabled" toggle is checked.
- 4**: **ESTIMATOR SCHEDULING** section, where "John Doe" is selected as the Primary Estimator and "Jane Doe" is selected as the Secondary Estimator.
- 3**: **MAX APPOINTMENTS PER DAY** and **MAX APPOINTMENTS PER WEEK** sections, both set to "No Limit" with sliders.
- 5**: The "SAVE" button at the bottom right of the configuration area.