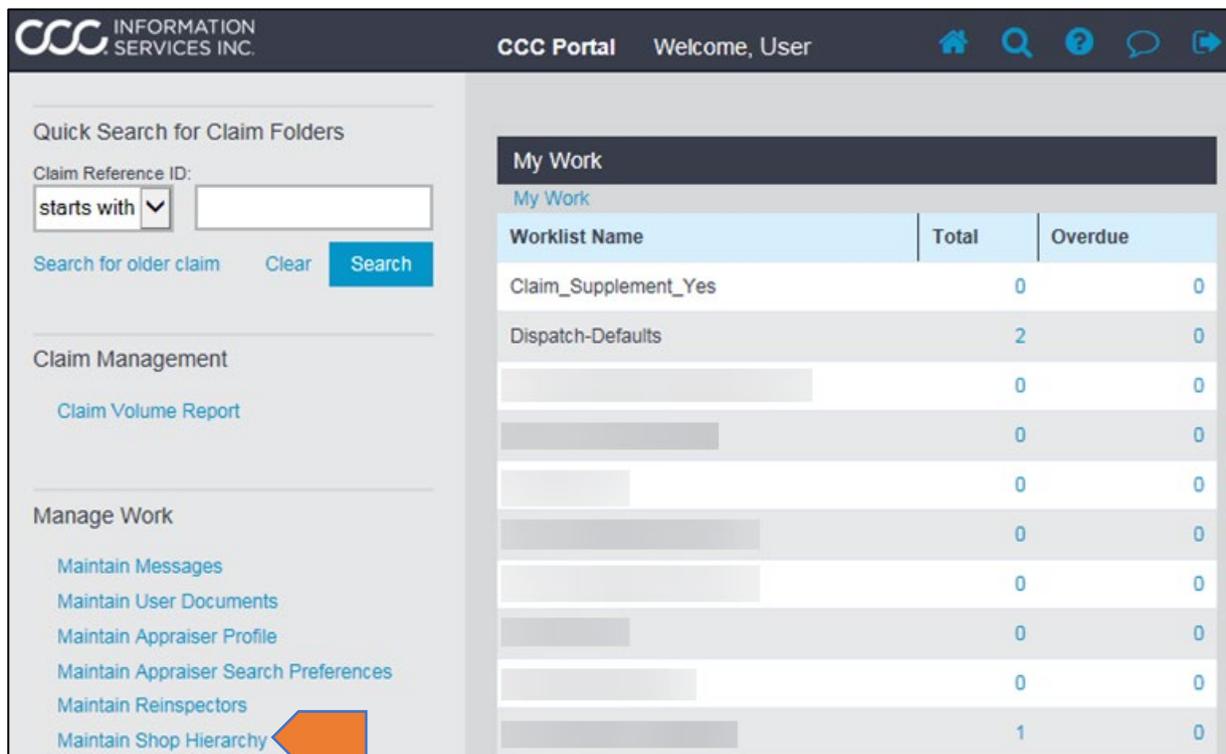


# Maintain Shop Manager and User Hierarchy

**Introduction** Maintain Shop Manager and User Hierarchy is a Portal feature that allows Insurance Carriers to assign Portal users as shop Managers and to maintain shop-to-manager relationships. It also allows individual users to maintain their profile information, which consists of their Supervisor’s name and the user’s contact details (i.e., phone number and email address). Supervisor users can view the hierarchy of their subordinates and the shops assigned to their subordinate users.

Maintain Shop Hierarchy is a Portal component that manages relationships between RF shops and their Insurance Managers. It also maintains the hierarchies of Supervisors within the Insurer. This feature is the master of record for these relationships. Other CCC applications such as CCC® Connect, UpdatePlus, Parts, Configurable Workflow, and Analytics use this data.

**Access** To access the Maintain Shop Hierarchy feature, select the **Maintain Shop Hierarchy** link on the CCC Portal homepage.



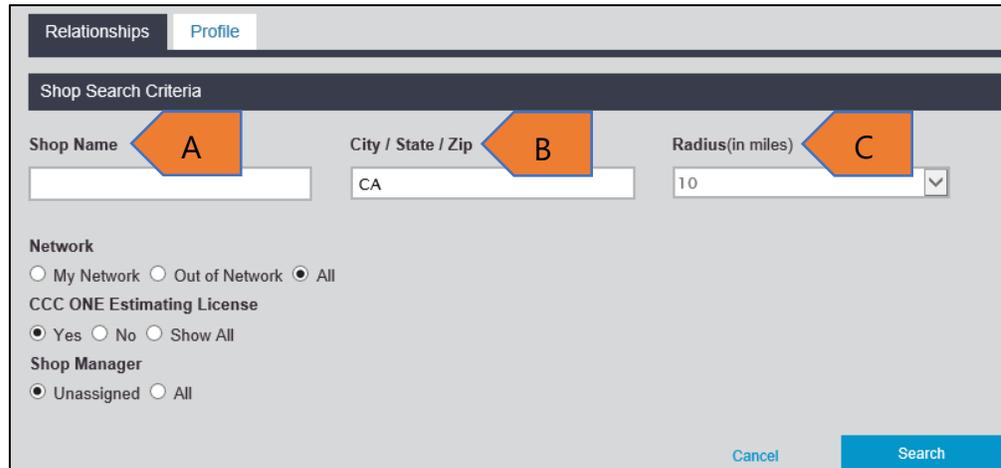
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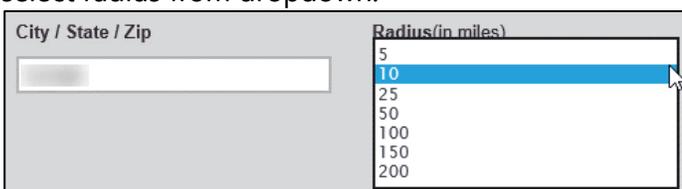
## Maintain Shop Manager and User Hierarchy, Continued

### Assign Shop Manager

Selecting Maintain Shop Hierarchy on the homepage opens the Assign Shop Manager search page to the **Relationships** tab.

You can search for shops by using the following criteria:



Field	Description
<b>A) Shop Name</b>	Search by shop name. You must enter a minimum of three characters.
<b>B) City, State / Zip</b>	Search by entering a combination of city and state, just state, or by zip code. If you choose by zip code, select radius from dropdown. 
<b>C) Radius</b>	You can select a radius (in miles) from the dropdown list. (The default is 10 miles for all but zipcode.)

Additional filters include:

Item	Description
Network	Choose from My Network, Out of Network, and All (All is selected by default).
CCC ONE Estimating License	Choose from Yes (default), No, and Show All. Choosing Yes will show only those shops with an active CCC ONE Estimating license.
Shop Manager	Choose from Unassigned (default) and All.

*Continued on next page*

## Maintain Shop Manager and User Hierarchy, Continued

### Assign Shop Manager, continued

Click the **Search** button to search for shops that meet your criteria.

The search results appear. Page through the results by clicking the arrows in the upper right corner.

Search Results								< 1 - 10 of 13 >
<input type="checkbox"/>	Shop	City/State	Zip Code	Shop Manager	Supervisor	Network	CCC ONE License	
<input type="checkbox"/>	Repair Facility 1	CHICAGO, IL	60654			Yes	Yes	
<input type="checkbox"/>	Repair Facility 2	CHICAGO, IL	60654			No	Yes	
<input type="checkbox"/>	Repair Facility 3	CHICAGO, IL	60654			Yes	Yes	
<input type="checkbox"/>	Repair Facility 4	CHICAGO, IL	60654			No	Yes	
<input type="checkbox"/>	Repair Facility 5	CHICAGO, IL	60654			No	Yes	
<input type="checkbox"/>	Repair Facility 6	CHICAGO, IL	60612			No	Yes	
<input type="checkbox"/>	Repair Facility 7	CHICAGO, IL	60657			No	Yes	
<input type="checkbox"/>	Repair Facility 8	CHICAGO, IL	60614			No	Yes	
<input type="checkbox"/>	Repair Facility 9	CHICAGO, IL	60651			No	Yes	
<input type="checkbox"/>	Repair Facility 10	CHICAGO, IL	60647			No	Yes	

Assign As Shop Manager

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## Maintain Shop Manager and User Hierarchy, Continued

### Assign Shop Manager, continued

If no Shop Manager is assigned to a shop, the Shop Manager field will be empty (A). To assign yourself as the Manager for one (or more) of these shops, **tick the box** to the left of the shop's name (B) and click the **Assign As Shop Manager** button (C).

<input type="checkbox"/>	Shop	City/State	Zip Code	Shop Manager	Supervisor	Network	CCC ONE License
<input type="checkbox"/>	Repair Facility 1	CHICAGO, IL	60654			Yes	Yes
<input type="checkbox"/>	Repair Facility 2	CHICAGO, IL	60654			No	Yes
<input type="checkbox"/>	Repair Facility 3	CHICAGO, IL	60654			Yes	Yes
<input checked="" type="checkbox"/>	Repair Facility 4	CHICAGO, IL	60654			No	Yes
<input type="checkbox"/>	Repair Facility 5	CHICAGO, IL	60654			No	Yes
<input type="checkbox"/>	Repair Facility 6	CHICAGO, IL	60612			No	Yes
<input type="checkbox"/>	Repair Facility 7	CHICAGO, IL	60657			No	Yes
<input type="checkbox"/>	Repair Facility 8	CHICAGO, IL	60614			No	Yes
<input type="checkbox"/>	Repair Facility 9	CHICAGO, IL	60651			No	Yes
<input type="checkbox"/>	Repair Facility 10	CHICAGO, IL	60647			No	Yes

Assign As Shop Manager

A popup appears. To finish assigning yourself as the Shop Manager, select

Are you sure you want be assigned as the Shop Manager for the selected shop(s)?

Yes No

**Yes.** (Alternately, select **No** to cancel the assignment.)

A confirmation message appears.



**Success**  
The Assign as Manager operation has been performed successfully on selected shop(s).

**NOTE:** Clicking the **Assign As Shop Manager** button before ticking any boxes (see Step B above) will return an error message.



**Error**  
Please select at least one shop to perform Assign as Shop Manager operation.

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## Maintain Shop Manager and User Hierarchy, Continued

### Assign Shop Manager, continued

If you run your search after ticking **All** in the Shop Manager field (**A**), the Search Results screen will look slightly different: you see shops for which a Manager is assigned and those for which no Manager is assigned (**B**). If a Supervisor is assigned, his or her name will also appear in the neighbouring column.

The boxes to the left of shops to which a Manager is assigned are greyed out and are not selectable (**C**). The Assign As Shop Manager action cannot be performed for these shops.

**Network**  
 My Network  Out of Network  All

**CCC ONE Estimating License**  
 Yes  No  Show All

**Shop Manager**  
 Unassigned  All A

Cancel Search

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**Search Results** < 1 - 10 of 24 >

	Shop	City/State	Zip Code	Shop Manager	Supervisor	Network	CCC ONE License
<input type="checkbox"/>	Repair Facility 1	CHICAGO, IL	60604	Doe, John		No	Yes
<input type="checkbox"/>	Repair Facility 2	CHICAGO, IL	60606	Doe, Jake		No	Yes
<input type="checkbox"/>	Repair Facility 3	CHICAGO, IL	60654	Doe, Jill		Yes	Yes
<input type="checkbox"/>	Repair Facility 4	CHICAGO, IL	60654			Yes	Yes
<input type="checkbox"/>	Repair Facility 5	CHICAGO, IL	60654	Doe, Jack		Yes	Yes
<input type="checkbox"/>	Repair Facility 6	CHICAGO, IL	60654	Doe, Jorge		No	Yes
<input type="checkbox"/>	Repair Facility 7	CHICAGO, IL	60654	Doe, Jamal		No	Yes
<input type="checkbox"/>	Repair Facility 8	CHICAGO, IL	60654	Doe, Jose	Doe, Jane	No	Yes
<input type="checkbox"/>	Repair Facility 9	CHICAGO, IL	60654	Doe, Juan		No	Yes
<input type="checkbox"/>	Repair Facility 10	CHICAGO, IL	60654			No	Yes

Assign As Shop Manager

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## Maintain Shop Manager and User Hierarchy, Continued

**User Profile** Click on the **Profile** tab (A) to review and maintain your personal information.

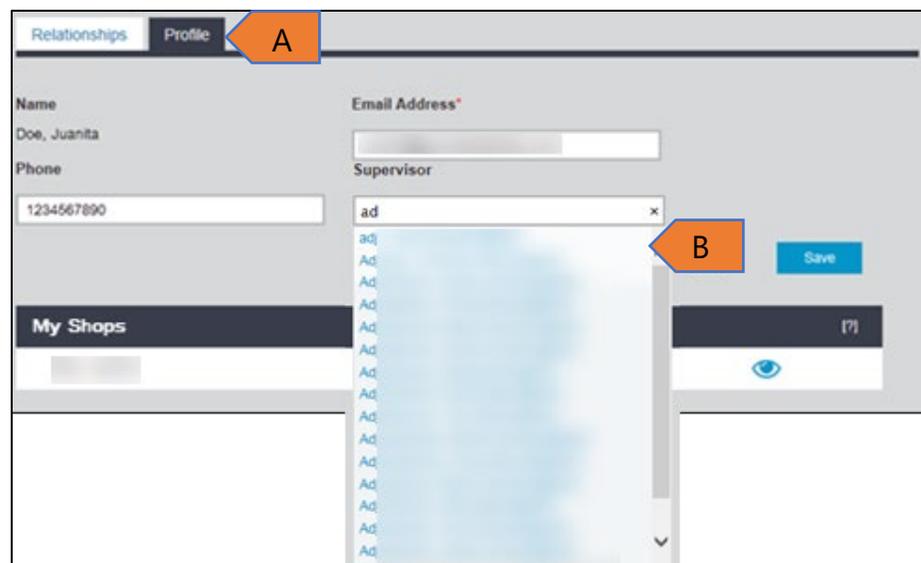
**NOTE:** Your name cannot be modified, and the **Email Address** field is required if any changes are made.

The following phone number formats are accepted in the **Phone** field:

- XXXXXXXXXXX
- XXX-XXX-XXXX
- XXX XXX XXXX
- (XXX)XXXXXXXX

To assign a Supervisor to yourself, begin typing their last name into the **Supervisor** field and select their name from the dropdown list (B).

**NOTE:** You cannot assign yourself as the Supervisor, and you must select a name from the dropdown list, i.e. you cannot manually enter a name. Users can assign five levels of Supervisor hierarchy; if you are the highest-level Supervisor in the hierarchy, you cannot add a Supervisor above yourself. If a Supervisor's name doesn't appear in the list, contact [registration\\_services@cccis.com](mailto:registration_services@cccis.com).



You must click **Save** to save your changes.

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## Maintain Shop Manager and User Hierarchy, Continued

### My Shops

You can view the shops to which you're assigned as Manager by clicking on the **View** icon to the right of your name. (If you don't see the icon on your screen, you are not assigned to a shop as Manager.)

The screenshot shows a user profile page with tabs for 'Relationships' and 'Profile'. The profile information includes Name (Doe, Juanita), Email Address (juanita@juanitasaddress.com), Phone (1234567890), and Supervisor. Below this is a section titled 'Doe, Juanita's Shops' with a list of shops. An orange arrow points to the 'View' icon (an eye) next to the shop name 'Doe, Juanita'.

A popup window appears.

To remove yourself as Manager from a shop, **tick the box** next to the shop's name (**A**) and click the **Remove as Shop Manager** button (**B**). (Alternately, click the **X** in the upper right corner of the popup window to dismiss it without making changes.)

The screenshot shows a 'My Shops' popup window with a table of shops. An orange arrow labeled 'A' points to the checkbox next to 'LOCATION A'. Another orange arrow labeled 'B' points to the 'Remove as Shop Manager' button below the table.

Shop	City/State	Zip Code
<input checked="" type="checkbox"/> LOCATION A	CHICAGO, IL	60654
<input type="checkbox"/> LOCATION B	CERRITOS, CA	90703

Once you click **Remove as Shop Manager**, another popup appears. Click **Yes** to confirm your removal as Manager from the selected shop(s). You will see a "success" message. Alternately, click **No** to dismiss the popup; no changes will be made.

**Delete All Shops:** You can also use the trash icon to remove all of a Manager's shops. This is useful if you need to remove all shops and there are more than 20.

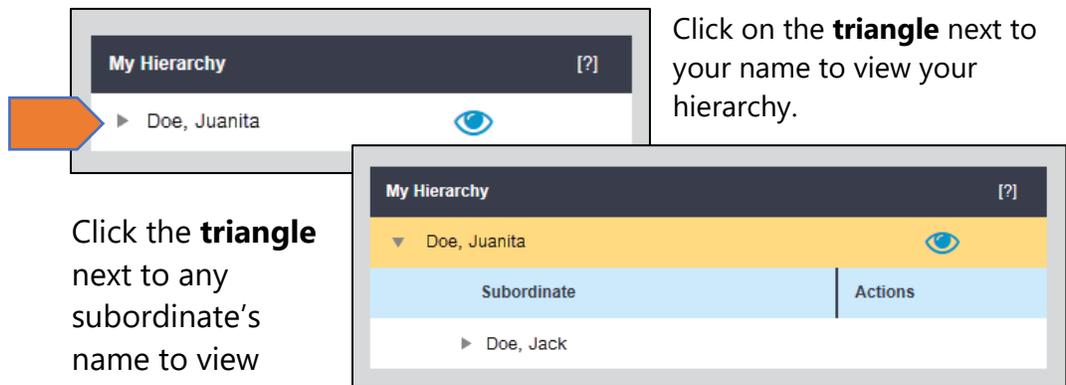
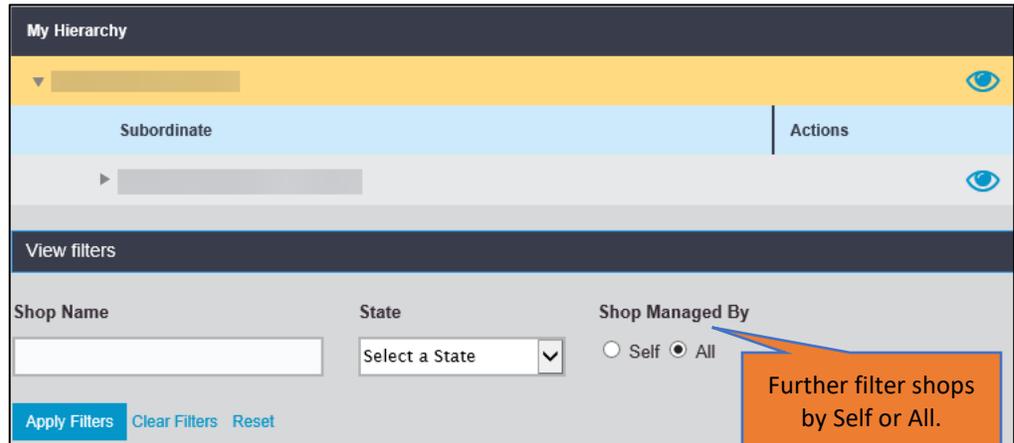
The screenshot shows a confirmation popup window titled 'Remove Shop(s)'. The text inside asks: 'Are you sure you want to remove Doe, Juanita as Manager for the selected shop(s)?'. There are 'Yes' and 'No' buttons at the bottom right.

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## Maintain Shop Manager and User Hierarchy, Continued

### My Hierarchy

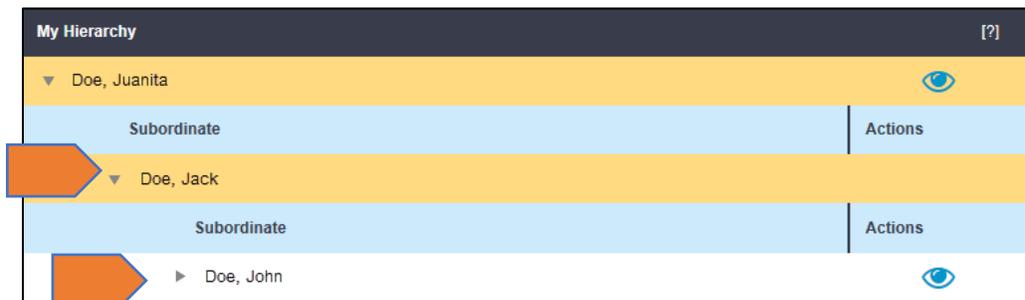
If you are a Manager or Supervisor responsible for at least one subordinate, you have access to the **My Hierarchy** zone.



Click on the **triangle** next to your name to view your hierarchy.

Click the **triangle** next to any subordinate's name to view their

subordinate(s). Click a **triangle** again to collapse the view.



View shops to which you're assigned as Manager by clicking the **View** icon to the far right of your name; view shops to which a subordinate is assigned as Manager by clicking the **View** icon to the far right of their name.



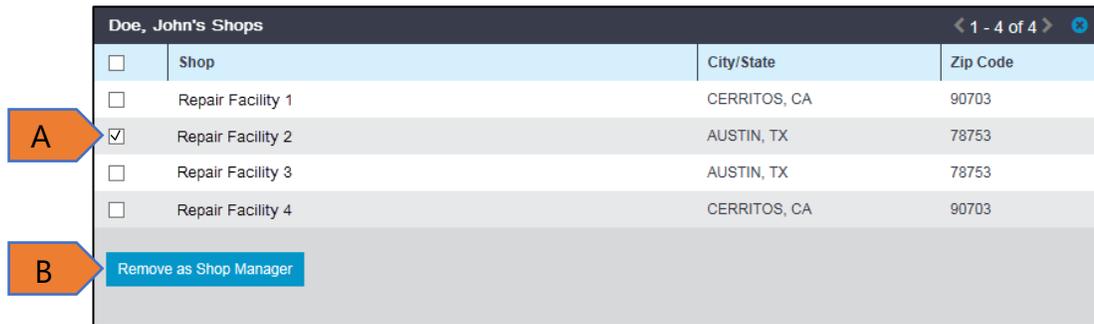
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## Maintain Shop Manager and User Hierarchy, Continued

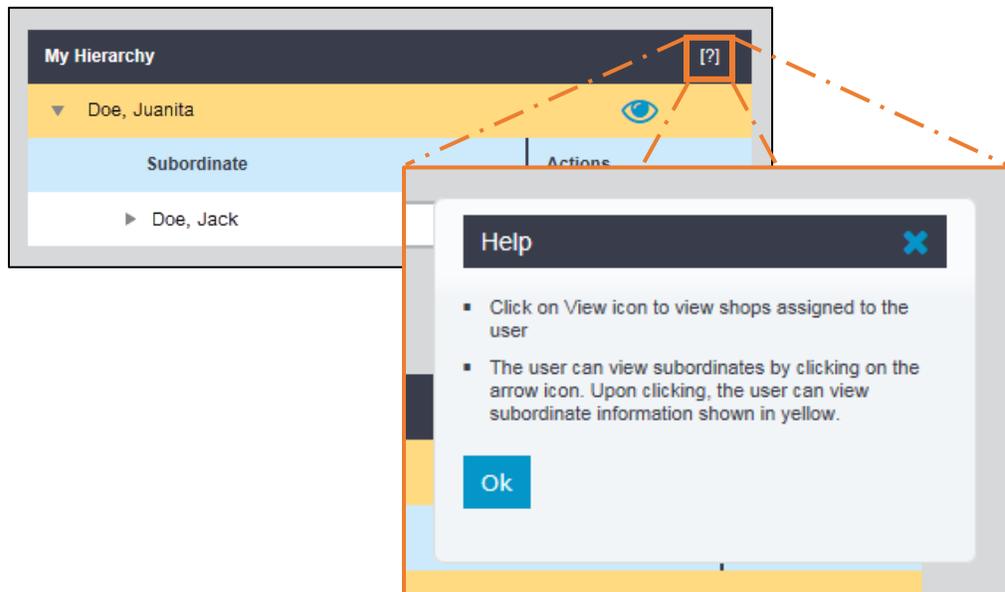
### My Hierarchy, Continued

Clicking the **View** icon next to a subordinate's name opens a popup window that displays the shop(s) to which they are assigned as Manager.

To remove a subordinate as Manager from a shop, **tick the appropriate box** (you can choose more than one) in the popup window's left column (**A**) and click **Remove as Shop Manager** (**B**). (Alternately, click the **X** in the upper right corner of the popup window to dismiss it without making changes.)



**NOTE:** Click the **Help [?]** icon from the **My Hierarchy** menu to reveal additional information.



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## Maintain Shop Manager and User Hierarchy, Continued

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### **Note to UpdatePlus Users**

The goal of Hierarchy Management is to create one central place to manage the shop-to-manager relationship. CCC ONE Connect, UpdatePlus, Parts, Configurable Workflow, Analytics, etc. use data from the hierarchy.

If you are an UpdatePlus user, your company must decide whether to manage your relationships in UpdatePlus *or* in Shop Hierarchy.

- **If you choose to manage your hierarchy in Shop Hierarchy**, you will no longer have access to the Manage Hierarchy feature in UpdatePlus. To maintain shop visibility, you must navigate to the Update Plus application.
  - **If you choose to manage your hierarchy in UpdatePlus**, you will have to manage the hierarchy through Hierarchy Management for the rest of your CCC applications.
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