

CCC® Schedule Manager 2.1

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CCC® Schedule Manager 2.1, continued

Overview

This document demonstrates how to open and use CCC® Schedule Manager version 2.1.

Note: Some Schedule Manager options may not be visible to all carriers. Carriers must have features enabled to use them.

Accessing Schedule Manager 2.1

Follow the steps below to access Schedule Manager 2.1:

Step	Action
1	Go to mycccportal.com from your browser.
2	Enter your User ID and Password .
3	Click Log In . The CCC Portal Welcome page opens.
4	Scroll down to Scheduling and select Schedule Manager 2.1 .

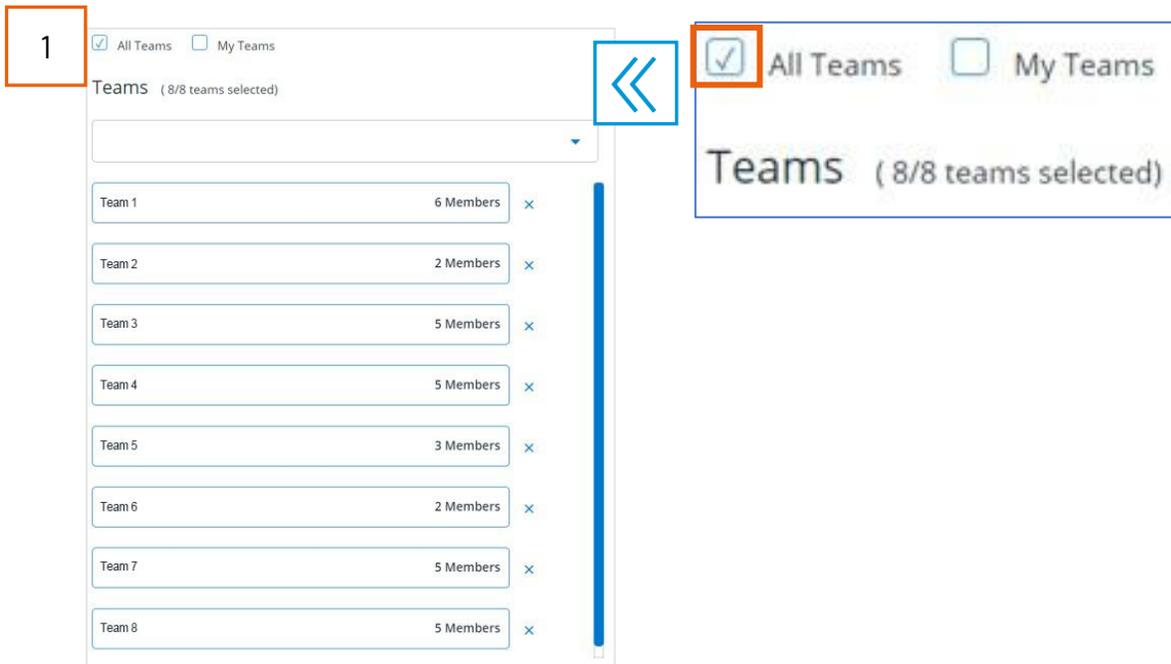
The image shows two screenshots from the CCC portal. The left screenshot is the login page with a blue header. It has a 'User ID' field with a person icon, a 'Password' field with a lock icon, a 'Forgot Password' link with a question mark icon, and a blue 'Log In' button. Orange boxes with numbers 2 and 3 are placed over the password field and the 'Log In' button, respectively. The right screenshot shows a 'Scheduling' menu with a light gray background. It lists several options: 'Create an Appointment', 'Schedule Manager 2.1', 'Schedule Manager Drive-In', 'Scheduling Settings', and 'My Appointments'. An orange box with the number 4 is placed over the 'Schedule Manager 2.1' option.

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CCC® Schedule Manager 2.1, continued

All Teams Checkbox

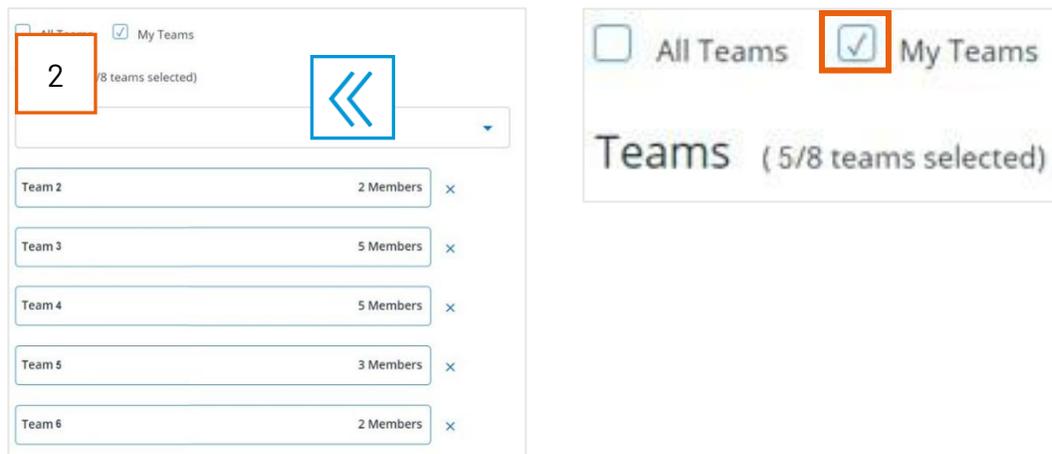
All Teams (1) allows you to select all teams configured in your system with one click of the “All Teams” checkbox at the top.



My Teams Checkbox

My Teams configuration lets you select all your pre-assigned (via scheduling settings) teams without searching through large lists and selecting them individually.

With one click, any teams that you saved as yours will automatically appear as selected when you click the **My Teams** checkbox (2).

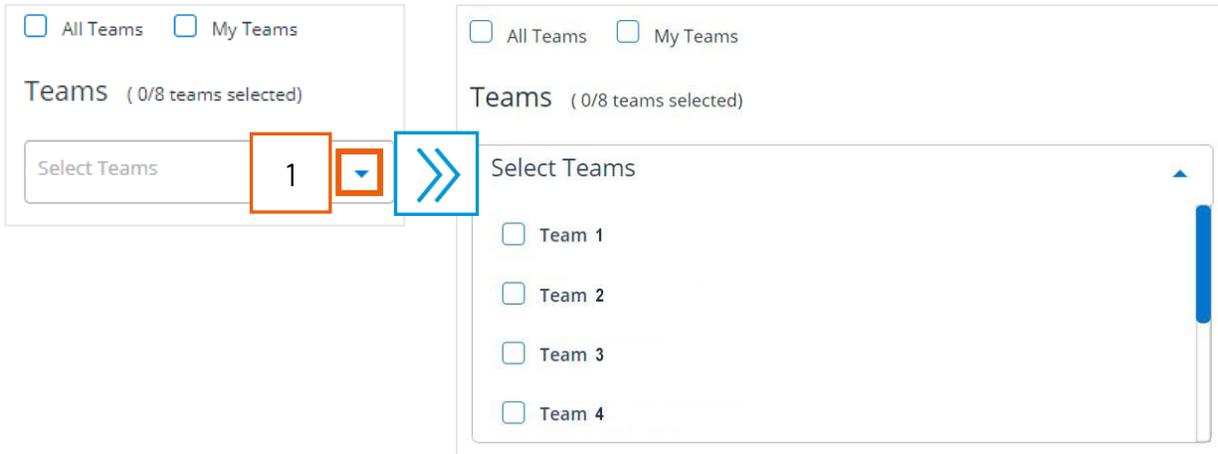


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CCC® Schedule Manager 2.1, continued

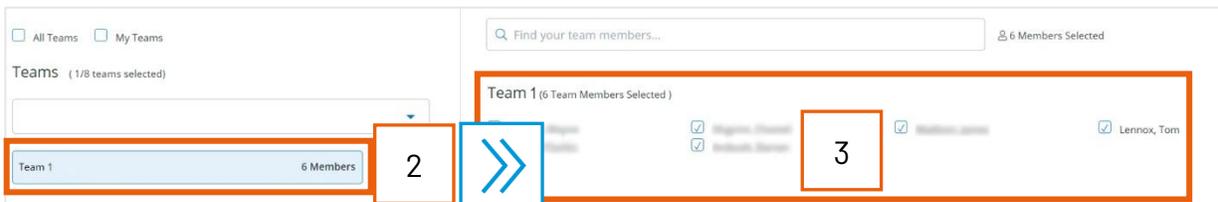
Selecting Teams

If you don't want to use All Teams or My Teams, you may select teams individually using the **Select Teams drop list (1)**.



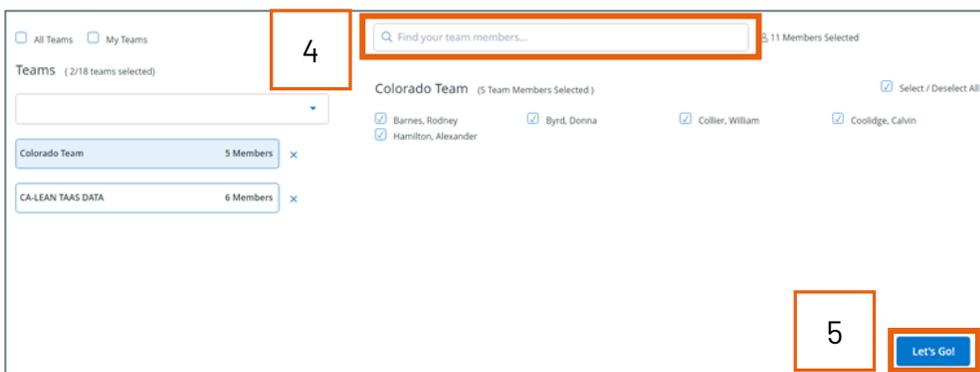
Selecting a Specific Team

Selecting a specific team **(2)** from the Select Teams options will select and display all the team members **(3)**.



Team Search

Team search (4) lets you search for specific members on a team and select individuals to view their schedules. Click on **Let's Go (5)** to view the schedules.

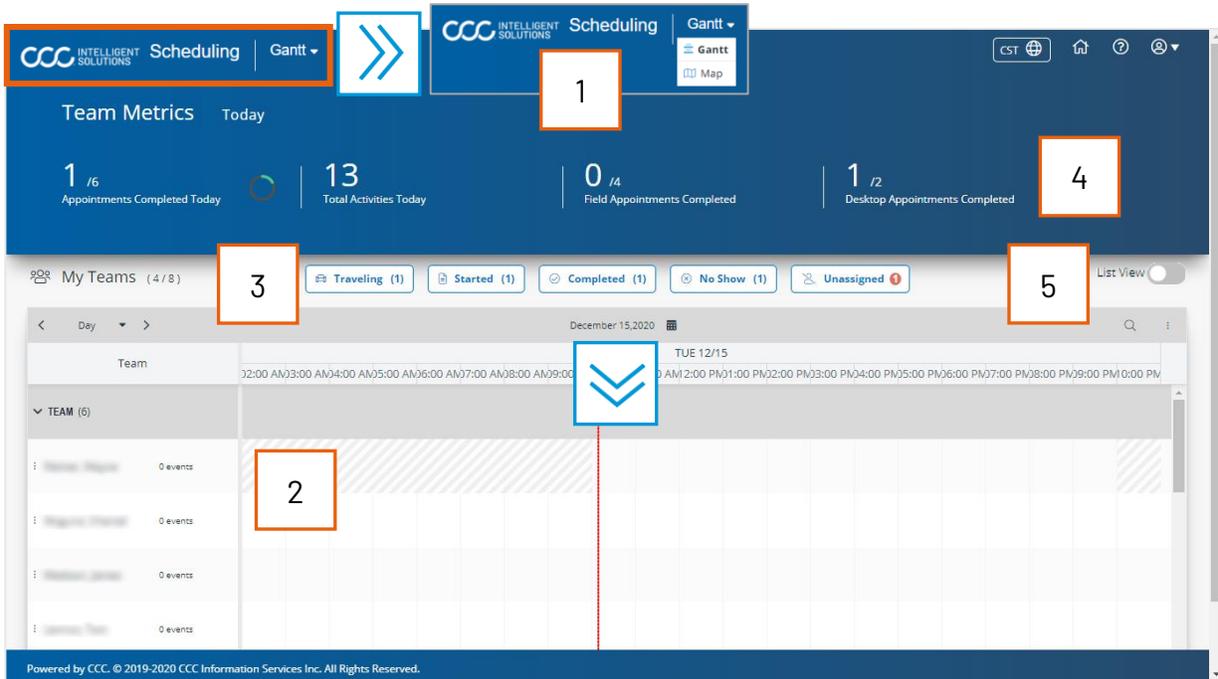


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CCC® Schedule Manager 2.1, continued

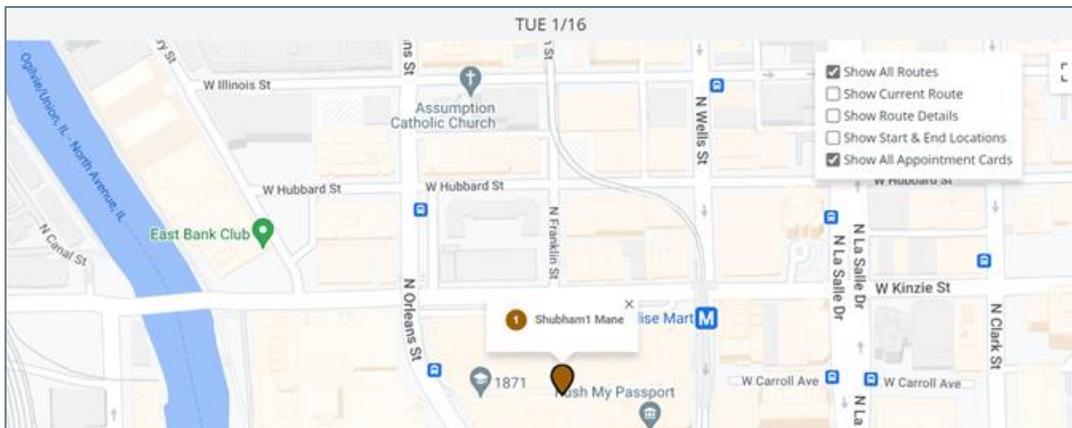
Gantt View

You may select one of two **viewing modes**: Gantt or Map (1). The **Gantt** view displays the schedule in a calendar view (2) with the ability to filter appointments by category (3). The top (4) of the dashboards displays a summary of relevant metrics for the day's appointments. The List View (5) toggled on will list the **Appointments** with their details.



Map View

The **Map** view displays the scheduled appointments on a map. **Note:** If a specific team member is selected in this view, the map displays the route for their appointments throughout the day.

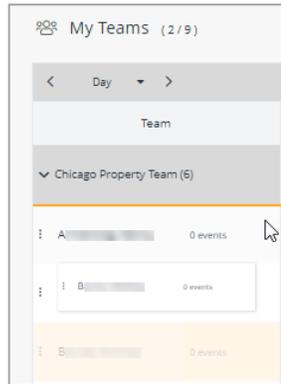


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CCC® Schedule Manager 2.1, continued

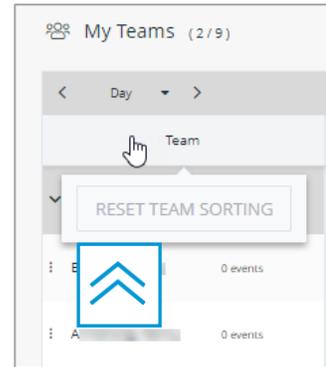
Gantt View - Reorder Appraisers

Appraisers in the Gantt view can be reordered by clicking and dragging them to the desired order. The same order will show in the Map view.



Note: The order for the team you set will only be applied to your account. Appraisers can only be reordered in the Gantt view. Appraisers cannot be dragged and dropped into another team.

To reset the Appraisers to their default alphabetical order, right click the **Team** header and click **RESET TEAM SORTING**.



Note: Resetting the team sort will be applied to all Teams selected in the My Teams view.

Schedule Manager Drive-In

Click on the link under Scheduling titled **Schedule Manager Drive-In**.

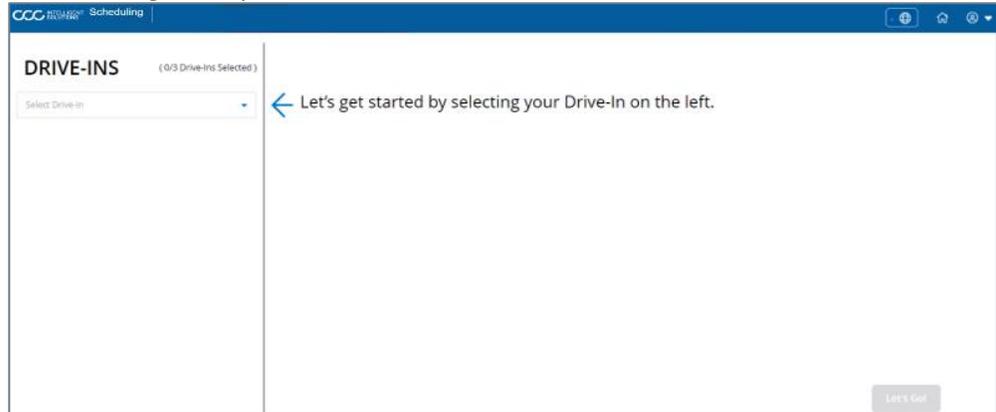


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CCC® Schedule Manager 2.1, continued

Schedule Manager Drive-In, Continued

Scheduling will open.

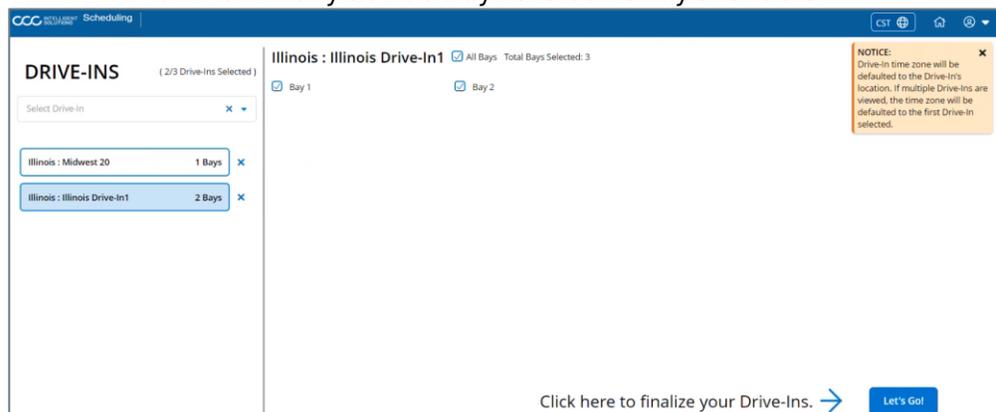


Scheduling

The user will choose from the **drop down** list the **Drive-In** facility they prefer.



This will show how many **active** Bays are currently available.



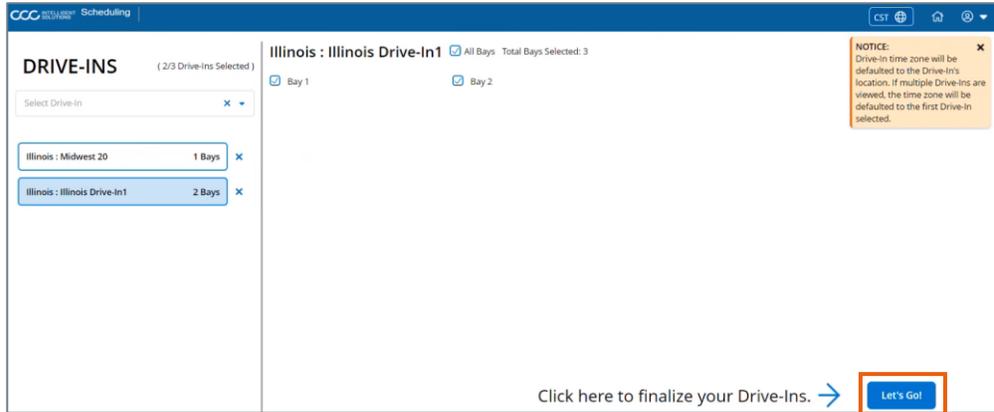
The user can select and deselect Bays here if needed.

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CCC® Schedule Manager 2.1, continued

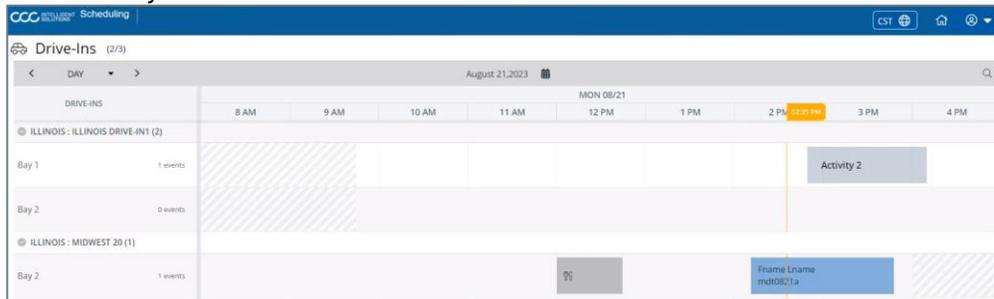
Scheduling, Continued

Next, the user will click **Let's Go!** at the bottom of the screen.

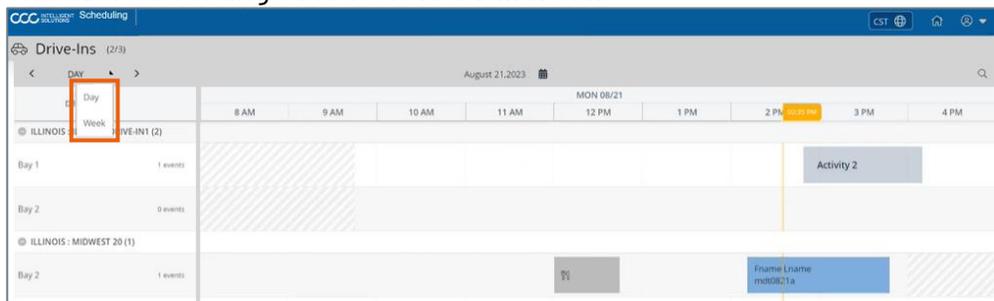


Appointments and Activities

The Gantt view for Drive-Ins will open. The calendar will **default** to the current day.



The user can change the view to a **full week**.

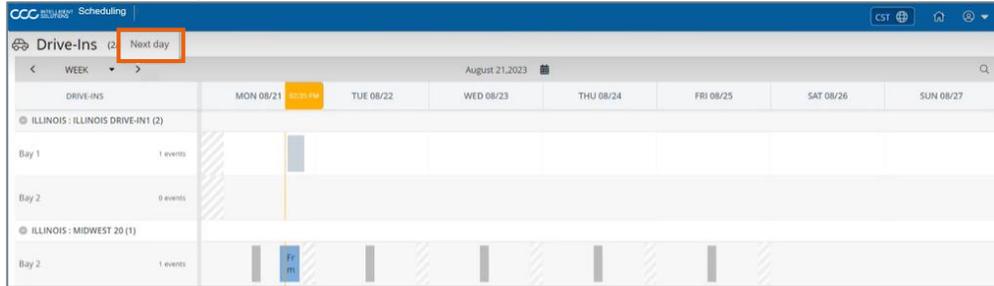


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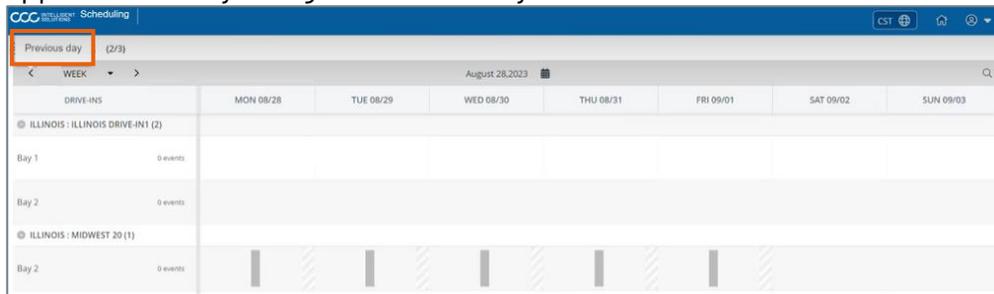
CCC® Schedule Manager 2.1, continued

Appointments and Activities, Continued

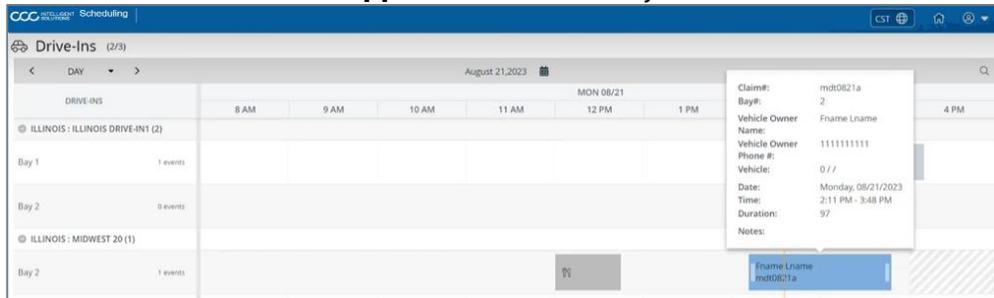
For consistency of tone of instructions, perhaps rephrase this to: The user can view the **Next Day** or upcoming weeks appointment by using the **>** arrow key.



The user can also view the **Previous Day** or previous weeks appointments by using the **<** arrow key.



The user will click on the **appointment** that they want to see.

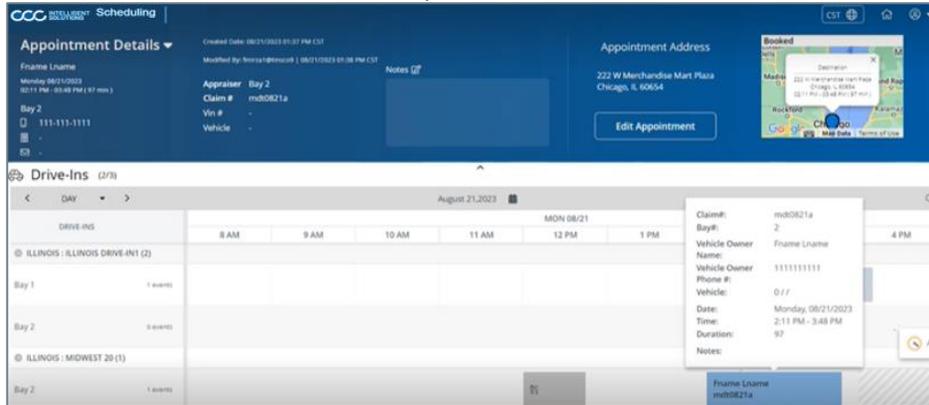


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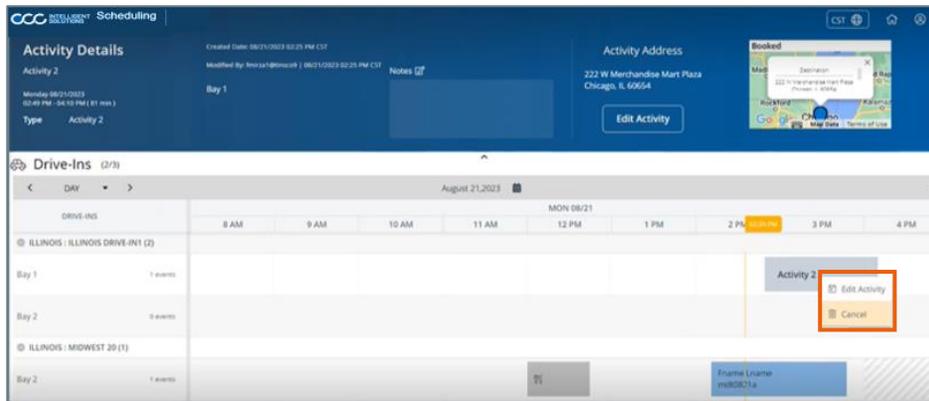
CCC® Schedule Manager 2.1, continued

Appointments and Activities, Continued

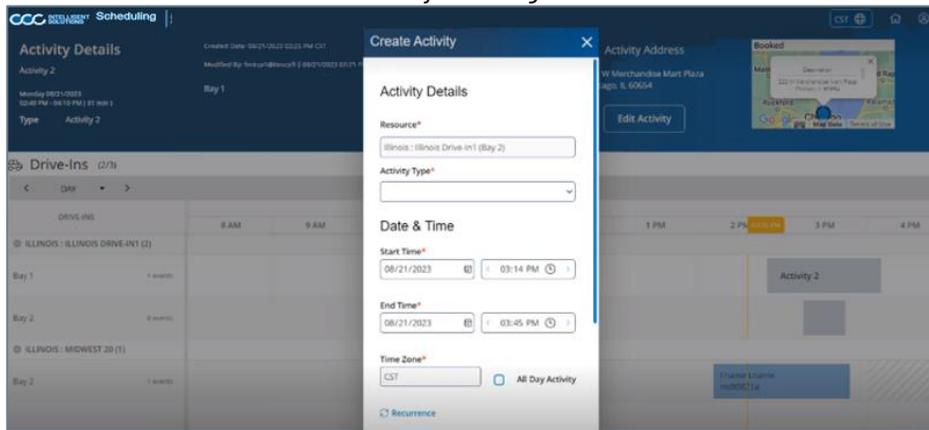
The **appointment details** will open.



The user can **Edit** or **Cancel** the activities.



The user can **add** new activities by clicking on the calendar.

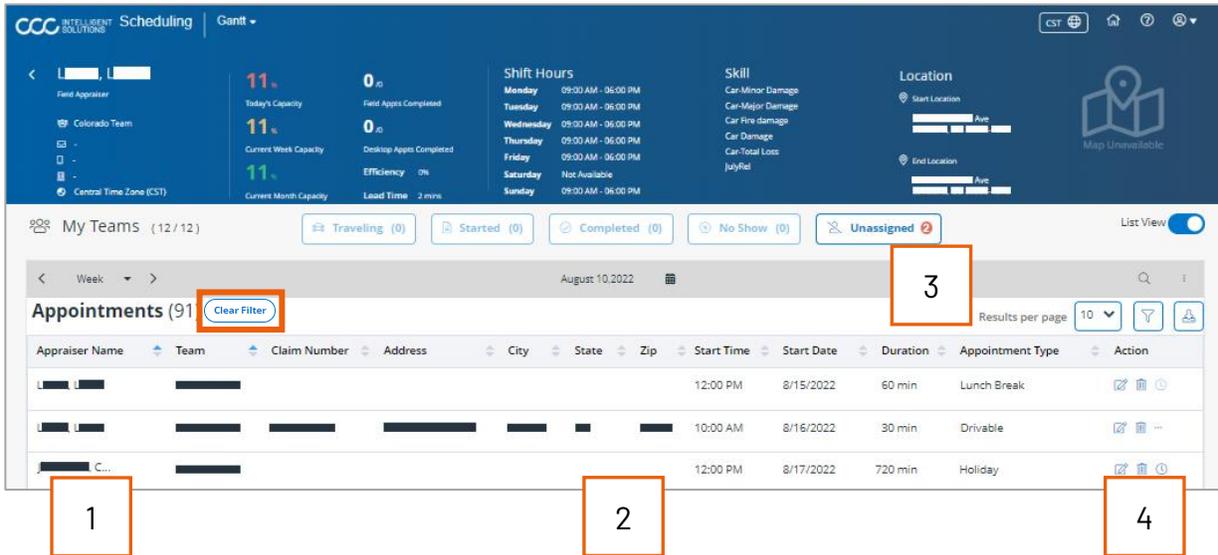


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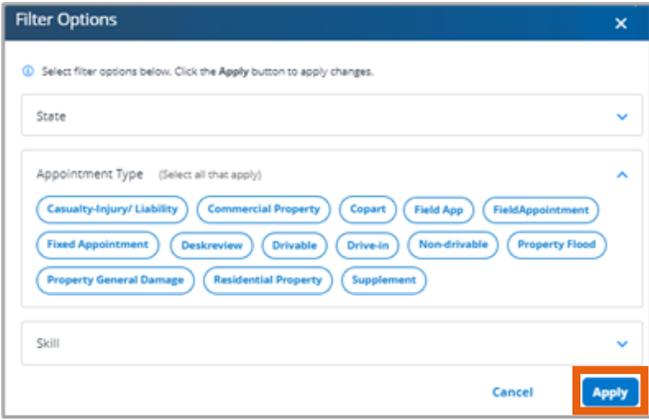
CCC® Schedule Manager 2.1, continued

List View

When the List View is toggled ON a list of the **Appointments** and **Activities** will display with their details above the list.



Step	Action
1	Select the Appraiser Name to display their job details such as their phone number, performance details, and shift hours.
2	Select any of the other Appointment details to display the Assignment and Appointment Detail or Activity Detail .
3	Select the Filter icon to filter by the list of Filter Options, when finished click Apply . Select the Download icon to download an Excel file of the Assignments displayed. Note: Click Clear Filter in the List View to remove any applied filters.
4	The Actions column allows the user to perform the following: Edit Notes, Cancel, Edit Duration, Move to Unassigned, and Lock . Note: If available, click the ellipse icon to view additional Action options.

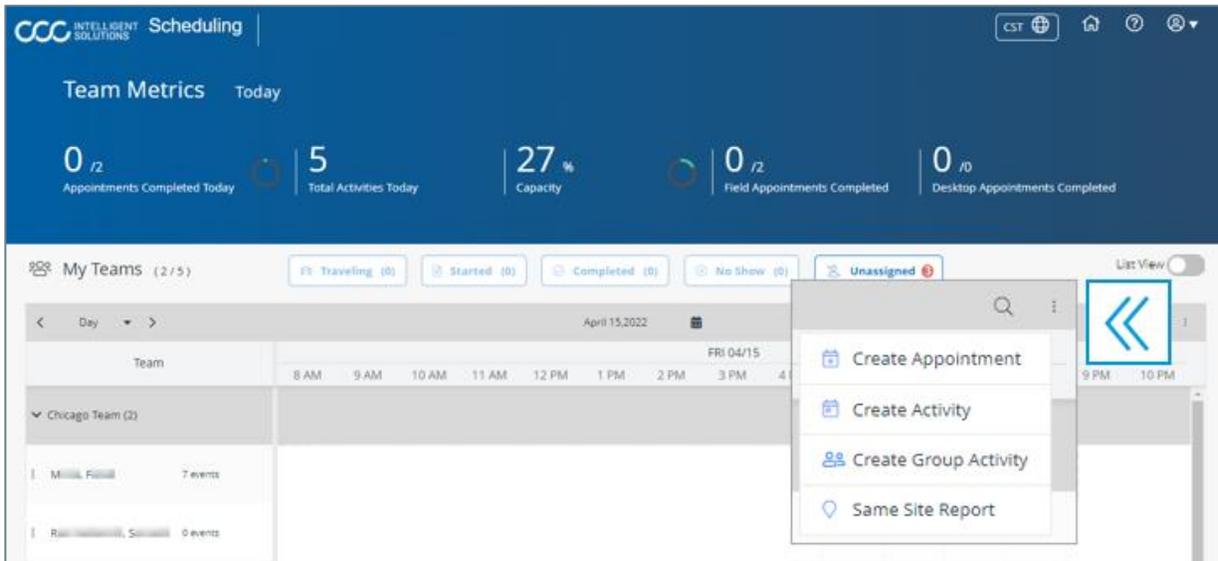


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CCC® Schedule Manager 2.1, continued

Gantt/ Map View Ellipses

The ellipses icon  in the Gantt and Map view have the following options: **Create Appointment**, **Create Activity**, **Create Group Activity**, or **Same Site Report**. See the next page for a breakdown the scheduling options. **Note: Create Appointment** details can be found in the Editing and Cancelling an Appointments job aid.



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CCC® Schedule Manager 2.1, continued

Creating an Activity

Create Activity lets you create new activities directly from the Schedule Manager screen. Enter the Activity information as needed.

Activity Details

Resource *

Activity Type *

Address *

City *

State *

Zip *

+ Add Claim Number

Date & Time

Start Time *

End Time *

Time Zone *

All Day Activity

Recurrence

Notes

Cancel Save

Activity Details

- Select a **Resource** from the Teams selected.
- Select an **Activity Type**, select the checkbox if the activity is a **Desk Activity**. **Note:** If Desk Activity is checked the Address fields are not required.
- Enter the activity's **Address** details as necessary. Travel time for appointments will be calculated based on the address entered.
- Select **Add Claim Number** then enter a Claim Number to associate with the activity.

Date & Time

- Enter the **Start/End Time**, you can indicate if the appointment is **All Day**.
- Select the **Time Zone** for the activity.
- Select **Recurrence** to make the activity repeat based on your configuration.

Enter **Notes** in the field as needed.

Click **Save**.

Note: The fields with an asterisk are required.

Recurrence

- Select how often the activity will occur (Daily, Weekly, Monthly, Yearly).
- Enter a **Start/ End Date** for the activity.
- Enter the activities **Start/ End Time** or select a activity durration.

Click **Save**.

Repeats

Start Date

End Date

Start Time

End Time

Duration

Cancel Save

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CCC® Schedule Manager 2.1, continued

Creating a Group Activity

Create Group Activity lets you create a new activity across all team members in your organization directly from the Schedule Manager screen.

All Teams/My Teams

- Select **All Teams** or **My Teams**.
- Search for a team or individual.
- Select **All Teams** or **My Teams**.
- Click the **plus** icon to add an entire team or individual(s)

Selected

- Individuals will appear in the selected area organized by team.
- Click the **X** icon to remove an individual or entire team.

Activity Details

- Enter the same activity details described in the [Creating an Activity](#) section. **Note:** Address field is required.

Viewing Same Site Reports

Same Site Report allows you to view where appointments are occurring at the same location and day.

Part	Description
1	Enter a date to Search by Date Range , then select Run Report to display results.
2	Select the number of results displayed per page.
3	Download the report as an Excel® file.

Name	Team	Claim Number	Address	City	State	Zip	Appt Start Time	Appt End Time	Appt Type
M [redacted], F [redacted]	Chicago team	[redacted]	[redacted] W Chicago Ave	Chicago	IL	60622	Fri, Apr 15, 2022 8:52AM CST	Fri, Apr 15, 2022 9:22AM CST	Car Major Damage
M [redacted], F [redacted]	Chicago team	[redacted]	[redacted] W Chicago Ave	Chicago	IL	60622	Fri, Apr 15, 2022 11:14AM CST	Fri, Apr 15, 2022 11:59AM CST	Deskreview

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CCC® Schedule Manager 2.1, continued

Viewing Appointment Details

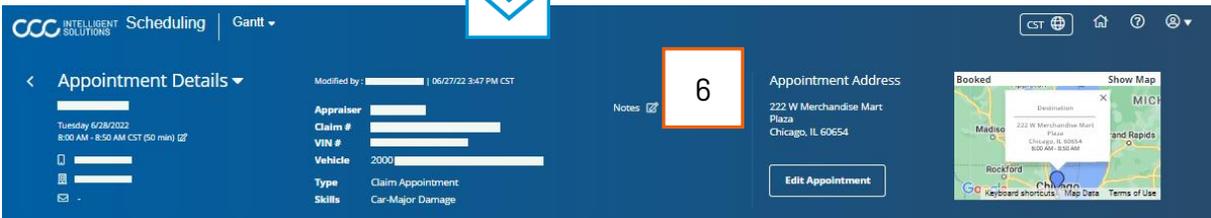
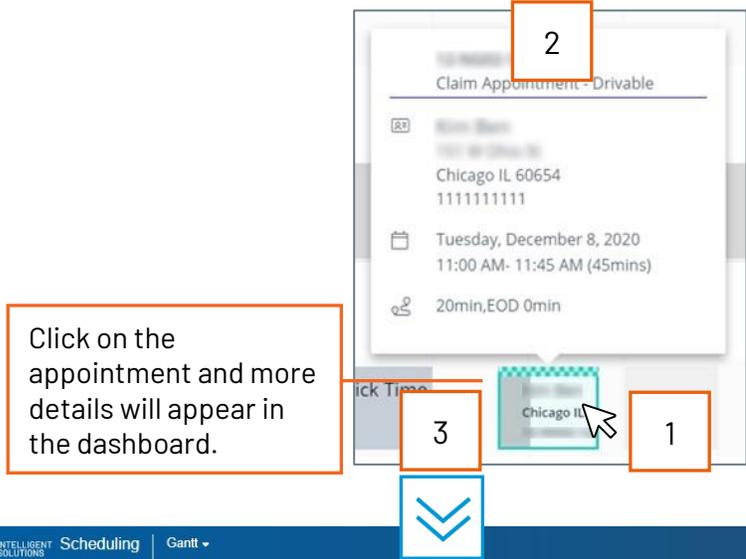
For more detailed information about appointments, **hover your cursor** over a scheduled appointment **(1)** to see a summary of the appointment **(2)**.

For greater details, **click on the appointment (3)** and more details will appear in the dashboard area. Toggle **(4)** between **Appointment Details** and **Assignment Details** views.



Appointment Details: Add notes to the appointment **(5)** or edit the appointment itself **(6)**.

Assignment Details: Select the **Instructions to Estimator**, **Fact of Loss**, or **Prior Damages Notes (7)**.



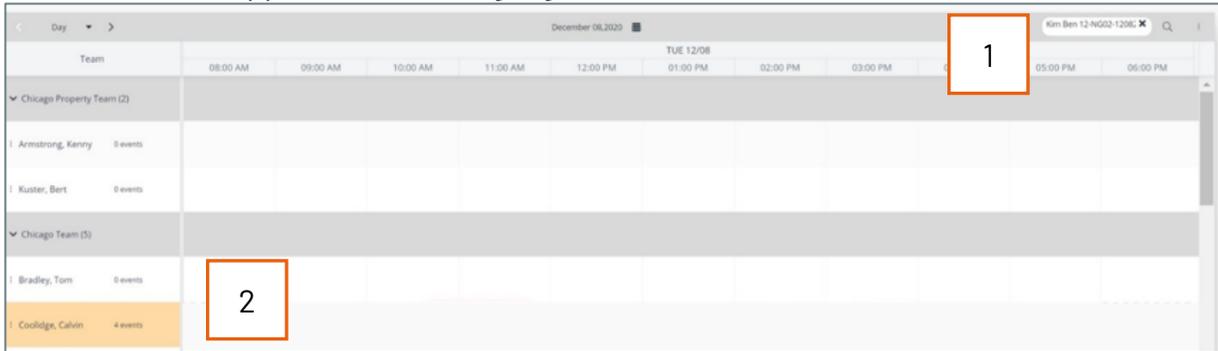
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CCC® Schedule Manager 2.1, continued

Searching for Appointments

In the **Gantt** view, you can search appointments by **claim** or **client name** (1).

When you select a searched appointment, the assigned appraiser and appointment are highlighted (2).

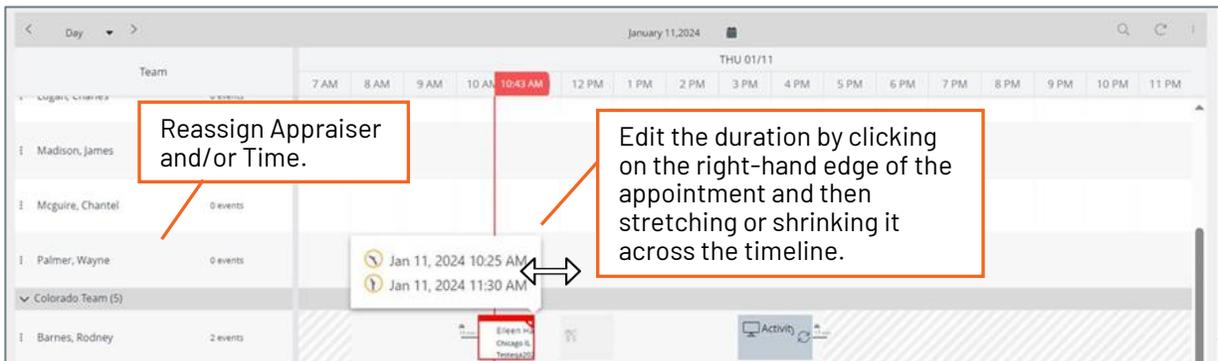


Editing Appointments

In **Gantt** view, you can **edit appointments** directly on the schedule.

You can:

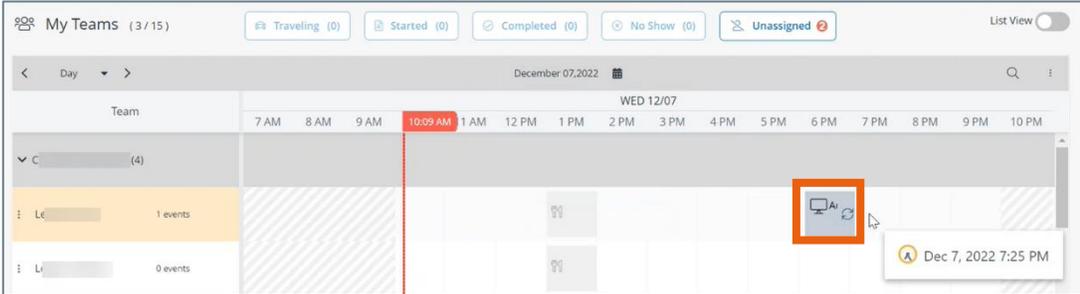
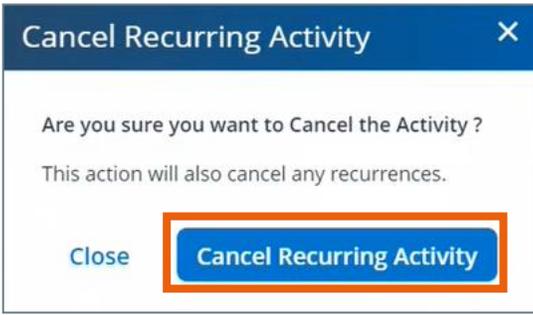
1. Change the **duration** ⇄ of the appointment.
2. Click & drag appointments on the schedule to a **different time**.
3. Click & drag appointments to a **different appraiser** to reassign them.



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CCC® Schedule Manager 2.1, continued

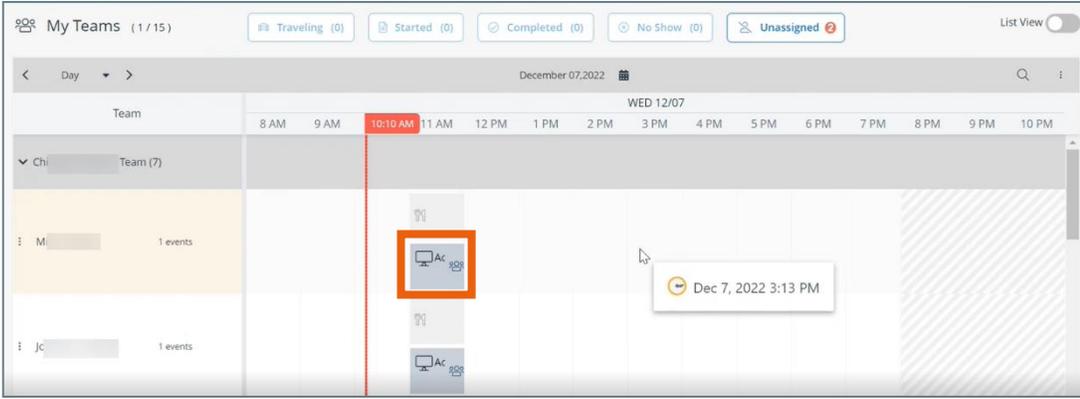
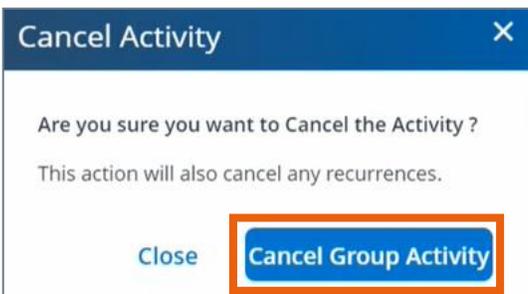
Cancel Recurring and Group Appointments Follow the steps below to cancel a recurring appointment:

Step	Action
1	<p>When a recurring appointment is scheduled, an icon  will appear next to the appointment.</p>  <p>To cancel a recurring appointment, right-click on the appointment. Then, click on the Cancel button.</p> 
2	<p>A Cancel Recurring Activity window will display to confirm your action. Click Cancel Recurring Activity.</p> 

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CCC® Schedule Manager 2.1, continued

Cancel Recurring and Group Appointments, continued

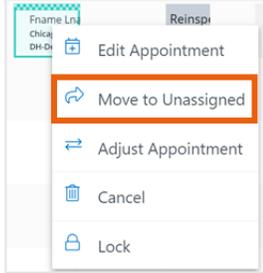
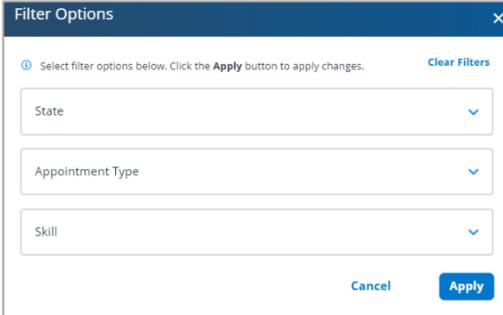
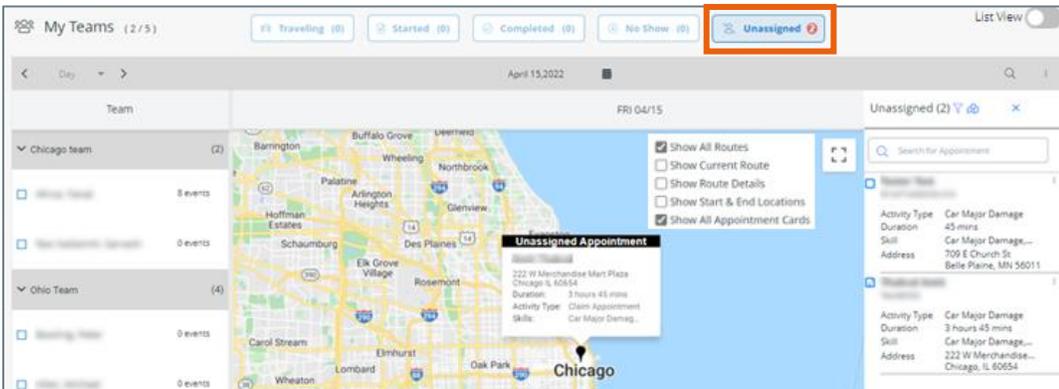
Step	Action
1	<p>When a group appointment is scheduled, an icon  will appear next to the appointment.</p>  <p>To cancel a group appointment, right-click on the appointment. Then, click on the Cancel button.</p> 
2	<p>A Cancel Activity window will display to confirm your action. Click Cancel Group Activity.</p> 

Note: Recurring and Group activities are **not** editable. They can only be created and cancelled.

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CCC® Schedule Manager 2.1, continued

Unassigned Appointments The **Unassigned** filter allows you to view unassigned appointments in the Gantt and Map views.

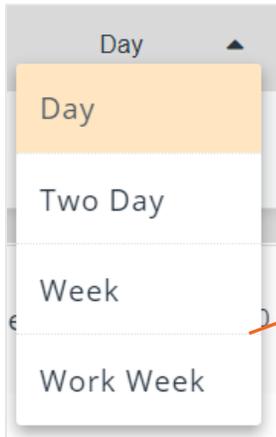
Part	Description	
1	<p>In the Gantt view, you can move an appointment to Unassigned on the schedule by right clicking the appointment and selecting Move to Unassigned.</p> <p>This will move appointments into the Unassigned bin, which you can use to reassign the appointment by dragging the appointment to the desired time and appraiser.</p>	
2	<p>Select the filter icon in the Unassigned bin to open the Filter Options, here you can filter by the categories: State, Appointment Type, and Skill. Click Apply to set the filters. Note: Click Clear Filters to remove all selected filters.</p>	
3	<p>Click the ellipses icon  in the Unassigned appointment to then click Edit Appointment edit the Appointment. Note: Edit appointment details options can be found in the Editing and Cancelling an Appointments job aid.</p>	
4	<p>Select Unassigned in the Map view to view the location of the unassigned appointment on the map.</p> 	

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CCC® Schedule Manager 2.1, continued

Viewing Timeframes

You can choose the **length of the schedule** to view in the Gantt mode from the options in the calendar drop list.



Week displays the schedule for a full seven-day week.

Work Week displays the schedule for the days that you've designated as a business day.

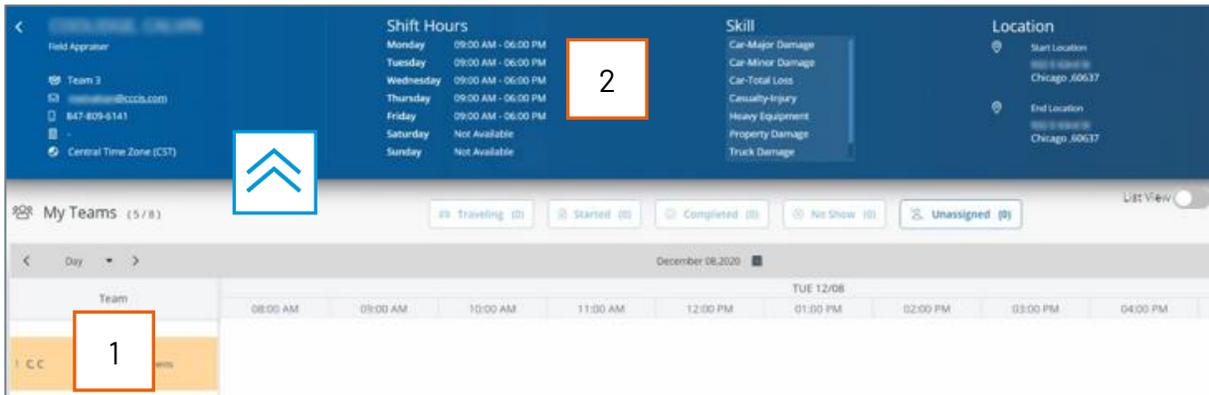
Note: If only Monday through Friday are set up as the workdays, then only those five days will be shown.

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CCC® Schedule Manager 2.1, continued

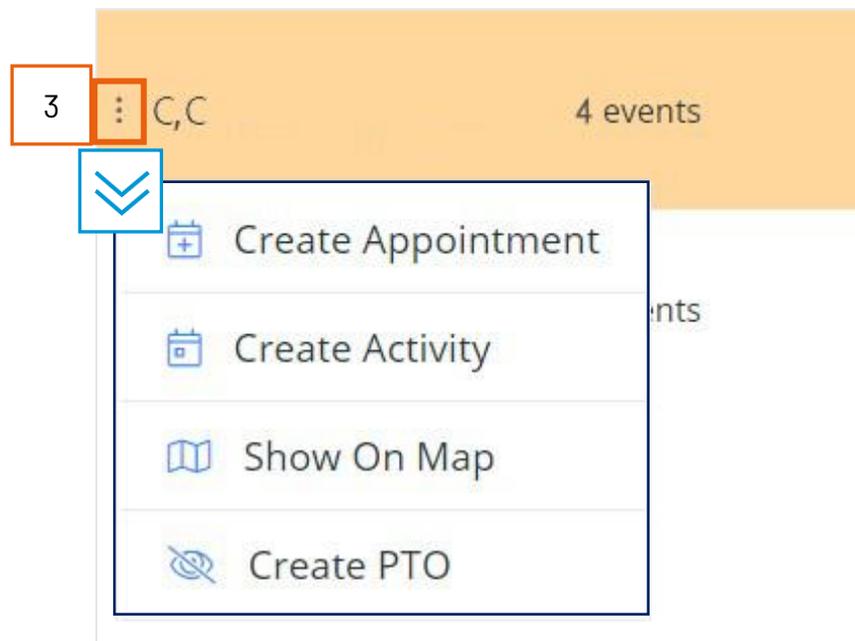
Appraiser Details

You can **click on an appraiser (1)** to see their contact information, skills, availability, and location which will appear above it in the dashboard area **(2)**.



Appraiser Ellipses

Selecting the ellipses icon **(3)** on a specific appraiser in the Gantt view will display a drop list of actions you can perform directly from the Schedule Manager screen:



Note: for the Create Appointment and Create Activity options, the appraiser will be pre-filled as the person responsible for the task.

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CCC® Schedule Manager 2.1, continued

Time Zones

You can re-select **Time Zones** directly from the dashboard without needing to reconfigure this detail in settings.



Help Icon

Help  (2) lets you toggle between the appointments' attributed colors (3) and a view of the appraisers' skills (4).

The screenshot shows the dashboard interface with four callouts:

- 1:** Points to the Time Zone icon (CST with a globe) in the top right navigation bar.
- 2:** Points to the Help icon (a question mark) in the bottom right navigation bar.
- 3:** Points to the Appointment Types section, which lists various appointment types with color-coded squares and durations. Examples include Drivable (45 mins), Non-drivable (90 mins), Copart (45 mins), Supplement (60 mins), Casualty-Injury/ Liability (60 mins), Deskreview (45 mins), Property Flood (480 mins), Property General Damage (240 mins), Drive-in (45 mins), Fixed Appt (30 mins), Commercial Property (45 mins), Residential Property (60 mins), Field App (30 mins), TestField (60 mins), and Test-1 (60 mins).
- 4:** Points to the Skills section, which lists various skills such as CTestskill01 AutoBody Fire, Car Damage, Car Fire damage, Car-Major Damage, Car-Minor Damage, Car-Total Loss, Casualty-Injury, Commercial Property, Flood damage, Heavy Equipment, Language Spanish, Property Damage, Residential Property, Test, TestSkills, Theft, Truck Damage, Video, dgfsfh, and new.

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CCC® Schedule Manager 2.1, continued

Version History

Version Number	Revision Date	Description
1.0	8/2/2021	Version history added for tracking
2.0	3/2/2022	Activity Recurrence, Unassigned Appointments Enhancements, and Creating a Group Activity
3.0	4/15/2022	Reorder Appraisers in the Gantt View.
4.0	6/28/2022	Added Appointment Details and Assignment Details views.
5.0	8/10/2022	Added List View functionality.
6.0	11/18/2022	Updated footer.
7.0	12/13/2022	Added Cancel Recurring and Group Appointments
8.0	9/7/2023	Added Schedule Manager Drive-In
9.0	1/24/2024	Updated for 2.1
