CCC[®] Schedule Manager 2.1

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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. |



Continued on next page



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

| Teams (8/8 teams selected) | | | |
|----------------------------|-------------|----------------------|----|
| | | Teams (8/8 teams sel | ec |
| Team 1 | 6 Members | | |
| Team 2 | 2 Members | E | |
| Team 3 | 5 Members | E | |
| Team 4 | 5 Members | | |
| Team 5 | 3 Members | 8 | |
| Team 6 | 2 Members | | |
| Team 7 | 5 Members | | |
| | * ** | | |

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).

| 2 /8 teams selected) | All Teams My Teams |
|----------------------|--------------------|
| Team 2 2 Members | × |
| Team 3 5 Members | × |
| Team 4 5 Members | × |
| Team 5 3 Members | × |
| Team 6 2 Members | × |

Continued on next page



| 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). |
|----------------------------|--|
| All Teams My Teams | All Teams My Teams |
| Teams (0/8 teams selected) | Teams (0/8 teams selected) |
| Select Teams 1 | Select Teams |
| | Team 1 |
| | Team 2 |
| | Team 3 |
| | Team 4 |

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

| All Teams My Teams | Q Find your team members | 온 6 Members Selected |
|----------------------------|-----------------------------------|----------------------|
| Teams (1/8 teams selected) | Team 1 (6 Team Members Selected) | |
| Team 1 6 Members 2 | ≥ 3 | 🖌 Lennox, Tom |

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.

| All Teams My Teams 4 | | Q. Find your team members | 各 11 Members Selected |
|-----------------------------|-------------|--|-------------------------|
| Teams (2/18 teams selected) | | Colorado Team (5 Team Members Selected) | ✓ Select / Deselect All |
| | • | ✓ Barnes, Rodney ✓ Byrd, Donna ✓ Hamilton, Alexander | Collier, William |
| Colorado Team | 5 Members × | | |
| CA-LEAN TAAS DATA | 6 Members 🗙 | | |
| | | | |
| | | | |
| | | | 5 |
| | | | Let's Gol |

Continued on next page



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.

| Solutions Scheduling | Gantt - | Gantt - Ξ Gantt (CST ⊕) (Ωੇ ⑦ ⊗ ▼ |
|--|---|--|
| Team Metrics Too | day | |
| 1 /6 Appointments Completed Today | O 13 Total Activities Today 0 /4 Field Appointm | nents Completed 1 /2 Desktop Appointments Completed |
| 容 My Teams (4/8) | 3 (☆ Traveling (1) (☆ Started (1) (⊘ Completed (1) | © No Show (1) ≥ Unassigned • 5 |
| < Day • > | December 15,2020 | — Q : |
| Team | 22:00 AN/3:00 AN/3:00 AN/3:00 AN/3:00 AN/3:00 AN/3:00 AN/3:00 | TUE 12/15 Ο ΑΜ/2:00 ΡΙΛΟΊ:00 ΡΙΛ Α |
| i Devents | 2 | |
| : Devents | | |
| : 0 events | | |
| Powered by CCC. © 2019-2020 CCC Informat | tion Services Inc. All Rights Reserved. | |

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.



Continued on next page



Gantt View -Reorder Appraisers

Appraisers in the To reset the er My Teams (2/9) 密 My Teams (2/9) Gantt view can be Appraisers to Day 🔹 > reordered by their default Day 🔹 > Team clicking and alphabetical Team dragging them to order, right click Chicago Property Team (6) the desired order. the **Team** header RESET TEAM SORTING 2 and click **RESET** The same order will show in the Map TEAM SORTING. view. Note: The order for the team you set will **Note:** Resetting the team sort will be only be applied to your account. applied to all Teams selected in the My Appraisers can only be reordered in the Teams view. Gantt view. Appraisers cannot be dragged and dropped into another team.

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

Schedule Manager Drive-In

Scheduling Create an Appointment Schedule Manager 2.1 Schedule Manager Drive-In Scheduling Settings My Appointments Inspection Scheduling Operational Report

Continued on next page





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.

Continued on next page



CCC® Schedule Manager 2.1, continued continued



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

| | Hilling | | | | | | | | csi 🌐 |) ଜ 💿 🗕 |
|----------|------------------------------|------|------|-------|-----------------|-----------|------|-------------------------|-----------|---------|
| 🚓 Dri | ive-Ins (2/3) | | | | | | | | | |
| < | DAY · > | | | A | ugust 21,2023 🛗 | | | | | Q |
| | Data in sur | | | | | MON 08/21 | | | | |
| | DRIVE-INS | 8 AM | 9 AM | 10 AM | 11 AM | 12 PM | 1 PM | 2 PN 02:35 PM | 3 PM | 4 PM |
| O ILLING | OIS : ILLINOIS DRIVE-IN1 (2) | | | | | | | | | |
| Bay 1 | 1 events | | | | | | | A | ctivity 2 | |
| Bay 2 | 0 events | | | | | | | | | |
| © ILLING | OIS : MIDWEST 20 (1) | | | | | | | | | |
| Bay 2 | 1 events | | | | | 99 | | Fname Lname mdt0821a | | |

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

| CCC Internation Scheduling | | | | | | | | cst 🄀 | ଳ 🛛 🕶 |
|-------------------------------|-------|------|-------|------------------|-----------|------|-------------------------|-----------|-------|
| Drive-Ins (2/3) | | | | | | | | | |
| < DAY > | | | | August 21.2023 🛗 | | | | | Q |
| Day | | | | | MON 08/21 | | | | |
| | 8 AM | 9 AM | 10 AM | 11 AM | 12 PM | 1 PM | 2 PN 9735 PM | 3 PM | 4 PM |
| ILLINOIS I Week J IVE-IN1 (2) | | | | | | | | | |
| Bay 1 1 e | erts | | | | | | Ac | ctivity 2 | |
| Bay 2 0 e | vents | | | | | | | | |
| ILLINOIS : MIDWEST 20 (1) | | | | | | | | | |
| Bay 2 1 e | ents | | | | 91 | | Fname Lname mdt0821a | | |



CCC® Schedule Manager 2.1, continued 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.

| CCC BISHEEM Scheduling | | | | | | (| ST 🤀 🙃 🛛 🗢 |
|-----------------------------------|-------------------|-----------|--------------|-----------|-----------|-----------|------------|
| Brive-Ins (2. Next day | | | | | | | |
| < WEEK • > | | | August 21,20 | 23 💼 | | | Q |
| DRIVE-INS | MON 08/21 0235 PM | TUE 08/22 | WED 08/23 | THU 08/24 | FRI 08/25 | SAT 08/26 | SUN 08/27 |
| ILLINOIS : ILLINOIS DRIVE-IN1 (2) | | | | | | | |
| Bay 1 t events | | | | | | | |
| Bay 2 0 events | | | | | | | |
| ILLINOIS : MIDWEST 20 (1) | | | | | | | |
| Bay 2 Levents | Fr | | | | | <i>§</i> | |

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

| CCC BECHEREN Scheduling | | | | | | ĺ | ମେ 🕀 🕼 🗢 🕶 |
|-----------------------------------|-----------|-----------|-------------|-----------|-----------|-----------|------------|
| Previous day (2/3) | | | | | | | |
| < WEEK • > | | | August 28,2 | 023 🗰 | | | Q |
| DRIVE-INS | MON 08/28 | TUE 08/29 | WED 08/30 | THU 08/31 | FRI 09/01 | SAT 09/02 | SUN 09/03 |
| ILLINOIS : ILLINOIS DRIVE-IN1 (2) | | | | | | | |
| Bay 1 0 events | | | | | | | |
| Bay 2 0 events | | | | | | | |
| ILLINOIS : MIDWEST 20 (1) | | | | | | | |
| Bay 2 0 events | | | | | | | |

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

| Brive-Ins (2/3) | | | | | | | | | | |
|---|------|------|-------|----------------|-----------|------|---|---|------|---|
| < DAY • > | | | | August 21,2023 | | | 1 | | | Q |
| DBD# INF | | | | | MON 08/21 | | Claim#: | mdt0821a | | |
| DRIVEINS | 8 AM | 9 AM | 10 AM | 11 AM | 12 PM | 1 PM | Vehicle Owner | 2 Ename Loame | 4 PM | |
| ILLINOIS : ILLINOIS DRIVE-IN1 (2) Bay 1 1 eve Bay 2 0 eve ILLINOIS : MIDWEST 20 (1) | 45 | | | | | | Name: Vehicle Owner Phone #: Vehicle: Date: Time: Duration: Notes: | 111111111 0// Monday, 09/21/2023 2:11 PM - 3:48 PM 97 | | |
| Bay 2 1 eve | 0 | | | | 71 | | Fname Lnam mdt0821a | • | | |

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CCC® Schedule Manager 2.1, continued continued



The user can Edit or Cancel the activities.

| CCC BEENERT Scheduling | | | | <u>G</u> ⊕ ⊕ • |
|--|---|------------------|--|---|
| Activity Details Activity 2 Montey 80(2) (2003) 10-01 PM - Set 10 PM (11 mm) Type Activity 2 | Count date 80/10/00/3129.144 (37 Maather by Interpretation) 80/51/35/25221 INI (37 Notes (27 Ray 1 | | Activity Address 222 W Merchandise Mart Plaza Chicago, IL 60654 Edit Activity | Booked Mar Surveyers and the |
| 🖶 Drive-Ins 🕬 | | ^ | | |
| < DAY · > | | August 21,2023 📓 | | ٩ |
| DRIVE-INS | 8 AM 9 AM | 10 AM 11 AM | MON 08/21 12 PM 1 PM | 2 PM |
| ILLINOIS : ILLINOIS DRIVE-IN1 (2) | | | | |
| Bay 1 teams | | | | Activity 2 |
| Bay 2 0 events | | | | Cancel |
| © ILLINOIS : MIDWEST 20 (1) | | | | |
| Bay 2 + even | | | 8 | Iname Liname milliol21a |

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

| Activity Details | | Create Activity × | Activity Address | Broked | | |
|--|---------|---------------------------------------|--|--|--|--|
| Accentry 2 Memory 86/31/0003 Color PM - decisio PM (81 Akm 3 Type Activity 2 | | Activity Details | W Morchandise Mart Plaza Lagis II. 60654 Edit Activity | Band State S | | |
| B Drive-Ins an | _ | Illinois : Illinois Drive-In1 (Bay 2) | | | | |
| < D0 • > | | ~ | | | | |
| DENC INS | EAM 9AM | Date & Time | t PM | 2 Ph <mark>attana</mark> 3 PM 4 PM | | |
| @ ILLINOIS : ILLINOIS DRIVE-IN1 (2) | | Start Time* | | | | |
| Bay 1 tears | | 08/21/2023 00 03:14 PM (S) | | Activity 2 | | |
| Bay 2 Control | | End Time* 08/21/2023 | | | | |
| © RLENOIS : MIDWEST 20(1) | | Time Zone* | | | | |
| Bay 2 Taiwin | | All Day Activity | | | | |
| | _ | C Recurrence | | | | |

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List View

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

| | Scheduling Gantt + | | | ſ | <u>ल क</u>] @ @ ♥ |
|--|---|--|--|--|--------------------|
| CCC BUCHNER Rel Apparature Control In Control In Con | Scheduling Cannet 11. 0.0 Taskyn Capacity Faid Appen Camplesd 11. 0.0 Corrers West Capacity Faid Appen Camplesd 11. 0.0 Corrers West Capacity End Time 2 novs standard Corrers West Capacity 11. 0.0 Corrers West Capacity End Time 2 novs MS (12/12) Image Traveling (0) Image 2 novs Started (0) Image 2 novs Clear Filter a Team< Clear Filter | DUCS 0900 MA - 0600 PM 0900 MA - 0600 PM 0900 MA - 0600 PM 0900 MA - 0600 PM Not Available 0900 MA - 0600 PM Not Available 0900 AM - 0 | Skill Car-Minor Damage Car Nois Chamage Car Nois Chamage Car Nois Chamage Car Nois Showr (0) 2 U Start Time Start Date 12:00 PM 8/15/2022 10:00 AM 8/16/2022 | Location Sort Lozzion Cod Loz | Action |
| 1 | | 2 | 12:00 PM 8/17/2022 | 720 min Holiday | 4 |
| Step | | Acti | on | | |
| 1 | Select the Appraiser Name to number, performace details, a | display th nd shift h | eir job details ours. | s such as their | phone |
| 2 | Select any of the other Appoin Apointment Detail or Activity | tment de Detail . | tails to displa | y the Assignn | nent and |
| 3 | Select the Filter icon to filter by the list of Filter Options, when finished click Apply . | Filter Options Select filter option State | ns below. Click the Apply button to a | sply changes. | × |
| | Select the Download icon to download an Excel file of the Assignments displayed. | Appointment Ty Casualty-Injury Fixed Appointm | pé (Select all that apply) / Liability Commercial Proper tent Deskreview Drivab al Damage Residential Prope | ty Copart Field App (e Drive-in Non-drivable ty Supplement | FieldAppointment |
| | Note: Click Clear Filter in the List View to remove any applied filters. | Skill | | | Cancel Apply |
| 4 | The Actions column allows the Edit Notes , Cancel , Edit Durat | e user to p ion, Move | reform the fo to Unassigne | llowing: ed, and Lock. | |

Note: If available, click the ellipse icon to view additional Action options.



Gantt/ Map The ellipses icon 🚦 in the Gantt and Map view have the following **View Ellipses** 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.

| Solutions Scheduling | | ডে⊕ ৫ ৫ ⊗∙ |
|--------------------------------------|--|--|
| Team Metrics Today | y . | |
| 0 /2 Appointments Completed Today | 5 Total Activities Today 27 % Capacity 0 /2 Reid Appoint | ments Completed Desktop Appointments Completed |
| 容 My Teams (275) | Ft Traveling (0) | C Unassigned () |
| < Day ♥ > Team | April 15,2022 | Create Appointment |
| ← Chicago Team (2) | | Create Activity |
| I Million Filmed Texemon | | Se Create Group Activity |
| F Rector Science O events | | Same Site Report |



Creating an Activity

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

| New Activity | | × |
|--------------------|-----------------------|------|
| Activity Details | | |
| Resource * | | |
| | | ~ |
| Activity Type * | | |
| | ✓ □ Desk Activity (1) | |
| Address * 🕦 | | |
| | | |
| City * | State* Zip | • |
| | | |
| + Add Claim Number | | |
| Date & Time | | |
| Start Time * | | |
| 04/13/2022 | C 07:00 AM | 0 > |
| End Time * | | |
| 04/13/2022 | C 07:00 AM | © > |
| Time Zone * | | |
| CST | ✓ □ All Day Activity | |
| | | |
| Notes | | |
| | | |
| | | , |
| | | /II |
| | Cancel | Save |

| Recurrence | | × |
|------------|---|-------------|
| Repeats | Daily Daily Weekly Monthly Yearly | ~ |
| Start Date | 04/15/2022 | |
| End Date | 04/15/2022 | |
| Start Time | 08:00 AM | 0 |
| End Time | 08:00 AM | 0 |
| Duration | | ~ |
| | | 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.



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

| New Group Activity | | × | All Teams/My Teams |
|--|---|---|---|
| New Group Activity Resources * (a) Use the Teams selection on the left to ad activity. All Teams • (b) Chicago team (2) + (c) Chicago tea | d the Team or Team members included in the Selected California Team (4) X | Activity Details Activity Type* | 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. |
| | | © Recurrence Notes | Activity Details Enter the same activity details described in the Creating an Activity section. Note: Address field is required |

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

| Part | | | | | De | scrip | tion | | |
|------------------|--------------|--------------|--------------------|---------|---------|--------|-------------------------------|-------------------------------|------------------|
| 1 | Enter a | date to S | Search by [|)ate F | Rang | e, the | n select Run R | eport to displa | ау |
| | results | | | | | | | | |
| 2 | Select | the numb | per of resul | ts dis | play | ed pe | r page. | | |
| 3 | Downlo | ad the re | eport as an | Exce | l® file | e. | | | |
| < Same Site | e Report | | | ſ | 1 | | | 2 | 2 3 |
| Date Range | 04/14/2022 | _ 04/16/ | 2022 🗖 🛛 Run R | teport | 1 | | | Results per page | 5 - 2 |
| Name | Team | Claim Number | Address | City | State | Zip | Appt Start Time | Appt End Time | Appt Type |
| Million, Filling | Chicago team | | W Chicago Ave | Chicago | IL | 60622 | Fri, Apr 15, 2022 8:52AM CST | Fri, Apr 15, 2022 9:22AM CST | Car Major Damage |
| Millio, Filling | Chicago team | | W Chicago Ave | Chicago | IL | 60622 | Fri, Apr 15, 2022 11:14AM CST | Fri, Apr 15, 2022 11:59AM CST | Deskreview |

< < 1 - 2 of 2 👂 🍑

Continued on next page



| Viewing Appointment Details | For more detailed information about a over a scheduled appointment 🔀 (1) t appointment (2). | ppointments, hover your cursor to see a summary of the |
|-----------------------------------|---|--|
| | For greater details, click on the | Appointment Details |

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).



Continued on next page



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

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

| < Day • > | | | | | December 08,2020 | | | | | Kim Ben 12-NG02-12086 🗙 | Q, I |
|---|----------|----------|----------|----------|------------------|-----------------------|----------|----------|---|-------------------------|------|
| Team | 08:00 AM | 09:00 AM | 10:00 AM | 11:00 AM | 12:00 PM | TUE 12/08 01:00 PM | 02:00 PM | 03:00 PM | 1 | 05:00 PM 06:00 P | M |
| Chicago Property Team (2) | | | | | | | | | | | Î |
| 1 Armstrong, Kenny 0 events | | | | | | | | | | | |
| ! Kuster, Bert 0 events | | | | | | | | | | | |
| ← Chicago Team (5) | | | | | | | | | | | |
| I Bradley, Tom Devents | 2 | | | | | | | | | | |
| 1 Coolidge, Calvin 4 events | | | | | | | | | | | |

| Editing | In Gantt view, you can edit appointments directly on the schedule. |
|--------------|--|
| Appointments | You can: |

- 1. Change the **duration** \iff 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.

| < Day -> | | | | | | | January | 11,2024 | | | | | | | | Q | C | |
|-------------------|--------------------------|----------------|------|-----------|-----------------------------|-------|--|---------|----------|-----------|------|------|------|------|------|--------|------|---|
| | Team | | | | | | | | THU 01/1 | 1 | | | | | | 10.014 | | |
| cugar, chanes | w Kolona | 7 AM | 8 AM | a ww | 10 AM 104 | 12 PN | 1 I PM | 2 PM | 3 PM | 4 PM | 5 PM | 6 PM | 7 PM | 8 PM | 9 PM | 10 PM | TIPM | |
| Madison, James | Reassign A and/or Tim | opprais ne. | ser | | | | Edit the duration by clicking on the right-hand edge of the | | | | | | | | | | | |
| Mcguire, Chantel | 0 events | | | | | / | appointment and then stretching or shrinking it across the timeline. | | | | | | | | | | | |
| Palmer, Wayne | 0 events | | S Ja | n 11, 202 | 4 10:25 AN | | | | | - 1 | | | | | | | | |
| Colorado Team (5) | | | U Ja | n 11, 202 | 4 11:30 AN | | | | | | | | | | | | | 1 |
| i Barnes, Rodney | 2 events | | | | Elipert Okcago Testea | 1 | | | A | ctivit) C | - | | | | | | | |



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



Continued on next page



Cancel Recurring and Group Appointments, continued



Continued on next page



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

| Part | Description | | | | | | | | |
|------|---|---|--|---|--|--|--|--|--|
| 1 | In the Gantt view, you can move a Unassigned on the schedule by r appointment and selecting Move This will move appointments into the Unassigned bin, which | an appoi right clic e to Unas | n appointment to ght clicking the to Unassigned . | | | | | | |
| | you can use to reassign the appointment by dragging the appointment to the desired time and appraiser. | Lname Fname DH-Dec-08-02 Activity Type Duration Skill | I Claim Appointment 45 min Car-Major Damage | Cancel | | | | | |
| 2 | 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. Clear Filters Click Clear Filters Clear Filters Clear Filters Clear Filters Clear Filters Click Clear Filters Click Cl | | | | | | | | |
| 3 | 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. | | | | | | | | |
| 4 | Select Unassinged in the Map vie appintment on the map. | ew to vie | (f) (in No Show (f)) (in Unassigned | the unassined | | | | | |
| | Chicago team Cohicago | oorthorcoo Corrent Oak Park Corre | PROGRTS Show All Routes Show Youre Route Show Youre Details Show Youre Details Show Start & End Location Show Start & End Location Show Start & End Location Tel 4 Appointment Tan and a family Res Dana Aspensivel Car May Demas. Chicago | Construction of the second secon | | | | | |

Continued on next page







Continued on next page



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

| Keld Appraver Team 3 Some Biccols.com B47-409-5141 B Central Time Zone (CST) | | Shift HOU Manday Tuusday Wedhesday Thunsday Friday Saturday Sunday | JFS 09:00 AM - 06:00 PM 09:00 AM - 06:00 PM 09:00 AM - 06:00 PM 09:00 AM - 06:00 PM 09:00 AM - 06:00 PM Not Available Not Available | 2 | Skill Car-Major Dumage Car-Neiror Dumage Car-Total Lons Caruality-Injury Heavy Equipment Property Damage Truck Demage | Lor 9 | Cation Start Location Chicago ,40637 End Location Chicago ,40637 | |
|---|---------|---|--|-------------|--|-----------------------|--|-------------|
| 密 My Teams (5/8) | | | traveling (0) | Startel (0) | Completed (t) 🛞 No Show | im 🛛 😤 Unassigned (0) |) | List View 💽 |
| < Day • > | | | | | December 08,2020 | | | |
| Team | OEOC AM | OBOD AM | 10:00 AM | 11:00 AM | TUE 12/08 12:00 PM 01:00 PM | 02-00 PM | 03:00 PM | 04:00 PM |
| 1 cc 1 m | | | | | | | | |

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

| : C,C | | l events |
|-------|-------------------|----------|
| | Create Appointmen | t |
| ē | Create Activity | ints |
| | Show On Map | |
| R | Create PTO | |

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



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

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



Continued on next page



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 |

