

Company Profile Management

Overview

Introduction This guide describes how to configure the company profile information to manage Company, Claim Office, and Location Profiles from the CCC Portal. These profiles are then utilized by Staff Appraisers within CCC® Estimating to create estimates.

Note: Company Profile Management only works with Staff Estimating version 1.9.3 (or higher). Older versions of Staff Estimating will not call this new data, it will continue to use data from Centralized Rates and Taxes. Users may need appropriate permissions to perform edits to the company profile.

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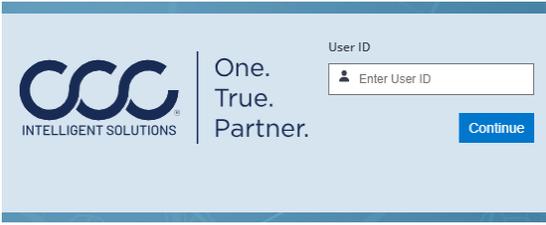
Portal Configuration

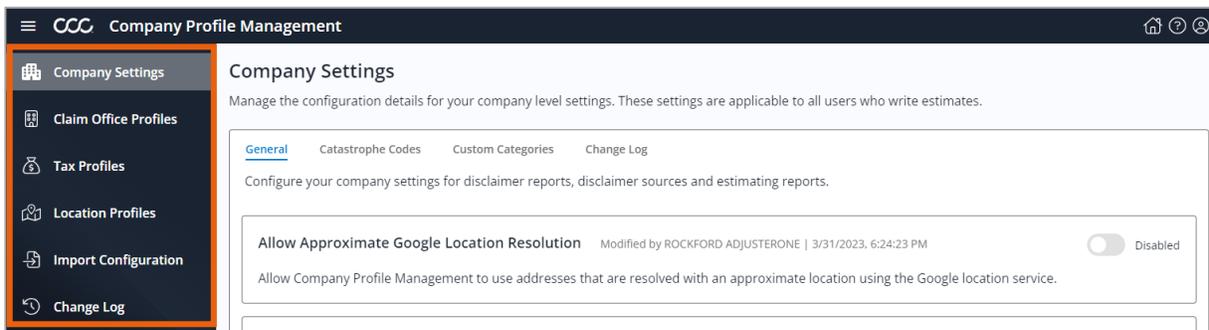
Introduction

This section provides a description of how to access the configuration settings for labor rate information. This information is used in CCC® Estimating for Insurance by appraisers. Labor rate information can be defined for vehicles and motorcycles with further refinement by state, county, and zip code.

Access Configuration Settings

Follow the steps in the table below to access the **Company Profile Management** page:

Step	Action
1	Open your internet browser and visit mycccportal.com .
2	Login to CCC Portal with your User ID and Password . 
3	Select the Company Profile Management link on the left side panel under the Application Configuration heading. 
4	The Company Profile Management page opens, giving you the ability to select from the following options on the left-side panel: Company Settings, Claim Office Profiles, Tax Profiles, Location Profiles, Import Configuration, and Change Log.

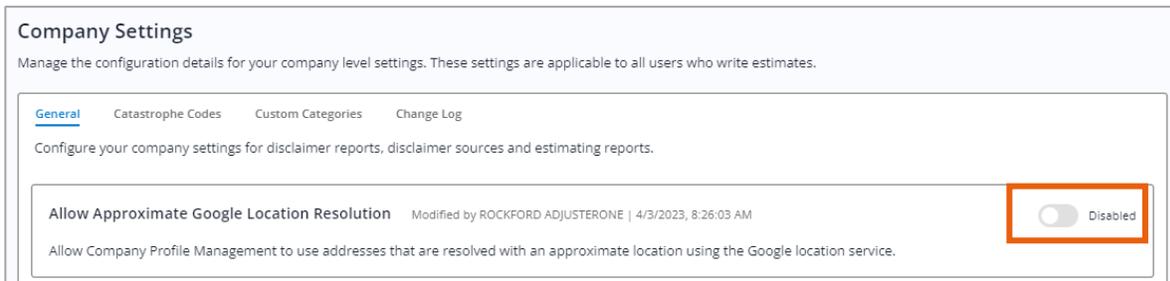


Company Settings

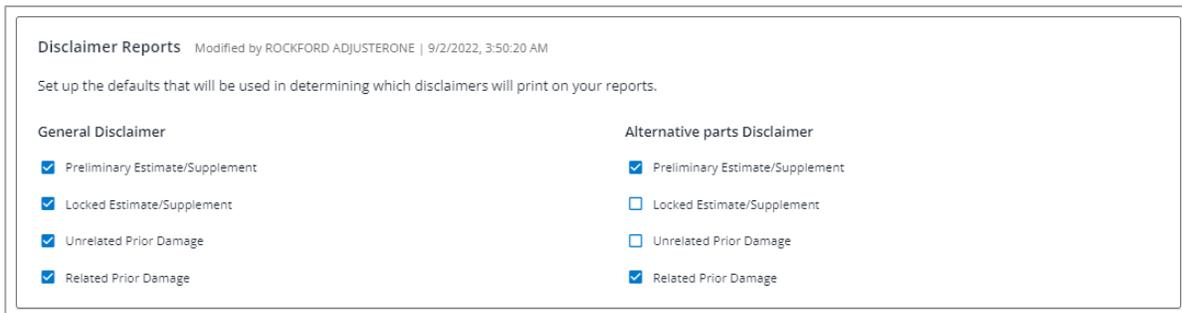
Introduction This section describes how to configure your company settings. Here you can configure **General, Catastrophe Codes, Custom Charge Categories, and Change Log**. To do this, select the **Company Settings** link.

General Configurations General configurations contain three sections **Allow Approximate Google Location Resolution, Disclaimer Reports** and **State Disclaimer Sources**.

In the **Allow Approximate Google Location Resolution** section use the toggle to **Enable** or **Disable** the Google® location services.



In the **Disclaimer Reports** section, use the check boxes under **General** and **Alternative Parts Disclaimer** to select which disclaimers will appear by default on your reports.



Continued on next page

Company Settings, Continued

Configurations, continued

In the **State Disclaimer Sources** section select a Primary and Secondary source state that will be used when displaying the General Disclaimers. To change the priority, click either **Vehicle Owner State**, **Repair Facility State**, or **Insurance Company State** then select the desired priority from the droplist.

State Disclaimer Sources Modified by ROCKFORD ADJUSTERONE | 4/3/2023, 8:40:31 AM

State disclaimers are sourced based on the configuration below. Click on the state disclaimer source to change priority.

Primary Source
 Secondary Source
 Not Assigned

Repair Facility State
 Vehicle Owner State
 Insurance Company State

Catastrophe Codes The **Catastrophe Codes** tab displays all the existing catastrophe codes that have already been setup for the user's company.

Part	Description
Count	The count of Catastrophe Codes is displayed in () next to the header.
Export	The Export icon allows you to download an Excel file of the Catastrophe Codes.
Code	This is the two-digit code for the existing catastrophe code.
Description	This is the description for the existing catastrophe code.
Modified By	This is the name of the user that created/modified the catastrophe code. If you hover over this name, a tool tip displays with the user's login ID and email address.
Modified Date	This is the date and time the catastrophe code was created/modified.
Action	The action column contains the Delete icon to remove Catastrophe Codes, once clicked a confirmation popup appears, click Yes to confirm the deletion.

Company Settings

Manage the configuration details for your company level settings. These settings are applicable to all users who write estimates.

General **Catastrophe Codes** Custom Categories Change Log

Add, edit and delete catastrophe codes. Each catastrophe code must be unique. A catastrophe code description is also required. Click on the catastrophe code to manage details.

Catastrophe Codes (3)

<input type="checkbox"/>	Code	Description	Modified By	Modified Date	Action
<input type="checkbox"/>	DS	Testing	ROCKFORD ADJUSTERONE	2/19/2023, 1:04:32 AM	<input type="button" value="Delete"/>
<input type="checkbox"/>	XC	Testing	ROCKFORD ADJUSTERONE	9/2/2022, 2:08:12 AM	<input type="button" value="Delete"/>
<input type="checkbox"/>	AB	Testing Prod 0902 deployment	ROCKFORD ADJUSTERONE	9/2/2022, 2:07:52 AM	<input type="button" value="Delete"/>

Continued on next page

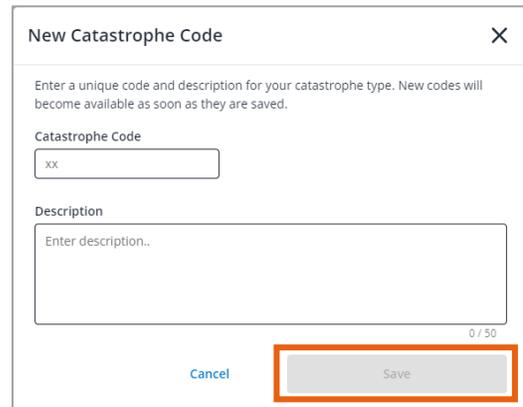
Company Settings, Continued

Catastrophe Codes

New Catastrophe Code:

Follow the steps below to create a new catastrophe code:

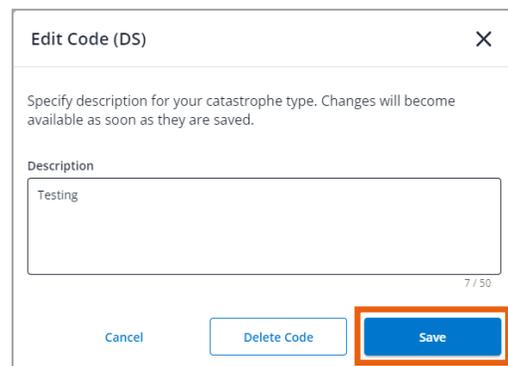
Step	Action
1	Select New Code , the New Catastrophe Code popup opens.
2	Enter a two-digit code in the Catastrophe Code field. This code must be unique for the insurance company. Note: You can only use letters or numbers; no special characters or spaces are allowed.
3	Enter a required Description for the Catastrophe Code.
4	Click Save to add the new Catastrophe Code.



Edit Catastrophe Code:

Follow the steps below to edit a catastrophe code:

Step	Action
1	Select a Catastrophe Code from the list of codes to edit, the Edit Code popup opens.
2	Edit the Catastrophe Code description in the field. Note: You can only edit the Description or Delete Code from this view.
3	Click Save once your changes are made.



Delete Multiple Catastrophe Codes:

Use the checkboxes to select multiple Catastrophe Codes, click the **Delete Selected** Popup. Click **Yes** to confirm the deletion.



Continued on next page

Company Settings, Continued

Catastrophe Codes

Custom Categories are used within CCC ONE Estimating to allow a carrier to create a custom category. These categories could be for labor rates or other charges.

The **Custom Categories** tab allows the user to view all the existing custom charge categories that have already been setup for the user's company.

Part	Description
Count	The count of Custom Charge Categories is displayed in () next to the header.
Export	The Export icon will allow you to download an Excel file of the Custom Charge Categories.
Description	This is the description for the Custom Charge Categories.
Code	This is the code for the Custom Charge Category.
Category Type	This displays if the category is Labor or Miscellaneous .
Modified By	This is the name of the user that created/modified the Custom Charge Category. If you hover over this name, a tool tip will be displayed with the user's login ID and email address.
Modified Date	This is the date and time the Custom Charge Category was created/modified.
Action	The action column contains the Delete icon to remove the Custom Charge Category, once click a confirmation popup appears click Yes to confirm the deletion.

Company Profile Management

Company Settings

Manage the configuration details for your company level settings. These settings are applicable to all users who write estimates.

General Catastrophe Codes **Custom Categories** Change Log

Custom charge categories can be added for labor and miscellaneous category types. A maximum of four custom categories is supported for each category type.

Custom Charge Categories (2)

Description	Code	Category Type	Modified By	Modified Date	Action
Labor 1	C1	LABOR	ROCKFORD ADJUSTERONE	4/3/2023, 11:03:27 AM	
MISC 1	MISC1	MISCELLANEOUS	ROCKFORD ADJUSTERONE	4/3/2023, 11:03:38 AM	

[New Category](#)

Continued on next page

Company Settings, Continued

Catastrophe Codes, continued

Create Custom Categories:

Follow the steps below to create a new Create Custom Category:

Step	Action
1	Select New Category ; the New Category popup opens.
2	Select a Category type from the dropdown, then enter a required Description in the field.
3	Select Save to add the new Category.

New Category

Select a category type and specify a description for new custom category.

Category type (Required)

LABOR

Description (Required)

Testing

7 / 32

Cancel Save

Edit Custom Categories:

Follow the steps below to edit a Custom Categories:

Step	Action
1	Select a Custom Category Code from the list of codes to edit; the Edit Code popup opens.
2	Edit the Custom Categories Code description in the field. Note: You can only edit the description or delete a code from this view.
3	Click Save once your changes are made.

Edit Code (C1)

Specify description for your category type. Changes will become available as soon as they are saved.

Description (Required)

Labor 1

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Cancel Delete Save

Continued on next page

Company Settings, Continued

Change Log The Change Log provides the list modifications made to the company settings.

Part	Description
Count	The count of Custom Charge Categories is displayed in () next to the header.
Filter	Select the filter icon to display the Filter Options, the following options display: <ul style="list-style-type: none"> • Select a Section Type to filter by that section. • Enter a Name or Email to filter by the user who made the modification. • Enter or select a Date Range the modification was made. Click Apply Filters to display the changes in the Change Log area. Note: Click Clear All Filters to remove all the filters selected.
Export	The Export icon will allow you to download an Excel file of the Change Log.
Search	Use the Search field to find change log information.
Description	This is the description for the activity reported in the Change Log .
Section	This is the section that had a change logged for the Custom Charge Category.
Modified By	This is the name of the user that created/modified the item in the description. If you hover over this name, a tool tip will be displayed with the user's login ID and email address.
Modified Date	This is the date and time the item in the description was created/modified.

Company Settings
Manage the configuration details for your company level settings. These settings are applicable to all users who write estimates.

General Catastrophe Codes Custom Categories [Change Log](#)

This page contains a log of changes that have been implemented to the company settings. The most recent changes can be found at the top.

History (17)

Description	Section	Modified By	Modified Date
MISC1 has been added.	Custom Categories	ROCKFORD ADJUSTERONE	04/03/2023, 11:03:38 AM CST
CI has been added.	Custom Categories	ROCKFORD ADJUSTERONE	04/03/2023, 11:03:27 AM CST
CI has been deleted.	Custom Categories	ROCKFORD ADJUSTERONE	04/03/2023, 11:03:11 AM CST
CI has been added.	Custom Categories	ROCKFORD ADJUSTERONE	04/03/2023, 11:02:07 AM CST
Repair Facility State has been updated as the Primary Source.	General	ROCKFORD ADJUSTERONE	04/03/2023, 08:40:31 AM CST
Insurance Company State has been updated as the Primary Source.	General	ROCKFORD ADJUSTERONE	04/03/2023, 08:40:26 AM CST
Vehicle Owner State has been updated as the Secondary Source.	General	ROCKFORD ADJUSTERONE	04/03/2023, 08:40:22 AM CST
Repair Facility State has been updated as the Primary Source.	General	ROCKFORD ADJUSTERONE	04/03/2023, 08:40:22 AM CST
Repair Facility State has been updated as the Secondary Source.	General	ROCKFORD ADJUSTERONE	04/03/2023, 08:40:20 AM CST
Vehicle Owner State has been updated as the Primary Source.	General	ROCKFORD ADJUSTERONE	04/03/2023, 08:40:20 AM CST
Vehicle Owner State has been updated as the Secondary Source.	General	ROCKFORD ADJUSTERONE	04/03/2023, 08:40:12 AM CST
Repair Facility State has been updated as the Primary Source.	General	ROCKFORD ADJUSTERONE	04/03/2023, 08:40:12 AM CST

Results per page:

Claim Office Profiles

Introduction This section describes how to configure the **Claim Office Profiles**. Carriers can manager their claim office profiles here. This section will provide the details how to view, edit and create claim office profiles for your company.

Claim Offices

View Claim Office Profiles:

The claim office profile view provides a list of claim office profiles that exist for the carrier.

Part	Description
Count	The count of Claim Office Profiles is displayed in () next to the header.
Export	The Export icon will allow you to download an Excel file of the Claim Office Profiles.
Search	Use the Search field to find claim office profiles.
Claim Office Name	This is the name of the Claim Office(s) in the profile.
Branch Code	This is the Branch Code based on the claim office.
Address/ City/ State/ Zip Code	These columns display the location information of the Claim Office.
Modified By	This is the name of the user that created/modified the item in the description. If you hover over this name, a tool tip will be displayed with the user's login ID and email address.
Modified Date	This is the date and time the item in the description was created/modified.
Action	<p>The action column contains the Copy and Delete icon.</p> <ul style="list-style-type: none"> The Copy Data option allows you to copy the selected data to the desired Claim Office(s). The Copy Profile option allows you to copy the selected profile to create a new Claim Office Profile. The Delete icon allows you to remove the Custom Charge Category, once clicked a confirmation popup appears click Yes to confirm the deletion.

Claim Office Profiles

Manage the configuration details for your existing claim office profiles. The claim office profile list is generated based off of your current company registration information. You may add additional claim offices that are only used by the CCC ONE application using the **New Claim Office** button.

Claim Offices (2)

New Claim Office

<input type="checkbox"/>	Claim Office Name ^	Branch Code	Address	City	State	Zipcode	Modified By	Modified Date	Action
<input type="checkbox"/>	LAS VEGAS CLAIM OFFICE	LAS	513 S FLORIDA AVE	TAMPA	Florida	33602	ROCKFORD ADJUSTERONE	2/19/2023, 1:07:21 AM CST	
<input type="checkbox"/>	FLORIDA CLAIM OFFICE	FL	513 S FLORIDA AVE	TAMPA	Florida	33602	ROCKFORD ADJUSTERONE	2/19/2023, 1:04:47 AM CST	

Continued on next page

Claim Office Profiles, Continued

Claim Offices, continued

New Claim Office:

Follow the steps below to create a new claim office:

Step	Action
1	Select New Claim Office ; the New Claim Office popup opens. 
2	<p>Use the General section to specify the claim office name, address, and other details:</p> <ul style="list-style-type: none"> ○ Claim Office Name: Select a Claim Office name from the dropdown. Note: The Claim office must be configured in CLEAR to display. ○ Display Name: Populates once the claim office is selected from the Claim Office Name dropdown. ○ Unit: Enter a up to a four digit alphanumeric code. ○ Federal ID Number: Enter a up to a nine digit alphanumeric code. ○ CCC Location ID: Populates once the claim office is selected from the Claim Office Name dropdown. ○ Contact: Enter the First and Last Name ○ Message: Enter a message to appear on the Estimate of Record. ○ Address: Populates once the claim office is selected from the Claim Office Name dropdown. ○ Phone Number: Populates once the claim office is selected from the Claim Office Name dropdown. Add additional Phone Numbers as desired.

New Claim Office
✕

General

Disclaimer

Change Log

Make updates to all sections in your profile before saving changes. Changes will be deployed once they are saved.

Save Changes

Cancel

General Settings

Specify the claim office name, address, and other details below.

Claim Office Name (Required) ⓘ

Address Line 1 (Required)

Display Name (Required) ⓘ

Address Line 2

Unit

Federal ID Number

CCC Location ID

City (Required)

State (Required)

Zipcode (Required)

 -

Contact

Type

Message

Phone (Required)

+ Add Phone Number

Priority

0 / 500

Continued on next page

Claim Office Profiles, Continued

Claim Offices, continued, continued

New Claim Office (continued):

Follow the steps below to create a new claim office:

Part	Action
3	Use the Disclaimer section to specify the disclaimer type General/Alternative Parts and the text to be included. Note: The Disclaimer for each option can be written in English or Spanish.
4	The Change Log section displays a list of the claim office modification history. <ul style="list-style-type: none">• Select the filter icon to display the Filter Options. (see <i>Filter</i> on page 8 for additional details)• The Export icon will allow you to download an Excel file of the Change Log.
5	Click Save Changes to add the new Claim Office.

New Claim Office

Disclaimer

Specify the disclaimer text that will appear in the estimate reports for this claim office.

Disclaimer Type

General - English

Disclaimer Text

Please enter disclaimer text...

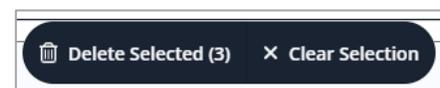
0 / 33000

Save Changes

Cancel

Delete Multiple Claim Office Profiles:

Use the checkboxes to select multiple Claim Office Profiles, click the **Delete Selected** Popup. Click **Yes** to confirm the deletion.



Continued on next page

Tax Profiles

Introduction

The **Tax Profiles** section describes how carriers can manage tax rates for Vehicles and Motorcycles for state, county, and municipalities; providing the details how to view, edit and create tax profiles for a company.

Note: There are carriers that utilize Automated Taxes (CCATR), functionality is impacted based on this.

Tax Profiles

It is recommended that you specify the tax rate for all of your states as a default. The state level settings will be used in the event that no county or municipal level profile is configured.

Part	Description
Export All	Click the Export All Tax Rate Profile Settings to download all the tax rate profile information segmented by Claim Type, Categories, etc. in an Excel file.
Count	The count of Claim Office Profiles is displayed in () next to the header.
Filter	Select the filter icon to display the Filter Options. (see <i>Filter on page 8 for additional details</i>)
Export	The Export icon will allow you to download an Excel file of the Claim Office Profiles.
Search	Use the Search field to find tax profiles listed.
Location	This displays the location within the State, County, or Municipality.
Location Type	This displays the location type: State, County, or Municipality.
State	This column displays the state the tax profile is located in.
County	This column displays the county the tax profile is located in.
Claim Type	This column displays the type of tax profile: Vehicle and/or Motorcycle.
Modified By	This is the name of the user that created/modified the item in the description. If you hover over this name, a tool tip will be displayed with the user's login ID and email address.
Modified Date	This is the date and time the item in the description was created/modified.
Action	The action column contains the Copy and Delete icon. <ul style="list-style-type: none"> The Copy Profile option allows you to copy the selected profile to create a new Tax Profile, after entering the desired location information. The Delete icon allows you to remove the Tax Profiles, once clicked a confirmation popup appears click Yes to confirm the deletion.

Tax Profiles Export All Tax Rate Profile Settings

Create and manage your tax rate settings by state, county or municipality below. It is recommended that you specify the tax rate for all of your states as a default. The state level settings will be used in the event that no county or municipal level profile is configured. Use the + **New Tax Profile** button to specify a new tax rate profile.

Profiles (1) ▼ 🔗

+ New Tax Profile

	Location	Location Type	State	County	Claim Type	Action
<input type="checkbox"/>	Illinois	State	Illinois		Vehicle, Motorcycle	📄 🗑️

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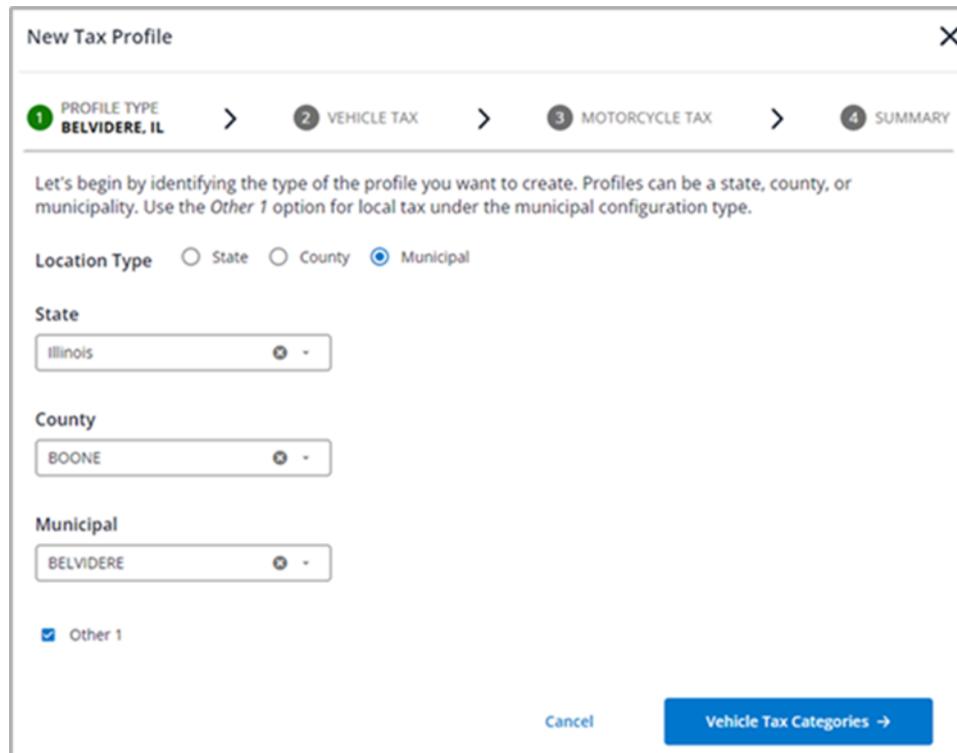
Tax Profiles, Continued

Tax Profiles, continued

Create New Tax Profile:

Follow the steps below to create a new claim office:

Step	Action
1	Click the New Tax Profile button, the New Tax Profile popup opens. 
2	Select a Location Type of State, County, and/or Municipal. Then select the appropriate option from the dropdowns that corresponds to the selected location type. Other 1 is the local tax category that can be applied. Note: Options populate based on the state and county selected.
3	Click the Configure Tax Rate button to continue; the Tax Rate section opens.



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Tax Profiles, Continued

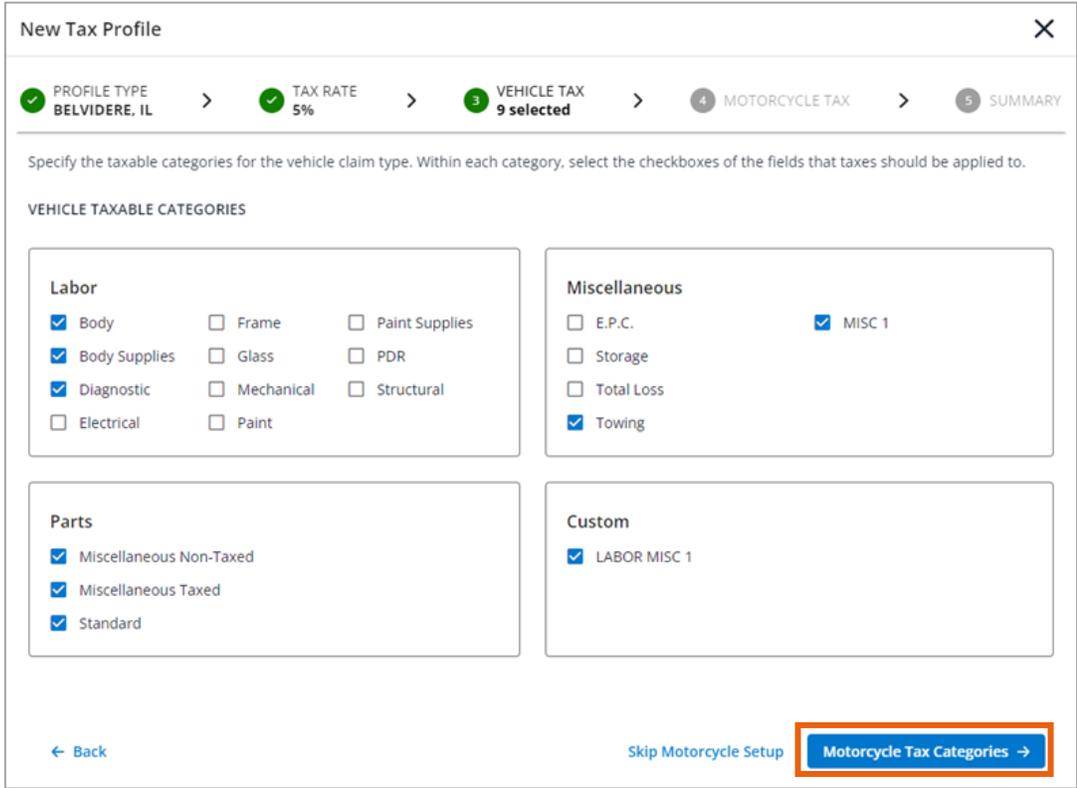
Tax Profiles, continued

Step	Action																								
4	<p>Enter the Tax Type and the Tax Rate information.</p> <ul style="list-style-type: none"> If you are entering a single rate, you can just enter the tax rate. <div data-bbox="337 499 1198 926"> <p>New Tax Profile</p> <p>PROFILE TYPE: BELVIDERE, IL > TAX RATE: 0% > VEHICLE TAX > MOTORCYCLE TAX > SUMMARY</p> <p>Specify your tax rate by single or tiered tax types. Use the Future Effective Date field if you wish for this tax profile to take effect at a later date. Future effective dates go live at 12:01 AM CST on the day specified.</p> <p>Future Effective Date: <input type="text" value="mm/dd/yy"/></p> <p>Tax Type: <input checked="" type="radio"/> Single Rate <input type="radio"/> Tiered Tax</p> <p>Tax Rate: <input type="text" value="0"/> %</p> <p>← Back Vehicle Tax Categories →</p> </div> <ul style="list-style-type: none"> If you are entering a tiered tax rate, you will need to enter the Start and End price range, and the Rate % and Surcharge \$. <div data-bbox="337 1041 1198 1640"> <p>New Tax Profile</p> <p>PROFILE TYPE: BELVIDERE, IL > TAX RATE: Tiered Tax > VEHICLE TAX > MOTORCYCLE TAX > SUMMARY</p> <p>Specify your tax rate by single or tiered tax types. Use the Future Effective Date field if you wish for this tax profile to take effect at a later date. Future effective dates go live at 12:01 AM CST on the day specified.</p> <p>Future Effective Date: <input type="text" value="mm/dd/yy"/></p> <p>Tax Type: <input type="radio"/> Single Rate <input checked="" type="radio"/> Tiered Tax</p> <table border="1"> <thead> <tr> <th colspan="2">Tax Tier \$ Range</th> <th colspan="2">Charges</th> </tr> <tr> <th>Start</th> <th>End</th> <th>Rate</th> <th>Surcharge</th> </tr> </thead> <tbody> <tr> <td>\$ 0</td> <td>\$ 1499.99</td> <td>1.5 %</td> <td>\$ 10</td> </tr> <tr> <td>\$ 1500</td> <td>\$ 2499.99</td> <td>0.75 %</td> <td>\$ 0</td> </tr> <tr> <td>\$ 2500</td> <td>\$ 2599.99</td> <td>0.25 %</td> <td>\$ 0</td> </tr> <tr> <td>\$ 2600</td> <td></td> <td>0 %</td> <td>\$ 0</td> </tr> </tbody> </table> <p>← Back Vehicle Tax Categories →</p> </div>	Tax Tier \$ Range		Charges		Start	End	Rate	Surcharge	\$ 0	\$ 1499.99	1.5 %	\$ 10	\$ 1500	\$ 2499.99	0.75 %	\$ 0	\$ 2500	\$ 2599.99	0.25 %	\$ 0	\$ 2600		0 %	\$ 0
Tax Tier \$ Range		Charges																							
Start	End	Rate	Surcharge																						
\$ 0	\$ 1499.99	1.5 %	\$ 10																						
\$ 1500	\$ 2499.99	0.75 %	\$ 0																						
\$ 2500	\$ 2599.99	0.25 %	\$ 0																						
\$ 2600		0 %	\$ 0																						
5	<p>Click the Vehicle Tax Categories button to continue, or if desired skip and enter the Motorcycle Tax Categories information only. Note: At least one tax category is required.</p>																								

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Tax Profiles, Continued

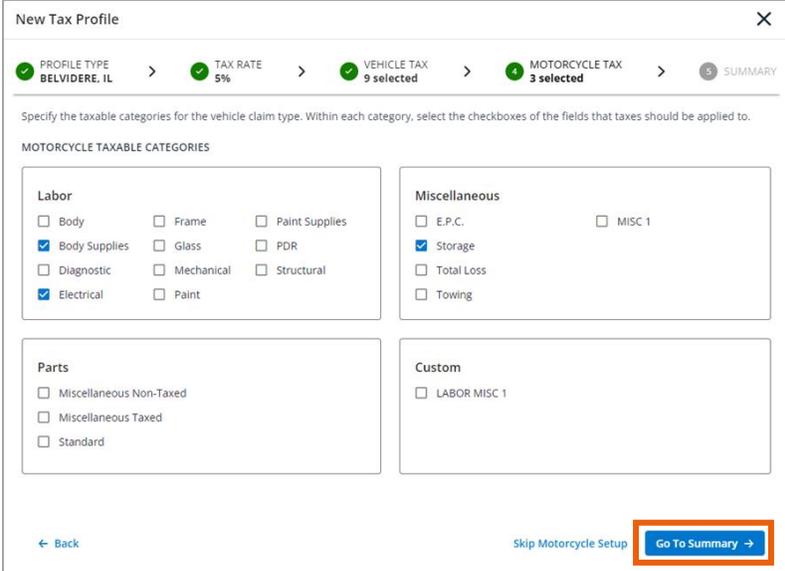
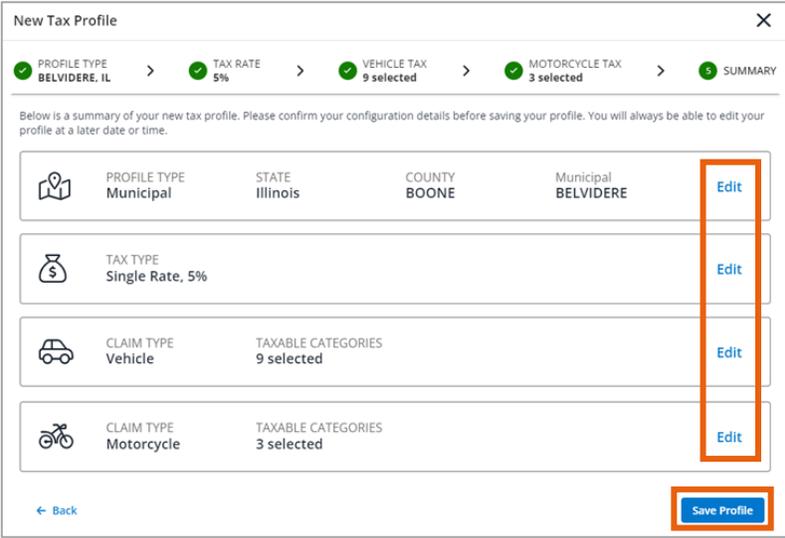
Tax Profiles, continued

Step	Action
6	Taxable Categories are used within CCC ONE Estimating to determine what is taxable on the estimate. Select an option(s) from the category or categories as desired.
7	<p>Click the Motorcycle Tax Categories button to continue or if desired, skip and enter Summary information. Note: At least one tax category is required.</p>  <p>The screenshot shows a 'New Tax Profile' window with a progress bar at the top. The progress bar has five steps: 1. PROFILE TYPE (BELVIDERE, IL), 2. TAX RATE (5%), 3. VEHICLE TAX (9 selected), 4. MOTORCYCLE TAX, and 5. SUMMARY. Below the progress bar, there is a heading 'VEHICLE TAXABLE CATEGORIES' and a sub-heading 'Specify the taxable categories for the vehicle claim type. Within each category, select the checkboxes of the fields that taxes should be applied to.' There are four main category boxes: 'Labor', 'Miscellaneous', 'Parts', and 'Custom'. Each box contains several checkboxes, some of which are checked. The 'Motorcycle Tax Categories' button at the bottom right is highlighted with a red box.</p>

Continued on next page

Tax Profiles, Continued

Tax Profiles, continued

Step	Action
8	Taxable Categories are used within CCC ONE Estimating to determine what is taxable on the estimate. Select an option(s) from the category or categories as desired.
9	<p>Click the Go To Summary button to continue.</p> 
10	<p>Review the summary page for an overview of the tax profile data. Select Edit to edit a given section. Once satisfied with the setup, click Save Profile.</p> 

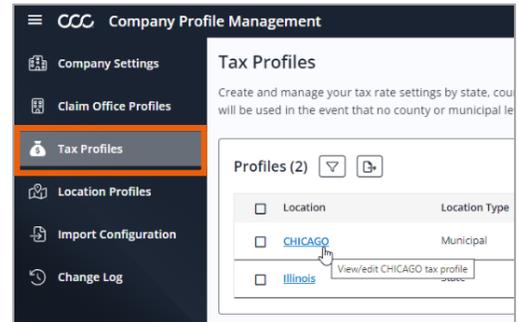
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Tax Profiles, Continued

Tax Profiles, continued

Follow the steps below to edit a Tax Rate Profile:

Step	Action
1	Select a Tax Profile from the list of locations to edit; the popup to edit the tax rate profile opens.
2	Select an available option, then make the desired changes.
3	Click Save Changes once your changes are made.



Location Profiles

Introduction

The **Location Profiles** section allows you to create and manage location-based settings by state, county, or zip code(s).

Location Profiles

Part	Description
Export All	Click the Export All Tax Rate Profile Settings to download all the tax rate profile information segmented by Claim Type, Categories, etc. in an Excel file.
Count	The count of Claim Office Profiles is displayed in () next to the header.
Filter	Select the filter icon to display the Filter Options. (see <i>Filter on page 8 for additional details</i>)
Search	Use the Search field to find location profiles listed.
Location	This displays the name on the location profile such as State, County, Municipality, Zip Code, or Zip Code Group.
Type	This displays the location type: State, County, or Zip Code
State	This column displays the state the location profile is located in.
Modified By	This is the name of the user that created/modified the item in the description. If you hover over this name, a tool tip will be displayed with the user's login ID and email address.
Modified Date	This is the date and time the item in the description was created/modified.
Action	<p>The action column contains the Copy and Delete icon.</p> <ul style="list-style-type: none"> The Copy Data option allows you copy the selected data to the desired Claim Office(s). The Copy Profile option allows you to copy the selected profile to create a new Claim Office Profile. The Delete icon allows you to remove the Location Profiles, once clicked a confirmation popup appears click Yes to confirm the deletion.

Location Profiles [Export All Location Profile Settings](#)

Create and manage your location based settings by state, county or zip code below. It is recommended that you create a profile for all your states as a default. The state level settings will be used in the event that no county or zip code level profile is configured. Use the **New Location** button to create a new location profile.

Locations (28) [New Location](#)

<input type="checkbox"/>	Location	Type	State	Modified By	Modified Date	Action
<input type="checkbox"/>	Alabama	State	Alabama	ROCKFORD ADJUSTERONE	04/04/2023, 04:49:53 PM CST	
<input type="checkbox"/>	53233	Zip Code	Wisconsin	ROCKFORD ADJUSTERONE	03/31/2023, 06:15:28 AM CST	
<input type="checkbox"/>	South Carolina	State	South Carolina	ROCKFORD ADJUSTERONE	03/31/2023, 06:15:28 AM CST	
<input type="checkbox"/>	30002	Zip Code	Georgia	ROCKFORD ADJUSTERONE	03/31/2023, 06:15:28 AM CST	
<input type="checkbox"/>	Wisconsin:City(s)	Zip Code	Wisconsin	ROCKFORD ADJUSTERONE	03/31/2023, 06:15:28 AM CST	
<input type="checkbox"/>	30016	Zip Code	Georgia	ROCKFORD ADJUSTERONE	03/31/2023, 06:15:28 AM CST	
<input type="checkbox"/>	99502	Zip Code	Alaska	ROCKFORD ADJUSTERONE	03/31/2023, 06:15:28 AM CST	
<input type="checkbox"/>	Aleutians East	County	Alaska	ROCKFORD ADJUSTERONE	03/31/2023, 06:15:28 AM CST	
<input type="checkbox"/>	30017	Zip Code	Georgia	ROCKFORD ADJUSTERONE	03/31/2023, 06:15:28 AM CST	

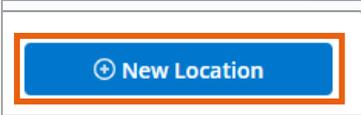
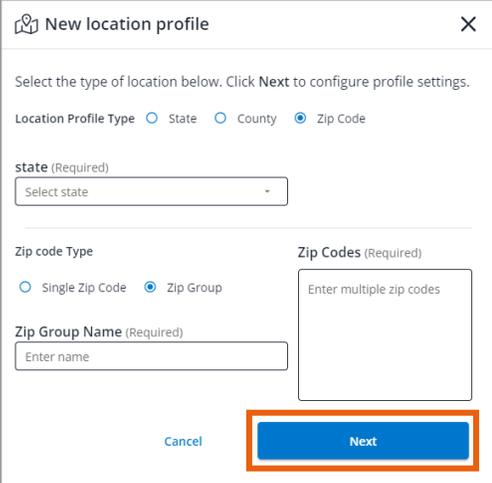
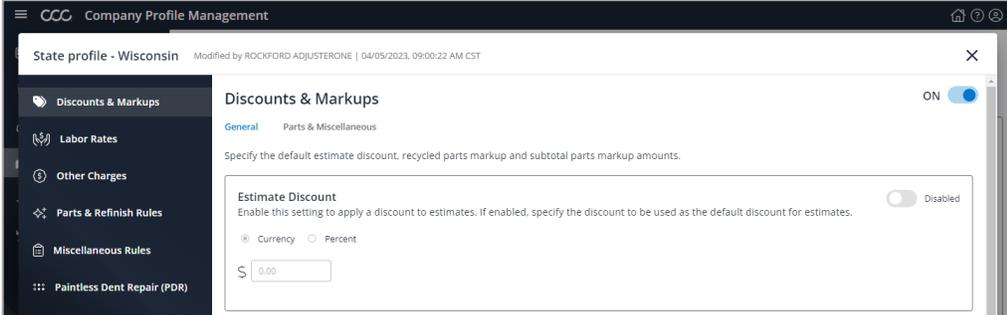
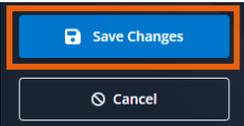
Continued on next page

Location Profiles, Continued

Location Profiles, continued

Create New Location Profile:

Follow the steps below to create a new location profile:

Step	Action
1	<p>Click the New Location button; the new location profile panel appears.</p> 
2	<p>Select a Location Profile Type, of State, County, or Zip Code. Then select the appropriate option from the dropdowns that corresponds to the selected location type.</p> <ul style="list-style-type: none"> • State: Select the state from the dropdown. • County: Select the state then county from the dropdown. • Zip Code: Select the state from the dropdown, then select the Single Zip Code or Zip Group option. If entering multiple zip codes enter a group name and each zip code to include.  <p>Click Next to continue. The location profile is created, and the profile configuration popup opens.</p>
3	<p>In the Profile popup select an option to add profile configuration details, (see pages 20-31 for a description of each configuration option). Use the toggle to enable the configuration. Note: Enabling a profile category will override any local CCC ONE Estimating profiles.</p> 
4	<p>Click the Save Changes button once you have made updates to all sections in your profile before saving changes. Changes will be deployed once they are saved.</p> 

Continued on next page

Location Profiles, Continued

Location Profiles, continued

The **Discounts & Markups** section when enabled provides the ability to set up default discounts and markups.

General Tab:

- **Estimate Discount:** Enable this setting to apply a discount to estimates, then specify the discount to be used as the default discount for estimates.
- **Recycled Parts Markup:** Enable this setting to apply a markup to recycled parts, then specify the markup percentage to be used as the default markup for recycled parts.
- **Subtotal Part Markup:** Enable this setting to apply a markup to parts subtotals for vehicles and motorcycles, then specify the markup percentage to be used as the default markup for parts subtotals.

Discounts & Markups ON

[General](#) [Parts & Miscellaneous](#)

Specify the default estimate discount, recycled parts markup and subtotal parts markup amounts.

Estimate Discount Disabled

Enable this setting to apply a discount to estimates. If enabled, specify the discount to be used as the default discount for estimates.

Currency Percent

\$

Recycled Parts Markup Disabled

Enable this setting to apply a markup to recycled parts. If enabled, specify the markup percentage to be used as the default markup for recycled parts.

%

Subtotal Parts Markup Disabled

Enable this setting to apply a markup to parts subtotals. If enabled, specify the markup percentage to be used as the default markup for parts subtotals.

Vehicle %

Motorcycle %

Continued on next page

Location Profiles, Continued

Location Profiles, continued

Parts & Miscellaneous tab: Specify the parts and miscellaneous category discounts.

Part	Description
Count	The count of Claim Office Profiles is displayed in () next to the header.
Export	The Export icon will allow you to download an Excel file of the Parts and Miscellaneous items.
Claim Type	Select Vehicle or Motorcycle from the dropdown.
Search	Use the Search field to find location profiles listed.
Edit All Discounts	Click the Edit All Discounts button to perform multiple changes at one time.
Code	This displays the internal code for the category.
Category	This displays the name for the category.
Category Type	This displays the category type of Miscellaneous, Parts, or TBD.
Discount%	This column displays the discount percentage for the Part or Miscellaneous item. This will become editable when the edit icon or edit all button is clicked. Valid values are 0.00 - 999.99.
Modified By	This is the name of the user that created/modified the item in the description. If you hover over this name, a tool tip will be displayed with the user's login ID and email address.
Modified Date	This is the date and time the item in the description was created/modified.
Action	This column contains the edit icon to edit an individual line's discount percentage.

Discounts & Markups ON

General [Parts & Miscellaneous](#)

Specify the parts and miscellaneous category discounts. Click the **Edit All Discounts** button to perform multiple changes at one time or use the inline to edit individual lines.

Parts & Miscellaneous (8) | CLAIM TYPE Edit All Discounts

Code	Category	Category Type	Discount %	Modified By	Modified Date	Action
DD	Domestic	Parts	0.0%			
DF	Foreign	Parts	0.0%			
DG	Glass	Parts	0.0%			
EPC	E.P.C.	Miscellaneous	0.0%			
STG	Storage	Miscellaneous	0.0%			

Continued on next page

Location Profiles, Continued

Location Profiles, continued

The **Labor Rates** section when enabled provides the ability to view labor rates and discounts.

Part	Description
Export	The Export icon will allow you to download an Excel file of the Labor Rates.
Claim Type	Select Vehicle or Motorcycle from the dropdown.
Search	Use the Search field to find location profiles listed.
Edit All rates	Click the Edit All Rates button to perform multiple changes at one time.
Code	This displays the internal code for the category.
Category	This displays the name for the category.
Category Type	This displays the category type of Labor or Custom .
Rate \$	This displays the dollar amount of the labor rate; this will become editable when the edit icon or edit all button is clicked. Valid values are 0.00 - 999.99.
Discount%	This column displays the discount percentage, this will become editable when the edit icon or edit all button is clicked. Valid values are 0.00 - 99.9.
Modified By	This is the name of the user that created/modified the item in the description. If you hover over this name, a tool tip will be displayed with the user's login ID and email address.
Modified Date	This is the date and time the item in the description was created/modified.
Action	This column contains the edit icon to edit an individual line's discount percentage.

Labor Rates

Specify your labor rates and discounts. Click the **Edit All Rates** button to perform multiple changes at one time, or use the inline to edit individual lines.

ON

Labor Rates | CLAIM TYPE Vehicle Q Search... Edit All Rates

Code	Category	Category Type	Rate \$	Discount %	Modified By	Modified Date	Action
B	Body	LABOR	\$ 0	0 %			
BS	Body Supplies	LABOR	\$ 0	0 %			
D	Diagnostic	LABOR	\$ 0	0 %			
E	Electrical	LABOR	\$ 0	0 %			
F	Frame	LABOR	\$ 0	0 %			

Continued on next page

Location Profiles, Continued

Location Profiles, continued

The **Other Charges** section when enabled allows carriers to manager their other charge settings.

Part	Description
Count	The count of Other Charges is displayed in () next to the header.
Export	The Export icon will allow you to download an Excel file of the Labor Rates.
Search	Use the Search field to find location profiles listed.
New Charge	Click the New Charge button to create a new charge. The New Charge fields appear; enter a Description, select a Category, then Enter a Price. Click Create Charge to add it to the list.
Description	This displays the other charge name. Click the description name to edit the Price information.
Category	This displays the name for the category.
Price \$	This displays the dollar amount of the charge.
Modified By	This is the name of the user that created/modified the item in the description. If you hover over this name, a tool tip will be displayed with the user's login ID and email address.
Modified Date	This is the date and time the item in the description was created/modified.
Actions	This column contains the delete icon to remove added charges. Note: Towing, Storage, and E.P.C charges cannot be removed.

Other Charges

ON

Create and manage other charges. Use the **New Charge** button to create other charge types.

Charges (4)

Q Search...

New Charge

	Description	Category	Price \$	Modified By	Modified Date ▾	Action
<input type="checkbox"/>	Other	MISC1	\$100			
<input checked="" type="checkbox"/>	E.P.C.	E.P.C.	\$50			
<input checked="" type="checkbox"/>	Storage	Storage	\$50			
<input checked="" type="checkbox"/>	Towing	Towing	\$200			

Continued on next page

Location Profiles, Continued

Location Profiles, continued

The **Parts & Refinish Rules** section when enabled provides part and refinish rule settings for the carrier.

Parts Terminology: Specify the Aftermarket, Optional OEM, and Recycled parts terminology that appears on estimates.

- **Aftermarket:** Select A/M or Non-OEM from the dropdown.
- **Optional OEM:** Select Alt OEM, Non-OEM, OEM, or Opt OEM from the dropdown.
- **Recycled:** Select LKQ, RCY, or USED.

Refinish/ Materials Thresholds: Specify the thresholds for maximum clear coat hours and paint materials to be used on estimates.

- **Maximum Clear Coat Hours:** Defaults to 2.5 hours. Enter a Min-Max value of 0.0-99.9 hours.
- **Maximum One, Two, Three - Stage Paint Supplies:** Enter a Min-Max value of \$0.00-\$9,999.99.
- **Paint Supply Rate Includes:** This option allows users to toggle between Paint supply rates including Materials or based on Paint alone. Select Paint & Materials (Default) or Paint Only.
- **Calculate Clear Coat Materials by:** This option calculates the clear coat costs on the estimate either based on the actual hours, which is the default option, or based on the maximum hours configured in Refinish / Materials Thresholds table. Select Actual Hours (Default) or Maximum Hours.

Tire Database: Specify the Zip code range to be used when searching for tire information.

Parts & Refinish Rules ON

Specify parts terminology and refinish and material thresholds to be used on estimates.

Parts Terminology
Specify the aftermarket, optional OEM, and recycled parts terminology that appears on estimates.

Aftermarket	Optional OEM	Recycled
<input type="text" value="A/M"/>	<input type="text" value="Opt OEM"/>	<input type="text" value="LKQ"/>

Refinish / Materials Thresholds
Specify thresholds for maximum clear coat hours and paint materials to be used on estimates.

Maximum Clear Coat Hours	<input type="text" value="2.5"/> hrs.	Paint Supply Rate Includes:	<input checked="" type="radio"/> Paint & Materials (Default)	<input type="radio"/> Paint Only
Maximum One-Stage Paint Supplies	\$ <input type="text" value="0.00"/>	Calculate Clear Coat Materials by:	<input checked="" type="radio"/> Actual Hours (Default)	<input type="radio"/> Maximum Hours
Maximum Two-Stage Paint Supplies	\$ <input type="text" value="0.00"/>			
Maximum Three-Stage Paint Supplies	\$ <input type="text" value="0.00"/>			

Tire Database
Specify the zip code range to be used when searching for tire information.

Start	End
<input type="text" value="01001"/>	<input type="text" value="99999"/>

Continued on next page

Location Profiles, Continued

Location Profiles, continued

The **Miscellaneous Rules** section provides Miscellaneous Rules settings for the carrier.

- **Reconditioned/Recorded Part Taxes:** Enable this setting to apply taxes on reconditioned and recorded parts.
- **Body Supplies:** Use the checkboxes to specify the settings to allow body supplies on specific operations: Include Replace/Section Hours, Repair Hours, R&I Hours, and/or Operation Hours.
- **Betterments:** Specify the settings regarding allowing betterment on parts, labor hours and refinish hours.
 - **Include Deductibles in:** Estimate Totals or Settlement Totals
 - Select Allow Betterments on Towing, Storage, and/or E.P.C. Charges.
- **Other Charges:** Specify the settings regarding adding the following other charges:
 - Allow Additional Towing, Storage, and/or E.P.C. Charges.
- **Estimating Reports:** Select options for the default supplement report format.
 - **Default Supplement Report format:** Select either Supplement with Summary (default option), Supplement Summary Only, or Either from the dropdown.
 - **Select a checkbox for** Print Recall Information on Estimate Report, Print Alternate Parts Usage Information on Estimate Report, Print Zeros for Numeric Fields, Allow Sublet Glass Total Adjustments, and/or Print Underwriting Company.

Miscellaneous Rules ON

Specify miscellaneous rules regarding reconditioned or recored part taxes, betterments, body supplies, and other charges.

Reconditioned/Recorded Part Taxes

Enable this setting to apply tax on reconditioned and recored parts. The default value for this setting is Enabled Enabled

Body Supplies

Specify settings to allow body supplies on specific operations.

Include Replace/Section Hours
 Include Repair Hours
 Include R&I Hours
 Include Operation Hours

Betterments

Specify settings regarding allowing betterment on parts, labor hours and refinish hours.

Include Deductibles in Estimate Totals Settlement Totals

Allow Betterments on Part Price
 Allow Betterments on Labor Hours
 Allow Betterments on Refinish Hours

Other Charges

Specify settings regarding adding other charges for towing, storage, and E.P.C. charges.

Allow Addition of Towing Charges
 Allow Addition of Storage Charges
 Allow Addition of E.P.C. Charges

Estimating Reports

Select options for the default supplement report format.

Default Supplement Report format:

Print Recall Information on Estimate Report
 Print Alternate Parts Usage Information on Estimate Report
 Print Zeros for Numeric Fields
 Allow Sublet Glass Total Adjustments
 Print Underwriting Company

Continued on next page

Location Profiles, Continued

Location Profiles, continued

The **Paintless Dent Repair (PDR)** section, when enabled allows you to specify PDR parameters by entering the end (inclusive) number of dents for each line and specifying **Hour** or **Dollar** amounts for the dent sizes. **Note:** The starting number of dents for the following line will automatically be set at one number greater than the end number of the previous line.

Paintless Dent Repair (PDR) ON

Specify Paintless Dent Repair (PDR) parameters by entering the end (inclusive) number of dents for each line and specifying hour or dollar amounts for the dent sizes. The starting number of dents for the following line will automatically be set at one number greater than the end number of the previous line.

PDR Values
Select hours or dollars for the PDR value type.

Hours
 Dollars (Default)
 PDR Amounts Taxable

	Number of Dents		Dent Size			
	Start	End	Dime	Nickel	Quarter	Half Dollar
Hood	001	005	65	75	100	125
<input checked="" type="radio"/> Fender	006	015	100	125	150	175
Roof	016	030	150	200	225	0
Door	031	050	200	225	0	0
Quarter Panel	051	999	0	0	0	0
Trunk Lid						
Cowl						
Others						

Continued on next page

Location Profiles, Continued

Location Profiles, continued

The **Part Code** section, when enabled provides a list of part codes that exist for the carrier.

Part	Description
Count	The count of Other Charges is displayed in () next to the header.
Filter	The filter option allows you to filter the part codes displayed by selecting from the following categories: Claim Type, Operation, Part Type, Price Category, Labor Category, and/or Group . Note: Only one option per category can be selected, not all categories need a selection.
Show/Hide Columns	Select to show or hide columns displayed; the Code and Description columns are required.
Edit Part Order	Select to specify the order of the part codes.
Export	The Export icon will allow you to download an Excel file of the Part Codes.
Claim Type	Select to view part codes with a Motorcycle, Vehicle, or All from the Claim Type dropdown.
Search	Use the Search field to find location profiles listed.
New Part Code	Click the New Charge button to create a new charge. The New Charge fields appear; enter a Description, select a Category, then Enter a Price. Click Create Charge to add it to the list.
Vehicle/ Motorcycle #	This displays the sequence number. Note: If a part code applies to both Vehicle and Motorcycle, it will follow the numeric order within each separate claim type.
Code	This displays the part code entered when the part code was created.
Description	This displays the other charge name. Click the description name to edit the Price information.
Group	This displays the predefined group selected.
Operation	This displays the predefined operation selected.
Part Type	This displays the predefined part type selected.
Claim Type	This displays the claim type Vehicle or Motorcycle selected.
Price \$	This displays the dollar amount of the charge.
Price Category	This displays the price category Standard, Misc. Taxed, or Misc. Non-Taxed.
Labor Hours	This displays the labor hours entered.
Labor Category	This displays the predefined labor category selected.
Paint Hours	This displays the paint hours entered.
Modified By	This is the name of the user that created/modified the item in the description. If you hover over this name, a tool tip will be displayed with the user's login ID and email address
Modified Date	This is the date and time the item in the description was created/modified.
Actions	This column contains the delete icon to remove the part codes. Note: If part code is deleted backfilling occurs, meaning the sequence numbers shift up to maintain order.

The screenshot shows the 'Part Code' management interface. At the top right, there is a toggle switch labeled 'ON' with a blue indicator, which is highlighted with an orange box. Below the toggle, the interface includes a search bar and a 'New Part Code' button. The main area displays a table with the following columns: Vehicle #, Motorcycle #, Code, Description, Group, Operation, Part Type, Claim Type, Price \$, Price Category, Labor Hours, Labor Category, Paint Hours, and Action. The table contains several rows of data, including part codes like 'mc123', '7777', 'YEmc1', 'ABC28', and 'NEM01'.

Continued on next page

Location Profiles, Continued

Location Profiles, continued

New Part Code:

Follow the steps below to create a new part code:

- Select **New Part Code**, the New Part Code panel opens.

Edit Part Code:

Follow the steps below to edit a part code:

- Select a **Part Code**, the Edit Part Code panel opens.
 - If desired Edit the sequence number for the part code *or* select the **Edit Part Order** button to open the **Specify Part Code Order** side panel (see section below for additional details).

Next, enter or select the information in the **New/Edit Part Code** panels (see page 27 for a description of each Part Code item). When finished select **Save**.

Form fields and values:

- Code (Required): ABCD
- Description (Required): TEST DESC
- Claim Type (Required): Vehicle, Motorcycle
- Vehicle Order (Required): 6
- Motorcycle Order (Required): 4
- Group: FLUIDS
- Operation: Replace
- Part Type: OEM
- Price Category: Standard
- Labor Category: Mechanical
- Price: \$100.00
- Labor Hours: 1.0
- Paint Hours: 0.0

Form fields and values:

- Code (Required): 77777
- Description (Required): TEST DESC
- Claim Type (Required): Vehicle, Motorcycle
- Vehicle Order (Required): 1
- Motorcycle Order (Required): 1
- Group: AIR CONDITIONER & HEATER
- Operation: Section
- Part Type: Reconditioned
- Price Category: Standard
- Labor Category: Body
- Price: \$0.00
- Labor Hours: 0.0
- Paint Hours: 0.0

Specify Part Code Order:

Select the **Edit Part Order** button  to open the **Specify Part Code Order** side panel.

- Select to view the **Vehicle** or **Motorcycle** part codes.
- Click and drag the **Part Codes** to the desired order.

When finished select **Save**.

Note: Only **Carrier Admins** can modify and manage sequence order.

Table data:

Order	Code	Description
1	77777	asdasd
2	VEmic1	TEST DESC
3	ABC28	TEST DESC
4	NEW01	TEST DESC
5	BLU63	TEST DESC

Continued on next page

Location Profiles, Continued

Location Profiles, continued

The **Total Loss Thresholds** section when enabled provides a list of Total Loss Thresholds:

Part	Description
Count	The count of Total Loss Thresholds is displayed in () next to the header.
Export	The Export icon will allow you to download an Excel file of the Total Loss Thresholds.
Search	Use the Search field to find Total Loss Thresholds listed.
New TL Threshold	Click the New TL Threshold button to create a new total loss threshold the New Total Loss Thresholds fields appear.
Description	This displays the other charge name. Click the description name to edit the Price information.
Category	This displays the name for the category.
Price \$	This displays the dollar amount of the charge.
Modified By	This is the name of the user that created/modified the item in the description. If you hover over this name, a tool tip will be displayed with the user's login ID and email address.
Modified Date	This is the date and time the item in the description was created/modified.
Actions	This column contains the delete icon to remove added charges. Note: The default Vehicle and Motorcycle charges cannot be removed.

Total Loss Thresholds

ON

Create and manage total loss thresholds. Use the **New TL Threshold** button to create a new total loss threshold.

Total Loss Thresholds (3)

New TL Threshold

<input type="checkbox"/>	Claim Type	Vehicle Make	Standard %	Older Model %	Older Model Year	Modified By	Modified Date	Action
<input checked="" type="checkbox"/>	Vehicle	Default	0%	0%	1966			
<input checked="" type="checkbox"/>	Motorcycle	Default	0%	0%	1986			
<input type="checkbox"/>	Vehicle	Acura	70%	50%	1966			

Continued on next page

Location Profiles, Continued

Location Profiles, continued

New Total Loss Threshold:

Follow the steps below to create a Total Loss Threshold:

- Select **New Part Code**; the New Total Loss Threshold panel opens.

Edit Total Loss Threshold:

Follow the steps below to edit a Total Loss Threshold:

- Select a **Claim Type**; the Edit Total Loss Threshold panel opens.

Next, follow these steps to enter or select the information in the **New/Edit Total Loss Threshold** panels:

Step	Action
1	Select a Claim Type .
2	Select a Make .
3	Enter a Standard and Older Model percentage
4	Enter a year for the Older Model .
5	Click Save to add it to the list.

☰ New Total Loss Threshold
✕

Enter total loss threshold details below.

Claim Type Vehicle Motorcycle

Make

Standard %

Older Model %

Older Model Year

Cancel
Save

✎ Edit Total Loss Threshold
✕

Enter total loss threshold details below.

Claim Type Vehicle Motorcycle

Make

Standard %

Older Model %

Older Model Year

Cancel
Save

Continued on next page

Location Profiles, Continued

Location Profiles, continued

The **Change Log** section provides the list of the Location profile modification history.

Part	Description
Count	The count of Change Logs is displayed in () next to the header.
Filter	The filter option allows you to filter the change logs displayed by selecting from the filter categories that appear.
Export	The Export icon will allow you to download an Excel file of the Change Log.
Search	Use the Search field to find Change Logs listed.
Description	This displays a description of the change that occurred. If available, click the description name to view additional change log entry details.
Section	This displays the section that had a change.
Modified By	This is the name of the user that created/modified the item in the description. If you hover over this name, a tool tip will be displayed with the user's login ID and email address.
Modified Date	This is the date and time the item in the description was created/modified.

Change Log

This page contains a log of changes that have been implemented to the setting of this profile. The most recent changes can be found at the top.

History (3) ▼ 📄 Q Search...

Description	Section	Modified By	Modified Date ▼
Vehicle- ACUR make has been created.	Total Loss Thresholds	ROCKFORD ADJUSTERONE	04/06/2023, 08:55:39 AM CST
Vehicle- AMGE make has been created.	Total Loss Thresholds	ROCKFORD ADJUSTERONE	04/06/2023, 08:55:39 AM CST
Total Loss Thresholds has been enabled.	Total Loss Thresholds	ROCKFORD ADJUSTERONE	04/06/2023, 08:55:39 AM CST

Import Configurations

Introduction The **Import Configurations** section describes how carriers can upload and download rates to the company profile, view the upload status, download import history, and more.

Import Configurations

Part	Description
Download Templates & State Lists	The Download Templates & State Lists link opens a panel where you can download the template to import the labor and tax rates.
Filter	The filter options In Progress , Completed Imports , Completed with Errors , and Failed Imports show the count of rates in each category. Click a filter category to see the Import History by that category.
Count	The count of Rates is displayed in () next to the header.
Export	The Export icon will allow you to download an Excel file of the Import History.
Search	Use the Search field to find the Import History listed.
Upload Rate	Click the Upload Rate button to upload an Excel file of Labor & Discount Rates or Tax Rates .
ID	This displays the ID of the labor rate.
Filename	This displays the file name of the labor rate.
Status	This displays the upload status of the file Completed , In Progress , Completed with Errors , or Failed .
Type	This displays the type of rate associated to the linked file.
Created By	This is the name of the user that created/modified the item in the description. If you hover over this name, a tool tip will be displayed with the user's login ID and email address.
Created Date	This is the date and time the item in the description was created.
Completed Date	This is the date and time the item in the description was completed.

Uploading Rates [Download Templates & State Lists](#)

Use the available Labor and Tax Rate templates to add and/or modify larger sets of configuration changes for your company. Below is the list of all uploaded rate configurations using either the Labor and/or Tax rate templates. Refer to the [Importing Labor & Tax Rates job aid](#) for additional information.

☰ In Progress 0

🕒 Completed Imports 1

🚫 Completed with Errors 0

🚩 Failed Imports 2

Import History (3) 🔍 Search... 📄 Upload Rate

ID	Filename	Status	Type	Created By	Created Date	Completed Date
3	Labor_Rates_Exported_001	🕒 Completed	LABOR RATE	ROCKFORD ADJUSTERONE	3/31/2023, 1:15:27 AM CST	3/31/2023, 1:15:28 AM CST
2	Labor_Rates_Exported_001	🚩 Failed	LABOR RATE	ROCKFORD ADJUSTERONE	3/31/2023, 12:40:01 AM CST	3/31/2023, 12:40:02 AM CST
1	Labor_Rates_Exported_001	🚩 Failed	LABOR RATE	ROCKFORD ADJUSTERONE	3/31/2023, 12:38:39 AM CST	3/31/2023, 12:38:40 AM CST

Continued on next page

Import Configurations, Continued

Import Configurations, continued

Upload Rate:

Follow the steps below to upload a **Labor & Discount Rates** or **Tax Rates**:

Step	Action
1	Click the Upload Rate button; the Upload Rates popup opens.
2	Select a Rate Type of Labor & Discount Rates or Tax Rates .
3	Click Choose file ; your file explorer opens.
4	Select the appropriate Excel file, then click Open . The selected file will appear in the File area of the Upload Rates popup.
5	Click Upload ; the rate will appear.

Download Labor and Tax Rate Templates:

Click the **Download Templates & State Lists** link to open a panel where you can download the template to import the labor and tax rates.

Change Log

Introduction The **Change Log** section provides the list of the Location profile modification history.

Change Log

Part	Description
Count	The count of Change Logs is displayed in () next to the header.
Filter	The filter option allows you to filter the change log displayed by selecting from the following categories.
Export	The Export icon will allow you to download an Excel file of the Change Log.
Search	Use the Search field to find Change Logs listed.
Description	This displays a description of the change that occurred. If available, click the description name to jump to the Company Profile Management options for that change.
Section	This displays the section that had a change.
Modified By	This is the name of the user that created/modified the item in the description. If you hover over this name, a tool tip will be displayed with the user's login ID and email address.
Modified Date	This is the date and time the item in the description was created/modified.

Change Log

This page contains a log of changes that have been implemented to the setting of this profile. The most recent changes can be found at the top.

History (28)

Description	Section	Modified By	Modified Date ▾
Wisconsin has been modified.	Location Profiles	ROCKFORD ADJUSTERONE	04/06/2023, 08:55:39 AM CST
Wisconsin has been created.	Location Profiles	ROCKFORD ADJUSTERONE	04/05/2023, 09:00:22 AM CST
Adams has been deleted.	Location Profiles	ROCKFORD ADJUSTERONE	04/05/2023, 08:59:39 AM CST
Colorado has been deleted.	Location Profiles	ROCKFORD ADJUSTERONE	04/05/2023, 08:59:37 AM CST
Adams has been created.	Location Profiles	ROCKFORD ADJUSTERONE	04/05/2023, 08:59:20 AM CST
Colorado has been created.	Location Profiles	ROCKFORD ADJUSTERONE	04/05/2023, 08:58:50 AM CST
Hartford has been deleted.	Location Profiles	ROCKFORD ADJUSTERONE	04/04/2023, 05:42:55 PM CST
Hartford has been created.	Location Profiles	ROCKFORD ADJUSTERONE	04/04/2023, 05:42:46 PM CST
Arizona has been created.	Location Profiles	ROCKFORD ADJUSTERONE	04/04/2023, 05:39:28 PM CST
Alabama has been created.	Location Profiles	ROCKFORD ADJUSTERONE	04/04/2023, 04:49:53 PM CST
CHICAGO has been created.	Tax Profiles	ROCKFORD ADJUSTERONE	04/04/2023, 09:22:32 AM CST
SALT LAKE CITY CLAIM OFFICE 2 has been created.	Claim Office Profiles	ROCKFORD ADJUSTERONE	04/03/2023, 03:05:58 PM CST

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