

Batch Update in the CCC Portal

Overview: Batch Update Module

The Batch Update module displays in the Maintain Appraiser page and the Maintain Reinspector page for users who have the correct role and permission. The module functions the same on either page to update data for either appraisers or reinspectors. For example, if your file contains reinspector data, you can use the Batch Update module on Maintain Appraiser page to complete your task.

Overview: Batch Updating Territories

This feature allows you to add RF, Staff Appraiser and Independent Appraiser territory coverage types of Primary (1), Secondary (2) and Tertiary (3) details in a batch action.

Backup Territory (Staff Appraisers / Independent Appraisers):

Provides a backup staff appraiser or independent appraiser for the primary independent, or staff appraiser for an area or region when the primary is on vacation.

Primary territory is identified with a '1'; Secondary territory is identified with a '2'; and Tertiary territory is identified with a '3'.

Backup Territory (Reinspector):

The reinspection assignment is created for the backup reinspector with the secondary territory coverage **Zip Code** setup that matches the zip code in the search:

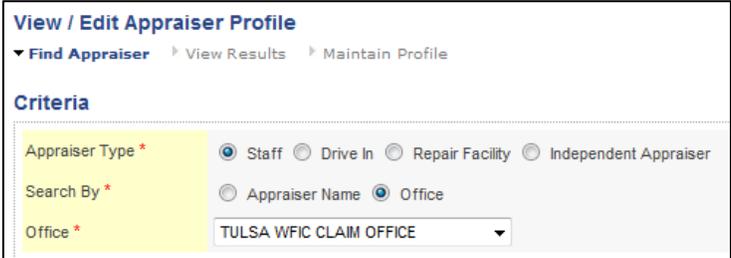
- Vehicle Location
 - Vehicle Owner
 - Appraiser Location (RF)
-



Updating Territories

How to Batch Update Territories for Staff / Independent Appraisers

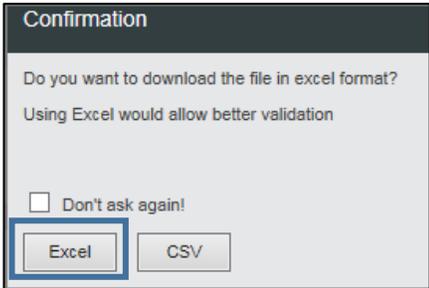
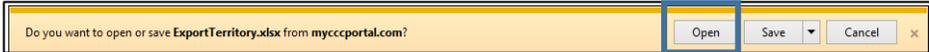
The following table outlines the steps necessary to do a batch update of territories:

Step	Action
1	<p>Click the Maintain Appraisal Profile link from the CCC Portal Home Page.</p> 
2	<p>Conduct a Find Appraiser search by selecting the following:</p> <ul style="list-style-type: none"> • Appraiser Type • Search By Criteria 
3	<p>Click the Search button.</p>
4	<p>Click the export territory link. Note: This action is available for a single Staff or Independent Appraiser.</p> 

Continued on next page



Updating Territories, Continued

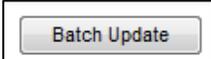
How to Batch Update Territories for Staff / Independent Appraisers, continued																																									
Step	Action																																								
5	<p>A pop-up message asks you to select the file type. Note: It is recommended that you select Microsoft Excel for the file download.</p> 																																								
6	<p>Click Open on the File Download pop-up window.</p> 																																								
7	<p>A Microsoft Excel file opens.</p> <table border="1" data-bbox="326 1113 1166 1270"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> <th>E</th> <th>F</th> <th>G</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Lastname</td> <td>Firstname</td> <td>DLCUSTID</td> <td>From Postal Code</td> <td>To Postalcode</td> <td>Indicator</td> <td>Action</td> </tr> <tr> <td>2</td> <td>REINSPEC</td> <td>FLORIDA</td> <td>4.16E+08</td> <td>14000</td> <td>15000</td> <td>1</td> <td>ADD</td> </tr> <tr> <td>3</td> <td>REINSPEC</td> <td>FLORIDA</td> <td>4.16E+08</td> <td>15010</td> <td>15200</td> <td>1</td> <td>ADD</td> </tr> <tr> <td>4</td> <td>REINSPEC</td> <td>FLORIDA</td> <td>4.16E+08</td> <td>18000</td> <td>19000</td> <td>1</td> <td>ADD</td> </tr> </tbody> </table>		A	B	C	D	E	F	G	1	Lastname	Firstname	DLCUSTID	From Postal Code	To Postalcode	Indicator	Action	2	REINSPEC	FLORIDA	4.16E+08	14000	15000	1	ADD	3	REINSPEC	FLORIDA	4.16E+08	15010	15200	1	ADD	4	REINSPEC	FLORIDA	4.16E+08	18000	19000	1	ADD
	A	B	C	D	E	F	G																																		
1	Lastname	Firstname	DLCUSTID	From Postal Code	To Postalcode	Indicator	Action																																		
2	REINSPEC	FLORIDA	4.16E+08	14000	15000	1	ADD																																		
3	REINSPEC	FLORIDA	4.16E+08	15010	15200	1	ADD																																		
4	REINSPEC	FLORIDA	4.16E+08	18000	19000	1	ADD																																		
8	<p>The file displays in the following format:</p> <ul style="list-style-type: none"> • Lastname • Firstname • DLCUSCTID • From Postal Code • To Postal Code • Indicator • Action 																																								

Continued on next page



Updating Territories, Continued

How to Batch Update Territories for Staff / Independent Appraisers, continued

Step	Action
9	<p>Make changes to the spreadsheet to prepare for the Batch Update.</p> <p>Enter Postal Code Ranges Add Indicator of 1 (Primary), 2 (Secondary) or 3 (Tertiary)</p> <p>Copy the LOGON, Lastname and Action to all rows with postal codes. Note: Firstname is optional in this spreadsheet.</p>
10	Once you have completed your spreadsheet, save the file as a Microsoft Excel file.
11	Click the [refresh] link and then the Find Appraisers link.
12	<p>Territory radio button is selected:</p>  <p>The screenshot shows a 'Batch Update' section with a 'File type' label. Below it, there are two radio buttons: 'Territory' (which is selected) and 'Attributes'. To the right of the radio buttons is a text input field with a 'Browse...' button next to it. The 'Browse...' button is highlighted with a blue border.</p>
13	Click the Browse button and find the file that you just saved.
14	<p>Click the Batch Update button.</p>  <p>The screenshot shows a single button labeled 'Batch Update'.</p>
15	A confirmation message displays. Note: If you want to export multiple sheets, it is recommended that you click the [refresh...] link in between exports.

Updating Territories, Continued

Adding Data If you want to add a few rows of data and remove a few rows of data, it is recommended that you complete the following steps outlined in the table below. **Note:** You can update multiple users on the same spreadsheet.

Step	Action
1	Export the file.
2	Change ADD to REMOVE for the zip codes you want to remove.
3	Append extra rows with ADD; you'll need to make sure you paste the LOGON and Lastname.
4	Leave all the other rows in the file with ADD as provided in the Export.
5	Click [refresh...] to clear the memory.
6	Return to the Maintain Appraiser page with the Batch Update module; Browse for the file and click the "Batch Update" button.

Changing Primary & Backup Territories If you want to change the primary and backup territories, it is recommended that you complete the following steps:

Step	Action
1	Export the file.
2	Change ADD to REMOVE for the ones you want to change from '1' to '2' (you may even want to re-sort by Action and/or Indicator to group them together)
3	Save the file with 'REMOVE' in the file name (you don't need to close the file)
4	Return to the Maintain Appraiser page with the Batch Update module; Click [refresh...] to clear the memory
5	Browse for the 'remove' file and click the "Batch Update" button
6	Click [refresh...]
7	Return to the file do a Ctrl-H to change the 1's to 2's and REMOVE to ADD
8	Save the file with 'ADD' in the file name
9	Return to the Maintain Appraiser page with the Batch Update module
10	Click [refresh...] to clear the memory
11	Browse for the 'add' file and click the "Batch Update" button

Continued on next page



Updating Territories, Continued

How to Batch Update Territories for Reinspectors

The following table outlines the steps necessary to do a batch update of territories for Reinspectors:

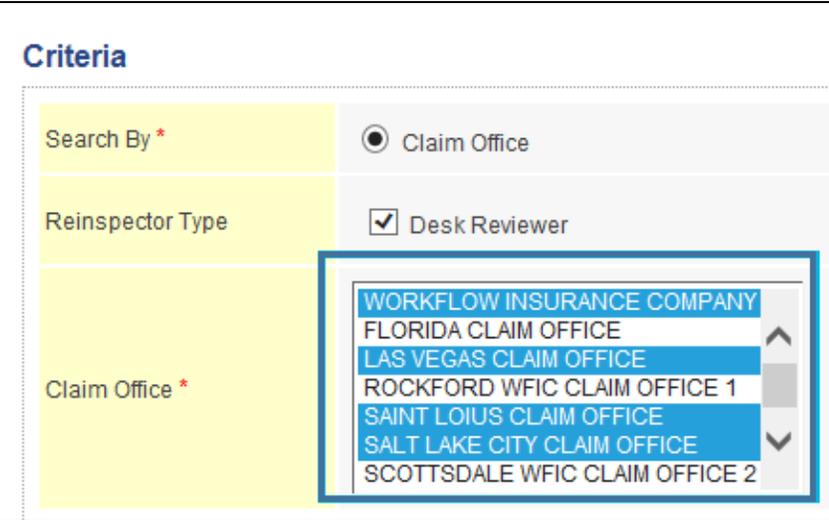
Step	Action
1	<p>From the CCC Portal Home Page, click the Maintain Reinspectors link.</p> 
2	<p>The Maintain Reinspectors page opens.</p> 
3	<p>Click the View / Edit Reinspector Profile link to make profile changes.</p> 

Continued on next page



Updating Territories, Continued

How to Batch Update Territories for Reinspectors, continued

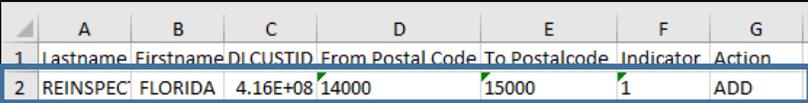
Step	Action
4	<p>Select a Search By criteria. You can select one of the following:</p> <ul style="list-style-type: none"> • Claim Office • Reinspection Supervisor • Reinspector Name  <p>If you select Claim Office or Reinspection Supervisor, you can further refine the search by selecting specific Reinspector Type (s). If you select Reinspector Name, you can enter the name with either Starts With or Contains.</p>
5	<p>Select one or more Claim Offices. Click on the claim office name and use the CTRL key to select additional claim offices.</p> 
6	Click the Search button.

Continued on next page



Updating Territories, Continued

How to Batch Update Territories for Reinspectors, continued

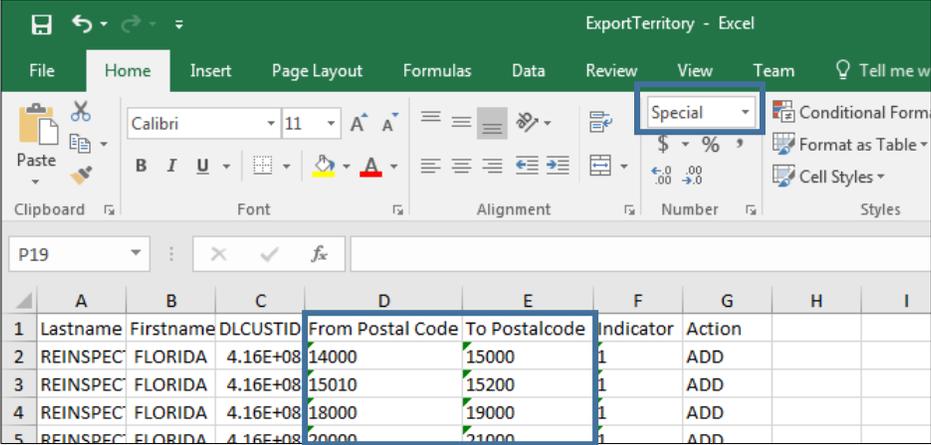
Step	Action																														
7	<p>The Search Results list displays.</p>  <p>The screenshot shows a web interface titled "Maintain Reinspector Profile" with a breadcrumb trail: "Find Reinspector > View Results > Maintain Profile". Below the breadcrumb is a "Results" section with a table. The table has columns: Reinspector, Claim Office, Coverage, Potal Type, and Actions. The data rows are:</p> <table border="1"> <thead> <tr> <th>Reinspector</th> <th>Claim Office</th> <th>Coverage</th> <th>Potal Type</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>APPROVE, OTTO</td> <td>WORKFLOW INSURANCE COMPANY</td> <td></td> <td>Reinspector</td> <td>maintain profile export territory</td> </tr> <tr> <td>DESKREVIEWERONE, SALT</td> <td>SALT LAKE CITY CLAIM OFFICE</td> <td>20000-25000(1)</td> <td>Desk Reviewer</td> <td>maintain profile export territory</td> </tr> <tr> <td>DESKREVIEWERONE, SALT</td> <td>SALT LAKE CITY CLAIM OFFICE</td> <td>20000-25000(1)</td> <td>Field Reinspector</td> <td>maintain profile export territory</td> </tr> <tr> <td>DESKREVIEWERTWO, SALT</td> <td>SALT LAKE CITY CLAIM OFFICE</td> <td></td> <td>Desk Reviewer</td> <td>maintain profile export territory</td> </tr> <tr> <td>REINSPECTORONE, SALT</td> <td>SALT LAKE CITY CLAIM OFFICE</td> <td>00001-00004(1), 20000-25000(1), 60000-75000(1)</td> <td>Field Reinspector</td> <td>maintain profile export territory</td> </tr> </tbody> </table>	Reinspector	Claim Office	Coverage	Potal Type	Actions	APPROVE, OTTO	WORKFLOW INSURANCE COMPANY		Reinspector	maintain profile export territory	DESKREVIEWERONE, SALT	SALT LAKE CITY CLAIM OFFICE	20000-25000(1)	Desk Reviewer	maintain profile export territory	DESKREVIEWERONE, SALT	SALT LAKE CITY CLAIM OFFICE	20000-25000(1)	Field Reinspector	maintain profile export territory	DESKREVIEWERTWO, SALT	SALT LAKE CITY CLAIM OFFICE		Desk Reviewer	maintain profile export territory	REINSPECTORONE, SALT	SALT LAKE CITY CLAIM OFFICE	00001-00004(1), 20000-25000(1), 60000-75000(1)	Field Reinspector	maintain profile export territory
Reinspector	Claim Office	Coverage	Potal Type	Actions																											
APPROVE, OTTO	WORKFLOW INSURANCE COMPANY		Reinspector	maintain profile export territory																											
DESKREVIEWERONE, SALT	SALT LAKE CITY CLAIM OFFICE	20000-25000(1)	Desk Reviewer	maintain profile export territory																											
DESKREVIEWERONE, SALT	SALT LAKE CITY CLAIM OFFICE	20000-25000(1)	Field Reinspector	maintain profile export territory																											
DESKREVIEWERTWO, SALT	SALT LAKE CITY CLAIM OFFICE		Desk Reviewer	maintain profile export territory																											
REINSPECTORONE, SALT	SALT LAKE CITY CLAIM OFFICE	00001-00004(1), 20000-25000(1), 60000-75000(1)	Field Reinspector	maintain profile export territory																											
8	<p>Click the Export Territory link to export territory coverage that the user is active for Reinspection Routing.</p>  <p>The screenshot shows a yellow "Actions" menu with two options: "maintain profile" and "export territory". The "export territory" option is highlighted with a blue border.</p>																														
9	<p>A Microsoft Excel file is created and a message displays at the bottom of the page. Click to open the file.</p>  <p>The screenshot shows a yellow dialog box with the text: "Do you want to open or save ExportTerritory.xlsx from mycccportal.com?". There are three buttons: "Open", "Save", and "Cancel". The "Open" button is highlighted with a blue border.</p>																														
10	 <p>The screenshot shows an Excel spreadsheet with the following data:</p> <table border="1"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> <th>E</th> <th>F</th> <th>G</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Lastname</td> <td>Firstname</td> <td>DI</td> <td>CUSTID</td> <td>From</td> <td>Postal Code</td> <td>To</td> <td>Postalcode</td> <td>Indicator</td> <td>Action</td> </tr> <tr> <td>2</td> <td>REINSPEC</td> <td>FLORIDA</td> <td>4.16E+08</td> <td>14000</td> <td></td> <td>15000</td> <td></td> <td></td> <td>1</td> <td>ADD</td> </tr> </tbody> </table>		A	B	C	D	E	F	G	1	Lastname	Firstname	DI	CUSTID	From	Postal Code	To	Postalcode	Indicator	Action	2	REINSPEC	FLORIDA	4.16E+08	14000		15000			1	ADD
	A	B	C	D	E	F	G																								
1	Lastname	Firstname	DI	CUSTID	From	Postal Code	To	Postalcode	Indicator	Action																					
2	REINSPEC	FLORIDA	4.16E+08	14000		15000			1	ADD																					

Continued on next page



Updating Territories, Continued

How to Batch Update Territories for Reinspectors, continued

Step	Action																																
11	<p>The file displays in the following format:</p> <ul style="list-style-type: none"> • Lastname • Firstname • DLCUSCTID • From Postal Code • To Postal Code • Indicator <p>Action</p>																																
12	<p>Make changes to the spreadsheet to prepare for the Batch Update.</p> <ul style="list-style-type: none"> • Enter Postal Code Ranges Note: For single postal codes, enter the value in both the <i>From</i> and <i>To</i> fields. <p>For these fields, the format must be Special.</p>  <p>• Add Indicator of 1 (Primary), 2 (Secondary) or 3 (Tertiary)</p> <p>Copy the DLCUSCTID and Action to all rows with postal codes. Firstname and Lastname are optional in this spreadsheet. The updated spreadsheet should resemble the one shown below.</p> <table border="1" data-bbox="350 1619 1281 1766"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> <th>E</th> <th>F</th> <th>G</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Lastname</td> <td>Firstname</td> <td>DLCUSTID</td> <td>From Postal Code</td> <td>To Postalcode</td> <td>Indicator</td> <td>Action</td> </tr> <tr> <td>2</td> <td>REINSPEC</td> <td>FLORIDA</td> <td>4.16E+08</td> <td>14000</td> <td>15000</td> <td>1</td> <td>ADD</td> </tr> <tr> <td>3</td> <td>REINSPEC</td> <td>FLORIDA</td> <td>4.16E+08</td> <td>15010</td> <td>15200</td> <td>1</td> <td>ADD</td> </tr> </tbody> </table>		A	B	C	D	E	F	G	1	Lastname	Firstname	DLCUSTID	From Postal Code	To Postalcode	Indicator	Action	2	REINSPEC	FLORIDA	4.16E+08	14000	15000	1	ADD	3	REINSPEC	FLORIDA	4.16E+08	15010	15200	1	ADD
	A	B	C	D	E	F	G																										
1	Lastname	Firstname	DLCUSTID	From Postal Code	To Postalcode	Indicator	Action																										
2	REINSPEC	FLORIDA	4.16E+08	14000	15000	1	ADD																										
3	REINSPEC	FLORIDA	4.16E+08	15010	15200	1	ADD																										

Continued on next page



Updating Territories, Continued

How to Batch Update Territories for Reinspectors, continued

Step	Action
13	Once you have completed your spreadsheet, save the file as a Microsoft Excel file.
14	Click the [refresh...] link. 
15	Under Batch Update, click the Browse button to locate/select the Microsoft Excel file. 
16	Click the Batch Update button. Note: A success message displays once the files are successfully entered.
17	Click the [refresh...] link to complete this process.

