Total Shop Management User Manual

eDirectGlass Total Shop Management

by AMJ Logistics, Inc.

eDirectGlass Total Shop Management User Manual

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Special thanks to:

All the people who contributed to the development of this great system. In addition, to all of those who put up with revision after revision of this manual.

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Many Claims - One Solution

It's Everything You Need!

The Freedom to...

* Manage your operations; anytime-anywhere!
* Eliminate EDI confusion and transaction payments.
* Direct Bill with confidence.
* Take Back Control!

More than a POS system, eDirectGlass is a Total Shop Management system that allows you to get more from your business. eDirectGlass reduces double-entry, automates cost authorization, and streamlines work production.

With eDirectGlass, you can focus on the things that matter the most to your business; like reducing day-to-day business costs, increasing productivity and greater billing flexibility, just to name a few.

Because the Right Tools Make All the Difference.

Part 1

1 Getting Started

1.1 Introduction

eDirectGlass™ is an evolutionary way of doing business for the entire automotive glass repair and replacement (AGRR) industry. eDirectGlass was designed to give the industry fair access to billing and claims data using proven patented Internet technologies.

eDirectGlass Benefits

- eDirectGlass eliminates the costs and hassle of working through multiple vendors such as POS and Claims networks. With eDirectGlass there is now a direct route between shops, vendors and insurance companies. You no longer have to pay for or share your information with multiple parties. You are in control of your own network!
- Integrated POS, Management and FNOL system. Stop paying for and using multiple services. With eDirectGlass™, you have all of the tools to manage your business in one place.
- Through the use of MultiLogic technology, eDirectGlass automatically analyzes all claims and invoices to ensure they are formatted correctly. This process allows the work and payment process to be greatly accelerated.
- eDirectGlass can work with non-electronic vendors! When you submit invoices to eDirectGlass, you can mark non-electronic vendors and we'll make sure it gets to the right place. You will receive electronic notification that the vendor has received the invoice from eDirectGlass.
- **AND MORE!** eDirectGlass is the only independent billing and management system. eDirectGlass is built on proven technology and is easy to use. We guarantee that eDirectGlass dramatically reduces the costs and time for glass replacement claims. Built on open standards, eDirectGlass is the first billing and management system that conforms to CIECA, EDI and other industry and computing standards.

Everything you will need to know about configuring and using eDirectGlass is in this guide. This manual will help you better understand the features and benefits of eDirectGlass. It will explain how to correctly setup eDirectGlass, create and work with jobs and assignments and communicate with your business partners.

This manual should answer any questions you may have and explain, in detail, all of the capabilities, features and benefits of the software.

1.2 System Requirements

This section discusses the hardware and software components your computer needs in order to run eDirectGlass. The components described are the minimum items necessary. eDirectGlass may run more efficiently with a faster processor, more memory and a broadband Internet connection, but in order to use our system your computer and network must meet the minimum system requirements:

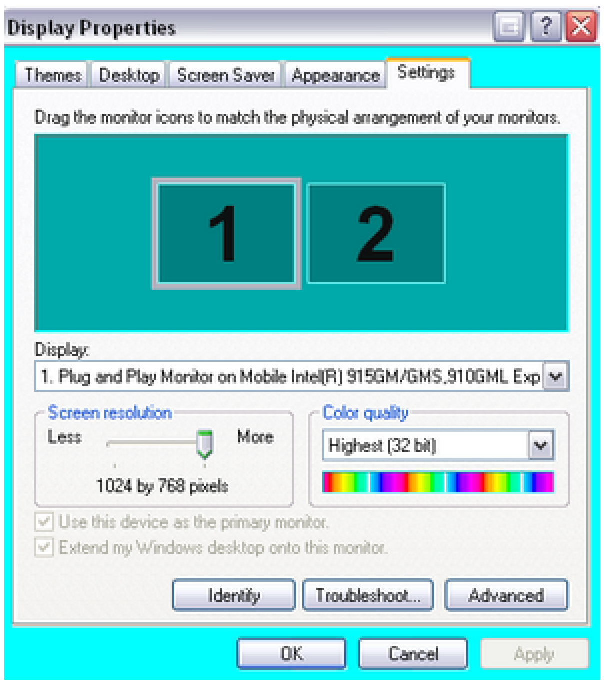
- Intel or AMD PC Computer.
- 1GB of RAM or greater.
- Windows XP, Windows Vista or Windows 7.
- Microsoft Internet Explorer 8 or greater (32 bit version only). **(Netscape, Mozilla/Firefox and Beta Versions of IE Are Not Supported). We only support Internet Explorer.**
- 128k DSL Internet Connection (**High-speed broadband connection recommended)**

- Inkjet or Laser Printer.
- Valid email address for order inquiry and confirmation.

1.3 Screen Settings

To ensure the best possible screen display of eDirectGlass TSM you will need to check and adjust your computer screen settings.

Screen Resolution: From your Desktop, right mouse click on any blank area of the screen and select **Properties** from the menu. Go to the **Settings** tab and change or adjust the screen resolution. Increasing the resolution will improve the screen view. Each system is different; your system's maximum resolution by differ from the example shown below. **The minimum resolution setting is 800 by 600, but we recommend 1024 by 768 for the best experience.**

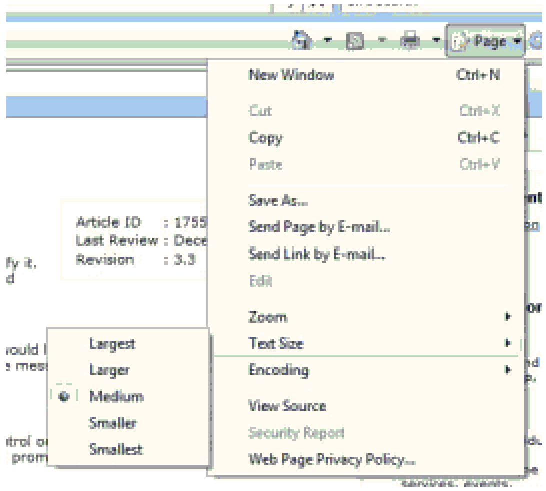


Display Properties Screen

1.4 Text Size

You should also double check the viewing text size for your Internet browser. With Internet Explorer opened, go to the menu bar and select **Page**. From the Page sub menu, select **Text Size**, and then select **Medium**.

***NOTE - THIS MAY DIFFER IN INTERNET EXPLORER 8 AND BELOW.**

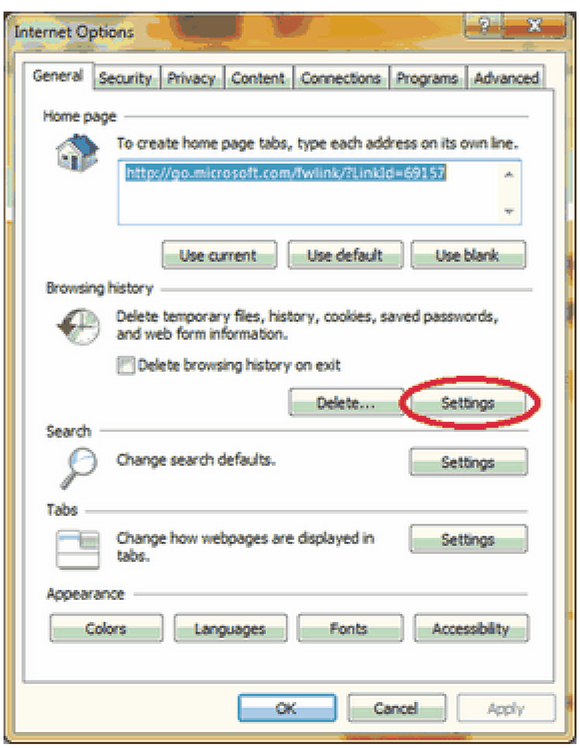


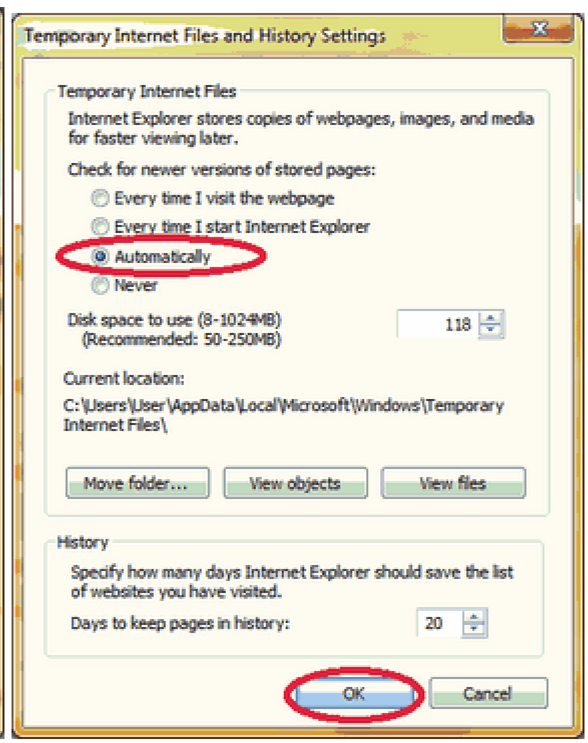
Text Size Selection Screen

1.5 Security Settings

In order to use certain features in our website, you must add security settings.

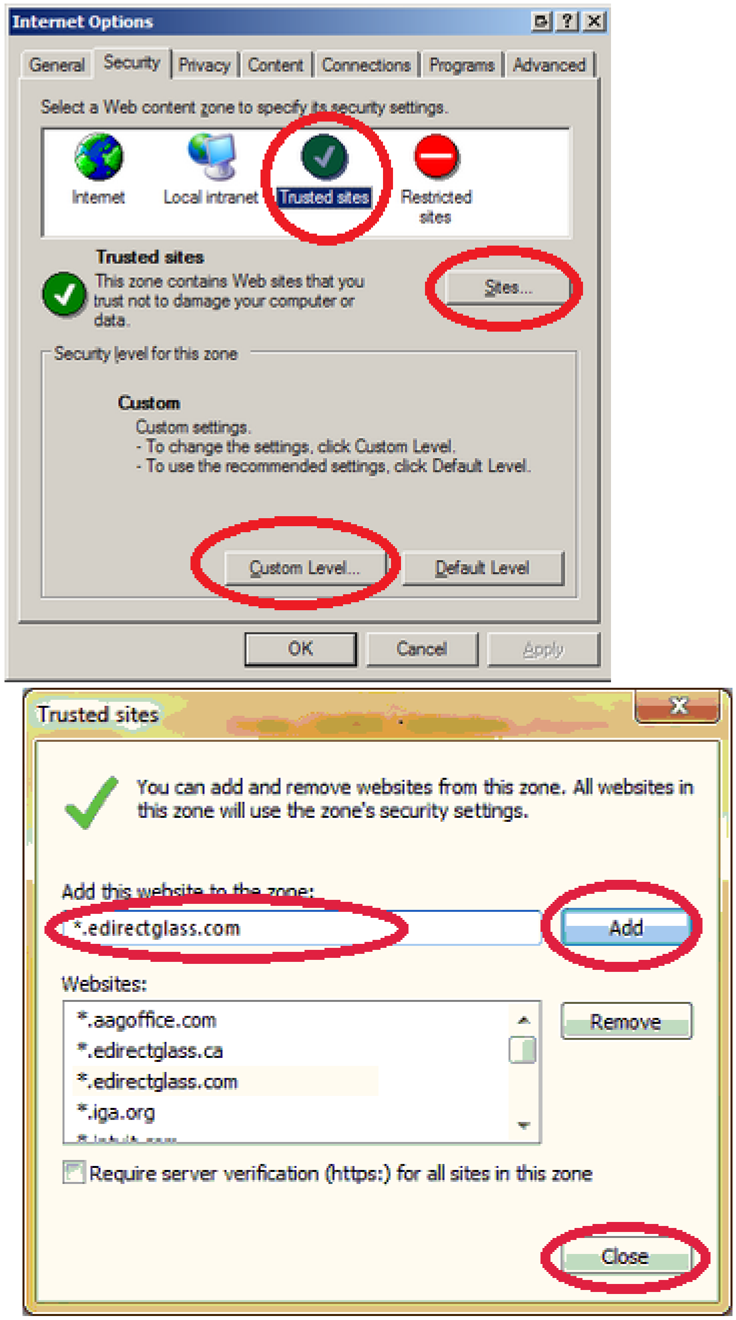
1. Open a new Internet Explorer browser window. Go to Tools - Internet Options.
2. In the 'General Tab' click on the 'Settings' button under the 'Browsing history' section.
3. In the "Temporary Internet Files and History Settings' window, make sure that 'Automatically' is selected and click on the OK button.





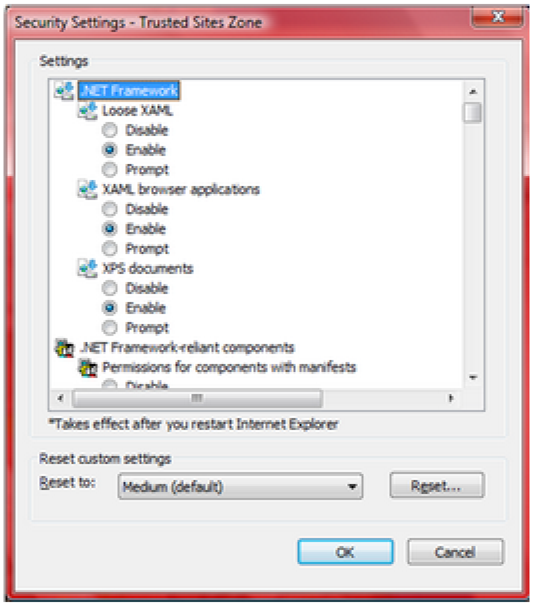
4. In the Internet Options Panel, Select the 'Security' tab.

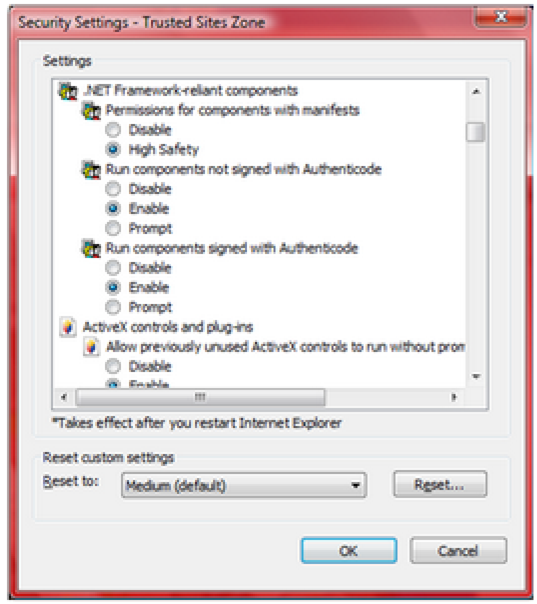
5. Click on Trusted sites then Sites. In the "Add this website to the zone:" box, type in *.edirectglass.com and make sure the "Require server verification (https:) for all sites in this zone" is not checked and click Add. Then type in https://live.edirectglass.com and click Add. Click Close. NOTE: You may be given a separate URL to use to access your version of eDirectGlass. Make sure you also add that URL to your Trusted sites list in addition to the ones listed above.

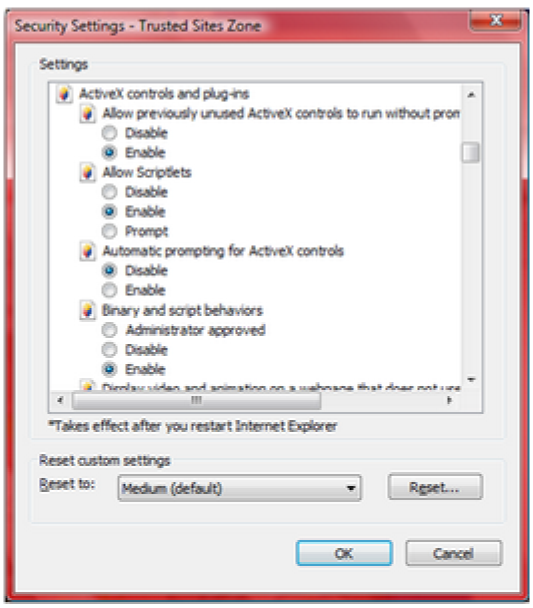


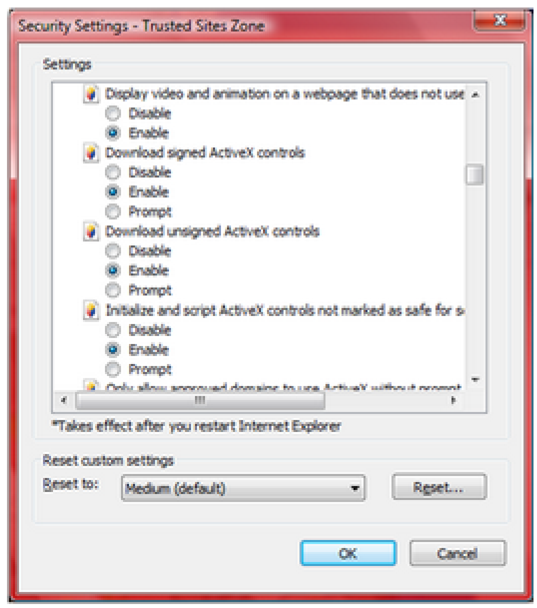
Security Settings

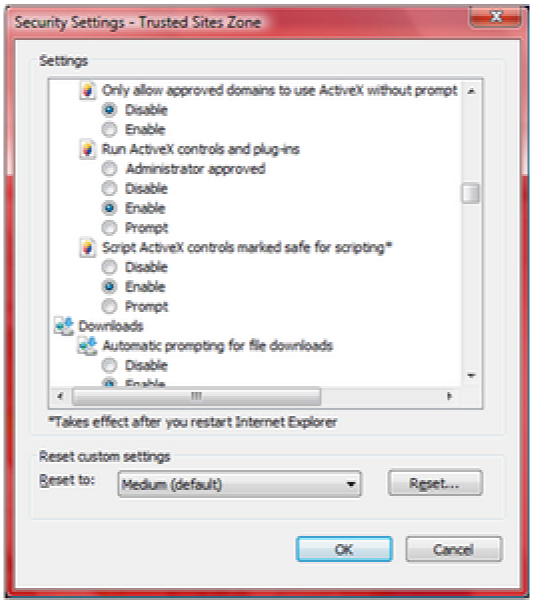
4. Still on the Security tab and on Trusted Sites, click on Custom Level...set all of the items as described below. Once all of the items have been set, close All IE windows. Open a brand new one and log back into eDirectGlass.

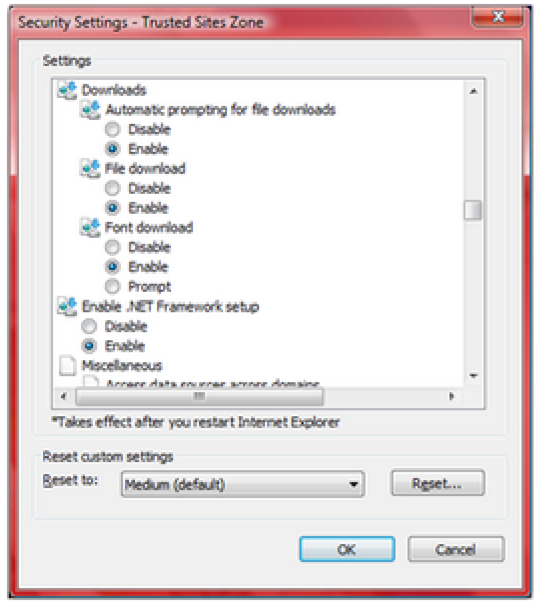


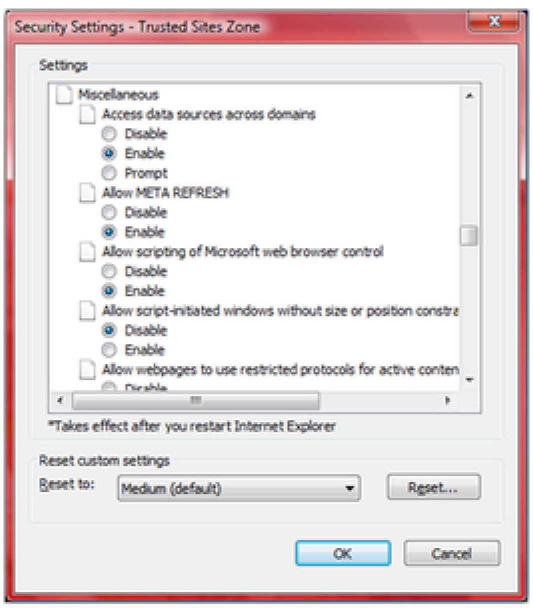


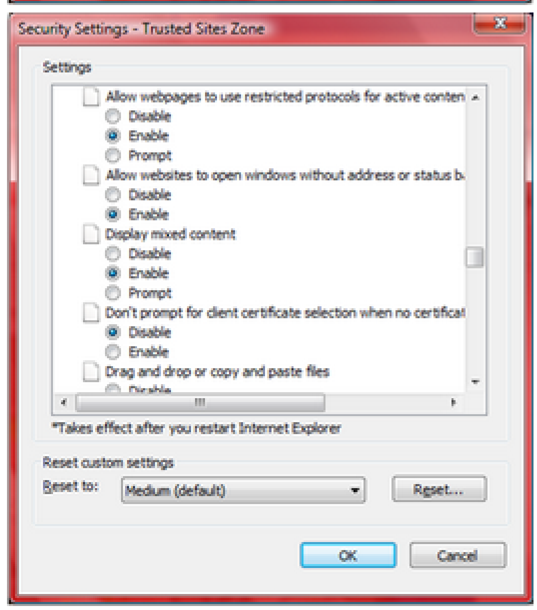


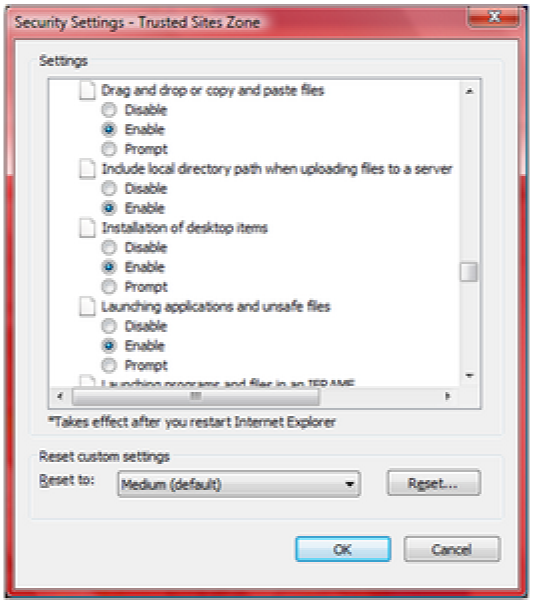


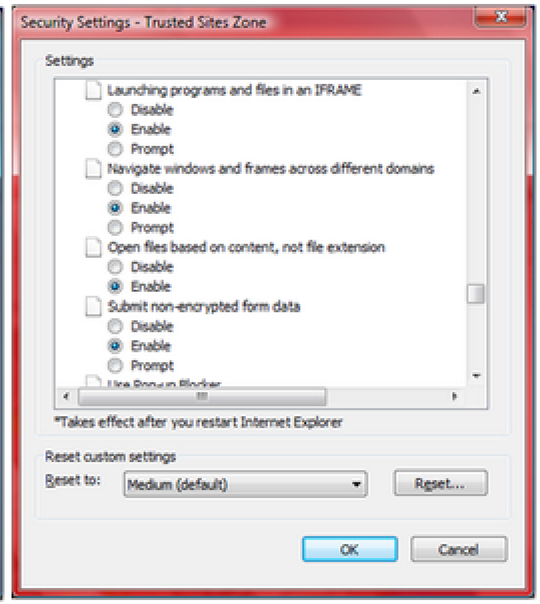

Security Settings - Trusted Sites Zone
Settings
Only allow approved domains to use ActiveX without prompt
Disable
Enable
Run ActiveX controls and plug-ins
Administrator approved
Disable
Enable
Prompt
Script ActiveX controls marked safe for scripting*
Disable
Enable
Prompt
Downloads
Automatic prompting for file downloads
Disable
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel

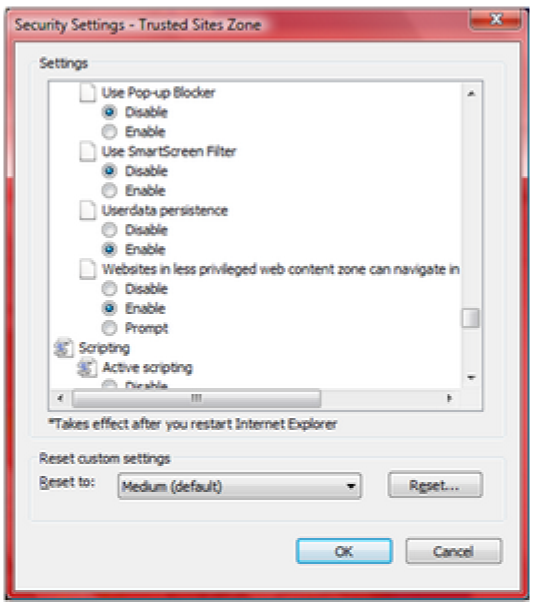

Security Settings - Trusted Sites Zone
Settings
Downloads
Automatic prompting for file downloads
Disable
Enable
File download
Disable
Enable
Font download
Disable
Enable
Prompt
Enable .NET Framework setup
Disable
Enable
Miscellaneous
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel

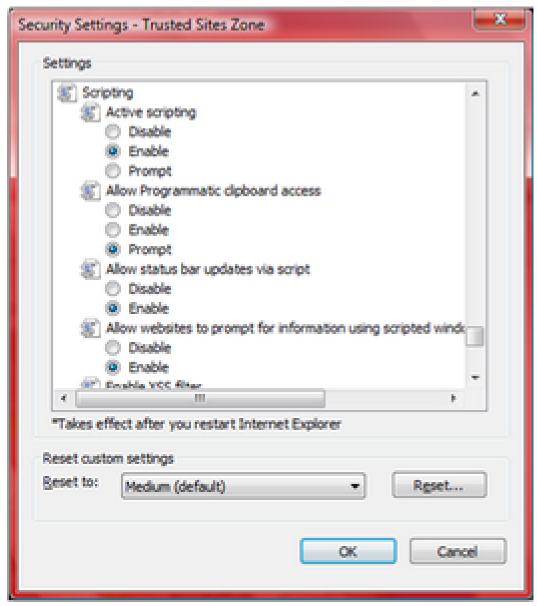

Security Settings - Trusted Sites Zone
Settings
Miscellaneous
Access data sources across domains
Disable
Enable
Prompt
Allow META REFRESH
Disable
Enable
Allow scripting of Microsoft web browser control
Disable
Enable
Allow script-initiated windows without size or position constra
Disable
Enable
Allow webpages to use restricted protocols for active conten
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel

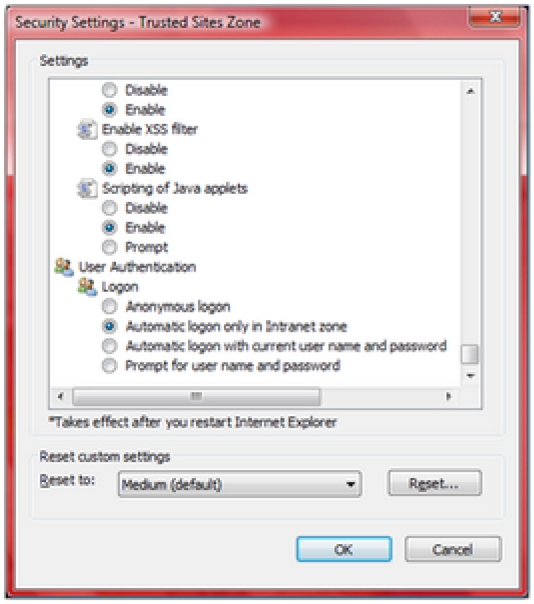

Security Settings - Trusted Sites Zone
Settings
Allow webpages to use restricted protocols for active conten
Disable
Enable
Prompt
Allow websites to open windows without address or status b
Disable
Enable
Display mixed content
Disable
Enable
Prompt
Don't prompt for client certificate selection when no certificat
Disable
Enable
Drag and drop or copy and paste files
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel


Security Settings - Trusted Sites Zone
Settings
Drag and drop or copy and paste files
Disable
Enable
Prompt
Include local directory path when uploading files to a server
Disable
Enable
Installation of desktop items
Disable
Enable
Prompt
Launching applications and unsafe files
Disable
Enable
Prompt
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel


Security Settings - Trusted Sites Zone
Settings
Launching programs and files in an IFRAME
Disable
Enable
Prompt
Navigate windows and frames across different domains
Disable
Enable
Prompt
Open files based on content, not file extension
Disable
Enable
Submit non-encrypted form data
Disable
Enable
Prompt
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel

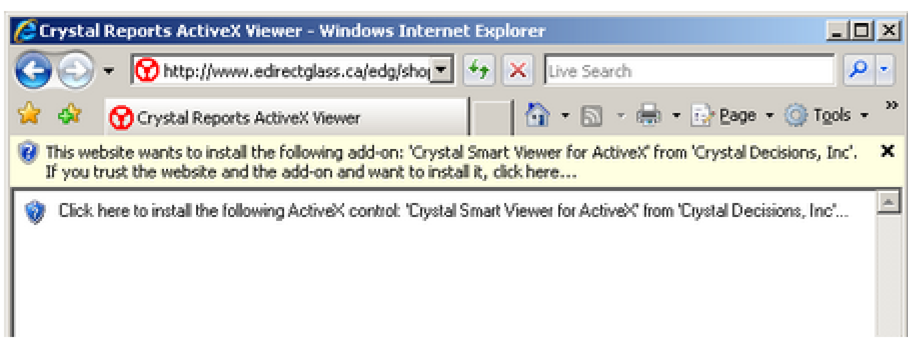

Security Settings - Trusted Sites Zone
Settings
Use Pop-up Blocker
Disable
Enable
Use SmartScreen Filter
Disable
Enable
Userdata persistence
Disable
Enable
Websites in less privileged web content zone can navigate in
Disable
Enable
Prompt
Scripting
Active scripting
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel


Security Settings - Trusted Sites Zone
Settings
Scripting
Active scripting
Disable
Enable
Prompt
Allow Programmatic clipboard access
Disable
Enable
Prompt
Allow status bar updates via script
Disable
Enable
Disable
Enable
*Takes effect after you restart Internet Explorer
Reset custom settings
Reset to:
Medium (default)
Reset...
OK
Cancel



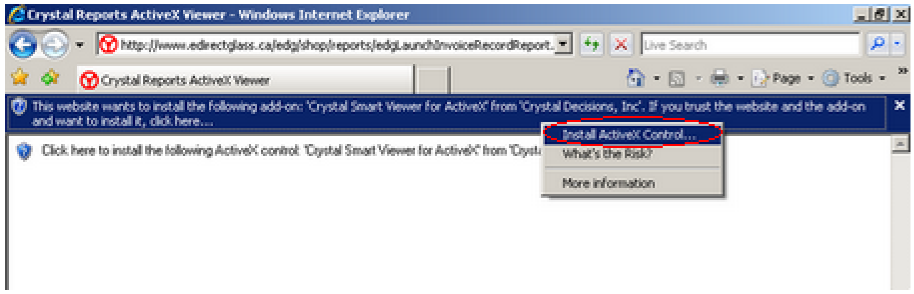
1.6 Installing Crystal Report Viewer

In order to be able to print from eDirectGlass, you must first install the Crystal Report Viewer from either a Quote or an Invoice (never a Work Order or Report). IMPORTANT NOTE: You must first set your Internet Explorer setting correctly before trying to install the Crystal Report Viewer. (See *Security Settings*). When you first click on either the Print Quote or Print Invoice buttons in eDirectGlass, it will prompt you to install the 'Crystal Smart Viewer for ActiveX'.



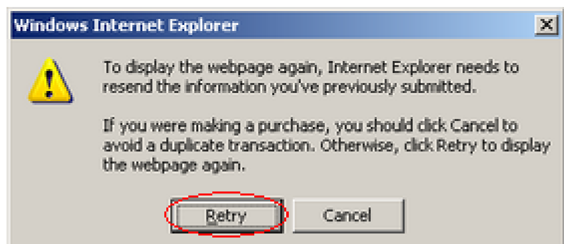
Crystal Report ActiveX Viewer

1. Click on the yellow highlighted area and a drop-down menu will appear.
2. Click on the "Install ActiveX Control" in the drop-down.



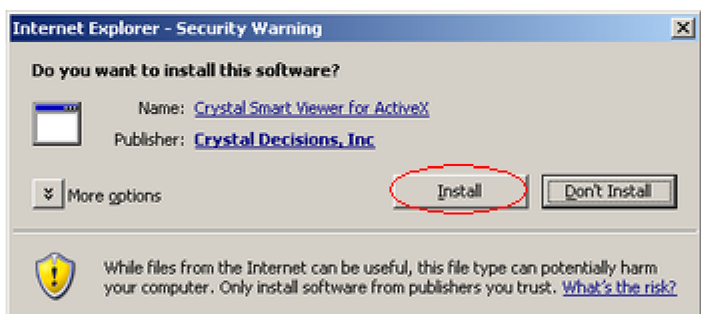
Install ActiveX Control

3. A pop-up box may appear asking you to display the webpage again. Click on Retry to refresh the page.



Retry Box

4. Another pop-up box will appear asking you if you want to install the viewer. Click on the Install button to begin the installation process.



Install ActiveX Box

1.7 Installing DBPIX Attachment Plug-In

NOTE: Before you can use the Attachment feature in eDirectGlass, you must first configure your computer and Internet Explorer.

1. When you first click on the Add Attachment button, a new browser window will appear asking you to install the 'dbpix20.ocx' plug-in.
2. Click on the yellow highlighted area and a drop-down box will appear. Select 'Install ActiveX Control...'

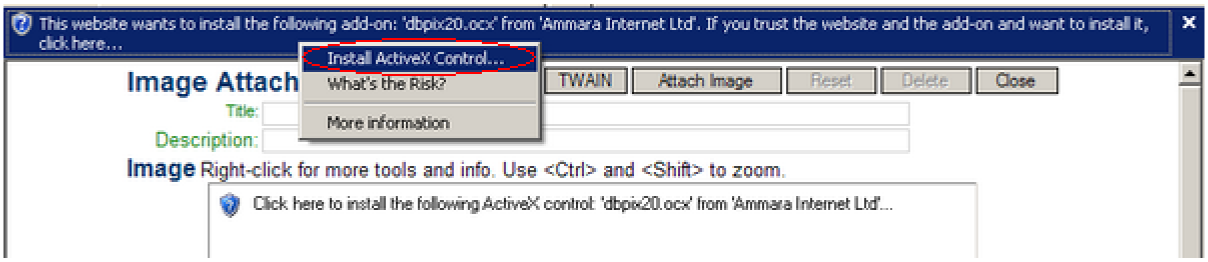
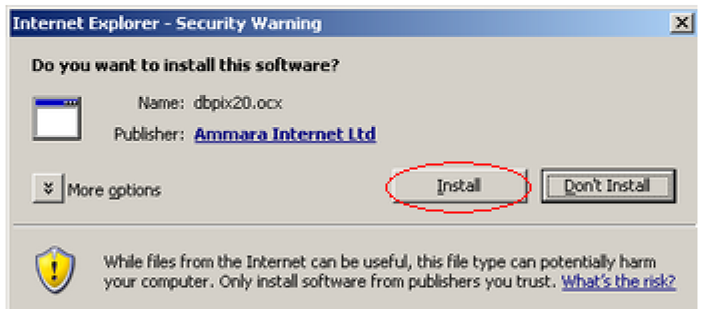


Image Attachment ActiveX

3. A pop-up box will come up asking you if you want to install the software. Click on the Install button to being the installation process.



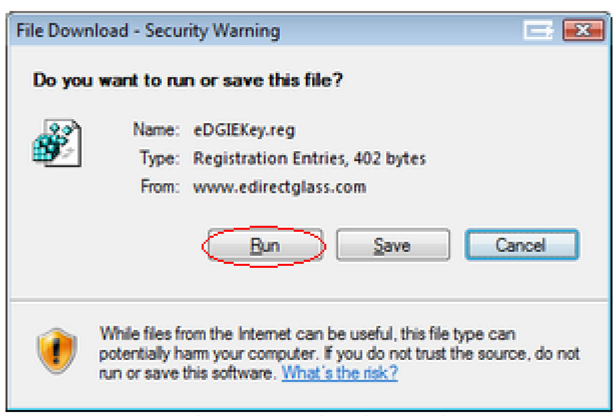
Install ActiveX Box

4. When the installation is complete, you will see the Image Attachment interface screen.

1.8 Configure the Registry of Attachments

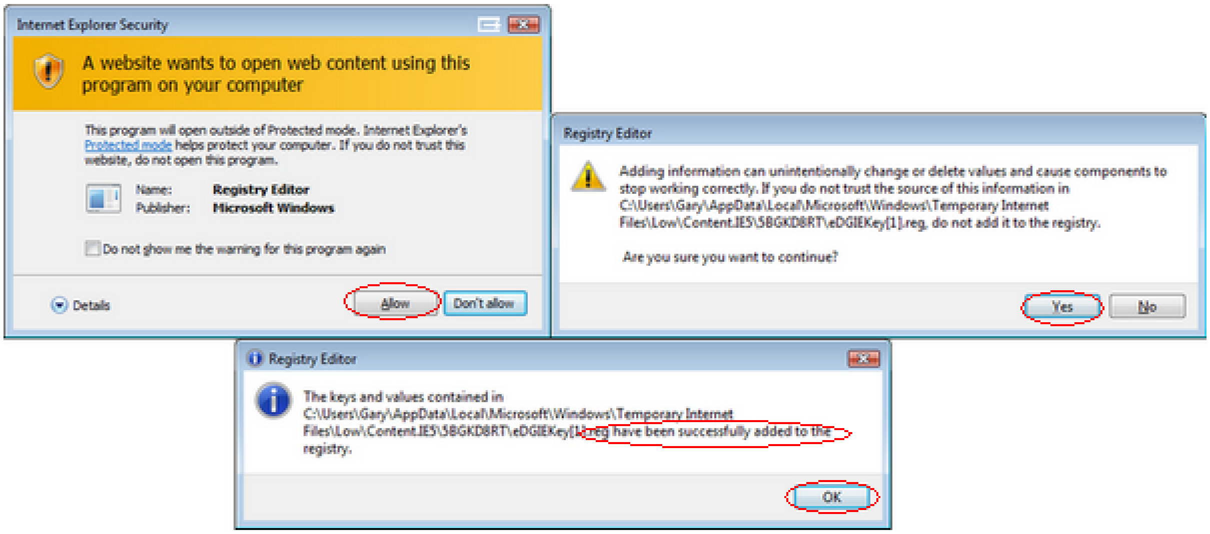
1. Download the following file and when prompted, choose 'Run':

http://www.edirectglass.com/downloads/eDGIEKey.reg



Registry Download Warning

2. Your system may prompt you to allow the update to the registry to occur. Click 'Allow', 'Yes', or 'OK' to any of these prompts until you get a message telling you that the update took place.



Security Warnings

3. Open up Internet Explorer and you can begin using the Attachments feature.

1.9 Connecting to eDirectGlass

Before you can connect to eDirectGlass, you must first complete the following steps:

1. Connect to the Internet (Not required for broadband or LAN Internet services).
2. Launch Internet Explorer. **NOTE: eDirectGlass only supports Internet Explorer.**
3. Have your Account Login Information as delivered to you by eDirectGlass via Email, Fax or Mail.

Once you have completed these three steps, you may proceed to the eDirectGlass website to login.

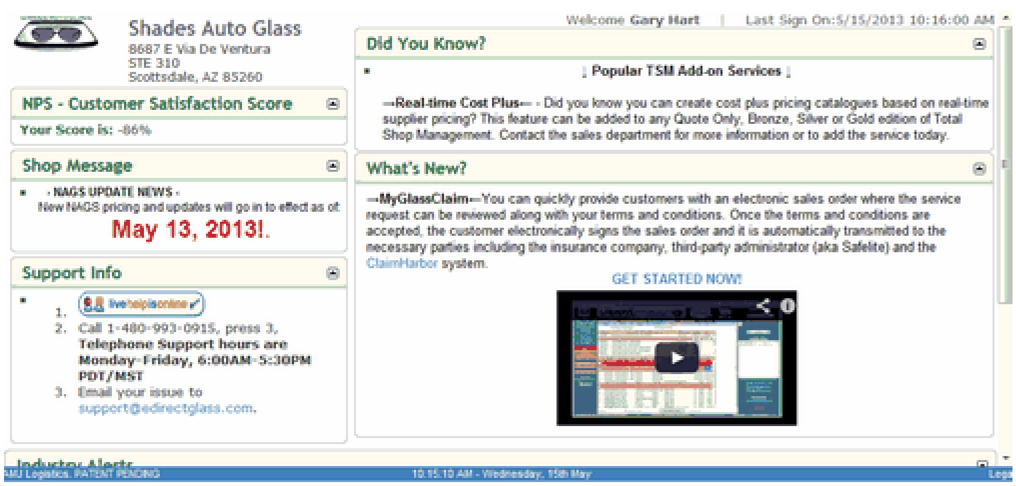
1.9.1 Login

In order to connect to your eDirectGlass account, you must first login.

1. In the address bar of Internet Explorer, type the following URL: https://live.edirectglass.com ***or the web address given to you by eDirectGlass or your eDirectGlass Administrator***.
2. Once the address has been entered, the login screen should be visible.

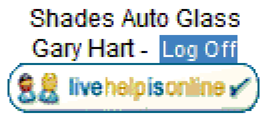
Portion of Login Screen

3. In the 'User Name' box, enter the username that has been provided to you by eDirectGlass or your eDirectGlass Administrator.
4. In the 'Password' box, enter the password that has been provided to you by eDirectGlass or your eDirectGlass Administrator.
5. Click on the Login button to login to your eDirectGlass account.
6. When you first login to eDirectGlass, you will notice a box in the middle of the screen with rotating messages. Please take a few moments to read these messages and check back often for important information. You will notice that the top section on this information board lists your NPS - Customer Satisfaction Score. This is the total overall score for your company based on all answers to your NPS question. *See eDirectGlass Administration - Customer Satisfaction for more information on this feature.*



1.9.2 Log Off

To Log Off of the eDirectGlass system or to login under a different username, click on the Log Off button next to the username in the upper right-hand corner of the screen. It is important to log out when you are done in eDirectGlass.



Log Off

1.10 eDirectGlass Administration

DO NOT SKIP THIS STEP

If this is the first time you have logged in to your eDirectGlass account, you must verify your shop information. If you fail to complete the Administration review and setup, you may jeopardize your ability to create, manage and submit invoices.

1.10.1 System Administration

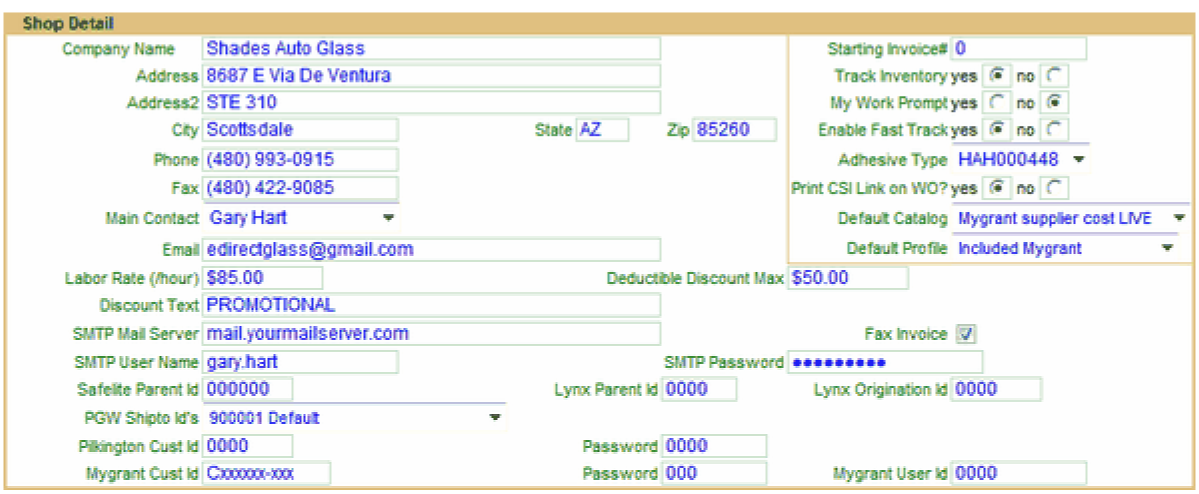
1. From the eDirectGlass Main Screen, click on the Administration button.
2. On the Administration Sub Menu, click on the System Admin button.
3. In the Shop Detail window, make sure that your company contact information and labor rate is correct. The email address you list will handle several different functions. This will be the email address that will be used as the "From" email address in sent emails when using the eMinder feature and in conjunction with the SMTP setup will be used for invoices emailed from within the eDirectGlass system. This is also the email address where bounced emails will be returned. If you wish to fax invoices directly from within eDirectGlass, this email address must also be the one you have associated with your existing eFax account and must be set up to allow you to send outbound faxes.
4. If you plan on allowing a deductible/promotional discount to be applied to the owner's portion of the invoice, you must fill out the maximum amount of a discount that you will allow your employees to give to a customer in the Deductible Discount Max field and the text you wish to appear on the customer's deductible invoice in the Discount Text . We recommend "PROMOTIONAL" as the Discount Text.

   NOTE: Even if you will not limit the amount of a discount your employees can give to a customer, you must enter an amount in this field. Just make it a large enough amount (e.g., $900) so there will be no restrictions.

5. The SMTP Mail Server, User Name & Password fields are your local email settings that will be used in conjunction with the eMinder Appointment Reminder feature of eDirectGlass and the invoice email feature. **Please Note: Certain email services such as Gmail, AOL, Hotmail, Yahoo or any SMTP server requiring a secure SMTP connection, ARE NOT COMPATIBLE. If you require a secure SMTP connection and cannot locate a non-secure method to dispatch email, you can upgrade your eMinder add-on for an additional monthly fee.**
6. In order to use the Fax Invoice feature, you must already have an existing outbound eFax account. The email address you have entered above must be an approved outbound eFax email address.
7. **The Safelite Parent Id is a six (6) digit number that begins with a 09 and can be gotten from your Safelite representative.** It is required in order to be able to submit invoices electronically to Safelite. Once you have that number, highlight the Safelite Parent Id field, hit the backspace button and type in your six digit number and Save.
8. The Lynx Parent Id and Lynx Origination Id are fields that eDirectGlass will fill in if needed for Lynx PowerSync Assignments. You do not need to enter any information in these fields to send outbound electronic invoice to Lynx.
9. The PGW Shipto Id's drop down list will only be populated once your PGW information is set up in

the eDirectGlass system. To have your PGW pricing and availability show in eDirectGlass, please contact your eDirectGlass representative with your list of PGW Ship To numbers and indicate which is your default location.

10. The Pilkington Cust Id and Password can be used to allow the eDirectGlass system to use your Pilkington information to access and display for you the current price and on hand quantity from your Pilkington warehouse directly in your eDirectGlass account. **NOTE: Your Pilkington account must be set up with your Pilkington rep for ePOS**. The ePOS Cust Id and Password are the ones that you will need.
11. Mygrant Cust Id, Password and Mygrant User Id can be used to allow the eDirectGlass system to use your Mygrant information to access and display for you the current price and on hand quantity from your Mygrant warehouse directly in your eDirectGlass account. NOTE: Mygrant Cust Id must be formatted as Cxxxxxx-xxx. Mygrant User Id and Password will be the same as you use to access your Mygrant account via the Mygrant website.
12. If you wish to maintain an internal invoice number, enter your Starting Invoice # in the appropriate box. The system will assign the next unused customer invoice number to each record as they are converted to a Work Order status or as they are created as a New Invoice. You will not be able to renumber these records and this number will not be submitted with the electronic invoice, it is an internal invoice number only.
13. Select Track Inventory if you wish to identify and track Parts Admin parts, inventory and current vendor prices within the eDirectGlass system. You must also have the Track Inventory set to yes if you wish to enter Part Notes that will be available during the parts selection process.
14. If the My Work Prompt is set to yes, the system will ask you each time you leave a record if you wish to save it to the My Work Panel. If My Work Prompt is set to No, it will automatically be saved to the My Work Panel without prompting you.
15. If you set Enable Fast Track to yes and then select the Adhesive Type from the drop down, when you select a glass part on a record, the system will automatically check the Adhesive Type you selected and if available, the Precision moulding. These items can be unchecked and alternates can be selected if needed on a per record basis.
16. Setting Print CSI Link on WO to yes, will print a message at the bottom of each Work Order asking your customer to visit the Your Feed Back Counts site, enter their Survey Code and respond to the Customer Satisfaction questions you have set up.
17. The selections you make for the Default Catalog and Default Profile will be what is automatically set when you are pricing a cash/bill to Owner record. A different catalog and/or pricing profile may be selected during that time if needed.



Shop Detail

18. In the next section, make sure you enter your tax ID and rate information. Please do not use a hyphen in the Federal Id number. Tax Rates do not require a % as it is understood (e.g., 7% should be entered as 7.00; not 7% and not .007). All amounts in the Parts columns will be added together to get your total tax rate. The same for the Labor column. If you pay 6.5% to one agency

and 2.9% to another, you can either enter them as 6.5 in Federal and 2.9 in State or you can just enter 9.4 in the Federal field. If you do not charge tax on Labor/Services simply leave these as 0. **Note: If you deal with multiple tax rates, see the *Multiple Tax IDs & Rates* section of this manual.**

	Tax Id	Tax Rate Parts	Tax Rate Labor
Federal	5488445454	0.000	0.000
State	State878099	0.000	0.000

Shop Detail - Tax ID and Rates

19. The next Shop Detail configuration is your hours and days of operation. This section will drive the Schedule tab of your Work Orders. If you are taking advantage of our Web Quoter and you wish to have the customer select a date and time frame for their service, simply leave the checkbox next to Do not allow Assignment prescheduling unchecked. If you do not want to participate in this feature, please check the ☑ Do not allow Assignment prescheduling checkbox.

    Note: The total Daily Job Capacity for all of your technicians *(see User Mgmt)* will be used by the system to calculate the Total Shop Capacity (you do not/should not enter anything into this field).

    a. Hourly Based Schedule - allows you to schedule your jobs based on the actual time it would take to complete the job (including driving time). The schedule screens for Hourly Based Scheduling are divided into 15 minute increments.
    b. AM/PM Based Schedule - takes the total of the Daily Job Capacity you have entered for all of your technicians, divides that number by two and gives you that number of AM slots and that number of PM slots (e.g., you have 4 Technicians each capable of doing 5 jobs a day giving you a total Daily Job Capacity of 20; the system will list 10 AM and 10 PM jobs for each day). When you have scheduled all of the available slots, the system will alert you that have reached your daily shop capacity. You may continue scheduling jobs on that day even if you have reached your stated capacity, this is merely an alert.

    NOTE: Once you determine which Schedule Type you will be using, you should not switch back to the other type to avoid scheduling conflicts and lost jobs. Also, if you wish to use our Web Quoter feature, your Schedule Type must be set to AM/PM.

Hours of Operation		Days of Operation	
Start time	8 AM	☑ Monday ☑ Tuesday ☑ Wednesday ☑ Thursday ☑ Friday	
End time	6 PM	☐ Saturday ☐ Sunday ☐ Do not allow Assignment prescheduling	
Schedule Type	Hourly Based Schedule: ○	AMPM Based Schedule: ◉	
		Total Shop Capacity	45

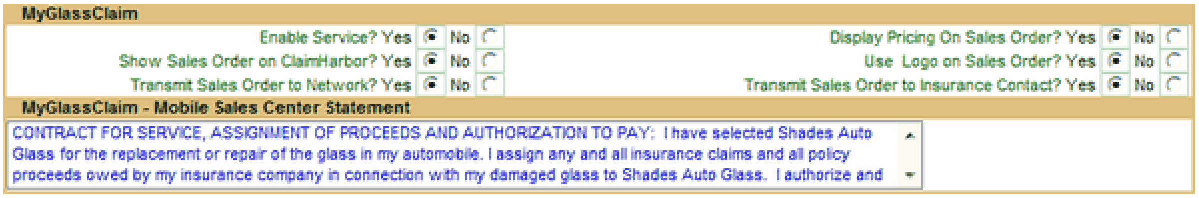
Shop Detail - Hours and Days of Operation

20. See the Profit Analyzer section of this manual for the explanation and set up instructions for the Profit Analyzer section of the System Administration - Shop Detail panel.

Profit Analyzer	Include cost assumptions		0 to 25% for award level 1, etc
Kit estimated cost	$20.00	Rebate level 1	ValPak Book
Tech estimated cost	$30.00	Rebate level 2	Omaha Steaks
Operations estimated cost	$35.00	Rebate level 3	Delta Companion Ticket
Other estimated cost	$10.00	Rebate level 4	$100 VISA Gift Card

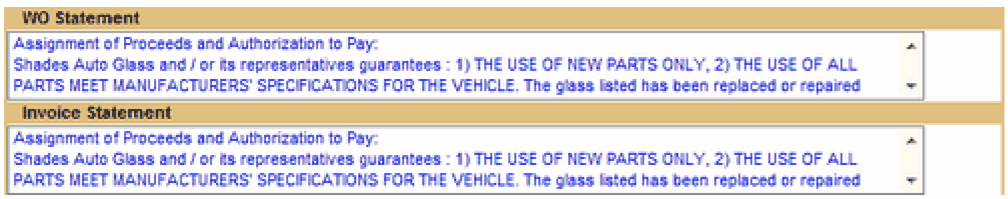
Shop Detail - Profit Analyzer

21. See the MyGlassClaim section of this manual for the explanation and set up instructions for the MyGlassClaim section of the System Administration - Shop Detail panel.



Shop Detail - MyGlassClaim

22. The final Shop Detail configuration is information you wish to have printed at the bottom of your Work Orders and Invoices. Enter the text you wish to appear on all of your print outs in the appropriate section. This is where you should enter your Assignment of Proceeds as this will be printed on the records that your customer should sign. When you are satisfied that all of the information is accurate, click the Save button.

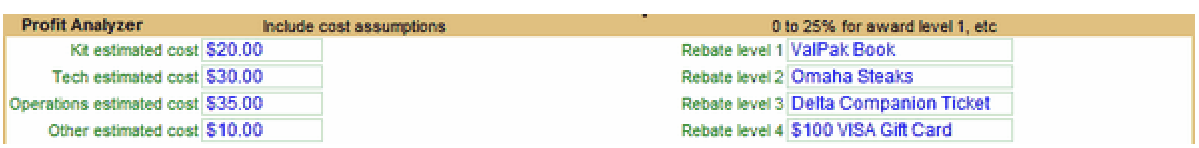


WO & Invoice Statements

1.10.1.1 Profit Analyzer

In order for the Profit Analyzer/Rebate program to work, you must first configure your rebate award levels and establish the cost basis for your company.

1. Go to Administration , click on System Admin and go to the Profit Analyzer section of the screen.



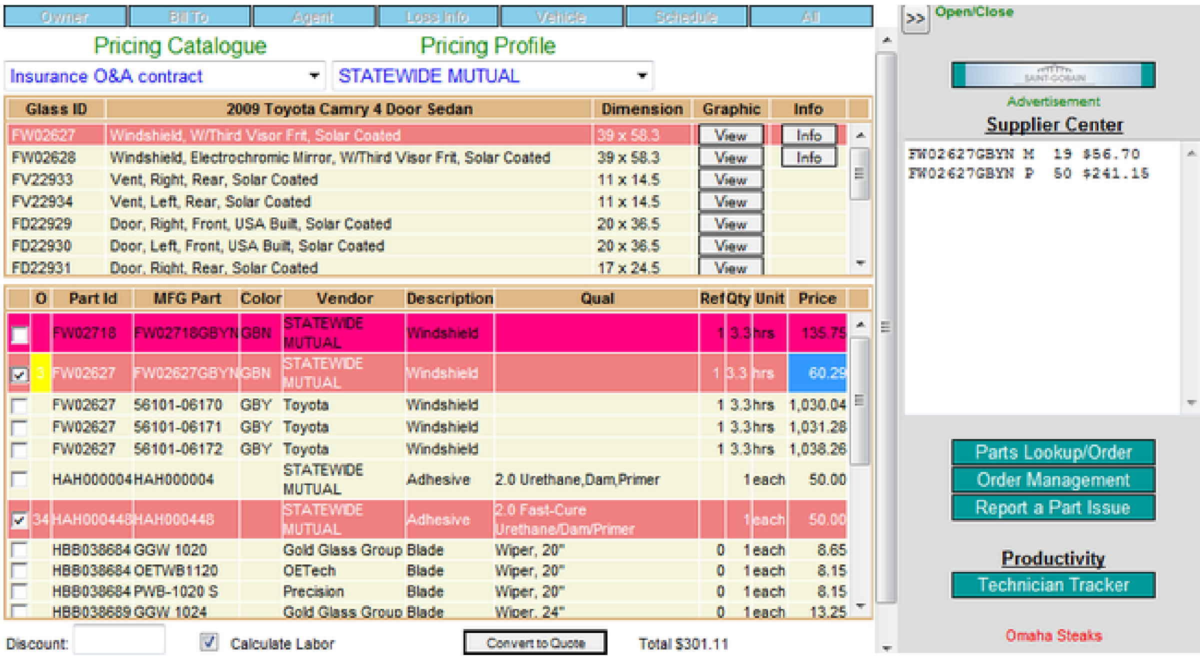
Shop Detail - Profit Analyzer

2. Enter your cost assumptions. These assumptions (Kit, Tech, Operations, Other) will be added to the glass part selected based on the lowest price displayed by the vendors you have set up (PGW, Mygrant and/or Pilkington) to arrive at your "cost".
3. Enter your Rebate levels. Rebate level 1 will be displayed if your sales margin falls between 0% - 25%, level 2 between 26% - 50%, level 3 between 51% - 75% and level 4 between 76% - 100%.
4. Once the appropriate changes have been made to the cost assumptions and award levels, click on the Save button.

When you select build a vehicle in the Quick Quote module and select Insurance O&A contract and the associated Insurance company, the Profit Analyzer will display the correct level based on the sales margin.

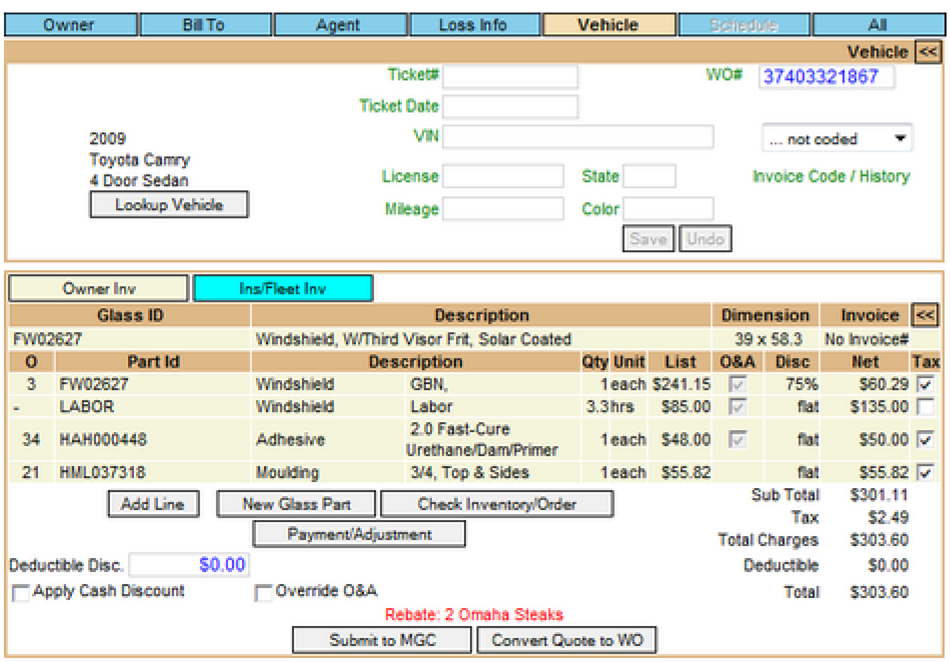
In the example below, the lowest cost glass price displayed is $56.70. That is added to the cost assumption total of $95.00 to give "cost" of $151.70. That cost is subtracted from the invoice "price" (located at the bottom of the screen based on the O&A pricing on the parts selected which includes labor, but not tax) of $301.11. The "margin" of $149.41 which is then divided by the "price" to give you the sales margin of 49.62% which falls into Rebate level 2 - Omaha Steaks which shows at the bottom of the Supplier Center panel in red. Once the Quick Quote is converted to a Quote, the

Rebate level will be saved and displayed on the Vehicle tab in the Ins/Fleet invoice section.



Lowest cost glass part + cost assumptions (from System Admin) = cost
Invoice price - cost = margin
(Margin / invoice price)*100 = sales margin

Profit Analyzer will also calculate when creating a Quote or Invoice which is set as Bill To Insurance, based on the steps above.



1.10.1.2 MyGlassClaim

When automotive glass repair and replacement companies acquire a customer via telephone, they have no way to obtain the customer's acknowledgement for the assignment of proceeds (AOP) and create an executed contract. This process is the key to prevent steering either during the FNOL and/ or a possible inspection process by making available this "contract" electronically to all parties.

In addition, by including the customer in the process of reviewing their scheduled job and agreeing to the shop's terms and conditions, the shop will retain more control over their customer and the processes ahead of them.

Getting Started:

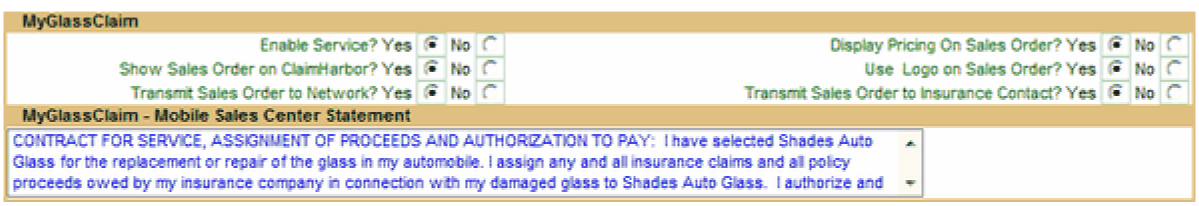
Before you can use MyGlassClaim, you must first setup the parameters required to make this service work in your eDirectGlass account.

1. Go to Administration then click on the System Admin button.
2. In the Shop Detail panel, scroll down to the section labeled MyGlassClaim.

MyGlassClaim Enable Panel

3. By default, the service is not enables so to turn it on, simply click on the 'Yes' radio button. **NOTE:** In order to use the MyGlassClaim service, you must provide your own SMTP mail server and email account credentials in your 'Shop Details'

4. When you click on the 'Yes' radio button, the section will expand to show a set of features for the service.



5. Selecting the 'Yes' radio button next to Display Pricing on Sales Order will show pricing on the Sales Order that will be sent to the customer, insurance company and/or the third-party administrator (aka Safelite, LYNX, etc.).
6. Selecting the 'Yes' radio button next to Show Sales Order on ClaimHarbor will make the signed Sales Order available for view by the customer, insurance company, and/or the third-party administrator on Claim Harbor (www.claimharbor.com).
7. If you have uploaded your own Custom Logo, you can have it displayed on your MyGlassClaim page where the customer will see their Sales Order. If you want this feature, select the 'Yes' radio button to the right of Use Logo on Sales Order.
8. If you want to have the executed Sales Order emailed to the Network (aka Safelite, LYNX, etc.) after the customer has signed and submitted the Sales Order, select the 'Yes' radio button to the right of Transmit Sales Order to Network.
9. If you want to have the executed Sales Order emailed to the contact found in the C&V record for the insurance company selected, after the customer has signed and submitted the Sales Order, select the 'Yes' radio button.
10. You must enter a statement that is the 'Terms & Conditions' you want the customer to agree to in the 'MyGlassClaim - Mobile Sales Center Statement'. **NOTE:** We recommend you use the following statement that will provide the best protection for you and your customer. Please note this

statement does not guarantee any protection and as with all legal matters, please consult an attorney.

CONTRACT FOR SERVICE, ASSIGNMENT OF PROCEEDS AND AUTHORIZATION TO PAY: I have selected (YOUR COMPANY NAME) for the replacement or repair of the glass in my automobile. I assign any and all insurance claims and all policy proceeds owed by my insurance company in connection with my damaged glass to (YOUR COMPANY NAME). I authorize and direct my insurance company to release policy, coverage and all other information related to my damaged automobile glass to (YOUR COMPANY NAME). If my glass has been replaced rather than repaired, I have insisted that, where possible, (YOUR COMPANY NAME) use original equipment parts and materials in the replacement of my automobile glass. I agree to pay my deductible, if any, myself. If I do not have insurance coverage, I agree to pay for the work myself.

11.When you are finished selecting your options and completing the statement, click on the [Save] button at the bottom of the screen.

Using MyGlassClaim

The MyGlassClaim service will only be available during the Quote or Work Order phase. Depending on how your shop wants to handle the process, most shops will use the service in the Work Order phase, after the job has been scheduled. While this is the recommended method, you can use the service as your operation sees fit.

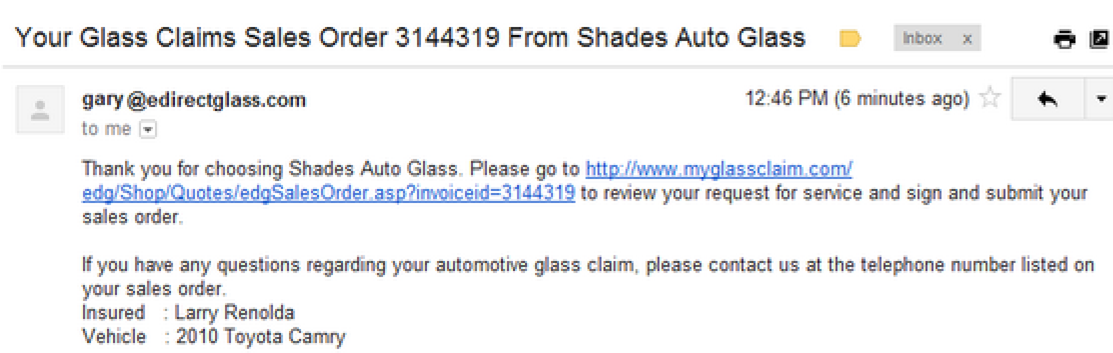
When in a Quote or Work Order on the Vehicle tab, you will see a button called [Submit to MGC] at the bottom of the Owner Inv or Ins/Fleet Inv screen next to the [Convert Quote to WO] if you are in a Quote or the [Convert WO to Invoice] if you are in a Work Order. You can only click on the [Submit to MGC] button once, so make sure you are doing it at the right time in your process with the customer.

Once you click on the [Submit to MGC] button, the system will send an email to the customer via the email address provided on the Owner panel. The system will display the date and time the MGC customer notification was sent.

Sent to MGC 2/12/2013 12:51:00 PM

[Convert Quote to WO]

The email the customer receives will contain instructions on how to access their service request by providing a link directly to the Sales Order.



When the customer clicks on the link provided in the email, it will take them to their service request on the MyGlassClaim Internet portal.

Shades Auto Glass
8687 E Via De Ventura
STE 310
Scottsdale, AZ 85260

Thank you for selecting us for you automotive glass needs!
1) Please review your request for automotive glass repair or replacement service below.
2) Carefully read the Terms & Conditions and click on the 'I AGREE' button.
3) Sign the request using your mouse or touch device and click on the Submit button to complete your service request.

This is your information

Insured:
Larry Renolda
1234 E Anywhere St
SCOTTSDALE, AZ 85258
(480) 555-1212
Email:
edirectglass@gmail.com

Insurance Company:
STATEWIDE MUTUAL
Claim #
Policy # 456456664
Vehicle:
2010 Toyota Camry 4 Door Sedan
VIN: 4T1BF3EK8AU524988

Date:
02/12/2013
SO # 3144319

These are the Parts or Services we will use

Part ID	Description	Qty	List	Disc	Net
FW02628GBYN	Windshield GBN	1	$269.35	50%	$134.68
FW02628GBYN	Windshield Labor	3.3	$85.00 flat		$135.00
HAH000448	Adhesive 2.0 Fast-Cure Urethane/Dam/Primer	1	$50.00	flat	$50.00
WFS F2628	Moulding 3/4, Top & Sides	1	$55.82		$55.82
				Sub Total	$375.50
				TAX	$3.61
				Gross Total	$379.11
				Deductible	*$0.00*
				Net Total	**$379.11**

This is the Job Schedule Information (*if applicable*)

Scheduled for:
Notes:

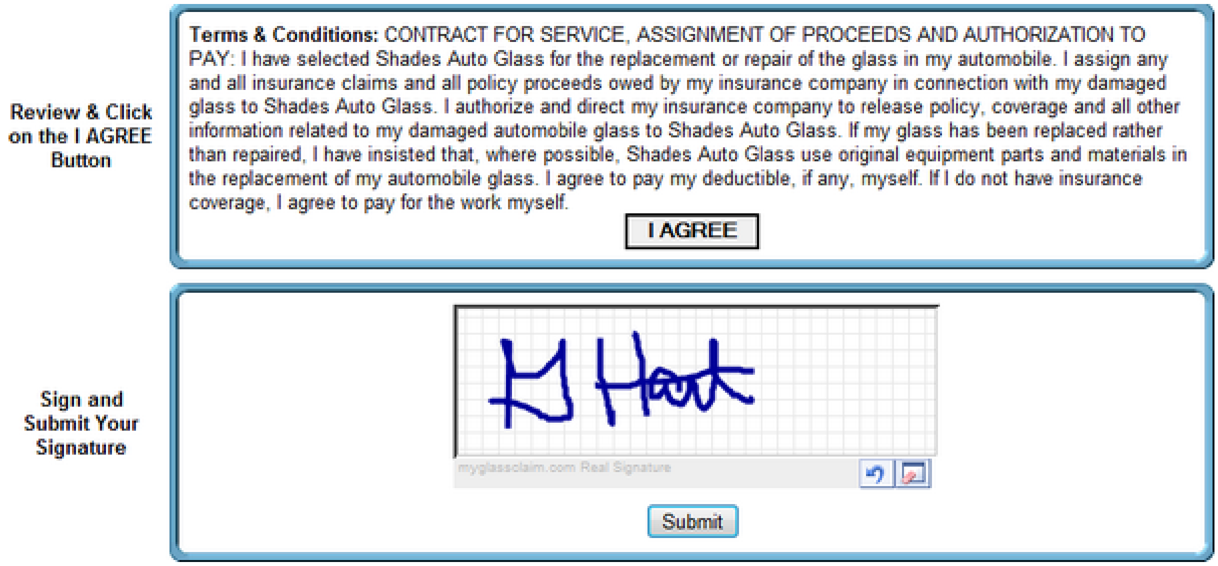
Review & Click on the I AGREE Button

Terms & Conditions: CONTRACT FOR SERVICE, ASSIGNMENT OF PROCEEDS AND AUTHORIZATION TO PAY: I have selected Shades Auto Glass for the replacement or repair of the glass in my automobile. I assign any and all insurance claims and all policy proceeds owed by my insurance company in connection with my damaged glass to Shades Auto Glass. I authorize and direct my insurance company to release policy, coverage and all other information related to my damaged automobile glass to Shades Auto Glass. If my glass has been replaced rather than repaired, I have insisted that, where possible, Shades Auto Glass use original equipment parts and materials in the replacement of my automobile glass. I agree to pay my deductible, if any, myself. If I do not have insurance coverage, I agree to pay for the work myself.

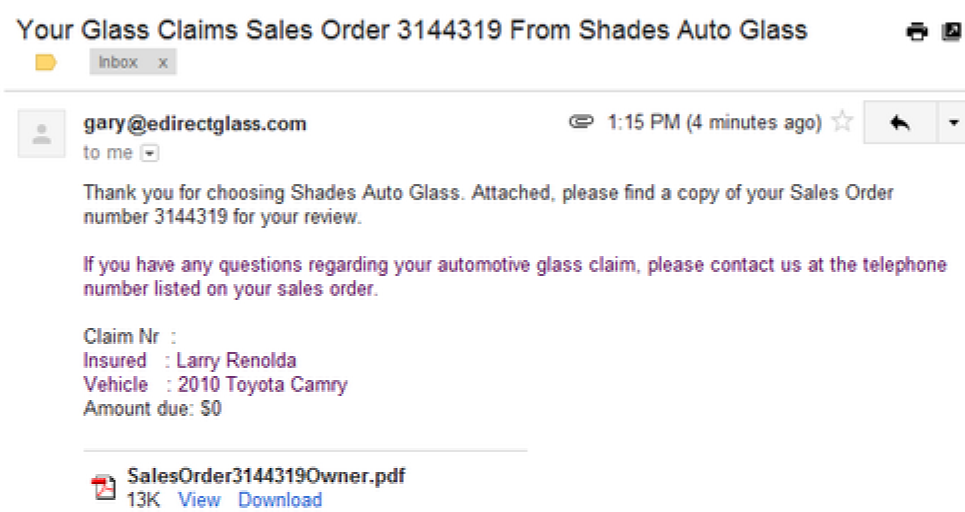
I AGREE

The customer can review the information found in the service request and if needed, can instruct your shop to make any corrections before they agree to the Terms & Conditions and sign it. **NOTE:** If you must make corrections, the customer only has to reload/refresh the page or click the link in the original email they received.

Once the customer is satisfied with the information found on the service request, they must review and agree to your Terms & Conditions. When they click on the I AGREE button, a signature pad will appear that will allow them to sign the Sales Order with either their mouse or a touch device.



Once they have signed the Sales Order, they must click on the Submit button. After they have clicked on the Submit button, MyGlassClaim will then send the customer a copy of their signed Sales Order.



The system will also place a copy of the signed Sales Order in the Attachments folder of their claim record in eDirectGlass.

Attachments for Job #3144319

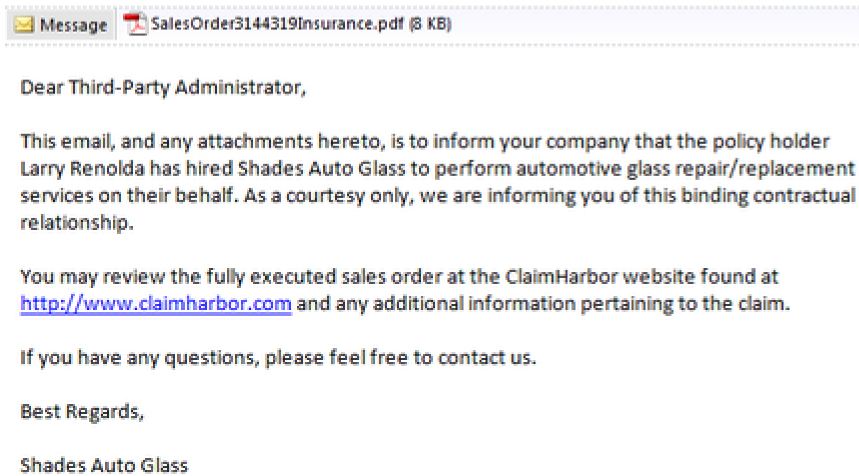
File Name	WO Print?	Inspection Image?	DI?	Title	Description
SalesOrder3144319.pdf	☐	☑	☐	Sales Order	

In the eDirectGlass Quote or Work Order, the system will also report the time and date the customer submitted the Sales Order.

Sent to MGC 2/12/2013 12:51:00 PM, Complete: 2/12/2013 1:20:00 PM

Convert Quote to WO

If you selected either the Transmit Sales Order to Network or Insurance Contact in your MyGlassClaim setup, MyGlassClaim will send a copy of the signed Customer Sales Order - First Notice of Loss to the respective parties via email.


Message | SalesOrder3144319Insurance.pdf (8 KB)

Dear Third-Party Administrator,

This email, and any attachments hereto, is to inform your company that the policy holder Larry Renolda has hired Shades Auto Glass to perform automotive glass repair/replacement services on their behalf. As a courtesy only, we are informing you of this binding contractual relationship.

You may review the fully executed sales order at the ClaimHarbor website found at http://www.claimharbor.com and any additional information pertaining to the claim.

If you have any questions, please feel free to contact us.

Best Regards,

Shades Auto Glass

The email will contain the customer executed 'Sales Order - First Notice of Loss' in PDF format and remind the Network and/or Insurance company they can view the record on the ClaimHarbor System.

Depending on your situation (network agreement, etc.), you may still be requires to report the loss and obtain authorization from the Network and/or Insurance company. MyGlassClaim is not a substitution for these or other processes required by the Network and/or Insurance company.

MyGlassClaim was developed to supplement the claim reporting process by establishing definitive proof that the customer has hired your shop to perform replacement or repair services and that they have established, on their own, that a loss condition exists.

Should you encounter steering or other tactics employed by third-party administrators, simply inform them that your company has already made available the executed Sales Order with the customer to their company prior to the call and that any further attempt to steer the customer is considered illegal interference. In most cases, the CSR at the Network may not be aware of such reporting; however, you can verbally instruct them to simply visit www.ClaimHarbor.com to review the Sales Order or other related claim materials.

ClaimHarbor Portal

1.10.1.3 Multiple Tax IDs & Rates

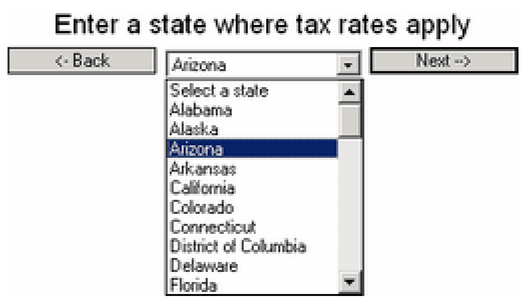
If your company is responsible for paying taxes using differing rates (i.e., reporting to multiple city, county or state agencies), you can administer those rates in the Administration module of eDirectGlass. This function allows you to ensure that the proper tax rates are applied to your company's invoices based on the zip code entered on the Owner tab of the claim record. Please keep in mind that any rates entered under Multiple Tax IDs will be added to the tax rates which you may already have set up under System Admin.

1. From the eDirectGlass Main Screen, click on the Administration button.
2. On the Administration Sub Menu, click on the System Admin button.
3. The View Tax-ID button and the Add Tax-ID button will be displayed in the Administration Sub Menu.

NOTE: If your shop pays only one tax rate, you should only ever set up the tax information in the Shop Detail *(see the section on Shop Administration of this manual)*.

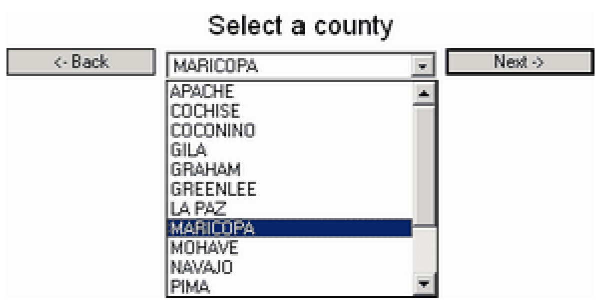
1.10.1.3.1 Add Tax IDs & Rates

1. Click on the Add Tax-ID button to begin adding your multiple tax ids and rates.
2. From the drop down list, choose the state then click on the Next --> button.



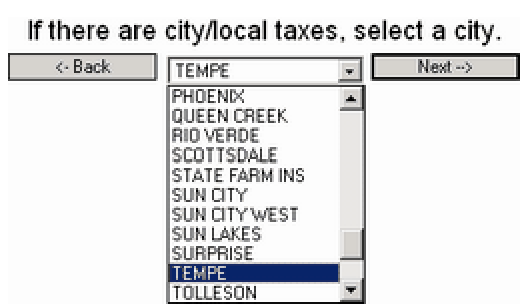
State Selection Screen

3. From the next drop down list, choose the county then click on the Next --> button.



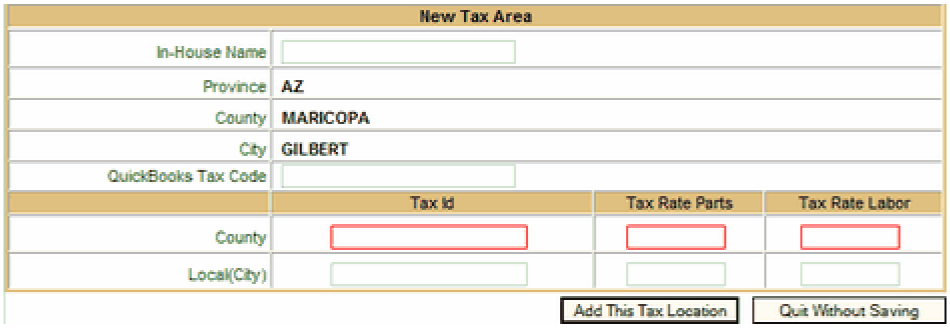
County Selection Screen

4. Next you may either choose a city, if applicable, from the drop down list or leave the No City Tax and click on the Next --> button.



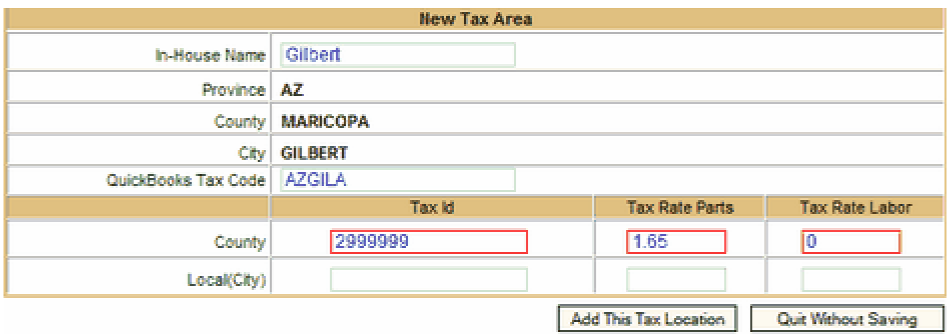
City Selection Screen

5. The New Tax Area window will now be displayed in the Work Area.



New Tax Area Window

6. Complete the tax information for this locality. Solid red boxes denote required fields and must be completed before continuing. **Note: If your county does not have a tax rate for labor simply enter a zero in the field. QuickBooks Users only:** The QuickBooks Tax Code must match exactly what you have set up in your QuickBooks company file for tax for this area to export correctly.

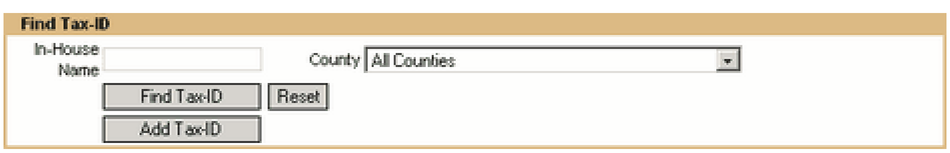


Completed New Tax Area Window

7. When you have completed all of the information for this tax id, click on the Add This Tax Location to save this information or you may click on the Quit Without Saving button if you do not wish to add the record at this time.

1.10.1.3.2 View & Maintain Tax IDs & Rates

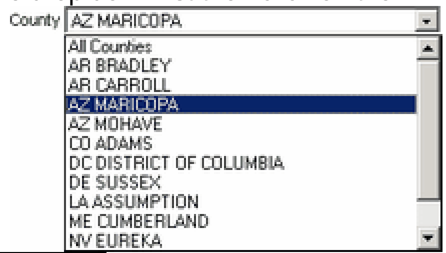
1. Click on the View Tax-ID button to display the Find Tax-ID window in the Work Area.



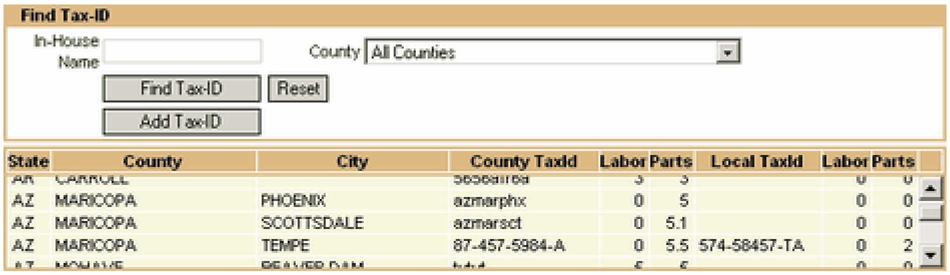
Find Tax-ID Window

2. At this point, you have three options:
a) enter in the In-House Name of the record you are trying to locate in the In-House Name box then click on the Find Tax-ID button,

b) select the county from the drop down list then click on the Find Tax-ID button, or

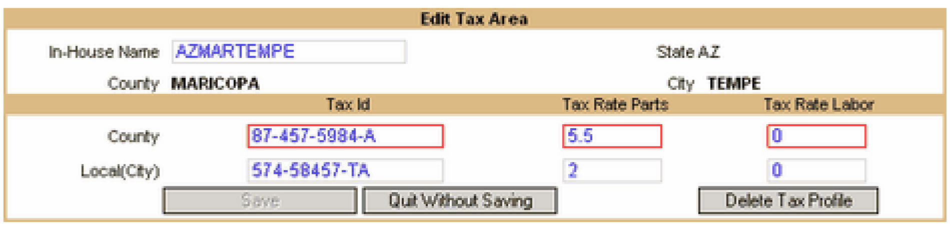


c) just click on the Find Tax-ID button to display all of the tax locations that have been entered. **Note: You will need to scroll in the list to see all of the locations.**



Find Tax-ID List Window

3. To edit a location, double-click on the line containing the record you wish to maintain to display the Edit Tax Area window in the Work Area.



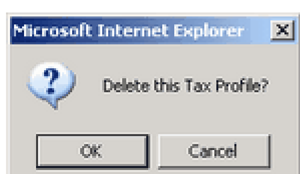
Edit Tax Area Window

4. Your three options here are:

a) to view the information without making any changes simply click on the Quit Without Saving button when you have finished reviewing the record,

b) to update/change the record as necessary then click on the Save button when you have completed this task, or

c) to permanently delete this tax profile from the system by clicking on the Delete Tax Profile button. Once you select the Delete Tax Profile button, a dialogue box will appear requiring you to confirm that you wish to delete the record. Click on the OK button to delete or on the Cancel button if you do not wish to delete this record.

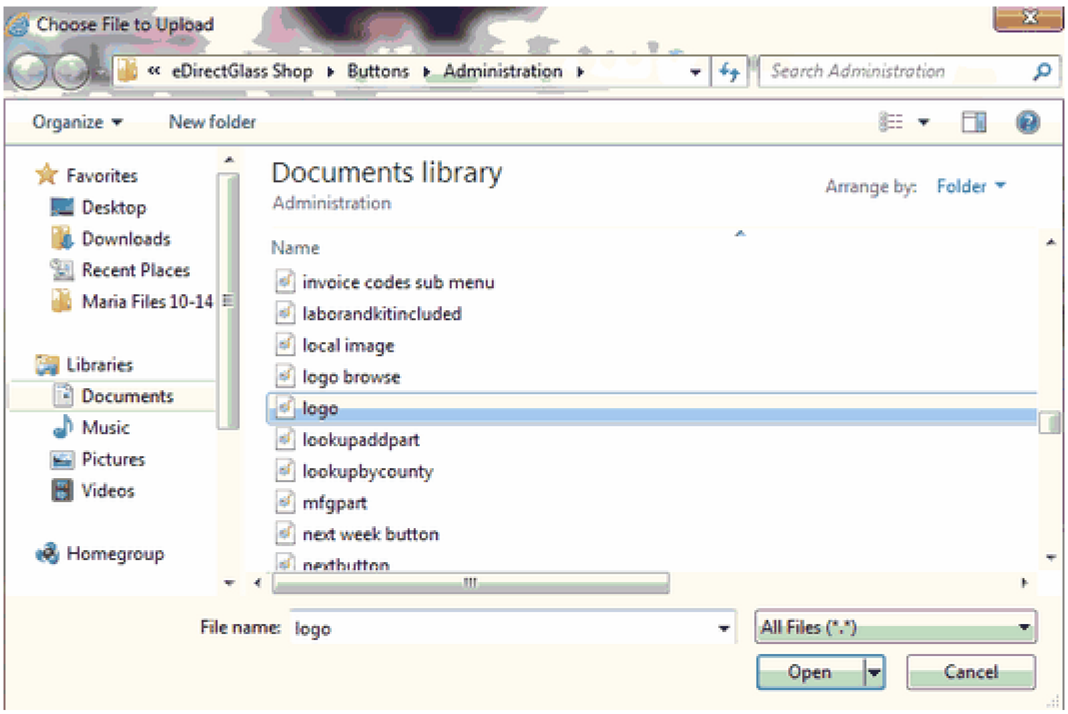


Delete Tax Profile Dialogue Box

1.10.1.4 Custom Logo

eDirectGlass allows you to upload and use your own logo to print out on the Quote, Work Order and Invoices.

1. To upload your logo, go to Administration, System Admin and click on the Custom Logo button.
2. This will bring you to the Custom Logo Selection Panel. At the end of the Local Image: box, click on the Browse... and locate the logo file on your computer. Once you have located the file and selected it, click on the Open.



3. To use the selected image on your Quotes, Work Orders and Invoices, you must now click on the Upload the image button. Your logo has now been saved to your eDirectGlass account.

1.10.1.5 Customer Satisfaction Index

The Customer Satisfaction Index ("CSI") module allows your shop to measure its performance with regards to customer feedback.

What is CSI? Customer satisfaction, a term frequently used in marketing, is a measure of how products and services supplied by a company meet or surpass customer expectation. Customer satisfaction is defined as "the number of customers or percentage of total customer, whose reported experience with a firm, its products, or its services (ratings) exceeds specified satisfaction goals.

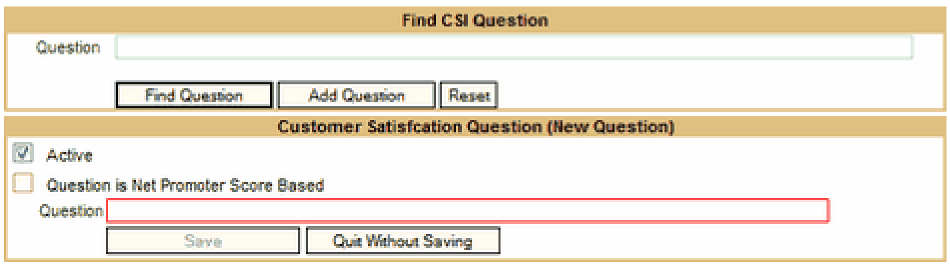
In the competitive automotive glass repair and replacement marketplace where shops compete for customers, customer satisfaction is seen as a key differentiator and increasingly has become a key element of business strategy especially with networks and their insurance company partners.

Within shops, customer satisfaction ratings can have powerful effects. They focus employees and technicians on the importance of fulfilling customers' expectations. Furthermore, when these ratings dip, they warn of problems that can affect sales and profitability.

These metrics quantify an important dynamic. When a shop has loyal customers, it gains positive word-of-mouth marketing, which is both free and highly effective. Therefore, it is essential for shops to effectively manage customer satisfaction. To be able to do this, shops need reliable and representative measures of satisfaction and that is what the CSI module in eDirectGlass delivers.

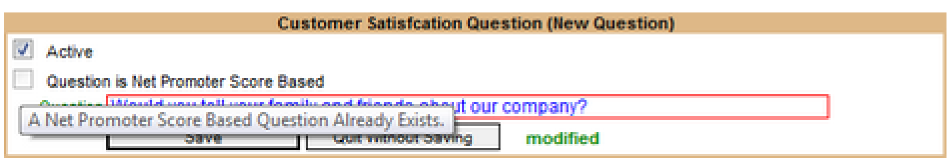
1.10.1.5.1 Adding CSI Questions

1. To setup your CSI questions, got to Administration, System Admin and select the CSI Questions button at the bottom of the left sub-menu.
2. To add a new question, click on the Add Question to get the Customer Satisfaction Question (New Question) Panel.



Customer Satisfaction Question (New Question) Panel

3. Make sure the Active checkbox is checked, enter your question and click on the Save button to add the question to your customer satisfaction survey. If this questions is to be used as your Net Promoter Score, make sure you check the Question is Net Promoter Score Based before you save panel. **NOTE:** You may only have one question set as your Net Promoter Score question. If you already have an NPS question set, the checkbox will not be active an a hover message will display indicating that one already exists. If you wish to change your NPS question, open the existing NPS question and uncheck the Question is Net Promoter Score Based and save that question again. This will allow you to add or assign a new NPS question for your company.



4.

1.10.2 User Administration

To add or maintain users for your eDirectGlass account, click on the User Mgmt button.

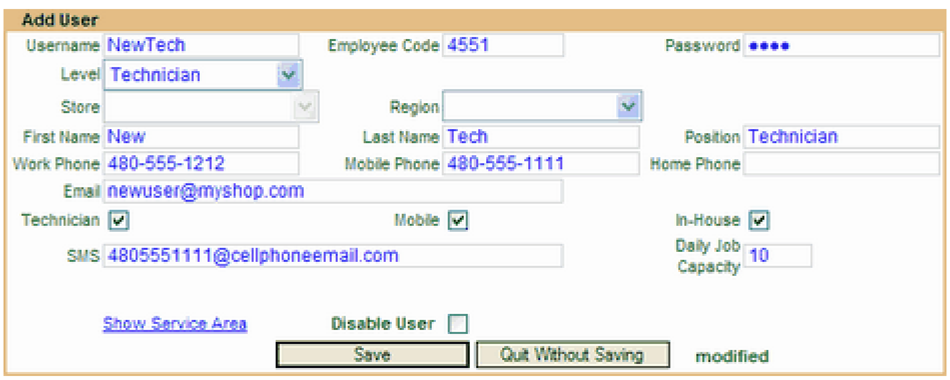
NOTE: You must enter in a User for all technicians and sales people to whom you wish to assign jobs. You must create a username for them even if you do not intend to give them access to the eDirectGlass system.

1.10.2.1 Adding a New User

1. In the Find User box, click on the Add User button.
2. In the Add User window, enter a Username and Password. NOTE: The username must be a unique username to the eDirectGlass system, not just your account. Try using firstname.lastname in order to avoid your user not being able to be saved.

3. Select the User's level:
   Training
   Manager
   CSR
   Admin
   Sales Person (must be selected in order for the user to appear on the Sales Person drop down on the Owner Tab)
   Technician (must be selected in order for the user to appear on the Schedule Tab to have jobs assigned to them)
   NOTE: Until you modify the user rights *(see User Rights section of this manual)*, they will not have access to any areas of eDirectGlass.

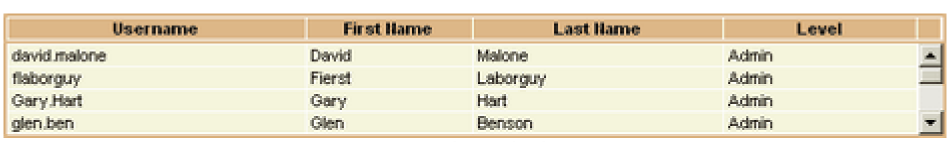
4. If the user is a technician select whether they are Mobile ☐, In-House ☐ or both and also enter in their Daily Job Capacity if you are a shop that is AM/PM based. The total Daily Job Capacity for all of your technicians will be used to determine the total daily job capacity for your shop.
5. Also, if the user is a technician, the SMS box will display. This function allows the system to alert the user of jobs that have been added to their schedule on the same business day. If you enter the correctly formatted SMS email address (i.e., 4805551111@cellphoneemail.com), a notice will be sent directly to the technician's cellphone via text message telling them a job has been added and that they need to check their schedule for today.
6. Enter the First and Last name, position, phone and email information and click on the Save button.



Add User Window

1.10.2.2 Maintaining Users

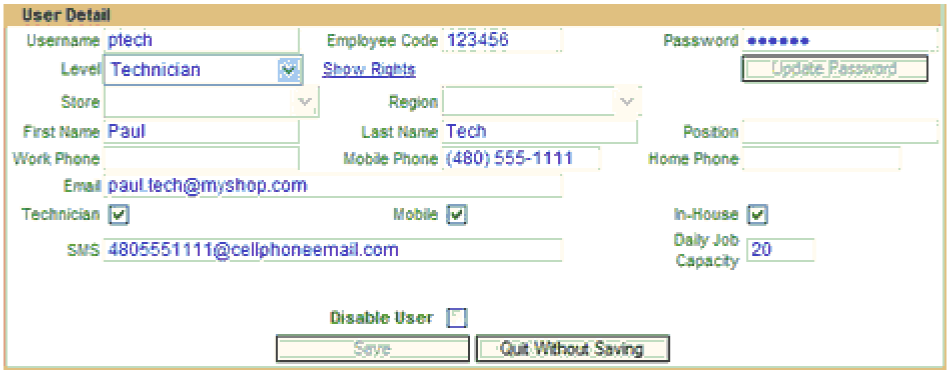
1. In the Find User box, enter a username, first name or last name then click on the Find User button. To see all users for your account, just click on the Find User button without entering any names.
2. From the User List window, click on the name you wish to maintain.



Username	First Name	Last Name	Level
david.malone	David	Malone	Admin
flaborguy	Fierst	Laborguy	Admin
Gary.Hart	Gary	Hart	Admin
glen.ben	Glen	Benson	Admin

User List Window

3. In the User Detail window, make the changes required, then click on the Save button. **NOTE: If you need to disable a user for any reason, all you have to do is check off the Disable User ☐ box and then click on the Save button. This will deny them access to the entire system. If you do not want to make any changes, click the Quit Without Saving button.**

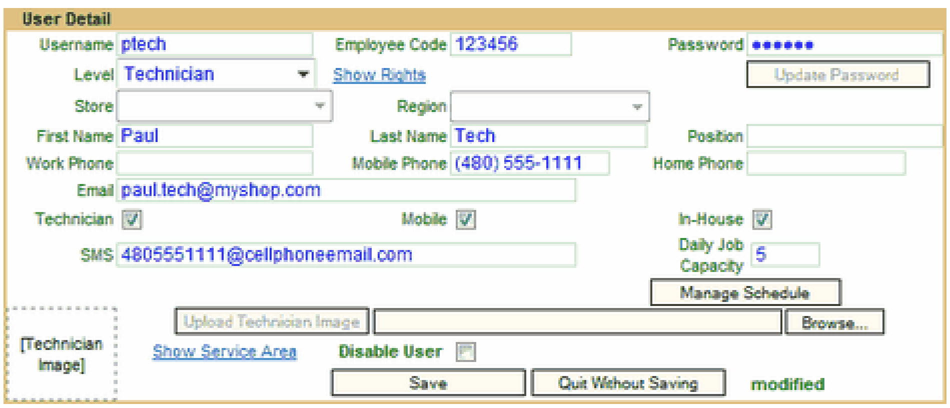


User Detail Window

1.10.2.2.1 Manage Schedule

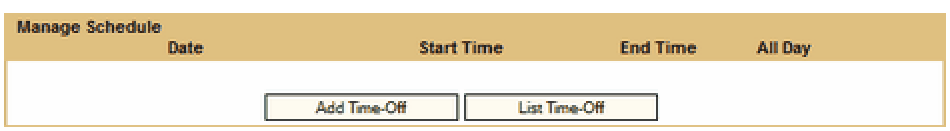
The Manage Schedule feature allows you to block off time on your schedule for a particular technician when they will be available for jobs to be scheduled to them. The Manage Schedule feature allows you to mark the technicians as unavailable for a specified time frame or for all day.

1. Click on Administration, User Mgmt, then enter the technician's Username, First Name and/or Last Name and click on the Find User button to bring up the User Detail panel.



User Mgmt - User Detail - Technician

2. Click on the Manage Schedule button to access the Manage Schedule panel.



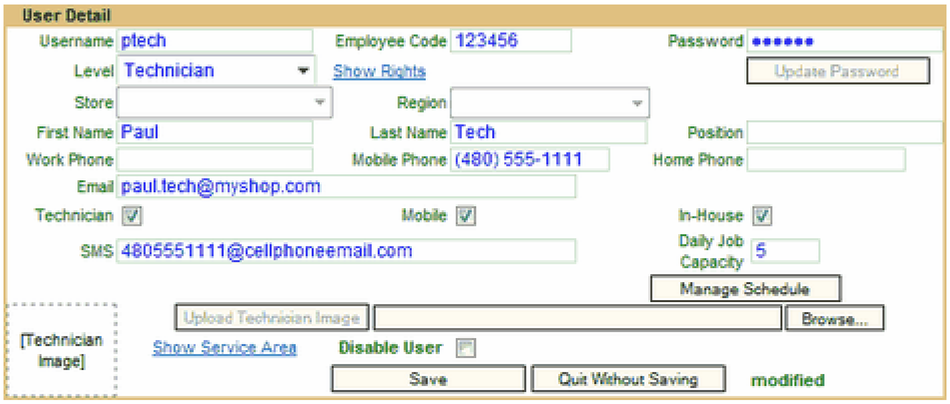
Manage Schedule Panel

3. Click on the Add Time-Off button to display the Add Time-Off Panel. Select the appropriate date and time or the appropriate date and check the All Day box and then click on the Save button to block that time frame off for the technician.
4. You may view a list of upcoming time off schedule for the technician by clicking on the List Time-Off button.

1.10.2.2.2 Technician Image

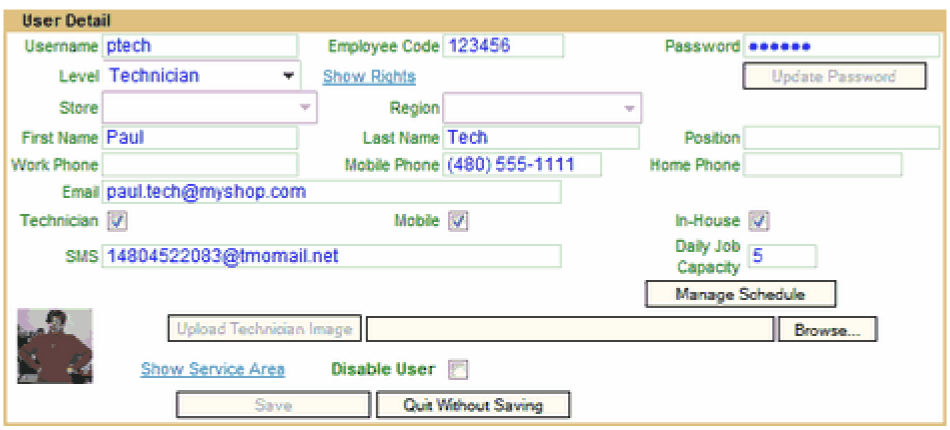
You may upload an image of your technician which can be added to you eMinder email appointment reminders so your customer will know who to be expecting for the appointment. Images may only be uploaded for a user marked as a Technician.

1. Click on Administration, User Mgmt, then enter the technician's Username, First Name and/or Last Name and click on the Find User button to bring up the User Detail panel.



User Mgmt - User Detail - Technician

2. Near the bottom right of the User Detail screen, click on the Browse... button and search your computer for the image you wish to upload for the technician. Select the image and click on the Upload Technician Image button to attach that image to the technician selected. Once you upload the image, a thumbnail copy will display in the lower left corner of the User Detail screen.



1.10.2.3 User Rights

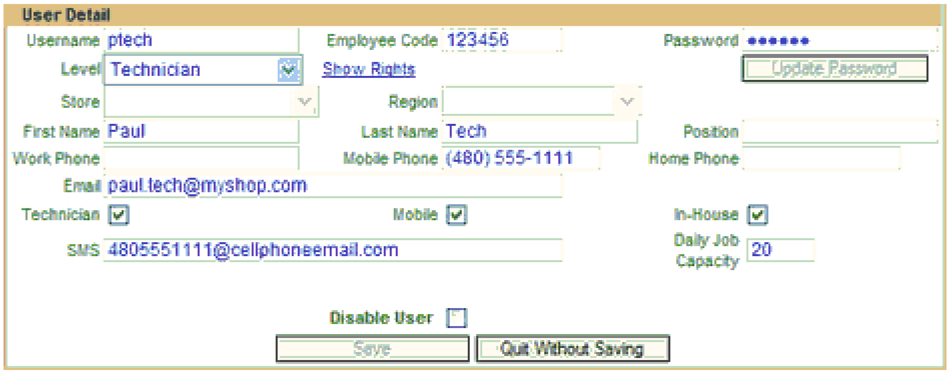
This function allows the system administrator to assign the level of access for each user.

1. In the Find User box, enter a username, first name or last name then click on the Find User button. To see all users for your account, just click the Find User button without entering any names.

Username	First Name	Last Name	Level
david.malone	David	Malone	Admin
flaborguy	Fierst	Laborguy	Admin
Gary.Hart	Gary	Hart	Admin
glen.ben	Glen	Benson	Admin

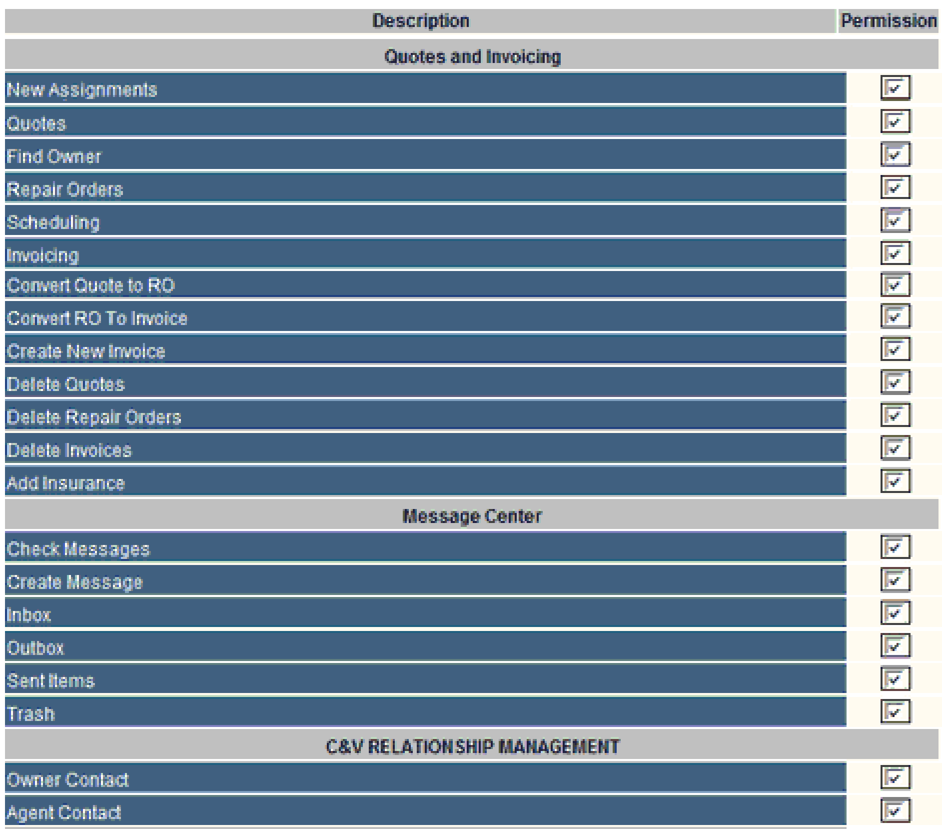
User List Window

2. From the User List window, click on the name you wish to maintain to bring up the User Detail window in the Work Area.



User Detail Window

3. Click on the Show Rights link next to the Level drop down list to display the User Rights window in the Work Area.



User Rights Window

4. The user will be able to access and change information in all areas which have a check mark in the Permission column. To deny user access to a specific area (e.g., Invoicing) remove the check mark from the Permission column.

5. When you have finished making the necessary changes to the user's rights, click on the

Save Changes button. If you do not wish to make any changes at this time, click on the Quit Without Saving button.

1.10.3 Commission & Writers

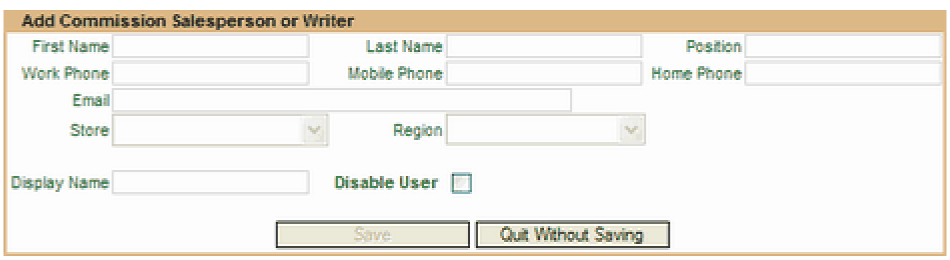
The eDirectGlass system allows you to enter users to be used to track up to three different commission amounts on an individual invoice basis. You will first need to set up the list of people who are eligible for commission payments. To add or maintain these records click on Administration button and then click on the User Mgmt button. This will display the Commission & Writers button under the Administration Sub Menu.

1.10.3.1 Adding a New Commission & Writers Entry

1. Once you have clicked on the Commission & Writers button in the Administration Sub Menu, the Find Commission Salesperson or Writer window will display in the Work Area. To begin adding a new entry, click on the Add User button.

Find Commission Salesperson or Writer Window

2. The Add Commission Salesperson or Writer window will now appear in the Work Area for you to complete.

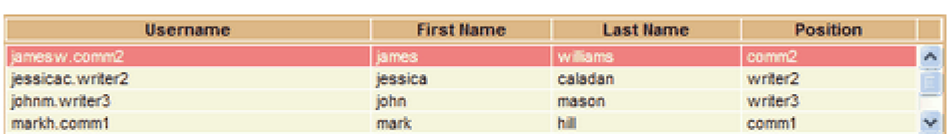


Add Commission Salesperson or Writer Window

3. Once you have filled out all of the information, click on the Save button.

1.10.3.2 Maintaining Commission & Writers Entries

1. In the Find Commission Salesperson or Writer box, enter a username, first name or last name then click on the Find User button. To see all users for your account, just click on the Find User button without entering any names.
2. From the Commission Salesperson or Writer List window, click on the name you wish to maintain.

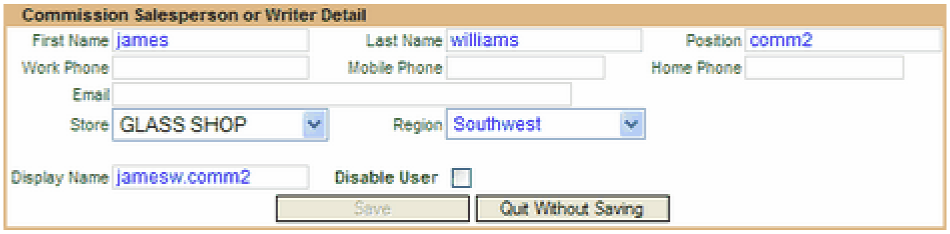


Username	First Name	Last Name	Position
jamesw.comm2	james	williams	comm2
jessicac.writer2	jessica	caladan	writer2
johnm.writer3	john	mason	writer3
markh.comm1	mark	hill	comm1

Commission Salesperson or Writer List Window

3. In the Commission Salesperson or Writer Detail window, make the changes required, then click on the Save button. **NOTE: If you need to disable a user for any reason, all**

you have to do is check off the Disable User box and then click on the Save button. This will remove them from the drop-down list used to assign commission to an invoice. If you do not want to make any changes, click the Quit Without Saving button.

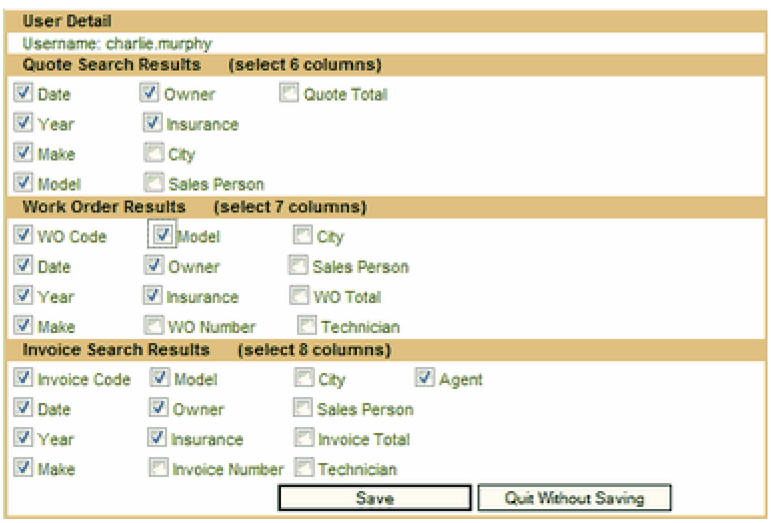


Commission Salesperson or Writer Detail Window

1.10.4 Search Result Settings

eDirectGlass allows the individual user to select and maintain which columns show when they search in each of the Quotes & Invoicing sections (e.g., Quotes, Work Order & Invoicing). This features allows you to see at a glance the fields that you need to complete your work more quickly. These settings only effect the Find results and not the record data itself.

1. Click on the Administration button then select the User Mgmt button and then the Search Result Settings button.
2. In the Find User panel that comes up, enter the Username, First Name and/or Last Name and click on Find User button.
3. Double click on the name in the list to bring up the User Detail screen which will list the Quote, Work Order and Invoice Search Results sections.



User Search Results

4. You may only select up to 6 columns for Quotes, 7 columns for Work Orders and 8 columns for the Invoice Find panels. Once you have finished, click on the Save button to commit your changes or click on the Quit Without Saving button to ignore any changes you may have made.

1.10.5 Parts Admin

This section will allow you to add and maintain custom/special parts profiles.

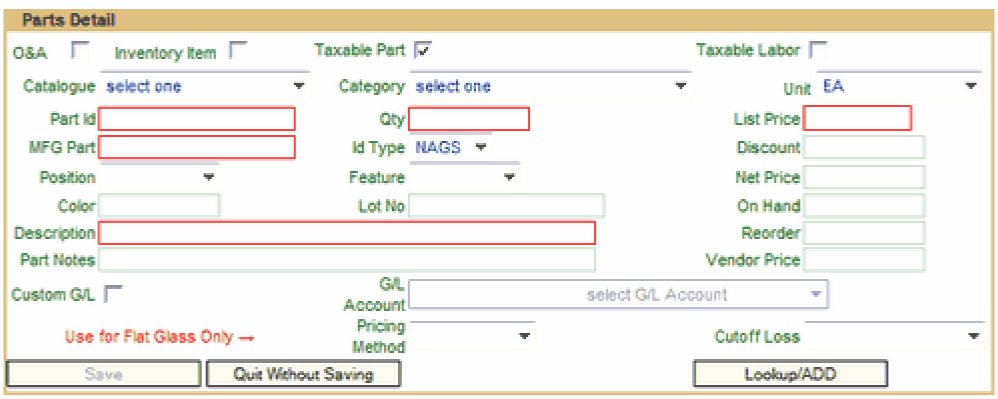
1. From the eDirectGlass Main Screen, click the Administration button.
2. On the Administration Sub Menu, click on the Parts Admin button.
3. The Parts Management window will be displayed in the Work Area.

Parts Management Window

4. At this point, you can either choose the Add Parts button to create a new part or select a Catalogue (or Catalogue and Category and addition search criteria) and choose the button Find Parts to maintain an existing parts.

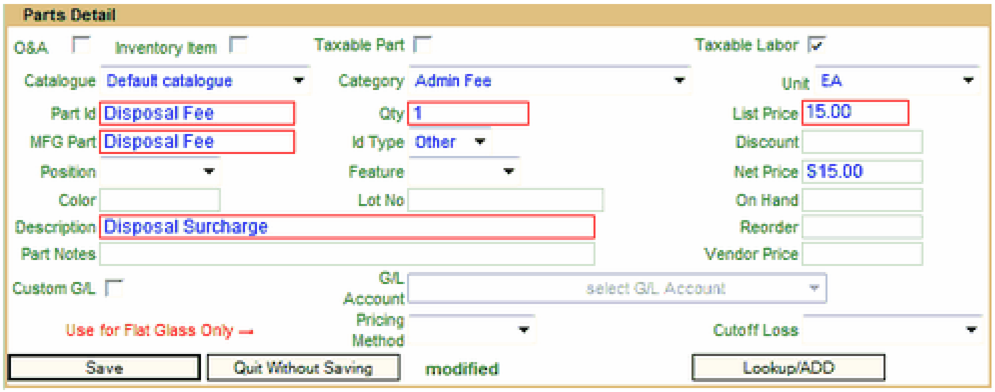
1.10.5.1 Adding a New Parts Profile

1. In the Find Parts Profile window, click on the Add Parts button to display the Parts Profile Detail (New Record) window in the Work Area.



Parts Profile Detail (New Record) Window

2. Enter part information. The solid red boxes are required fields and must be completed before the record can be saved. The Part Id is what will be displayed in the drop down list when adding the parts to a record, so they must be unique. **NOTE: You *must* select a Catalogue and Category from the drop downs as well as fill in all of the red boxes before the** Save **button will be active.**
3. After you have entered and verified that all of the information is correct, click on the Save button to add the new record. **NOTE: Make sure you check off the** Taxable ☑ **button (Part or Labor) if the item is taxable.**



Completed Parts Profile Detail (New Record) Window

4. If you do not wish to add the record at this time, click on the Quit Without Saving button.

You may also add a part from the Part Detail screen by clicking on the Lookup/ADD this will open a vehicle search that will take you to a list of NAGS parts to select from for that particular vehicle.

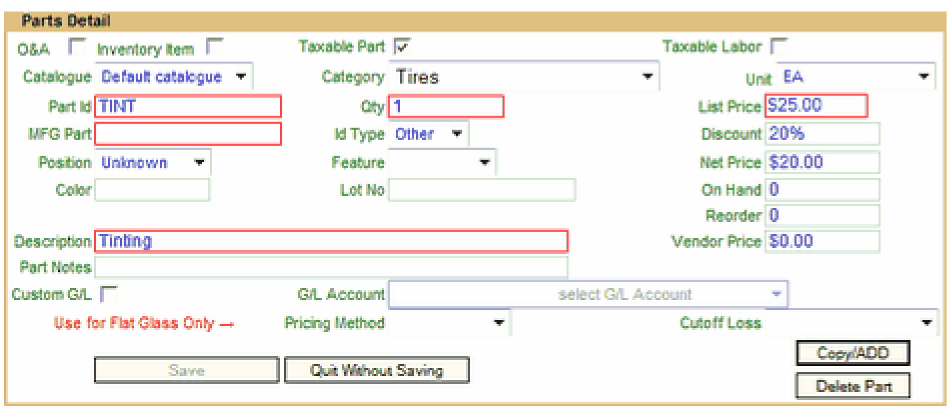
1.10.5.2 Maintaining Parts Profile

1. In the Find Parts Profile window, click on the Find Parts to display the list of all of the custom/special parts you have added to your eDirectGlass system. If you are looking for a specific part and know the Item Type , Description or Part Id , you can enter this information before clicking on the Find Parts button to narrow your search.

Item Type	Description	Part Id	Price
3MFILM	3M Tinting Film	3MFILM	$39.95
TINT-SPECIAL	Special Tinting	TINTSPEC	$50.00

Parts Profile List Window

2. Highlight the Item you wish to review/maintain to display the Parts Profile Detail window in the Work Area.



Parts Profile Detail Window

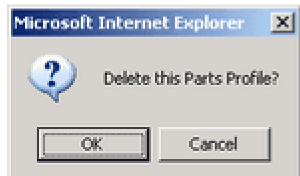
3. You will have three options at this point:

To **make changes and/or additions** to the information contained in this record and click on the Save button to record the changes.

To **review** the information without making any changes or additions, then click on the Quit Without Saving button.

To completely **remove** this Parts Profile Detail Record from your eDirectGlass system by clicking on the Delete Parts Profile button.

NOTE: Once you click on the Delete Parts Profile button, you will see a dialogue box verifying your desire to delete the record, if you choose OK, the record will be permanently removed from your eDirectGlass system.

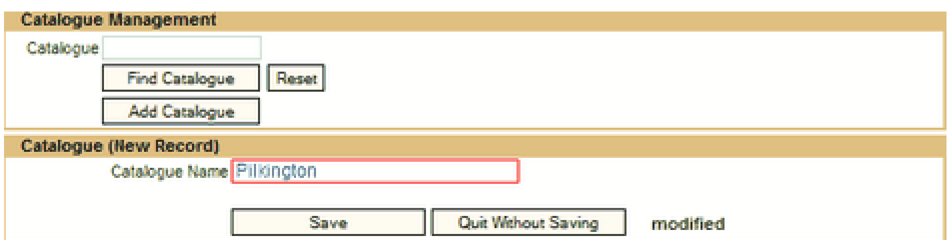


Delete Parts Profile Dialogue Box

1.10.5.3 Catalogues

Before you can upload a pricing file or add parts to a Catalogue, you must first create a Catalogue in your eDirectGlass account.

1. Clicking Administration, Parts Admin, click on the Catalogues button to display the Find and Add Catalogue features of eDirectGlass.
2. Click on the Add Catalogue button.
3. In the Catalogue Name box, enter the name for the Catalogue you wish to create.
4. When you have finished entering the Catalogue name, click on the Save button.



Add Catalogue Window

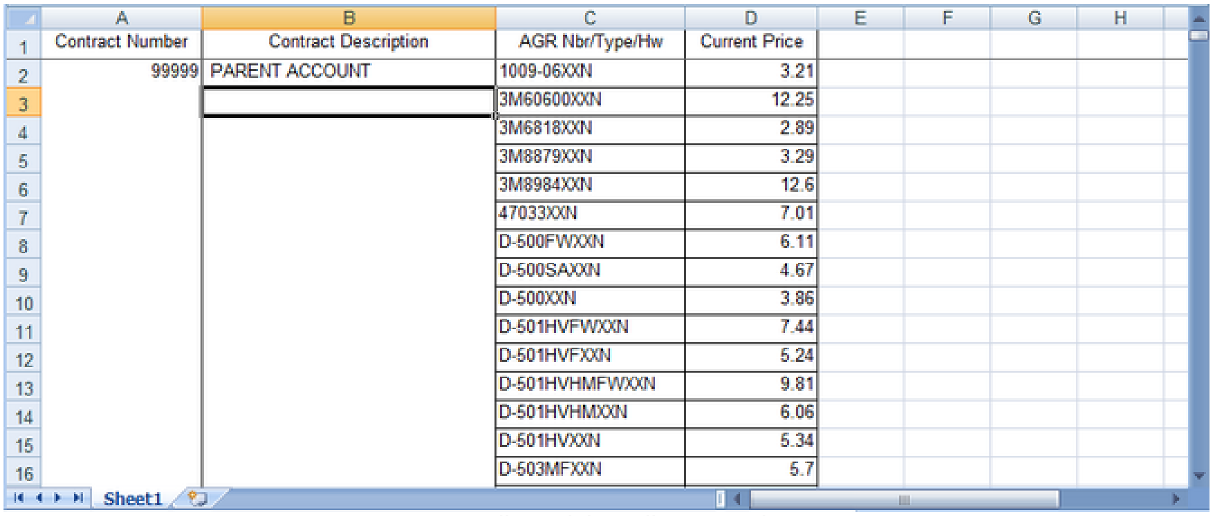
If you need to go back and update a Catalogue name, simply go to Administration, Parts Admin, Catalogues and click on the Find Catalogue button to display the list of Catalogues.

1.10.5.4 Pricing Import

Why would you want to upload a pricing file to a Catalogue in eDirectGlass?
a. If you want to create cost plus pricing profiles,
b. If you want to manage inventory without having to enter thousands of parts,
c. If you want to see your costs on your most popular parts you sell.

In order to upload a pricing file, you must first obtain a pricing file from your supplier. Most suppliers are able to provide you with an Excel file that contains the part numbers and pricing for the parts you regularly purchase or for all of the parts they sell.

The file that your supplier may send you will most likely not be formatted properly. For example, here is a view of a file that was provided by one of the suppliers.



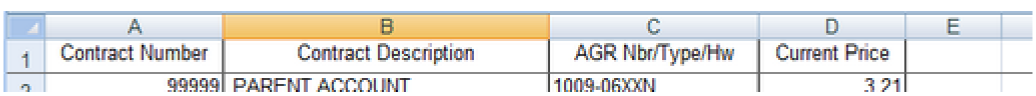
	A	B	C	D	E	F	G	H
1	Contract Number	Contract Description	AGR Nbr/Type/Hw	Current Price				
2	99999	PARENT ACCOUNT	1009-06XXN	3.21				
3			3M60600XXN	12.25				
4			3M6818XXN	2.89				
5			3M8879XXN	3.29				
6			3M8984XXN	12.6				
7			47033XXN	7.01				
8			D-500FWXXN	6.11				
9			D-500SAXXN	4.67				
10			D-500XXN	3.86				
11			D-501HVFWXXN	7.44				
12			D-501HVFXXN	5.24				
13			D-501HVHMFWXXN	9.81				
14			D-501HVHMXXN	6.06				
15			D-501HVXXN	5.34				
16			D-503MFXXN	5.7				

Supplier Pricing File Example

In order to import successfully in to eDirectGlass, you must modify the Excel file first. Please note, you must have Microsoft Excel in order to accomplish this step. If you do not have Microsoft Excel, please contact eDirectGlass technical support for further instructions.

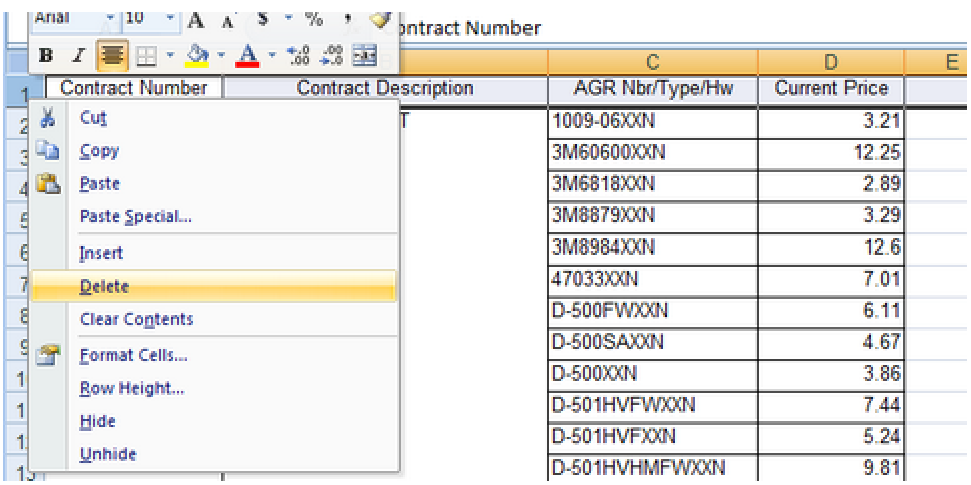
To modify the Excel file, please follow these steps:

1. Open the pricing file in Microsoft Excel.
2. If the first row contains a header, which are words in each column to identify what the column is, you must delete the row.



	A	B	C	D	E
1	Contract Number	Contract Description	AGR Nbr/Type/Hw	Current Price	
2	99999	PARENT ACCOUNT	1009-06XXN	3.21	

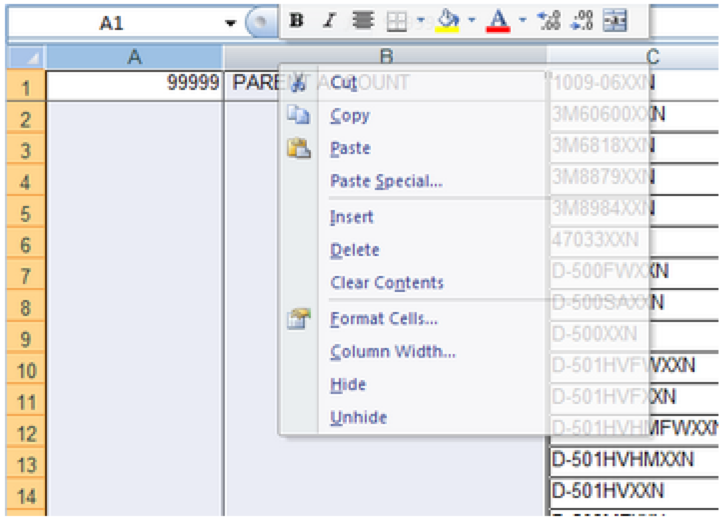
3. To delete the row, simply highlight the row and then right mouse click and select Delete.



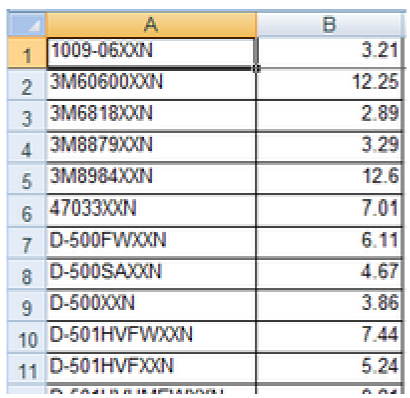
C	D
AGR Nbr/Type/Hw	Current Price
1009-06XXN	3.21
3M60600XXN	12.25
3M6818XXN	2.89
3M8879XXN	3.29
3M8984XXN	12.6
47033XXN	7.01
D-500FWXXN	6.11
D-500SAXXN	4.67
D-500XXN	3.86
D-501HVFWXXN	7.44
D-501HVFXXN	5.24
D-501HVHMFWXXN	9.81

4. Now that we have deleted the header row, if applicable, we now need to remove any unnecessary columns. The only columns that should be in the file will be the part number and price columns. In our example file, we have two unnecessary columns we must delete.

5. To remove unnecessary columns, select the columns so they are highlighted and then right mouse click and then click on the delete button.



6. Once you have deleted the columns, your file should now only contain two columns. The first column should only be part numbers and the second column should be only prices with no special characters ($ will need to be removed in order for the file to upload properly).

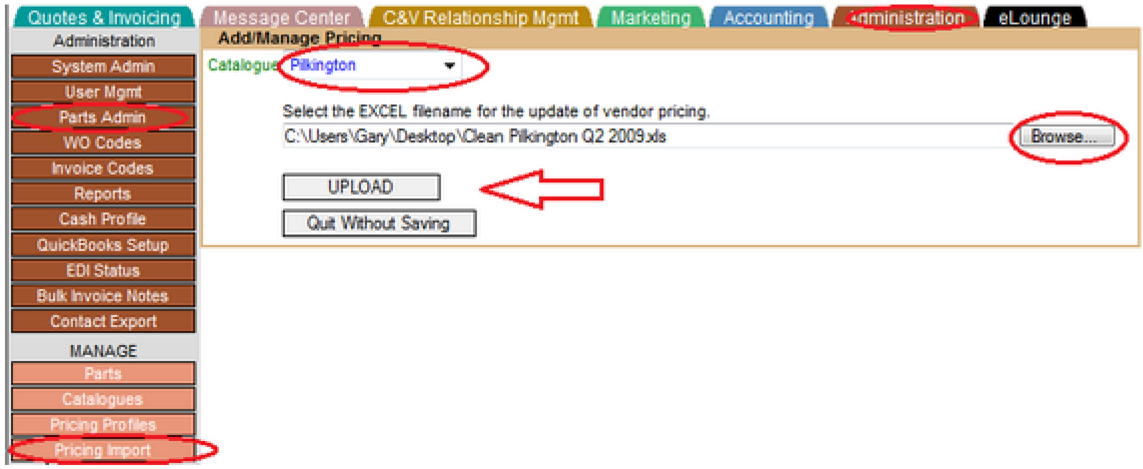


	A	B
1	1009-06XXN	3.21
2	3M60600XXN	12.25
3	3M6818XXN	2.89
4	3M8879XXN	3.29
5	3M8984XXN	12.6
6	47033XXN	7.01
7	D-500FWXXN	6.11
8	D-500SAXXN	4.67
9	D-500XXN	3.86
10	D-501HVFWXXN	7.44
11	D-501HVFXXN	5.24

7. You must now save this Excel file. You may wish to give it a new file name so you can preserve the original file that was delivered to you from your supplier.

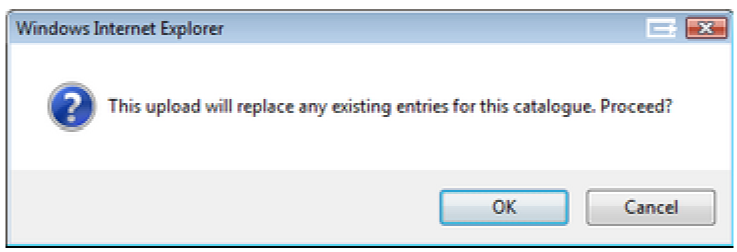
Uploading your pricing file:

1. In eDirectGlass go to Administration, Parts Admin, click on the Pricing Profiles button.
2. Select the Catalogue from the drop down that you wish to upload the pricing to.
3. Noow, click on the Browse... button and locate the pricing file you modified in the previous step and once you select the file, click on the Open button.
4. Now you must click on the UPLOAD button and the system will import your pricing file directly to the Catalogue you selected.



5. If this is your first time uploading a pricing file to the Catalogue you selected, you will get a message saying the upload was complete. Click on the OK button to finish.

- **NOTE: If you are uploading an existing Catalogue with a new pricing profile, you will receive a pop-up box asking if you wish to overwrite the date already in the Catalogue. If you answer yes, it will delete all of the data in the Catalogue and replace it with the data in the pricing file you are attempting to upload.**

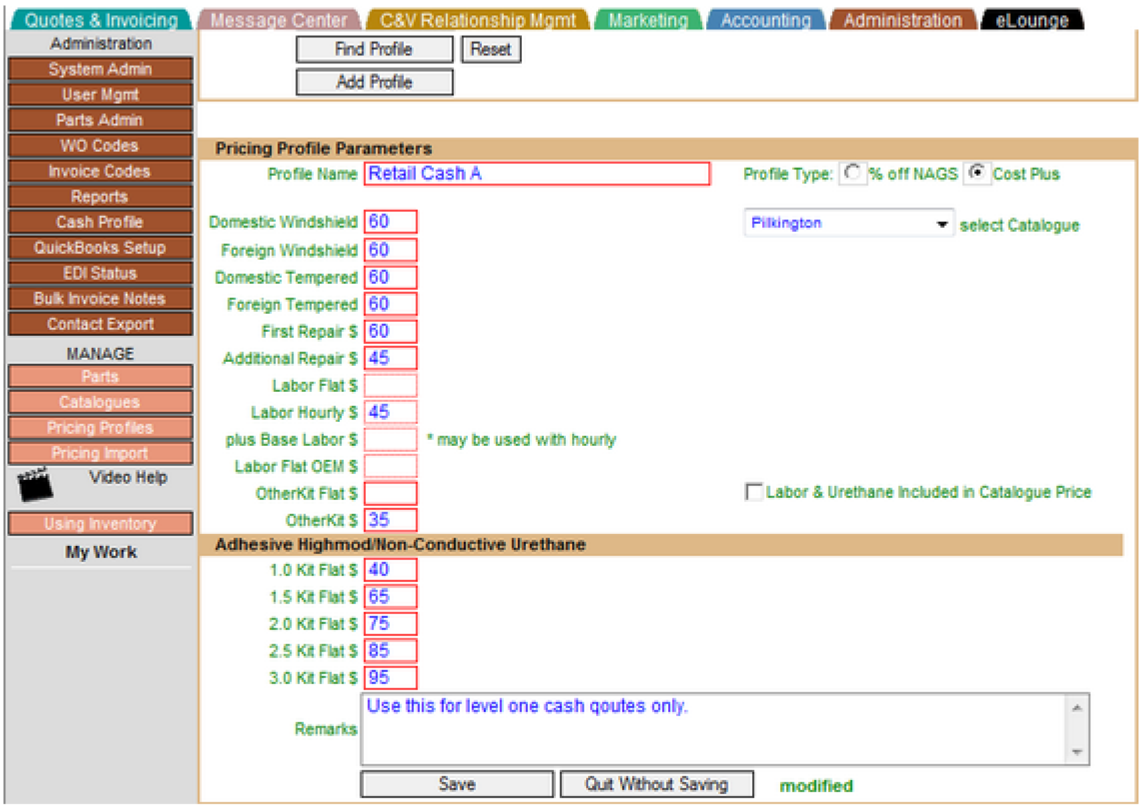


1.10.5.5 Pricing Profiles

Before you can create a Cost Plus Pricing Profile, you must have created a pricing Catalogue and uploaded the pricing file from your supplier to that Catalogue or you must be enrolled in the eDirectGlass Supplier Live Cost Plus Pricing program. You may also create pricing profiles based on the NAGS pricing, but it is only available to price at a percentage based price.

1. To create a Pricing Profile, click on Administration, Parts Admin, click on the Pricing Profiles button.
2. On the Pricing Profile Management screen, click on the Add Profile button.
3. In the Profile Name box, put in the name for the pricing profile you will refer to in the Quick Quote through Invoicing process.
4. In the Profile Type area, click on the radio box for % off NAGS, Cost Plus % or Cost Plus $ depending on the profile rules you wish to set.
5. Now select the Catalogue you wish to use for this Pricing Profile.
6. Next, input a percentage (for % off NAGS or Cost Plus %) or a dollar amount for Cost Plus $ in the Domestic and Foreign boxes. This percentage/amount will be used in conjunction with the uploaded cost (or NAGS price or Supplier Live Cost) to calculate the part price.
7. For the remaining boxes (i.e. First Repair, etc.) you may enter dollar amonts.
8. If you wish to include Labor and Kite in the price, select the check box next to Labor & Urethane Included in Catalogue Price box.

9. If you wish this profile to drive your eDirectGlass Web Quoter pricing, select the check box next to Web Quote Module box. You may only have one active Web Quote Module pricing profile at any given time.
10. You may enter notes about this pricing profile in the Remarks box.
11. When you are finished, click on the Save button.



1.10.5.6 Part Notes

When looking up NAGS* and/or related parts, the system will allow the user to review specific notes for a part that has been created in their local account.

*NAGS is the registered trademark of Mitchell International.

1.10.5.6.1 Adding Part Notes

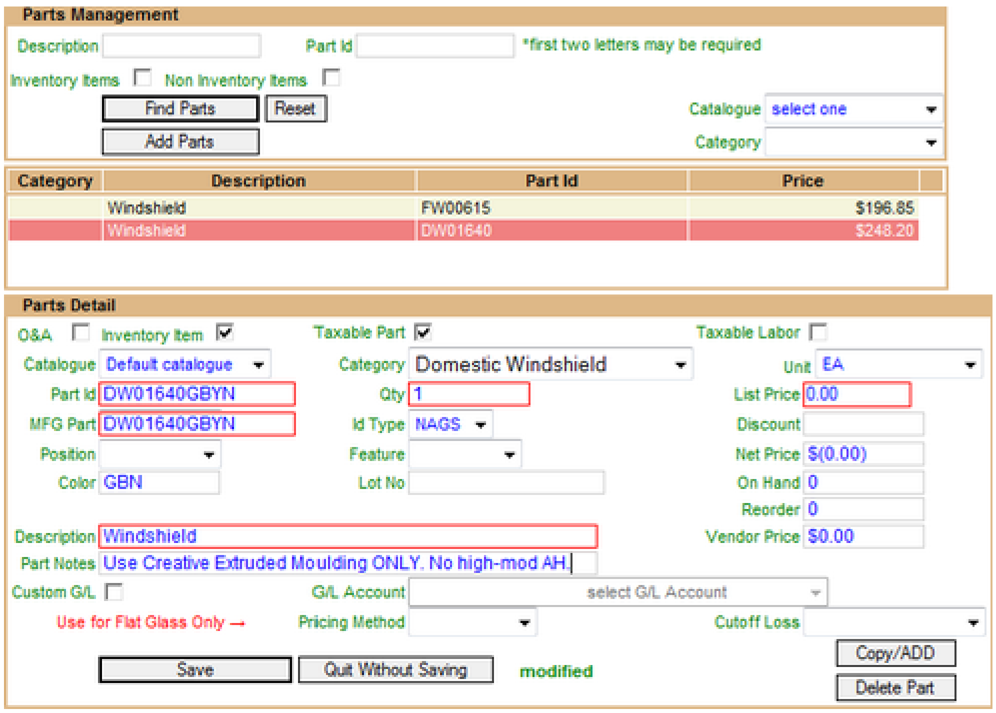
In order to add motes for a part in the system, you must add the part to your 'Default Catalogue' in the Parts Admin section.

1. Click on Administration, Parts Admin, Add Parts. For an existing part, simply click on Administration, Parts Admin, Find Parts.
2. Complete the fields that are mandatory (red boxes), select a Catalogue (Default Catalogue only) and Category from the drop downs and enter any additional information including the part notes you wish to display in the Part Notes field.

Please Note:

- You **MUST** check off the Inventory Item checkbox even if you are not going to carry the part in inventory in order for the notes to display in the system.
- The part **MUST** be added to the 'Default Catalogue' **ONLY**.

- If you are adding a NAGS part, click on the Lookup/ADD button to easily create a part in your local catalogue. Remember, you must have the fully qualified NAGS part number in both the and Part Id and MFG Part fields in order for the system to properly display the Part Notes.

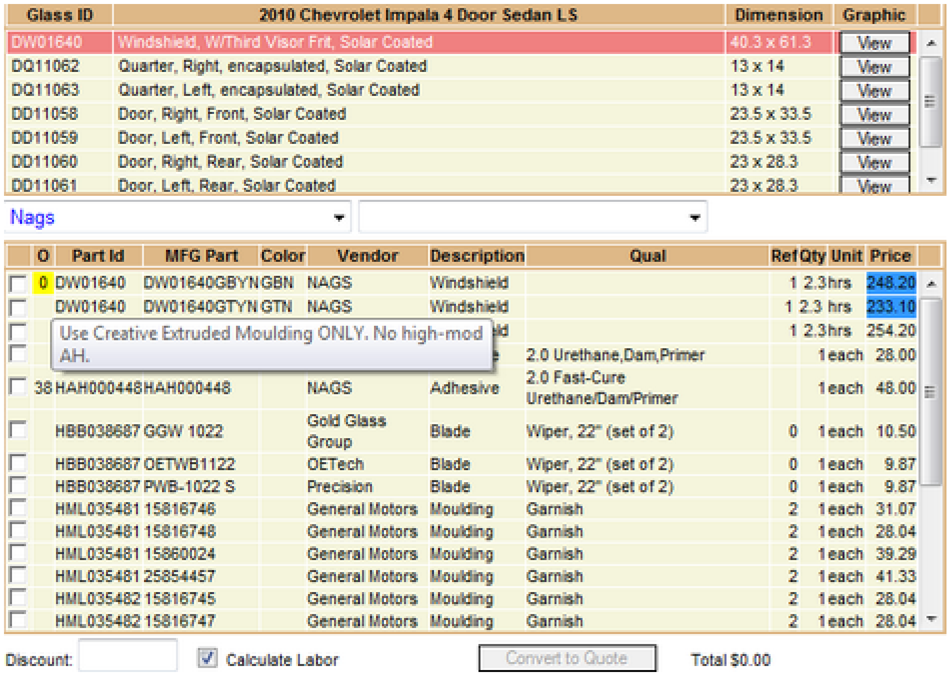


1.10.5.6.2 Displaying Part Notes

Anytime you are pulling up NAGS and related parts, you will see if a part has notes when the column labeled 'O' has a highlighted number.

For example, below you see the parts for a 2010 Chevrolet Impala, DW01640. Because we had setup the part in the previous step and included Part Notes, the lookup now alerts us with this column.

To see the notes, simply hover your mouse over the yellow highlighted area, on the part line it corresponds with, to see the Part Notes.



Glass ID	2010 Chevrolet Impala 4 Door Sedan LS	Dimension	Graphic
DW01640	Windshield, W/Third Visor Frit, Solar Coated	40.3 x 61.3	View
DQ11062	Quarter, Right, encapsulated, Solar Coated	13 x 14	View
DQ11063	Quarter, Left, encapsulated, Solar Coated	13 x 14	View
DD11058	Door, Right, Front, Solar Coated	23.5 x 33.5	View
DD11059	Door, Left, Front, Solar Coated	23.5 x 33.5	View
DD11060	Door, Right, Rear, Solar Coated	23 x 28.3	View
DD11061	Door, Left, Rear, Solar Coated	23 x 28.3	View

Nags

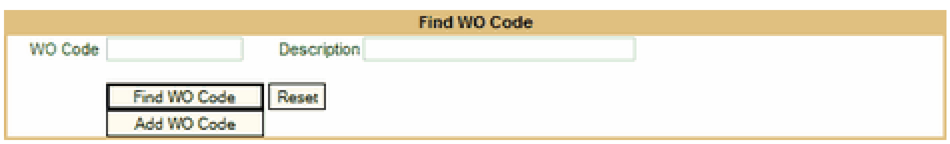
O	Part Id	MFG Part	Color	Vendor	Description	Qual	Ref	Qty	Unit	Price
0	DW01640	DW01640GBYN	GBN	NAGS	Windshield			1	2.3hrs	248.20
	DW01640	DW01640GTYN	GTN	NAGS	Windshield			1	2.3 hrs	233.10
					ld			1	2.3hrs	254.20
						2.0 Urethane,Dam,Primer		1	each	28.00
38	HAH000448	HAH000448		NAGS	Adhesive	2.0 Fast-Cure Urethane/Dam/Primer		1	each	48.00
	HBB038687	GGW 1022		Gold Glass Group	Blade	Wiper, 22" (set of 2)	0	1	each	10.50
	HBB038687	OETWB1122		OETech	Blade	Wiper, 22" (set of 2)	0	1	each	9.87
	HBB038687	PWB-1022 S		Precision	Blade	Wiper, 22" (set of 2)	0	1	each	9.87
	HML035481	15816746		General Motors	Moulding	Garnish	2	1	each	31.07
	HML035481	15816748		General Motors	Moulding	Garnish	2	1	each	28.04
	HML035481	15860024		General Motors	Moulding	Garnish	2	1	each	39.29
	HML035481	25854457		General Motors	Moulding	Garnish	2	1	each	41.33
	HML035482	15816745		General Motors	Moulding	Garnish	2	1	each	28.04
	HML035482	15816747		General Motors	Moulding	Garnish	2	1	each	28.04

Use Creative Extruded Moulding ONLY. No high-mod AH.

Discount: Calculate Labor Convert to Quote Total $0.00

1.10.6 WO Codes

The eDirectGlass system allows you to add and maintain Work Order (WO) Codes to help you keep track of your outstanding WOs and their status. To access the WO Codes section, click on the Administration button on the Menu Bar to display the Administration Sub Menu. Click on the WO Codes button in the Sub Menu to display the Find WO Code window in the Work Area.



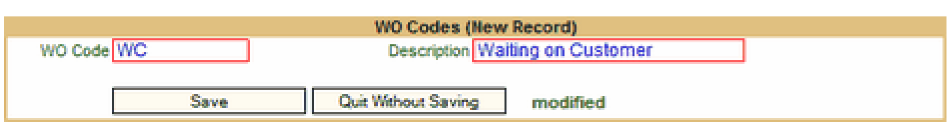
Find WO Code Window

1.10.6.1 Add WO Codes

To add a new WO Code to your eDirectGlass system, click on the Add WO Code button in the Find WO Code window to display the WO Codes (New Record) window in the Work Area.

WO Codes (New Record) Window

Fill in the appropriate WO Code (up to 12 alpha/numeric characters) and the matching description then click on the Save button to add the new WO Code to your system or click on the Quit Without Saving button if you do not wish to save this record.



Completed WO Codes (New Record) Window

1.10.6.2 View & Maintain WO Codes

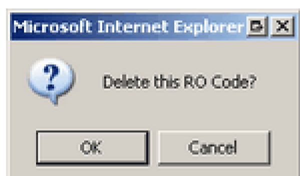
To view and maintain existing WO Codes in your system:

1. Click on the Administration button on the Menu Bar.
2. Click on the WO Codes button on the Sub Menu.
3. Click on the Find WO Code button in the Find WO Code window in the Work Area. A list of WO Codes and WO Code Descriptions will display in the Work Area

WO Code	WO Code Description
AU	verified by an Auditor
CL	Cancelled
HA	Held By Amy
HK	Held By Kelly

Find WO Code Window

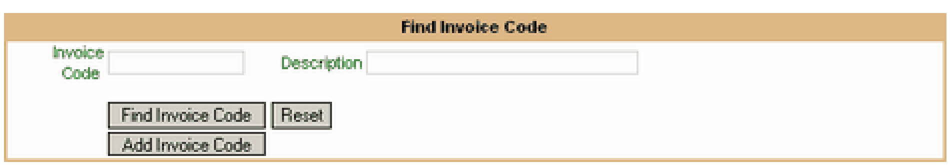
4. To edit or delete a record, click on the line then either enter your changes and click on the Save button or click on the Delete WO Code button to delete the record entirely.
5. If you click on the Delete WO Code button, a dialogue box will appear. To permanently delete the record, click on the OK button.



Delete WO Code Dialogue Box

1.10.7 Invoice Codes

The eDirectGlass system allows you to add and maintain Invoice Codes to help you keep track of your outstanding Invoices and their status. To access the Invoice Codes section, click on the Administration button on the Menu Bar to display the Administration Sub Menu. Click on the Invoice Codes button in the Sub Menu to display the Find Invoice Code window in the Work Area.



Find Invoice Code Window

1.10.7.1 Add Invoice Codes

To add a new Invoice Code to your eDirectGlass system, click on the Add Invoice Code button in the Find Invoice Code window to display the Invoice Codes (New Record) window in the Work Area.

Invoice Codes (New Record) Window

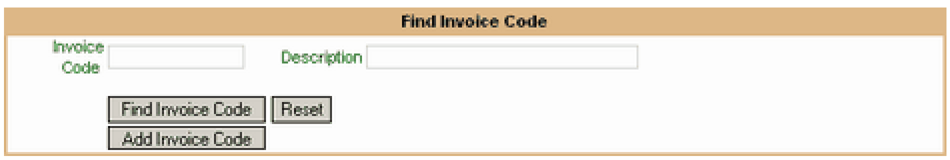
Fill in the appropriate Invoice Code (up to 12 alpha/numeric characters) and the matching description then click on the Save button to add the new Invoice Code to your system or click on the Quit Without Saving button if you do not wish to save this record.

Completed Invoice Codes (New Record) Window

1.10.7.2 View & Maintain Invoice Codes

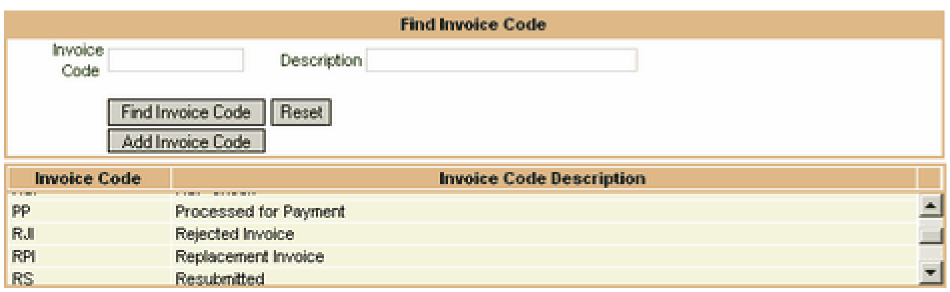
To view and maintain existing Invoice Codes in your system:

1. Click on the Administration button on the Menu Bar.
2. Click on the Invoice Codes button on the Sub Menu.
3. Click on the Find Invoice Code button in the Find Invoice Code window in the Work Area.



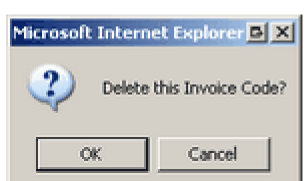
Find Invoice Code Window.

4. The list of Invoice Codes and Invoice Code Descriptions will display in the Work Area.



Invoice Code List

5. To edit or delete a record, click on the line then either enter your changes and click on the Save button or click on the Delete Invoice Code button to delete the record entirely.
6. If you click on the Delete Invoice Code button, a dialogue box will appear. To permanently delete the record, click on the OK button.



Delete Invoice Code Dialogue Box

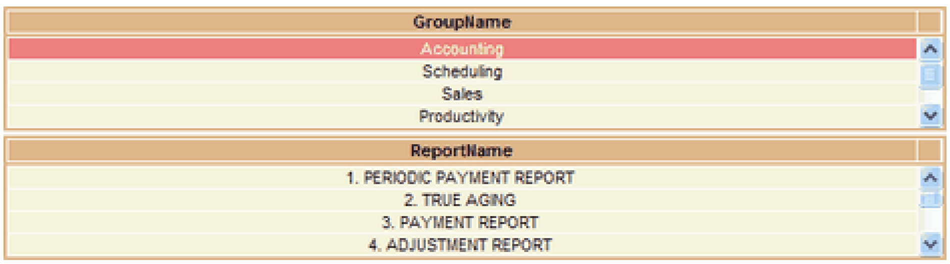
1.10.8 Reports

The eDirectGlass has a number of reports that be able to assist your company in it's day to day operations.

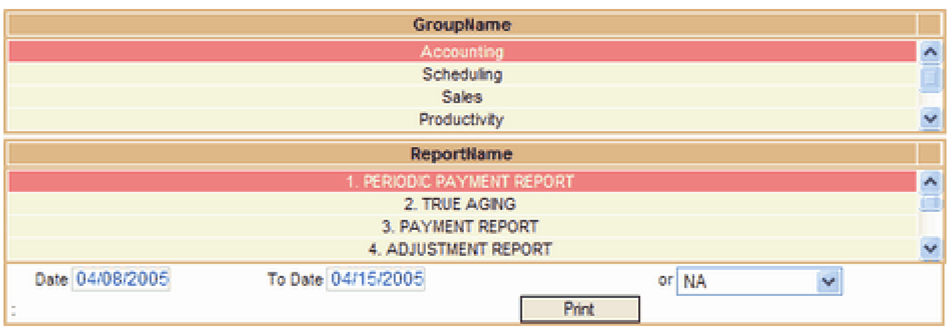
NOTE: Please make sure you follow all of the set up items under the *Installing Crystal Report Viewer* section of this manual and Print a Quote, Repair Order or Invoice before you try pulling up any of these reports.

1. To access the reports section of eDirectGlass, click on the Administration button on the Menu Bar to display the Administration Sub Menu.
2. Click on the Reports button in the Sub Menu to display the reports GroupName list.

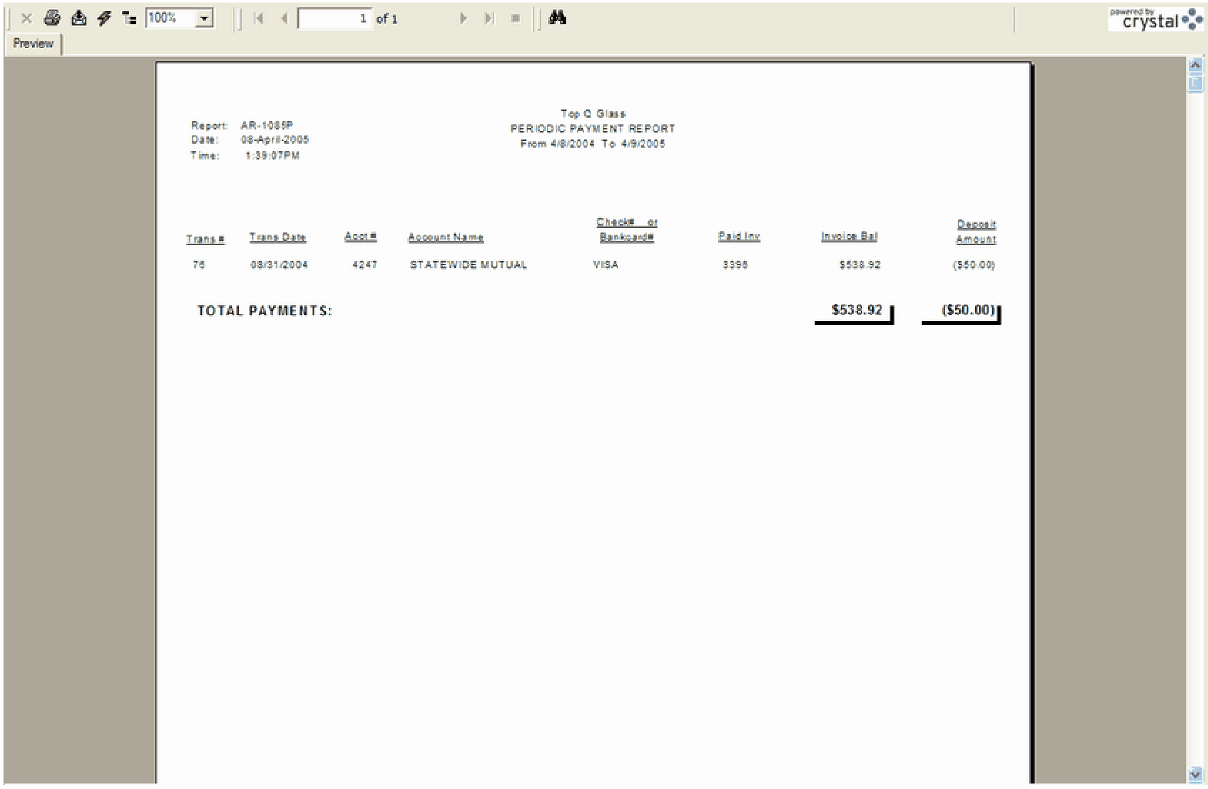
3. Select your report type from the GroupName list (i.e., Accounting, Scheduling, Sales, etc.) to display the ReportName list in the Work Area.



4. Select the report you wish to view/print from the ReportName list to display the report criteria in the Work Area.



5. Once you have entered the search criteria, click on the Print button to display the report in the Work Area.



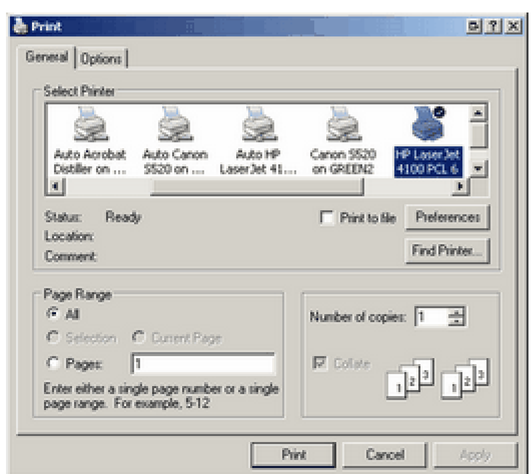
Reports Window

1.10.8.1 Printing Reports

1. With the report displayed in the Work Area, click on the icon on the report viewer toolbar located under your browser window address bar.

Report Viewer Toolbar

2. A print dialogue box will appear. Select the printer you wish to print to and click on the Print button.



Print Dialogue Box

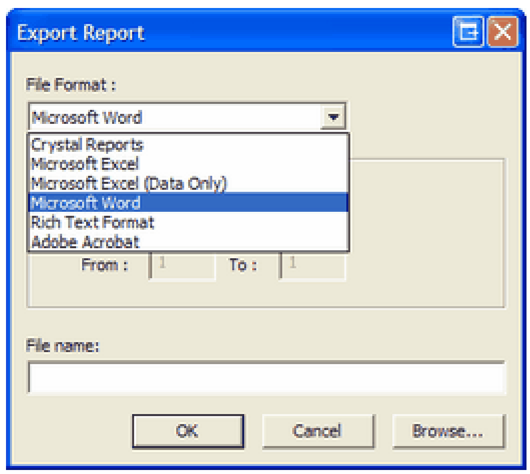
1.10.8.2 Exporting Reports

You can export any of the reports to another program to be able to further analyze your data.

1. With the report displayed in the Work Area, click on the icon on the report viewer toolbar located under your browser window address bar.

Report Viewer Toolbar

2. In the Export Report box, choose the button. From the Export Report dialogue box, choose the file format (e.g., Excel, Word) for the file export from the drop down menu.



Export Report Dialogue Box

3. Next type in the file name and location in the File Name box or click on the Browse... button to name the file and choose the location where you would like to save the file. Once you have selected a file name and location, click on the Save button.
4. When you have finished, click on the OK button to export and save the report.
5. Once the export is complete, the system will ask you if you wish to open the file. Choose either the Yes or No button.

1.10.9 QuickBooks Setup

The eDirectGlass system allows you to communicate with our existing QuickBooks company file. They system allows you to send invoices with line item detail and payment information to your company file. The QuickBooks Setup requires an eDirectGlass technician to enable and setup this feature. Please contact your eDirectGlass sales associate for pricing and to schedule your setup appointment.

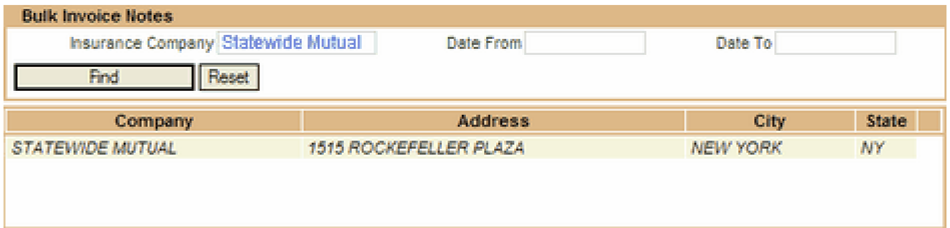
1.10.10 Bulk Invoice Notes

eDirectGlass allows you to add Invoice Notes to a range of invoices at one time.

1. Click on the Administration button on the Menu Bar to display the Administration Sub Menu.
2. Click on the Bulk Invoice Notes button to display the Bulk Invoice Notes window in the Work Area.

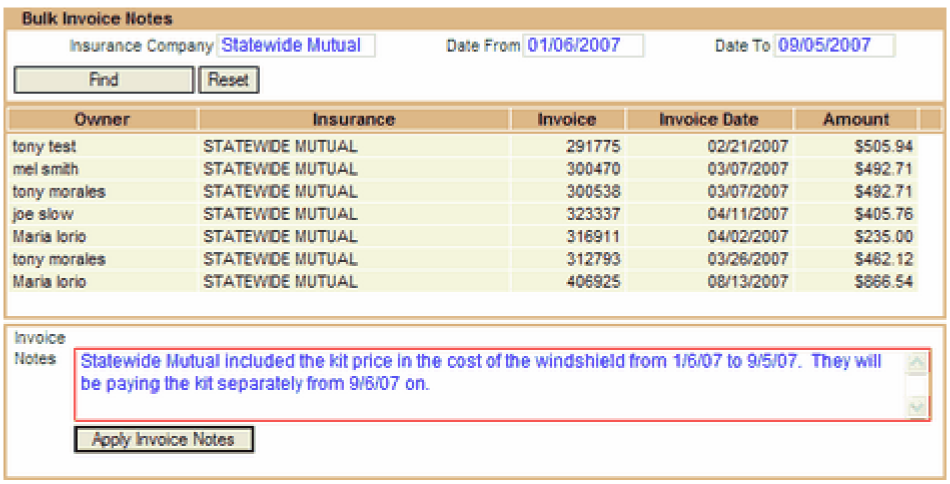
Bulk Invoice Notes Window

3. Enter your search criteria then click on the Find button to list the Insurance Company and/or date range selected.



Bulk Invoice Notes Selection Screen

4. Double click on the Insurance Company to display a list of invoices that will have the notes added to them and to display the Invoice Notes box at the bottom of the list.



Bulk Invoice Notes List

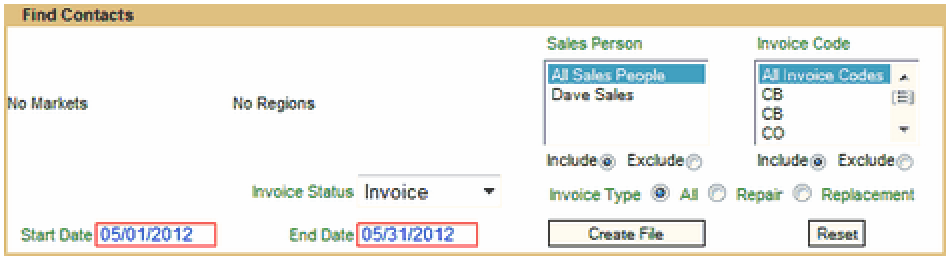
5. When you have finished creating your notes, click on the Apply Invoice Notes button to add the notes to all of the listed invoices.

1.10.11 Contact Export

eDirectGlass allows you to export your contact information for given parameters to an Excel spreadsheet for marketing/administrative purposes.

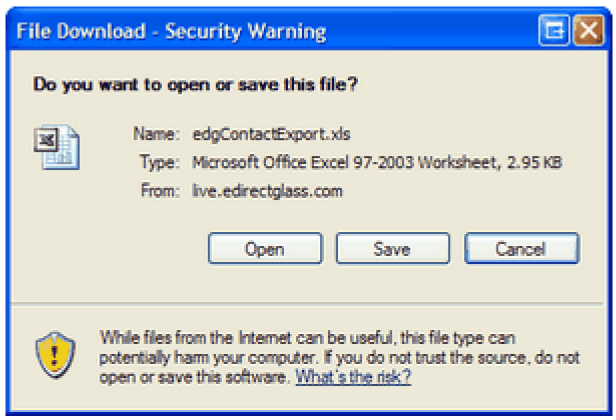
To view and maintain an existing Cash Profile in your eDirectGlass system:

1. Click on the Administration button on the Menu Bar to display the Administration Sub Menu.
2. Click on the Contact Export button to display the Contact Export parameters window in the Work Area.



Contact Export Parameters Window

3. After you have selected your export parameters, click on the Create File button.
4. The system will ask you if you wish to 'Open' or 'Save' the file. Click on the 'Save' button to save the file to your computer.

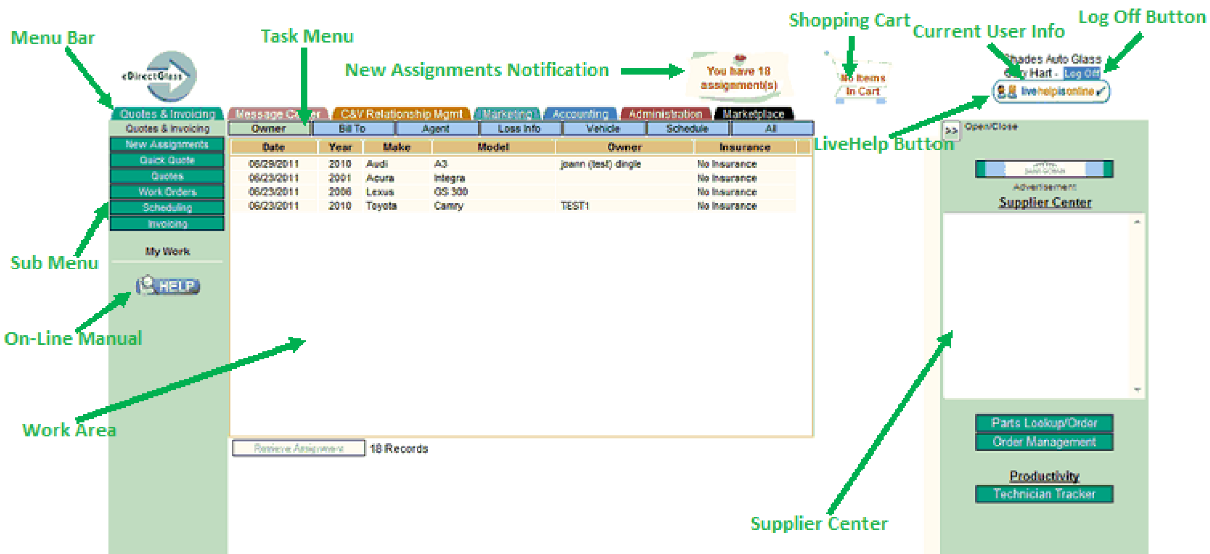


Part 2

2 eDirectGlass Basics

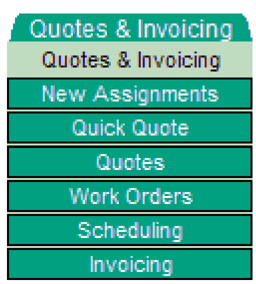
2.1 Overview

This section provides a detailed description of the elements of the eDirectGlass window. Each of the different areas of the window are clearly labeled and defined to help you later in the manual.



2.1.1 Quotes & Invoicing

Most of your time will be spent in the Quotes & Invoicing area of eDirectGlass. The Sub Menu is made up of 6 buttons, each with a specific task related to the process.



Quotes and Invoicing Sub Menu

Allows you to review new assignments that have been delivered to your account from Networks, Insurance companies and TPAs.

Allows you to lookup any vehicle and its glass components for review or instant quoting with *NAGS(TM) Parts & Pricing.

Allows you to enter new quotes or manage existing quotes.

Work Orders

Allows you to manage and schedule quotes that have been converted to Work Orders.

Scheduling

Allows you to manage your shop and technicians' production schedule.

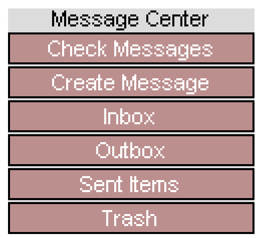
Invoicing

Allows you to create new invoices or manage repair orders that have been converted to an invoice. Also contains the functionality to submit work to your business partners electronically or manually.

*NAGS is the registered trademark of Mitchell International.

2.1.2 Message Center

The Message Center allows you to communicate directly the details of a claim with your business partners*. This feature is similar to 'Instant Messaging'; however, it is secure and can only be initiated with a claim.



Message Center Sub Menu

Check Messages

Allows you to check for 'New' messages.

Create Message

Allows you to create a 'New' message.

Inbox

Allows you to see all messages that have been sent to your account.

Outbox

Allows you to see pending messages, such as saved, unsent messages.

Sent Items

Allows you to see all messages that you have sent from your account.

Trash

Allows you to manage your Message Center trash folder, similar to the 'Recycle' bin.

*The business partner must also be an eDirectGlass user.

2.1.3 C & V Relationship Mgmt

The Customer and Vendor Relationship Management feature allows you to manage all of your customer and business partner information. This feature allows you to store information on your contacts and manage your relationships with each one.

C & V Sub Menu

Owner Contact

Manage your Owner contact records.

Insurance Contact

Manage your Insurance contacts, network delivery information and create/maintain your private O&A profiles.

Agent Contact

Manage your Agent contacts (e.g., Car Wash employees that send you referrals).

Other Contact

Allows you to create and manage other contacts such as those that provide services to you.

2.1.4 Marketing

The Marketing feature allows your organization to measure all of its marketing efforts as they relate to the work you do. Simply input the type of campaign(s) that your company is engaged in and be sure to select the applicable campaign when creating a new quote.

Marketing Sub Menu

Owner Marketing

Allows you to create and manage marketing efforts as they relate to Owners (walk-in, cash glass, etc.)

Agent Marketing

Allows you to measure your efforts in marketing and working with Agents who refer business to you.

Fleet/Ins Marketing

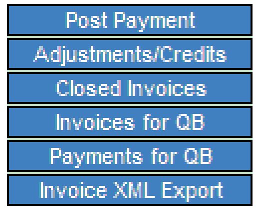
Allows you to measure your efforts with your Fleet, Insurance and TPA customers.

Marketing Reports

Contains all of the reports for each of the Marketing modules.

2.1.5 Accounting

The Accounting feature included with eDirectGlass is a basic accounts receivable application. You can use this feature to manage your accounts receivable to reduce the burden of a full or part-time accounting person.



Accounting Sub Menu

Allows you to post payments against invoices or work orders in the system.

Allows you to adjust or write-off any amounts against invoices or work orders in the system.

Allows you to view your closed/paid to $0 invoices.

Allows you to select invoice to send to your QuickBooks file.*

Allows you to select Payments/Adjustments/Credits to send to your QuickBooks file.*

Allows you to select invoices to create an file to export invoice data to be imported into your accounting system.

*The QuickBooks export feature is an available add-on for your eDirectGlass account and requires a set up.

Part 3

3 Quotes & Invoicing

This chapter provides instructions for working with new assignments, quotes, repair orders and invoices. In addition, this chapter also covers production scheduling and advanced usage techniques.

In each of the Sub Menu features in this module, the following Task Menu will appear when working with a claim:

Quoting & Invoicing Task Menu

Owner

Displays all of the Owner information both commercial and insured owned.

Bill To

Displays the Insurance or Fleet information, if any, for the claim.

Agent

Displays Agent or TPA information if this was an Assignment sent through the eDirectGlass system by an Agent or TPA. Otherwise, you may use it in conjunction with the Agent Contact records in the C&V Relationship Management module to track your referrals. You would also apply any Commissions & Writers that you may have set up under User Mgmt on this panel.

Loss Info

Displays the Loss information with regards to the claim.

Vehicle

Displays the Vehicle information including the parts and pricing information.

Schedule

Displays the Schedule information for the claim.

All

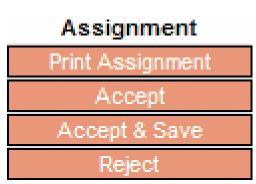
Displays all of the previous Task Menu items in one screen view that is collapsible.

3.1 New Assignments

The New Assignments feature is where you will find any assignments that have been sent to your company by Insurance, Fleet or TPA companies. Here you can choose to review, accept or reject any of these assignments. If you are an eDirectGlass Web Quoter customer, your website quotes will also display under New Assignments.

New Assignment Sub Menu

When you select or are reviewing an assignment, the following Sub Menu will become active in the Sub Menu area:



New Assignment Sub Menu

Allows you to print all of the Assignment information.

Allows you to accept the assignment and immediately convert it to a Repair Order to make changes to the record.

Allows you to accept the assignment and convert it to a Work Order for later completion.

Allows you to reject an assignment. A message box will display where you must enter a reason for rejecting the assignment. This information will not be sent back to the issuing party.

3.1.1 Review Assignments

eDirectGlass will notify you in the top center of the screen when New Assignments come in. Once you see the notification, follow the steps below to review and handle those records.

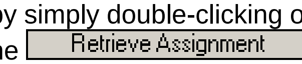
After selecting the 

button, a list of assignments both new and previously read (however, if the assignment has been accepted, it will no longer be listed here, but under Work Orders) are displayed in the Work Area.

Date	Year	Make	Model	Owner	Insurance
01/08/2004	2003	Chrysler	Concorde	Manny Thomas	STATEWIDE MUTUAL
01/28/2004	2004	Lincoln	Aviator	Cori Rooney	First Insurance of Garyland

Retrieve Assignment 2 Records

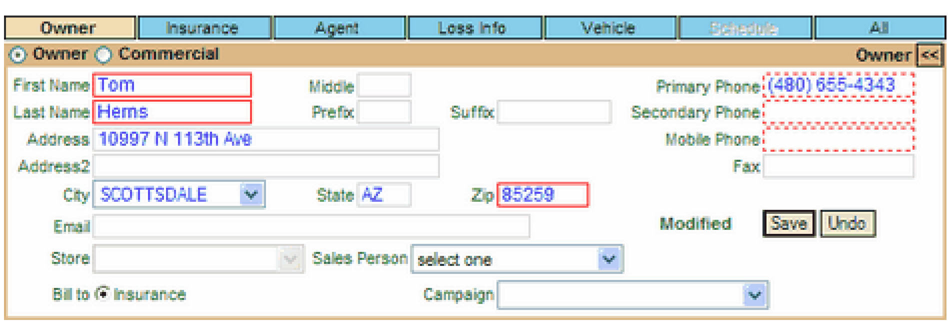
New Assignments List Window

You can open any one of the assignments in the list by simply double-clicking on an assignment line or single-clicking to highlight the line and then click on the 

button.

Reviewing Assignment

After the assignment is opened, you will see the assignment information in the Work Area and the Task Menu will become active.



Assignment Review with Active Task Menu

Clicking on each one of the Task Menu items will display the information as it pertains to each menu item. This feature allows you to review the assignment information before making a decision to either accept or reject the assignment.

3.1.2 Accept Assignment

When you are ready to accept an assignment, you have two choices: Accept or Accept & Save.

Accept

When you click on the Accept button, the Assignment will immediately be converted to a Work Order and you will be taken directly into the Work Order work area where you can build a parts list from OEM or NAGS listed parts.

Accept & Save

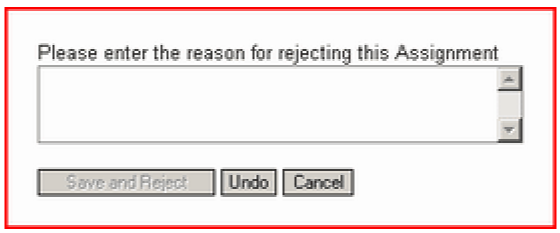
When you click on the Accept & Save button, the Assignment will be saved as a Work Order where you can work on it at a later time from the Work Order feature.

3.1.3 Reject Assignment

If for some reason you do not want the Assignment, you can click on the Reject button.

After you click the button, the Reject Reason alert box will appear. You must enter a reason as to why you are rejecting the Assignment. After you have entered a reason, click on the Save and Reject button and the claim will be rejected.

If you DO NOT want to reject the assignment, simply click on the Cancel button.



Reject Reason Alert Box

<u>NOTE:</u> This information will not be sent back to the issuing party, this is information will only be saved in the eDirectGlass database. You will need to contact the issuing party (TPA, Insurance Company, etc.) to reject this job with them.

3.1.4 Show O&A Rules

While you are reviewing the Assignment record, if you want to see what Offer and Acceptance rules apply to the Assignment, you can click on the Show O&A Rules button and the O&A Parameters, if any, will display in the Work Area. When you are finished reviewing the rules, click on Close button.

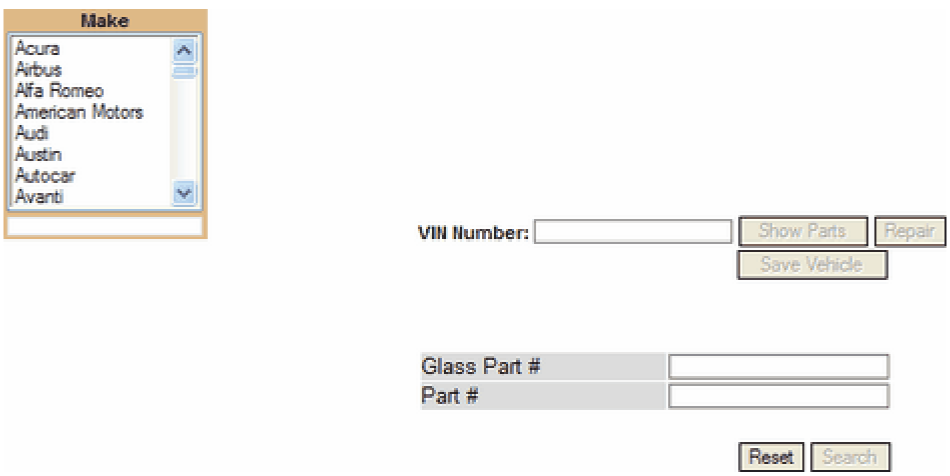
O&A Parameters for Statewide Mutual	
Domestic Windshield	40%
Foreign Windshield	40%
Domestic Tempered	40%
Foreign Tempered	40%
First Repair	$50.00
Additional Repair	$35.00
Labor Flat	$0.00
Labor Hourly	$35.00
Other Kit Flat	$30.00
Adhesive Highmod/Non-Conductive Urethane	
1.0 Kit Flat	$45.00
1.5 Kit Flat	$55.00
2.0 Kit Flat	$65.00
2.5 Kit Flat	$70.00
3.0 Kit Flat	$90.00
Remarks	
Please contact program administrator for further pricing details for misc. parts.	

Close

O&A Parameters Screen

3.2 Quick Quote

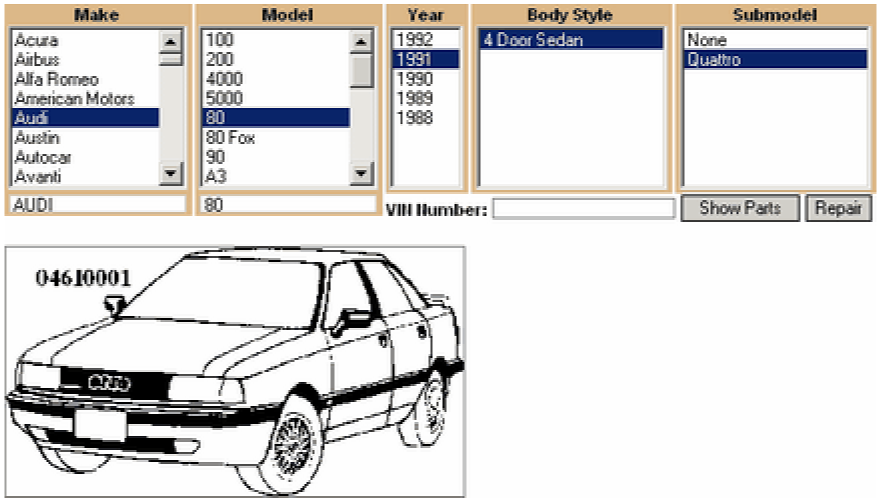
The Quick Quote feature allows you to quickly review vehicle parts graphics and parts pricing. When you click on the Quick Quote button, the Lookup Vehicle window appears in the Work Area.



Quick Quote Lookup Vehicle Window

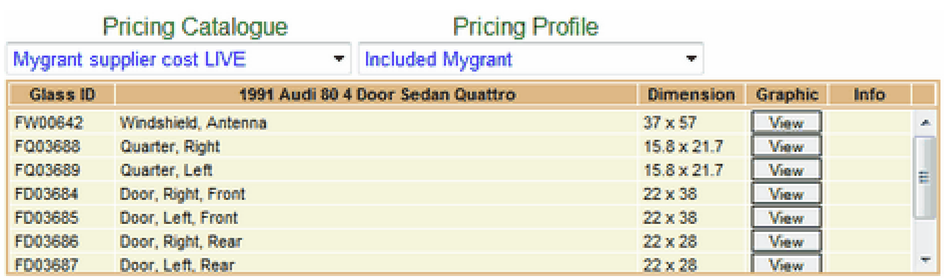
If you have a VIN Number, enter it into the VIN Number Box. The system will automatically decode the VIN and build the vehicle. The vehicle may not build out all the way and you may have to select additional vehicle information before the Show Parts button becomes visible. If there is an issue translating the VIN to the NAGS* breakdown, the eDirectGlass system will display for you the decoded VIN information and you can simply select the correct corresponding information for the vehicle in question.

If you do not have a VIN Number, you can simply select a Make, Model, Year, Body Style and Submodel instead.



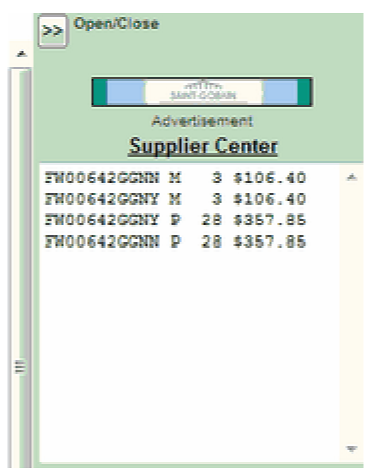
Complete Vehicle Build for Quick Quote

When you are ready, you can click on the Show Parts button to work with the NAGS graphics and parts pricing. Once you click on the Show Parts button, you will be taken to the glass part list. At the top of the list will display any Pricing Catalogue and Pricing Profiles you may have set up under Administration. Selecting from the appropriate drop downs prior to clicking on the glass part, will apply those pricing rules to the prices displayed on the Quick Quotes screen.



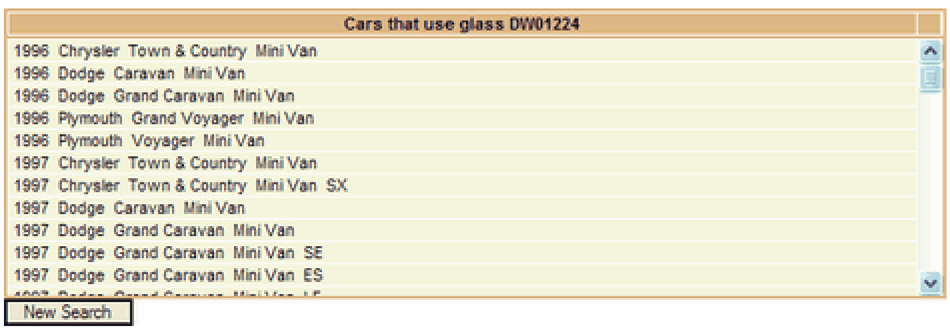
Glass ID	1991 Audi 80 4 Door Sedan Quattro	Dimension	Graphic	Info
FW00642	Windshield, Antenna	37 x 57	View	
FQ03688	Quarter, Right	15.8 x 21.7	View	
FQ03689	Quarter, Left	15.8 x 21.7	View	
FD03684	Door, Right, Front	22 x 38	View	
FD03685	Door, Left, Front	22 x 38	View	
FD03686	Door, Right, Rear	22 x 28	View	
FD03687	Door, Left, Rear	22 x 28	View	

Also, if you have set up your supplier usernames and passwords under Administration - System Admin, once you click on the glass part, the system will search all of the suppliers you have provided login information for and display your real time pricing and availability with those suppliers in the Supplier Center. M = Mygrant, P = Pilkington and W = PGW.



When the sub-parts list is displayed, any parts that are found in your pricing Catalogue (or matched with a Supplier Live Cost Plus Pricing profile) will be shown with the Price highlighted in the color blue and in the Vendor column, it will display the name of the Pricing Profile used to calculate the price.

You can also look up glass part by the NAGS part number to see which vehicles use that part. Simply enter the glass part number in the 'Glass Part #' field and click on Search button to view the associated parts.

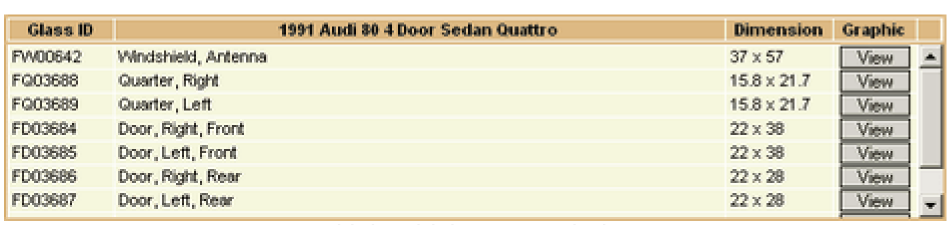


Glass Part # Associated Vehicles Lookup

*NAGS is the registered trademark of Mitchell International.

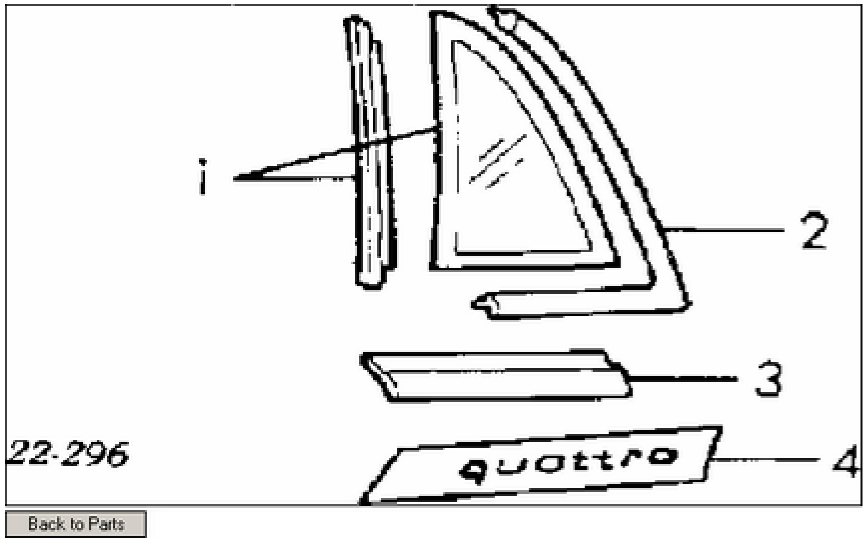
3.2.1 Working with a NAGS Lookup

After you have clicked on the Show Parts button, the Vehicle Parts window will appear in the Work Area. Before you select the Glass Part,



Initial Vehicle Parts Window

From this display box, you can click on any one of the line items to display the sub menu of components for that specific part. If available, you can also click on the View button to review the part graphic.



Part Graphic

To return to the Vehicle Parts display box, click on the Back to Parts button.

3.2.2 Converting a Lookup to a Quote

From the Lookup NAGS parts sub menu, you can select parts to build a rough price estimate. As you select the parts, by clicking on the empty check box of each required line item, a total will appear at the bottom of the sub menu.

You can also apply a discount to the checked parts, by entering in a percentage in the Discount: box. This discount will only apply to the items selected and will not be applied to labor, which is not a part of the Lookup NAGS Total.

NOTE: This discount should only be applied to a Quote that *will not* be paid by an Insurance company, Fleet company or TPA.

In addition to the total, the Convert to Quote button will appear.

If you wish to convert the NAGS lookup to a Quote, simply click the Convert to Quote button and you will be taken to the Quotes feature to complete the process. Any discounts you have entered in the Discount: box will be carried over to the Quote.

Glass ID	1991 Audi 80 4 Door Sedan Quattro	Dimension	Graphic
FW00642	Windshield, Antenna	37 x 57	View
FQ03688	Quarter, Right	15.8 x 21.7	View
FQ03689	Quarter, Left	15.8 x 21.7	View
FD03684	Door, Right, Front	22 x 38	View
FD03685	Door, Left, Front	22 x 38	View
FD03686	Door, Right, Rear	22 x 28	View
FD03687	Door, Left, Rear	22 x 28	View
FB03690	Back Window, Quattro, Heated	35.3 x 51.5	View
FB03814	Back Window, Antenna, Heated	35.3 x 51.5	View

	Part Id	MFG Part	Color	Vendor	Description	Qual	Ref	Qty	Unit	Price
☑	FW00642	FW00642GGNN	GGN	NAGS	Windshield		1	3.5	hrs	834.85
☐	FW00642	FW00642GGNY	GGY	NAGS	Windshield		1	3.5	hrs	1,045.65
☐	FW00642	893 845 099 K	GGN	Audi-Volkswagen	Windshield		1	3.5	hrs	315.18
☐	HAH000004	HAH000004		NAGS	Adhesive	2.0 Urethane,Dam,Primer		1	each	28.00
☑	HAH000448	HAH000448		NAGS	Adhesive	2.0 Fast-Cure Urethane/Dam/Primer		1	each	48.00
☐	HCR000172	893 853 367 E 2ZZ		Audi-Volkswagen	Cover	Chrome, Joint	0	1	each	5.88
☐	HCR000173	893 853 367 F 01C		Audi-Volkswagen	Cover	Black, Joint	0	1	each	0.92
☐	HML006980	893 845 121 G		Audi-Volkswagen	Moulding	Rubber	0	1	each	48.33
☐	HML006981	893 867 232 R01		Audi-Volkswagen	Moulding	Inner, Garnish	0	1	each	42.15
☐	HML006983	893 867 231 R01		Audi-Volkswagen	Moulding	Inner, Garnish	0	1	each	41.50
☐	HML008098	DK926		Dorcas & Kalam	Moulding		0	1	each	53.60
☐	HML008098	DK927		Dorcas & Kalam	Moulding		0	1	each	132.36
☐	HML008098	WKT 586 B		Precision	Moulding		0	1	each	47.38
☐	HML008098	WKT 586 C		Precision	Moulding		0	1	each	115.21
☐	HMR000484	443 857 511 01C		Audi-Volkswagen	Mirror	Rear, View	0	1	each	13.30
☐	HPL000204	4A0 845 543		Audi-Volkswagen	Plate	Retainer, Mirror	2	1	each	13.35
☐	HSC000418	443 845 237 B		Audi-Volkswagen	Spacer	Upper (set of 4)	3	1	each	0.58
☐	HSC000419	443 845 237 D		Audi-Volkswagen	Spacer	Lower (set of 3)	4	1	each	1.20
☐	HWE000002	443 845 631 A		Audi-Volkswagen	Wedge		5	1	each	1.20

Discount: 85% Convert to Quote Total $132.43

Lookup NAGS Line Item Build

3.3 Quotes

This eDirectGlass feature allows you to create and manage quotes. In every case, you must create a quote before you can create a Repair Order and Invoice.

When you click the Quotes button, the following Sub Menu will appear:

Quote

New Quote

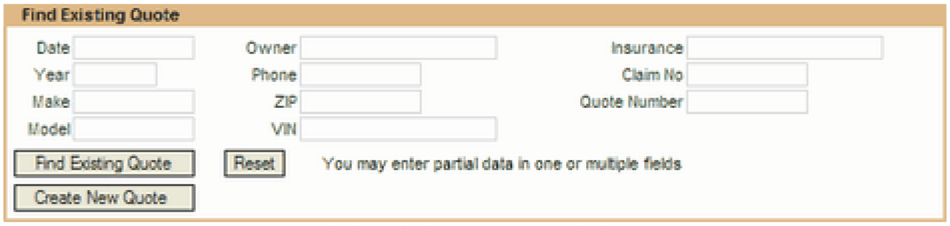
Initial Quotes Sub Menu

New Quote

The New Quote button will take you to the New Owner Record screen in the Work Area where you can build your quote.

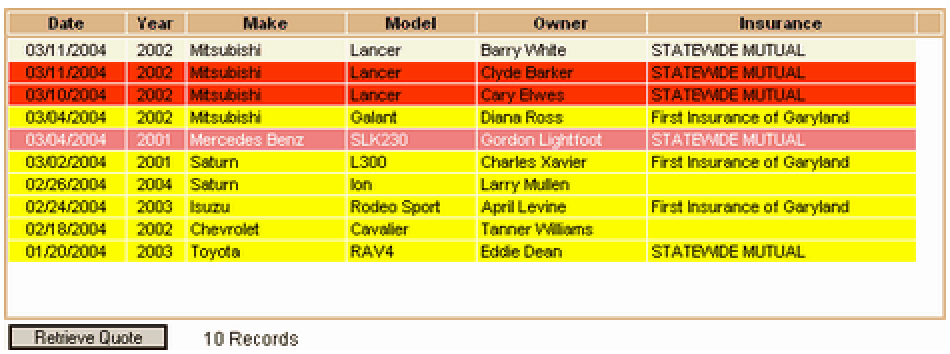
3.3.1 Quote Lookup

When you click on the Quotes button from the Sub Menu, the Find Existing Quote window is displayed in the Work Area.



Find Existing Quote Window

- In this box, you can enter any data, in any combination, to find an existing quote. Once you have entered your search data, simply click on the Find Existing Quote button. If the search finds items that match your search data, those quotes will be displayed in the Work Area.
- If you want to reset your search data for a new search, click on the Reset button.
- If you want to create a new quote, you can click on the Create New Quote button in the Find Existing Quote window or click on the New Quote button in the Sub Menu.
- To retrieve a Quote, simply double-click on a quote line in the Work Area or single-click the line and click on the Retrieve Quote button.



Date	Year	Make	Model	Owner	Insurance
03/11/2004	2002	Mitsubishi	Lancer	Barry White	STATEWIDE MUTUAL
03/11/2004	2002	Mitsubishi	Lancer	Clyde Barker	STATEWIDE MUTUAL
03/10/2004	2002	Mitsubishi	Lancer	Cary Elwes	STATEWIDE MUTUAL
03/04/2004	2002	Mitsubishi	Galant	Diana Ross	First Insurance of Garyland
03/04/2004	2001	Mercedes Benz	SLK230	Gordon Lightfoot	STATEWIDE MUTUAL
03/02/2004	2001	Saturn	L300	Charles Xavier	First Insurance of Garyland
02/26/2004	2004	Saturn	Ion	Larry Mullen	
02/24/2004	2003	Isuzu	Rodeo Sport	April Levine	First Insurance of Garyland
02/18/2004	2002	Chevrolet	Cavalier	Tanner Williams	
01/20/2004	2003	Toyota	RAV4	Eddie Dean	STATEWIDE MUTUAL

Retrieve Quote 10 Records

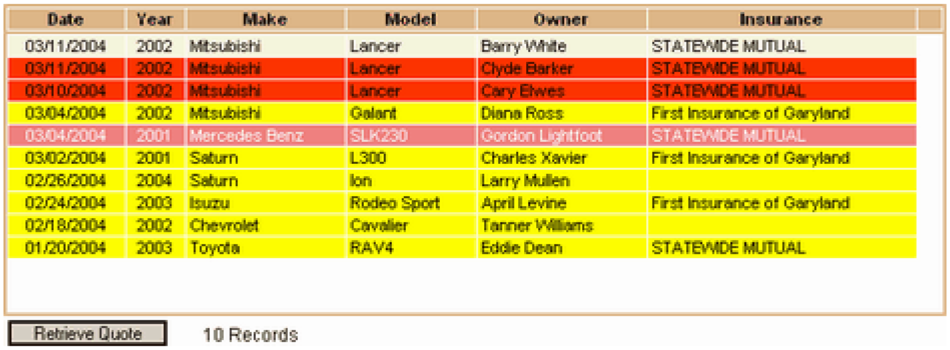
Quotes Retrieve Window

3.3.1.1 Quotes List Color Coding

Note: The Quote Retrieve window is color coded for easy identification of items that require attention.

- Red - indicates all Assignments that have been received by your shop from an Insurance Company or TPA/Agent through the eDirectGlass system (came in under the New Assignments module) and are less than 7 days old.

- Yellow - indicates items (Assignments and/or regular quotes) that are older than 7 days.



Date	Year	Make	Model	Owner	Insurance
03/11/2004	2002	Mitsubishi	Lancer	Barry White	STATEWIDE MUTUAL
03/11/2004	2002	Mitsubishi	Lancer	Clyde Barker	STATEWIDE MUTUAL
03/10/2004	2002	Mitsubishi	Lancer	Cary Elwes	STATEWIDE MUTUAL
03/04/2004	2002	Mitsubishi	Galant	Diana Ross	First Insurance of Garyland
03/04/2004	2001	Mercedes Benz	SLK230	Gordon Lightfoot	STATEWIDE MUTUAL
03/02/2004	2001	Saturn	L300	Charles Xavier	First Insurance of Garyland
02/26/2004	2004	Saturn	Ion	Larry Mullen	
02/24/2004	2003	Isuzu	Rodeo Sport	April Levine	First Insurance of Garyland
02/18/2004	2002	Chevrolet	Cavalier	Tanner Williams	
01/20/2004	2003	Toyota	RAV4	Eddie Dean	STATEWIDE MUTUAL

Retrieve Quote 10 Records

Quotes List

3.3.2 Create a New Quote

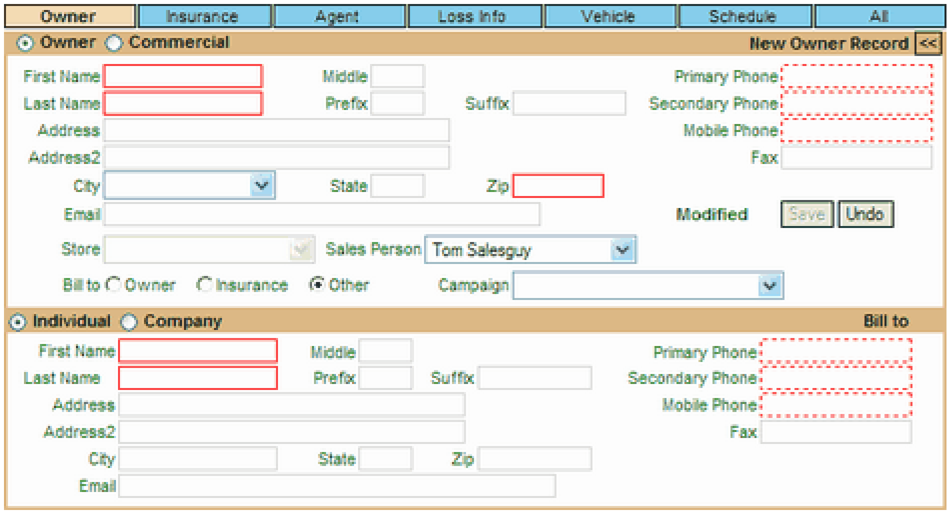
To create a New Quote, click on the Quotes button from the Sub Menu and then click on the New Quote button in the Sub Menu or click on the Create New Quote button in the Find Existing Quote window.

3.3.2.1 Entering Owner Information

The New Owner Record window will display in the Work Area.

New Owner Record Window

1. Choose whether this is an Owner Record or a Commercial Record by selecting the appropriate radio box.
2. Enter all of the contact information. If this is an Owner Record, First and Last names are required, as indicated by the solid red boxes. Commercial Records require the Company Name.
3. You must enter the owner's zip/postal code and then ***tab out*** of this field. The eDirectGlass system will automatically fill in the City and State based on the zip/postal code information. **Note: The Save button will not be active if the zip/postal code field is not filled out.**
4. Enter at least one telephone number, as indicated by the dotted-line red boxes.
5. Select the Sales Person responsible for the job from the Sales Person drop down list, if required.
6. Select the appropriate 'Bill to' information (Owner, Insurance, Other) by selecting the appropriate radio box. If you choose "Other" as the 'Bill to', a second screen will appear in which you must add the appropriate bill to information.



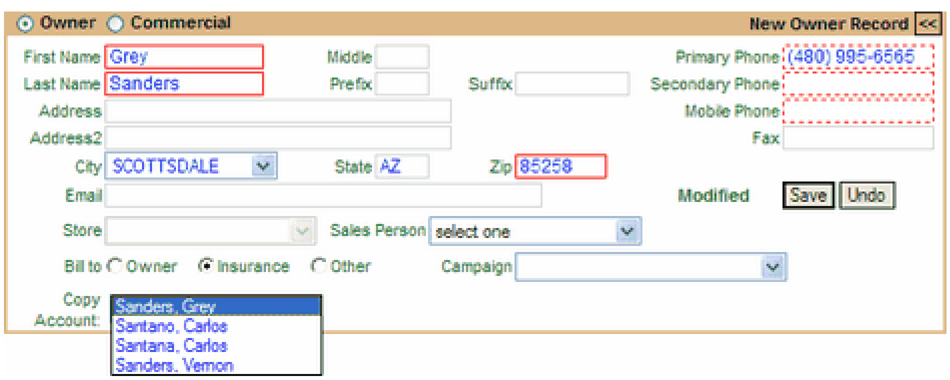
New Owner Record Window - Bill To Other

7. If you have setup any Marketing Campaigns, you can use the drop down box to select the appropriate campaign. (*See Section 6, Marketing, of this manual for assistance with this module)*
8. When you are satisfied with the information entered, click on the Save button.
9. Next you will be taken to the Insurance screen on the Task Menu.

3.3.2.1.1 Copy Account

If you are creating a Quote for an existing customer, you can pull up the customer's information and use that to create your new quote.

In the Last Name field (or the Company Name field if the record is a commercial account), type in the first three letters of the last name and at the bottom of the screen the 'Copy Account' drop-down field will appear.



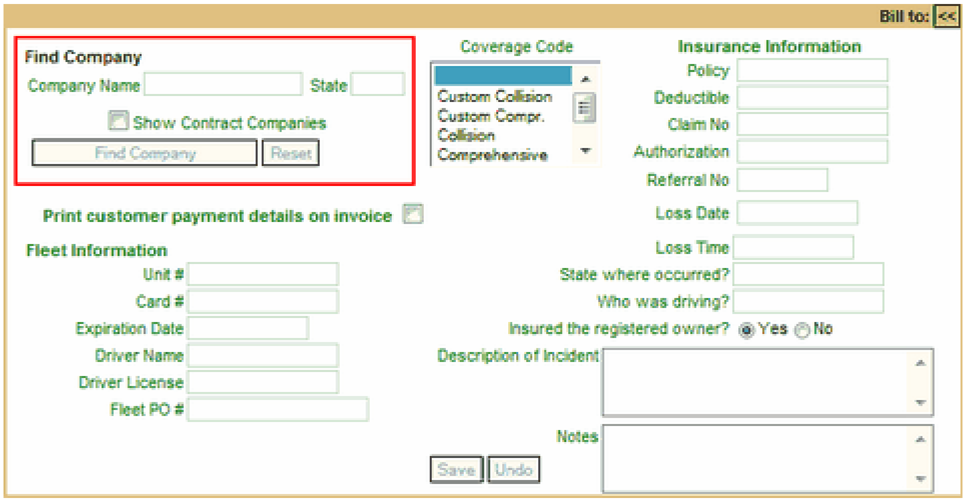
Copy Account Drop-Down

Simply choose the correct customer from the drop-down list and the appropriate fields will be filled in then click on the Save button to continue.

NOTE: If you have selected a record in error, it is extremely important to leave the Quote Owner screen without changing or saving any information. It is possible to overwrite the existing customer information and change historical records for that customer.

3.3.2.2 Entering Bill To Information

Once the New Owner Record is created, you will be brought to the Bill To window on the Task Menu.

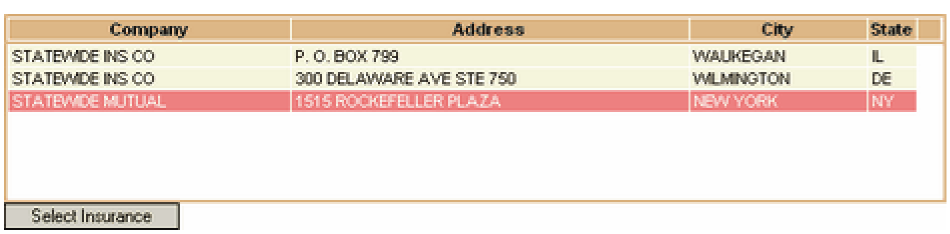


Bill To Task Menu Window

Note: You do not have to enter any Insurance information. You can move to any tab on the Task Menu at any time. If you selected Bill To of Owner or a Bill To of Other on the Owner tab, the system automatically assigns "No Insurance" to this claim. If this is incorrect, you will need to go back to the Owner tab, select a Bill To of Insurance, click on the Save button, then return to the Insurance tab and follow the instructions under the "Change Insurance Company" section of this manual.

Quotes and Invoicing Task Bar

1. Start by selecting an Insurance Company. To do this, enter the name of the Insurance company (or at least the first three letters of the Insurance company's name) or the Insurance company's state in the Find Insurance Company box. **NOTE:** If you check off the Show Contract Companies box, it will only display the list of matching Insurance Companies for which you have set up both a C&V Relationship Mgmt Record and an O&A Profile. This is help to ensure that the Insurance Company you are selecting on the Bill To tab of the Quote is the same one that has the Network correctly selected and will prevent billing delays by helping avoid records that are accidentally submitted to the printer and not sent electronically.
2. Click on the Find Insurance Company button once you have the Company Name or State information typed in.
3. In the Insurance Company Find list, select the correct Insurance Company by either double-clicking that line or single-clicking the line to highlight it and then clicking on the Select Insurance button.



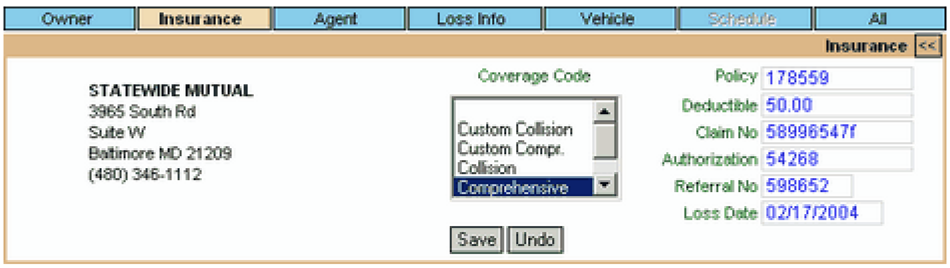
Company	Address	City	State
STATEWIDE INS CO	P. O. BOX 799	WAUKEGAN	IL
STATEWIDE INS CO	300 DELAWARE AVE STE 750	WILMINGTON	DE
STATEWIDE MUTUAL	1515 ROCKEFELLER PLAZA	NEW YORK	NY

Insurance Company Selection List

4. Now complete the Insurance record by selecting a Coverage Code, Policy Number, Deductible, Claim No, Authorization, Referral No and Loss Date. Don't worry, if you don't have all or any of this information, you can always enter it later. If you do enter information, make sure to click on the Save button. The system will move you to the next Task Menu tab.

   NOTE: The Safelite Referral number from the Safelite fax should be entered in both the Claim No and Referral No fields. The insurance PID which is located in the insurance information section of the Safelite Referral fax (this number is 5 digits long and usually begins with 09) needs to go in the Authorization box. The LYNX, Quest & Harmon authorization numbers only need to go in the Authorization field.

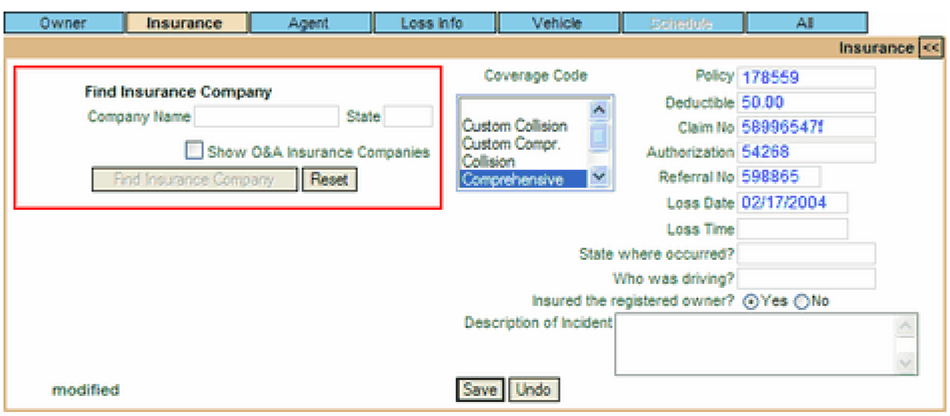
5. If you did not enter any information, select the next tab you wish to work on from the Task Menu.



Insurance Task Menu Detail

3.3.2.2.1 Change Insurance Company

If for some reason you need to change the insurance company that was originally selected, click on the Change Insurance button in the Quotes Sub Menu to display the Find Insurance Company look up again. Make your new selection and click on the Save button.



Insurance Task Menu Window - Change Insurance

NOTE: You can change the Insurance Company information at any point in the process (Quoting, WO and Invoicing) as long as the invoice has not been submitted. If the assignment has come directly from an insurance company through the eDirectGlass system, you will not have the option to make changes to the Insurance Company associated with the claim. You are, however, able to update/change the policy information at anytime before submission of the invoice.

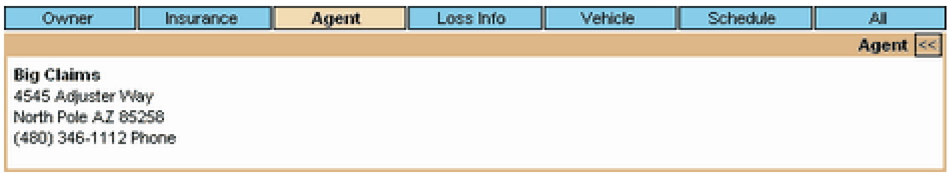
3.3.2.3 Agent Information

When an assignment is received from an Agency using the eDirectGlass system, you will find the Agent's information listed under the Agent tab.

If this is not an assignment from an Agency or TPA, you may use this tab (in conjunction with the Agent Contact records in the C & V Relationship Mgmt module) to track referrals sent to you from outside sources (e.g., car wash and/or oil & lube personnel).

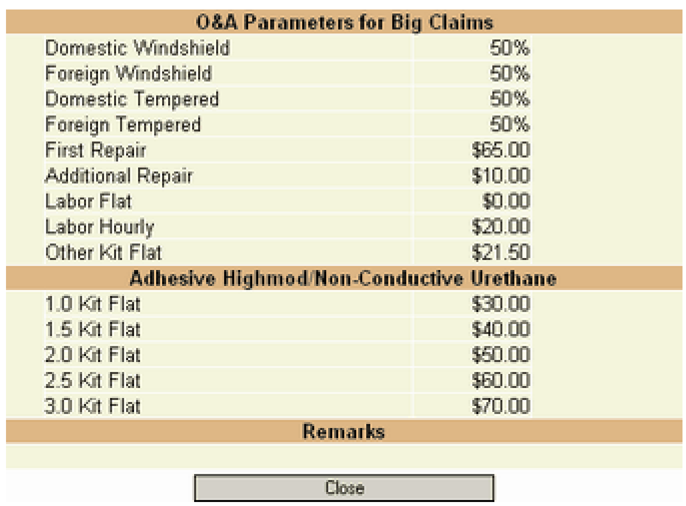
3.3.2.3.1 From Agency or TPA

When an Assignment is received from an Agency using the eDirectGlass system, you will find the Agent's information listed under the Agent tab. If an Assignment comes from an Agency, you will not be able to use this tab to assign any other Agent or referral information. You can only view the information for the Agency. You will not be able to make any changes to this information.



Agent Information Window

You can view the O&A Rules associated with this Agency, by clicking on the Show O&A Rules button in the Sub Menu. The O&A Rules will be displayed in the Work Area.



O&A Parameters for Big Claims	
Domestic Windshield	50%
Foreign Windshield	50%
Domestic Tempered	50%
Foreign Tempered	50%
First Repair	$65.00
Additional Repair	$10.00
Labor Flat	$0.00
Labor Hourly	$20.00
Other Kit Flat	$21.50
Adhesive Highmod/Non-Conductive Urethane	
1.0 Kit Flat	$30.00
1.5 Kit Flat	$40.00
2.0 Kit Flat	$50.00
2.5 Kit Flat	$60.00
3.0 Kit Flat	$70.00
Remarks	

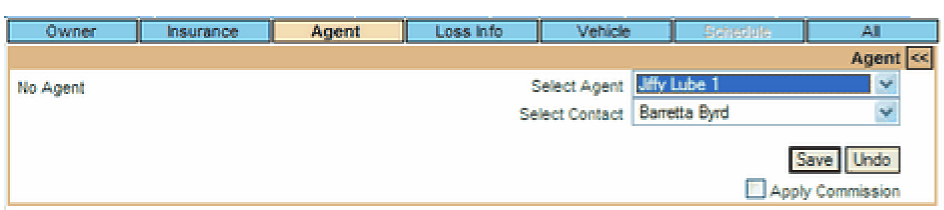
Close

Show O&A Rules Window

3.3.2.3.2 Referral Agents

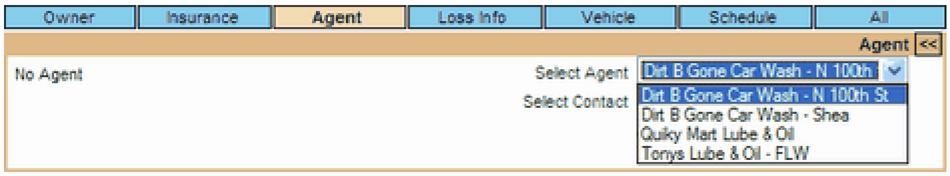
If the record you are working with did not come from an Agency or TPA through the eDirectGlass system, you may use the Agent Tab (in conjunction with the C&V Relationship Mgmt module) to track referrals from outside agents.

Note: When you click on the Save button on the Insurance tab, the system will automatically advance to the Loss Info tab. You may go back to the Agent tab now and then proceed to the Loss Info tab when you have finished or you can come back to the Agent tab later.



Agent Tab

1. Select an Agent (main location) from the Select Agent drop down list to see all of the Contacts associated with that Agent.



Agent Selection

2. Next, select the Contact from the Select Contact drop down list.

Contact Selection

3. When you have finished with your selections, click on the Save button.

3.3.2.3.3 Apply Commission

In eDirectGlass, you may enter up to three salespersons or writers to pay commissions to on any given record. On the Agent tab, check off the 'Apply Commission' box to view the Sales Commissions screen.

Sales Commissions Screen

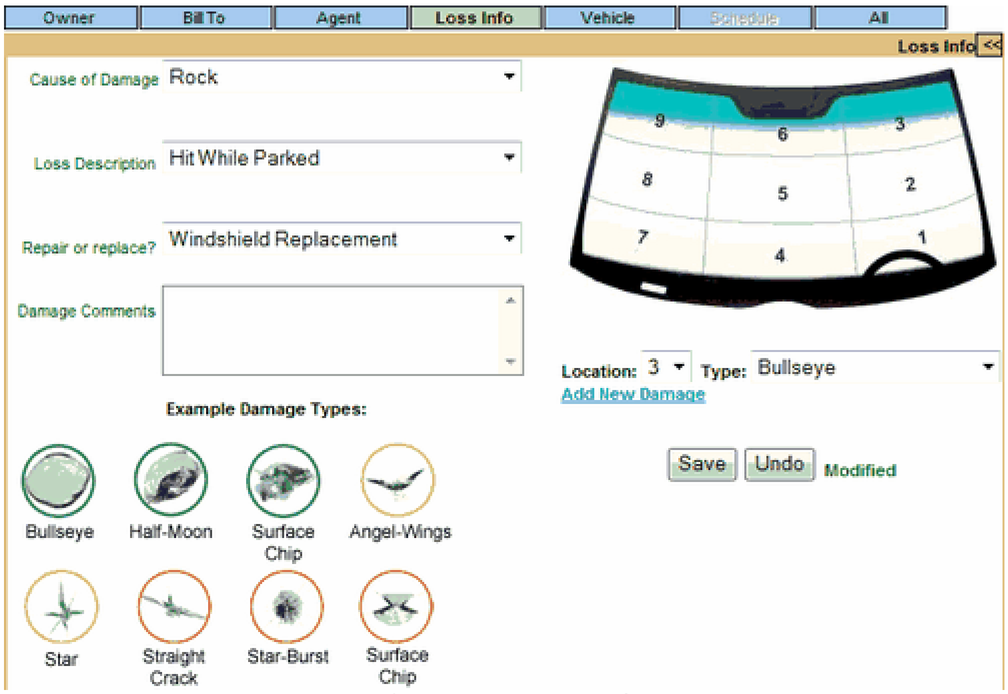
Select the correct people from the drop-down list(s) and enter an amount beside that person's name. This information will be saved with this record and will be available for you to run a report to properly pay commissions on an invoice by invoice basis.

3.3.2.4 Entering Loss Info

From the Loss Info tab on the Task Menu, you can document the location and type of loss.

1. Identify the location of the damage using the windshield graphic. Take this 'grid' number and select it in the 'Location' drop down box.
2. Next, using the "Example Damage Type' pictures, use the 'Type' drop-down to select the damage that matches the closest.
3. To add additional damage locations and types, click on 'Add New Damage'.
4. Harmon requires that you select either Repair or Replacement from the drop-down field on this screen.

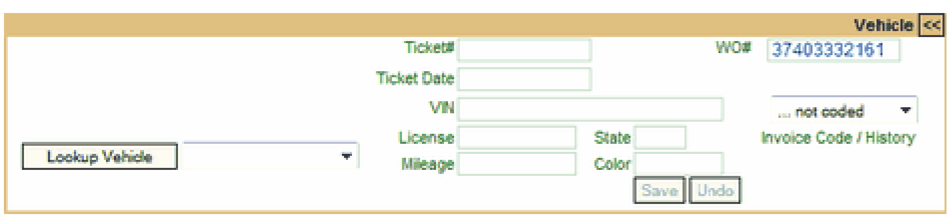
5. Once you are finished, you may add/edit other data, but make sure to click on the Save button to save your changes.



Loss Info Screen From Task Menu

3.3.2.5 Entering Vehicle Information

This feature will allow you to enter all of the information for the vehicle and will display the parts line items as you build the quote. From the Task Menu, select the Vehicle tab. *Note: You may already be on the Vehicle tab if you saved information from the previous tab.*



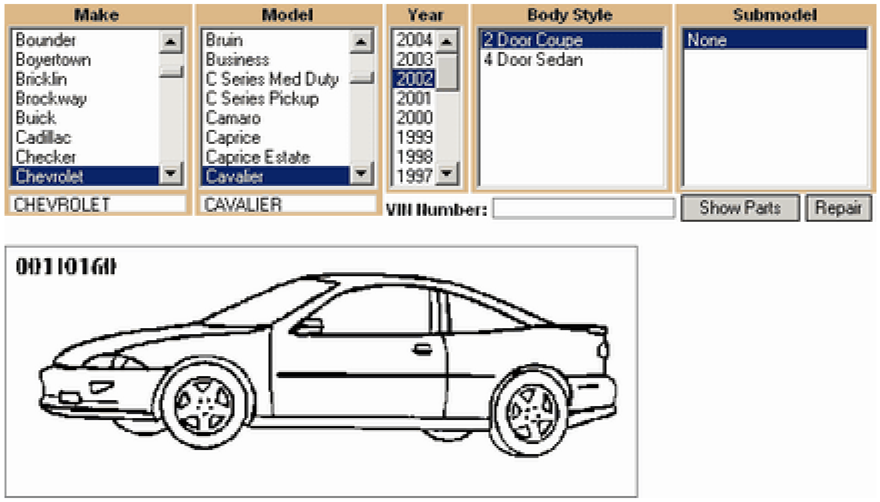
Vehicle Tab Screen

1. If you have a VIN, enter it into the VIN box and click on the Save button. If you do not have a VIN at this point, just go to the next step *(see note below)*.
2. Click on the Lookup Vehicle button to display the Vehicle Build window. If you entered and saved a VIN in the step above, the vehicle will automatically begin to decode as soon as you clicked on the Lookup Vehicle button. The vehicle may not build out all the way and you may have to select additional vehicle information before the Show Parts button becomes active.
3. If you do not have a VIN, you can simply select a Make, Model, Year, Body Style and Submodel instead.
4. If this is a repair, click on the Repair button. This will take you directly to the Add Line Item menu to select repair line items.

NOTE: If you have selected the Repair button, but need to make this a replacement instead, simply click on the Cancel Repair button. This will take you back to the

Vehicle tab, click on the Lookup Vehicle button to take you to the NAGS Parts list.

5. Otherwise, click on the Show Parts button to display a list of the NAGS and OEM parts.



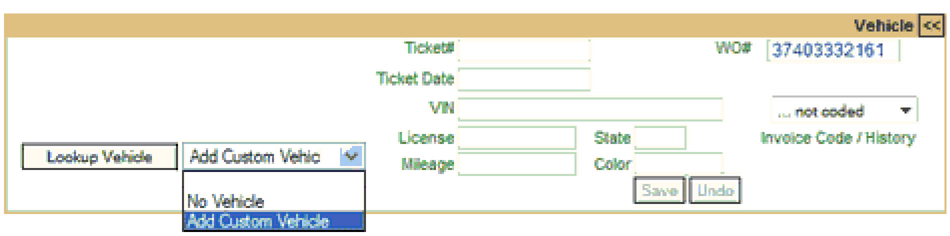
Vehicle Build Window

NOTE: We recommend that you enter the VIN as in step 1 above. This will validate the VIN before you go any further in the Quoting process. If you enter in the VIN number after the vehicle has been 'built' and the parts selected, the eDirectGlass system will not be able to validate the VIN.

3.3.2.5.1 Custom Vehicle Information

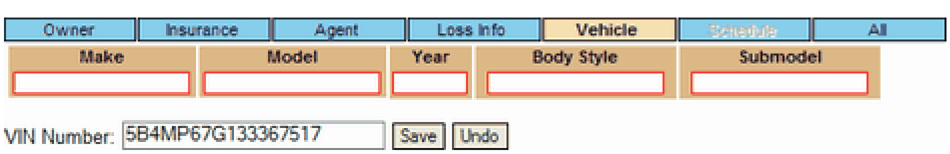
If you happen to have a vehicle that is not a part of the NAGS Car and Truck database, you can add a Custom Vehicle and select parts from your Private Parts Profile. To add a Custom Vehicle to this Quote:

1. From the drop down list next to the Lookup Vehicle button on the Vehicle Tab, select Add Custom Vehicle.



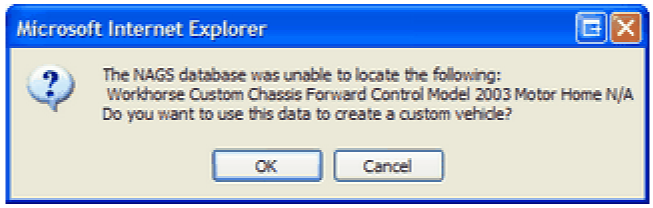
Vehicle Tab (Add Custom Vehicle)

2. If you have a VIN Number for the Custom Vehicle you are adding (e.g., motor home), enter it in the VIN Number box on the Add Custom Vehicle screen which will display in the Work Area once you have chosen "Add Custom Vehicle" from the drop down.



Add Custom Vehicle Screen

3. If the system is able to decode the VIN, you will get a dialogue box asking if you would like eDirectGlass to fill in the decoded information in the appropriate boxes. If you wish the system to handle this, click on the OK button in the dialogue box. If you would like to fill in the information on your own, click the Cancel button and enter the information manually.

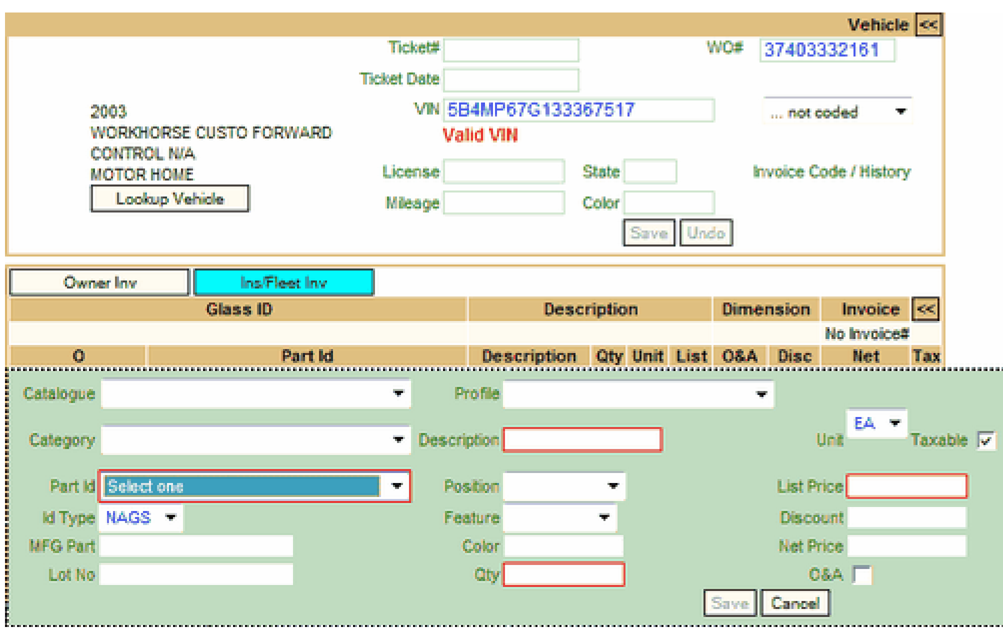


Custom Vehicle VIN Decoded Dialogue Box

4. If you do not have a VIN Number, simply fill in the appropriate fields manually. Once the fields are filled in, either through VIN decoding or manually and you have verified the information is correct, click on the Save button to add the Custom Vehicle to the Quote.

Completed Add Custom Vehicle Screen

5. Once you click on the Save button, you will be returned to the Vehicle Tab in order to add parts to the Quote from your Private Parts list.

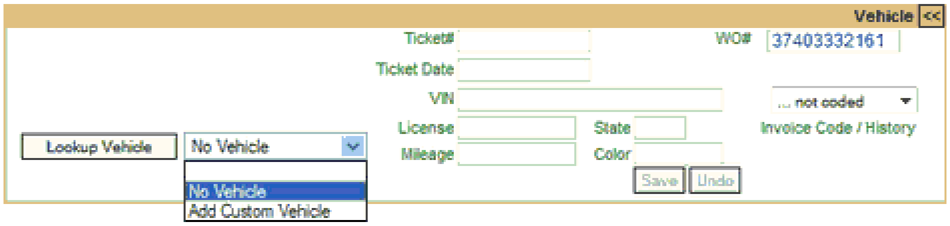


3.3.2.5.2 No Vehicle Information

If you need to make a Quote for an item that does not require vehicle information or NAGS parts, you can eliminate the need to enter this information in the eDirectGlass system.

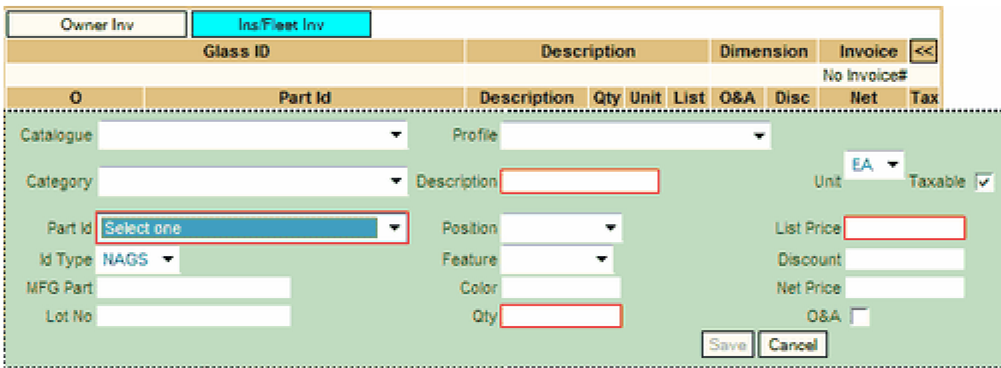
1. From the drop down list next to the Lookup Vehicle button on the Vehicle Tab, select Add

Custom Vehicle.



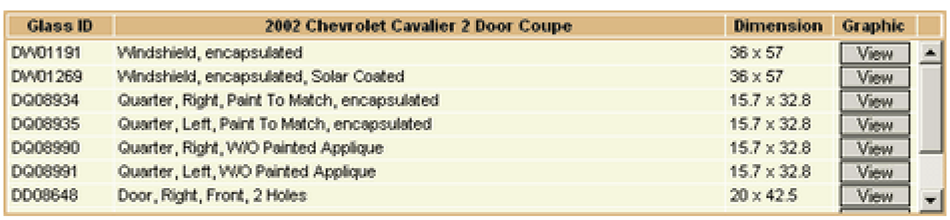
Vehicle Tab (No Vehicle)

2. Once you have selected the "No Vehicle", you will be on the Vehicle Tab in order to add parts to the Quote from your Private Parts list.



3.3.2.5.3 Selecting Parts

Once you have selected your vehicle and clicked on the Show Parts button, you will be taken to the Vehicle Parts window.



Vehicle Parts Window

1. Choose the Part Type by clicking on the part line. In addition, you can always click on the View button to see the graphics for that specific line item.
2. Once you have selected the Part Type line item, the Part Type sub menu of line items will appear. **Note: If you hover your mouse over the MFG Part box for the NAGS windshield, the system will give you additional information about the part. The same is true for the Color column.**
3. Select the items you wish to add to the quote. If you do not know which Glass Part you will actually need for the installation and wish to list more then one on the Quote/Repair Order (e.g, two different colors or windshields with and without rain sensors), you can add the additional windshield simply by placing a check mark next to that glass part as well. You can also apply a discount to the checked parts, by entering in a percentage in the Discount: box. This discount will only apply to the items selected and will not be applied to labor. NAGS Interchange parts are listed in hot pink on the screen.

NOTE: This discount should only be applied to a Quote that *will not* be paid by an Insurance company, Fleet company or TPA.

4. Once you have selected all of the parts for this Quote, click on the Add Items to Quote button. Once you do this, you will be automatically taken back to the Vehicle screen from the Task Menu and your line items will now appear. Any discounts you have entered in the Discount: box will be carried over to the Quote.

	Part Id	MFG Part	Color	Vendor	Description	Qual	Ref	Qty	Unit	Price
☑	DW01191	DW01191GBYN	GBN	NAGS	Windshield		1	2.3	hrs	777.10
☐	DW01191	DW01191GTYN	GTN	NAGS	Windshield		1	2.3	hrs	700.80
☐	DW01191	22658130	GTY	General Motors	Windshield		1	2.3	hrs	214.55
☐	HAH000004	HAH000004		NAGS	Adhesive	2.0 Urethane,Dam,Primer		1	each	28.00
☑	HAH000448	HAH000448		NAGS	Adhesive	2.0 Fast-Cure Urethane/Dam/Primer		1	each	48.00
☐	HLU000001	HLU000001		NAGS	Lubricant	Encapsulation Lubricant		1	each	20.00
☑	HMT000025	20626174		General Motors	Mount	Mirror	2	1	each	10.65

Discount: Add Items to Quote Total $835.75

Part Type Line Items

3.3.2.5.3.1 Adding Additional Parts

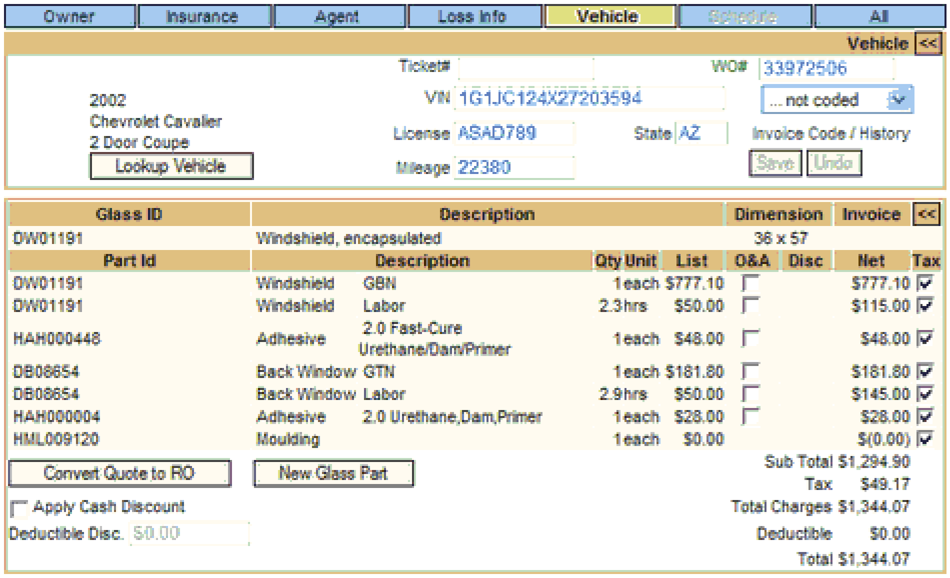
Once you have made the initial selection of parts, you have two ways you can add parts to a Quote. The first deals with adding additional Glass Parts (i.e., adding door glass to a Quote for a windshield). The second deals with adding non-NAGS parts to a Quote.

1. Once you have made the initial parts selection on a Quote and have hit the Add Items to Quote button, you may then add additional Glass Parts by first clicking on the New Glass Part button located under your parts list.
2. This will take you back to the NAGS part list. You will notice that the part that you originally selected from the NAGS parts list in no longer available for selection.

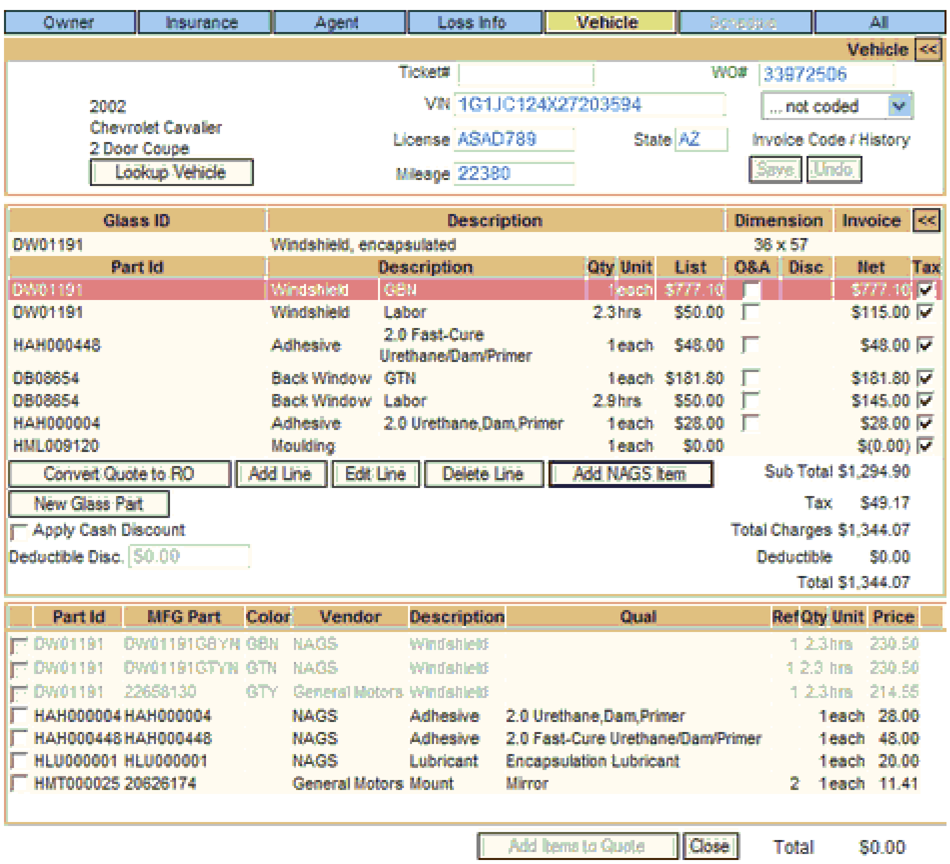
Owner | Insurance | Agent | Loss Info | Vehicle | Schedule | All

Glass ID	2002 Chevrolet Cavalier 2 Door Coupe	Dimension	Graphic
DW01191	Windshield, encapsulated	36 x 57	View
DW01269	Windshield, encapsulated, Solar Coated	36 x 57	View
DQ08934	Quarter, Right, Paint To Match, encapsulated	15.7 x 32.8	View
DQ08935	Quarter, Left, Paint To Match, encapsulated	15.7 x 32.8	View
DQ08990	Quarter, Right, W/O Painted Applique	15.7 x 32.8	View
DQ08991	Quarter, Left, W/O Painted Applique	15.7 x 32.8	View
DD08648	Door, Right, Front, 2 Holes	20 x 42.5	View
DD08649	Door, Left, Front, 2 Holes	20 x 42.5	View
DB08654	Back Window, Heated	37.8 x 49.9	View
DB08655	Back Window, Paint Band	37.8 x 49.9	View

3. From here you would choose another glass part and add it and it's associated parts to the Quote just as you did with the originally selected Glass Part. Once you have selected the parts to add, just click on the Add Items to Quote button and you will be returned to the Vehicle tab with the newly selected parts showing in list and calculated in the costs. You may do this for as many Glass Parts as you need.



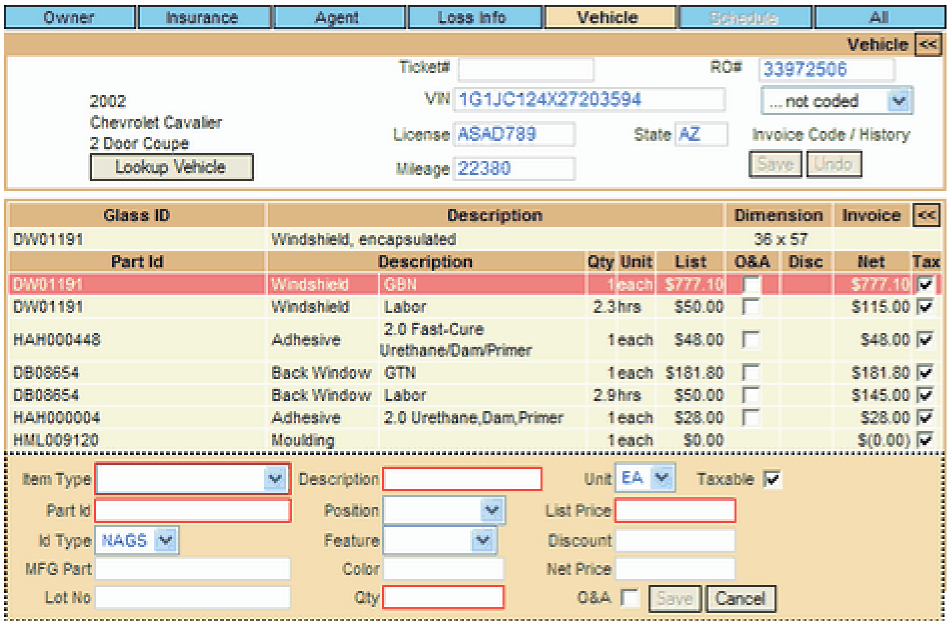
1. To add additional NAGS Parts (e.g., adhesives, mouldings, etc.) to an existing Glass Part, highlight the glass item you wish to add parts to and new buttons will appear under the parts list.
2. Click on the Add NAGS Item button which will display the NAGS part list for the Glass Part you have highlighted. You will not be able to add another Glass Part using this functionality, just the related parts.



3. Once you have checked off all of the parts you wish to add to the Quote, click on the

Add Items to Quote button.

1. From the Vehicle tab, highlight any of the Glass Parts listed on the screen. This will make new buttons appear under the parts list. Click on the Add Line button which will open your Private Parts Profile list.



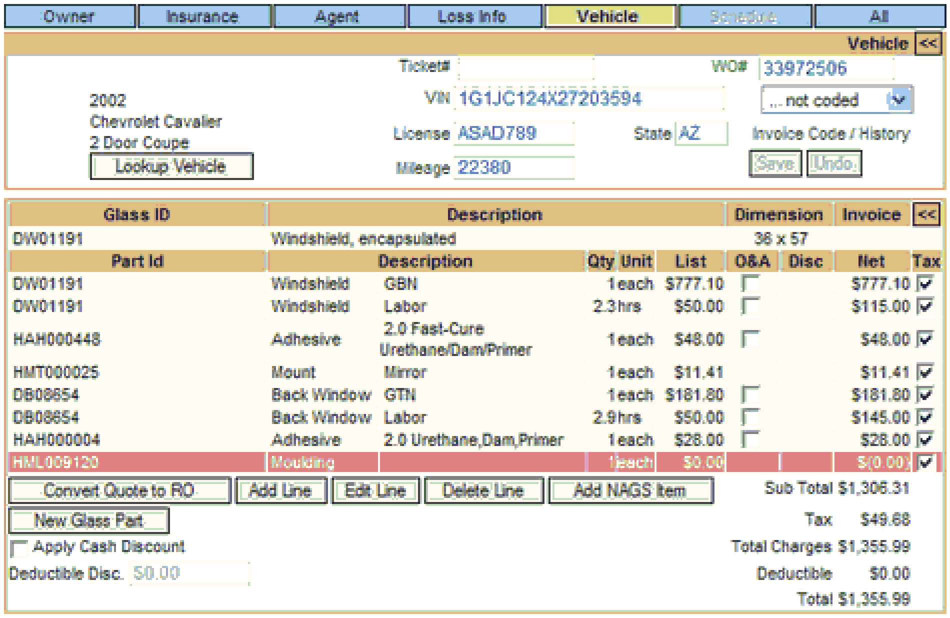
Vehicle Tab with Private Parts Selection Box

2. Simply choose which of your private parts you wish to add from the Item Type drop down list, adjust the List Price and Qty if necessary and click on the Save button.

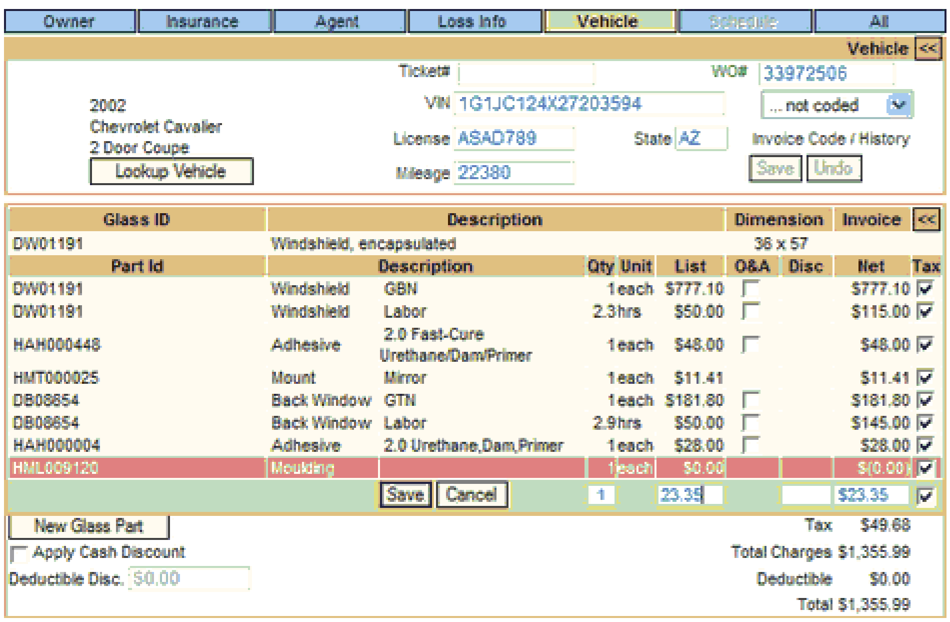
3.3.2.5.3.2 Editing & Deleting Parts

If you need to change a price (you may only change a price on a dealer part or on a part that is listed as $0 in the NAGS database) in the eDirectGlass system for a line item, following the steps below.

1. Highlight the part you wish to update and a new set of buttons will appear under the parts list.



2. Click on the Edit Line button and adjust the price of the line item in the list price box.



3. When you have finished. click on the Save button.

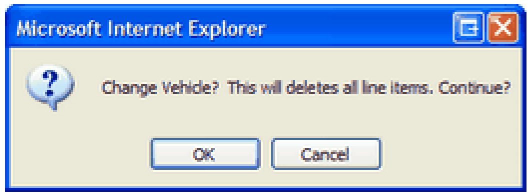
If you would like to delete a line item. simply highlight the line and click on the Delete Line button and click on the OK button in the dialogue box.

3.3.2.5.4 Changing Vehicle

NOTE: If you should need to change the Vehicle you selected originally, all of the parts you added to the Quote will be removed and you will need to select them all again.

1. On the Vehicle tab, click on the Lookup Vehicle button located under the original vehicle's

description. You will be prompted by a dialogue box asking if you are sure you wish to change the vehicle and delete all of the line items. Click on the OK button to continue.

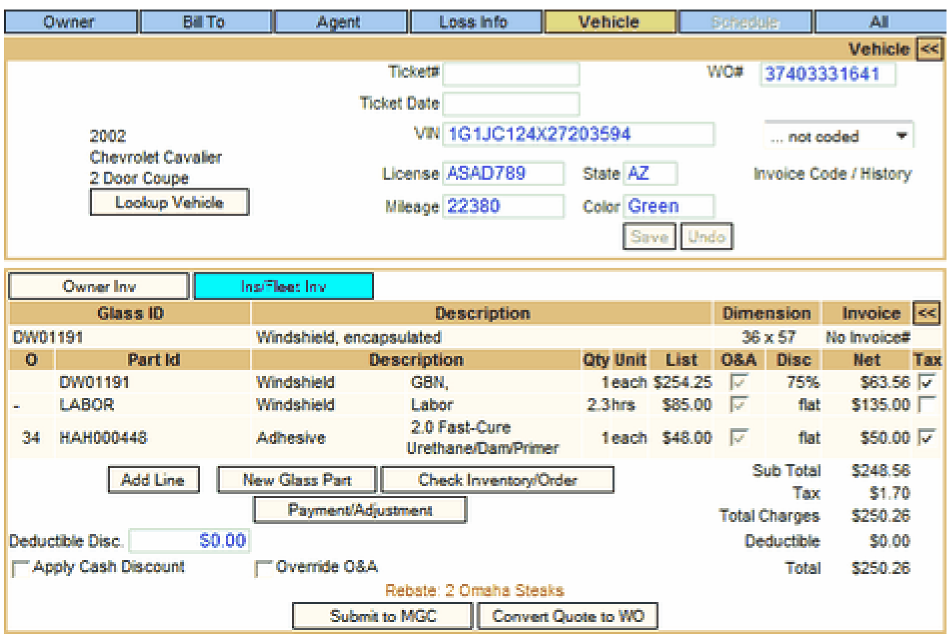


2. You will be taken back to the vehicle build screen where you will need to select a new vehicle (or decode a new VIN) and continue on with the parts selection.

3.3.2.5.5 Finishing Vehicle Information

After you have selected the parts from the Vehicle Parts process, you will be automatically returned to the Vehicle screen from the Task Menu. From here, you can enter additional information, if known, such as the VIN (if you have not already entered and saved the VIN number in the decoding process), License Plate, Ticket # (this is a searchable reference number that your company may use to identify invoices based on a manual ticket number) and Mileage. Remember, you must click on the Save button if you make changes to any one of those fields.

When complete, your Vehicle Information window will look like this:

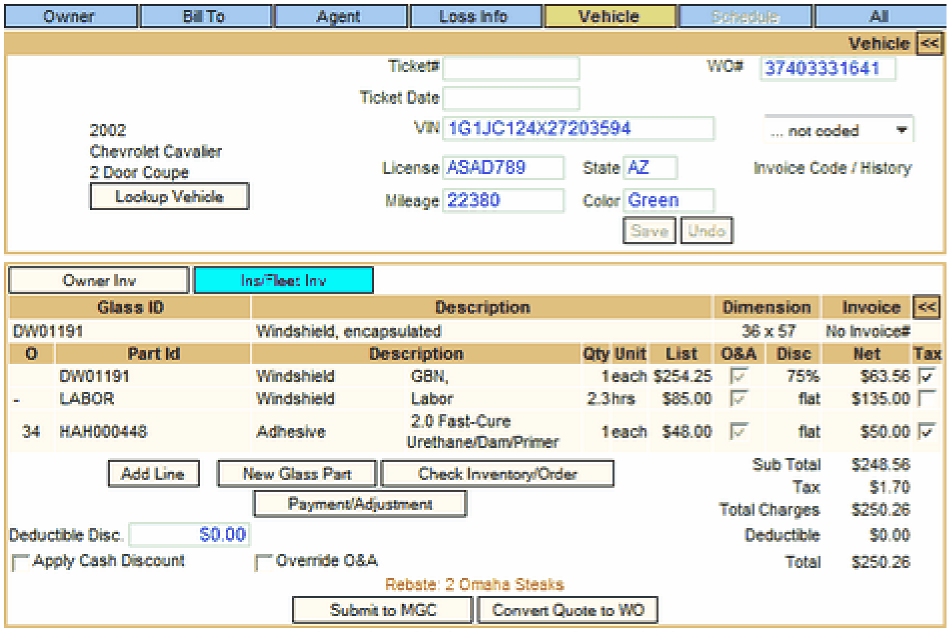


Complete Vehicle Information Window

NOTE: We recommend that you enter the VIN as in step 1 of the *Entering Vehicle Information* section. This will validate the VIN before you go any further in the Quoting process. If you enter in the VIN number after the vehicle has been 'built' and the parts selected, the eDirectGlass system will not be able to validate the VIN.

3.3.2.5.5.1 WO Number

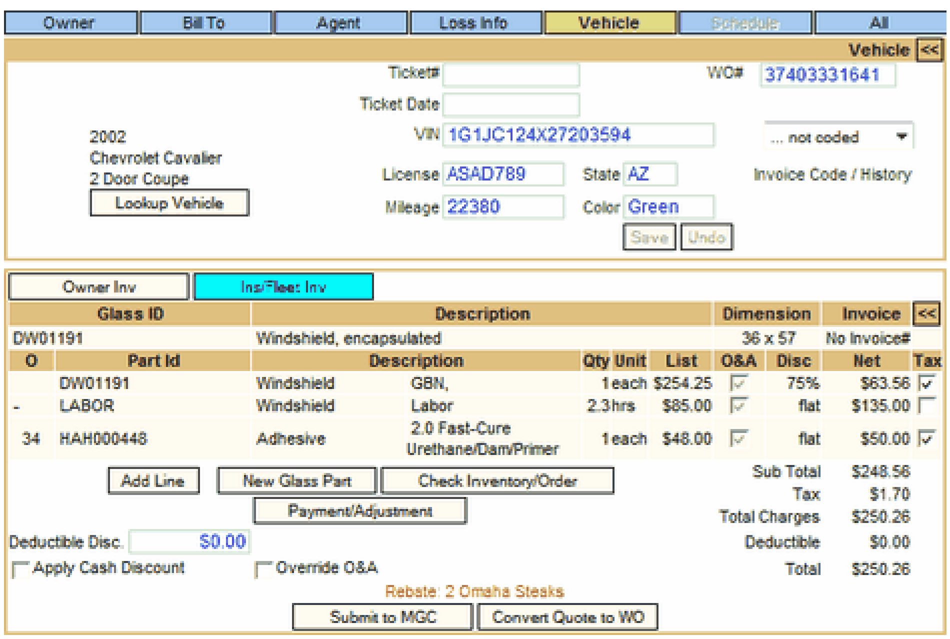
On the Vehicle Tab screen, you will find an WO # field. This field contains the Store Number (the first 4 digits) and the system generated unique identifier for this particular Quote (WO or Invoice). You are not able to change the information in this box.



Completed Vehicle Information Window

3.3.2.5.5.2 Ticket Number

On the Vehicle Tab screen, you will find a Ticket # field. This is for you to enter in any 'manual invoice' numbers you may use in your day to day business. This field is for business tracking purposes only and is not required.



Completed Vehicle Tab Screen

3.3.3 Applying Discounts

The eDirectGlass system allows you to manage and apply different types of discounts to a Quote. These discounts include O&A Rules, Cash Profile discounts, promotional Deductible Discounts, as well as, an overall percentage discount to a cash quote. The following section will explain how each of the different discounts can be applied to a Quote.

3.3.3.1 Applying O&A Rules to a Quote

eDirectGlass has two methods for applying Offer and Acceptance rules to jobs. By default, any assignment sent to you through the eDirectGlass system from an Insurance, Fleet or TPA using eDirectGlass is automatically calculated with O&A rules.

When a quote is created from walk-in business or for an Insurance company, Fleet company or TPA who does not use the eDirectGlass system to initiate claims and you will be billing to an Insurance company, Fleet company or TPA, you can quickly and easily manually apply the O&A rules you have set up in your system *(see C&V Relationship Mgmt - Insurance Contact, of this manual)* for that company.

On the **Vehicle** tab, simply click on the O&A check box in the Parts List and the line items will automatically convert and apply the O&A discounts and pricing rules that you have previously set up in the Insurance Contact Record in the C&V Relationship module of the eDirectGlass system. If you have selected an insurance company that already set up O&A rule for under C & V Relationship Management, these rules will already be applied.

O&A Rules Applied in Quotes

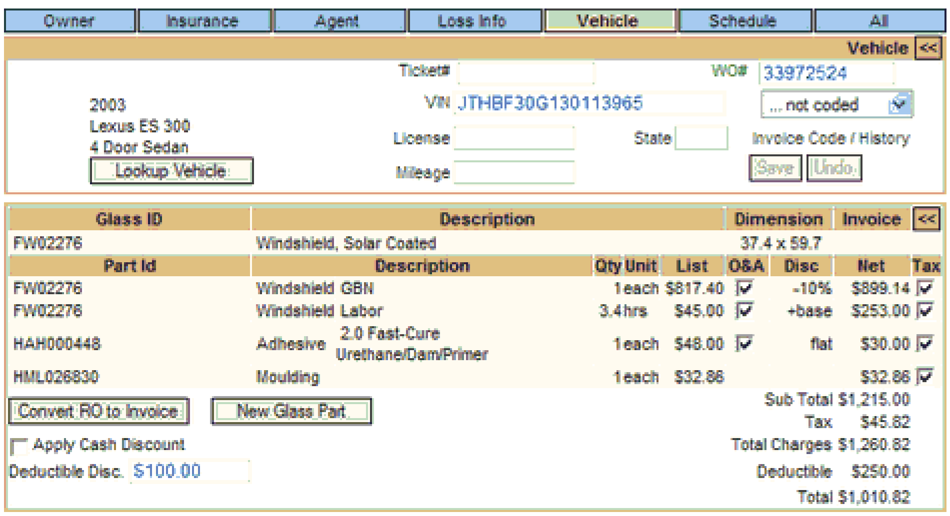
3.3.3.2 Applying Deductible - Promotional Discount

If you need to reduce the customer's portion of an Invoice (either by applying a discount to the deductible or by applying a promotional amount), you will enter either of those amounts in the following manner:

1. Open the Quote (Work Order or Invoice) you will be applying the discount to, click on the Vehicle tab to display the Vehicle and Line Item information in the Work Area.

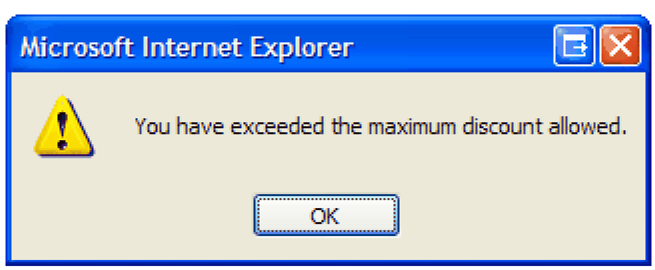
Vehicle Tab

2. In the Deductible Disc. box, enter in the amount by which you wish to reduce the customer's invoice.



Deductible - Promotion Discount Applied

3. If you exceed the maximum discount allowed by your company (this is set up in the Administration section of eDirectGlass), you will get the following error:



4. If you do get this error, simply change the amount you entered in the Deductible Disc. field to be less than your company's maximum allowable discount.

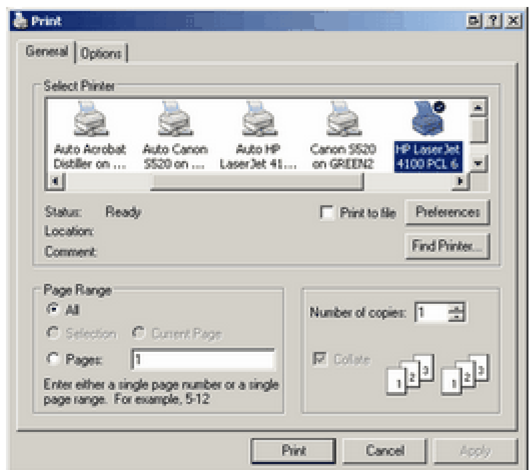
3.3.4 Printing a Quote

To print a Quote in eDirectGlass (please make sure you have followed all of the steps under Section 1, *Getting Started* before you attempt to print any Quotes):

1. Select and open a Quote.
2. Click on the Print Quote button.
3. The Quote Print Preview screen will open in a new browser window.
4. Click on the button on the report viewer toolbar located under your browser window address bar.

Report Viewer Toolbar

5. A print dialogue box will appear. Select the printer you wish to print to and click on the Print button.



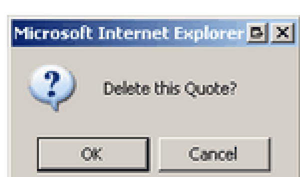
Print Dialogue Box

When you have finished printing, just close the report viewer browser window.

3.3.5 Deleting a Quote

To delete a Quote in eDirectGlass:

1. Open a Quote.
2. Click on the Delete Quote button.
3. A dialogue box will appear asking you if you want to delete the Quote.



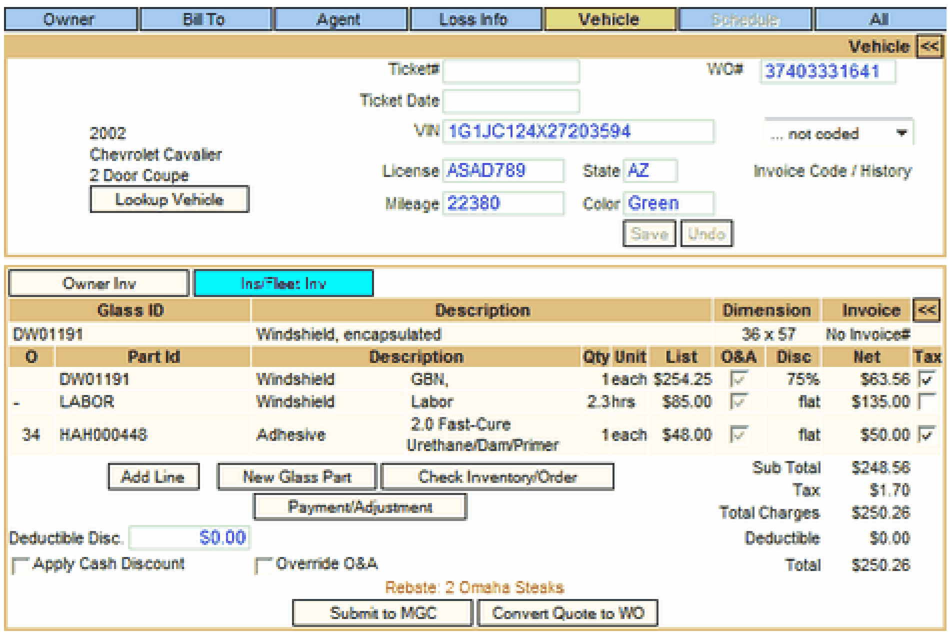
Delete Quote Dialogue Box

4. Click on the OK button and the Quote will be permanently deleted.

3.3.6 Converting a Quote to a Work Order

Converting a Quote to a Work Order will allow you to schedule the job and move it toward Invoice status.

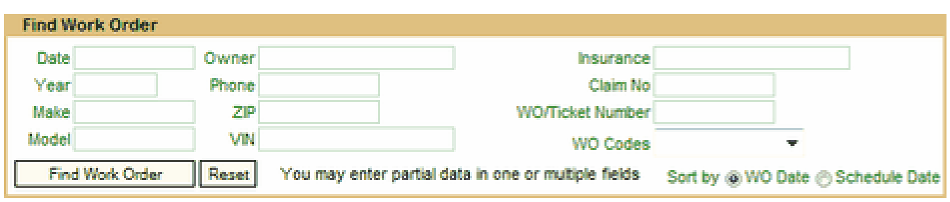
1. Open a Quote.
2. Open the Vehicle window.
3. Click on the Convert Quote to WO button.
4. The Quote will be converted to a Work Order and the screen will change to the Schedule view in Work Order.



Quote Vehicle Window - Convert Quote to Work Order

3.4 Work Orders

The Work Orders module in eDirectGlass allows you to manage and schedule your jobs. To start, click on the Work Orders button in the Sub Menu. The Find Work Order window will open in the Work Area.



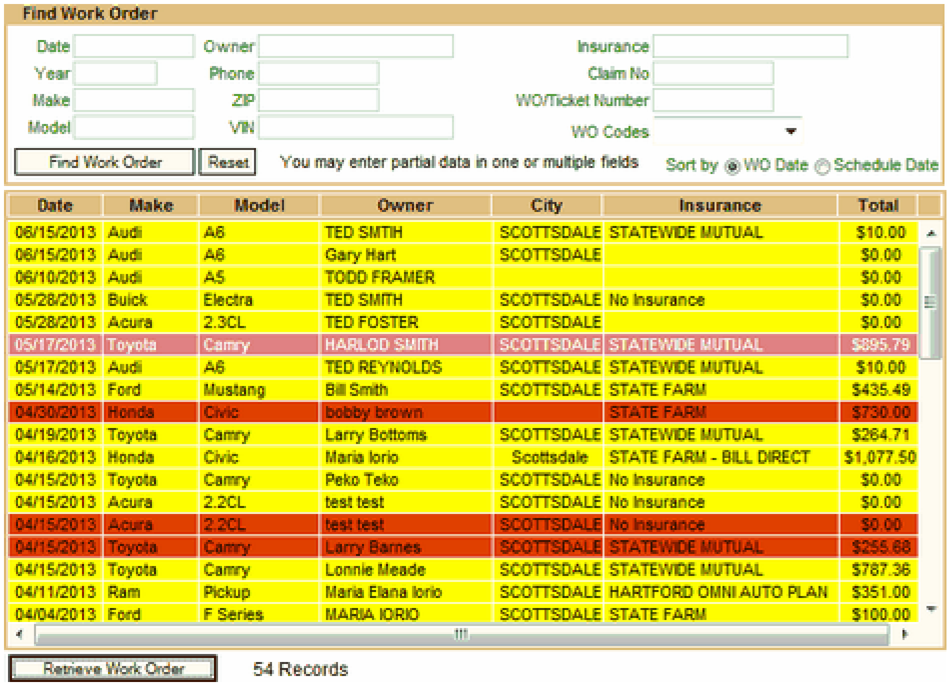
Find Work Order Window

3.4.1 Open Work Order

To open and work with a Work Order, click on the Work Orders button in the Sub Menu to open the Find Work Order window.

1. In the Find Work Order window, enter the search information to locate the specific Work Order you wish to work with and click on the Find Work Order button. To see all Work Orders, just

click on the [Find Work Order] button and the list of Work Orders will display in the Work Area.



Date	Make	Model	Owner	City	Insurance	Total
06/15/2013	Audi	A6	TED SMTIH	SCOTTSDALE	STATEWIDE MUTUAL	$10.00
06/15/2013	Audi	A6	Gary Hart	SCOTTSDALE		$0.00
06/10/2013	Audi	A5	TODD FRAMER			$0.00
05/28/2013	Buick	Electra	TED SMITH	SCOTTSDALE	No Insurance	$0.00
05/28/2013	Acura	2.3CL	TED FOSTER	SCOTTSDALE		$0.00
05/17/2013	Toyota	Camry	HARLOD SMITH	SCOTTSDALE	STATEWIDE MUTUAL	$895.79
05/17/2013	Audi	A6	TED REYNOLDS	SCOTTSDALE	STATEWIDE MUTUAL	$10.00
05/14/2013	Ford	Mustang	Bill Smith	SCOTTSDALE	STATE FARM	$435.49
04/30/2013	Honda	Civic	bobby brown		STATE FARM	$730.00
04/19/2013	Toyota	Camry	Larry Bottoms	SCOTTSDALE	STATEWIDE MUTUAL	$264.71
04/16/2013	Honda	Civic	Maria Iorio	Scottsdale	STATE FARM - BILL DIRECT	$1,077.50
04/15/2013	Toyota	Camry	Peko Teko	SCOTTSDALE	No Insurance	$0.00
04/15/2013	Acura	2.2CL	test test	SCOTTSDALE	No Insurance	$0.00
04/15/2013	Acura	2.2CL	test test	SCOTTSDALE	No Insurance	$0.00
04/15/2013	Toyota	Camry	Larry Barnes	SCOTTSDALE	STATEWIDE MUTUAL	$255.68
04/15/2013	Toyota	Camry	Lonnie Meade	SCOTTSDALE	STATEWIDE MUTUAL	$787.36
04/11/2013	Ram	Pickup	Maria Elana Iorio	SCOTTSDALE	HARTFORD OMNI AUTO PLAN	$351.00
04/04/2013	Ford	F Series	MARIA IORIO	SCOTTSDALE	STATE FARM	$100.00

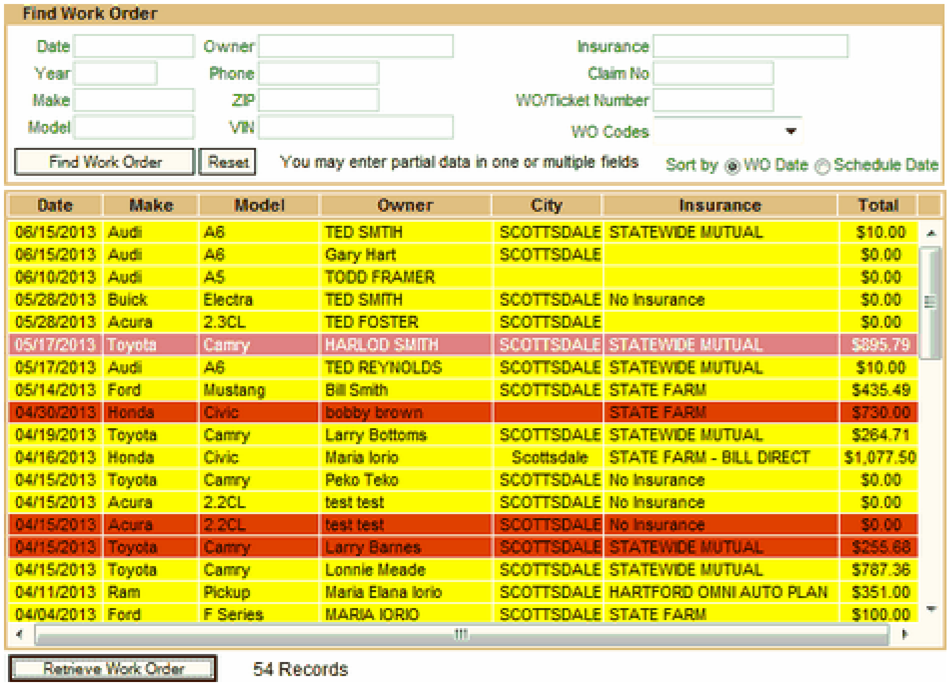
Work Orders List

2. Double-click on the Work Order you wish to open or single-click on a Work Order and click on the [Retrieve Work Order] button and the Work Order will open.

3.4.1.1 Work Orders List Color Coding

Note: The Work Orders list is color coded for easy identification of items that require attention.

- Red - indicates Work Orders that do not have a schedule date and time in the eDirectGlass system.
- Yellow - indicates Work Orders that have not been marked as completed, but are one or more days past the scheduled date.
- Green - indicates Work Orders that have been marked as completed, but have not yet been converted into an invoice.

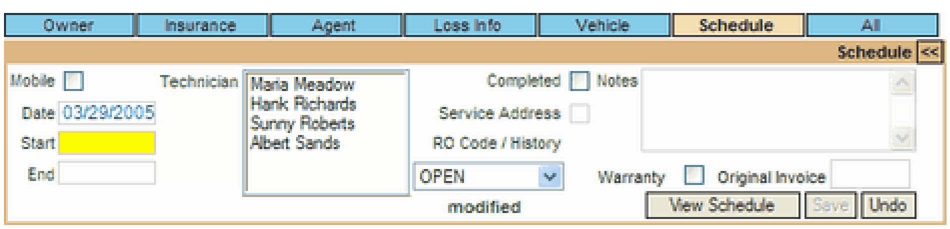


Work Orders List

3.4.2 Schedule Work Order

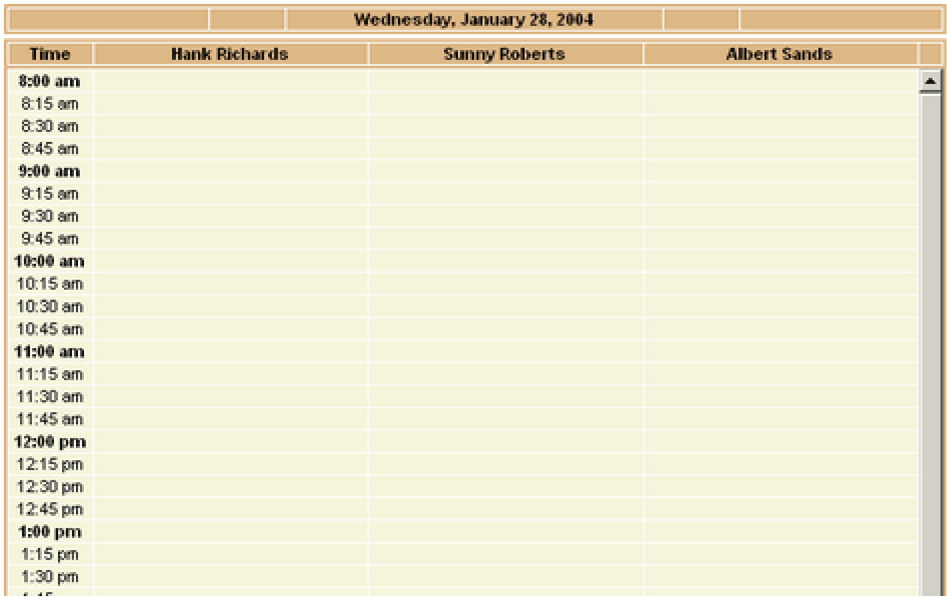
eDirectGlass allows you to manage your production schedule very effectively. In the Work Order module, open a Work Order and click on the **Schedule** tab on the Task Menu. The Schedule window will appear in the Work Area. The way you have set your shop up in the System Admin will determine which schedule view you will see when you click on the **Schedule** tab in a Work Order.

3.4.2.1 Hourly Job Schedule



Hourly Schedule Window

1. Determine whether the job will be Mobile or In-House. If Mobile, click on the check box next to Mobile ☐. You will notice that the names in the Technician Box may change depending on whether or not a Technician was setup as Mobile, In-House or both.
2. Select a Technician by clicking on the Technician's name.
3. Click on the Date field to select an appointment date.
4. The Day Calendar View will display in the Work Area and the Start Time field will be highlighted in the Schedule window.

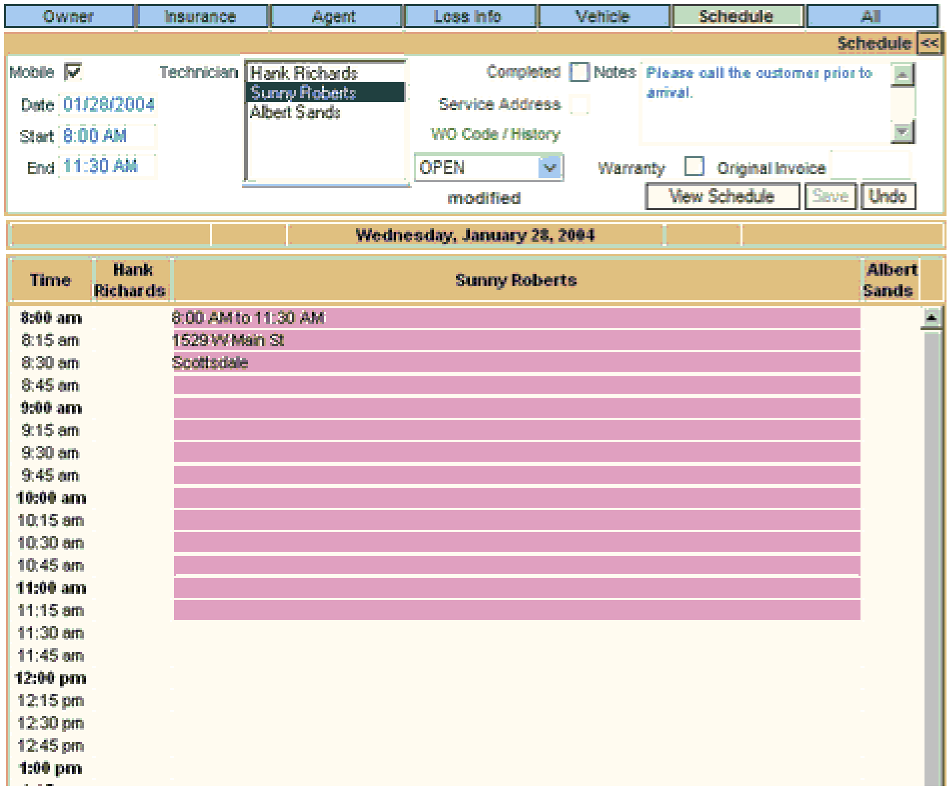


Day Calendar View - Hourly

5. Click on a Start Time in the Day Calendar View.

   NOTE: You must click on the Start Time in the Day Calendar View under the Technician for which you wish to schedule this appointment. If you just click on the Start Time in the Day Calendar View in the first column, you will be assigning that job to the Technician whose name appears in the first column and not necessarily to the Technician you wished to assign the job.

6. Click on an End Time in the Day Calendar View (also in the correct Technician's column).
7. Click on the Save button to add the appointment.
8. The appointment will be added to the production schedule and will appear in the Day Calendar View with the appointment details.

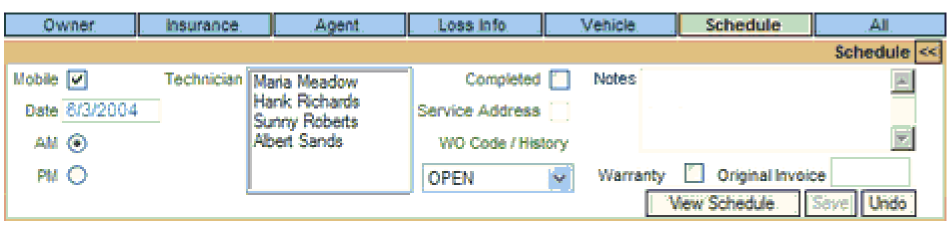


Appointment in the Day Calendar View - Hourly

You can also add Notes that will appear with the appointment, both on the screen and on the print out. These notes will only be available to your account and will not print on the final Invoice. Just type the appointment notes in the Notes box and click on the Save button.

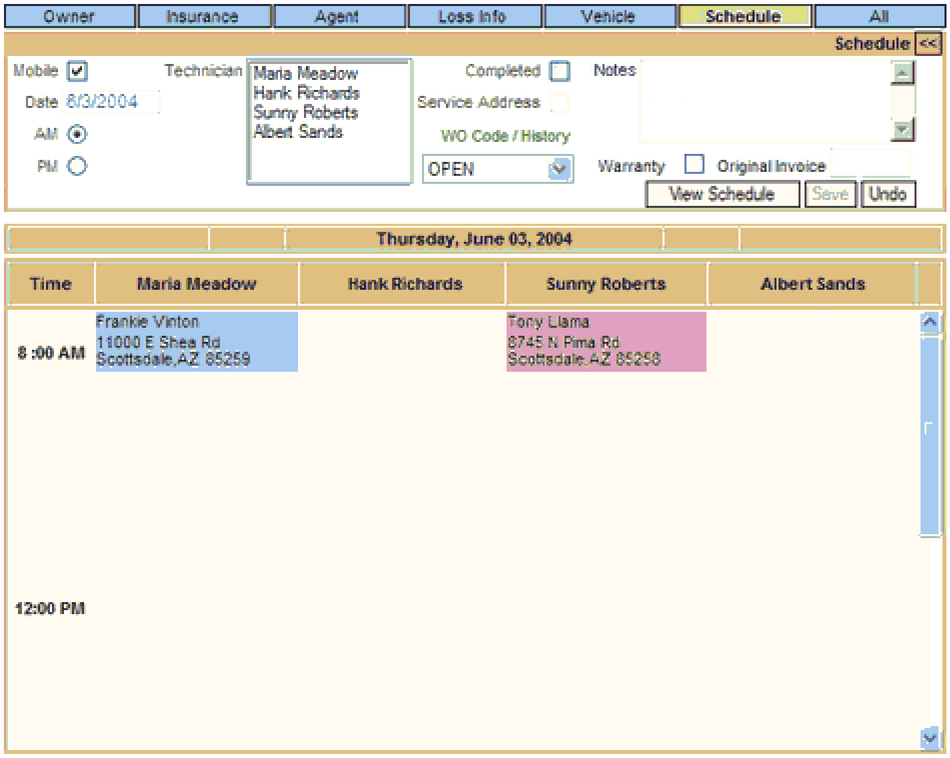
You can also use the Warranty check box to track if this Work Order was a warranty Repair/Replacement. Simply check off the Warranty check box, enter in information in the Original Invoice box (you must enter in something in this box if you check off the warranty box) and click on the Save button.

3.4.2.2 AM/PM Schedule



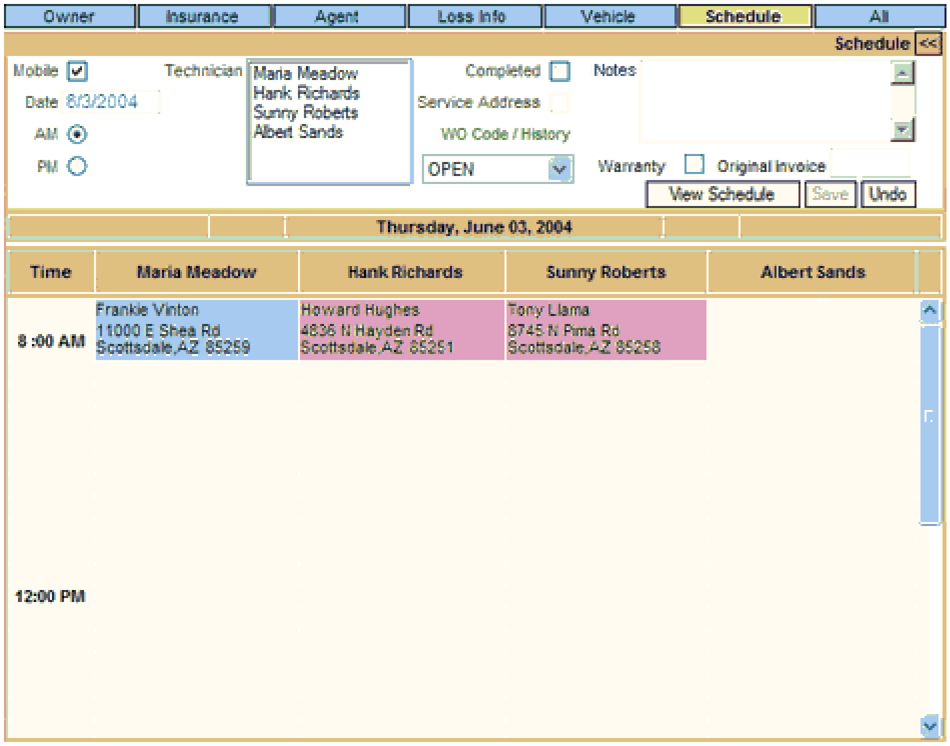
AM/PM Schedule Window

1. Determine whether the job will be Mobile or In-House. If Mobile, click on the check box next to Mobile. You will notice that the names in the Technician Box may change depending on whether or not a Technician was setup as Mobile, In-House or both.
2. Click on the Date field to select an appointment date or click on the View Schedule button if the appointment is for the date already shown in the Date field.
3. The Day Calendar View will display in the Work Area.



Day Calendar View - AM/PM

4. Click in the first available field under the correct Technician's name in either an open AM or PM slot. **Note:** You need to have the correct radio box (AM or PM) selected for this particular appointment and you must also click under the Technician's name in a PM slot for a PM job.
5. Click on the Save button to add the appointment.
6. The appointment will be added to the production schedule and will appear in the Day Calendar View with the appointment details.



Appointment in the Day Calendar View - AM/PM

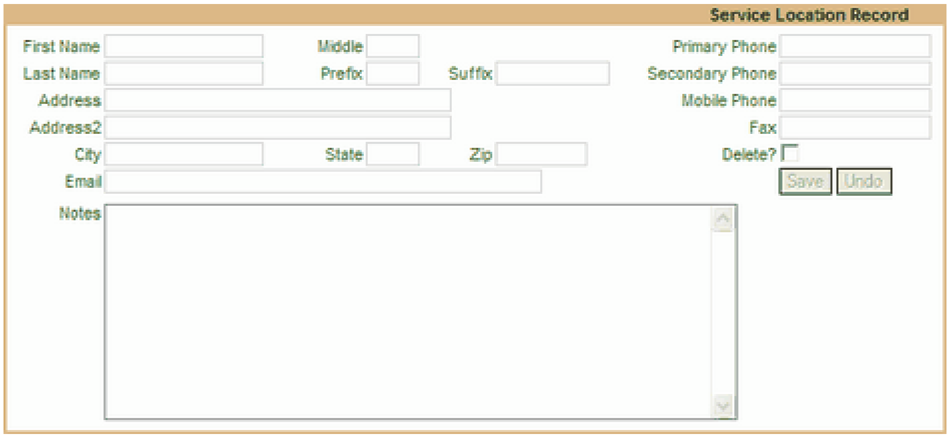
You can also add Notes that will appear with the appointment, both on the screen and on the print out. These notes will only be available to your account and will not print on the final Invoice. Just type the appointment notes in the Notes box and click on the Save button.

You can also use the Warranty check box to track if this Work Order was a warranty Repair/Replacement. Simply check off the Warranty check box, enter in information in the Original Invoice box (you must enter in something in this box if you check off the warranty box) and click on the Save button.

3.4.3 Service Address

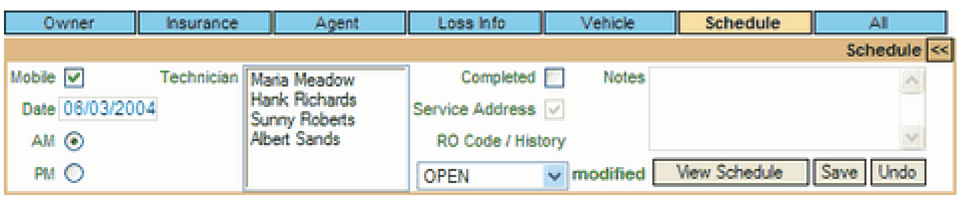
The eDirectGlass system allows you to store a Service Address in addition to the Owner's home address which is recorded on the Owner tab. This Service Address will appear on the Work Order print out.

1. Open the Work Order to which you wish to add the Service Address.
2. When you open the Work Order, the Service Address button will appear in the Sub Menu. Click on the Service Address button to display the Service Location Record window in the Work Area.



Service Location Record Window

3. Fill out all of the pertinent information including any notes (you can use the notes section for cross street information).
4. When you have finished, click on the Save button.
5. Click on the yellow **Work Order** button (the Sub Menu header) to return to the Work Order you were working with.
6. The Schedule tab of the Work Order with a Service Address will have a check mark in the Service Address box letting you know that one has been saved for this record.



Schedule Tab with Service Address

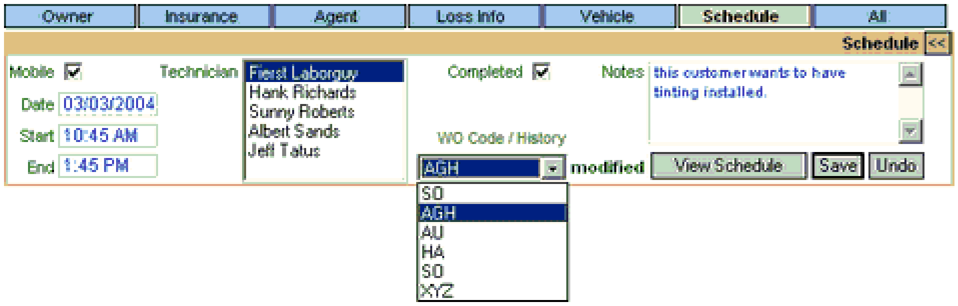
7. Should you need to make changes to the Service Address, simply click on the Service Address button in the Sub Menu after you have opened the Work Order, make the necessary changes then click on the Save button when you have finished.
8. If you need to remove the Service Address entirely, place a check mark in the Delete? box in the Service Location Record and then click on the Save button. **NOTE: Checking the delete box and saving the record will permanently remove the Service Address from this record. If you accidentally delete the Service Address from the record, you will need to re-enter all of the information.**

3.4.4 Using WO Codes

This section will discuss using and tracking the Work Order (WO) Codes you added during the eDirectGlass Administration set up. These codes will help you keep track of your outstanding WO's and their status.

3.4.4.1 Applying WO Code

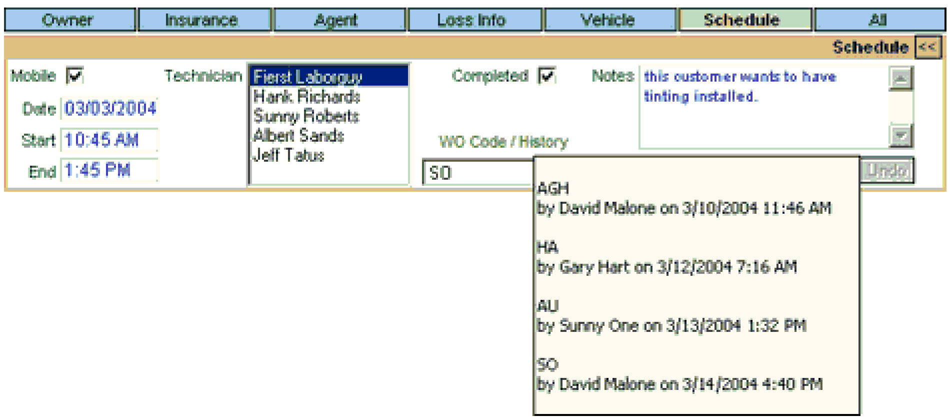
The Schedule tab is also the screen where you will update the WO Code for this particular Work Order. Just select the appropriate WO Code from the drop down list and click on the Save button.



WO Code Drop Down List

3.4.4.2 WO Code History View

You can also view the history of the WO Code changes by placing your mouse over the WO Code / History header to show the user name and date & time stamp of the WO Code change(s).



WO Code History View

3.4.5 Attachments

eDirectGlass allows users to attach image documents directly to the claims record. Documents such as customer signed work orders, parts purchase orders and network paper authorization can become a permanent part of the electronic claim. You can import the images directly from your scanner (or other TWAIN device) or attach image files that have been saved on your computer already. The basic Attachment feature only allows you to attach image files to your records. eDirectGlass also offers two add-on features, Attachment Plus and Attachment Pro which has greater capabilities. Please contact your eDirectGlass associate for further information regarding these add-on features.

NOTE: Please make sure you follow all of the set up items under the *Getting Started* section of this manual before you use this function for the first time.

3.4.5.1 Add Attachment

1. Click on the Quotes & Invoicing button on the Menu Bar.
2. Select the appropriate Sub Menu button (Quotes, Work Orders or Invoicing) to find the record you need.
3. Search and find the appropriate record and double-click on the line.
4. Once the record is open, the Add Attachment and the View Attachment buttons will be displayed in the Sub Menu.
5. Click on the Add Attachment button and the Image Attachment screen will open in another browser window.

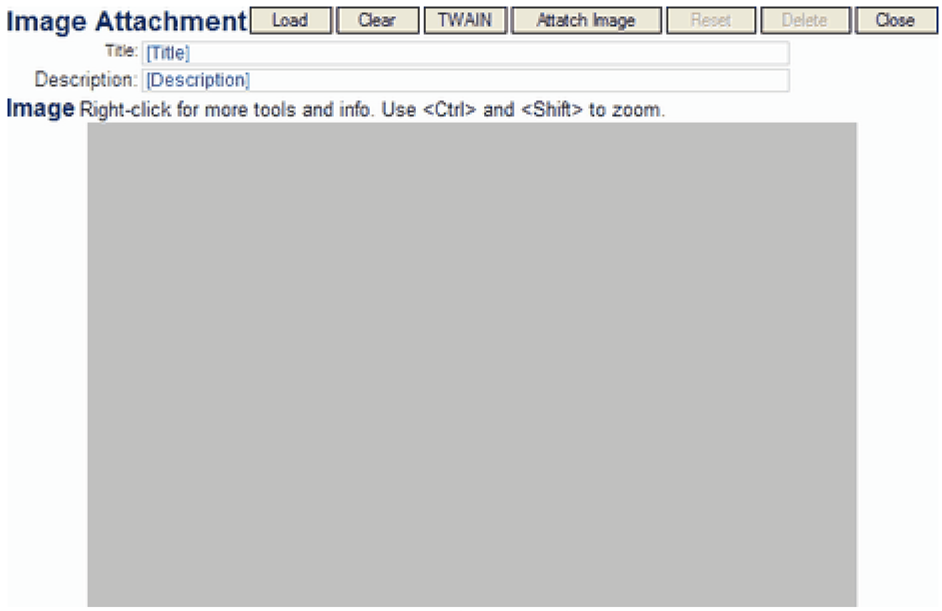


Image Attachment Window

3.4.5.1.1 Attach Saved Image

1. To attach a file that has been previously saved on your computer, click on the Load button. This will bring up the image find/open window in the Work Area. Locate the folder where the image was saved, highlight the image and then click on the Open button to load the image in the Image Attachment Screen.

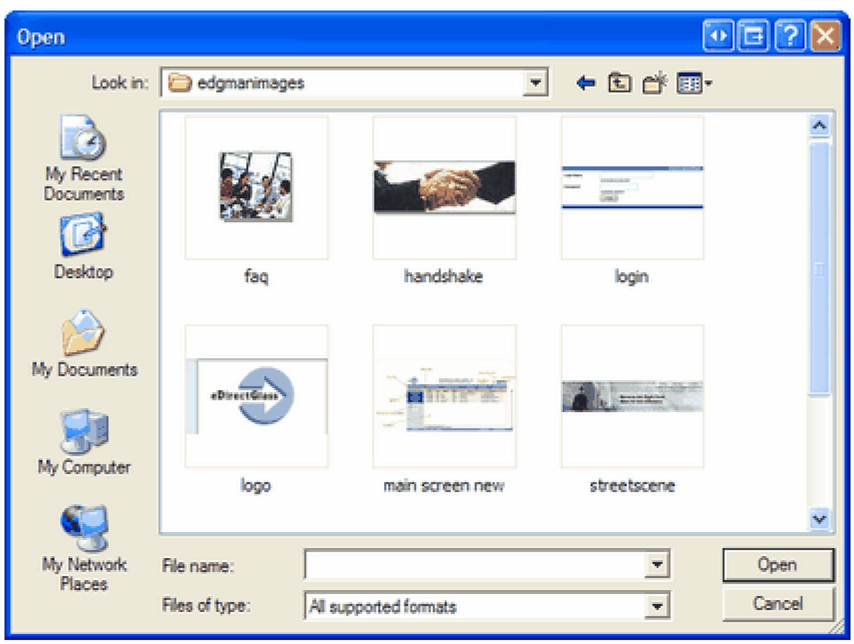


Image Find/Open Window

2. Enter in a Title and Description for the image to help you identify the item later, then click on the Attatch Image button to add the image to the record.

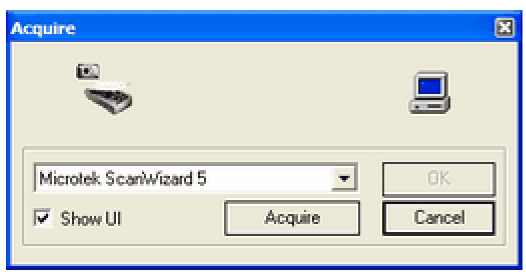
IMPORTANT NOTE: Due to the nature of the database eDirectGlass uses, the use of an apostrophe (') often causes problems when you are trying to save records. In order to avoid

lost data, we suggest you do not use an apostrophe (') anywhere in the system at any time.

Completed Image Attachment Window.

3.4.5.1.2 Attach Image Directly from TWAIN Device

1. To attach an image directly from your TWAIN device, click on the TWAIN button in the Image Attachment browser window to bring up the Acquire dialogue box.



Acquire Dialogue Box

2. Choose the correct TWAIN device from the drop down list (this could be your scanner, your digital camera, your card reader, etc.). Click on the Acquire button to import or scan the image. If you have the Show UI check box checked off, your normal User Interface for that device will come up and you can proceed normally from there.
3. Once the image has been obtained, click on the OK button in the Acquire dialogue box. **NOTE** If you do not click on the OK button, the image will not be available to you for attachment.
4. Enter in a Title and Description for the image to help you identify the item later.
5. If you are satisfied with this image, click on the Attach Image button to add this image to the record.
6. When you have finished attaching images, click on the Close button in the Image Attachment window.

3.4.5.2 View Attachments

1. Click on the Quotes & Invoicing button on the Menu Bar.
2. Select the appropriate Sub Menu button (Quotes, Work Orders or Invoicing) to find the record you need.
3. Search and find the appropriate record and double-click on the line.
4. Once the record is open, the Add Attachment and the View Attachment buttons will be displayed in the Sub Menu.
5. Click on the View Attachment button and the Attachments window will open in another browser window.

Attachments Window

6. Click on the View link next to the item you wish to view.
7. When you have finished reviewing this image, click on the Back to Menu button in your browser window to return to the Attachments window to view any remaining images.
8. When you have finished with your review, just close the Attachments window browser window.

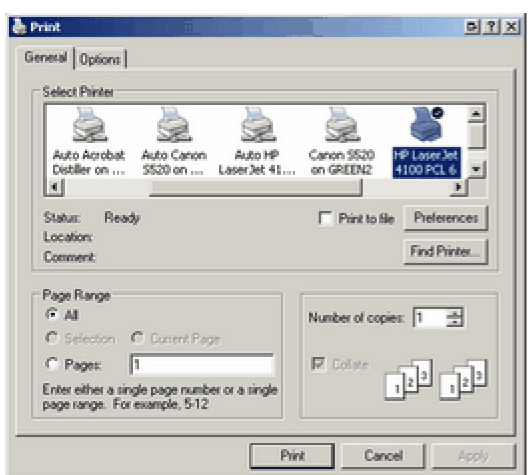
3.4.6 Print Work Order

eDirectGlass allows you to print Work Orders for In-house and Mobile use (please make sure you have followed all of the steps under Section1, *Getting Started* before you attempt to print any Work Orders).

1. Select a Work Order from the Work Order List.
2. Click on the Print Work Order button.
3. The Work Order Print Preview screen will open in a new browser window.
4. Click on the button on the report viewer toolbar located under your browser window address bar.

Report Viewer Toolbar

5. A print dialogue box will appear. Select the printer you wish to print to and click on the Print button.



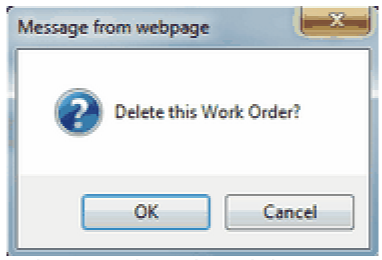
Print Dialogue Box

When you have finished printing, just close the report viewer browser window.

3.4.7 Delete Work Order

To delete a Work Order in eDirectGlass:

1. Open the Work Order.
2. Click on the Delete Work Order button.
3. A dialogue box will appear asking you if you want to delete the Work Order.



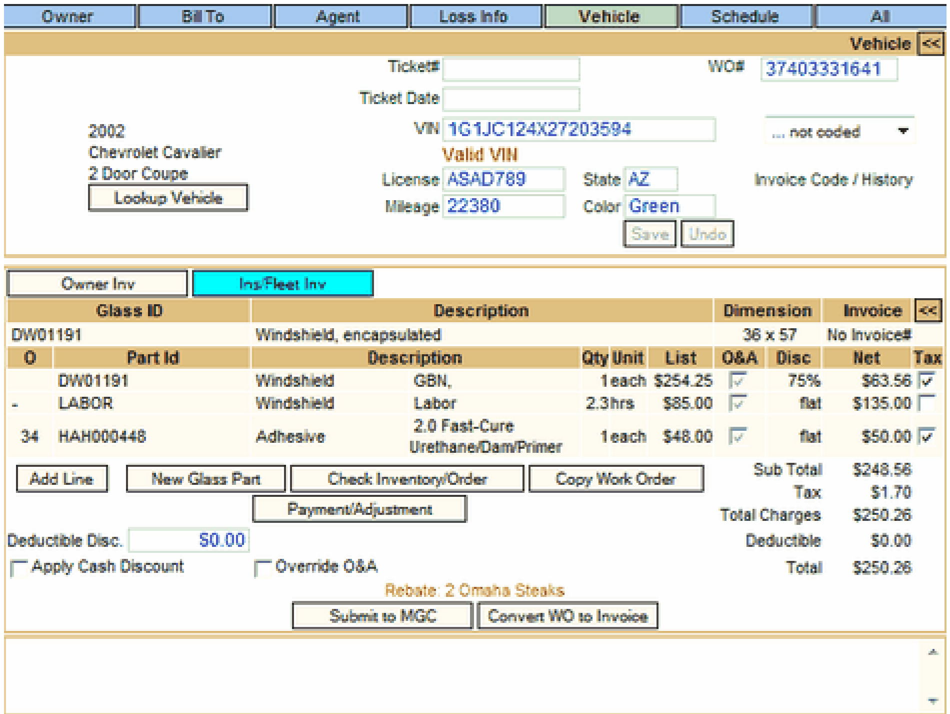
Delete Work Order Dialogue Box

4. Click on the OK button and the Work Order will be permanently deleted.

3.4.8 Converting Work Order to Invoice

When a Work Order has been completed, it must be converted to an Invoice so it can be billed appropriately. You can make any modifications to the Work Order that you wish or make changes in the Invoice process prior to submission. Once an invoice has been submitted, no changes can be made.

1. Open the Work Order and click on the **Schedule** tab button.
2. Click on the Completed ☑ check box and then click the Save button.
3. Click on the **Vehicle** tab button.
4. Click on the Convert WO to Invoice button and the Work Order will be converted to an Invoice and will take you to the Invoice Vehicle window.

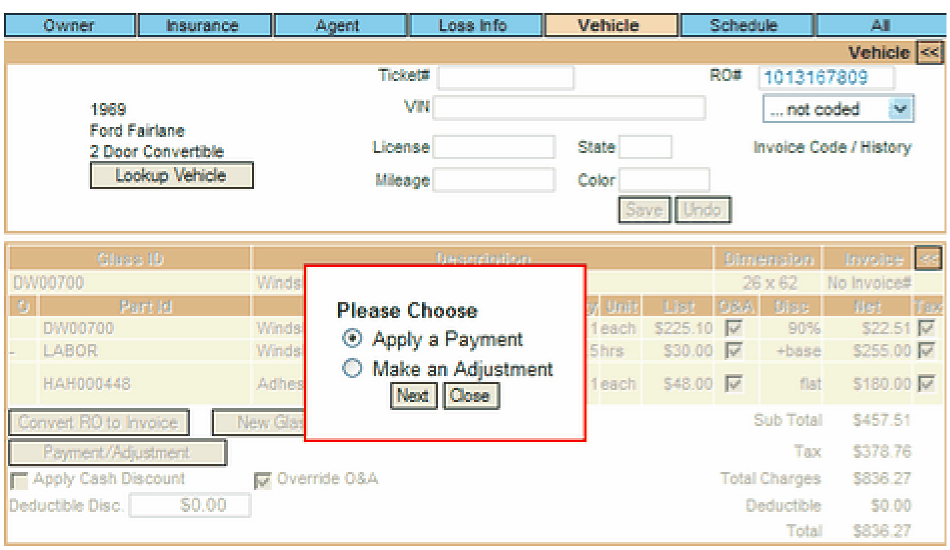


Invoice Vehicle Window

3.4.9 Apply A Payment or Make an Adjustment

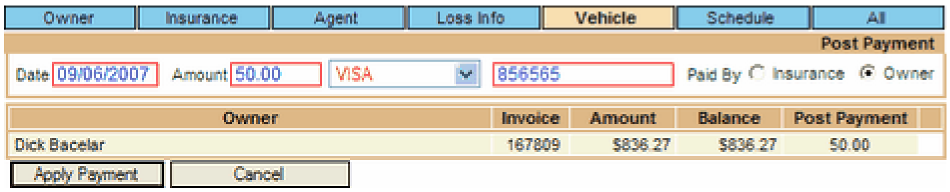
Once the record has been converted to a Work Order, you can also apply a payment or make an adjustment to the record directly from the **Vehicle** tab. You can also may a payment or apply an adjustment from the record once it has been converted to an Invoice. Payments and Adjustments can also be handled from the Accounting menu.

1. On the **Vehicle** tab of Work Order (or Invoice) record you wish to make a payment or adjustment to, click on the Payment/Adjustment button.
2. Choose either 'Apply a Payment' or 'Make an Adjustment'.



Payment/Adjustment Selection

3. If you selected 'Apply a Payment', enter the payment amount, select the payment type, enter the referral number and choose whether the 'Paid By' is Insurance or Owner and then click on the Apply Payment button.



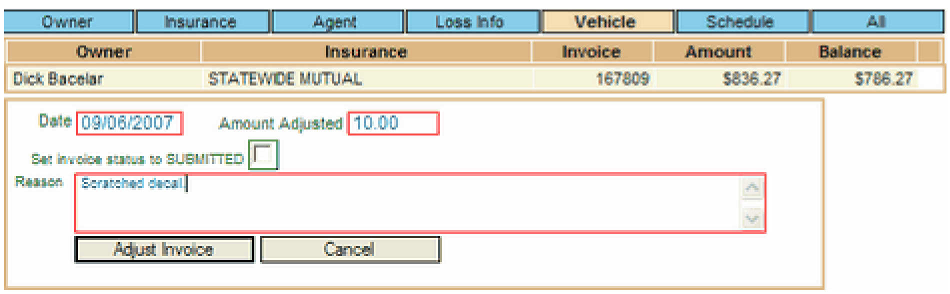
Apply a Payment from Work Order

4. You will then be taken back to the Vehicle tab of the Work Order record you were working with and will now see the Remittance box showing the payment you just applied.

Remittance					
Date Paid	Type	Check No	Paid By	Description	Amount
9/6/2007	VISA	856565	Owner	Payment	($50.00)
				Balance Due	$786.27

Remittance Box

5. If you selected 'Make an Adjustment', enter the Amount Adjusted (if you are adding an amount you will need to enter a negative number), and the Reason for the adjustment then click on the Adjust Invoice button.



Make an Adjustment from Work Order

6. You will then be taken back to the Vehicle tab of the Work Order record you were working with and will now see the Remittance box showing the adjustment you just applied.

Remittance					
Date Paid	Type	Check No	Paid By	Description	Amount
9/6/2007	VISA	856565	Owner	Payment	($50.00)
9/6/2007	Adjustment	Adjustment	NA	Scratched decal.	($10.00)
				Balance Due	$776.27

Remittance Box

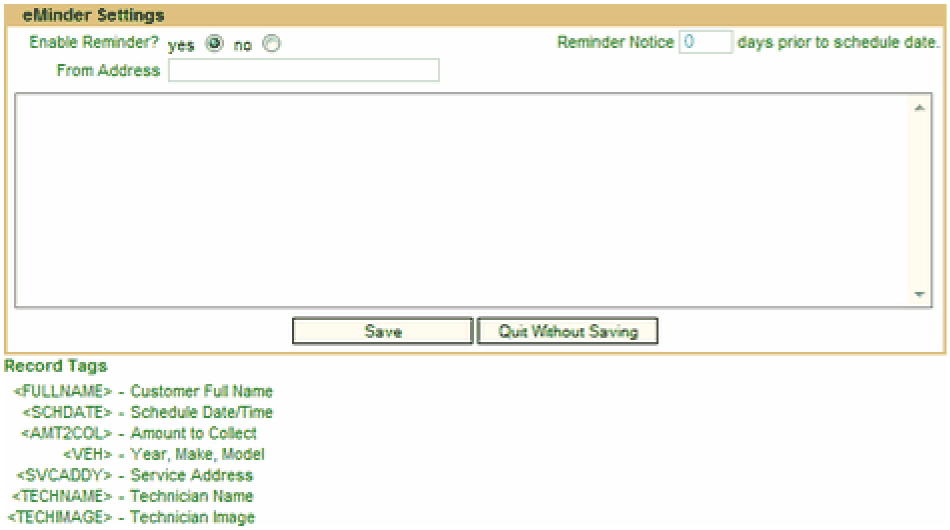
3.4.10 eMinder

eMinder is an email reminder system for all versions of eDirectGlass TSM. Once you have setup and enabled eMinder, all work orders that have a valid email address on the Owner Panel will be processed and an email will be dispatched with your appointment reminder.

Before you can take advantage of the eMinder system, you must first complete the one time SMTP information setup as described in the *System Administration* section of this manual.

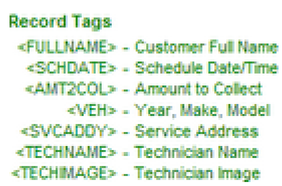
1. Click on Quotes & Invoicing, Work Orders and then on the eMinder Settings button to

access the eMinder Settings panel.



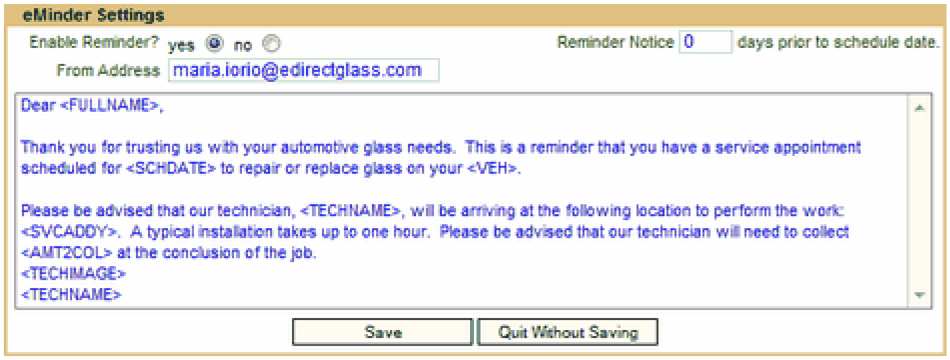
eMinder Settings Panel

2. To enable the eMinder system, click on the 'yes' radio button. If at any time in the future you wish to disable the eMinder service, simply return to this panel and click on the 'no' radio button.
3. In the Reminder Notice section, select the number (in days) that you would like the email reminder to be delivered prior to the scheduled date. You may enter 0 so that the reminder is send out without regard to the schedule date.
4. In the From Address field, enter a valid address that will be sent along with every email reminder. **Please Note:** **This email address is critical as it will be the address that your customers will see and potentially reply to. In addition, this email address will serve as the "bounce back" address should delivery of an appointment reminder fail.**
5. In the text box area, type your eMinder appointment message. You may use the included 'Record' Tags' to construct your message. For instance, to address the customer by name, you would type "Dear <FULLNAME>". You must type the Record Tag exactly as it appears on the screen.



eMinder Record Tags

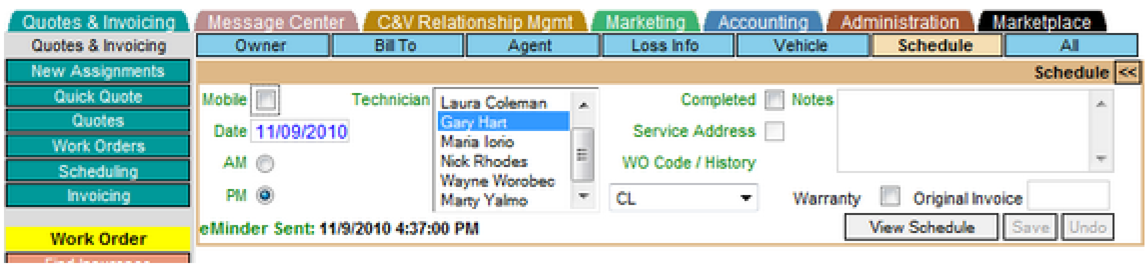
6. Once you have made any changes to this panel, click on the  button.
7. The eMinder system will automatically begin to process any applicable reminders based on your setup. You do not have to do anything else to begin to use eMinder.



eMinder Settings Panel - Completed

eMinder Notes

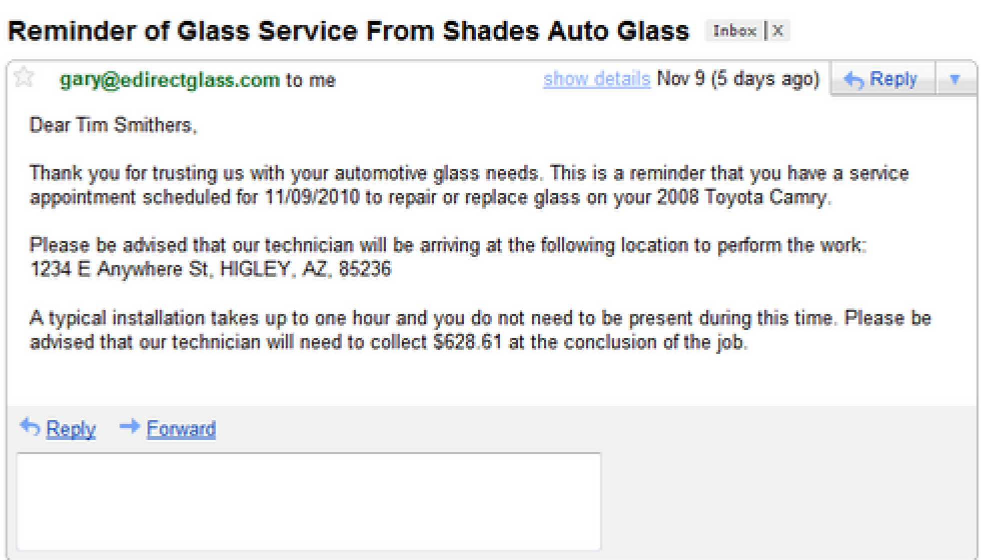
When an eMinder is sent for a work order in the system, you will see an indication on the Schedule tab of a work order showing the date and time that the eMinder was sent. **Please Note:** This time stamp is NOT an indication that the email was received by the recipient, only that it was sent by the system. You MUST check the email address you indicated in the From Address field of the eMinder setup for any email errors or replies.



Schedule Tab with eMinder Date & Time Stamp

If there is no Service Address provided in the work order, the system will use the address information found on the Owner tab.

Here is a sample email of an actual eMinder sent to a Gmail account:



3.5 Scheduling

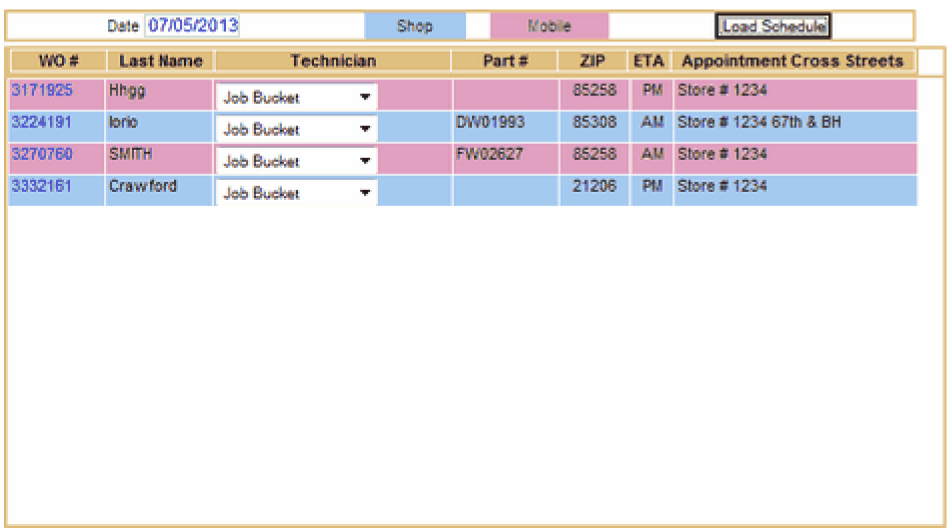
The Scheduling module allows you to review your production schedule for a specific date or range of dates and allows you to see your entire In-House and Mobile schedule.

3.5.1 Create Schedule

The Create Schedule feature allows you to assign and/or reassign technician for a specific date all on one screen. It may also be useful to you to create a technician that is named 'Job Bucket' or 'Unrouted', and have all jobs initially assigned to that 'technician'. This will allow a routing expert within your company to later use the Create Schedule feature fully.

To access create schedule, click on Quotes & Invoicing and then on Create Schedule to access the Create Schedule date selection panel.

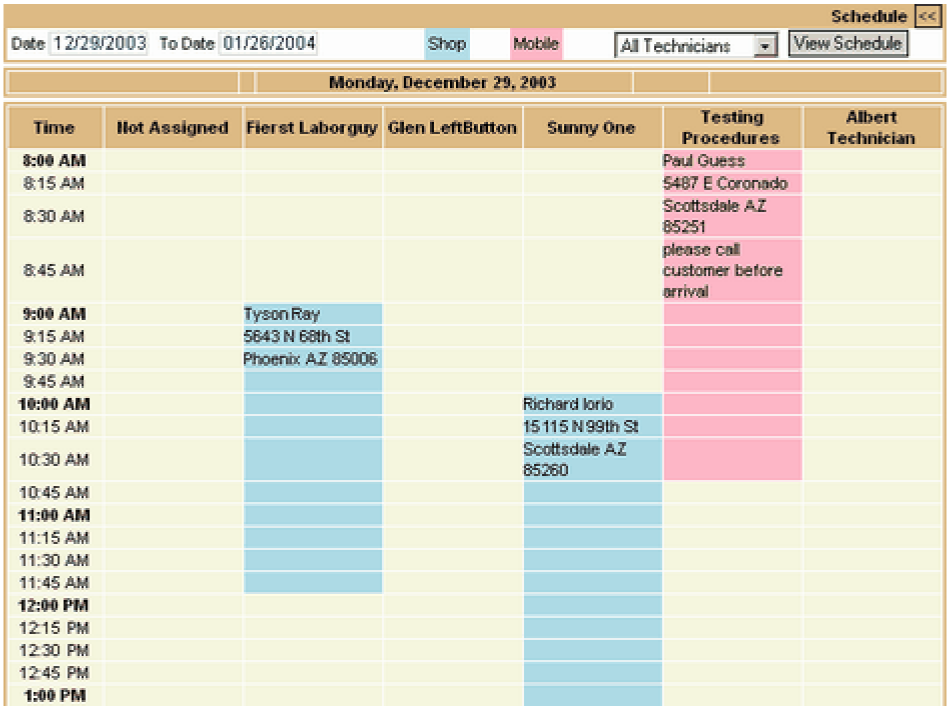
Once you click on the date you wish to route, click on the Load Schedule button to display the list of all jobs that are scheduled for the day you selected.



From this screen, you only need to select the new technician from the drop down list and it will automatically update the record with the new technician name selected.

3.5.2 Viewing Schedule

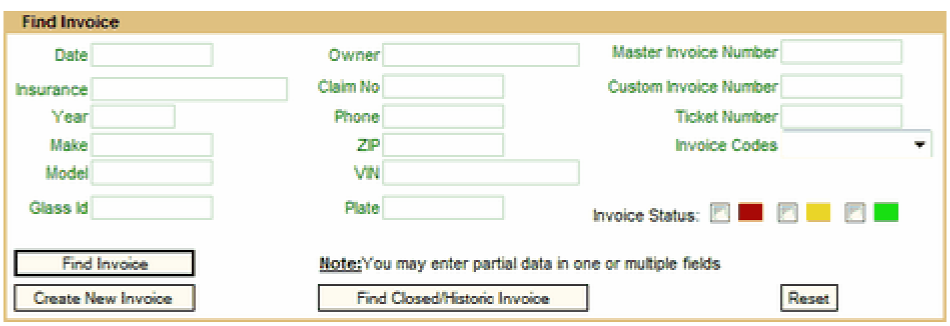
1. Click on the Scheduling button in the Quotes & Invoicing Sub Menu.
2. Select a Date Range by clicking on the Date field, choosing the start date, clicking in the To Date field and choosing the end date of the schedule you wish to display. You can also choose to display the schedule for one particular technician (the schedule defaults to All Technicians) by choosing that Technician's name from the drop down list and clicking on the View Schedule button.
3. The Schedule for the selected dates will display.



Schedule View

3.6 Invoicing

Probably the most important module in eDirectGlass, Invoicing allows you to directly bill your business partners or clients. To work with the Invoicing module, click on the Invoicing button in the Quotes & Invoicing Sub Menu. The Find Invoice window will appear in the Work Area.

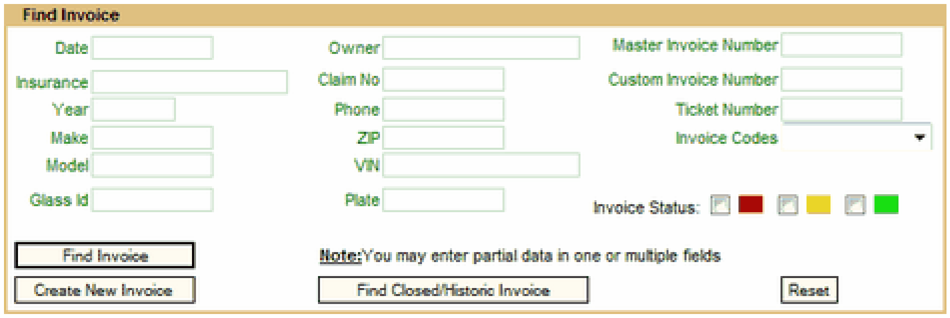


Find Invoice Window

3.6.1 Open an Invoice

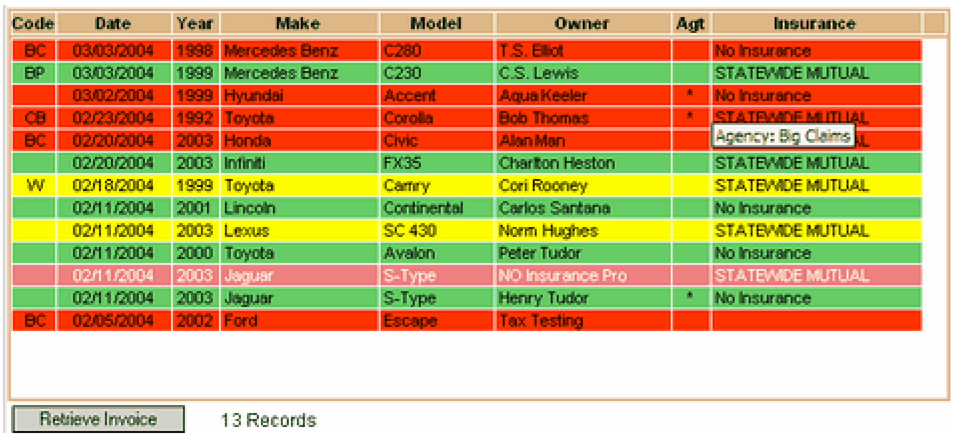
To open and work with an Invoice:

1. Click on the Invoicing button in the Sub Menu to open the Find Invoice window.



Find Invoice Window

2. In the Find Invoice window, enter the search information to locate the specific Invoice you wish to work with. To see all Invoices, just click on the Find Invoice button and the list of Invoices will display in the Work Area.



Code	Date	Year	Make	Model	Owner	Agt	Insurance
BC	03/03/2004	1998	Mercedes Benz	C280	T.S. Elliot		No Insurance
BP	03/03/2004	1999	Mercedes Benz	C230	C.S. Lewis		STATEWIDE MUTUAL
	03/02/2004	1999	Hyundai	Accent	Aqua Keeler	*	No Insurance
CB	02/23/2004	1992	Toyota	Corolla	Bob Thomas	*	STATEWIDE MUTUAL
BC	02/20/2004	2003	Honda	Civic	Alan Man		Agency: Big Claims
	02/20/2004	2003	Infiniti	FX35	Charlton Heston		STATEWIDE MUTUAL
W	02/18/2004	1999	Toyota	Camry	Cori Rooney		STATEWIDE MUTUAL
	02/11/2004	2001	Lincoln	Continental	Carlos Santana		No Insurance
	02/11/2004	2003	Lexus	SC 430	Norm Hughes		STATEWIDE MUTUAL
	02/11/2004	2000	Toyota	Avalon	Peter Tudor		No Insurance
	02/11/2004	2003	Jaguar	S-Type	NO Insurance Pro		STATEWIDE MUTUAL
	02/11/2004	2003	Jaguar	S-Type	Henry Tudor	*	No Insurance
BC	02/05/2004	2002	Ford	Escape	Tax Testing		

Retrieve Invoice 13 Records

Invoice List

3. Double-click on the Invoice you wish to open or single-click on an Invoice and click on the Retrieve Invoice button and the Invoice will open.

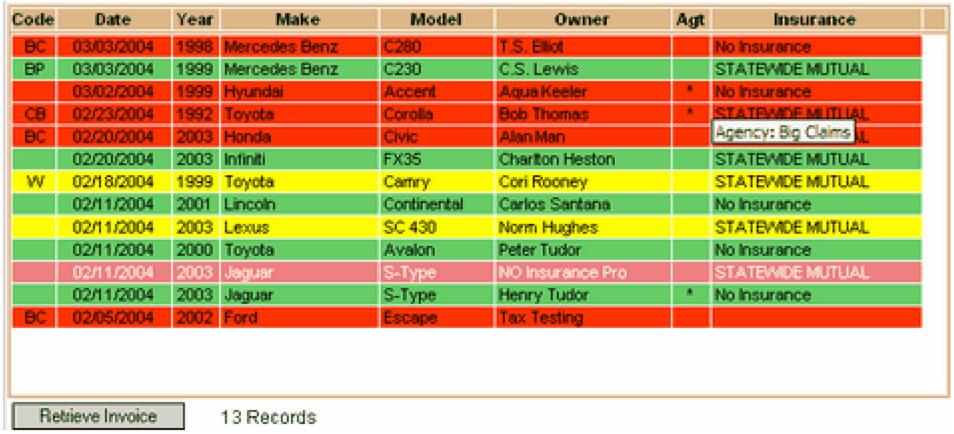
NOTE: On the Invoice List, you will notice a column marked Agt. This column will contain an asterisk (*) if the Invoice began as an Assignment sent to your shop through the eDirectGlass system. If you place your mouse over the asterisk, you will be able to see which Agency sent this particular invoice to you.

Any invoice that has a balance of $0 and/or has been exported to QuickBooks using the eDirectGlass QuickBooks export feature, will only be able to be displayed under Invoicing by entering search criteria in the Find Invoice Window and clicking on the Find Closed/Historic Invoice button.

3.6.1.1 Invoice List Color Coding

The Invoice list is color coded for easy identification of items that require attention.

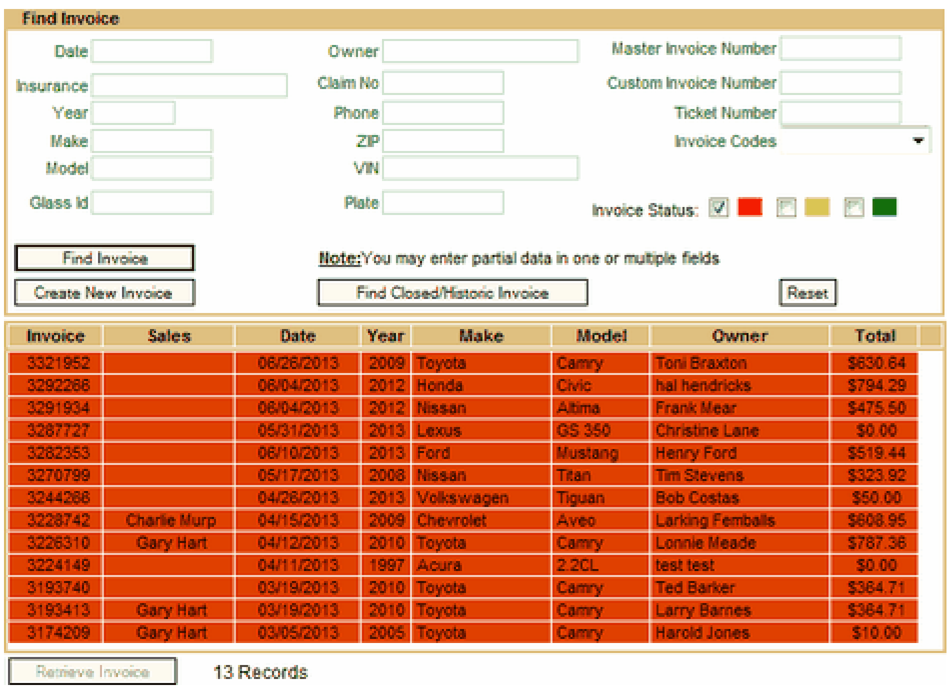
- Red - indicates Invoices that have not been submitted.
- Yellow - indicates Invoices that have a rejected status. If you hover your mouse over the Insurance column of a rejected invoice, you will be able to view the reject reason.
- Green - indicates Invoices that have been submitted and do not have a rejected status.



Code	Date	Year	Make	Model	Owner	Agt	Insurance
BC	03/03/2004	1998	Mercedes Benz	C280	T.S. Elliot		No Insurance
BP	03/03/2004	1999	Mercedes Benz	C230	C.S. Lewis		STATEWIDE MUTUAL
	03/02/2004	1999	Hyundai	Accent	Aqua Keeler	*	No Insurance
CB	02/23/2004	1992	Toyota	Corolla	Bob Thomas	*	STATEWIDE MUTUAL
BC	02/20/2004	2003	Honda	Civic	Alan Man		Agency: Big Claims
	02/20/2004	2003	Infiniti	FX35	Charlton Heston		STATEWIDE MUTUAL
W	02/18/2004	1999	Toyota	Camry	Cori Rooney		STATEWIDE MUTUAL
	02/11/2004	2001	Lincoln	Continental	Carlos Santana		No Insurance
	02/11/2004	2003	Lexus	SC 430	Norm Hughes		STATEWIDE MUTUAL
	02/11/2004	2000	Toyota	Avalon	Peter Tudor		No Insurance
	02/11/2004	2003	Jaguar	S-Type	NO Insurance Pro		STATEWIDE MUTUAL
	02/11/2004	2003	Jaguar	S-Type	Henry Tudor	*	No Insurance
BC	02/05/2004	2002	Ford	Escape	Tax Testing		

Invoice List

In the Find Invoice window, you may click on any combination of the color coding check boxes then clicking on the Find Invoice button to display only the invoices that meet those requirements (e.g., display only Invoices that have not been submitted).



Invoice	Sales	Date	Year	Make	Model	Owner	Total
3321952		06/26/2013	2009	Toyota	Camry	Toni Braxton	$630.64
3292266		06/04/2013	2012	Honda	Civic	hal hendricks	$794.29
3291934		06/04/2013	2012	Nissan	Altima	Frank Mear	$475.50
3287727		05/31/2013	2013	Lexus	GS 350	Christine Lane	$0.00
3282353		06/10/2013	2013	Ford	Mustang	Henry Ford	$519.44
3270799		05/17/2013	2008	Nissan	Titan	Tim Stevens	$323.92
3244266		04/26/2013	2013	Volkswagen	Tiguan	Bob Costas	$50.00
3228742	Charlie Murp	04/15/2013	2009	Chevrolet	Aveo	Larking Femballs	$608.95
3226310	Gary Hart	04/12/2013	2010	Toyota	Camry	Lonnie Meade	$787.36
3224149		04/11/2013	1997	Acura	2.2CL	test test	$0.00
3193740		03/19/2013	2010	Toyota	Camry	Ted Barker	$364.71
3193413	Gary Hart	03/19/2013	2010	Toyota	Camry	Larry Barnes	$364.71
3174209	Gary Hart	03/05/2013	2005	Toyota	Camry	Harold Jones	$10.00

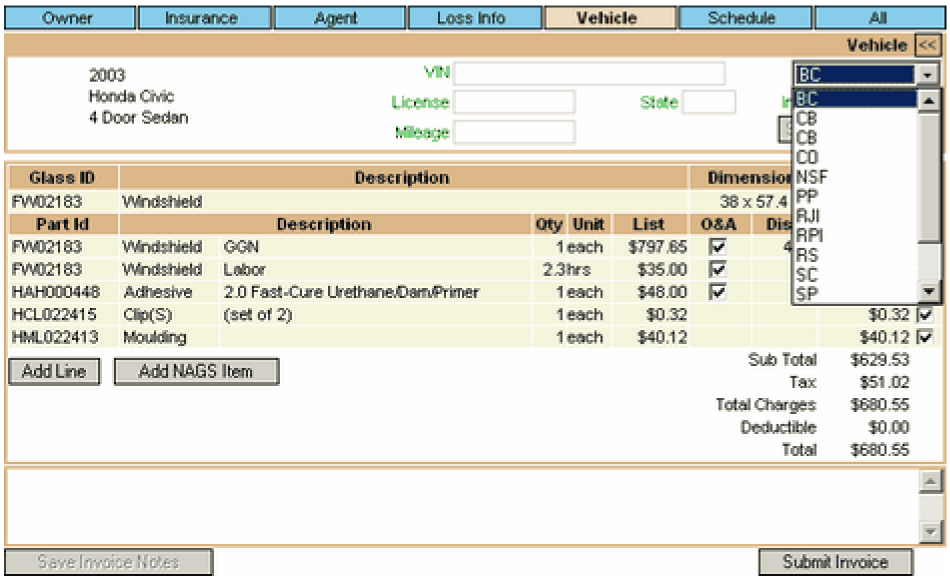
Displaying Red Color Coded Invoices Only

3.6.2 Using Invoice Codes

This section will discuss using and tracking the Invoice Codes you added during the eDirectGlass Administration set up. These codes will help you keep track of your outstanding Invoices and their status.

3.6.2.1 Applying Invoice Codes

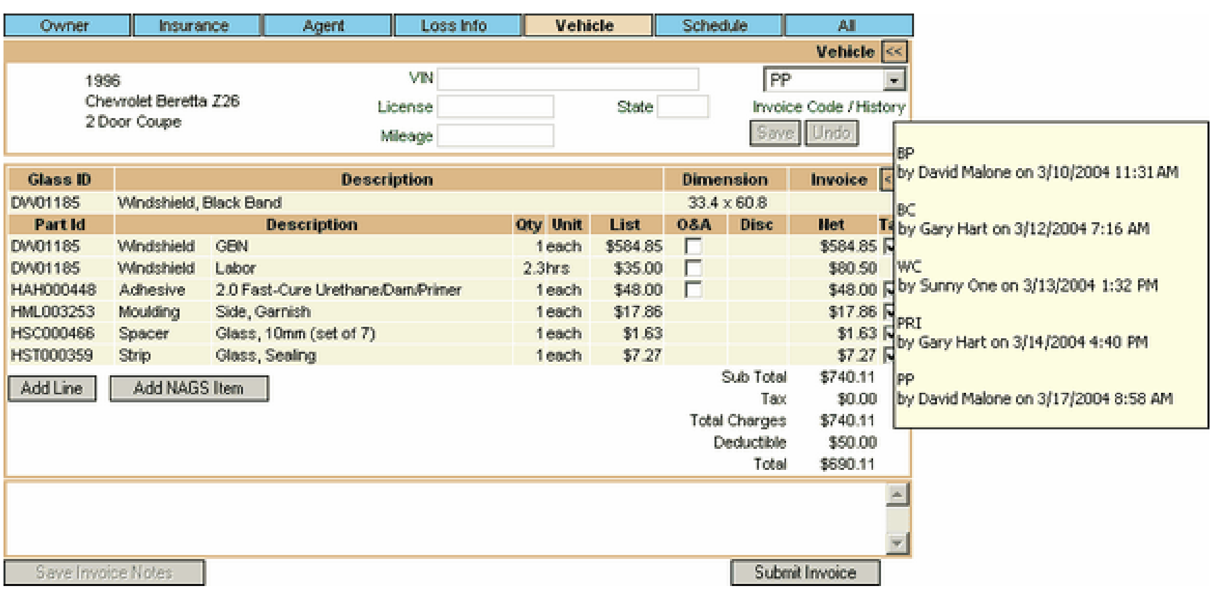
The Vehicle tab is the screen where you will update the Invoice Code for this particular Invoice. Just select the appropriate Invoice Code from the drop down list and click on the Save button.



Invoice Codes Drop Down List

3.6.2.2 Invoice Code History View

You can also view the history of the Invoice Code changes by placing your mouse over the Invoice Code / History header to show the user name and date & time stamp of the Invoice Code change(s).



Invoice Code History View

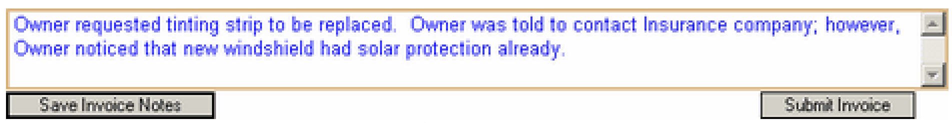
3.6.3 Finalize an Invoice

Before you submit an Invoice for billing purposes, make sure that you make any necessary modifications, additions or deletions to the invoice.

Verify all of the information in the Owner, Insurance, Loss Info and Vehicle areas. Pay very close attention to line item details and O&A rules compliance.

NOTE: If you are not submitting this invoice to an insurance company, make sure you have clicked on the No Insurance button on the Insurance tab.

You can add notes to the Invoice in the Notes Box located at the bottom of the Vehicle window. Place any comments that you want others to read in this box. Unlike the Notes in the Schedule Notes box, these notes can be viewed by anyone who receives this Invoice.



Invoice Notes Box

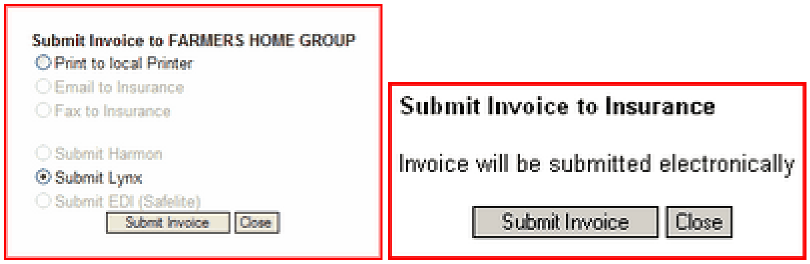
When you have finished adding Notes, click on the Save Invoice Notes button to save the newly added notation.

NOTE: ***Once you submit an Invoice for billing, you cannot make changes to the Invoice.***

3.6.4 Submit an Invoice

eDirectGlass has several methods for submitting an Invoice for Billing:

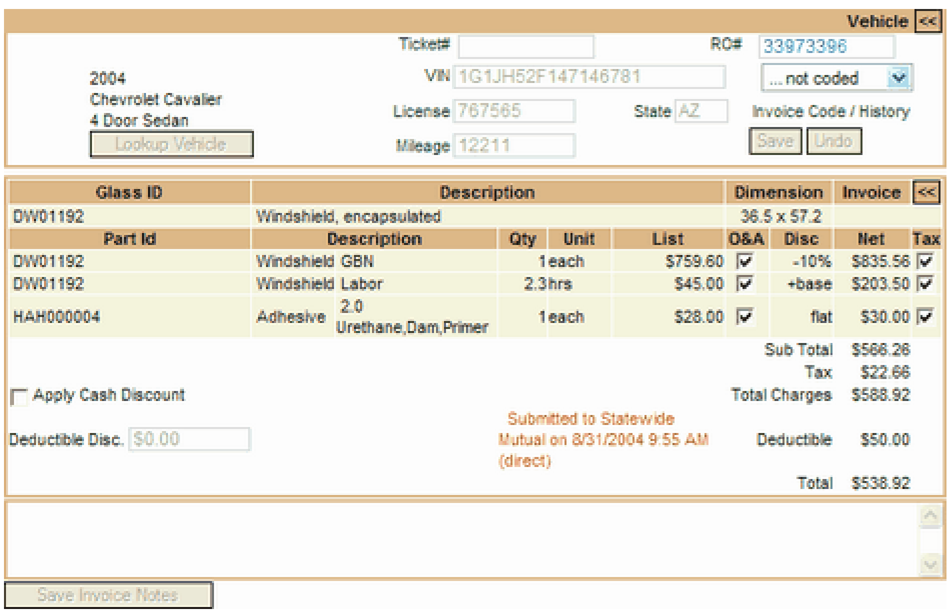
1. Electronic - If the assignment was electronically sent to your account, it will automatically be set to return electronically to the originator of the assignment. An Invoice can also be sent electronically if the Insurance or Agency profile contains information for direct electronic billing. If Electronic Billing is not supported, it will not be a selectable item when submitting an Invoice and the other listed methods for submission will be displayed.
2. Printing - This method will print the Invoice with remittance advice and then lock the Invoice as submitted. **NOTE: If you are not ready to submit this invoice (you may wish to still make changes to it), but you would like to have a printed copy, DO NOT select the Print to local Printer under Submit Invoice. Simply click on the Print Invoice button in the Sub Menu which will not affect the submission status of the invoice.**
3. E-mail - This method will submit the Invoice via E-mail. This selection will only be available if the party who is receiving the Invoice has marked this as an acceptable way to receive Invoices or if it is in the Vendor profile that you maintain (Insurance Contact in the C&V Relationship Module).
4. Fax - This method will submit the Invoice via Fax. This selection will only be available if the party who is receiving the Invoice has marked this as an acceptable way to receive Invoices or if it is in the Vendor profile that you maintain (Insurance Contact in the C&V Relationship Module).
5. EDI (Lynx, Harmon, Quest, Teleglass, etc.) - This method will allow you to submit your invoices to carriers that require submission electronically. This option will only be active if the Insurance company you have selected on the Bill To tab has a C&V Relationship Mgmt record set up and has the correct, appropriate Network selected and saved.



Invoice Submission Methods

Once you have finalized the Invoice, click on the Submit Invoice button at the bottom of the Vehicle display. Select the method to submit the invoice and once again, click on the Submit Invoice button located in the method box. If it is submitted successfully, you will receive a message in the Parts window that contains the submission information. This stamp is in red.

NOTE: ***Once you submit an Invoice for billing, you cannot make changes to the Invoice.***



Submitted Invoice Message

3.6.5 Print an Invoice

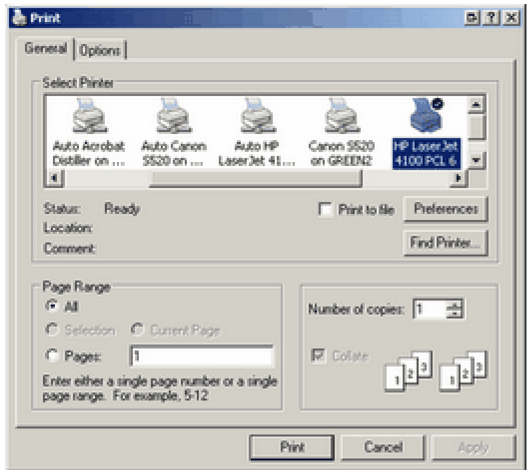
eDirectGlass allows you to print an Invoice prior to and after submission (please make sure you have followed all of the steps under Section 1, *Getting Started* before you attempt to print any Invoices).

1. Select an Invoice from the Invoice List.
2. Click on the Print Invoice button.
3. The Invoice Print Preview screen will open in a new browser window.
4. Click on the button on the report viewer toolbar located under your browser window address bar.

Report Viewer Toolbar

5. A print dialogue box will appear. Select the printer you wish to print to and click on the

Print button.



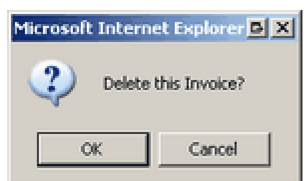
Print Dialogue Box

When you have finished printing, just close the report viewer browser window.

3.6.6 Delete an Invoice

To delete an Invoice in eDirectGlass:

1. Open an Invoice.
2. Click on the Delete Invoice button.
3. A dialogue box will appear asking you if you want to delete the Invoice.



Delete Invoice Dialogue Box

4. Click on the OK button and the Invoice will be permanently deleted.

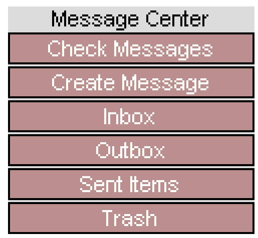
NOTE: ***Once you submit an Invoice, you cannot delete it. You must adjust the invoice to a zero balance in the Accounting Module.***

Part 4

4 Message Center

This chapter provides instructions for working with the eDirectGlass Message Center. The Message Center provides two-way communication with business partners (only with business partners who are using the eDirectGlass system) focused around the claim. Everything from inquires to exception requests can be made using this module.

Clicking on the Message Center button on the Menu Bar displays the following Sub Menu:



Message Center Sub Menu

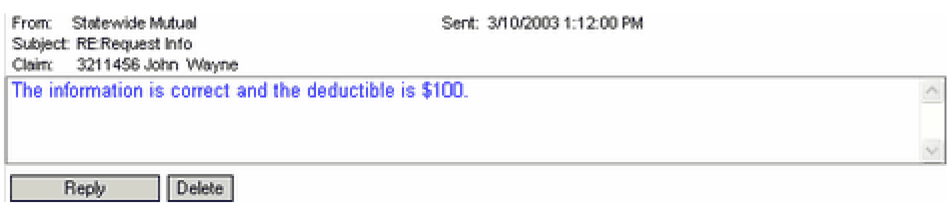
4.1 Check Messages

eDirectGlass automatically checks for new Messages every 10 minutes and will notify you if new mail arrives. A New Messages text will appear under your login name in the upper right hand corner of the screen when you have New Messages. At any time, you can click on the Check Messages button to check for and review new messages.

Check Messages			
From	Subject	Claim	Sent
Statewide Mutual	RE:Request Info	3211456 John Wayne	3/10/2003 1:12:00 PM

Check Messages Window

To review a new message, click on the message line and the message will open in the Work Area.



Review New Message Window

You can either Reply to this message now or simply continue to work elsewhere in eDirectGlass.

Once a new message has been reviewed, it is automatically moved to the Inbox.

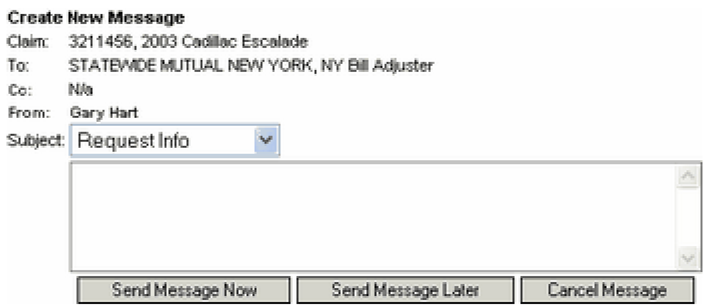
4.2 Create Message

You may only create a message for an assignment that came down to your shop through eDirectGlass from an Insurance Company, Fleet Company or TPA using eDirectGlass. To create a new message, you have two options:

The first option requires you to open a New Assignment, Quote, Repair Order or Invoice. Once one of these is open, you can click on the Message Center button on the Menu Bar and then click on the Create Message button.

The second option also requires you to first open a New Assignment, Quote, Repair Order or Invoice. Once one of these items is open, you can click on the New Message button in the Sub Menu in the respective module Sub Menu.

Once you have clicked on the Create Message button or the New Message button, the Create New Message window displays in the Work Area.



Create New Message Box

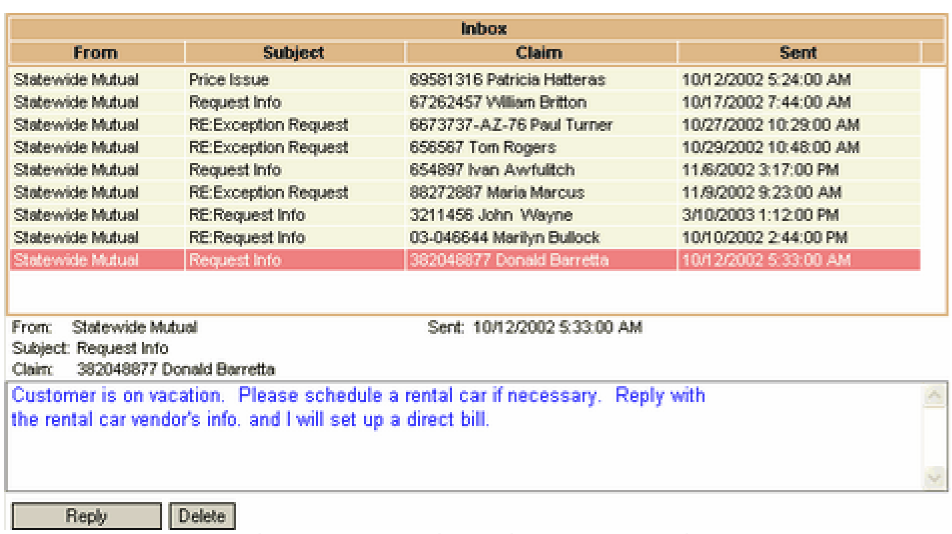
The Claim, To, Cc and From fields cannot be changed. These fields are populated with the information from the specific item (Quote, Repair Order or Invoice) you have selected. In the Subject field, select the type of message you want to send. There are 6 Subjects to choose from: Request Info, Price Issue, Accepted Invoice, Rejected Invoice, Exception Request and Other.

In the message window, type the message you wish the recipient to read. When you are satisfied with your message, and you want to send it, click on the Send Message Now button and the message will be instantly sent. If you are interrupted or if you want to finish the message later, click on the Send Message Later button and the message will be moved to the Outbox where you can work with it at a later time.

If you do not want to send the message at all, click on the Cancel Message button.

4.3 Inbox

The Inbox contains all of your received messages. To review a message, simply click on the message line item. The message will display in the Work Area below the Inbox Message List.



Inbox Message List and Message Review

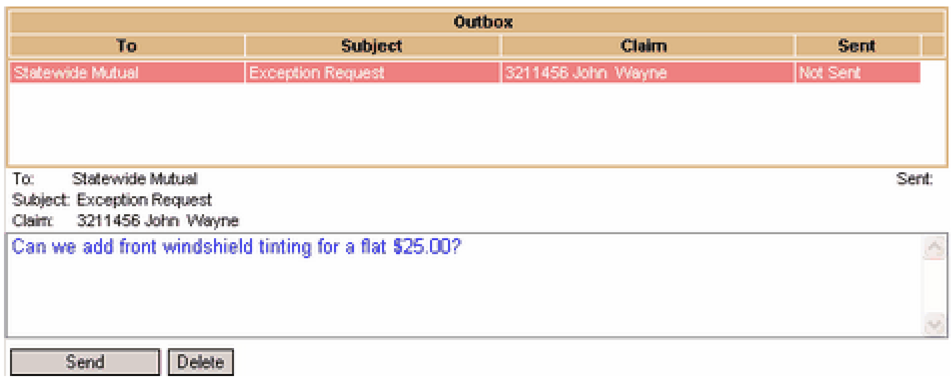
You can either Reply to this message now or simply continue to work elsewhere in eDirectGlass. When a claim is archived in eDirectGlass, the message(s) pertaining to that claim will disappear from the Inbox.

Messages can be sorted in any order by clicking on any one of the following tabs to sort by ascending or descending alphabetical or date range:

Inbox Message List Tab Sort Order

4.4 Outbox

The Outbox contains messages that were previously created but not sent. These messages are listed in the Outbox Message list. To complete or review one of these messages, simply click on the message and it will be displayed in the Work Area.

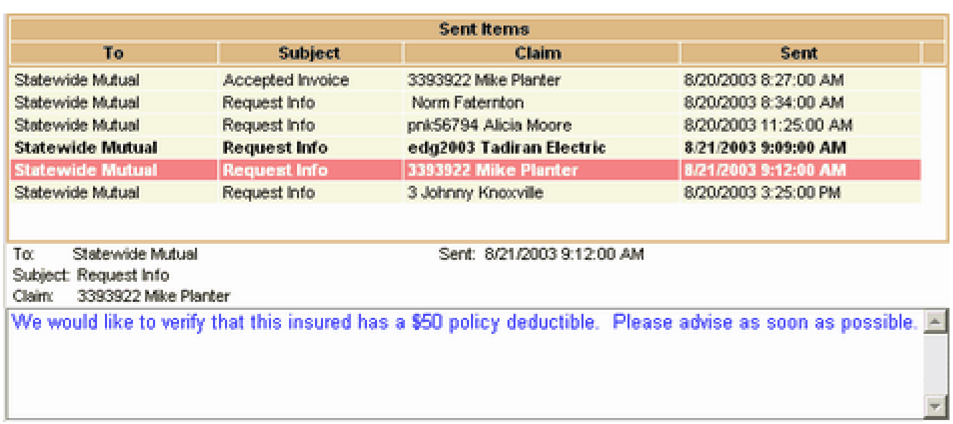


Outbox Message List with Message Review

When you are satisfied with your message and you want to send it, click on the Send button and the message will be instantly sent. You may also delete the message permanently by clicking on the Delete button. Otherwise, you may continue to work elsewhere in eDirectGlass.

4.5 Sent Items

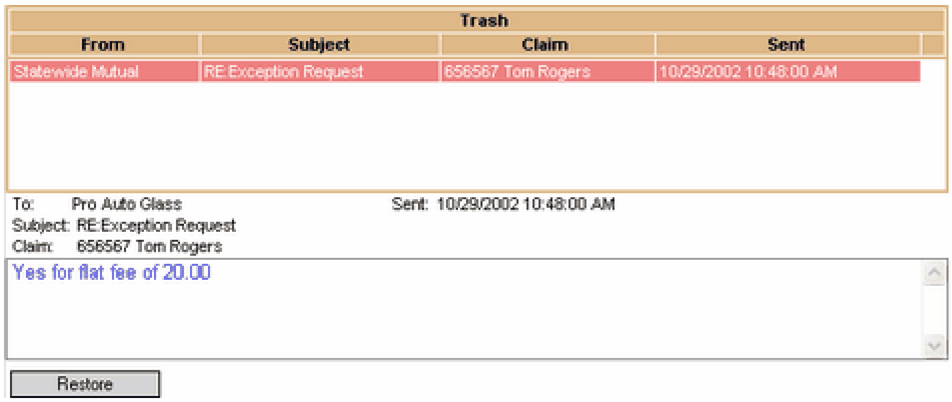
The Sent Items folder contains all of the messages that have been sent. Messages that belong to claims that have been archived will not be displayed. To review a sent message, click on the message line and it will display in the Work Area.



Sent Items Review

4.6 Trash

The Trash folder contains messages that you have received and deleted. To review the items in the Trash, click on a message line and the message will open in the Work Area.



Trash Folder Message Review

You can restore any of the messages in the Trash folder. Open the message and click on the 

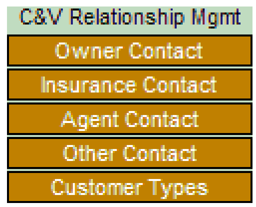
button and the message will be moved to the Inbox.

Part 5

5 C & V Relationship Mgmt

This chapter provides instructions for working with the eDirectGlass Customer & Vendor Relationship Management module. C&V Management allows you to work with Customer and Vendor contact information. Contact management allows you to keep detailed information on your business partners. eDirectGlass has enhanced contact management for the automotive glass industry. The C&V Relationship Management module is also where you enter and maintain the O&A Rules associated with the Insurance companies with whom you do business.

Clicking on the C&V Relationship Mgmt button on the Menu Bar displays the following Sub Menu:



C&V Relationship Mgmt Sub Menu

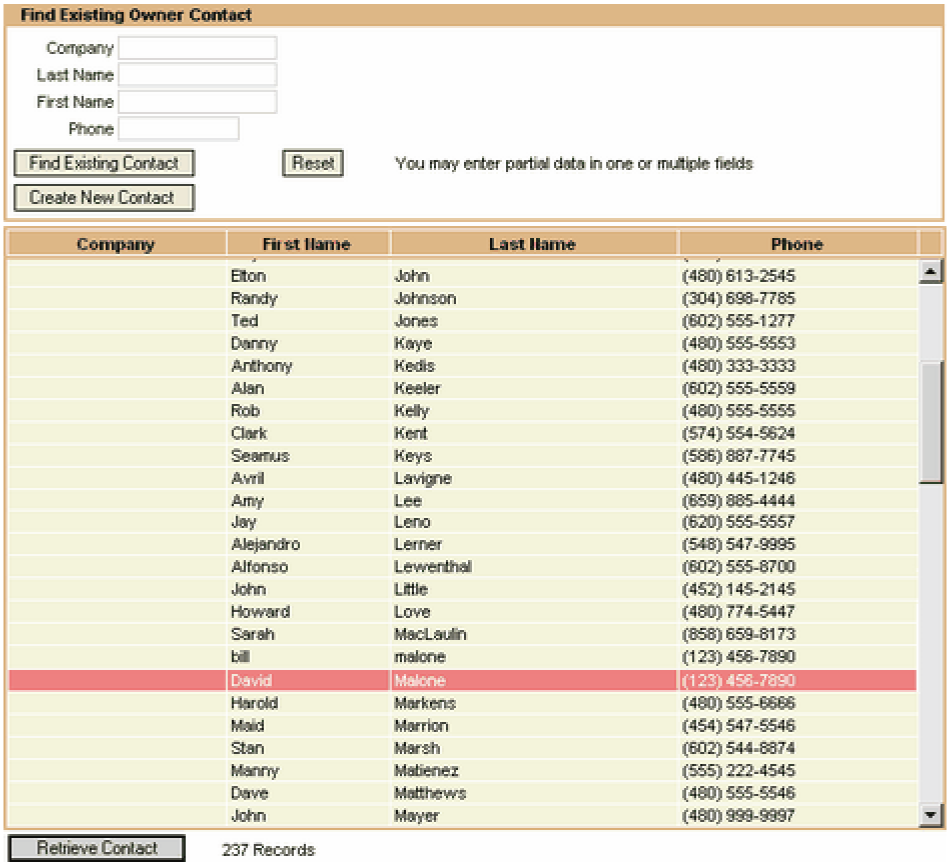
5.1 Owner Contact

The Owner section in C&V Relationship Management allows you to manage and store information about your customers that is above and beyond the information contained in Quotes and Invoices. An Owner Contact Record is automatically created in the eDirectGlass system when a claim is initiated by either creating a Quote or Accepting an Assignment.

5.1.1 Working with Owner Contacts

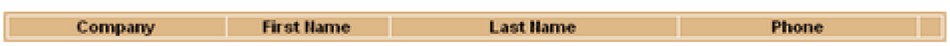
To work with an existing Owner contact, click on the Owner Contact button and the Find Existing Owner Contact window displays in the Work Area.

Enter the search information for the contact you are looking for and/or click the Find Existing Contact button to list all of the contacts in your database. When you locate the contact record you want to work with, you can either double-click it or single-click the line to highlight the record and select the Retrieve Contact button to open the contact record.



Retrieve Owner Record

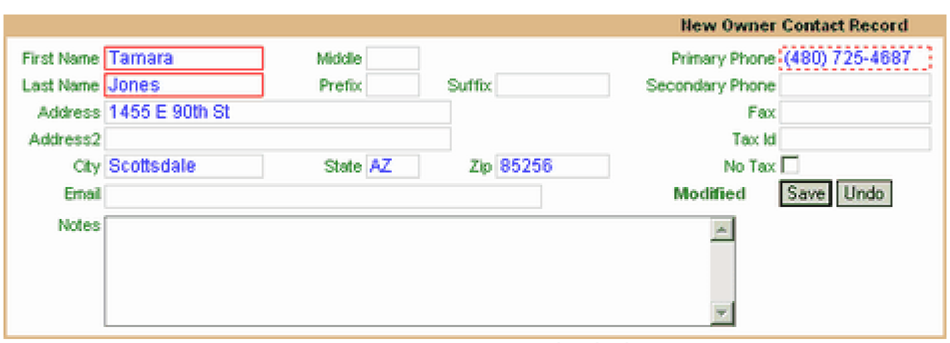
You can also sort the entire list of contacts by clicking on any of the column headers after clicking on the Find Existing Contact button.



Owner Contact Column Headers - Sort Tabs

5.1.2 Maintaining the Owner Record

After you have selected the contact record and have retrieved it, the Owner Contact Record window will open in the Work Area.



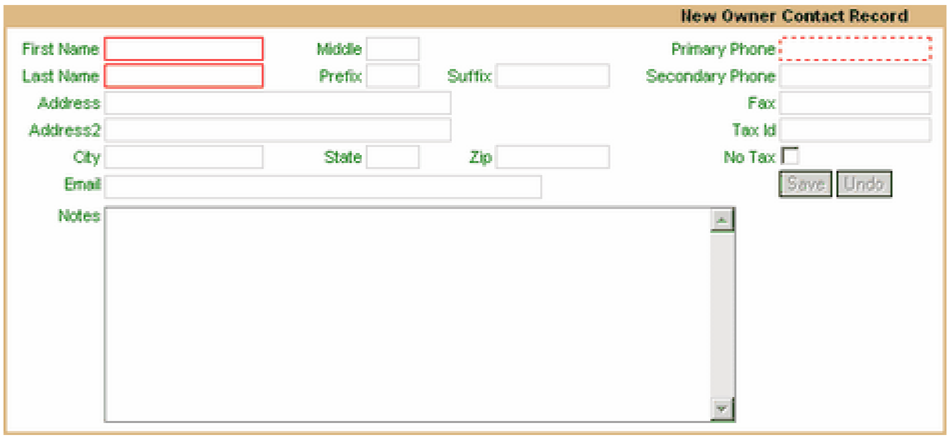
Owner Contact Record Window

You can edit any of the information in the contact record. In addition, you can also add Notes to the contact record. The Notes will not show up in any location other than in the C&V Relationship Management area. When you are finished making changes to the contact record, click on the Save button to save the modifications.

5.1.3 Creating a New Owner Contact

To create a New Owner Contact, click on either the Create New Contact button in the Find Existing Owner Contact window or click on the New Contact button in the Owner Contact Sub Menu.

After you click either button, a blank New Owner Contact Record window will display in the Work Area.



New Owner Contact Record

1. Enter all of the contact information. First and Last names are required, as indicated by the solid red boxes.
2. Enter at least one telephone number, as indicated by the dotted-line red boxes.
3. If you have any Notes, enter them in the Notes box.
4. Click on the Save button to save the modifications and new record.

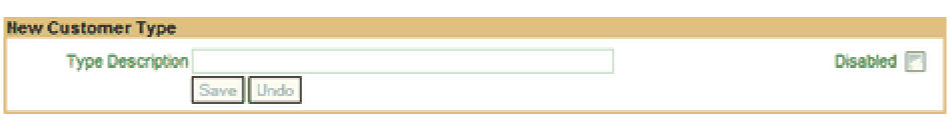
5.1.4 Customer Types

eDirectGlass allows you to designate a "type" for any given customer. This feature gives you the ability to build a list of Customer Types that will meet the needs of your shop. To maintain the list of Customer Types:

1. Click on the C&V Relationship Mgmt tab to access the C&V Relationship Mgmt sub menu. From here, click on the Customer Types button to display the Find Customer Type panel.

Find Customer Type Panel

2. From here, you can either add new customer types or maintain your existing list. To add a new type, click on the Add Type button to bring up the New Customer Type panel.



New Customer Type Panel

3. Simply enter the new type (i.e., Fleet Company, Commercial, Municipality, etc.) in the Type Description field and click on the Save button to add it to your list of Customer Types.

New Customer Type Panel Completed

4. To display/maintain your existing list of Customer Types, click on the Find Type button to show the entire list or enter information in the Type field and click on the Find Type button to show only records that will match your search criteria.

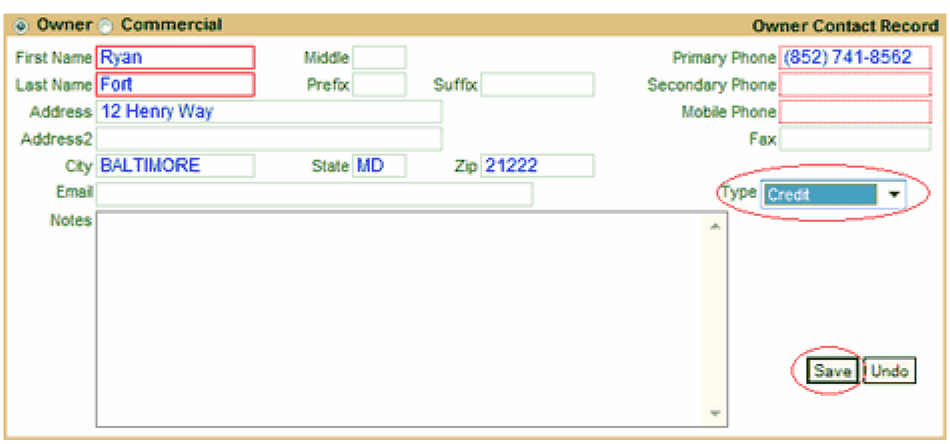
Find Customer Type List

5. To disable a Customer Type, either highlight the line and click on the Edit Type button or simply double-click on the line you wish to maintain to bring up the Edit Customer Type panel.

Edit Customer Type Panel

6. For the purpose of historical data, you can only disable a Customer Type, you can't change the Type Description or delete a Customer Type, you can only disable it. To disable the Customer Type check the Disabled ☑ box and click on the Save button to remove it from the drop down list.

7. To assign a type to a customer, simply open the contact record by click on C&V Relationship Mgmt, Owner Contact, search for the record and bring up the Owner Contact Record. Select the Customer Type from the drop down menu and click on the Save button to apply the Customer Type to the Owner Contact Record.



5.2 Insurance Contact

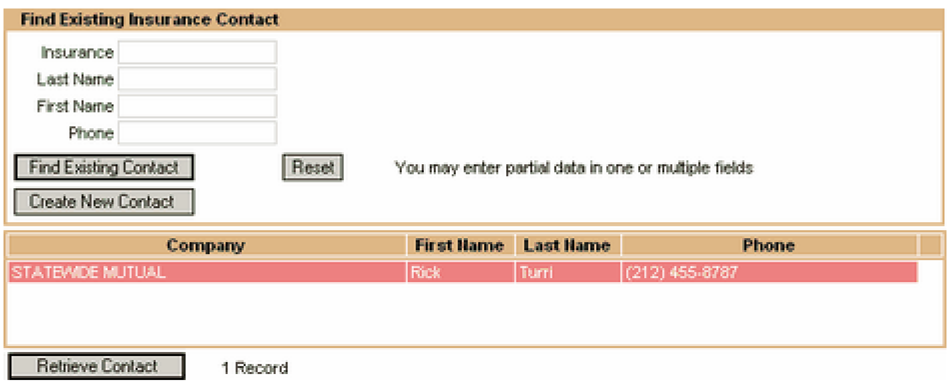
The Insurance section in C&V Relationship Management allows you to manage and store information about your business partners that is above and beyond the information contained in Quotes & Invoicing. This is also where you will add and maintain the O&A Rules associated with each of the insurance companies with whom you do business.

Note: ***You can only have one Insurance Contact Record in the eDirectGlass system per insurance company.***

5.2.1 Working with Insurance Contacts

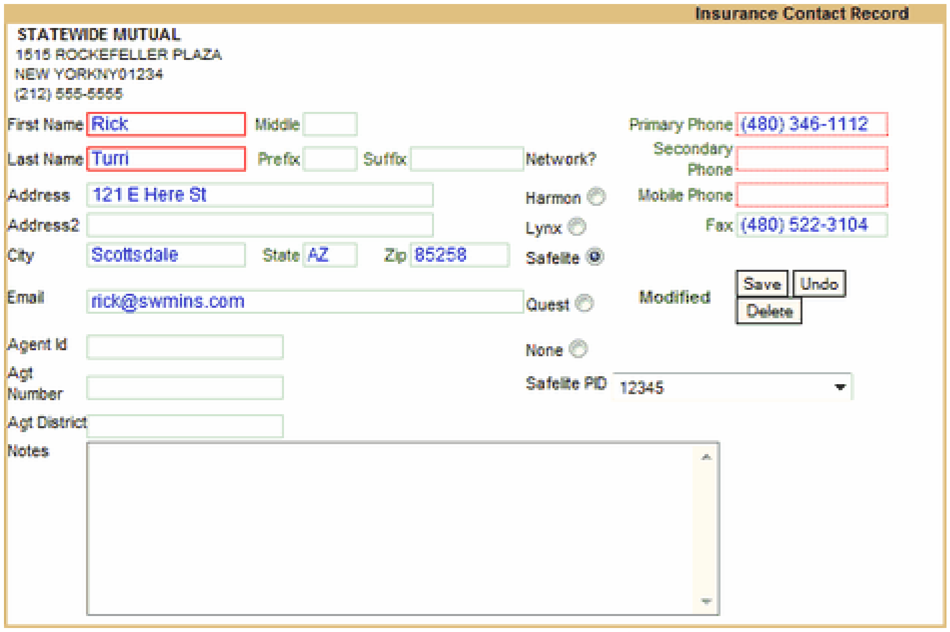
To work with an existing Insurance contact, click on the Insurance Contact button and the Find Existing Insurance Contact window displays in the Work Area.

Enter the search information for the contact you are looking for and click the Find Existing Contact button to list a narrowed search or just click the Find Existing Contact button to list all of the contacts in your database.



Find Existing Insurance Contact Window

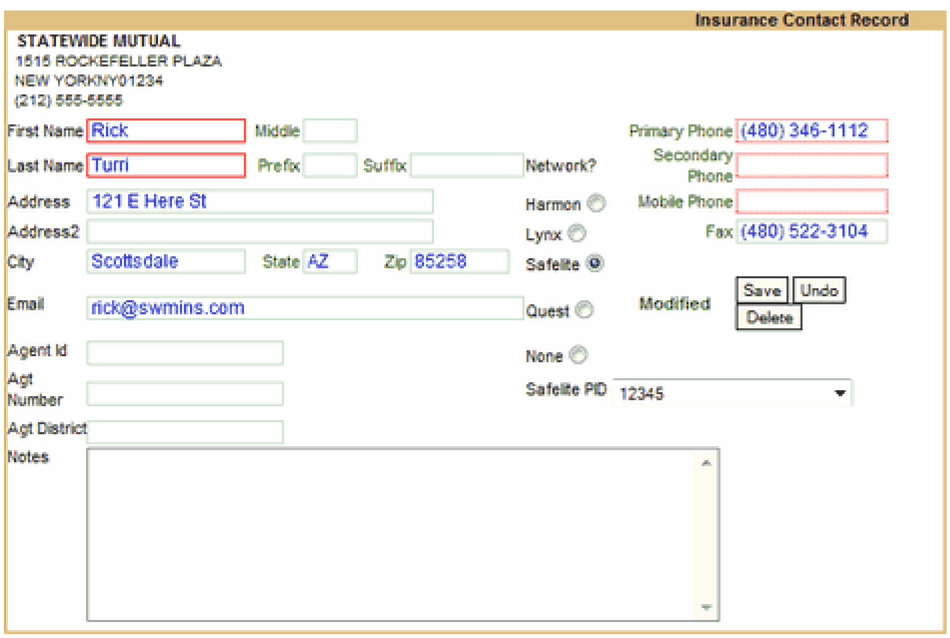
When you locate the contact record you want to work with, you can either double-click it or single-click the line to highlight it and select the Retrieve Contact button to open the contact record.



Insurance Contact Record

5.2.2 Maintaining the Insurance Record

After you have selected the contact record and have retrieved it, the Insurance Contact Record window will open in the Work Area.



Insurance Contact Record

You can edit any of the information in the contact record. In addition, you can also add Notes to the contact record. The Notes will only display in the C&V Record and on the Bill To tab when the insurance company has been selected. This allows you to enter information that would be important to the billing process, but will not print on Quote, Work Orders or Invoices. When you are finished making changes to the contact record, click on the Save button to save the modifications.

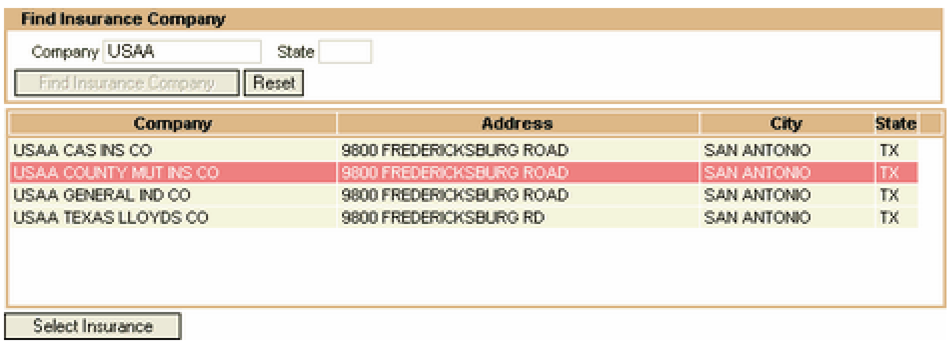
5.2.3 Creating a New Insurance Contact

To create a New Insurance Contact, click on either the Create New Contact button in the Find Existing Insurance Contact window or click on the New Contact button in the Insurance Contact Sub Menu.

Note: ***You can only have one Insurance Contact Record in the eDirectGlass system per insurance company.***

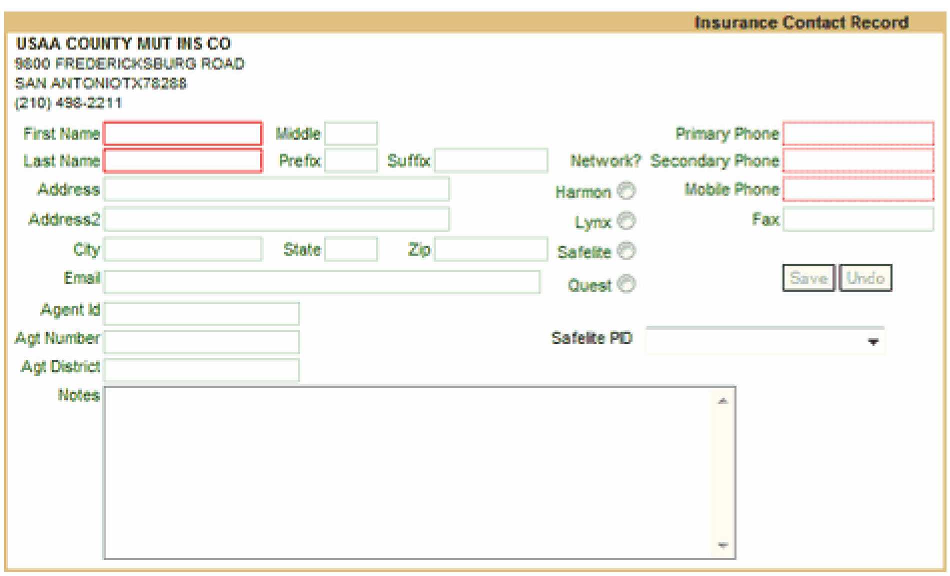
After you click either button, the Find Insurance Company window appears in the Work Area. Enter the Insurance company you wish to add a contact record for and click on the Find Insurance Company button. You must enter at least the first three letters of the Insurance company's name or the state in order to make the Find Insurance Company button active.

Once you have located the Insurance Company in the list, double-click the line or single-click the line and click the Select Insurance button to open the Add Insurance Contact Record screen.



Find Insurance Company Window

A blank New Insurance Contact Record window will display in the Work Area.



New Insurance Contact Record

1. Enter all of the contact information. First and Last names are required, as indicated by the solid

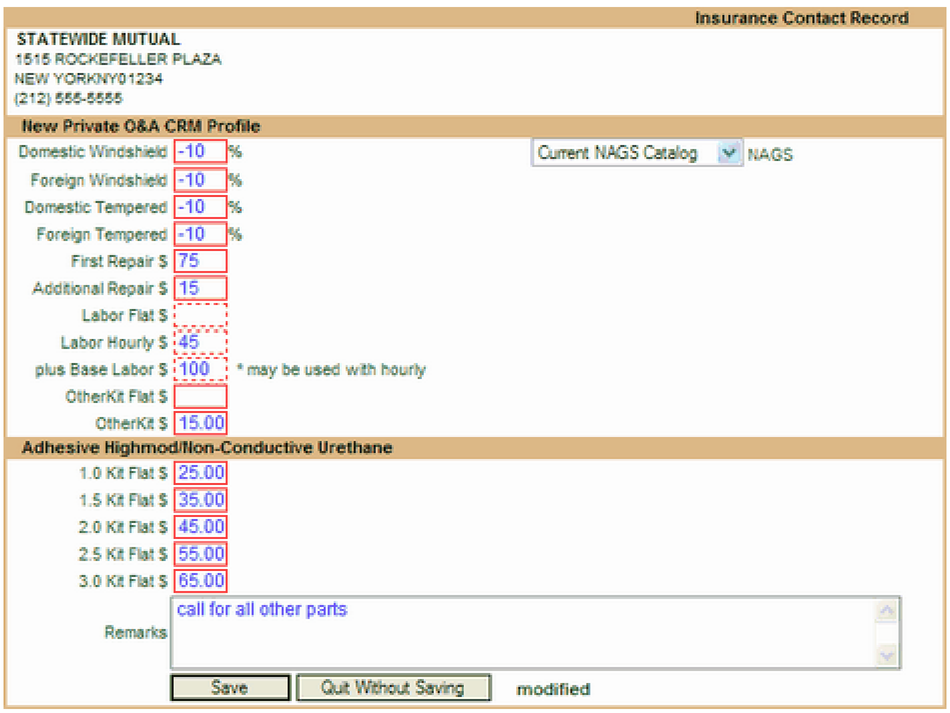
red boxes.

2. Enter at least one telephone number, as indicated by the dotted-line red boxes.
3. If you plan to electronically deliver invoices to this Insurance Company via a third-party administrator, you must select the proper Network from the radio buttons between the address and phone number fields. If this is a Safelite Insurance Company, you may enter the Insurance PID associated with the Safelite Insurance Company in the C&V Relationship Mgmt record and it will pre-populate the correct field on the Bill To tab of the Quote/WO/Invoice. Either select the matching PID from the drop down list or click on the add new PID and enter the correct information listed in the insurance section of your Safelite referral fax.
4. If you have any Notes, enter them in the Notes box.
5. Click on the Save button to save the modifications and new record.

5.2.4 Maintaining O&A Rules

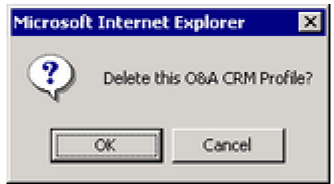
The Insurance Contact Record is where you will set up and maintain your O&A Rules with each of the Insurance companies you do business with.

1. Once you have created the Insurance Contact Record and have it opened, click on either the Add Private O&A button or the Edit Private O&A button that appears in the Sub Menu to display the Private O&A CRM Profile Detail window in the Work Area.



Private O&A CRM Profile Detail Window

2. When you have finished updating the record, click on the Save button to commit to your changes or click on the Quit Without Saving button to keep the rules as they were or if you were creating a new set of rules, to not save them at all.
3. You may also delete an existing set of private O&A Rules by clicking the Delete O&A CRM Profile button. You will be prompted by a dialogue box to confirm that you wish to delete the profile. Click on the OK button to delete.



Delete Profile Dialogue Box

NOTE: You can choose to use the Current NAGS Catalog or select another one from the drop down list depending on the insurance company's O & A Rules. If the insurance company is using a percentage above NAGS, you will need to show that as a negative (-) percentage (i.e, 10% above NAGS will need to be entered as -10). Kit pricing is either a flat fee or by quantity. If the insurance company is using flat enter it in the OtherKit Flat field, otherwise enter the amount in the OtherKit field.

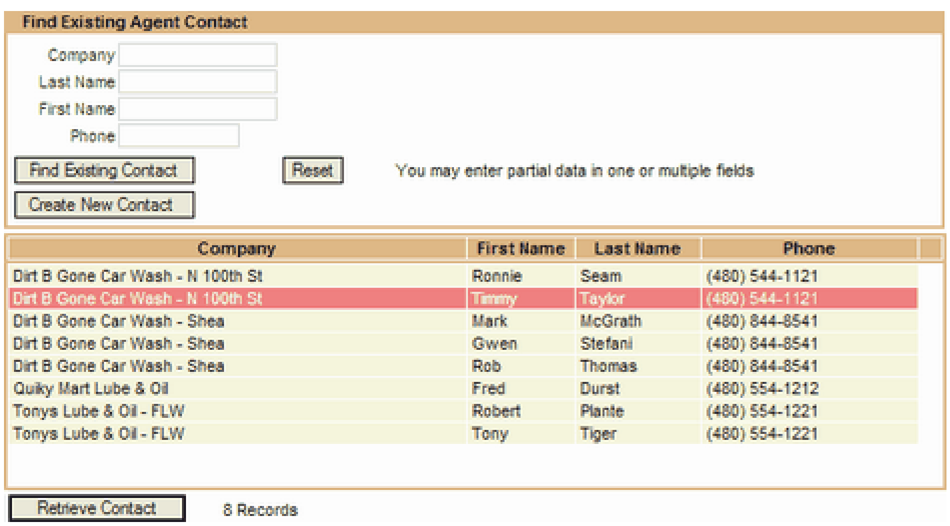
5.3 Agent Contact

The Agent section in C&V Relationship Management allows you to manage and store information about your referral agents. You will enter in one contact record for the referral location (e.g., Car Wash location) and associated records for each of the agents at that location.

5.3.1 Working with Agent Record

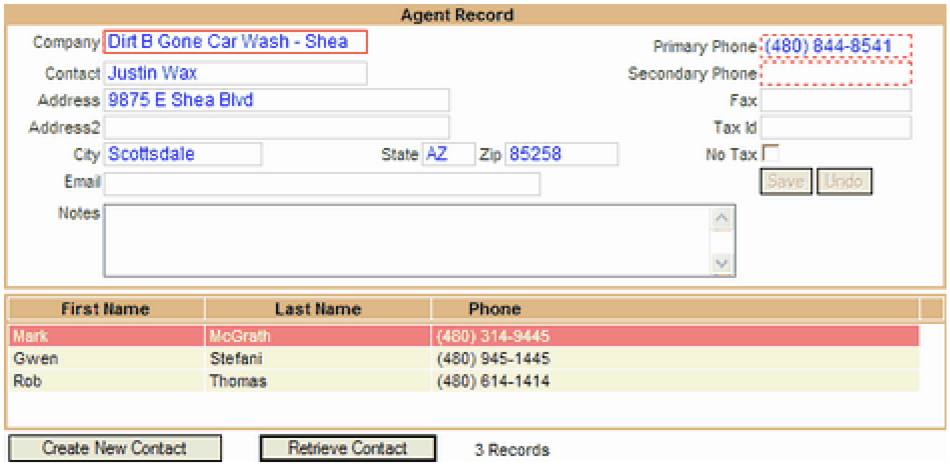
To work with an existing Agent contact, click on the Agent Contact button and the Find Existing Agent Contact window displays in the Work Area.

Enter the search information for the contact you are looking for and click the Find Existing Contact button to list a narrowed search or just click the Find Existing Contact button to list all of the contacts in your database.



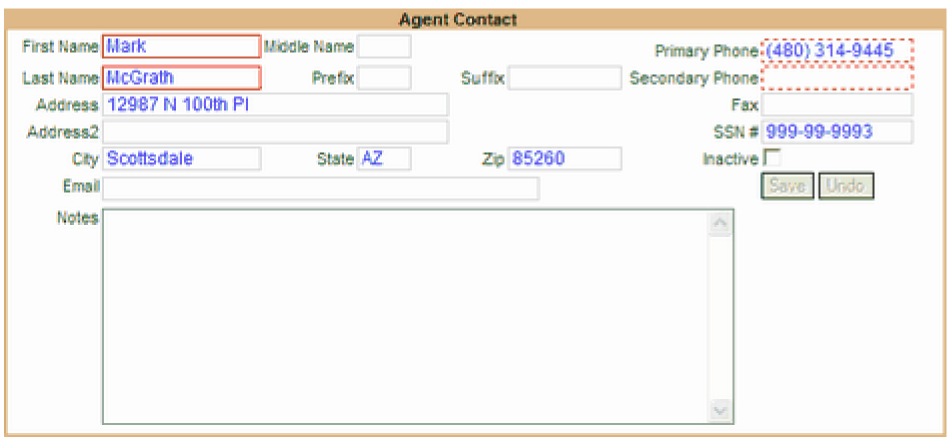
Find Existing Agent Contact Window

When you locate the agent record you want to work with, you can either double-click it or single-click and select the Retrieve Contact button to open the contact record.



Agent Record

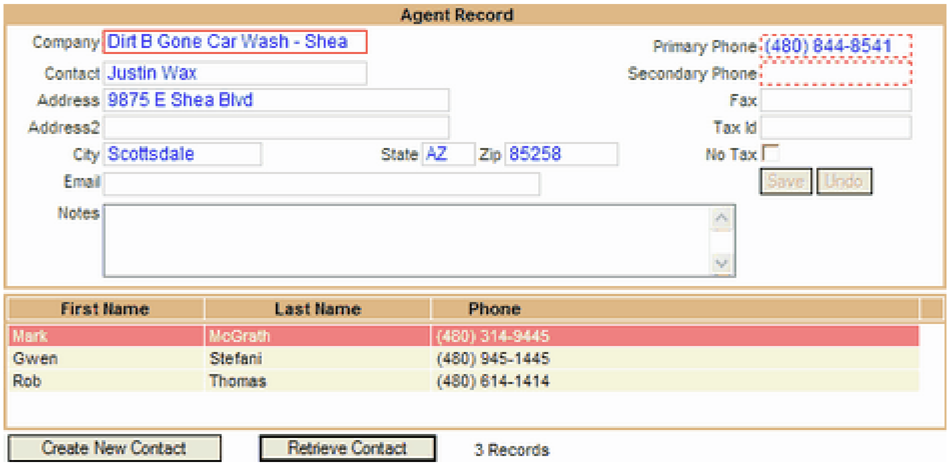
You can also make changes/updates to the individual Agent Contacts from this screen by either double-clicking on the line or single-clicking the contact and clicking on the Retrieve Contact button to open the Agent Contact Record in the Work Area.



Agent Contact Record

5.3.2 Maintaining the Agent Record

After you have selected the contact record and have retrieved it, the Agent Record window will open in the Work Area.

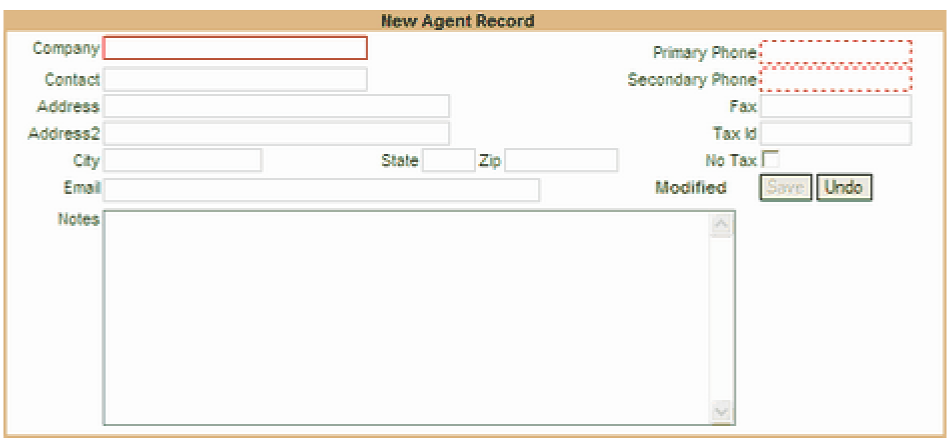


Agent Record

You can edit any of the information in the contact record. In addition, you can also add Notes to the contact record. The Notes will not show up in any location other than in the C&V Relationship Management area. When you are finished making changes to the contact record, click on the Save button to save the modifications.

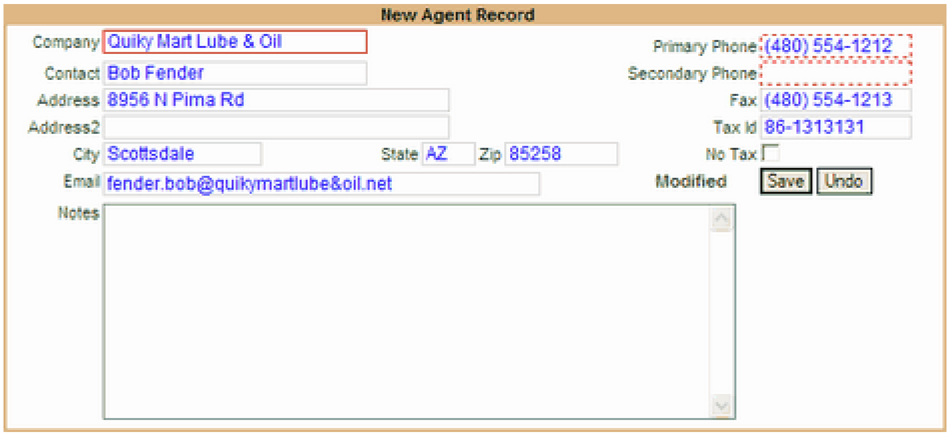
5.3.3 Creating a New Agent Record

To create a New Agent Contact, click on either the Create New Contact button in the Find Existing Agent Contact window or click on the New Agent button in the Agent Contact Sub Menu. A blank New Agent Record window will display in the Work Area.



New Agent Record Window

1. Enter all of the information for the agent location (you will add each of the referral agents at a later time). Company Name is required, as indicated by the solid red box. You may add a main contact under this record, but if this person is a referral agent, you will also need to enter that person as a contact for this record.
2. Enter at least one telephone number, as indicated by the dotted-line red boxes.
3. If you have any Notes, enter them in the Notes box.
4. Click on the Save button to save the modifications and new record.

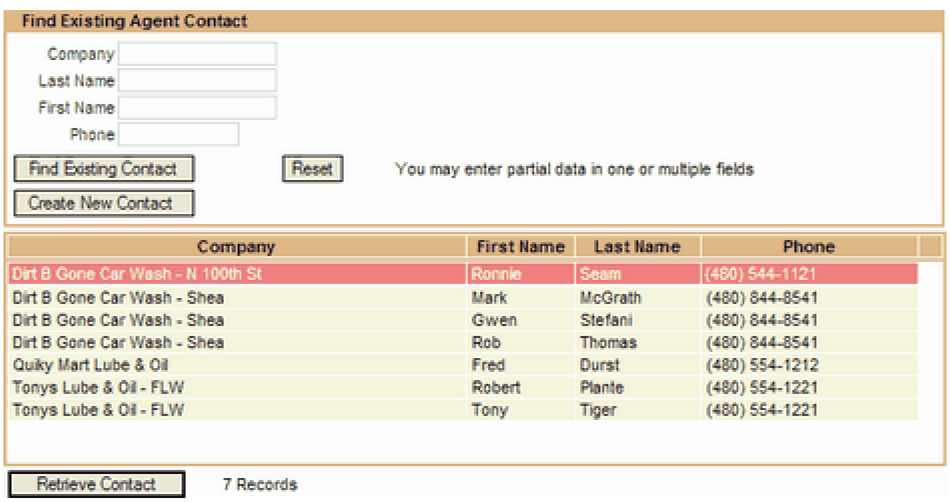


Completed New Agent Record Window

5.3.4 Adding Agent Contacts

Once you have added the main Agent Record, you must now enter in all of your referral agents for tracking purposes (i.e., if you are required to send the referral agents 1099's at year's end).

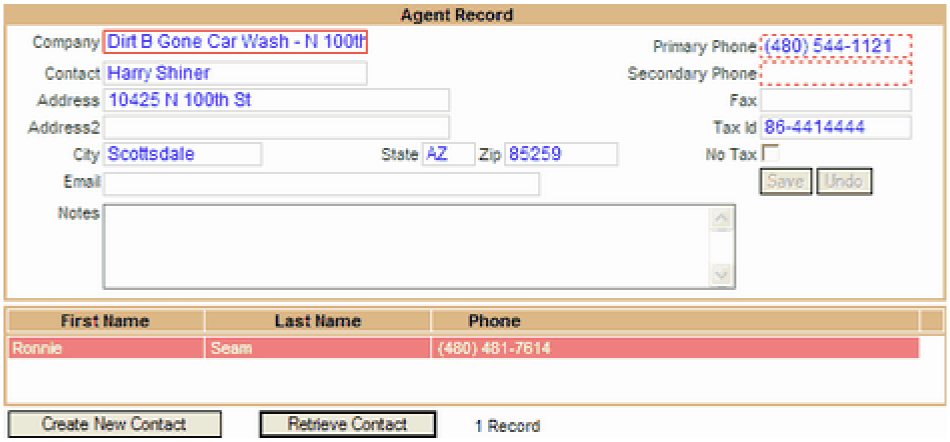
1. Click on the [Agent Contact] button to display the Find Existing Agent Contact window in the Work Area.
2. Click on the [Find Existing Contact] button to display a list of all of your existing Agent Records. **Note:** If you have already entered referral agents for a main contact, they will be listed as separate lines, but they are all part of the main contact record.



Company	First Name	Last Name	Phone
Dirt B Gone Car Wash - N 100th St	Ronnie	Seam	(480) 544-1121
Dirt B Gone Car Wash - Shea	Mark	McGrath	(480) 844-8541
Dirt B Gone Car Wash - Shea	Gwen	Stefani	(480) 844-8541
Dirt B Gone Car Wash - Shea	Rob	Thomas	(480) 844-8541
Quiky Mart Lube & Oil	Fred	Durst	(480) 554-1212
Tonys Lube & Oil - FLW	Robert	Plante	(480) 554-1221
Tonys Lube & Oil - FLW	Tony	Tiger	(480) 554-1221

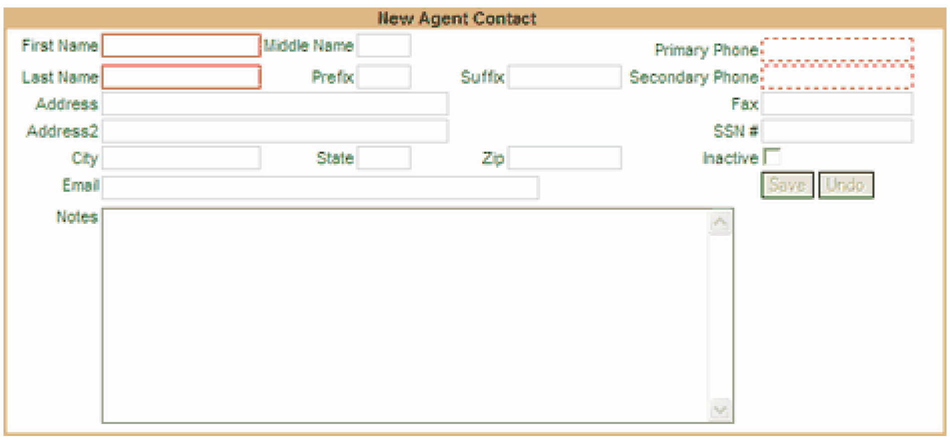
Find Existing Agent Contact Window

3. You may select the record you wish to add an agent to by either double-clicking the line or single-clicking the line and then clicking on the [Retrieve Contact] button to display the existing main Agent Record window in the Work Area.



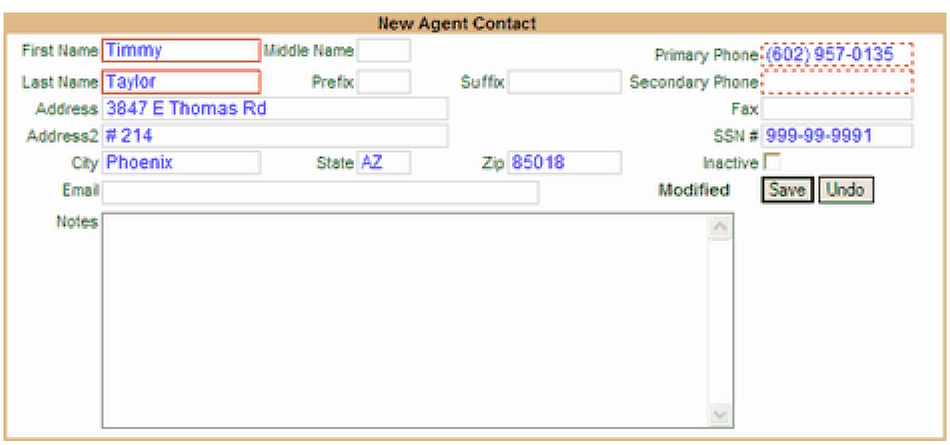
Agent Record Window

4. To add an additional Agent Contact to this record, click on the Create New Contact button to open the New Agent Contact window in the Work Area.



New Agent Contact Window

5. When you have finished entering the necessary information, click on the Save button to add this Agent Contact to the Agent Record.



Completed New Agent Contact Window

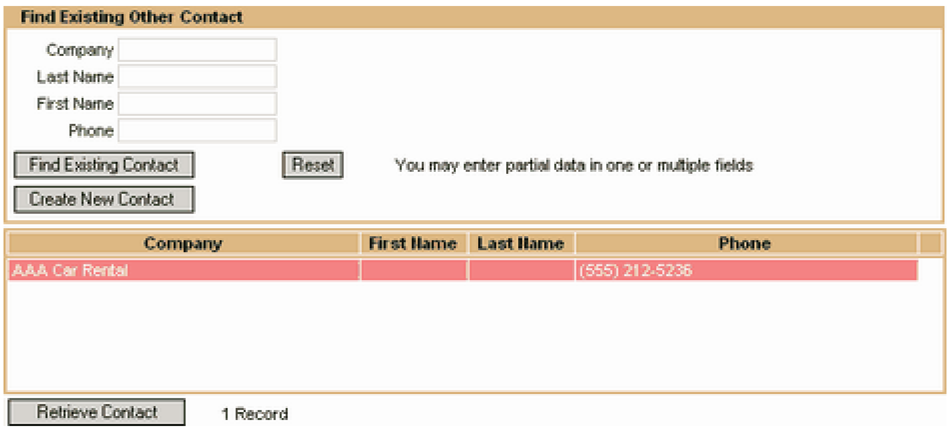
5.4 Other Contact

The Other section in C&V Relationship Management allows you to manage and store information about businesses that offer services such as telephone, supplies, rental car, etc., to your company.

5.4.1 Working with Other Contacts

To work with an existing Other Contact, click on the Other Contact button and the Find Existing Other Contact window will display in the Work Area.

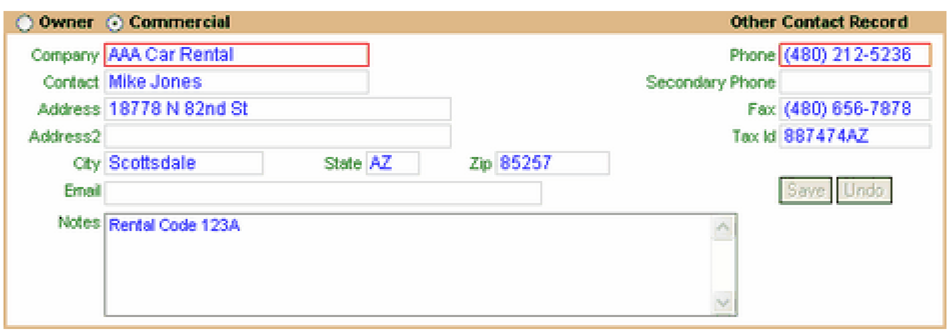
Enter the search information for the contact you are looking for and/or click the Find Existing Contact button to list all of the contacts in your database. When you locate the contact record you want to work with, you can either double-click it or single-click and select the Retrieve Contact button to open the contact record.



Retrieve Other Contact Record

5.4.2 Maintaining the Other Contact Record

After you have selected the contact record and have retrieved it, the Other Contact Record window will open in the Work Area.



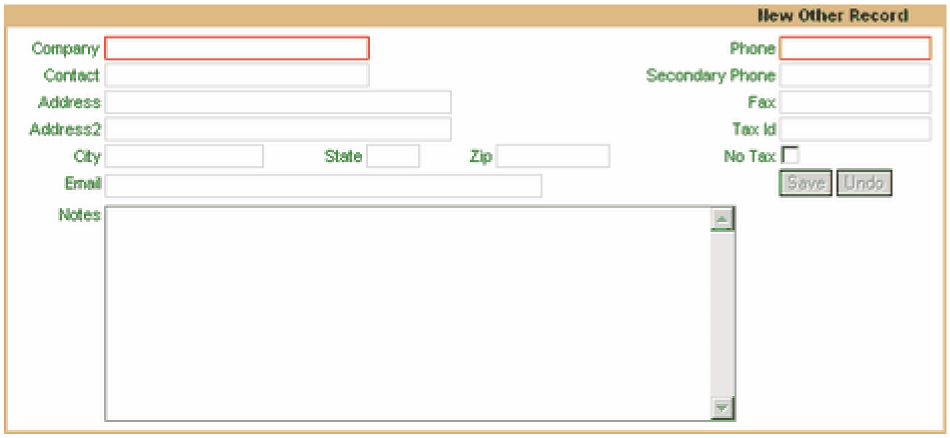
Other Contact Record Window

You can edit any of the information in the contact record. In addition, you can also add Notes to the contact record. The Notes will not show up in any location other than in the C&V Relationship Management area. When you are finished making changes to the contact record, click on the Save button to save the modifications.

5.4.3 Creating a New Other Contact

To create a New Other Contact, click on either the Create New Contact button in the Find Existing Other Contact window or click on the New Contact button in the Other Contact Sub Menu.

After you click either button, a blank New Other Contact Record window will display in the Work Area.



New Other Contact Record

1. Enter all of the contact information. Commercial Records require the Company Name.
2. Enter at least one telephone number, as indicated by the dotted-line red boxes.
3. If you have any Notes, enter them in the Notes box.
4. Click on the Save button to save the modifications and new record.

Part 6

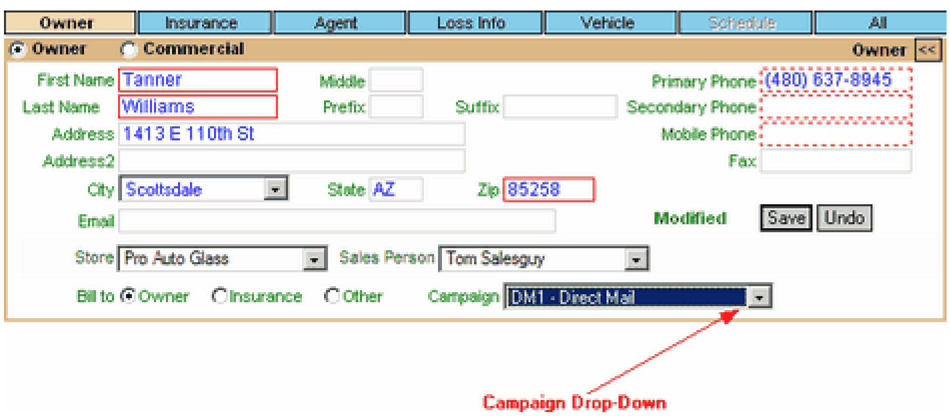
6 Marketing

This chapter provides instructions for working with the eDirectGlass Marketing module. The Market module allows you to create and manage marketing campaigns. Once marketing campaigns are established, you can use them when creating new quotes so that you can track the return for each marketing campaign your company is participating in such as Yellow Pages, Radio, TV, etc.

Clicking on the Marketing button on the Menu Bar displays the following Sub Menu:

Marketing Sub Menu

The Marketing module is very easy to implement and use. After you have created the necessary Marketing Campaigns, you can begin tracking your Marketing efforts. In a Quote, Repair Order or Invoice, all you have to do is click on the Owner button in the Task Menu as you are working in a claim. In the Owner box, click on the drop down box next to Campaign and choose the appropriate Campaign as it relates to the claim. Remember to click on the Save button after you choose a Campaign.



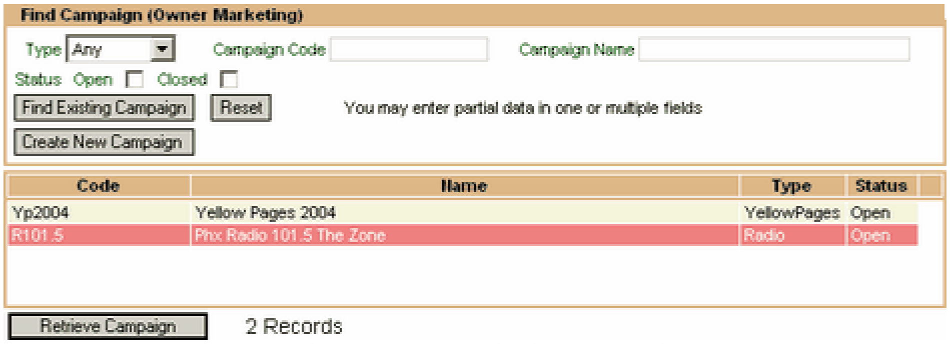
6.1 Owner Marketing

Owner Marketing allows you to create and manage marketing campaigns related to walk-in or referral business.

6.1.1 Working with Owner Marketing

To work with an existing Marketing Campaign, click on the Owner Marketing button and the Find Campaign (Owner Marketing) window displays in the Work Area.

Enter the search information for the Campaign you are looking for and/or click the Find Existing Campaign button to list all of the Marketing Campaigns in your database. When you locate the Campaign you want to work with, you can either double-click it or single-click and select the Retrieve Campaign button to open the Campaign record.



Retrieve Owner Marketing Campaign

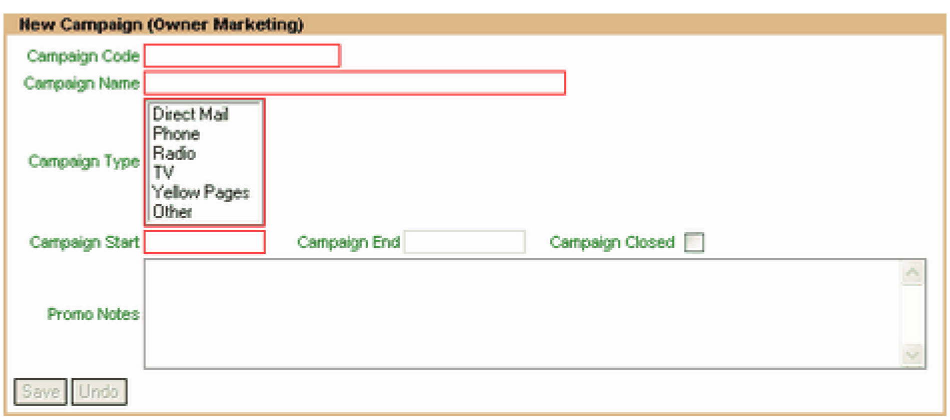
After you retrieve the campaign record, the Edit Campaign (Owner Marketing) window will display in the Work Area. Make any modifications to the Campaign and when you are finished, click on the Save button.

Edit Campaign (Owner Marketing) Window

6.1.2 Creating a New Campaign

To create a New Owner Campaign, click on either the Create New Campaign button in the Find Campaign (Owner Marketing) window or click on the New Campaign button in the Owner Marketing Sub Menu.

After you click either button, a blank New Campaign (Owner Marketing) window will display in the Work Area.



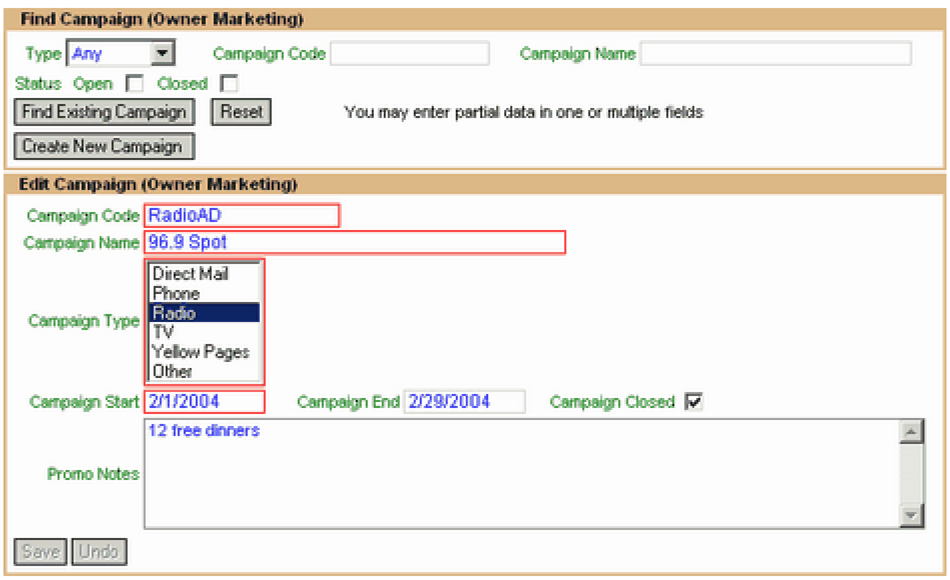
New Campaign (Owner Marketing) Window

1. Enter a Campaign Code. This code will be used for identifying campaigns for reporting purposes.
2. Enter a Campaign Name that will be associated to the Campaign Code. This name should be short yet descriptive.
3. Select a Campaign Type. If you select 'Other' please fill in a description in the box that will appear.
4. Select a Campaign Start and End date.
5. Enter Promo Notes. Use this area to note, in as much detail as you wish, the description of the Marketing Campaign.
6. Click on the Save button to save the New Campaign.

6.1.3 Close an Owner Campaign

When your Campaign time period is over or at anytime during a Campaign, you can close the Campaign so it is no longer displayed in the Quotes & Invoicing module.

To close a Campaign, find the Campaign you wish to close by clicking on the Find Existing Campaign button in the Find Campaign (Owner Marketing) window. In the Edit Campaign (Owner Marketing) window, click on the Campaign Closed ☑ check box and click on the Save button to close the Campaign.



Edit Campaign (Owner Marketing) Window - Closed Campaign

You may also close a campaign by highlighting the campaign line in the Find Campaign (Owner Marketing) listing and clicking on the Close Campaign button in the Sub Menu.

NOTE: Once a Campaign is closed, it cannot be reopened.

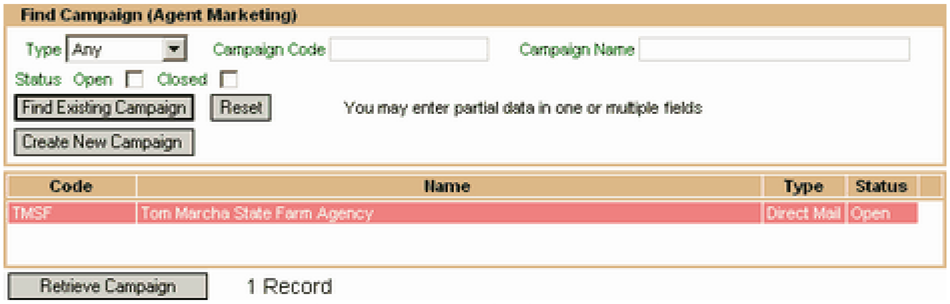
6.2 Agent Marketing

Agent Marketing allows you to create and manage marketing campaigns related to working with Agency's or Third-Party Administrators.

6.2.1 Working with Agent Marketing

To work with an existing Agent Marketing Campaign, click on the Agent Marketing button and the Find Campaign (Agent Marketing) window will display in the Work Area.

Enter the search information for the Campaign you are looking for and/or click the Find Existing Campaign button to list all of the Agent Campaigns in your database. When you locate the Campaign you want to work with, you can either double-click it or single-click and select the Retrieve Campaign button to open the Campaign record.



Retrieve Agent Marketing Campaign

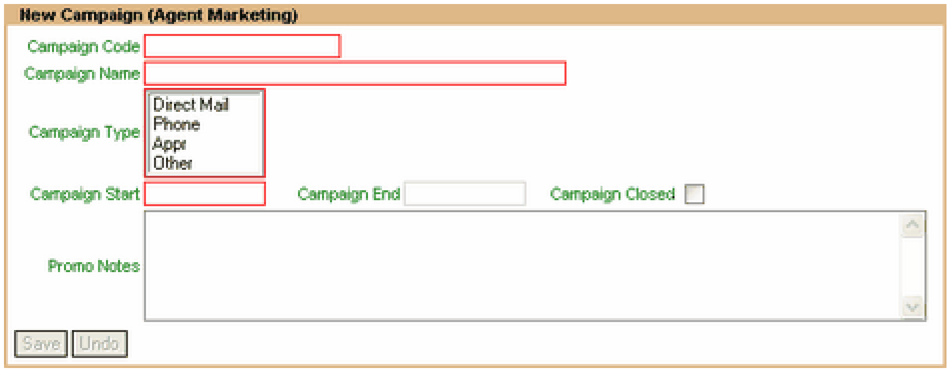
After you retrieve the campaign record, the Edit Campaign (Agent Marketing) window will display in the Work Area. Make any modifications to the Campaign and when you are finished, click on the Save button.

Edit Campaign (Agent Marketing) Window

6.2.2 Creating an Agent Campaign

To create a New Agent Campaign, click on either the Create New Campaign button in the Find Campaign Lookup Screen or click on the New Campaign button in the Agent Marketing Sub Menu.

After you click either button, a blank New Campaign (Agent Marketing) window will display in the Work Area.



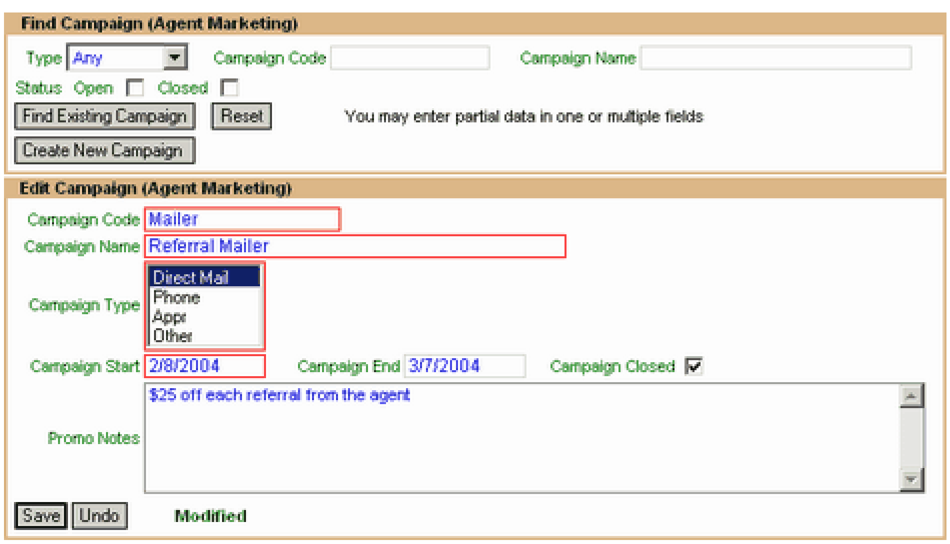
New Campaign (Agent Marketing) Window

1. Enter a Campaign Code. This code will be used for identifying campaigns for reporting purposes.
2. Enter a Campaign Name that will be associated to the Campaign Code. This name should be short yet descriptive.
3. Select a Campaign Type. If you select 'Other' please fill in a description in the box that will appear.
4. Select a Campaign Start and End date.
5. Enter Promo Notes. Use this area to note, in as much detail as you wish, the description of the Marketing Campaign.
6. Click on the Save button to save the New Campaign.

6.2.3 Close an Agent Campaign

When your Campaign time period is over or at anytime during a Campaign, you can close the Campaign so it is no longer displayed in the Quotes & Invoicing module.

To close a Campaign, find the Campaign you wish to close by clicking on the Find Existing Campaign button in the Find Campaign (Agent Marketing) window. In the Edit Campaign (Agent Marketing) window, click on the Campaign Closed ☑ check box and click on the Save button to close the Campaign.



Edit Campaign (Agent Marketing) Window - Closed Campaign

You may also close a campaign by highlighting the campaign line in the Find Campaign (Agent Marketing) listing and clicking on the Close Campaign button in the Sub Menu.

NOTE: Once a Campaign is closed, it cannot be reopened.

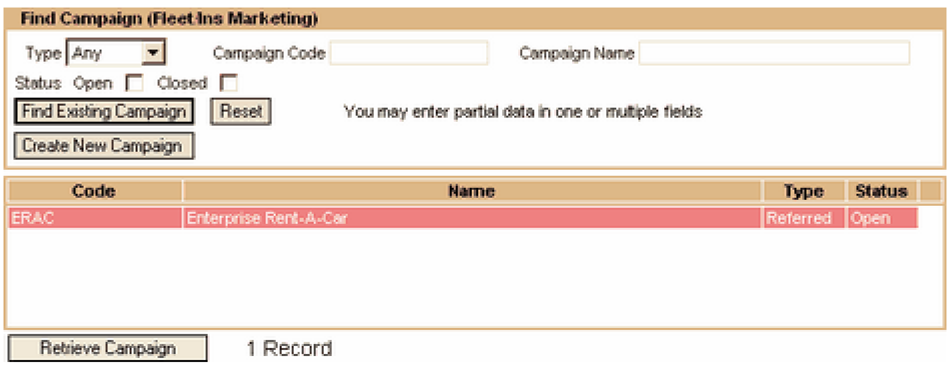
6.3 Fleet/Ins Marketing

Fleet/Ins Marketing allows you to create and manage marketing campaigns related to working with Fleet or Insurance companies.

6.3.1 Working with Fleet/Ins Marketing

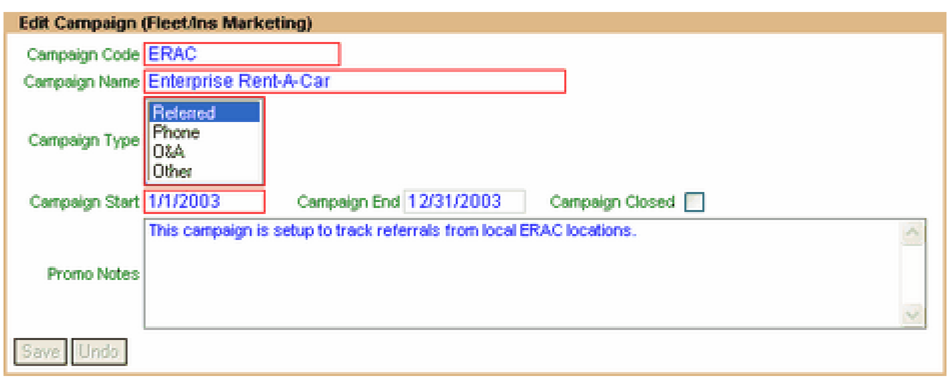
To work with an existing Marketing Campaign, click on the Fleet/Ins Marketing button and the Find Campaign (Fleet/Ins Marketing) window displays in the Work Area.

Enter the search information for the Campaign you are looking for and/or click the Find Existing Campaign button to list all of the Fleet/Insurance Campaigns in your database. When you locate the Campaign you want to work with, you can either double-click it or single-click and select the Retrieve Campaign button to open the Campaign record.



Retrieve Fleet/Ins Marketing Campaign

After you retrieve the campaign record, the Edit Campaign (Fleet/Ins Marketing) window will display in the Work Area. Make any modifications to the Campaign and when you are finished, click on the Save button.

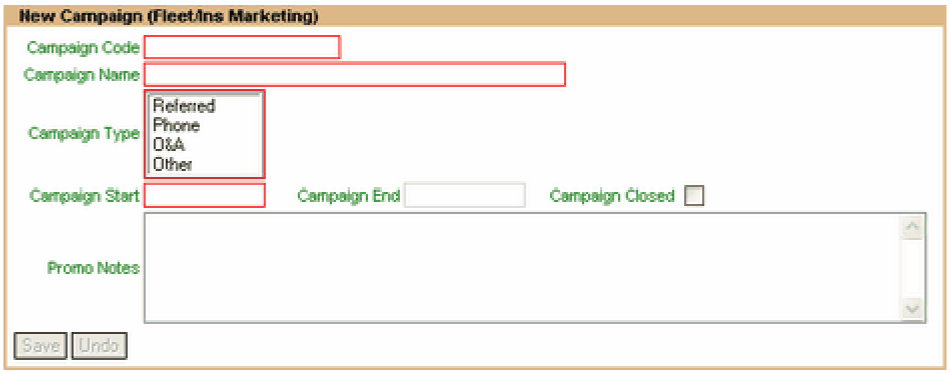


Edit Campaign (Fleet/Ins Marketing) Window

6.3.2 Creating a Fleet/Ins Campaign

To create a New Fleet/Ins Campaign, click on either the Create New Campaign button in the Find Campaign (Fleet/Ins Marketing) window or click on the New Campaign button in the Fleet/Ins Marketing Sub Menu.

After you click either button, a blank New Campaign (Fleet/Ins Marketing) window will display in the Work Area.



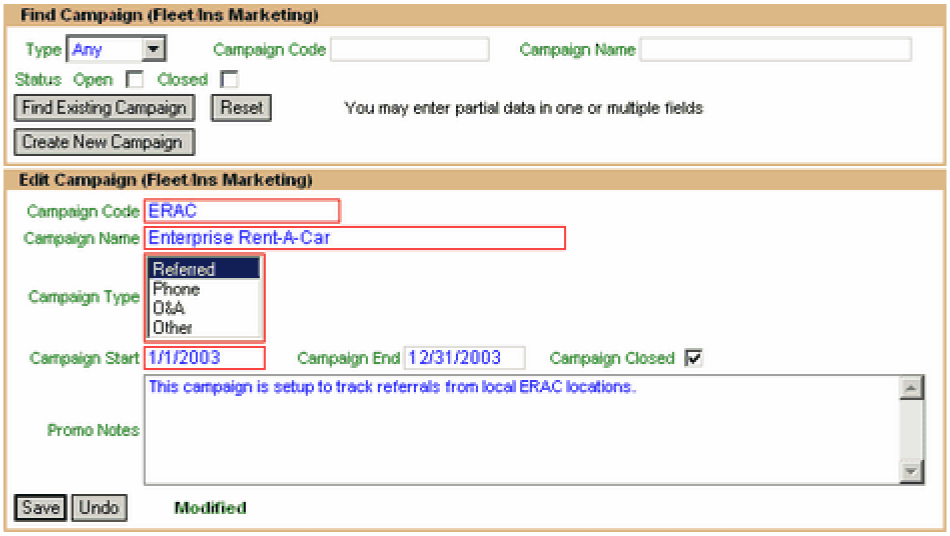
New Campaign (Fleet/Ins Marketing) Window

1. Enter a Campaign Code. This code will be used for identifying campaigns for reporting purposes.
2. Enter a Campaign Name that will be associated to the Campaign Code. This name should be short yet descriptive.
3. Select a Campaign Type. If you select 'Other' please fill in a description in the box that will appear.
4. Select a Campaign Start and End date.
5. Enter Promo Notes. Use this area to note, in as much detail as you wish, the description of the Marketing Campaign.
6. Click on the Save button to save the New Campaign.

6.3.3 Close a Fleet/Ins Marketing Campaign

When your Campaign time period is over or at anytime during a Campaign, you can close the Campaign so it is no longer displayed in the Quotes & Invoicing module.

To close a Campaign, find the Campaign you wish to close by clicking on the Find Existing Campaign button in the Find Campaign (Fleet/Ins Marketing) window. In the Edit Campaign (Fleet/Ins Marketing) window, click on the Campaign Closed ☑ check box and click on the Save button to close the Campaign.



Edit Campaign (Fleet/Ins Marketing) Window - Closed Campaign

You may also close a campaign by highlighting the campaign line in the Find Campaign (Fleet/Ins Marketing) listing and clicking on the Close Campaign button in the Sub Menu.

NOTE: Once a Campaign is closed, it cannot be reopened.

6.4 Marketing Reports

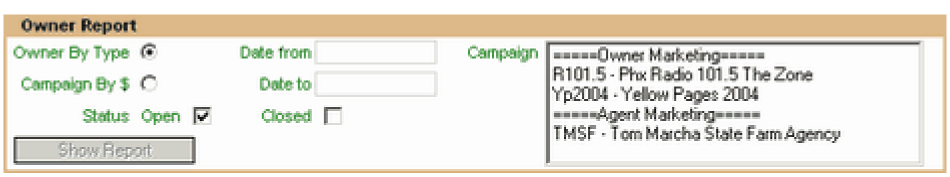
If you want to see how a campaign is performing, click on the Marketing Reports button and the Reports Sub Menu will be displayed.

Marketing Reports Sub Menu

Choose a report type from the Sub Menu.

Campaign Reports

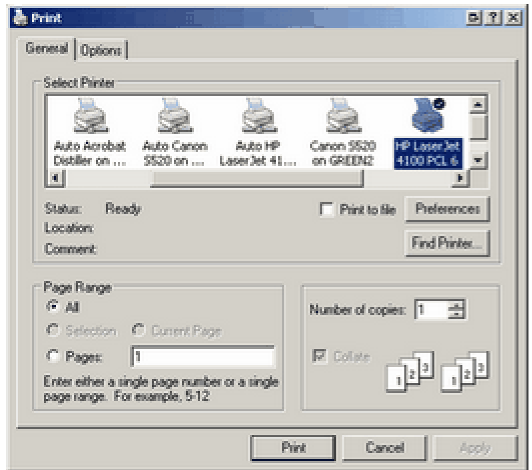
When you click on the Campaign Reports button, the Owner Report window will appear in the Work Area.



Owner Report Window

1. Select a Report: Owner By Type ⦿ or Campaign By $ ○.
2. Select a date range.
3. Select a Status. You can choose both open and closed if necessary.
4. Choose a Campaign. You can only choose one Campaign at a time.
5. Review the information selected to make sure it is what you want for your report. Click on the Show Report button to build the report.

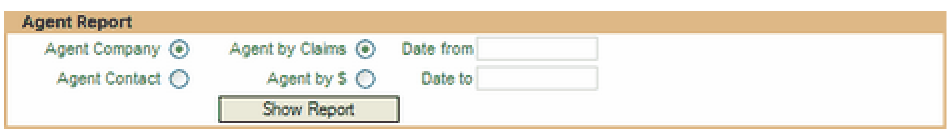
6. You can also print the report by clicking on the Print Report button which will open the report in another browser window. Click on the Print Report button in this browser window. The print dialogue box will appear. Click on the Print button to send the report to the printer you have selected. When you have finished, click on the Close Window button.



Print Dialogue Box

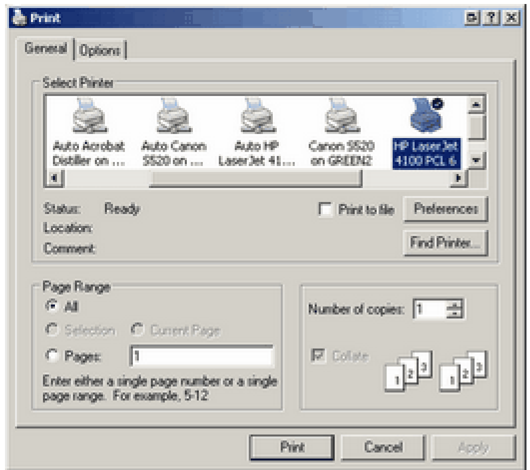
Agent Reports

When you click on the Agent Reports button, the Agent Report window will appear in the Work Area. This report is based on information entered in C & V Relationship Management - Agent Contact and as applied on the Agent Tab of each record.



Agent Report Window

1. Select a Report: Agent Company or Agent Contact.
2. Select the report type: Agent by Claims or Agent by $.
3. Select a Date Range.
4. Review the information selected to make sure it is what you want for your report. Click on the Show Report button to build the report.
5. You can also print the report by clicking on the Print Report button which will open the report in another browser window. Click on the Print Report button in this browser window. The print dialogue box will appear. Click on the Print button to send the report to the printer you have selected. When you have finished, click on the Close Window button.



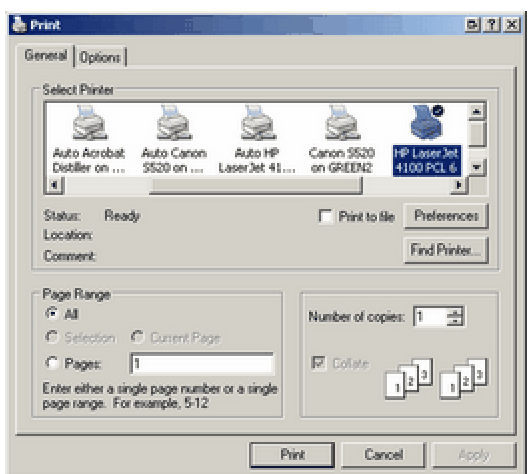
Print Dialogue Box

Fleet/Insurance Reports

When you click on the Insurance Reports button, the Insurance Report window will appear in the Work Area.

Insurance Report Window

1. Select a Report: Insurance by Claims or Insurance by $.
2. Select a Date Range.
3. Review the information selected to make sure it is what you want for your report. Click on the Show Report button to build the report.
4. You can also print the report by clicking on the Print Report button which will open the report in another browser window. Click on the Print Report button in this browser window. The print dialogue box will appear. Click on the Print button to send the report to the printer you have selected. When you have finished, click on the Close Window button.

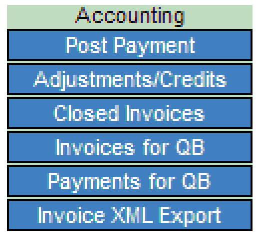


Print Dialogue Box

Part 7

7 Accounting

eDirectGlass has a complete Accounts Receivable module that allows you to manage the billing process. When you click on the Accounting button on the Menu Bar, the Accounting Sub Menu is displayed.



Accounting Sub Menu

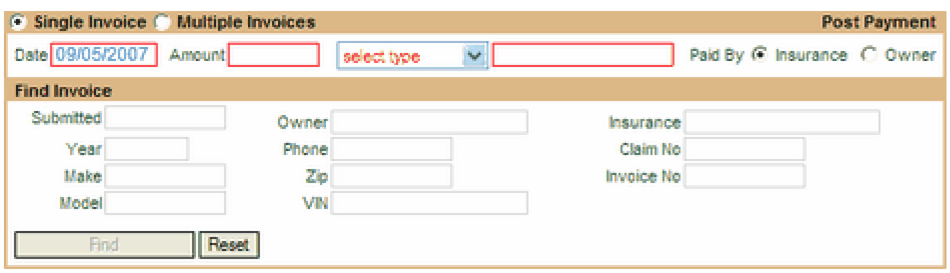
7.1 Accounting Overview

When you submit Invoices in eDirectGlass, you can manage the receivables process using the Accounting module. In this module, you can post payments, adjust invoices and manage collections using accounting reports.

eDirectGlass does not contain any other accounting module such as Accounts Payable, Payroll, etc. We recommend many different accounting packages for complete accounting such as QuickBooks, Peachtree or MYOB.

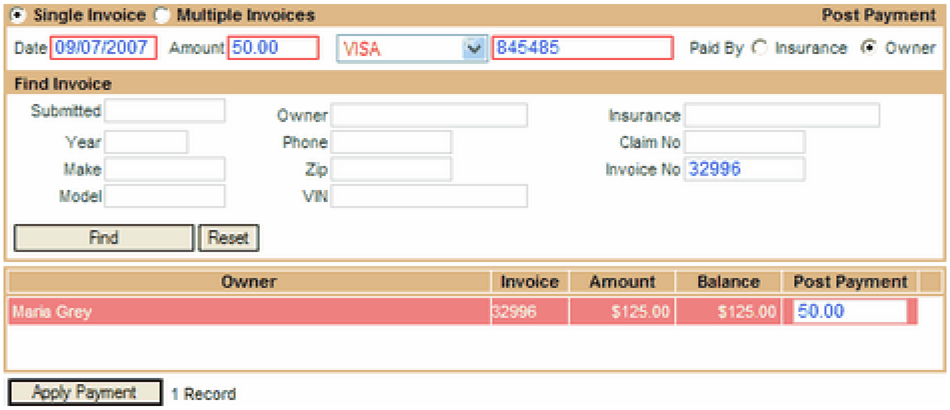
7.2 Post Payment

You can post a payment to any Invoice that has been submitted. To post a payment to an Invoice, click on the Post Payment button and the Post Payment window is displayed in the Work Area.



Post Payment Window

1. Select whether you are going to post a payment for a Single Invoice or for Multiple Invoices. There are times when a TPA/Network or Insurance company may send you a combined payment for multiple invoices; therefore, you would select Multiple Invoices.
2. Enter the Amount to post against the Invoice(s).
3. Select the Payment Type from the drop-down list and then enter the referral number of the payment (check number or credit card approval code).
4. Select whether the payment is from Insurance or the Owner.
5. In the Find Invoice window, enter the Invoice Number or one of the other fields and click on the Find button. You can also just click on the Find button with no search criteria to list all of your outstanding Invoices.
6. The Invoice Lookup screen will display in the Work Area.
7. Select the Invoice and the Payment Amount will be added to the Post Payment Field.
8. Click on the Apply Payment button to post the payment.

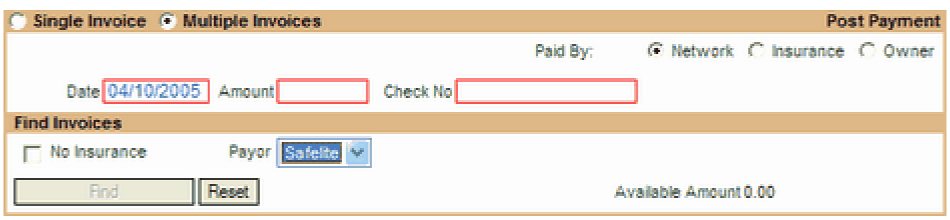


Apply Payment Window

9. After the payment has been posted, the Apply Payment window will update and reflect the new balance.

Updated Apply Payment Window

If you choose the Multiple Invoice button at the top of the screen, you will need to choose the Paid By from either Network, Insurance or Owner. The Payor list will be based on this selection (e.g, Paid By Network will give you a listing of Safelite or LYNX).

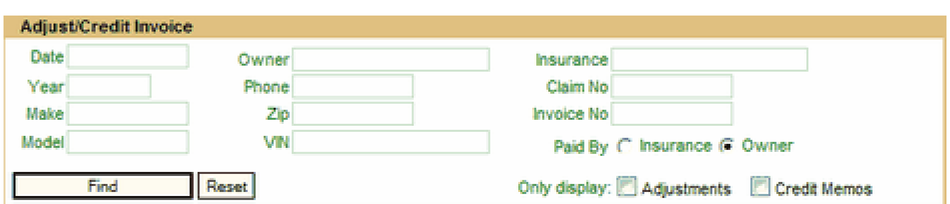


Multiple Invoice Screen

7.3 Adjustments/Credits

Situations will arise from time to time that will require you to adjust an Invoice. For example, you may need to waive a deductible or agree to discount an Invoice to meet program requirements after an Invoice has been submitted. It is important to track these adjustments for accounting and management reasons.

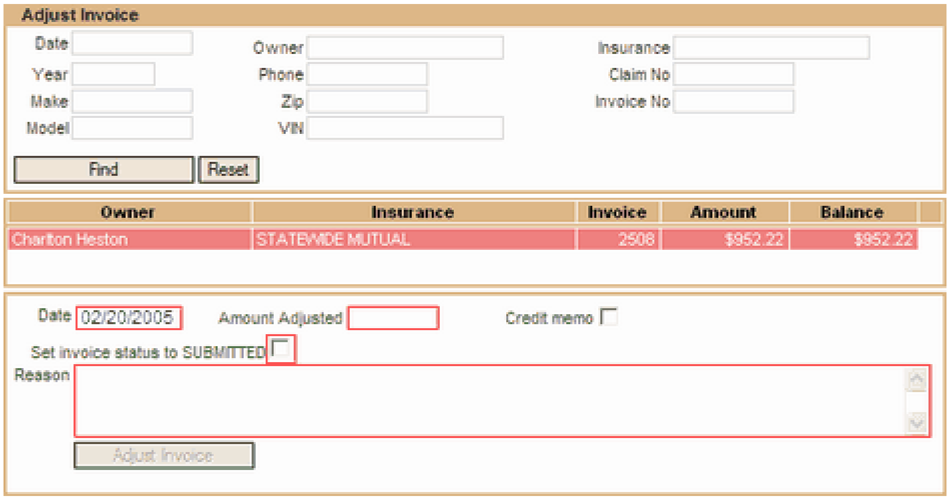
To adjust an Invoice, click on the Adjustments/Credits button and the Adjust/Credit Invoice window will display in the Work Area.



Adjust/Credit Invoice Window

1. Enter an Owner, Insurance Company or Invoice Number and click on the Find

button.
2. In the Find list, click on the Invoice you want to Adjust.
3. The Adjustment window will display in the Work Area.
4. Enter the Amount to Adjust and a Reason for the adjustment and click on the Adjust Invoice button.



Adjustment Window

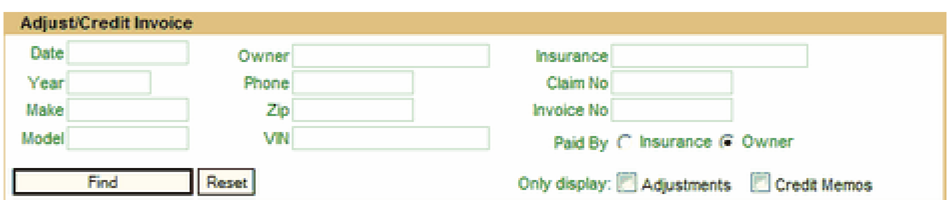
5. The Adjust Invoice window will refresh and display the Invoice with the adjustment applied.

Owner	Insurance	Invoice	Amount	Balance
Charlton Heston	STATEWIDE MUTUAL	2508	$952.22	$852.22

7.3.1 Credit Memo

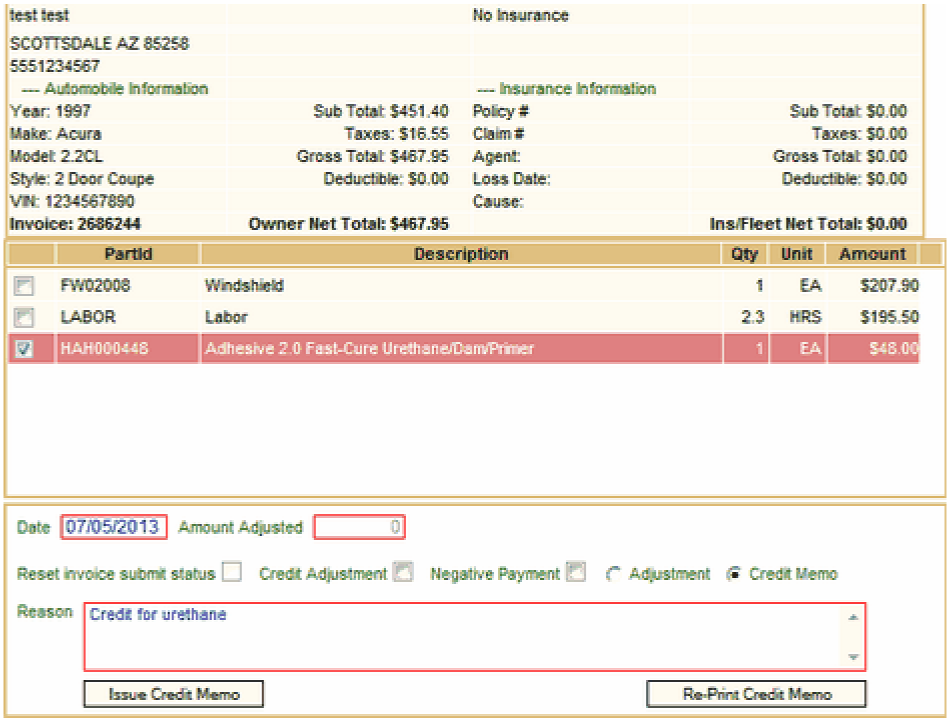
The eDirectGlass allows you to create a Credit Memo in the system. This Credit Memo functionality, leaves the original invoice intact (for date ranged accounting issues), moves any payments and/or previous adjustments made on the original invoice to the newly created invoice and creates a new invoice with the current date with all of the original invoice information so that you can adjust pricing and resubmit the new invoice instead.

To create a Credit Memo, click on the Adjustments/Credits button and the Adjust Invoice window will display in the Work Area.



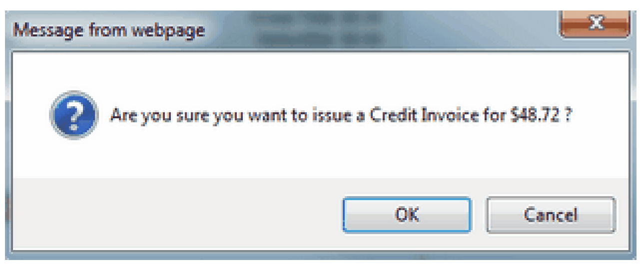
Adjust Invoice Window

1. Enter an Owner, Insurance Company or Invoice Number and click on the Find button.
2. In the Find list, click on the Invoice you want to Credit.
3. The Adjustment window will display in the Work Area. Select the Credit Memo radio button (this active for Invoices only) and the parts list from that particular invoice will display on the screen.
4. Check all parts for a full credit or just individual parts for a partial credit, enter notes in the Reason box and click on the Issue Credit Memo button to apply the credit memo to that invoice.



Credit Memo Window

5. Once you have clicked on the Issue Credit Memo button, you will get a dialogue box verifying that you wish to issue this credit memo. Once you click on the OK button, you will be taken to the new invoice to make your pricing adjustments and resubmit the invoice.



Credit Memo Dialogue Box

7.3.2 Reset Invoice Status

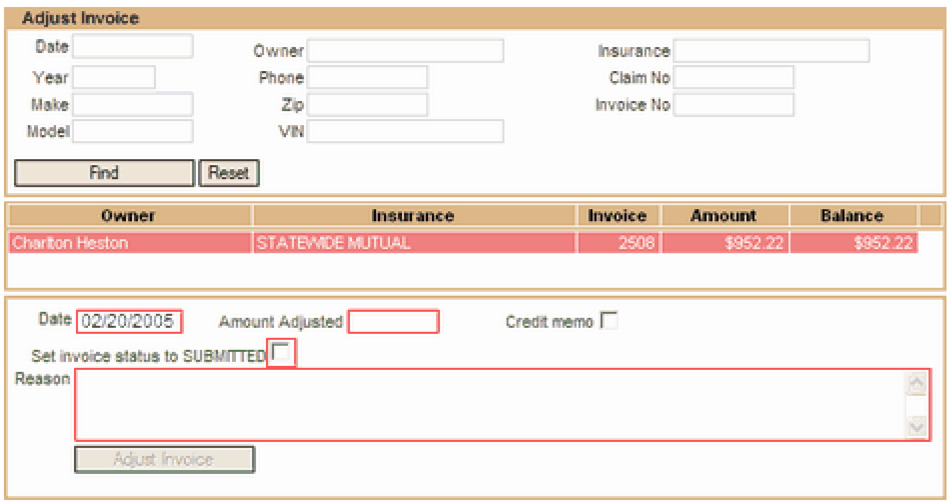
There may be times after you have submitted an invoice to an Insurance Company where you may need to make changes that do not effect the pricing that was submitted to the Insurance Company (i.e., you need to update a VIN Number or change an address). In order to make any changes to an already submitted invoice, you must first change the submission status and then you can make changes to the invoice. **NOTE: If you have already submitted the record electronically to the Network, you must first receive a manual rejection of the invoice from them before you can 'unlock' and resubmit the invoice electronically. Failure to do so may result in a duplicate invoice rejection from the Network and charges from eDirectGlass and/or the Network may be incurred.**

To reset the submission status on an invoice, click on the Adjustments/Credits button and the Adjust

Invoice window will display in the Work Area.

Adjust Invoice Window

1. Enter an Owner, Insurance Company or Invoice Number and click on the Find button.
2. In the Find list, click on the Invoice you want to Adjust.
3. The Adjustment window will display in the Work Area.
4. Enter a 0 (zero) in the Amount to Adjust box, click on the Set invoice status to SUBMITTED, enter a Reason for the status change in the Reason box and click on the Adjust Invoice button.

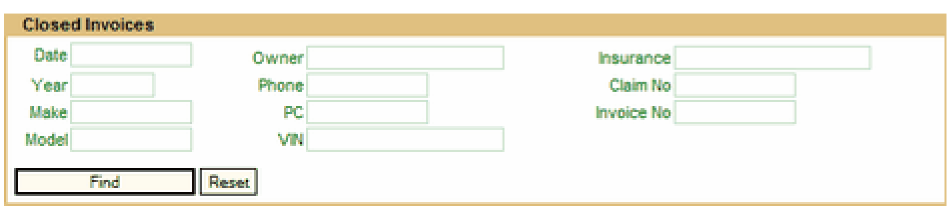


Adjustment Window

5. You will now be able to make and save changes to the invoice.

7.4 Closed Invoices

Clicking on the Closed Invoices button will bring up the Closed Invoices Find Panel. This will display invoices that have been paid to $0 in the eDirectGlass system for historical information.



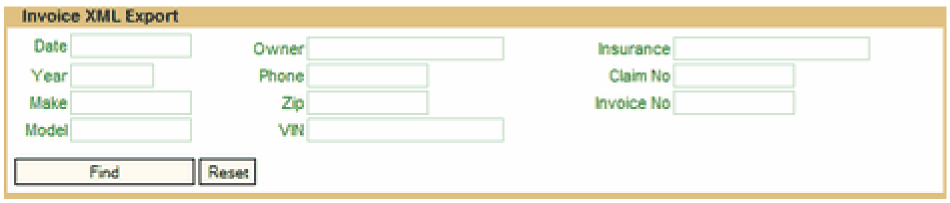
Closed/Historic Invoice may also be found by entering search criteria on the Find Invoice Panel under Quotes & Invoicing, Invoicing. Once the search criteria has been entered, simply click on the Find Closed/Historic Invoice button to display the record(s).

7.5 Invoices & Payments for QB

The eDirectGlass system allows you to communicate with our existing QuickBooks company file. They system allows you to send invoices with line item detail and payment information to your company file. The QuickBooks Setup requires an eDirectGlass technician to enable and setup this feature. Please contact your eDirectGlass sales associate for pricing and to schedule your setup appointment.

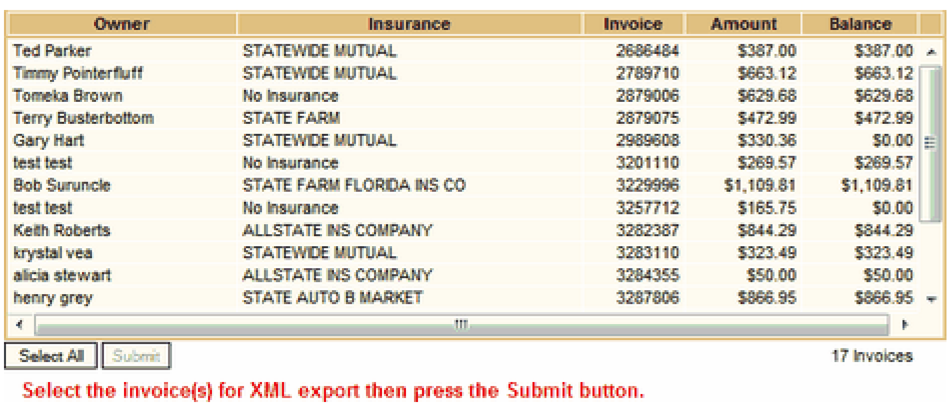
7.6 Invoice XML Export

The Invoice XML Export allows you to export data in a XML format in order to be able to import it into another program using that program's import feature.



Invoice XML Export Window

1. Enter the criteria you want for the export and click on the Find button.
2. The Invoice XML Export Selection list will display in the panel. Select the invoices you wish to export or click on the Select All button and then click on Submit to create the file.



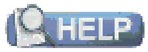
Owner	Insurance	Invoice	Amount	Balance
Ted Parker	STATEWIDE MUTUAL	2686484	$387.00	$387.00
Timmy Pointerfluff	STATEWIDE MUTUAL	2789710	$663.12	$663.12
Tomeka Brown	No Insurance	2879006	$629.68	$629.68
Terry Busterbottom	STATE FARM	2879075	$472.99	$472.99
Gary Hart	STATEWIDE MUTUAL	2989608	$330.36	$0.00
test test	No Insurance	3201110	$269.57	$269.57
Bob Suruncle	STATE FARM FLORIDA INS CO	3229996	$1,109.81	$1,109.81
test test	No Insurance	3257712	$165.75	$0.00
Keith Roberts	ALLSTATE INS COMPANY	3282387	$844.29	$844.29
krystal vea	STATEWIDE MUTUAL	3283110	$323.49	$323.49
alicia stewart	ALLSTATE INS COMPANY	3284355	$50.00	$50.00
henry grey	STATE AUTO B MARKET	3287806	$866.95	$866.95

Invoice XML Export Selection List

Part 8

8 Help & Reporting Issues

On-Line Help Manual

On any screen you can find the  button located below the Sub Menu on the left hand side of the screen. Clicking on this button will take you to our on-line help manual to the section relating to the module you are in when you requested help.

Live Help

If you require further assistance, you can click on the  button also located below the Sub Menu to discuss your issue with a technical support representative during normal business hours.

You may also send an e-mail to technical support via the  button after normal business hours.

Reporting Bugs

You can also report any issues with the program by clicking on the  button located underneath your user name in the upper right hand corner of the screen. Clicking on this button will bring up the Report Issue window which will require you to enter information concerning your problem and the computer you were using when you experienced the issue.

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Total Shop Management User Manual

Thank you for using eDirectGlass!