Quick Start User Guide

Version 2.9n

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eDirectGlass© Total Shop Management Quick Start Guide

Welcome to the eDirectGlass Total Shop Management© (TSM) USA Edition. As a valued subscriber, we want to make sure you get the most from our system and this quick start guide will get you familiar with the basics.

System Requirements

In order to use the “desktop version” of TSM, your computer and network must meet the minimum system requirements:

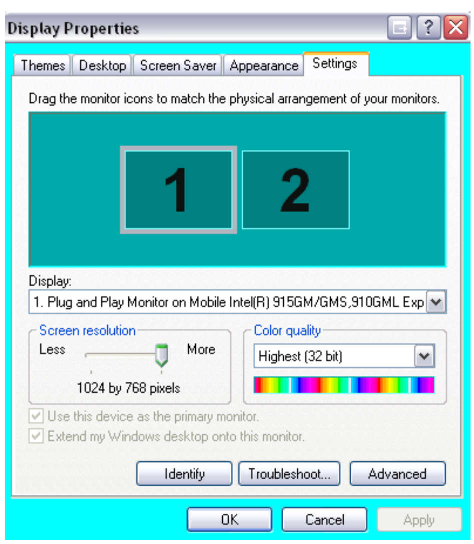
- Intel or AMD PC Computer with 4GB RAM or greater
- Windows 8/8.1, Windows 10+
- Microsoft Internet Explorer 10 or greater. (***We only support Internet Explorer***)
- 1MB DSL Internet Connection (***High-speed broadband connection recommended***)
- Inkjet or Laser Printer
- Valid e-mail address for order inquiry and confirmation

For the Mobile Sales Center and Technician Mobile Only editions, please see the included Appendix for the mobile equipment and network requirements.

Screen Settings

To ensure the best possible screen display of Total Shop Management© you will need to check and adjust your computer screen settings.

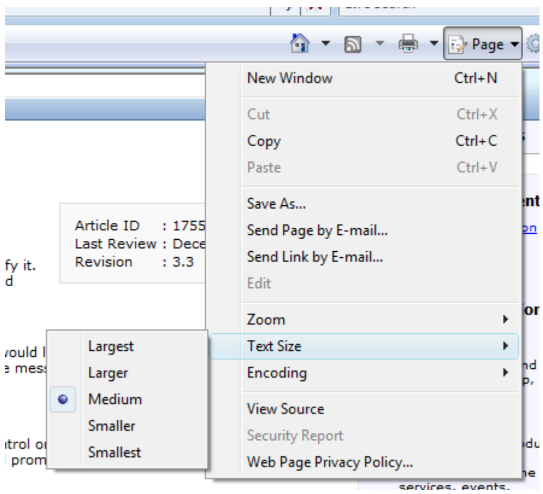
Screen Resolution: From your Desktop, right mouse click on any blank area of the screen, and select **Properties** from the menu. Go to the **Settings** tab, and change or adjust the screen resolution. Increasing the resolution will improve the screen view. Each system is different; your system’s maximum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



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 6 AND BELOW.**



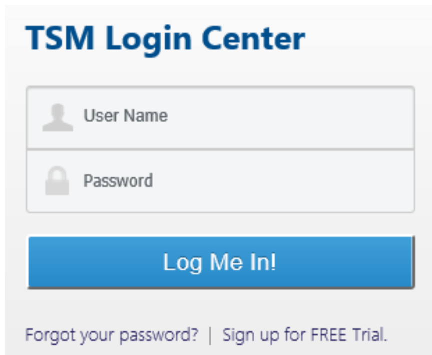
Browser Security

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

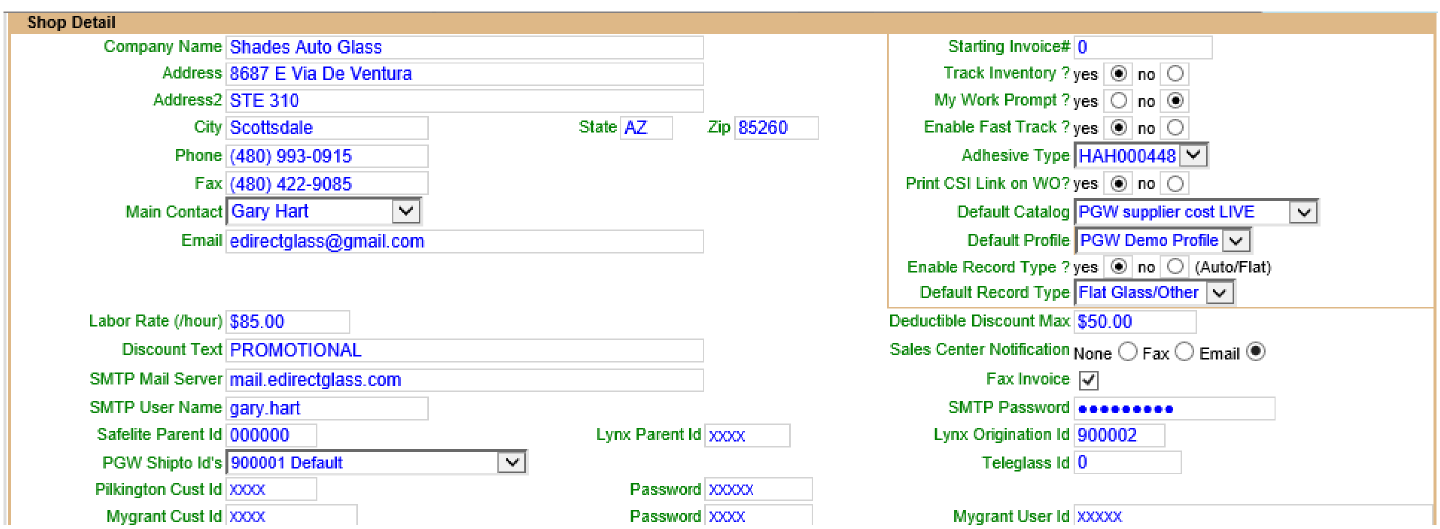
PLEASE FOLLOW THE INSTRUCTIONS FOUND IN 'APPENDIX A' NOW BEFORE CONTINUING THIS QUICK START GUIDE.

Getting Started - Login

1) To begin, connect to the Internet and launch Internet Explorer.
2) In the address bar, type https://live.edirectglass.com and press enter.
3) At the login website, enter your User Name and Password then click the login button.



4) After you are logged in, click on the Administration button on the main toolbar.
5) Click on the System Admin button on the sub-menu toolbar.
6) In the 'Shop Detail' screen, verify that all of the address information is correct.
7) Enter your Labor Rate.
8) Enter your Safelite and LYNX information if applicable.
9) If you want to track your local shop inventory, you ***must*** select 'Yes' by checking that box.



Supplier Center Credentials – *NOTE*

If you will be using the included Supplier Center feature, you must fill in your credentials for either Pilkington or Mygrant in the area provided in Shop Detail. You may obtain these credentials from your respective supplier.

NOTE:If you want PGW pricing and supply information, you must send your request to maria.iorio@edirectglass.com so we may set this up in the GLAXIS system.

10) Next you will need to fill in your applicable tax information. In the Federal box put either your Federal Tax ID or your Social Security number depending on how your business is setup.

	Tax Id	Tax Rate Parts	Tax Rate Labor
Federal	8766455544	0.000	0.000
State	76228833P	1.500	0.000

Next you must setup any County and City tax profiles. To do so, click on the [Add Tax-ID] button and follow the on-screen prompts.

11) After you have completed the tax setup, you must now enter the hours and days of operation for your shop. In addition, if you plan on scheduling jobs in the system, you must choose either 'Hourly' or AM/PM based scheduling. **PLEASE NOTE: *Once you choose your 'Schedule Type', you cannot switch it back*!**

Hours of Operation		Days of Operation	
Start time	7 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 150	Enable Tech Service Area ☑

12) For the last step, input what you would like the Work Order and Invoice statements to display when you create a print out. You may change this at any time.

WO Statement

Assignment of Proceeds and Authorization to Pay:
Shades Auto Glass and / or its representatives guarantees : 1) THE USE OF NEW PARTS ONLY, 2) THE USE OF ALL PARTS MEET MANUFACTURERS' SPECIFICATIONS FOR THE VEHICLE. The glass listed has been replaced or repaired with

Invoice Statement

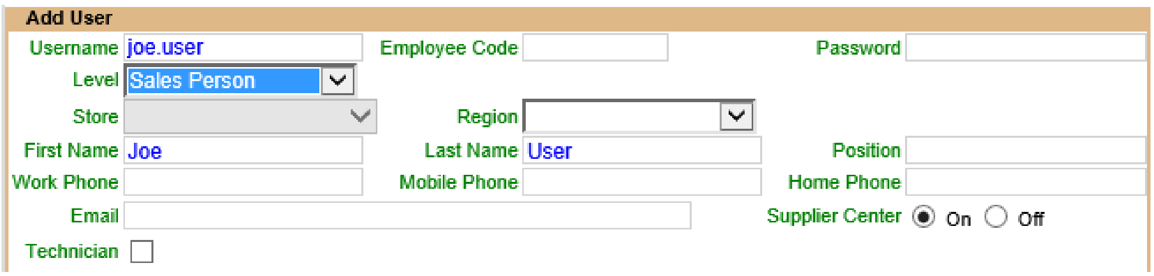
Assignment of Proceeds and Authorization to Pay:
Shades Auto Glass and / or its representatives guarantees : 1) THE USE OF NEW PARTS ONLY, 2) THE USE OF ALL PARTS MEET MANUFACTURERS' SPECIFICATIONS FOR THE VEHICLE. The glass listed has been replaced or repaired with

13) Once you have reviewed this page and have made any corrections or additions, click on the [Save] button to apply these changes.

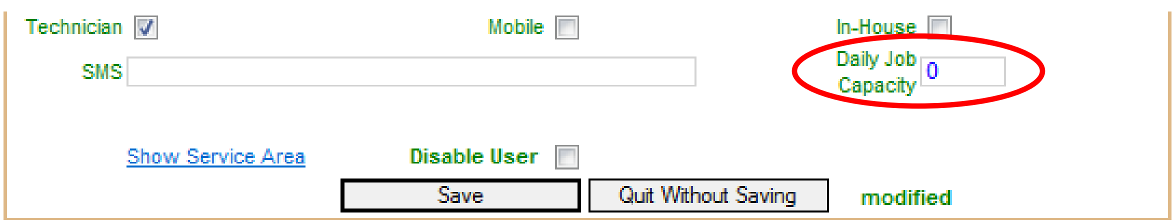
User Management

If you wish to give access to other users or if you will be using the schedule system, you must add these individuals to your account.

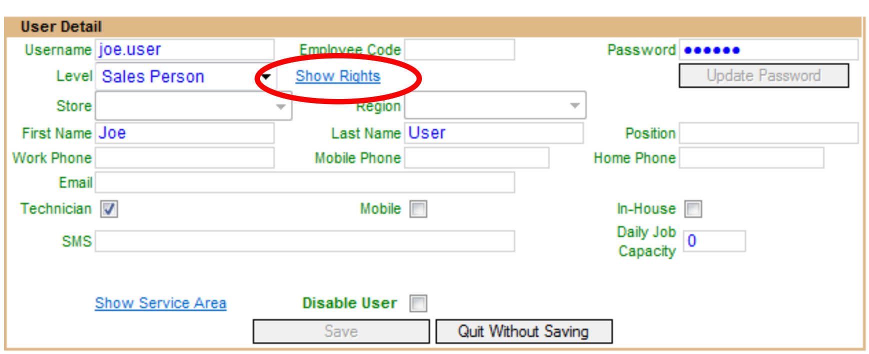
1) If you are not in the Administration section, click on the Administration tab located on the main toolbar.
2) Next, click on the User Mgmt found on the left toolbar.
3) Click on the Add User button found in the 'Find User' panel in the center of the screen.
4) Complete the 'Add User' panel with the individuals' information.



5) If you are using the schedule system, you must assign user status to your technicians even if they are not going to access the system. To do so, complete the step above and place a check mark in the 'Technician' box. Select whether or not the technician performs 'Mobile', 'In-House' or both. Enter a number in the 'Daily Job Capacity' field.



6) When you are finished, click on the Save button to save your changes.
7) If you want to allow the newly created user access to the program, you must give this user rights to all or some parts of Total Shop Management. To do so, click on the 'Show Rights' text in the middle of the saved 'User Detail' record.



8) On the 'Rights' screen, you must now add check marks in the 'Permission' column to allow this user access to these areas of the program. If you do not place a check mark in the box, the user cannot access that function.

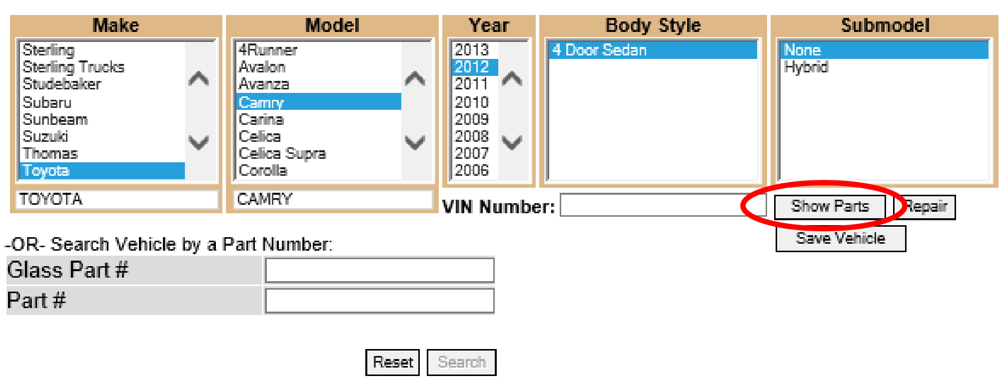
Description	Permission
Quotes and Invoicing	
New Assignments	☐
Look up NAGS	☐
Quotes	☐
Work Orders	☐
Scheduling	☐
Invoicing	☐
Convert Quote to WO	☐
Convert WO to Invoice	☐
Delete Quote	☐
Delete Work Order	☐

9) Once you are finished with assigning or removing permissions, click on the Save Changes button to return to the 'User Detail' panel.

Quick Quote

Here are the steps if you want to provide a quick quote using any Catalogue or NAGS part pricing. **PLEASE NOTE:** ***Your TSM account only comes with one (1) NAGS license unless you order additional user licenses. In order to lookup NAGS based pricing; a user must have a valid NAGS license. NAGS licenses are available for $325.00 per user, per year.***

1) Click on the Quotes & Invoicing button on the top main toolbar then click on the Quick Quote button on the left side toolbar.
2) On the look up screen, you can either build the vehicle by manually selecting the Make, Model, Year, Body Style and Sub-model or by entering the VIN Number. You can also find a vehicle by entering a Glass Part # or OEM Part #. Once you have built the vehicle, click on the Show Parts button.



3) On the next screen, select the area of glass you wish to see; windshield, side, vent, back, etc. **Before you click on a part item, please make sure you have selected the catalogue you wish to check pricing from.** By default, the "NAGS" catalogue is the default search catalogue unless you have setup your own default catalogue in Shop Admin. Once you have selected your catalogue, simply click on the part item row you wish to view.

Pricing Catalogue	Pricing Profile
Mygrant supplier cost LIVE	Included Mygrant

Glass ID	2012 Toyota Camry 4 Door Sedan	Dimension	Graphic	Info
FW03473	Windshield, W/Third Visor Frit, Solar Coated	37.5 x 54.5	View	
FW03485	Windshield, W/Third Visor Frit, Acoustic Interlayer, Solar Coated	37.5 x 54.5	View	
FW03486	Windshield, W/Third Visor Frit, Acoustic Interlayer, Condensation Sensor, Solar Coated	37.5 x 54.5	View	
FW03712	Windshield, Aftermarket, W/Third Visor Frit, Condensation Sensor, Solar Coated	37.5 x 54.5	View	
FV25222	Vent, Right, Rear, Solar Coated	10.5 x 13	View	
FV25223	Vent, Left, Rear, Solar Coated	10.5 x 13	View	
FD25311	Door, Right, Front, Solar Coated	21.25 x 42	View	
FD25312	Door, Left, Front, Solar Coated	21.25 x 42	View	

4) Now you will see a list of parts that correspond to the main glass item you selected above. In the 'Price' column, any price that is highlighted in blue indicates that the price is from the catalogue you selected; otherwise, the system displays the current NAGS price. *To build a quick quote, simply check off the parts you will use and the system will provide a running total at the bottom of the screen.*

	O	Part Id	MFG Part	Color	Vendor	Description	Qual	Ref	Qty	Unit	Price
☐		FW02598	FW02598GBNN	GBN	NAGS	Windshield		1	3.4	hrs	499.54
☑		FW02267	FW02267GBNN	GBN	NAGS	Windshield		1	3.4	hrs	375.01
☐		FW02267	56101-AA030-83	GBN	Toyota	Windshield		1	3.4	hrs	518.10
☐		HAH000004	HAH000004		NAGS	Adhesive	2.0 Urethane,Dam,Primer		1	each	32.00
☑		HAH000448	HAH000448		NAGS	Adhesive	2.0 Fast-Cure Urethane/Dam/Primer		1	each	67.50
☐		HBB038683	GGW 1019		Gold Glass Group	Blade	Wiper, 19"	0	1	each	7.72
☐		HBB038683	PWB-1019 S		Precision	Blade	Wiper, 19"	0	1	each	6.95
☐		HBB038689	GGW 1024		Gold Glass Group	Blade	Wiper, 24"	0	1	each	14.12
☐		HBB038689	PWB-1024 S		Precision	Blade	Wiper, 24"	0	1	each	12.78
☐		HML023522	75531-AA020		Toyota	Moulding	Reveal	6	1	each	85.80
☐		HML023522	CXP2267		Creative Extruded	Moulding	Reveal	6	1	each	46.69
☐		HML023522	FMB 2267-1Z		PerfecTrim	Moulding	Reveal	6	1	each	48.60

Discount: Convert to Quote Total $442.51

5) If you wish to save this quote, click on the Convert to Quote button.

Create a Quote and Work Order

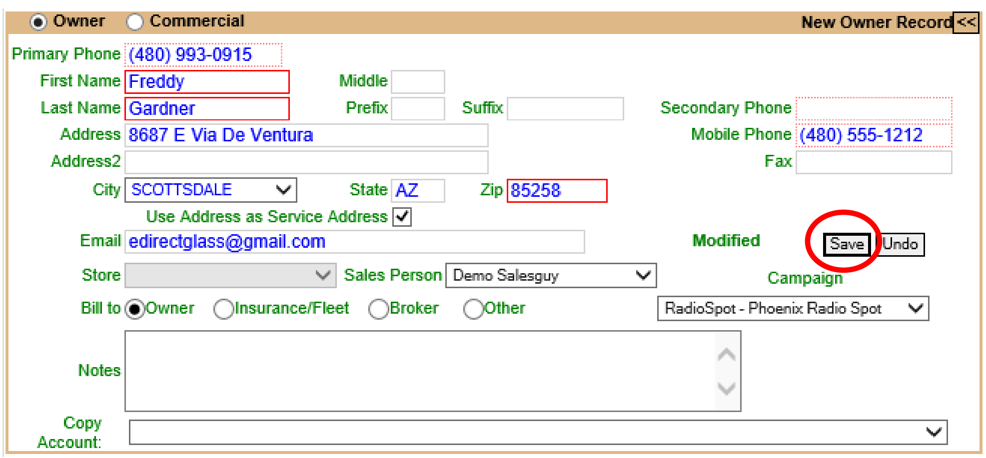
In order to create a Work Order, you must first create a Quote and then convert it to a Work Order. *If you do not need to schedule a job or create a work order, you can skip to the section 'Creating a Quick Invoice'.*

Create a Cash Quote

You can create a cash quote using either NAGS pricing or your own catalogue pricing.

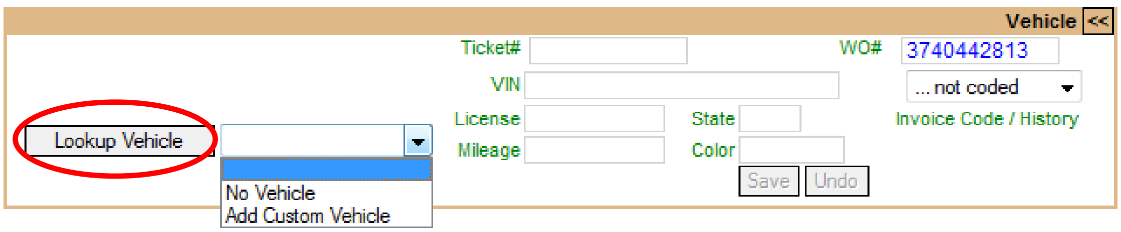
NAGS Based Quote:

1) Click on the Quotes & Invoicing button on the main toolbar and then the Quotes button on the left toolbar.
2) Now click on the Create New Quote button.
3) You must first decide whether the job is for an 'Owner' or for a 'Commercial' account.
4) You must fill out all of the fields that have a solid red box. Any box that has a dashed red box requires that one of them has data.
5) Next you must determine if the job will be billed to the 'Owner', 'Insurance/Fleet Company', 'Broker' or 'Other'. When you have entered this information, click on the Save button to continue.

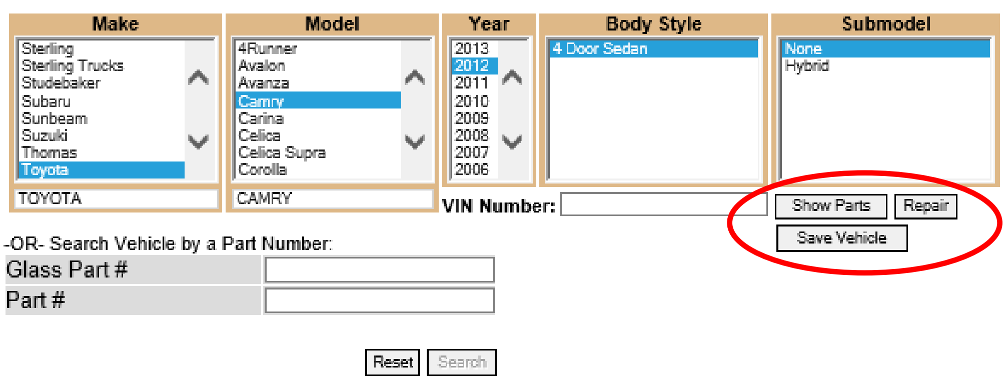


6) In our example, we have selected the 'Bill to' for the 'Owner'. If you would have selected any other 'Bill to', you would then look up the Insurance/Fleet or Broker company on the Bill To tab screen and fill in the necessary information. Since we have selected to 'Bill to' the 'Owner', the system will automatically take you to the Vehicle tab screen.

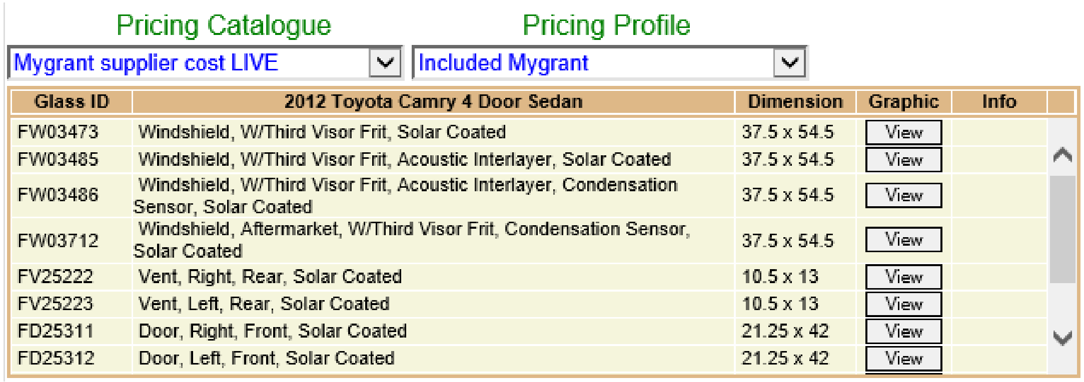
7) On the Vehicle screen you can either enter a VIN number or manually build the vehicle. If you have the VIN number, enter it in the VIN field and click on the Save button. Once you are ready to build the vehicle, with or without the VIN number, click on the Lookup Vehicle button.



8) If you entered a valid VIN number, the system will automatically build the vehicle. If you did not have a VIN number, you must build the vehicle by manually selecting the Make, Model, Year, Body Style and Sub-model. You can also find a vehicle by entering a Glass Part # or OEM Part #.
9) Once you have built the vehicle, you have a few choices to make.
   a. If you are performing a replacement, click the Show Parts button.
   b. If you are performing repairs or want to select a custom part from one of your catalogues, click the Repair button.
   c. If you want to save the vehicle to work on the quote at a later time, click on the Save Vehicle button.



6) On the next screen, select the area of glass you wish to see; windshield, side, vent, back, etc. **Before you click on a part item, please make sure you have selected the catalogue you wish to check pricing from.** By default, the “NAGS” catalogue is the default search catalogue. Once you have selected your catalogue, simply click on the part item row you wish to view.



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FV25222	Vent, Right, Rear, Solar Coated	10.5 x 13	View	
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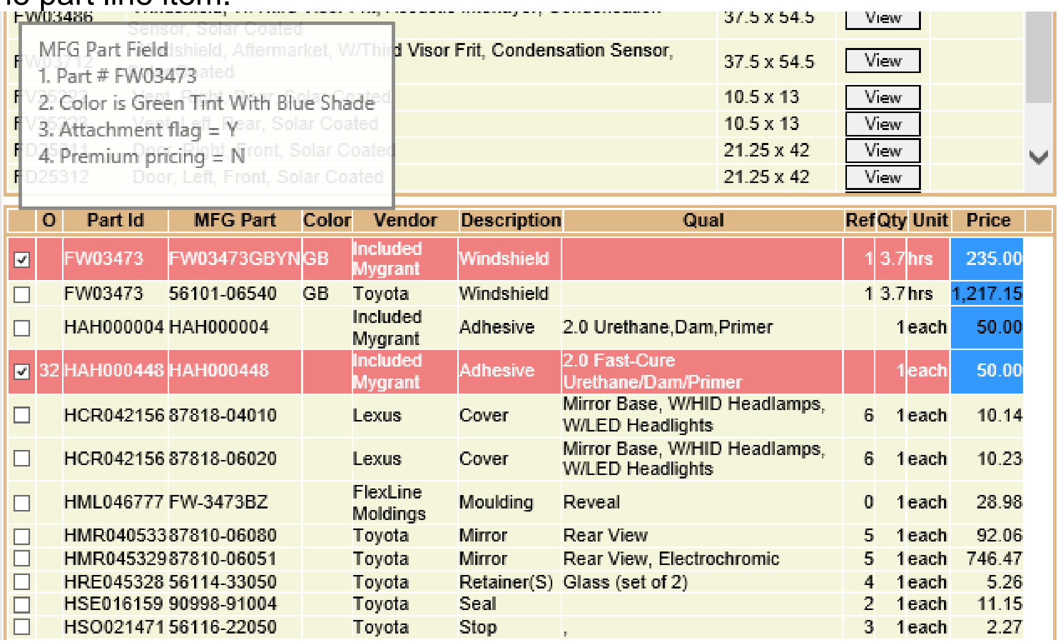
FD25311	Door, Right, Front, Solar Coated	21.25 x 42	View	
FD25312	Door, Left, Front, Solar Coated	21.25 x 42	View	

10) Now you will see a list of parts that correspond to the main glass item. In the 'Price' column, any price that is highlighted in blue indicates that the price is from a custom catalogue you selected; otherwise, the system displays the current NAGS price. Select the items you wish to place on the quote from this list by placing a check (*Click on the Check Box*) in the check box next to the part line item.



	O	Part Id	MFG Part	Color	Vendor	Description	Qual	Ref	Qty	Unit	Price
☑		FW03473	FW03473GBYN	GB	Included Mygrant	Windshield		1	3.7	hrs	235.00
☐		FW03473	56101-06540	GB	Toyota	Windshield		1	3.7	hrs	1,217.15
☐		HAH000004	HAH000004		Included Mygrant	Adhesive	2.0 Urethane,Dam,Primer		1	each	50.00
☑	32	HAH000448	HAH000448		Included Mygrant	Adhesive	2.0 Fast-Cure Urethane/Dam/Primer		1	each	50.00
☐		HCR042156	87818-04010		Lexus	Cover	Mirror Base, W/HID Headlamps, W/LED Headlights	6	1	each	10.14
☐		HCR042156	87818-06020		Lexus	Cover	Mirror Base, W/HID Headlamps, W/LED Headlights	6	1	each	10.23
☐		HML046777	FW-3473BZ		FlexLine Moldings	Moulding	Reveal	0	1	each	28.98
☐		HMR040533	87810-06080		Toyota	Mirror	Rear View	5	1	each	92.06
☐		HMR045329	87810-06051		Toyota	Mirror	Rear View, Electrochromic	5	1	each	746.47
☐		HRE045328	56114-33050		Toyota	Retainer(S)	Glass (set of 2)	4	1	each	5.26
☐		HSE016159	90998-91004		Toyota	Seal		2	1	each	11.15
☐		HSO021471	56116-22050		Toyota	Stop	,	3	1	each	2.27

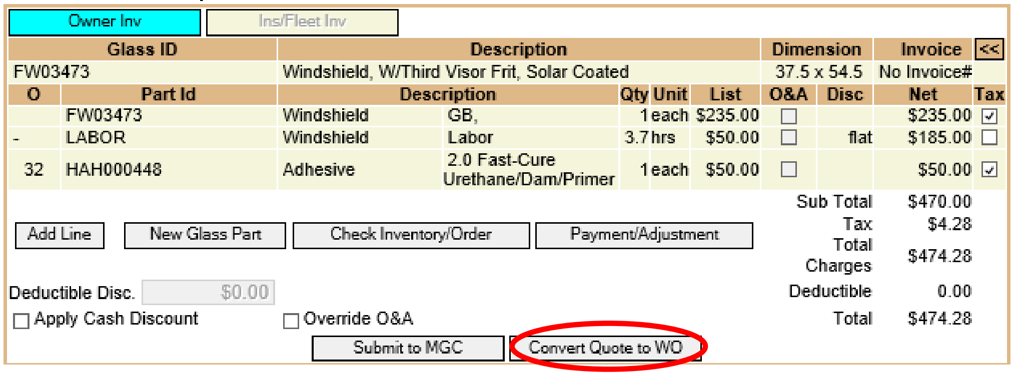
Special Feature:

Anytime you see a part line item that is highlighted in magenta, this indicates that the part is a valid NAGS "interchange" part. You can also find out the detail of any part by moving your mouse over the 'MFG Part' field and waiting a few seconds. The system will display a "hover" box with the part details, if any.

11) Once you have selected the parts for the Quote, click on the [Add Items to Quote] button.

12) The system will now take you back to the [Vehicle] screen.

13)Now we will convert this Quote to a Work Order by clicking on the Convert Quote to WO button found on the line item panel.



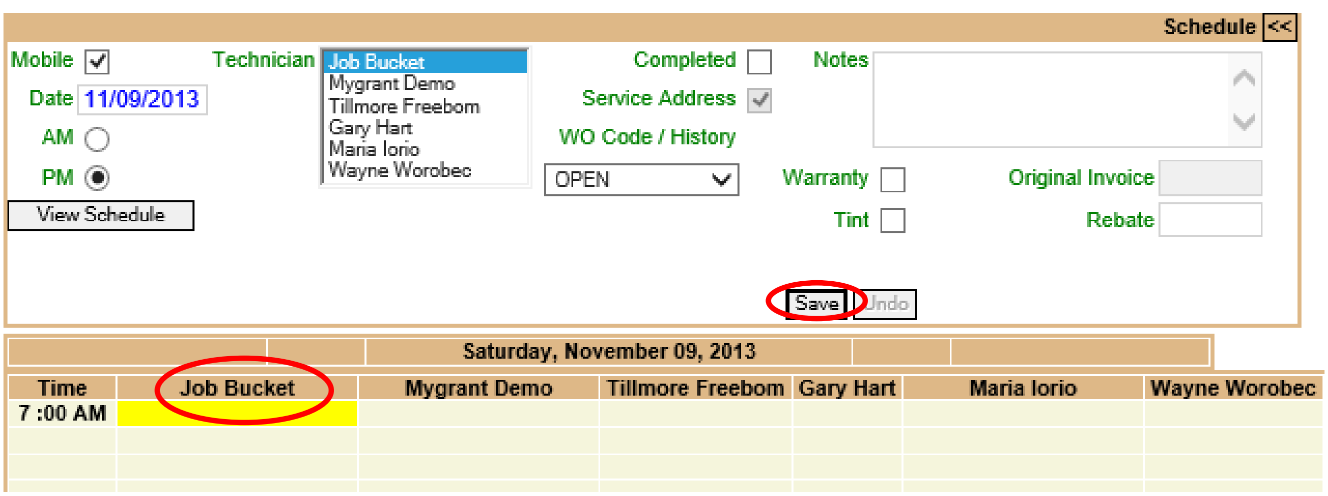
Working with Work Orders

14) After you have clicked on the Convert Quote to WO button in the last step, the system will take you to the **Schedule** screen. You can Schedule the job, print the Work Order, or convert the Work Order to an Invoice. **NOTE:** *In order to work with the Schedule system, you must have created Technicians in the User Management setup. Please refer to the 'User Management' section of this guide to create your technician accounts.*

Schedule a Job

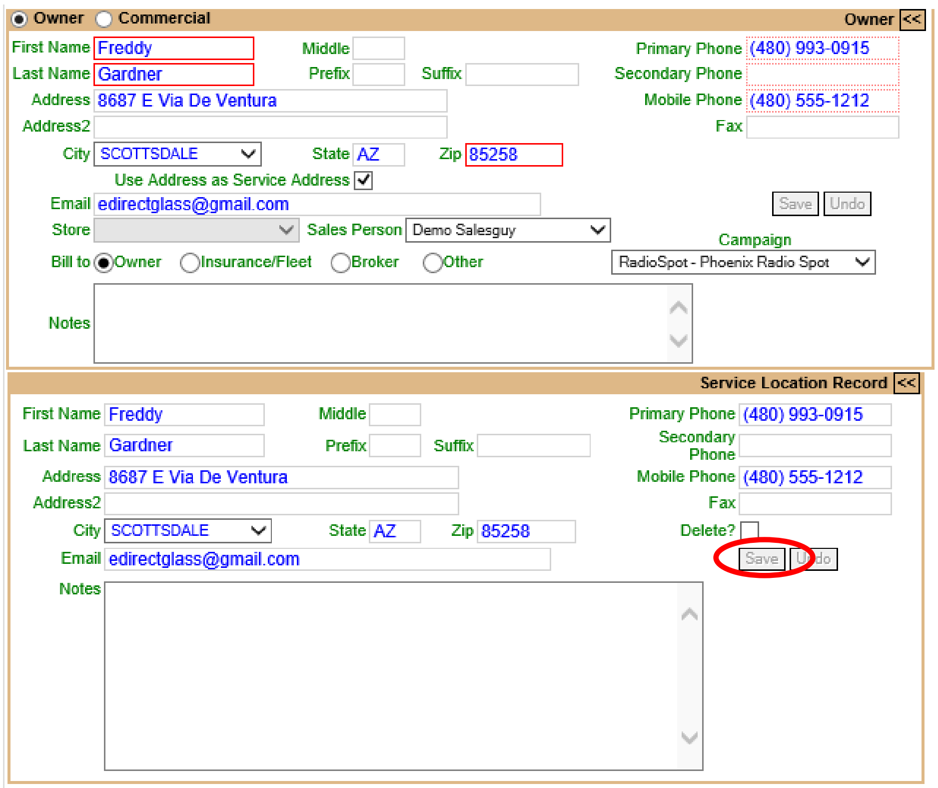
15) To schedule the job, verify the 'Mobile' check box is checked if the job will be out in the field then select the date you wish to schedule the job for. The system will then display the availability grid for the selected date.

16) Select a time space under any of the available technicians and the field will be highlighted in yellow. Click on the Save button to insert the job in the schedule.



Service Address

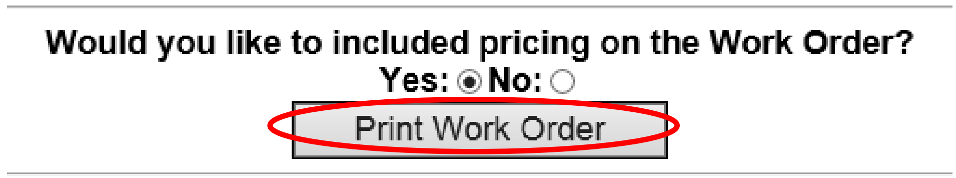
17) If the job will be performed in the field, you can enter a 'Service Address' where the job will take place. To create a 'Service Address', click on the Service Address button which will then take you back to the 'Owner' tab.
18) By default, the 'Service Address' is set to the address of the owner information. You can uncheck the 'Use Address as Service Address' box and enter the new information in the 'Service Location Record' panel.
19) There are no mandatory fields in the 'Service Location Record' panel but it is a good idea to fill in as much as you can and enter intuitive notes such as customer requests, cross streets, etc. Once you are done entering this information, click on the Save button. The 'Service Location Record' information will print on the printed Work Order.



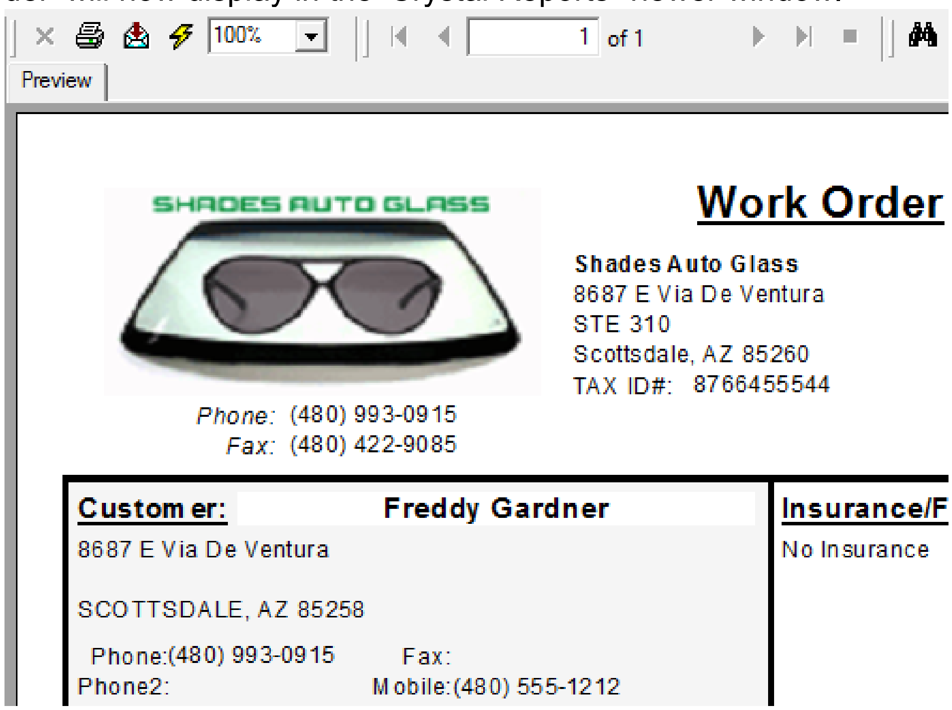
Print a Work Order

20) To print a Work Order, click on the Print Work Order button on the left toolbar.
<u>NOTE:</u> If this is your first time printing a report in Total Shop Management, please follow the instructions in Appendix A in order to install the 'Crystal Reports' viewer in Internet Explorer.

21) Next, the system will create a new browser window that will ask you if you want to include pricing on the Work Order. *This is a helpful tool if you do not want the customer to see pricing on the Work Order*. Answer 'Yes' or "No' and then click on the Print Work Order button.



22) The 'Work Order' will now display in the 'Crystal Reports' viewer window.



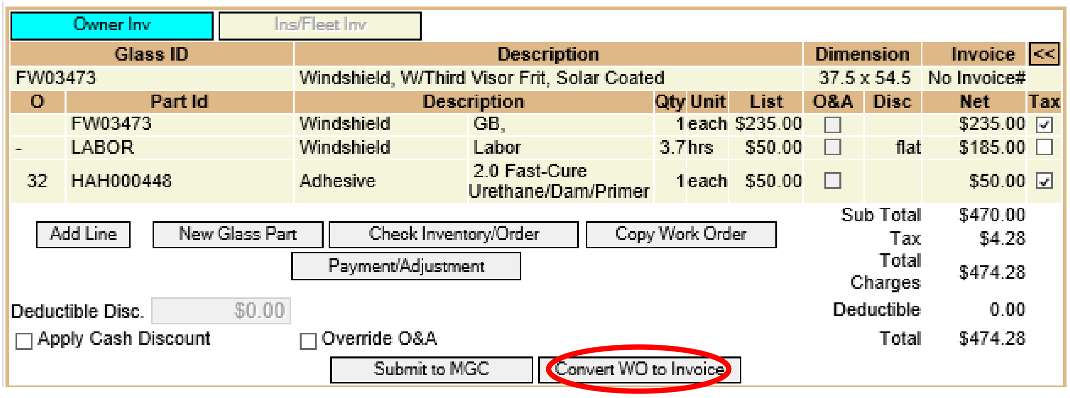
23) To print the Work Order to your printer, click on the button and select the printer. To close the viewer, simply close the browser screen.

eDirectGlass

Complete a Work Order – Convert to Invoice

When you have completed a Work Order, you can now complete the Work Order record by recording various items such as Work Order Notes, Apply Customer Payments, adding additional line items and so on. Once you have completed these optional items, you are ready to convert the Work Order to an Invoice.

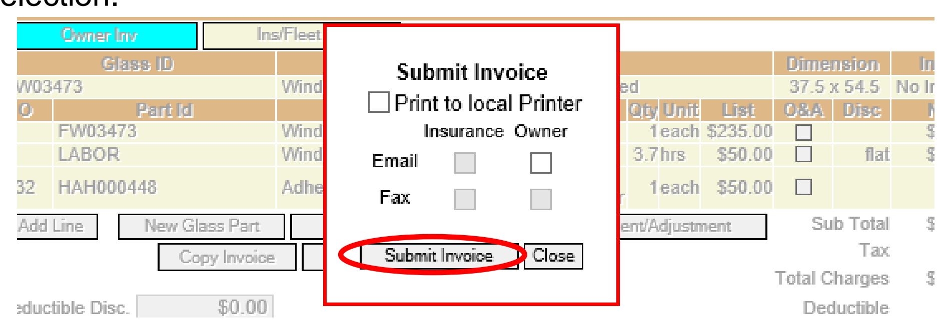
1) Open up the Work Order and select the Vehicle tab.
2) On the Vehicle screen, click on the Convert WO to Invoice button.



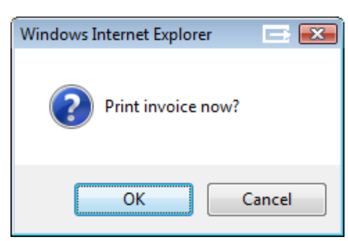
Working with Invoices

After you have converted a Work Order to an Invoice you can now finalize the Invoice by adding Invoice notes, adding additional line items applying payments and submitting the Invoice to a locked status.

1) When you are ready to lock an Invoice so no changes can be made, click on the Submit Invoice button.
2) The 'Submit Invoice to' screen will now appear. Select the method you would like to Submit the Invoice such as to the printer, email or fax. Click on the Submit Invoice button once you have made your selection.

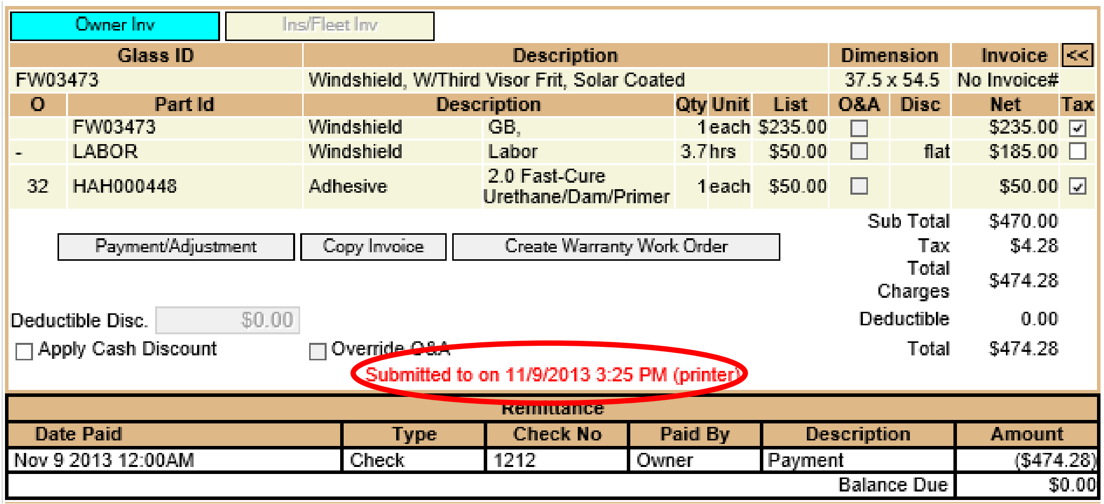


3) A pop-up window will appear asking you if you want to "Print invoice now?" At this point you can either print the Invoice or simply lock the invoice and return to the Invoice record screen. If you click on 'OK' to



print, the Customer Invoice will appear in a new 'Crystal Reports Viewer' window just as the Work Order print did.

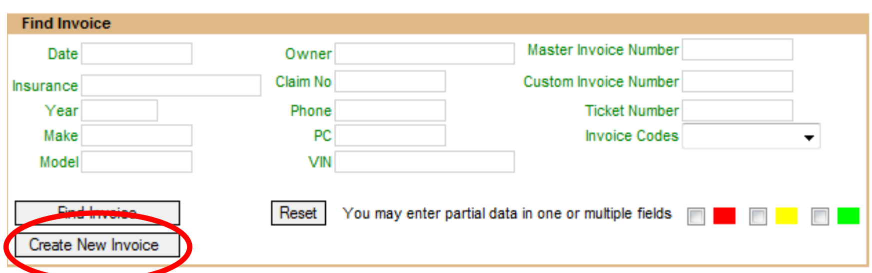
4) When you are returned to the Invoice detail screen, you will now see that the screen is marked with text that is circled in the graphic below. This indicates that the Invoice is locked.



How to Create a Quick Invoice

If you want to create an Invoice but do not want to go through the 'Quote', 'Work Order' and 'Schedule' process, you can directly create an Invoice without those steps.

1) Click on the Quotes & Invoicing button on the main toolbar if you are not in the Quotes & Invoice menu. Next, click on the Invoicing button on the left toolbar.
2) In the 'Find Invoice' box, click on the Create New Invoice button.



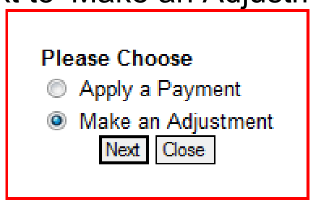
3) Follow the same instructions found in 'Creating a Quote' to complete the necessary information such as Owner, Bill to, Insurance, Loss Info and the Vehicle information.
4) ***Once you have completed that information, you can then refer to the 'Working with Invoices' section for completing and locking an Invoice.***

Adjustments and Credit Memos

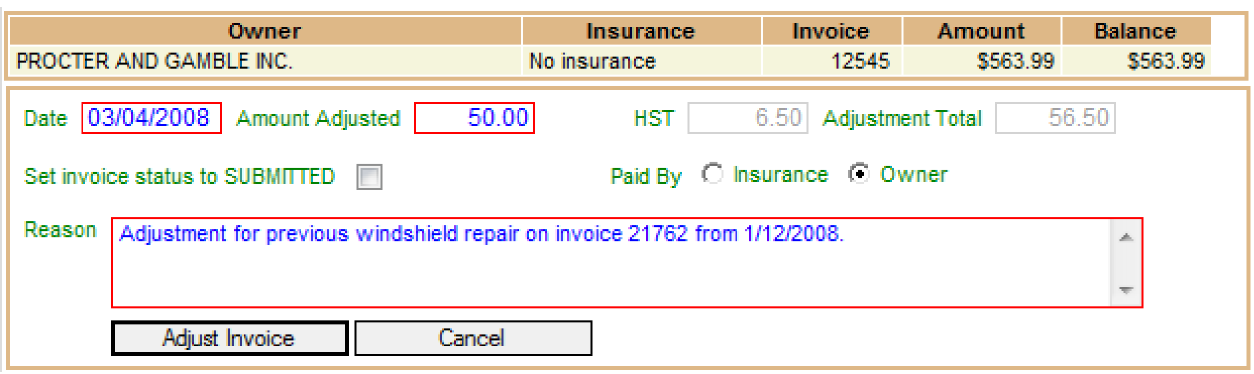
Adjustments

You can issue an ‘Adjustment’ in 2 places within the program. The first place you can issue an ‘Adjustment’ is while you are in an invoice with the ‘Vehicle’ tab open.

1) Click on the Payment/Adjustment button.
2) In the pop-up box, select the box next to ‘Make an Adjustment’ and click on next.



3) In the ‘Adjustment’ panel, enter:
   a. the amount to be adjusted (tax will be calculated automatically),
   b. Which invoice is to receive the adjustment, Insurance or Owner,
   c. A reason for the adjustment.



4) When you have entered the information, click on the ‘Adjust Invoice’ button.
5) The invoice screen will now display and you will see the ‘Remittance’ box that will contain the adjustment you just made along with an updated total for the invoice.

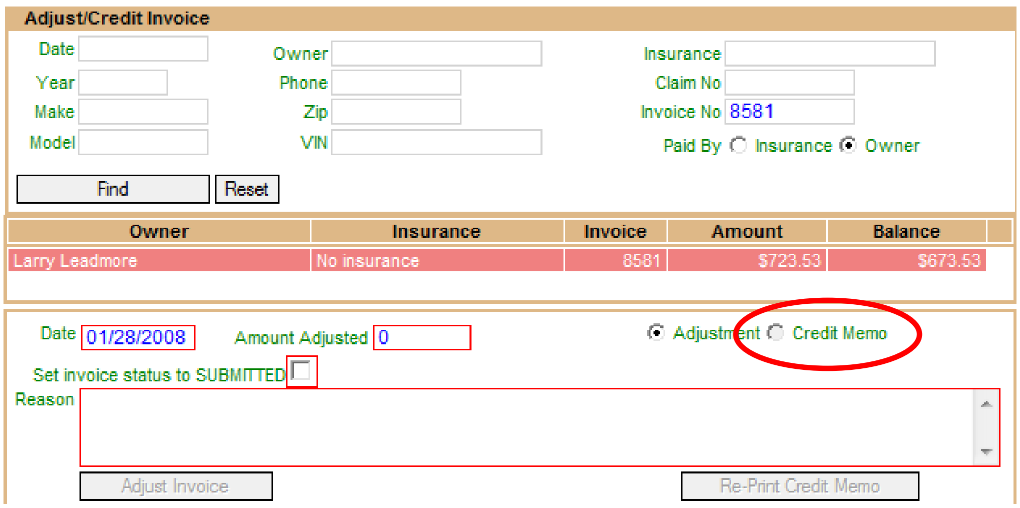
Remittance					
Date Paid	Type	Check No	Paid By	Description	Amount
3/4/2008	Adjustment	Adjustment	NA	Adjustment for previous windshield repair on invoice 21762 from 1/12/2008.	($56.50)
				Balance Due	$507.49

You may also create an Adjustment from the Accounting tab by selecting the Adjustments/Credits button in the Accounting sub-menu. Once you have clicked on this button, search for the invoice you wish to issue an adjustment for and then follow the step 3 above.

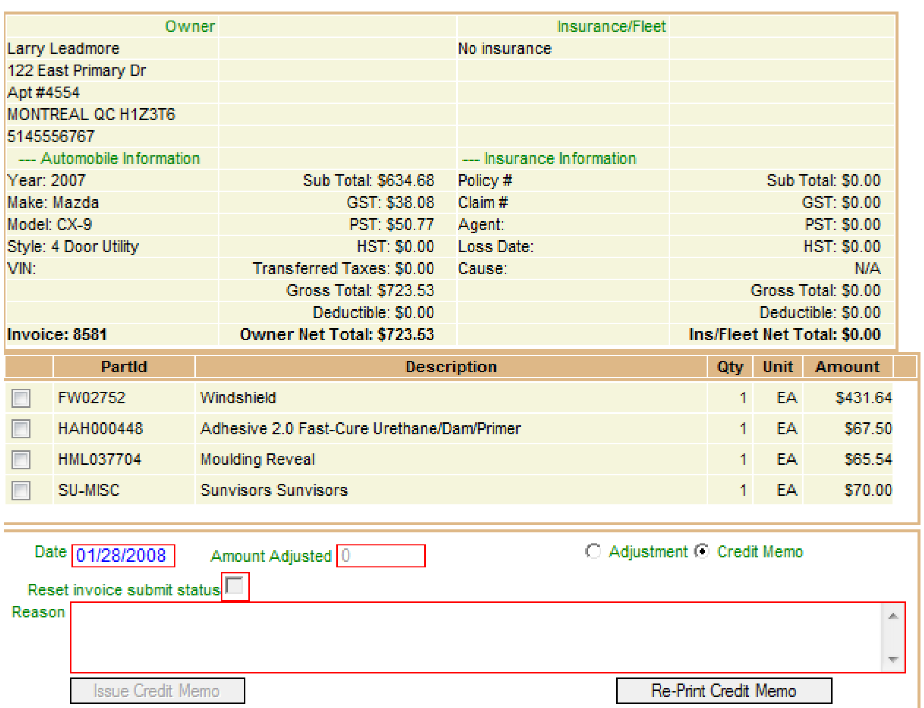
Credit Memo

You can issue a Credit Memo in Total Shop Management for any Invoice that has been submitted. To issue a Credit Memo, please follow these steps:

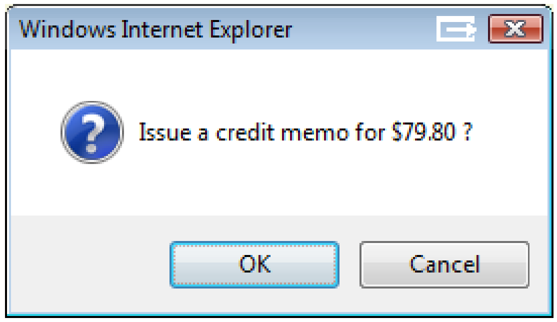
1) Click on the Accounting tab followed by the Adjustments/Credits button.
2) Find the invoice you wish to issue a Credit Memo for.
3) Once you click on the invoice you wish to work with, the Adjustment/Credit memo panel will appear at the bottom of the screen.



4) Click on the box next to 'Credit Memo'.
5) The screen will refresh and will now display the invoice details including the line items.



6) Select the items you wish to issue a Credit Memo for and enter a reason in the ‘Reason’ box for the issue of the credit.
7) When you are finished, click on the Issue Credit Memo button.
8) A pop-up box will appear asking you if you want to issue the Credit Memo. Click on ‘OK’ to issue the credit memo or click on ‘Cancel’ to go back.



9) The system will then launch a new window that will display the ‘Credit Invoice’ receipt. When you are finished printing this receipt, close the window to return to the program.
10) The ‘Credit Memo’ information will now display in the ‘Remittance’ tab if you go and lookup the invoice for review.

Remittance					
Date Paid	**Type**	**Check No**	**Paid By**	**Description**	**Amount**
1/28/2008	Adjustment	Adjustment	NA	Adjustment for delay in completing the job.	($50.00)
1/28/2008 1:38:28 PM	Credit	Credit	NA	Customer did not want the new visor look.	($79.80)
1/28/2008	VISA	011225	Owner	Payment	($673.53)
				Balance Due	($79.80)

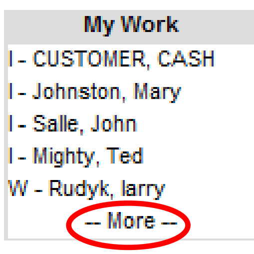
If you need to reference or re-print a ‘Credit Memo’ in the future, follow the instructions for issuing a Credit Memo above. When you see the invoice details screen, it will contain the items that have already had a Credit Memo issued against. At the bottom of the screen, click on the Re-Print Credit Memo button to print another copy of the ‘Credit Memo’.

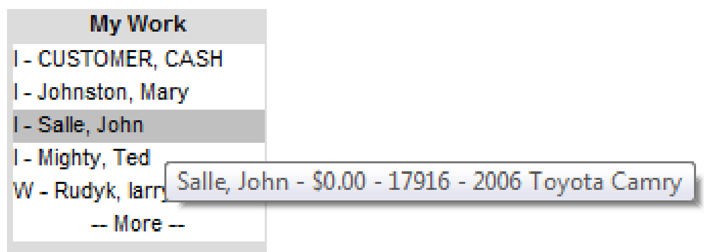
Short-cuts & Miscellaneous Features

My Work Panel

This panel can be found in the left toolbar area near the bottom of the screen. The 'My Work' panel allows quick access to previous Quotes, Work Orders and Invoices that you have accessed during your current session.

1) The 'My Work' panel will appear when you move away from any record.
2) At any time, you can click on any name in the list to go directly to that record.
3) If you have been in more than 5 records, the -- More -- button will appear. By clicking on this button, you will be given a list of all the records you have visited during the current session.
4) If you place your mouse over any of the names, a hover box will display the amount of the record, the Quote, Work Order or Invoice number and the vehicle information.
5) The letter before the name corresponds to the status of the record; Q for Quote, W for Work Order and I for Invoice.





Document & Image Attachments

You never have to file and keep a piece of paper related to a job every again! The system allows you to attach scanned documents and digital images directly to any record for safe and convenient storage and access.

There are 3 tiers to the Attachment system in Total Shop Management:

1) **Attachment Standard** - The original Attachment system that only supports the attachment of JPG, BMP or PNG files along with the ability to scan documents or photographs via the TWAIN interface.
2) **Attachment Plus** –Includes the ability to attach *any type* of file including PDF, video files, etc.
3) **Attachment Pro** – Includes the Attachment Plus advantages and the ability to send attachments from the field via a mobile device or from any device capable of sending email or MMS with attachments.

eDirectGlass

Attachment Standard ***($FREE – included with all TSM subscriptions)***

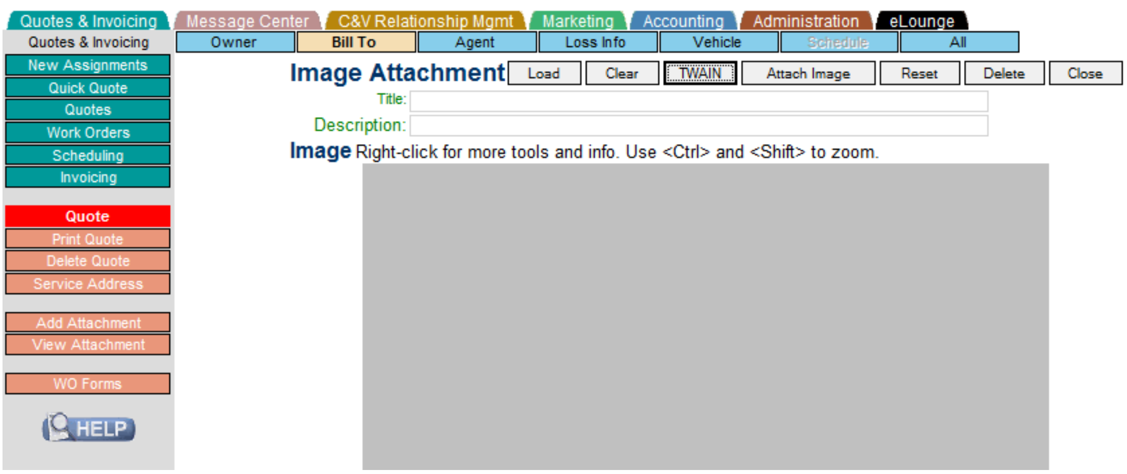
The ‘View Attachment’ screen allows you to:

a) Indicate whether the attachment is to be displayed with a Work Order or not.
b) Indicate whether the attachment is an ‘Inspection Image’ to be included on the ‘Vehicle Inspection’ screen, ‘Loss Info’ screen and on the ‘Inspection Report’.
c) Indicate whether the attachment, if an ‘Inspection Image’ is the actual image of the damage to be used in place of the standard graphic windshield diagram on the ‘Inspection Report’ and in the ‘Loss Info’ panel.
d) Change the attachment Title and Description fields.

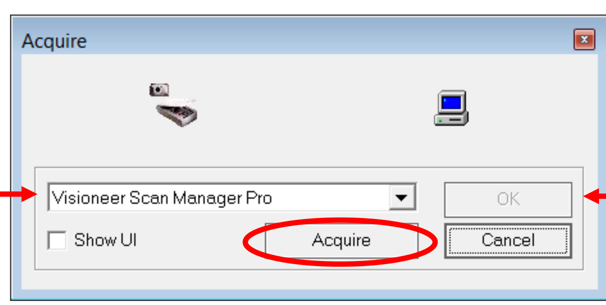
If you do not purchase the Plus or Pro attachment add-on packages, the ‘Add Attachment’ button will load the standard version as always.

PLEASE FOLLOW THE INSTRUCTIONS FOUND IN ‘APPENDIX’ A NOW BEFORE CONTINUING.

1) Once a Quote, Work Order or Invoice is opened, click on the ‘Add Attachment’ button. The Image Attachment interface will appear.

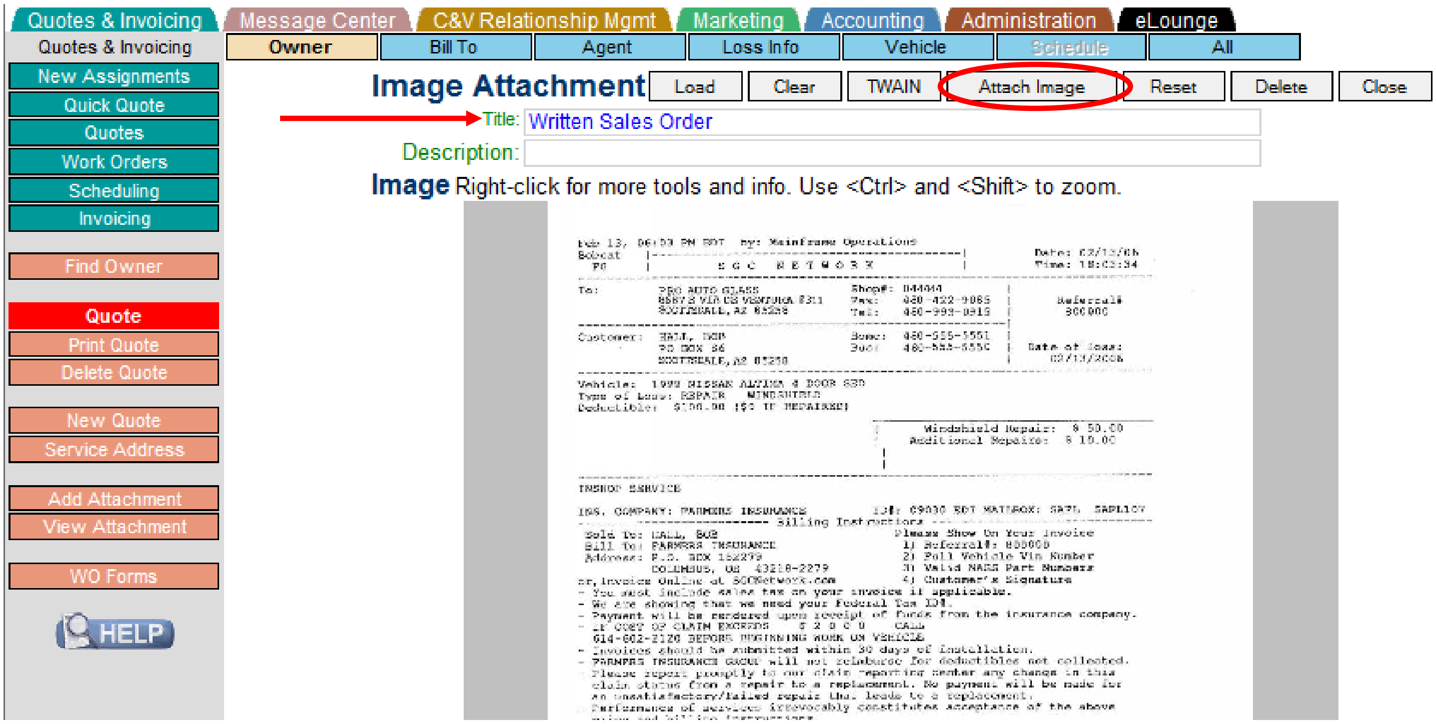


2) If you want to obtain a document or image from a scanner, click on the ‘Twain’ button, select your scanner and then click on the ‘Acquire’ button. Once the image is on the screen, click on the OK button.



3) If you want to attach a JPG, BMP or PNG image from your local hard drive or storage device, click on the ‘Load’ button, select your file and then click on the OK button.

4) In the ‘Title’ box of the Image Attachment screen, enter a name for the document or image. In the ‘Description’ box, enter a description for the document or image. Once you are ready to attach the image or document to the claim record, click on the ‘Attach Image’ button.

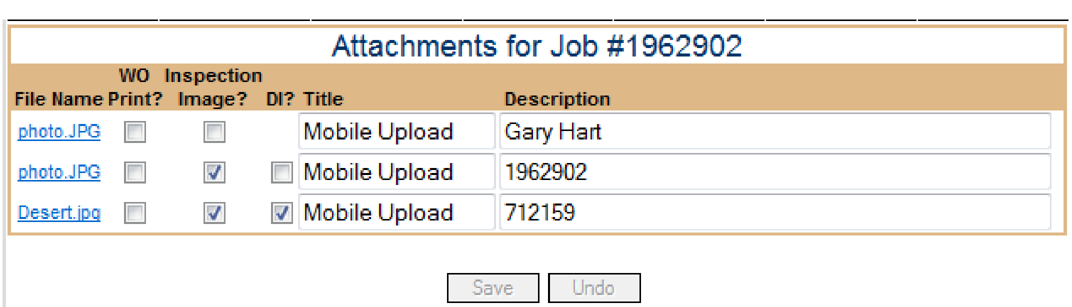


5) The scanned image will disappear from the screen when it is finished uploading. You can then verify that the image was attached by clicking on the ‘View Attachment’ button and then clicking on the image you just attached.

Using View Attachment

For any attachment you have placed with a record in TSM, you may view them in the respective record by opening that record up and clicking on the ‘View Attachment’ button.

When you click on the ‘View Attachment’ button, the screen will display all of the available attachments for that record and allow you to manage their status.



File Name – Click on the name of the file as stored in the database to review the attachment. *Please note, if the attachment cannot find a suitable viewer or player on your PC, it will prompt you to download the file or find one that will work with the attachment.*

WO Print? – This check box indicates whether or not you want to make the attachment available with the Work Order in the Inspection or Audit reports. These reports are made available by your shop to anyone who has the referral, authorization, claim or invoice number.

Inspection Image? – This check box indicates whether or not you want the image to be part of the Inspection Report. You can only designate 4 images for the Inspection Report; 2 images of the damage, 1 image of the VIN plate and 1 image of the license plate.

DI? – This check box may only be used with one 'Inspection Image'. When this box is checked, this image will become the primary "Loss Info" image for use in the 'Loss Info' tab and on certain reports.

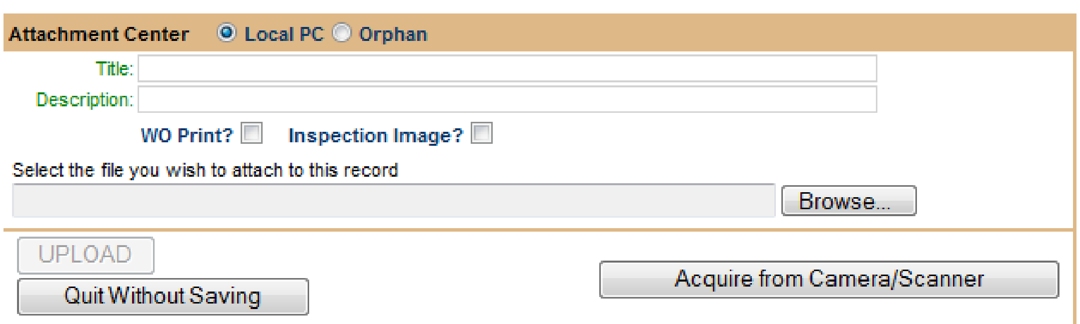
Title – You may add/change the name of the title for the attachment at any time. If you subscribe to the Attachment Pro add-on and a user has sent an attachment from a mobile device, the title will say "Mobile Upload" to indicate as such.

Description – You may add/change the name of the description for the attachment at any time.

Using the Attachment Plus add-on

This add-on allows the user to not only use the original functionality found in the Attachment Standard functionality, but also allows the user to upload *any file* to the record. There is a cost of $19.95 per month, per account, to use this feature.

If you have purchased the Attachment Plus add-on, clicking on the 'Add Attachment' button will display the following screen:



1) To attach a file from your local computer, click on the 'Browse' button, locate and select the file you want to attach.
2) Add a 'Title', 'Description' and optionally determine if the attachment is for the 'WO Print' or is an 'Inspection Image'.
3) When you are ready to attach the file, click on the 'Upload' button.

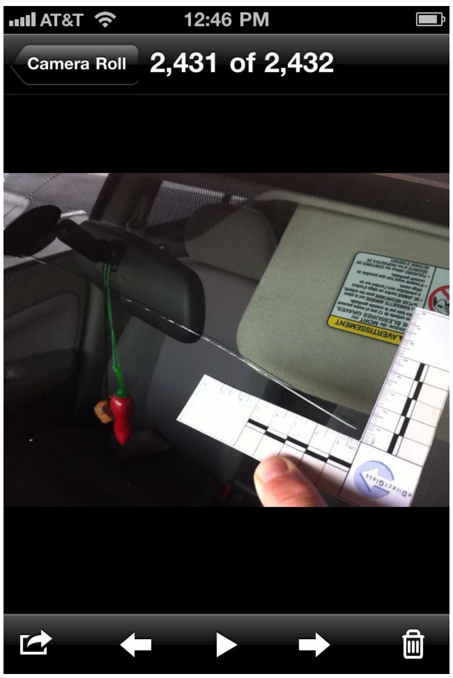
Note: If you want to attach an image/document using your scanner or other TWAIN compliant device, click on the 'Acquire from Camera/Scanner' button.

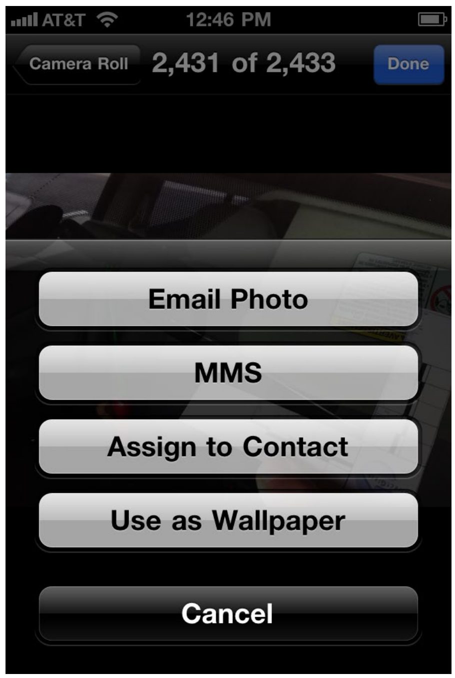
Using the Attachment Pro add-on

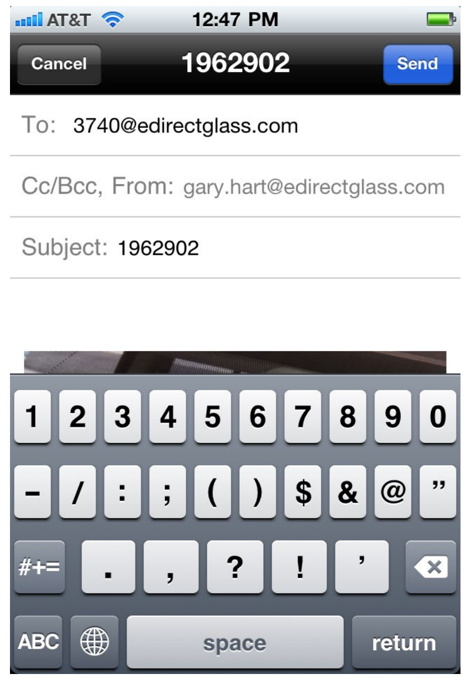
This new add-on allows any user the ability to email or MMS a file from their mobile device directly to a claim record or to the shop's account. There is a cost of $39.95 per month, per account, plus $.05 per mobile attachment to use this feature. *This add-on includes both the Standard and Plus add-on functionality.*

To attach a file from a mobile device such as an iPhone, Android or Windows Smart Phone:

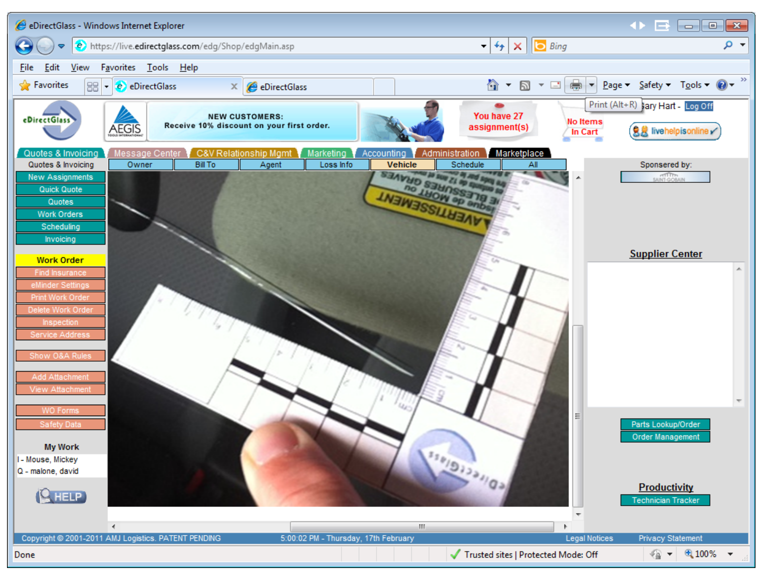
1) The user simply selects the photo, video, etc. they want on their mobile device,
2) Selects their eDirectGlass shop email account in the "Send To" or "To" field,
3) Enters either the system record number or owner first and last name and sends the item.







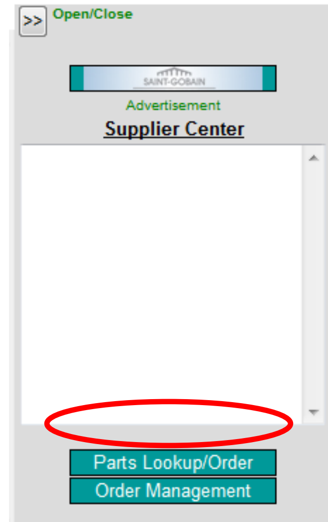
In the example above, a picture of the windshield damage was taken. From the mobile phone device, the 'Email Photo' button was selected. In the "To:" field, the provided eDirectGlass subscriber email address was used and since we knew the record number in our eDirectGlass account that we want the image attached to, we entered that in the "Subject:" field. Once all of this information was provided, we simply clicked on the 'Send' button and the image appeared in the claim record within 3-5 minutes.



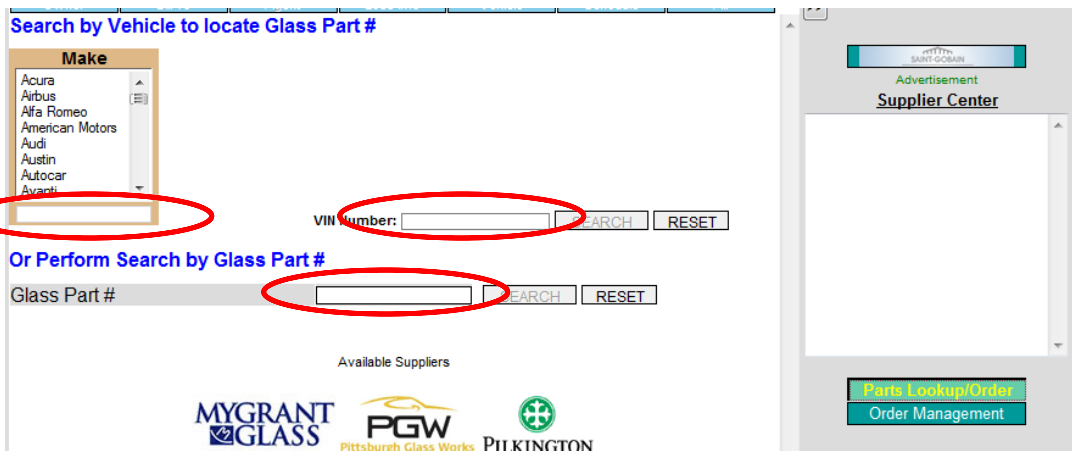
Supplier Center

The Supplier Center and Supplier Center Mobile edition allows you shop to obtain real-time pricing and stock information from Mygrant, PGW and Pilkington. The system will score the part information you supply as part of your inquiry and return the results based on lowest price and stock on hand from each respective supplier.

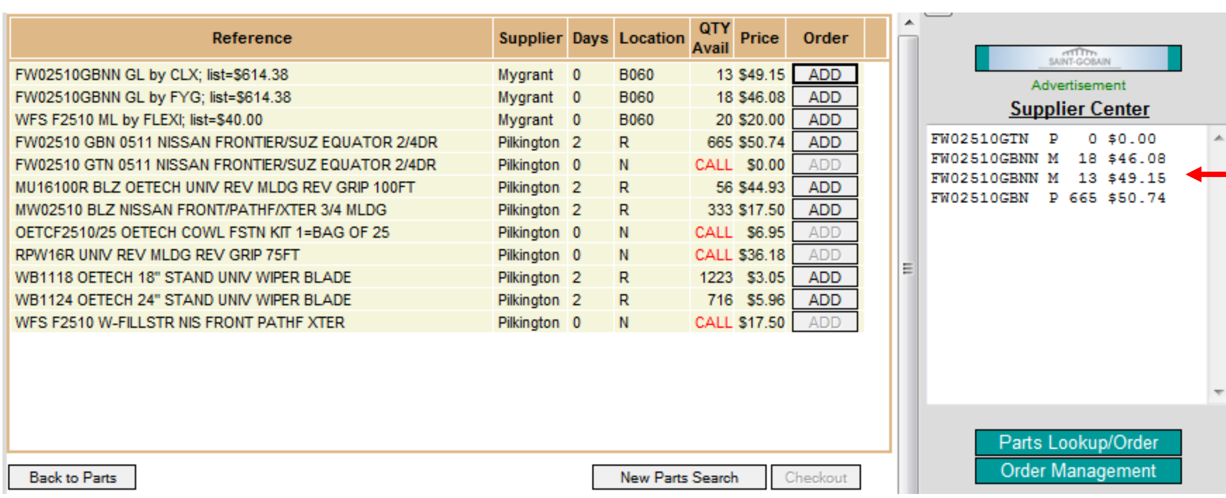
When you login to your TSM account, you will see the Supplier Center window on the right-hand side of your display. To use Supplier Center, simply click on the ‘Parts Lookup/Order’ button in this menu.



You have several ways to lookup part pricing information in Supplier Center; a) by building the vehicle and selecting from a list of available parts for it, b) entering the vehicle VIN number to display a list of available parts for the associated vehicle or, c) directly entering a qualified NAGS part ID.

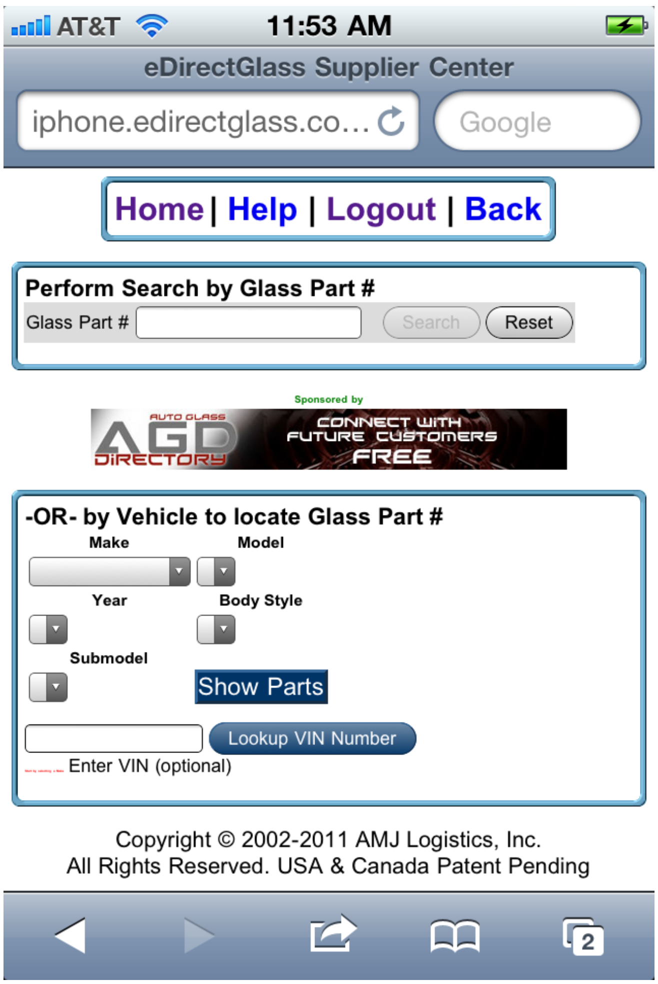


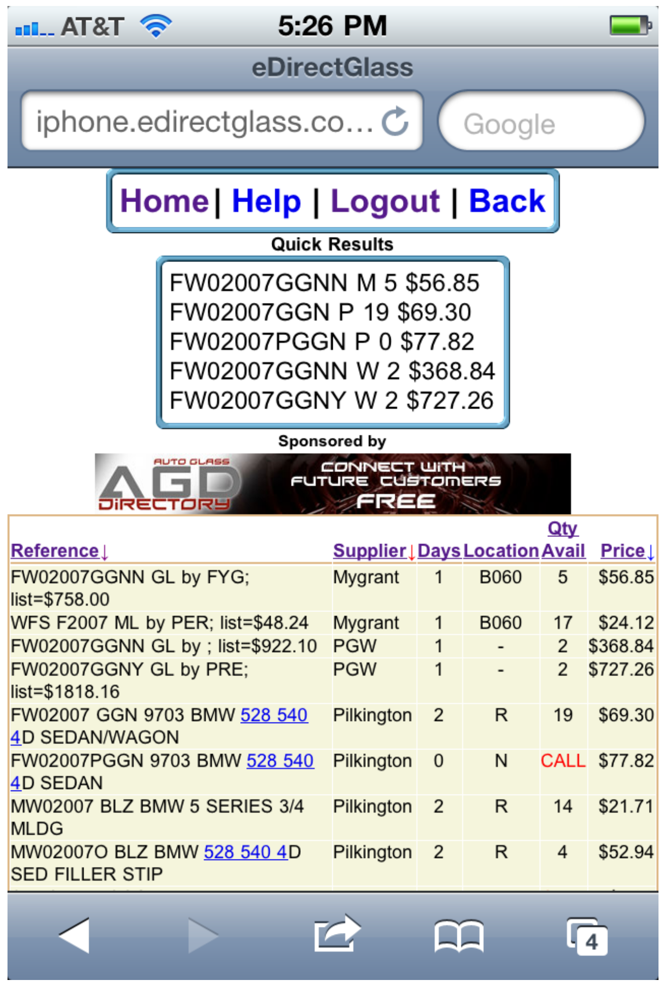
Once you have selected a part ID or have entered one, the system will display the results as provided by your suppliers.



From the main parts results window, you can order any available part by simply clicking on the ‘ADD’ button to place it in your shopping cart. You may continue to place items in your shopping cart and checkout at anytime; however, **please note that if you close your browser or leave your session for longer than 10 minutes, *you will lose the items* in your shopping cart and will have to start all over again.**

The Mobile Edition version of Supplier Center works the exact same way with the exception it does not have a method for you to order parts.





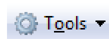
Appendix A – Configure Internet Explorer for Total Shop Management

***NOTE:* These instructions *only* apply to Internet Explorer 10 and above. We recommend that you upgrade to this new version if you are using any older version.**

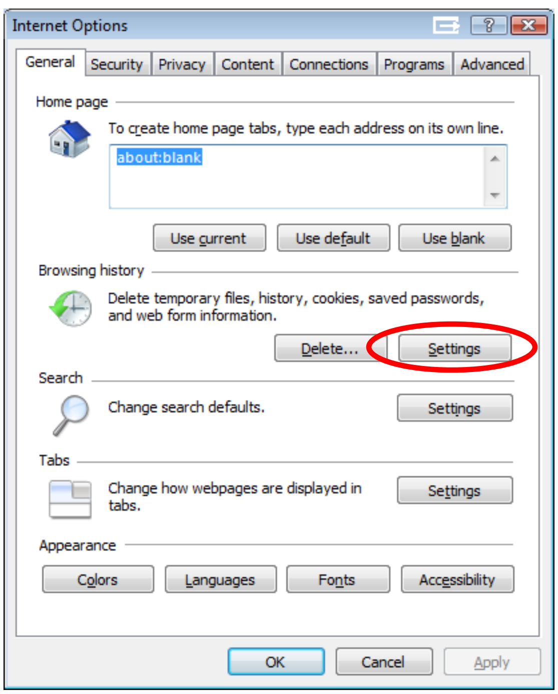
1) **Run the following links to automatically install the necessary settings for your 'Trusted Sites' security level settings:**

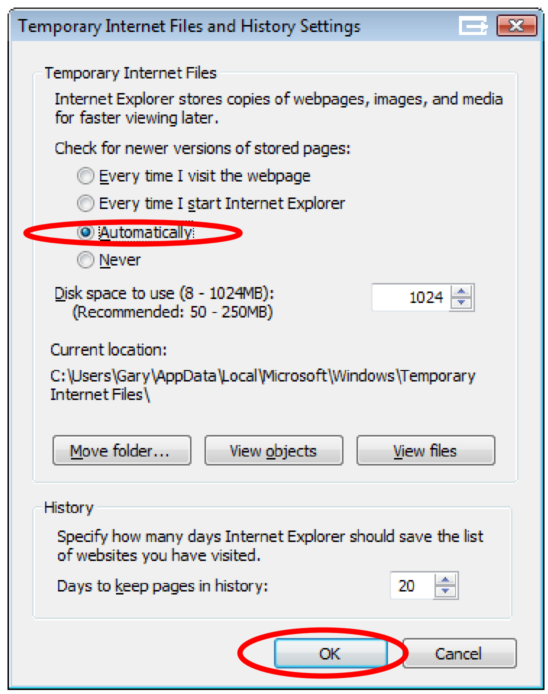
   http://www.edirectglass.com/downloads/edgtrustedsiteIE11.reg
   http://www.edirectglass.com/downloads/edgscripttimeout.reg

   NOTE: If your machine has multiple user login accounts, you must run this file under each user login.

2) In Internet Explorer, click on the 

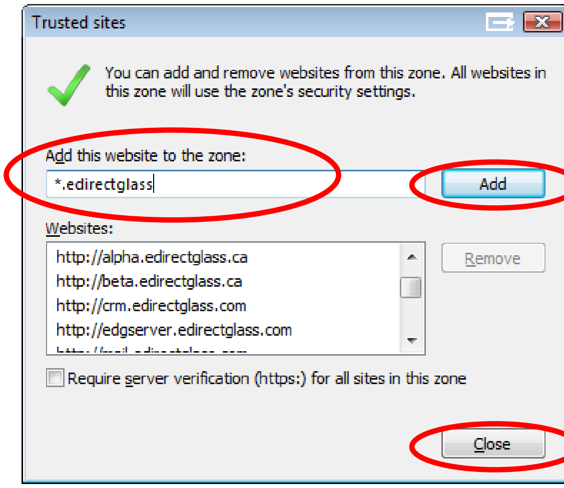
button and then select 'Internet Options'.
3) In the 'General Tab', click on the 'Settings' button under the 'Browsing history' section.
4) In the 'Temporary Internet Files and History Settings' window, make sure that 'Automatically' is selected and click on the OK button.





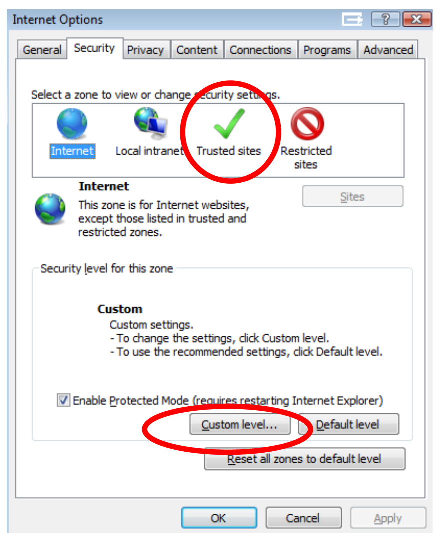
5) In the Internet Options Panel, Select the 'Security' tab.
6) In the 'Security' window, select the 'Sites' button.

7) Add *.edirectglass.com and live.edirectglass.com in the Trusted Site list as shown in the picture below and then click on the 'Close' button:

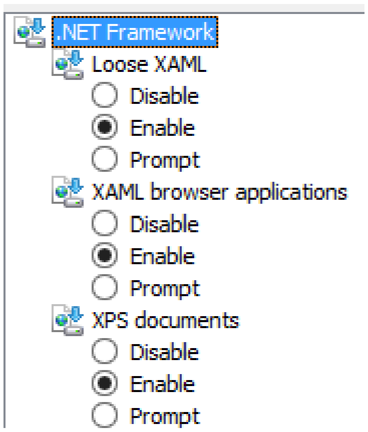


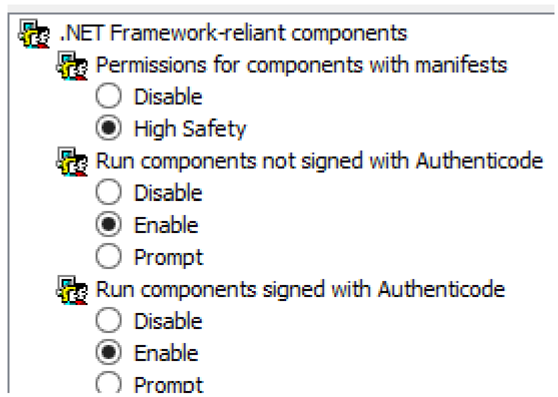
8) In the 'Security' window, select the 'Trusted Sites' icon and then click on the 

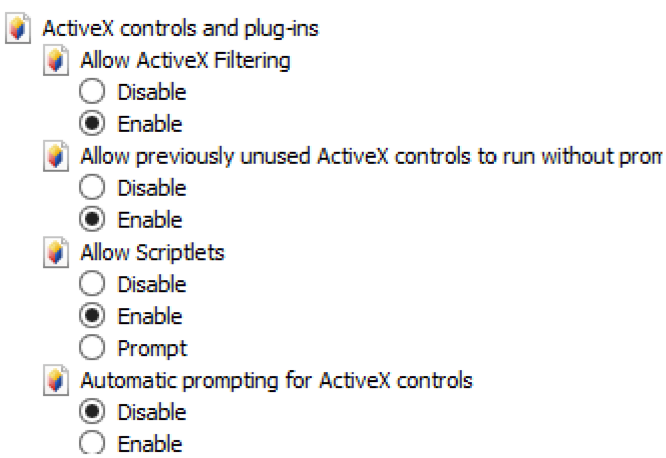
button.

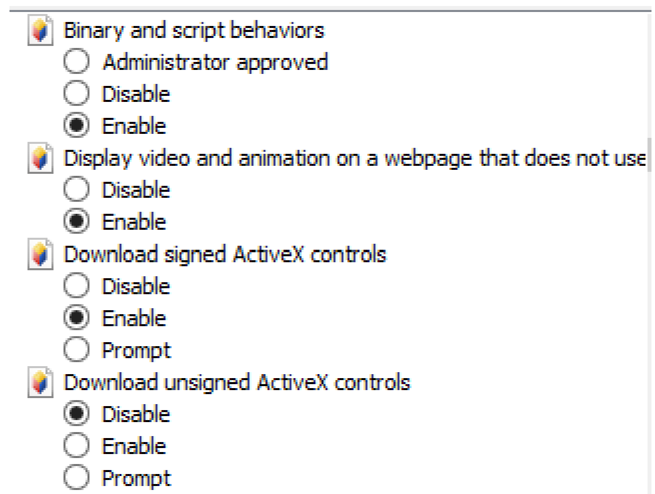


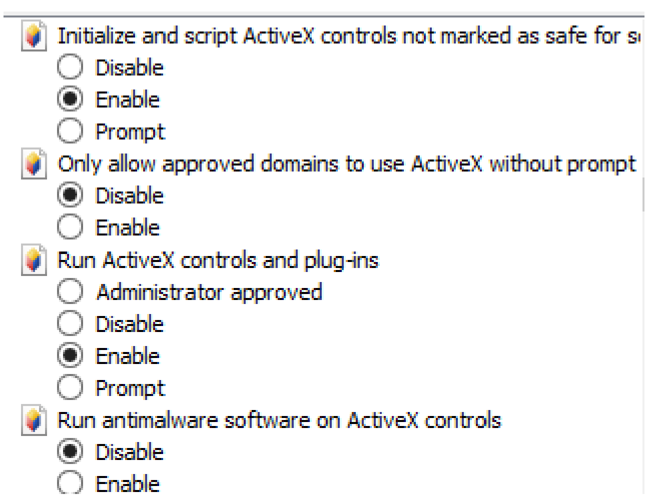
9) In the ‘Settings’ menu, verify the following items are set as displayed:
(***NOTE***: *These are IE11 settings and depending on your browser version, some items may be missing; however, that will not harm the operation of eDirectGlass*.)

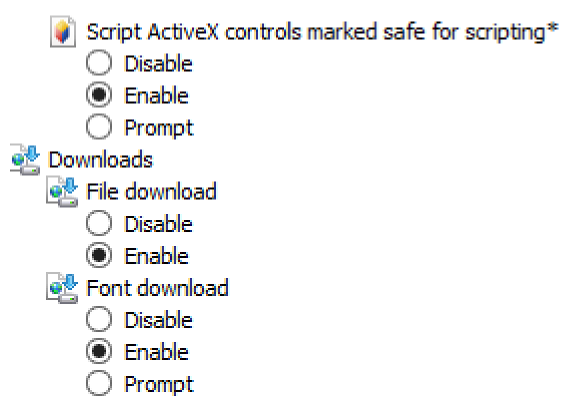




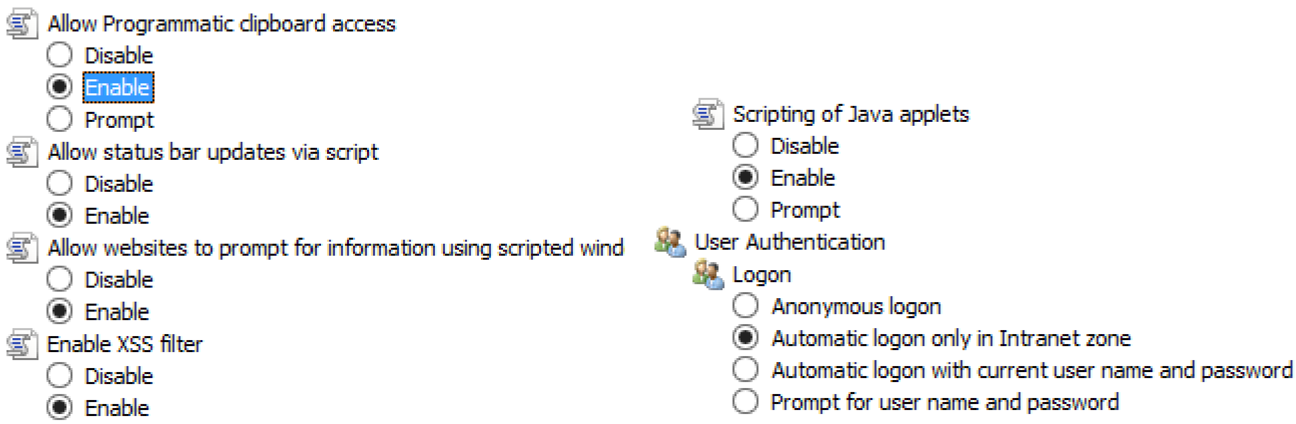








- Miscellaneous
  - Access data sources across domains
    - ○ Disable
    - ◉ Enable
    - ○ Prompt
  - Allow dragging of content between domains into separate wi
    - ◉ Disable
    - ○ Enable
  - Allow dragging of content between domains into the same wi
    - ◉ Disable
    - ○ Enable
  - Allow META REFRESH
    - ○ Disable
    - ◉ Enable
  - Allow scripting of Microsoft web browser control
    - ○ Disable
    - ◉ Enable
  - Allow script-initiated windows without size or position constrai
    - ○ Disable
    - ◉ Enable
  - Allow webpages to use restricted protocols for active conter
    - ○ 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 only one
    - ◉ Disable
    - ○ Enable
  - Drag and drop or copy and paste files
    - ○ Disable
    - ◉ Enable
    - ○ Prompt
  - Enable MIME Sniffing
    - ○ Disable
    - ◉ Enable
  - Include local directory path when uploading files to a server
    - ○ Disable
    - ◉ Enable
  - Launching applications and unsafe files
    - ○ Disable
    - ◉ Enable
    - ○ Prompt
  - Launching programs and files in an IFRAME
    - ○ Disable
    - ◉ Enable
    - ○ Prompt
  - Navigate windows and frames across different domains
    - ○ Disable
    - ◉ Enable
    - ○ Prompt
  - Render legacy filters
    - ○ Disable
    - ◉ Enable
  - Submit non-encrypted form data
    - ○ Disable
    - ◉ Enable
    - ○ Prompt
  - 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
    - ○ Disable
    - ◉ Enable
    - ○ Prompt

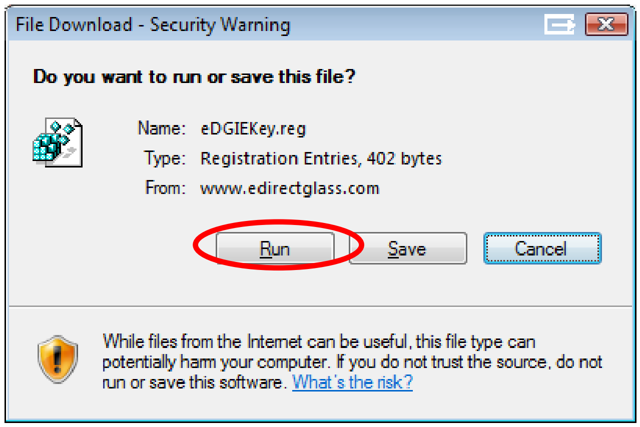


10) When you have verified these settings, click on OK to return to the 'Security' window.
11) At the 'Security' menu, click the 'OK' button and then **close all instances of Internet Explorer before performing the last step.**

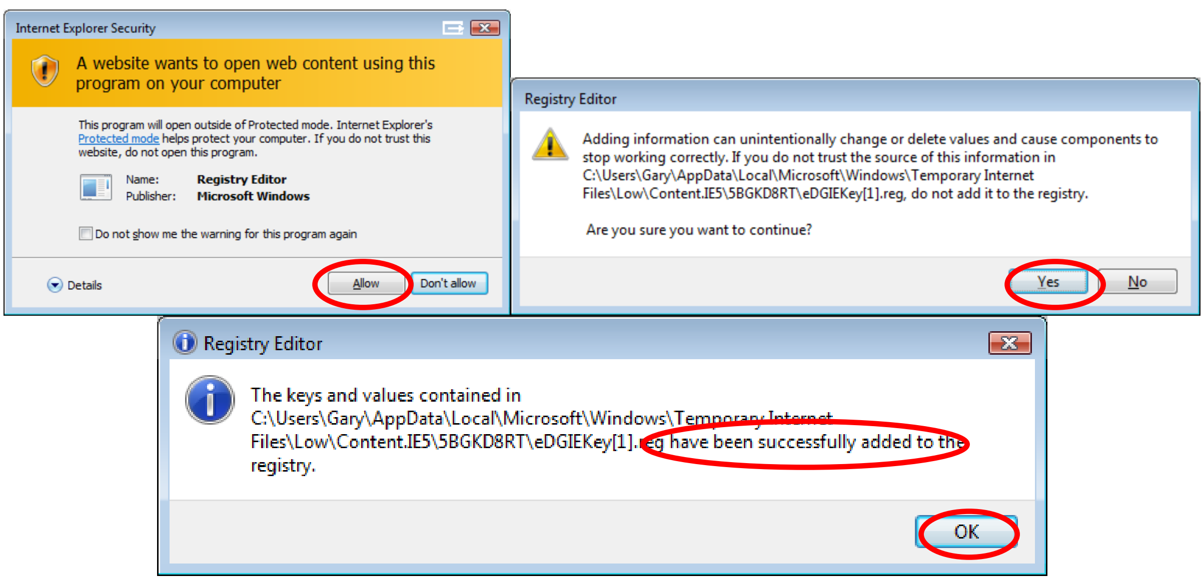
Configure the Registry for Attachments

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

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



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.

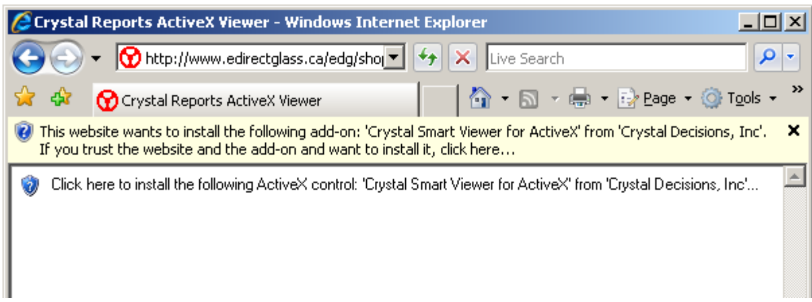


3) Open up Internet Explorer and you can begin using the Attachments feature.

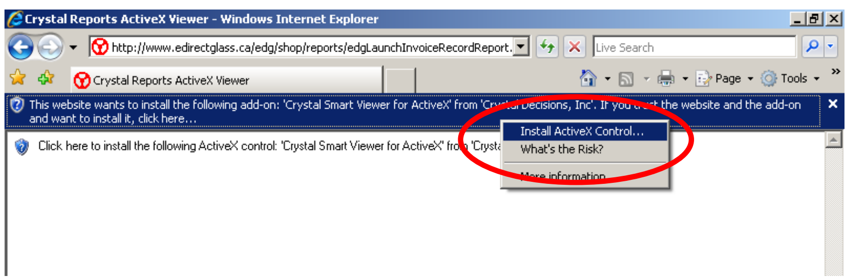
eDirectGlass

Appendix B – Installing Crystal Report Viewer

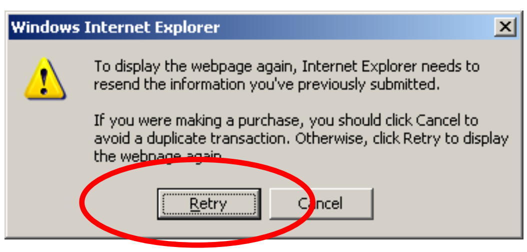
When you **<u>first click</u>** on any of the Print (<u>Quote, Work Order, Invoice</u>) buttons in Total Shop Management, it will prompt you to install the 'Crystal Smart Viewer for ActiveX'.



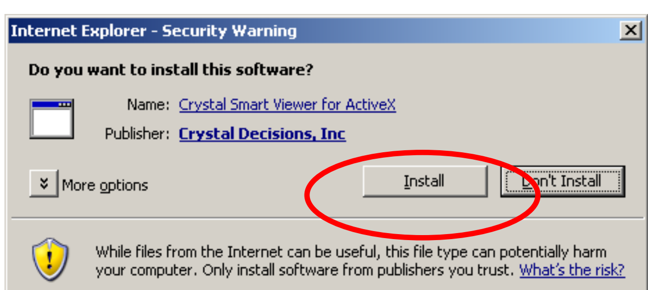
1) Click on the yellow highlighted area and a drop-down menu will appear.
2) Click on the 'Install ActiveX Control in the drop-down.



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



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.

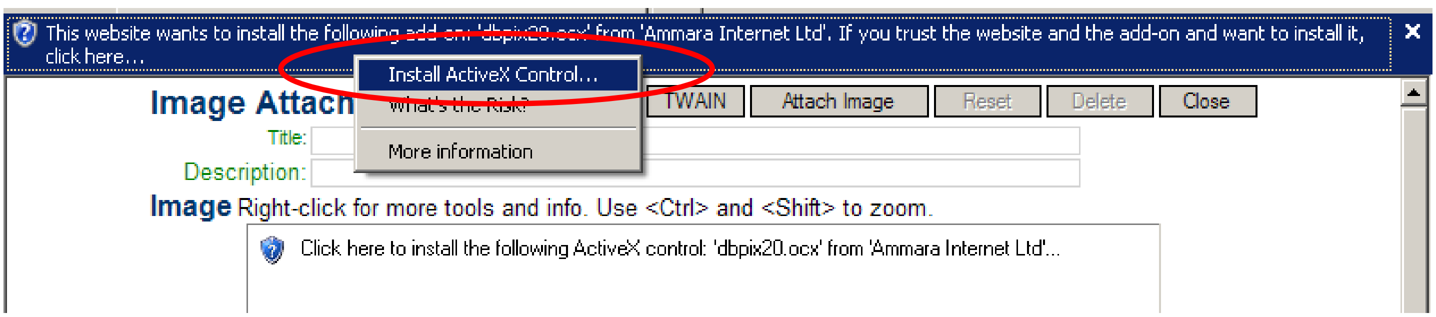


Appendix C – Installing DBPIX Attachment Plug-in

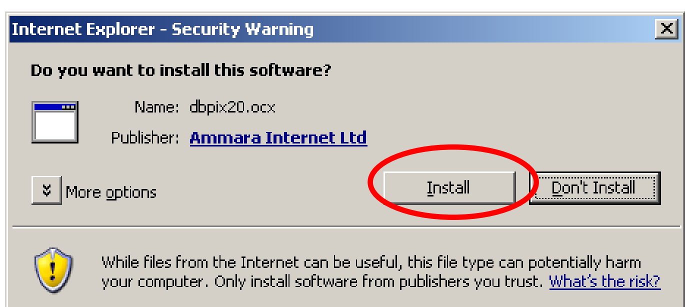
NOTE: Before you can use the Standard Attachment feature in Total Shop Management, you must first configure your computer and Internet Explorer.

Install the Attachment Plug-in

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…'



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



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

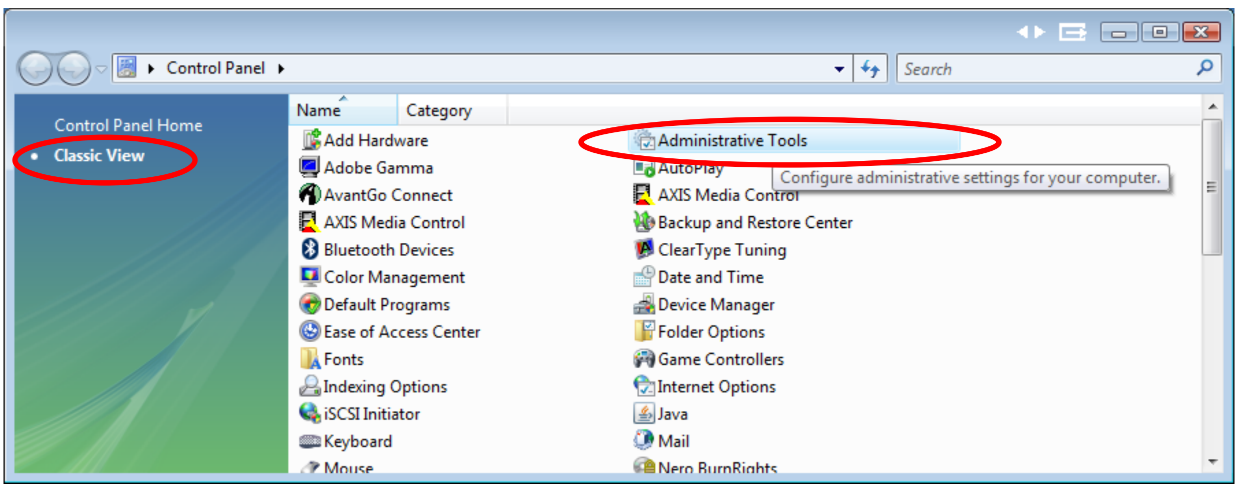
eDirectGlass

Appendix D – eDirectGlass© QuickBooks Pro/Premiere 2016+ Setup

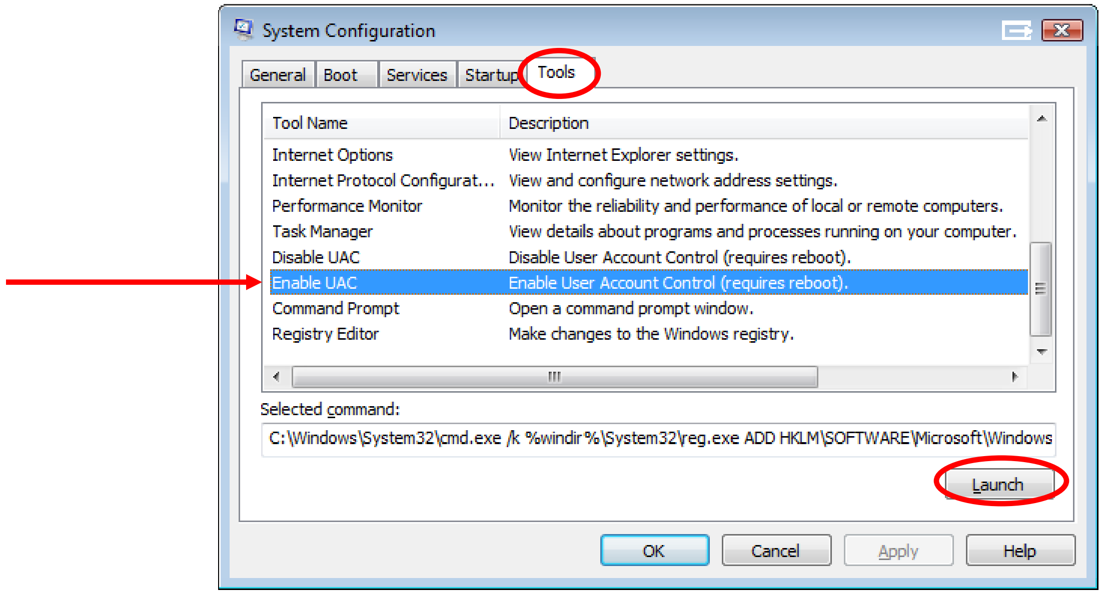
<u>Before you Begin</u>

In order for QuickBooks and eDirectGlass to talk to one another, certain processes during the QuickBooks installation require a Windows administrative feature to be activated. *If you have already installed QuickBooks without this turned on, you can simply make the changes below and re-install.* **Please follow these steps before installing QuickBooks**.

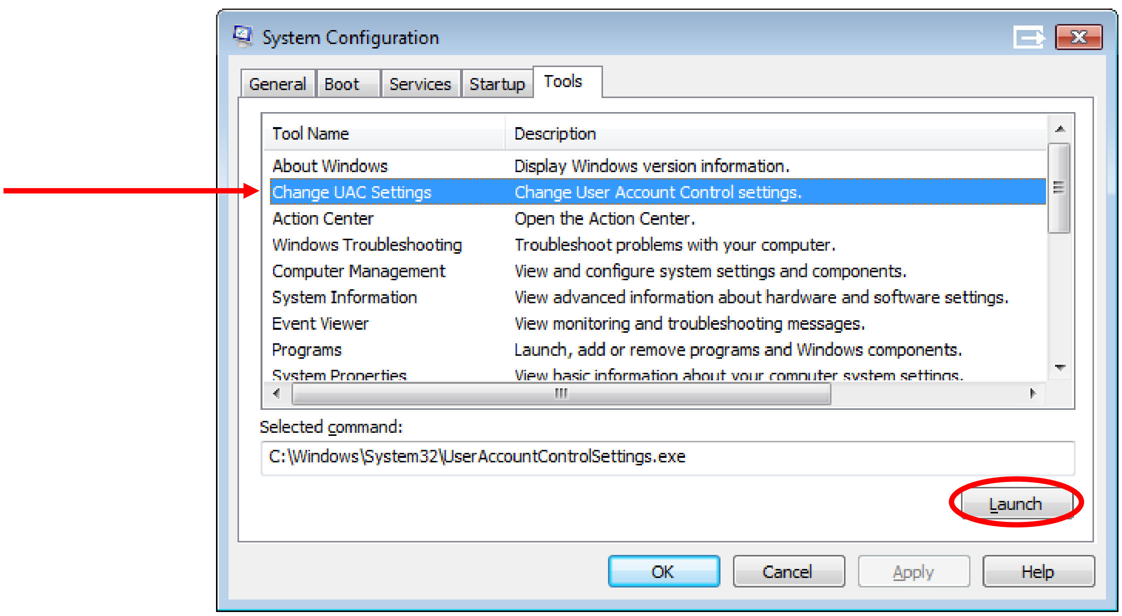
1) Click on Start, Control Panel, Administrative Tools. (*Hint: If you do not see this icon, click on the 'Classic View" to change the view of the panel.*)



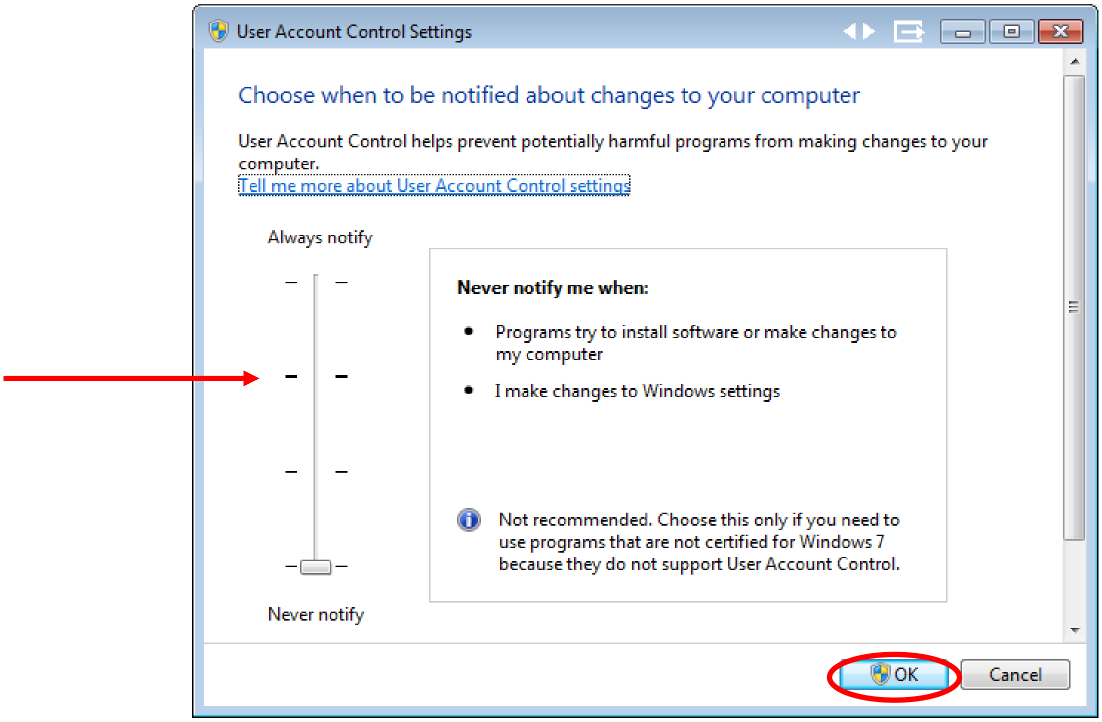
2) In the Administrative Tools folder, open (double-click) the 'System Configuration'.
3) Click on the 'Tools' tab in the 'System Configuration' panel.
4) Scroll down until you see 'Enable UAC' and then click on it to highlight it.
5) Once it is highlighted, click on the 'Launch' button.
6) You will now see another window popup that will execute the command.
7) Once this is complete, click on the 'OK' button in the 'System Configuration' window to close it.
8) You must now reboot your computer for the changes to take effect.



Note: Windows 7 has a different method to Enable and Disable the User Account Control. Here is a screen shot of the Windows 7 Panel:



After you click on the 'Launch' button, move the slider tab to the marking indicated in the image below and then click on the 'OK' button.

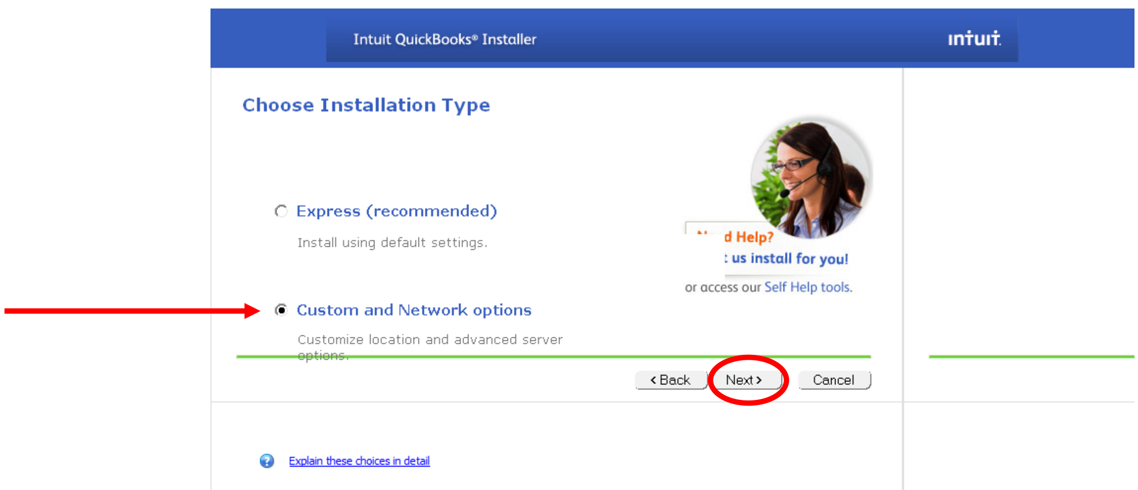

User Account Control Settings
Choose when to be notified about changes to your computer
User Account Control helps prevent potentially harmful programs from making changes to your computer.
Tell me more about User Account Control settings
Always notify
Never notify me when:
Programs try to install software or make changes to my computer
I make changes to Windows settings
Not recommended. Choose this only if you need to use programs that are not certified for Windows 7 because they do not support User Account Control.
Never notify
OK
Cancel

Setting up QuickBooks 2016+ on a 64-bit Computer/OS

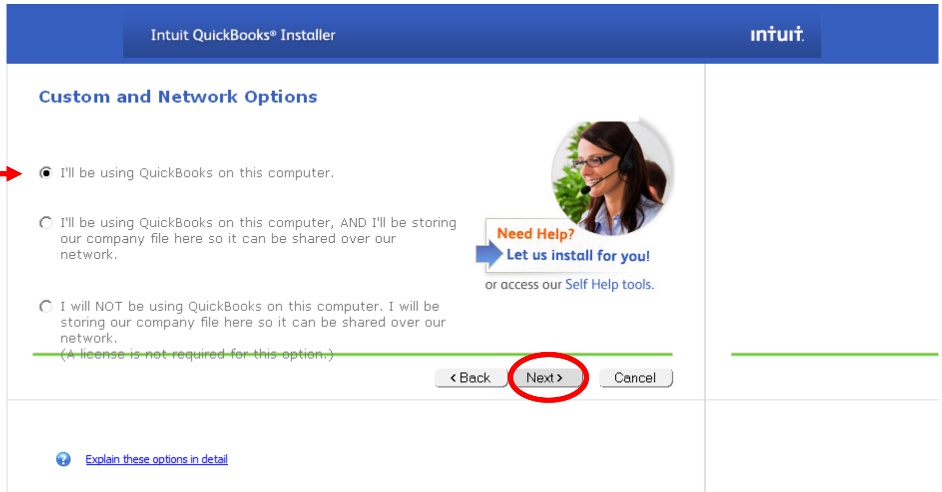
If your computer is a 64-bit machine running a Windows 7, 8, or 10 64-bit version, you must install QuickBooks and the eDirectGlass QuickBooks programs differently than on a 32-bit computer.

Follow these instructions ONLY if you have a 64-bit computer AND a Windows 7, Windows 8.x, or Windows 10.x 64-bit version.

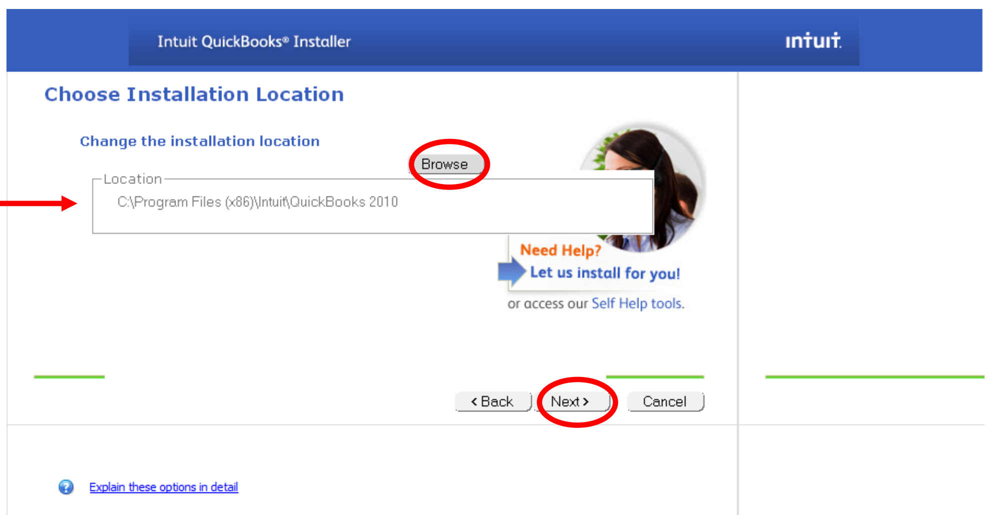
1. When you install QuickBooks 2016+, you must install it to a different directory other than the one recommended by the default installation.
2. To get started, select the ‘Custom and Network options’ followed by clicking on the ‘Next’ button.



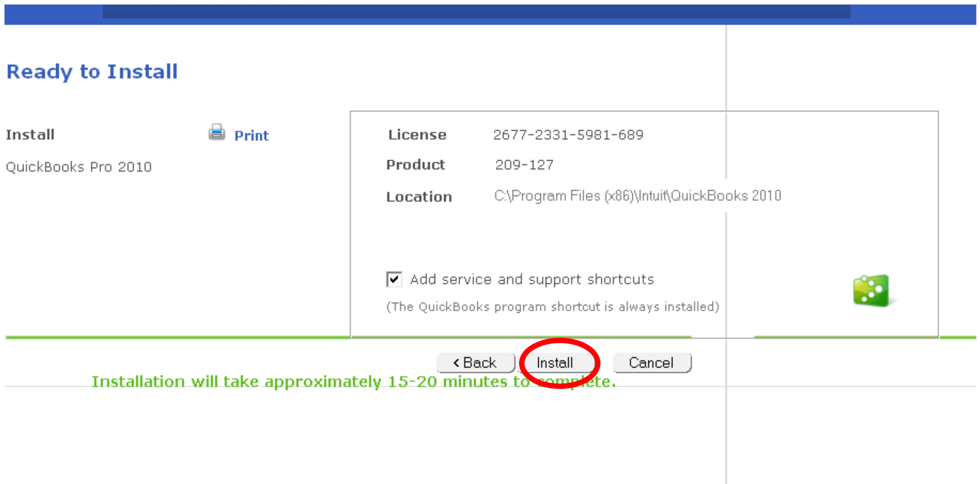
3. On the next screen make sure you select the first option unless you are installing this for a network installation.



4. On the next screen click on the ‘Browse’ button and change the installation location to c:\Program Files (x86)\Intuit\QuickBooks 2016 and then click on the ‘Next’ button. *Note: You may have to manually enter this full path name as the location has not been created for you to look for it on your hard drive.*



5. On the next screen verify your location matches that in step 4 and then click on the ‘Install’ button.



6. After QuickBooks installs, you must setup the eDirectGlass QuickBooks connection.
7. Download eDirectGlassQB2010.zip from http://www.edirectglass.com/downloads/eDirectGlassQB2010.zip
8. Unzip the file and extract the file qbXMLRP2e.exe to a place on your desktop or hard drive. ***Note: You must have QuickBooks open before installing this DLL.***

9. Next copy qbXMLRP2e.exe to C:\Program Files (x86)\Common Files\Intuit\QuickBooks\
10. Click Start, Programs, Accessories, Command Prompt and enter this line at the prompt:

cd C:\Program Files (x86)\Common Files\Intuit\QuickBooks\ then enter this on the next blank line: qbXMLRP2e.exe /RegServer and hit enter. After the DLL installs, you will receive a blank line with no messages.

11. Skip to Step 5 in the next section below to complete your installation of QuickBooks with eDirectGlass.

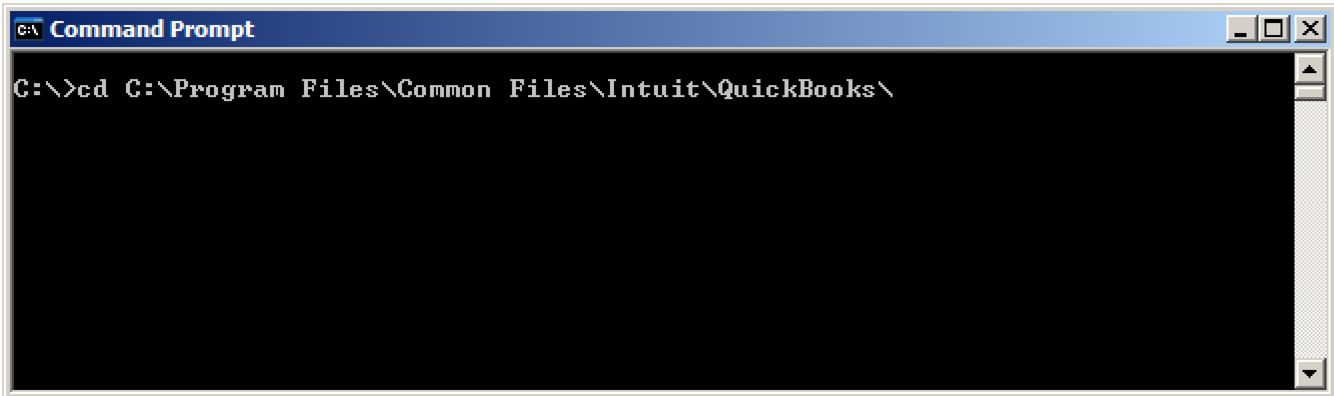
Setting up eDirectGlass QuickBooks 2016+ Link for 32-bit

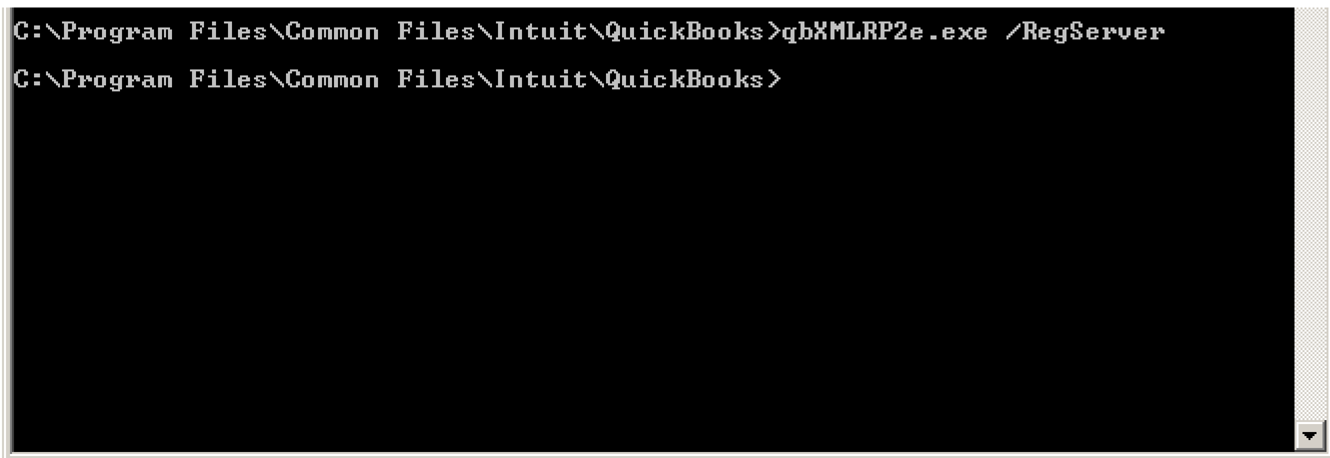
1. Download eDirectGlassQB.zip from http://www.edirectglass.com/downloads/eDirectGlassQB2010.zip

2. Unzip the file and extract the file qbXMLRP2e.exe to a place on your desktop or hard drive.

3. ***Note: You must have QuickBooks open before installing this DLL.*** Next copy qbXMLRP2e.exe to C:\Program Files\Common Files\Intuit\QuickBooks\

4. Click Start, Programs, Accessories, Command Prompt and enter this line at the prompt – cd C:\Program Files\Common Files\Intuit\QuickBooks\ then enter this on the next blank line – qbXMLRP2e.exe /RegServer and hit enter. After the DLL installs, you will receive a blank line with no messages.





5. Please run the following file to fix the Internet Explorer QuickBooks Script Timeout Issue:
   http://www.edirectglass.com/downloads/edgscripttimeout.reg

6. When the next box opens on your screen, click on the 'Run' button.

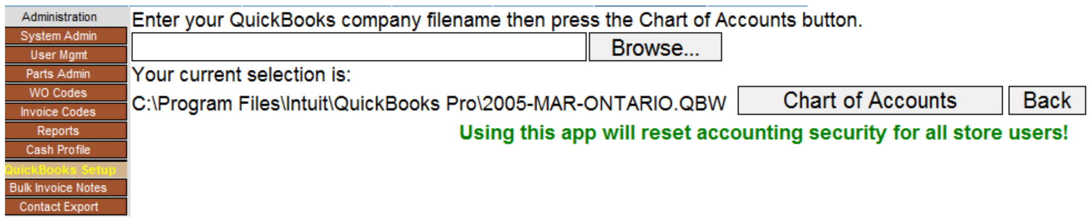
7. When the next box opens on your screen, click on the 'Yes' button.

8. Finally, click on the 'OK' button on the last box.

9. Login to your eDirectGlass account. Remember, QuickBooks ***must*** be open anytime that the user wants to synchronize or work with eDirectGlass and QuickBooks.

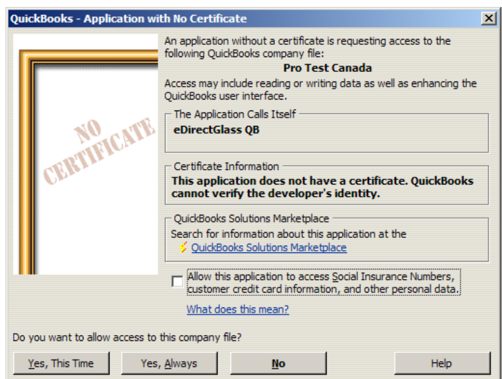
10. Go to Administration, QuickBooks Setup.

11. Click on Browse and locate your QuickBooks company file. Typically this is found in C:\Program Files\Intuit\QuickBooks Pro and the filename should be your company name with a .QBW extension.

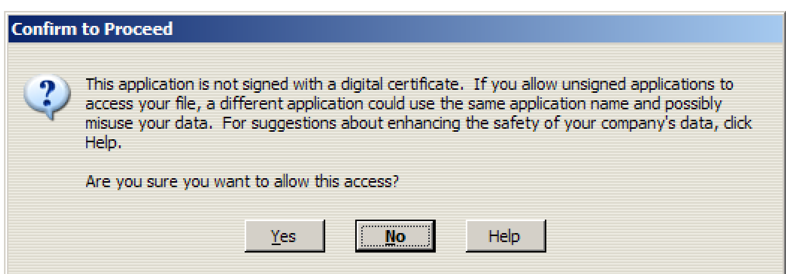


12. Once you have selected your file, click on Chart of Accounts. If you did not set your Internet Explorer security settings properly, you will get an Internet Explorer ActiveX warning box, simply click on Yes.

13. Total Shop Management will talk to your local installation of QuickBooks and may pop-up the follow dialog box in QuickBooks. If the dialogue box does not come up, click on the QuickBooks program on your toolbar:



14. Select “Yes, Always” to allow your Total Shop Management account access to your QuickBooks account.



15. You may also get a digital certificate warning screen. If you do, select “Yes”

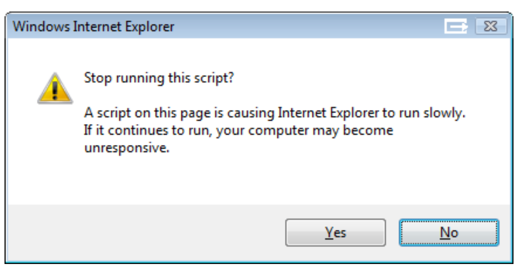
16. Once you have completed this, your chart of accounts will be displayed:

QuickBooks company file: **C:\Program Files\Intuit\QuickBooks Pro\2005-MAR-ONTARIO.QBW**

Select the accounts to use in the QB download. You can use the same account for multiple parts.

Part ID	Revenue GL	COGS GL
AC-MISC	Sales Other:Miscellaneous	
ADMIN	Sales Glass:Admin Fee	
AF-MISC	Sales Accessories:Accessories	Accessories:Accessories
AS1CLEAR	Sales Glass:Flat Glass	Glass:Flat Glass
AS1TINT	Sales Glass:Flat Glass	Glass:Flat Glass
AS2CLEAR	Sales Glass:Flat Glass	Glass:Flat Glass
AS2TINT	Sales Glass:Flat Glass	Glass:Flat Glass
AS-MISC	Sales Accessories:Accessories	Accessories:Accessories
BC-MISC	Sales Accessories:Accessories	Accessories:Accessories
BE-MISC	Sales Accessories:Accessories	Accessories:Accessories
BP-MISC	Sales Accessories:Accessories	Accessories:Accessories
BR-MISC	Sales Accessories:Accessories	Accessories:Accessories
BS-MISC	Sales Accessories:Accessories	Accessories:Accessories
CL-MISC	Sales Accessories:Accessories	Accessories:Accessories
CT-MISC	Sales Accessories:Accessories	Accessories:Accessories
CV-MISC	Sales Accessories:Accessories	Accessories:Accessories
DB-MISC	Sales Glass:Domestic Tempered	Glass:Domestic Tempered
DD-MISC	Sales Glass:Domestic Tempered	Glass:Domestic Tempered
DEALER	Sales Other:Dealer Items	Other:Dealer Items
DEFREP		
DE-MISC	Sales Accessories:Auto Detailing	Accessories:Auto Detailing
DF-MISC	Sales Accessories:Accessories	Accessories:Accessories
DISPOSALFEE		
DK-MISC	Sales Accessories:Accessories	Accessories:Accessories
DL-MISC	Sales Glass:Flat Glass	Glass:Flat Glass
DQ-MISC	Sales Glass:Domestic Tempered	Glass:Domestic Tempered
DR-MISC	Sales Glass:Domestic Tempered	Glass:Domestic Tempered
DS-MISC	Sales Glass:Domestic Tempered	Glass:Domestic Tempered
DT-MISC	Sales Glass:Flat Glass	Glass:Flat Glass

You may get a warning message from Internet Explorer regarding the speed of waiting for the Chart of Accounts. If you do, click 'No'; otherwise, you may cause a setup issue.

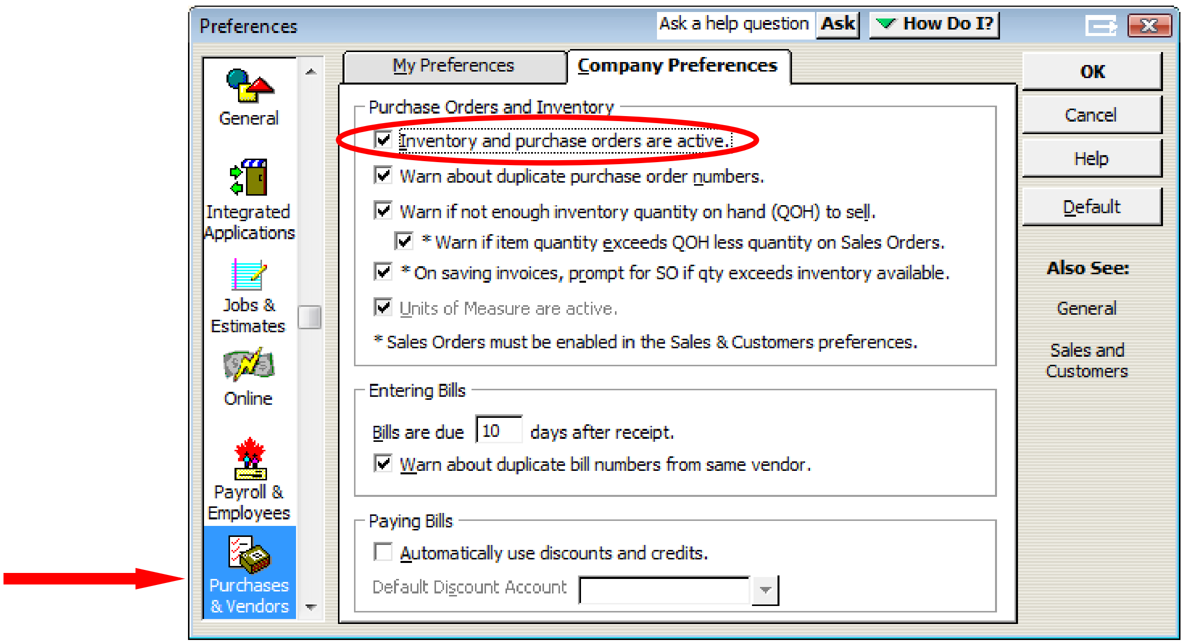


17. Please go through all of our Chart of Account mappings and make sure that every Revenue GL and COGS GL is setup for each PartID, Category, etc. As you make changes, they are saved immediately.

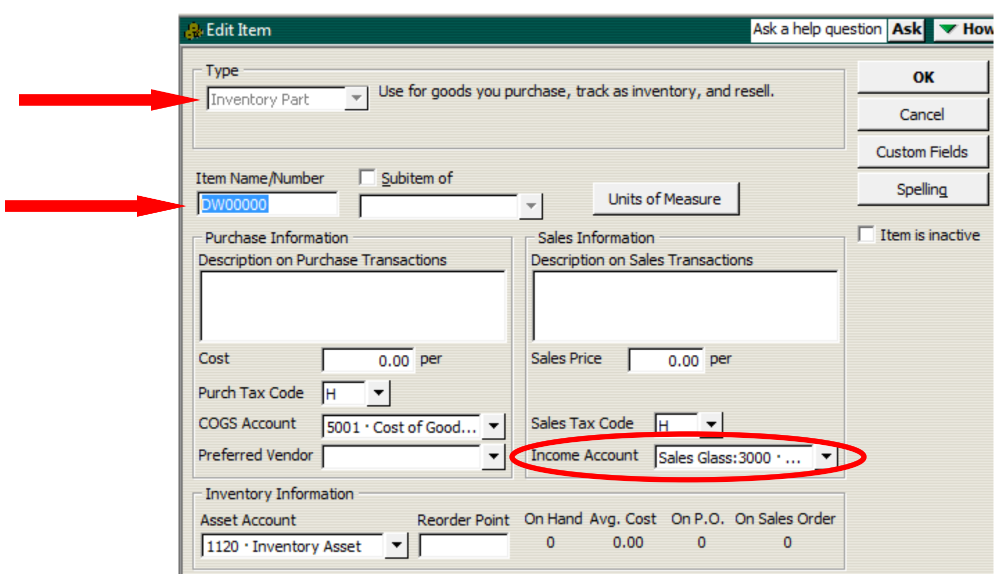
18. Next, you must go in to QuickBooks, with your company file open and make the following changes:

    a. Go to Edit, Preferences and find the Purchases & Vendors icon. Click on this icon.

    b. Next click on the Company Preferences. Make sure that the “Inventory and purchase orders are active” check box is active. Close the Preferences window when you are finished.



19. Now, click on the Item button on the main menu.
20. Click on the Item button at the bottom of the screen and choose New.
21. Choose ‘Inventory Part’ as the Type. Enter DW00000 in the Item Name/Number box.
22. In the ‘Income Account’ box, choose ‘Sales Glass:3000’and click on the OK button.

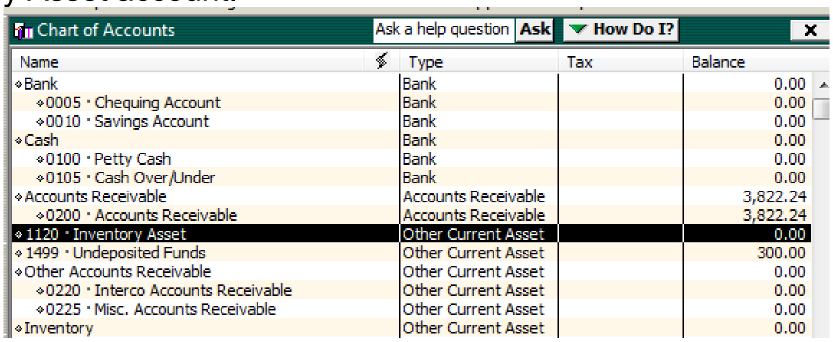


23. Now, click on Lists, and then click on Tax Codes List.

24. Make sure you have the following in your list:
S – Standard (default) which should include State and Local if applicable
E – Exempt (no taxes)

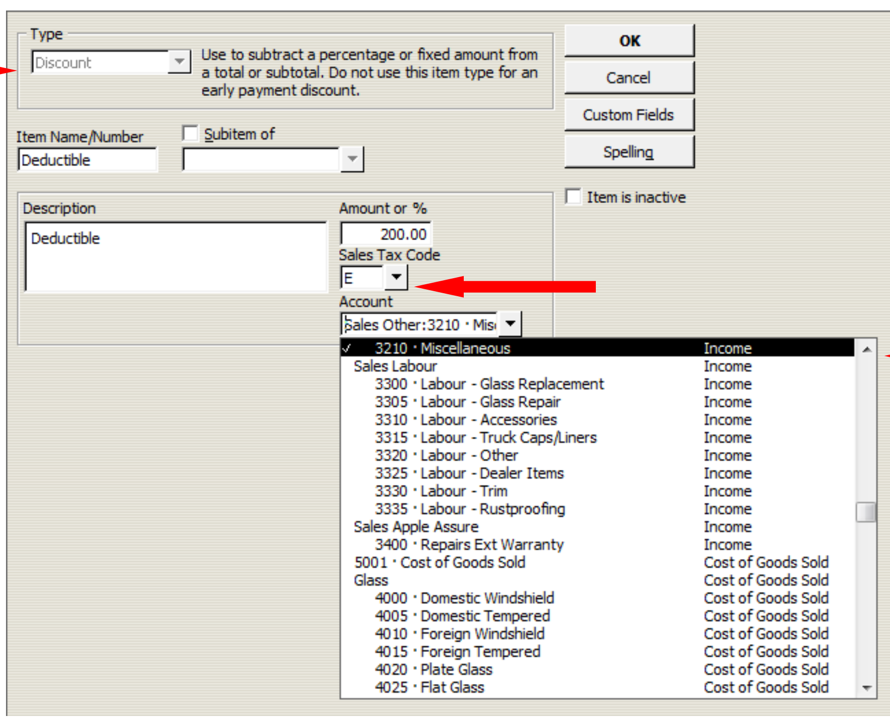
25. Next click on 'Lists' and select 'Chart of Accounts'.

26. In the Chart of Accounts, make sure that Inventory Asset is not in a sub-account. If it is, create a new Inventory Asset account.



27. Next, go back to 'Lists' and select 'Item List' to verify that you have an item called **"Deductible"**.

28. If you do not have this item, add it as a 'New' discount item. You can choose the GL Account as 'Sales Other: Miscellaneous'. Make sure that the 'Sales Tax Code' is set to 'E' for exempt.

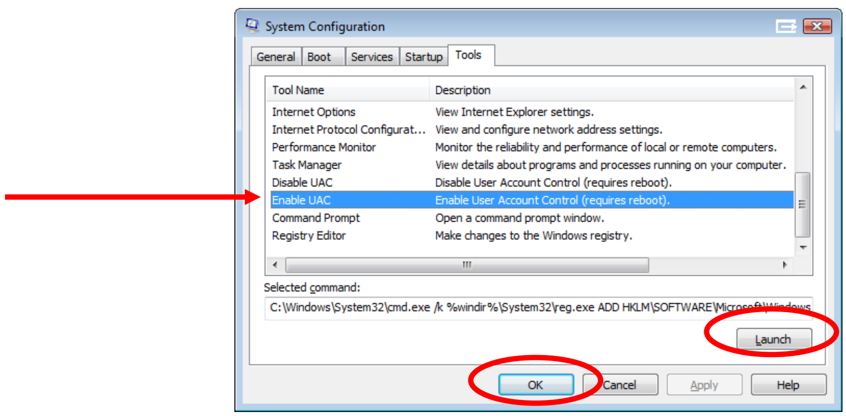


29. You must also make sure that you have the following as ‘Payment Types’ in QuickBooks and if you do not, you must add them: Debit Card, VISA, MasterCard, American Express, Discover and Other.

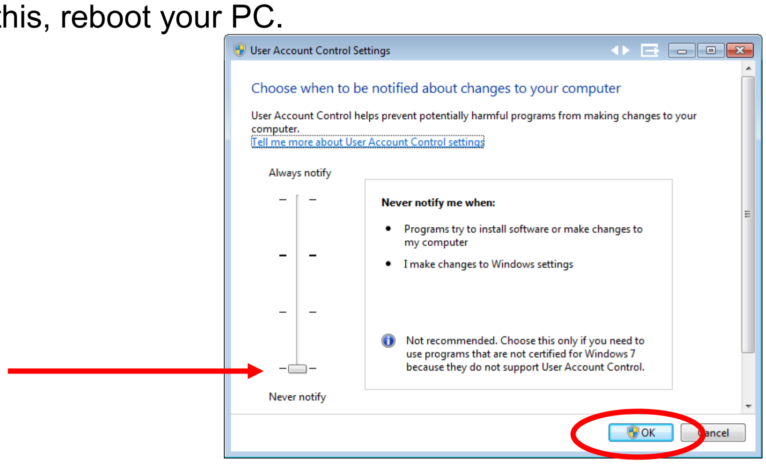
◆American Express		Payment	1499 · Undeposited Fu
◆Debit Card		Payment	1499 · Undeposited Fu
◆Discover		Payment	1499 · Undeposited Fu
◆MasterCard		Payment	1499 · Undeposited Fu
◆Other		Payment	1499 · Undeposited Fu
◆VISA		Payment	1499 · Undeposited Fu

30 . You may now close everything and disable the UAC that you had enabled at the beginning of this guide.

For Windows Vista, follow the instructions at the beginning of this document to launch the System Configuration panel. Once the panel appears on your screen, click on the ‘Disable UAC’ and then click on the ‘Launch’ button. Once you have completed this, click on the ‘OK’ button. You may be prompted that the changes you just made will only take place once you reboot. At this point, close all open programs and save any work. Once you have done this, reboot your PC.



For Windows 7 or above, follow the instructions at the beginning of this document to launch the System Configuration panel and select the ‘Change UAC Settings’ line followed by the ‘Launch’ button. Once the panel appears on your screen, move the slider all the way to the bottom. Once you have completed this, click on the ‘OK’ button. You may be prompted that the changes you just made will only take place once you reboot. At this point, close all open programs and save any work. Once you have done this, reboot your PC.



Appendix E – Chrome and Firefox Usage

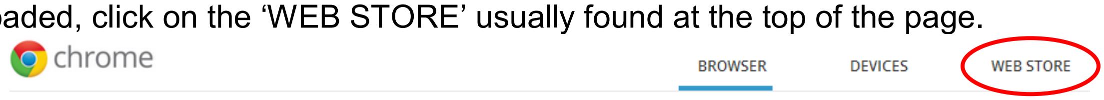
Overview

eDirectGlass is designed to only work with Microsoft Internet Explorer; however, through the use of 3rd party plug-ins for the Chrome and Firefox browsers on a Windows PC, you may use these browsers to access your eDirectGlass account.

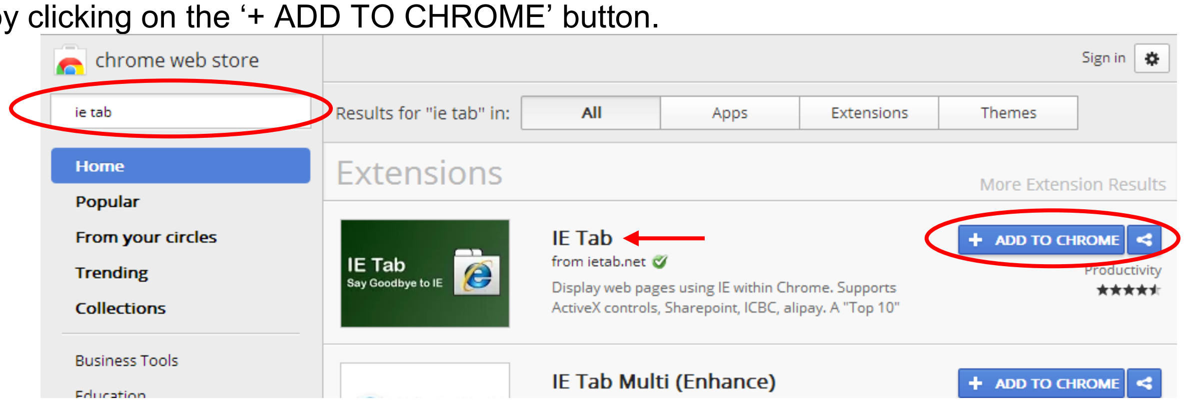
Please note: While eDirectGlass is providing this documentation, *we do not officially support nor can we guarantee that it will perform in the same manner as Internet Explorer would*. eDirectGlass has tested the following plug-ins with the most current version of each browser as of August 1, 2013. It is possible that future versions of either the browser or plug-in may cause eDirectGlass to not function properly therefore we do not warranty or support these browsers. **USE AT YOUR OWN RISK**.

Chrome - Getting Started

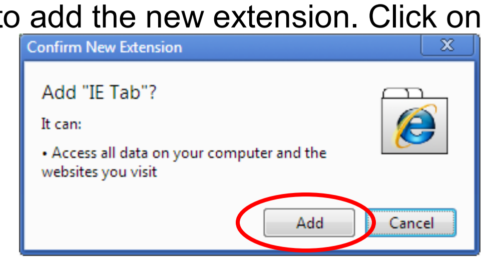
1) After you have launched Chrome, go to http://chrome.google.com and once the landing page has loaded, click on the 'WEB STORE' usually found at the top of the page.



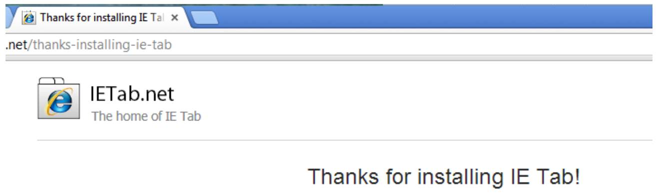
2) When you click on the 'WEB STORE' select 'Extensions' followed by clicking on the 'Find Extensions' button that will appear on the screen.
3) In the chrome web store screen, there will be a search panel. In the search area, type 'ie tab' and a list of 'Extensions' will be displayed. Select the 'Extension' labled IE Tab from ietab.net by clicking on the '+ ADD TO CHROME' button.



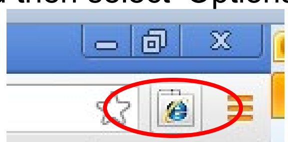
4) After you have clicked on the '+ ADD TO CHROME' button, a prompt will come up on your screen asking if you want to add the new extension. Click on the 'Add' button to continue.



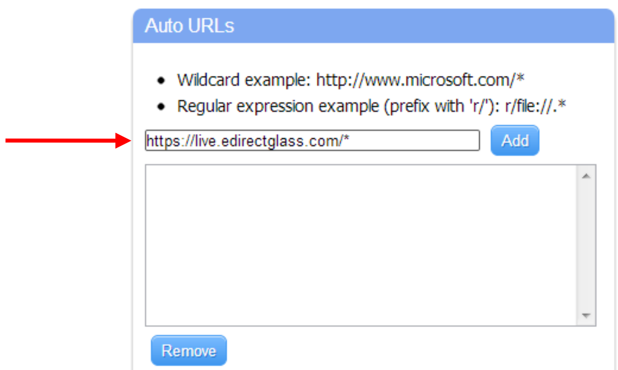
5) After you have clicked on the ‘Add’ button, Chrome will install the extension and in a minute or two, you will see a screen that confirms the installation of the extension.



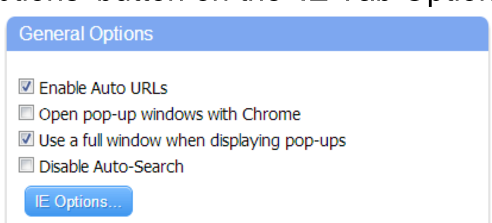
6) In your Chrome address bar, you will see a new icon that has the Internet Explorer icon on it. Right mouse-click on this icon and then select ‘Options’.



7) In the ‘IE Tab Options’ screen, enter https://live.edirectglass.com/* in ‘Auto URLs’ Add area and then click on the ‘Add’ button. ***NOTE****: If you are an Enterprise customer, IGA member or you have your own eDirectGlass portal, please enter the portal address you use to log in to your eDirectGlass account and make sure you put the /* at the end of the url. For example; http://iga.edirectglass.com/**



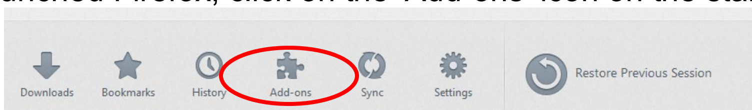
8) Before you can use Chrome to access your eDirectGlass account, you must enter the Internet Explorer settings as found in the eDirectGlass or TSM Quick Start Guide in Internet Explorer or you may click on the ‘IE Options’ button on the ‘IE Tab Options’ screen and enter them there.



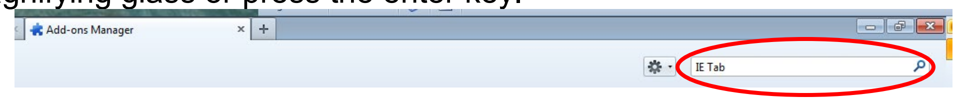
9) Once you have completed the eDirectGlass Internet Explorer settings, you may now use Chrome to access your eDirectGlass account.

Mozilla Firefox - Getting Started

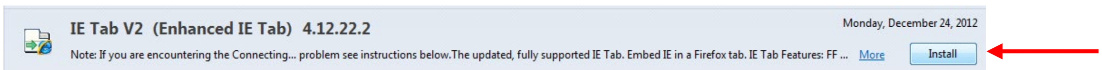
1) After you have launched Firefox, click on the ‘Add-ons’ icon on the start page.



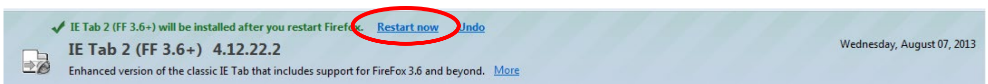
2) On the ‘Add-ons Manager’ window, enter ‘IE Tab’ in the ‘Search all add-ons’ box and then click on the magnifying glass or press the enter key.



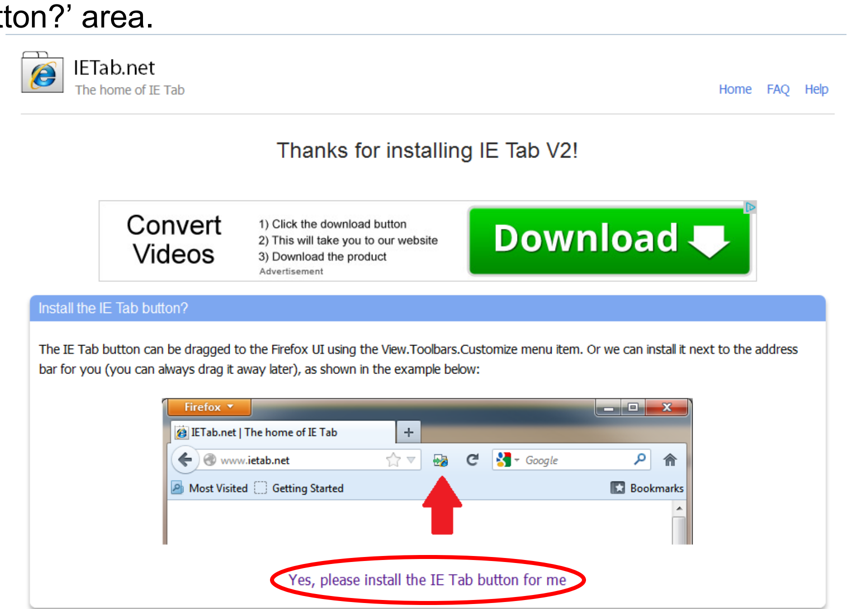
3) On the ‘Available Add-ons’ result page, there will be a listing called ‘IE TAB V2 (Enhanced IE TAB) 4.12.22.2. Click on the ‘Install’ button that is associated with this add-on.



4) After you click on the ‘Install’ button, Firefox will download the add-on and when completed, the add-on will say it will be installed after you restart Firefox. Click on ‘Restart now’ to restart Firefox.



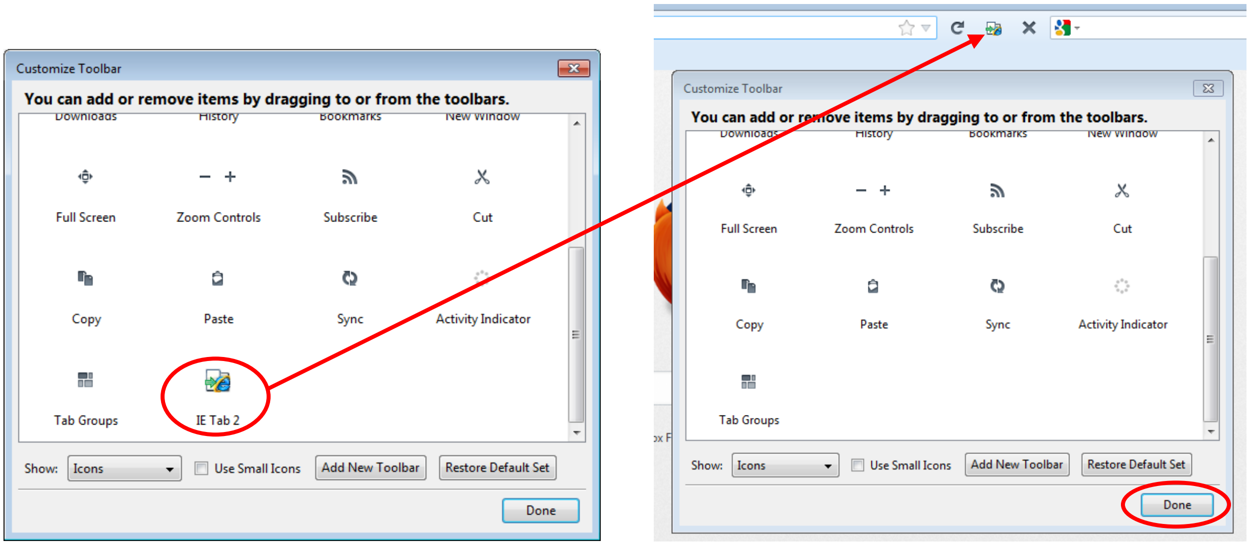
5) Firefox will restart and then you should see a screen confirming the installation of IE Tab V2. On this screen, click on the ‘Yes, please install the IE Tab button for me’ located in the ‘Install the IE Tab button?’ area.



***NOTE**: It has been reported that some installation instances of the IE Tab V2 add-on in Firefox do not give the option to install the IE Tab button. If this happens to you, please do the following:

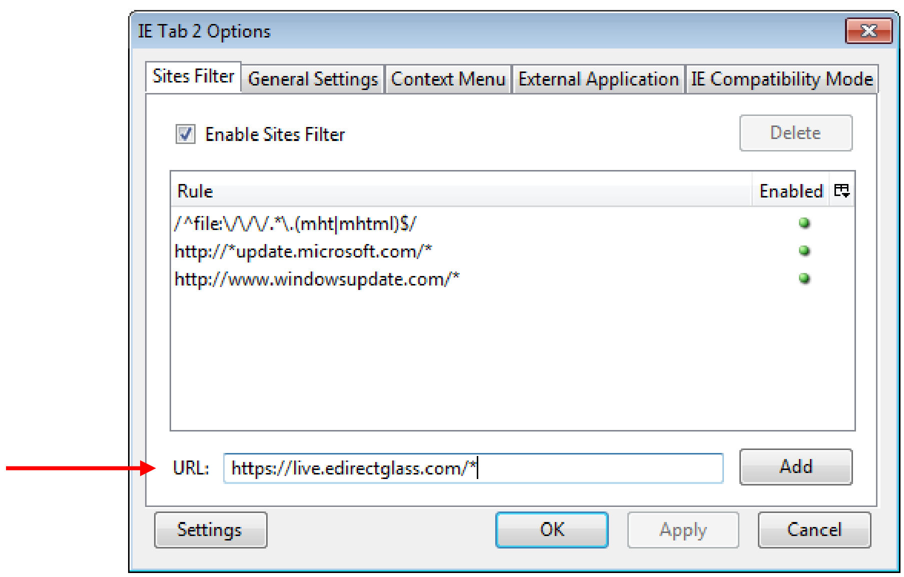
a) Right mouse click on the address bar in between the start page icon and bookmarks icon and click on the item labeled ‘Customized’.

b) Scroll down until you see the IE Tab 2 icon and drag it to the address bar right behind the refresh icon.



c) Click on the 'Done' button in the Cutomize Toolbar screen.

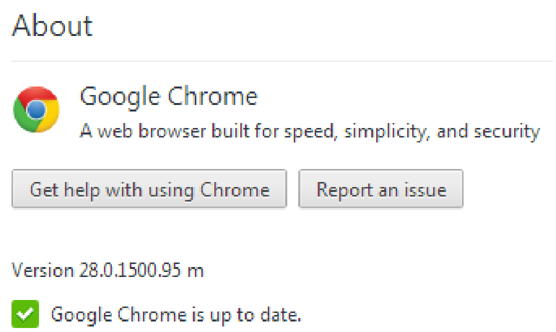
6) Once the IE Tab button is installed on the address bar, right mouse-click on the IE Tab button.
7) On the 'Sites Filter' window, enter https://live.edirectglass.com/* in ' URL' box and then click on the 'Add' button. ***NOTE**: If you are an Enterprise customer, IGA member or you have your own eDirectGlass portal, please enter the portal address you use to log in to your eDirectGlass account and make sure you put the /* at the end of the url. For example; http://iga.edirectglass.com/**



8) Click on the 'OK' button to close the IE Tab 2 Options window.
9) Before you can use Firefox to access your eDirectGlass account, you must enter the Internet Explorer settings as found in the eDirectGlass or TSM Quick Start Guide in Internet Explorer.

10) Once you have completed the eDirectGlass Internet Explorer settings, you may now use Firefox to access your eDirectGlass account.

As of August 1, 2013, the following PC versions of Chrome and Firefox where tested and working with eDirectGlass per the instructions in this document. eDirectGlass **DOES NOT** work on the Apple OS platform on any browser unless you install Windows in Boot Camp or Parallels mode.

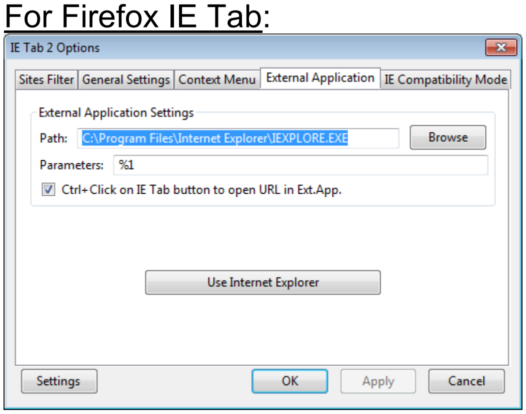


Know Issues

Crystal Reports Does Not Work: It is possible that you have not installed the Crystal plug-in by first printing a Quote, Work Order or Invoice in Internet Explorer. The IE Tab add-on may also be using the 64-bit version of Internet Explorer and Crystal Reports is not 64-bit compatible. You must change the version IE Tab uses by changing the patch for Internet Explorer in IE Tab to the 32-bit version.

For Chrome IE Tab:
You must make the change in your Windows setup by following these instructions:
a. Click on Start and go to **Default Programs**.
b. Click on **Associate a file type or protocol always open in a specific program**.
c. Browse to all the extensions where internet explorer is set as default and then click on **change.**
d. Now Click on browse and then go to location **C:\Program Files (x86)\Internet Explorer\iexplore.exe** and select it.
e. Click Ok and then Close.
f. Click Save.

For Firefox IE Tab:



Appendix F – MyGlassClaim Setup and Usage

Overview

When automotive glass repair and replacement companies acquire a customer via the telephone, they have no way to obtain the customers 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.

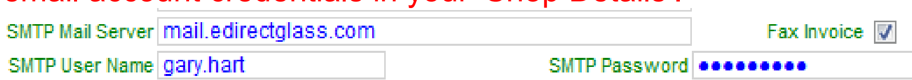
In addition, by including the customer in the process of reviewing their scheduled job and agreeing to the shops terms and conditions, the shop will retain more control over their customer and the processes ahead of them.

Getting Started

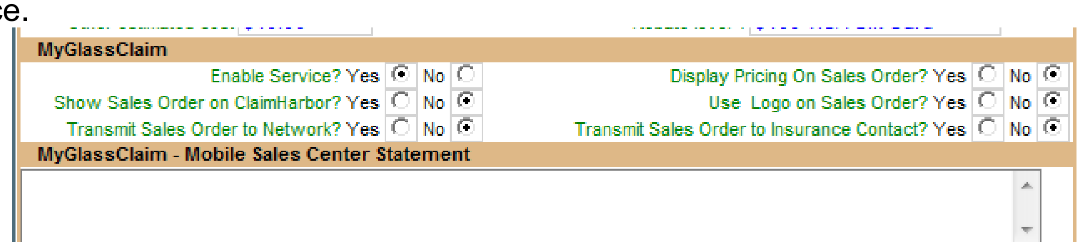
Before you can use MyGlassClaim, you must first setup the parameters required to make this service work in your eDirectGlass account.

1) Go to the Administration tab, followed by clicking on the System Admin button.
2) In the Shop Detail panel, scroll down to the section labeled MyGlassClaim.

3) By default, the service is not enabled so to turn it on, simply click on the ‘Yes’ radio box. **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 box, the section will expand to show a set of features for the service.



5) If you want to show pricing on the Sales Order that will be sent to the customer, insurance company, and/or the third-party administrator (aka Belron, Uniban, etc.), select the ‘Yes’ radio box.
6) If you want to make the signed Sales Order available for view by the customer, insurance company, and/or the third-party administrator on ClaimHarbor (www.claimharbor.com), select the ‘Yes’ radio box.

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 box.
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 box.
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 box.
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.

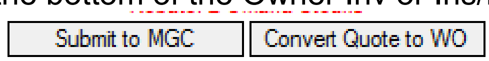
CONTRACT FOR SERVICE, ASSIGNMENT OF PROCEEDS AND AUTHORIZATION TO PAY: I have selected (YOUR COMPANY NAME) for the replacement or repair of the glass in my automobile. I assign any and all insurance claims and all policy proceeds owed by my insurance company in connection with my damaged glass to (YOUR 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

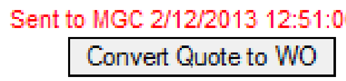
The MyGlassClaim service only will work during the Quote or Work Order phase. Depending on how your shop wants to handle the process, most shops will use the service in the Work Order phase, after the job has been scheduled. While this is the recommended method, you can use the service as your operations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

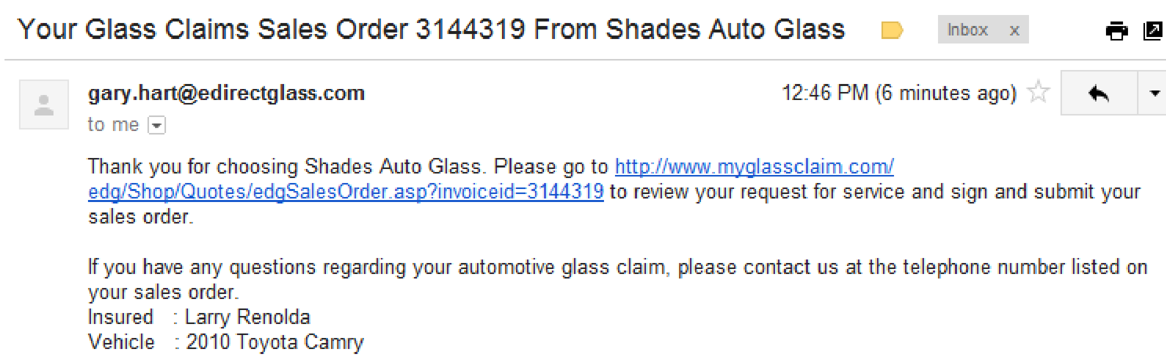


You can only click on the ‘Submit to MGC’ button once so make sure you are doing it at the right time in your process with the customer.

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.



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 and sign it. **NOTE**: If you must make corrections, the customer only has to reload the page or click on 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 touch device.

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

Sign and Submit Your Signature

Submit

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 and also place it in the Attachments folder of their claim record in the eDirectGlass system.

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

Your Glass Claims Sales Order 3144319 From Shades Auto Glass

Inbox x

gary.hart@edirectglass.com 1:15 PM (4 minutes ago)

to me

Thank you for choosing Shades Auto Glass. Attached, please find a copy of your Sales Order number 3144319 for your review.

If you have any questions regarding your automotive glass claim, please contact us at the telephone number listed on your sales order.

Claim Nr :
Insured : Larry Renolda
Vehicle : 2010 Toyota Camry
Amount due: $0

SalesOrder3144319Owner.pdf
13K View Download

Email to Customer Example

Attachments for Job #3144319

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

Signed Sales Order Attachment in eDirectGlass Glass Record Example

eDirectGlass

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.

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.

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

Depending on your situation (network agreement, etc.), you may still be required 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 (aka Belron, Uniban, etc.), simply inform them that your company has already made available the executed sales order with the customer with 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.

Appendix G – eMinder Setup and Usage

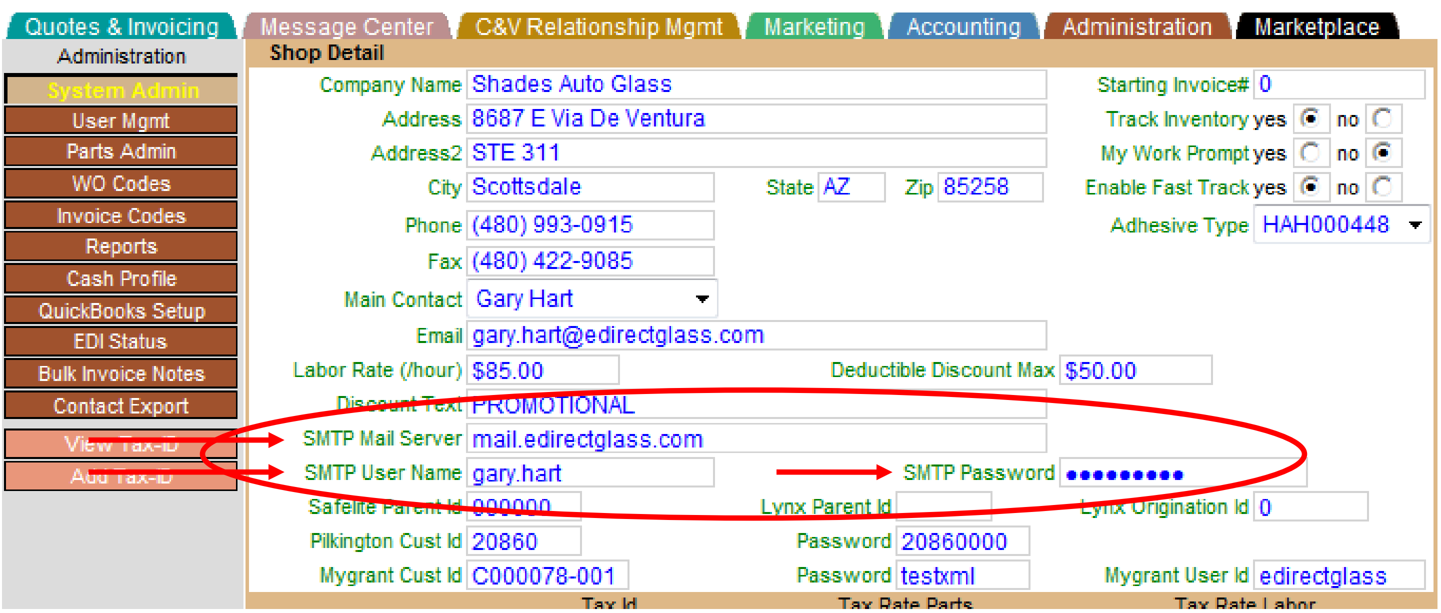
eMinder is an email appointment reminder add-on for all versions of eDirectGlass TSM. Once you have setup and enabled eMinder, all work orders that have a valid email address on the owner panel will be processed and an email will be dispatched with your appointment reminder.

Setting up eMinder

Before you can take advantage of the eMinder add-on, you must first complete the one time setup as described below.

1) Go to Administration->System Admin
2) In this panel, you must enter a valid SMTP Mail Server, SMTP User Name and SMTP Password.

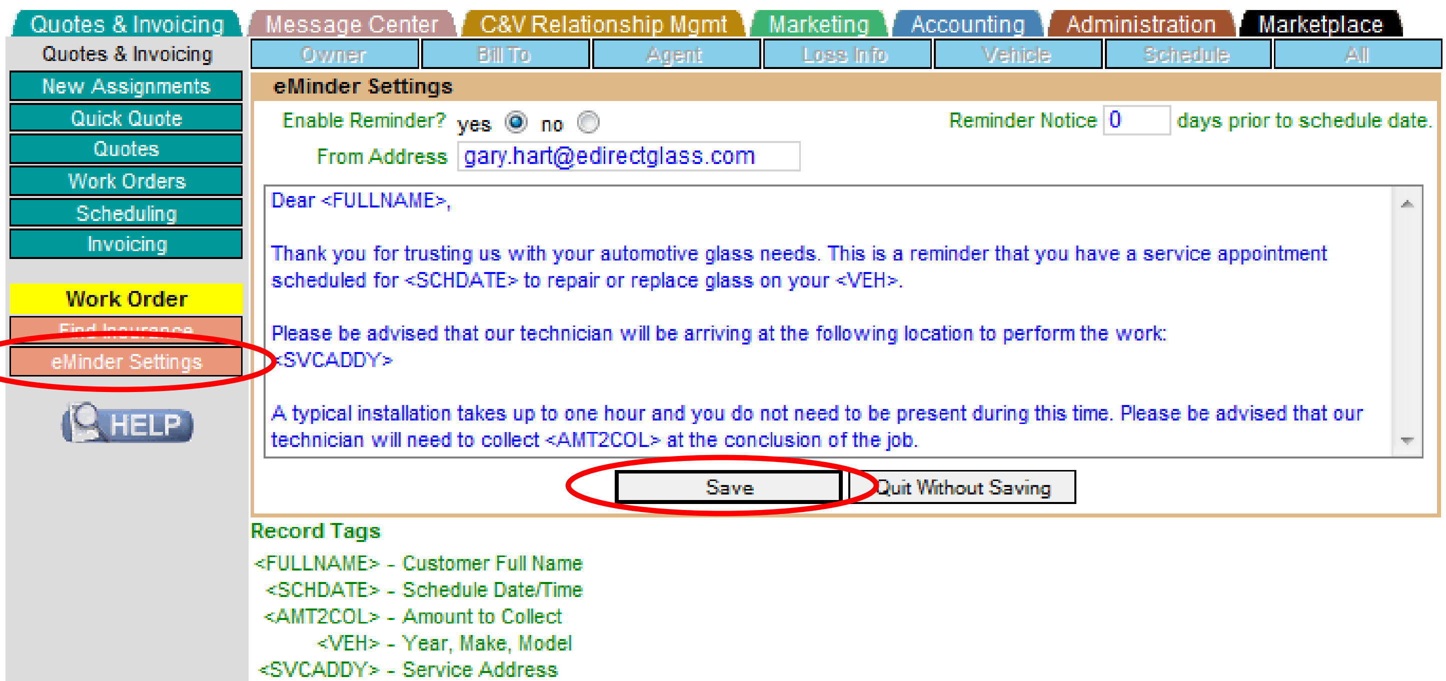
***Please Note*: Certain email services such as Gmail, AOL, Hotmail/LIVE/Outlook, Yahoo or any SMTP server requiring a secure SMTP connection, ARE NOT COMPATIBLE. If you require a secure SMTP connection and cannot locate a non-secure method to dispatch email, you can upgrade your eMinder add-on for an additional monthly fee.**



3) Once you have entered the required information, click on the 'Save' button.
4) Click on the 'Quotes & Invoicing' tab->Work Orders->eMinder Settings.
5) 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.
6) 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 sent out without regard to the schedule date.

7) 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 address will serve as the “bounce back” address should delivery of an appointment reminder fail.***

8) 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.

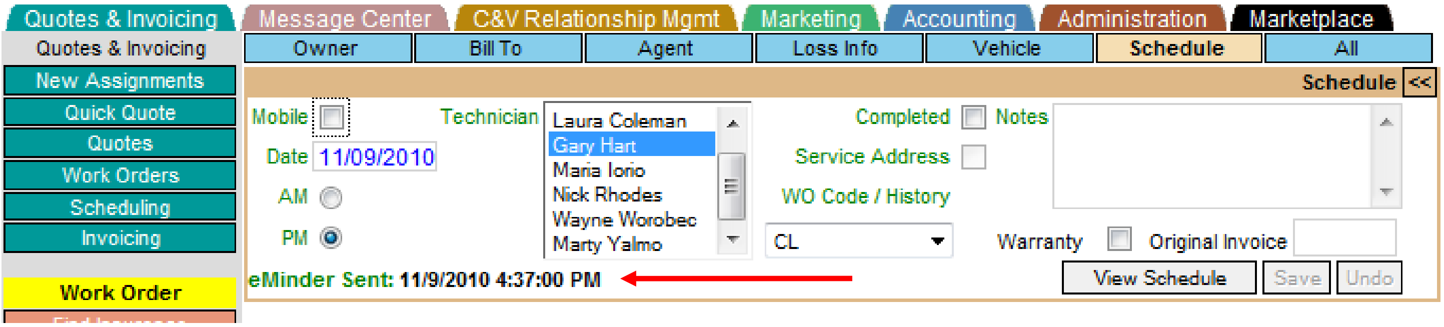


9) Once you have made any changes to this panel, click on the ‘Save’ button.

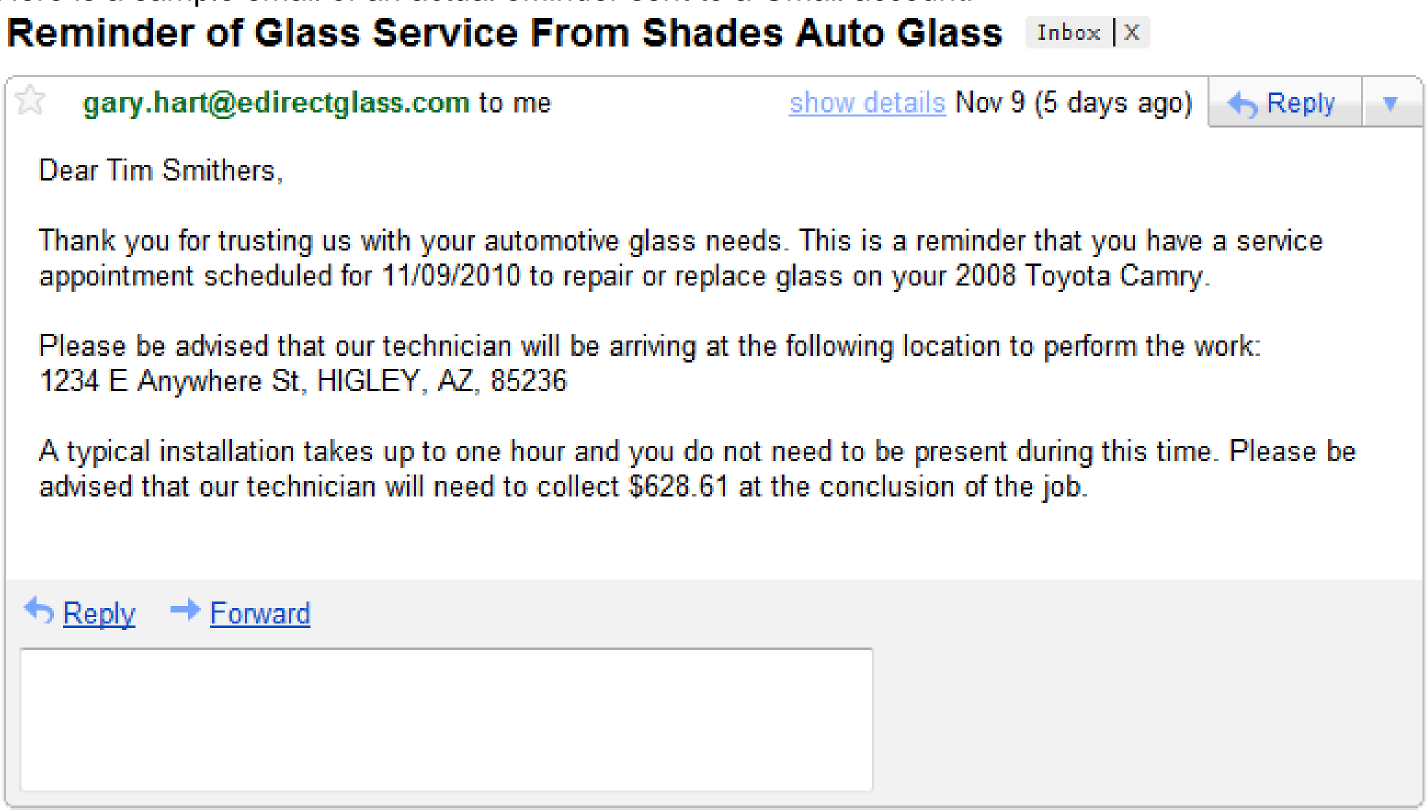
10) The eMinder service will automatically begin to process any applicable reminders based on your setup. You do not have to do anything else to begin to use eMinder.

eMinder 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.***



If there is no ‘Service Address’ provided in the work order, the system will use the address information found on the ‘Owner’ tab/panel.
Here is a sample email of an actual eMinder sent to a Gmail account:



Appendix H – Pricing Catalogue and Profile Setup and Usage

Creating a Catalogue

Before you upload a pricing file to a ‘Catalogue’, you must first create a ‘Catalogue’ in your eDirectGlass account.

1) Go to Administration->Parts Admin->Catalogues.
2) Click on the ‘Add Catalogue’ button.
3) In the ‘Catalogue Name’ box, enter the name for the ‘Catalogue’ you wish to create. In our example, we are going to create a ‘Catalogue’ called Pilkington.
4) When you have finished entering the ‘Catalogue’ name, click on the ‘Save’ button.

Once you have created the new ‘Catalogue’, you may now move on to the next step which is uploading a pricing file to your new ‘Catalogue’.

Uploading Pricing File to a Catalogue

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(s). 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 to you will most likely not be formatted properly. For example, here is a view of a file that Pilkington has provided.

	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				

Sheet1

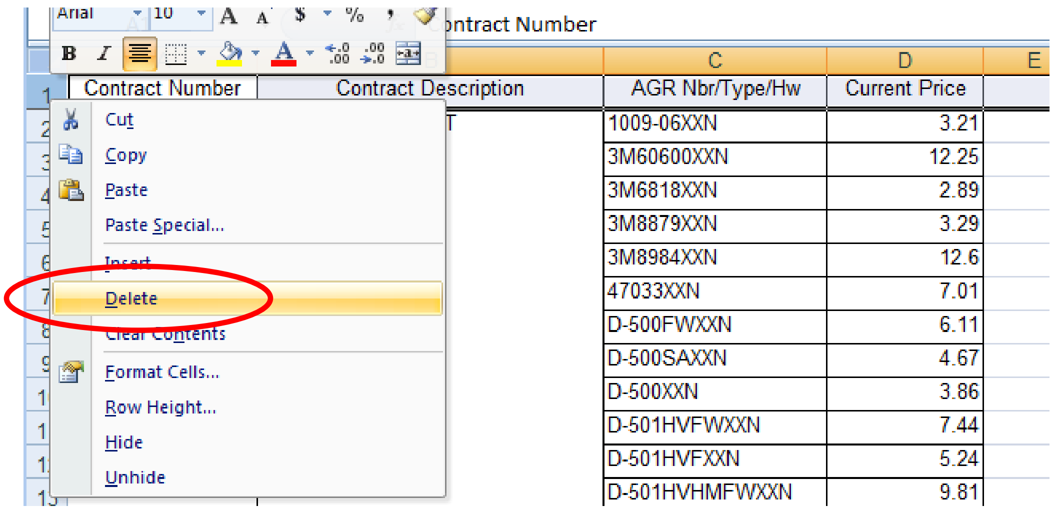
In order to import successfully in to eDirectGlass, you must modify the Excel file first. Please note, you must have Microsoft Excel in order to accomplish this step. If you do not have Microsoft Excel, please contact eDirectGlass technical support for further instructions.

To modify the Excel file, please follow these steps:

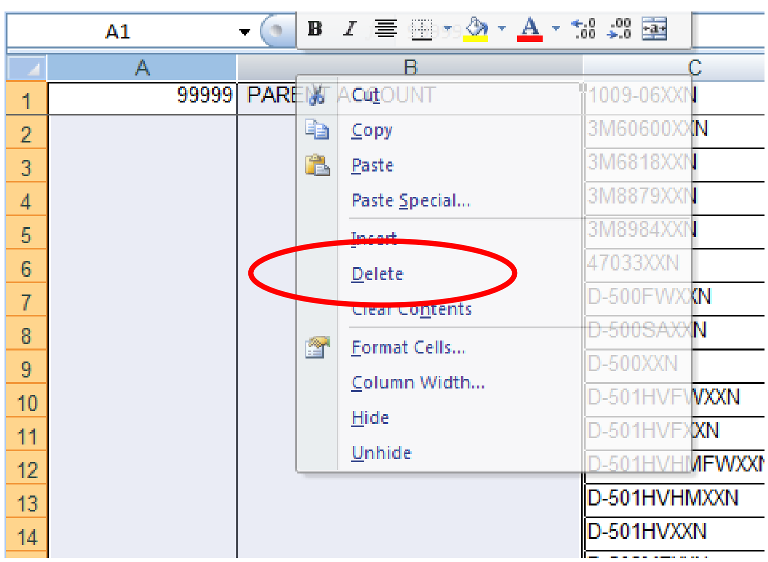
1) Open the pricing file in Microsoft Excel.
2) If the first 'Row' contains a header, which are words in each column to identify what the column is, you must delete the row.

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

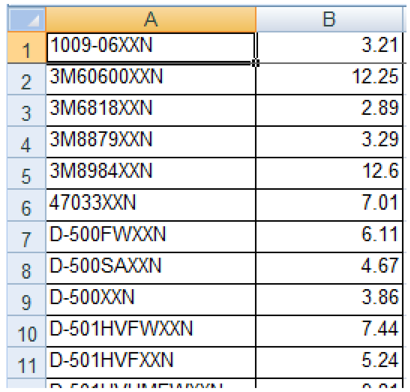
3) To delete the row, simply highlight the row and then right mouse-click and select ‘Delete’.



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:
   a. The first column should be only part numbers,
   b. The second column should be only prices.

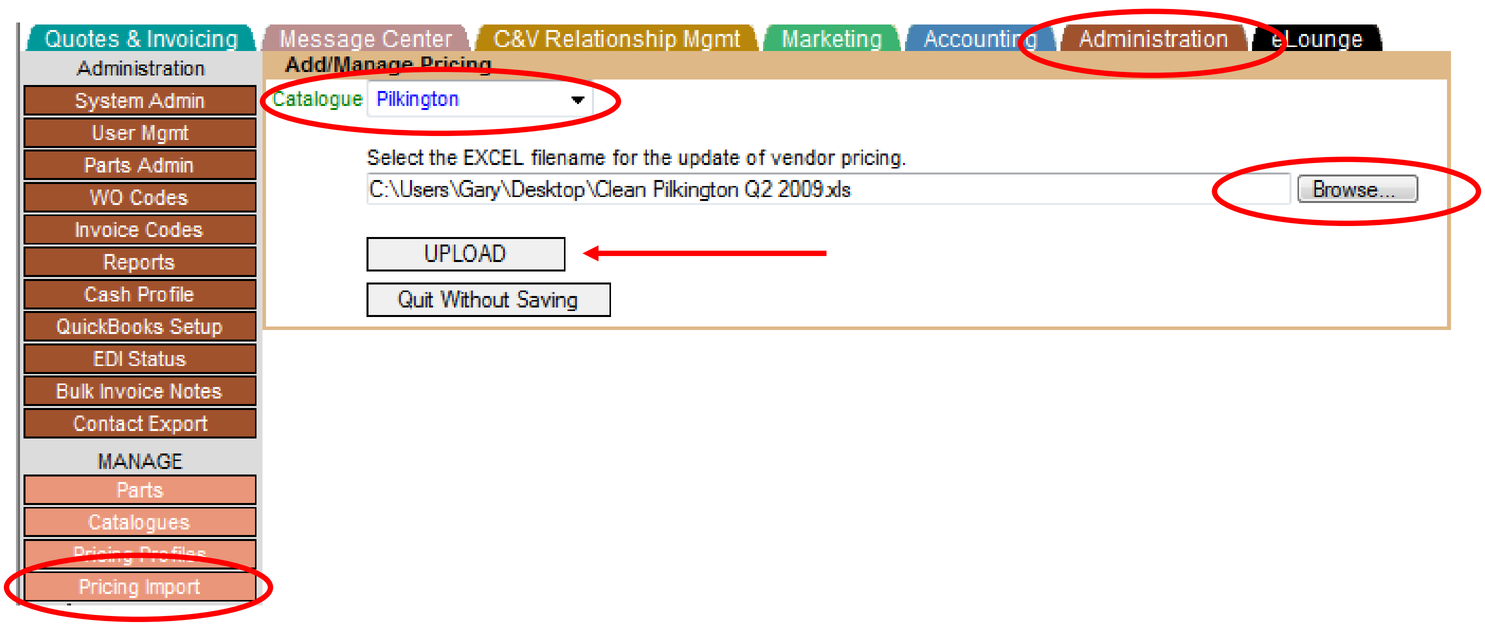


	A	B
1	1009-06XXN	3.21
2	3M60600XXN	12.25
3	3M6818XXN	2.89
4	3M8879XXN	3.29
5	3M8984XXN	12.6
6	47033XXN	7.01
7	D-500FWXXN	6.11
8	D-500SAXXN	4.67
9	D-500XXN	3.86
10	D-501HVFWXXN	7.44
11	D-501HVFXXN	5.24

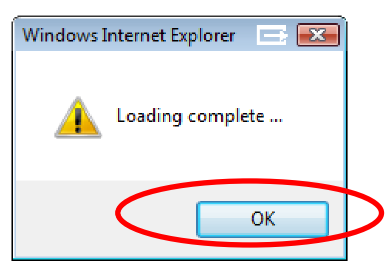
7) You must now save this Excel file. You may wish to give it a new file name so you can preserve the original file that was delivered to you from your supplier.

Uploading your pricing file

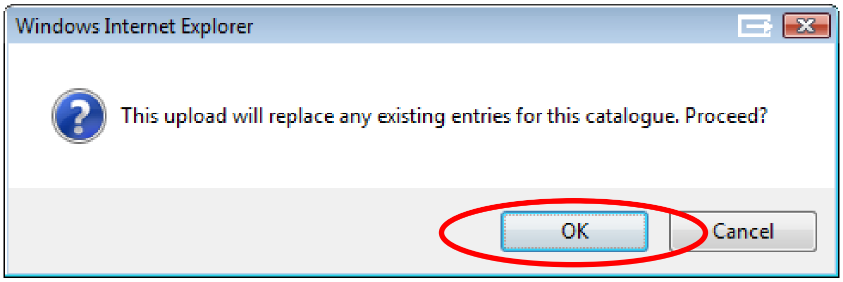
1) In eDirectGlass, go to Administration->Parts Admin->Pricing Import.
2) Select the 'Catalogue' from the drop-down that you wish to upload the pricing to.
3) Now, click on the 'Browse' button and locate the pricing file you modified in the previous step and once you select the file, click on the 'Open' 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.



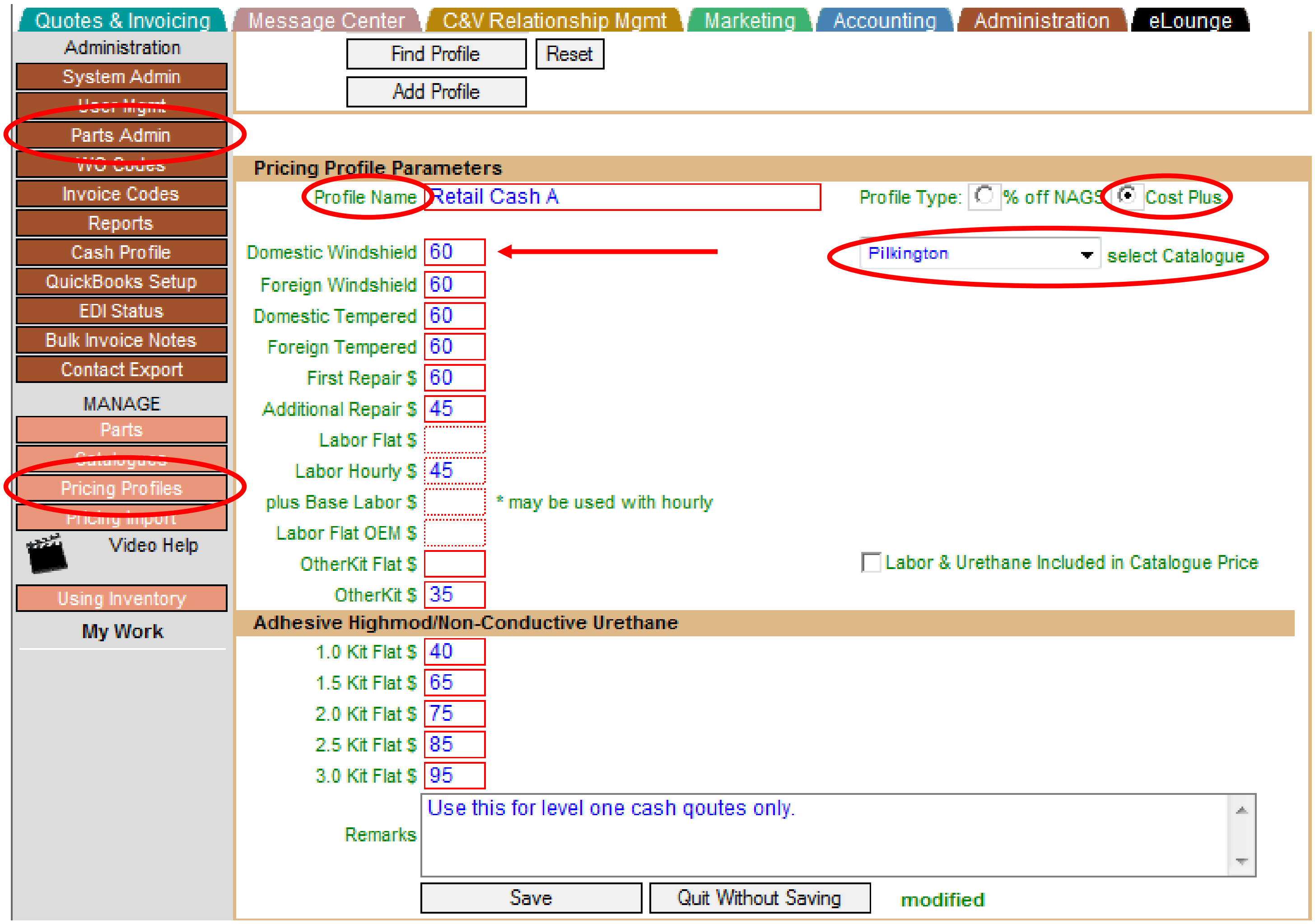
NOTE: If you are updating a 'Catalogue' with a new pricing profile, you will receive a pop-up box asking if you wish to overwrite the data already in the 'Catalogue'. If you answer yes, it <u>will delete</u> all of the data in that 'Catalogue' and replace it with the data in the pricing file you are attempting to upload.



Creating a Cost Plus Pricing Profile

Before create a Cost Plus Pricing Profile, you must have created a pricing 'Catalogue' and uploaded a pricing file from your supplier to that 'Catalogue.

1) To create a Cost Plus Pricing Profile, click on Administration->Parts Admin->Pricing Profiles.
2) On the Pricing Profile Management screen, click on the 'Add Profile' button.
3) In the 'Profile Name' box, put in a 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 next to 'Cost Plus'.
5) Now select the 'Catalogue' you wish to use for this Pricing Profile.
6) Next, input a percentage in the Domestic and Foreign boxes. This percentage will used in conjunction with your uploaded cost to calculate the part price.
7) For the remaining boxes (i.e. First Repair, etc.) you may enter dollar amounts.
8) If you wish to include Labor and the Kit in the price, select the check box next to 'Labor & Urethane Included in Catalogue Price'.
9) You may enter notes about this pricing profile in the 'Remarks' box.
10) When you are finished, click on the 'Save' button.



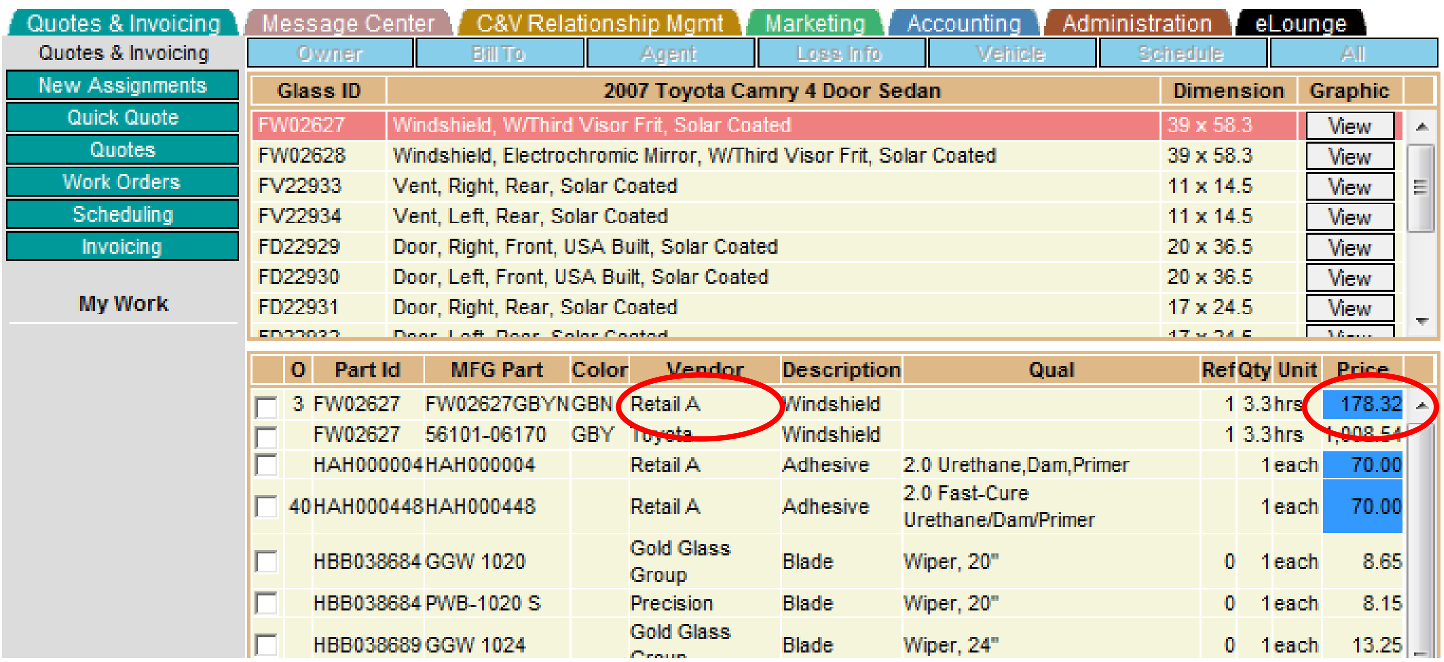
Using Cost Plus Pricing Profiles

At any time in the Quick Quote, Quote, Work Order or Invoice opening parts selection, you may choose any of your pricing Catalogues and Pricing Profiles to apply to the parts selection screen.

For example, here is a Quick Quote using the ‘Pricing Profile’ we created in this document:

1) From Quotes&Invoicing->Quick Quotes, we select a vehicle and click on ‘Show Parts’.
2) In the ‘Select Catalogue’ drop-down, we select our Pilkington catalogue for example.
3) In the drop-down box next to the ‘Catalogue’ name, you will see your pricing profile(s). Select the pricing profile you wish to use.
4) Now click on a ‘Glass Id’ part in the opening parts selection area.

5) When the sub-parts list is displayed, any parts that are found in your pricing 'Catalogue' 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.



6) You may now select the parts you need and add them to a Quote or your Invoice.

Appendix I – Customer Satisfaction Index Module Settings & Usage

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

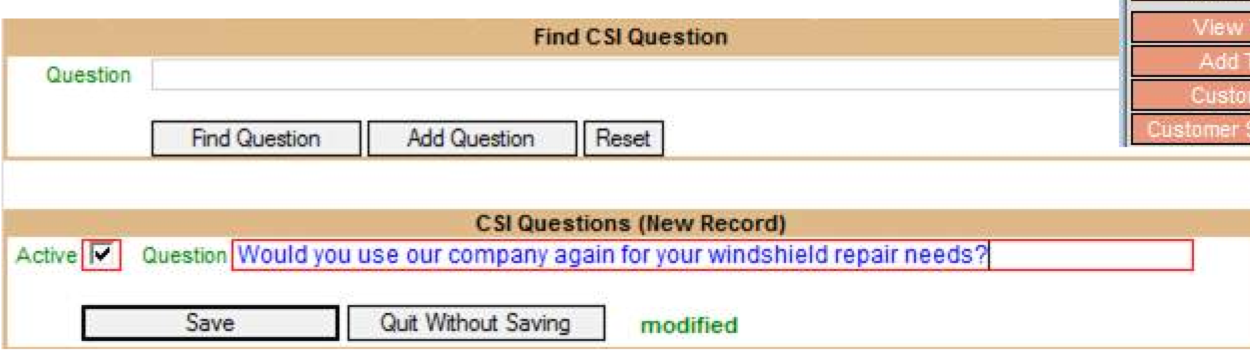
What is CSI? Customer satisfaction, a term frequently used in marketing, is a measure of how products and services supplied by a company meet or surpass customer expectation. Customer satisfaction is defined as "the number of customers or percentage of total customers, whose reported experience with 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 do this, shops need reliable and representative measures of satisfaction and that is what the CSI module in eDirectGlass delivers.

<u>Adding CSI Questions</u>

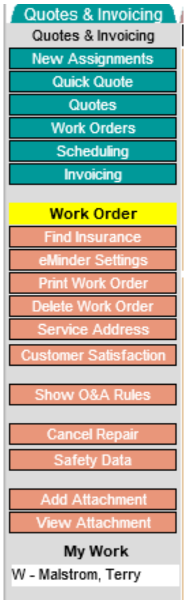
To setup your CSI questions, go to Administration->System Admin and select the Customer Satisfaction button at the bottom of the left sub-menu:

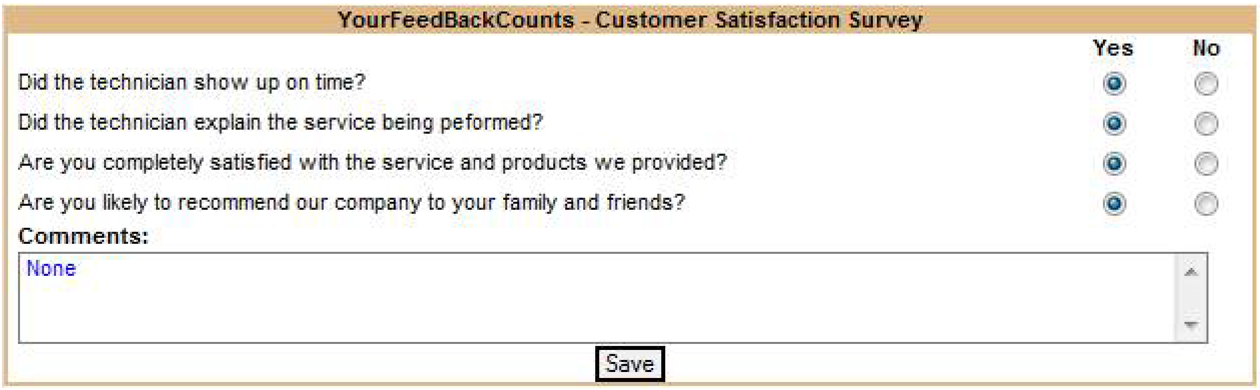
When you click on the Customer Satisfaction button, you can search for questions you have already entered to either edit the question or enable/disable it. To add a question, click on the Add Question button.



Select whether the question will be “Active” or not and then add the question. Click the Save button to save the question.

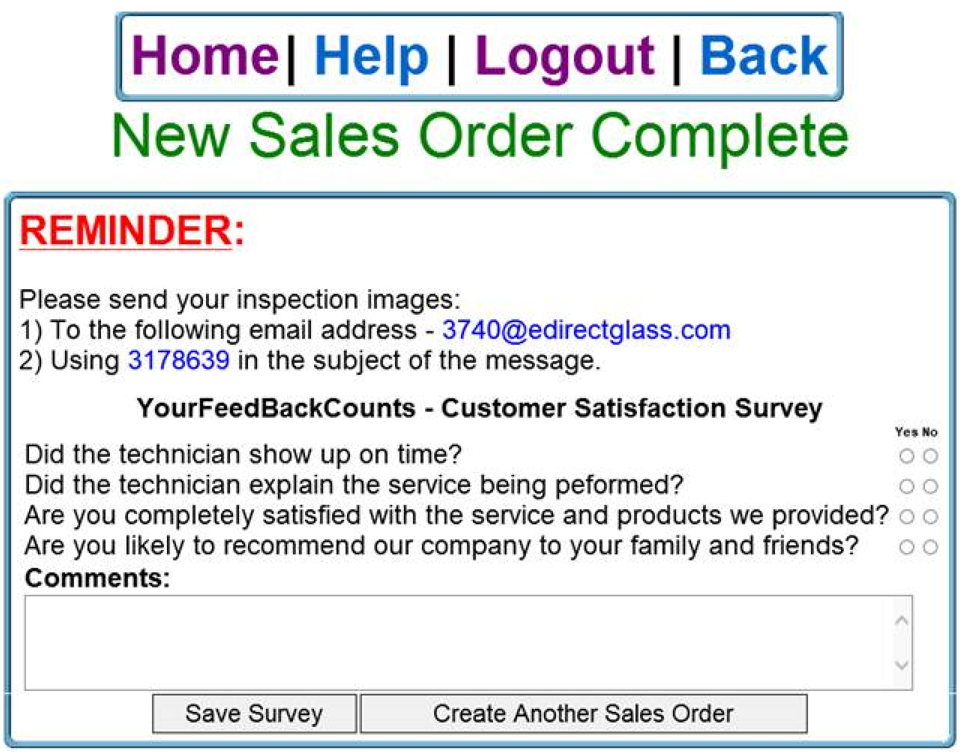
When you are in a Work Order or Invoice, you can click on the “Customer Satisfaction” button in the sub-menu to fill in the answers, if delivered on a ticket/work order, or to review answers already provide previously. Remember to click on the Save button if you make any additions or changes.





Recoding CSI in Mobile Sales Center

If you are using the Mobile Sales Center or Technician Mobile Only Edition, your mobile employees have the ability to electronically record the CSI answers with the customer, at the time of the repair or replacement. When the technician or salesperson has completed the job and the customer has signed the order, the system will then display the CSI questions as the last step of the job.

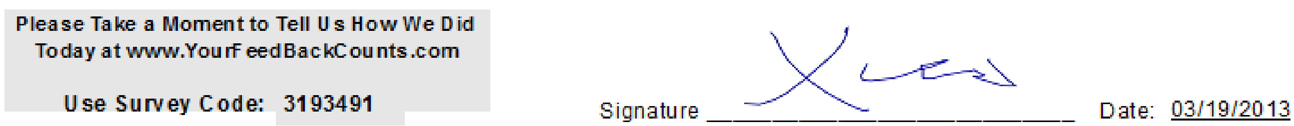


Simply have the customer answer “yes” or “no”, add any comments, and then click on the ‘Save Survey’ button.

Work Order Survey Reminder

You can have a survey reminder printed on the bottom of your work order. This reminder to take your survey contains a website link and survey code that the customer can use to complete your survey at any time. To enable this feature, go to Administration->System Admin. Check the ‘Yes” box next to the line that reads ‘Print CSI Link on WO?” and then click on the ‘Save’ button at the bottom.

When you print a work order now, the following will appear to the left of the ‘Signature’ area:


Please Take a Moment to Tell Us How We Did Today at www.YourFeedBackCounts.com

Use Survey Code: 3193491

Signature ________________________ Date: 03/19/2013

You can also call and remind your customers to take the survey by simply telling them to go to www.yourfeedbackcounts.com and enter the work order number as the survey code.

Appendix J – Part Notes Settings & Usage

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

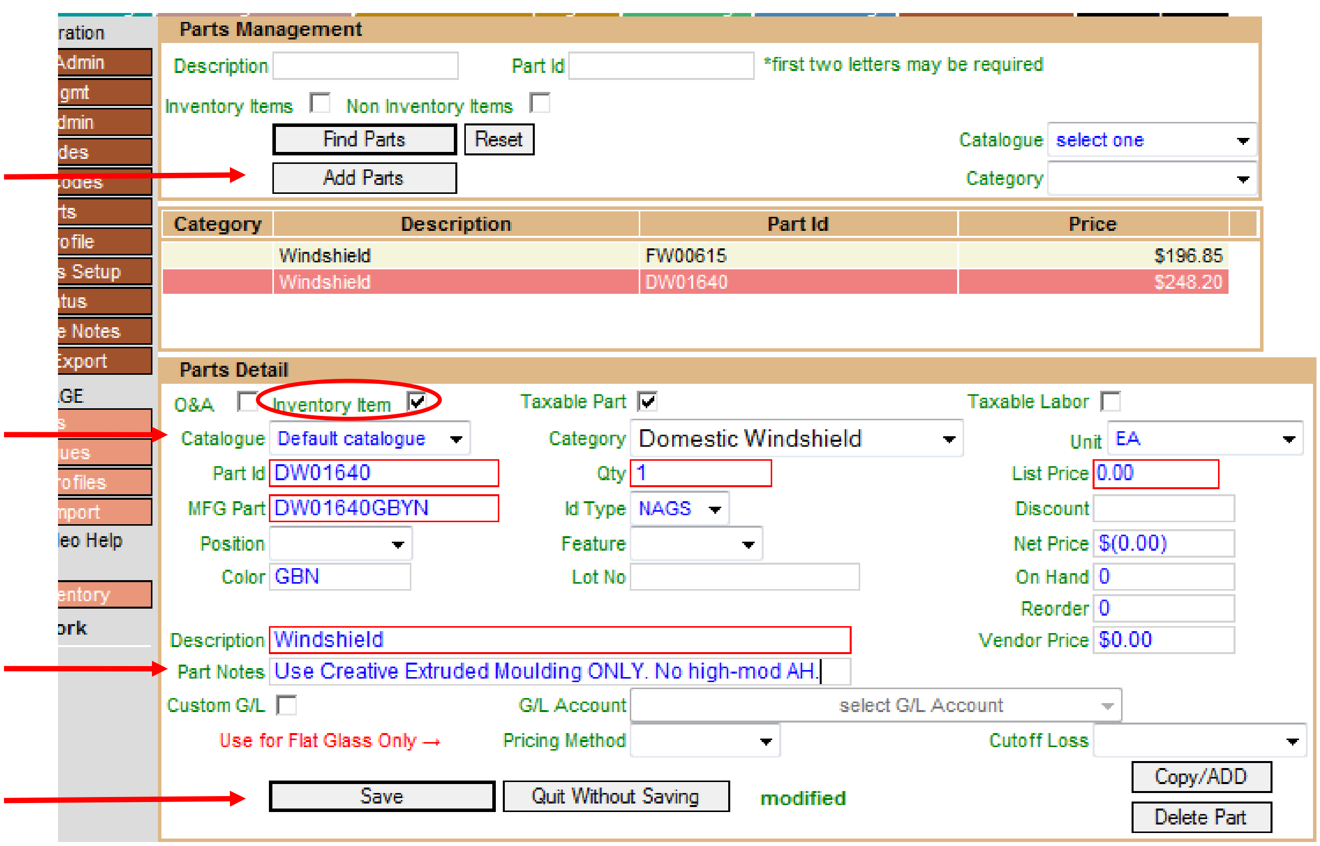
Adding Part Notes

In order to add notes 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 (<u>this is for adding a new part only</u>).
2) Complete the fields that are mandatory (red boxes) and any additional information including the ‘Part Notes’.

<u>Please Note:</u>

A) 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.
B) The part **MUST** be added to the ‘Default Catalogue’ **<u>ONLY</u>**.
C) If you are adding a NAGS part, click on the Lookup/ADD to easily create a part in your local catalogue. Remember, you must have the fully qualified NAGS part number in both the ‘Part Id’ and MFG Part fields in order for the system to properly display the ‘Part Notes’.

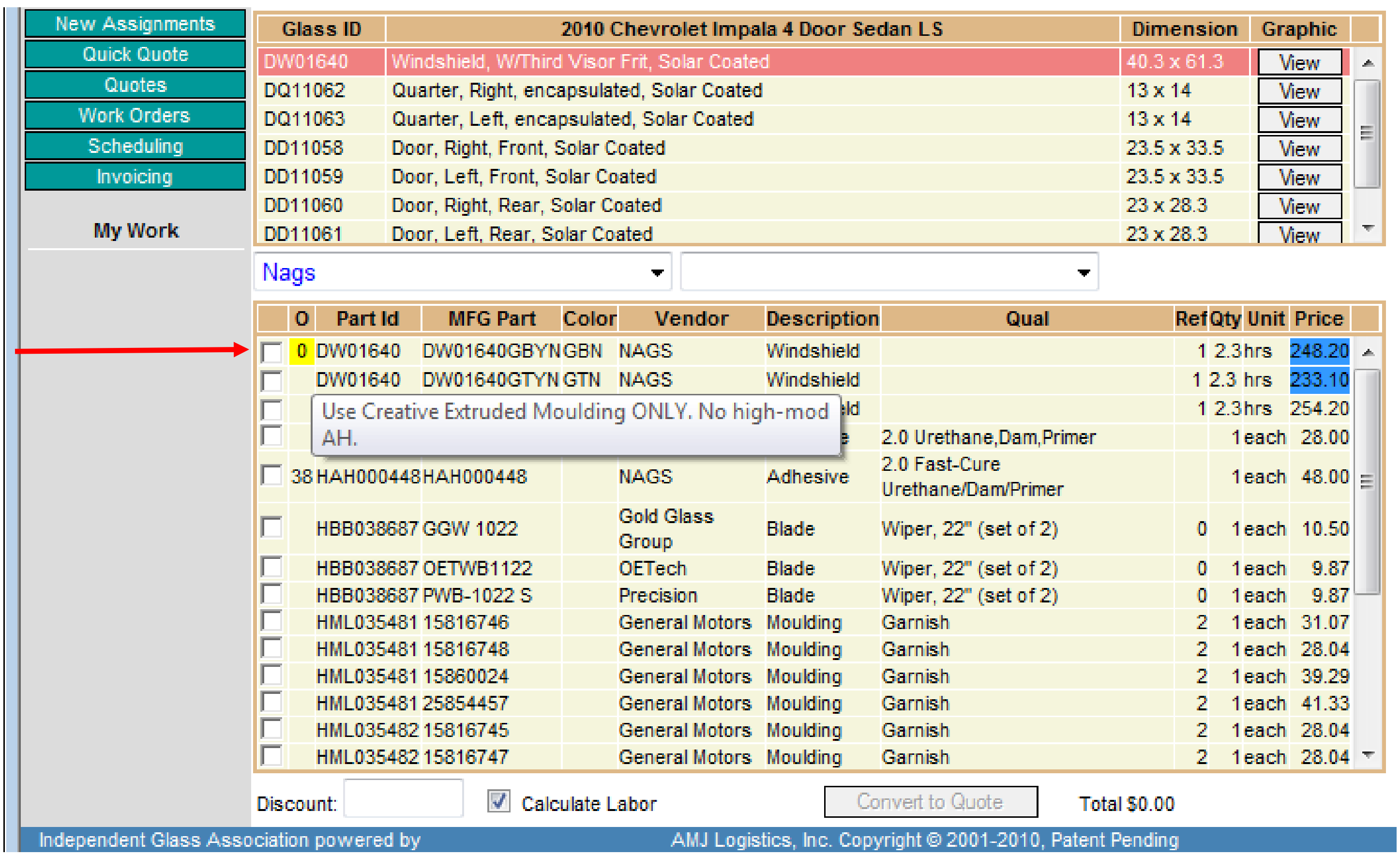


Displaying Part Notes

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 you mouse over the yellow highlighted area, on the part line it corresponds with, to see the ‘Part Notes’.



Appendix K – Technician Route/Schedule Mapping

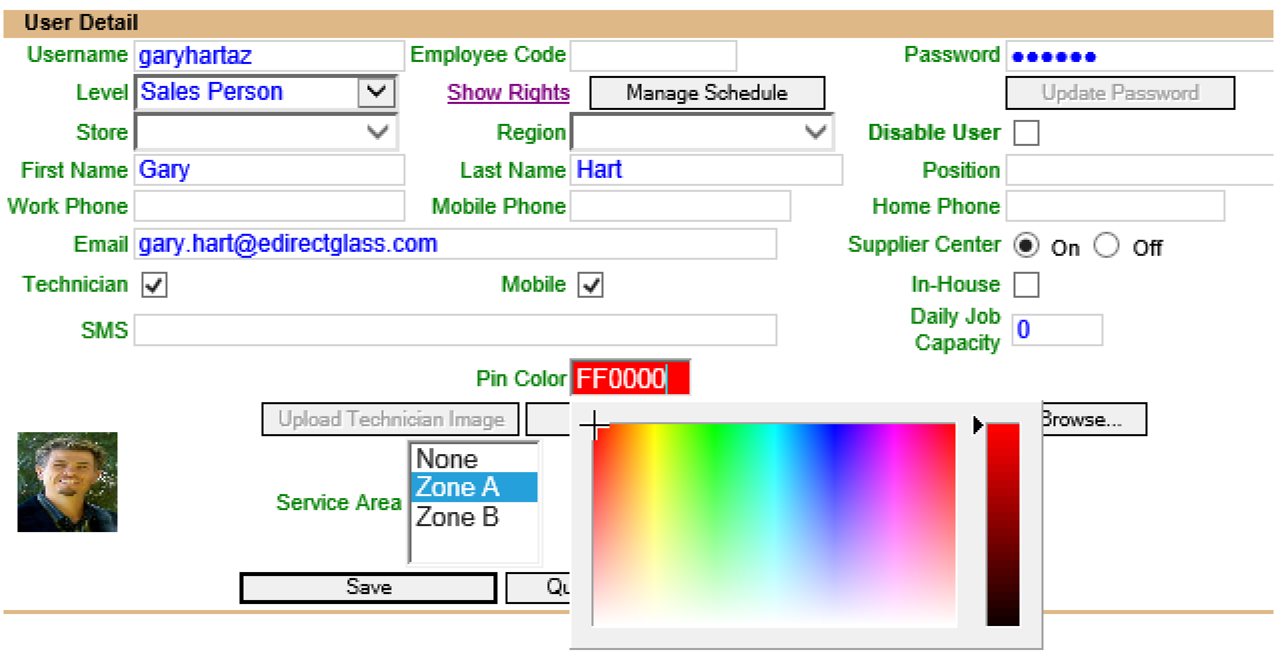
Overview

Total Shop Management (TSM) allows you to see all of your scheduled jobs for any given day, by technician, on a standard or satellite map.

To get started using this feature, please follow this document step by step.

Technician Setup

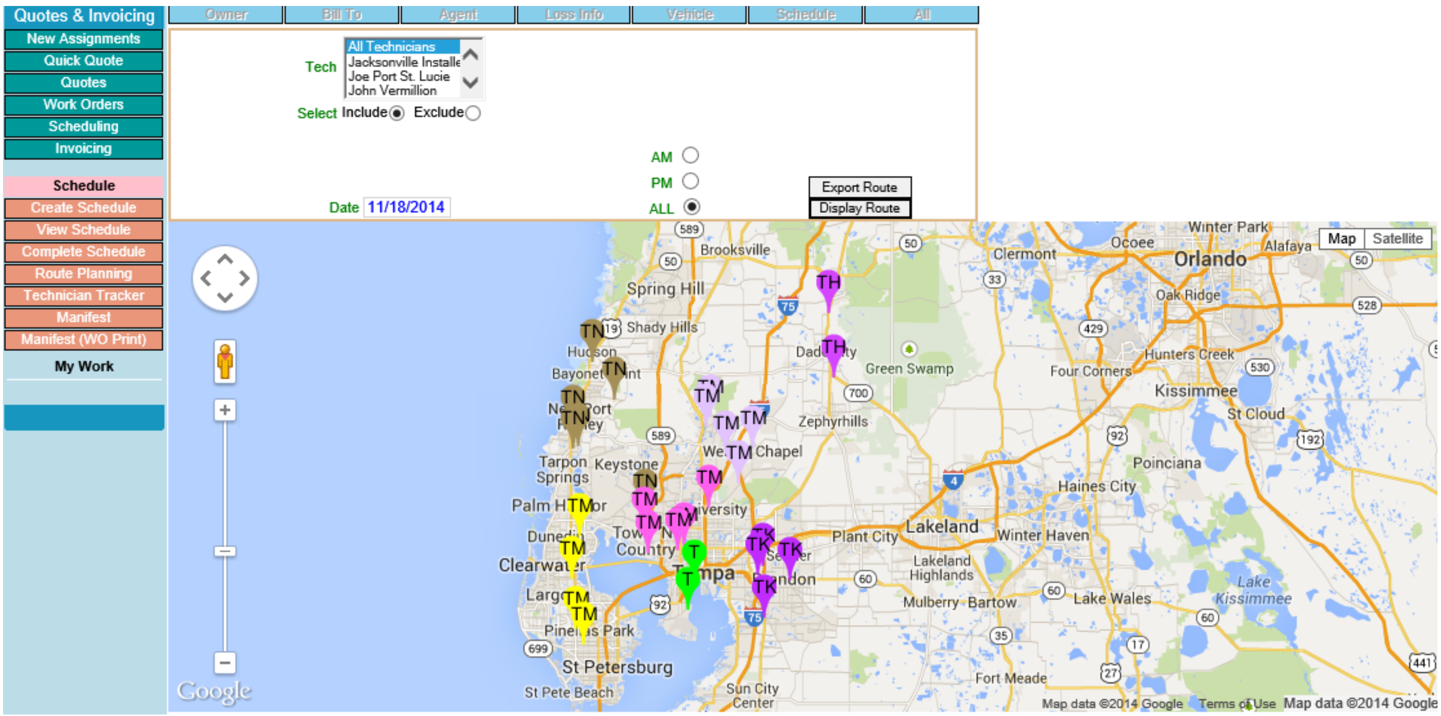
1) Go to Administration->User Mgmt.
2) Look up the technician you want to work on to add a color push-pin for.
3) Once the record appears on the screen, click on the 'Pin Color' box and select the color you want to assign for this technician from the color chart that will appear.



4) Click on the 'Save' button to assign the 'Pin Color' you just selected from the color chart.

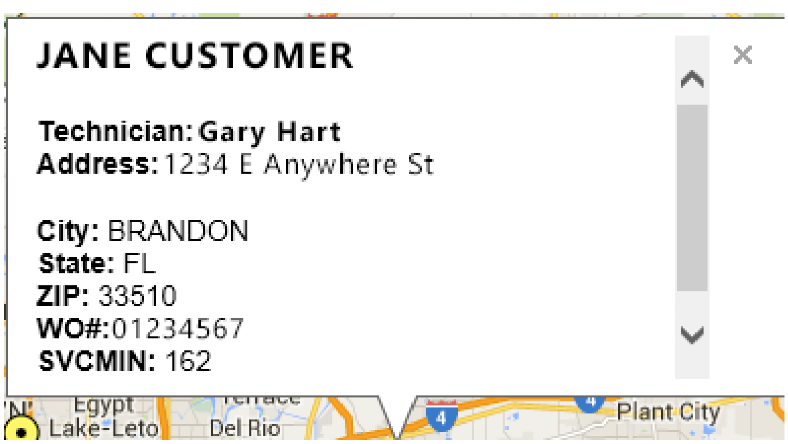
Using the Route/Schedule Mapping Feature

1) Go to Quotes/Invoicing->Scheduling->Route Planning.
2) Select either ‘All Technicians’ or select a Technician.
3) Select the date of the route/schedule you want to view.
4) Choose either AM, PM, or ALL.
5) Click on the ‘Display Route’ button. The screen will then display the map and begin placing push-pins that will contain the technician’s initials for easy identification.



NOTE: *If you Select “All” to show AM and PM jobs, PM job push-pins will have a black outline!*

6) To see the job information associated with a push-pin, simply click on the pin and a box will pop-up with the information. Click on the X to close the box.



Note: *The SVCMIN field stands for Service Minutes and repesents the labor time as reported by NAGS.*