



MyGlassClaim Quick Start Guide

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.

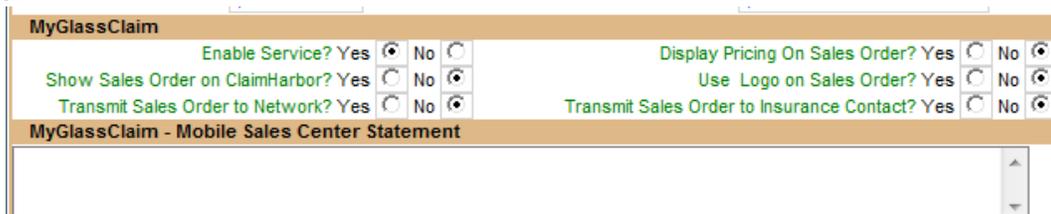
- 1) Go to the Administration tab, followed by clicking on the System Admin button.
- 2) In the Shop Detail panel, scroll down to the section labeled MyGlassClaim.



- 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 Safelite, LYNX, 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.

The screenshot shows the 'MyGlassClaim' configuration screen. It includes several radio button options for 'Yes' or 'No':

- Enable Service? Yes (selected) / No
- Show Sales Order on ClaimHarbor? Yes (selected) / No
- Transmit Sales Order to Network? Yes (selected) / No
- Display Pricing On Sales Order? Yes (selected) / No
- Use Logo on Sales Order? Yes (selected) / No
- Transmit Sales Order to Insurance Contact? Yes (selected) / No

Below these options is a section titled 'MyGlassClaim - Mobile Sales Center Statement' containing a text area with the following text:

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

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.

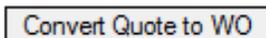
When in a Quote or Work Order on the Vehicle tab, you will see a button called 'Submit to MGC' at the bottom of the Owner Inv or Ins/Fleet Inv screen next to the Convert Quote or Work Order button.



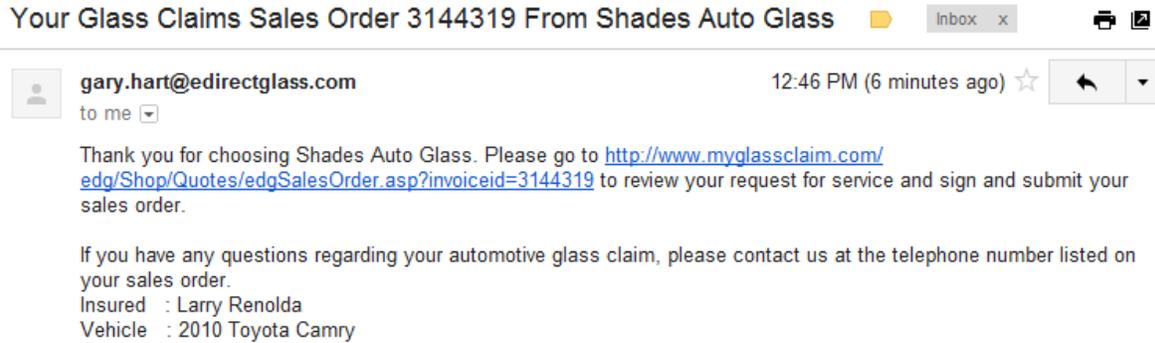
You can only click on the 'Submit to MGC' button once so make sure you are doing it at the right time in your process with the customer.

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.

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



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
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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.

Sign and
Submit Your
Signature



myglassclaim.com Real Signature

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
to me ▾

📧 1:15 PM (4 minutes ago) ☆

↩️ ▾

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	Inspection	Print?	Image?	DI?	Title	Description
SalesOrder3144319.pdf	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sales Order	

Signed Sales Order Attachment in eDirectGlass Glass Record Example

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.

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 Safelite, LYNX, 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.ClaimHarbo.com to review the Sales Order or other related claim materials.

