

Total Shop Management User Manual

 \odot <2013> ... AMJ Logistics, Inc.

eDirectGlass Total Shop Management

by AMJ Logistics, Inc.

eDirectGlass Total Shop Management User Manual

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1

Many Claims - One Solution

It's Everything You Need!

The Freedom to...

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

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

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

Because the Right Tools Make All the Difference.



1 Getting Started

1.1 Introduction

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

eDirectGlass Benefits

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

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

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

1.2 System Requirements

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

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

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

1.3 Screen Settings

4

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

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

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Less		- More	Highest	(32 bit)	~
	1024 by 7	68 pixels			
✓ Use this device as the primary monitor.					
 Extend my Windows desktop onto this monitor. 					
Identity Troubleshoot Advanced					
OK Cancel Apply					

Display Properties Screen

1.4 Text Size

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

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



Text Size Selection Screen

1.5 Security Settings

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

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

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Change now weopages are displayed in Settings tabs. Appearance Colors Languages Fonts Accessibility	History Specify how many days Internet Explorer should save the list of websites you have visited. Days to keep pages in history: 20 -
OK Cancel Apply	OK Cancel

6

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

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Security Settings

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

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1.6 Installing Crystal Report Viewer

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



- 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.

🖉 Crysta	l Reports ActiveX Viewer - Windows Internet Explorer		_181×
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💡 Click	here to install the following Active/Control: "Dystal Smart Viewer for Active/C from "Dy	sk What's the Risk?	2
		More information	
	Install ActiveX Co	ontrol	

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.



1.7 Installing DBPIX Attachment Plug-In

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

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



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



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

1.8 Configure the Registry of Attachments

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

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



Registry Download Warning

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



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

1.9 Connecting to eDirectGlass

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

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

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

1.9.1 Login

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

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



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

	Shades Auto Glass		Welcome Gary Hart Last Sign On:5/15/2013 10:16:00	AM
	8687 E Via De Ventura		Did You Know?	۲
	STE 310 Scottsdale, AZ 85260		Popular TSM Add-on Services	
NPS - Custo	omer Satisfaction Score	۲	Real-time Cost Plus Did you know you can create cost plus pricing catalogues based on real-ti	me
Your Score is	: -86%		supplier pricing? This feature can be added to any Quote Only, Bronze, Silver or Gold edition of Total Shop Management. Contact the sales department for more information or to add the service today.	
Shop Messa	age	۲	What's New?	۲
 NAGS UPD New NAGS p 	vicing and updates will go in to effect a May 13, 2013!.	is of	MyGlassClaimYou can quickly provide customers with an electronic sales order where the service request can be reviewed along with your terms and conditions. Once the terms and conditions are accepted, the customer electronically signs the sales order and it is automatically transmitted to the necessary parties including the insurance company, third-party administrator (aks Safelite) and the	
Support Inf	fo	۲	ClaimHarbor system. GET STARTED NOW!	
1. Call : 2. Call : Teleg Mon PDT/ 3. Email supp	Ive begisoning r 1-480-993-0915, press 3, phone Support hours are day-Friday, 6:00AM-5:30PM (MST 8 your issue to cort@edirectglass.com.			
Inductor Ale	TRANS		10 15 10 AM - Wednesday, 15th May	-

1.9.2 Log Off

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

are done in eDirectGlass.



1.10 eDirectGlass Administration

DO NOT SKIP THIS STEP

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

1.10.1 System Administration

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

employees to give to a customer in the Deductible Discount Max field and the text you

wish to appear on the customer's deductible invoice in the Discount Text. . We recommend "PROMOTIONAL" as the Discount Text.

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

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

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

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

Shop Detail				
Company Name	Shades Auto Glass			Starting Invoice# 0
Address	8687 E Via De Ventura			Track Inventory yes 🔎 no 个
Address2	STE 310			My Work Prompt yes C no 🕥
City	Scottsdale	State AZ	Zip 85260	Enable Fast Track yes 🔎 no 🔿
Phone	(480) 993-0915			Adhesive Type HAH000448 💌
Fax	(480) 422-9085			Print CSI Link on WO? yes 🔎 no 🔿
Main Contact	Gary Hart 🔹 🔻			Default Catalog Mygrant supplier cost LIVE 🗢
Email	edirectglass@gmail.com	1		Default Profile Included Mygrant
Labor Rate (/hour)	\$85.00	Deducti	ble Discount Max	\$50.00
Discount Text	PROMOTIONAL			
SMTP Mail Server	mail.yourmailserver.com			Fax Invoice 🔽
SMTP User Name	gary.hart		SMTP Password	•••••
Safelite Parent Id	000000	Lynx Parent Id	0000	Lynx Origination Id 0000
PGW Shipto Id's	900001 Default	-		
Pilkington Cust Id	0000	Password	0000	
Mygrant Cust Id	Cx000000-x00x	Password	000	Mygrant User Id 0000
		Shop Detai	1	

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

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

	Tax Id	Tax Rate Parts	Tax Rate Labor	
Federal	5488445454	0.000	0.000	
State	State878099	0.000	0.000	
	Shop D	otail Tax ID and Paton		

Shop Detail - Tax ID and Rates

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

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

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

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

	Hours of Op	eration			Days of Operat	ion
Start time	8 AM	~	Monday	Tuesday	Wednesday	🗹 Thursday 🗹 Friday
End time	6 PM	*	Saturday	Sunday	Do not allow A	ssignment prescheduling
Schedule Type	Hourly Based So	chedule: (AMPM Bas	sed Schedule	•	
					Total Shop Capac	ity 45

Shop Detail - Hours and Days of Operation

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

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

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

MyGlassClaim								
Enable Service? Yes 🗭 No C Display Pricing On Sales Order? Yes 🗭							С	
Show Sales Order on ClaimHarbor? Yes 🗭 No 🗋 Use Logo on Sales Order? Yes 🗭							С	
Transmit Sales Order to Network? Yes 🕝 No 🗋 Transmit Sales Order to Insurance Contact? Yes 🕞 N								
MyGlassClaim - Mobile Sales Center Statement								
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 💗								
							_	

Shop Detail - MyGlassClaim

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

WO 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	-					
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	*					
WO & Invoice Statements						

1.10.1.1 Profit Analyzer

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

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

Profit Analyzer	Include cost a	ssumptions	. 0	to 25% for award level 1, etc
Kit estimated cost	\$20.00		Rebate level 1	ValPak Book
Tech estimated cost	\$30.00		Rebate level 2	Omaha Steaks
Operations estimated cost	\$35.00		Rebate level 3	Delta Companion Ticket
Other estimated cost	\$10.00		Rebate level 4	\$100 VISA Gift Card
-		Chan Data	Drafit Analyman	



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

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

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

O)	vner	BILTO		Agent	Loss info	Vehicle	Sche	iule.		AI			>> Open/Close
	Pric	ing Catalo	gue		Pricing	Profile						^	
Insura	ince O&A	contract		 STATEV 	VIDE MUT	JAL	•						SANI-COMN
Clas	- 10		000 T	unde Commer 4 De	as Padan		Dimension	0	mbla	Info			Advertisement
Glas	IS ID	4	00910	byota Camry 4 Do	or sedan		Dimension	Gra	spnic	into			Supplier Center
EW028	27 Wi	ndishield, W/Thir	d Viso	Frit, Solar Coated	lines Fail Cale	Control	39 X 58.3	Ľ	ew	Info	-		EW02627GBVN M 19 856 70 A
FW020	20 WI	at Dicht Deer	Color C	ic Mirror, w/inird v	ISOF FIR, SOID	ir Coated	39 X 50.5	H	ew [Into	=		FW02627GBYN P 50 \$241.15
FV225	03 Ve	nt, Right, Rear,	Solar Cr	oated			11 × 14.5	Hě	wew				
FD229	29 Do	or Right Front	IISA R	uit Solar Coated			20 x 36 5	H	iew i				
FD229	30 Do	or Left Front I	ISA Bu	ilt Solar Coated			20 x 36 5	H	iew .				
FD229	31 Do	or Right Rear	Solar C	coated			17 x 24.5	H	iew.		÷		
			Cal.		Barrada Marra					Delas.			
0	Part Id	MFG Part	Color	Vendor	Description	Q	ual	Ret	Qty Unit	Price	_		
	W02718	FW02718GBY1	GBN	STATEWIDE MUTUAL	Windshield			1	3.3hrs	135.75	â		
🛛 3 P		FW02627GBY1	GBN	STATEWIDE MUTUAL	Windshield				3.3 hrs	60.29			
	W02627	56101-06170	GBY	Toyota	Windshield			1	3.3hrs	1,030.04	Ε		
	W02627	56101-06171	GBY	Toyota	Windshield			1	3.3hrs	1,031.28	3		
	W02627	56101-06172	GBY	Toyota	Windshield			1	3.3hrs	1,038.26	3		Parts Lookup/Order
	HAH000004	HAH000004		STATEWIDE	Adhesive	2.0 Urethane,D	am,Primer		1 each	50.00)		Order Management
V 34)		HAH000448		STATEWIDE MUTUAL	Adhesive	2.0 Fast-Cure Urethane/Dam	Primer		1each	50.00			Report a Part Issue
	HBB038684	GGW 1020		Gold Glass Group	Blade	Wiper, 20"		0	1each	8.65	5		Productivity
	188038684	OETWB1120		OETech	Blade	Wiper, 20"		0	1each	8.15	5		Technician Treaker
	188038684	PWB-1020 S		Precision	Blade	Wiper, 20"		0	1each	8.15	_		Technician Tracker
	HBB038689	GGW 1024		Gold Glass Group	Blade	Wiper, 24"		0	1each	13.25	5		
Discour	nt:	V	Calcula	te Labor		Convert to Quote	Total \$3	01.11	1			÷	Omaha Steaks

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

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

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

0	wner	Bill	То	Agent		Loss Info		Vehicle		Schedu	ie –	Al	
												Vehicle	. <<
					Ticket#				1	NO#	37403	321867	_
				TK	cket Date								
	2000				VIN							and and	a
Toyota Camry											not c	toded •	5
4 Door Sedan					License			State		le le	voice C	ode / History	1
Lookup Vehicle			de		Mileage			Color					
					Sa	ve Une	6						
								1018	10110	~			
	Owner Inv		lns/F	leet Inv									
Glass ID Description								Dime	nsion	Invoice	<<		
FW02627 Windshield, W/Thi				hird Visor	Frit, Solar Co	ated		_	39 >	c 58.3	No Invoice#	-	
0	P	art Id			escripti	on		Qty Unit	List	0&A	Disc	Net	Tax
3	FW02627		W	indshield	GBN	L.		1each	\$241.15	$\overline{\mathbf{v}}$	75%	\$60.29	∇
-	LABOR		W	indshield	Labo	or		3.3hrs	\$85.00	$\overline{\mathbf{v}}$	flat	\$135.00	
34	HAH00044	8	A	dhesive	2.0 F Ureth	Fast-Cure ane/Dam/Prim	ner	1 each	\$48.00		flat	\$50.00	V
21	HML037318	8	M	oulding	3/4,	Top & Sides		1each	\$55.82		flat	\$55.82	∇
	Ad	d Line	New	Glass Part	Che	sok Inventory/	Order			S	ub Total	\$301.11	
				Paumant/Ad	i stment						Tax	\$2.49	
				r ayment roo	osument.					Total	Charges	\$303.60	
Deduc	tible Disc.	\$	0.00							De	ductible	\$0.00	
□ Ap	ply Cash Dis	scount		Override O&A							Total	\$303.60	
					Rebate:	2 Omaha Ste	aks		-				
	Submit to MGC Convert Quote to WO												

1.10.1.2 MyGlassClaim

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

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

Getting Started:

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

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



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

SMTP Mail Server mail.yourm	ailserver.com	Fax Invoice	
SMTP User Name gary.hart		SMTP Password	

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

MyGlassClaim								
Enable Service? Yes	۲	No	C	Display Pricing On Sales Order? Yes	۲	No	С	
Show Sales Order on ClaimHarbor? Yes	Show Sales Order on ClaimHarbor? Yes 💽 No C Use Logo on Sales Order? Yes 🖲							
Transmit Sales Order to Network? Yes 🗭 No 🔿 Transmit Sales Order to Insurance Contact? Yes 🗭								
MyGlassClaim - Mobile Sales Center Statement								
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 connectio	n w	ith m	iy da	maged glass to Shades Auto Glass. I authorize and 💌				

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

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

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

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

Using MyGlassClaim

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

When in a Qu	uote or Work Order o	n the Vehicle tab, you will see	e a button called	Submit to MGC	at
the bottom of	the Owner Inv or Ins	s/Fleet Inv screen next to the	Convert Quote to W	if you are in a	
Quote or the	Convert WO to Invoice	if vou are in a Work Order.	ou 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 <u>Submit to MGC</u> 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.

Your	Glass Claims Sales Order 3144319 From Shades Auto	Glass		Inbox x	Ð	⊵
+	gary @edirectglass.com to me 💽	12:46 PM ((6 min	utes ago) 🕁 🛛	*	•
	Thank you for choosing Shades Auto Glass. Please go to http://www.mygla:edg/Shop/Quotes/edgSalesOrder.asp?invoiceid=3144319 to review your requisales order.	ssclaim.com uest for servi	<u>n/</u> ice an	d sign and sub	mit you	r
	If you have any questions regarding your automotive glass claim, please con your sales order. Insured : Larry Renolda Vehicle : 2010 Toyota Camry	itact us at th	he tele	phone number	listed o	'n

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

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	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) 555-1212Insurance Company: STATEWIDE MUTUAL Claim # Policy # 456456664 Vehicle: 2010 Toyota Camry 4 Door Sedan VIN: 4T1BF3EK8AU524988Date: 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 \$375.50 TAX \$3.61 Gross Total \$379.11 \$269.00 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.

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

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



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

gary@edirectglass.com to me 💌	C 1:15 PM (4 minutes ago) ☆	•
Thank you for choosing Shades Auto Glas number 3144319 for your review.	ss. Attached, please find a copy of your Sales Order	
If you have any questions regarding your a number listed on your sales order.	utomotive glass claim, please contact us at the telep	phone
Claim Nr :		
Claim Nr : Insured : Larry Renolda		
Claim Nr : Insured : Larry Renolda Vehicle : 2010 Toyota Camry		

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

	Attachments for Job #3144319								
	WO Inspection								
File Name	Print?	Image?	DI?	Title	Description				
SalesOrder3144319.pdf				Sales Order					

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

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

If you selected either the Transmit Sales Order to Network or Insurance Contact in your MyGlassClaim

setup, MyGlassClaim will send a copy of the signed Customer Sales Order - First Notice of Loss to the respective parties via email.

🖂 Message 📍	🔊 SalesOrder3144319Insurance.pdf (8 KB)
-------------	---

Dear Third-Party Administrator,

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

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

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

Best Regards,

Shades Auto Glass

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

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

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

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

Setting the Standard for Automotive Glass Claims through Innovative Technology
ClaimHarbor - Electronic Inspection & Audit Center
Locate Auto Glass Claim Record for Inspection or Audit
Please enter data in at least two or more fields to perform an authenticated search:
Insurance Claim # or TPA Authorization/Referral #
Quote/Work Order/Invoice Number
Vehicle Identification Number
Owner ZIP Code
Find Claim Record Reset

ClaimHarbor Portal

1.10.1.3 Multiple Tax IDs & Rates

If your company is responsible for paying taxes using differing rates (i.e., reporting to multiple city, county or state agencies), you can administer those rates in the Administration module of eDirectGlass. This function allows you to ensure that the proper tax rates are applied to your

company's invoices based on the zip code entered on the Owner tab of the claim record. Please keep in mind that any rates entered under Multiple Tax IDs will be added to the tax rates which you may already have set up under System Admin.

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

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

1.10.1.3.1 Add Tax IDs & Rates

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



Enter a state where tax rates apply

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



County Selection Screen

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

City Selection Screen

If there are city/local taxes, select a city.

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

New Tax Area				
In-House Name				
Province	AZ			
County	MARICOPA			
City	GILBERT			
QuickBooks Tax Code				
	Tax Id	Tax Rate Parts	Tax Rate Labor	
County				
Local(City)				
		Add This Tax Location	Quit Without Saving	

New Tax Area Window

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

	New Tax Area				
In-House Name	Gilbert				
Province	AZ				
County	MARICOPA				
City	GILBERT				
QuickBooks Tax Code	AZGILA				
	Tax ld	Tax Rate Parts	Tax Rate Labor		
County	2999999	1.65	0		
Local(City)					
		Add This Tax Location	Quit Without Saving		

Completed New Tax Area Window

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

1.10.1.3.2 View & Maintain Tax IDs & Rates

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

Find Tax-ID	
In-House Name	County All Counties
	Find Tax-ID Reset
	Add Tax-ID
	Final Taxa ID Minalawa

Find Tax-ID Window

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



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



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

	d Tax-ID							
In-	House Name	County All Co	unties			¥		
	Find Tax-ID	Reset						
	Add Tax-ID							
-								
State	County	City	County TaxId	Labor	Parts	Local Laxid	Labor P	arts
State	County	City	County Taxid	Labor	Parts o	Local Taxid	LaborP	arts
AR AZ	CARROLL MARICOPA	PHOENIX	County Taxid Debeairea azmarphx	Labor 0	Parts 5	Local Taxid	Labor P 0	arts 0
AR AZ AZ	CARROLL MARICOPA MARICOPA	PHOENIX SCOTTSDALE	azmarphx azmarsct	Labor 0 0	5 5	Local Taxid	U O O	0 1
AT AZ AZ AZ	CARROLL MARICOPA MARICOPA MARICOPA	PHOENIX SCOTTSDALE TEMPE	County Taxid sessenrea azmarphx azmarsct 87-457-5984-A	Labor 0 0	5 5.1 5.5	574-58457-TA	U O O O	0 1 0 2

Find Tax-ID List Window

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

		Edit Tax Area		
In-House Name	AZMARTEMPE		State	AZ
County	MARICOPA		City	TEMPE
	Tax Id		Tax Rate Parts	Tax Rate Labor
County	87-457-5984-A		5.5	0
Local(City)	574-58457-TA		2	0
	Save	Quit Without Saving		Delete Tax Profile
	0010	ton manous ourrang		D'ORIG T GAT TOTAL

Edit Tax Area Window

4. Your three options here are:

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

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

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

Microsoft Internet Explorer				
2 Delete	this Tax Profile?			
ОК	Cancel			

Delete Tax Profile Dialogue Box

1.10.1.4 Custom Logo

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

- 1. To upload your logo, go to Administration, System Admin and click on the Custom Logo button.

selected it, click on the



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

1.10.1.5 Customer Satisfaction Index

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

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

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

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

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

```
1.10.1.5.1 Adding CSI Questions
```

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

Question
Find Question Add Question Reset
Customer Satisfcation Question (New Question)
Active
Question is Net Promoter Score Based
Question
Save Quit Without Saving

Customer Satisfaction Question (New Question) Panel

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

Customer Satisfcation Question (New Question)						
Active						
Question is Net Promoter Score Based						
A Net Demotes See Pased Question Aleady Evide						
a Net Promoter Score based Question Aiready Exists.						

4.

1.10.2 User Administration

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

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

1.10.2.1 Adding a New User

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

- 3. Select the User's level:
 - Training

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- Manager
- CSR
- Admin

Sales Person (must be selected in order for the user to appear on the Sales Person drop down on the Owner Tab)

Technician (must be selected in order for the user to appear on the Schedule Tab to have jobs assigned to them)

NOTE: Until you modify the user rights (see User Rights section of this manual), they will not have access to any areas of eDirectGlass.

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

Add User					
Username	NewTech	Employee Code	4551	Password	••••
Level	Technician 💌				
Store		Region	~		
First Name	New	Last Name	Tech	Position	Technician
Work Phone	480-555-1212	Mobile Phone	480-555-1111	Home Phone	
Email	newuser@myshop.com	n			
Technician	 Image: A start of the start of	Mobile	 Image: A start of the start of	In-House	V
SMS	4805551111@cellphor	neemail.com		Daily Job Capacity	10
	Show Service Area	Disable User Save	Quit Without Saving	modif	lied
		Add U	ser Window		

1.10.2.2 Maintaining Users

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

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



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

User Detai	il				
Username	ptech	Employee Code	123456	Password	*****
Level	Technician 🔗	Show Rights			Update Password
Store		Region		~	
First Name	Paul	Last Name	Tech	Position	
Work Phone		Mobile Phone	(480) 555-1111	Home Phone	
Email	paul.tech@myshop.con	n			
Technician	¥	Mobile	V	In-House	 Image: A start of the start of
SMS	4805551111@cellphon	eemail.com		Daily Job Capacity	20
		Disable User Seve	Quit Without S	aving	

User Detail Window

1.10.2.2.1 Manage Schedule

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

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

Use	er Detail						
U	sername	ptech	Employee Code	123456		Password	•••••
	Level	Technician 🔹	Show Rights				Update Password
	Store		Region		v	1	
Fir	rst Name	Paul	Last Name	Tech		Position	
Wor	rk Phone		Mobile Phone	(480) 555-111	1	Home Phone	
	Email	paul.tech@myshop.com]		
Te	chnician	\mathbf{v}	Mobile	V		In-House	W
	SMS	4805551111@cellphone	email.com			Daily Job Capacity	5
						Manage	Schedule
		Upload Technician II	mage				Browse
Tec	hnician	Show Service Area	Disable User	P			
Im	nage]		Save		uit Without	Saving	modified
		Lloor	Mamt Llo	r Dotoil	Toohni	aian	
2. Click on the	Mar	nage Schedule b	utton to ac	cess the N	lanage	Schedu	ile panel.
Man	age Sche	dule Date	Star	t Time	End	Time	All Day
		A	add Time-Off Manage S	List Tim	••Off anel		
3. Click on the date and time	e or th	Add Time-Off le appropriate dat	outton to dis	splay the A k the All D	dd Tin ay box	ne-Off Pa	anel. Select the

List Time-Off button.

1.10.2.2.2 Technician Image

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

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

Username	ptech	Employee Code	123456	Password	*****
Level	Technician 🔹	Show Rights			Update Password
Store	÷	Region	~		
First Name	Paul	Last Name	Tech	Position	
Work Phone		Mobile Phone	(480) 555-1111	Home Phone	
Email	paul.tech@myshop.com				
Technician	V	Mobile	V	In-House	W
SMS	4805551111@cellphone	email.com		Daily Job Capacity	5
				Manage	Schedule
	Upload Technician In	nage			Browse
[Technician	Show Service Area	Disable User	(1 ²⁰)		
anage]		Save	Quit Without	Saving	modified

User Mgmt - User Detail - Technician

Near the bottom right of the User Detail screen, click on the Browse... button and search your computer for the image you wish to upload for the technician. Select the image and click on the Upload Technician Image button to attach that image to the technician selected. Once you upload the

image, a thumbhail copy will display in the lower left corner of the User Detail screen.

User Deta	il					
Username	ptech	Employee Code	123456		Password	•••••
Level	Technician 👻	Show Rights				Update Password
Store		 Region 		-		
First Name	Paul	Last Name	Tech		Position	
Work Phone		Mobile Phone	(480) 555-111	1	Home Phone	
Email	paul.tech@myshop.con	n				
Technician	V	Mobile	\checkmark		In-House	\checkmark
SMS	14804522083@tmoma	il.net			Daily Job Capacity	5
					Manage S	Schedule
2	Upload Technicia	n Image				Browse
🖺 🤮	Show Service Area	Disable User				
	Save	Quit I	Mithout Saving]		

1.10.2.3 User Rights

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

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

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

User List Window

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

User Detai	il 👘							
Username	ptech	Employee Code	123456	Password	*****			
Level	Technician 🔗	Show Rights			Update Password			
Store		v, Region		×				
First Name	Paul	Last Name	Tech	Position				
Work Phone		Mobile Phone	(480) 555-1111	Home Phone				
Email	paul.tech@myshop.cor	n						
Technician	¥	Mobile	V	In-House				
SMŚ	4805551111@cellphor	eemail.com		Daily Job Capacity	20			
Disable User C Seve Quit Without Saving								
		User D	etail Window					

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

Description	Permission
Quotes and Invoicing	
New Assignments	1
Quotes	1
Find Owner	
Repair Orders	1
Scheduling	
Invoicing	V
Convert Quote to RO	V
Convert RO To Invoice	
Create New Invoice	
Delete Quotes	
Delete Repair Orders	V
Delete Invoices	
Add Insurance	V
Message Center	
Check Messages	
Create Message	
Inbox	
Outbox	V
Sentilems	
Trash	V
C&V RELATION SHIP MANAGEMENT	
Owner Contact	1
Agent Contact	

User Rights Window

- 4. The user will be able to access and change information in all areas which have a check mark in the Permission column. To deny user access to a specific area (e.g., Invoicing) remove the check mark from the Permission column.
- 5. When you have finished making the necessary changes to the user's rights, click on the

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

1.10.3 Commission & Writers

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

1.10.3.1 Adding a New Commission & Writers Entry

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

Find Commission Salesperson or Writer						
Username	First Name	Last Name				
Find Us	er Reset					
Add Use	er					

Find Commission Salesperson or Writer Window

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

Mobile Phone		Marra Chasa	
		Home Phone	
Region	×		
Disable User 📃			
Save	Quit Without Saving		
	Region Disable User	Region Disable User Save Quit Without Saving	Region Disable User Cuit Without Saving Cuit Without Saving

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

1.10.3.2 Maintaining Commission & Writers Entries

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

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

Commission Salesperson or Writer List Window

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

Getting Started	35

you have to do is check off the Disable User 📃 box and then click on the

Save button. This will remove them from the drop-down list used to assign commission to an invoice. If you do not want to make any changes, click the Quit Without Saving button.

Commissio	on Salesperson or V	Nriter C	Detail					
First Name	james		Last Name	williams		Position	comm2	
Work Phone			Mobile Phone			Home Phone		
Email								
Store	GLASS SHOP	*	Region	Southwest	*]		
Display Name	jamesw.comm2		Disable User					
			Save	Quit With	out Saving			

Commission Salesperson or Writer Detail Window

1.10.4 Search Result Settings

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

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

User Detail					
Username: char	lie.murphy				
Quote Search	Results (select	t 6 columns)			
Date	Owner	Quote Total			
Vear 🗸	Insurance				
Make	City				
Model	Sales Person				
Work Order R	esults (select 7	columns)			
WO Code	Model	City			
✓ Date	Owner	Sales Person			
Vear Vear	Insurance	WO Total			
Make	WO Number	C Technician			
Invoice Search	h Results (sele	ct 8 columns)			
Invoice Code	Model	City	Agent 🔽		
Date	Owner	Sales Person	1		
Vear Vear	Insurance	Invoice Total			
Make	Invoice Number	Technician			
	[Save		Quit Without Saving]

User Search Results

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

1.10.5 Parts Admin

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

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

Parts Management				
Description	Part Id	*first two letters may be required		
Inventory items 🗌 Non	Inventory Items			
Find Pa	Reset	Catalogue	select one	•
Add Pa	irts	Category		*
	Parts Mana	agement Window		

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

1.10.5.1 Adding a New Parts Profile

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

Parts Deta	il					
08A 🗖	Inventory Item	Taxable Part	×		Taxable Labor	1
Catalogue	select one	 Category 	select one	-	Unit	EA 👻
Part Id		Qty			List Price	
MFG Part		ld Type	NAGS 🔫		Discount	
Position	-	Feature	*		Net Price	
Color		Lot No			On Hand	
Description					Reorder	
Part Notes					Vendor Price	
Custom G/L		G/L Account		select G/L Act	ount 🔹]
Use f	or Flat Glass Only \rightarrow	Pricing Method	-	•	Cutoff Loss	•
Sa	ve Quit Wr	thout Saving			Lookup/AD	D

Parts Profile Detail (New Record) Window

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

36

Parts Detail						
D&A 🔲 Inventory Item 🗖	Taxable Part			Taxable Labor	V	
Catalogue Default catalogue	 Category 	Admin Fee	-	Unit	EA	-
Part Id Disposal Fee	Qty	1		List Price	15.00	
MFG Part Disposal Fee	ld Type	Other 🔻		Discount		
Position -	Feature	-		Net Price	\$15.00	
Color	Lot No			On Hand		
Description Disposal Surcharge				Reorder		
Part Notes				Vendor Price		
Custom G/L	G/L Account		select G/L Acc	ount	*	
Use for Flat Glass Only \rightarrow	Pricing Method	-		Cutoff Loss		•
Save Quit Wit	hout Saving	modified		Lookup/A	DD	

Completed Parts Profile Detail (New Record) Window

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

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

1.10.5.2 Maintaining Parts Profile

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

Find Parts button to narrow your search.

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

Parts Profile List Window

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

Parts Det	ail				
08A 🗖	Inventory Item	Taxable Part	V	Taxable Labor	
Catalogue	Default catalogue 💌	Category	Tires	- Ur	it EA 👻
Part Id	TINT	Qty	1	List Price	S25.00
MFG Part		ld Type	Other 💌	Discount	20%
Position	Unknown 💌	Feature	-	Net Price	\$20.00
Color		Lot No		On Hand	0
				Reorder	0
Description	Tinting			Vendor Price	\$0.00
Part Notes					
Custom G/L		G/L Account		select G/L Account	*
Use fo	or Flat Glass Only →	Pricing Method	-	Cutoff Loss	-
	Save	Quit Without	Saving		Copy/ADD Delete Part

Parts Profile Detail Window

3. You will have three options at this point:

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

- To **review** the information without making any changes or additions, then click on the Quit Without Saving button.
- To completely **remove** this Parts Profile Detail Record from your eDirectGlass system by clicking on the Delete Parts Profile button.

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

Microsoft Intern	et Explorer 🛛 🗶
2 Delete	this Parts Profile?
OK	Cancel

Delete Parts Profile Dialogue Box

1.10.5.3 Catalogues

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

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

Catalogue Management	
Catalogue	
Find Catalogue Reset	
Add Catalogue	
Catalogue (Heur Desord)	
Catalogue (New Record)	
Catalogue Name Milkington	
Save Quit Without Saving modified	
Add Catalogue Window	

If you need to go back and update a Catalogue name, simply go to Administration,

Parts Admin	I, I	Catalogues	and o	click on the	Find Catalogue	button to	display the list
of Catalogues.							

1.10.5.4 Pricing Import

Why would you want to upload a pricing file to a Catalogue in eDirectGlass?

- a. If you want to create cost plus pricing profiles,
- b. If you want to manage inventory without having to enter thousands of parts,
- c. If you want to see your costs on your most popular parts you sell.

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

	A	В	С	D	E	F	G	Н	-
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					-
14 4	🕩 🗷 Sheet1 🤇 🗞	j /			1				•

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

Supplier Pricing File Example

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

To modify the Excel file, please follow these steps:

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

4	A	В	С	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.

Aria	10 A A S ~ % , J	ntract Number			
B	I 👅 🗄 * 🌺 * 🚣 * 🐝 🖧 🖬		С	D	E
1	Contract Number Contract De	scription	AGR Nbr/Type/Hw	Current Price	
2 8	Cut	г	1009-06XXN	3.21	
3 00	Сору		3M60600XXN	12.25	
4 🕰	Paste		3M6818XXN	2.89	
5	Paste Special		3M8879XXN	3.29	
6	Insert		3M8984XXN	12.6	
7	Delete		47033XXN	7.01	
8	Clear Contents		D-500FWXXN	6.11	
9	Exempt Calls		D-500SAXXN	4.67	
1	Pormat Cens		D-500XXN	3.86	
1	Kow Height		D-501HVFWXXN	7.44	
1	Hide		D-501HVFXXN	5.24	
1	Unhide		D-501HVHMFWXXN	9.81	

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

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



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

4	A	В
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
	D COALD B INTERACIONAL	0.04

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

Uploading your pricing file:

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

Quotes & Invoicing	Message Center C&V Relationship Mgmt Marketing Accounting Administration eLounge
Administration	Add/Manage Pricing
System Admin	Catalogue Pikington
User Mgmt	
Parts Admin	Select the EXCEL filename for the update of vendor pricing.
WO Codes	C:\Users\Gary\Desktop\Clean Pilkington Q2 2009.xls
Invoice Codes	
Reports	UPLOAD
Cash Profile	Quit Without Saving
QuickBooks Setup	
EDI Status	
Bulk Invoice Notes	
Contact Export	
MANAGE	
Parts	
Catalogues	
Pricing Profiles	
Pricing Import	

- 5. If this is your first time uploading a pricing file to the Catalogue you selected, you will get a message saying the upload was complete. Click on the OK button to finish.
- NOTE: If you are uploading an existing Catalogue with a new pricing profile, you will receive a pop-up box asking if you wish to overwrite the date already in the Catalogue. If you answer yes, it <u>will delete</u> all of the data in the Catalogue and replace it with the data in the pricing file you are attempting to upload.

Windows I	Internet Explorer 🔤 🗐	x
?	This upload will replace any existing entries for this catalogue. Proceed?	
	OK Cancel	

1.10.5.5 Pricing Profiles

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

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

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



1.10.5.6 Part Notes

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

*NAGS is the registered trademark of Mitchell International.

1.10.5.6.1 Adding Part Notes

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

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

Please Note:

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

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

	Find Parts R	eset			Catalogue s	elect one	•
Category	Descripti	on	P	art Id	Category	Price	•
Win	dshield		FW00615			\$196.8	35
Win	dshield		DW01640			\$248.2	20
Parts Detail							
0&A 🗌 Inver	tory item 🔽	Taxable Part			Taxable Lat	or 🗖	
Catalogue Defa	ult catalogue 📼	Category	Domestic Wir	dshield +		Unit EA	
Part Id DW	01640GBYN	Qty	1		List Pr	ce 0.00]
MFG Part DW	1640GBYN	ld Type	NAGS -		Disco	unt	
Position	-	Feature	-		Net Pr	ce \$(0.00)	
Color GBN	1	Lot No			On Ha	nd 0	
					Reord	ier 0	
Description Win	dshield				Vendor Pr	ce \$0.00	
Part Notes Use	Creative Extruded	Moulding ONL	Y. No high-mod	AH.			
Custom G/L		G/L Account		select G/L Ac	count	~	
		Bulleting and starting of			Cuteffile		

1.10.5.6.2 Displaying Part Notes

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

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

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

	Sla	ss ID		2010 C	hevrolet Impa	ila 4 Door Se	dan LS	Dime	ensio	on Gr	aphic	
W	/01	640	Windshield, W/Thir	d Visor I	Frit, Solar Coate	d		40.3)	c 61.3		//ew	
00	11	062	Quarter, Right, encapsulated, Solar Coated				13 x 1	14		/iew	ĺ	
DQ	11	063	Quarter, Left, enca	apsulate	d, Solar Coated			13 x 1	14		/iew	
DD	11(058	Door, Right, Front,	Solar Co	oated			23.5)	x 33.5		/iew	
DD	11(059	Door, Left, Front, S	Solar Col	ated			23.5)	x 33.5	· 🗖	/iew	
DD	11	060	Door, Right, Rear,	Solar Co	ated			23 x 2	28.3		/iew	
DD	11	061	Door, Left, Rear, S	Solar Coa	ated			23 x 2	28.3		/iew	
Va	as				-		-					
								_				1
_	0	Part l	d MFG Part	Color	Vendor	Description	Qual		RefQ	ity Unit	Price	
	0	DW0164	0 DW01640GBY	NGBN I	NAGS	Windshield			12	2.3hrs	248.20	
		DW0164	0 DW01640GTY1	NGTN	NAGS	Windshield			12	.3 hrs	233.10	l
		Use Cre	ative Extruded M	loulding	ONLY. No hig	ph-mod d			12	2.3hrs	254.20	
		Use Cre AH.	ative Extruded M	loulding	g ONLY. No hig	gh-mod d	2.0 Urethane, Dam, Primer		12	2.3hrs 1each	254.20 28.00	5
	38	Use Cre AH. HAH000	ative Extruded M	loulding) ONLY. No hig NAGS	Adhesive	2.0 Urethane,Dam,Primer 2.0 Fast-Cure Urethane/Dam/Primer		12	2.3hrs 1each 1each	254.20 28.00 48.00	
	38	Use Cre AH. HAH000 HBB038	448HAH000448 687 GGW 1022	loulding) ONLY. No hig NAGS Gold Glass Group	Adhesive Blade	2.0 Urethane,Dam,Primer 2.0 Fast-Cure Urethane/Dam/Primer Wiper, 22" (set of 2)		0	2.3hrs 1each 1each 1each	254.20 28.00 48.00 10.50)
	38	Use Cre AH. HAH000 HBB038	448HAH000448 587 GGW 1022 587 OETWB1122	loulding	ONLY. No hig NAGS Gold Glass Group OETech	Adhesive Blade Blade	2.0 Urethane,Dam,Primer 2.0 Fast-Cure Urethane/Dam/Primer Wiper, 22" (set of 2) Wiper, 22" (set of 2)		0	2.3hrs 1each 1each 1each 1each	254.20 28.00 48.00 10.50 9.87	
	38	Use Cre AH. HAH000 HBB038 HBB038	887 GGW 1022 887 OFTWB1122 887 PWB-1022 S	loulding	3 ONLY. No hig NAGS Gold Glass Group OETech Precision	Adhesive Blade Blade Blade	2.0 Urethane,Dam,Primer 2.0 Fast-Cure Urethane/Dam/Primer Wiper, 22" (set of 2) Wiper, 22" (set of 2) Wiper, 22" (set of 2)		000	2.3hrs 1each 1each 1each 1each 1each	254.20 28.00 48.00 10.50 9.87 9.87	
	38	Use Cre AH. HAH000 HBB038 HBB038 HBB038 HML035	448HAH000448 887 GGW 1022 887 OETWB1122 887 PWB-1022 S 881 15816746	loulding	9 ONLY. No hig NAGS Gold Glass Group OETech Precision General Motors	Adhesive Blade Blade Blade Moulding	2.0 Urethane,Dam,Primer 2.0 Fast-Cure Urethane/Dam/Primer Wiper, 22" (set of 2) Wiper, 22" (set of 2) Wiper, 22" (set of 2) Garnish		1 2 0 0 2	2.3hrs 1each 1each 1each 1each 1each 1each	254.20 28.00 48.00 10.50 9.87 31.07	
	38	Use Cre AH. HAH000 HBB038 HBB038 HBB038 HML035- HML035-	448HAH000448 587 GGW 1022 587 DETWB1122 587 PWB-1022 S 587 PWB-1022 S 481 15816746 481 15816748	loulding	9 ONLY. No hig NAGS Gold Glass Group OETech Precision General Motors General Motors	Adhesive Blade Blade Blade Moulding Moulding	2.0 Urethane,Dam,Primer 2.0 Fast-Cure Urethane/Dam/Primer Wiper, 22" (set of 2) Wiper, 22" (set of 2) Wiper, 22" (set of 2) Garnish Garnish		1 2 0 0 2 2	2.3hrs 1each 1each 1each 1each 1each 1each 1each	254.20 28.00 48.00 10.50 9.87 31.07 28.04	
	38	Use Cre AH. HAH000 HBB038 HBB038 HBB038 HBL035 HML035 HML035	ative Extruded M 448HAH000448 587 GGW 1022 587 OETWB1122 587 PWB-1022 S 481 15816746 481 15816748 481 15860024		g ONLY. No hig NAGS Gold Glass Group DETech Precision General Motors General Motors General Motors	Adhesive Blade Blade Blade Moulding Moulding Moulding	2.0 Urethane,Dam,Primer 2.0 Fast-Cure Urethane/Dam/Primer Wiper, 22" (set of 2) Wiper, 22" (set of 2) Wiper, 22" (set of 2) Garnish Garnish Garnish		1 2 0 0 2 2 2	2.3hrs 1each 1each 1each 1each 1each 1each 1each 1each	254.20 28.00 48.00 10.50 9.87 9.87 31.07 28.04 39.29	
	38	Use Cre AH. HBB038/ HB	448 HAH000448 448 HAH000448 587 GGW 1022 587 OETWB1122 587 PWB-1022 S 481 15816746 481 15816748 481 15860024 481 15854457		g ONLY. No hig NAGS Gold Glass Group OETech Precision General Motors General Motors General Motors	Adhesive Blade Blade Blade Moulding Moulding Moulding	2.0 Urethane,Dam,Primer 2.0 Fast-Cure Urethane/Dam/Primer Wiper, 22" (set of 2) Wiper, 22" (set of 2) Wiper, 22" (set of 2) Garnish Garnish Garnish Garnish		1 2 0 0 2 2 2 2 2	2.3hrs 1each 1each 1each 1each 1each 1each 1each 1each 1each	254.20 28.00 48.00 10.50 9.87 9.87 31.07 28.04 39.29 41.33	
	38	Use Cre AH. HBB0380 HB0380 HBB0380 HBB0380 HBB0380 HB0380 HB0380 HB0380 HB0380 HB0380 HB0380 HB0380 HB	448 HAH000448 448 HAH000448 587 GGW 1022 587 OETWB1122 587 PWB-1022 S 481 15816746 481 15816748 481 15860024 481 25854457 482 15816745		g ONLY. No hig NAGS Gold Glass Group OETech Precision General Motors General Motors General Motors General Motors	Adhesive Blade Blade Blade Moulding Moulding Moulding Moulding	2.0 Urethane,Dam,Primer 2.0 Fast-Cure Urethane/Dam/Primer Wiper, 22" (set of 2) Wiper, 22" (set of 2) Wiper, 22" (set of 2) Garnish Garnish Garnish Garnish		1 2 0 0 2 2 2 2 2 2 2	2.3hrs 1each 1each 1each 1each 1each 1each 1each 1each 1each 1each 1each	254.20 28.00 48.00 10.50 9.87 31.07 28.04 39.29 41.33 28.04	

1.10.6 WO Codes

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

		Find WO Code
WO Code		Description
	Find WO Code	Reset
	Add WO Code	
		Find WO Code Window

1.10.6.1 Add WO Codes

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

		WO Codes (New Record)	
WO Code		Description		
	Save	Quit Without Savin	9	
		WO Codes (New	(Record) Window	



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

		WO Codes (New	Record)				
WO Code	WO Code WC Description Waiting on Customer						
	Save	Quit Without Saving	modified				
	Complet	had MO Cadaa (N	and Decement) Minday				

Completed WO Codes (New Record) Window

1.10.6.2 View & Maintain WO Codes

To view and maintain existing WO Codes in your system:

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

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

Find WO Code Window

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

Microsoft	Internet Explorer 🖪 🗙
2	Delete this RO Code?
0	K Cancel

Delete WO Code Dialogue Box

1.10.7 Invoice Codes

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

Find Invoice Code						
Code	Description					
[Find Invoice Code Reset					
[Add Invoice Code					

Find Invoice Code Window

1.10.7.1 Add Invoice Codes

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

Invoice Codes (Ilew Record)							
Invoice Code		Description					
	Save	Quit Without Saving					
	Invoice Codes (New Record) Window						

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

Invoice Codes (Ilew Record)						
Invoice Code RJI Description Rejected Invoice						
Save Quit Without Saving modified						
Completed Invoice Codes (New Record) Window						

1.10.7.2 View & Maintain Invoice Codes

To view and maintain existing Invoice Codes in your system:

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

	Find Invoice Code						
Code	Description						
F	Find Invoice Code Reset						
1	Add Invoice Code						

Find Invoice Code Window.

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

	Find Invoice Code	
Invoice Code	Description]
Fi	nd Invoice Code Reset	
Invoice Code	e Invoice Code Descriptio	m
PP	Processed for Payment	-
RJI	Rejected Invoice	
RPI	Replacement Invoice	
RS	Resubmitted	<u>·</u>

Invoice Code List

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

his Invoice Code?
Cancel

Delete Invoice Code Dialogue Box

1.10.8 Reports

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

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

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

GroupName	
Scheduing	
Sales	=
Productivity	
Administrative	
Terr	

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

GroupName	
Accounting	^
Scheduling	6
Sales	
Productivity	×
ReportName	
1. PERIODIC PAYMENT REPORT	~
2. TRUE AGING	
3. PAYMENT REPORT	
4. ADJUSTMENT REPORT	×

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

	GroupNa	me	
	Account	ing	<u>^</u>
	Schedul	ing	
	Sales	1	
	Productiv	vity	~
	ReportNa	ime	
	1. PERIODIC PAYM	ENT REPORT	~
	2. TRUE AG	GING	ā
	3. PAYMENT P	REPORT	
	4. ADJUSTMEN	T REPORT	~
Date 04/08/2005	To Date 04/15/2005	or NA	~

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

× 🚳 🏝 🛷 T= 10	00% •	1 of	1 → >: = []d	4				Crystal •
	Top C Glass Report: AR-1085P PERIODIC PAYMENT REPORT Date: 08-April-2005 From 4/8/2004 To 4/9/2005 Time: 1:39-07PM						1	
	<u>Trans #</u> <u>Trans Date</u> 76 08/31/2004	<u>Acot#</u> 4247	Account Name STATEWIDE MUTUAL	<u>Check# or</u> <u>Bankcard#</u> VISA	Paid Inv 3396	<u>(n voice Ba)</u> \$538.92	Deposit Amount (\$50.00)	
	TOTAL PAYMENTS	5:				\$538.92	(\$50.00)	

Reports Window

1.10.8.1 Printing Reports

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



Report Viewer Toolbar

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

Select Player	<u> </u>
Auto Acrobat Auto Canon Auto HP Distiller on SS20 on LaserJet 41	Carton SS20 HP Laster Jet on GREEN2 4100 PCL 6
Statur: Reads	E Diet to file Deferences
Location: Comment	Find Printer
Page Range	·
C Selection C Current Page	Number of copies: 1 🚔
C Pages: 1	E Colste
Enter either a single page number or a single page range. For example, 5-12	ختار التقار

Print Dialogue Box

1.10.8.2 Exporting Reports

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

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

X 🚳 🕭 🛷 T= 100% 💌	€ € 1 of 1	▶ ⊨ = 🗚 Crystal 📀
Preview		



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

Export Report	EX
File Format :	
Microsoft Word 💌	
Crystal Reports Microsoft Excel Microsoft Excel (Data Only)	
Microsoft Word Rich Text Format Adobe Acrobat	
From : 1 To : 1	
Ele name:	
OK Cancel Bro	wse

Export Report Dialogue Box

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

1.10.9 QuickBooks Setup

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

1.10.10 Bulk Invoice Notes

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

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

Bulk Invoice Notes			
Insurance Company	Date From	Date To	
Reset			
-			

Bulk Invoice Notes Window

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

Bulk Invoice Notes			
Insurance Company Statewid	e Mutual Date From	Date To	
Find Reset			
Company	Address	City	State
STATEWIDE MUTUAL	1515 ROCKEFELLER PLAZA	NEW YORK	NY
		-	

Bulk Invoice Notes Selection Screen

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

Insurance Co Find	mpany Statewide Mutual D	ate From 01/06/2007	Date To 09/	05/2007
Owner	Insurance	Invoice	Invoice Date	Amount
ony test	STATEWIDE MUTUAL	291775	02/21/2007	\$505.94
nel smith	STATEWIDE MUTUAL	300470	03/07/2007	\$492.71
ony morales	STATEWIDE MUTUAL	300538	03/07/2007	\$492.71
be slow	STATEWIDE MUTUAL	323337	04/11/2007	\$405.76
faria lorio	STATEWIDE MUTUAL	316911	04/02/2007	\$235.00
ony morales	STATEWIDE MUTUAL	312793	03/26/2007	\$462.12
faria lorio	STATEWIDE MUTUAL	406925	08/13/2007	\$866.54
Noice Statewide be paying	Mutual included the kit price in the c the kit separately from 9/6/07 on.	ost of the windshield fr	om 1/6/07 to 9/5/07.	They will

Bulk Invoice Notes List

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

1.10.11 Contact Export

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

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

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

Find Contacts				
			Sales Person	Invoice Code
No Markets	No Regions		All Sales People Dave Sales	Al Invoice Codes A CB CB CC
			Include Exclude 🔿	Include@ Exclude@
	Invoice Status Invoice	•	Invoice Type 🔘 All 🔘	Repair 🔘 Replacement
Start Date 05/01/2012	End Date 05/31/2012	2	Create File	Reset

Contact Export Parameters Window

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

File Download - Security Warning
Do you want to open or save this file?
Name: edgContactExport.xls Type: Microsoft Office Excel 97-2003 Worksheet, 2.95 KB From: live.edirectglass.com Open Save Cancel
While files from the Internet can be useful, this file type can potentially harm your computer. If you do not trust the source, do not open or save this software. What's the risk?



2 eDirectGlass Basics

2.1 Overview

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



2.1.1 Quotes & Invoicing

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



Quotes and Invoicing Sub Menu

New Assignments

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

Quick Quote

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

Quotes

Allows you to enter new quotes or manage existing quotes.

Work Orders

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

Scheduling

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

Invoicing

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

*NAGS is the registered trademark of Mitchell International.

2.1.2 Message Center

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



Message Center Sub Menu

Check Messages

Allows you to check for 'New' messages.

Create Message

Allows you to create a 'New' message.

Inbox

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

Outbox

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

Sent Items

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

Trash

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

*The business partner must also be an eDirectGlass user.

2.1.3 C & V Relationship Mgmt

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



Owner Contact

Manage your Owner contact records.

Insurance Contact

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

Agent Contact

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

Other Contact

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

2.1.4 Marketing

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



Owner Marketing

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

Agent Marketing

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

Fleet/Ins Marketing

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

Marketing Reports

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

2.1.5 Accounting

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



Post Payment

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

Adjustments/Credits

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

Closed Invoices

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

Invoices for QB

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

Payments for QB

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

Invoice XML Export

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

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



3 Quotes & Invoicing

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

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

Owner	Bill To	Agent	Loss Info	Vehicle	Schedule	All
		Quoting	& Invoicing Ta	sk Menu		

Owner

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

Bill To

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

Agent

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

Loss Info

Displays the Loss information with regards to the claim.

Vehicle

Displays the Vehicle information including the parts and pricing information.

Schedule

Displays the Schedule information for the claim.

All

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

3.1 New Assignments

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

New Assignment Sub Menu

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



New Assignment Sub Menu

Print Assignment

Allows you to print all of the Assignment information.

Accept

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

Accept & Save

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

Reject

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

3.1.1 Review Assignments

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



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

Year	Make	Model	Owner	Insurance
2003	Chrysler	Concorde	Manny Thomas	STATEVIDE MUTUAL
2004	Lincoln	Aviator	Cori Rooney	First Insurance of Garyland
	2003 2004	2003 Chrysler 2004 Lincoln	2003 Chrysler Concorde 2004 Lincoln Aviator	Teal Make Model Owner 2003 Chrysler Concorde Manny Thomas 2004 Lincoln Aviator Cori Rooney

New Assignments List Window

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

Reviewing Assignment

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

Owner	Insurance	Agent	Loss Info	Vehicle	Schedule	I.A.
Owner (Commercial					Owner <<
First Name	Tom	Middle		Pri	mary Phone (480) 655-4343
Last Name	Herns	Prefix	Suffix	Secon	dary Phone	
Address	10997 N 113th Ave			M	obile Phone	
Address2					Fax	
City	SCOTTSDALE 🛛 🔽	State AZ	Zip 85259	9		
Email				84	odified Save	Undo
Store		Sales Person	select one	~		
Bill to (Insurance		Campaign		×	

Assignment Review with Active Task Menu

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

accept or reject the assignment.

3.1.2 Accept Assignment

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

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

Accept & Save

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

3.1.3 Reject Assignment

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

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

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

Please enter th	e reason for rejecting this	Assignment
		-
		-
Cause and Rei		
paye and ne	undo Cancel	

Reject Reason Alert Box

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

3.1.4 Show O&A Rules

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

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

O&A Parameters Screen

3.2 Quick Quote

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

Make		
kura		
ivanti M	VIN Number:	Show Parts Save Vehicle
	Glass Part # Part #	

Quick Quote Lookup Vehicle Window

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

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



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

Pricing Catalogue		Pricing Profile	e			
Mygrant su	pplier cost LIVE	Included Mygrant	-			
Glass ID	1991 Audi 80 4	Door Sedan Quattro	Dimension	Graphic	Info	
FW00642	Windshield, Antenna		37 x 57	View		
FQ03688	Quarter, Right		15.8 x 21.7	View		
FQ03689	Quarter, Left		15.8 x 21.7	View		=
FD03684	Door, Right, Front		22 x 38	View		11
FD03685	Door, Left, Front		22 x 38	View		
FD03686	Door, Right, Rear		22 x 28	View		
FD03687	Door, Left, Rear		22 x 28	View		-

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

FW00642GGNN FW00642GGNY	M M	3	\$106.4	0	
THING CLOCKING		3	\$106.4	0	^
28006426683	P	28	\$357.8	5	
FW00642GGNN	₽	28	\$357.8	5	

When the sub-parts list is displayed, any parts that are found in your pricing Catalogue (or matched

with a Supplier Live Cost Plus Pricing profile) will be shown with the Price highlighted in the color blue and in the Vendor column, it will display the name of the Pricing Profile used to calculate the price.

Quotes & Invoicing	Message C	enter C&V Rel	ationship Mgmt 🚺	Marketing V	Accounting Admi	inistration eLo	unge
Quotes & Invoicing	Owner	BILTO	Agent	Loss Info	Vehicle	Schedule	AL
New Assignments	Glass ID		2007 Toyota Ca	mry 4 Door Se	dan	Dimension	Graphic
Quick Quote	FW02627	Windshield, W/Third	d Visor Frit, Solar Co	ated		39 x 58.3	View _
Quotes	FW02628	Windshield, Electro	chromic Mirror, W/Th	ird Visor Frit, So	lar Coated	39 x 58.3	View
Work Orders	FV22933	Vent, Right, Rear, S	Solar Coated			11 x 14.5	View E
Scheduling	FV22934	Vent, Left, Rear, Se	olar Coated			11 x 14.5	View
Invoicing	FD22929	Door, Right, Front,	USA Built, Solar Coat	ed		20 x 36.5	View
	FD22930	Door, Left, Front, U	SA Built, Solar Coate	d		20 x 36.5	View
My Work	FD22931	Door, Right, Rear, S	Solar Coated			17 x 24.5	View _
	ED0002 Dear Left Dear Selar Central 17 v 24 5 12mm						
	O Part	Id MFG Part	Color Vendor	Description	Qual	RefQty U	nit Price
	3 FW026	27 FW02627GBYN	IGBN Retail A	Windshield		1 3.3hr	s 178.32 A
	FW026	27 56101-06170	GBY Toyota	Windshield		1 3.3hr	s 1,008.54
	HAH00	0004HAH000004	Retail A	Adhesive	2.0 Urethane, Dam, Prim	er 1ea	ich 70.00
	- 40HAH00	0448HAH000448	Retail A	Adhesive	2.0 Fast-Cure Urethane/Dam/Primer	1 ea	ich 70.00
	нввоз	8684 GGW 1020	Gold Glass Group	Blade	Wiper, 20"	0 1ea	ich 8.65
	HBB03	8684 PWB-1020 S	Precision	Blade	Wiper, 20"	0 1ea	ich 8.15
	П НВВ03	3689 GGW 1024	Gold Glass	Blade	Wiper, 24"	0 1ea	ch 13.25

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

Cars that use glass DW01224	
1996 Chrysler Town & Country Mini Van	^
1996 Dodge Caravan Mini Van	
1996 Dodge Grand Caravan Mini Van	-
1996 Plymouth Grand Voyager Mini Van	
1996 Plymouth Voyager Mini Van	
1997 Chrysler Town & Country Mini Van	
1997 Chrysler Town & Country Mini Van SX	
1997 Dodge Caravan Mini Van	
1997 Dodge Grand Caravan Mini Van	
1997 Dodge Grand Caravan Mini Van SE	
1997 Dodge Grand Caravan Mini Van ES	~
Naw Casesh	<u></u>

Glass Part # Associated Vehicles Lookup

*NAGS is the registered trademark of Mitchell International.

3.2.1 Working with a NAGS Lookup

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

Glass ID	1991 Audi 80 4 Door Sedan Quattro	Dimension	Graphic	
FV/00642	Windshield, Antenna	37 x 57	View	
FQ03688	Quarter, Right	15.8 x 21.7	View	
FQ03689	Quarter, Left	15.8 x 21.7	View	
FD03684	Door, Right, Front	22 × 38	View	
FD03685	Door, Left, Front	22 × 38	View	
FD03686	Door, Right, Rear	22 × 28	View	
FD03687	Door, Left, Rear	22 × 28	View	-

Initial Vehicle Parts Window

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



Part Graphic

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

3.2.2 Converting a Lookup to a Quote

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

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

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

In addition to the total, the <u>Convert to Quote</u> button will appear.

If you wish to convert the NAGS lookup to a Quote, simply click the <u>Convert to Quote</u> button and you will be taken to the Quotes feature to complete the process. Any discounts you have entered in the <u>Discount</u>: <u>box will be carried over to the Quote</u>.
	Glass ID		199	1 Audi 80 4 Doo	r Sedan Qu	attro	Dir	nens	sion G	iraphic
FV	V00642	Windshield, Antenn	a				37 :	x 57		View
FO	03688	Quarter, Right					15.	8 x 21	1.7	View
FO	03689	Quarter, Left					15.	8 x 21	.7	View
FD	03684	Door, Right, Front	22	x 38	Ē	View				
FD	03685	Door, Left, Front					22	x 38	Ē	View
FD	03686	Door, Right, Rear					22	x 28	Ē	View
FD	03687	Door, Left, Rear					22	x 28	T T	View
FB	03690	Back Window, Qua	ttro, He	eated			35.	3 x 51	1.5	View
FB	03814	Back Window, Ante	nna. H	leated			35.	3 x 51	1.5	View
			la .	1	-					
느	Part Id	MFG Part	Color	Vendor	Description	Qual		RefC	ity Unit	Price
$\overline{\mathbf{A}}$	FW00642	FW00642GGNN	GGN	NAGS	Windshield			13	3.5hrs	834.85
Г	FW00642	FW00642GGNY	GGY	NAGS	Windshield			13	.5 hrs	1,045.65
Г	FW00642	893 845 099 K	GGN	Audi- Volkswagen	Windshield			13	3.5hrs	315.18
Г	HAH000004	HAH000004		NAGS	Adhesive	2.0 Urethane, Dam, Primer			1each	28.00
•	HAH000448	HAH000448		NAGS	Adhesive	2.0 Fast-Cure Urethane/Dam/Primer			1each	48.00
Г	HCR000172	893 853 367 E 2ZZ		Audi- Volkswagen	Cover	Chrome, Joint		0	1each	5.88
Г	HCR000173	893 853 367 F 01C		Audi- Volkswagen	Cover	Black, Joint		0	1each	0.92
Г	HML006980	893 845 121 G		Audi- Volkswagen	Moulding	Rubber		0	1each	48.33
Г	HML006981	893 867 232 R01		Audi- Volkswagen	Moulding	Inner, Garnish		0	1each	42.15
Г	HML006983	893 867 231 R01		Audi- Volkswagen	Moulding	Inner, Garnish		0	1each	41.50
Г	HML008098	DK926		Dorcas & Kalam	Moulding			0	1each	53.60
	HML008098	DK927		Dorcas & Kalam	Moulding			0	1each	132.36
	HML008098	WKT 586 B		Precision	Moulding			0	1each	47.38
E	HML008098	WKT 586 C		Precision	Moulding			0	1each	115.21
Г	HMR000484	443 857 511 01C		Audi- Volkswagen	Mirror	Rear, View		0	1each	13.30
Г	HPL000204	4A0 845 543		Audi- Volkswagen	Plate	Retainer, Mirror		2	1each	13.35
Г	HSC000418	443 845 237 B		Audi- Volkswagen	Spacer	Upper (set of 4)		3	1each	0.58
Г	HSC000419	443 845 237 D		Audi- Volkswagen	Spacer	Lower (set of 3)		4	1each	1.20
Г	HWE000002	2443 845 631 A		Audi- Volkswagen	Wedge			5	1each	1.20
	Disco	ount: 85%				Convert to Quote		То	tal \$132	.43

Lookup NAGS Line Item Build

3.3 Quotes

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



New Quote

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

3.3.1 Quote Lookup

66

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

Find Existing Quo	te		
Date	Owner	Insurance	
Year	Phone	Claim No	
Make	ZIP	Quote Number	
Model	VIN		
Find Existing Quote	e Reset Yo	u may enter partial data in one or multiple fields	

Find Existing Quote Window

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

Date	Year	Make	Model	Owner	Insurance
03/11/2004	2002	Mitsubishi	Lancer	Barry White	STATEWIDE MUTUAL
03/11/2004	2002	Mtsubishi	Lancer	Clyde Barker	STATEWIDE MUTUAL
03/10/2004	2002	Mtsubishi	Lancer	Cary Elwes	STATEVIDE MUTUAL
03/04/2004	2002	Mitsubishi	Galant	Diana Ross	First Insurance of Garyland
03/04/2004	2001	Mercedes Benz	SLK230	Gordon Lightfoot	STATEWIDE MUTUAL
03/02/2004	2001	Saturn	L300	Charles Xavier	First Insurance of Garyland
02/26/2004	2004	Saturn	lon	Larry Mullen	
02/24/2004	2003	Isuzu	Rodeo Sport	April Levine	First Insurance of Garyland
02/18/2004	2002	Chevrolet	Cavalier	Tanner Williams	
01/20/2004	2003	Toyota	RAV4	Eddie Dean	STATEWIDE MUTUAL
0.11					
Hemeve Que	ote	10 Records			

Quotes Retrieve Window

3.3.1.1 Quotes List Color Coding

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

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

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

3.3.2 Create a New Quote

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

3.3.2.1 Entering Owner Information

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

Owner	hsurance	Agent	Loss Info	Vehicle	Schedule	Al
Owner O 0	Commercial				New Ow	mer Record <
First Name		Middle		F	rimary Phone	
Last Name		Prefix	Suffix	Seco	ondary Phone	
Address					Mobile Phone	
Address2					Fax	
City	×	State	Zip			
Email					Sav	Undo
Store		Sales Pers	on select one	~		
Bill to 🗭 O	wher Clinsurance	C Other	Campaign		~	

New Owner Record Window

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

Owner	Insurance	Agent	Loss Info	Vehicle	Schedule	AI
💿 Owner 🔿 🔿	ommercial				New Ov	vner Record <<
First Name		Middle			Primary Phone	
Last Name		Prefix	Suffix	Se	condary Phone	
Address					Mobile Phone	
Address2					Fax	
City	~	State	Zip			
Email					Modified Sa	ve Undo
Store		Sales Pers	on Tom Salesguy	*		
Bill to C O	wher Clinsurance	e 🛈 Other	Campaign		~	
🕤 Individual 🔘	Company					Bill to
First Name		Middle		Pri	mary Phone	
Last Name		Prefix	Suffix	Secon	dary Phone	
Address				M	obile Phone	
Address2					Fax	
City		State	Zip			
Email						

New Owner Record Window - Bill To Other

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

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

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

Owner 🔿 Commercial			New Owner Record
First Name Grey	Middle		Primary Phone (480) 995-6566
Last Name Sanders	Prefix	Suffix	Secondary Phone
Address			Mobile Phone
Address2			Fax
City SCOTTSDALE	 State AZ 	Zip 85258	3
Email			Modified Save Undo
Store	Sales Person	select one	×
Bill to C Owner @ Insura	nce C Other	Campaign	~
Copy Sanders Grey			
Account: Santano, Carlos			
Santana, Carlos			
Sanders, Vernon			

Copy Account Drop-Down

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

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

3.3.2.2 Entering Bill To Information

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

Find Company	Coverage Code		Insurar	nce Information	
Company Name S Show Contract Companie Find Company Reset	e Custom Collision Custom Compr. Collision Comprehensive	•	Policy Deductible Claim No Authorization Referral No Loss Date		
Fleet Information			Loss Time		
Unit #	St	ate w	where occurred?		
Card #		W	ho was driving?		
Expiration Date	Insured th	he re	gistered owner?	@ Yes ⊘ No	
Driver Name	Description of Incid	lent[
Driver License		- 1			
Fleet PO #		- L			-
	No	tes			~
	Save Undo				

Bill To Task Menu Window

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

Owner	Bill To	Agent	Loss Info	Vehicle	Schedule	All
		Quotes	and Invoicing T	Fask Bar		

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

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

Insurance Company Selection List

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

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

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

Owner	Insurance	Agent	Loss Info	Vehicle	Schedu	de l	Al
						Insur	ance <
CTAT			Coverage	Code	Policy	178559	
STATEWIDE MUTUAL 3965 South Rd Suite W					Deductible	50.00	
			Custom Collision	ion	Claim No	58996547f	
Baltino	xe MD 21209		Collision	pr	Authorization	54268	
(400).	940-1112		Comprehens	ive 💌	Referral No	598652	
					Loss Date	02/17/2004	
			Save Und	2			
		,	T / 14	D / 11			

Insurance Task Menu Detail

3.3.2.2.1 Change Insurance Company

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

Owner	Insurance	Agent	Loss info	Vehicle		Schedule	All	
							1	Insurance -
-				Coverage Code	•	Policy	178559	
Find	Insurance Compa			~	Deductible	50.00		
Comp	pany Name	Sta	·	stom Collision	÷.	Claim No	589965471	
	Show 2	O&A Insurance Co	ompanies C.	stom Compr.	2	Authorization	54268	
F	ind Insurance Comp	any Reset	Č	mprehensive	×	Referral No	598865	
					_	Loss Date	02/17/2004	
						Loss Time		
				5	State	where occurred?		
					1	Who was driving?		
				Insured	the n	egistered owner?	⊙Yes ONo	
			De	scription of Inci	dent			~
								-
modified			Se	ve Undo	l			<u>×</u>

Insurance Task Menu Window - Change Insurance

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

3.3.2.3 Agent Information

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

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

3.3.2.3.1 From Agency or TPA

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

Owner	Insurance	Agent	Loss Info	Vehicle	Schedule	AI
						Agent <<
Big Claims 4545 Adjuster W North Pole AZ 85 (480) 346-1112 P	ay 258 'hone					

Agent Information Window

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

O&A Parameters for Bi	g Claims						
Domestic Windshield	50%						
Foreign Windshield	50%						
Domestic Tempered	50%						
Foreign Tempered	50%						
First Repair	\$65.00						
Additional Repair	\$10.00						
Labor Flat	\$0.00						
Labor Hourly	\$20.00						
Other Kit Flat	\$21.50						
Adhesive Highmod/Non-Condu	ictive Urethane						
1.0 Kit Flat	\$30.00						
1.5 Kit Flat	\$40.00						
2.0 Kit Flat	\$50.00						
2.5 Kit Flat	\$60.00						
3.0 Kit Flat	\$70.00						
Remarks							
O&A Parameters for Big Claims Domestic Windshield 50% Foreign Windshield 50% Domestic Tempered 50% Foreign Tempered 50% First Repair \$65.00 Additional Repair \$10.00 Labor Flat \$0,00 Labor Hourly \$20.00 Other Kit Flat \$21.50 Adhesive Highmod/Non-Conductive Urethane 1.0 Kit Flat \$30.00 1.5 Kit Flat \$40.00 2.0 Kit Flat \$60.00 3.0 Kit Flat \$70.00							
Change OR A Dulas I	Ninday						

Show O&A Rules Window

3.3.2.3.2 Referral Agents

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

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

Owner	Insurance	Agent	Loss Info	Vehicle	Sch	edule Al	
						Age	ent <<
No Agent			5	Select Agent	Jiffy Lube 1		~
			Se	lect Contact	Barretta Byrd		~
						Save Und	lo ion

Agent Tab

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

Owner	Insurance	Agent	Loss Info	Vehicle		Schedule	Al	
No Agent			s	Select Agent elect Contact	Dirt B Dirt B Quiky Toriys	Gone Car Wash Gone Car Wash Gone Car Wash Mart Lube & Oil Lube & Oil - FLW	Agent N 100h V N 100h St Shea	<<
		Δ.	aont Salaat	ion				

Agent Selection

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

Owner	Insurance	Agent	Loss Info	Vehicle	Schedule	Al	
						Agent	t <<
No Agent				Select Agent	Dirt B Gone Car Wa	ash - N 100th : 💌	
			Loss Info Vehicle Schedule All Agent Select Agent Dit B Gone Car Wash - N 100th : Select Contact Ronnie Seam Timmy Taylor Save Undo				
					Timmy Taylor		
						Save Undo]
		Co	ntact Selec	ction			

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

3.3.2.3.3 Apply Commission

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

Owner Insurance	Agent	Loss Info	Vehicle	Sche	dule	IA.	
						Agent	<<
No Agent			Select Agent	Jiffy Lube 1		~	
		S	elect Contact	Barretta Byrd		~	
					Save Apply Con	Undo	
Sales Commissions				_			
Sales	#1 select sales	person	~	Amount	\$0.00		
Sales	#2 select sales	person	~	Amount	\$0.00		
Wri	ter select sales	writer	*	Amount	\$0.00		

Sales Commissions Screen

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

3.3.2.4 **Entering Loss Info**

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

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

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



3.3.2.5 Entering Vehicle Information

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

					Vehicle <<				
	Ticket#			WO#	37403332161				
	Ticket Date								
	VIN				not coded 🛛 💌				
	License		State		Invoice Code / History				
Lookup Vehicle 🔻	Mileage		Color						
			Save Un	do					
Vehicle Tab Screen									

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

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

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

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



Vehicle Build Window

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

3.3.2.5.1 Custom Vehicle Information

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

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

				Vehicle <<
	Ticket#		W0#	37403332161
Tic	ket Date			
	VN			not coded 🛛 💌
	License	State		Invoice Code / History
Lookup Vehicle Add Custom Vehic	Mileage	Color		
No Vehicle		Save	Jndo	
Add Custom Vehicle		o		

Vehicle Tab (Add Custom Vehicle)

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

Owner	Insurance Agent		Loss	info	Vehicle	Schedule	All	
Make	Make Model		Year	ear Body Style		Submode	el	
VIN Number: 5	B4MP6/G133	367517	Save U	ndo				
		Add Ci	ustom \	/ehicl	e Screen			

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

Microso	ft Internet Explorer 🛛 🖪 🔯
2	The NAGS database was unable to locate the following: Workhorse Custom Chassis Forward Control Model 2003 Motor Home N/A Do you want to use this data to create a custom vehicle?
	OK Cancel

Custom Vehicle VIN Decoded Dialogue Box

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

Owner	Insurance	Agent	Loss Info		Vehicle	Schedule	AI		
Make	Make Model		Year	Year Body Style		Submod	el		
WORKHORSE CU	STOM C FORW	RD CONTROL MO	2003	03 MOTOR HOME		N/A			
VIN Number: 5B4MP67G133367517 Save Undo									
Completed Add Custom Vehicle Screen									

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

										Vehicle	<<	
			Ticket#				V	VO# [3 740 3	332161		
			Ticket Date								- 1	
2	2003		VIN	5B4MP	67G1333	67517			not c	oded 🔻	Г — I	
V	VORKHORSE (USTO FORWARD		Valid VI	N						· 1	
	ONTROL N/A		License			State		In	voice C	ode / History	,	
Î Î	Lookup Veh	icle	Mieage		_	Color						
						Sa	ve Und	_			- 1	
						08	vie uno	<u> </u>				
Own	er Inv	ins/Fleet inv										
		Glass ID			Desc	ription		Dimer	nsion	Invoice	<<	
										No Invoice#	-	
0		Part Id		Des	scription	Qty Un	it List	08A	Disc	Net	Tax	
Catalogue			-	Profile				-				
			_				-			EA 🔻		
Category			▼ De:	scription			1			Jnit	Taxa	ble 🔽
Part Id	Select one		-	Position					List Pr	ice		-
ld Tune	NACE -			Fasture					Disco			-
U Type	10405			Color		-			Net D	dire	_	- 11
HI-G Part				Color		_			ALC: PI			
LOUNO				aiy					0			
							E	save	Cancel			

3.3.2.5.2 No Vehicle Information

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

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

Custom Vehicle.

				Vehicle <<
	Ticket#		WO#	37403332161
	Ticket Date			
	VIN]	not coded 🛛 💌
	License	State		Invoice Code / History
Lookup Vehicle No Vehicle M	Mileage	Color		
No Vehicle		Save	do	
Add Custom Vehicle	· · · /	() () ()() () ()(

Vehicle Tab (No Vehicle)

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

Owne	er Inv	Ins/Flee	e Inv									
		Glass ID			Desc	ription		Dime	nsion	Invoice	. <<	
										No Invoice	#	
0		P	art Id		Description	Qty Uni	t List	08A	Disc	Net	Tax	
Catalogue			-	Pro	file			-				
Category				Descript	ion		1			EA •	Taxa	ble 🔽
Part Id	Select on	e		Posit	ion	•			List Pr	ice		
ld Type	NAGS -			Feat	ire	-			Disco	unt		
MFG Part				Co	lor				Net Pr	lice		
Lot No				(2ty				0	8A 🕅		
								Save	Cancel			

3.3.2.5.3 Selecting Parts

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

Glass ID	2002 Chevrolet Cavalier 2 Door Coupe	Dimension	Graphic	
DV/01191	Windshield, encapsulated	36 × 57	View	
DV/01269	Windshield, encapsulated, Solar Coated	36 x 57	View	
DQ08934	Guarter, Right, Paint To Match, encapsulated	15.7 x 32.8	View	
DQ08935	Guarter, Left, Paint To Match, encapsulated	15.7 × 32.8	View	
DQ08990	Guarter, Right, W/O Painted Applique	15.7 x 32.8	View	_
DQ08991	Guarter, Left, W/O Painted Applique	15.7 x 32.8	View	
DD08648	Door, Right, Front, 2 Holes	20 × 42.5	View	•



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

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

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

	Part Id	MFG Part	Color	Vendor	Description	Qual	Ref	Qty	Unit	Price		
7	DW01191	DW01191GBYN	GBN	NAGS	Windshield		1	2.3	hrs	777.10		
Г	DW01191	DW01191GTYN	GTN	NAGS	Windshield		1	2.3	hrs	700.80		
Г	DW01191	22658130	GTY	General Motors	Windshield		1	2.3	hrs	214.55		
Г	HAH000004	HAH000004		NAGS	Adhesive	2.0 Urethane, Dam, Primer		1	each	28.00		
7	HAH000448	HAH000448		NAGS	Adhesive	2.0 Fast-Cure Urethane/Dam/Primer		1	each	48.00		
Г	HLU000001	HLU000001		NAGS	Lubricant	Encapsulation Lubricant		1	each	20.00		
7	HMT000025	20626174		General Motors	Mount	Mirror	2	1	each	10.65		
	Discoun	t				Add Items to Quote	To	tal \$	835.7	5		
	Part Type Line Items											

3.3.2.5.3.1 Adding Additional Parts

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

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

				E RECEIVERING	~
2	002 Chevrolet Ca	walier 2 Door Co	upe	Dimension	Graphic
dshield, encapsul	lated			36 x 57	View
dshield, encapsul	lated, Solar Coated			36 x 57	View
rter, Right, Paint 1	To Match, encapsul	lated		15.7 x 32.8	View
rter, Left, Paint To	o Match, encapsula	ated		15.7 x 32.8	View
rter, Right, W/O P	ainted Applique	15.7 x 32.8	View		
rter, Left, W/O Pa	ainted Applique			15.7 x 32.8	View
r, Right, Front, 21	Holes			20 x 42.5	View
r, Left, Front, 2 H	oles			20 x 42.5	View
k Window, Heate	d			37.8 x 49.9	View
k Window, Paint 8	Band			37.8 x 49.9	View
	dshield, encapsul dshield, encapsul irter, Right, Paint T irter, Left, Paint Tr irter, Right, WiO Pa r, Right, Front, 2 I r, Left, Front, 2 H & Window, Heate & Window, Paint I	dshield, encapsulated dshield, encapsulated, Solar Coated Irter, Right, Paint To Match, encapsul Irter, Left, Paint To Match, encapsul Irter, Right, WIO Painted Applique Irter, Left, WIO Painted Applique r, Right, Front, 2 Holes r, Left, Front, 2 Holes k Window, Heated k Window, Paint Band	dshield, encapsulated dshield, encapsulated, Solar Coated irter, Right, Paint To Match, encapsulated irter, Left, Paint To Match, encapsulated irter, Right, W/O Painted Applique irter, Left, W/O Painted Applique r, Right, Front, 2 Holes r, Left, Front, 2 Holes k Window, Heated k Window, Paint Band	dshield, encapsulated dshield, encapsulated dshield, encapsulated, Solar Coated irter, Right, Paint To Match, encapsulated irter, Left, Paint To Match, encapsulated irter, Right, W/O Painted Applique r, Right, W/O Painted Applique r, Right, Front, 2 Holes r, Left, Front, 2 Holes k Window, Heated k Window, Paint Band	dshield, encapsulated 36 x 57 dshield, encapsulated, Solar Coated 36 x 57 irter, Right, Paint To Match, encapsulated 15.7 x 32.8 irter, Right, WIO Painted Applique 15.7 x 32.8 irter, Left, WIO Painted Applique 15.7 x 32.8 r, Right, Front, 2 Holes 20 x 42.5 r, Left, Front, 2 Holes 20 x 42.5 k Window, Heated 37.8 x 49.9

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

Owner Insurance	. Agent .	Loss Info	Vehicle	30	hetute		Al	
						Ve	chicle	<<
	Ti	cket#		W	0# 339	72506		
2002		VN 1G1JC124	X27203594		n	ot coded	~	
Chevrolet Cavaller	Lic	Stat	e AZ	Invoice	e Code /	listory	' I	
2 Door Coupe	1		Stort	Undo	,			
Loonup Volioio	J ***	eage 22000			(along)			
Glass ID		Dimens	ion Inv	oice	<<			
OW01191	Windshield, encapsul	ated			36 x 5	7		
Part Id	Desc	ription	Qty Unit	List	08A D	isc I	let 1	Tax
DW01191	Windshield GBN		1each	\$777.10	Г	5	777.10	$\overline{\mathbf{v}}$
DW01191	Windshield Labor		2.3hrs	\$50.00	Г	\$	115.00	
HAH000448	Adhesive 2.0 Fas Urethan	st-Cure te/Dam/Primer	1each	\$48.00	Г	:	\$48.00	⊽
DB08654	Back Window GTN		1each	\$181.80	Г	\$	181.80	7
DB08654	Back Window Labor		2.9hrs	\$50.00	Г	\$	145.00	
HAH000004	Adhesive 2.0 Ure	sthane,Dam,Primer	1each	\$28.00	Г	1	\$28.00	$\overline{\mathbf{v}}$
HML009120	Moulding		1each	\$0.00		5	(0.00)	$\overline{\mathbf{v}}$
Convet Quote to BO	New Glass Part	1			Sub	Total \$1,	294.90	
		1				Tax	\$49.17	
Apply Cash Discount					Total Cha	rges \$1,	344.07	
Deductible Disc. \$0.00					Dedu	ctible	\$0.00	
						Total \$1,	344.07	

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

Owner	Insurance	Agent	Loss Info	Vel	hicle	Scr	adale	AI	1
								Vehi	cle <<
			Ticket#	i		WO	# 3397:	2506	
2002			VN 1G1J	124X2720	3594	_	not	coded	~
Chevrole	et Cavalier		1000	100			1		
2 Door C	Coupe		License ASAD	/89	State	AZ	Invoice	Code / Hist	ory
Look	up Vehicle		Mileage 22380				Save	Undo	
									_
Glass	ID		Descrip	tion			Dimensio	n Invoid	;e <<
DW01191		Windshield, enc	apsulated				36 x 57		-
Part	ld	14 find a bialid	Description	Q	ty Unit	List	O&A DIS	sc Net	Tax
0001191		Windshield	Labor	2	3hrs	\$50.00	-	\$115	
ONVITO		Transistingia	2.0 Fast-Cure	-		300.00	-	9113	
HAH000448		Adhesive	Urethane/Dam/Pri	ner	1each	\$48.00	Г	\$48	00 🔽
OB08654		Back Window	GTN		1each \$	181.80	Г	\$181	.80 🔽
DB08654		Back Window	Labor	2	9hrs	\$50.00	Г	\$145	i.00 🔽
HAH000004		Adhesive	2.0 Urethane, Dan	n,Primer	1each	\$28.00	Г	\$28	.00 🔽
HML009120		Moulding			1each	\$0.00		\$(0.	00) 🔽
Convert Quote	to RO	Add Line Edit L	ine Delete Li	ne Add	NAGS Ite	m i	Sub To	otal \$1,294	.90
New Glass Part							1	Tax \$49	9.17
Apply Cash Disc	count					1	Total Charg	jes \$1,344	.07
Deductible Disc. 50	0.00						Deduct	ible \$0	0.00
							Т	otal \$1,344	.07
Part Id	MEG Part C	olor Vendor	Description		Qual		DetC	the line t	rice
C 00001101 000	01101C8VM 0	IAN NARS	Winnahalt		words		1	3hrs 23	0.50
C DW01191 DW	01191GTVN G	TN NARS	Winnahielt				1.2	3 hm 23	0.50
DW01191 226	58130 0	TV General Moto	vrs. Winnfahlehf				1.2	3hm 21	1.55
HAH000004 HA	H000004	NAGS	Adhesive	2.0 Urethane	Dam Prime	er.		1each 2	8.00
HAH000448 HA	H000448	NAGS	Adhesive	2.0 Fast-Cure	Urethane	/Dam/Pri	mer	1each 4	8.00
T HLU000001 HLU	000001	NAGS	Lubricant	Encapsulation	Lubrican	t		1each 2	0.00
HMT000025 206	26174	General Moto	ors Mount	Mirror			2	1each 1	1.41
				Add bens to	Quala	Close] Tota	1 50	00

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

Add Items to Quote button.

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

Owner Insurance	Agent	Los	ss Info	Vel	nicle	St.	hedule		AI	
									Vehicle	<<
		Ticket#				R	0# 33	397250	06	_
2002		VIN	1G1JC124	4X2720	3594		Γ.	. not co	ded 🗸	1
Chevrolet Cavalier		1.1	4040700		C14	47		de / Mintere		
2 Door Coupe		Liberise	(nonorios) state/ne			NG ML	Invoice Code / History			
Lookup Vehicle		Mieage	22380				Sa	ve Ur	ido	
Class ID		0	escription				Dime	neion	Invoice	11
DW01191	Windshield en	d encangulated					36 × 57		involce	22
Part Id	Trindamend, en	Descriptio	n	Qt	v Unit	List	08A	Disc	Net	Tax
DW01191	Windshield	GBN			1each	\$777.10			\$777.10	2
DW01191	Windshield	Labor		2	3hrs	\$50.00	Г		\$115.00	V
HAH000448	Adhesive	2.0 Fast-Cure Urethane/Dam/Primer			1each	\$48.00	Г		\$48.00	V
DB08654	Back Window	GTN			1each	\$181.80	Г		\$181.80	1
DB08654	Back Window	Labor		2	9hrs	\$50.00	Г		\$145.00	V
HAH000004	Adhesive	2.0 Uretha	ne,Dam,Prir	mer	1each	\$28.00	Г		\$28.00	
HML009120	Moulding				1each	\$0.00			\$(0.00)	2
item Type	Description			Un	t EA	Tax	able 🔽	ł.		
Part Id	Position	1	~	List Pric	e					
ld Type NAGS 💌	pe NAGS V Feature			Discour	t					
MFG Part	Colo	r		Net Pric	е					
Lot No	Qty			08/		Save C	ancel			

Vehicle Tab with Private Parts Selection Box

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

3.3.2.5.3.2 Editing & Deleting Parts

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

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

Owner .	Insurance	. Agent	. La	oss info	Vehicle	Sc	netine		Al		
									Vehicle) <<	
			Ticket#			W	0# 33	39725()6	_	
2002			VN 1G1JC124X27203594not coded 🔛								
Chevroi	et Cavalier		License ASAD789 State AZ Invok						te / History	,	
2 Door 0	Coupe			00000			125		da	·	
Look	cup venicie		Meage	22380			240	395, ISA	MM 1		
Glass	: ID			Description			Dime	nsion	Invoice	<<	
DW01191		Windshield, en	capsulated	1			36	x 57			
Part	ld		Descripti	on	Qty Unit	List	08A	Disc	Net	Tax	
DW01191		Windshield	GBN		1each	\$777.10	Г		\$777.10		
OW01191		Windshield	Labor		2.3hrs	\$50.00	Г		\$115.00		
HAH000448		Adhesive	2.0 Fast- Urethane/	Cure Dam/Primer	1each	\$48.00	Г		\$48.00	.⊾	
HMT000025		Mount	Mirror		1each	\$11.41			\$11,41	I 🔽	
DB08654		Back Window	GTN		1each	\$181.80			\$181.80	₹(
OB08654		Back Window	Labor		2.9hrs	\$50.00	Г		\$145.00	V	
HAH000004		Adhesive	2.0 Ureth	ane,Dam,Prime	r 1each	\$28.00	Г		\$28.00		
HML009120		Moulding			tjeach	\$0.00			\$(0.00)		
Convert Quote	to RO Ad	id Line Edit	Line 0	elete Line	Add NAGS	tem	S	ub Total	\$1,306.31	1	
New Glass Part								Tax	\$49.68	3	
Apply Cash Dise	count						Total 0	Charges	\$1,355.99	9	
Deductible Disc. 5/	0.00						De	ductible	\$0.00	0	
								Tota	\$1,355.99	э	

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

Owner Insurance	Agent	Loss Info	Vehicle	30	hedule .	AI			
						Vehicle <<			
		Ticket#		W	0# 339725	06			
2002		VIN 1G1JC124X2	7203594		not c	not coded 🛛 😒			
Chevrolet Cavalier		1010200				4			
2 Door Coupe		License ASAD789	State	RZ	Invoice Co	de / History			
Lookup Vehicle		Mieage 22380			Save	ndo j			
Glass ID	1	Description			Dimension	Invoice cc			
DW01191	Windshield, en	cansulated			38 x 57	intoice [55			
Part Id		Description	Oty Unit	List	O&A Disc	Net Tax			
DW01191	Windshield	GBN	1each \$	777.10	Г	\$777.10 🔽			
DW01191	Windshield	Labor	2.3hrs	\$50.00	Г	\$115.00 🔽			
HAH000448	Adhesive	2.0 Fast-Cure Urethane/Dam/Primer	1each	\$48.00	Г	\$48.00 🔽			
HMT000025	Mount	Mirror	1each	\$11.41		\$11.41 🔽			
DB08654	Back Window	GTN	1each \$	\$181.80		\$181.80 🔽			
DB08654	Back Window	Labor	2.9hrs	\$50.00	<u> </u>	\$145.00 🔽			
HAH000004	Adhesive	2.0 Urethane, Dam, Primer	1each	\$28.00	Г	\$28.00			
HML009120	Moulding		1jeach	\$0.00		S(0.00)			
		Save Cancel	1 2	3.35		\$23.35			
New Glass Part					Ta	x \$49.68			
Apply Cash Discount					Total Charge	s \$1,355.99			
Deductible Disc. \$0.00					Deductibl	e \$0.00			
					Tota	sl \$1,355.99			

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

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

3.3.2.5.4 Changing Vehicle

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

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

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



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

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

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

0	Owner	Bil	I To	Agent	Loss Info		Vehicle		Schedu	life -	Al		
												Vehic	ie <<
					Tick	et#			1	NO#	37403	331641	_
					Ticket Dr	ste							
	2002					M 1011015	AV275	203604				- 4 - 4	-
	Chevro	let Cava	lier			1615612	9/12/14	203034			not (coded	•
	2 Door	Coupe			Licen	se ASAD789)	State AZ		li i	voice C	ode / Histo	ry
	Loc	kup Veh	icle		Milea	oe 22380	_	Color Gr	een				
						30 22000							
	Save												
	Quener law												
<u> </u>	Class	- 10	11120-10	PRES THE P		Description				Dime	nelon	Invoice	
DIAID	Glass ID			Vindshield encapsulated						20	1131011	No Invoice	
0	D	art Id	THE O	usriielu, ei	Descri	intion		Oty Unit	List	084	Disc	Not	Tav
	DW01101	artis	Wie	dehield	Good	BN SN		1 each	\$254.25	Van U	75%	\$63.4	1 an
-	LABOD		Wie	dehield	9	abor		2 3 hre	\$254.25	TT I	1076 flat	\$135.0	
-	CADOR			daniciu	2	0 East Cura		2.51113	303.00	1×	THE A	9100.0	, vo
34	HAH00044	8	Adr	nesive	Ű	ethane/Dam/P	rimer	1each	\$48.00	∇	flat	\$50.0	NO 17
	0.4	d Line	New	Class Dart		Check Invento	ou/Order			S	ub Tota	\$248.5	6
	~	u Line	INEW	Jidas Pari		Check Invento	worde	5			Tax	\$1.7	0
				Payment/	Adjustme	nt				Total (Charges	\$250.2	26
Deduc	ctible Disc.		S0.00							De	ductible	\$0.0	0
T Ap	ply Cash Dis	scount		Override O	8.A						Total	\$250.2	26
					Rebs	ite: 2 Omaha S	iteaks						
	Submit to MGC Convert Quote												

Complete Vehicle Information Window

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

3.3.2.5.5.1 WO Number

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

0)wner	Bill	To	Agen	nt	Loss Info	1	Vehicle		Schedu	ie –	Al	
												Vehicle	. <<
					Tick	et#			V	VO#	37403	331641	_
					Ticket Dr	ste							
	2002				1	N 1G1JC124	4X272	03594			not o	oded 🔻	a l
	Chevro	olet Caval	er										
	2 Door	Coupe			Licen	se ASAD789		State AZ		In	voice C	ode / History	¥
	Loc	okup Vehi	cle		Milea	ge 22380		Color Gr	een				
								Se	ve Und				
										_			
	Owner Inv		Ins	Fleet Inv									
	Glass	s ID				Description	1			Dime	nsion	Invoice	<<
DW0	1191		1	Windshield, encapsulated						36	x 57	No Invoice#	;
0	P	art Id			Descri	ption		Qty Unit	List	08A	Disc	Net	Tax
	DW01191		1	Windshield	G	BN,		1each	\$254.25	1	75%	\$63.56	s 🔽
-	LABOR		1	Windshield	L	abor		2.3hrs	\$85.00	1	flat	\$135.00	
34	HAH00044	8	,	Adhesive	2 Ur	.0 Fast-Cure ethane/Dam/Pri	imer	1each	\$48.00	<u>V</u>	flat	\$50.00	<u>م</u> (
	Ad	d Line	Ne	w Glass Part		Check Inventory	/Order			s	ub Total	\$248.56	\$
											Tax	\$1.70)
			L	Payment/	(Adjustme)	nt				Total (Charges	\$250.26	\$
Deduc	ctible Disc.	\$	50.00							De	ductible	\$0.00)
⊢ Ap	ply Cash Dis	scount	[Override O	A.80						Total	\$250.26	3
					Rebs	te: 2 Omaha St	eaks						
				Sub	bmit to MC	C Conv	ert Quo	te to WO					
									-				

Completed Vehicle Information Window

3.3.2.5.5.2 Ticket Number

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

0	wner	Bill	To	Agent		Loss Info	Ve	hicle	1	Schedu	ule:	AI	
												Vehicl	e <<
					Ticket#				V	VO#	37403	331641	_
				T	cket Date								
	2002				VIN	161/01248	27203	594				adad 1	-
	Chevro	olet Cava	lier									looed -	
	2 Door	Coupe			License	ASAD789	St	ste AZ		li	woice C	ode / Histor	y
	Loc	okup Vehi	icle		Mileage	22380	Co	lor Gr	een				
								S	we Und				
										~			
	Owner Inv		In	s/Fleet Inv									
	Glass	s ID			1	escription				Dime	nsion	Invoice	<
DW0	1191			Windshield, encapsulated						36	x 57	No Invoice	
0	P	art Id			Descript	ion	Q	y Unit	List	08A	Disc	Net	Tax
	DW01191			Windshield	GBN	ι,		1each	\$254.25	1	75%	\$63.5	6 🔽
-	LABOR			Windshield	Lab	or	2	3hrs	\$85.00	1	flat	\$135.0	0
34	HAH00044	8		Adhesive	2.0 I Ureth	Fast-Cure nane/Dam/Prime	er	1 each	\$48.00	$\overline{{\bf v}}$	flat	\$50.0	~ 이
	Ac	dd Line	N	lew Glass Part	Ch	eck Inventory/O	rder			s	ub Total	\$248.5	6
				December 10 d		_				_	Tax	\$1.7	0
				Payment/Ad	jusiment					Total	Charges	\$250.2	6
Deduc	ctible Disc.		\$0.00							De	ductible	\$0.0	0
□ Ap	ply Cash Di	scount		Override 0&4	Α						Total	\$250.2	6
					Rebate:	2 Omaha Steal	ks		_				
				Submi	t to MGC	Convert	Quote	to WO					
				~ /		/ · · · /	1 0		_				

Completed Vehicle Tab Screen

3.3.3 Applying Discounts

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

3.3.3.1 Applying O&A Rules to a Quote

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

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

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

								Vehicle	e <<
		Ticket#			W	0# 3	397253	3	
2000		VN	KMHWF25V7YA	227034			. not co	ded 🛛 💽	*
Hyundai Sonata 4 Door Sedan		License		Stat	e	Inv	oice Cod	le / Histor	У
Lookup Vehic	le	Mileage				Sa	ve Lin	do	
Glass ID		D	escription			Dime	nsion	Invoice	<
FW02114	Windshield	-				34.3	x 60.6		_
Part Id		Description	on	Qty Unit	List	0&A	Disc	Net	Tax
FW02114	Windshield	GBN		1each	\$702.95	2	40%	\$421.7	7 🔽
FW02114	Windshield	Labor		3.2hrs	\$35.00	✓		\$112.0	V 🔽
HAH000448	Adhesive	2.0 Fast-Cure Urethane/Dam/P	rimer	1each	\$48.00	$\overline{\mathbf{v}}$	flat	\$30.0	0 🔽
HML020896	Moulding	Reveal		1each	\$53.34			\$53.3	4 🔽
Convert PO to Invoice	New Glace Pa	-+				S	ub Total	\$617.1	1
Convex No to invoice	New Glass F.d	<u> 19</u>					Tax	\$23.8	5
Apply Cash Discount						Total (Charges	\$640.9	6
Deductible Disc. \$0.00						De	ductible	\$50.0	0
							Total	\$590.9	6

O&A Rules Applied in Quotes

3.3.3.2 Applying Deductible - Promotional Discount

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

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

OwnerInsura	ance	Agent Lo	oss Info	Ve	hicle	Sc	hedu	e	AI	
									Vehicle	. <<
		Ticket#				W	0# ;	3397252	24	
2003		VN	JTHEF300	313011	3965		í	not co	ded 🖂 😽	
Lexus ES 300		License			Stat	•		voice Cod	ie (History	
4 Door Sedan		Cloonad		_	0.00	·	1.00		22	
Lookup Vehi	cle	Mileage					2	eye, Uu	001	
Class ID		D	escription				Dim	ension	Invoice	1
FW02276	Windshi	eld. Solar Coated	eacription				37	4 x 59 7	Invoice	
Part Id		Descriptio	on	(Otv Unit	List	08A	Disc	Net	Tax
FW02276	Windshi	eld GBN			1each	\$817.40	V	-10%	\$899.14	V.
FW02276	Windshi	eld Labor			3.4hrs	\$45.00	☑	+base	\$253.00	V
HAH000448	Adhesiv	e 2.0 Fast-Cure Urethane/Dam/P	rimer		1each	\$48.00	$\overline{\mathbf{v}}$	flat	\$30.00	V.
HML026830	Moulding	1			1each	\$32.86			\$32.86	N.
Convert RO to Invoice	New Glass	Part:						Sub Total	\$1,215.00	
E Apply Cook Discourt							Tatal	Tax	\$45.82	
Apply cash Discount							Idtai	unarges	31,200.04	
Deductible Disc. \$0.00							D	eductible	\$250.00	
								Total	\$1,010.82	2

Vehicle Tab

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

Owner Insurance	Agent	Los	is info	V	ehicle	Sc	hedu	le .	AI	
									Vehicle	. <<
	1	Ticket#				W	0#	3397252	4	
2003		VN.	THBF30G	1301	13965		[not co	ded 🔗	1
Lexus ES 300		icense			Stat		1 10	volce Cod	ie / History	,
4 Door Sedan					0.00	°			7	' I
Lookup Vehicle	j n	/ileage		_			18	eve i l'un	GO)	
Class ID		De	entietien				Dies	ension	Involter	
Glass ID	We debied only 0.	Ue	scription				UIM	ension	invoice	<<
FW02276	Windshield, Solar Co	ated			-		37.	4 x 59.7		_
Part Id	Des	scription	n		Qty Unit	List	08A	Disc	Net	Tax
FW02276	Windshield GBN				1each	\$817.40		-10%	\$899.14	• 🔽
FW02276	Windshield Labor				3.4hrs	\$45.00		+base	\$253.00	
HAH000448	Adhesive 2.0 Fast- Urethane	-Cure /Dam/Pri	mer		1each	\$48.00	•	flat	\$30.00	V.
HML026830	Moulding				1each	\$32.86			\$32.86	V
Convert RO to Invoice	our Glace Pad							Sub Total	\$1,215.00	
Convert No to avoice	ow Glass Fall							Tax	\$45.82	2
Apply Cash Discount							Tota	I Charges	\$1,260.82	2
Deductible Disc. \$100.00							0	eductible	\$250.00)
								Total	\$1,010.82	2

Deductible - Promotion Discount Applied

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



3.3.4 **Printing a Quote**

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

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

) × 💩 ᡈ	ø	T= 100%	•		1	of 1	Þ.	$\left\ \cdot\right\ $	4	crystal 📀
Preview										
				Rep	oort Viewe	er Toolbar				

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

Select Printer	
2 2 2	k 🎽 🕯 🕯
Auto Acrobat Auto Canon Auto HP	Canon SS20 HP Laser Jet
	•
Statur: Ready	Print to file Preferences
Location	End Printer
Comment:	regrine
Page Range	
	Number of copies: 1
C Selection C Current Page	
C Pages: 1	E Colate
Enter either a single page number or a single page range. For example, 5-12	نقل الثقل

Print Dialogue Box

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

3.3.5 Deleting a Quote

To delete a Quote in eDirectGlass:

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

Microsoft Interne	t Explorer 🖪 🗙
2 Delete t	his Ounte?
	in dance:
ОК	Cancel

Delete Quote Dialogue Box

4. Click on the <u>OK</u> button and the Quote will be permanently deleted.

3.3.6 Converting a Quote to a Work Order

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

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

0	wner	Bill T	0	Agent	Los	is Info	Vehicle		Schedu	ie –	Al	
											Vehicle	• <<
					Ticket#			1	NO#	374033	331641	_
				Tick	et Date							
	2002				VIN 10	G1JC124X27	203594			not c	oded 🔻	-
	2 Door	Coupe	r	License ASAD789 State AZ				In	voice C	ode / History	5	
	Loc	okup Vehiol	e		Vileage 22	2380	Color Gr	een				
							Sa	we Und	lo			
	Owner Inv		Ins/Flee	s lov								
	Glass	s ID			Des	cription			Dime	nsion	Invoice	<<
DW01	1191		Wind	shield, encap	sulated				36	x 57	No Invoice#	ŧ
0	P	art Id		De	scription	l.	Qty Unit	List	08A	Disc	Net	Tax
	DW01191		Wind	shield	GBN,		1each	\$254.25	1	75%	\$63.56	5 🔽
-	LABOR		Wind	shield	Labor		2.3hrs	\$85.00	∇	flat	\$135.00	
34	HAH00044	8	Adhe	sive	2.0 Fas Urethan	t-Cure e/Dam/Primer	1each	\$48.00	$\overline{[v]}$	flat	\$50.00	ন (
	Ad	dd Line	New G	ass Part	Check	Inventory/Orde	Br .		S	ub Total Tax	\$248.56 \$1.70	5)
			F	ayment/Adjus	stment	J			Total (Charges	\$250.26	3
Deduc	tible Disc.	SC	0.00						De	ductible	\$0.00)
⊢ Ap	ply Cash Di	scount	C01	verride O&A						Total	\$250.26	3
				F	Rebate: 2 0	Omaha Steaks		_				
				Submit to	o MGC	Convert Qu	uote to WO					

Quote Vehicle Window - Convert Quote to Work Order

3.4 Work Orders

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

Find Work Ord	ier									
Date	Owner		Insurance							
Year	Phone		Claim No							
Make	ZIP		WO/Ticket Number							
Model	VIN		WO Codes							
Find Work Order Reset You may enter partial data in one or multiple fields Sort by WO Date Schedule Date										
Find Work Order Window										

3.4.1 Open Work Order

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

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

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

Date		Owner		Insu	rance		
Year		Phone		CI	aim No		
Make		ZIP		WO/Ticket N	umber		
Model		VIN					
mouor		· · · ·		WO	Codes		
Find We	ork Order	Reset You	may enter partial data i	n one or multiple t	fields Sort by	Schedule D	2
Date	Make	Model	Owner	City	Insurance	Total	
06/15/2013	Audi	A6	TED SMTH	SCOTTSDALE	STATEWIDE MUTUAL	\$10.00	
06/15/2013	Audi	A6	Gary Hart	SCOTTSDALE		\$0.00	
06/10/2013	Audi	A5	TODD FRAMER			\$0.00	
05/28/2013	Buick	Electra	TED SMITH	SCOTTSDALE	No Insurance	\$0.00	
05/28/2013	Acura	2.3CL	TED FOSTER	SCOTTSDALE		\$0.00	
05/17/2013	Toyota	Camry	HARLOD SMITH	SCOTTSDALE	STATEWIDE MUTUAL	\$895.79	I
05/17/2013	Audi	A6	TED REYNOLDS	SCOTTSDALE	STATEWIDE MUTUAL	\$10.00	
05/14/2013	Ford	Mustang	Bill Smith	SCOTTSDALE	STATE FARM	\$435.49	
04/30/2013	Honda	Civic	bobby brown		STATE FARM	\$730.00	1
04/19/2013	Toyota	Camry	Larry Bottoms	SCOTTSDALE	STATEWIDE MUTUAL	\$264.71	
04/16/2013	Honda	Civic	Maria Iorio	Scottsdale	STATE FARM - BILL DIRECT	\$1,077.50	1
04/15/2013	Toyota	Camry	Peko Teko	SCOTTSDALE	No insurance	\$0.00	
04/15/2013	Acura	2.2CL	test test	SCOTTSDALE	No insurance	\$0.00	
04/15/2013	Acura	2.2CL	test test	SCOTTSDALE	No insurance	\$0.00	I
04/15/2013	Toyota	Camry	Larry Barnes	SCOTTSDALE	STATEWIDE MUTUAL	\$255.68	l
04/15/2013	Toyota	Camry	Lonnie Meade	SCOTTSDALE	STATEWIDE MUTUAL	\$787.36	
04/11/2013	Ram	Pickup	Maria Elana Iorio	SCOTTSDALE	HARTFORD OMNI AUTO PLAN	\$351.00	
	Trank	E Carles	MARKA IODIO	CONTROL 1	OT LTT TABLE	R + R R R	

Work Orders List

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

3.4.1.1 Work Orders List Color Coding

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

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

Date		Owner		Insu	urance	
Year		Phone		CI	aim No	
Make		ZIP		WO/Ticket N	lumber	
Model		VIN		100	Carden -	
110001				wo	Codes	
Find W	ork Order	Reset You	may enter partial data ir	n one or multiple t	fields Sort by WO Date	Schedule D
Date	Make	Model	Owner	City	Insurance	Total
6/15/2013	Audi	A6	TED SMTH	SCOTTSDALE	STATEWIDE MUTUAL	\$10.00
6/15/2013	Audi	A6	Gary Hart	SCOTTSDALE		\$0.00
6/10/2013	Audi	A5	TODD FRAMER			\$0.00
05/28/2013	Buick	Electra	TED SMITH	SCOTTSDALE	No Insurance	\$0.00
05/28/2013	Acura	2.3CL	TED FOSTER	SCOTTSDALE		\$0.00
05/17/2013	Toyota	Camry	HARLOD SMITH	SCOTTSDALE	STATEWIDE MUTUAL	\$895.79
05/17/2013	Audi	A6	TED REYNOLDS	SCOTTSDALE	STATEWIDE MUTUAL	\$10.00
05/14/2013	Ford	Mustang	Bill Smith	SCOTTSDALE	STATE FARM	\$435.49
4/30/2013	Honda	Civic	bobby brown		STATE FARM	\$730.00
04/19/2013	Toyota	Camry	Larry Bottoms	SCOTTSDALE	STATEWIDE MUTUAL	\$264.71
04/16/2013	Honda	Civic	Maria Iorio	Scottsdale	STATE FARM - BILL DIRECT	\$1,077.50
04/15/2013	Toyota	Camry	Peko Teko	SCOTTSDALE	No Insurance	\$0.00
04/15/2013	Acura	2.2CL	test test	SCOTTSDALE	No Insurance	\$0.00
04/15/2013	Acura	2.2CL	test test	SCOTTSDALE	No Insurance	\$0.00
04/15/2013	Toyota	Carry	Larry Barnes	SCOTTSDALE	STATEWIDE MUTUAL	\$255.68
04/15/2013	Toyota	Camry	Lonnie Meade	SCOTTSDALE	STATEWIDE MUTUAL	\$787.36
04/11/2013	Ram	Pickup	Maria Elana Iorio	SCOTTSDALE	HARTFORD OMNIAUTO PLAN	\$351.00
04/04/2013	Ford	F Series	MARIA IORIO	SCOTTSDALE	STATE FARM	\$100.00

Work Orders List

3.4.2 Schedule Work Order

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

3.4.2.1 Hourly Job Schedule

Owner	Insurance	Agent	Loss Info	Vehicle	Schedule	All
						Schedule <<
Mobile	Technician	Maria Meadow	Complet	ed 📃 Notes		~
Date 03/29/200	5	Hank Richards	Service Addre	58		
Start		Albert Sands	RO Code / Histo	ry		~
End			OPEN	 Warranty 	Original Invo	lice
	2		modified		View Schedule	Save Undo

Hourly Schedule Window

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

	v	Vednesday, January 28, 2004		
Time	Hank Richards	Sunny Roberts	Albert Sands	
8:00 am				
8:15 am				
8:30 am				
8:45 am				
9:00 am				
9:15 am				
9:30 am				
9:45 am				
10:00 am				
10:15 am				
10:30 am				
10:45 am				
11:00 am				
11:15 am				
11:30 am				
11:45 am				
12:00 pm				
12:15 pm				
12:30 pm				
12:45 pm				
1:00 pm				
1:15 pm				
1:30 pm				
4.45				

Day Calendar View - Hourly

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

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

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



Appointment in the Day Calendar View - Hourly

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

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

3.4.2.2 AM/PM Schedule

Owner	insurance.	Agent	Loss Info	Vehicle	Schedule	All.
						Schedule <<
Mobile 🖌	Technician M	aria Meadow	Completed	Notes		1
Date 8/3/2004	H	ank Richards	Service Address			
AM 💿	Al	bert Sands	WO Code / Histo	ху		1
PM O			OPEN	Warranty	Original Invoid	e
				- ¹	New Schedule	Save Undo

AM/PM Schedule Window

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

Owner	r Insurance		Agent	Loss Info		Vehicle	Schedule	All
	•	1					•	Schedule <<
Mobile 🖌 Date 8/3 AM 💿	Technician /2004	Maria M Hank F Sunny I Albert S	Meadow Nichards Roberts Sands	Comp Service Add WO Code	leted 🔝 Iress 📃 / History	Notes		
PM 🔿				OPEN	2	Warranty	Original Invo New Schedule	Save Undo
		ĺ.	Thu	rsday, June	03, 2004	1		
Time	Maria Meadow	v	Hank Ri	chards	Sun	ny Roberts	Alber	t Sands
8 :00 AM	Frankle Vinton 11000 E Shea Rd Scottsdale,AZ 85259)			Tony Llam 8745 N Pir Scottsdak	na ma Rd e.AZ 85258		~
12:00 PM								
								Y

Day Calendar View - AM/PM

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

Owner	insurance	Agent	Loss Info		Vehicle	Schedule	All
							Schedule <<
Mobile 🖌	Technician	Maria Meadow	Comp	leted 📃	Notes		A
Date 8/3/	/2004	Sunny Roberts	Service Add	fress			
AM 💿		Albert Sands	WO Code	a / History			×
PM 🔘			OPEN	×	Warranty	Original Invoi	ce
					1	New Schedule	Save Undo
		The	ursday, June	03, 2004	1		
Time	Maria Meadov	w Hank R	ichards	Sun	ny Roberts	Albert	Sands
	Frankie Vinton	Howard Hugh	65	Tony Llam	18		~
8 :00 AM	Scottsdale,AZ 85259	Scottsdale,AZ	85251	Scottsdak	e,AZ 85258		
							E.
12:00 PM							
							×

Appointment in the Day Calendar View - AM/PM

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

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

3.4.3 Service Address

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

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

			Service Location Record
First Name	Middle		Primary Phone
Last Name	Prefix	Suffix	Secondary Phone
Address			Mobile Phone
Address2			Fax
City	State	Zip	Delete?
Email			Save Undo
Notes			2
			×.

Service Location Record Window

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

Owner	Insurance	Agent	Loss Info	Vehicle	Schedule	All
						Schedule <<
Mobile 🔽	Technician	Maria Meadow	Completed	Notes		~
Date 06/03/20	04	Hank Richards	Service Address	×		
AM 💿		Albert Sands	RO Code / Histo	ry		M
PM 🔘			OPEN	modified	View Schedule	Save Undo

Schedule Tab with Service Address

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

3.4.4 Using WO Codes

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

3.4.4.1 Applying WO Code

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



3.4.4.2 WO Code History View

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

Owner	Insurance	. Agent	Lossinfo	Vehicle	Schedule	. Al
						Schedule <<
Mobile 🔽 Date 03/03/200	Technician	Fierst Laborguy Hank Richards Sunny Roberts	Completed	Votes Notes	this oustomer wants to h tinting installed.	ave 📃
Start 10:45 AM		Albert Sands	WO Code / Hi	story		*
End 1:45 PM		ven retus	SO	AGH		Undo
				by David Malo	ne on 3/10/2004 11:46	AM
				HA by Gary Hart (on 3/12/2004 7:16 AM	
				AU by Sunny One	on 3/13/2004 1:32 PM	
				SO by David Malo	ne on 3/14/2004 4:40 P	M

WO Code History View

3.4.5 Attachments

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

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

3.4.5.1 Add Attachment

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



Image Attachment Window

3.4.5.1.1 Attach Saved Image

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

Open				• • ? 🛛
Look in:	edgmanimages	2	- + 🗈 💣 📰	•
My Recent Documents				^
Desktop	faq	handshake	login	
My Documents	eDirections		A BRITAN	
My Computer	logo	main screen new	streetscene	
				<u>~</u>
My Network	File name:		•	Open
ridoes	Files of type: All a	supported formats	×	Cancel

Image Find/Open Window

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

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



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

Completed Image Attachment Window.

3.4.5.1.2 Attach Image Directly from TWAIN Device

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

Acquire		×
Microtek ScanWizard 5	×	OK
Show UI	Acquire	Cancel

Acquire Dialogue Box

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

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3.4.5.2 View Attachments

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

Attachments for Invoice #2544								
View	Brochure	eDirectGlass Brochure						
View	Logo	eDirectGlass Logo						
	Attachments	Window						

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

3.4.6 Print Work Order

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

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



Report Viewer Toolbar

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

Print	D1×
General Options	
Select Printer	
	🎍 🎳 A
Auto Acrobat Auto Canon Auto HP Distiller on SS20 on LaserJet 41	Canon SS20 HP Laser3et on GREEN2 4100 PCL 6
Statur: Ready Location: Comment:	Print to file Preferences Find Printer
Page Range G Al	Number of copies: 1
C Selection C Current Page C Pages: 1	
Enter either a single page number or a single page range. For example, 5-12	
Pri	nt Cancel Apply

Print Dialogue Box

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

3.4.7 Delete Work Order

To delete a Work Order in eDirectGlass:

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



Delete Work Order Dialogue Box

4. Click on the <u>OK</u> button and the Work Order will be permanently deleted.

3.4.8 Converting Work Order to Invoice

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

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

Owne	er	Bill To	Agent	L	oss info		Vehicle	le Schedule /				
											Vehicle	• <<
	Ticket#							1	NO#	374033	331641	_
			Tick	et Date								
	2002			VIN	16110124	x272	03594				adad -	
	Chevrole	et Cavalier			alid VIN		00004			NOE C	ocec •	
	2 Door 0	oupe		License	ASAD789		State AZ		k	voice C	ode / Histor	
	Look	up Vehicle		Mileage	22380		Color Gr	en				·
				inite age	22000	_	Contra Contra	ve Und				
							- 50	velune	10			
0.	roer lov		s/Fleet Inv									
	Glass			De	scription				Dime	nsion	Invoice	<<
DW01191	01000		Windshield encansulated					36	x 57	No Invoiced		
0	Pa	rt Id	De	scriptio	n		Qty Unit	List	08A	Disc	Net	Tax
DW	01191		Windshield	GBN,			1each	\$254.25	1	75%	\$63.56	5 🔽
- LA8	BOR		Windshield	Labo	r		2.3hrs	\$85.00	1	flat	\$135.00	
34 HAI	H000448		Adhesive	2.0 F	ast-Cure ane/Dam/Pri	mer	1 each	\$48.00	1	flat	\$50.00	
Add Lin	e	New Glass Pa	rt Check Ir	wentory/	Order	Co	py Work Or	der	S	ub Total	\$248.56	3
			Paument/Adiu	stment					-	Tax	\$1.70	2
		50.00	r aymaner aya	annens					Total	charges	\$250.20	5
Deductible	DISC.	50.00							De	ductible	\$0.00	,
Apply	cash Disc	pount	Uvernde U&A	Debate: 1	Caraba Sta	aba				Total	\$250.20	5
			Cabacity	Medale. 2	Comana Ste	- 140	to beveloe	1				
			Submit	io mac	Conve	n wo	to invoice	1				
												*
												Ŧ
			Invo	ice Ve	ehicle V	Vinc	low					

3.4.9 Apply A Payment or Make an Adjustment

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

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

Owner	Insurance	Agent	Loss Info	Vehic	e	Sched	ule	All
	· · ·							Vehicle -
		Ticket	8			R0#	101316	57809
1969		VI	N				not c	oded 💌
Ford Fairla	ine							
2 Door Co	nvertible	Licensi	e	State			invoice Ci	ode / History
Looku;	o Vehicle	Mileage	e	Color				
					Save Und	0		
								_
Gluss ID			Description	_		Dim	ension	Invoice
DW00700	Wind	15			1.1-4	2	5 X 62	No invoice#
DW00700	4 Wind	Please C	hoose	1 630	h \$225.10	1000	90%	S22.51
- LABOR	Wind	O Apply	a Payment	5hrs	\$30.00	V	+base	\$255.00
HAN000449	Adb	Make	an Adjustmer	rt	5 C 40 00	E	flat	5100 00 E
HA1000440	Addin	Nex	t Close	1 Bac	11 340.00	IM	Tid.	\$100.00 p
Convert RO to Invoid	New Gl	83					Sub Total	\$457.51
Payment/Adjustm	ient.	-					Tax	\$378.76
Apply Cash Disco	unt 🔽 O	verride O&A				Total	Charges	\$836.27
Deductible Disc.	\$0.00					Ð	eductible	\$0.00
							Total	\$836.27

Payment/Adjustment Selection

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

Owner	Insurance	Agent	Loss Info	Vehicle	Schedule	AI		
	Post Payment							
Date 09/06/200	Date 09/06/2007 Amount 50.00 VISA 💌 856565 Paid By C Insurance € Owner							
	Owner				Balance	Post Payment		
Dick Bacelar			16780	9 \$836.27	\$836.27	50.00		

Apply a Payment from Work Order

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

Remittance							
Date Paid Type Check No Paid By Description		Amount					
9/6/2007	VISA	858585	Owner	Payment	(\$50.00)		
Balance Due							

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

Owner	Insurance	Agent	Loss Info	Vehicle	Schedule	Al
Owner Insurance		Invoice	Amount	Balance		
Dick Bacelar	STATEW	IDE MUTUAL		167809	\$836.27	\$786.27
Date 09/06/20 Set invoice status	to SUBMITTED	t Adjusted 10.00				
Reason Scratched	oecau				~ >	
Adjus	st Invoice	Cancel				

Make an Adjustment from Work Order

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

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

Remittance Box

3.4.10 eMinder

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

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

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

eMinder Settings		
Enable Reminder? yes 🐵 no 🔿	Reminder N	otice 0 days prior to schedule date.
From Address		
		*
L		*
	Save Quit Without Saving	
Record Tags		
<fullname> - Customer Full Name</fullname>		
<schdate> - Schedule Date/Time</schdate>		
<veh> - Year, Make, Model</veh>		
<svcaddy> - Service Address</svcaddy>		
<techname> - Technician Name</techname>		
stearninger - reannaar slidge	eMinder Settings Panel	

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



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

eMinder Settings	
Enable Reminder? yes @ no 💿	Reminder Notice 0 days prior to schedule date.
From Address maria.iorio@edirectglass.com	
Dear <fullname>,</fullname>	*
Thank you for trusting us with your automotive glass needs. T scheduled for <schdate> to repair or replace glass on your < Please be advised that our technician, <techname>, will be a</techname></schdate>	his is a reminder that you have a service appointment VEH>.
<svcaddy>. A typical installation takes up to one hour. Pleas <amt2col> at the conclusion of the job.</amt2col></svcaddy>	se be advised that our technician will need to collect
<techimage> <techname></techname></techimage>	
Save	Quit Without Saving

eMinder Settings Panel - Completed

eMinder Notes

When an eMinder is sent for a work order in the system, you will see an indication on the

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

Quotes & Invoicing	Message Center 🗸 C&V R	elationship Mgmt 👔	Marketing Accourt	nting Administra	ation Marketplace
Quotes & Invoicing	Owner Bill To	Agent	Loss Info	Vehicle Sch	edule All
New Assignments					Schedule <<
Quick Quote	Mobile Technician	Laura Coleman	Completed [Notes	*
Quotes	Date 11/09/2010	Gary Hart	Service Address		
Work Orders	1103/2010	Mana Iono =			
Scheduling	AM ()	Nick Rhodes	WO Code / History		×
Invoicing	PM 🔘	Marty Yalmo	CL -	Warranty 📃 O	riginal Invoice
Work Order	eMinder Sent: 11/9/2010 4:37:	00 PM		View Sc	shedule Save Undo

Schedule Tab with eMinder Date & Time Stamp

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

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

Reminder of Glass Service From Shades Auto Glass Inbox X

会	gary@edirectglass.com to me	show details Nov 9 (5 days ago)	to Reply 🔹
D	ear Tim Smithers,		
T a	hank you for trusting us with your automotive glass needs ppointment scheduled for 11/09/2010 to repair or replace	 This is a reminder that you have glass on your 2008 Toyota Camry 	a service
P 1	lease be advised that our technician will be arriving at the 234 E Anywhere St, HIGLEY, AZ, 85236	following location to perform the v	vork:
A	typical installation takes up to one hour and you do not dvised that our technician will need to collect \$628.61 at t	need to be present during this time the conclusion of the job.	e. Please be
•	Reply Forward		

3.5 Scheduling

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

3.5.1 Create Schedule

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

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

	Date 07/05/2013	Shop		Mobile	Load Schedule
--	-----------------	------	--	--------	---------------

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

	Date 07/05/20)13	Shop	Mob	ile		Load Schedule
WO#	Last Name	Technicia	n	Part #	ZIP	ETA	Appointment Cross Streets
3171925	Hhgg	Job Bucket	•		85258	PM	Store # 1234
3224191	lorio	Job Bucket	•	DW01993	85308	AM	Store # 1234 67th & BH
3270760	SMITH	Job Bucket	•	FW02627	85258	AM	Store # 1234
3332161	Crawford	Job Bucket	•		21206	PM	Store # 1234

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

3.5.2 Viewing Schedule

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

				les les		
		Monda	y, December 29, 3	2003		
Time	Not Assigned	Fierst Laborguy	Glen LeftButton	Sunny One	Testing Procedures	Albert Technician
3:00 AM					Paul Guess	
8:15 AM					5487 E Coronado	
8:30 AM					Scottsdale AZ 85251	
8:45 AM					please call customer before arrival	
9:00 AM		Tyson Ray				
9:15 AM		5643 N 68th St				
9:30 AM		Phoenix AZ 85006				
9:45 AM						
MA 00:01				Richard Iorio		
10:15 AM				15 115 N 99th St		
10:30 AM				Scottsdale AZ 85260		
10:45 AM						
11:00 AM						
11:15 AM						
11:30 AM						
11:45 AM						
2:00 PM						
1215 PM						
2:30 PM						
2:45 PM						

3.6 Invoicing

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

Find Invoice		
Date	Owner	Master Invoice Number
Insurance	Claim No	Custom Invoice Number
Year	Phone	Ticket Number
Make	ZIP	Invoice Codes 👻
Model	VIN	
Glass Id	Plate	Invoice Status: 🖾 📕 🖾 📕
Find Invoice	Note: You may enter p	artial data in one or multiple fields
Create New Invoice	Find Closed/Histo	ric Invoice Reset
	Find Invoic	e Window

3.6.1 Open an Invoice

To open and work with an Invoice:

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

Find Invoice		
Date	Owner	Master Invoice Number
Insurance	Claim No	Custom Invoice Number
Year	Phone	Ticket Number
Make	ZIP	Invoice Codes -
Model	VIN	
Glass Id	Plate	Invoice Status: 🖾 📕 🗖 📕
Find Invoice	Note: You may enter	partial data in one or multiple fields
Create New Invoice	Find Closed/Hist	oric Invoice Reset
	Find Invoi	ce Window

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

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

Invoice List

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

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

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

3.6.1.1 Invoice List Color Coding

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

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

BC 03/03/2004 1998 Mercedes Benz C280 T.S. Blot No Insurance BP 03/03/2004 1999 Mercedes Benz C230 C.S. Lewis STATEWDE MUT 03/02/2004 1999 Hyundai Accent Aqua Keeler * No Insurance CB 02/23/2004 1999 Hyundai Accent Aqua Keeler * No Insurance CB 02/20/2004 1992 Toyota Corola Bob Thomas * STATEWDE MUT BC 02/20/2004 2003 Infiniti FX35 Charton Heston STATEWDE MUT V 02/18/2004 1999 Toyota Cariny Cori Rooney STATEWDE MUT 02/11/2004 2001 Lincoln Continental Carlos Santana No Insurance 02/11/2004 2003 Lexus SC 430 Norm Hughes STATEWDE MUT 02/11/2004 2000 Toyota Avaion Peter Tudor No Insurance 02/11/2004 2000 Toyota	BC 03/03/2004 1998 Mercedes Benz C280 BP 03/03/2004 1999 Mercedes Benz C230 D3/02/2004 1999 Mercedes Benz C230	T.S. Ellot C.S. Lewis		No Insurance STATEMDE MUTUAL
BP 03/03/2004 1999 Mercedes Benz C230 C.S. Lewis STATEWDE MUT 03/02/2004 1999 Hyundai Accent Aqua Keeler * No Insurance C8 02/20/2004 1992 Toyota Corolla Bob Thomas * STATEWDE MUT BC 02/20/2004 1992 Toyota Corolla Bob Thomas * STATEWDE MUT BC 02/20/2004 2003 Infiniti FX35 Charton Heston STATEWDE MUT W 02/18/2004 1999 Toyota Continental Carlos Santana No Insurance 02/11/2004 2001 Lincoln Continental Carlos Santana No Insurance 02/11/2004 2003 Lexus SC 430 Norm Hughes STATEWDE MUT 02/11/2004 2003 Lexus SC 430 Norm Hughes STATEWDE MUT 02/11/2004 2000 Toyota Avaion Peter Tudor No Insurance 02/11/2004 2003 Jaguar S-Type <td>BP 03/03/2004 1999 Mercedes Benz C230 03/02/2004 1999 Hamdel Acce</td> <td>C.S. Lewis</td> <td></td> <td>STATEMDE MUTUAL</td>	BP 03/03/2004 1999 Mercedes Benz C230 03/02/2004 1999 Hamdel Acce	C.S. Lewis		STATEMDE MUTUAL
03/02/2004 1999 Hyundai Accent Aqua Keeler ^ No Insurance CB 02/23/2004 1992 Toyota Corolia Bob Thomas ^ STATEMPLE MI BC 02/20/2004 2003 Honda Civic Alan Man Agency: Big Clair 02/20/2004 2003 Infiniti FX35 Charton Heston STATEWDE MUT W 02/18/2004 1993 Toyota Carry Cori Rooney STATEWDE MUT 02/11/2004 2001 Lincoln Continental Carlos Santana No Insurance 02/11/2004 2003 Lexus SC 430 Norm Hughes STATEWDE MUT 02/11/2004 2000 Toyota Avaion Peter Tudor No Insurance 02/11/2004 2003 Jaguar S-Type NO Insurance Pro STATEWDE MUT	0302/2004 1999 Hamdai Acce			of the time time to the
CB 02/23/2004 1992 Toyota Corolla Bob Thomas A STATEMANE MIT BC 02/20/2004 2003 Honda Civic Alen Man Ágency: Big Clair 02/20/2004 2003 Infiniti FX35 Charton Heston STATEMADE MIT W 02/8/2004 1999 Toyota Carrry Cori Rooney STATEMADE MUT 02/11/2004 2001 Lincoln Continental Carlos Santana No Insurance 02/11/2004 2003 Lecus SC 430 Norm Hughes STATEMDE MUT 02/11/2004 2000 Toyota Avaion Peter Tudor No Insurance 02/11/2004 2003 Jaguar S-Type No Insurance Pro STATEWDE MUT	0000212004 1000 Hydriddi McCc	nt Aqua Keeler		No Insurance
BC 02/20/2004 2003 Honda Civic Alan Man Agency: Big Clair 02/20/2004 2003 Infiniti FX35 Charton Heston STATEWIDE MUT VV 02/13/2004 1999 Toyota Carriny Cori Rooney STATEWIDE MUT 02/11/2004 2001 Lincoln Continental Carlos Santana No Insurance 02/11/2004 2003 Lexus SC 430 Norm Hughes STATEWIDE MUT 02/11/2004 2000 Toyota Avaion Peter Tudor No Insurance 02/11/2004 2003 Jaguar S-Type No Insurance Pro STATEWIDE MUT	CB 02/23/2004 1992 Toyota Corol	a Bob Thomas		STATEMOE MUTUAL
02/20/2004 2003 Infiniti FX35 Charton Heston STATEWDE MUT W 02/18/2004 1999 Toyota Carliny Cori Rooney STATEWDE MUT 02/11/2004 2001 Lincoln Continental Carlos Santana No Insurance 02/11/2004 2003 Lexus SC 430 Norm Hughes STATEWDE MUT 02/11/2004 2000 Toyota Avaion Peter Tudor No Insurance 02/11/2004 2003 Jaguar S-Type No Insurance Pro STATEWDE MUT	BC 02/20/2004 2003 Honda Civic	Alan Man		Agency: Big Claims
W 02/18/2004 1999 Toyota Camry Cori Rooney STATEWDE MUT 02/11/2004 2001 Lincoln Continental Carlos Santana No Insurance 02/11/2004 2003 Lexus SC 430 Norm Hughes STATEWDE MUT 02/11/2004 2000 Toyota Avaion Peter Tudor No Insurance 02/11/2004 2003 Jaguar S-Type No Insurance Pro STATEWDE MUT	02/20/2004 2003 Infiniti FX35	Chariton Heston		STATEWIDE MUTUAL
02/11/2004 2001 Lincoln Continental Carlos Santana No Insurance 02/11/2004 2003 Lexus SC 430 Norm Hughes STATEWDE MUT 02/11/2004 2000 Toyota Avaion Peter Tudor No Insurance 02/11/2004 2003 Jaguar S-Type No Insurance Pro STATEWDE MUT	W 02/18/2004 1999 Toyota Camir	y Cori Rooney		STATE/VIDE MUTUAL
02/11/2004 2003 Lexus SC 430 Norm Hughes STATEMDE MUT 02/11/2004 2000 Toyota Avaion Peter Tudor No Insurance 02/11/2004 2003 Jaguar S-Type NO Insurance Pro STATEMDE MUT	02/11/2004 2001 Lincoln Contin	vental Carlos Santana		No Insurance
02/11/2004 2000 Toyota Avaion Peter Tudor No Insurance 02/11/2004 2003 Jaguar S-Type NO Insurance Pro STATE/MDE MUT	02/11/2004 2003 Lexus SC 43	0 Norm Hughes		STATEMIDE MUTUAL
02/11/2004 2003 Jaguar S-Type NO Insurance Pro STATE/MDE MUT	02/11/2004 2000 Toyota Avaid	n Peter Tudor		No Insurance
	02/11/2004 2003 Jaguar S-Typ	e NO Insurance Pro	1	STATEWIDE MUTUAL
U2/11/2004 2003 Jaguar S-Type Henry Tudor * No Insurance	02/11/2004 2003 Jaguar S-Typ	e Henry Tudor		No Insurance
BC 02/05/2004 2002 Ford Escape Tax Testing	BC 02/05/2004 2002 Ford Esca	e Tax Testing		

Invoice List

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

Find Invoice	e						
Date		Ow	ner		Mas	ter Invoice Number	
beurance		Claim	No		Cust	om Invoice Number	
lisulance		C.C.			0.000	Tabat Number	
Year		PD	one			licket Number	
Make			ZIP			Invoice Codes	
Model			VIN				
Glass Id		P	late		Invoice	e Status: 🗹 📕 🕅	
Find In	voice	Note	You m	ay enter partial da	ata in one or mu	utiple fields	ter
Create river	w Invoice						and a
Invoice	Sales	Date	Year	Make	Model	Owner	Total
Invoice 3321952	Sales	Date 06/26/2013	Year 2009	Make	Model	Owner Toni Braxton	Total \$630.64
Invoice 3321952 3292266	Sales	Date 06/26/2013 06/04/2013	Year 2009 2012	Make Toyota Honda	Model Camry Civic	Owner Toni Braxton hal hendricks	Total \$630.64 \$794.29
Invoice 3321952 3292266 3291934	Sales	Date 06/26/2013 06/04/2013 06/04/2013	Year 2009 2012 2012	Make Toyota Honda Nissan	Model Camry Civic Altima	Owner Toni Braxton hal hendricks Frank Mear	Total \$630.64 \$794.29 \$475.50
Invoice 3321952 3292266 3291934 3287727	Sales	Date 06/26/2013 06/04/2013 06/04/2013 05/31/2013	Year 2009 2012 2012 2012	Make Toyota Honda Nissan Lexus	Model Camry Civic Altima GS 350	Owner Toni Braxton hal hendricks Frank Mear Christine Lane	Total \$630.64 \$794.29 \$475.50 \$0.00
Invoice 3321952 3292266 3291934 3267727 3282353	Sales	Date 06/26/2013 06/04/2013 06/04/2013 05/31/2013 06/10/2013	Year 2009 2012 2012 2013 2013	Make Toyota Honda Nissan Lexus Ford	Model Camry Civic Altima GS 350 Mustang	Owner Toni Braxton hal hendricks Frank Mear Christine Lane Henry Ford	Total \$630.64 \$794.29 \$475.50 \$0.00 \$519.44
Invoice 3321952 3292266 3291934 3287727 3282353 3270799	Sales	Date 06/26/2013 06/04/2013 06/04/2013 06/04/2013 06/10/2013 06/10/2013	Year 2009 2012 2012 2013 2013 2013	Make Toyota Honda Nissan Lexus Ford Nissan	Model Camry Civic Altima GS 350 Mustang Titan	Owner Toni Braxton hal hendricks Frank Mear Christine Lane Henry Ford Tim Stevens	Total \$630.64 \$794.29 \$475.50 \$0.00 \$519.44 \$323.92
Invoice 3321952 3292266 3291934 3287727 3282353 3270799 3244266	Sales	Date 06/26/2013 06/04/2013 06/04/2013 05/31/2013 05/17/2013 05/17/2013 04/26/2013	Year 2009 2012 2012 2013 2013 2008 2013	Make Toyota Honda Nissan Lexus Ford Nissan Volkswagen	Model Camry Civic Altima GS 350 Mustang Titan Tiguan	Owner Toni Braxton hal hendricks Frank Mear Christine Lane Henry Ford Tim Stevens Bob Costas	Total \$630.64 \$794.29 \$475.50 \$50.00 \$519.44 \$323.92 \$50.00
Invoice 3321952 3292266 3291934 3287727 3282553 3270799 3244266 3228742	Sales Sales Charlie Murp	Date 06/26/2013 06/04/2013 06/04/2013 05/10/2013 05/10/2013 05/17/2013 04/26/2013 04/26/2013	Year 2009 2012 2012 2013 2013 2013 2008 2013 2009	Make Toyota Honda Nissan Lexus Ford Nissan Volkswagen Chevrolet	Model Camry Civic Altima GS 350 Mustang Titan Tiguan Aveo	Owner Toni Braxton hal hendricks Frank Mear Christine Lane Hency Ford Tim Stevens Bob Costas Larking Femballs	Total \$830.64 \$794.29 \$475.50 \$0.00 \$519.44 \$323.92 \$50.00 \$608.95
Invoice 3321952 3292266 3291934 3287727 3282353 3270799 3244266 3228742 3228310	Sales Sales Charle Murp Gary Hart	Date 06/26/2013 06/04/2013 06/04/2013 06/04/2013 06/10/2013 06/10/2013 04/15/2013 04/15/2013 04/15/2013	Year 2009 2012 2012 2013 2013 2008 2013 2008 2013 2009 2010	Make Toyota Honda Nissan Lexus Ford Nissan Volkswagen Chevrolet Toyota	Mode1 Carry Civic Altima GS 350 Mustang Titan Tiguan Aveo Carry	Owner Toni Braxton hal hendricks Frank Mear Christine Lane Henry Ford Tim Stevens Bob Costas Larking Fembalis Lonnie Meade	Total \$830.64 \$794.29 \$475.50 \$50.00 \$519.44 \$323.92 \$50.00 \$608.95 \$787.36
Invoice 3321952 3292286 3291934 3287727 3282353 3270799 3244286 3228742 32284742 3228310 32284149	Sales Sales Charlie Murp Gary Hart	Date 06/26/2013 06/04/2013 06/04/2013 06/10/2013 06/10/2013 06/17/2013 04/126/2013 04/12/2013 04/12/2013 04/12/2013	Year 2009 2012 2012 2013 2013 2008 2013 2009 2010 1997	Make Toyota Honda Nissan Lexus Ford Nissan Volkswagen Chevrolet Toyota Acura	Model Camry Chic Atima GS 350 Mustang Titan Tiguan Aveo Camry 2.2CL	Owner Toni Braxton hal hendricks Frank Mear Christine Lane Henry Ford Tim Stevens Bob Costas Larking Fembals Lonnie Meade test test	Total \$830.64 \$794.29 \$475.50 \$50.00 \$519.44 \$323.92 \$50.00 \$608.95 \$767.36 \$0.00
Invoice 3321952 3292266 3291934 3287727 3282353 3270799 3244266 3228742 3228310 3224149 3193740	Sales Sales Charle Murp Gary Hart	Date 06/26/2013 06/04/2013 05/04/2013 05/31/2013 06/10/2013 05/17/2013 04/15/2013 04/15/2013 04/12/2013 04/11/2013 04/11/2013	Year 2009 2012 2012 2013 2013 2013 2008 2013 2009 2010 1997 2010	Make Toyota Honda Nissan Lexus Ford Nissan Volkswagen Chevrolet Toyota Acura Toyota	Model Camry Civic Attma GS 350 Mustang Titan Tiguan Aveo Camry 2 2CL Camry	Owner Toni Braxton hal hendricks Frank Mear Christine Lane Henry Ford Tim Stevens Bob Costas Larking Fembalis Lonnie Meade test test Ted Barker	Total \$630.64 \$794.29 \$475.50 \$50.00 \$519.44 \$323.92 \$50.00 \$608.95 \$767.36 \$50.00 \$268.471
Invoice 3321952 3292266 3291934 328727 3282353 3270799 3244266 3228742 3228310 3224149 3193740 3193413	Sales Sales Charlie Murp Gary Hart Gary Hart	Date 06/26/2013 06/04/2013 06/04/2013 06/10/2013 06/10/2013 06/10/2013 06/10/2013 04/15/2013 04/15/2013 04/11/2013 04/11/2013 03/19/2013	Year 2009 2012 2012 2013 2013 2013 2018 2013 2008 2013 2009 2010 1997 2010 2010	Make Toyota Honda Nissan Lexus Ford Nissan Volkswagen Chevrolet Toyota Acura Toyota Toyota	Model Camry Chric Altima GS 350 Mustang Titan Tiguan Aveo Camry 2.2CL Camry Camry Camry	Owner Toni Braxton hal hendricks Frank Mear Christine Lane Henry Ford Tim Stevens Bob Costas Larking Fembalis Lonnie Meade test test Ted Barker Larry Barnes	Total \$630.64 \$794.29 \$475.50 \$519.44 \$323.92 \$50.00 \$608.95 \$787.36 \$0.00 \$364.71 \$364.71

Displaying Red Color Coded Invoices Only

3.6.2 Using Invoice Codes

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

3.6.2.1 Applying Invoice Codes

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

VIN BC Image: Constraint of the second	Owner	Insurar	nce	Agent	Loss Info	Vehi	cle	Sched	lule	AI
2003 VIN IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII										Vehicle <<
Honda Chic 4 Door Sedan License State I BC Glass ID Description Dimension NSF FV02183 Windshield 08×57.4 PP Part Id Description 0ty Unit List 08A Dis RPI FV02183 Windshield Lator 02.3 hrs 33 × 57.4 PP FV02183 Windshield Lator 2.3 hrs 35.500 SC SC FV02183 Windshield Lator 2.3 hrs 35.500 SC SC SC HAH000448 Adhesive 2.0 Fast-Cure Urethane/Dam/Primer 1 each \$48.00 V SC SC SC HCL022415 Clip(S) (set of 2) 1 each \$40.12 \$40.12 \$40.12 \$40.12 \$40.12 \$40.12 \$40.02 Total \$629.53 Add Line Add NAGS Item Sub Total \$629.55 Deductible \$0.00 Total \$680.55 Deductible \$0.00 Total \$680.55 Deductible \$0.00 Total \$680.55	200	3			VIN				BC	-
4 Door Sedan Mileage CB Glass ID Description Dimension NSF FW02183 Windshield 08 × 57.4 PP Part Id Description 0ty Unit List 08A Dis FW02183 Windshield Lator 02.3 hrs \$35.00 F SC FW02183 Windshield Lator 2.3 hrs \$35.00 F SC SC <td>Hon</td> <td>da Civic</td> <td></td> <td>U</td> <td>cense</td> <td></td> <td>State</td> <td></td> <td>BC</td> <td>A</td>	Hon	da Civic		U	cense		State		BC	A
Glass ID Description Dimension NSF Pw02183 Windshield 060 38 × 57.4 RJI Pw02183 Windshield GGN 1each \$797.65 ✓ RS PW02183 Windshield GGN 2.3hrs \$35.00 ✓ SC PW02183 Windshield Labor 2.3hrs \$35.00 ✓ SC HAH000448 Adhesive 2.0 Fast-Cure Urethane/DanuPrimer 1each \$48.00 ✓ \$0.32 ✓ HCL022415 Clip(S) (set of 2) 1each \$40.12 \$40.12 \$40.12 \$40.12 ¥40.12 ¥40.12 ¥40.12 ✓ Add Line Add NAGS Item Sub Total \$529.53 Total \$629.53 Total \$680.55 Deductible \$0.00 Total \$680.55 Deductible \$0.00 Total \$680.55	4 D	oor Sedan		M	leace				ELCB.	
Glass ID Description Dimension NSF Pw02183 Windshield 38 × 57.4 PP Part Id Description Oty Unit List 08A Dis PW02183 Windshield GGN 1each \$797.65 ✓ 4 PW02183 Windshield Labor 2.3hrs \$35.00 ✓ RS PW02183 Windshield Labor 2.3hrs \$35.00 ✓ SC HAH000448 Adhesive 2.0 Fast-Cure Urethane.DaruPrimer 1each \$48.00 ✓ \$0.32 ✓ HCL022415 Clip(S) (set of 2) 1each \$40.12 \$40.12 ✓ Add Line Add NAGS Item Sub Total \$629.53 Tax \$51.02 Total \$680.55									- 100	
FW02183 Windshield Description Oty Unit List 08A Dis RJI FW02183 Windshield GGN 1 each \$797.65 V 4 RP FW02183 Windshield Labor 1 each \$797.65 V 4 RS FW02183 Windshield Labor 2.3hrs \$35.00 V SC SC HAH000448 Adhesive 2.0 Fast-Cure Urethane/Dam/Primer 1 each \$0.32 SC \$0.32 V \$0.32 V \$0.32 V \$40.12 \$40.12 \$40.12 \$40.12 \$40.12 \$40.12 \$40.12 \$40.12 \$529.53 Tax \$51.02 \$529.53 \$50.05 \$680.55	Glass ID			Descri	iption			Dime	nsion NSE	-
Part Id Description Oty Unit List O&A Dis PJI RPI FV002183 Windshield GGN 1 each \$797.65 ✓ 4 RS FV002183 Windshield Labor 2.3hrs \$335.00 ✓ RS SC FV002183 Windshield Labor 2.3hrs \$335.00 ✓ RS SC HAH000448 Adhesive 2.0 Fast-Cure Urethane/Dam/Primer 1 each \$0.32 ✓ \$0.32 ✓ HCL022415 Clip(S) (set of 2) 1 each \$40.12 ✓ \$40.12 ✓ Add Line Add NAGS Item Sub Total \$629.53 Tax \$51.02 Total Charges \$680.55 Deductible \$0.00 Total \$680.55 SC Schuberts \$0.00	FV/02183	Windshield						38 x	57.4 PP	_
FW02183 Windshield GGN 1 each \$797.65 V 4 RS SC FW02183 Windshield Løbor 2.3 hrs \$35.00 V RS SC SC HAH000448 Adhesive 2.0 Fast-Cure Urethane/Dam/Primer 1 each \$48.00 V SC SP V HCL022415 Clip(S) (set of 2) 1 each \$0.32 \$40.12 \$40.12 \$40.12 \$40.12 \$40.12 \$40.12 \$40.12 \$40.012 \$629.53 Tax \$51.02 Total \$680.55 Deductible \$0.00 Total \$680.55 Deductible \$0.00 Total \$680.55 \$680	Part Id			Description		Qty Unit	List	08A	Dis	
FV002183 Windshield Labor 2.3hrs \$35.00 V SC HAH000448 Adhesive 2.0 Fast-Cure Urethane/Dam/Primer 1 each \$48.00 V SP V HCL022415 Clip(S) (set of 2) 1 each \$0.32 \$0.32 \$0.32 V HML022413 Moulding 1 each \$40.12 \$40.12 \$40.12 \$40.12 \$629.53 Add Line Add NAGS Item Sub Total \$629.53 Tax \$51.02 Total Charges \$680.55 Deductible \$0.00 Total \$680.55	FW02183	Windshield	GGN			1each	\$797.65		4RS	_
HAHUUU448 Addresive 2.0 Fast-Cure Oretnane/Damenimer 1 each \$48.00 ✓ SP ✓ HCL022415 Clip(S) (set of 2) 1 each \$0.32 \$0.32 ¥0.12 \$40.012 \$40.012 \$40.012 \$40.012 \$40.012 \$40.012 \$40.012 \$40.012 \$40.012 \$40.012 \$40.012 \$50.00 Total \$629.53 Tax \$\$51.02 \$50.00 Total \$680.55 Deductible \$0.00 Total \$680.55 \$680.5	FV/02183	Windshield	Labor			2.3hrs	\$35.00		SC	_
HCL022415 Clip(s) (set of 2) Teach \$0.32 \$0.35 \$0.32	HAHUUU448	Adhesive	2.0 Fast	t-Cure Urethane/L	amvenmer	1 each	\$48.00	M	SP	#0.00 Fr
Add Line Add NAGS Item Sub Total \$629.53 Tax \$51.02 Total Charges \$680.55 Deductible \$0.00 Total \$680.55	HCL022415	Clip(S) Moulding	(set or .	2)		1 each	\$0.32			\$40.32
Add Line Add NAGS Item Tax \$51.02 Total Charges \$680.55 Deductible \$0.00 Total \$680.55	FIME022413	mourumy				reach	\$40.12		Sub Total	\$629.53
Total Charges \$680.55 Deductible \$0.00 Total \$680.55	Add Line	Add NAGS	5 Item						Tax	\$51.02
Deductible \$0.00 Total \$680.55								Total	Charges	\$680.55
Total \$680.55								D	eductible	\$0.00
									Total	\$680.55
<u> </u>										
<u>×</u>										
										-
Save Invoice Notes Submit Invoice	Save Invoi	ce Notes							Subm	it Invoice

Invoice Codes Drop Down List

3.6.2.2 Invoice Code History View

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

Owner	Insurar	nce	Agent	Loss Info	Vehi	cle	Sched	dule	Al	
									Vehicle	<<
199	6			VIN				PP		-
Che	vrolet Beretta	Z26	L	icense		State		Invoic	e Code / Histo	ary
2 Do	oor Coupe		,	dieana				Save	Undo	
				meage						BP
Glass ID			Desci	iption			Dime	nsion	Invoice	by David Malone on 3/10/2004 11:31 AM
DV/01185	Windshield, B	Black Ba	ind				33.4	x 60.8		BC
Part Id			Description		Qty Unit	List	08A	Disc	Het T	by Gary Hart on 3/12/2004 7:16 AM
DW01185	Windshield	GBN			1 each	\$584.85			\$584.85	
DW01185	Windshield	Labor			2.3hrs	\$35.00			\$80.50	WC
HAH000448	Adhesive	2.0 Fa:	st-Cure Urethane/	Dam/Primer	1 each	\$48.00			\$48.00	by Sunny One on 3/13/2004 1:32 PM
HML003253	Moulding	Side, G	Sarnish		1 each	\$17.86			\$17.86	DDT .
HSC000466	Spacer	Glass,	10mm (set of 7)		1 each	\$1.63			\$1.63	Inv Gary Hart on 3/14/2004 4:40 PM
HST000359	Strip	Glass,	Sealing		1 each	\$7.27			\$7.27	
Addline	Add NAGS	Item	1				1	Sub Total	\$740.11	PP
MODILING	Mud NMora	THOM:	1					Tax	\$0.00	by David Malone on 3/17/2004 8:58 AM
							Total	Charges	\$740.11	
							D	eductible	\$50.00	
								Total	\$690.11	
										×
									1	
										-1
0										
Save Invoi	ce Notes							Subm	it Invoice	

Invoice Code History View

3.6.3 Finalize an Invoice

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

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

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

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

Owner requested tinting strip to be replaced. Owner noticed that new windshield had solar	Owner was told to contact Insurance company; however, r protection already.	K F
Save Invoice Notes	Submit Invoice]
Inv	voice Notes Box	

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

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

3.6.4 Submit an Invoice

eDirectGlass has several methods for submitting an Invoice for Billing:

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

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Submit Invoice to FARMERS HOME GROUP O Print to local Printer	
Email to Insurance Fax to Insurance	Submit Invoice to Insurance
 O Submit Harmon O Submit Lynx 	Invoice will be submitted electronically
Submit EDI (Safelite) Submit Invoice Cose	Submit Invoice Close

Invoice Submission Methods

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

							Vehicl	e <-
	Ticket#			R	0# [3397339	6	
2004	VIN 1G	1JH52F	147146	781	1 [not co	ded 🚿	1
Chevrolet Cavalier	Liceose 767	7565		State AZ		voice Cod	e / Histor	~
4 Door Sedan		144				ava Un	do	
Lookup venicie	Mileage 122	(11			2	ave on		
Glass ID	Desc	ription			Dim	ension	Invoice	~
DW01192	Windshield, encapsulated				36.5	5 x 57.2		_
Part Id	Description	Qty	Unit	List	0&A	Disc	Net	Ta
DW01192	Windshield GBN	1	each	\$759.60	V	-10%	\$835.5	6 🔽
DW01192	Windshield Labor	2.3	hrs	\$45.00	V	+base	\$203.5	0 🔽
HAH000004	Adhesive 2.0 Urethane,Dam,Prime	r 1	each	\$28.00	V	fiat	\$30.0	0 🔽
					5	Sub Total	\$566.2	6
						Tax	\$22.6	6
Apply Cash Discount					Total	Charges	\$588.9	2
		Subm	nitted to S	tatewide	-			
Deductible Disc. S0.00		Mutual	on 8/31/	2004 9:55 AM	D	eductible	\$50.0	0
		(unect	,			Total	\$538.9	2
						10001		-
Save Invoice Notes								

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

Submitted Invoice Message

3.6.5 Print an Invoice

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

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

) × 🚳 🏝 🛷 T= 100% 🕒] ⊮ ∢[1 of 1	Þ.	M	#	Γ	crystal 🐝
Preview							

Report Viewer Toolbar

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

button.		
	è Print	르 1
	General Options	
	C Select Printer	
	Auto Acrobat Auto Canon Auto HP Canon 5500 Destine on 5520 on LaserJat 41 on GRIEDI2	P Loser Jot 100 PCL 6
	Status: Ready Print to file Location: Comment	Preferences Find Printer
	Page Range C All C Selection C Durrent Page	1 #
	C Pages: 1 Enter either a single page number or a single page range. For example, 512	ور ور
	Print Cancel	Apply

Print Dialogue Box

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

3.6.6 Delete an Invoice

To delete an Invoice in eDirectGlass:

1. Open an Invoice.

Print

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



Delete Invoice Dialogue Box

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

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



4 Message Center

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

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

Message Center
Check Messages
Create Message
Inbox
Outbox
Sent Items
Trash

Message Center Sub Menu

4.1 Check Messages

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

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

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



Review New Message Window

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

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

4.2 Create Message

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

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

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

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

Create	New Message
Claim:	3211456, 2003 Cadillac Escalade
To:	STATEWIDE MUTUAL NEW YORK, NY BII Adjuster
Co:	No
From:	Gary Hart
Subject	Request Info
	×.
	Send Message Now Send Message Later Cancel Message
	Create New Message Box

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

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

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

4.3 Inbox

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

		Inbox	
From	Subject	Claim	Sent
Statewide Mutual	Price Issue	69581316 Patricia Hatteras	10/12/2002 5:24:00 AM
Statewide Mutual	Request Info	67262457 William Britton	10/17/2002 7:44:00 AM
Statewide Mutual	RE:Exception Request	6673737-AZ-76 Paul Turner	10/27/2002 10:29:00 AM
Statewide Mutual	RE:Exception Request	656567 Tom Rogers	10/29/2002 10:48:00 AM
Statewide Mutual	Request Info	654897 Ivan Awfultch	11/6/2002 3:17:00 PM
Statewide Mutual	RE:Exception Request	88272887 Maria Marcus	11/9/2002 9:23:00 AM
Statewide Mutual	RE:Request Info	3211456 John Wayne	3/10/2003 1:12:00 PM
Statewide Mutual	RE:Request Info	03-046644 Marilyn Bullock	10/10/2002 2:44:00 PM
Statewide Mutual	Request Info	382048877 Donald Barretta	10/12/2002 5:33:00 AM
From: Statewide M Subject: Request Info Claim: 382048877 Customer is on va	utuel o Donald Berrette acation. Please schedule	Sent: 10/12/2002 5:33:00 AM a rental car if necessary. Rep	ly with

Inbox Message List and Message Review

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

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



4.4 Outbox

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

	Outbox					
То	Subject	Claim	Sent			
Statewide Mutual	Exception Request	3211456 John Wayne	Not Sent			
To: Statewide Mutual			Sent:			
Subject: Exception Request	Subject: Exception Request					
Claim: 3211456 John Wayne						
Can we add front windshield tinting for a flat \$25.00?						
			3			
Send Delete						

Outbox Message List with Message Review

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

4.5 Sent Items

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

To Subject Claim Sent Statewide Mutual Accepted Invoice 3393922 Mike Planter 8/20/2003 8:27:00 AM Statewide Mutual Request Info Norm Faternton 8/20/2003 8:34:00 AM Statewide Mutual Request Info pnk56794 Alicia Moore 8/20/2003 11:25:00 AM Statewide Mutual Request Info edg2003 Tadiran Electric 8/21/2003 9:09:00 AM Statewide Mutual Request Info 3393922 Mike Planter 8/21/2003 9:19:00 AM Statewide Mutual Request Info 3393922 Mike Planter 8/21/2003 9:12:00 AM Statewide Mutual Request Info 3393922 Mike Planter 8/20/2003 3:25:00 PM			Sent Items	
Statewide Mutual Accepted Invoice 3393922 Mike Planter 8/20/2003 8:27:00 AM Statewide Mutual Request Info Norm Faternton 8/20/2003 8:34:00 AM Statewide Mutual Request Info pnik56794 Alicia Moore 8/20/2003 11:25:00 AM Statewide Mutual Request Info edg2003 Tadiran Electric 8/21/2003 9:09:00 AM Statewide Mutual Request Info 3393922 Mike Planter 8/21/2003 9:12:00 AM Statewide Mutual Request Info 3393922 Mike Planter 8/20/2003 3:25:00 PM	То	Subject	Claim	Sent
Statewide Mutual Request Info Norm Faternton 8/20/2003 8:34:00 AM Statewide Mutual Request Info pnk56794 Alicia Moore 8/20/2003 11:25:00 AM Statewide Mutual Request Info edg2003 Tadiran Electric 8/21/2003 9:09:00 AM Statewide Mutual Request Info 3393922 Mike Planter 8/21/2003 9:12:00 AM Statewide Mutual Request Info 3393922 Mike Planter 8/20/2003 3:25:00 PM To: Statewide Mutual Sent: 8/21/2003 9:12:00 AM Subject: Request Info Subject: Request Info Sent: 8/21/2003 9:12:00 AM	Statewide Mutual	Accepted Invoice	3393922 Mike Planter	8/20/2003 8:27:00 AM
Statewide Mutual Request Info pnk56794 Alicia Moore 8/20/2003 11:25:00 AM Statewide Mutual Request Info edg2003 Tadiran Electric 8/21/2003 9:09:00 AM Statewide Mutual Request Info 3393922 Mike Planter 8/21/2003 9:12:00 AM Statewide Mutual Request Info 3Johnny Knoxville 8/20/2003 3:25:00 PM To: Statewide Mutual Sent: 8/21/2003 9:12:00 AM Subject: Request Info Sent: 8/21/2003 9:12:00 AM	Statewide Mutual	Request Info	Norm Faternton	8/20/2003 8:34:00 AM
Statewide Mutual Request Info edg2003 Tadiran Electric 8/21/2003 9:09:00 AM Statewide Mutual Request Info 3393922 Mike Planter 8/21/2003 9:12:00 AM Statewide Mutual Request Info 3 Johnny Knoxvile 8/20/2003 3:25:00 PM To: Statewide Mutual Sent: 8/21/2003 9:12:00 AM Subject: Request Info Sent: 8/21/2003 9:12:00 AM	Statewide Mutual	Request Info	pnk56794 Alicia Moore	8/20/2003 11:25:00 AM
Statewide Mutual Request Info 3393922 Mike Planter 8/21/2003 9:12:00 AM Statewide Mutual Request Info 3 Johnny Knoxville 8/20/2003 3:25:00 PM To: Statewide Mutual Sent: 8/21/2003 9:12:00 AM Subject: Request Info Claim: 3393922 Mike Planter	Statewide Mutual	Request Info	edg2003 Tadiran Electric	8/21/2003 9:09:00 AM
Statewide Mutual Request Info 3 Johnny Knoxville 8/20/2003 3:25:00 PM To: Statewide Mutual Sent: 8/21/2003 9:12:00 AM Subject: Request Info Claim: 3393922 Mike Planter	Statewide Mutual	Request Info	3393922 Mike Planter	8/21/2003 9:12:00 AM
To: Statewide Mutual Sent: 8/21/2003 9:12:00 AM Subject: Request Info Claim: 3393922 Mike Planter	Statewide Mutual	Request Info	3 Johnny Knoxville	8/20/2003 3:25:00 PM
	To: Statewide Mutual Subject: Request Info Claim: 3393922 Mike Pla	nter	Sent: 8/21/2003 9:12:00 AM	1
······································				

Sent Items Review

4.6 Trash

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

Trash					
From	Subject	Claim	Sent		
Statewide Mutual	REException Request	656567 Tom Rogers	10/29/2002 10:48:00 AM		
To: Pro Auto Glass	Se	ent: 10/29/2002 10:48:00 AM			
Subject: RE:Exception Re	quest				
Claim: 656567 Tom Rog	pers				
Tes for hat tee of 20.0				-	
				~	
				100	

Trash Folder Message Review

You can restore any of the messages in the Trash folder. Open the message and click on the Restore button and the message will be moved to the Inbox.



5 C & V Relationship Mgmt

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

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



C&V Relationship Mgmt Sub Menu

5.1 Owner Contact

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

5.1.1 Working with Owner Contacts

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

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

Company Lest Name First Name Phone ind Existing Contact	Reset	You may enter partial data in one	e or multiple fields	
Company	First Name	Last Hame	Phone	1
	Etop	John	(480) 613-2545	
	Randy	Johnson	(304) 698-7785	
	Ted	Jones	(602) 555-1277	
	Danov	Kave	(480) 555-5553	
	Anthony	Kedis	(480) 333-3333	
	Alan	Keeler	(602) 555-5559	
	Rob	Kelly	(480) 555-5555	
	Clark	Kent	(574) 554-5624	
	Seamus	Keys	(586) 887-7745	
	Avril	Lavione	(480) 445-1246	
	Amy	Lee	(659) 885-4444	
	Jay	Leno	(620) 555-5557	
	Alejandro	Lerner	(548) 547-9995	
	Alfonso	Lewenthal	(602) 555-8700	
	John	Little	(452) 145-2145	
	Howard	Love	(480) 774-5447	
	Sarah	MacLaulin	(858) 659-8173	
	bill	malone	(123) 456-7890	
	David	Malone	(123) 458-7890	
	Harold	Markens	(480) 555-6666	
	Maid	Marrion	(454) 547-5546	
	Stan	Marsh	(602) 544-8874	
	Manny	Matienez	(555) 222-4545	
	Dave	Matthews	(480) 555-5546	
	laha	Massar	(490) 000 0007	

Retrieve Owner Record

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

Company	First Name	Last Name	Phone
Owner Contact Column Headers - Sort Tab			Tabs

5.1.2 Maintaining the Owner Record

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

				New Owner Contact Record
First Name	Tamara	Middle		Primary Phone (480) 725-4687
Last Name	Jones	Prefix	Suffix	Secondary Phone
Address	1455 E 90th St			Fax
Address2				Tax Id
City	Scottsdale	State AZ	Zip 85256	No Tax 🗖
Email				Modified Save Undo
Notes				A.
				_
				*



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

5.1.3 Creating a New Owner Contact

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

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

			New Owner Contact Record
First Name	Middle		Primary Phone
Last Name	Prefix	Suffix	Secondary Phone
Address			Fax
Address2			Tex Id
City	State	Zip	No Tax
Email			Save Undo
Notes			×

New Owner Contact Record

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

5.1.4 Customer Types

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

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

Find Cust	omer Type				
Type					
	Find Type	Add Type	Reset		

Find Customer Type Panel

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

New Customer Type	
Type Description	Disabled 📰
Save Undo	_

New Customer Type Panel

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

New Customer Type		
Type Description	Municipality Save Undo	Disabled 🕅 Modified

New Customer Type Panel Completed

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

	Туре	
Commercial		
Fleet Company	/	
Goverment		
Cash		
Credit		
Municipality		
Edit Type	6 Records	

Find Customer Type List

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

Edit Customer Type		
Type Description Cash		Disabled
Save Undo		
-	Edit Customer Type Pane	əl

 For the purpose of historical data, you can only disable a Customer Type, you can't change the Type Description or delete a Customer Type, you can only disable it. To disable the Customer Type

check the Disabled box and click on the Save button to remove it from the drop down list.
7. To assign a type to a customer, simply open the contact record by click on

C&V Relationship Mgmt, Owner Contact, search for the record and bring up the Owner Contact Record. Select the Customer Type from the drop down menu and click on the Save button to apply the Customer Type to the Owner Contact Record.

Owner	Commercial			Owner Contact Recor
irst Name	Ryan	Middle	1	Primary Phone (852) 741-8562
ast Name	Fort	Prefix	Suffix	Secondary Phone
Address	12 Henry Way			Mobile Phone
Address2				Fax
City	BALTIMORE	State MD	Zip 21222	
Email				Type Credit 👻
Notes				A
				Save Undo
				*

5.2 Insurance Contact

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

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

5.2.1 Working with Insurance Contacts

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

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

Find Existing Insurance Contact				
Insurance				
Last Name				
First Name				
Phone				
Find Existing Contact Reset	You may enter p	artial data in or	ne or multiple fields	
Create New Contact				
Cleare New Conidox				
Company	First Name	Last Name	Phone	
Company STATEMDE MUTUAL	First Ilame Rick	Last Hame Turri	Phone (212) 455-8787	
Company STATEWIDE MUTUAL	First Hame Fick	Last Name Turri	Phone (212) 455-8787	

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

STATEWIDE MUTUAL 1515 ROCKEFELLER PLAZA NEW YORKNY01234 (212) 555-5555	Insurance Contact Record
First Name Rick Middle	Primary Phone (480) 346-1112
Last Name Turri Prefix Suffix	Network? Phone
Address 121 E Here St	Harmon 🕙 Mobile Phone
Address2	Lynx 🗇 Fax (480) 522-3104
City Scottsdale State AZ Zip 85258	Safelite @
Email rick@swmins.com	Quest Modified Save Undo
Agent Id	None 🔘
Agt Number	Safeite PID 12345 -
Agt District	
Notes	*
	-

Insurance Contact Record

5.2.2 Maintaining the Insurance Record

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

						Insu	rance Contact Record
STATEW 1515 ROC NEW YOR (212) 555-	IDE MUTUAL KEFELLER PLAZA KNY01234 5555						
First Name	Rick	Middle				Primary Phone	(480) 346-1112
Last Name	Turri	Prefix	Suffix		Network?	Secondary Phone	
Address	121 E Here St				Harmon 🔘	Mobile Phone	
Address2					Lynx 🔿	Fax	(480) 522-3104
City	Scottsdale	State AZ	Zip 852	58	Safelite 🔍		
Email	rick@swmins.com				Quest 🔊	Modified	Save Undo Delete
Agent Id					None 🔘		
Agt Number					Safelite PID	12345	•
Agt District							
Notes							

Insurance Contact Record

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

5.2.3 Creating a New Insurance Contact

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

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

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

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

Company	Address	City	State
USAA CAS INS CO	9800 FREDERICKSBURG ROAD	SAN ANTONIO	TX
USAA COUNTY MUT INS CO	9800 FREDERICKSBURG ROAD	SAN ANTONIO	TX
USAA GENERAL IND CO	9800 FREDERICKSBURG ROAD	SAN ANTONIO	TX
USAA TEXAS LLOYDS CO	9800 FREDERICKSBURG RD	SAN ANTONIO	TX

Find Insurance Company Window

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

				Insurance	Contact Record
USAA COUNTY MUT INS C 9800 FREDERICKSBURG RI SAN ANTONIOTX78288 (210) 498-2211	DAD				
First Name	Middle			Primary Phone	
Last Name	Prefix	Suffix	Network?	Secondary Phone	
Address			Harmon 💿	Mobile Phone	
Address2			Lynx 🗇	Fax	
City	State	Zip	Safelite 🔿		
Email			Quest 🔿		Save Undo
Agent Id					
Agt Number			Safelite PID		-
Agt District					
Notes				*	
				-	

New Insurance Contact Record

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

red boxes.

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

5.2.4 Maintaining O&A Rules

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

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



Private O&A CRM Profile Detail Window

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



Delete Profile Dialogue Box

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

5.3 Agent Contact

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

5.3.1 Working with Agent Record

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

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

Last Name First Name Phone			
Find Existing Contact Reset Create New Contact Company	You may enter partial da	ta in one or multi	ple fields Phone
Dirt B Gone Car Wash - N 100th St	Ronnie	Seam	(480) 544-1121
Dirt B Gone Car Wash - N 100th St	Timmy	Taylor	(480) 544-1121
Dirt B Gone Car Wash - Shea	Mark	McGrath	(480) 844-8541
Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea	Mark Gwen	McGrath Stefani	(480) 844-8541 (480) 844-8541
Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea	Mark Gwen Rob	McGrath Stefani Thomas	(480) 844-8541 (480) 844-8541 (480) 844-8541
Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea Quiky Mart Lube & Oil	Mark Gwen Rob Fred	McGrath Stefani Thomas Durst	(480) 844-8541 (480) 844-8541 (480) 844-8541 (480) 554-1212
Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea Quiky Mart Lube & Oil Tonys Lube & Oil - FLW	Mark Gwen Rob Fred Robert	McGrath Stefani Thomas Durst Plante	(480) 844-8541 (480) 844-8541 (480) 844-8541 (480) 554-1212 (480) 554-1221

Find Existing Agent Contact Window

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

			Agent	Record	
Company	Dirt B Gone	Car Wash - Shea			Primary Phone (480) 844-8541
Contact	Justin Wax				Secondary Phone
Address	9875 E She	a Blvd			Fax
Address2					Tax Id
City	Scottsdale		State AZ	Zip 85258	No Tax
Email					Save Undo
Notes				,	
First	Name	Last Nam	e	Phone	
Mark		McGrath	(4)	30) 314-9445	
Gwen		Stefani	(4)	80) 945-1445	
Rob		Thomas	(4)	80) 614-1414	
Create N	lew Contact	Retrieve	Contact	2 Decorde	
Greate in	ICH CONDUCT	hourd	Agon	+ Dooord	
			Agen		

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

		Age	ent Contact	
First Name	Mark	Middle Name		Primary Phone (480) 314-9445
Last Name	McGrath	Prefix	Suffix	Secondary Phone
Address	12987 N 100th PI			Fax
Address2				SSN # 999-99-9993
City	Scottsdale	State AZ	Zip 85260	Inactive
Email				Save Undo
Notes				~
				~

Agent Contact Record

5.3.2 Maintaining the Agent Record

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

			Agent	Record	
Company	Dirt B Gone	Car Wash - Shea			Primary Phone (480) 844-8541
Contact	Justin Wax		1		Secondary Phone
Address	9875 E She	a Blvd			Fax
Address2					Tax Id
City	Scottsdale		State AZ	Zip 85258	No Tax
Email					Save Undo
Notes					
Notea					<u>^</u>
					2
First	Name	Last Name		Phone	
Mark		McGrath	(4)	30) 314-9445	
Gwen		Stefani	(4)	80) 945-1445	
Rob		Thomas	(4)	80) 614-1414	
<u> </u>					
Create N	lew Contact	Retrieve C	iontact	3 Records	
			Agen	t Record	

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

5.3.3 **Creating a New Agent Record**

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

	New Agent	Record		
Company			Primary Phon	e
Contact			Secondary Phon	e
Address			Fa	x
Address2			Tax	d
City	State	Zip	No Ta	×
Email			Modified	Save Undo
Notes			3	

New Agent Record Window

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

		New Ager	nt Record	
Company	Quiky Mart Lube & Oil			Primary Phone (480) 554-1212
Contact	Bob Fender			Secondary Phone
Address	8956 N Pima Rd			Fax (480) 554-1213
Address2				Tax Id 86-1313131
City	Scottsdale	State AZ	Zip 85258	No Tax
Email	fender.bob@quikymar	tlube&oil.net		Modified Save Undo
Notes				

Completed New Agent Record Window

5.3.4 Adding Agent Contacts

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

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

Company				
Last Name				
First Name				
Phone				
Find Existing Contact	Reset Yo	ou may enter partial da	ta in one or multi	ple fields
Create New Contact				
Create New Contact Company		First Name	Last Name	Phone
Create New Contact Company Dirt B Gone Car Wash - N 100th St		First Name Ronnie	Last Name Seam	Phone (460) 544-1121
Create New Contact Company Dirt B Gone Car Wash - N 100th St Dirt B Gone Car Wash - Shea		First Name Ronnle Mark	Last Name Seam McGrath	Phone (480) 544-1121 (480) 844-8541
Create New Contact Company Dirt B Gone Car Wash - N 100th St Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea		First Name Ronnia Mark Gwen	Last Name Seam McGrath Stefani	Phone (480) 544-1121 (480) 844-8541 (480) 844-8541
Create New Contact Company Dirt B Gone Car Wash - N 100th St Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea		First Name Ronnie Mark Gwen Rob	Last Name Seam McGrath Stefani Thomas	Phone (480) 544-1121 (480) 844-8541 (480) 844-8541 (480) 844-8541
Create New Contact Company Dirt B Gone Car Wash - N 100th St Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea Quiky Mart Lube & Oil		First Name Ronnie Mark Gwen Rob Fred	Last Name Seam McGrath Stefani Thomas Durst	Phone (480) 544-1121 (480) 844-8541 (480) 844-8541 (480) 554-1212
Create New Contact Company Dirt B Gone Car Wash - N 100th St Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea Dirt B Gone Car Wash - Shea Quiky Mart Lube & Oil Tonys Lube & Oil - FLW		First Name Ronnle Mark Gwen Rob Fred Robert	Last Name Seam McGrath Stefani Thomas Durst Plante	Phone (480) 544-1121 (480) 844-8541 (480) 844-8541 (480) 844-8541 (480) 554-1212 (480) 554-1221

Find Existing Agent Contact Window

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

			Agent	Record		
Company	Dirt B Gone	Car Wash - N 100th			Primary Phone	(480) 544-1121
Contact	Harry Shine	r			Secondary Phone	
Address	10425 N 10	0th St			Fax	
Address2					Tax Id	86-4414444
City	Scottsdale		State AZ	Zip 85259	No Tax	
Email						Save Undo
Notes						
First	Name	Last Name		Phone		
Ronnie		Seam	(48	0) 481-7614		
Create N	lew Contact	Retrieve Co	ntact	1 Record		
		Ag	ent Re	cord Windo)W	

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

	New	Agent Contact	
First Name	Middle Name		Primary Phone
Last Name	Prefix	Suffix	Secondary Phone
Address			Fax
Address2			SSN #
City	State	Zip	Inactive
Email			Save Undo
Notes			~
			_
			\sim

New Agent Contact Window

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

		New /	Agent Conta	ct		
First Name	Timmy	Middle Name			Primary Phone	(602) 957-0135
Last Name	Taylor	Prefix	Suffix		Secondary Phone	
Address	3847 E Thomas F	td.			Fax	
Address2	#214				SSN #	999-99-9991
City	Phoenix	State AZ	Zip 8	5018	Inactive	
Email					Modified	Save Undo
Notes					<	
					×.	

Completed New Agent Contact Window

5.4 Other Contact

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

5.4.1 Working with Other Contacts

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

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

Find Existing Other Contact					
Company Last Name First Name Phone Find Existing Contact Create New Contact	Reset	You may e	enter partial dat	ta in one or multiple fields	
Company	Firs	t Name	Last Hame	Phone	
AAA Car Rental				(555) 212-5236	

Retrieve Other Contact Record

5.4.2 Maintaining the Other Contact Record

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

Owner	 Commercial 		Other Contact Record
Company	AAA Car Rental		Phone (480) 212-5236
Contact	Mike Jones		Secondary Phone
Address	18778 N 82nd St		Fax (480) 656-7878
Address2			Tex Id 887474AZ
City	Scottsdale State AZ	Zip 85257	
Email			Save Undo
Notes	Rental Code 123A		<u>~</u>
			~

Other Contact Record Window

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

130

5.4.3 Creating a New Other Contact

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

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

			New Other Record
Company			Phone
Contact			Secondary Phone
Address			Fax
Address2			Tax Id
City	State	Zip	No Tax
Email			Save, Undo
Notes			*
			-1
			124

New Other Contact Record

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



6 Marketing

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

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



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



6.1 Owner Marketing

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

6.1.1 Working with Owner Marketing

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

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

Status Open C C Find Existing Campai	iosed m Reset You may enter partial data in one or m n	utiple fields	
Code	Hame	Туре	Status
			-
Yp2004	Yellow Pages 2004	YellowPages	Open
Yp2004	Yellow Pages 2004	YellowPages	Open

Retrieve Owner Marketing Campaign

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

New Campaign (Owner Marketing)
Campaign Code R101.5
Campaign Name Phy Radio 101.5 The Zone
Campaign Type TV Yellow Pages Other
Campaign Start 01/01/2004 Campaign End 01/31/2004 Campaign Closed
Standard Offer: 12 Free Dinners or diamond bracelet promotion
Promo Notes
<u>_</u>
Save Undo Modified

Edit Campaign (Owner Marketing) Window

6.1.2 Creating a New Campaign

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

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

New Campaign	(Owner Marketing)
Campaign Code	
Campaign Name	
Campaign Type	Direct Mail Phone Radio TV Yellow Pages Other
Campaign Start	Campaign End Campaign Closed
Promo Notes	X
Save Undo	

New Campaign (Owner Marketing) Window

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

6.1.3 Close an Owner Campaign

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

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

Find Campaign (Owner Marketing)
Type Any Campaign Code Campaign Name
Status Open 🔲 Closed 🔲
Find Existing Campaign Reset You may enter partial data in one or multiple fields
Create New Campaign
Edit Campaign (Owner Marketing)
Campaign Code RadioAD
Campaign Name 96.9 Spot
Campaign Type Radio TV Yellow Pages Other
Campaign Start 2/1/2004 Campaign End 2/29/2004 Campaign Closed 🔽
Promo Notes
Save Undo

Edit Campaign (Owner Marketing) Window - Closed Campaign

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

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

6.2 Agent Marketing

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

6.2.1 Working with Agent Marketing

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

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

Find Campaign (Agent Marketing)			
Type Any Campaign Code Campaign Name			
Status Open 🗌 Closed 🔲			
Find Existing Campaign Reset You may enter partial data in one or multiple fields			
Create New Campaign			
Code Name	Туре	Status	
TMSF Tom Marcha State Farm Agency	Direct Mail	Open	
			-
Paker a lange 1 Locord			

Retrieve Agent Marketing Campaign

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

New Campaign	(Agent Marketing)
Campaign Code	TMSF
Campaign Name	Tom Marcha State Farm Agency
Campaign Type	Direct Mail Phone Appr Other
Campaign Start	01/01/2004 Campaign End 09/30/2004 Campaign Closed
Promo Notes	For all referrals that we receive from this agency, we will discount the job in the form of a rebate to the Agency in the amount of \$25 per referral.
Save Undo	Modified

Edit Campaign (Agent Marketing) Window

6.2.2 Creating an Agent Campaign

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

After you click either button, a blank New Campaign (Agent Marketing) window will display in the Work Area.
New Campaign	n (Agent Marketing)	
Campaign Code		
Campaign Name	e	
Campaign Type	Direct Mail Phone Appr Other	
Campaign Start	Campaign End Campaign Closed	
Promo Notes	4	< >
Save Undo		

New Campaign (Agent Marketing) Window

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

6.2.3 Close an Agent Campaign

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

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

Find Campaign (Agent Marketing)
Type Any Campaign Code Campaign Name
Status Open 🗌 Closed 🔲
Find Existing Campaign Reset You may enter partial data in one or multiple fields
Create New Campaign
Edit Campaign (Agent Marketing)
Compoign Code Mailer
Campaign Name Referral Mailer
Campaign Type Direct Mail Phone Appr Other
Campaign Start 2/8/2004 Campaign End 3/7/2004 Campaign Closed 🔽
S25 off each referral from the agent Promo Notes
Save Undo Modified

Edit Campaign (Agent Marketing) Window - Closed Campaign

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

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

6.3 Fleet/Ins Marketing

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

6.3.1 Working with Fleet/Ins Marketing

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

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

Find Campaign (Fleet	Ins Marketing)			
Type Any	Campaign Code	Campaign Name		
Status Open 🗖 Close	d 🗖			
Find Existing Campaign	Reset	You may enter partial data in one or multiple fields		
Create New Campaign				
Cada		Marrie	Time	Clature
Code		Name	Туре	Status
Code ERAC E	nterprise Rent-A-C	Name	Type Referred	Status Open
Code ERAC E	nterprise Rent-A-C	Name ar	Type Referred	Status Open
ERAC E	nterprise Rent-A-C	Name er	Type Referred	Open Open
Code ERAC E	nterprise Rent-A-C	Name or	Referred	Status Open
ERAC E	nterprise Rent-A-C	Name er	Type Referred	Status Open
Code ERAC E	nterprise Rent-A-C	Name er	Type Referred	Status Open

Retrieve Campaign button to open the Campaign record.

Retrieve Fleet/Ins Marketing Campaign

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

Edit Campaign	(Fleet/Ins Marketing)
Campaign Code	ERAC
Campaign Name	Enterprise Rent-A-Car
Campaign Type	Retered Phone O&A Other
Campaign Start	1/1/2003 Campaign End 12/31/2003 Campaign Closed
	This campaign is setup to track referrals from local ERAC locations.
Promo Notes	
Save Undo	

Edit Campaign (Fleet/Ins Marketing) Window

6.3.2 Creating a Fleet/Ins Campaign

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

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

New Campaign	(Fleet/Ins Marketing)
Campaign Code	
Campaign Name	
Campaign Type	Referred Phone 0&A Other
Campaign Start	Campaign End Campaign Closed
Promo Notes	× ×
Save Undo	

New Campaign (Fleet/Ins Marketing) Window

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

6.3.3 Close a Fleet/Ins Marketing Campaign

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

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

Find Campaign (Fleet-Ins Marketing)
Type Any Campaign Code Campaign Name
Status Open 🗌 Closed 🔲
Find Existing Campaign Reset You may enter partial data in one or multiple fields
Create New Campaign
Edit Campaign (Fleet Ins Marketing)
Campaign Code ERAC
Campaign Name Enterprise Rent-A-Car
Campaign Type Referred Phone 0&A Other
Campaign Start 1/1/2003 Campaign End 12/31/2003 Campaign Closed 🔽
Promo Notes
Save Undo Modified

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

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

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

6.4 Marketing Reports

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



Marketing Reports Sub Menu

Choose a report type from the Sub Menu.

Campaign Reports

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

Owner Report			
Owner By Type 💿	Date from	Campaign	Owner Marketing
Campaign By \$ C	Date to		R101.5 - Phx Radio 101.5 The Zone Yp2004 - Yellow Pages 2004
Status Open 🔽	Closed		Agent Marketing
Show Report			IMSE - Tom Marcha State Fam Agency

Owner Report Window

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

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

Select Printer	1.1
	🚊 🎳 🕯
Auto Acrobat Auto Canon Auto HP Distiller on SS20 on Later Jet 41	Canon SS20 HP Laser Jet
4	
Statur: Ready	Print to file Preferences
Location	Find Printer
Lomment.	
Page Range	
€ AI	Number of copies: 1 🚊
C Selection C Current Page	
C Pages: 1	E Colste
Enter either a single page number or a single page range. For example, 5-12	120 120

Print Dialogue Box

Agent Reports

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

Agent Report			
Agent Company 💿	Agent by Claims 💿	Date from	
Agent Contact 🔘	Agent by \$ 🔘	Date to	
	Show Report		
	Age	ent Report V	Vindow

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

neral Options	
Select Printer	
	🛓 🎳 🛉
Auto Acrobat Auto Canon Auto HP Distiller on SS20 on LaserJet 41	Canon SS20 HP Laser Jet on GREEN2 4100 PCL 6
Location: Comment	Find Printer
Page Bange	
€ AI	Number of copies: 1
C Selection C Current Page	
C Pages: 1	E Colste
Enter either a single page number or a single page range. For example, 5-12	کٹل کٹل

Print Dialogue Box

Fleet/Insurance Reports

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

Insurance Report		
Insurance by Claims	Date from	
Insurance by \$ C	Date to	
Show Report		

Insurance Report Window

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

Select Printer	
	🚊 🎳 🕆
Auto Acrobat Auto Canon Auto HP Distiller on SS20 on LaserJet 41	Canon SS20 HP Laser Jet on GREEN2 4100 PCL 6
<u> </u>	
Status: Ready	Print to file Preferences
Comment:	Find Printer
Page Range	
(F Al	Number of copies: 1 📩
C Selection C Current Page	
C Pages 1	E Colste
Enter either a single page number or a single page range. For example, 5-12	

Print Dialogue Box



7 Accounting

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



7.1 Accounting Overview

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

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

7.2 Post Payment

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

Single Invoice C M	ultiple Invoices					Pos	t Payment
Date 09/05/2007 Am	ount	select type	×		Paid By 📀	Insurance	C Owner
Find Invoice							
Submitted	Owner			Insurance			
Year	Phone			Claim No			
Make	Zip			Invoice No			
Model	VIN						
Find	Reset						

Post Payment Window

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

 Single Invoice (Multiple Invoices				Post Payr	ment
Date 09/07/2007	Amount 50.00	VISA 😺 845485	5	Paid By C I	nsurance 📀 0	wner
Find Invoice						
Submitted	Owner		Insurance			
Year	Phone		Claim No			
Make	Zip		Invoice No	32996		
Model	VIN					
Find	Reset					
	Owner	Invoice	e Amount	Balance	Post Paymer	nt
Maria Grey		32996	\$125.00	\$125.00	50.00	
Maria Grey		32996	\$125.00	\$125.00	50.00	

Apply Payment Window

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

Owner	Invoice	Amount	Balance	Post Payment
Maria Grey	32996	\$125.00	\$75.00	
Apply Payment 1 Record				

Updated Apply Payment Window

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

C Single Invoice Multiple Invoices	Post Payment
	Paid By: Network C Insurance C Owner
Date 04/10/2005 Amount Ch	eck No
Find Invoices	
No Insurance Payor Safelite	
Find Reset	Available Amount 0.00
N A. Itim	la Invision Caraon

Multiple Invoice Screen

7.3 Adjustments/Credits

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

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

Adjust/Credit In	voice	
Date	Owner	Insurance
Year	Phone	Claim No
Make	Zip	Invoice No
Model	VIN	Paid By C Insurance @ Owner
Find	Reset	Only display: 🕅 Adjustments 🛛 Credit Memos
	Adjust/C	rodit Invoice Window

Adjust/Credit Invoice Window

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

button.

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

Date	0		the second se		
Dave	Owner		Insurance		
Year	Phone		Claim No		
Make	Zip		Invoice No		
lodel	VIN				
Find	Reset				
-			Investore 1	Amount	Palamaa
Owner		Insurance	Invoice	Amount	balance
Owner ariton Heston	STATEMDE	Insurance MUTUAL	2508	\$952.22	\$952.22
Owner arton Heston Date (02/20/2005) Set invoice status to S	STATEMDE Amount Adjusted	Insurance MUTUAL	edit memo	\$952.22	\$952.23
Owner arton Heston Date 02/20/2005 Set invoice status to S ason	STATEWOR Amount Adjusted	Insurance EMUTUAL	edit memo	\$952.22	\$952.2

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

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

7.3.1 Credit Memo

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

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

Date	Owner	Insurance
Year	Phone	Claim No
Make	Zip	Invoice No
Model	VIN	Paid By C Insurance (* Owner
Find	Reset	Only display: 🕅 Adjustments 🛛 Credit Memos

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

	ist		No Insurance			
SCOT	TSDALE AZ 85258					
55512	234567					
/	Automobile Informati	n	Insurance Information			
Year:	1997	Sub Total: \$451.40	Policy #		Sub 1	Total: \$0.00
Make:	Acura	Taxes: \$16.55	Claim #		Ta	xes: \$0.00
Mode	t 2.2CL	Gross Total: \$467.95	Agent:	Gross Total: \$0.00		Total: \$0.00
Style:	2 Door Coupe	Deductible: \$0.00	Loss Date:		Deduc	tible: \$0.00
VIN: 1	234567890		Cause:			
Invoi	ce: 2686244	Owner Net Total: \$467.95		Ins/Flee	et Net T	otal: \$0.00
	Partid	Desc	ription	Qty	Unit	Amount
2	FW02008	Windshield		1	EA	\$207.90
	LABOR	Labor		2.3	HRS	\$195.50
2	HAH000448	Adhesive 2.0 Fast-Cure Urethane/)am/Primer	1	FΔ	\$48.00
						340.00
Date	07/05/2013 A	mount Adjusted 0				
Date	07/05/2013 Ar	mount Adjusted0 tus Credit Adjustment 🕅 Neg	ative Payment 🖾 🔿 Adjustm	ent (© Cre	edit Merr	10
Date Rese Reat	07/05/2013 A et invoice submit sta son Credit for uret	mount Adjusted 0 tus Credit Adjustment 🕅 Neg hane	ative Payment 🖾 🔿 Adjustm	ent (© Cre	edit Men	10

Credit Memo Window

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

Message fr	om webpage
0	Are you sure you want to issue a Credit Invoice for \$48.72 ?
	OK Cancel
	Credit Memo Dialogue Box

7.3.2 Reset Invoice Status

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

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

Invoice window will display in the Work Area.

Date	Owner	Insurance
Year	Phone	Claim No
Make	Zip	Invoice No
lodel	VIN	Paid By C Insurance @ Owner
Find	Reset	Only display: 🕅 Adjustments 🛛 Credit Memos

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

Adjust Invoice				
Date Year Make Model Find	Owner Phone Zip VIN esset	Insurance Claim No Invoice No		
Owner	Insurance	Invoice	Amount	Balance
Chariton Heston	STATEWIDE MUTUAL	2508	\$952.22	\$952.22
Date 02/20/2005 A Set invoice status to SUBN Reason Adjust Invoice	Amount Adjusted	Credit memo		8

Adjustment Window

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

7.4 Closed Invoices

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

Date	Owner	Insurance	
Year	Phone	Claim No	
Make	PC	Invoice No	
Model	VIN		

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

7.5 Invoices & Payments for QB

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

7.6 Invoice XML Export

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

Invoice XML	Export						
Date	Owner		Insurance				
Year	Phone		Claim No				
Make	Zip		Invoice No				
Model	VIN						
Find	Reset						
Invoice XML Export Window							

Invoice XML Export Window

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

Owner	Insurance	Invoice	Amount	Balance	
Ted Parker	STATEWIDE MUTUAL	2686484	\$387.00	\$387.00	
Timmy Pointerfluff	STATEWIDE MUTUAL	2789710	\$663.12	\$663.12	1
Tomeka Brown	No Insurance	2879006	\$629.68	\$629.68	
Terry Busterbottom	STATE FARM	2879075	\$472.99	\$472.99	
Gary Hart	STATEWIDE MUTUAL	2989608	\$330.36	\$0.00	i.
test test	No Insurance	3201110	\$269.57	\$269.57	
Bob Suruncle	STATE FARM FLORIDA INS CO	3229996	\$1,109.81	\$1,109.81	
test test	No Insurance	3257712	\$165.75	\$0.00	
Keith Roberts	ALLSTATE INS COMPANY	3282387	\$844.29	\$844.29	1
krystal vea	STATEWIDE MUTUAL	3283110	\$323.49	\$323.49	
alicia stewart	ALLSTATE INS COMPANY	3284355	\$50.00	\$50.00	
henry grey	STATE AUTO B MARKET	3287806	\$866.95	\$866.95	+
4				•	
Select All Submit				17 Invoices	

Select the invoice(s) for XML export then press the Submit button.

Invoice XML Export Selection List



8 Help & Reporting Issues

On-Line Help Manual

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

Live Help

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

You may also send an e-mail to technical support via the

Reporting Bugs

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

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Total Shop Management User Manual

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