

Creating a Desktop Icon

Go to Start > Programs > Data Tranz > then right click on the GlassShop Systems Icon > Click Send To > then Click Desktop create shortcut.

Getting Started

Once you install the demo you will need to fill in your company's information in the setup screen and then click save.

Set up your company				- • •
To get started, go and the information on thi		t		
Company Name	Josh' Glass			
Owner	JOSH			
Address1	345 2nd St N	IE		
Address2				
City,St.Zip	Valley City	ND	58072	
Phone	(800)241-14	93		
Phone2	(000)000-00	00		
Fax	(800)316-58	29		
Tax Labor?				
Tax WS Repr?				
Email Address	sales@datat	ranz.co	m	
Website				
Shop Slogan				
		_		
	Save			Close

Access Codes

Once you purchase the software you will receive Access Codes. Go to Help > Access Codes to input them.

I Access Codes		_ 0 🔀
Valley City ND 58072	S-872567-H	
(800)241-1493 (000)000-0000	N-023551-Q	Please enter codes as instructed by
(800)316-5829 Saving For:	A-048095-R	Data Tranz
JG		
Inventory OFF		
Extract Graphics Terminated	Save System Adr	nin Report Close

Setting up Taxes

- To set up a new tax group go to Admin > General Setup > Tax Rates and Groups
- 1. Select 'Add New' from the first drop down window (number 1)
- 2. Name the group and save

🔳 Tax [Definition
	ect the tax group you wish to edit or select "Add New" to add a group x Group Pelete
2. Add	tax items to define this tax group or select "Add New" to add a new item.
3.	Add Remove Tax Items Rate (%)
	Tax Item 6.500%
	E
	Tax Rate for Tax Group 6.500%
	check to indicate "yes". xactly as it appear in quickbooks if you intend to export data) = retired
	Clear Print Tax Schedules OK

Set up a new tax item for your group

- 1. Select 'Add New' from the second drop down window (number 2)
- 2. Name the item with the corresponding tax rate
- 3. Enter in the corresponding tax rate and Vendor Name
- 4. Save

🔟 Enter Tax Items		- • •
Tax Item Name Corresponding Tax Rate Vendor Name	Sales Tax 6.500% State Tax Commissioner	
state or a city sales tax.	ly associated with a single taxing authority, such a One or more tax items make up a tax group. ıred among groups, making reporting simpler.	s a
	Save	Close

Account Setup

One a blank screen without an invoice open go to Names > Accounts and Pricing Profiles > Account Setup. Click on the lookup button in the upper left corner of the window and select the account you want to modify or choose the account type and enter in the new account name in.

You will want to make sure that you have the following correct in this screen

- 1. Tax Group
- 2. Invoice Requirements
- 3. Chip Repair Rates
- 4. If it is Lynx or Safelite make sure it is correctly marked.
- 5. If it is a Safelite Account make sure to have the correct Insurance ID

ount Setup	- Internet in the second s
Number	Billing Print Periodic Statement C Agent is 'Bill To:'
Address City/State/Zip	C Safelite EDI Account: LTEST99
Primary Phone (000)000-0000 Secondary Phone (000)000-0000 Phone Fax (000)000-0000 Contact Person (000)00-0000	Invoice Requirements Purchase Order VIN No. Stock Agent Name Mileage Revent of Loss of Cause of Loss
Tax Information Resale number Tax ID number 00-0000000	Referral
Tax Group (save account first) Tax Group	Windshield Repairs 50.00 One 50.00 Two 60.00 Three 70.00
Comments Display when account activated on order.	Four 0.00 Long Crack 0.00
Invoice Comment:	- Retail Discounts
Salesperson	Uems 0.0% Lator 0.0%
LOCK ACCOUNT (prevents saving invoices and work orders)	
Delete 🕒 Sales History Account History Save	Save and New Discounts and Rates Close

Discounts and Rates

Fill in the information in this window to match the rates on your job assignment sheet and then click save.

ccount Discou	ints and Rate	:5				
	- Domest			—— Foreig		Hourly Labor Rate
	regular		% disc regu		100	
Laminated	150002					
Tempered	15.000%	15.000%		5.000% 15.	000%	
Kits						
HW / MLDG		_		_		
Labor (shop)		_		_		hr.
Labor (mobile				_		/hr.
		Set Labor Fla			Kits	Prices
	Domes shop	tic mobile	Fore shop	aign mobile	Amt.	Regular High Modulus Conductive Fast Cure
w/s	100.00	100.00	100.00	100.00	1	20.00
Door	100.00	100.00	100.00	100.00	1.5	20.00
Back	100.00	100.00	100.00	100.00	2	20.00
Qtr.	100.00	100.00	100.00	100.00	2.5	20.00
Partition	100.00	100.00	100.00	100.00	3	20.00
Roof	100.00	100.00	100.00	100.00		
Side	100.00	100.00	100.00	100.00		et All Flat to:
Slider	100.00	100.00	100.00	100.00		et All Flat to:
Vent	100.00	100.00	100.00	100.00	Cle	ear Flat Rates
Some accounts	s may require: Use flat rate or	for first		(Dom. / For.) hi Use flat rate +		ien use hourly rate. Try-out
Copy in pricin	ıg from this a	iccount: <u></u>	ALLSTATE	Save		

Making a Noninsurance Invoice for Glass Replacement

- 1. Click on Orders > Create Auto Quote, Work Order, or Invoice
- 2. Select the Year, Make, Model, and Body Style of the Vehicle
- 3. Then choose the account you will be doing the job for.
- 4. Then select the glass you are replacing and any hardware if needed
- 5. Adjust the pricing if needed
- 6. Next fill in the customer information in the lower right corner.
- 7. Click Save
- 8. Print

🖬 QuickQuote 🛛	200)5 👻 Ford	•	F Series		 2DSPR0 	CB F SER	IESF150		•	2. Choose	Account	103		56,130
NAGS Glass	Misc Parts	Misc Labe	or 🔘 Rec	eipts 🔘	Inventory	Authori	izations	NAGS	+ +	L	CASH WA	I K-IN			
DW01551GTYN	Windshield (sol	ar)[W/Third Visor	Frit)(Aftermark)	et) 04-08		0.0	00 2.80	872.80	216.40						
OW01551GTNN	Windshield (sol	ar)(W/Third Visor	Frit)(Aftermark	an 04.08		0	00 2.80	0.00	216.40						G
ow of contract of the	the indistribution () and	ang waaring waar	i ngjerovinano	50,04,00			00 2.00	0.00	210.40	CAS	SH WALK-IN	4			-
DW01551GBYN	Windshield (sol	ar)(W/Third Visor	Frit)(Aftermark	et) 04-08		0.1	00 2.80	937.55	216.40			🖄 eMail	Salespe	rson	
													Cause of	Loss	
DW01551GBNN	Windshield (sol	ar)(W/Third Visor	Frit)(Aftermark)	et) 04-08		0.1	00 2.80	0.00	216.40			Contact			
												PO Nbr.			
DW01548GTYN	Windshield (sol	ar)[W/Third Visor	Frit) 04-08			0.1	00 2.80	911.30	216.40			Stock			
												License			
DW01548GTNN	Windshield (sol	ar)(W/Third Visor	Frit) 04-08			0.1	00 2.80	0.00	205.80			Mileage VIN	-		
										-		AUTH			
										•		DOL			
									E			Policy			
										-		Agent)		
🖬 ALL HW 🔍	🖌 🚯 View Vehi	cle View Part	Bemove		\dd I	ntcha R	&I Ma	terials R	ecycle	Labor	n l	REF#			
🚽 S Part & Descripti		. Д	1	Glasis	PO Nun			Labor	List Dis		Net	Cus	tomer / In	sured	
		ar)(W/Third Visor F	Frit)[Aftermark@		10110	1	20.00 1		216.40 00.		216.40	1st/last	Josh	Holm	
-		~										Add1	😻 146 2n	d Ave NE	
												Add2			
													VALLEY C		
Check box to:	🕄 Make PNA F	0 Make PO	Authorize	?			\$	< < W/	6 Repair >	-	0.00	St/Post		58072	
Install Locatio			Vehicle Col			Tax	Group		▼ 6.500	%	15.37	Phone1 Phone2)845-5252 1000-0000	
Bus, / Pers.	•	Mobile		JI	<u> </u>				Deductib	oleì		Friunez		1000-0000	
Install At 💐			Advertising		-				(Promoti			1 dA	(000	,	
City, ST, ZIP					•				To	tal	351.77			O quote	
LIQ, 51, ZIP			Job Status		-			Invo	ice Balan	ce			Save	work order	r
Cross Street			12:45:22 P	м			1	ID U	G-0110-0	0001				 invoice 	
Cross Street	0)000-0000														
Cross Street	0)000-0000	^	Sched 1/1	0/2011			Ċ					🛃 Si	chedule	Run Cr	edit Ca

Making a Noninsurance Invoice for Glass Repair

- 1. Click on Orders > Create Auto Quote, Work Order, or Invoice
- 2. Select the Year, Make, Model, and Body Style of the Vehicle
- 3. Then choose the account you will be doing the job for.
- 4. Then select the number of repairs from the W/S Repair drop down menu
- 5. Adjust the pricing if need be by clicking on the \$ button
- 6. Next fill in the customer information in the lower right corner.
- 7. Click Save
- 8. Print

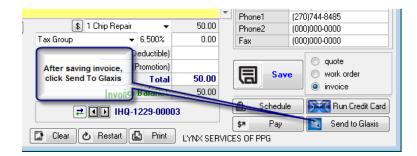
Insurance Invoicing

When you create an invoice for Lynx or safe you will make the invoice the exact same way, but there will be required fields that come up and they will be highlighted in blue.

Sending Invoices to Lynx (feature not enabled in demo mode)

The first step to invoicing to Lynx through Glaxis to setup your Glaxis User Specifications, go to Admin > Online Partners > Glaxis Setup. Enter in your Username, Password, Origination PID, and Network Address; this information will be emailed to you from Data Tranz.

After you have saved your information you can create an invoice for any of your Lynx Accounts. Once you have saved the invoice click the Send to Glaxis button in the lower right corner of your Order Entry Window.



You can check the status of your invoices by going to Orders > Glaxis Invoice Acknowledgements. When the window opens a black dos screen should open slowly scroll through and then close (the system is currently download your responses from Glaxis). After the dos screen closes click the Refresh button and let the black dos screen roll through and close to fill the response messages into your Glaxis Acknowledgement window. You should now see that your invoice was sent to Glaxis. If you go back into your software the next day after sending your invoice you will see an Accepted or Rejected notice on your invoice. If the invoice is rejected you will be able to click on the blue rejection notice to see the reason the invoice was rejected, then click the open invoice button and correct the invoice, save it, then click Send to Glaxis.

Search by Dis	patch	So	t By Date	▼ Re	fresh
Dispatch	Invoice	Date	Time	Total	Result
333238117	29654	3/13/2009	9:24:00 AM	70.78	Invoice Accepted
	1				
333246152	1207730	3/13/2009	9:24:00 AM	621.37	Invoice Accepted
333257413	1340	3/13/2009	9:24:00 AM	153.02	Invoice Accepted
					·
333298934	1355	3/13/2009	9:24:00 AM	222.82	Invoice Accepted
	1				
333309928	1352	3/13/2009	9:24:00 AM	178.77	Invoice Accepted
333314956	4956	3/13/2009	9:24:00 AM	50.00	Invoice Accepted
333316681	73758	3/13/2009	9:24:00 AM	252.27	Invoice Rejected
					click here for rejected part details
333322134	520931	3/13/2009	9:24:00 AM	50.00	Invoice Accepted
333328647	8647	3/13/2009	9:24:00 AM	369.11	Invoice Accepted
333382358	14778	3/13/2009	9:24:00 AM		Invoice Rejected
333388003	20965	3/13/2009	9:24:00 AM	IN on Policy F 200.67	Record; click here for rejected part details Invoice Accepted
333368003	20365	3/13/2009	3:24:00 AM	200.67	Invoice Accepted
333405137	27687	3/13/2009	9:24:00 AM	59.00	Invoice Accepted

Sending Invoices to Safelite (feature not enabled in demo mode)

The first thing to do is make sure you have a Safelite Parent ID Number. You can check for this by going to Admin > General Setup > This Shop's Particulars. If you don't have one email Shop Care at ShopCare@SGCNetwork.com.

Once you have created an invoice under a Safelite account go to EDI > Send Invoices via EDI. First click the Safelite button, then you will need to chose how you will send the file. If you have Outlook, Outlook Express, Windows Mail, or Thunderbird the best way to send is via Internet Email. Simple click Internet Email and then click yes to the next message. Then open your mail program and check for an email from Data Tranz letting you know we received your email.

If you use a web based email you can just send via FTP. Simply click FTP and then minimize the web browser and the click yes to the message asking if you are connected to the internet.

Account	Invoice Number	Auth / Dispatch	Balance	Send
ALLIED INSURANCE	JG-0413-00005	123456	75.00	
Create output file(s).				
Create output file(s).				
	ftp (n	equires active Internet c	connection)	
Safelite		equires active Internet c equires MAPI enabled e	,	
Safelite 2. Send file(s). via one of			,	
Safelite 2. Send file(s). via one of these methods		, equires MAPI enabled e ve files	,	

Paying an Invoice

Glass Shop will allow you to pay an invoice using cash, check, or credit card. All orders must be saved as an invoice before you can make a payment. You can keep track of unpaid invoices by using the Unpaid Invoices feature under the Orders Menu. The pay button is located on the order entry screen directly under the save button. After you click on the pay button you will need to choose your Pay Method.

Document#	(Customer	Invoiced	By
IJG-0110-000	01 C	CASH WALK-IN	admin	1/12/2011
Customer Zip	58072			
Pay Method	Cash	•		
			invoice amt.	351.77
			invoice balance	0.00
			TENDERED	\$0.00
			CHANGE	\$0.00
			-	Full Payment
Cash	🚽 admin	1/12/201	1 Cash	351.77 🔺
Casn	,	1/12/201	1 Cash	351.77
Lasn	admiri	1/12/201	1 Cash	351.77
	- admin	1/12/201	1 Cash	351.77 ×
Cancel	Detai			E

Paying Multiple Invoices from One Payment

If you receive a check, credit card, or electronic payment from an account for multiple invoices you can pay them all quickly by going to Admin > Accounts Receivables > Apply Payments.

Choose the Account you received the payment from then fill in the check or transaction number, and then enter in the payment amount. Left click in the apply field on the invoices you would like to mark as paid. Once you have finished marking the invoices paid click Post.

		IED INSUR		Check Nun 10000154		check amount 622.43	admin		Click below to apply the check amour	
ecord	on:	4/13/2010) 🏢	Sort by	:		•		to one or mor invoices.	
	IV	#	Date	By		Check #	Total	Balance	Apply:	
IJG	-0413	3-00006	4/13/2010	admin	1	0000154	75.00	0.00	75.00	^
IJG	-0413	3-00005	4/13/2010	admin	1	0000154	75.00	0.00	75.00	
IJG	-0413	3-00007	4/13/2010	admin	1	0000154	472.43	0.00	472.43	
										E
										-
	mer					de albert de carl	left on th	nis check	0.00	
Previ	ous	Balance	0.0	00 🔄 sha	ow de	ductible invoices		standing	0.00	

Making Statements

You can create monthly statements for any account in GlassShop that is set to print periodic statements. This option is located in the account setup screen in the upper right corner of the Account Setup window. After you have set your account to Print Periodic Statements you can create your Statements by going to Admin > Accounts Receivable > Make Statements.

reject zero balance accounts	Add Range: <<< Account Type :	>>> <u>•</u>	
105 FLAT GLASS SELLER		210.44	
112 Geico		236.10	
101 LYNX SERVICES OF PPG		6,020.17	
100 QUOTE MASTER	Atlanta	4,276.17	
121 U Haul		130.00	
		-	
Accounts to Print: 1	Add Remove Add A	u I	
U Haul			er Perio
o nau	-	Select Month	
		April	2
		April or Select Day(s	
		or Select Day(s	:)
		or Select Day(s)
		or Select Day(s)
		or Select Day(s)
		or Select Day(s From 4/1/2009 To: 4/30/2005)
		or Select Day(s)
		or Select Day(s From 4/1/2009 To: 4/30/2005)

Once in the Periodic Statement window choose which accounts you would like to print statements for and add them to the Accounts to Print list. Then select your date range you would like to print statements for and then click Print.

Daily Deposit Report

Now that you can pay invoice you will want to generate a report at the end of the day to help keep track of the amount of money you took in a day. You can now print that a report that will show the total amount you received in a day and it will break it down for you by payment type. The Daily Deposit Report is can be found under Admin > Accounts Receivable > Daily Deposits.

Daily Deposit for:	04052005	Thru: 4/9/2009	II or	choose period:	Today	•
Invoice #	Account	Inv Dat		Check #	Amount Rec'd	Multi Pmt
Iww-0211-00209	Geico	2/11/2009	4/9/2009	85214796	219.1	0 🔽
IWW-0127-00205	QUOTE MASTER	1/27/2009	4/9/2009	Cash	369.9	8 🔽
IWW-1126-00191	LYNX SERVICES OF	PPG 11/26/2008	4/9/2009	C-Card	4,177.0	18 🔽
					Cash 3	69.98
					ousii	19.10
					CHECK -	
					Credit 4,1	77.08

Unpaid Invoice Report

GlassShop stores a list of all unpaid invoices under Orders > Unpaid Invoices. You can open invoice from this screen and mark them as paid. You can also resend Lynx invoices from this window.

nvoice Number	Date	Account Name		EDI	P0 Number	Stmt / EDI Date	By By	Invoice Amt.	Balance
D0A-1206-00006	12/6/2010	ALLSTATE	118			0/0/0000	admin	100.00	100.00
0A-1118-00001	11/18/2010	CASH WALK-IN	103	Г		0/0/0000	admin	373.72	373.72
0A-1118-00002	11/18/2010	CASH WALK-IN	103			0/0/0000	admin	65.00	65.00
DA-1118-00003	11/18/2010	ALLSTATE	118	◄		0/0/0000	admin	258.18	258.18
0A-1118-00003	11/18/2010	ALLSTATE	118			0/0/0000	admin	100.00	100.00
DA-1118-00005	11/18/2010	CASH WALK-IN	103	Г		0/0/0000	admin	152.85	152.85
· ·	0/0/0000	CASH WALK-IN	103			0/0/0000		0.00	0.00
DA-1206-00006	12/6/2010	ALLSTATE	118			0/0/0000	admin	160.12	160.12
DA-1228-00007	12/28/2010	ALLSTATE	118	7		0/0/0000	admin	70.00	70.00
DA-0112-00008	1/12/2011	ALLIED INSURANCE	195			0/0/0000	admin	65.00	65.00
A 0110 00000	1/12/2011	AMICA	208	7		0/0/0000	admin	1,048.41	1,048.41
0A-0112-00009	1/12/2011	Amon	200	1.					
ua-u 12-00009	17/2/2011								
ort by: Invoice N		Anitos				To	tal Recei	vable	2,393.26

Collections Management

GlassShop has a report you can run to check and see what accounts are behind. Go to Admin > Accounts Receivables > Collections Management.

All Accou	nts 💌	Omit zero balance					
Number	Account	1-30	30-60	60-90	90-120	120+	Total
	ALLSTATE	70.00	418.30	0.00	0.00	0.00	488.30 🔺
103	CASH WALK-IN	0.00	591.57	0.00	0.00	0.00	591.57

Searching Payments

You can look up payments under Admin > Accounts Receivables > Search Payments.

Start Date		Stop Date		or choose m	onth		•
			ord to show deta				
Invoice Number				Rec'd Date			
0A-1118-00004	CASH WAI			27/2010 C-C	ard	65.00	65.0
		0000 0000 0000 00	00 0/0/00	100		multiple pmt	s
Payment Method							
Payment Method Credit Card			- Search I	by			
Credit Card			Search I	-		0004	
Credit Card Card Number			Check Num	ber		0004	
Credit Card Card Number Expires				ber	[0004	
Credit Card Card Number Expires Authorization			Check Num	ber	[0004	
Credit Card Card Number Expires			Check Num	ber		0004	
Credit Card Card Number Expires Authorization			Check Num	ber		0004	

Sales Report Generator

GlassShop will generate many different sales reports under Admin > Accounts Receivable > Sales Report Generator.

First choose the date range and then choose what to generate the report on.

Sales Report Generator			- • •
	Enter Dates or Se	lect Period:	
Start Date 1/1/2011	Stop Date 1/31/2011	Or Choose Day(s)	Or Month January 🗸
	Generate Report Bas	^	
	Or Generate Item Sa	les Report On:	•
Print to: (optional)	ID Printer Nam	e]
	Print		Close

Tax Reports

Go to Admin > Accounts Receivables > Tax Reporting

Choose the type of invoices you want to generate the report based on, then the date range, and then report type.

– Choose Type –						
Report	by all invoices wit	hin the period	▼ Include2	Zero Tax Invoices		
– Choose Date Rar	nge					
from: 1/1/2011	🏥 to:	1/31/2011	or select month:	January	•	
Invoice Number	Tax Group	Tax Ite	em (agency)	Original Tax \$	Amt. Rec'd / Invoice Total	
ISG-0118-00003	Tax Group	Tax Item		48.36	0.00	
						-
– Print Results –	Detail Report	With More Details		Invoice N	lumber 👻	
	List Report			Clear		

Setting up the Scheduler

To setup the scheduler go to Admin > Scheduling > Setup Scheduler.

To set you standard scheduling times first select the day and then fill in the earliest time and latest time you would schedule a job for that day, then enter in the amount of time in between each job. After the information is filled in for the day click "Save This Day" and then schedule the next day.

You will also need to enter in your techs or locations you will install the glass.

Technician or Bay	Initialize Site, Day, and Times Day Sunday Hisrotay Tues day Last Job 4:00:00 PM Increment by 60 min. Friday Saturday Save this Day	8:00:00 AM 9:00:00 AM 10:00:00 AM 11:00:00 AM 12:00:00 PM 2:00:00 PM 4:00:00 PM 4:00:00 PM
E	Don't schedule this site	Remove

Once you have save a work order you can schedule the job. The schedule button is located just below the save button on the order entry screen.



Then choose the date, time, and installer then click the assign button.

Assign WJG-0511-00001	Jump to date:	III Reserv	e Next Time Sh
Add Note	sump to date.		s Next Time Si
B-TUE 5/11/2010			
E- 8:00:00 AM			
B- In Shop			
H-Mobile			
tt Josh			
Herb			
9:30:00 AM			
In Shop			
- Mobile			
😟 Josh			
😟 Herb			
11:00:00 AM			
😥 In Shop			
🗊 - Mobile			
🕀 - Josh			
😟 - Herb			
E 12:30:00 PM			
🕮 In Shop			
(i) - Mobile			
😥 Josh			
⊞-Herb			
= 2:00:00 PM			
In Shop Mobile			
H- Josh			
Herb			
H-Herb			

Pilkington Price Quoting and Ordering

The first thing you will need to do to order from Pilkington is to contact your local sales representative and let them know that you have software from Data Tranz and you need a user name and password for ordering. Once you get the user name and passwords go to Admin > Online Partners > Pilkington Setup and fill in the information you got from Karen.

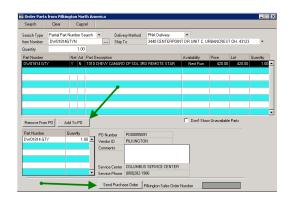
To get a quote from Pilkington for a part simply select a part and then click the Pilkington button.

🖬 2010 Chevrole	et Silverado 2DXCB P	PICKUP K1500	0											_ 🗆 ×
🔲 QuickQuote	(7) 2010 •	Chevrolet	 Silve 	rado	 2DXC 	B PICKUP	P K1500		•	M. Choose	Account	100		61,248
NAGS Glass	C Misc Parts C	Misc Labor	C Receipts	C Invent	ory C Aut	horizations	NAGS			QUOTE M	ASTER			
DQ11175GTNN	Quarter (left)[solar][M	ovable) 07-10			2	14.65 1.7	0.00	214.65	-	-				-
DQ11174YPNN	Quarter (right)(solar)()	dovable) 07-10				0.00 1.7	0.00	220.65						•
											🖄 eMa	100		-
DQ11174GTNN	Quarter (right)/solar)(h	rovable] 07-10				0.00 1.7	0 0.00	214.65				Cause	of Loss	-
DD11164GTNN	Door lieftiffrontilsolar	07.10				0.00 2.1	0 0.00	206.70			Contact			
ob motanin	Proprintentinon all sona	10/10				0.00 2.1	0 0.00	200.10			PO Nbr.			
DD11163GTNN	Door (right)(front)(sole	v) 07-10				0.00 2.1	0 0.00	206.70			Stock			
											License Mileage	_		
DB11388YPYN	Back Window (cente	r][slider][solar] i	Power)(0E) 07-1	0		0.00 0.0	0.00	352.70			VIN			
											AUTH			
15943271	Moulding (1) RIGH	T OUTER Litt	Gate (GM)				3	75.61	-		DOL			
25865734	Moulding (I) RIGH						4	24.58			Policy			
15844877	Motor (M) RIGHT						6	133.96	-		Agent			
25885885	Regulator (M) RIG	IHT INNER LIN	I Gate (GM)				5	121.48	-		REF#			
ALL HW .	View Vehicle	View Part	Bemove	Add	Intchg	PAd	Polish La	bor to it	VINETC	Ы				
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To create a PO for Pilkington add the part you need to your order and then check the box to the left of the part and click make PNA PO.

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W01814GTYN	Windshield (sola	rilW/Third Viso	r Fritifw//Remo	te Start) 10-1	0	4	15.00	3.30	0.00	786.40				
W01813GTYN	Windshield (sola	rilW/Third Viso	r Frit) 10-10				0.00	3.30	0.00	722.65	I			
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0011718GTYN	Quarter (right)(er	ncapsulated((so	lar) 10-10				0.00	1.90	0.00	461.80		Contact		
												PO Nbr.		
D11717GTNN	Door (left)(front)	solar) 10-10					0.00	1.40	0.00	353.60		Stock License		
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D11716GTNN	Door (right)(fron)	lisolar) 10-10					0.00	1.40	0.00	353.60		VIN		
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IAH000004	Adhesive (I)								0	22.95 🔺		DOL		
IAH000448	Adhesive (I)								0	42.50		Policy		
2219252	Cover(M) L	ift Gate (GM) UPPER Right							9	3.42		Agent		
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Then in the next window click add to PO and then click send PO you will then get a Pilkington sales order number to confirm the order.



Exporting To Quick Books

The first step to exporting invoices is to go into your Quick Books and setup your tax groups and items to match GlassShop exactly. You can print your tax schedule by going to Admin > General Setup > Tax Rates and Groups.

Then go to Admin > Export to Quickbooks and click Export. If you get an error about a tax group it is because all of your invoices do not have a tax group, if you aren't charging tax you still have to use the exempt group.

Export to Quickbooks	- 0 🖻
1: Press "Export" to export all new invoices, (this may take some time) Export	Works with ALL versions of QuickBooks
or select an export batch from this drop down list then pres <- None >>	s "Export".
2: Start QuickBooks and choose File > Import > Invoices	Not past this date:
2. Start Queebooks and choose the simport's involces	1/12/2011 🏢
File Exported:	1/12/2011 🔢

Then go into your Quick Books and go to File > Import > IIF file and then import the files generated in GlassShop.

User Setup

The first step to setting up user security is to setup your new users. To setup a new user go to Admin > Security > User Setup enter in the required information and then save the user.

UserID	Josh	
Password	password	
User Name	Josh	

You will need to assign a department to your new user so that they can access the system. To set their access level go to Admin > Security > User Departments. Click the 3 dot box in the upper left hand corner to pull up a list of the users you have setup in your system. Then select the user you want to assign a department to. The user departments for Pro are 82, 83, 84, and 85. The higher the number the less access they will have.

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Backing up GlassShop is Easy

You should backup your GlassShop System weekly.

The best way to do this with a USB Flash Drive that is 1 GB or larger. Having a flash drives allows you to overwrite the old backups. We believe that using a flash drive will be more dependable than using a CD or DVD.

The first step to backing up the program will be exiting the GlassShop system. Then double click on My Computer of Computer depending on what operating system you are using. Once you have opened my computer double click on your C: drive. You will now see the dextr folder that contains your program and all of the data. Then right click on the dextr folder with your mouse, click on send to. This will bring up a list of options on where to send a copy of the dextr folder. You will need to find your USB drive in the list and then left click on it.

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The copying window will closed once it has finished.

Anti Virus and Firewall

We use Microsoft Security Essentials, CA, and Trend Micro for our Anti Virus and Anti Spyware programs

Some firewalls can cause issues with the DTCOMM Service.

If you have issues sending invoices and receiving Work Assignments please check your firewall settings to make sure that DTCOMM is not being blocked by your fire wall.

The following website will help you add DTCOMM to the allowed list of programs going through your firewall.

http://kb.mozillazine.org/Firewalls