GlassShop Systems Version 10

Manual

DataTranz
Data Systems for Business

support@datatranz.com

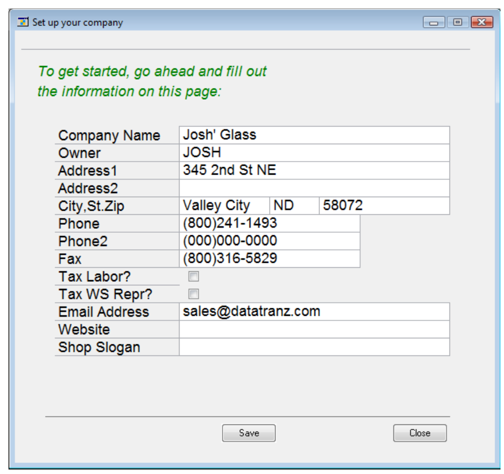
1-800-241-1493

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.

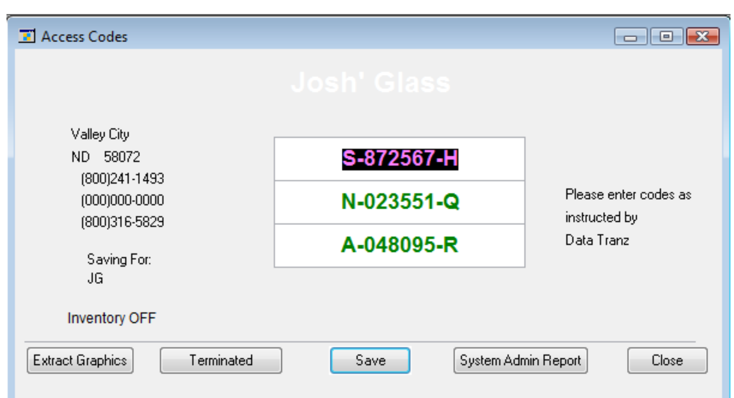
Getting Started

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



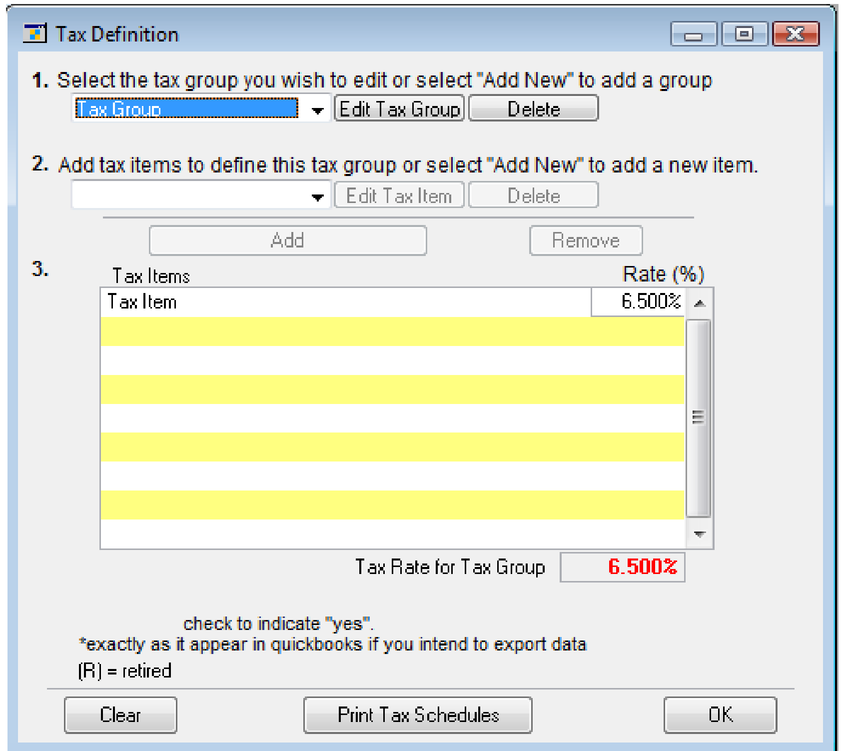
Access Codes

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

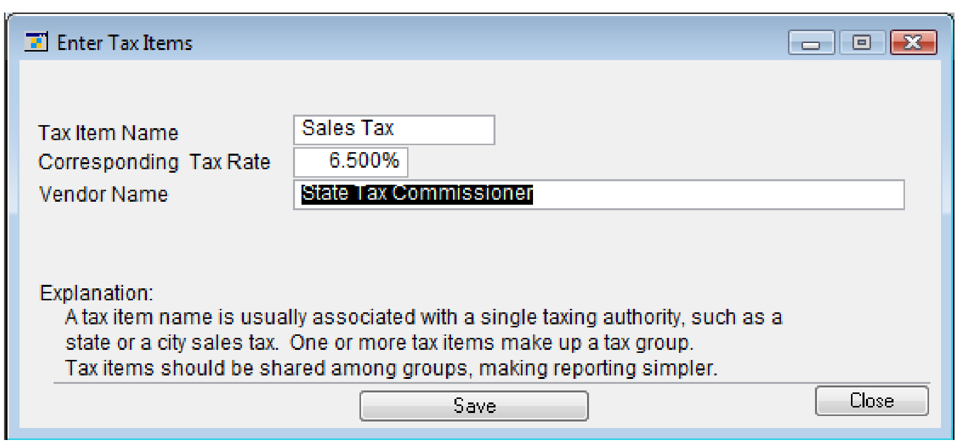


Setting up Taxes

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



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

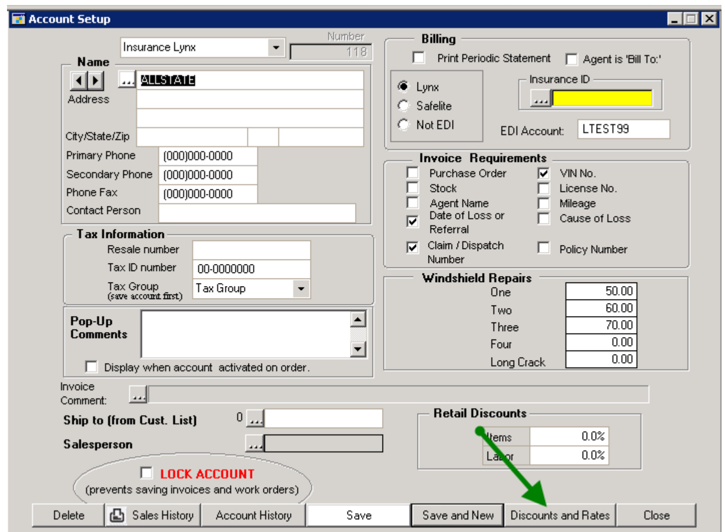


Account Setup

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.

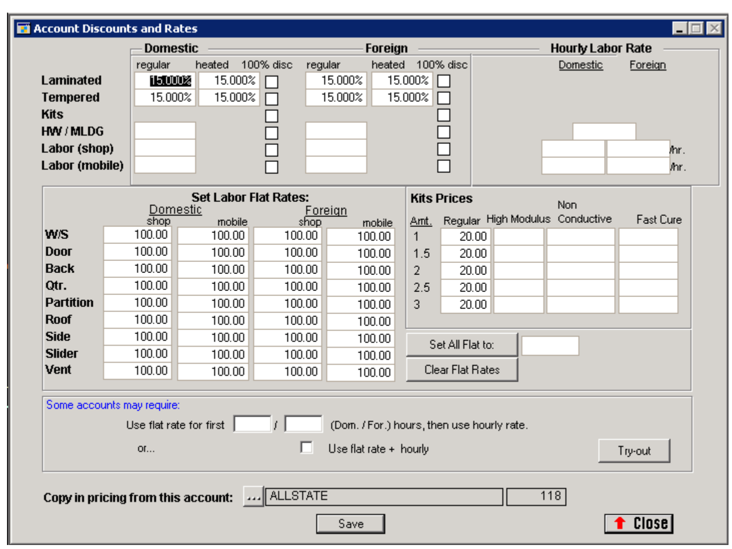
You will want to make sure that you have the following correct in this screen

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



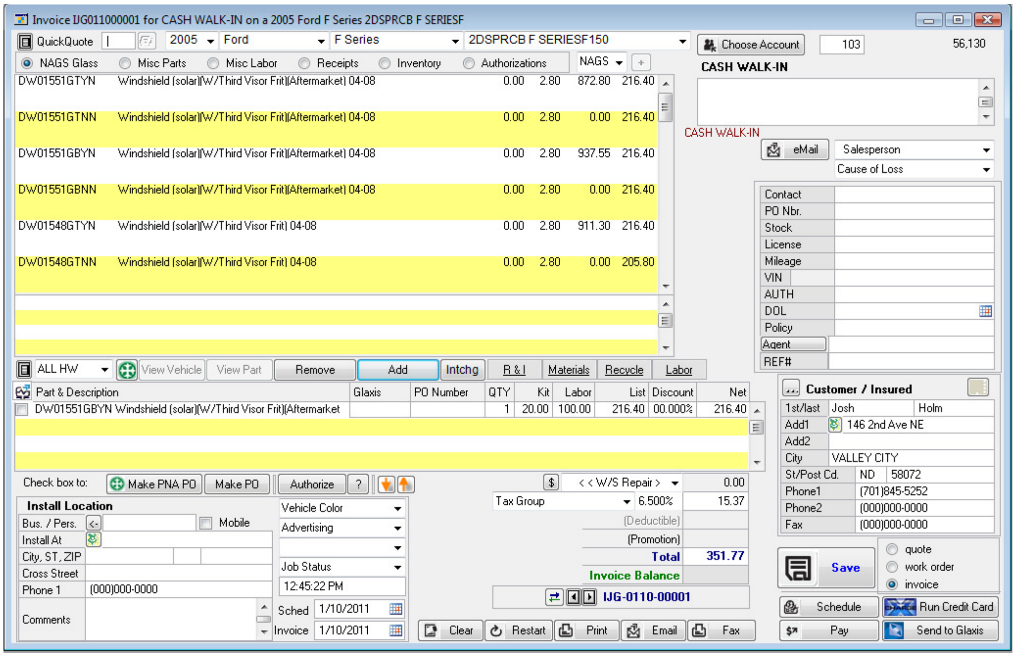
Discounts and Rates

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



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

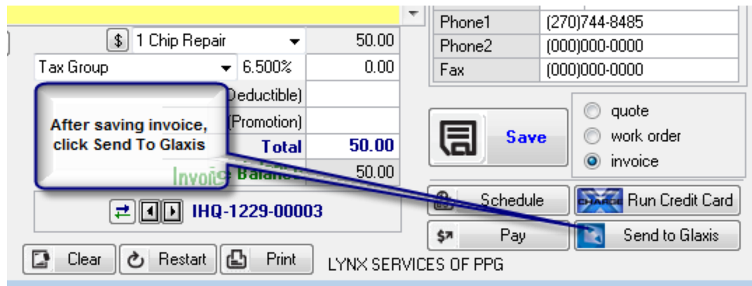
Insurance Invoicing

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.

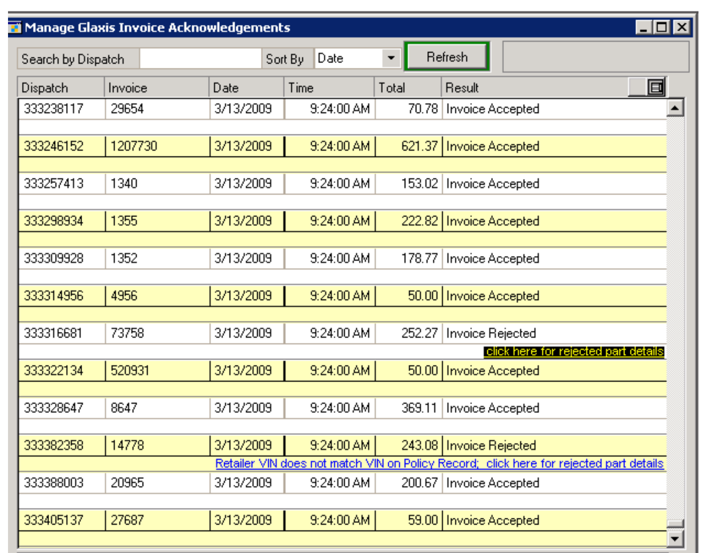
Sending Invoices to Lynx (feature not enabled in demo mode)

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.

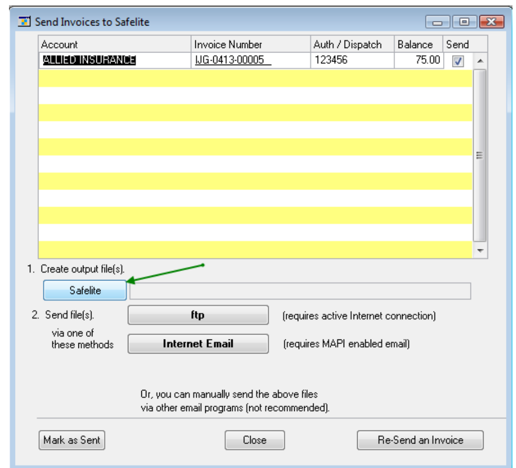


Sending Invoices to Safelite (feature not enabled in demo mode)

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 .

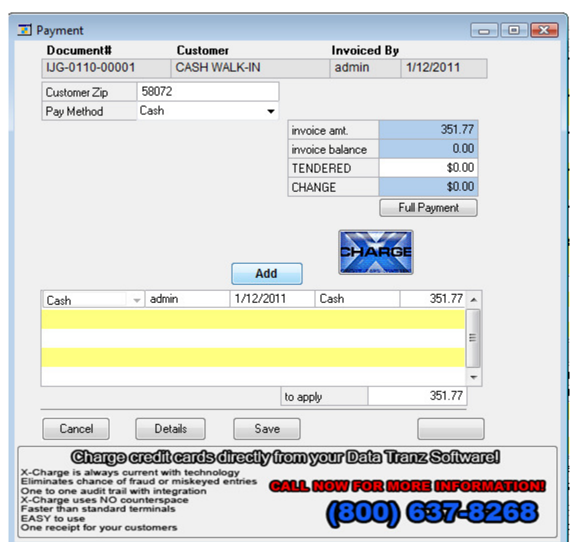
Once you have created an invoice under a Safelite account go to EDI > Send Invoices via EDI. First click the Safelite button, then you will need to chose how you will send the file. If you have Outlook, Outlook Express, Windows Mail, or Thunderbird the best way to send is via Internet Email. Simple click 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.



Paying an Invoice

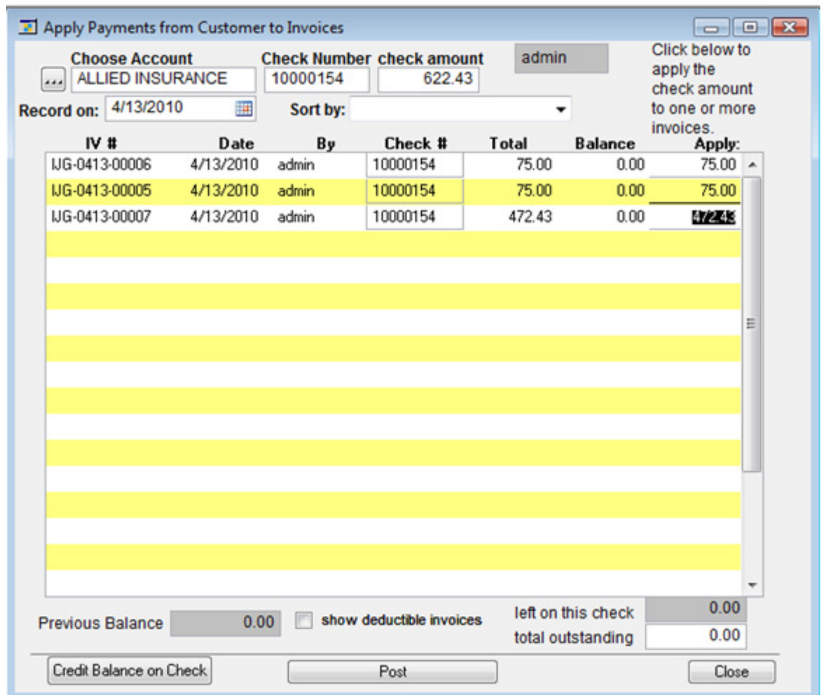
Glass Shop will allow you to pay an invoice using cash, check, or credit card. All orders must be saved as an invoice before you can make a payment. You can keep track of unpaid invoices by using the Unpaid Invoices feature under the Orders Menu. The pay button is located on the order entry screen directly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



Paying Multiple Invoices from One Payment

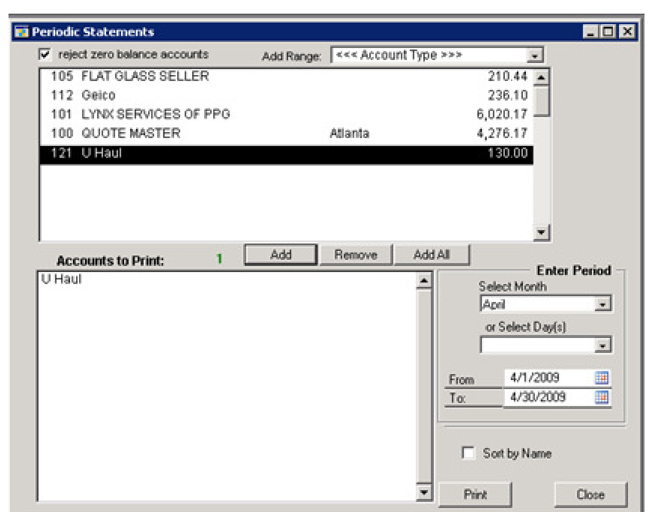
If you receive a check, credit card, or electronic payment from an account for multiple invoices you can pay them all quickly by going to Admin > Accounts Receivables > Apply Payments.

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.



Making Statements

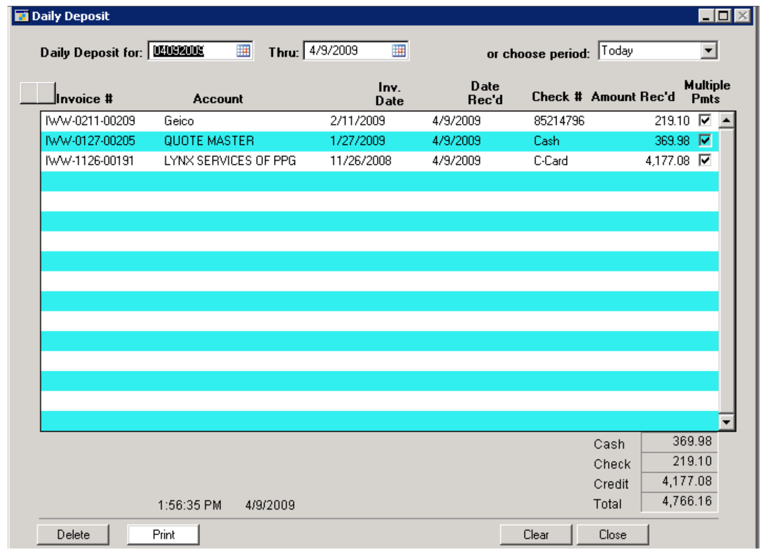
You can create monthly statements for any account in GlassShop that is set to print periodic statements. This option is located in the account setup screen in the upper right corner of the Account Setup window. After you have set your account to Print Periodic Statements you can create your Statements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



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.

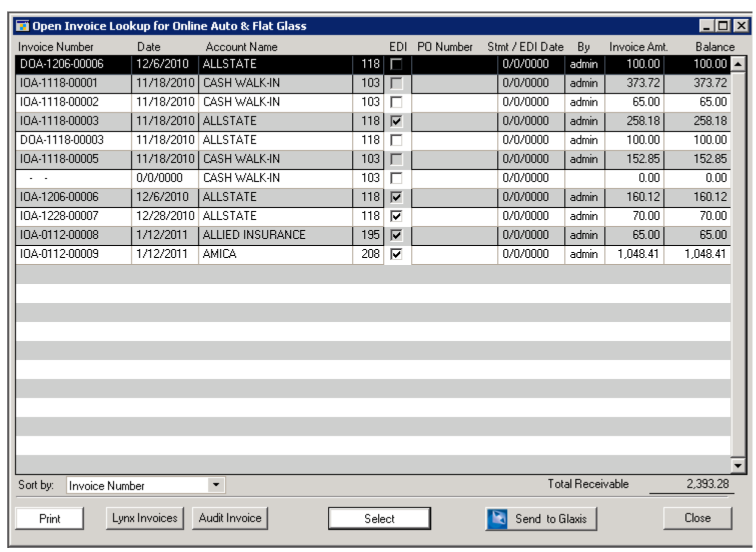
Daily Deposit Report

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.



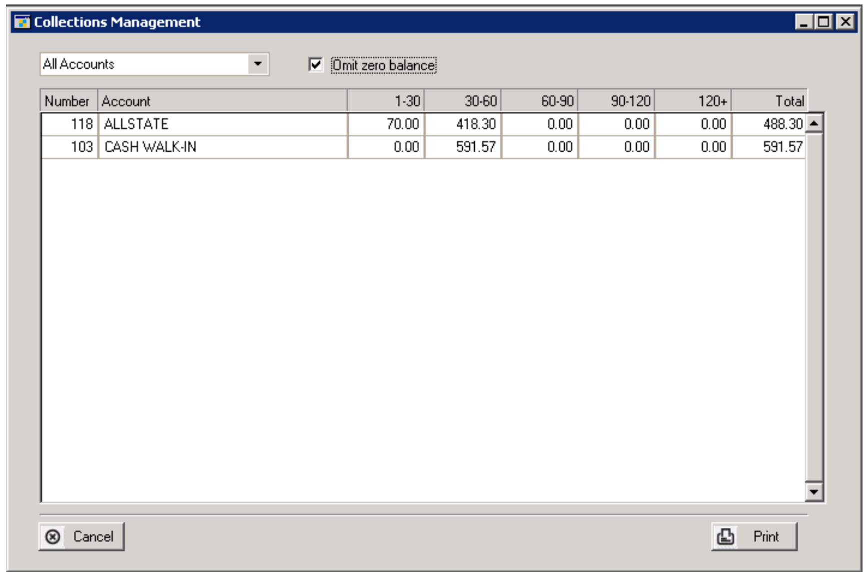
Unpaid Invoice Report

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.



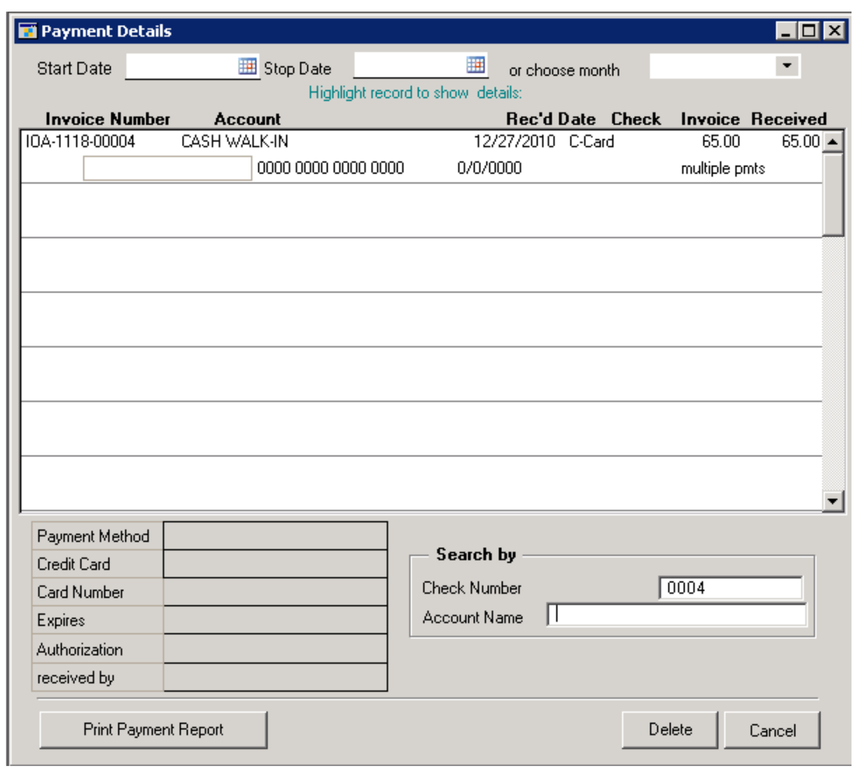
Collections Management

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



Searching Payments

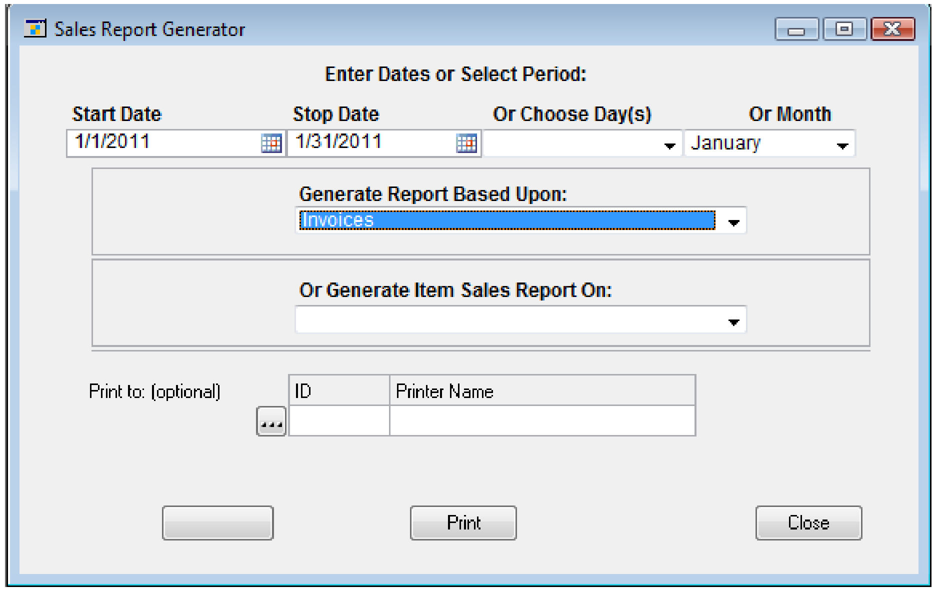
You can look up payments under Admin > Accounts Receivables > Search Payments.



Sales Report Generator

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

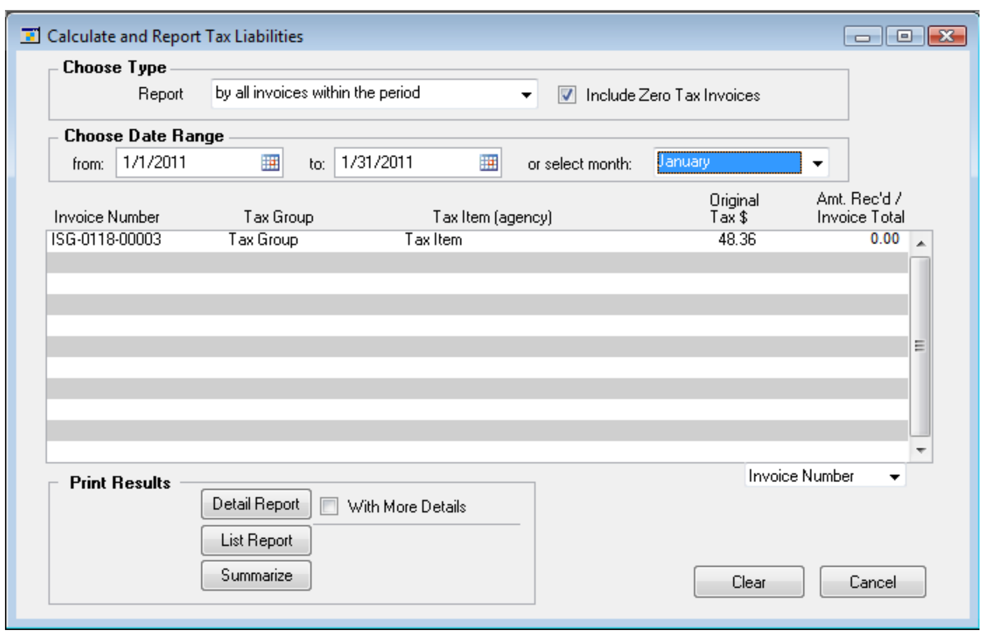
First choose the date range and then choose what to generate the report on.



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.

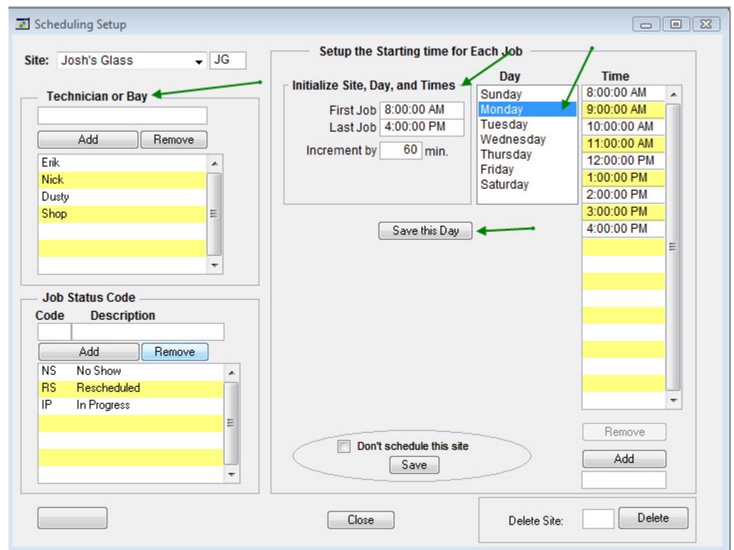


Setting up the Scheduler

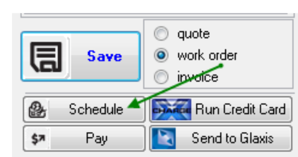
To setup the scheduler go to Admin > Scheduling > Setup Scheduler.

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.

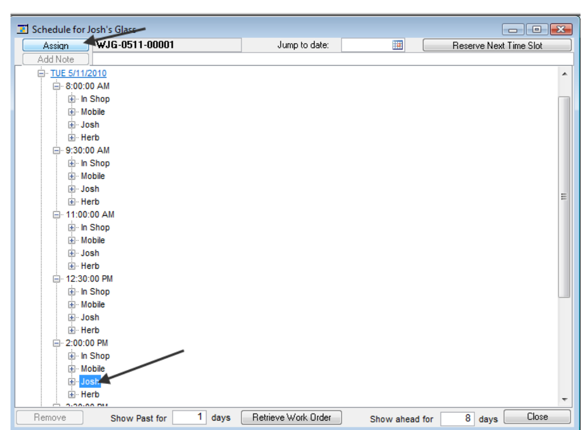
You will also need to enter in your techs or locations you will install the glass.



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.



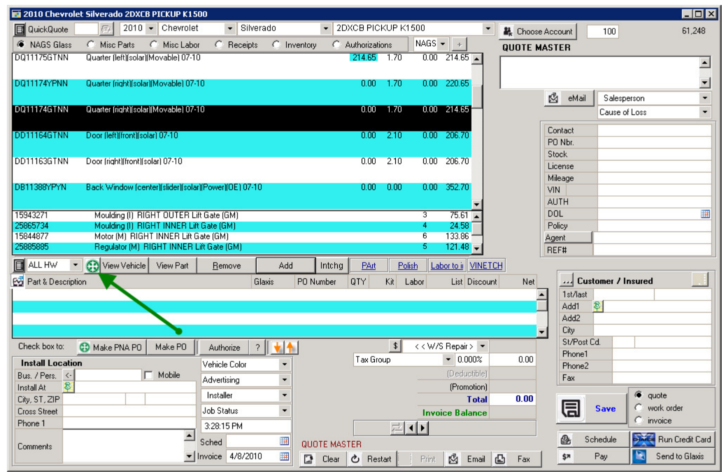
Then choose the date, time, and installer then click the assign button.



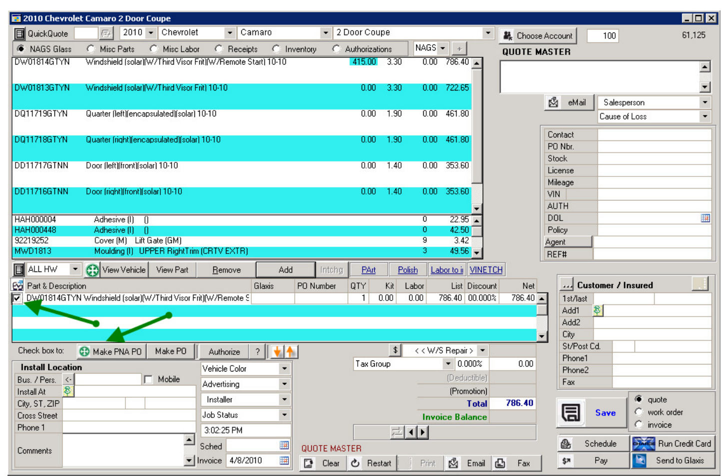
Pilkington Price Quoting and Ordering

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.

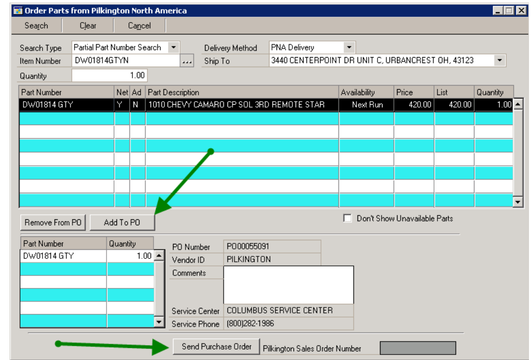
To get a quote from Pilkington for a part simply select a part and then click the Pilkington button.



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.



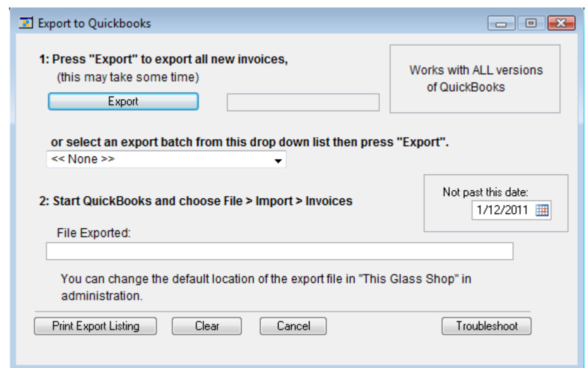
Then in the next window click add to PO and then click send PO you will then get a Pilkington sales order number to confirm the order.



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.

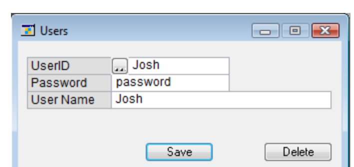
Then go to Admin > Export to Quickbooks and click Export. If you get an error about a tax group it is because all of your invoices do not have a tax group, if you aren't charging tax you still have to use the exempt group.



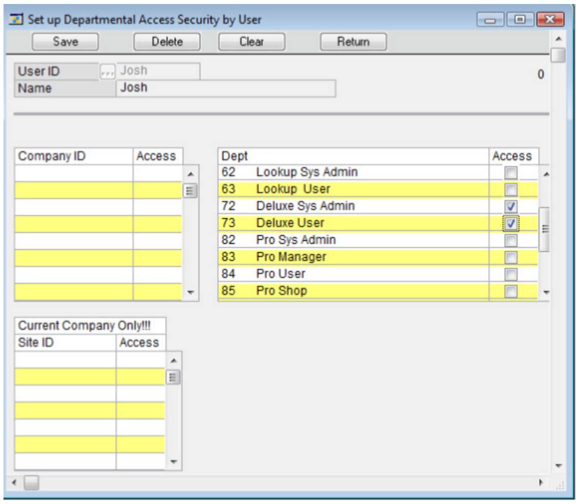
Then go into your Quick Books and go to File > Import > IIF file and then import the files generated in GlassShop.

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.



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.

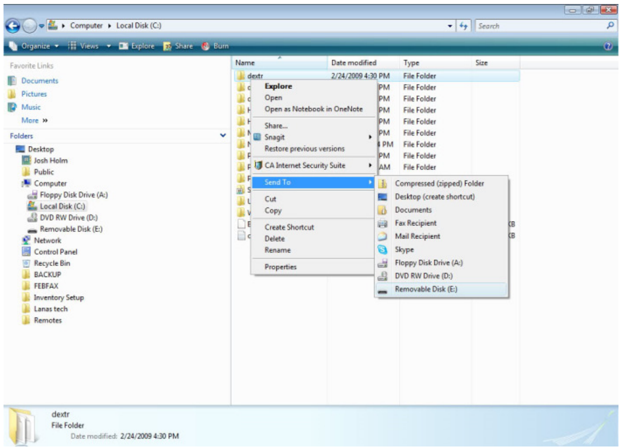


Backing up GlassShop is Easy

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.



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