

# GlassShop Manager Version 9.0

## Quick Start Manual

Everything you need to get going today!  
This does NOT replace your user manual.



March 2008  
Fargo, North Dakota  
1-888-488-8726

### Setting up this shop

You will need your Data Tranz codes sheet. If you do not have one, contact Data Tranz immediately or you will just rename the existing demo company, Specialized Glass LLC, instead of adjusting the system to send your EDI.

### Changing Shop Information

Go to Admin/ General Setup/ This Shop's Particulars

Change all left-hand column entries to match your shop

- Shop information: name, address, phone, etc. must exactly match the information on your Data Tranz codes sheet. Check: spacing, capitalization, punctuation and wording
- Site: change SG to two letters of your choice - Usually the first letters of shop name
- Tax Labor? / Tax WS Repair?: a checkmark in the box means tax is applied to these items
- Safelite ID: your Safelite Parent ID Number is 091473 and your Tax ID is 752777598

Save the information and close the window

### Sequence Numbers

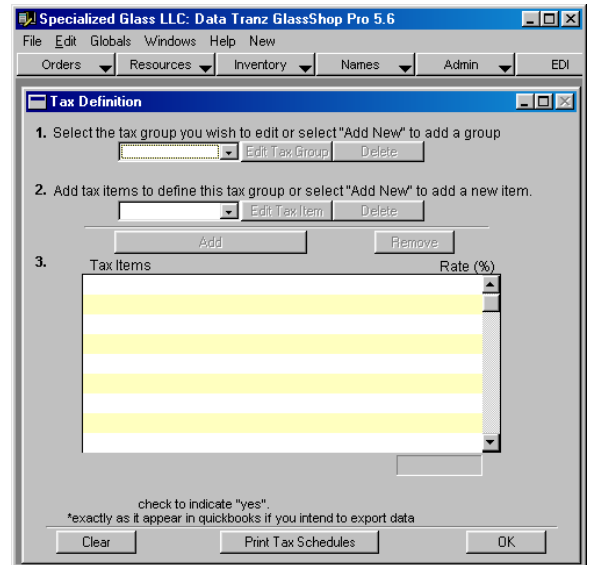
Go to Admin/ General Setup/ Sequence numbers  
 Change the starting numbers to numbers of your choice  
 Save changes and the window will close

### Tax Information

Go to Admin/ General Setup/ Tax Rates and Groups

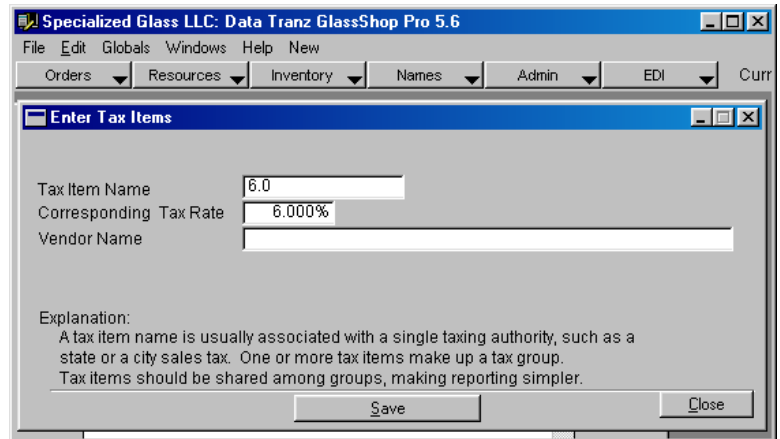
Set up a new tax group

1. Select 'Add New' from the first drop down window (number 1)
2. Name the group and save

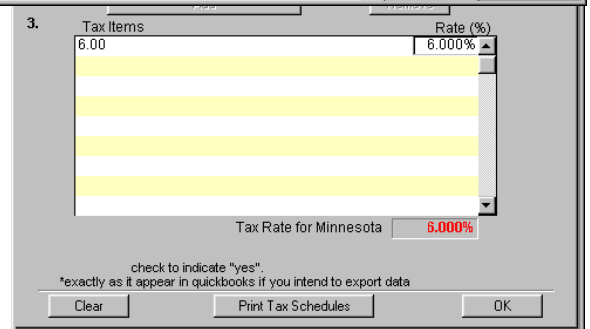


Set up a new tax item for your group

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
4. Leave Vender Name blank and Save



Click on the Add button to add the tax item to your tax group



If you have any other tax items to include in your group, create an additional tax item the same way and add it to your group.

Click OK

## **Account Setup**

You can have as many accounts as you want. We suggest that you edit the accounts that are already in the demo.

It is important to set up each account accurately so your EDI is linked to your glass shop.

Go to Names/ Accounts/ Account Setup

### ***Lynx account***

After you edit the existing Lynx account, you can use that one account for all of your Lynx invoices  
Click on the box with three dots beside Name  
Select 'LYNX SERVICES OF PPG'

Change the following information

- EDI Account number: this is the 'Lynx EDI Code' from your Data Tranz codes sheet (It will start with L)
- Tax ID Number: your tax number (not required)
- Tax Group: select the tax group you created earlier or leave 'none' if there is no tax
- Windshield Repairs: one should be the price charged for one chip repair, two is the total price charged for two, three is the total price for three (NOTE: you can edit these in your invoice later if needed)

Save your changes

### ***Safelite Accounts***

Safelite is somewhat different from Lynx in that you need a separate Safelite account for each insurance company sent to Safelite. Most Safelite Accounts are already setup.

For each insurance company complete the following steps:

## Go to Names/ Accounts/ Account Setup


- Name: Insurance Co name (please type carefully – you cannot edit the name later)
- Account Type drop down list: choose Insurance
- Invoice Requirements Checkboxes: check items you want required on each invoice - we recommend checking the following: claim/dispatch number, policy number, VIN number
- Windshield Repairs: one should be the price charged for one chip repair, two is the total price charged for two, three is the total price for three (NOTE: you can edit these in your invoice later if needed)
- Tax Group: select the tax group you created earlier or leave 'none' if there is no tax

**\*\*Make sure your EDI Account number matches your codes sheet or your EDI will not be connected to your glass shop**

Save your changes

## Making an invoice

When entering an insurance invoice, it is important to enter the information exactly as it appears on the authorization sheet Lynx or Safelite faxed to you.

1. Click on Orders / New Quote
2. Choose Account
  - click the  button
  - choose one of the accounts you have set up or choose QUOTE MASTER for any jobs not associated with an insurance company
3. Use the drop down menus to select the vehicle information
4. Type in the VIN number
5. For a Repair Invoice
  - Choose the number of repairs from the drop down list
  - If prices are incorrect, click the edit pricing option in the drop down menu.
6. Enter a deductible according to insurance information and any promotions you may have
7. Complete the following information on the right side:
  - AUTH: Lynx dispatch number or Safelite authorization number
  - DOL: month, day, year
  - Customer first and last name
  - Customer phone
8. If desired, enter your own reference number and any comments.

## 9. Choose invoice and save

### **Sending EDI**

From the main screen go to EDI/ Send invoices via EDI  
All your unsent invoices will appear in the window

Click Process Lynx Invoices and/or Process for Safelite

#### Transmission

If you have an email account that is setup on Outlook or Outlook Express and it is open and connected to the internet, you can click 'Internet Email' to send your invoices

Otherwise, you can use FTP to send invoices.

### **Getting Further Help**

Our web site has a wealth of information to help you. On the Support Home page you will be able to access a searchable database of support questions, manuals, downloadable support documents, program and data updates, and info on hot conflicts/issues such as choosing an internet provider. Visit us at [www.datatranz.com](http://www.datatranz.com)

We have a knowledgeable staff ready to help you. Call toll free Monday through Friday 9-5 CST. Otherwise email us and we will be happy to get back to you.

Call us at 1-888-488-8726

Email [support@datatranz.com](mailto:support@datatranz.com)