

# GlassShop Manager Version 9.42

## Quick Start Manual

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



March 2009  
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

Save the information and close the window

### Tax Information

Go to Admin/ General Setup/ Tax Rates and Groups

Set up a new tax group

Specialized Glass LLC: Data Tranz GlassShop Pro 5.6

File Edit Globals Windows Help New

Orders Resources Inventory Names Admin EDI

**Tax Definition**

1. Select the tax group you wish to edit or select "Add New" to add a group

2. Add tax items to define this tax group or select "Add New" to add a new item.

3. Tax Items Rate (%)

Tax Items	Rate (%)

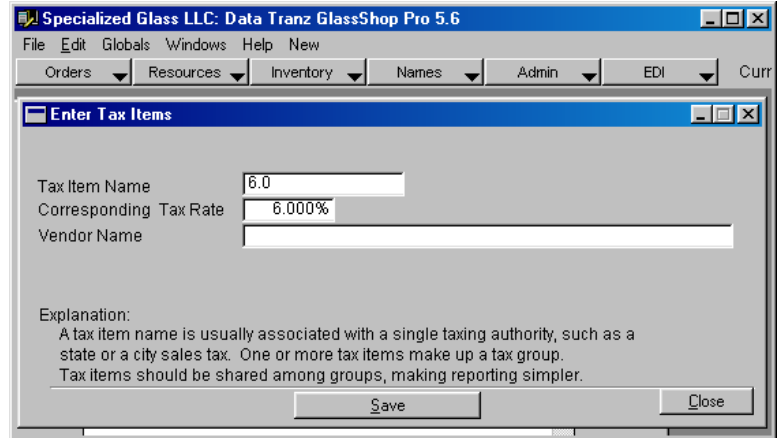
check to indicate "yes"  
\*exactly as it appear in quickbooks if you intend to export data

Clear Print Tax Schedules OK

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

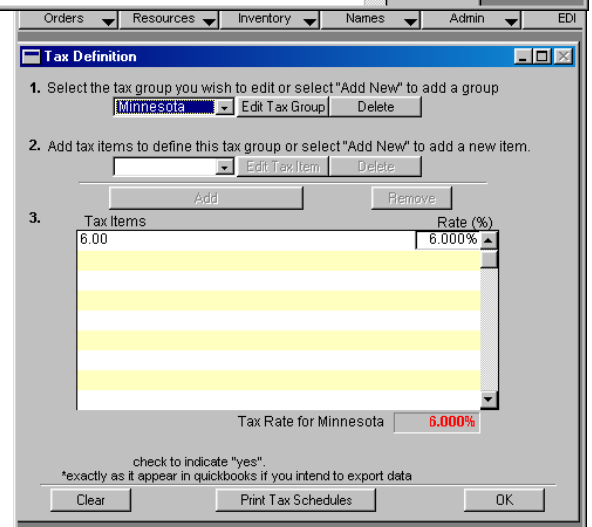
1. Select 'Add New' from the second drop down window (number 2)
2. Name the item with the corresponding tax rate
3. Enter in the corresponding tax rate
4. Leave Vender Name blank and Save



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 Safelite EDI**

From the main screen go to EDI/ Send invoices via EDI

All your unsent invoices will appear in the window

Click Process 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.

## **Glaxis Invoicing**

The first step to invoicing 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.

**TESTING**

Outbound	...	C:\dextr\Outbound\
Inbound	...	C:\dextr\Inbound\
Archive	...	C:\dextr\Archive\
DTCComm.exe	...	C:\dextr\DTCComm\DTCComm.exe

UserName or Parent PID	123456
Password	D12GTYH
Origination PID	5783
Network Address	DATR5783

Default Account	...	101 LYNX SERVICES OF PPG
Path to bundle.bat	...	C:\dextr\

Buttons: Cancel, Save, Options

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.

1 Chip Repair	50.00
Tax Group 6.500%	0.00
<b>Total</b>	<b>50.00</b>

Invoice Balance: 50.00

Account: IHQ-1229-00003

Phone1: (270)744-8485  
 Phone2: (000)000-0000  
 Fax: (000)000-0000

Buttons: Save, Schedule, Run Credit Card, Pay, Send to Glaxis

Radio buttons: quote, work order, **invoice**

Footer: LYNX SERVICES OF PPG

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.

The screenshot shows a window titled "Manage Glaxis Invoice Acknowledgements". At the top, there is a search bar labeled "Search by Dispatch", a "Sort By" dropdown menu set to "Date", and a "Refresh" button. Below this is a table with the following columns: Dispatch, Invoice, Date, Time, Total, and Result. The table contains 13 rows of data, with alternating rows highlighted in yellow. Two rows show "Invoice Rejected" status with blue hyperlinks for "click here for rejected part details".

Dispatch	Invoice	Date	Time	Total	Result
333238117	29654	3/13/2009	9:24:00 AM	70.78	Invoice Accepted
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
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 <a href="#">click here for rejected part details</a>
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	243.08	Invoice Rejected <a href="#">Retailer VIN does not match VIN on Policy Record; click here for rejected part details</a>
333388003	20965	3/13/2009	9:24:00 AM	200.67	Invoice Accepted
333405137	27687	3/13/2009	9:24:00 AM	59.00	Invoice Accepted

## Paying Invoices

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.

**Payment**

Document#	Customer	Invoiced By	
IWWW-0717-00157	CASH WALK-IN	ADMIN	7/17/2008

Customer Zip: 581040000

Pay Method:

invoice amt.	310.50
invoice balance	310.50
TENDERED	\$0.00
CHANGE	\$0.00

**CHARGE**

**Add**


Cancel   Details   Save

After selecting your payment type you will need to enter in the amount paid in the Tendered field. After you have entered in the amount tendered click the Add button and then save your payment.

# 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.

**Account Setup**

Dealer: 117

**Name**: Fowler Dodge

**Address**: 345 2nd

**City/State/Zip**:

**Primary Phone**: (000)000-0000

**Secondary Phone**: (000)000-0000

**Phone Fax**: (000)000-0000

**Contact Person**:

**Tax Information**

Resale number:

Tax ID number: 00-0000000

Tax Group (save account first): << None >>

**Pop-Up Comments**

Display when account activated on order.

**Billing**

Print Periodic Statement  Agent is 'Bill To:'

Lynx  Safelite  Not EDI

Safelite Program ID:

**Invoice Requirements**

Purchase Order  VIN No.

Stock  License No.

Agent Name  Mileage

Date of Loss or Referral  Cause of Loss

Claim / Dispatch Number  Policy Number

**Windshield Repairs**

One	0.00
Two	0.00
Three	0.00
Four	0.00
Long Crack	0.00

**Retail Discounts**

Items	0.0%
Labor	0.0%

**Ship to (from Cust. List)**: 0

**Salesperson**:

**LOCK ACCOUNT**  
(prevents saving invoices and work orders)

Buttons: Delete, Sales History, Account History, Save, Save and New, Discounts and Rates, Close

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 >>>

104	CASH WALK-IN	310.50
117	Fowler Dodge	867.80

**Accounts to Print:**      1      Add      Remove      Add All

Fowler Dodge

**Enter Period**

Select Month: [ ]  
or Select Day(s): [ ]

From: 4/18/2008 [ ]  
To: 7/17/2008 [ ]

Sort by Name

Print      Close

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.

# The Daily Deposit Report

Daily Deposit for: 07172008 Thru: 7/17/2008 or choose period: Today

Invoice #	Account	Inv. Date	Date Rec'd	Check #	Amount Rec'd	Multiple Pmts
ISG-1216-00008	CASH WALK-IN	12/16/2004	7/17/2008	00745	1.19	<input type="checkbox"/>
ISG-1216-00011	CASH WALK-IN	12/16/2004	7/17/2008	00745	178.92	<input type="checkbox"/>
ISG-0118-00018	CASH WALK-IN	1/18/2005	7/17/2008	00745	3.00	<input type="checkbox"/>
ISG-0119-00020	CASH WALK-IN	1/19/2005	7/17/2008	00745	219.00	<input type="checkbox"/>
ISG-0119-00021	CASH WALK-IN	1/19/2005	7/17/2008	00745	180.32	<input type="checkbox"/>
ISG-0325-00033	CASH WALK-IN	3/25/2005	7/17/2008	00745	1,310.00	<input type="checkbox"/>
ISG-0325-00032	CASH WALK-IN	3/25/2005	7/17/2008	00745	0.00	<input type="checkbox"/>
ISG-0419-00040	CASH WALK-IN	4/19/2005	7/17/2008	00745	416.30	<input type="checkbox"/>
ISG-1110-00107	CASH WALK-IN	11/10/2005	7/17/2008	00745	26.88	<input type="checkbox"/>
ISG-1004-00080	CASH WALK-IN	10/4/2005	7/17/2008	00745	664.38	<input checked="" type="checkbox"/>
IWW-0717-00156	QUOTE MASTER	7/17/2008	7/17/2008	Cash	586.60	<input checked="" type="checkbox"/>

Cash	586.60
Check	3,000.00
Credit	0.00
<b>Total</b>	<b>3,586.60</b>

2:51:01 PM 7/17/2008

Buttons: Delete, Print, Clear, Close

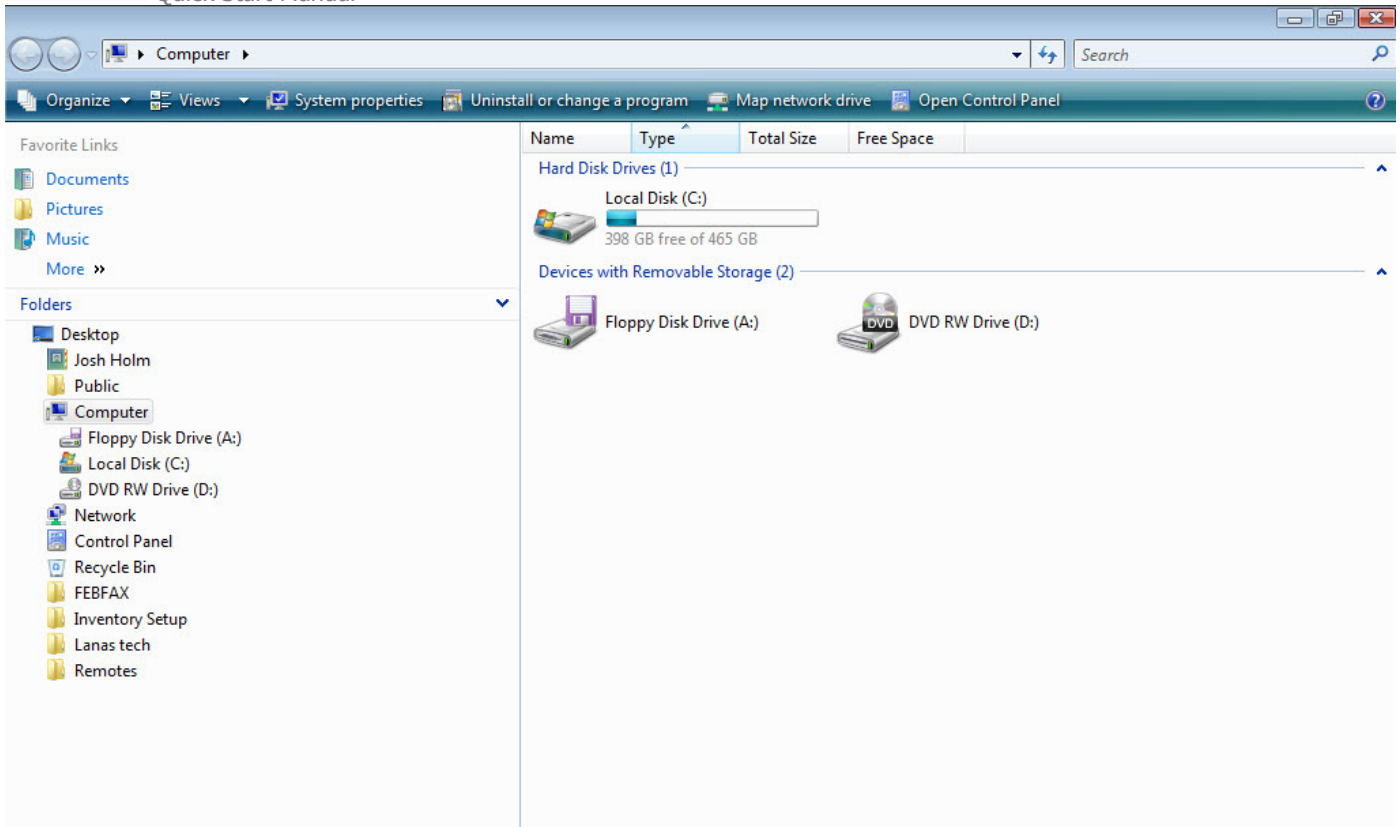
Now that you can pay invoice you will want to generate a report at the end of the day to help keep track of the amount of money you took in a day. You can now print that a report that will show the total amount you received in a day and it will break it down for you by payment type. The Daily Deposit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

## Backing up GlassShop

You should backup your GlassShop System weekly.

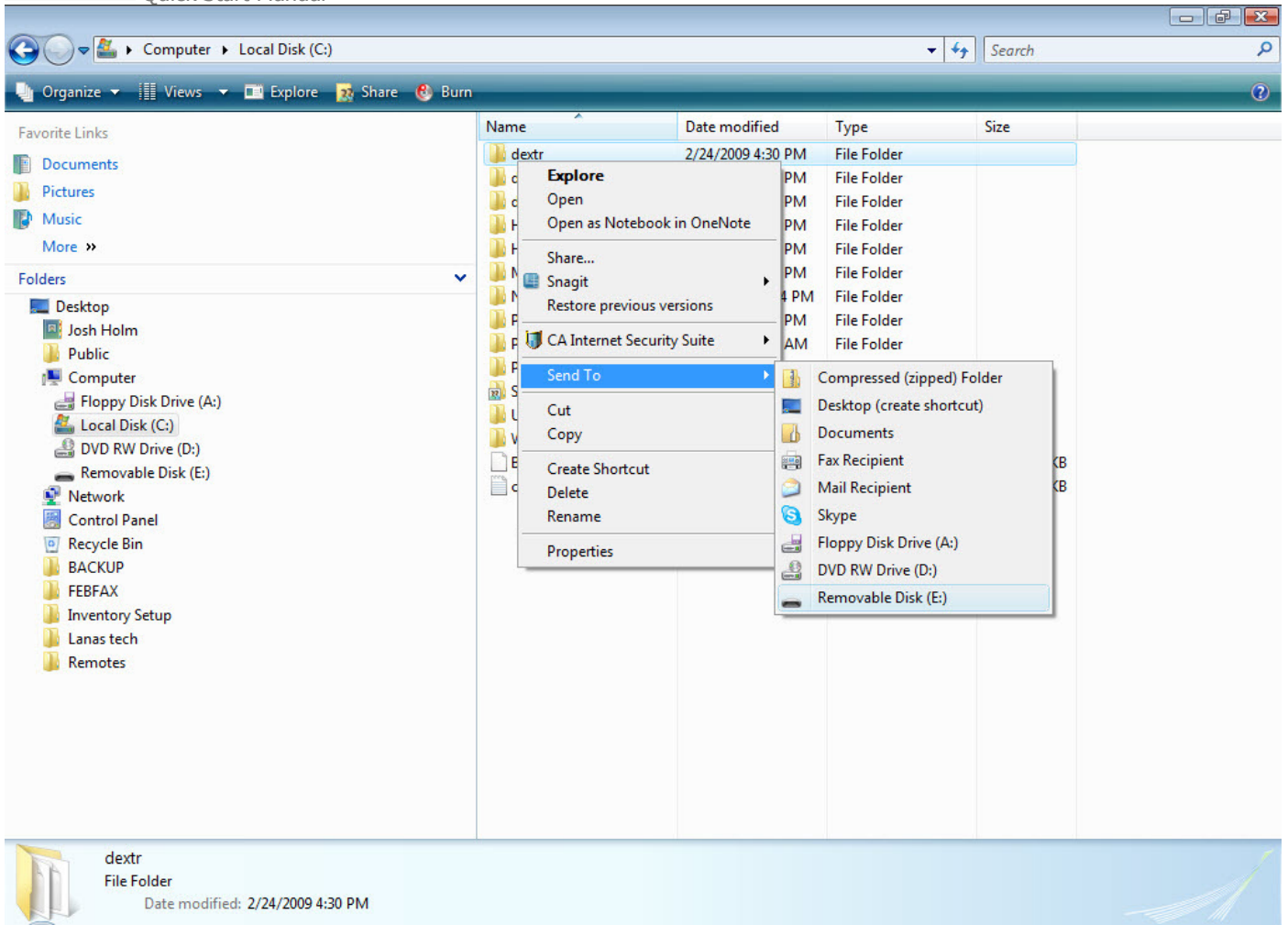
The best way to do this with a USB Flash Drive that is 1 GB or larger. Having a flash drives allows you to overwrite the old backups. We believe that using a flash drive will be more dependable than using a CD or DVD.

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.



## 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 1-800-214-1493

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