

GlassShop Manager Manual



1-800-241-1493

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.

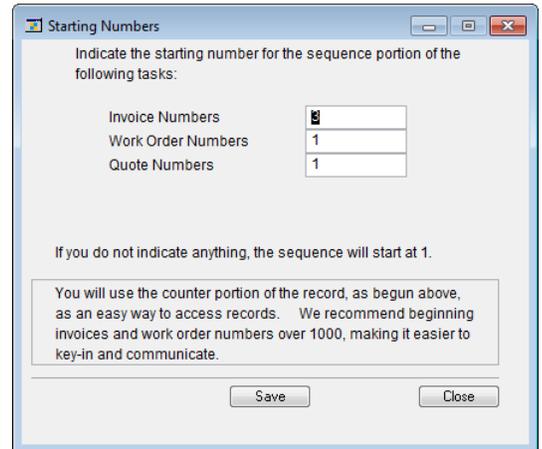
Save the information and close the window

Site		Open Data Entry Window When Starting	<input checked="" type="checkbox"/>
Site Name	Specialized Vehicle Services		3,755
Owner			3,749
Address1	345 2nd Avenue NE		
Address2			
City, St, Zip	Valley City ND 58072-0000		
Phone	(888)488-8726		
Phone2	(800)241-1493		
Fax	(800)316-5829		
Tax ID	98-7654321		
Tax Labor?	<input checked="" type="checkbox"/>		
Tax WS Repr?	<input type="checkbox"/>		
EDI Contact	HERBIE		
Safelite Parent or Vendor ID	SAFELITEID		
Master EDI Account (from Data Tranz)	LTEST99		
Default Quoting Customer	100 QUOTE MASTER		
Email Address	INFO@SPECIALIZEDVEHICLE.COM		
Website	WWW.SPECIALIZEDVEHICLE.COM		
Shop Slogan	ALL THE SERVICES YOU NEED		
QuickBooks Output Path			
EDI Output Path	C:\dextr\send/		

Accounts Save Close

Sequence Numbers

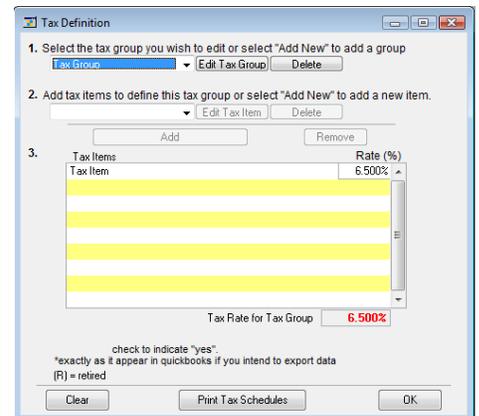
Go to Admin/ General Setup/ Sequence numbers
 Change the starting numbers to numbers of your choice
 Save changes and the window will close



Tax Setup

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

On 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

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 / Rapid Invoice Entry
2. Choose Account
 - click the  button
 - choose one of the accounts
3. Use the drop down menus to select the vehicle information
4. Type in the VIN number
1. For a Repair Invoice
 - Choose the number of repairs from the drop down list
6. Complete the following information on the right side:
 - AUTH: Lynx dispatch number or Safelite authorizaition number
 - DOL: month, day, year
 - Customer first and last name
 - Customer phone
7. Choose invoice and save

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.

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
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
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

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 for Safelite

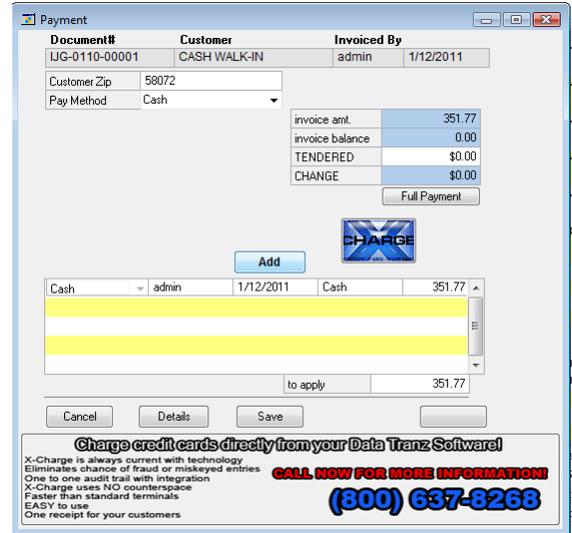
Transmission

If you have an email account 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.

Paying an Invoice

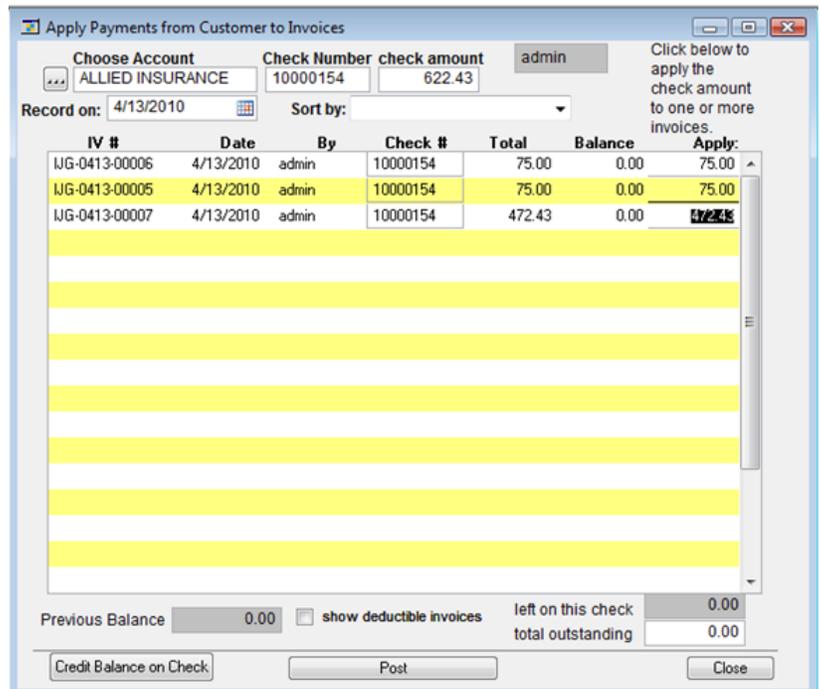
Glass Shop will allow you to pay an invoice using cash, check, or credit card. All orders must be saved as an invoice before you can make a payment. You can keep track of unpaid invoices by using the Unpaid Invoices feature under the Orders Menu. The pay button is located on the order entry screen directly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



Paying Multiple Invoices from One Payment

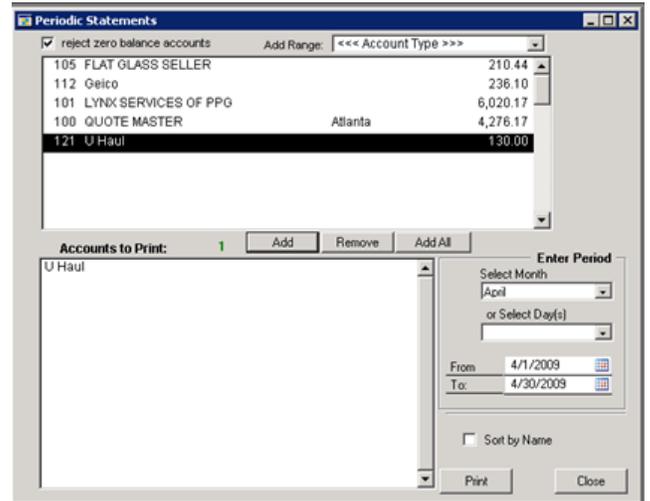
If you receive a check, credit card, or electronic payment from an account for multiple invoices you can pay them all quickly by going to Admin > Accounts Receivables > Apply Payments.

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.

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.

Invoice Number	Date	Account Name	EDI	PO Number	Stmt / EDI Date	By	Invoice Amt	Balance
DOA-1206-00006	12/6/2010	ALLSTATE	118		0/0/0000	admin	100.00	100.00
IOA-1118-00001	11/18/2010	CASH WALK-IN	103		0/0/0000	admin	373.72	373.72
IOA-1118-00002	11/18/2010	CASH WALK-IN	103		0/0/0000	admin	65.00	65.00
IOA-1118-00003	11/18/2010	ALLSTATE	118		0/0/0000	admin	258.18	258.18
DOA-1118-00003	11/18/2010	ALLSTATE	118		0/0/0000	admin	100.00	100.00
IOA-1118-00005	11/18/2010	CASH WALK-IN	103		0/0/0000	admin	152.85	152.85
-	0/0/0000	CASH WALK-IN	103		0/0/0000		0.00	0.00
IOA-1206-00006	12/6/2010	ALLSTATE	118		0/0/0000	admin	160.12	160.12
IOA-1228-00007	12/28/2010	ALLSTATE	118		0/0/0000	admin	70.00	70.00
IOA-0112-00008	1/12/2011	ALLIED INSURANCE	195		0/0/0000	admin	65.00	65.00
IOA-0112-00009	1/12/2011	AMICA	208		0/0/0000	admin	1,048.41	1,048.41

Sort by: Invoice Number Total Receivable 2,393.28

Buttons: Print, Lynx Invoices, Audit Invoice, Select, Send to Glass, Close

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

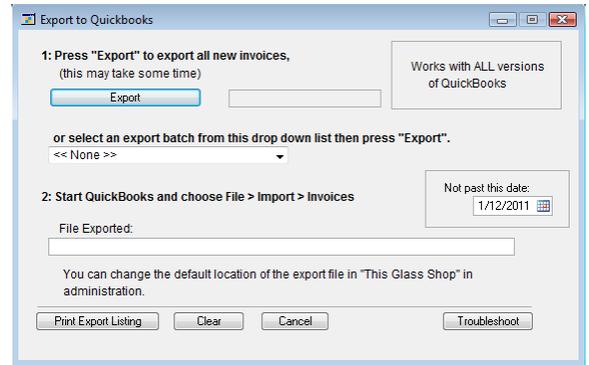
Choose the type of invoices you want to generate the report based on, then the date range, and then report type.

Invoice Number	Tax Group	Tax Item (agency)	Original Tax \$	Amt. Rec'd / Invoice Total
ISG-0118-00003	Tax Group	Tax Item	48.36	0.00

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.



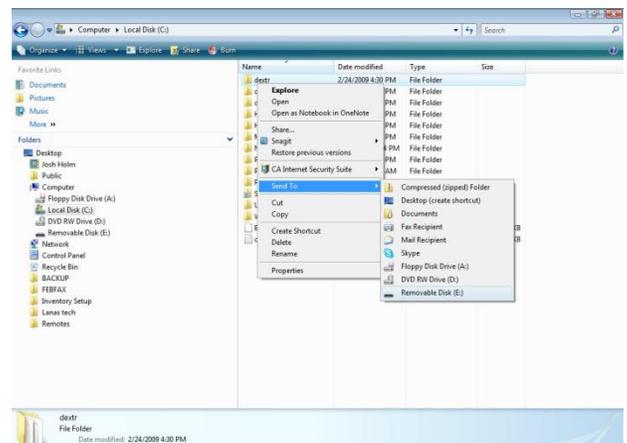
Then go into your Quick Books and go to File > Import > IIF file and then import the files generated in GlassShop.

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 or 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>

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 <http://managersupport.datatranz.us/>

The GlassShop Systems User Manual includes in depth information about the various program components. It is a valuable resource when using the system.

We have a knowledgeable staff ready to help you. Call toll free Monday through Friday 8-5 CST. Otherwise email us and we will be happy to get back to you.

Call us at 1-800-241-1493

Email support@datatranz.com