

GlassShop Systems Version 11

Manual



support@datatranz.com

1-800-241-1493

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 ahead and fill out the information on this page:

Company Name	Josh' Glass		
Owner	JOSH		
Address1	345 2nd St NE		
Address2			
City, St, Zip	Valley City	ND	58072
Phone	(800)241-1493		
Phone2	(000)000-0000		
Fax	(800)316-5829		
Tax Labor?	<input type="checkbox"/>		
Tax WS Repr?	<input type="checkbox"/>		
Email Address	sales@datatranz.com		
Website			
Shop Slogan			

Access Codes

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

Access Codes

Josh' Glass

Valley City
ND 58072
(800)241-1493
(000)000-0000
(800)316-5829

Saving For:
JG

Inventory OFF

S-872567-H
N-023551-Q
A-048095-R

Please enter codes as instructed by Data Tranz

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

The 'Tax Definition' window is used to create or edit a tax group. It contains the following elements:

- Step 1:** A dropdown menu labeled 'Tax Group' with a blue highlight, and buttons for 'Edit Tax Group' and 'Delete'.
- Step 2:** A dropdown menu for adding tax items, with buttons for 'Edit Tax Item' and 'Delete'.
- Step 3:** A table with two columns: 'Tax Items' and 'Rate (%)'. The first row shows 'Tax Item' and '6.500%'. Below the table are 'Add' and 'Remove' buttons.
- Summary:** A label 'Tax Rate for Tax Group' followed by a red box containing '6.500%'. Below this is a note: 'check to indicate "yes". *exactly as it appear in quickbooks if you intend to export data (R) = retired'.
- Buttons:** 'Clear', 'Print Tax Schedules', and 'OK' at the bottom.

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

The 'Enter Tax Items' window is used to define a specific tax item. It contains the following elements:

- Fields:** 'Tax Item Name' (Sales Tax), 'Corresponding Tax Rate' (6.500%), and 'Vendor Name' (State Tax Commissioner).
- Explanation:** A text block stating: 'A tax item name is usually associated with a single taxing authority, such as a state or a city sales tax. One or more tax items make up a tax group. Tax items should be shared among groups, making reporting simpler.'
- Buttons:** 'Save' and 'Close' at the bottom.

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

Account Setup

Name: Insurance Lynx Number: 118

Address: ... ALLSTATE

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: TAX GROUP

Pop-Up Comments: ...

Display when account activated on order: ☐

Invoice

Invoice Comment: ...

Ship to (from Cust. List): 0

Salesperson: ...

LOCK ACCOUNT (prevents saving invoices and work orders)

Billing

Print Periodic Statement: ☐ Agent is 'Bill To': ☐

Lynx: ☒ Safelite: ☐ Not EDI: ☐

Insurance ID: ...

EDI Account: LTEST99

Invoice Requirements

Purchase Order: ☐ Stock: ☐ Agent Name: ☐ Date of Loss or Referral: ☐ Claim / Dispatch Number: ☒ VIN No.: ☒ License No.: ☐ Mileage: ☐ Cause of Loss: ☐ Policy Number: ☐

Windshield Repairs

One: 50.00

Two: 60.00

Three: 70.00

Four: 0.00

Long Crack: 0.00

Retail Discounts

Items: 0.0%

Labor: 0.0%

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.

Account Discounts and Rates

Domestic Foreign

regular heated 100% disc regular heated 100% disc

Laminated 15.0000 15.0000 15.0000 15.0000 15.0000 15.0000

Tempered 15.0000 15.0000 15.0000 15.0000 15.0000 15.0000

Kits 15.0000 15.0000 15.0000 15.0000 15.0000 15.0000

HW / MLDG 15.0000 15.0000 15.0000 15.0000 15.0000 15.0000

Labor (shop) 15.0000 15.0000 15.0000 15.0000 15.0000 15.0000

Labor (mobile) 15.0000 15.0000 15.0000 15.0000 15.0000 15.0000

Set Labor Flat Rates: Domestic Foreign

shop mobile shop mobile

WS 100.00 100.00 100.00 100.00

Door 100.00 100.00 100.00 100.00

Back 100.00 100.00 100.00 100.00

Qtr. 100.00 100.00 100.00 100.00

Partition 100.00 100.00 100.00 100.00

Roof 100.00 100.00 100.00 100.00

Side 100.00 100.00 100.00 100.00

Slider 100.00 100.00 100.00 100.00

Vent 100.00 100.00 100.00 100.00

Kits Prices

Amt. Regular High Modulus Non Conductive Fast Cure

1 20.00 20.00 20.00 20.00 20.00

1.5 20.00 20.00 20.00 20.00 20.00

2 20.00 20.00 20.00 20.00 20.00

2.5 20.00 20.00 20.00 20.00 20.00

3 20.00 20.00 20.00 20.00 20.00

Set All Flat to: ...

Clear Flat Rates

Some accounts may require:

Use flat rate for first / (Dom. / For.) hours, then use hourly rate.

or...

Use flat rate + hourly

Copy in pricing from this account: ALLSTATE 118

Save Close

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

Part #	Description	Glass	PO Number	QTY	Kit	Labor	List	Discount	Net
DW01551GTNN	Windshield (solar)(w/Third Visor Fit)(Aftermarket) 04-08			1	20.00	100.00	216.40	00.000%	216.40
DW01551GTNN	Windshield (solar)(w/Third Visor Fit)(Aftermarket) 04-08			1	20.00	100.00	216.40	00.000%	216.40
DW01551GBYN	Windshield (solar)(w/Third Visor Fit)(Aftermarket) 04-08			1	20.00	100.00	216.40	00.000%	216.40
DW01551GBNN	Windshield (solar)(w/Third Visor Fit)(Aftermarket) 04-08			1	20.00	100.00	216.40	00.000%	216.40
DW01548GTNN	Windshield (solar)(w/Third Visor Fit) 04-08			1	20.00	100.00	216.40	00.000%	216.40
DW01548GTNN	Windshield (solar)(w/Third Visor Fit) 04-08			1	20.00	100.00	216.40	00.000%	216.40

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 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.

Manage Glaxis Invoice Acknowledgements						
Search by Dispatch		Sort By Date		Refresh		
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 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 choose 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. Simply 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 then click yes to the message asking if you are connected to the internet.

Account	Invoice Number	Auth / Dispatch	Balance	Send
SAFELITE	IJG-0413-00005	123456	75.00	<input checked="" type="checkbox"/>

1. Create output file(s):

2. Send file(s): (requires active Internet connection)
via one of these methods: (requires MAPI enabled email)

Or, you can manually send the above files via other email programs (not recommended).

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# IJG-0110-00001 Customer CASH WALK-IN Invoiced By admin 1/12/2011

Customer Zip 58072 Pay Method Cash

invoice amt.	351.77
invoice balance	0.00
TENDERED	\$0.00
CHANGE	\$0.00

Cash	admin	1/12/2011	Cash	351.77

to apply 351.77

Charge credit cards directly from your Data Tranz Software!

X-Charge is always current with technology
Eliminates chance of fraud or miskeyed entries
One to one audit trail with integration
X-Charge uses NO counterspace
Faster than standard terminals
EASY to use
One receipt for your customers

CALL NOW FOR MORE INFORMATION!
(800) 637-8268

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.

Apply Payments from Customer to Invoices

Choose Account: ALLIED INSURANCE Check Number: 10000154 check amount: 622.43 admin

Record on: 4/13/2010 Sort by:

IV #	Date	By	Check #	Total	Balance	Apply:
IJG-0413-00006	4/13/2010	admin	10000154	75.00	0.00	75.00
IJG-0413-00005	4/13/2010	admin	10000154	75.00	0.00	75.00
IJG-0413-00007	4/13/2010	admin	10000154	472.43	0.00	472.43

Previous Balance: 0.00 show deductible invoices left on this check: 0.00 total outstanding: 0.00

Credit Balance on Check Post Close

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.

Periodic Statements

☒ reject zero balance accounts Add Range: <<< Account Type >>>

Account #	Account Name	Balance
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 All

U Haul

Enter Period

Select Month: April

or Select Day(s):

From: 4/1/2009 To: 4/30/2009

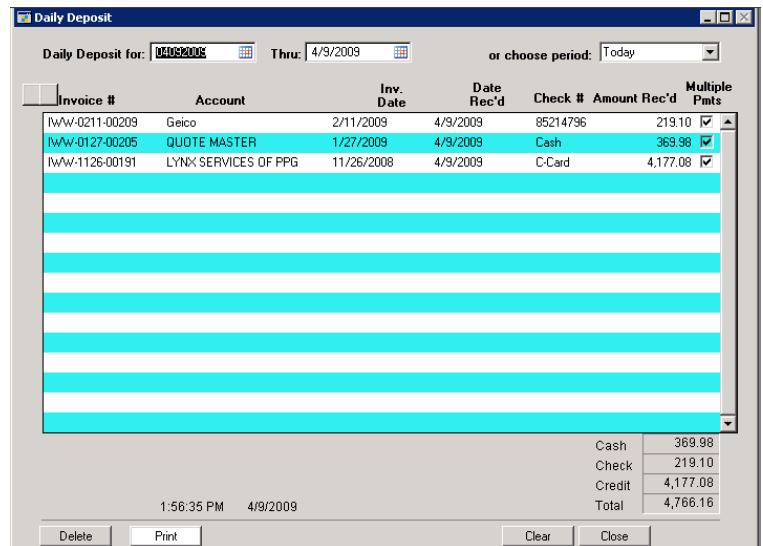
☐ Sort by Name

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.

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.



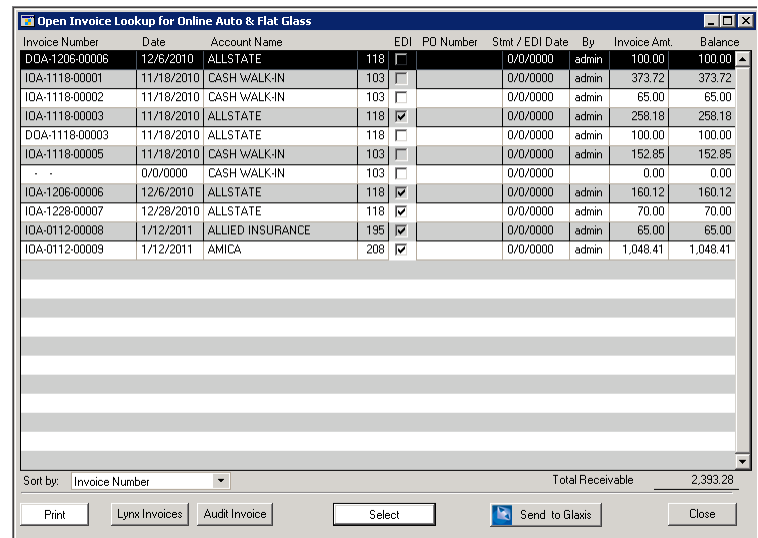
The screenshot shows the 'Daily Deposit' window. At the top, it says 'Daily Deposit for: 4/9/2009' and 'Thru: 4/9/2009'. Below this is a table with columns: Invoice #, Account, Inv. Date, Date Rec'd, Check #, Amount Rec'd, and Multiple Pmts. The table contains three rows of data, all highlighted in blue. The first row is for invoice IWW-0211-00209 from Geico, dated 2/11/2009, received 4/9/2009, for \$219.10 via check #85214796. The second row is for invoice IWW-0127-00205 from QUOTE MASTER, dated 1/27/2009, received 4/9/2009, for \$369.98 via cash. The third row is for invoice IWW-1126-00191 from LYNX SERVICES OF PPG, dated 11/26/2008, received 4/9/2009, for \$4,177.08 via C-Card. At the bottom right, a summary table shows: Cash 369.98, Check 219.10, Credit 4,177.08, and Total 4,766.16. The window also has 'Delete', 'Print', 'Clear', and 'Close' buttons.

Invoice #	Account	Inv. Date	Date Rec'd	Check #	Amount Rec'd	Multiple Pmts
IWW-0211-00209	Geico	2/11/2009	4/9/2009	85214796	219.10	<input checked="" type="checkbox"/>
IWW-0127-00205	QUOTE MASTER	1/27/2009	4/9/2009	Cash	369.98	<input checked="" type="checkbox"/>
IWW-1126-00191	LYNX SERVICES OF PPG	11/26/2008	4/9/2009	C-Card	4,177.08	<input checked="" type="checkbox"/>

Cash	369.98
Check	219.10
Credit	4,177.08
Total	4,766.16

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.



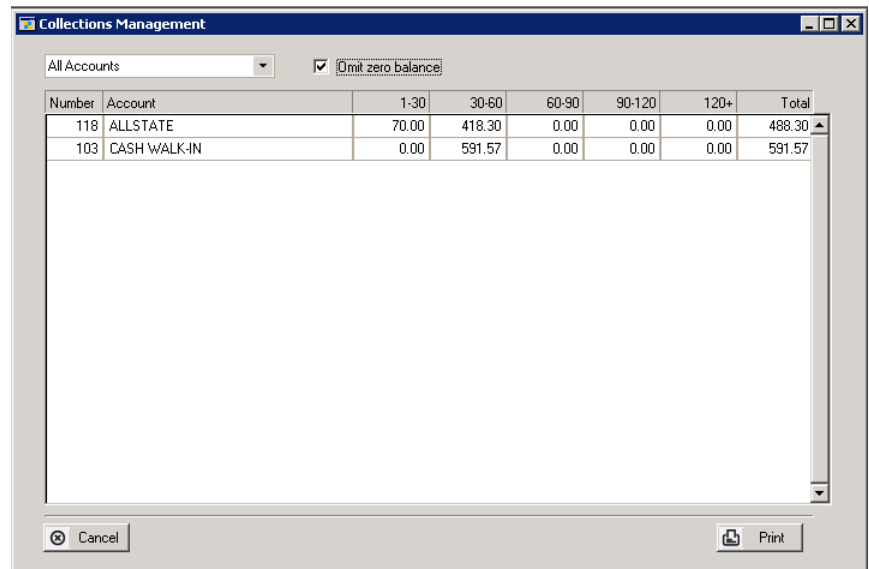
The screenshot shows the 'Open Invoice Lookup for Online Auto & Flat Glass' window. It contains a table with columns: Invoice Number, Date, Account Name, EDI, PO Number, Stmt / EDI Date, By, Invoice Amt., and Balance. The table lists several invoices, some of which are highlighted in blue. The first row is for invoice DOA-1206-00006 from ALLSTATE, dated 12/6/2010, with a balance of 100.00. The second row is for invoice IOA-1118-00001 from CASH WALK-IN, dated 11/18/2010, with a balance of 373.72. The third row is for invoice IOA-1118-00002 from CASH WALK-IN, dated 11/18/2010, with a balance of 65.00. The fourth row is for invoice IOA-1118-00003 from ALLSTATE, dated 11/18/2010, with a balance of 258.18. The fifth row is for invoice DOA-1118-00003 from ALLSTATE, dated 11/18/2010, with a balance of 100.00. The sixth row is for invoice IOA-1118-00005 from CASH WALK-IN, dated 11/18/2010, with a balance of 152.85. The seventh row is for invoice IOA-1206-00006 from ALLSTATE, dated 12/6/2010, with a balance of 160.12. The eighth row is for invoice IOA-1228-00007 from ALLSTATE, dated 12/28/2010, with a balance of 70.00. The ninth row is for invoice IOA-0112-00008 from ALLIED INSURANCE, dated 1/12/2011, with a balance of 65.00. The tenth row is for invoice IOA-0112-00009 from AMICA, dated 1/12/2011, with a balance of 1,048.41. At the bottom right, a summary table shows: Total Receivable 2,393.28. The window also has 'Print', 'Lynx Invoices', 'Audit Invoice', 'Select', 'Send to Glass', and 'Close' buttons.

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
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

Total Receivable	2,393.28
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Collections Management

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



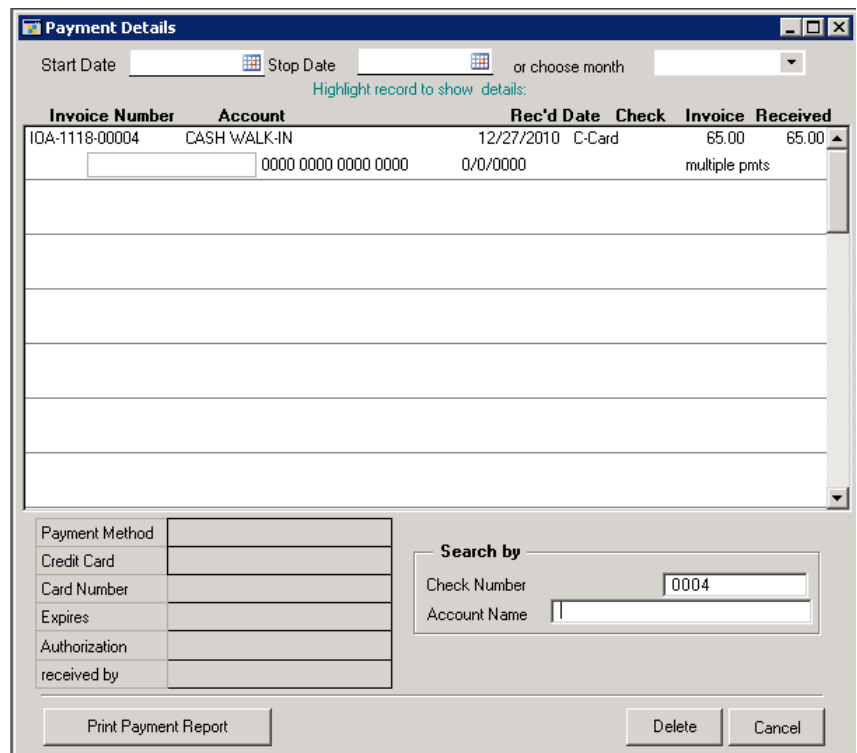
The screenshot shows the 'Collections Management' window. At the top, there is a dropdown menu set to 'All Accounts' and a checked checkbox labeled 'Limit zero balance'. Below this is a table with the following data:

Number	Account	1-30	30-60	60-90	90-120	120+	Total
118	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

At the bottom of the window, there are 'Cancel' and 'Print' buttons.

Searching Payments

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



The screenshot shows the 'Payment Details' window. At the top, there are fields for 'Start Date' and 'Stop Date', with a note 'or choose month' and a dropdown arrow. Below this is a link that says 'Highlight record to show details:'. The main table has the following data:

Invoice Number	Account	Rec'd Date	Check	Invoice	Received
10A-1118-00004	CASH WALK-IN	12/27/2010	C-Card	65.00	65.00
	0000 0000 0000 0000	0/0/0000		multiple pmts	

At the bottom of the window, there is a 'Payment Method' section with fields for 'Credit Card', 'Card Number', 'Expires', 'Authorization', and 'received by'. To the right of this is a 'Search by' section with fields for 'Check Number' (containing '0004') and 'Account Name'. At the very bottom, there are 'Print Payment Report', 'Delete', and 'Cancel' buttons.

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.

The screenshot shows a window titled "Sales Report Generator". At the top, there are standard window controls (minimize, maximize, close). Below the title bar, the text "Enter Dates or Select Period:" is centered. Underneath this, there are four labels: "Start Date", "Stop Date", "Or Choose Day(s)", and "Or Month". Below these labels are four input fields. The first two fields contain the dates "1/1/2011" and "1/31/2011" respectively, and each has a small calendar icon to its right. The third field is empty and has a dropdown arrow. The fourth field contains the text "January" and also has a dropdown arrow. Below these fields is a section titled "Generate Report Based Upon:". Under this title is a dropdown menu with "Invoices" selected. Below this section is another section titled "Or Generate Item Sales Report On:". Under this title is an empty dropdown menu. At the bottom left, the text "Print to: (optional)" is followed by a small icon and a table with two columns: "ID" and "Printer Name". The table has two rows, both of which are empty. At the bottom right, there are three buttons: a "Print" button, a "Close" button, and an empty button.

Sales Report Generator

Enter Dates or Select Period:

Start Date: 1/1/2011 Stop Date: 1/31/2011 Or Choose Day(s): Or Month: January

Generate Report Based Upon: Invoices

Or Generate Item Sales Report On:

Print to: (optional)

ID	Printer Name

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.

Calculate and Report Tax Liabilities

Choose Type
 Report: by all invoices within the period ☒ Include Zero Tax Invoices

Choose Date Range
 from: 1/1/2011 to: 1/31/2011 or select month: January

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

Print Results
 ☐ With More Details

Invoice Number ▼

Setting up the Scheduler

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

To set your 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.

Scheduling Setup

Site: Josh's Glass JG

Technician or Bay

Add Remove

Enk
Nick
Dusty
Shop

Job Status Code

Code Description

Add Remove

NS No Show
RS Rescheduled
IP In Progress

Setup the Starting time for Each Job

Initialize Site, Day, and Times

First Job 8:00:00 AM
Last Job 4:00:00 PM
Increment by 60 min.

Day

Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday

Time

8:00:00 AM
9:00:00 AM
10:00:00 AM
11:00:00 AM
12:00:00 PM
1:00:00 PM
2:00:00 PM
3:00:00 PM
4:00:00 PM

Save this Day

Don't schedule this site

Save

Close

Delete Site: Delete

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.

Save

quote
work order
invoice

Schedule

Run Credit Card

Pay

Send to Glaxis

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

Schedule for Josh's Glass

Assign WJG-0511-00001

Jump to date: Reserve Next Time Slot

TUE 5/11/2010

8:00:00 AM
9:00:00 AM
10:00:00 AM
11:00:00 AM
12:00:00 PM
1:00:00 PM
2:00:00 PM
3:00:00 PM
4:00:00 PM

Remove

Show Past for 1 days

Retrieve Work Order

Show ahead for 8 days

Close

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 Chevrolet Silverado 200CB PICKUP K1500

Part #	Description	Glass	PO Number	QTY	K/L	Labor	List	Discount	Net
DD111750TNN	Quarter (left)(color)(Movable) 07-10			1.70	0.00		214.05		
DD111747TNN	Quarter (right)(color)(Movable) 07-10			1.70	0.00		214.05		
DD111642TNN	Door (left)(front)(color) 07-10			2.10	0.00		206.70		
DD111635TNN	Door (right)(front)(color) 07-10			2.10	0.00		206.70		
DB11388TNN	Back Window (center)(color)(Power) 07-10			0.00	0.00		352.70		
15943271	Moulding (I) RIGHT OUTER L/R Gate (GM)			3			75.61		
25852724	Moulding (I) RIGHT INNER L/R Gate (GM)			4			34.98		
15844877	Moldo (M) RIGHT INNER L/R Gate (GM)			6			133.86		
25852895	Regulator (M) RIGHT INNER L/R Gate (GM)			5			121.48		

Check box to: ☒ Make PNA PO ☐ Make PO ☐ Authorize ?

Install Location: Bus / Pers. < Mobile Vehicle Color: Advertising: Installer: Job Status: 3:28:15 PM

Comments: Sched: Invoice 4/8/2010

QUOTE MASTER: Clear Restart Print Email Fax

Customer / Insured: PO Nbr: Stock: License: Mileage: VIN: AUTH: DOL: Policy: Agent: REF#

Save quote work order invoice Schedule Run Credit Card Pay Send to Glass

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.

2010 Chevrolet Camaro 2 Door Coupe

Part #	Description	Glass	PO Number	QTY	K/L	Labor	List	Discount	Net
DW018145TNN	Windshield (color)(w/Third View F/R)(w/Remote Start) 10-10			3.30	0.00		786.40		
DW018135TNN	Windshield (color)(w/Third View F/R) 10-10			3.30	0.00		722.65		
DQ117150TNN	Quarter (left)(encapsulated)(color) 10-10			1.90	0.00		461.80		
DQ117150TNN	Quarter (right)(encapsulated)(color) 10-10			1.90	0.00		461.80		
DD117175TNN	Door (left)(front)(color) 10-10			1.40	0.00		353.60		
DD117155TNN	Door (right)(front)(color) 10-10			1.40	0.00		353.60		
H4H00004	Adhesive (I) (I)			0			22.95		
H4H00048	Adhesive (I) (I)			0			42.50		
5221352	Cover (M) L/R Gate (GM)			9			3.42		
MWD1813	Moulding (I) UPPER Right (C/R)(EXTR)			3			49.56		

Check box to: ☒ Make PNA PO ☐ Make PO ☐ Authorize ?

Install Location: Bus / Pers. < Mobile Vehicle Color: Advertising: Installer: Job Status: 3:02:25 PM

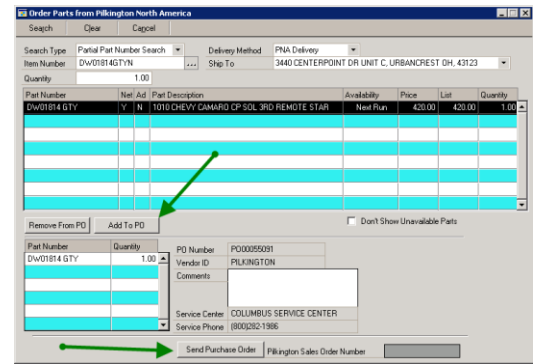
Comments: Sched: Invoice 4/8/2010

QUOTE MASTER: Clear Restart Print Email Fax

Customer / Insured: PO Nbr: Stock: License: Mileage: VIN: AUTH: DOL: Policy: Agent: REF#

Save quote work order invoice Schedule Run Credit Card Pay Send to Glass

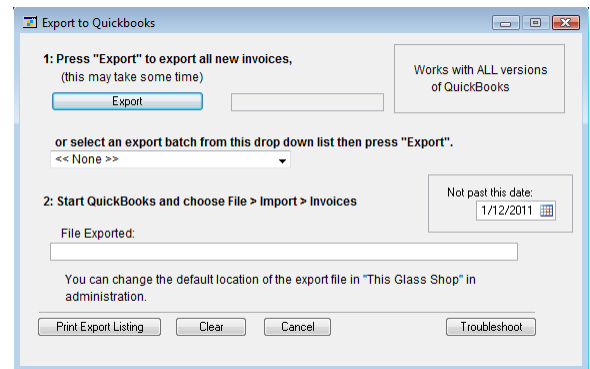
Then in the next window click add to PO and then click send PO you will then get a Pilkington sales order number to confirm the order.



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.

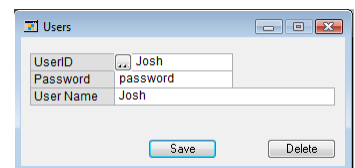
Then go to Admin > Export to Quickbooks and click Export. If you get an error about a tax group it is because all of your invoices do not have a tax group, if you aren't charging tax you still have to use the exempt group.



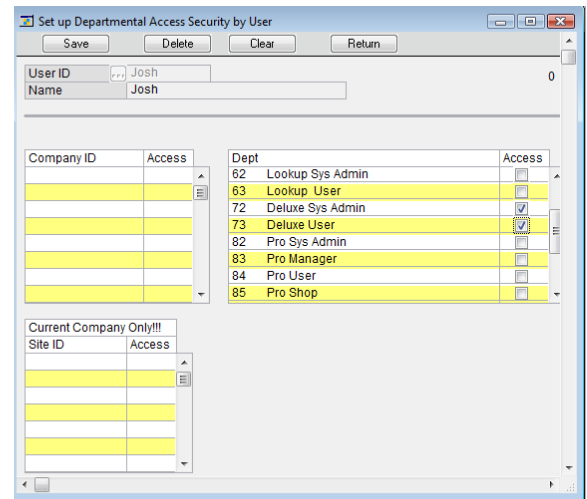
Then go into your Quick Books and go to File > Import > IIF file and then import the files generated in GlassShop.

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.

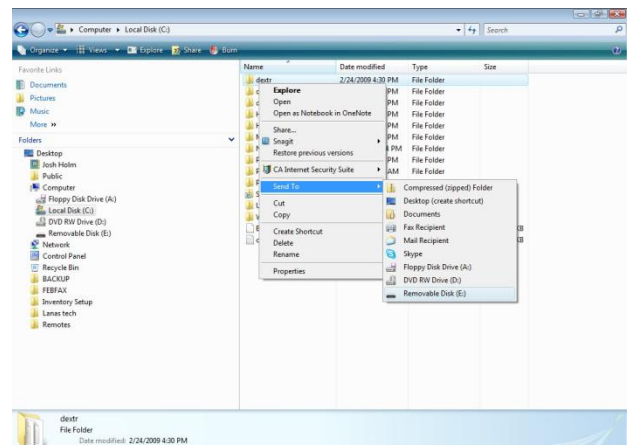


Backing up GlassShop is Easy

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 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>