

QUEST glassquote seven

**Quick Start Guide
NON-HOSTED/Local Drive VERSION**

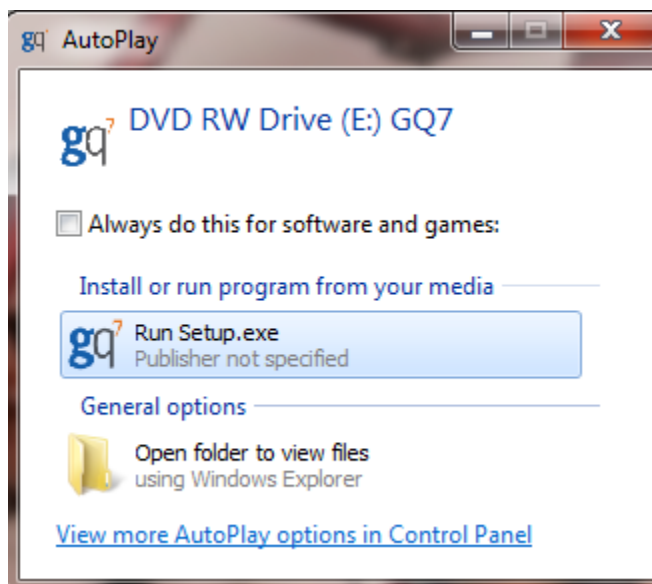


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Installing GQ7 Server

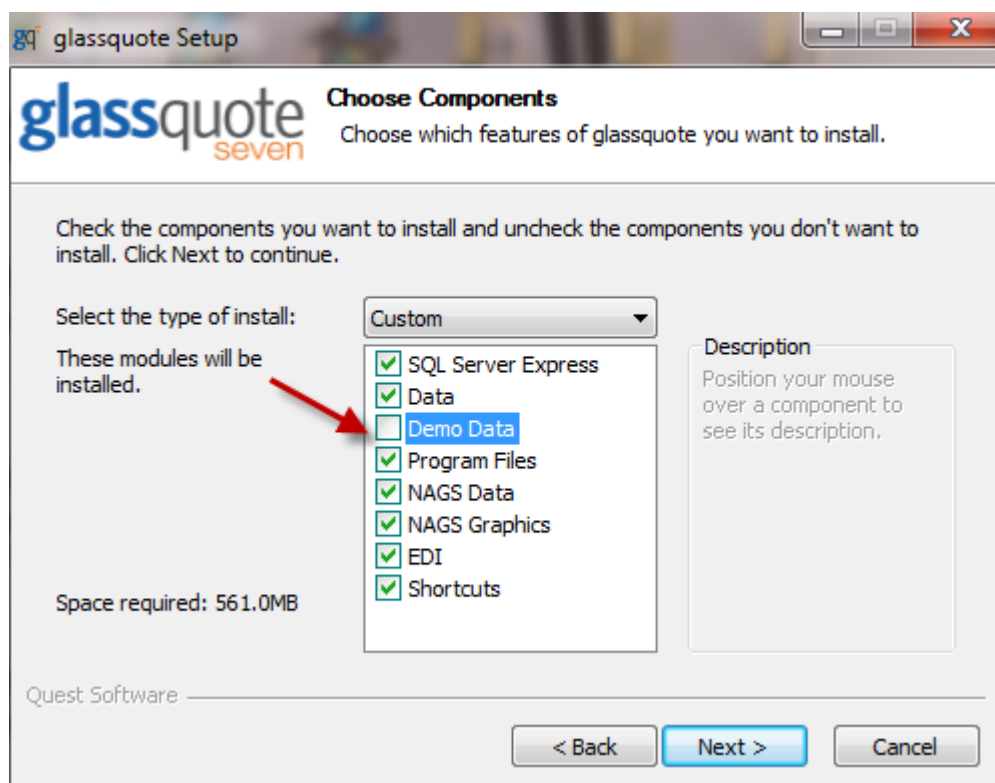
1. Place the CD in the Rom drive of the main machine that will hold the data, this is considered your Server.
2. If the disk does not start automatically you can go to Computer and right click on the cd rom and open it.



3. Double Click on Run Setup.exe
4. The Welcome to Glassquote Setup Wizard will come up. Click on Next.
5. Read and click I agree to the license agreement to continue the installation.

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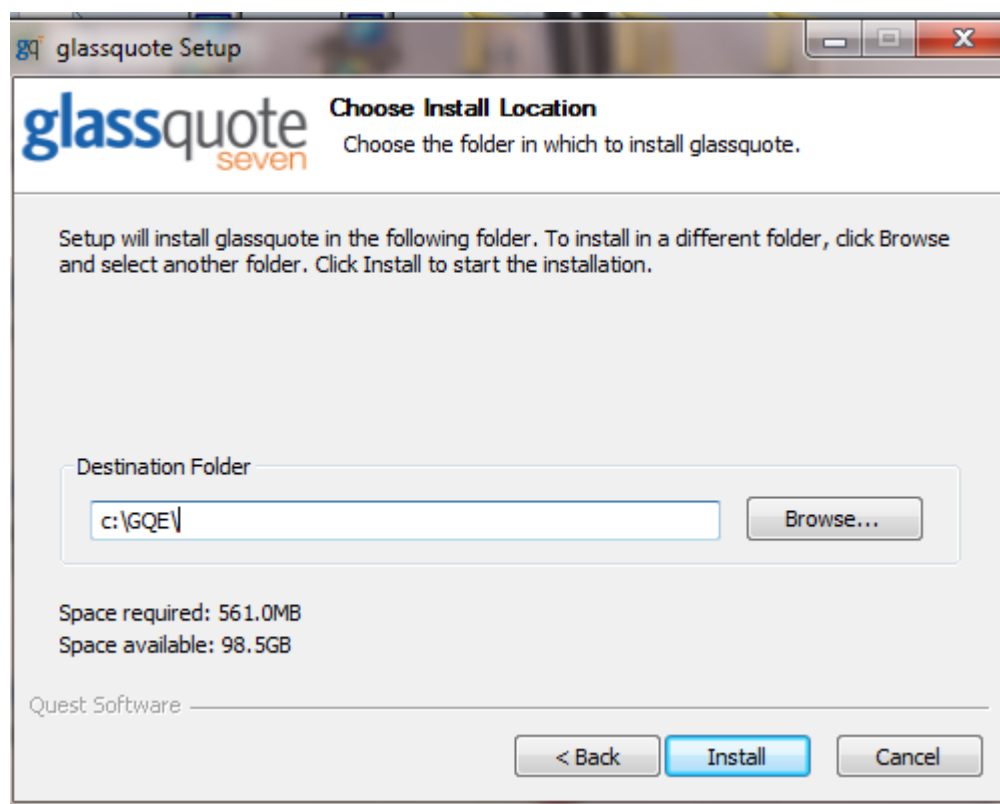
- To install the software without the Demo data, uncheck the Demo Data.



- Click Next

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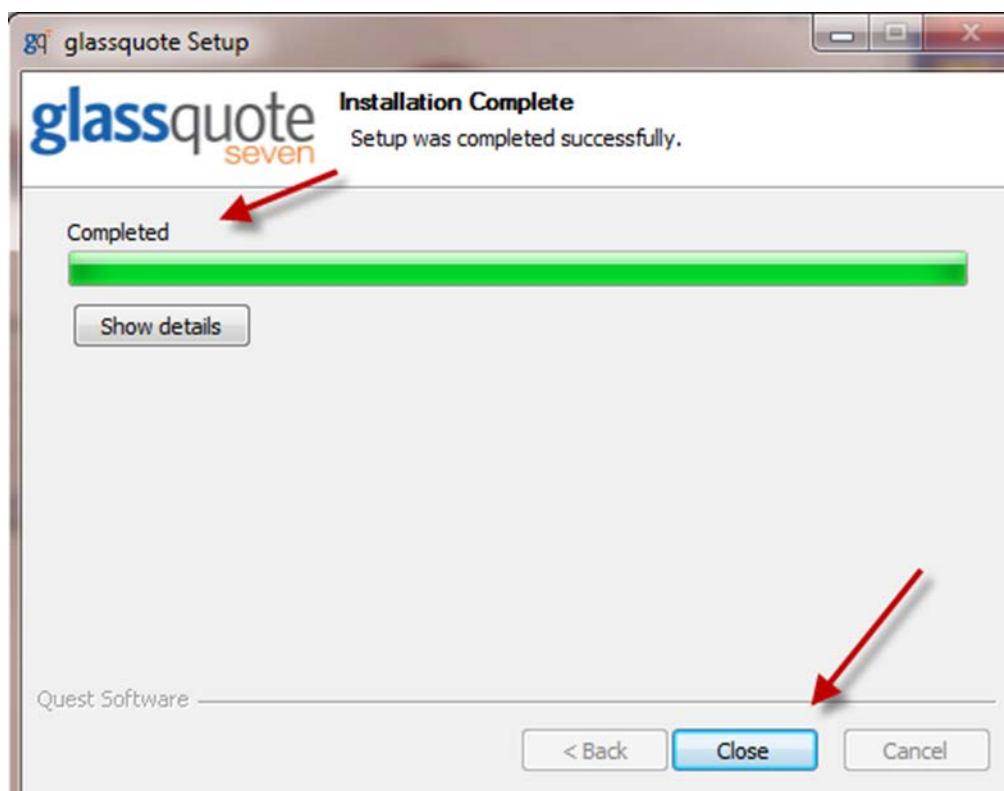
8. The Destination Folder should be C:\GQE\



9. Click Install

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Once the Installation has been completed:

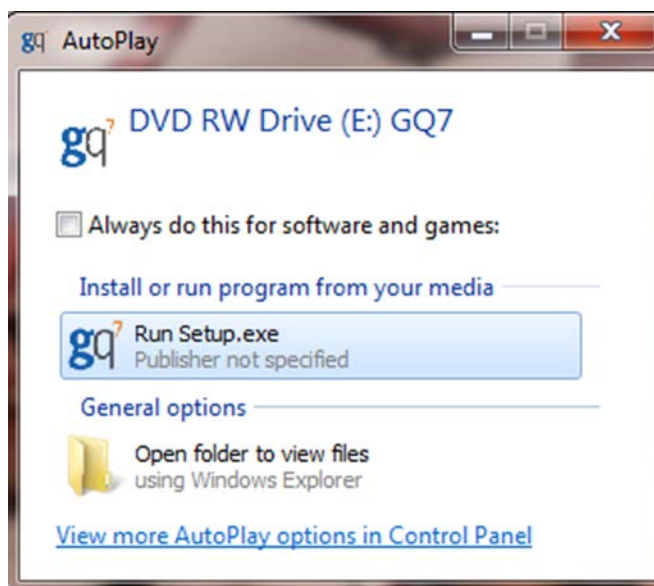


Your software will install and place an icon on your desktop.

Installing GQ7Network Clients

A network client is a computer that will be using the software connected to your server.

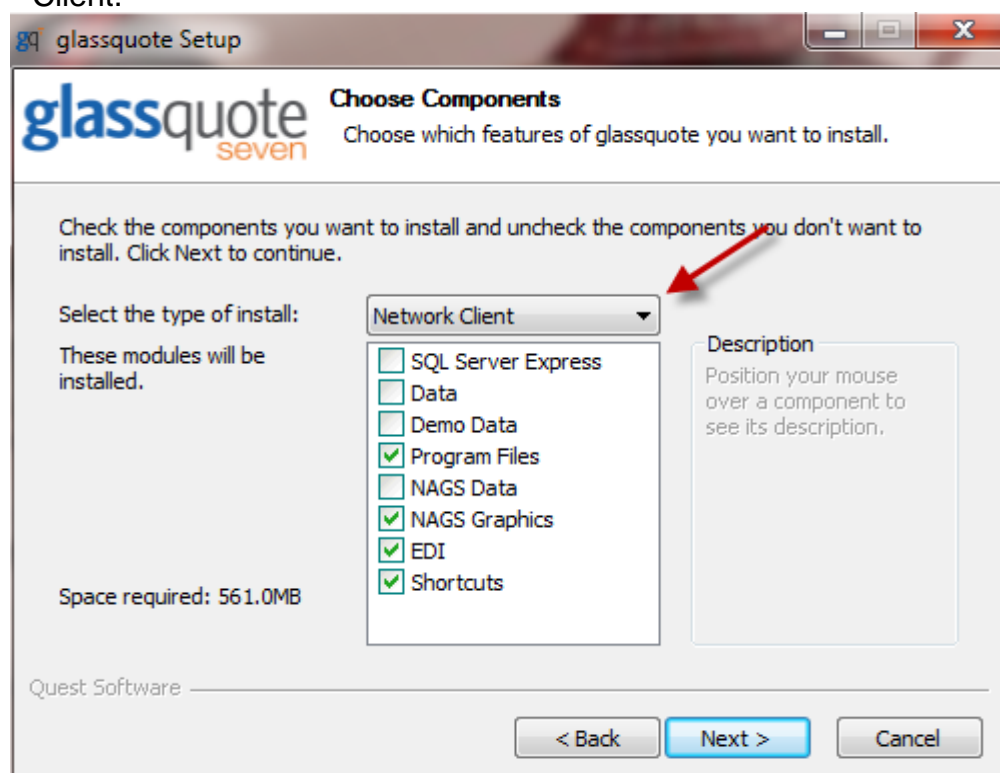
1. Place the CD in the Rom drive of the network client computer.
2. If the disk does not start automatically you can go to Computer and right click on the cd rom and open it.



3. Double Click on Run Setup.exe
4. The Welcome to glassquote Setup Wizard will come up. Click on Next.
5. Read and click I agree to the license agreement to continue the installation.

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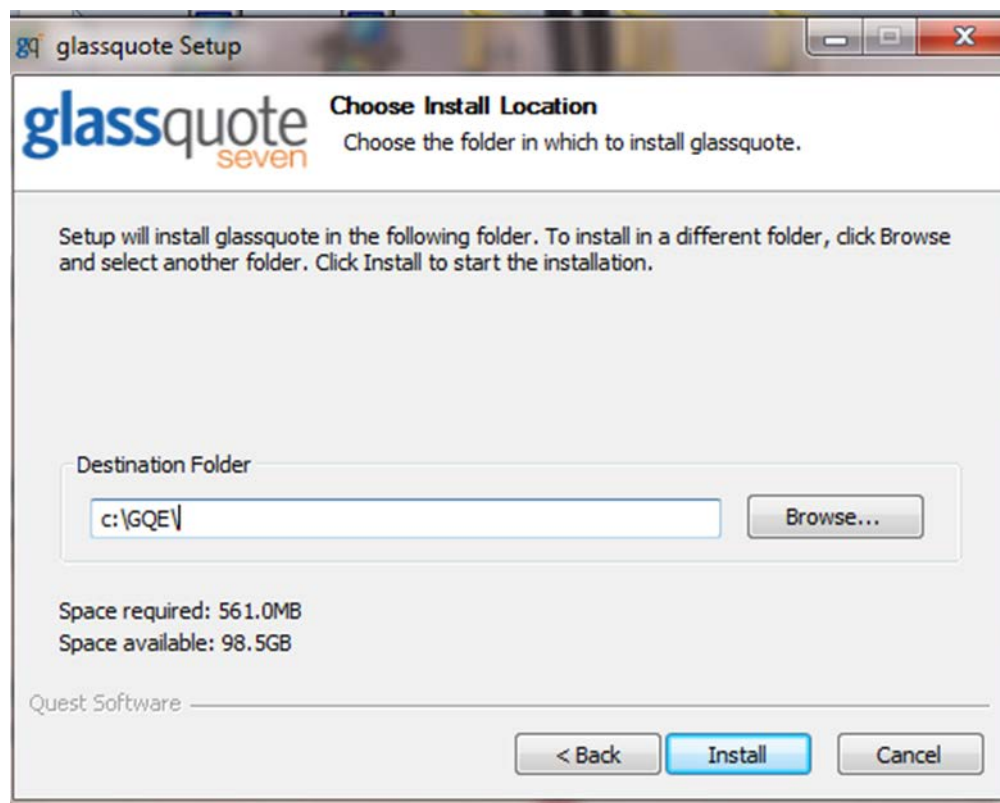
6. Select the type of install: From the drop down menu chose Network Client.



7. All of the components that are necessary for a Network Client Install will be checked.

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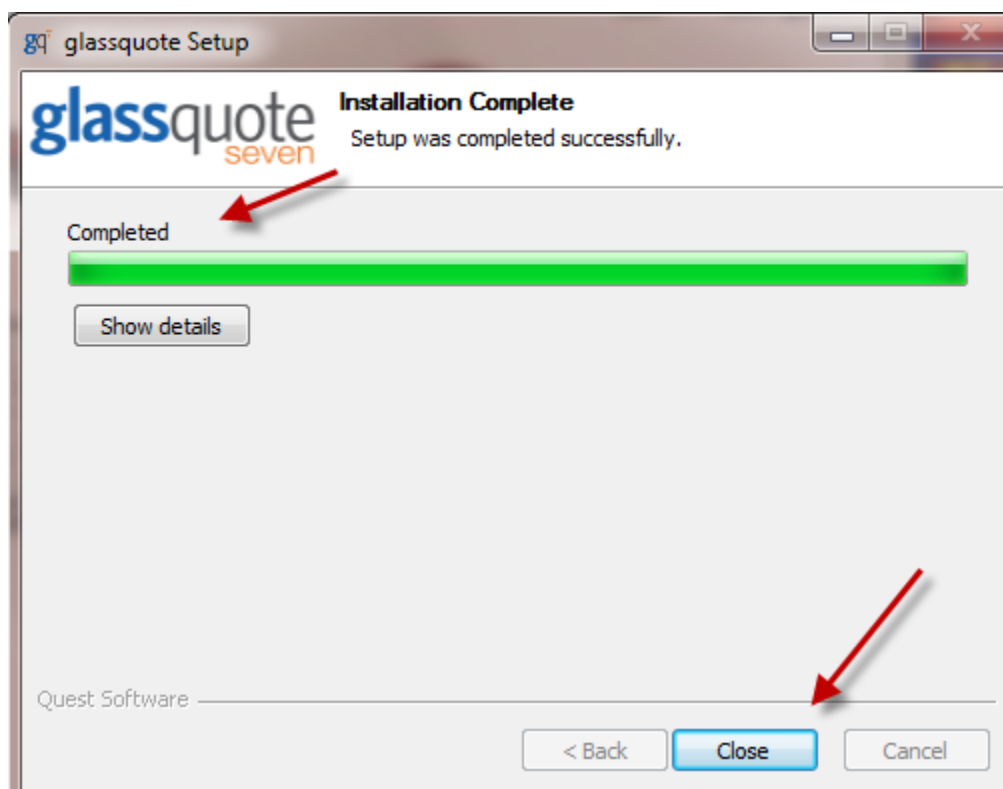
8. The Destination Folder should be C:\GQE\



9. Click Install.

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Once the Installation has been completed:



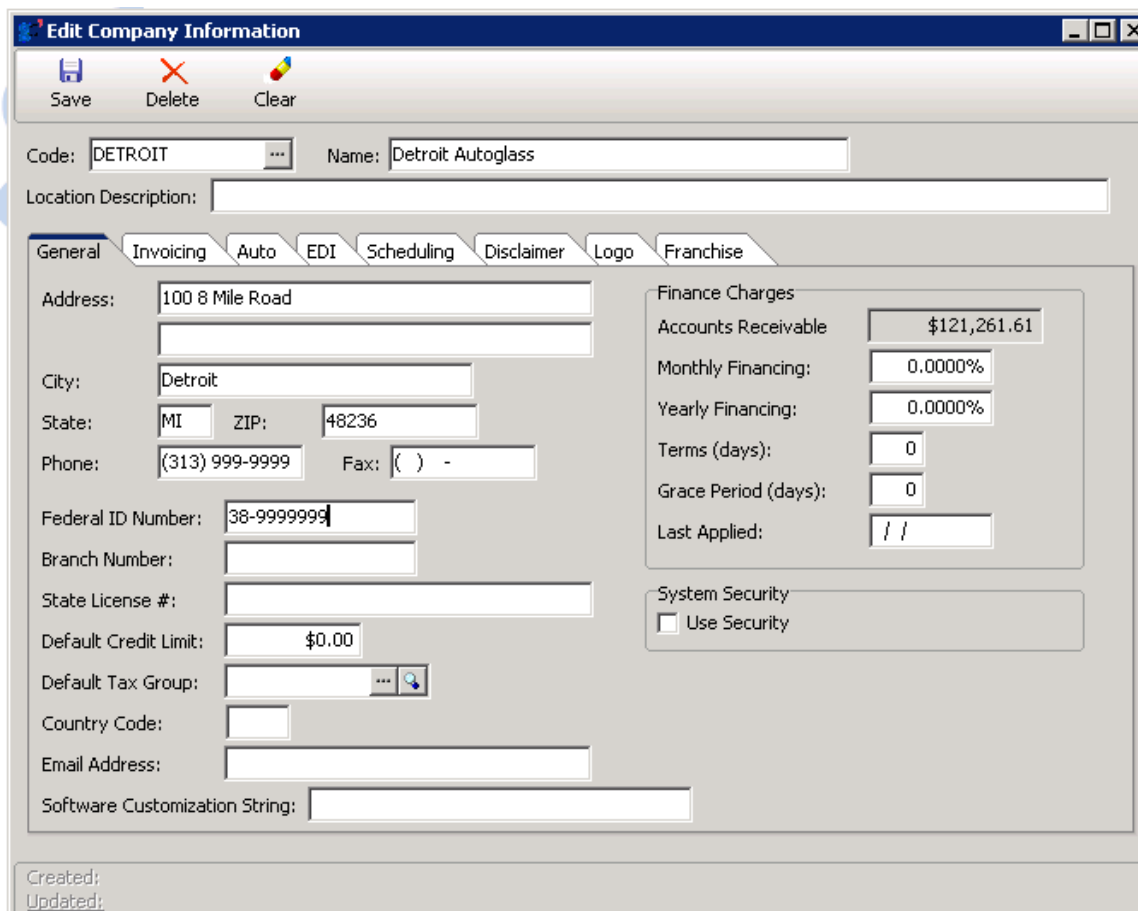
10. Click on Close, there will be an icon placed on the desktop.

Getting Started using GQ7

COMPANY SCREEN ENTRY:

You now need to enter in the “basics” on the Company Screen and Register:

1. Click on Utilities and Company Information.
2. At the General Tab, enter Code. This is your location identifier. For example, if you own 3 stores, you may want to use the city name for each location. If you only have one location, you will still need to enter a Code, Name and Location Description.
3. Enter your Company Name, Address, City, State, ZIP, Phone and Federal ID Number.



Edit Company Information

Save Delete Clear

Code: DETROIT Name: Detroit Autoglass

Location Description:

General Invoicing Auto EDI Scheduling Disclaimer Logo Franchise

Address: 100 8 Mile Road

City: Detroit

State: MI ZIP: 48236

Phone: (313) 999-9999 Fax: () -

Finance Charges

Accounts Receivable	\$121,261.61
Monthly Financing:	0.0000%
Yearly Financing:	0.0000%
Terms (days):	0
Grace Period (days):	0
Last Applied:	//

System Security

Use Security

Federal ID Number: 38-9999999

Branch Number:

State License #:

Default Credit Limit: \$0.00

Default Tax Group:

Country Code:

Email Address:

Software Customization String:

Created:
Updated:

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***Please note that changing ANY of the ABOVE information will cause the software to call for a new registration number. You can safely change any of the other company options without the software requiring re-registration.

4. Click on the Invoicing Tab and pick an Alpha Letter for an invoice prefix – again if you own three stores, you may want to use the first letter of the city name for each.

The screenshot shows the 'Edit Company Information' window with the following details:

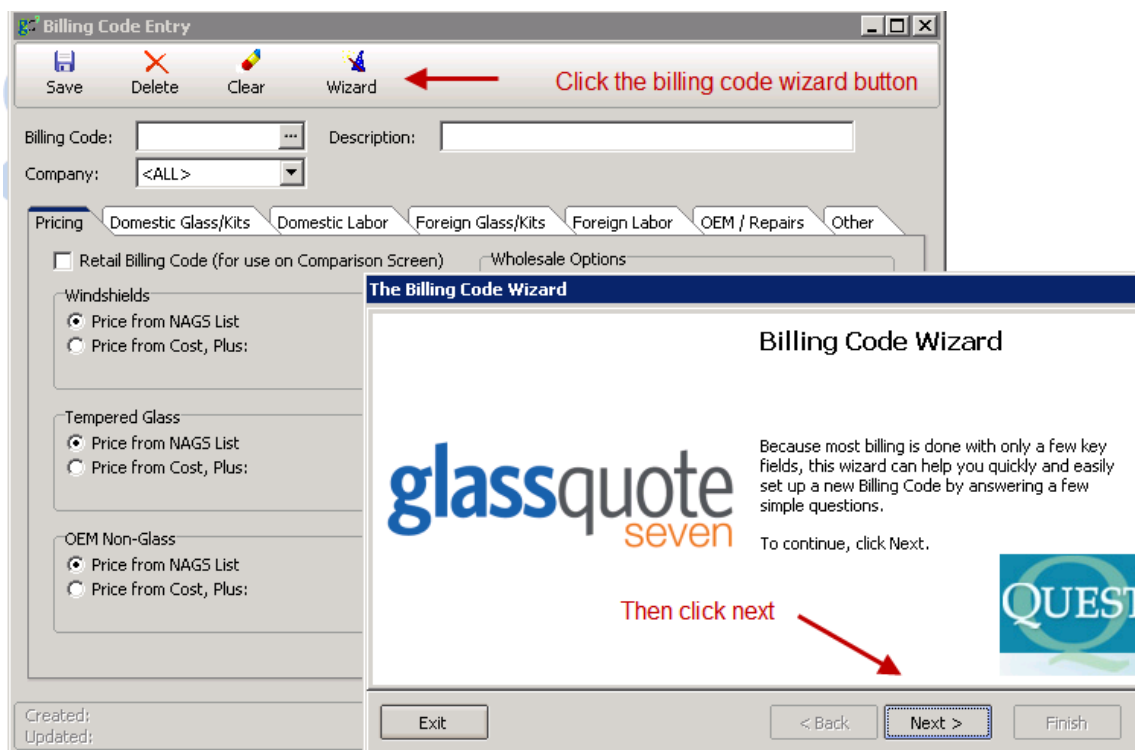
- Title Bar:** Edit Company Information
- Buttons:** Save, Delete, Clear
- Code:** DETROIT
- Name:** Detroit Autoglass
- Location Description:** (Empty)
- Tabs:** General, Invoicing (selected), Auto, EDI, Scheduling, Disclaimer, Logo, Franchise
- Invoice Prefix:** D (indicated by a red arrow)
- Last Invoice #:** 0
- Use Separate Numbers for Work Orders:**
- Last Work Order #:** 0
- Last Quote #:** 0
- Invoice Form Type:** C
- Invoice Customization (all unchecked):**
 - Prompt for Invoice Number
 - Edit Document Date
 - Allow Reprinting Invoices
 - Print Terms on Invoice
 - Custom Invoice Forms
 - Do not include Labor in Subtotal
 - Do not print "DUPLICATE" on reprinted documents
 - Automatically display Order window when saving a Work Order
 - Automatically display Order window when saving an Invoice
 - Do not allow Invoicing if part is unavailable
 - Do not print prices on Work Orders
 - Do not prompt for Deposit when saving Work Orders
 - Do not prompt for Payment when saving Invoices
- Default Salesman for Cash Customers:** (Empty)
- Invoice Note:** (Empty)
- Footer:** Created: Updated:

This is the “minimum” amount of information that needs to be entered in the Company Information screen in order to register your software. Click the blue SAVE button in the upper-left and call Quest for a registration number.

BILLING CODES:

The next step will be to set up three (3) Retail Billing codes.

1. Go to Maintenance, Miscellaneous, Billing Codes.
2. Click the Wizard button at the top to begin entering a Billing Code.



3. We recommend using three (3) pricing levels for Retail, changing the mark up on the GLASS only, you may use the same KIT and LABOR pricing for all three levels (this will also be used in the Profit Protector feature). Examples of the three (3) retail pricing levels are below.

R1 – Retail Level 1 (Cost + flat dollar or percentage markup on the glass, KIT pricing, and LABOR rate)

R2 – Retail Level 2 (Cost + lesser flat dollar or percentage markup on the glass, KIT pricing and LABOR rate)

R3 – Retail Level 3 (Cost + your lowest flat dollar or percentage markup on the glass, KIT pricing and LABOR rate)

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4. Refer to the red information on the following screen shots for instructions on the Billing Code Wizard entry.

The Billing Code Wizard

Code and Description
Enter an identifier for your billing code and a longer description. Click Next to continue.

Billing Code: ← **Create Retail Level 1 discount**

Description:

Click NEXT

Exit < Back Next > Finish

The Billing Code Wizard

Foreign and Domestic Glass
Many businesses do not differentiate between glass made for foreign or domestic vehicles when determining their pricing. If you wish to enter different pricing for foreign and domestic glass, then check the box below. Otherwise, leave it unchecked.

Use different discounts for Foreign and Domestic:
(Check this box if you have different discounts on glass for foreign and domestic vehicles.)

Click NEXT

Exit < Back Next > Finish

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Insurance Screen | Wholesale Options

The Billing Code Wizard

NAGS Discounts or Cost Plus?
 In insurance situations, pricing is usually based on NAGS List. In retail situations, pricing can be added onto the actual cost of the glass (or non-glass part). Simply select the type of pricing structure that you intend to use in each of the following areas.

Windshields
 Price from NAGS List
 Price from Cost, Plus: Percent Flat Dollar Amount

Tempered Glass
 Price from NAGS List
 Price from Cost, Plus: Percent Flat Dollar Amount

OEM Non-Glass
 Price from NAGS List
 Price from Cost, Plus:

Exit < Back Next > Finish

The Billing Code Wizard

Pricing
 Many businesses generalize their pricing structure into the following three areas. However, this may not cover all situations. After this wizard is complete, you can change these values in the main Billing Code Entry window.

If you previously selected "Cost Plus" pricing, simply enter the amount or percentage that you wish to markup from cost. If you previously selected to "Price from NAGS List", then all amounts should be entered as multipliers. e.g. A 15% markup from NAGS list price would be entered as 115.00 (100% + 15%), and a 15% discount would be entered as 85.00 (100% - 15%).

Windshields: ← Enter 50 to mark up your cost of the glass \$50

Tempered: ←

OEM glass, mldgs, etc.:

Exit < Back Next > Finish

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The Billing Code Wizard

Kit Prices

Many businesses generalize kit prices into the following three areas. However, this may not cover all situations, such as different prices for additional quantities. After this wizard is complete, you can change these values in the main Billing Code Entry window.

Butyl, Urethane and Primers:	<input type="text" value="20.00"/>	Flat	←
Fast Cure System:	<input type="text" value="20.00"/>	Flat	←
High Modulus/Non-conductive:	<input type="text" value="30.00"/>	Flat	←

Enter pricing for KITS

Exit < Back **Next >** Finish

The Billing Code Wizard

Types of Labor Rates

You may handle labor rates in several different ways. You may charge a flat rate, you may charge an hourly rate, and you may do a combination of flat and/or hourly rates.

Labor Rates

Flat Labor Rate ← Choose flat or hourly labor rates

Hourly Labor Rate

Combination of Flat and/or Hourly Rates


Exit < Back **Next >** Finish


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The Billing Code Wizard


Labor Rates

Simply enter in the appropriate labor rate. If you feel this has oversimplified the rates you charged, press the back button and select a different option, or continue and then modify the labor rates from the main Billing Code Entry window.

Windshield Labor Rate: Flat Rate 

Tempered Glass Labor Rate: Flat Rate 

Enter labor rates






Exit Finish

The Billing Code Wizard

Repairs

If repairs are considered Labor, for accounting and tax purposes, check the appropriate box. Enter rates for the first, second, and third repairs. You may also enter rates for the specified crack sizes and for headlamp repairs.

Repairs are considered Labor 

1st Repair:  6" Crack: 

2nd Repair:


3rd Repair:

12" Crack:

18" Crack:

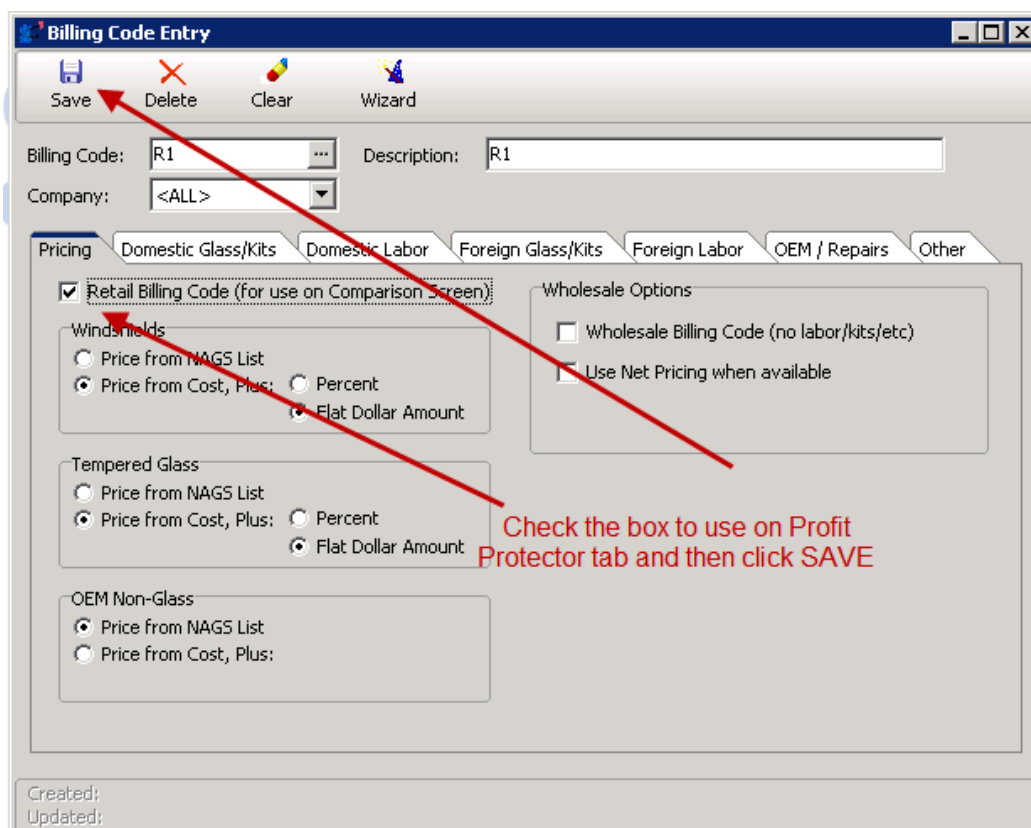
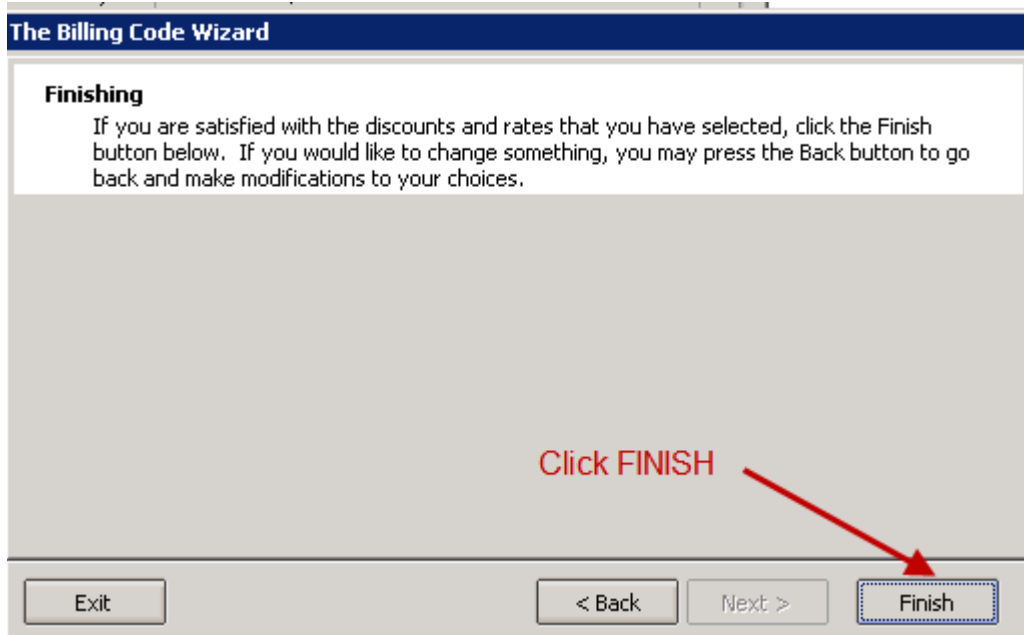
Head Lamp:

Enter Repair Pricing



Exit Finish

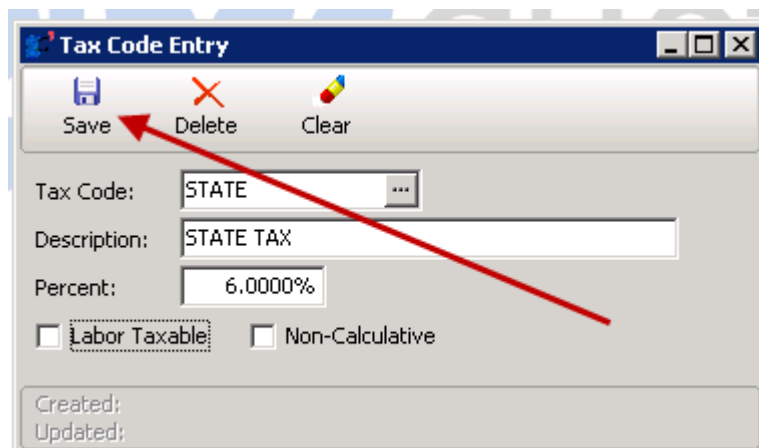
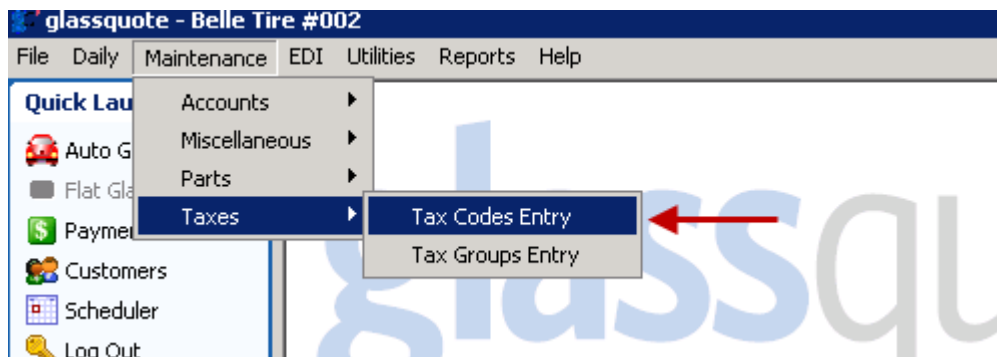
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We recommend that you use the Billing Code Wizard two more times and enter pricing for R2 and pricing for R3.

TAX ENTRY

You will need to attach a Default Tax Group to your Company Information. TAX GROUPS are made up of TAX CODES. Enter the Tax Codes first.



Examples of Tax Codes:

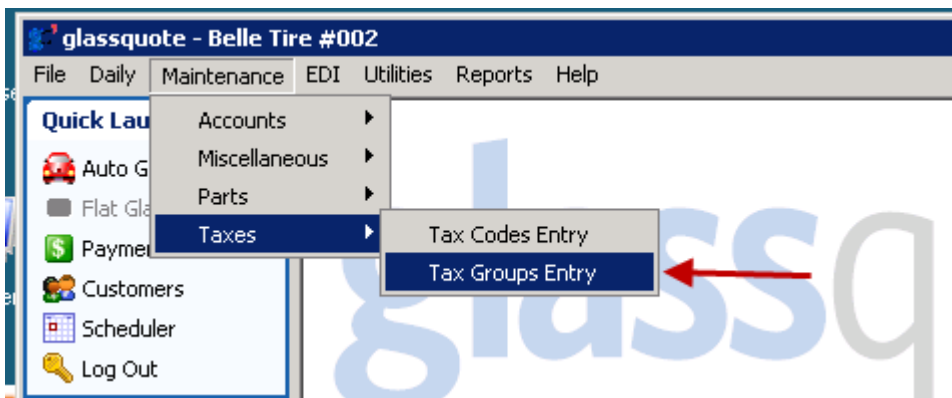
CTY – CITY TAX RATE and Percentage

STATE – STATE TAX RATE and Percentage

EXEMPT – EXEMPT TAX RATE and Percentage of 0%

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Create your Tax Group using the entered Tax Codes.





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Enter Tax Group and Description. For the Tax Code, enter each level of tax, example: Tax Code 1 state tax, Tax Code 2 county tax and Tax Code 3 city tax. Click on Save.

Make sure to attach your Default Tax Group to your Company Information. This is on the General tab.

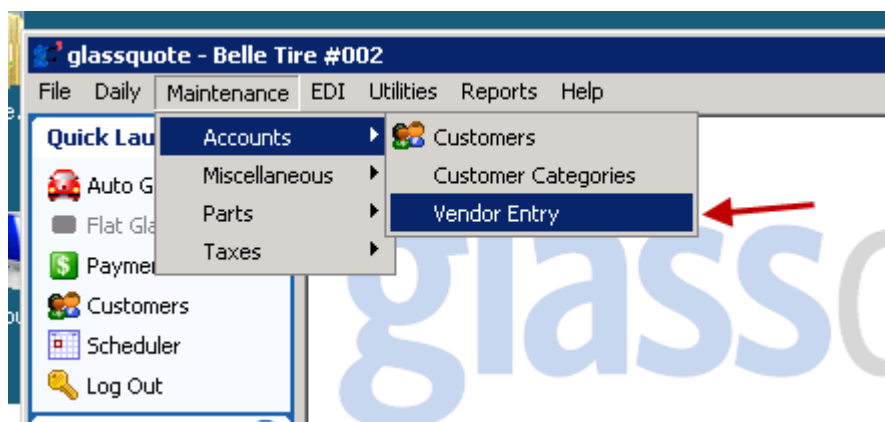
VENDOR ENTRY

Set up your VENDORS for querying/pricing glass. Quest is able to query your pricing for the below listed vendors.

Pilkington – Contact them and ask for an E-POS login (not the e-premiere login).

PGW – You will need an active account, e-mail tech@questsoftware.com your Company name, address and federal tax id and we will then request your electronic point of sale login from them on your behalf.

Mygrant – Once you have an active account and can buy glass ONLINE from them, e-mail tech@questsoftware.com and we can assist setting up GQ7 to use that login to query/order glass.



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SETTING COMPANY DEFAULTS:

1. From main menu, click Utilities and then Company Information.
2. On the **GENERAL TAB**, set your Default Tax Group.

Edit Company Information

Save Delete Clear

Code: DETROIT Name: Detroit Autoglass

Location Description:

General Invoicing Auto EDI Scheduling Disclaimer Logo Franchise

Address: 100 8 Mile Road

City: Detroit

State: MI ZIP: 48236

Phone: (313) 999-9999 Fax: () -

Federal ID Number: 38-9999999

Branch Number:

State License #:

Default Credit Limit: \$0.00

Default Tax Group: MI Michigan Sales Tax

Country Code:

Email Address:

Software Customization String:

Finance Charges

Accounts Receivable: \$121,261.61

Monthly Financing: 0.0000%

Yearly Financing: 0.0000%

Terms (days): 0

Grace Period (days): 0

Last Applied: / /

System Security

Use Security

Created:
Updated:

You may click the 3 dots button [...] to lookup your previously-entered tax groups

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3. Click on the **INVOICING TAB** and check the options to automatically display order window when saving a workorder AND automatically display order window when saving an invoice.

Edit Company Information

Save Delete Clear

Code: DETROIT Name: Detroit Autoglass

Location Description:

General Invoicing Auto EDI Scheduling Disclaimer Logo Franchise

Invoice Prefix: D

Last Invoice #:

Use Separate Numbers for Work Orders

Last Work Order #: 0

Last Quote #: 0

Invoice Form Type: C

Invoice Customization

- Prompt for Invoice Number
- Edit Document Date
- Allow Reprinting Invoices
- Print Terms on Invoice
- Custom Invoice Forms
- Do not include Labor in Subtotal
- Do not print "DUPLICATE" on reprinted documents
- Automatically display Order window when saving a Work Order
- Automatically display Order window when saving an Invoice
- Do not allow Invoicing if part is unavailable
- Do not print prices on Work Orders
- Do not prompt for Deposit when saving Work Orders
- Do not prompt for Payment when saving Invoices

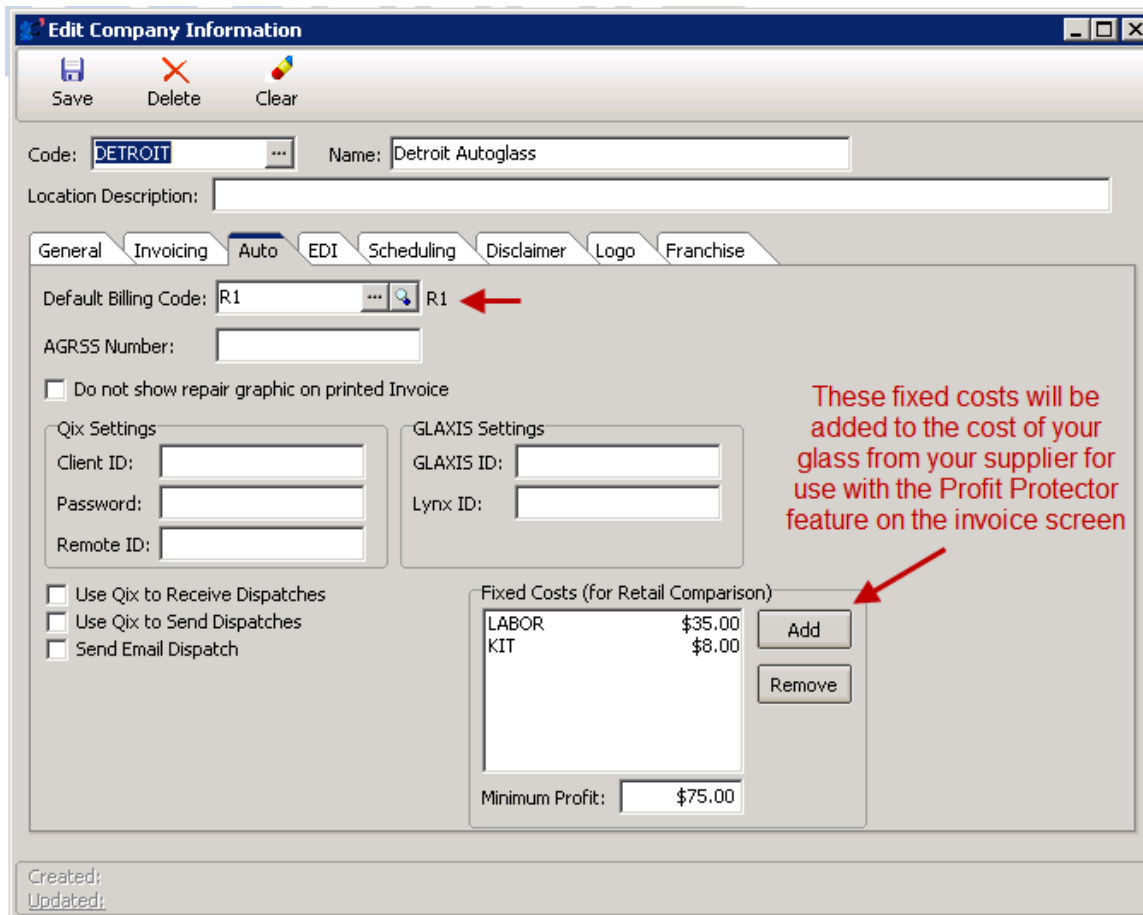
Default Salesman for Cash Customers:

Invoice Note:

Created:
Updated:

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4. Click on the **AUTO TAB** and set your default billing code to R1.
5. You should then set your **FIXED COSTS** that will be used for the **PROFIT PROTECTOR** feature of GQ7. Most people will set a **FIXED COST** of around \$8 for a **KIT** and around \$35 for **LABOR** and set a **MINIMUM PROFIT AMOUNT** for each job. These settings are used for your **PROFIT PROTECTOR FEATURE** in GQ7.



Edit Company Information

Save Delete Clear

Code: **DETROIT** Name: Detroit Autoglass

Location Description:

General Invoicing **Auto** EDI Scheduling Disclaimer Logo Franchise

Default Billing Code: R1 R1

AGRSS Number:

Do not show repair graphic on printed Invoice

Qix Settings
 Client ID:
 Password:
 Remote ID:

GLAXIS Settings
 GLAXIS ID:
 Lynx ID:

Use Qix to Receive Dispatches
 Use Qix to Send Dispatches
 Send Email Dispatch

Fixed Costs (for Retail Comparison)

LABOR	\$35.00	Add
KIT	\$8.00	Remove

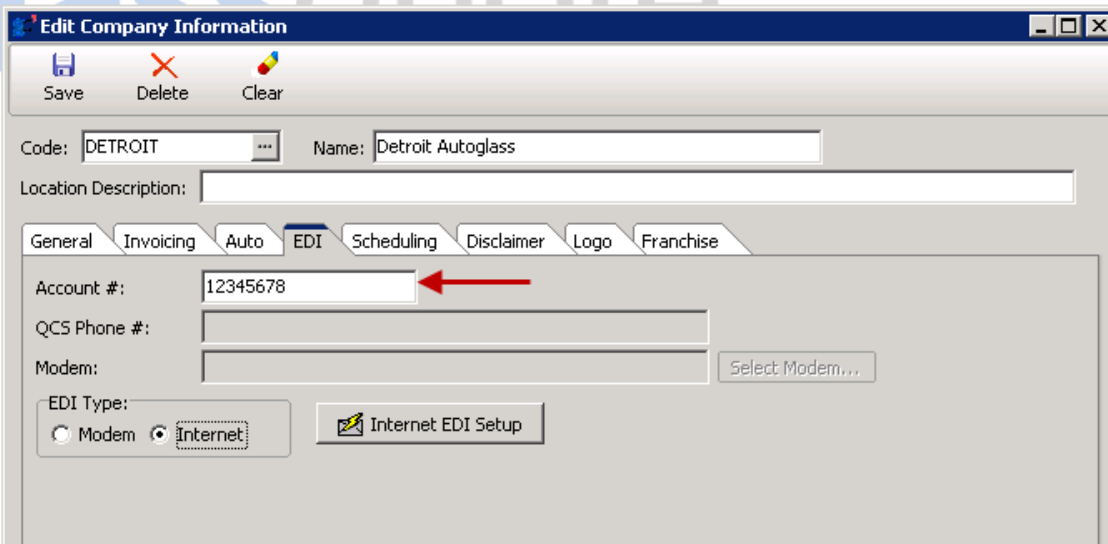
Minimum Profit: \$75.00

Created:
Updated:

These fixed costs will be added to the cost of your glass from your supplier for use with the Profit Protector feature on the invoice screen

EDI

You must sign and return the EDI services agreement to Quest and we will assign a QCS account number. E-mail tech@questsoftware.com for assistance.

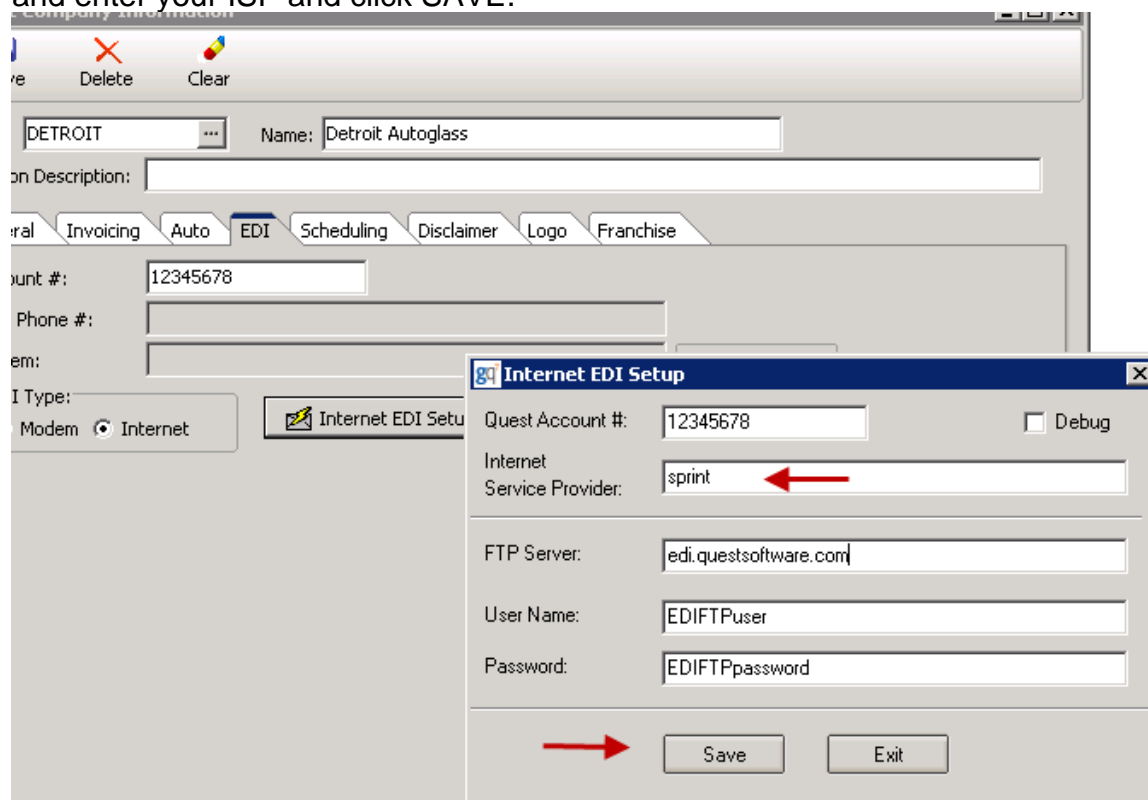


The screenshot shows a software window titled "Edit Company Information". At the top, there are three buttons: "Save", "Delete", and "Clear". Below these are two text fields: "Code: DETROIT" and "Name: Detroit Autoglass". A "Location Description:" field is empty. A tabbed interface is visible with tabs for "General", "Invoicing", "Auto", "EDI", "Scheduling", "Disclaimer", "Logo", and "Franchise". The "EDI" tab is selected. In this tab, there are three text fields: "Account #:" containing "12345678", "QCS Phone #:" (empty), and "Modem:" (empty). A "Select Modem..." button is next to the "Modem:" field. Below these fields are two radio buttons for "EDI Type": "Modem" (unselected) and "Internet" (selected). An "Internet EDI Setup" button is also present.

1. From the EDI tab on your Company Information screen, enter your ACCOUNT # (this is assigned from QUEST)

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2. Click the INTERNET radio button and then the Internet EDI Setup Button and enter your ISP and click SAVE.



3. Click on the Save button in the upper left hand corner of the Company Information screen to save all entered data.