



2015 WinNetStar Training Classes

Back Order Process

Software Development-M2
RIMSS Business Systems Technology

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Back Order Process

RIMSS WinNetStar v7.0.0.1433 Enterprise: The Enterprise Company: RIMSS TRACTOR AND EQUIPMENT (2) Location: RIMSS - SAN ANTONIO (3)

File View Company Customer CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholegoods Lesse Rental Reports Web Links Windows Scheduling Help

RIMSS WinNetStar New Sales Order

File Save Save and New Save and Close Print Credit Cards Capture Signature Show Open Documents

General Attachments Print History Wholegoods Document Register Document Register Detail Order Status Report Customer Master

Document Type: Sales Order Document #: 0 Invoice #: 0 Document Date: 2/6/2015
 Status: Open Customer PO#: Salesman: MICHAEL S... CC Auth. #:

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address
 Name: PACIFIC FARMING CO
 Address 1: 2710 TREBLE CREEK
 Address 2:
 Attention:
 City: SAN ANTONIO
 State: TX Zip Code: 78258
 Primary Contact: THOMPSON, DAVID (338) 020-1462

Shipping Information
 Ship To Shipping Method:
 Shipment Date: 2/6/
 Address 1: 666
 Address 2:
 Attention:
 City: VISA
 State: CA

No Stock

Item Number	OEM Vendor #	OEM Division	Description	Package Qty	Qty On Hand	Qty Committed	AFS	On Stock Order	On Stock Order
19200E0030	850		IGNITER ASSY CERAMIC						
1	0.0	0.0	0.0	0.0					

Company	Location	AFS	Primary Bn	On Stock Order	QOH	QOO	Qty Committed	Qty Committed on
> RIMSS TRA...	RIMSS TRA...	0.0000	DESP 12	0.0000	0.0000	0.0000	0.0000	0.0000

Qty: 1.0000 Sell Sell AFS/QO Remaining Back Order Drop Ship Cancel

Associated Items

Assoc. Type	Price Book	Part Number	OEM Vendor	OEM Division	Description	Quantity R...	QOH	AFS	Bi
-------------	------------	-------------	------------	--------------	-------------	---------------	-----	-----	----

old Status SO# Drop Ship Weight Extended Weight Item Serial Number

000	Open	0	0.0	0.25	0.25				
-----	------	---	-----	------	------	--	--	--	--

Available Items and Drop Ships

	Taxable	Non-Tax.	Total	Taxable	Non-Tax.	Total
Sub Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Tax	\$0.00		\$0.00	\$0.00		\$0.00
Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Tax Group 3-FARM TAX BEVAR CO... Rate 2.500 % SubTotal

Customer Deposit

Original Deposit	\$0.00
Deposit Applied	\$0.00
Unused Deposit	\$0.00

Create Deposit Return Deposit

English (United States) Client Desktop User: SuperUser (RIMSS\carl) Role: Administrator Workstation: CARL-LAPTOP Server: V3TRADESHOW Database: WinNetStarApp

When attempting to sell more of an item than you have Available for Sale, the system will bring up the No Stock pop-up window. From here you can select to Sell, Back Order or Drop Ship.

Item Number	OEM #	OEM Division	Description
19200E0030	850		IGNITER ASSY CERAMIC

Qty on Hand	0.0	Qty Committed	0.0	AFS	0.0	On Stock Order	0.0
-------------	-----	---------------	-----	-----	-----	----------------	-----

Contact	THOMPSON, DAVID	Phone	(338) 020-1462	Memo	
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Shipping Method:

OK Cancel

Selecting the Back Order option will now display the Back Order pop-up window. You can add additional information for the Back Order. Memo and Shipping Method will help identify what type of ordering is required for this part.

Back Order

Item Number	OEM #	OEM Division	Description
19200E0030	850		IGNITER ASSY CERAMIC

Qty on Hand 0.0 Qty Committed 0.0 AFS 0.0 On Stock Order 0.0

Contact THOMPSON, DAVID Phone (338) 020-1462 Memo

Shipping Method

- Name3
- FEDEX Overnight
- UPS GROUND
- UPS 3RD DAY
- UPS 2ND DAY
- UPS NEXT DAY
- TRUCK FREIGHT LTL

OK Cancel

Using the Memo or Shipping Method will help the user create an order based on certain criteria.

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RIMSS WinNetStar New Sales Order

File Save Save and New Save and Close Print Credit Cards Capture Signature Show Open Documents

General Attachments Print History Wholegoods Document Register Document Register Detail Order Status Report Customer Master

Document Type: Sales Order Document #: 0 Invoice #: 0 Document Date: 2/6/2015
 Status: Open Customer PO#: Salesman: MICHAEL S... CC Auth. #:
 Memo:

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address Shipping Information

Name: PACIFIC FARMING CO Ship To: Shipping Method:
 Address 1: 2710 TREBLE CREEK Shipment Date: 2/6/2015
 Address 2: Address 1: 66625 LERDO HWY.
 Attention: Address 2:
 City: SAN ANTONIO Attention:
 State: TX Zip Code: 78258 City: VISALIA
 Primary Contact: THOMPSON, DAVID (338) 020-1462 State: CA Zip Code: 93229

Show Customer Information (F9)

Item Number (Ctrl-N): F2-Find Customer F3-Add Misc. Charges F4-Item Search F5-Apply Core Credits F10-Apply Discount

Drag a column header here to group by that column:

A...	Type	Associations	Item Number	Description	Bin	Quantity	Replacement Cost	Price	List Price	Subtotal	Discount	Total	Tax Group	Back Order	Drop Ship	Quantity Sold	Status	SG #	Drop Ship	Weight	Extended Weight	Item Serial Number
>	Item		29200E030-850	IGNITER ASSY CER...	DISP 12	0.0000	\$67.41	\$107.47	\$107.47	\$0.00	0.00 %	\$0.00	3-FARM TAX BEVAR...	0.00	<input type="checkbox"/>	0.0000	Open	0	0.0	0.25	0.00	

	Available Items and Drop Ships			Back Orders			Total		
	Taxable	Non-Tax.	Total	Taxable	Non-Tax.	Total	Taxable	Non-Tax.	Total
Sub Total	\$0.00	\$0.00	\$0.00	\$107.47	\$0.00	\$107.47	\$107.47	\$0.00	\$107.47
Tax	\$0.00	\$0.00	\$0.00	\$2.69	\$2.69	\$2.69	\$2.69	\$2.69	\$2.69
Total	\$0.00	\$0.00	\$0.00	\$110.16	\$0.00	\$110.16	\$110.16	\$0.00	\$110.16

Tax Group: 3-FARM TAX BEVAR CO... Rate: 2.500 % SubTotal

Customer Deposit

Original Deposit	\$0.00
Deposit Applied	\$0.00
Unused Deposit	\$0.00

Create Deposit Return Deposit

English (United States) Client Desktop User: SuperUser (RIMSS\cart) Role: Administrator Workstation: CARL-LAPTOP Server: V3TRADESHOW Database: WinNetStarApp

If you require a deposit on ordered items click on the Create Deposit button.

Once a Back Order quantity has been placed onto the Sales Order, the Back Order field will increase by that amount. Also, the subtotal button will update the dollar amount under the Back Orders totals.

Invoice #	117080
Date	2/6/2015
Time	17:25

PO #:	12345
Document #:	76330
Due Date:	3/8/2015

Salesman:	MICHAEL SIMMONS
Ship Via:	
Terms:	PAID
Source:	

PACIFIC FARMING CO		
2710 TREBLE CREEK		
SAN ANTONIO	TX	78258
Contact	THOMPSON, DAVID (338) 020-1462	

Invoice

Ship To:		

Item Number	Qty	List	Bin Location	Price	Amount	Disc	Subtotal	Sales Tax	Extended Amount	Back Order	Drop Ship
Sales Order Deposit											
Sales Order 76329	1.00	\$0.00		\$100.00	\$100.00	0.00%	\$100.00	\$0.00	\$100.00	0.0000	

When collecting a Deposit, an Invoice Settlement window will appear allowing you to collect the deposit and create an invoice (receipt) for the customer. The customer's receipt will reference the original Sales Order.

FARM TAXABLE		\$0.00	\$0.00							
Cash	Check	Check #	CC	CC Type	On Acct.	Mfg Credit	CIT	Deposit	Other	
\$100.00	\$0.00		\$0.00		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

THANK YOU FOR YOUR BUSINESS!

CONDITIONAL SALES AGREEMENT: TITLE TO ALL ABOVE ENUMERATED PROPERTY SHALL REMAIN WHOLLY IN RIMSS TRACTOR & EQUIPMENT UNTIL FULLY PAID FOR AND VENDEE SHALL SURRENDER SAME ON DEMAND IF IN DEFAULT ON PAYMENTS. IT IS ALSO AGREED THAT, IF COLLECTION IS MADE BY SUIT OR OTHERWISE, I/WE AGREE TO PAY FINANCE CHARGE OF 1 1/2% PER MONTH WHICH IS AN ANNUAL RATE OF 18% AFTER 30 DAYS, ALSO COLLECTION COSTS, INCLUDING ATTORNEY'S FEES AS MAY BE ADJUDGED BY COURT, AND WAIVE ALL RIGHTS TO ANY CLAIMS, EXEMPTED UNDER STATE LAWS, AND WILL NOT REMOVE PROPERTY WITHOU WRITTEN CONSENT OF RIMSS TRACTOR & EQUIPMENT FROM ORIGINAL PLACE OF DELIVERY.

Summary of Charges	
\$0.00	Taxable
\$100.00	Non-Taxable
\$100.00	Subtotal
\$0.00	Sales Tax
\$100.00	Total
\$100.00	Amount Tendered
\$0.00	Change Due

RIMSS WinNetStar v7.0.0.1433 Enterprise:The Enterprise Company:RIMSS TRACTOR AND EQUIPMENT (2) Location:RIMSS - SAN ANTONIO (3)

File View Company Customer CRM Suppliers Employees Payroll Banking Fixed Assets Inventory Service Wholegoods Lease Rental Reports Web Links Windows Scheduling Help

RIMSS WinNetStar Back Orders

Create Suggested Order Clear Suggested Order Save Save and Close Print Create and Save PO's Approve and Save PO's Delete All Highlighted Backorders Import From Picklist

Suggested Order Order Summary

Drag a column header here to group by that column

Hos Asso...	As...	Type	Location	Supplier	OEM	Item Number	Description	Customer	Bin	Shipping Method	Memo	Document Type	Document Number	Core	Sug. Qty	Ord. Qty	Cost	Total Cost	Stock Class	AFS	Qty Committed
		BackOrder	RIMSS T...	CNH	198	A146696	FILTER, ENGINE OIL	BTV CROWN BITE...			HOLD FOR PICK-UP	Sales Order	76323		4.0000	4.0000	\$5.85	\$23.40	6 New Parts	0.0000	0.000
		BackOrder	RIMSS T...	KUBOTA TRACTOR CORPORATION	620	12581-45300	VALVE, SOLENOID ASSY	BTV CROWN BITE...		UPS 3RD...	HOLD FOR PICK-UP	Sales Order	76323		2.0000	2.0000	\$43.88	\$87.76	9 Non-Stoc...	0.0000	0.000
		BackOrder	RIMSS T...	HINO MOTOR SALES, U.S.A., INC	850	19200E0030	IGNITER ASSY CERAMIC	PACIFIC FARMING...	DISP 12	UPS GRO...		Sales Order	76329		1.0000	1.0000	\$67.41	\$67.41	6 New Parts	0.0000	0.000

3

3

SUM=\$178.57

English (United States) Client Desktop User: SuperUser (RIMSS\carl) Role: Administrator Workstation: CARL-LAPTOP Server: V3TRADESHOW Database: WinNetStarApp

Customer Orders will accumulate throughout the day in this fashion until it is time to place the order. When you are ready to place your order you will access the system's Suggested Back Orders by using the shortcut keystroke option, CTRL – B, or by navigating to Inventory > Utilities > Suggested Back Orders. This process will automatically show all Customer Back Orders.

The Suggested Stock Order will automatically create your Purchase Order and you can then access the PO to review and transmission by navigating to Suppliers > Find > Purchase Order.

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RIMSS WinNetStar New IR, BI

Save Save and Close Save and New Save and Print Bin Labels Scan Receipt Void Export Restore Layout Layouts Print Receiving Report Save Attachments

General Attachments Related Orders

PO #: 696 Doc. #: 0 Doc. Type: Item Receipt Document Date: 2/6/2015

Name: HENG MOTOR SALES, U.S.A., INC Print Terms: Net 30 Due Date: 3/9/2015 Supplier Driv. Date: 2/6/2015

Address 1: 41180 BRIDGE STREET

Address 2:

City: NOVI Supplier Ref. Status:

State: MI Zip Code: 48375

Memo:

Type	Number	Description	Primary Bin	Order Type	Reference	Memo	Rec'ed Qty	Needed Qty	Alloc. Qty	Qty	Unit Cost	Total	PO #	Source Doc Number	Source Doc Type	Source Salesman	Inactive Item	Last Modified By	Last Mod
Item	19200E0030-850	IGNITER ASSY CERAMIC	DISP 12	Customer Order	PACIFIC FARMING CO		1.0	1.0	.0	1.0	\$67.4100	\$67.41	6963	76329	POS Sales Order		<input type="checkbox"/>	SuperUser	2/6/2015

1 1.00 0.00 1.00 Total = \$67.41

English (United States) Client Desktop User: SuperUser (RIMSS\carl) Role: Administrator Workstation: CARL-LAPTOP Server: V3TRADESHOW Database: WinNetStarApp

When the items are received, the user will input the PO number in the top left field of the Item Receipt and the receiving document will automatically populate with all of the information from the PO including the Customer Name, any memo you created at the time you placed the back order on the Sales Order, the originating document number and type and the Salesman from that originating document.

Once you have saved the item receipt, you can click on the menu item "Print Receiving Report" to print a separate page for each customer order that will facilitate the process of getting the items to the appropriate department / salesman.

There is also a separate tab on this document titled "Related Orders" where you can print copies of the original Sales Orders or Repair Orders that generated the customer order.

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RIMSS WinNetStar POS Sales Order List POS Document - 76329

File Save Save and New Save and Close Print Convert to Invoice Credit Cards Capture Signature Show Open Documents

General Attachments Print History Wholegoods Document Register Document Register Detail Order Status Report Customer Master

Document Type: Sales Order Document #: 76329 Invoice #: 0 Document Date: 2/6/2015
 Status: Open Customer PO#: 12345 Salesman: MICHAEL S... CC Auth. #:
 Memo:

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address Shipping Information

Name: PACIFIC FARMING CO
 Address 1: 2710 TREBLE CREEK
 Address 2:
 Attention:
 City: SAN ANTONIO
 State: TX Zip Code: 78258
 Primary Contact: THOMPSON, DAVID (338) 020-1462

Ship To: Shipping Method: Shipment Date: 2/6/2015
 Address 1:
 Address 2:
 Attention:
 City:
 State: Zip Code:

Show Customer Information (F9)

Item Number (Ctrl-N): F2-Find Customer F3-Add Misc. Charges F4-Item Search F5-Apply Core Credits F10-Apply Discount

Drag a column header here to group by that column:

A...	Type	Associations	Item Number	Description	Bin	Quantity	Replacement Cost	Price	List Price	Subtotal	Discount	Total	Tax Group	Back Order	Drop Ship	Quantity sold	Status	SO #	Drop Ship	Weight	Extended Weight	Item Serial Number
>	Item		29200E030-850	IGNITER ASSY CER...	DISP 12	1.0000	\$67.41	\$107.47	\$107.47	\$107.47	0.00 %	\$107.47	3-FARM TAX BEVAR...	0.0	<input type="checkbox"/>	0.0000	Open	0	0.0	0.25	0.25	

	Available Items and Drop Ships			Back Orders			Total		
	Taxable	Non-Tax.	Total	Taxable	Non-Tax.	Total	Taxable	Non-Tax.	Total
Sub Total	\$0.00	\$0.00	\$0.00	\$107.47	\$0.00	\$107.47	\$107.47	\$0.00	\$107.47
Tax	\$0.00	\$0.00	\$0.00	\$2.69	\$0.00	\$2.69	\$2.69	\$0.00	\$2.69
Total	\$0.00	\$0.00	\$0.00	\$110.16	\$0.00	\$110.16	\$110.16	\$0.00	\$110.16

Tax Group: 3-FARM TAX BEVAR CO... Rate: 2.500 % SubTotal

Customer Deposit	
Original Deposit	\$100.00
Deposit Applied	\$0.00
Unused Deposit	\$100.00

Create Deposit Return Deposit

English (United States) Client Desktop User: SuperUser (RIMSS\carl) Role: Administrator Workstation: CARL-LAPTOP Server: V3TRADESHOW Database: WinNetStarApp

Upon receipt, the system will update the original Sales Order by moving the Back Order quantity to the Sale Quantity. Also, the Sales Order shows the Unused Deposit to be used in the settlement of this transaction.

Settlement

	Taxable	Non-Tax.	Total
SubTotal	\$107.47	\$0.00	\$107.47
Tax	\$2.69		\$2.69
Total	\$110.16	\$0.00	\$110.16

Cash	\$10.16	Check #	
Check	\$0.00	CC Type	
Credit Card	\$0.00	Reference	
Customer Account	\$0.00	Reference	
Contract in Transit	\$0.00		
Sales Order Deposit	\$100.00		
Other	\$0.00		

Total	\$110.16
Change Due	\$0.00

F8 - Save and Print Receipt

F9 - Cancel

F10 - Capture Electronic Signature

In our example, since we took a deposit for a partial amount of the Sales Order and the customer paid the remainder in Cash.. The user can quickly convert this Sales Order to an Invoice and click on Save and Print Receipt to finalize the transaction.