



2015 WinNetStar Training Classes

Suggested Stock Order

Software Development-M3
RIMSS Business Systems Technology

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WinNetStar includes a comprehensive set of features to assist the user in managing inventory levels. The process is based on best reorder points (BRP) and best stocking levels (BSL) expressed in days supply combined with a methodology for determining at what level of sales activity you wish to stock a particular inventory item. These two concepts, when used together correctly, will help to ensure that your inventory levels remain adequate to fill demand while ensuring that you do not tie up excess funds in your inventory. The criteria for BRP, BSL and Stock Class are established in the Stocking Source and generally assigned to large groups of parts – for instance, all captive parts from one manufacturer might have the same Stocking Source with the same BRP and BSL expressed in a number of days supply. The Stock Class is also determined by criteria set up in the Stocking Source where you will define the number of months with a sale within a given time frame for the inventory item to be considered a stocked item – for instance, if an item has sales during 4 months out of the past 12 you might consider it an item to keep on hand. The system then uses sales history to upgrade or downgrade the Stock Class of inventory items to help identify new items to stock or items that no longer justify stocking. Sales history is also used by the system’s Suggested Stock Order to convert the BRP and BSL from days supply to an actual quantity needed on hand to fill demand. The following screen shots illustrate the set up and use of the systems Suggested Stock Order.

Stocking Source Set Up



Stocking Source criteria are location specific and must be maintained for each location separately.

RIMSS WinNetStar **Stocking Source List**

Add New Refresh Print Restore Layout

Drag a column header here to group by that column

Inactive	Default	Number	Description
False	False	064	C=Lx.80 -- Conversion: BSL 180 BRP 60 New History 0 New Review 0
False	False	065	C+30% -- Conversion: BSL 90 BRP 30 New History 0 New Review 0
False	False	066	C+25% -- Conversion: BSL 90 BRP 30 New History 0 New Review 0
False	False	067	+20% -- Conversion: BSL 0 BRP 0 New History 0 New Review 0
False	False	068	KUBOTA W/G -- Conversion: BSL 90 BRP 60 New History 3 New Review 12
False	False	069	80% FROM A & I -- Conversion: BSL 90 BRP 30 New History 0 New Review 0
False	False	070	WHOLE GOODS -- Conversion: BSL 45 BRP 30 New History 2 New Review 12
False	False	071	LANDPRIDE -- Conversion: BSL 90 BRP 60 New History 2 New Review 12
False	False	075	NORTHWEST TILLERS -- Conversion: BSL 90 BRP 30 New History 0 New Review 0
False	False	080	TISCO -- Conversion: BSL 180 BRP 90 New History 2 New Review 12
False	False	081	A & I PRODUCTS -- Conversion: BSL 90 BRP 60 New History 2 New Review 12
False	False	082	BARE-CO -- Conversion: BSL 90 BRP 30 New History 2 New Review 12
False	False	088	GILLISON'S -- Conversion: BSL 90 BRP 60 New History 3 New Review 18
False	False	098	FUEL -- Conversion: BSL 45 BRP 30 New History 2 New Review 12
False	False	099	MISC. -- Conversion: BSL 45 BRP 30 New History 2 New Review 12
False	False	100	USED PARTS/OUTSIDE PUR. -- Conversion: BSL 45 BRP 30 New History 2 New Review 12
False	False	101	SPECIAL SALE PARTS -- Conversion: BSL 90 BRP 30 New History 2 New Review 12
False	False	231	LEAMAN EQUIPMENT -- Conversion: BSL 120 BRP 60 New History 2 New Review 12
False	False	232	JOSEPH IND. -- Conversion: BSL 135 BRP 68 New History 2 New Review 18
False	False	261	KINGS EQUIPMENT CO. -- Conversion: BSL 90 BRP 60 New History 3 New Review 12
False	False	262	KINGS EQUIPMENT CO. -- Conversion: BSL 90 BRP 60 New History 3 New Review 12
False	False	KUBOTA	KUBOTA - FAST MOVING PARTS
False	False	KUB HRDWRE	KUBOTA HARDWARE
False	False	KUB FILTER	KUBOTA FILTERS
False	False	KUB BELTS	KUBOTA BELTS
False	False	KUB OIL	KUBOTA OIL
False	False	KUB BATTs	KUBOTA BATTERIES
False	False	BUSH HOG	BUSH HOG
False	False	MISC OILS	GAS/OIL/GREASE
False	False	FLORY	FLORY
False	False	BLU	BLUE BIRD

[Inactive] = 'False' Edit Filter

Double click on a line to open the Stocking Source for editing or click on the Add New menu option to add a new source. See next page.

RIMSS WinNetStar Stocking Source List Stocking Source - KUBOTA

Save Save and Close Save and New

Default Stocking Source # KUBOTA Description KUBOTA - FAST MOVING PARTS

Inactive

Stocking Level Criteria

Best Stocking Level (Num of Days Supply) 10 Days Represents target maximum amount of inventory on hand expressed in # of days supply

Best Reorder Point (Num of Days Supply) 5 Days Represents target minimum amount of inventory on hand expressed in # of days supply

Num of Months History 12 Months Used to convert days supply into quantities in the Item Master

Stocking Class Criteria for "Fast Moving Item"

Existing Items (Historical Review)		New Items (Future Review)	
Num of Months to Review	12 Months	Num of Months to Review	12 Months
Num of Months with a Sale	3 Months	Num of Months with a Sale	3 Months

The Stocking Source # is required and can be alpha numeric. The Description is not required. Insert a number of Days Supply for your Best Stocking Level and Best Reorder Point. The Best Stocking Level will affect your total inventory, your average investment in inventory and your inventory turnover. The higher this number is, the higher your investment in inventory will be over time and result in lower inventory turns. The Best Reorder Point will generally be your lead time (at what point you will need to order the item so that you can continue to fill demand until the next order arrives).

Stocking Class Criteria is established for existing items separately from new items. The criteria are often times the same but can be different. Existing items with a sales history already in place will be evaluated for upgrade or downgrade based on the number of historical months with a sale over the review period identified (number of months to review). Newly added inventory items, that receive an initial Stock Class 6, will be evaluated based on their creation date going forward in time. For a more detailed analysis of Stock Classes, see the Stock Class Rules help document.

Creating a Suggested Stock Order

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

- New
- Find
- Utilities
- Support Lists

- Update Inventory Catalogs
- Update Inventory Master File
- Suggest Back Orders Ctrl+B
- Suggested Stock Orders
- Merge Sales History
- Reset All Interface Programs
- AGCO
- CASE / FNH / CCN Web
- KUBOTA
- NAVISTAR International
- CLAAS
- Custom Exports
- Export National Lease Invoices

RIMSS WinNetStar
Advanced Enterprise System

To create or use an existing Stock Order, go to Inventory > Utilities > Suggested Stock Order.

Company: RIMSS TRACTOR AND EQUIPMENT (2)
Location: RIMSS - SAN ANTONIO (3)

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

RIMSS WinNetStar SSO List

Add New Refresh

Drag a column header here to group by that column

System ID	Description	Last Modified By	Last Modified Date
3	SMITH AUTO STOCK ORDER	carl	2/8/2015
4	DAILY SPECIAL ORDER PARTS	carl	2/8/2015
5	STOCK ORDER(KUBOTA)	carl	2/8/2015
6	FILTER ORDER	carl	2/8/2015
7	BLUE BIRD STOCK ORDER	carl	2/8/2015
8	FORD NEW HOLLAND	carl	2/8/2015
11	A&I PRODUCTS	carl	2/8/2015
13	TISCO	carl	2/8/2015
21	KUBOTA FILTER PRE SEASON	tommy	12/16/2014
23	TISCO PRE-SEASON	carl	2/8/2015
25	CUMMINS WEST	carl	2/8/2015
29	TISCO MONTHLY	carl	2/8/2015
30	KUBOTA OIL	tommy	2/8/2015
39	System Back Orders	SuperUser	2/6/2015

You can create and save your ordering criteria for repetitive use. Double click on a line to open for use or click on Add New to create a new Suggested Order.

RIMSS WinNetStar SSO List SSO - 5

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

Order Options Suggested Order Order Summary

Name
STOCK ORDER (KUBOTA)

Stock Class Update
Last Stock Class Update 2/8/2015
Update Now

Sales History Adjustments
 Adjust Sales History by 100.00 %
 Minimum Qty of 1 AFS for Stock Class 1
 Minimum Qty of 1 AFS for Stock Class 6
 Include Committed in Calculations
 Include Lost Sales in Calculations

Regular Stock Order
 Sales History Beginning Date January 2014
 Sales History Ending Date February 2015

Special Stock Order
 January July
 February August
 March September
 April October
 May November
 June December
 Number of Years to Include 1

- ▶ RIMSS TRACTOR AND EQUIPMENT
 - ▶ A/P Suppliers
 - ▶ Locations
 - ▶ RIMSS TRACTOR AND EQUIPMENT
 - ▶ RIMSS TRACTOR AND EQUIPMENT
 - ▶ Mfg. Promo Code
 - ▶ OEM Vendors
 - ▶ Order Types
 - ▶ Back Order
 - ▶ Drop Ship
 - ▶ Stock Order
 - ▶ Pricing Source
 - ▶ Stock Class
 - ▶ 1 Regular or Fast Moving Part (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ 1 Regular or Fast Moving Part (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ 2 2 (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ 3 3 (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ 5 Seasonal Parts (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ 5 Seasonal Parts (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ 6 New Parts (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ 6 New Parts (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ 7 Manual Order Parts (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ 7 Manual Order Parts (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ 8 Down-Graded Non-Stock Parts (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ 8 Down-Graded Non-Stock Parts (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ 9 Non-Stock Parts (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ 9 Non-Stock Parts (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ U Non-Stock Emergency Ordered Parts (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ U Non-Stock Emergency Ordered Parts (RIMSS TRACTOR AND EQUIPMENT)
 - ▶ Stacking Source
 - ▶ User Code
 - ▶ (blank)

A Regular Stock Order is used for your non-seasonal items that have a Stock Class 1.

A Special Stock Order ignores BRP and BSL and will order back up to the historical sales levels for the months selected. This type of Stock Order is generally used for Seasonal Items (Stock Class 5).

Check the box for Minimum Qty of 1 AFS for Stock Class 1 if you want to always order those items even when sales history does not support the order.

Select the options for your order on this screen then click on the Create Suggested Order menu item.

RIMSS WinNetStar SSO List SSO - 5

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

Order Options Suggested Order Order Summary

Drag a column header here to group by that column

Has Asso...	As...	Type	Location	Supplier	OEM	Item Number	Description	Customer	Bin	Shipping Method	Memo	Document Type	Document Number	Core	Sug. Qty	Ord. Qty	Cost	
<input checked="" type="checkbox"/>	D	BackOrder	RIMSS T...	KUBOTA TRACTOR CORPORATION	620	12581-45300	VALVE, SOLINOID ASSY	BTV CROWN ENTE...		UPS 3RD...	HOLD FOR PICK-UP	Sales Order	76323		\$0.00	2.0000	2.0000	\$43.8
<input checked="" type="checkbox"/>	D	Stock	RIMSS T...	KUBOTA TRACTOR CORPORATION	620	19203-73014	ASSY THERMOSTAT ***		J4						\$0.00	1.0000	1.0000	\$19.4
<input type="checkbox"/>		Stock	RIMSS T...	KUBOTA TRACTOR CORPORATION	620	77700-02482	KNIFE, MULTI-PURPOS...		DISP 14						\$0.00	12.0000	12.0000	\$6.2
<input checked="" type="checkbox"/>	D	Stock	RIMSS T...	KUBOTA TRACTOR CORPORATION	620	77700-01822	KUBOTA BLISTER CAR...		DISP 4						\$0.00	1.0000	1.0000	\$20.7
<input type="checkbox"/>		Stock	RIMSS T...	KUBOTA TRACTOR CORPORATION	620	77700-02480	PRUNERS, BYPASS		DISP 14						\$0.00	6.0000	6.0000	\$14.4
<input type="checkbox"/>		Stock	RIMSS T...	KUBOTA TRACTOR CORPORATION	620	77700-04465	GLASSES,SAFETY RECL...		DISP						\$0.00	3.0000	3.0000	\$13.2
<input type="checkbox"/>		Stock	RIMSS T...	KUBOTA TRACTOR CORPORATION	620	77700-03893	TOY,PETERBILT FLATB...								\$0.00	6.0000	6.0000	\$20.9
<input checked="" type="checkbox"/>	D	Stock	RIMSS T...	KUBOTA TRACTOR CORPORATION	620	70000-10502	GEAR OIL, 2.5 GAL, GE...		DISP 10						\$0.00	2.0000	2.0000	\$43.0
<input type="checkbox"/>		Stock	RIMSS T...	KUBOTA TRACTOR CORPORATION	620	18017	MIRROR		DISP 1						\$0.00	1.0000	1.0000	\$15.0

9

The system will open the Suggested Order tab when the calculations are complete showing you a list of items and the suggested order quantity. There are many columns available on this screen and you may customize your view using the Column Chooser feature. You can filter this list, you can delete items off of this list, and you can edit the order quantity of each item. Once you have the list displaying only those items you wish to order, you should click on the Order Summary tab which will display a list of suggested Purchase Orders.

RIMSS WinNetStar SSO List SSO - 5

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

Order Options Suggested Order Order Summary

Select All

Drag a column header here to group by that column

Is Selected	Suggested Date	A/P Supplier	Total Cost	Total Weight	Ship To	Shipping Method
<input type="checkbox"/>	2/8/2015	A & I PRODUCTS	\$293.45	N/A	RIMSS TRACTOR AND EQUIPMENT	
<input type="checkbox"/>	2/8/2015	BUSH HOG, INC.	\$220.14	N/A	RIMSS TRACTOR AND EQUIPMENT	
<input type="checkbox"/>	2/8/2015	FASTENAL	\$136.58	N/A	RIMSS TRACTOR AND EQUIPMENT	
<input type="checkbox"/>	2/8/2015	FLORY INDUSTRIES	\$852.12	N/A	RIMSS TRACTOR AND EQUIPMENT	
<input type="checkbox"/>	2/8/2015	KUBOTA TRACTOR CORPORATION	\$556.89	N/A	RIMSS TRACTOR AND EQUIPMENT	UPS 3RD DAY
<input type="checkbox"/>	2/8/2015	LAND PRIDE	\$190.40	N/A	RIMSS TRACTOR AND EQUIPMENT	
<input type="checkbox"/>	2/8/2015	MEYER WEST	\$35.70	N/A	RIMSS TRACTOR AND EQUIPMENT	
<input type="checkbox"/>	2/8/2015	QUALITY MACHINERY	\$273.84	N/A	RIMSS TRACTOR AND EQUIPMENT	
<input type="checkbox"/>	2/8/2015	RANKIN EQUIPMENT CO	\$497.45	N/A	RIMSS TRACTOR AND EQUIPMENT	
<input type="checkbox"/>	2/8/2015	REARS MFG. CO.	\$4,778.90	N/A	RIMSS TRACTOR AND EQUIPMENT	
<input type="checkbox"/>	2/8/2015	SMITH AUTO	\$194.36	N/A	RIMSS TRACTOR AND EQUIPMENT	
<input type="checkbox"/>	2/8/2015	STRATHMORE MACHINERY INC	\$2.96	N/A	RIMSS TRACTOR AND EQUIPMENT	
<input type="checkbox"/>	2/8/2015	WASCO HARDFACING	\$718.88	N/A	RIMSS TRACTOR AND EQUIPMENT	

Click in the box on the left margin for each suggested Purchase Order you wish to create and then click on the Create and Save PO's menu option. This will create a new Purchase Order for the appropriate Supplier that can be accessed via Suppliers > Find > Purchase Order. If you have PO approval authority, you can also click on the Approve and Save PO's menu option to create an approved Purchase Order. After your PO is approved, you can send it to your supplier.