



RIMSS WinNet*Star
Advanced Enterprise System

Customer Purchase Order

The Customer Purchase Order feature within WinNetStar allows a user to set up Purchase Orders by customer and track sales against those Purchase Orders. You can set a purchase order amount, a date range, and eligible document types for each Purchase Order. The system will then require the user to select a Purchase Order when making a sale to the customer and will produce various warning messages if the amount of the sale is going to exceed the total of the PO or if the document date is outside the date range of the PO. Total sales, sales orders and estimates will be tracked and are displayed in the Customer Master. The following screen shots illustrate the set up and use of this feature.

Customer Purchase Orders

| Purchase Order Number | Description | Notes | Start Date | End Date | Eligible Document Type | Purchase Order Amount | Used | Commitments | Estimates | Subtotal | Net Remaining | Net Unused | Inactive | Last Modified By | Last Modified Date |
|-----------------------|-------------------|-----------------|------------|-----------|------------------------|-----------------------|-------------|-------------|-----------|-------------|---------------|-------------|----------|------------------|--------------------|
| 987465496 | PARTS ONLY | ONLY USE FO... | 7/1/2011 | 6/30/2012 | Item | \$10,000.00 | \$9,100.00 | \$100.00 | \$0.00 | \$9,200.00 | \$800.00 | \$900.00 | False | dale | 7/29/2011 3:39 PM |
| 9876341654 | SERVICE ONLY | USE FOR SER... | 7/29/2010 | 7/29/2020 | Service | \$15,000.00 | \$5,000.00 | \$0.00 | \$0.00 | \$5,000.00 | \$10,000.00 | \$10,000.00 | False | dale | 7/29/2011 11:25 AM |
| 25426554 | ALL INVOICE TYPES | ALL INVOICE ... | 7/29/2010 | 7/29/2012 | Item, WG, Se... | \$10,000.00 | \$10,208.00 | \$0.00 | \$0.00 | \$10,208.00 | (\$208.00) | (\$208.00) | False | dale | 7/29/2011 11:22 AM |

Within the Customer Master you will find the Customer Purchase Order Tab. On this screen, you can add or edit Customer Purchase Orders and you can view the detailed documents that reference a particular Purchase Order. Yellow highlighted lines have accumulated sales that are nearing the total of the Purchase Order. Red highlighted lines have sales that have exceeded the Purchase Order total.

Purchase Order Number:

Related Documents

Drag a column header here to group by that column

| Location Name | Doc # | Invoice Number | Doc Date | Doc Type | Salesman | Total | Last Modified By | Last Modified Date |
|---------------|-------|----------------|-----------|-------------|--------------|------------|------------------|--------------------|
| Racine | 1239 | 20649 | 7/29/2011 | Invoice | DALE TEAG... | \$9,000.00 | dale | 7/29/2011 |
| Racine | 1240 | 20650 | 7/29/2011 | Invoice | DALE TEAG... | \$100.00 | dale | 7/29/2011 |
| Racine | 1241 | 0 | 7/29/2011 | Sales Order | DALE TEAG... | \$100.00 | dale | 7/29/2011 |
| Racine | 1220 | 0 | 7/29/2011 | Sales Order | DALE TEAG... | \$0.00 | dale | 7/29/2011 |
| Racine | 1223 | 0 | 7/29/2011 | Sales Order | DALE TEAG... | \$0.00 | dale | 7/29/2011 |

\$9,200.00

RIMSS.WinNetStar v7.0.0.624 Enterprise:The Enterprise Company:CSS Enterprises (222) Location:Racine (223)

File View Company CRM Suppliers Employees Banking Fixed Assets Inventory Service Wholegoods Rental Core Tracking Reports Web Links Windows Help

RIMSS WinNetStar Customer List Customer - Coast Guard (67)

Save Save and Close Save And New

General Details Financial Information Ship To Attachments User Defined Fields Account Numbers Promotional Pricing Customer Purchase Orders

Add New Refresh

Clicking on the Add New button will produce this pop up. A PO number is required. You can also give it a description and add notes. The Start Date and End Date are required as well as a dollar amount. The Eligible Document Types drop down will allow you to select the documents where this PO will be used. The Tolerance is not required but putting a percentage in this field (like 90%) will alert the user that this PO is nearing its total by highlighting the line yellow when it reaches this percentage. Duplicate PO numbers are allowed for those instances where one customer will issue one PO for 10,000 with 4,000 approved for Inventory Items and 6,000 approved for Service work. You can set the same PO number up with its respective amount and restrict it to the appropriate document type.

Customer Purchase Order

PO #

Description

Notes

Start Date 7/29/2011

End Date 7/29/2011

Amount 0.00

Eligible Document Types Estimate, Sales Order, Invoice (Item), WG Esti...

Tolerance 0.00 %

Inactive

Last Modified By dale

Last Modified Date 7/29/2011 3:44:27 PM

OK Cancel

| End Date | Eligible Document Type | Purchase Order Amount | Used | Commitments | Estimates | Subtotal | Net Remaining | Net Unused | Inactive | Last Modified By | Last Modified Date |
|-----------|------------------------|-----------------------|------|-------------|-----------|----------|---------------|-------------|----------|------------------|--------------------|
| 7/30/2012 | | | | | | | \$800.00 | \$900.00 | False | dale | 7/29/2011 3:39 PM |
| 7/29/2020 | | | | | | | \$10,000.00 | \$10,000.00 | False | dale | 7/29/2011 11:25 AM |
| 7/29/2012 | | | | | | | (\$208.00) | (\$208.00) | False | dale | 7/29/2011 11:22 AM |
| 7/29/2011 | | | | | | | \$0.00 | \$0.00 | False | dale | 7/29/2011 3:44 PM |

\$9,200.00

User: Workstation: DALE-PC Server: V3Test Database: WinNetStarApp Key Stroke Entry

3:53 PM

Customer Purchase Orders

| Purchase Order Number | Description | Notes | Start Date | End Date | Eligible Document Type | Purchase Order Amount | Used | Commitments | Estimates | Subtotal | Net Remaining | Net Unused | Inactive | Last Modified By | Last Modified Date |
|-----------------------|-------------------|-----------------|------------|-----------|------------------------|-----------------------|-------------|-------------|-----------|-------------|---------------|-------------|----------|------------------|--------------------|
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| 9876341654 | SERVICE ONLY | USE FOR SER... | 7/29/2010 | 7/29/2020 | Service | \$15,000.00 | \$5,000.00 | \$0.00 | \$0.00 | \$5,000.00 | \$10,000.00 | \$10,000.00 | False | dale | 7/29/2011 11:25 AM |
| 25426554 | ALL INVOICE TYPES | ALL INVOICE ... | 7/29/2010 | 7/29/2012 | Item, WG, Se... | \$10,000.00 | \$10,208.00 | \$0.00 | \$0.00 | \$10,208.00 | (\$208.00) | (\$208.00) | False | dale | 7/29/2011 11:22 AM |

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\$9,200.00

Clicking on a line in the top section of this form will populate the Purchase Order Number field in the bottom half of the form. Selecting Fetch will then produce a detailed list of all the documents that reference the selected PO.

Please note that if you are using estimates, those estimates will remain open and against the PO until voided. Converting the estimate to a sales order or invoice will not do this. They must be voided if you do not want them to count against you PO amount.

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\$9,200.00

See the definition of amounts in the following columns:

Used - will display the total of all invoices that have been settled against the PO.

Commitments - will display the total of all sales order/repair orders against this PO.

Estimates - will display the total of all estimates against this PO.

Subtotal – will display the sum of the Used, Commitments and Estimates amounts.

Net Remaining – will display the sum of the total PO less the Subtotal

Net Unused – will display the sum of the total PO less the amount Used

User: dale Role: Administrator Workstation: DALE-PC Server: V3Test Database: WinNetStarApp Key Stroke Entry

Inbox - Microsoft O... WinNetStar Internal ... RIMSS.WinNetStar v... Customer Purchase ... 3:59 PM

Document Type: Sales Order Document #: 0 Invoice #: 0
 Status: Open Customer PO#: Salesman: DALE
 Memo:

Customer Name and Address Shipping Information

Name: Coast Guard
 Address 1: 9855 Jones
 Address 2: Suite 100
 City: Dallas
 State: TX
 Primary Contact: Able, Tom

Show Customer Information

Item Number (Ctrl-N):

| A... | Type | Item Num |
|-------|-------|----------|
| P... | | |
| Misc. | Labor | |

At point of sale, you can click on the blue square in the Customer PO# field to produce this pop up. Double click a line to select that PO. For customers that do not have PO's set up in their master in this way, you will still be able to type a PO number directly in this field.

| Purchase Order Number | Description | Notes | Start Date | End Date | Eligible Document Type | Purchase Order Amount | Used | Commitments | Estimates | Subtotal | Net Remaining | Net Unused | Inactive | Last Modified |
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| | 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 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Tax | \$0.00 | | \$0.00 | \$0.00 | | \$0.00 | \$0.00 | | \$0.00 |
| Total | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |

Tax Group: Racine Rate: 12.000 % SubTotal

| Customer Deposit | |
|------------------|--------|
| Original Deposit | \$0.00 |
| Deposit Applied | \$0.00 |
| Unused Deposit | \$0.00 |

Create Deposit Return Deposit