



RIMSS WinNetStar
Advanced Enterprise System

Inventory Item Quick Add

WinNetStar allows the user to set up default values for Pricing, Stocking and Accounting options related to Inventory Items. These default values are assigned to the OEM Vendor for each location. The following screen shots illustrate how to set up these default values and how those values are used with the Inventory Item Quick Add feature. The screen shots illustrate an example of using the Quick Add feature on a Sales Order, however, this feature is available on the following documents:

Estimate

Sales Order

Invoice

WG Estimate

WG Sales Order

WG Invoice

Repair Estimate

Repair Order

Purchase Order

Item Receipt / Bill

Inventory Adjustment

RIMSS.WinNetStar v7.0.0.548 Enterprise:The Enterprise Company:CSS Enterprises (222) Location:Racine (223)

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

Easy Navigator

- RIMSS W
 - Company Home
 - New
 - Find
 - Beginning Balances
 - New Company
 - Company Preferences
 - Modify Company
 - Switch Company/Location Ctrl+Z
 - Location Profile
 - Location Support Lists
 - Credit Card Sales
 - Mfg. Credit Programs
 - Stock Class
 - Bin Locations
 - Accounting Sources
 - Pricing Sources
 - Promotional Pricing
 - Stocking Sources
 - Miscellaneous Charges
 - Price Book Defaults
 - Company Support Lists
 - Enterprise Support Lists
 - Sales Tax

To set up your Location Price Book Defaults, navigate to Company>Location Support Lists>Price Book Defaults

RIMSS WinNetStar
Financial Enterprise System

Easy Navigator

RIMSS WinNetStar Price Book Defaults

Refresh Print

Drag a column header here to group by that column

OEM Vendor Number	OEM Vendor Name	OEM Vendor Inactive	Price Book	Last Modified By	Last Modified Date	Accounting Source	Pricing Source	Stocking Source	Stock Class
		false							
074	Dana New/Reman Clutches	False	NAV						
082	Fleetrite Premium Bearings	False	NAV						
083	Fleetrite Batteries	False	NAV						
100				dale	4/26/2011 3:16 PM	NAV - Loc...	NAV - Loc...	NAV - Loc...	6 - New Parts
102									
103									
104									
107				dale	4/28/2011 9:11 AM	NAV - Loc...	NAV - Loc...	NAV - Loc...	6 - New Parts
108	Fontaine Fifth Wheels	False	NAV						
110	Cabmate Link/Cats Eye	False	NAV						
111									
112									
113									
114	Peerless Chains	False	NAV	dale	4/26/2011 3:20 PM	NAV 114 -	NAV 114 -	NAV 114 -	6 - New Parts
116	Fleetrite Brake Linings	False	NAV						
117	Iowa Glass Truck Glass Med & HD	False	NAV						
118	Puradyne Bypass OilPur System	False	NAV						
119	Fuller Quick Ship Trans Parts	False	NAV						
122	ZeroStart Cold Weather Start Prod	False	NAV						
123	Donaldson Co Mufflers & Exhaust	False	NAV						
125	Gunite Corp Fleet Line Products	False	NAV						
126	Beach Mfg. Mirrors	False	NAV						

On the Price Book Defaults list, you can filter the OEM Vendor Inactive column to show only active OEM Vendors by typing false in the filter row for that column.

Double click a line to open the following pop up window for editing.

[OEM Vendor Inactive] Like 'false%' Edit Filter

Easy Navigator

RIMSS WinNetStar Price Book Defaults

Refresh Print

Drag a column header here to group by that column

OEM Vendor Number	OEM Vendor Name	OEM Vendor Inactive	Price Book	Last Modified By	Last Modified Date	Accounting Source	Pricing Source	Stocking Source	Stock Class
		false							
074	Dana New/Reman Clutches								
082	Fleetrite Premium Bearings								
083	Fleetrite Batteries								
100	International (Navistar)								
102	*Flex-a-lite Fans, Heavy Duty								
103	Fleetrite MBI Center Bearings								
104	Gold Eagle Chemicals								
107	Holland Hitch Fifth Wheels								
108	Fontaine Fifth Wheels								
110	Cabmate Link/Cats Eye								
111	BSP Battery Terminals & Relat								
112	Synflex Coiled Air Hose & Trk								
113	Leece-Neville Starters & Alter								
114	Peerless Chains								
116	Fleetrite Brake Linings								
117	Iowa Glass Truck Glass Med &								
118	Puradyne Bypass OilPur System								
119	Fuller Quick Ship Trans Parts	False	NAV						
122	ZeroStart Cold Weather Start Prod	False	NAV						
123	Donaldson Co Mufflers & Exhaust	False	NAV						
125	Gunite Corp Fleet Line Products	False	NAV						
126	Beach Mfg. Mirrors	False	NAV						

Price Book Default Form

Price Book Code: NAV

Price Book Description: International

Supplier: International

Inactive:

CNH Vendor Direct Part:

OEM Vendor Number: 100

OEM Vendor Name: International (Navistar)

Default Pricing Source: NAV - Location Default

Default Accounting Source: NAV - Location Default

Default Stocking Source: NAV - Location Default

Stocking Class: 6 - New Parts

OK

Cancel

Use the drop down boxes to set these 4 default values for each OEM Vendor.

The Quick Add Inventory Item pop up is illustrated below. It will display the default values that you set up for the selected Vendor in the Price Book Defaults process. You can also change those values on this pop up if you wish. If you change the Pricing Source or # of Pricing Units Included in Cost, and want the system to recalculate the pricing using those new values, click on the Recalculate button. You can also change the Tax Status of the Item, or set a bin location. (If you buy the Item in quantities of 12 but want to sell in quantities of 1, the # of Pricing Units Included in Cost should be 12). If you have set up your Price Book Defaults correctly, you will generally just need to set a bin location and click OK since most Items are going to be taxable and the # of Pricing Units in Cost will generally be 1. Clicking OK will create the Item Master record and add the item to your document.

Quick Add Inventory Item

Price Book: NAV Item #: **KEN35429** OEM Vendor #: 155
 Description: TIRE BEA
 Pricing Source: NAV - Location Default
 Accounting Source: NAV - Location Default
 Stocking Source: NAV - Location Default
 Stock Class: 6 - New Parts
 Tax Status: Taxable
 # of Pricing Units Inc. in Cost: 1.00

Bin Locations

Code	Description	Primary
*

Raw Mfg. Values					U/M Converted Mfg. Values			Store Values			Store Values		
Produc...	W/O C...	P-Core	Total	S-Core	W/O C...	P-Core	Total	W/O C...	P-Core	Total	Margin	Mark Up	COS
Cost	\$79.97	\$0.00	\$79.97	\$0.00	\$79.97	\$0.00	\$79.97	\$79.97	\$0.00	\$79.97	0.00 %	0.00 %	100.00 %
List	\$99.96	\$0.00	\$99.96	\$0.00	\$99.96	\$0.00	\$99.96	\$119.96	\$0.00	\$119.96	33.33 %	50.00 %	66.67 %
Trade	\$96.35	\$0.00	\$96.35	\$0.00	\$96.35	\$0.00	\$96.35	\$91.97	\$0.00	\$91.97	13.04 %	15.00 %	86.96 %
Special 1	\$95.20	\$0.00	\$95.20	\$0.00	\$95.20	\$0.00	\$95.20	\$91.97	\$0.00	\$91.97	13.04 %	15.00 %	86.96 %
Special 2	\$94.08	\$0.00	\$94.08	\$0.00	\$94.08	\$0.00	\$94.08	\$87.97	\$0.00	\$87.97	9.09 %	10.00 %	90.91 %
Special 3	\$95.20	\$0.00	\$95.20	\$0.00	\$95.20	\$0.00	\$95.20	\$91.97	\$0.00	\$91.97	13.04 %	15.00 %	86.96 %

Save Save and Close Save and New Print Void Print Pick List Import Picklist Capture Signature

General Attachments

Document Type: Sales Order Document #: Document Date: 4/28/2014

No Stock

Item Number	OEM #	OEM Division	Description
IKEN35429	155	NAVISTR	TIRE BEA
Qty on Hand 0.0	Qty Committed 0.0	AFS 0.0	On Stock Order 0.0
Qty 4,0000	Sell	Back Order	Drop Ship
			Cancel

Show Customer Information (F9)

Item Number (Ctrl-N):

F2-Find Customer

F3-Add Misc. Charges

F4-Item Search

F10-Apply Discount

A... P...	Type	Item Number	Description	Bin	Quantity	List Price	Price	Amount	Discount	Subtotal	Total	Tax Group
> (+)	Item	IKEN35429-155-NAVI...	TIRE BEA		1.0	\$119.96	\$119.96	\$119.96	0.00 %	\$119.96	\$119.96	Racine

In this case, the Inventory Item was automatically added to a Sales Order. Because the AFS quantity is zero the system will invoke the No Stock pop up to allow you to set the item up on Back Order or Drop Ship.

	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

Customer Deposit

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

Tax Group Racine Rate 11.000 % SubTotal

Create Deposit Return Deposit