



Drop Ship Procedures

How to Drop Ship Parts to Customer

Software Development
RIMSS Business Systems Technology

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There are two available methods to drop ship parts to your customers.

Method 1

Ship part(s) to customer from your available parts inventory.

Method 2

Drop Ship parts(s) to customer from your Supplier. Using this option, your Supplier will ship the part(s) directly to the customer and the customer will pay you for the part(s).

Method 1 – Shipping part(s) to customer from your available inventory

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

Document Type: Sales Order Document #: 212 Invoice #: 0 Document Date: 5/26/2017 Project #: ...
 Status: Open Customer PO#: ... Salesman: Lee Chesnut CC Auth. #: ... Sub Project #: ...
 Internal Memo: ... Printed Memo: ...

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address
 Name: Buddy Chesnut
 Address 1: 1234 State Street
 Address 2:
 Attention:
 City: McKinney
 State: TX Zip Code: 75071
 Primary Contact:

Shipping Information
 Ship To Shipping Method: USPS Ground
 Shipment Date: 5/26/2017
 Address 1:
 Address 2:
 Attention:
 City:
 State:
 Zip Code:

Address Lookup
 Drag a column header here to group by that column

Contact Mechanism...	Contact Mechanism...	Atten...	Address1	Address2	City	State	PostalCode	Country	Primary
Address	Bill To		1234 State Street		McKinney	TX	75071	United States	False
Address	Business		1234 State Street		McKinney	TX	75071	United States	False
ShipTo	Ship To		2710 Treble Creek	Suite 200	San Antonio	TX	78258	United Stat...	False

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

Ass... Part...	Associations	Type	Item Number	Description	Bin	Quantity	List Price	Price	Amount	Subtotal	Discount	Sales Tax	Total	Item Serial Number	Tax Group	AFS	Back Order	Drop Ship	Quantity Sold	Status
> ⊕	U	Item	0084123210-219	CLEVIS PIN		1.0000	\$2.36	\$2.360	\$2.360	\$2.36	0.00 %	\$0.16	\$2.52	19-125	TAXABLE	11.0000	0.0		0.0000	Open

- #1 Select your Shipping Method from the drop down
- #2 Select the Shipping Address by clicking ... in the Address 1 field
- #3 Double click on the Address in the Address Lookup window
- #4 If the Shipping Address you want to use is not listed, enter the address information manually
- #5 Check mark the Ship To box

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address
 Name: Buddy Chesnut
 Address 1: 1234 State Street
 Address 2:
 Attention:
 City: McKinney
 State: TX Zip Code: 75071
 Primary Contact:

Shipping Information
 Ship To Shipping Method: USPS Ground
 Shipment Date: 5/26/2017
 Address 1: 2710 Treble Creek
 Address 2: Suite 200
 Attention:
 City: San Antonio
 State: TX Zip Code: 78258

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

Ass... Part...	Associations	Type	Item Number	Description	Bin	Quantity	List Price	Price	Amount	Subtotal	Discount
> ⊕	U	Item	0084123210-219	CLEVIS PIN		1.0000	\$2.36	\$2.360	\$2.360	\$2.36	0.00 %

Click the Print button for options to print the Sales Order (Document), Pick List and/or Packing Slip

The screenshot shows a software application window with a menu bar at the top containing: File, Save, Save and New, Save and Close, **Print** (highlighted in red), Convert to Invoice, Credit Cards, Capture Signature, Update Line Item Data, and Show Open D. Below the menu bar is a toolbar with buttons for General, Attachments, Print History, Register, Document Register Detail, Order Status Report, and Customer Master. A dropdown menu is open under the 'Print' button, showing three options: Document, Pick List, and Packing Slip. The main form area contains several sections: Document Type: Sales Order, Document #: [empty], Invoice #: 0, Document Date: 5/26/2017, Status: Open, Customer PO: [empty], Salesman: Lee Chesnut, CC Auth. #: [empty], Internal Memo: [empty], and Printed Memo: [empty]. Below this is the 'Customer Address and Shipping Information (Ctrl-F9)' section, which is split into two columns. The left column is 'Customer Name and Address' with fields for Name (Buddy Chesnut), Address 1 (1234 State Street), Address 2, Attention, City (McKinney), State (TX), Zip Code (75071), and Primary Contact. The right column is 'Shipping Information' with a checked 'Ship To' box, Shipping Method (USPS Ground), Shipment Date (5/26/2017), Address 1 (2710 Treble Creek), Address 2 (Suite 200), Attention, City (San Antonio), State (TX), and Zip Code (78258). At the bottom, there is a 'Show Customer Information (F9)' section with an 'Item Number (Ctrl-N):' field and several function buttons: F2-Find Customer, F3-Add Misc. Charges, F4-Item Search, F5-Apply Core Credits, and F10-App Discour.

See the following page for examples of each print option

Document – Sales Order

Invoice #	0
Date	5/26/2017
Time	13:59

PO #:	
Document #:	212
Due Date:	5/26/2017

Salesman:	Lee Chesnut
Ship Via:	USPS Ground
Terms:	COD
Source:	

Buddy Chesnut (10001)		
1234 State Street		
McKinney	TX	75071
Contact:		

Sales Order

Reprint

Ship To:		
2710 Treble Creek		
Suite 200		
San Antonio	TX	78258

Item Number	Description	Qty	List	Bin Location				Sales Tax	Extended Amount	Back Order
				Price	Amount	Disc	Subtotal			
0084123210-219	CLEVIS PIN	1.00	\$0.00	\$2.360	\$2.36	0.00%	\$2.36	\$0.16	\$2.52	0.0000
SN: 19-125										

Pick List

Pick List
Document#: 212
Customer: Buddy Chesnut
Date: 5/26/2017

Associa- ted	Associa- tions	Type	Item Number	Description	Bin	Qua- ntity	List Price	Price	Amou- nt	Subto- tal	Disc ount	Sales Tax	Total	Item Serial	Tax Group	AFS	Back Order	Drop Ship	Quantit- y Sold	Status	SO#	Weight	Extended Weight
	U	Item	0084123210	CLEVIS PIN		1.00	\$2.3	\$2.3	\$2.3	\$2.3	0.00	\$0.16	\$2.5	19-125	TAXAB	11.000	0.0	<input type="checkbox"/>	0.0000	Open	0	0.06	0.06
									\$2.36	\$2.36		\$0.16	\$2.52										

Packing Slip

Ship To:		
Buddy Chesnut		
2710 Treble Creek		
Suite 200		
San Antonio	TX	78258
Contact:		
Ship Via:	USPS Ground	

Packing Slip

Ship From:
Lee Incorporated - LEEINC
2909 LAUREL OAK DR
MCKINNEY, TX 75071

PO #:	
Document #:	212
Date:	5/26/2017

Item Type	Item Number	Item Description	Qty Shipped	Qty on Backorder
<input type="checkbox"/> Item	0084123210-219	CLEVIS PIN	1.00	.00

Example of printed Invoice

Invoice #	109
Date	5/26/2017
Time	13:59

PO #:	
Document #:	213
Due Date:	5/26/2017

Salesman:	Lee Chesnut
Ship Via:	USPS Ground
Terms:	PAID
Source:	Sales Order 212

Buddy Chesnut (10001)		
1234 State Street		
McKinney	TX	75071
Contact:		

Invoice

Ship To:		
2710 Treble Creek		
Suite 200		
San Antonio	TX	78258

Item Number Description	Qty	List	Bin Location				Sales Tax	Extended Amount	Back Order Drop Ship
			Price	Amount	Disc	Subtotal			
0084123210-219 CLEVIS PIN SN: 19-125	1.00	\$0.00	\$2.360	\$2.36	0.00%	\$2.36	\$0.16	\$2.52	0.0000

Method 2 Drop Ship parts(s) to customer from your Supplier. Using this option, your Supplier will ship the part(s) directly to the Customer and the customer will pay you for the part(s).

When the Available for Sale (AFS) quantity is less than the quantity you are selling, the following No Stock pop-up will display.

No Stock

Item Number	OEM Vendor #	OEM Division	Description
88986814	100	NAVISTR	BELT,FAN

Package Qty	Qty On Hand	Qty Committed	AFS ²	On Stock Order
1	5.0	5.0	0.0	7.0

Company	Location	AFS	Primary Bin	On Stock Order	QOH	QOO	Qty Committed	Qty Committed on Customer...
> Lee Incorp...	LEE INC	0.0000		7.0000	5.0000	7.0000	5.0000	0.0000

Qty:

Associated Items

Assoc. Type	Price Book	Part Number	OEM Vendor	OEM Division	Description	Quantity R...	QOH	AFS	Bin
> Selected Item	NAV	88986814	100	NAVISTR	BELT,FAN	1.0000	5.0000	0.0000	

#1 Quantity you are selling
#2 Quantity Available for Sale (AFS)
#3 Select Drop Ship option

See Drop Ship window on next page.

Drop Ship window for selecting Shipping Method and Shipping Address

The screenshot shows a 'Drop Ship' window with the following fields and values:

Item Number	OEM #	OEM Division	Description
88986814	100	NAVISTR	BELT,FAN

Qty on Hand	Qty Committed	AFS	On Stock Order
5.0	5.0	0.0	7.0

Address 1: [] (2) [...]
Address 2: []
City: []
State: [] Zip Code: []

Tax Group: TAXABLE
Shipping Method: [] (1)

Buttons: OK, Cancel

#1 Select the Shipping Method from the drop down

#2 Click the ... in the Address 1 box to select the "stored" Ship to Address in the Customer Master, or manually enter the Ship To address information

NOTE: SEE INFORMATION BELOW REGARDING ADDRESS INFORMATION.

ATTENTION: The address information selected or entered in the Drop Ship window above, will ONLY populate the Drop Ship Address on the Purchase Order when the order is extracted. Care should be used when selecting or entering any address information.

If customer has a Drop Ship Address or multiple addresses on file, those will be available when selecting from the Address 1 field. If customer does not have a Drop Ship Address on file, the Bill To Address or Business Address will be available when selecting from the Address 1 field. If needed, you can manually enter the address.

After completing the Drop Ship information, be sure to check mark the Ship To box and enter the Shipping Address as needed.

RIMSS WinNetStar POS Document - 214

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

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

Document Type: Sales Order Document #: 214 Invoice #: 0 Document Date: 5/26/2017 Project #:
 Status: Open Customer PO#: Salesman: Lee Chesnut CC Auth. #: Sub Project #:
 Internal Memo: Printed Memo:

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address Shipping Information

Name: Buddy Chesnut Ship To
 Address 1: 1234 Rowdy Ridge
 Address 2:
 Attention:
 City: Dripping Springs
 State: TX Zip Code: 78258
 Primary Contact:
 Shipping Method: FEDEX Overnight
 Shipment Date: 5/30/2017
 Address 1: 1234 Rowdy Ridge
 Address 2:
 Attention:
 City: Dripping Springs
 State: TX Zip Code: 78258

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

Ass...	Associations	Type	Item Number	Description	Bin	Quantity	List Price	Price	Amount	Subtotal	Discount	Sales Tax	Total	Item Serial Number	Tax Group	AFS	Back Order	Drop Ship	Quantity Sold	Status	SO#
>	D	Item	88986814-100-NAVISTR	BELT,FAN		1.0000	\$105.52	\$105.52	\$105.520	\$105.52	0.00 %	\$7.12	\$112.64		TAXABLE	0.0000	0.0	<input checked="" type="checkbox"/>	0.0000	Open	

- #1 Check Mark the Ship To box
- #2 Select the Shipping Method from drop down
- #3 Select or enter Shipping Address / Attention as needed
- #4 Indicates Drop Ship

At this point you can convert your Sales Order to an Invoice. Since the QOH/AFS was 0 (zero) for the sale, your QOH/AFS will be -1.

Default

Drag a column header here to group by that column

Select...	Associations	Inactive	Has Associations	Data Source	Company	Location	Price Book	Item Number	Oem Vendor	Oem Division	Description	QOO	QOH	Committed	AFS	Com. On Order	Average Cost	Location System ID	System ID
		False	<input checked="" type="checkbox"/>	Location	Lee Incorpora...	LEE INC	NAV	88986814	100	NAVISTR	BELT,FAN	0.0	-1.0	0.0	-1.0	0.0	36.4400	189	186

The next step in this process is extracting your Drop Ship into a Purchase Order.

RIMSS WinNetStar

File View Company Customer Notes Receivable CRM Suppliers Employees Payroll Banking Fixed Assets **Inventory** Service Wholegoods Lease Rental Reports W

- 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
- Import ▶
- Mass Updates

#1 Selecting the Ctrl+B option will automatically extract ALL Back Orders and Drop Ships

#2 Selecting Suggested Stock Orders will display the various Order templates where you will select the System Back Orders. This is an automatic extract also.

Your order screen will display with ALL parts that are on Back Order and Drop Ship. You will want to filter down to the item(s) that are for your Customer.

Columns you can filter on to find the item(s) for your Customer Drop Ship
Type in the box below the column name to filter

The screenshot shows a table with columns: Type, Associa..., Supplier, OEM, Item Number, Description, Customer, Bin, Core, Sug. Qty, Ord. Qty, Cost, Total Cost, Stock Class, Has Associations, Package Multiple, Set Multi..., Categ..., Shipping Method, Document Date, Document Number, and Document Type. A callout box points to the Item Number, Customer, Shipping Method, and Document Number columns.

Type	Associa...	Supplier	OEM	Item Number	Description	Customer	Bin	Core	Sug. Qty	Ord. Qty	Cost	Total Cost	Stock Class	Has Associations	Package Multiple	Set Multi...	Categ...	Shipping Method	Document Date	Document Number	Document Type
Location: LEE INC																					
BackOrder	D	CASE NEW HOLL...	198	ST491A	BEARING, ...	CHESNUTLEE	A0002		\$0.00	1.0000	1.0...	\$70.00	\$70.00	8 Down-Gr...	<input checked="" type="checkbox"/>	1	0		1/6/2015 12:00:00 AM	136	Sales Order
BackOrder	C	INTERNATIONAL	100	LEE	LEE TEST	CHESNUTLEE			\$0.00	1.0000	1.0...	\$2.50	\$2.50	6 New Parts	<input type="checkbox"/>	1	0		3/31/2015 12:00:00 AM	180	Sales Order
BackOrder	C	INTERNATIONAL	100	LEE	LEE TEST	CHESNUTLEE			\$0.00	1.0000	1.0...	\$2.50	\$2.50	6 New Parts	<input type="checkbox"/>	1	0		3/31/2015 12:00:00 AM	182	Sales Order
DropShip	D	INTERNATIONAL	100	88986814	BELT,FAN	ChesnutBuddy			\$0.00	1.0000	1.0...	\$36.44	\$36.44	5 Seasonal ...	<input checked="" type="checkbox"/>	1	0	FEDEX Overnight	5/26/2017 12:00:00 AM	214	Sales Order
DropShip	D	INTERNATIONAL	100	88986814	BELT,FAN	Rogers Cable ...			\$0.00	1.0000	1.0...	\$36.44	\$36.44	5 Seasonal ...	<input checked="" type="checkbox"/>	1	0	Company Truck	5/30/2017 12:00:00 AM	216	Sales Order
BackOrder	D	AGCO	AGC	0015647U91	COVER KIT	CHESNUTLEE			\$0.00	1.0000	1.0...	\$26.00	\$26.00	6 New Parts	<input checked="" type="checkbox"/>	1	1		3/23/2015 12:00:00 AM	149	Sales Order
											\$173.88										

In this example, we are filtering the Shipping Method.

The screenshot shows the same table as above, but the Shipping Method column is filtered to 'fed', and only the row with 'FEDEX Overnight' is visible.

Type	Associa...	Supplier	OEM	Item Number	Description	Customer	Bin	Core	Sug. Qty	Ord. Qty	Cost	Total Cost	Stock Class	Has Associations	Package Multiple	Set Multi...	Categ...	Shipping Method	Document Date	Document Number	Document Type	Group	Class
Location: LEE INC																							
DropShip	D	INTERNATIO...	100	88986814	BELT,FAN	ChesnutBuddy			\$0.00	1.0000	1.0...	\$36.44	\$36.44	5 Seasonal ...	<input checked="" type="checkbox"/>	1	0	FEDEX Overnight	5/26/2017 12:00:00 AM	214	Sales Order		
											\$36.44												

Switch to the Order Summary tab, check mark the order line, and select either of the Save PO options

The screenshot shows the Order Summary tab with a table containing order line details. The 'Is Selected' checkbox is checked, and the 'Create and Save PO's' and 'Approve and Save PO's' buttons are highlighted.

Is Selected	Suggested Date	Source Location	A/P Supplier	Total Cost	Total Weight	Ship To	Shipping Method
<input checked="" type="checkbox"/>	5/31/2017	LEE INC	INTERNATIONAL	\$36.44	N/A	ChesnutBuddy	FEDEX Overnight

Either of the PO Save options will work. If you select the **Create and Save PO's**, you will need to approve the PO manually. If you select the **Approve and Save PO's**, the PO will automatically be approved. After you have selected the **Save PO** option, you will be given a display of the PO # assigned and the option to open the PO.

RIMSS WinNetStar Back Orders

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

Suggested Order Order Summary

Select All

Drag a column header here to group by that column

Is Selected	Suggested Date	Source Location	A/P Supplier	Total Cost	Total Weight
<input type="checkbox"/>	5/31/2017	LEE INC	CASE NEW HOLLAND		\$70.00 N/A
<input type="checkbox"/>	5/31/2017	LEE INC	INTERNATIONAL		\$5.00 N/A
<input type="checkbox"/>	5/31/2017	LEE INC	INTERNATIONAL		\$36.44 N/A
<input type="checkbox"/>	5/31/2017	LEE INC	AGCO		\$26.00 N/A

Purchase Orders Created

Do you wish to open the following Purchase Orders?

Document # 76 - INTERNATIONAL

Example of Purchase Order showing Ship To "Customer" along with Ship To address

Document Status: Open PO #: 76 Doc. Date: 5/31/2017 Export Date:

Approval Status: Approved App. By: lee App. Date: 5/31/2017 Supplier Order #:

Supplier Information

Name: INTERNATIONAL
 Address 1: 123 Navistar Street
 Address 2: Business Address
 City: Chicago
 State: IL Zip Code: 12345
 Phone: (123) 415-6456
 Fax: (123) 123-4564

Shipping Information

Ship To: Location Customer
 Name: ChesnutBuddy
 Address 1: 1234 Rowdy Ridge
 Address 2:
 Attention: Dripping Springs
 City: TX Zip Code: 78258
 Exp. Delivery Date: 5/31/2017
 Shipping Method: FEDEX Overnight

Messages

Supplier Message:
 Internal Memo:

Item Number (Ctrl-N):

Line Type	Number/Name	Description	Primary Bin	Order Type	Reference	Memo	Quantity	Num of Units In Cost	Unit Cost	Total	Qty Rcvd	Status	Source Doc Type	Source Doc Number
> Item	88986814-100-NAVISTR	BELT,FAN		Customer Order	ChesnutBuddy		1.0	1.0	\$36.4400	\$36.44	.0	Open	Sales Order	214

Since the item was sold, your On Hand/AFS is now -1 (negative one). Once you receive acknowledgment from your supplier, you can create an I/R Bill to adjust your On Hand/AFS back to 0 (zero).

Default

Drag a column header here to group by that column

QOO (Quantity on Order) indicates this part is on an "approved" Purchase Order

Select...	Associations	Inactive	Has Associations	Data Source	Company	Location	Price Book	Item Number	Oem Vendor	Oem Division	Description	QOO	QOH	Committed	AFS	Com. On Order	Average Cost	Location System ID	System ID
<input type="checkbox"/>	D	False	<input checked="" type="checkbox"/>	Locat...	Lee In corpora...	LEE INC	NAV	88986814	100	NAVISTR	BELT,FAN	1.0	-1.0	0.0	-1.0	1.0	36.4400	189	186

To create the Item Receipt/Bill, go to Inventory → New → Item Receipt/Bill

Your Item Receipt/Bill screen will open blank. Enter the Purchase Order # in the PO # field to populate the Item Receipt/Bill.

RIMSS WinNetStar **New IR/Bill**

Save Save and Close Save and New Save and Print Bin Labels Scan Receipt Void Export Layouts Print Receiving Report Save Attachments Add Allocation Line Items Add Sales Tax Group Items

General Scheduled Payments Attachments Related Orders

PO #: Doc. # 0 Doc. Type Item Receipt Doc. Date 5/31/2017 Status

Name: Supplier ID: 0 Pmt Terms Due Date 5/31/2017 Supplier Inv. Date 5/31/2017

Address 1: Supplier Ref.

Address 2: Supplier Ref ID:

City: Liability Account 001-2-11000-01 (ACCOUNTS PAYABLE)

State: Zip Code:

Memo

Allocation Amount \$0.00 Allocation Memo

Allocation Desc. Allocation Type:

Extended Weight Extended Dollars Qty Received

Allocate

Item Number (Ctrl-N):

Type	Number	Description	Primary Bin	Kubota Order...	Order Type	Reference	Memo	Rec'ed Qty	Needed Qty	Alloc. Qty	Qty	Unit Cost	Total	PO #

Enter your PO # here

RIMSS WinNetStar **New IR/Bill**

Save Save and Close Save and New Save and Print Bin Labels Scan Receipt Void Export Layouts Print Receiving Report Save Attachments Add Allocation Line Items Add Sales Tax Group Items

General Scheduled Payments Attachments Related Orders

PO #: 76 Doc. # 0 Doc. Type Item Receipt Doc. Date 5/31/2017 Status

Name: INTERNATIONAL Supplier ID: 44 Pmt Terms COD Due Date 5/31/2017 Supplier Inv. Date 5/31/2017

Address 1: 123 Navistar Street Supplier Ref. 184647899-154

Address 2: Business Address Supplier Ref ID: 44

City: Chicago Liability Account 001-2-11000-01 (ACCOUNTS PAYABLE)

State: IL Zip Code: 12345

Memo

Allocation Amount \$0.00 Allocation Memo

Allocation Desc. Allocation Type:

Extended Weight Extended Dollars Qty Received

Allocate

Item Number (Ctrl-N):

Type	Number	Description	Primary Bin	Kubota Order Bin Override	Order Type	Reference	Memo	Rec'ed Qty	Needed Qty	Alloc. Qty	Qty	Unit Cost	Total	PO #	Source Doc Number	Source Doc Type
Item	88986814-100-NAVISTR	BELT,FAN		P214	Customer Order	ChesnutBuddy		1.0	1.0	.0	1.0	\$36.4400	\$36.44	76	214	Sales Order

Enter any Cost changes, if needed, then Save or Save and Close to complete IR/Bill