



Customer Fixed Parts Pricing Import

Software Development
RIMSS Business Systems Technology

Company Confidential

Copyright ©1983-2017 RIMSS Business Systems Technology

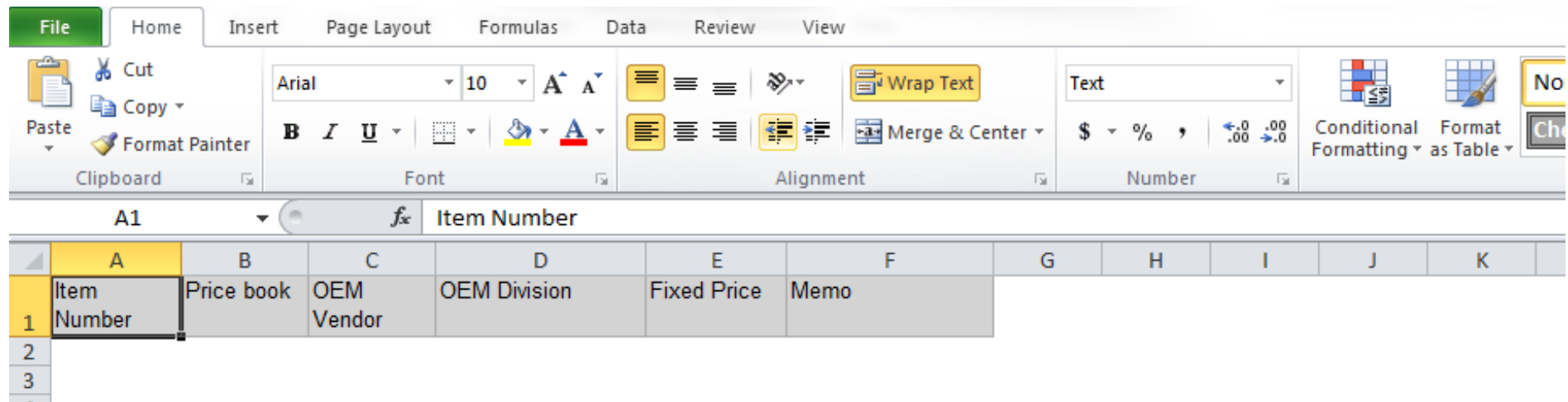
Revised 02/15/2017

This Document contains information proprietary to RIMSS Business Systems Technology. Use or disclosure without written permission is expressly forbidden.

In addition to the WinNetStar Customer Promo Pricing setup, there is also a way to enter specific parts pricing based on the Customer and Items. This information can be entered into an Excel Spreadsheet then imported into the system.

Before importing your Customer and Pricing information you will need to enter the information into your spreadsheet. Your spreadsheet must have a specific column layout and column headers. Contact RIMSS Customer Support to obtain a template to use for importing.

Sample of spreadsheet format and column:



	A	B	C	D	E	F	G	H	I	J	K
1	Item Number	Price book	OEM Vendor	OEM Division	Fixed Price	Memo					
2											
3											

The columns and column names are required and specific to importing this type of pricing. No other information or columns may be used for the import.

Column definitions:

Item Number = the part you want to price specifically price for the Customer

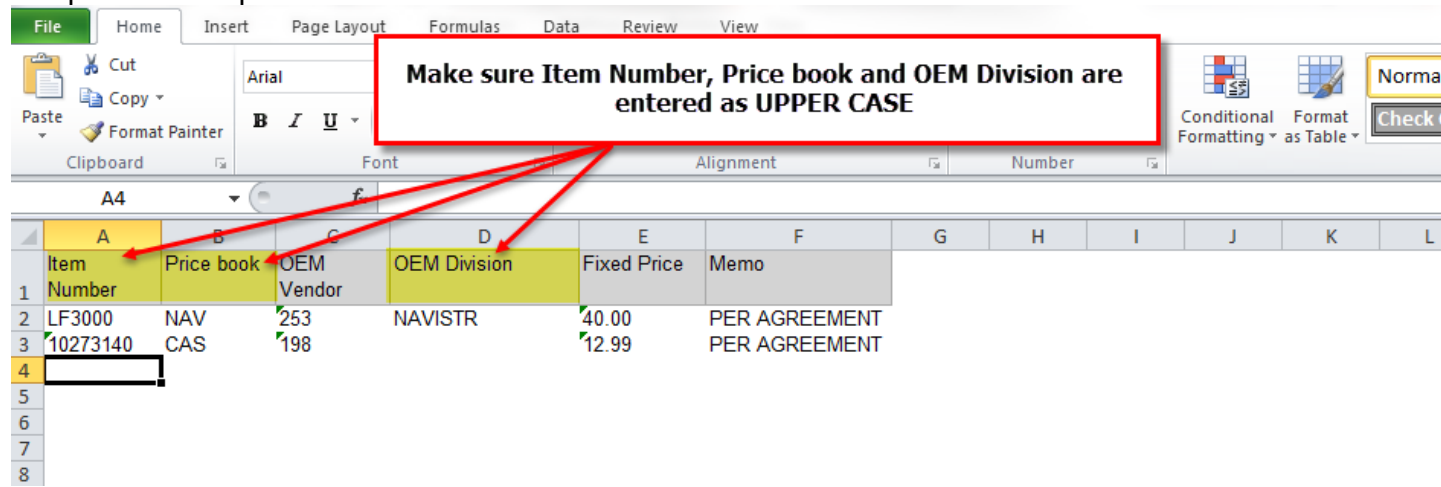
Price book, OEM Vendor = Price book and OEM Vendor from the Item Master

OEM Division = normally blank unless a Navistar part, then OEM Division is NAVISTR

Fixed Price = the amount you want to sell to the customer

Memo = any memo information needed

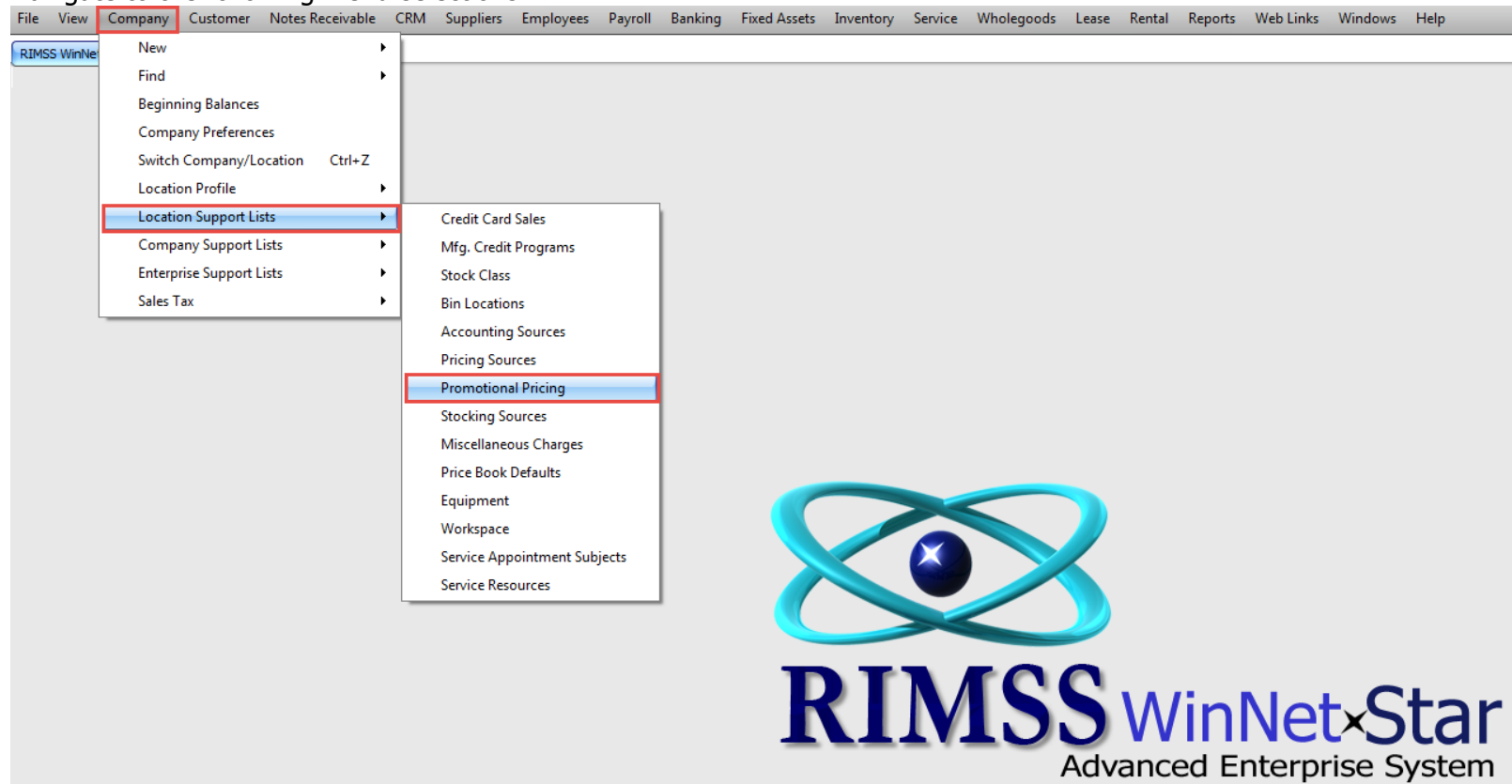
Sample of Excel spreadsheet:



Make sure Item Number, Price book and OEM Division are entered as UPPER CASE

	A	B	C	D	E	F
	Item Number	Price book	OEM Vendor	OEM Division	Fixed Price	Memo
1						
2	LF3000	NAV	253	NAVISTR	40.00	PER AGREEMENT
3	10273140	CAS	198		12.99	PER AGREEMENT
4						
5						
6						
7						
8						

Navigate to the following menu selections



Click the Customer Fixed Pricing tab to continue

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

RDMS - NetStar Promotional Pricing

Add New Print Generate Filter Data

Matrix Item Filters Customer Filters Pricing Scenarios **Customer Fixed Pricing**

Fetch

Click on Customer Fixed Pricing then Click Add New

Inactive	Name of Customer Fixed Pricing	Description	External Reference	Memo	Reference ID	Customer Name	Start Date	End Date	Apply to POS Invoice	Apply to Service Invoice	Apply to WG Invoice
<input type="checkbox"/>									<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

This window will open after clicking the Add New button:

CustomerFixedPricingForm

Header

Name: Address 1: Address 2: Attention: City: State: Zip Code: Phone: Fax:

Name: Description: External Reference: Memo: Apply To: ☐ Invoice ☐ WG Invoice ☐ Service Invoice Start Date: 2/15/2017 End Date: 2/15/2017 ☐ Inactive

Import Copy Validate Save Close

Detail

Drag a column header here to group by that column

Item Number	Price Book	OEM Vendor	OEM Division	Fixed Price	Memo

The numbered fields below (#1 - #6) are required and follow the order of setup.

CustomerFixedPricingForm

Header

Name: **1** Name: **2** ☐ Inactive **8**

Address 1: Description: **3**

Address 2: External Reference:

Attention: Memo: **4** **7**

City: Apply To: **5** ☐ Invoice ☐ WG Invoice ☐ Service Invoice

State: Zip Code: Start Date: **6** End Date:

Phone:

Fax:

Detail

Drag a column header here to group by that column

	Item Number	Price Book	OEM Vendor	OEM Division	Fixed Price	Memo
<input type="button" value="v"/>						
<input type="button" value="x"/>						

***** SEE NEXT PAGE FOR ADDITIONAL INFORMATION ON COMPLETING FORM SETUP *****

#1 from above

CustomerFixedPricingForm

Header

Name: **...** ☐ Inactive

Address 1:

Address 2:

Attention:

City:

State: Zip Code:

Phone:

Fax:

Description:

External Reference:

Memo:

Apply To: ☐ Invoice ☐ WG Invoice ☐ Service Invoice

Start Date: 2/15/2017 End Date: 2/15/2017

Import
Copy
Validate
Save
Close

Click on the ... in the Name Field to open the Customer Search List below

Customer List

Add New Restore Layout Layouts

System ID Ref ID Name Bus. Phone/Bus. Email/Primary Contact Last Name

GOLDEN RETREIVER

Default

Drag a column header here to group by that column

Customer Id	Customer Name	Inactive	Customer Type	Price Level	Home Location	Last POS Transaction...	Created Date	Created B
10001B	GOLDEN RETREIVER FARMS	False	Retail	Trade	RIMSS TRUCKS/WILLIAMSTON	2/9/2017 3...	2/9/2017 3...	leerimss

☒ [Inactive] = 'False'

Enter Customer Name then Fetch
Double click Customer Name to select

CustomerFixedPricingForm

Header

Name: GOLDEN RETREIVER FARMS
 Address 1: 2710 TREBLE CREEK
 Address 2:
 Attention:
 City: SAN ANTONIO
 State: TX Zip Code: 78258
 Phone:
 Fax:

Name: GOLDEN RETREIVER FARMS ☐ Inactive
 Description: FIXED PRICING FOR LF3000 AND 10273140
 External Reference:
 Memo: PER AGREEMENT WITH CUSTOMER
 Apply To: ☒ Invoice ☐ WG Invoice ☒ Service Invoice
 Start Date: 2/15/2017 End Date: 2/31/2017

Import
Copy
Validate
Save
Close

Detail

Drag a column header here to group by that column

	Item Number	Price Book	OEM Vendor	OEM Division	Fixed Price	Memo
🔍						
✱						

#2. Enter a name for the file you are creating

#3. Enter a description for the file you are creating

#4. Enter any Memo information needed

#5. Check mark the Document Types that will apply to the fixed pricing

#6. Enter a Start / End Date this pricing setup

After entering the information above, click Save, then click Import

CustomerFixedPricingForm

Header

Name: GOLDEN RETREIVER FARMS

Address 1: 2710 TREBLE CREEK

Address 2:

Attention:

City: SAN ANTONIO

State: TX Zip Code: 78258

Phone:

Fax:

Name: GOLDEN RETREIVER FARMS ☐ Inactive

Description: FIXED PRICING FOR LF3000 AND 10273140

External Reference:

Memo: PER AGREEMENT WITH CUSTOMER

Apply To: ☒ Invoice ☐ WG Invoice ☒ Service Invoice

Start Date: 2/15/2017 End Date: 3/31/2017

Import

Copy

Validate

Save

Close

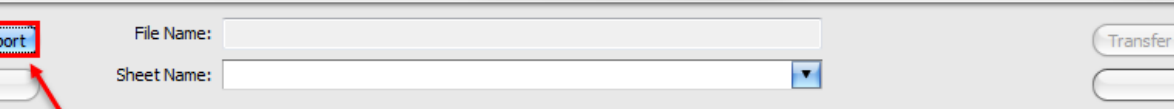
Detail

Drag a column header here to group by that column

Item Number	Price Book	OEM Vendor

Click Save then Click Import

After clicking the Import button above, the following window will open



Import Data

Select File to Import

File Name:

Sheet Name:

Data Rows imported:

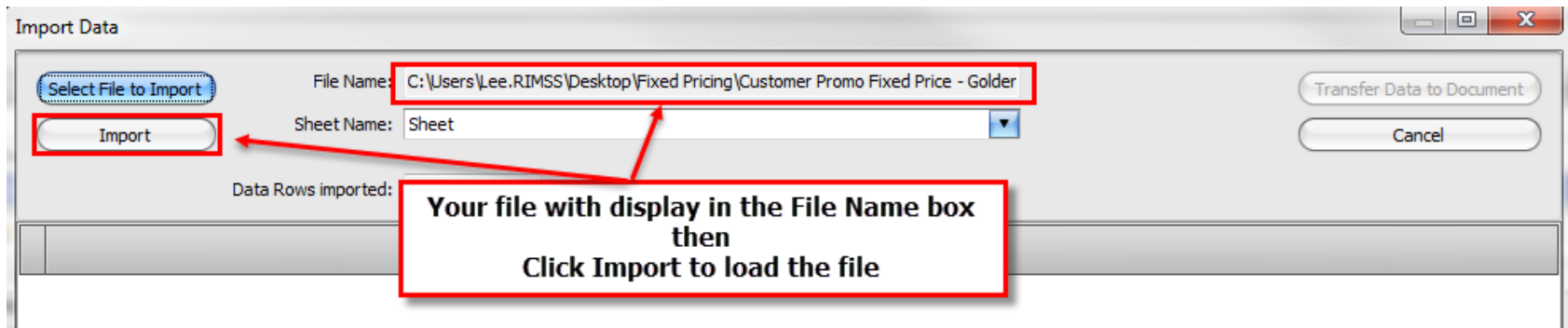
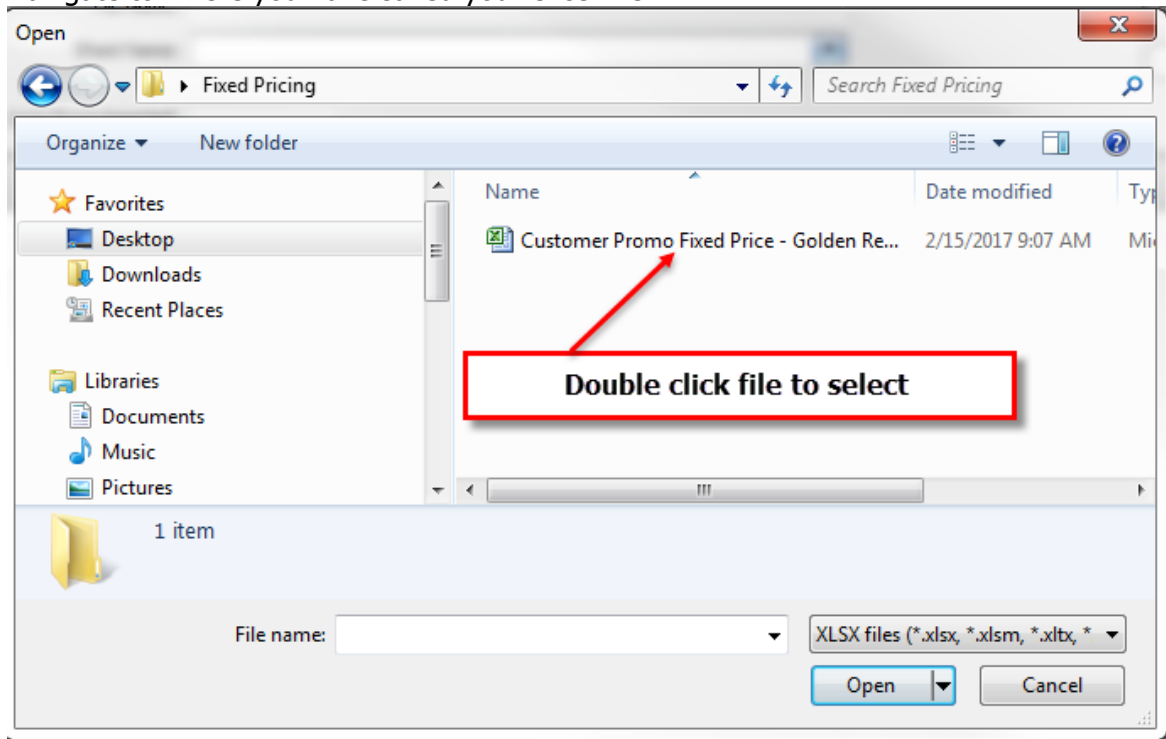
Import

Transfer Data to Document

Cancel

Click Select File to Import

Navigate to where you have saved your excel file



Import Data

Select File to Import:

File Name: C:\Users\Lee.RIMS\...
 Sheet Name: Sheet

Data Rows imported: 2

**The information from your spreadsheet
 will display from your import.

 Press "Transfer Data to Document"**

Item Number	Price book	OEM Vendor	OEM Division	Fixed Price	Memo
LF3000	NAV	253	NAVISTR	40.00	PER AGREEMENT
10273140	CAS	198		12.99	PER AGREEMENT

CustomerFixedPricingForm

Header

Name: GOLDEN RETREIVER FARMS
 Address 1: 2710 TREBLE CREEK
 Address 2:
 Attention:
 City: SAN ANTONIO
 State:
 Phone:
 Fax:

Name: GOLDEN RETREIVER FARMS ☐ Inactive
 Description: FIXED PRICING FOR LF3000 AND 10273140
 External Reference:
 Memo: PER AGREEMENT WITH CUSTOMER

**Press the Validate button to verify the Item
 information is correct, then Press Save.**

☐ Invoice ☐ WG Invoice ☒ Service Invoice
 2017 End Date: 3/31/2017

Detail

Drag a column header here to group by that column

Item Number	Price Book	OEM Vendor	OEM Division	Fixed Price	Memo
LF3000	NAV	253	NAVISTR	40.00	PER AGREEMENT
10273140	CAS	198		12.99	PER AGREEMENT

If you need to copy this same pricing setup to a different customer, press the Copy button to start the process over again.

CustomerFixedPricingForm

Header

Name: GOLDEN RETREIVER FARMS
Address 1: 2710 TREBLE CREEK
Address 2:
Attention:
City: SAN ANTONIO
State: TX Zip Code: 78258
Phone:
Fax:

Name: GOLDEN RETREIVER FARMS ☐ Inactive
Description: FIXED PRICING FOR LF3000 AND 10273140
External Reference:
Memo: PER AGREEMENT WITH CUSTOMER
Apply To: ☒ Invoice ☐ WG Invoice ☒ Service Invoice
Start Date: 2/15/2017 End Date: 3/31/2017

Buttons: Import, Copy, Validate, Save, Close

Detail

Drag a column header here to group by that column

Item Number	Price Book	OEM Vendor	OEM Division	Fixed Price	Memo
LF3000	NAV	253	NAVISTR	40.00	PER AGREEMENT
10273140	CAS	198		12.99	PER AGREEMENT

Copy Options

? Copy To Another Customer?

Yes No Cancel

CustomerFixedPricingForm

Header

Name: GOLDEN RETREIVER FARMS
Address 1: 2710 TREBLE CREEK
Address 2:
Attention:
City: SAN ANTONIO
State: TX Zip Code: 78258
Phone:
Fax:

Name: GOLDEN RETREIVER FARMS ☐ Inactive
Description: FIXED PRICING FOR LF3000 AND 10273140
External Reference:
Memo: PER AGREEMENT WITH CUSTOMER
Apply To: ☒ Invoice ☐ WG Invoice ☒ Service Invoice
Start Date: 2/15/2017 End Date: 3/31/2017

Buttons: Import, Copy, Validate, Save, Close

Detail

Drag a column header here to group by that column

Item Number	Price Book	OEM Vendor	OEM Division	Fixed Price	Memo
LF3000	NAV	253	NAVISTR	40.00	PER AGREEMENT
10273140	CAS	198		12.99	PER AGREEMENT

When you have closed out the window above, you will return to the Customer Fixed Pricing tab. Press the Fetch button to refresh the list

RIMSS WinNetStar

Promotional Pricing

Add NewPrintGenerate Filter Data

MatrixItem FiltersCustomer FiltersPricing ScenariosCustomer Fixed Pricing

Fetch

Drag a column header here to group by that column

Inactive	Name of Customer Fixed Pri...	Description	External Reference	Memo	Reference ID	Customer Name	Start Date	End Date	Apply to POS Invoice	Apply to Service Invoice	Apply to WG Invoice
									<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
> False	GOLDEN RETREIVER FARMS	FIXED PRICING FOR LF3000...		PER AGREEMENT WITH CUS...	10001B	GOLDEN RETREIVER FARMS	2/15/2017	3/31/2017	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>