



Creating a Parts Estimate

How to create a Parts Estimate

Software Development
RIMSS Business Systems Technology

Company Confidential

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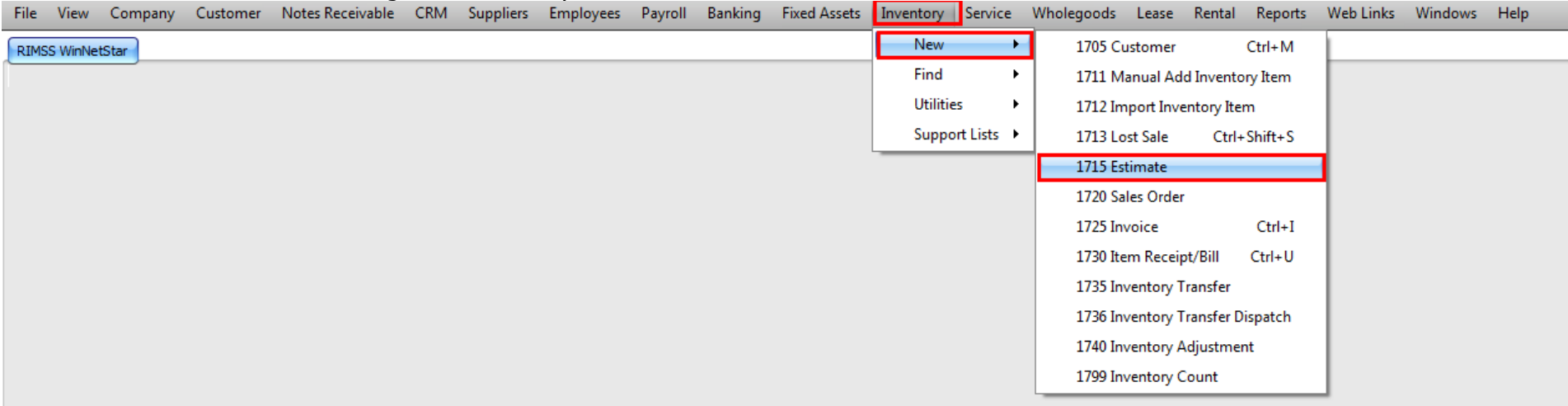
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Parts Estimate can be created for several reasons. A Parts Estimate can be created for a specific customer who needs pricing for a group or list of parts. It can be created for a specific group of parts that are always sold together. Parts Estimates do NOT affect your On Hand or AFS (Available for Sale). Part Estimates can be converted into a Parts Sales Order that can then be converted into a Parts Invoice, or the Parts Estimate can be converted directly into a Parts Invoice. A generic Parts Estimate can be created using your Cash Customer default then converted to a Parts Sales Order using your customers name and will pricing according to the customer setup.

These instructions will cover the basics of creating a Parts Estimate. Due to different scenarios and uses not all examples can be covered. Should you have a particular situation that is not covered in these instructions please contact Customer Support for assistance.

To create a new Parts Estimate navigate to Inventory → New → Estimate



A new Estimate screen will open. Enter your search information to find your Customer Master.

RIMSS WinNetStar New Estimate

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

File Save Save and New Save and Close Print Credit Cards

General Attachments Print History Wholegoods Documents

Document Type: Estimate Document #: 0

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: 1 CASH CUSTOMER ... 2 Ship To Shipping Method: Shipment Date: 2/20/2017

Address 1: ... Address 1: ...

Address 2: Address 2: Attention: City: State: Zip Code: State: Zip Code: Primary Contact:

Show Customer Information (F9)

Item Number (Ctrl-N): F2-Find Customer F3-Add Misc. Charges F4-Item Search F10-Apply Discount

Ass... Part...	Associations	Type	Item Number	Description	AFS	Bin	Quantity	List Price	Price	Amount	Subtotal	Discount	Sales Tax	Total
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Sample of #1 above

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

RIMSS WinNetStar **New Estimate**

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

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

Document Type: Estimate Document #: 0 Invoice #: 0 Document Date: 2/20/2017 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: GOLDEN RETREIVER FARMS
 Address 1: 2710 TREBLE CREEK
 Address 2:
 Attention:
 City: SAN ANTONIO
 State: TX Zip Code: 78258
 Primary Contact: DOGG, ROWDY (800) 766-4642

☐ Ship To Shipping Method:
 Shipment Date: 2/20/2017
 Address 1:
 Address 2:
 Attention:
 City:
 State: Zip Code:

Show Customer Information (F9)

Item Number (Ctrl-N): F2-Find Customer F3-Add Misc. Charges F4-Item Search F10-Applly Discount

Ass...	Associations	Type	Item Number	Description	AFS	Bin	Quantity	List Price	Price	Amount	Subtotal	Discount	Sales Tax	Total
--------	--------------	------	-------------	-------------	-----	-----	----------	------------	-------	--------	----------	----------	-----------	-------

Sample of #2 above

Customer List

Add New Restore Layout Layouts

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

Drag a column header here to group by that column

Search by using any of these fields

Customer Id	Customer Name	Inactive	Customer Type	Price Level	Home Location	Last POS Transactio...
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Item Numbers are added using either the Item Number box, or the F4-Item Search

RIMSS WinNetStar **New Estimate**

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

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

Document Type: Estimate Document #: 0 Invoice #: 0 Document Date: 2/20/2017 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: GOLDEN RETRIEVER FARMS
 Address 1: 2710 TREBLE CREEK
 Address 2:
 Attention:
 City: SAN ANTONIO
 State: TX Zip Code: 78258
 Primary Contact: DOGG, ROWDY (800) 766-4642

☐ Ship To Shipping Method:
 Shipment Date: 2/20/2017
 Address 1:
 Address 2:
 Attention:
 City:
 State: Zip Code:

Show Customer Information (F9)

Item Number (Ctrl-N): **F2-Find Customer F3-Add Misc. Charges F4-Item Search F10-Apply Discount**

Ass... Part...	Associations	Type	Item Number	Description	AFS	Bin	Quantity	List Price	Price	Amount	Subtotal	Discount	Sales Tax	Total
----------------	--------------	------	-------------	-------------	-----	-----	----------	------------	-------	--------	----------	----------	-----------	-------

Enter Items as required, then press Save

RIMSS WinNetStar **1** Estimate List **POS Document - 244172**

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

General Attachments Print History Wholegoods Document Register Document Register Detail

Document Type: Estimate Document #: 244172 Invoice #: 0 **#1 Press Save after Items have been entered**
 Status: Open Customer PO#: Salesman: LEE CHESNUT
 Internal Memo: Printed Memo:

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address Shipping Information

Name: GOLDEN RETRIEVER FARMS
 Address 1: 2710 TREBLE CREEK
 Address 2:
 Attention:
 City: SAN ANTONIO
 State: TX Zip Code: 78258
 Primary Contact: DOGG, ROWDY (800) 766-4642

☐ Ship To Shipping Method:
 Shipment Date: 2/21/2017

NOTE: Items with a Core Charge will not have the option of giving Core Credit(s) until Estimate is converted to a Sales Order / Invoice

Show Customer Information (F9)

Item Number (Ctrl-N): **F2-Find Customer F3-Add Misc. Charges F4-Item Search F10-Apply Discount**

Ass... Part...	Associations	Type	Item Number	Description	Bin	Quantity	List Price	Price	Amount	Subtotal	Discount	Sales Tax	Total	Tax Group	Back Order	Drop Ship	Quantity Sold	Status	SO#	Weight	Extended Weight	Item Serial Number
		Item	168189-191-100-NAVISTR	HOUSING	B2-2	1.0000	\$2,030.57	\$1,423.180	\$1,423.180	\$1,423.18	0.00 %	\$117.41	\$1,540.59	NC MAR...	0.0	<input type="checkbox"/>	0.0000	N/A	0	0.00	0.00	
>	D	Item	182515SC92-100-NAVISTR	TRBOCHGR,TURBOCHARGER AS...	W-FLR	1.0000	\$3,409.90	\$3,193.120	\$3,193.120	\$3,193.12	0.00 %	\$263.44	\$3,456.56	NC MAR...	0.0	<input type="checkbox"/>	0.0000	N/A	0	38.00	38.00	
		Core Chrg.	182515SC92-100-NAVISTR	TRBOCHGR,TURBOCHARGER AS...	W-FLR	1.0000	\$528.00	\$528.000	\$528.000	\$528.00	0.00 %	\$43.56	\$571.56	NC MAR...	0.0	<input type="checkbox"/>	0.0000	N/A	0	0.00	0.00	

Depending on your preference, you can convert to a Sales Order or an Invoice. If converted into a Sales Order, additional parts may be added or deleted then converted to an Invoice. If converted directly to an Invoice, you will need to complete the settlement process.

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

RIMSS WinNetStar POS Document - 244172

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

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

Document Type: Estimate Document #: 244172 Invoice #: 0 Document Date: 2/21/2017 Project #: Internal Memo: Status: Open Customer PO#: Salesman: LEE CHESNUT CC Auth. #: Sub Project #: Printed Memo:

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address Shipping Information

Name: GOLDEN RETREIVER FARMS Address 1: 2710 TREBLE CREEK Address 2: Attention: SAN ANTONIO State: TX Zip Code: 78258 Primary Contact: DOGG, ROWDY (800) 766-4642

Ship To Shipping Method: Shipment Date: 2/21/2017 Address 1: Address 2: Attention: City: State: Zip Code:

Show Customer Information (F9)

Item Number (Ctrl-N): F2-Find Customer F3-Add Misc. Charges F4-Item Search F10-Apply Discount

Ass... Part...	Associations	Type	Item Number	Description	Bin	Quantity	List Price	Price	Amount	Subtotal	Discount	Sales Tax	Total	Tax Group	Back Order	Drop Ship	Quantity Sold	Status	SO#	Weight	Extended Weight	Item Serial Number
		Item	1681891C91-100-NAVISTR	HOUSING	B2-2	1.0000	\$2,030.57	\$1,423.180	\$1,423.180	\$1,423.18	0.00 %	\$117.41	\$1,540.59	NC MAR...	0.0		0.0000	N/A		0	0.00	0.00
	D	Item	1825155C92-100-NAVISTR	TRBOCHGR,TURBOCHARGER AS...	W-FLR	1.0000	\$3,409.90	\$3,193.120	\$3,193.120	\$3,193.12	0.00 %	\$263.44	\$3,456.56	NC MAR...	0.0		0.0000	N/A		0	38.00	38.00
>		Core Chrg.	1825155C92-100-NAVISTR	TRBOCHGR,TURBOCHARGER AS...	W-FLR	1.0000	\$528.00	\$528.000	\$528.000	\$528.00	0.00 %	\$43.56	\$571.56	NC MAR...	0.0		0.0000	N/A		0	0.00	0.00

#1 Convert to Sales Order

#2 Convert to Invoice

See next page for converting to Sales Order, or converting directly to Invoice

Sales Order process – Before Save

RIMSS WinNetStar **New Sales Order**

File Save **3** Save and New Save and Close Print Credit Cards **2** Capture Signature Update Line Item Data Show Open Documents

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

Document Type: Sales Order Document #: 0 Invoice #: 0 Document Date: 2/22/2017 Project #:
1 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: GOLDEN RETRIEVER FARMS
 Address 1: 2710 TREBLE CREEK
 Address 2:
 Attention:
 City: SAN ANTONIO
 State: TX Zip Code: 78258
 Primary Contact: DOGG, ROWDY (800) 766-4642

☐ Ship To Shipping Method:
 Shipment Date: 2/21/2017
 Address 1:
 Address 2:
 Attention:
 City:
 State: Zip Code:

#1 Document Type now Sales Order
#2 No Document assigned until Saved
#3 Press Save to save and assign Sales Order #

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	Tax Group	Back Order	Drop Ship	Quantity Sold	Status	SO#	Weight	Extended Weight	Item Serial Number
			Item	1681891C91-100-NAVISTR	HOUSING	B2-2	1.0000	\$2,030.57	\$1,423.180	\$1,423.180	\$1,423.18	0.00 %	\$117.41	\$1,540.59	NC MAR...	0.0	<input type="checkbox"/>	0.0000	N/A	244172	0.00	0.00	
		D	Item	1825155C92-100-NAVISTR	TRBOCHGR,TURBOCHARGER AS...	W-FLR	1.0000	\$3,409.90	\$3,193.120	\$3,193.120	\$3,193.12	0.00 %	\$263.44	\$3,456.56	NC MAR...	0.0	<input type="checkbox"/>	0.0000	N/A	244172	38.00	38.00	
			Core Chrg.	1825155C92-100-NAVISTR	TRBOCHGR,TURBOCHARGER AS...	W-FLR	1.0000	\$528.00	\$528.000	\$528.000	\$528.00	0.00 %	\$43.56	\$571.56	NC MAR...	0.0	<input type="checkbox"/>	0.0000	N/A	244172	0.00	0.00	

Sales Order process – After Save

RIMSS WinNetStar **POS Document - 244177**

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 Wholegoods Document Register Document Register Detail Order Status Report Customer Master

Document Type: Sales Order Document #: **244177** **1** Invoice #: 0 Document Date: 2/22/2017 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: GOLDEN RETRIEVER FARMS
 Address 1: 2710 TREBLE CREEK
 Address 2:
 Attention:
 City: SAN ANTONIO
 State: TX Zip Code: 78258
 Primary Contact: DOGG, ROWDY (800) 766-4642

☐ Ship To Shipping Method:
 Shipment Date: 2/21/2017
 Address 1:
 Address 2:
 Attention:
 City:
 State: Zip Code:

#1 Document # assigned
#2 Apply Core Credit (if core returned)

Show Customer Information (F9)

Item Number (Ctrl-N): F2-Find Customer F3-Add Misc. Charges F4-Item Search **2** 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	Tax Group	Back Order	Drop Ship	Quantity Sold	Status	SO#	Weight	Extended Weight	Item Serial Number
			Item	1681891C91-100-NAVISTR	HOUSING	B2-2	1.0000	\$2,030.57	\$1,423.180	\$1,423.180	\$1,423.18	0.00 %	\$117.41	\$1,540.59	NC MAR...	0.0	<input type="checkbox"/>	0.0000	Open	244172	0.00	0.00	
		D	Item	1825155C92-100-NAVISTR	TRBOCHGR,TURBOCHARGER AS...	W-FLR	1.0000	\$3,409.90	\$3,193.120	\$3,193.120	\$3,193.12	0.00 %	\$263.44	\$3,456.56	NC MAR...	0.0	<input type="checkbox"/>	0.0000	Open	244172	38.00	38.00	
			Core Chrg.	1825155C92-100-NAVISTR	TRBOCHGR,TURBOCHARGER AS...	W-FLR	1.0000	\$528.00	\$528.000	\$528.000	\$528.00	0.00 %	\$43.56	\$571.56	NC MAR...	0.0	<input type="checkbox"/>	0.0000	Open	244172	0.00	0.00	

Converting Estimate directly to Invoice

RIMSS WinNetStar

POS Estimate List

New Invoice

File

Save

Save and New

Save and Close

Print

Credit Cards

Update Line Item Data

Show Open Documents

General

1

Print History

Wholegoods

Document Register

2

Document Register Detail

Order Status Report

Customer Master

Document Type:

Invoice

Document #:

0

Invoice #:

0

Document Date:

2/22/2017

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:

GOLDEN RETRIEVER FARMS

Address 1:

2710 TREBLE CREEK

Address 2:

Attention:

City:

SAN ANTONIO

State:

TX

Zip Code:

78258

Primary Contact:

DOGG, ROWDY (800) 766-4642

Shipping Information

☐ Ship To

Shipping Method:

Shipment Date:

2/21/2017

Address 1:

Address 2:

Attention:

City:

State:

Zip Code:

#1 Document Type now Invoice

#2 Document and Invoice # will be assigned after collecting payment

\$3 Collect Payment

3

Show Customer Information (F9)

Item Number (Ctrl-N):

F2-Find Customer

F3-Add Misc. Charges

F4-Item Search

F5-Apply Core Credits

F6-Collect Payment

Settle to GL

F10-Apply Discount

Ass...	Associations	Type	Item Number	Description	Bin	Quantity	List Price	Price	Amount	Subtotal	Discount	Sales Tax	Total	Tax Group	Back Order	Drop Ship	Quantity Sold	Status	SO#	Weight	Extended Weight	Item Serial Number
>		Item	1681891C91-100-NAVISTR	HOUSING	B2-2	1.0000	\$2,030.57	\$1,423.180	\$1,423.180	\$1,423.18	0.00 %	\$117.41	\$1,540.59	NC MAR...	0.0		0.0000	N/A	244172	0.00	0.00	
	D	Item	1825155C92-100-NAVISTR	TRBOCHGR,TURBOCHARGER AS...	W-FLR	1.0000	\$3,409.90	\$3,193.120	\$3,193.120	\$3,193.12	0.00 %	\$263.44	\$3,456.56	NC MAR...	0.0		0.0000	N/A	244172	38.00	38.00	
		Core Chrg.	1825155C92-100-NAVISTR	TRBOCHGR,TURBOCHARGER AS...	W-FLR	1.0000	\$528.00	\$528.000	\$528.000	\$528.00	0.00 %	\$43.56	\$571.56	NC MAR...	0.0		0.0000	N/A	244172	0.00	0.00	