

**Creating a Parts Sales Order and Invoice** 

Software Development RIMSS Business Systems Technology

Company Confidential Copyright ©1983-2017 RIMSS Business Systems Technology Revised 02/28/2017 This Document contains information proprietary to RIMSS Business Systems Technology. Use or disclosure without written permission is expressly forbidden. Instructions for creating a Parts Sales Order and converting into an Parts Invoice. These instructions will cover the basics of creating a Parts Sales Order and Invoice. 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.

File	View	Company	Customer	Notes Receivable	CRM	Suppliers	Employees	Payroll	Banking	Fixed Assets	Inventory	Service	Wholegoods	Lease	Rental	Reports	W
RIMS	S WinNet	Star									New	•	1705 Cu	ustomer		Ctrl+M	L
											Find	•	1711 M	anual Ad	d Invento	ory Item	
											Utilitie	es 🕨	1712 Im	port Inve	entory Ite	m	
											Suppo	ort Lists 🔸	1713 Lo	st Sale	Ctrl+	-Shift+S	
													1715 Es	timate			1
													1720 Sa	les Ordei	r		3
													1725 In	voice		Ctrl+I	1
													1730 Ite	m Recei	pt/Bill	Ctrl+U	1
													1735 Inv	ventory 1	ransfer		1
													1736 Inv	ventory 1	Fransfer D	ispatch	1
													1740 Inv	ventory A	Adjustme	nt	1
													1799 In	ventory (	Count		

#### To create a new Parts Sales Orders, navigate to Inventory $\rightarrow$ New $\rightarrow$ Sales Order

File View Company Customer Notes Receivable CRI	M Suppliers Employees Payroll Banking Fixed	Assets Inventory Service Wholegoods	Lease Rental Reports Web Links Windows H
RIMSS WinNetStar New Sales Order 💌 File Save Save and New Save and Close Print Credit	*** Note *** To have the s based on the login of	Galesman field auto-populate ontact RIMSS Support	
General Attachments Print History Wholegoods	Document Register Document Register Detail Order Sta	us Report Customer Master	
Document Type:         Sales Order         Document #:         0           Status:         Open         Customer PO#:         Internal Memo:	Invoice 0 Docume Salesman: LEE CHESNUT T CC Aut Printed Memo:	Int Date:     2/24/2017     Project #:       In. #:     Sub Project #:	
Customer Address and Shipping Information (Ctrl-F9) Customer Name and Address 2	Shipping Information		
Name:     1     CASH CUSTOMER       Address 1:        Address 2:        Attention:	Ship To Shipping Method: Shipment Date: 2/24/2017 Address 1: Address 2:	#1 Enter the Customer Ref #2 Press the to ente	Td in the blue highlighted area or er the Customer search mode
State: Zip Code: Primary Contact:	Attention: City: State: Zip Code:		
Show Customer Information (F9)			
Item Number (Ctrl-N):	nd ner (F3-Add Misc.) (F4-Item Charges (Search Core Credits)	F10-Apply Discount	
Ass Associations Type Item Number D	escription Bin Quantity	List Price Price Amount Subtotal	Discount Sales Tax Total Tax Group Back C

## Example of #1 above

General	Attachments	Print History	Wholeg	joods D	ocumen	t Register	Documer	nt Regist	ter Detail	Order Stat	us Report	Custome	r Master	]		
Document Type:	Sales Order	Document	: #: 0				Invoice #:	0		Docume	nt Date:	2/24/2017	•	Project #:		
Status:	Open	Customer	PO#:		••••		Salesman:	LEE CH	ESNUT	CC Auth	n. #:			Sub Proje	ct #:	
Internal Memo:						Prin	nted Memo:									
Customer Address and Shipping Information (Ctrl-F9)																
Customer Address and Shipping Information (Ctrl+9) Customer Name and Address Shipping Information Customer Name and Address																
Customer Name and Address     Shipping Information       Name:     GOLDEN RETREIVER FARMS       Ship To     Shipping Method:																
Address 1:	2710 TREBLE	CREEK					Shipment D	ate:	2/24/2017			-				
Address 2:							Address 1:	Ĺ								
Attention:							Address 2:									
City:	SAN ANTONIO	)					Attention:	Ī								
State:	TX	Zip Code:	78258				City:									
Primary Contact:	DOGG, ROWD	Y (800) 766-464	2				State:			Zip Code:						
Show Customer I	nformation (F9)	)														
Item Number (Ct	rl-N):			F2-Find Custome	er (F	3-Add Mi Charges	sc. F4- Sei	Item arch	F5-Appl Core Crec	y Jits			F	10-Apply Discount		
	intions Turns	Itom Numb	or	Der	scription			Bin	Quar	otity	List Price	Price	Ame	unt	Subtotal	Disc

### Example of #2 above

File       View       Company       Customer       Notes Receivable       CRM       Suppliers         RIMSS       WinNetStar       New Sales Order       Image: Company       Image: Company<	Employees       Payroll       Banking       Fixed Assets       Inventory       Service       Wholegoods       Lease       Rental       Reports       Web Links       Windows       Help         Customer List       This window will open when pressing the from the Name field.       Enter the System ID, Ref Id or Name and press Fetch       Image: Customer Layout       Image: Customer Layout	
Document Type: Sales Order Document #: 0	System ID Ref ID Name Bus. Phone/Bus. Email/Primary Contact Last Name	
Internal Memo:		
Customer Address and Shipping Information (Ctrl+F9)	Default	
Customer Name and Address 2 Shipping inf	Drag a column header here to group by that column	
Name: CASH CUSTOMER Ship To	Customer Id Customer Name Inactive 🖗 Customer Type Price Level Home Location	
Address 1:	9	
Address 2:		
City:		
State: Zip Code:		
Primary Contact:		
Show Customer Information (F9)		
Item Number (Ctrl-N): F2-Find Customer (Ctrl-N):	Inactive] = 'False'       ►       Edit Filter	
Ass Associations Type Item Number Description		rop Ship

# Entering items/parts into the Sales Order

RIMSS WinNetStar New Sales	Order 🛞														
File Save Save and New	Save and Close Print Credi	t Cards Capture Signature	Update Line Iter	n Data Show Open	Documents										
General Attachment	s Print History Wholegoods	Document Register Docume	nt Register Detail	Order Status Report	Customer Master	r									
Document Type: Sales Order	Document #: 0	Invoice #:	0	Document Date: 2	/24/2017	Project #:									
Status: Open	Customer PO#:	Salesman:	LEE CHESNUT	CC Auth. #:		Sub Project #:									
Internal Memo:		Printed Memo:					, 								
Customer Address and Shippin	g Information (Ctrl-F9)														
Customer Name and Address	ustomer Name and Address Shipping Information														
Name: GOLDEN RET	me: GOLDEN RETREIVER FARMS														
Address 1: 2710 TREBLE	CREEK	#1 Enter you	ır Item Num	ber and press	enter.										
Address 2:															
Attention:	0	#2 Your Qua	ntity sold w	ill default to 1	, enter										
State: TX	Zip Code: 78258	quai	ntity sold an	d press OK											
Primary Contact: DOGG, ROW	DY (800) 766-4642	State:		Zip Code:	_										
		1			)										
Show Customer Information (F	"														
Item Number (Ctrl-N): 100-25	87 F2-Fir Custor	nd mer F3-Add Misc. F4- Charges Se	-Item earch F5-App Core Cre	oly dits	F	10-Apply Discount									
Ass Associations Type Part	Item Number D	escription	Bin Qua	antity List Price	Price Am	ount Subtot	al Discount	Sales Ta							
		Item Quantity													
		Quert'hu													
		Quantity:	1.0	<b>'</b>											
			2 ок												

## Searching for items/parts

File View Company Customer Notes Receivable CRM Suppliers Employees Payroll Banking	Find Inventory Item	n	and into the	a fapera d	tan only Mindow	-				x				
RIMSS WinNetStar New Sales Order		Drive Dr. d.			OFM	0511	Division them Development							
File Save Save and New Save and Close Print Credit Cards Capture Signature Update Line Item Da	al WILLIAMSTON	All Price Book	Item Nu	nuer	ALL	OEM	Division Item Description		Fetch					
General Attachments Print History Wholegoods Document Register Document Register Detail Ord	de									- 11				
Document Type: Sales Order Document #* 0 Invoice #* 0 I	Category	Group	Class		Pricing Source	Stock	Class							
#1 Fither enter part of the Item Number	d	•	-			•	Indude Cata	alog	Select All					
Int Or	Drag a column head	ler here to group by the	1000											
a #2 Press the F4-Item Search to open the Find Inventory		Inactive & Hac	ata Source Location	Price Rook It	tem Number	Oem	Oem Description	Package	OOH Committed					
C Item screen.	Associations	Associations	ata source Location	Price book 10	tem Number	Vendor	Division	Multiple	QUH Committed					
(Entering a partial item # will work the same in either case)	- 7													
Ad #3 Double click on the Item Number to select 017			ocation WILLIA	. CAS 10	00-11137	198	RING, SNAP	0.0	0.0 0	0.				
Ad		Faise 🔽 I	ocation WILLIA	CAS 10	00-111/5	198	RING, SNAP	0.0	0.0 0					
Attention: Address 2:		False 🚺 I	ocation WILLIA	. CAS 10	00-11200	198	RING, SNAP	0.0	0.0 0	0.				
State: TX Zip Code: 78258 City:	DU F	False 🗹 I	ocation WILLIA	. CAS 10	00-11306	198	RING, SNAP	0.0	0.0 0	0.				
Primary Contact: DOGG, ROWDY (800) 766-4642 State: 24	D F	False 🗹 I	ocation WILLIA	. CAS 10	00-1375 3	198	RING, SNAP	0.0	2.0 0	0.				
	t U F	False 🗹 I	ocation WILLIA	. CAS 10	00-16112	198	RING, SNAP	0.0	0.0 0	0.				
Show Customer Inform 1 (9)	⊕U F	False 🗹 I	ocation WILLIA	. CAS 10	00-16150	198	RING, SNAP	0.0	0.0 0	0.				
Item Number (Ctrl-N): 100- (F2-Find Customer ) (F3-Add Misc. ) (F4-Item F5-Apply Core Credits	)	False 🗹 I	ocation WILLIA	. CAS 10	00-16175	198	RING, SNAP	0.0	0.0 0	0.				
Ass Associations Type I tem Number Description Bin Quantity		False 🗹 I	ocation WILLIA	. CAS 10	00-1675	198	RING, SNAP	0.0	0.0 0	0.				
Part			WILLIA	. CAS 10	00-1087	190	RING, SNAP	0.0		. ▼				
▶ □         D         Item         100-2587-198         RING, SNAP         FE 100	1								164.00 0.	.00				
Dartial Itom Number										•				
Partial Item Number	[Inactive] =	= 'False'							Edit Fi	ilter				
Associators       Type       Ten Nuño       Descriptor       Bin       Quintity       U       rake       Walkhin       CdS       Diversity       Sto       TRNG, StoP       0.0       <														
File       View       Company       Customer       Notes Receivable       CRM       Suppliers       Employees       Payr         RIMSS       WinNetStar       POS Document - 244180       X         File       Save       Save and New       Save and Close       Print       Convert to Invoice       Credit Cards       Cap         Image: Sales Order       Print History       Wholegoods       Document Register       Document Register       Document Register         Document Type:       Sales Order       Document #:       244180       Invoice #:       0         Status:       Open       Customer PO#:       Image: Sales and Shipping Information       Salesman:       LEE CF         Internal Memo:       Customer Address and Shipping Information       Ship To       Shipping Method:         Customer Name and Address       Ship To       Shipping Method:       Shipping Method:         Address 1:       2710 TREBLE CREEK       Image: Sales 1:       Address 1:         Address 2:       Attention:       Address 1:       Address 1:         City:       SAN ANTONIO       State:       TX       Zip Code:       78258         Primary Contact:       DOGS, ROWDY (200) 766-4642       After entering at least 1 Ito to asssign a Sales Order 3: <td>roll Banking Fi iture Signature U ster Detail Order S Doc. HESNUT CC A 2/24/2017 em number p # to your door</td> <td>ixed Assets Inventor</td> <td>V Service Who Show Open Docu er Master V Project # Sub Proje</td> <td>legoods Lea ments :: ect #:</td> <td>ise Renta</td> <td></td> <td></td> <td></td> <td></td> <td></td>	roll Banking Fi iture Signature U ster Detail Order S Doc. HESNUT CC A 2/24/2017 em number p # to your door	ixed Assets Inventor	V Service Who Show Open Docu er Master V Project # Sub Proje	legoods Lea ments :: ect #:	ise Renta									
File       View       Company       Customer       Notes Receivable       CRM       Suppliers       Employees       Payr         RIMSS       WinNetStar       POS Document - 244180       Image: Convert to Invoice       Credit Cards       Cap         File       Save       Save and New       Save and Close       Print       Convert to Invoice       Credit Cards       Cap         Image: Save       Sales       Obcuments       Print History       Wholegoods       Document Register       Docuster       Docus	roll Banking Fi ture Signature U ster Detail Order S TOC. 4 TOC. 4	ixed Assets Inventor	Service Who Show Open Docu er Master Project # Sub Proje	legoods Lea	ise Renta									
File       View       Company       Customer       Notes Receivable       CRM       Suppliers       Employees       Payr         RIMSS       WinNetStar       POS Document - 244180       Image: Convert to Invoice       Credit Cards       Cap         File       Save       Save and New       Save and Close       Print       Convert to Invoice       Credit Cards       Cap         Image: Convert of Invoice       Sales of the convert History       Wholegoods       Document Register       Docutoment Register       Docutoter </td <td>roll Banking Fi ture Signature U ster Detail Order S Doc. HESNUT CC A 2/24/2017 em number p # to your door (Core Credits) Quantity</td> <td>ixed Assets Inventor</td> <td>Service Who     Show Open Docu er Master     Project #     Sub Proje     Sub Proje     F10-Apply     Discount     Amount</td> <td>legoods Lea</td> <td>Discount</td> <td></td> <td></td> <td></td> <td></td> <td></td>	roll Banking Fi ture Signature U ster Detail Order S Doc. HESNUT CC A 2/24/2017 em number p # to your door (Core Credits) Quantity	ixed Assets Inventor	Service Who     Show Open Docu er Master     Project #     Sub Proje     Sub Proje     F10-Apply     Discount     Amount	legoods Lea	Discount									
File       View       Company       Customer       Notes Receivable       CRM       Suppliers       Employees       Payr         RIMSS       WinNetStar       POS Document - 244180       Image: Convert to Invoice       Credit Cards       Cap         File       Save       Save and New       Save and Close       Print       Convert to Invoice       Credit Cards       Cap         Image: Convert Type:       Sales       Other       Document #:       244180       Invoice #:       0         Status:       Open       Customer PO#:       Image: Sales       Salesman:       LEE CP         Internal Memo:       Customer Name and Address       Shipping Information       Ship To       Shipping Method:         Address 1:       2710 TREBLE CREEK       Ship       Ship To       Shipping Method:         Address 2:       Address 1:       Address 1:       Address 1:         Attention:       Tx       Zip Code:       78258         Primary Contact:       DOGG, ROWDY (800) 766-4642       Show Customer Information (F9)         Item Number (Ctrl-N):       F2-Find       Charges       F4-Item         Ass       Associations       Type       Item Number       Description       Bin         Part       D	roll Banking Fi ture Signature U ster Detail Order S Doc. HESNUT CC A 2/24/2017 em number p # to your door (Core Credits) Quantity 100 1.00	ixed Assets Inventor	Service Who     Show Open Docu er Master     Project #     Sub Proje     F10-Apply Discount     Amount     410     \$1.410	legoods Lea	Ise Renta									

#### **Selling Items with Core Charge**

When an Item is sold and has a Core Charge, the Core Charge is billed at the time. If the customer brings in their "dirty core" you may issue them the Core Credit at that time by pressing the F5-Apply Core Credits as shown below.



#### **Core Credits Applied**

2	now Cus	tomer Informa	tion (F9)														
I	tem Num	ber (Ctrl-N):		F. Cu	2-Find stomer F3-Add Misc. Charges Search	m F5 Core	i-Apply Credits			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																
>	+	D	Item	100-2587-198	RING, SNAP	FE 100	1.0000	\$1.48		\$1.410		0.00 %	\$0.11	\$1.52	NC MAR	0.0	0.0000
	÷	D	Item	100-1375-198	RING, SNAP	FE 100	2.0000	\$4.76	\$4.550	\$9.100	\$9.10	0.00 %	\$0.75	\$9.85	NC MAR	0.0	0.0000
	$\pm$		Item	1338269C1-198	GUARD	FE 133	1.0000	\$21.95	\$20.970	\$20.970	\$20.97	0.00 %	\$1.73	\$22.70	NC MAR	0.0	0.0000
	$\pm$	D	Item	103807A1R-198	REMAN-ALTERNATOR	B-30	2.0000	\$209.44	\$200.090	\$400.180	\$400.18	0.00 %	\$33.01	\$433.19	NC MAR	0.0	0.0000
	$\pm$		Core Chrg.	103807A1R-198	REMAN-ALTERNATOR (Core Cha	B-30	2.0000	\$42.00	\$42.000	\$84.000	\$84.00	0.00 %	\$6.93	\$90.93	NC MAR	0.0	0.0000
	÷		Core Ret.	103807A1R-198	REMAN-ALTERNATOR (Core Ret		-2.0000	\$42.00	\$42.000	(\$84.000)	(\$84.00)	0.00 %	\$0.00	(\$84.00)	NC MAR	0.0	0.0000

### Entering Miscellaneous Charges (Freight, Outside Labor or other non-Inventory items)

The Miscellaneous Charges are setup as needed and apply to each location (if multi-location dealer). Depending on the Miscellaneous Charge setup, they can have a "fixed amount" for the selling price or you will enter the selling price

RIMSS WinNetStar         POS Document - 244184         Image: Constraint - 244184         Image: Constra	<b>s</b> Capture Si	Miscellaneous Charges	#2 The Mis	#1 F3-Add Miso scellaneous Char	c. Charges rges Window	/ will open			X
General         Attachments         Print History         Wholegoods         Document Register         Docu           Document Type:         Sales Order         Document #:         244184         Invoice #	ent Register De	Short Name Lo	#3 Search for the M #4 Double	lisc Charge here click to add the	by typing a p line to the Sa	portion of the name ales Order		Capture Cost	Margin
Status: Open Customer PO#: ···· Salesmar Internal Memo: Printed Memo	LEE CHESNUT	Outside Parts	Т	0.00	0.00 %	0.00	0.00		0.00 %
Customer Address and Shipping Information (Ctrl-F9)	1	Outside Labor After Hours Parts Fee	N N	0.00 35.00	0.00 %	0.00	0.00		0.00 %
Customer Name and Address Shipping Information Name: GOLDEN RETREIVER FARMS Shipping Shipping	4etbod:	Bulk Antifreeze Bulk Freon	т Т	0.00	0.00 %	0.00	0.00		0.00 %
Address 1: 2710 TREBLE CREEK ···· Shipmen Address 2: Ardress	Date: 2/28/:	Bulk Lube Bulk Oil	T T	0.00	0.00 %	0.00	0.00		0.00 %
Attention: Address	2:	Document Fee - Ag Sales Document Fee - Truck Sales	N	0.00	0.00 %	0.00	0.00		0.00 %
State: TX Zip Code: 78258 dty:		Freight - Parts	N	0.00	0.00 %	0.00	0.00		0.00 %
Show Customer Toformation (EQ)		Mileage - Service	N	0.00	0.00 %	0.00	0.00		0.00 %
Item Number (Ctrl-N): F3-Add Misc.	4-Item F	Road Call - Service	N	0.00	0.00 %	0.00	0.00		0.00 %
Ass Associations Type Item Number Description	Bin	Road Call - Tire Shop Supplies - B/S	N T	0.00	0.00 %	0.00	0.00		0.00 %
Part         D         Item         100-2587-198         RING, SNAP	FE 100						_		

### **Example of selling Freight**

Customer Addre	ess and Shipping In	formation (Ctrl-F9	)																				
Customer Name	e and Address			Shipping Infor	mation																		
Name:	GOLDEN RETREI	VER FARMS	•••	Ship To	Shipping Method:																		
Address 1:	2710 TREBLE CR	EEK	•••		Shipment Date:	2/28/201	7		•														
Address 2:					Address 1:				•••														
Attention:					Address 2:																		
City:	SAN ANTONIO				Attention:																		
State:	TX Zip	Code: 78	258		City:	I '	Enter Sell	ing Pric	ce here														
Primary Contact:	DOGG, ROWDY (	(800) 766-4642			State:	_	Zip Code:																
Show Customer	Information (F9)																						
Item Number (C	trl-N):		F2-Find Custom	d er F3-Add M Charge	lisc. Is F4-Item Search	F5-A Core C	pply redits			F10-Apply Discount	)												
Ass Asso Part	ciations Type	Item Number	De	escription	Bi	n Q	uantity	List Price	Price	Amount	Subtotal	Discount	Sales Tax	Total	Tax Group	Back Order	Drop Ship	Quantity Sold S	itatus s	SO#	Weigh	t Extended Weight	Item Serial Number
± D	Item	100-2587-198	RI	NG, SNAP	FE	100	1.0000	\$1.48	\$1.410	\$1.410	\$1.41	0.00 %	\$0.11	\$1.52	NC MAR	0.0		0.0000	Open		0 0.0	1 0.01	
<i>0</i> . 😐	Misc.	Freight - Parts					1.0000	\$0.00	\$10.000	\$10.000	\$10.00	0.00 %	\$0.00	\$10.00	NC MAR	0.0		0.0000	Open		0 0.0	0 0.00	

# Entering a text line/comment to print on the Invoice

	bo and ompping into																	
Customer Name	and Address			Shipping Infor	rmation													
Name:	GOLDEN RETREIVE	R FARMS		Ship To	Shipping Method	d:			•									
Address 1:	2710 TREBLE CREE	K	•••		Shipment Date:	2/28/2	017		•									
Address 2:					Address 1:				•••									
Attention:	ention: (: SAN ANTONIO				Address 2:													
City:	/: SAN ANTONIO				Attention:													
State:	y: SAN ANTONIO te: TX Zip Code: 78258																	
Primary Contact:	DOGG, ROWDY (80	00) 766-4642			Noteboo	sign to ok wind	dow											
Show Customer I	Information (F9)					_												
Item Number (Ctr	rl-N):		F2-f Custe	Find omer F3-Add M Charge	fisc. Es F4-Item Search	F: Core	5-Apply e Credits			F10-Apply Discount	)							
Ass Associ Part	iations Type	Item Number	r	Description	E	Bin	Quantity	List Price	Price	Amount	Subtotal	Discount	Sales Tax	Total	Tax Group	Back Order	Drop Ship	Quantity Sold
÷ D	Item	100-2587-19	98	RING, SNAP	F	FE 100	1.0000	\$1.48	\$1.410	\$1.410	\$1.41	0.00 %	\$0.11	\$1.52	NC MAR	0.0		0.0000
> 🖶 🥌	Misc.	Freight - Par	rts				1.0000	\$0.00	\$10.000	\$10.000	\$10.00	0.00 %	\$0.00	\$10.00	NC MAR	0.0		0.0000

Customer Addre	ss and Shipping Infor	rmation (Ctrl-F9)															
Customer Name	and Address		Shi	pping Inform	nation												
Name: Address 1: Address 2: Attention: City: State: Primary Contact:	GOLDEN RETREIVE 2710 TREBLE CREE SAN ANTONIO TX Zip C DOGG, ROWDY (80	R FARMS		Ship To	Shipping Method: Shipment Date: Address 1: Address 2: Attention: City: State:	2/28/2017	Zip Code:										
Show Customer	Information (F9)			_													
Item Number (Ct	rl-N):		F2-Find Customer	#1	Check mark	if Note i	is to be pr	inted or	Sales (	Order / Invoi	ce						
Ass Assoc Part	iations Type	Item Number	Descripti	ic		#2 Ente	er the text	to be p	inted			Discount	Sales Tax	Total	Tax Group	Back Order	Drop Ship
🗄 D	Item	100-2587-198	RING, SI						-	-		0.00 %	\$0.11	\$1.52	NC MAR	0.0	
> 🗆	Misc.	Freight - Parts					1.0000	\$0.00	\$10.000	\$10.000	\$10.00	0.00 %	\$0.00	\$10.00	NC MAR	0.0	
Notebo	ok Pricing																
Q Date	Entered Entered B	y Print On Invoice	Note														
> 2/28	/2017 leerimss		ENTER YOU AS NEEDED	JR TEXT / CO	OMMENT HERE - YOU	J MAY ENTER	AS MUCH INFO	ORMATION									
*																	

# Converting Sales Order to Invoice to collect payment

File View	/ Company	Custom	er Notes Receivabl	e CRM Supplie	rs Employees	Payroll	Banking Fixed	Assets I	nventory S	Service Who	olegoods Lea	ise Rental	Repo
RIMSS Winf	NetStar POS	Document -	244180 🛞										
File Sav	e Save and	New Sav	e and Close Print	Convert to Invoice	e Credit Cards	Capture S	ignature <b>Upda</b>	ate Line Iten	n Data Sho	ow Open Doci	uments		
Genera	Attad	hments P	rint History Wholego	oods Documen Re	gister Docume	nt Register De	tail Order Stat	us Report	Customer M	aster			
Document	Type: Sales C	Order	Document #: 244	180	Invoice #:	0	Docume	nt Date: 2/	24/2017	Project a	#:		
S	tatus: Open		Customer PO#:		Salesman:	LEE CHESNU	T CC Auth	n. #:		Sub Proj	ect #:		
Internal M	lemo:				Printed Memo:								
Customer	Address and S	hipping Info	rmation (Ctrl-F9)										
Custome	r Name and Ad	dress		Shipping I	Information								
Name:	GOLDE		R FARMS		Shipping Me	ethod:							
Address 1	: 27101	REBLE CREE	к -		hipment D	ate: 2/24/	2017		-				
Address 2	:				N.	-1-1			1				
Attention					Select C	Convert t	to Invoice						
City:	SAN A	NTONIO		-									
State:	TX	Zip C	ode: 78258	***	Note - Doo	cument l	ype will ci	nange					
Primary C	ontact: DOGG	, ROWDY (80	00) 766-4642		to	Invoice	***						
Show Cus	tomer Informat	tion (F9)											
Item Num	ber (Ctrl-N):			F2-Find Customer	dd Misc. F4- arges Sea	Item arch Co	-5-Apply re Credits			F10-Apply Discount	)		
Ass Part	Associations	Туре	Item Number	Description		Bin	Quantity	List Price	Price	Amount	Subtotal	Discount	Sales 1
> 🗄	D	Item	100-2587-198	RING, SNAP		FE 100	1.0000	\$1.48	\$1.410	\$1.410	\$1.41	0.00 %	\$C
$\pm$	D	Item	100-1375-198	RING, SNAP		FE 100	2.0000	\$4.76	\$4.550	\$9.100	\$9.10	0.00 %	\$0
$\pm$		Item	1338269C1-198	GUARD		FE 133	1.0000	\$21.95	\$20.970	\$20.970	\$20.97	0.00 %	\$1
+	D	Item	103807A1R-198	REMAN-ALTER	NATOR	B-30	2.0000	\$209.44	\$200.090	\$400.180	\$400.18	0.00 %	\$33
+		Core Chrg.	103807A1R-198	REMAN-ALTER	NATOR (Core Cha	B-30	2.0000	\$42.00	\$42.000	\$84.000	\$84.00	0.00 %	\$6
÷		Core Ret.	103807A1R-198	REMAN-ALTERI	NATOR (Core Ret		-2.0000	\$42.00	\$42.000	(\$84.000)	(\$84.00)	0.00 %	\$0

# Collecting Payment / Settlement Process

File View Company Customer Notes Receivable	CRM Suppliers Employees	Payroll B	Banking Fixed	Assets In	ventory Se	ervice Whole	egoods Leas	e Rental	Reports	Web Links	Window	vs
RIMSS WinNetStar New Invoice 🛞	Settlement											
le Save Save and New Save and Close Print Credit Cards Update Line Item Data Show Open Documents							Taxable	Non-Tax.	Tota	I		
General Attachments Print History Wholegood	Register Det	egister Detail Order Status Report			SubTotal	\$431.66	\$0.00	\$43	1.66			
Document Type: Invoice Document #: 0	Invoice #: 0	Document Date: 1				Tax	\$35.60	+0.00	\$3	5.60		F
Status: Open Customer PO#:	Doen Qustomer PQ#: Salesman: LEE CHESNUT V CC Auth. #:						\$467.26	\$0.00	) \$46.	7.26		
Internal Memo:	Printed Memo:					Cash		\$467.26				
Customer Address and Shipping Information (Ctrl-E9)						Check 🔍		\$0.00 Ch	eck #			
Customer Name and Address Shinoing Information				-	Cre	dit Card	L	\$0.00 CC	Туре		•	
				_	Contra	ct in Transit	<u> </u>	\$0.00 Ref	ference			
Address 1: 2710 TREBLE CREEK				-	Sales Or	ler Deposit		\$0.00				
Address 2:	#1 F6 - Collect Payment					Other \$0.00 Reference						
Attention:	on: #2 Click/Select Payment Type											
City: SAN ANTONIO	SAN ANTONIO #3 F8 - Save and Print Receipt				- Total \$467.26							
State: TX Zip Code: 78258					Change		φu				_	
Primary Contact: DOGG, ROWDY (800) 766-4642 Code:					F8 - Save and Print Receipt							
Show Customer Information (F9)					F9 - Cancel							
E2 End E2 Add Mine E4 Them EE Annly E6 Collect					F10 - Capture Electronic Signature							
Item Number (Ctrl-N):												
Ass Associations Type Item Number	Description	Bin	Quantity	List Price								Ba
Part		FF 400	1 0000	41.40	tr. 110	tu 110		0.00.04	to 11	A4 50		
Image: bit with the second s	RING, SNAP	FE 100	1.0000	\$1.48	\$1.410	\$1.410 ¢0.100	\$1.41 ¢0.10	0.00 %	\$0.11 ¢0.75	\$1.52	NC MAR	
U Item 100-13/5-198		FE 100	2.0000	\$4.70	\$4.550	\$9.100	\$9.10	0.00 %	\$0.75	\$9.85	NC MAR	-
D     Item 10380701P-198		PE 155 B-30	2,0000	\$21.95	\$20.970	\$20.970	\$20.97	0.00 %	\$1.75	\$22.70	NC MAR	-
B Core Chra. 103807A1R-198	REMAN-ALTERNATOR (Core Cha	B-30	2,0000	\$42.00	\$42,000	\$84.000	\$84.00	0.00 %	\$6,93	\$90,93	NC MAR	-
(e) Core Ret. 103807A1R-198	REMAN-ALTERNATOR (Core Ret		-2.0000	\$42.00	\$42.000	(\$84.000)	(\$84.00)	0.00 %	(\$6.93)	(\$90.93)	NC MAR	