



Selling a Wholegood

Software Development
RIMSS Business Systems Technology

Company Confidential

Copyright ©1983-2017 RIMSS Business Systems Technology

Revised 02/09/2017

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

Selling a Wholegood from Inventory

A Wholegood is sold from Wholegood Inventory using a Wholegood Invoice. A Wholegood Invoice can be created from scratch, or can be converted from a Wholegood Estimate or Wholegood Sales Order.

Use a Wholegood Estimate as a quote to a Customer.

Use a Wholegood Sales Order to reserve the Wholegood for a customer (i.e. when a Wholegood is placed on a Sales Order, it cannot be placed on any other sales document. The sales order can be converted to a Wholegood Invoice when ready to settle the transaction.

Use a Wholegood Invoice directly to sell the unit from the Wholegood Inventory.

A Wholegood Estimate can convert to a Wholegood Sales Order, or a Wholegood Estimate can convert directly to a Wholegood Invoice.

A Wholegood Sales order can convert to a Wholegood Invoice.

The Wholegood Invoice will remove the Wholegood unit from inventory.

New ▶

Find ▶

Support Lists ▶

1905 Wholegood Ctrl+W

1910 Customer

1915 WG Estimate

1920 WG Sales Order

1925 WG Invoice

1930 WG Transfer

1935 WG Journal

To sell a Wholegood go to:

Wholegood > New > WG Sales Order



RIMSS WinNetStar
Advanced Enterprise System

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 Wholegood Sales Order

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

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: 1/31/2017 Project #: ...

Status: Open Customer PO#: ... Salesman: MICHELLE LE... CC Auth. #: ... Sub Project #: ...

Internal Memo: ... Printed Memo: ...

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address

Name: ALBOR INDUSTRIES ...

Address 1: 2710 TREBLE CREEK ...

Address 2: ...

City: SAN ANTONIO

State: TX Zip Code: 78258

Primary Contact: ALBOR, CARL (210) 555-1212

Shipping Information

☐ Ship To Shipping Method: ...

Shipment Date: 1/31/2017

Address 1: ...

Address 2: ...

Attention: ...

City: ...

State: ... Zip Code: ...

Hide Customer Information (F9)

Item Number (Ctrl-N): ...

F2-Find Customer F3-Add Misc. Chrgs F4-Item Search F5-Apply Core Crdts F6-Add Wholegood F7-Add Trade-In F10-Apply Discount

Ass...	Associat...	Type	Item Number	Descri...	Bin	New/Used	Quantit	List Price	Price	Amount	Disco...	Subtotal	Tax Group	Total	Back Order	BO/DS...	BO/DS Tax	BC

Available Items and Taxable Non-Taxable

Sub Total \$0.00 \$0.00

Tax \$0.00

Total \$0.00

Tax Group Non-Taxable Rate 0.000 % SubTotal

Customer Deposit

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

Create Deposit Return Deposit

In the Wholegood Sales Order, 1. add your Salesman, 2. add any memos, and 3. lookup and add your Customer.

Once the document header information is added, you can click "F6-Add Wholegood" to add Wholegoods from your inventory to your sales order. Multiple Wholegoods can be added to your order in addition to Parts from inventory "F4-Item Search" and Miscellaneous charges "F3-Add Misc. Chrgs". See the help document on "Trade-In Processing" for details on taking a Trade-In.

Document Type: Sales Order Document #: 0 Invoice #: 0 Document Date: 1/31/2017 Project #:
 Status: Open Customer PO#: Salesman: MICHELLE LE... CC Auth. #: Sub Project #:
 Internal Memo: Printed Memo:

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address
 Name: ALBOR INDUSTRIES
 Address 1: 2710 TREBLE CREEK
 Address 2:
 City: SAN ANTONIO
 State: TX Zip Code: 78258
 Primary Contact: ALBOR, CARL (210) 555-1212

Shipping Information

☐ Ship To

Once a Wholegood has been added to the Sales Order, you will need to enter the selling price in the 'Price' column if it has not already been set up on the Wholegood Master Record. You can now Save the Wholegood Sales Order.

Hide Customer Information (F9)

Item Number (Ctrl-N): F2-Find Customer F3-Add Misc. Chrgs F4-Item Search F5-Apply Core Crdts F6-Add Wholegood F7-Add Trade-In F10-Apply Discount

Ass...	Associati...	Type	Item Number	Descri...	Bin	New/Used	Quantity	List Price	Price	Amount	Disco...	Subtotal	Tax Group	Total	Back Order	BO/DS...	BO/DS Tax	BC
>		Whole...	(351) ON ORDER	Tractor...			1.0000	\$0.00	\$0.00	\$0.00	0.00 %	\$0.00	Non-Taxable	\$0.00	0.0	\$0.00	\$0.00	

	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

Tax Group Non-Taxable Rate 0.000 % SubTotal

Customer Deposit	
Original Deposi	\$0.00
Deposit Applic	\$0.00
Unused Deposi	\$0.00

Create Deposit Return Deposit

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 Wholegood POS Document - 10158

File Save Save and Close Save and New Print **Convert to Invoice** Capture Signature View Accounting Entries Credit Cards Update Line Item Data Show Open Documents Edit Transactions

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

Document Type: Sales Order Document #: 10158 Invoice #: 0 Document Date: 1/31/2017 Project #: ...
Status: Open Customer PO#: ... Salesman: MICHELLE LE... CC Auth. #: Sub Project #:
Internal Memo: Printed Memo:

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address Shipping Information
Name: ALBOR INDUSTRIES
Address 1: 2710 TREBLE CREEK
Address 2:
City: SAN ANTONIO
State: TX Zip Code: 78258
Primary Contact: ALBOR, CARL (210) 555-1212
☐ Ship To

Once the Wholegood Sales Order is saved, a new menu option appears in the header "Convert to Invoice". You can convert the Wholegood Sales Order to a Wholegood Invoice when you are ready to settle.

Hide Customer Information (F9)

Item Number (Ctrl-N): F2-Find Customer F3-Add Misc. Chrgs F4-Item Search F5-Apply Core Crdts F6-Add Wholegood F7-Add Trade-In F10-Apply Discount

Ass...	Associati...	Type	Item Number	Descri...	Bin	New/Used	Quantity	List Price	Price	Amount	Disco...	Subtotal	Tax Group	Total	Back Order	BO/DS...	BO/DS Tax	BC
>		Whole...	(351) ON ORDER	Tractor...			1.0000	\$0.00	\$0.00	\$0.00	0.00 %	\$0.00	Non-Taxable	\$0.00	0.0	\$0.00	\$0.00	

	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

Tax Group Non-Taxable Rate 0.000 % SubTotal

Customer Deposit	
Original Deposi	\$0.00
Deposit Appliec	\$0.00
Unused Deposi	\$0.00

Create Deposit Return Deposit

FileViewCompanyCustomerNotes ReceivableCRMSuppliersEmployeesPayrollBankingFixed AssetsInventoryServiceWholegoodsLeaseRentalReportsWeb LinksWindowsHelp

RIMSS WinNetStarNew Wholegood Invoice

FileSaveSave and CloseSave and NewPrintView Accounting EntriesCredit CardsUpdate Line Item DataShow Open DocumentsEdit Transactions

GeneralAttachmentsPrint HistoryWholegoodsDocument RegisterDocument Register DetailOrder Status ReportCustomer Master

Document Type: InvoiceDocument #: 0Invoice #: 0Document Date: 1/31/2017Project #: ...

Status: OpenCustomer PO#: ...Salesman: MICHELLE LE...CC Auth. #: ...Sub Project #: ...

Internal Memo: ...Printed Memo: ...

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address

Name: ALBOR INDUSTRIESAddress 1: 2710 TREBLE CREEKAddress 2: ...City: SAN ANTONIOState: TXZip Code: 78258Primary Contact: ALBOR, CARL (210) 555-1212

Hide Customer Information (F9)

Item Number (Ctrl-N): ...F2-Find CustomerF3-Add Misc. ChrgsF4-Item SearchF5-Apply Core CrdtsF6-Add WholegoodF7-Add Trade-InF8-Settle InvoiceSettle to GLF10-Apply Discount

Ass...	Associati...	Type	Item Number	Descri...	Bin	New/Used	Quantity	List Price	Price	Amount	Disco...	Subtotal	Tax Group	Total	Back Order	BO/DS...	BO/DS Tax	BC
>		Whole...	(351) ON ORDER	Tractor...			1.0000	\$0.00	\$0.00	\$0.00	0.00 %	\$0.00	Non-Taxable	\$0.00	0.0	\$0.00	\$0.00	

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

Tax Group Non-TaxableRate 0.000 %SubTotal

Customer Deposit

Original Deposi	\$0.00
Deposit Applie	\$0.00
Unused Deposi	\$0.00

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 Wholegood Invoice

File Save Save and Close Save and New Print View Accounting

General Attachments Print History Wholegoods Document Register

Document Type: Invoice Document #: 0
 Status: Open Customer PO#:
 Internal Memo: Printed

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address
 Name: ALBOR INDUSTRIES
 Address 1: 2710 TREBLE CREEK
 Address 2:
 City: SAN ANTONIO
 State: TX Zip Code: 78258
 Primary Contact: ALBOR, CARL (210) 555-1212

Shipping Information
☐ Ship To

Hide Customer Information (F9)

Item Number (Ctrl-N): F2-Find Customer F3-Add Misc. Chrgs

Ass...	Associati...	Type	Item Number	Descri...	Bin
>					

Settlement

	Taxable	Non-Tax.	Total
SubTotal	\$0.00	\$15,000.00	\$15,000.00
Tax	\$0.00		\$0.00
Total	\$0.00	\$15,000.00	\$15,000.00

Cash \$0.00
 Check \$0.00
 Credit Card \$0.00
 Customer Account \$0.00
 Contract in Transit \$15,000.00
 Sales Order Deposit \$0.00
 Other \$0.00

Check #
 CC Type
 Reference
 Reference

Total \$15,000.00
 Change Due \$0.00

F8 - Save and Print Receipt
 F9 - Cancel
 F10 - Capture Electronic Signature

On settling the Wholegood Invoice, you can choose multiple payment types depending on how the customer is paying. If a Customer Deposit was created on the Wholegood Sales Order, the amount of the deposit will show on the "Sales Order Deposit" line and will reduce the amount due by the amount of the deposit.

Once you have applied all appropriate payment types and your Change Due = 0.00, Click on "F8 - Save and Print Receipt" to finalize the settlement and print your Wholegood Invoice for the customer.

Tax Group	Total	Back Order	BO/DS...	BO/DS Tax	BC
	\$0.00			\$0.00	

Customer Deposit
 Total Deposi \$0.00
 Deposit Applied \$0.00
 Unused Deposi \$0.00

Sub Total	Tax	Total
\$0.00	\$0.00	\$15,000.00
\$0.00	\$0.00	\$15,000.00

Tax Group Non-Taxable Rate 0.000 % SubTotal