Kubota IKQ Interface

Import a Wholegood quote

Software Development

RIMSS Business Systems Technology

To find quotes sent to WinNetStar from the IKQ system, navigate to Wholegoods>Find>Kubota Quote. This will open a new tab as seen on the next screen shot.

RIMSS, Inc

	IKQ Quote ID	Date Created String	Salesperson Last Name	Quote Status Code	Customer Company Name	Contact First Name	Contact Last Name	Contact Phone Number 1	Contact Phone Type 1	Email Address	Quote Net Sum After Tax
🔽					Dameon's Garage						
> ⊞	1631	7/14/2017	Leonard 80001	InPrg	Dameon's Garage	Dameon	Kindall	7145551212	Mobile	80001@123.com	16201.56
⊞	1623	7/14/2017	Leonard 80001	InPrg	Dameon's Garage	Dameon	Kindall	7145551212	Mobile	80001@123.com	15562.47

This list will initially open blank. Select a date range and click the Fetch button to retrieve a list of quotes. Use the first row filter to help you find your quote. You may also use the column customization features common throughout WinNetStar to customize your view of this list.

❌ ☑ [Customer Company Name] = 'Dameon"s Garage' And [Quote Net Sum After Tax] > '0' 🔽

A right mouse click on a line in this list will produce the indicated menu options. Selecting the Delete option will delete this quote data from the WinNetStar system but it will not delete it from IKQ. You will still be able to go back to IKQ to edit the quote and resend it to WinNetStar. If you do not delete it here and you resend the same quote from IKQ, the old quote data will be deleted and replaced with the new quote data.

Selecting the Add Wholegood Estimate option will produce a new tab as seen on the next screen shot.

Red highlighted lines will need to be linked to data elements in WinNetStar. This customer was created as a new customer in IKQ as opposed to using the interface to lookup a customer in WinNetStar and therefore is not linked to a Customer Master in WinNetStar. We strongly recommend that you click on the Link to Customer Master button first to look for the customer in the system before selecting the Add New Customer Master option. The Link To option will provide a pop up window where you can search for an existing customer record for linking purposes. If no match is found, you should close the customer search pop up window then click on the Add New Customer Master button.

IKQ ID	DBS ID	Item Type	Item Number	Item Description	Quantity	List Price	Price	Sub Total	Total
1566	0	Wholegood	BX23SLB-R	BX2380V - 4WD TRACTOR WITH R4 TIRES/STANDARD LOADER/BACKHOE	1.0000	$20,325.00	$19,492.01	$19,492.01	$19,492.01
2847	0	Unknown	BX2410	TWO LEVER QUICK COUPLER	1.0000	$432.00	$414.30	$414.30	$414.30
2848	0	Unknown	BX2411	ROD INDICATOR	1.0000	$65.00	$62.34	$62.34	$62.34
2849	0	Unknown	BX2414	BOLT ON CUTTING EDGE	1.0000	$114.00	$109.33	$109.33	$109.33
2850	0	Unknown	BX2415	TWO LEVER Q.A. PALLET FORK FRAME	1.0000	$636.00	$609.93	$609.93	$609.93
2851	0	Unknown	K9184	32" PALLET FORKS	1.0000	$338.00	$324.15	$324.15	$324.15
2852	152	Misc Charge		(152) CRATE DISPOSAL FEE	1.0000	$10.00	$10.00	$10.00	$10.00
2853	258	Misc Charge		(258) FREIGHT - SALES	1.0000	$0.00	$250.25	$250.25	$250.25
2854	23079	Item		(23079) 620-70000-40201 OIL, 1 GAL SUPER UDT2	1.0000	$19.88	$19.88	$19.88	$19.88
2855	25970	Item		(25970) 620-HH150-32430 CARTRIDGE, OIL FILTER *	1.0000	$9.58	$9.58	$9.58	$9.58
0	0	Misc Charge	Incentive	2017 TRACTOR & HAY TOOLS DSI B	1.0000	($100.00)	($100.00)	($100.00)	($100.00)
0	0	Misc Charge	Incentive	2017 GOVERNMENTAL SALES PROGRAM	1.0000	($1,310.43)	($1,310.43)	($1,310.43)	($1,310.43)
1567	272590	Wholegood	272590	(272590) CREATIVE ALLOY - GDEF SVL95	1.0000	$91.00	$91.00	$91.00	$91.00

SUM=19982.34

Each of the red highlighted detail lines will also need to be linked to a corresponding data element in WinNetStar. A right mouse click on a detail line will produce pop up menu with various options. See next screen shot for discussion of the various options.

A right mouse click on a detail line will produce a menu pop up. Based on the item type, the menu may have more or less options. This screen shot illustrates all possible options which are explained below.

Link to Existing Wholegood – select this option if you already have a Wholegood Master Record for this item. The system will produce a pop up search window for your Wholegoods.

Link to Existing Item – select this option if you already have an Item Master Record (parts) for this item. The system will produce a pop up search window for your Inventory Items.

Link to Existing Misc. Charge – select this option to link the item to one of your Miscellaneous Charges. The system will produce a pop up search window for your Miscellaneous Charges.

Create New Wholegood – select this option to create a new Wholegood Master Record for the item. A quick add pop up window will appear. You should review and edit any fields on the pop up before saving the new record.

Attach to Wholegood – select this option if you would like to consolidate lines into one of the Wholegood lines. The various options selected during the Build My Kubota process in IKQ will all come over as detail lines. If you wish to have the dollar value of those items included in the wholegood line you would use this feature. The system will add the dollars to the wholegood line you select and will create a note tied to that wholegood line with the description of the options included in the note. You can consolidate one line at a time, or you can hold the Ctrl key down on your keyboard as you select multiple lines prior to performing your right mouse click and selecting the Attach to Wholegood option.

Delete – select this option to delete a line from your quote.

This screen shot illustrates the Attach to Wholegood option. The user has done a multi-select of the blue lines then performed a right mouse click and selected the Attach to Wholegood option. The pop up window displays the wholegood lines included on the document for the user to double click their selection for consolidation. Only those wholegoods that have been linked to a WinNetStar data record will display in this pop up. See next screen shot.

After selecting the Wholegood from the pop up in the previous screen shot, the dollar values from the selected lines have now been included in the Wholegood Line selected. Note that all blue selected lines show zero values and the first Wholegood line now includes those amounts.

Now that all red highlighted lines have been addressed, the user can select the menu option to Create Wholegood Estimate in the top left portion of the screen. See next screen shot.

	IKQ ID	DBS ID	Item Type	Item Number	Item Description	Quantity	List Price	Price	Sub Total	Total
	1564	274246	Wholegood	BX23SLB-T	BX23SLB-T - 4WD TRACTOR WITH R3 TIRES/STANDARD LOADER/BACKHOE	1.0000	$20,760.00	$19,864.11	$19,864.11	$19,864.11
	2838	0	Note	BX2410	TWO LEVER QUICK COUPLER	1.0000	$0.00	$0.00	$0.00	$0.00
	2839	0	Note	BX2411	ROD INDICATOR	1.0000	$0.00	$0.00	$0.00	$0.00
>	2840	0	Note	BX2414	BOLT ON CUTTING EDGE	1.0000	$0.00	$0.00	$0.00	$0.00
	2841	0	Note	BX2415	TWO LEVER Q.A. PALLET FORK FRAME	1.0000	$0.00	$0.00	$0.00	$0.00
	2842	0	Note	K9184	32" PALLET FORKS	1.0000	$0.00	$0.00	$0.00	$0.00
	2843	23079	Item		(23079) 620-70000-40201 OIL, 1 GAL SUPER UDT2	1.0000	$19.88	$19.88	$19.88	$19.88
	2844	25970	Item		(25970) 620-HH150-32430 CARTRIDGE, OIL FILTER *	1.0000	$9.58	$9.58	$9.58	$9.58
	2845	258	Misc Charge		(258) FREIGHT - SALES	1.0000	$0.00	$525.53	$525.53	$525.53
	2846	152	Misc Charge		(152) CRATE DISPOSAL FEE	1.0000	$10.00	$10.00	$10.00	$10.00
	0	0	Note	Incentive	2017 CUSTOMER INSTANT REBATE	1.0000	$0.00	$0.00	$0.00	$0.00
	0	0	Note	Incentive	2017 TRACTOR & HAY TOOLS DSI	1.0000	$0.00	$0.00	$0.00	$0.00
	1565	272593	Wholegood	272593	(272593) CREATIVE ALLOY - GDEF SVL95	1.0000	$91.00	$91.00	$91.00	$91.00

The system has now created a new tab for your Wholegood Estimate. It has not yet been saved. When you save this document, the system will delete the IKQ data imported from that system. However, if you wish, you can always go back into IKQ and send the quote data back over to WinNetStar.