



## **Kubota IKQ Interface**

### **Import a Wholegood quote**

Software Development  
RIMSS Business Systems Technology

Company Confidential  
Copyright ©1983-2020 RIMSS Business Systems Technology




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

**RIMSS, Inc**



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 WinNetStar **Kubota Quote** 

Period	Custom Date Range		
Last 60 Days 	From: 5/20/2017 	To: 7/19/2017 	Fetch

Drag a column header here to group by that column

	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 Type1	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' 

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

RMSS WinNetStar
Kubota Quote
IKQ Quote Add - 1773
Wholegood Master List

Period
Custom Date Range
Today
From: 7/19/2017
To: 7/19/2017
Fetch

Drag a column header here to group by that column

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
1774										
1774	7/19/2017	Jones	InPrg	Alliance Capital, LLC	Jason		254-1212	Mobile	jt@yahoo.com	22500.25

Add Wholegood Estimate
Delete

[Quote Net Sum After Tax] > '0' And Starts with([IKQ Quote ID], '1774')
Edit Filter

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.

Customer Name and Address		Shipping Information	
Name:	Alliance Capital, LLC	Address 1:	125 SOUTH MAIN
Address 1:	125 SOUTH MAIN	Address 2:	
Address 2:		City:	Austin
City:	Austin	State:	TX
State:	TX	Zip Code:	78558
Primary Contact:	Jason Trinity		

Link To Customer Master

Add New Customer Master

Drag a column header here to group by that column

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

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.

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.

SUM=19982.34

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 Kubota Quote IKQ Quote Add - 1773

Create and Save Wholegood Estimate Save and Finish Later Delete Changes

Customer Name and Address

Name: DALE TEAGUE  
 Address 1: 90 Brooks Crossing  
 Address 2:  
 City: Boerne  
 State: TX Zip Code: 78006  
 Primary Contact: DALE TEAGUE

Shipping Information

Address 1: 90 Brooks Crossing  
 Address 2:  
 City: Boerne  
 State: TX Zip Code: 78006

Drag a column header here to group by that column

IKQ ID	DBS ID	Item Type	Item Number	Item Descri...	Quantity	List Price	Price	Sub Total	Total
1564	0	Wholegood	BX23SLB-T	BX23SLB-T ...	1.0000	\$20,275.00	\$19,444.06	\$19,444.06	\$19,444.06
2838	0	Unknown	BX2410	TWO LEVE...	1.0000	\$432.00	\$414.30	\$414.30	\$414.30
2839	0	Unknown			0.0000	\$65.00	\$62.34	\$62.34	\$62.34
2840	0	Unknown			0.0000	\$114.00	\$109.33	\$109.33	\$109.33
2841	0	Unknown			0.0000	\$535.00	\$609.93	\$609.93	\$609.93
2842	0	Unknown			0.0000	\$338.00	\$324.15	\$324.15	\$324.15
2843	23079	Item			0.0000	\$19.88	\$19.88	\$19.88	\$19.88
2844	25970	Item			0.0000	\$9.58	\$9.58	\$9.58	\$9.58
2845	258	Misc Charge			0.0000	\$0.00	\$525.53	\$525.53	\$525.53
2846	152	Misc Charge		(152) CRA...	1.0000	\$10.00	\$10.00	\$10.00	\$10.00
0	0	Misc Charge	Incentive	2017 CUST...	1.0000	(\$1,000.00)	(\$1,000.00)	(\$1,000.00)	(\$1,000.00)
0	0	Misc Charge	Incentive	2017 TRAC...	1.0000	(\$100.00)	(\$100.00)	(\$100.00)	(\$100.00)
1565	272593	Wholegood	272593	(272593) C...	1.0000	\$91.00	\$91.00	\$91.00	\$91.00

Link to Existing Wholegood  
 Link to Existing Item  
 Link to Existing Misc. Charge  
 Create New Wholegood  
 Attach to Wholegood  
 Delete

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.

Customer Name and Address		Shipping Information	
Name:	DALE TEAGUE	Address 1:	90 Brooks Crossing
Address 1:	90 Brooks Crossing	Address 2:	90 Brooks Crossing
Address 2:	-	City:	Boerne
City:	Boerne	State:	TX Zip Code: 78006
State:	TX Zip Code: 78006	Primary Contact:	DALE TEAGUE
<a href="#">Link To Customer Master</a> <a href="#">Add New Customer Master</a>			

Drag a column header here to group by that column

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	\$20,275.00	\$19,444.06	\$19,444.06	\$19,444.06
2838	0	Unknown	BX2410	TWO LEVER QUICK COUPLER	1.0000	\$432.00	\$414.30	\$414.30	\$414.30
2839	0	Unknown	BX2411	ROD INDICATOR	1.0000	\$65.00	\$62.34	\$62.34	\$62.34
2840	0	Unknown	BX2414	BOLT ON CUTTING EDGE	1.0000	\$114.00	\$109.33	\$109.33	\$109.33
2841	0	Unknown	BX2415	TWO LEVER Q.A. PALLET FORK FRAME	1.0000	\$636.00	\$609.93	\$609.93	\$609.93
2842	0	Unknown	K9184	32" PALLET FORKS	1.0000	\$338.00	\$324.15	\$324.15	\$324.15
2843	23079	Item					\$19.88	\$19.88	\$19.88
2844	25970	Item					\$9.58	\$9.58	\$9.58
2845	258	Misc Charge					\$525.53	\$525.53	\$525.53
2846	152	Misc Charge					\$10.00	\$10.00	\$10.00
0	0	Misc Charge	Incentive				(\$1,000.00)	(\$1,000.00)	(\$1,000.00)
0	0	Misc Charge	Incentive				(\$100.00)	(\$100.00)	(\$100.00)
1565	272593	Wholegood	272593				\$91.00	\$91.00	\$91.00

Select Wholegood

Drag a column header here to group by that column

Wholegood ID	Item Type	Item Number	Item Description
274246	Wholegood	BX23SLB-T	BX23SLB-T - 4WD TRAC...
272593	Wholegood	272593	(272593) CREATIVE AL...

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.

RIMSS WinNetStar Kubota Quote IKQ Quote Add - 1773

Create and Save Wholegood Estimate Save and Finish Later Delete Cha

Customer Name and Address

Name: DALE TEAGUE

Address 1: 90 Brooks Crossing

Address 2:

City: Boerne

State: TX Zip Code: 78006

Primary Contact: DALE TEAGUE

Link To Customer Master

Add New Customer Master

Drag a column header here to group by that column

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

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.



FileViewCompanyCustomerNotes ReceivableCRMSuppliersEmployeesPayrollBankingFixed AssetsInventoryServiceWholegoodsLeaseRentalReportsWeb LinksWindowsHelp

RIMSS WinNetStarKubota QuoteNew Wholegood Estimate

FileSaveSave and CloseSave and NewPrintCapture SignatureCredit CardsUpdate Line Item DataShow Open DocumentsEdit Transactions

GeneralAttachmentsPrint HistoryWholegoodsDocument RegisterDocument Register DetailOrder Status ReportCustomer Master

Document Type: EstimateDocument #: 0Invoice #: 0Document Date: 7/19/2017Project #:   
Status: OpenCustomer PO #:Salesman:CC Auth. #:Sub Project #:   
Internal Memo:Printed Memo:

Customer Address and Shipping Information (Ctrl-F9)  
Customer Name and AddressShipping Information  
Name: DALE TEAGUEAddress 1: 90 Brooks CrossingAddress 2:BoerneCity: TXZip Code: 78006Primary Contact: TEAGUE, DALE (210) 5577471  
☐ Ship ToShipping Method:7/19/2017Shipment Date:90 Brooks CrossingAddress 1:90 Brooks CrossingAddress 2:BoerneCity: TXZip Code: 78006

Hide Customer Information (F9)  
Item Number (Ctrl-N):F2-Find CustomerF3-Add Misc. ChgsF4-Item SearchF6-Add WholegoodF7-Add Trade-InF10-Apply Discount

Ass...	Type	Item Number	Description	Quantity	List Price	Price	Amount	Discount	Subtotal	Tax Group	Total	Cost	Extended Avg Cost	Gross Profit	GP %
>	Wholegood	(274246)	BX23SLB-T - 4WD TRACTOR WITH R3 TIRES/STANDAR...	1.0000	\$0.00	\$19,864.11	\$19,864.11	0.00 %	\$19,864.11	8.25% FT WOR...	\$19,864.11	\$0.00	\$0.00	\$19,864.11	100.00 %
	Item	70000-40201-620	OIL, 1 GAL SUPER LDT2	1.0000	\$19.88	\$19.88	\$19.88	0.00 %	\$19.88	8.25% FT WOR...	\$19.88	\$13.86	\$13.86	\$6.02	30.29 %
	Item	HH150-32430-620	CARTRIDGE, OIL FILTER *	1.0000	\$9.58	\$9.58	\$9.58	0.00 %	\$9.58	8.25% FT WOR...	\$9.58	\$5.59	\$5.59	\$3.99	41.68 %
	Misc.	FREIGHT - SALES		1.0000	\$0.00	\$0.00	\$0.00	0.00 %	\$0.00	8.25% FT WOR...	\$0.00	\$0.00	\$0.00	\$0.00	0.00 %
	Misc.	CRATE DISPOSAL FEE		1.0000	\$10.00	\$10.00	\$10.00	0.00 %	\$10.00	8.25% FT WOR...	\$10.00	\$0.00	\$0.00	\$10.00	100.00 %
	Wholegood	(272593) CREATIVE ALLOY	GDEF SVL95 (SN: DEF GUARD)	1.0000	\$91.00	\$91.00	\$91.00	0.00 %	\$91.00	8.25% FT WOR...	\$91.00	\$78.72	\$78.72	\$12.28	13.49 %

\$98.17\$19,896.40

	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	\$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 8.25% FT WORTH TAXRate 8.250 %SubTotal

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

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.