

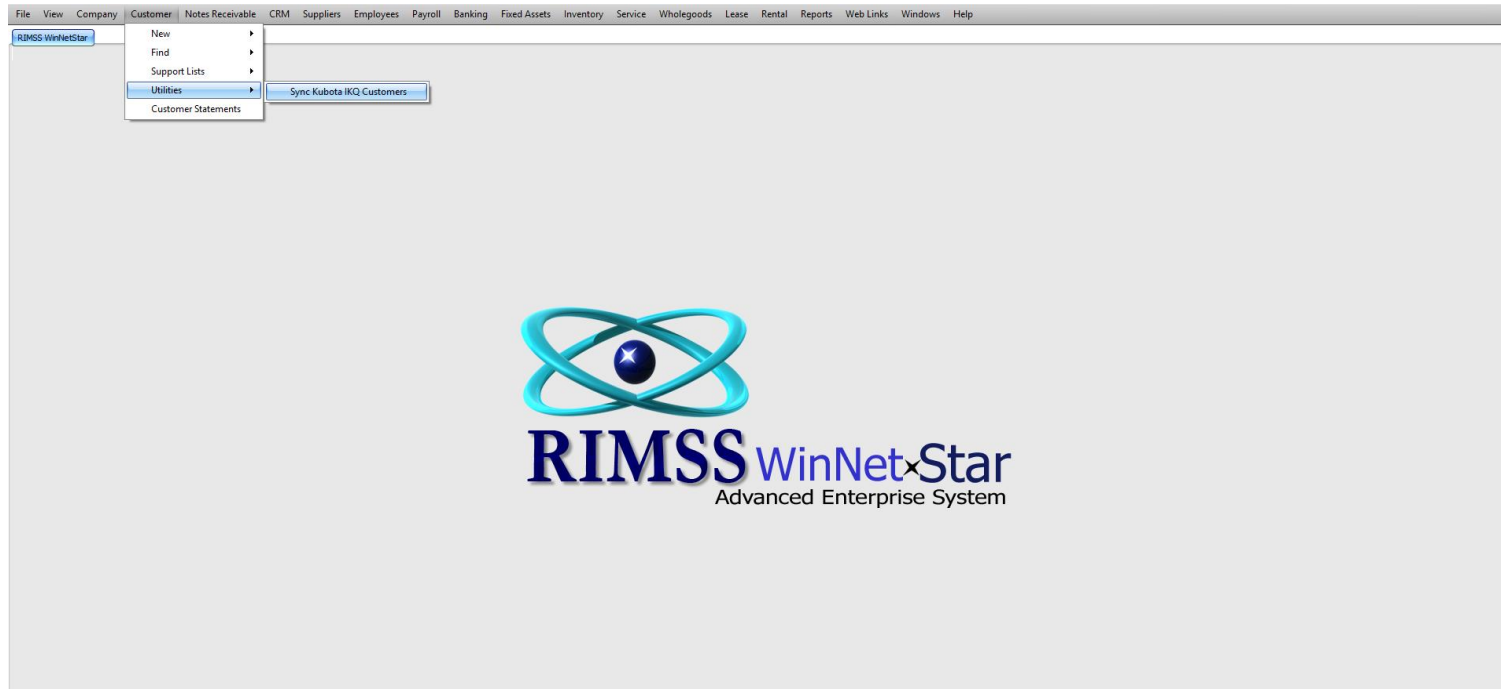


Kubota IKQ Customer Sync

Software Development
RIMSS Business Systems Technology

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WinNetStar includes a feature that allows you to sync the Customer Records in IKQ with your Customer Master Records. To use this feature, navigate to Customer>Utilities>Sync Kubota IKQ Customers. See next screen shot.

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 IKQ Customer Update

Refresh

Existing Customers New Customers

☐ Select All DBS ☐ Select All IKQ Submit Changes

Customer

| Field Name | DBS Value | Select DBS | IKQ Value | Select IKQ | Selected Value | DBS Customer ID | IKQ Customer ID |
|--|--------------------|--------------------------|------------------|--------------------------|----------------|-----------------|-----------------|
| Customer: System ID 14772 (JAMES TEAGUE) (87597) | | | | | | | |
| Company Name | JAMES TEAGUE | <input type="checkbox"/> | JAMES TEAGUE | <input type="checkbox"/> | | 14772 | 212 |
| First Name | phone | <input type="checkbox"/> | phone | <input type="checkbox"/> | | 14772 | 212 |
| Last Name | bus. | <input type="checkbox"/> | bus. | <input type="checkbox"/> | | 14772 | 212 |
| Contact Phone Number 1 | (254) 8979965 | <input type="checkbox"/> | (254) 8979965 | <input type="checkbox"/> | | 14772 | 212 |
| Contact Phone Number 2 | | <input type="checkbox"/> | (254) 8979965 | <input type="checkbox"/> | | 14772 | 212 |
| Email Address | | <input type="checkbox"/> | | <input type="checkbox"/> | | 14772 | 212 |
| Ship To Address Line 1 | 1441 CR 418 | <input type="checkbox"/> | 1441 CR 418 | <input type="checkbox"/> | | 14772 | 212 |
| Ship To Address Line 2 | | | | | | | |
| Ship To City | | | | | | | |
| Ship To State | | | | | | | |
| Ship To Zip | | | | | | | |
| Billing Address Line 1 | | | | | | | |
| Billing Address Line 2 | | | | | | | |
| Billing City | | | | | | | |
| Billing State | | | | | | | |
| Billing Zip | | | | | | | |
| Customer: System ID 18 | | | | | | | |
| Company Name | DAMIAN VOGLE | <input type="checkbox"/> | DAMIAN VOGLE | <input type="checkbox"/> | | 18737 | 327 |
| First Name | JoHN | <input type="checkbox"/> | JoHN | <input type="checkbox"/> | | 18737 | 327 |
| Last Name | VOGLE | <input type="checkbox"/> | VOGLE | <input type="checkbox"/> | | 18737 | 327 |
| Contact Phone Number 1 | | <input type="checkbox"/> | (210) 555-5555 | <input type="checkbox"/> | | 18737 | 327 |
| Contact Phone Number 2 | | <input type="checkbox"/> | | <input type="checkbox"/> | | 18737 | 327 |
| Email Address | dv@dv.com | <input type="checkbox"/> | dv@dv.com | <input type="checkbox"/> | | 18737 | 327 |
| Ship To Address Line 1 | 11 TRUMAN CIRCLE | <input type="checkbox"/> | 11 TRUMAN CIRCLE | <input type="checkbox"/> | | 18737 | 327 |
| Ship To Address Line 2 | | <input type="checkbox"/> | | <input type="checkbox"/> | | 18737 | 327 |
| Ship To City | austin | <input type="checkbox"/> | austin | <input type="checkbox"/> | | 18737 | 327 |
| Ship To State | TX | <input type="checkbox"/> | TX | <input type="checkbox"/> | | 18737 | 327 |
| Ship To Zip | 77777 | <input type="checkbox"/> | 77777 | <input type="checkbox"/> | | 18737 | 327 |
| Billing Address Line 1 | 1188 TRUMAN CIRCLE | <input type="checkbox"/> | 11 TRUMAN CIRCLE | <input type="checkbox"/> | | 18737 | 327 |
| Billing Address Line 2 | | <input type="checkbox"/> | | <input type="checkbox"/> | | 18737 | 327 |
| Billing City | SPRINGTOWN | <input type="checkbox"/> | austin | <input type="checkbox"/> | | 18737 | 327 |
| Billing State | TX | <input type="checkbox"/> | TX | <input type="checkbox"/> | | 18737 | 327 |
| Billing Zip | 76082 | <input type="checkbox"/> | 77777 | <input type="checkbox"/> | | 18737 | 327 |

The IKQ Customer Update screen has two tabs. The Existing Customers Tab represents customer records from IKQ that have been linked to a record in WinNetStar. The user must check the box next to the corresponding value for syncing purposes – either the IKQ value or the DBS value. Values that are different will be highlighted in red. A right mouse click will give you menu options for Select All IKQ, Select All DBS and Delete. All lines for a particular customer must be selected with a check box in either the DBS column or the IKQ column prior to clicking on the Submit Changes button. Clicking on this button will update the respective systems in order to sync the data. See next screen shot for discussion of the New Customers tab.

RIMSS WinNetStar IKQ Customer Update

Refresh

Existing Customers New Customers

Drag a column header here to group by that column

| IKQ Customer ID | Customer Company Name | Contact First Name | Contact Last Name | Bill To Address Line1 | Bill To Address Line2 | Bill To City | Bill To Postal Code | Bill To Stat... | Email Address | Contact Phone Number 1 | Contact Phone Number 2 |
|-----------------|-----------------------------------|--------------------|-------------------|--------------------------|-------------------------|--------------|---------------------|-----------------|---------------------------|------------------------|---------------------------|
| 161 | Thomas Company x3 | Thomas | Test | | | | | | test@test.com | 3215686658 | |
| 163 | Plake And Company | Robert | Plake | | | | | | rplake33@80001.com | 877-357-2093 | |
| 167 | 80001 Company 2 | Jerold | Barlow | | | | | | | | |
| 175 | testing 10 | testing | 10 | | | | | | | | |
| 177 | test12 | test12 | test12 | | | | | | | | (714) 444-5555 |
| 196 | CABALLERO SAND AND GRAV... | JOSE | CABALLER | | | | | | | | (940) 229-4789 |
| 197 | Joes Company | Joe | Klump | | | | | | | | |
| 199 | RIMSS TEST CUSTOMER | | | | | | | | | | |
| 204 | THOMPSON TRUE TEST | | | | | | | | | | |
| 207 | DBS Test Scenario 1 Customer | DBS | Scenario 1 | | | | | | | | |
| 216 | test4denton | test4-80001 | Denton | | | | | | | | |
| 218 | Test Company | New Customer | Test | | | | | | | | |
| 244 | Jim Nguyen Jr | jim | nguyen | | | | | | | | |
| 266 | Eric's Farm | Eric | Sambaluk | | | | | | | | (714) 888-1234 |
| 271 | Ericco 1 | Quote 1 | Ten 1 | | | | | | | ext. 111 | (682) 304-7324 ext. 111 |
| 301 | Andrew's tester Company | Andrew | Testercomp | | | | | | | | |
| 307 | Testing Interface Fields to Sh... | Andrew | Tester1 | | | | | | | ext. 12223 | (333) 444-4333 ext. 33222 |
| 310 | Testing Interface Fields to Sh... | Andrew | Tester | | | | | | | ext. 12322 | (223) 333-3333 ext. 3 |
| 311 | Andrews Tester with Calance ... | Andrew | Tester4 | | | | | | | ext. 21232 | (343) 224-3234 ext. 32221 |
| 312 | Andrew's Validation of Quote ... | Andrew | Validation1 | | | | | | | ext. 32322 | (444) 323-2323 ext. 33211 |
| 313 | Andrew's Test Customer with ... | Andrew | Tester9 | | | | | | | ext. 52222 | (432) 343-2324 ext. 34323 |
| 318 | Company Name Field | Andrew | July10teste | | | | | | | | (323) 433-2343 |
| 321 | DOG SERVICES | JASON | QUILL | | | | | | | | (210) 555-1212 |
| 325 | April Moore Tester | April | Moore | | | | | | | | |
| 329 | Dogwood Sales | Kim | Nydall | | | | | | | | (210) 557-5555 |
| 330 | Andrew Company Name July 13 | Andrew | Testerjuly13 | 12345 Shipping Address 1 | 54321 Shipping Address2 | City | 33322 | TX | email@gmail.com | (222) 333-4444 | (333) 444-4333 |
| 331 | April's Landscape | April | Moore | 1001 landscape way | | fort worth | 76020 | TX | aprilandscape@gmail.com | (817) 777-7878 | |
| 336 | Showroom Test 7/13 | Andrew | Agn | 10000 showroom test | | fort worth | 76020 | TX | Showroomtest@gmail.com | (817) 726-1212 | |
| 348 | Sales Ops | Martha | Hennigan | | | | | | Martha.Hennigan@gmail.com | 7143352091 | |
| 349 | Gr8OnE | John | Ma | 1000 Kubota Drive | | Grapevine | 76051 | TX | john.ma@kubota.com | (817) 771-5043 | (817) 771-5043 |
| 351 | HAHA corporation | bryan | adam | 1234 hello ave | | ft worth | 76106 | TX | haha@corp.com | (714) 556-8847 | |
| 352 | Showroom "The Works" | Showroom | Tester | 1000 Billing address 1 | 1000 Billing address 2 | Seattle | 78909 | WA | Showroom@gmail.com | (817) 726-1921 | (817) 905-0551 |
| 353 | Woods test | Test | Woods | 1212 anovlance | | city2 | 12121 | TX | hwzain@yahoo.com | (222) 222-2222 | (222) 222-2222 |

The New Customers tab will display all customer data from quotes sent to WinNetStar from IKQ where the customer was not linked to an existing WinNetStar customer record. A right mouse click on this tab will produce menu options for Link to Existing Customer, Create New Customer and Delete.

The Link to Existing Customer option produces a customer search pop up. Find the customer and double click to create the link. If there are difference in data fields between the IKQ data on this screen and the data elements in the linked record from WinNetStar, the customer will now show up on the Existing Customers tab for you to resolve those difference and perform the final sync.

The Create New Customer option will create a new customer master record in WinNetStar.

If you do not wish to Link or Create a new record, select the Delete option.