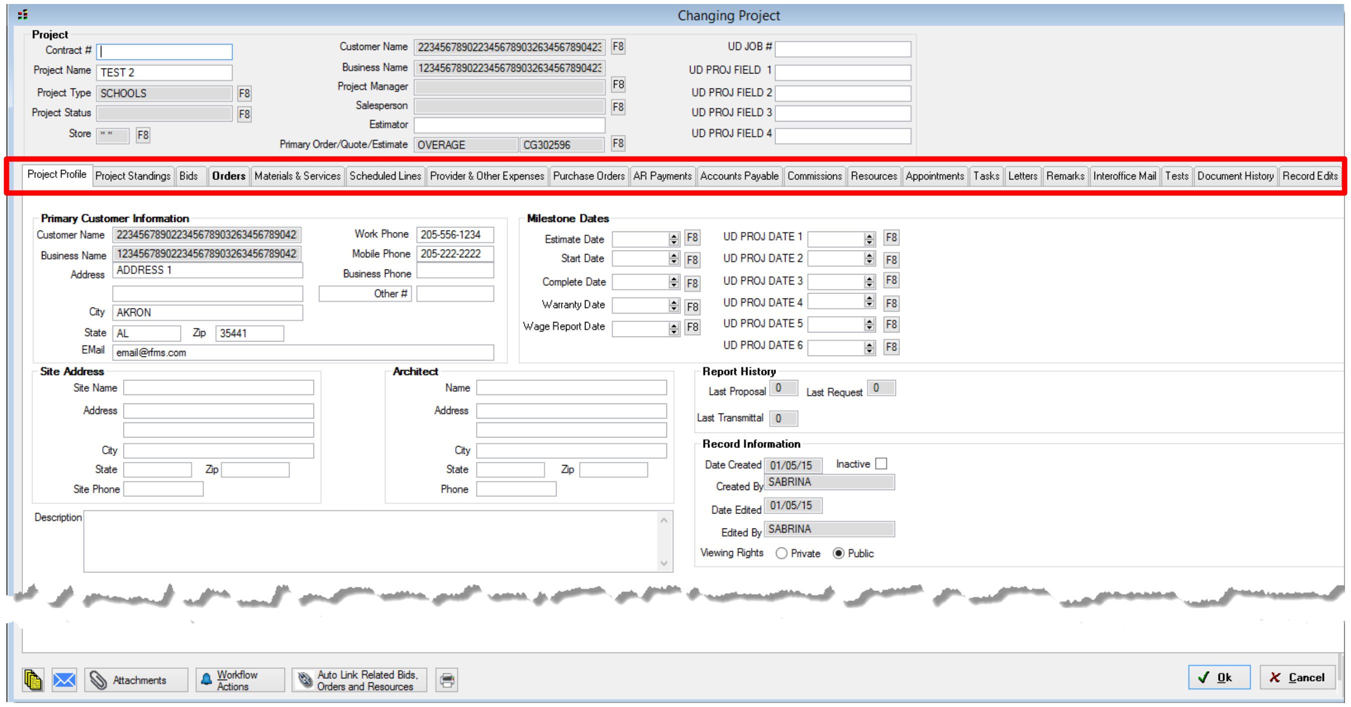
Overview

Commercial Project Manager is way to look at all aspects of a project in RFMS Core and its related to Module. Tabs for each area are listed on the Adding/Changing Project screen.



The tabs are

- Project Profile
- Bids
- Orders
- Materials & Services
- Scheduled Lines
- Provider Records
- Purchase Orders
- AR Payments
- Accounts Payable
- Commissions
- Resources
- Appointments
- Tasks
- Letters
- Remarks
- Interoffice Mail
- Tests
- Document History
- Record Edits

Commercial Project Manager Buttons

	View **all notes** for Project and Related Records.
	Send Interoffice Mail or email for Project Customer
Attachments	Project Attachments
Workflow Actions	[Project Workflow Actions](#)
Auto Link Related Bids, Orders and Resources	[Link in Related Records](#)
	[**Print** Reports for Projects](#)
Ok	**Saves** the current information and **exits** the screen.
Cancel	**Exits** the screen without saving the newly entered information.
	View Details Selected Record
Edit	Edit Selected Record
	Link Existing Record to Project
	Remove Link
	Refresh browse data
	View Notes for Selected Records
	View PDF history for selected record
	View Order history for selected record
	View Order Tracking for selected record
	Include in Project Standings
	Do NOT include in Project Standings
Copy	Copy Quote or BidPro Estimate

	Export Quote or BidPro Estimate to Order
	Add New Quote or BidPro Estimate
Baselines	Baseline Functions
New Order	Add New Order
Unreleased Release Completed	Set Status for Scheduled Line
View Mail	View Selected Interoffice Mail
Tab Text is **BOLD BLACK**	Tab includes records
Tab Text is **RED BOLD**	Tab includes records and some are overdue/High Priority (Appointments, Tasks, Letters, Mail)
Tab Text is **BLUE BOLD**	Tab includes records and all are Completed (Appointments, Tasks, Letters, Mail)

Notes:

The tabs can be in one layer or two (stacked) depending on the size of the screen and how many tabs have bold writing.

Project Profile

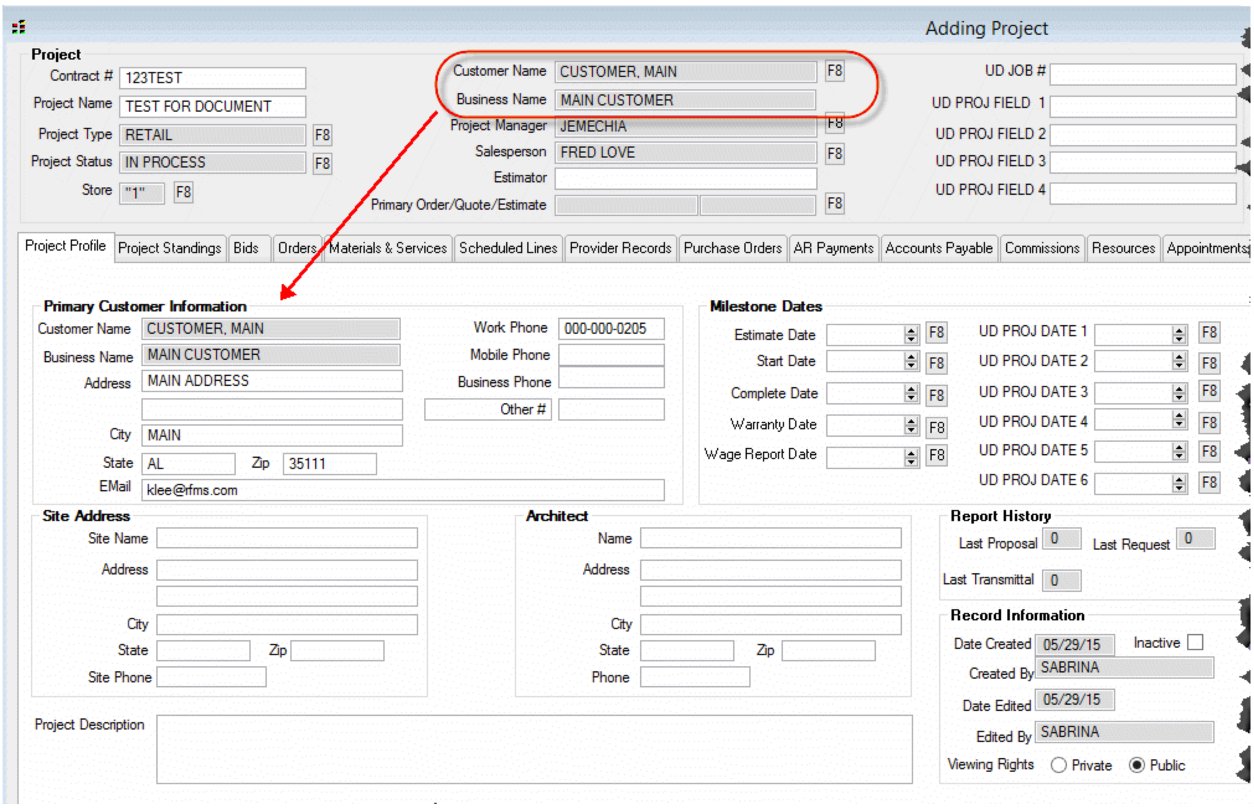
This tab contains information pulled in from the Customer file and other dates and contact information for the project.

The Primary Customer Information is pulled from the Customer Name that is entered at the top part of the Project screen.

The Milestone Dates includes 6 user defined fields.

The Description field can be used to give an overview of the project.

Site Address and Architect are entered manually on this tab.



Bids

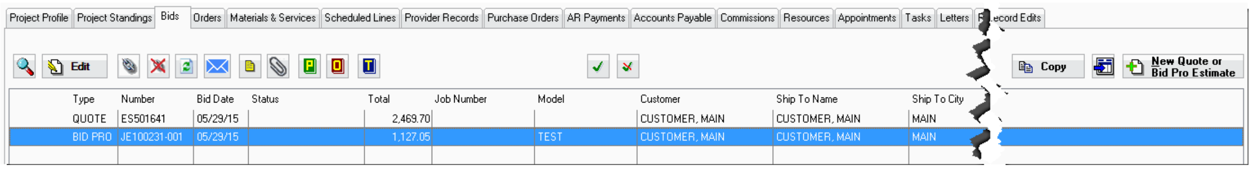
This tab will list all of the quotes from Order Entry and the estimates from BidPro.

It will show the type of quote (original, primary or related). On related quotes, the primary quote will be given in parenthesis.

The related quotes and estimates can be created, viewed, edited or exported from this screen.

Filters available on this screen are Change Orders, AO/CM, Commissions Not Pad, Balance Options and Delivered Options.

The Green Check button determines which Estimates/Bids will be used in the Project Standings Quote/Estimate column.



Notes:

Quotes/Bid Pro Estimates that are deleted from Order Entry/Bid Pro will automatically be deleted from the Project.

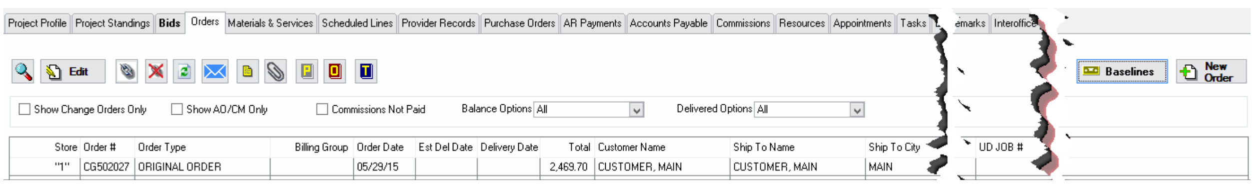
Orders

This tab will list all the orders from Order Entry that are related to the project.

Orders can be created, viewed, or edited.

The Baseline Operations and Reports can also be accessed from this tab.

The filters default to show ALL orders.



Notes:

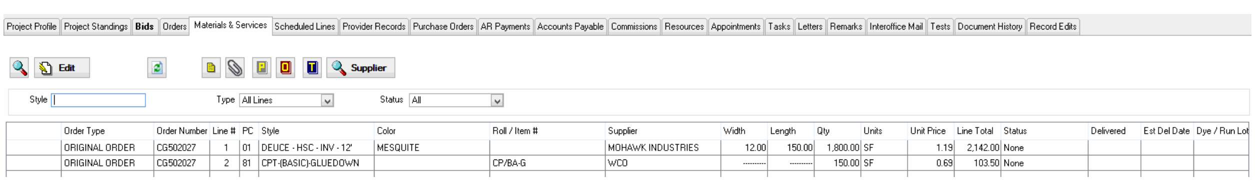
Baseline button is only available for Original Orders.

Materials & Services

This tab shows all of the lines of materials and services on Orders related to the Project.

Lines can be viewed and edited from this screen.

Filters available on this screen are Style, Type, and Status.



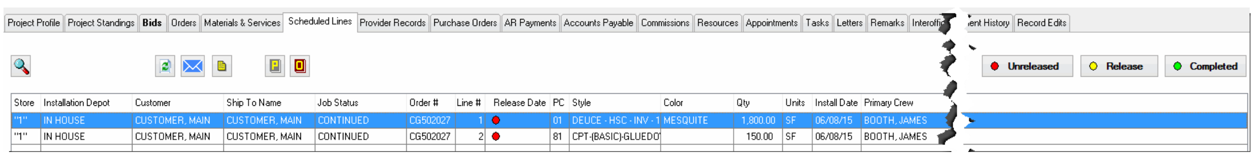
Notes:

- Icons for Scheduled Lines, Notes and Attachments are shown for each line.
- The lines are sorted by Order Number and Line Number.
- Passwords are picked up from Order Entry for editing.

Scheduled Lines

This tab shows the lines of an order related to the project that have been scheduled.

As an overview of the project, Release Dates have been added to this screen. From this screen the Release Date can be changed using the buttons in the top right corner. Scheduled Lines can be set to statuses of Unreleased, Released and Completed. When a line is released, a Release Date will display. This is only a snapshot of where each line in the project is.

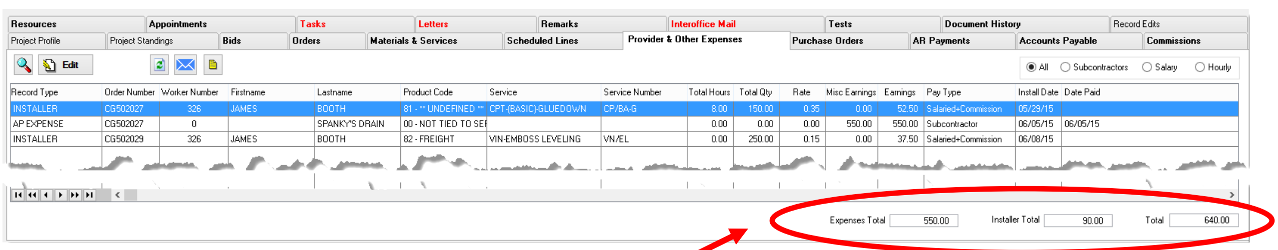


Provider & Other Expenses

This tab displays all the provider records related to an Order listed on the Orders tab.

Provider Records can be edited from this screen.

Filters available on this screen are Subcontractors, Salary, and Hourly.



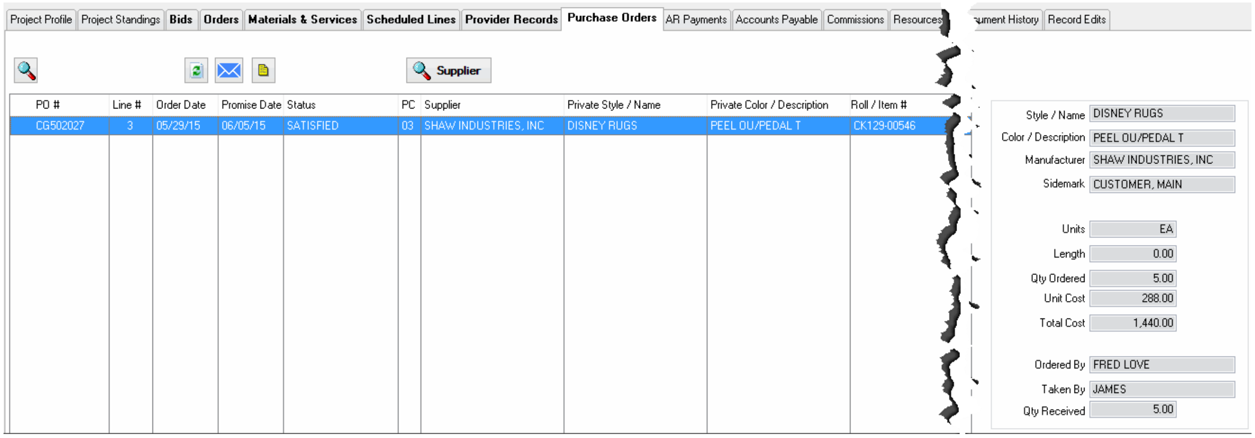
Totals are listed at the bottom of the page.

Notes:

Expense records entered with the Black Arrow will not be displayed on this tab. They will be on the Accounts Payable Tab.

Purchase Orders

This tab displays the purchase order records that are connected to the order lines related to the project. Purchase Orders can only be viewed not edited from this tab.



AR Payments

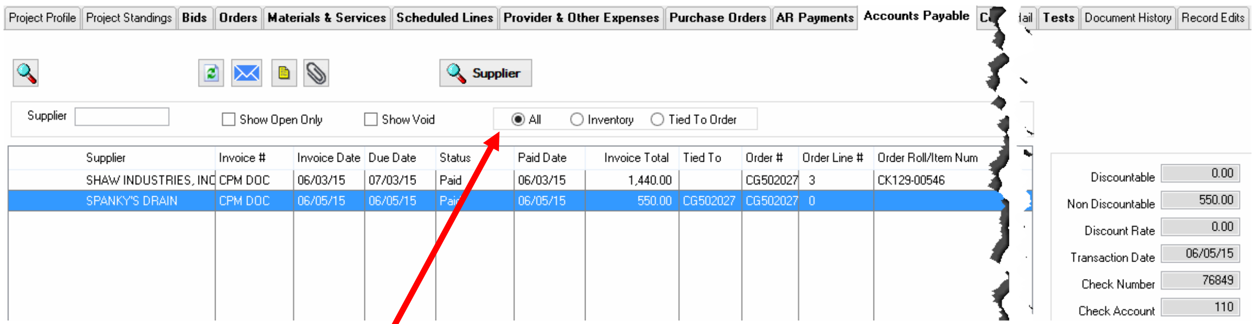
This tab contains payments that are related to the orders listed on the orders tab. Filter on this screen is by Receipt Number.

Accounts Payable

This tab displays Accounts Payable records that are connected to the Order on the Orders tab.

These records can come from Inventory, Provider Records (via the Black Arrow) and Accounts Payable (via the Black Arrow).

The filter on this screen is by Supplier, Show Open Only and Show Voids.



The screen can also be filtered by All Inventory or Tied to Order.

- All-the Accounts Payable records that are connected to the Order on the Order tab included the ones from Inventory or pulled in from Provider Records or Accounts Payable via the Black Arrow
- Inventory-this only shows the Accounts Payable records that have been added via Inventory
- Tied to Order-this only shows the accounts records that come over via the Black Arrow.

Notes:

Order Number, Order Line # and Order Roll/Item Number will be displayed where applicable.

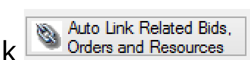
Records that were split from the original AP record (if the invoice prefix is the same) will now be displayed on this tab.

Commissions

This tab will show the commissions that are related to the orders listed on the Orders tab. Viewing is the only option on this tab.

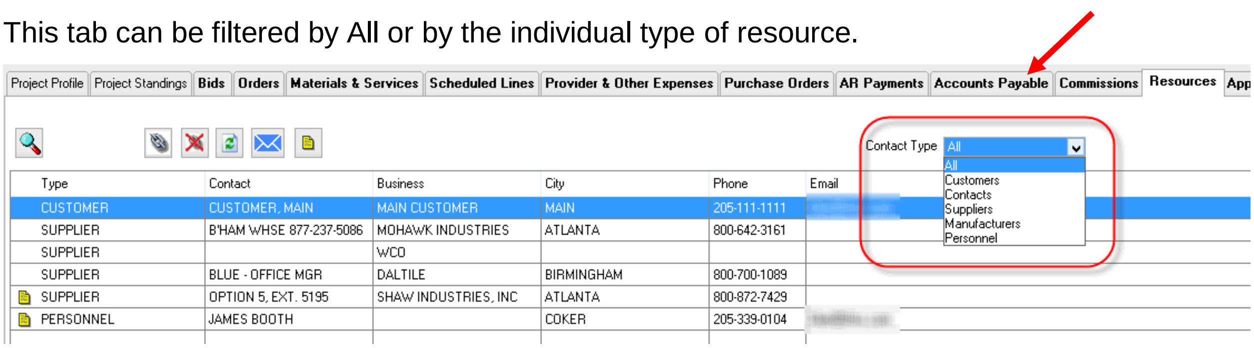
Resources

This tab contains information for customers, contacts, suppliers, personnel or manufacturers related to the project.

These can be linked to the project by using the Link  or Auto Link 

buttons.

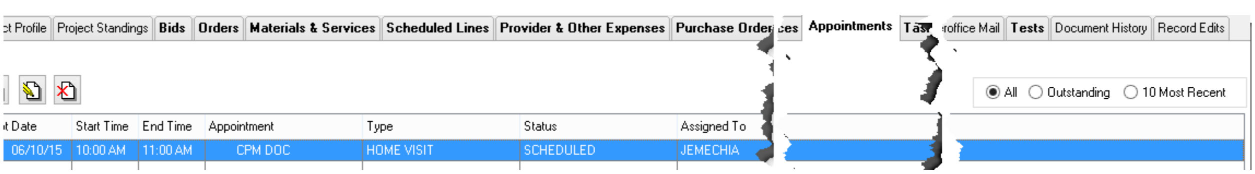
This tab can be filtered by All or by the individual type of resource.



Appointments

This tab shows all related appointments to this project.

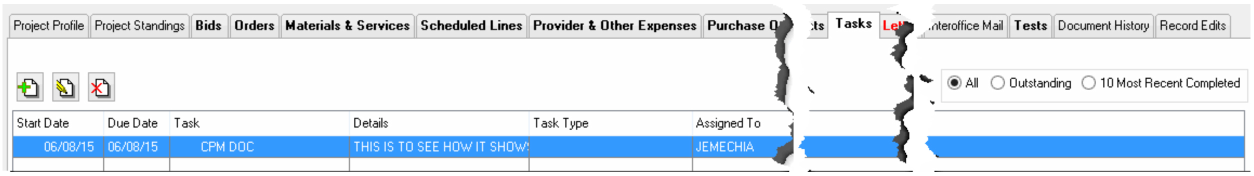
The filter on this screen is all, the outstanding items or the 10 most recent items.



Tasks

This tab shows all related tasks to this project.

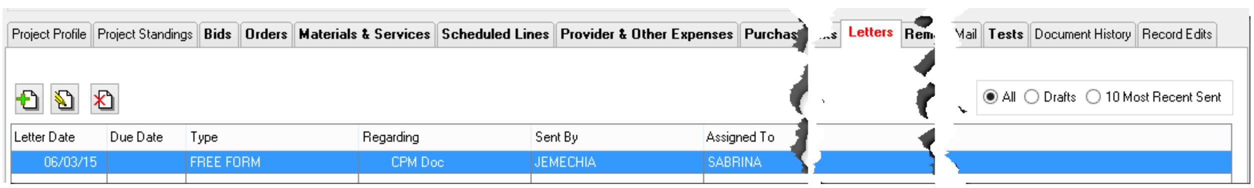
The filter on this screen is the all, outstanding items or the 10 most recent items.



Letters

This tab shows all related letters to this project.

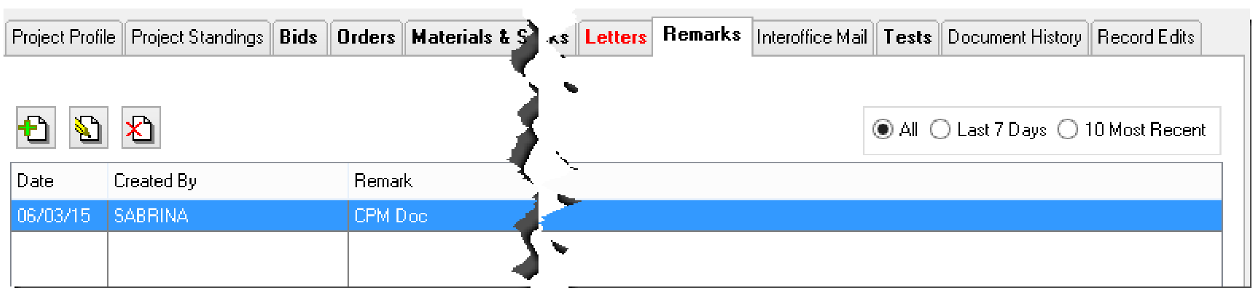
The filter on this screen is the all, drafts or the 10 most recent sent.



Remarks

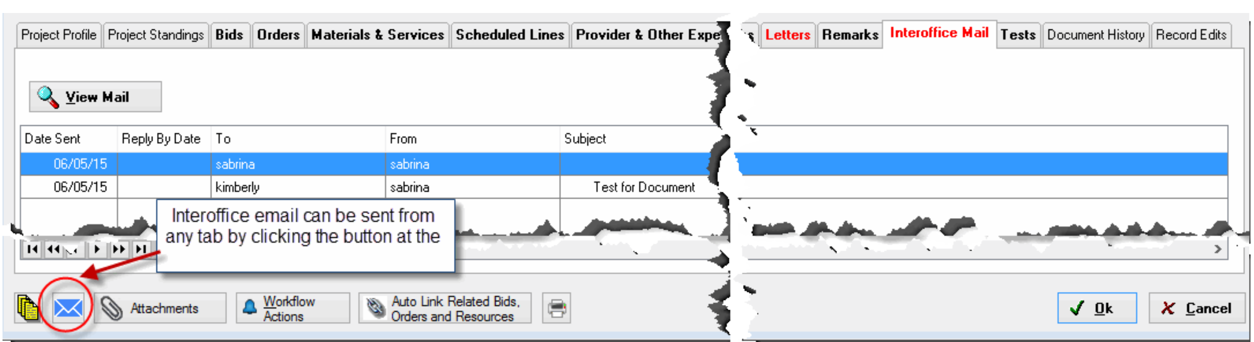
This tab shows all related remarks to this project.

The filter on this screen is all, last 7 days or 10 most recent.



Interoffice Mail

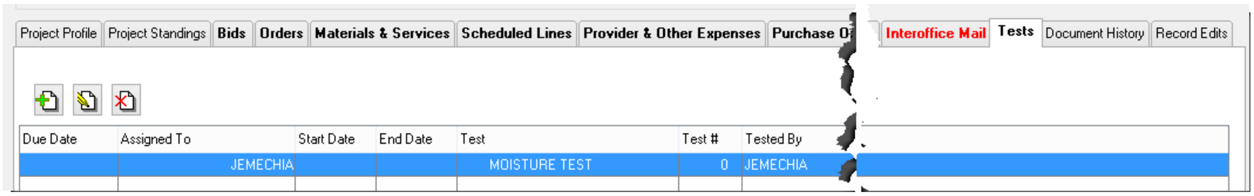
This tab shows previously sent interoffice mail related to this record.



Tests

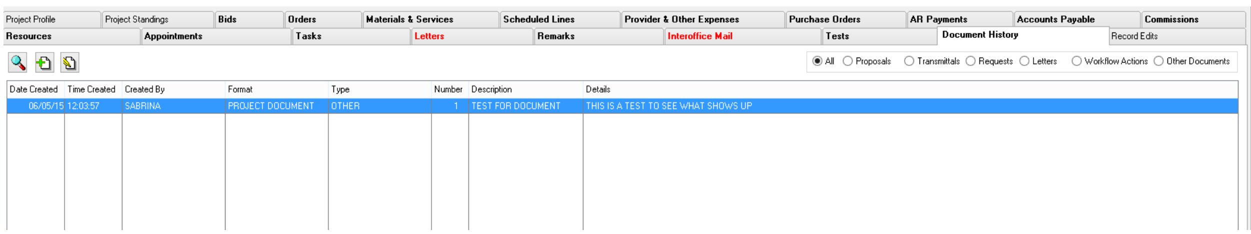
This tab includes information about testing required to validate the materials warranty.

Currently the only test tracked is Moisture.



Document History

This tab shows documents such as proposals, transmittals, requests, letters, workflow actions and other documents that are associated with the project.



The only fields that can be edited are the Date Completed, Completed By and the Details fields if it is an Other Document entry.

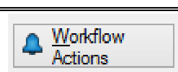
Record Edit

This tab is used if Enterprise Manager is being used. It will track any edits related to the project file.

Attachments

This button only show attachments to the project itself. It does not show things attached to the individual orders, quotes or bids.

Project Workflow Actions



For more details on Project Workflow Actions, click here.

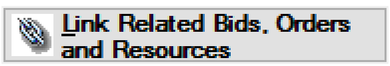
Linking Records to the Project

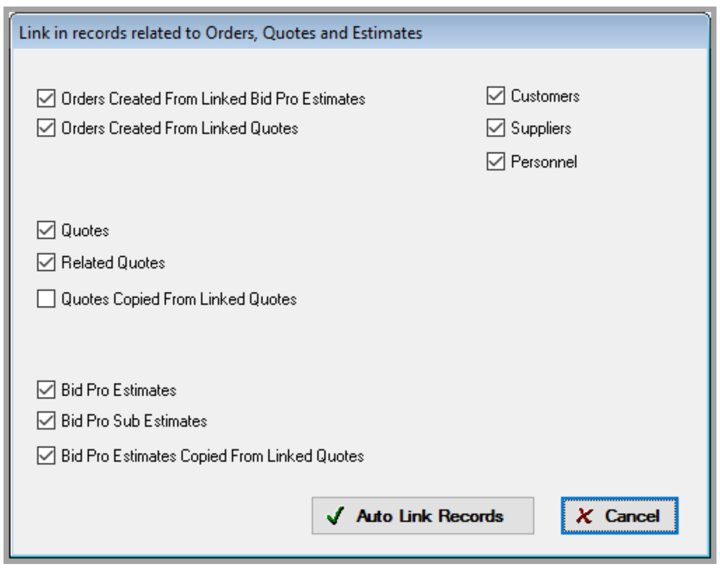
- To link an estimate, order or quote that has already been created, use the link button.
- If you link an order, quote or bid pro estimate using the primary button on the project it will automatically be added to the appropriate tab.

- The Auto link button brings in any orders, quotes, bid pro estimates and resources that are related.

The only things that can be manually linked or auto linked are orders, quotes, bid pro estimates and resources. All other tabs will display related information based on orders, quotes and bid pro estimates.

The screen below appears when the Link Related Bids, Order and Resources button is clicked.





Automatically adds in all Add Ons, Credit Memos, Overages, Claims, Billing Group Orders and Billing Group Change Orders

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Print Reports for Projects

General (for more details, click here)

- Tests
- Installation Forecast
- Status of Quotes, BidPro Estimates & Orders by Salesperson
- Material Status by Salesperson
- All Change Orders

Proposals & Change Orders

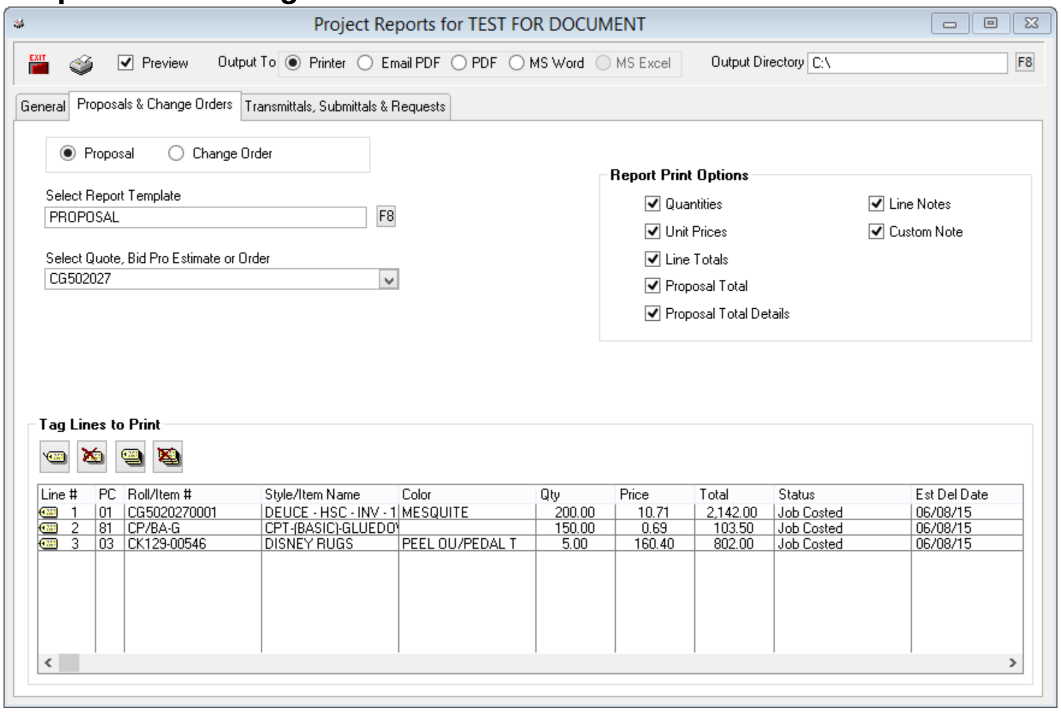
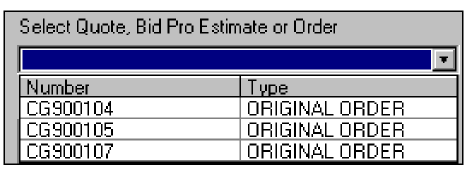


Figure: Proposal Report Options

First choose to print a Proposal or Change order.

Next, choose the proposal or change order type from the types set up in *Client Management>Utilities>Client Management Set Up>Project Report Templates.* Click here for details.

Next choose the actual related record to use.



All **lines** are tagged automatically, untag the lines you don't wish to print or untag all and tag only the lines to print.

Then choose the options for what detail to include on the report.

Custom Notes are pulled from the Quote, Estimate or Order Custom Notes.

Proposal Lines are sorted by PC, Private Style, and then Private Color.

PROPOSAL Proposal Number: 2

Customer:

Ship To:
740 Union Shopping Center
Sand Destin FL 65112

Project Information:

Project Name: Another Project
Based on Order: CG900104
Contract Number:
Status:
UD Job Num:
Project Manager:
PM Phone #:
General Contractor:
Estimate Date:
Bid Due:
Bid Submitted:
Bid Accepted:

Style	Color	Supplier	PC	Qty	Units	Price	Total
ADOBE VILLAGE	WINTER WHEAT	BEAULIEU	01	666.67		11.10	7,400.04
ADOBE VILLAGE	WINTER WHEAT	BEAULIEU	01	533.33		11.10	5,919.96
ARUBA	ARUBA	BEAULIEU	01	6.67		7.01	46.76
STUFF	OTHER		01	50.00		5.38	269.00
GALAXY	ALEXANDRIA CHERRY NAT	ARMSTRONG	04	102.90	SF	4.04	415.72
CERAMIC LABOR- INSTALL/FLR TIL		EMPLOYEE	65	102.90	SF	2.50	257.25

Line Notes

Material Total:	$14,051.48
Labor Total:	$257.25
Misc Total:	$0.00
Tax Total:	$1,334.89
Proposal Total:	$15,643.62

Order Custom Notes

Figure: Proposal Report Sample

This reports can be printed, emailed as PDF, saved as PDF, saved as word or saved as Excel.

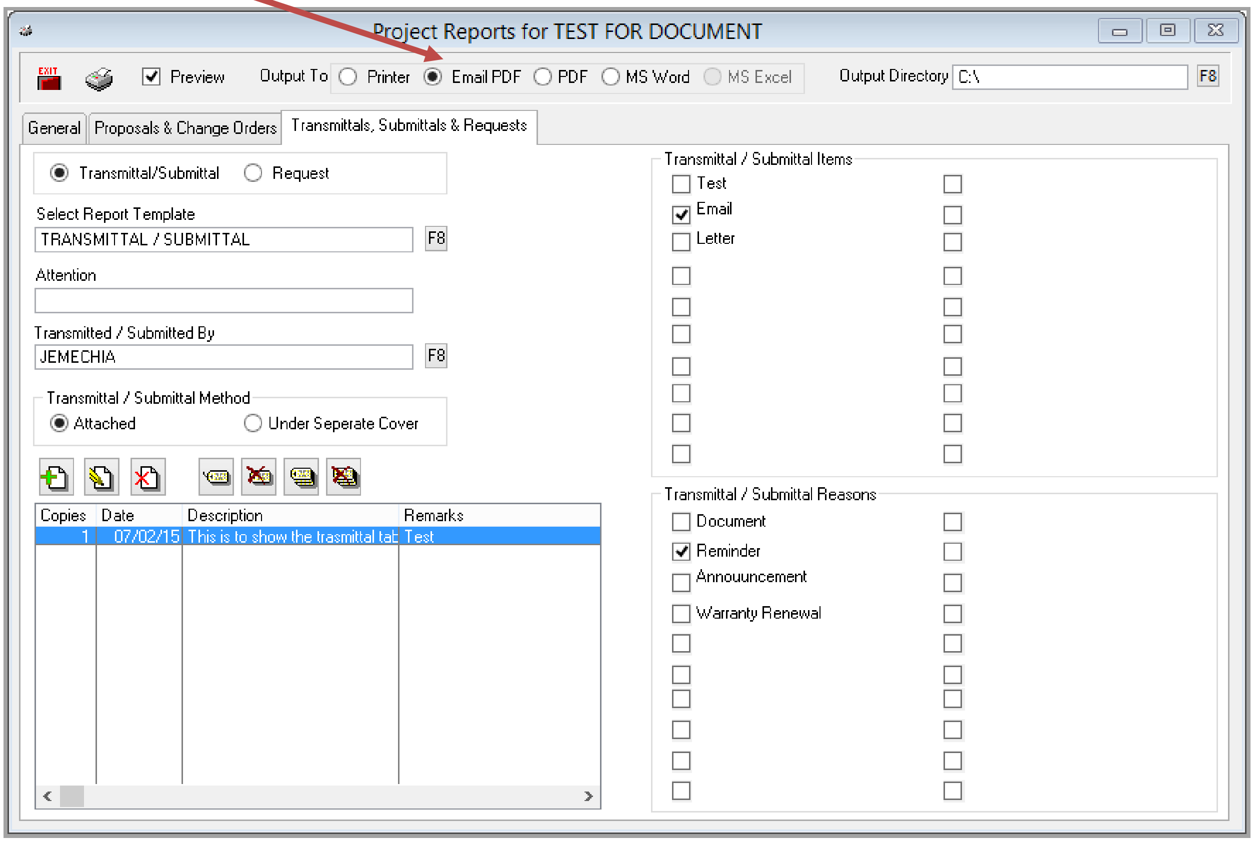
Transmittals, Submittals & Requests

This is an area where communications can be created and sent so that all communications in a project are tracked.

Transmittals, Submittal and Request Template are set up at *Utilities>Client Management Set Up>Project Report Templates.* For more information on this, click here.

From this screen, Transmittals, Submittals and Request can be created, edited, deleted or printed.

Output options are Printer, Email PDF, PDF, MS Word or MS Excel.



Baselines and Financial Progress

This screen allows creating a baseline for the highlighted customer order, the billing group that order is a part of or the CMM Project. The baseline is a "snapshot" of the order at that moment in time. A report that compares a previous baseline with the order in its current status can also be printed. Baseline points can be used to compare how a job is doing over a period of time and the final quantity, cost, selling price and gross profit percentage.

For more information, on Baselines and Financial Progress, click here.

Notes:

Users should password protect the buttons on this screen not the whole screen.