

Overview



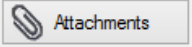

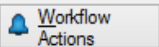
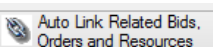

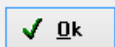












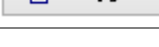
Commercial Project Manager is way to look at all aspects of a project in RFMS Core and its related to Module. Tabs for each area are listed on the Adding/Changing Project screen.








The screenshot displays the 'Changing Project' interface. At the top, there are input fields for Project details (Contract #, Project Name, Project Type, Project Status, Store) and Customer information (Customer Name, Business Name, Project Manager, Salesperson, Estimator, Primary Order/Quote/Estimate). A navigation bar below these fields contains tabs for: Project Profile, Project Standings, Bids, **Orders**, Materials & Services, Scheduled Lines, Provider & Other Expenses, Purchase Orders, AR Payments, Accounts Payable, Commissions, Resources, Appointments, Tasks, Letters, Remarks, Interoffice Mail, Tests, Document History, and Record Edits. The main area is divided into several sections: Primary Customer Information (with fields for name, phone, address, city, state, zip, email), Milestone Dates (with dropdowns for Estimate, Start, Complete, Warranty, Wage Report dates), Site Address, Architect (with fields for name, address, city, state, zip, phone), Report History (with Last Proposal and Last Request counts), and Record Information (with Date Created, Created By, Date Edited, Edited By, and Viewing Rights). At the bottom, a toolbar includes icons for Attachments, Workflow Actions, and Auto Link Related Bids, along with 'Ok' and 'Cancel' buttons.

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
 	Project Attachments
	Project Workflow Actions
	Link in Related Records
	Print Reports for Projects
	Saves the current information and exits the screen.
	Exits the screen without saving the newly entered information.
	View Details Selected Record
	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 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.

The screenshot displays the 'Project Profile' software interface. At the top, the 'Project' section includes fields for Contract # (123TEST), Project Name (TEST FOR DOCUMENT), Project Type (RETAIL), Project Status (IN PROCESS), and Store (11). A red circle highlights the Customer Name (CUSTOMER, MAIN) and Business Name (MAIN CUSTOMER) fields. Below this is a tabbed interface with 'Project Profile' selected. The 'Primary Customer Information' section shows the same customer details as above, plus Work Phone (000-000-0205), Mobile Phone, Business Phone, and Other #. The 'Milestone Dates' section has six date pickers labeled UD PROJ DATE 1 through 6. The 'Site Address' section has fields for Site Name, Address, City, State, Zip, and Site Phone. The 'Architect' section has fields for Name, Address, City, State, Zip, and Phone. The 'Report History' section shows Last Proposal (0), Last Request (0), and Last Transmittal (0). The 'Record Information' section shows Date Created (05/29/15), Created By (SABRINA), Date Edited (05/29/15), Edited By (SABRINA), and Viewing Rights (Private, Public).

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.

Type	Number	Bid Date	Status	Total	Job Number	Model	Customer	Ship To Name	Ship To City
QUOTE	ES501641	05/29/15		2,469.70			CUSTOMER, MAIN	CUSTOMER, MAIN	MAIN
BID PRO	JE100231-001	05/29/15		1,127.05		TEST	CUSTOMER, MAIN	CUSTOMER, MAIN	MAIN



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.

Store	Order #	Order Type	Billing Group	Order Date	Est Del Date	Delivery Date	Total	Customer Name	Ship To Name	Ship To City	UD JOB #
"1"	CG502027	ORIGINAL ORDER		05/29/15			2,469.70	CUSTOMER, MAIN	CUSTOMER, MAIN	MAIN	



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.

Order Type	Order Number	Line #	PC	Style	Color	Roll / Item #	Supplier	Width	Length	Qty	Units	Unit Price	Line Total	Status	Delivered	Est Del Date	Dye / Run Lot
ORIGINAL ORDER	CG502027	1	01	DEUCE - HSC - INV - 12'	MESQUITE		MOHAWK INDUSTRIES	12.00	150.00	1,800.00	SF	1.19	2,142.00	None			
ORIGINAL ORDER	CG502027	2	01	CPT-BASIC-GLUEDOWN		CP/BA-G	WCO			150.00	SF	0.69	103.50	None			



- 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.

Store	Installation Depot	Customer	Ship To Name	Job Status	Order #	Line #	Release Date	PC	Style	Color	Qty	Units	Install Date	Primary Crew
"1"	IN HOUSE	CUSTOMER_MAIN	CUSTOMER_MAIN	CONTINUED	CG502027	1		01	DEUCE - HSC - INV - 1	MESQUITE	1,800.00	SF	06/08/15	BOOTH, JAMES
"1"	IN HOUSE	CUSTOMER_MAIN	CUSTOMER_MAIN	CONTINUED	CG502027	2		81	CPT-(BASIC)GLUEDO		150.00	SF	06/08/15	BOOTH, JAMES

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.

Record Type	Order Number	Worker Number	Firstname	Lastname	Product Code	Service	Service Number	Total Hours	Total Qty	Rate	Misc Earnings	Earnings	Pay Type	Install Date	Date Paid
INSTALLER	CG502027	326	JAMES	BOOTH	81 - UNDEFINED	CPT-(BASIC)GLUEDOWN	CP/BA/G	8.00	150.00	0.35	0.00	52.50	Salaries+Commission	05/29/15	
AP EXPENSE	CG502027	0		SPANKY'S DRAIN	00 - NOT TIED TO SET			0.00	0.00	0.00	550.00	550.00	Subcontractor	06/05/15	06/05/15
INSTALLER	CG502029	326	JAMES	BOOTH	82 - FREIGHT	VIN EMBROSS LEVELING	VN/EL	0.00	290.00	0.15	0.00	37.50	Salaries+Commission	06/08/15	

Expenses Total 550.00 Installer Total 90.00 Total 640.00

Totals are listed at the bottom of the page.



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.

Project Profile | Project Standings | Bids | Orders | Materials & Services | Scheduled Lines | Provider Records | **Purchase Orders** | AR Payments | Accounts Payable | Commissions | Resources | Document History | Record Edits

Supplier

PO #	Line #	Order Date	Promise Date	Status	PC	Supplier	Private Style / Name	Private Color / Description	Roll / Item #
CG902027	3	05/23/15	06/05/15	SATISFIED	03	SHAW INDUSTRIES, INC	DISNEY RUGS	PEEL OU/PEDAL T	CK129-00546

Style / Name: DISNEY RUGS

Color / Description: PEEL OU/PEDAL T

Manufacturer: SHAW INDUSTRIES, INC

Sidemark: CUSTOMER, MAIN

Units: EA

Length: 0.00

Qty Ordered: 5.00

Unit Cost: 288.00

Total Cost: 1,440.00

Ordered By: FRED LOVE

Taken By: JAMES

Qty Received: 5.00

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.

Project Profile | Project Standings | Bids | Orders | Materials & Services | Scheduled Lines | Provider Records | Payments | **AR Payments** | Accounts Payable | Interoffice Mail | Tests | Document History | Record Edits

Receipt Number: 0

Receipt Number	Order Number	Customer Name	Payment	Discount	Payment Date
090739	CG902027	CUSTOMER, MAIN	1,500.00	0.00	06/03/15

Reference Number: DOC TEST

Payment Date: 06/03/15

Order Date: 05/23/15

Delivery Date: 06/03/15

Check Account:

Discount Account Code:

Payments

Check: 0.00

Cash: 1,500.00

Credit Card: 0.00

Balance Information

Previous Balance: 3,351.90

Payment: 1,500.00

Applied Discount: 0.00

New Balance: 1,851.90

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 screenshot shows the Accounts Payable screen with a navigation bar at the top containing tabs: Project Profile, Project Standings, Bids, Orders, Materials & Services, Scheduled Lines, Provider & Other Expenses, Purchase Orders, AR Payments, Accounts Payable, and a partially visible 'C' tab. Below the navigation bar is a search area with a 'Supplier' search icon and a search box. Below the search area are filter options: 'Show Open Only' (checkbox), 'Show Void' (checkbox), and a radio button group with 'All' (selected), 'Inventory', and 'Tied To Order'. A red arrow points to the 'All' radio button. Below the filters is a table with the following data:

Supplier	Invoice #	Invoice Date	Due Date	Status	Paid Date	Invoice Total	Tied To	Order #	Order Line #	Order Roll/Item Num
SHAW INDUSTRIES, INC	CPM DOC	06/03/15	07/03/15	Paid	06/03/15	1,440.00		CG502027	3	CK129-00546
SPANKY'S DRAIN	CPM DOC	06/05/15	06/05/15	Paid	06/05/15	550.00	CG502027	CG502027	0	

On the right side of the screen, there are several input fields for filtering: Discountable (0.00), Non Discountable (550.00), Discount Rate (0.00), Transaction Date (06/05/15), Check Number (76849), and Check Account (110).

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.




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  Auto Link Related Bids, Orders and Resources buttons.

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

Type	Contact	Business	City	Phone	Email
CUSTOMER	CUSTOMER, MAIN	MAIN CUSTOMER	MAIN	205-111-1111	
SUPPLIER	B'HAM WHSE 877-237-5086	MDHAWK INDUSTRIES	ATLANTA	800-642-3161	
SUPPLIER		WCO			
SUPPLIER	BLUE - OFFICE MGR	DALTILE	BIRMINGHAM	800-700-1089	
SUPPLIER	OPTION 5, EXT. 5195	SHAW INDUSTRIES, INC	ATLANTA	800-872-7429	
PERSONNEL	JAMES BOOTH		COKER	205-339-0104	

Appointments

This tab shows all related appointments to this project.

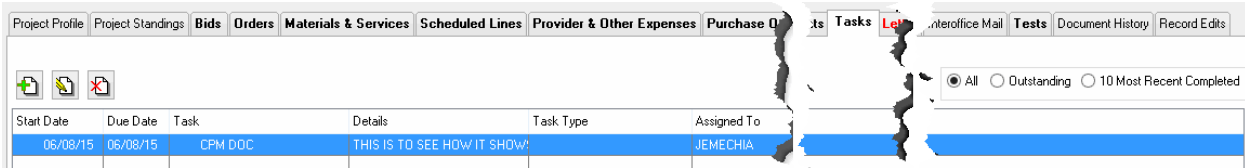
The filter on this screen is all, the outstanding items or the 10 most recent items.

Date	Start Time	End Time	Appointment	Type	Status	Assigned To
06/10/15	10:00 AM	11:00 AM	CPM DOC	HOME VISIT	SCHEDULED	JEMECHIA

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.

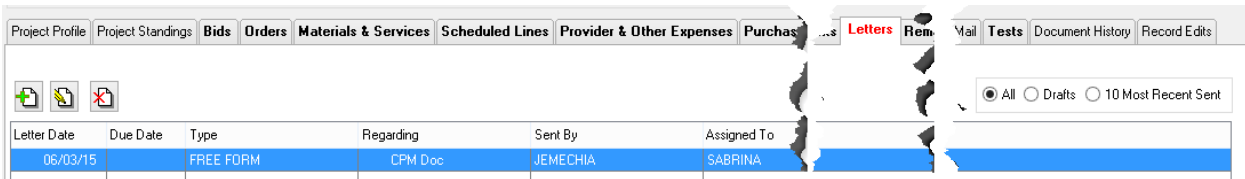


Start Date	Due Date	Task	Details	Task Type	Assigned To
06/08/15	06/08/15	CPM DOC	THIS IS TO SEE HOW IT SHOW		JEMECHIA

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.

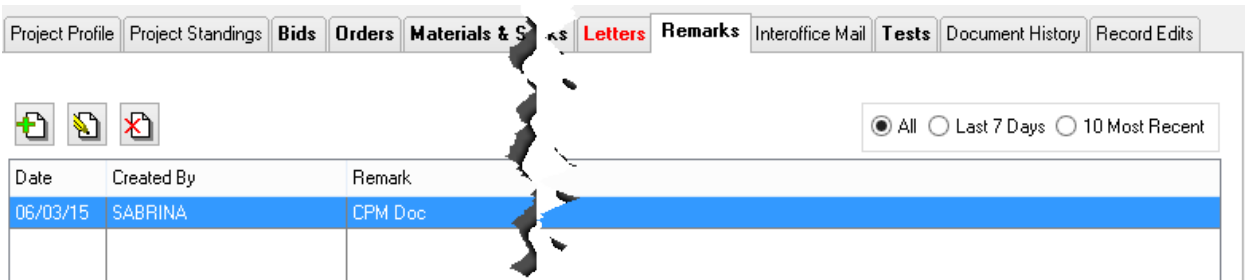


Letter Date	Due Date	Type	Regarding	Sent By	Assigned To
06/03/15		FREE FORM	CPM Doc	JEMECHIA	SABRINA

Remarks

This tab shows all related remarks to this project.

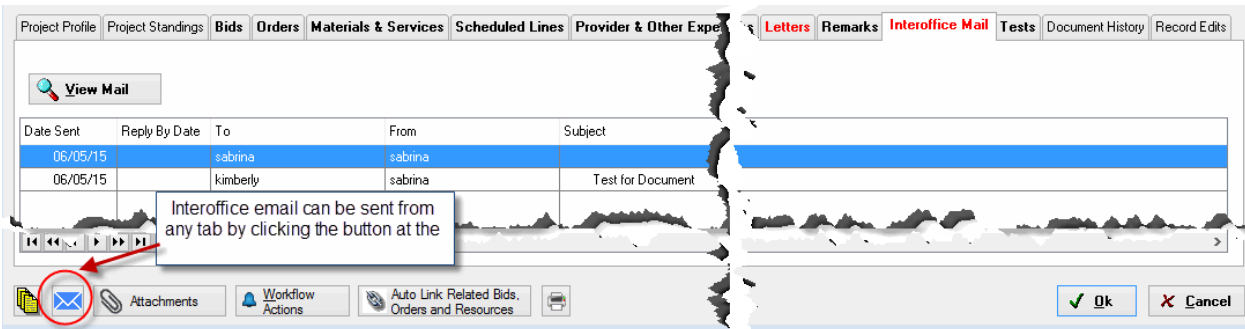
The filter on this screen is all, last 7 days or 10 most recent.



Date	Created By	Remark
06/03/15	SABRINA	CPM Doc

Interoffice Mail

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

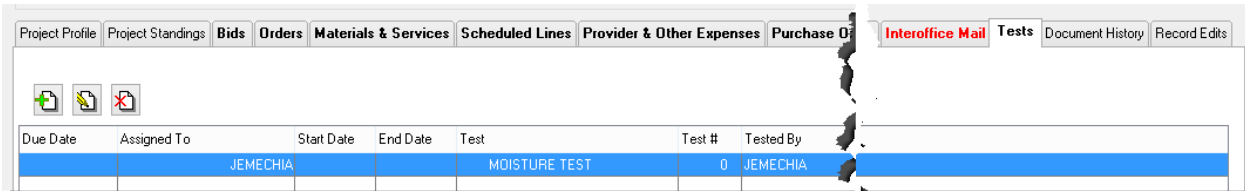


Date Sent	Reply By Date	To	From	Subject
06/05/15		sabrina	sabrina	
06/05/15		kimberly	sabrina	Test for Document

Tests

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

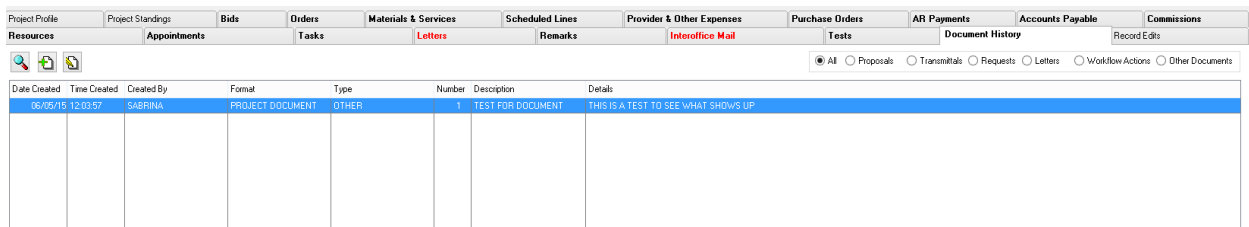
Currently the only test tracked is Moisture.



Due Date	Assigned To	Start Date	End Date	Test	Test #	Tested By
	JEMECHIA			MOISTURE TEST	0	JEMECHIA

Document History

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



Date Created	Time Created	Created By	Format	Type	Number	Description	Details
06/05/15	12:00:57	SABRINA	PROJECT DOCUMENT	OTHER	1	TEST FOR DOCUMENT	THIS IS A TEST TO SEE WHAT SHOWS UP



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

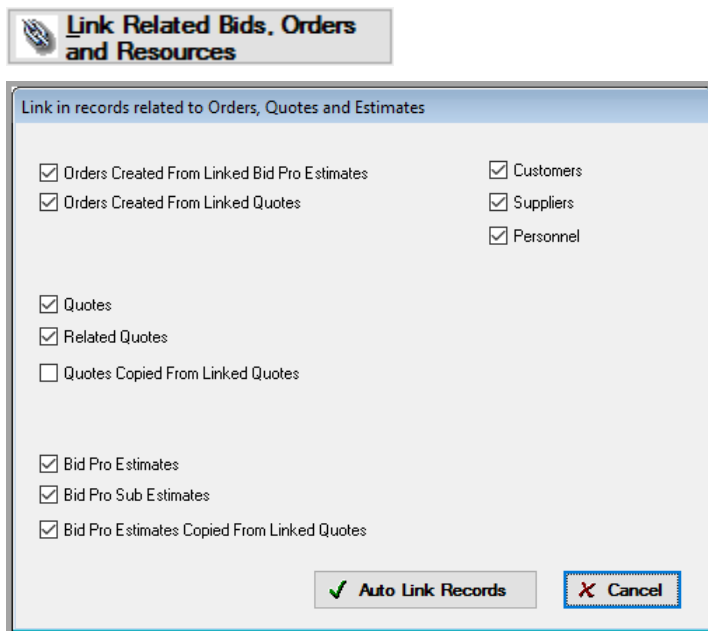
- To link an estimate, order or quote that has already been created, use the link button.
- If you link an order, quote or bid pro estimate using the primary button on the project it will automatically be added to the appropriate tab.

- 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

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

Line #	PC	Roll/Item #	Style/Item Name	Color	Qty	Price	Total	Status	Est Del Date
1	01	CG5020270001	DEUCE - HSC - INV - 1	MESQUITE	200.00	10.71	2,142.00	Job Costed	06/08/15
2	81	CP/B&G	CPT/BASIC/GLUEDD		150.00	0.69	103.50	Job Costed	06/08/15
3	03	CK129-00546	DISNEY RUGS	PEEL DU/PEDAL T	5.00	160.40	802.00	Job Costed	06/08/15

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.

Number	Type
CG900104	ORIGINAL ORDER
CG900105	ORIGINAL ORDER
CG900107	ORIGINAL ORDER

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					
<p>Customer:</p> <div style="border: 1px solid black; height: 100px; width: 100%;"></div> <p>Ship To: 740 Union Shopping Center Sand Destin FL 65112</p>		<p>Project Information:</p> <div style="border: 1px solid black; padding: 5px;"> 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: </div>					
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
<u>Line Notes</u>							
						Material Total:	\$14,051.48
						Labor Total:	\$257.25
						Misc Total:	\$0.00
						Tax Total:	\$1,334.89
						Proposal Total:	\$15,643.62
<u>Order Custom Notes</u>							

Figure: Proposal Report Sample

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

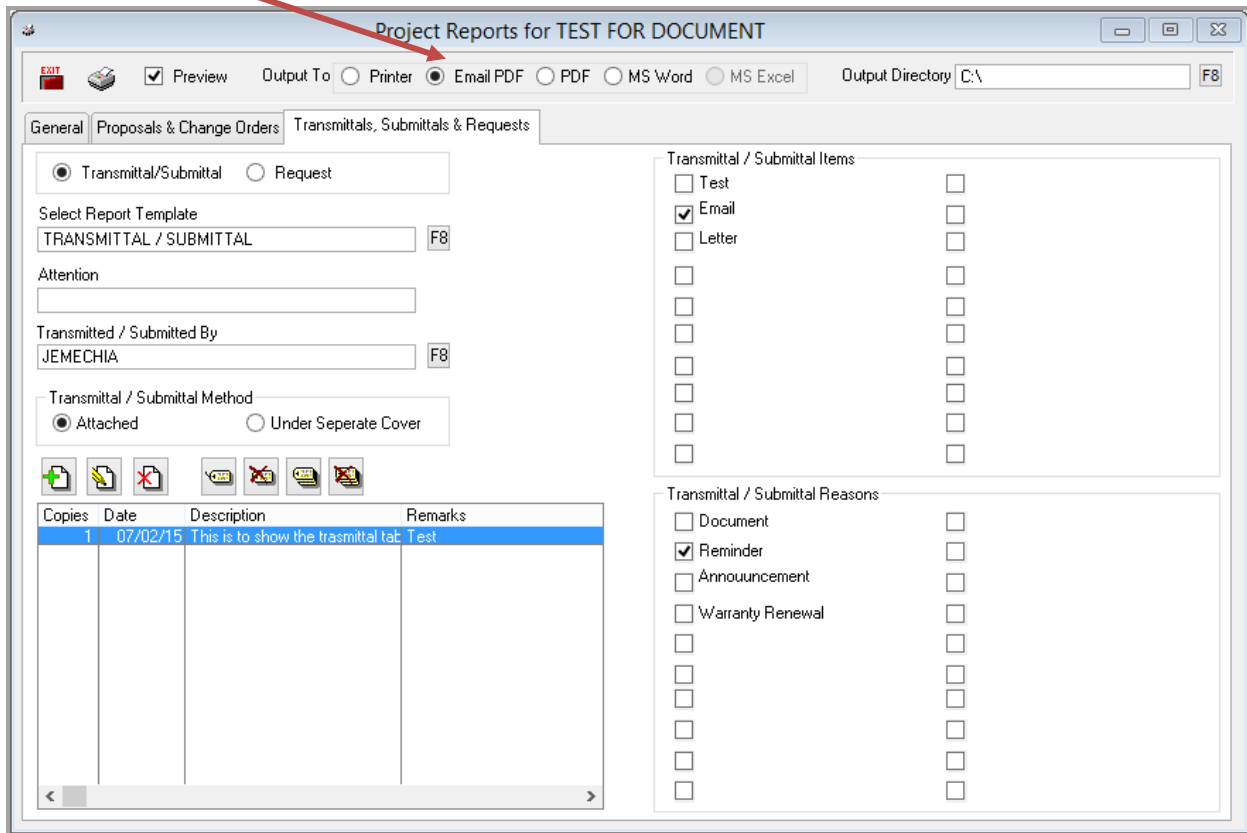
Transmittals, Submittals & Requests

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](#).



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