



Systems for Success

Sales Floor Assistant

User Guide

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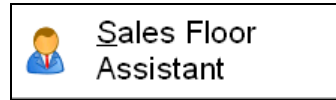
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Starting the Program

There are two ways to start the program

1. The installation program creates a shortcut icon that is located on the Windows Desktop.
2. Go to the RFMS Navigator screen.

Double-click on the Sales Floor Assistant icon to start the program.



When program is started, select "File", then choose from the menu.

Getting Started

Overview

Sales Floor Assistant by RFMS, Inc. is a software program that allows the user to easily lookup product and inventory information. This program is designed especially for a floor covering salesperson that needs easy access to inventory prices, product line and more. Sales Floor Assistant does not only provide a full list of inventory, but it also allows the attachment of files to selected products. On-line help is available throughout the program and may be accessed at anytime by pressing the <F1> key. This software package brings convenience as well as new innovation to the flooring showroom. Welcome to Sales Floor Assistant, another business management tool from RFMS.

Sales Floor Assistant is designed as a tool for use by salespersons while interfacing with customers on the sales floor. The customer is very likely also looking at the data. Some RFMS users even allow customers to access SFA on their own on the sales floors. As such it has by design limited access to confidential data.

Before using Sales Floor Assistant for the first time, set the [parameters](#).

The Main Sales Floor Assistant Screen

This is the Main Menu screen for Sales Floor Assistant. Any of the functions can be accessed simply by clicking on it using the mouse or by holding down the <Alt> key while pressing one of the underlined letters (hot keys).

File Menu Overview

The File menu allows:

[Viewing Orders](#) (Only if selected in [Utilities](#)>[Parameters](#)>[Switches](#))

If the switch is activated to view orders, viewing Change Orders, Overages, Lines, Notes or Receipts associated with the highlighted order is also possible. Printing a copy of the highlighted order is also an option. There are buttons on the SFA Tool bar for these functions.

[Lookup Roll Inventory](#)

Also available is the Roll History, Soft Reserves and Picture menus.

[Lookup Item Inventory](#)

Also available is the Item History, Soft Reserves and Picture menus.

[Lookup Product Information](#)

Print Setup

This selection allows selecting a printer for printing reports. The selection will remain until changed. Click the down arrow to change the current print device. Also change the properties of the selected printer. See the Windows help for more on Print Setup.

Edit Menu

Cut, Copy or Paste data to and from data entry fields.

Short Cut Key Combination	Result
Ctrl-C	Copy highlighted characters
Ctrl-X	Cut (remove) highlighted characters
Ctrl-V	Paste copied or cut characters

Window Menu

Options for the way multiple windows will appear on the screen.

Utilities Menu

Reset Windows Position – Reset Windows Position – this selection allows setting the size and position of the windows in Sales Floor Assistant back to the default settings.

System Options

X>Utilities>System Options>Sales Floor Assistant

This selection allows customizing Sales Floor Assistant. Various switches can be set for **individual users** that can restrict the access or display of certain data.

General

*X>Utilities>System Options>Sales Floor Assistant>General
Category Configuration*

Type- Can be Global, Assigned or User

Type	Module	Applies To	Category	Option	Value
User	Sales Floor Assistant	General	Configuration	Single Store to Process	"" - STORE NAME

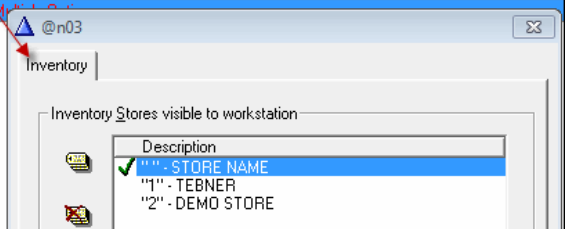
Single Store to Process

For more than one store code in RFMS, to select which store code this user will use as its default store. It will be marked with a green check mark on the Stores-Orders tab. The store entered here will automatically be an available store to view orders and inventory.

Inventory

X>Utilities>System Options>Sales Floor Assistant>Inventory

Type	Module	Applies To	Category	Option	Value
User	Sales Floor Assistant	Inventory	Configuration	Display "On Order" Inventory	Yes
User	Sales Floor Assistant	Inventory	Configuration	Display "Zero Available" Inventory	No
User	Sales Floor Assistant	Inventory	Display	Display Supplier in Inventory	No
User	Sales Floor Assistant	Inventory	Display	Inventory Stores Visible to User	"" - STORE NAME



Category Configuration

Display "On Order" Inventory

Type- Can be Global, Assigned or User

If this setting is set to Yes, inventory that is on order will be included in displays.

Display "Zero Available" Inventory

Type- Can be Global, Assigned or User

If this setting is set to Yes, records with a zero physical inventory balance will be included in displays.

Category Display

Display Supplier in Inventory

Type- Can be Global, Assigned or User

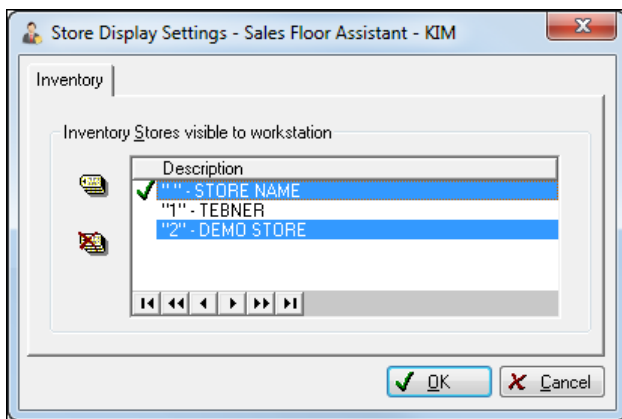
When this setting is set to Yes, records display the supplier's name and description from the data file. With it set to know dashes will be in the display.

Inventory Visible to Workstation

Type-Must be Assigned or User

This option is independent of the way this user may be set in BCOE.

- Tagged stores (highlighted) are those that will be available for viewing to the user.
- The green check indicates the default Store. The default Store is always included in available Order Stores. If the default store is changed, the check mark will automatically be moved to the new designated default store and select it. The old default Store will remain as one of your selected stores.
- The red "X" indicates an Inactive Store. For Inventory Stores, all designated Stores will be available whether Active or Inactive, if it has available Inventory.
- Pressing the multiple-tag button will tag all Stores.
- Pressing the multiple-untag button will untag all Stores except the default Store.



Invoices

X>Utilities>System Options>Sales Floor Assistant>Invoices
Category Reporting

Type	Module	Applies To	Category	Option	Value
User	Sales Floor Assistant	Invoices	Reporting	Install Order Image	Multiple Options


Install Order Image

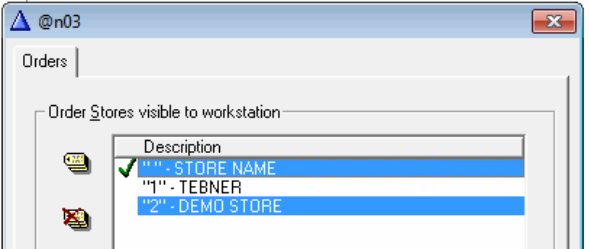
Type- Can be Global, Assigned or User

The “View Customer Order” option which applies to Order Entry must be activated in order to use this option. Upon doing so, an image can be added to a customer invoice from the SFA module.

Order Entry

X>Utilities>System Options>Sales Floor Assistant>Order Entry

Type	Module	Applies To	Category	Option	Value
User	Sales Floor Assistant	Order Entry	Configuration	View Customer Orders	Yes
 User	Sales Floor Assistant	Order Entry	Display	Order Stores Visible to User	Multiple Options



Category Configuration

View Customer Orders

Type- Can be Global, Assigned or User

Setting this option to Yes, allows viewing RFMS Customer Orders from the SFA module.

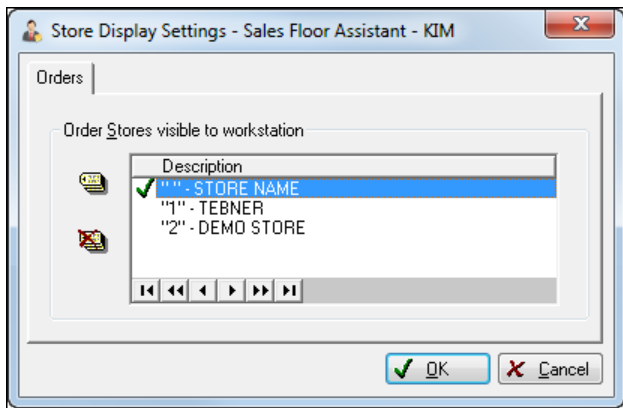
Category Display

Order Stores Visible to Workstation

Type-Must be Assigned or User 

This option is independent of the way this user may be set Order Entry.

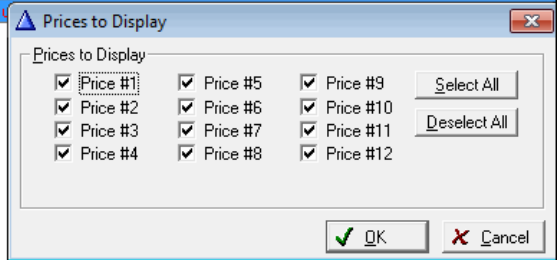
- In order to insure continuity of the user’s choices, if “Only Default Store Invoices” was checked, the list will automatically populate with only the default Store tagged, even if the user has not been in Private Parameters.
- Tagged stores (highlighted) are those that will be available to the workstation.
- The green check indicates the default Store. The default Store is always included in available Order Stores. If the default store is changed, the check mark will automatically be moved to the new designated default store and select it. The old default Store will remain as one of your selected stores.
- The red “X” indicates an Inactive Store.
- Pressing the multiple-tag button will tag all Stores.
- Pressing the multiple-untag button will untag all Stores except the default Store.



Products-Display

*X>Utilities>System Options>Sales Floor Assistant>Products
Category Display*

Type	Module	Applies To	Category	Option	Value
User	Sales Floor Assistant	Products	Display	Display Inactive Colors	Yes
User	Sales Floor Assistant	Products	Display	Display Inactive Products	No
User	Sales Floor Assistant	Products	Display	Display Item Cost	Yes
User	Sales Floor Assistant	Products	Display	Display Item Manufacturer Description	No
User	Sales Floor Assistant	Products	Display	Display Item Mill Account	No
User	Sales Floor Assistant	Products	Display	Display Item Vendor	Both
User	Sales Floor Assistant	Products	Display	Display Roll Cost	Yes
User	Sales Floor Assistant	Products	Display	Display Roll Cut Cost	Yes
User	Sales Floor Assistant	Products	Display	Display Roll Manufacturer	No
User	Sales Floor Assistant	Products	Display	Display Roll Manufacturer Color	No
User	Sales Floor Assistant	Products	Display	Display Roll Mill Account	No
User	Sales Floor Assistant	Products	Display	Display Roll Supplier Style	Yes
User	Sales Floor Assistant	Products	Display	Display Service Description	No
User	Sales Floor Assistant	Products	Display	Display Service Unit Cost	No
User	Sales Floor Assistant	Products	Display	Price Levels To Display	Mu



Display Inactive Colors

Type- Can be Global, Assigned or User

Set this option to Yes, to show inactive colors in the browse list. They will be gray.

Display Inactive Products

Type- Can be Global, Assigned or User

Set this option to Yes, to show inactive products in the browse list. They will be gray.

Item Products

Display Item Cost

Type- Can be Global, Assigned or User

Set this option to Yes, to show the item product cost in the browse list.

Display Item Manufacturer Description

Type- Can be Global, Assigned or User

Set this option to Yes, to show the item product manufacturer description in the browse list.

Display Item Mill Account

Type- Can be Global, Assigned or User

Set this option to Yes, to show the item product mill account number in the browse list.

Display Item Vendor Display

Type- Can be Global, Assigned or User

Sales Floor Assistant can display the manufacturer name and the supplier name when viewing item records from the Products file. Select one option from the pick list. The options are:

- Manufacturer Name Only
- Supplier Name Only
- Both Names
- Neither Names (asterisks will appear in both designated fields)

Display Roll Cost

Type- Can be Global, Assigned or User

Set this option to Yes, to show the roll product cost in the browse list.

Display Roll Cut Cost

Type- Can be Global, Assigned or User

Set this option to Yes, to show the roll product cut cost in the browse list.

Display Roll Manufacturer

Type- Can be Global, Assigned or User

Set this option to Yes, to show the roll product manufacturer in the browse list.

Display Roll Manufacturer Color

Type- Can be Global, Assigned or User

Set this option to Yes, to show the roll product manufacturer color in the browse list.

Display Roll Mill Account

Type- Can be Global, Assigned or User

Set this option to Yes, to show the roll product mill account number in the browse list.

Display Roll Supplier Style

Type- Can be Global, Assigned or User

Set this option to Yes, to show the roll product supplier style in the browse list.

Display Service Description

Type- Can be Global, Assigned or User

Set this option to Yes, to show the service description in the browse list.

Display Service Unit Cost

Type- Can be Global, Assigned or User

Set this option to Yes, to show the service unit cost in the browse list.

Price Levels to Display

Type- Can be Global, Assigned or User

Prices 1 through 12 correspond to the pricing formulas set up in the RFMS Products module. Set the option to

Yes to display the selling price when the **Price button**  is clicked while displaying the products file.

Units-Configuration

X>Utilities>System Options>Sales Floor Assistant>Units

Category Configuration

Square Foot Calculations

Type- Can be Global, Assigned or User

Elect to enter quantity, costs and selling prices into RFMS in square feet. To do this, set this option to Yes. If already using the system and change to square foot calculations, several areas are affected:

- When entering selling prices on the roll inventory record, the price should be entered as the square foot price.
- All printouts will accommodate square foot indications.
- If Products formulas have been altered to figure square foot selling prices by adding a "divide by 9" calculation, be sure to remove that math statement from all formulas.

This change can be verified by looking at the bottom of the screen.

United States, Square Yards

Calculator

[Click here for details.](#)

Calendar

[Click here for details.](#)

Price Check

[Click here for details.](#)

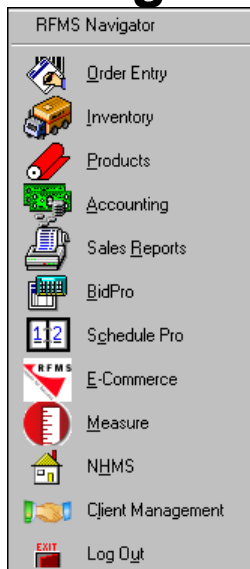
Reset Windows Position

This selection allows resetting the size and position of windows in Sales Floor Assistant. For example, if you had chosen to display in a tiled mode, you could select the Reset Windows Position utility to return to the default display.

Help Menu

Accesses the on-line help feature.

Navigator











Click the module name to be taken to that section.

File Menu Details

Customer Orders

Toolbar

Button	Function
	Exits Customer Orders
	Access the Help File
	These options are not accessible via SFA
	View lines for the highlighted order
	View notes for the highlighted Order (cannot be edited here.)
	View receipts for the highlighted Order
	Print a copy of the highlighted order
	Send RFMS Internal mail or email in reference to the highlighted record.

Roll Inventory

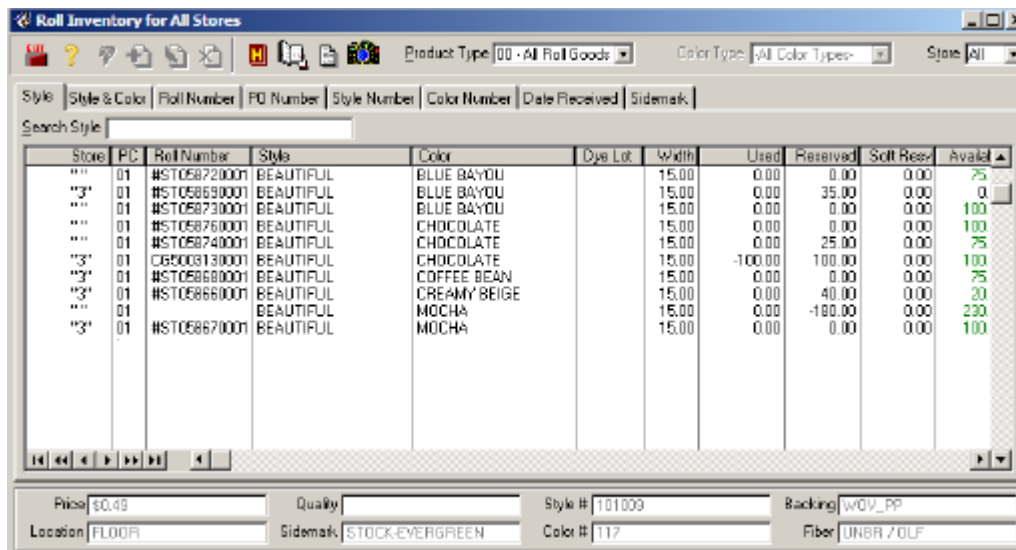
This selection displays the roll inventory file as entered in RFMS Roll Inventory. Editing or deleting records is not possible through Sales Floor Assistant.

Display the entire file or filter the records by product code (carpet or vinyl). The sort order of the list can be changed by clicking on one of the sort tabs.

You may view any digital photographs attached to an inventory record by clicking on the camera icon. If the camera icon is grayed out, it means that there are no pictures attached to the highlighted inventory record.

To display the roll inventory file:

1. Click on File.
2. Click on Roll Inventory.



Field Explanations - Roll Inventory

Product Code

Click on the down arrow to select a product code from the drop down list. IF THE PRODUCT CODE FIELD IS BLANK, NO RECORDS WILL DISPLAY.

Store Filter

Clicking in this box will cause the system to list only inventory with the default store code. The default store code is set on the parameters screen. If this box is unchecked, inventory from all store codes will display. If the Exclude Other Store Inventory switch is on (as set in parameters under the Utilities menu), the Store Filter field will be grayed out and unchangeable.

Sort Tabs

The records in the list can be sorted by clicking on one of the tabs. Choices are:

- Style Name
- Style & Color*
- Roll Number
- Purchase Order Number
- Style Number
- Color Number
- Date Received
- Sidemark



Notes:

If a particular inventory record is highlighted and the sort order is changed, the list will re-sort but will retain the highlighting on the selected record.

* The **Style & Color** tab selects only the highlighted style and allows searching by colors within that style.


Searching for a Roll

To find a particular roll record, enter some characters into the search field at the top of the display screen. The sort tab will dictate the search. For example, click on the Sidemark tab, the search field will be looking for entries in the Sidemark fields to find a match. After typing in your search criteria, press the <TAB> key to perform the search. The system will highlight the first record it finds as a match.

Information displayed:

- Price
- Location
- Quality
- Style Number
- Color Number
- Backing
- Fiber

Other Options while Viewing Roll Inventory

 Roll History – Displays the history for a highlighted roll record. The history icon will be grayed out if there is no history for the record.



Soft Reserves – Add, edit or delete a soft reserve for the highlighted roll record. The soft reserve icon will be grayed out if there are no soft reserves for the record.



Attachments – Displays files attached to the highlighted roll record. The attachment icon will be grayed out if there are no files attached to the record.



Notes:

See Maintaining Attachments for help on adding files. If the file is large, it may take a few seconds to display after clicking on the attachment icon.

Item Inventory

This selection displays the item inventory file as entered in RFMS Item Inventory. Editing or deleting records is not possible through Sales Floor Assistant.

You may display the entire file or you may filter and sort the records by clicking on one of the sort tabs. See [Sorting and Searching Item Inventory](#).

You may view any digital photographs attached to an inventory record by clicking on the camera icon. If the camera icon is grayed out, it means that there are no files attached to the highlighted inventory record.

To display the item inventory file:

1. Click on File.
2. Click on Item Inventory.

Field Explanations - Item Inventory

All information displayed comes from the Inventory record in RFMS.

Price

This is the selling price that is entered on the Item Inventory record. It is not any of the selling prices entered in the Products module.

Location

The location indicates where the inventory is physically located. This field may be blank if your store does not track locations for inventory.

Units

The unit of measure in which this inventory is sold.

User Label Field

The name of this field will vary. You can change the name to something meaningful to you. The name of the label is changed on the item inventory screen in RFMS. When you change the label for one record, it applies to all item inventory records. For example, you could name this field "Size" and use it to enter Rug sizes.

Lading No.

This is the bill of lading number on which the items were received by the supplier.


PO Number

This is the purchase order number of the inventory.

Searching for an Item

To find a particular item record, you may enter some characters into the search field at the top of the display screen. The sort tab that you selected will dictate the search. For example, if you have clicked on the Bill of Lading number tab, the search field will be looking for entries in the Bill of Lading field to find a match. After typing in your search criteria, press the <TAB> key to perform the search. The system will highlight the first record it finds as a match.

Other Options while Viewing Item Inventory

 **Item History** – Displays the history for a highlighted item record. The history icon will be grayed out if there is no history for the record.



Soft Reserves – Add, edit or delete a soft reserve for the highlighted Item record. The soft reserve icon will be grayed out if there are no soft reserves for the record.



Attachments – Displays files attached to the highlighted item record. If the camera icon grayed out, there are no files attached to the record. See [Maintaining Attachments](#) for help on adding files.



Notes:

If the file is large, it may take a few seconds to display after clicking on the attachment button.

Sorting and Searching Item Inventory

Store Filter

Clicking in this box will cause the system to list only inventory with the default store code. The default store code is set on the parameters screen. If this box is unchecked, inventory from all store codes will display. If the Exclude Other Store Inventory switch is on (as set in parameters, under the Utilities menu), the Store Filter field will be grayed out and unchangeable.

Sort Tabs

The records in your list can be sorted by clicking on one of the tabs. Your choices are:

- Item Number
- Product Code & Item Name
- Bill of Lading Number
- User Defined Field
- Purchase Order Number
- Supplier Name
- Reference Number



Notes:

If you have a particular inventory record highlighted and you change the sort order, the list will re-sort but will retain the highlighting on the selected record.

Looking up Product Codes

To display a listing of the product code list on the Product Code Sort tab. While sorted by Product Code, you may display a listing of all product codes.

To look up product codes:

Click on the <F8> button to the right of the Product Code field. If you are on the Item Inventory screen, you must click on the Product Code Sort tab to access the Product Code Lookup <F8> button.


To do a text search, click in the Search Filter field and type in a few characters of the product code description you are looking for. Press the <TAB> button and the first match will be highlighted.

To do a search by product code, click on the Find Product Code field arrows to move up or down. Press <TAB> to execute the search.

Inventory History

Activity for an inventory product may be displayed. On Order inventory will have no history.

To display history for inventory:

1. Click on File, and then select either Roll Inventory or Item Inventory.
2. From the inventory display screen, click on the desired inventory record.
3. Click on the History icon. 

Soft Reserves

Soft Reserves



File> Roll Inventory or Item Inventory

The Soft Reserves button is located on the toolbar of each of these screens. This selection allows the entry of soft reserves against inventory.

Adding Soft Reserves

From the inventory display screen, highlight the inventory record for which you want to place a soft reserve. Click on the Soft Reserve button.

Click on the Add icon.

Fill in the appropriate information as described under [Field Explanations](#).

Field Explanations - Soft Reserves



Inventory Module>File>Purchase Orders>Roll Inventory, or Item Inventory.

The Soft Reserves button is located on the toolbar of each of these screens.

This selection allows the entry of soft reserves against inventory.

First Name

Enter the first name of the customer.

Last Name

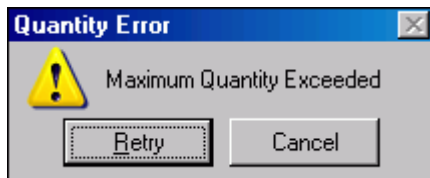
Enter the last name of the customer.

Sales Rep

Enter the name of the selling representative or click on the lookup button to pick from the existing sales person file. (This file is created in RFMS and cannot be added to or edited in Sales Floor Assistant.)

Length/Quantity

Enter the length of the product being reserved. Skipping entry in the length field and proceeding to the **quantity** field will automatically fill in the length field. The **quantity** field has an all button next to it. Click it to enter the total of the material in the reserved amount. The amount reserved cannot exceed the maximum amount shown. If the maximum is exceeded, a warning message will be displayed.



If cancel is clicked the system will revert to the **Soft Reserve** screen. If retry is clicked the system will automatically populate the length with the maximum length and allow a new value to be entered.

Decimal to Inches Conversion

If you enter a length with an odd amount to the right of the decimal point, a [conversion](#) chart will appear. The system will estimate to the closest inch. You may accept the suggestion or you may select your own from the chart.

Start Date

Enter the starting date of the reserve or you may press the **F8** key to access the on-line [calendar](#).

Reserve Days

Enter the number of days the reserve is to be in effect. You can skip this entry and enter the expiration date instead. The system will calculate the number of reserve days based upon the Start and Expiration Dates entered.

Expiration Date

Enter the date on which the soft reserve will expire. Or, you may enter the Start Date and the number of Reserve Days and the system will calculate the expiration date automatically. You may also press the **F8** key to access the on-line calendar.

Changing Soft Reserves

From the inventory display screen, highlight the inventory record that contains the soft reserve.



Click on the Soft Reserves icon.



Click on the Edit icon.

Edit the desired information.

Clearing Expired Soft Reserves

Soft reserves are not automatically removed from the system. However, once the expiration date has passed, the reserve will no longer appear on inventory display screens or on reports. It is a good idea to periodically remove old soft reserve records.

Clearing individual Reserves

From the inventory display screen, highlight the inventory record that contains the soft reserve.



Click on the Soft Reserves icon.

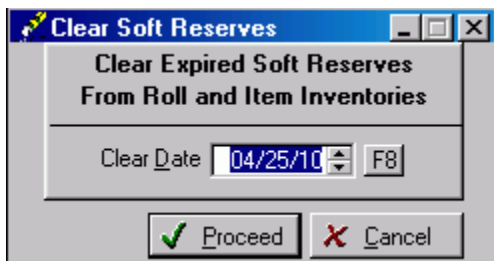


Click on the Delete icon.

Click on Yes when asked to confirm the deletion.

Clearing Soft Reserves Routine

*Soft Reserves Icon>Clear Soft Reserves Icon or
In SFA> Edit>Soft Reserves>Edit-Clear Soft Reserves*



On the clear soft reserves screen enter the date for expired date to use as a cut-off for clearing. You will not be able to clear reserves with an expiration date further in the future than yesterday's date.

Soft Reserves

Soft Reserves



File> Roll Inventory or Item Inventory

The Soft Reserves button is located on the toolbar of each of these screens. This selection allows the entry of soft reserves against inventory.

Adding Soft Reserves

From the inventory display screen, highlight the inventory record for which you want to place a soft reserve.

Click on the Soft Reserve button.

Click on the Add icon.

Fill in the appropriate information as described under [Field Explanations](#).

Field Explanations - Soft Reserves



Inventory Module>File>Purchase Orders>Roll Inventory, or Item Inventory.

The Soft Reserves button is located on the toolbar of each of these screens.

This selection allows the entry of soft reserves against inventory.

First Name

Enter the first name of the customer.

Last Name

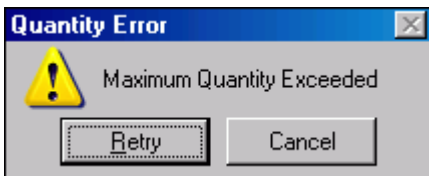
Enter the last name of the customer.

Sales Rep

Enter the name of the selling representative or click on the lookup button to pick from the existing sales person file. (This file is created in RFMS and cannot be added to or edited in Sales Floor Assistant.)

Length/Quantity

Enter the length of the product being reserved. Skipping entry in the length field and proceeding to the **quantity** field will automatically fill in the length field. The **quantity** field has an all button next to it. Click it to enter the total of the material in the reserved amount. The amount reserved cannot exceed the maximum amount shown. If the maximum is exceeded, a warning message will be displayed.



If cancel is clicked the system will revert to the **Soft Reserve** screen. If retry is clicked the system will automatically populate the length with the maximum length and allow a new value to be entered.

Decimal to Inches Conversion

If you enter a length with an odd amount to the right of the decimal point, a [conversion](#) chart will appear. The system will estimate to the closest inch. You may accept the suggestion or you may select your own from the chart.

Start Date

Enter the starting date of the reserve or you may press the **F8** key to access the on-line [calendar](#).

Reserve Days

Enter the number of days the reserve is to be in effect. You can skip this entry and enter the expiration date instead. The system will calculate the number of reserve days based upon the Start and Expiration Dates entered.

Expiration Date

Enter the date on which the soft reserve will expire. Or, you may enter the Start Date and the number of Reserve Days and the system will calculate the expiration date automatically. You may also press the **F8** key to access the on-line calendar.

Changing Soft Reserves

From the inventory display screen, highlight the inventory record that contains the soft reserve.



Click on the Soft Reserves icon.



Click on the Edit icon.

Edit the desired information.

Clearing Expired Soft Reserves

Soft reserves are not automatically removed from the system. However, once the expiration date has passed, the reserve will no longer appear on inventory display screens or on reports. It is a good idea to periodically remove old soft reserve records.

Clearing individual Reserves

From the inventory display screen, highlight the inventory record that contains the soft reserve.



Click on the Soft Reserves icon.

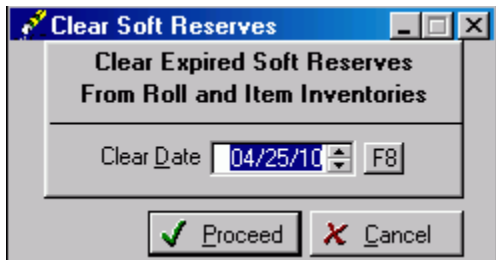


Click on the Delete icon.

Click on Yes when asked to confirm the deletion.

Clearing Soft Reserves Routine

*Soft Reserves Icon > Clear Soft Reserves Icon or
In SFA > Edit > Soft Reserves > Edit-Clear Soft Reserves*



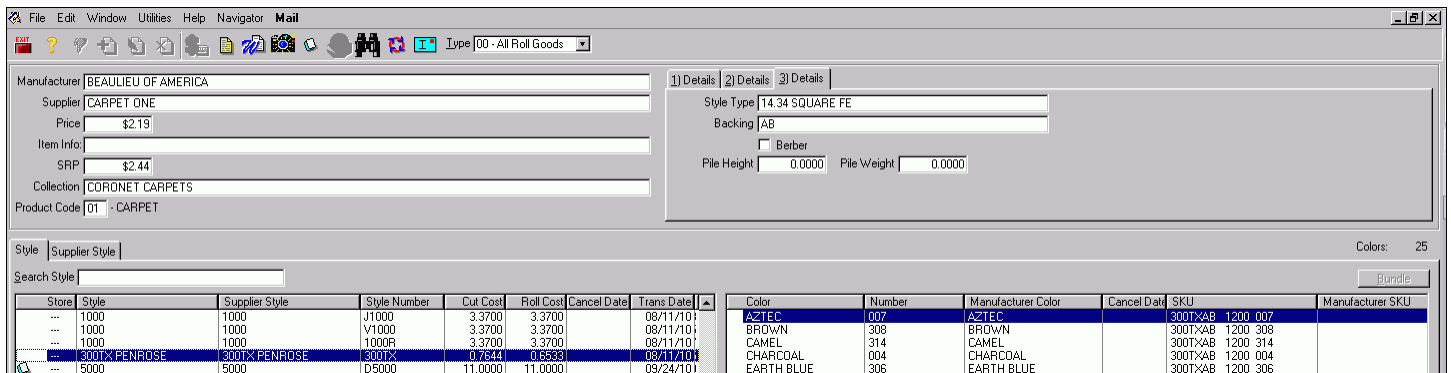
On the clear soft reserves screen enter the date for expired date to use as a cut-off for clearing. You will not be able to clear reserves with an expiration date further in the future than yesterday's date.

Products

File > Products > (Rolls Items or Services)

This selection allows the lookup of records in the RFMS Products file. The Products file consists of pricing and vendor information for rolls, items and services. This file is usually used to obtain information on products which are normally special ordered.

The product display screen appears and will look different depending upon your selection of rolls, items or services.



Looking up Product Information for Rolls

The Product Information for rolls is divided into basically two columns. The column on the left contains the style name. The column on the right contains any color names and color numbers associated with that style.

Searching - Product Information for Rolls

Filter or search using a combination of two functions:

1. Click on the down arrow to the right of the Product Type field at the top of the screen to filter either a) all roll goods, b) rolls only or c) vinyl only.
 2. In addition, click or press <Alt-P> to position the cursor inside the Search Style field. Enter a few characters of the desired style name and press the <TAB> key to initiate the search.
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Field Explanations - Roll Products

Along with the style name and colors, other product information is displayed. They include the following:

Supplier

This is the **private** supplier name from which you purchase this product.

Product Code

The entry here is either 01 for carpet or 02 for vinyl.

Price

This is price #1 as entered on the products record in the RFMS Products module, under option 9> Prices.

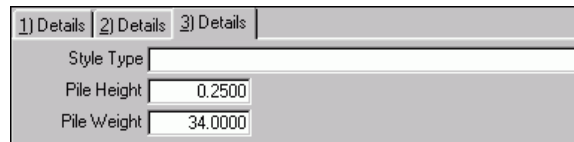
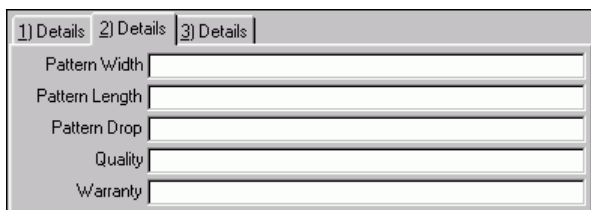
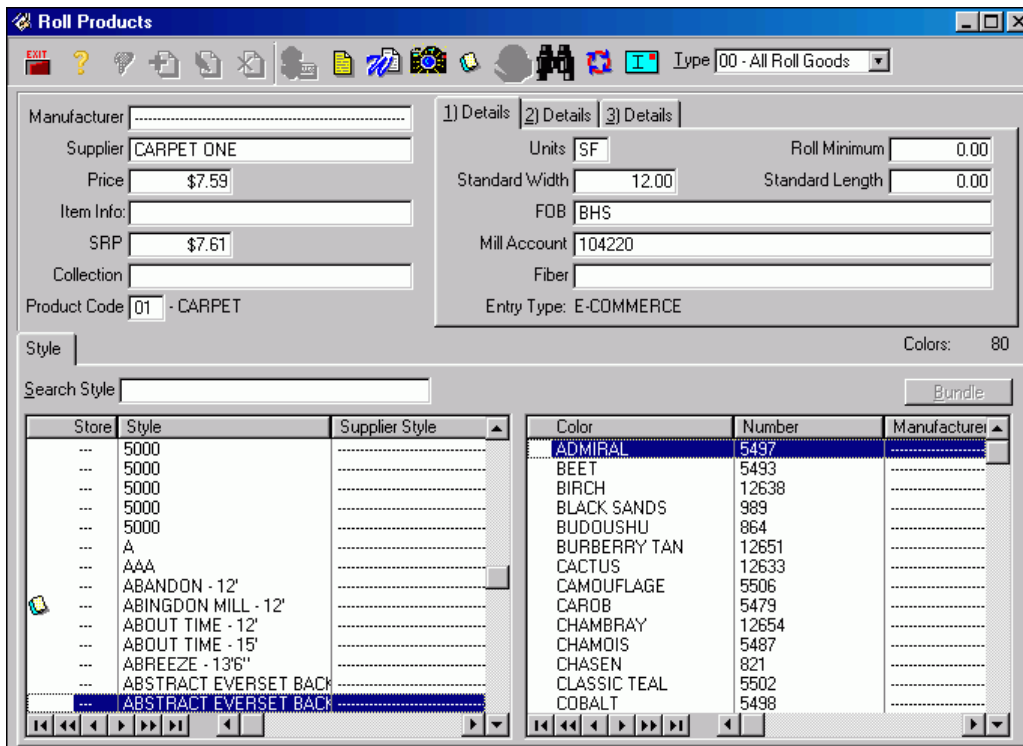
Units

This is the unit of measure by which this product is sold, either square feet or square yards. To change the calculation, go to Utilities, Parameters.

Rolls

In version 10.6, an additional detail tabs was added to include the following information:

- * Fiber
- * Backing
- * Quality
- * Warranty
- * Berber
- * Style type



Looking up Product Information for Items

The Product Information for items is divided into basically four columns. Column one lists the item name, column two lists the item number, column three lists the description and column four lists the description number.

Searching - Product Information for Items

Filter or search for items either by the Item Name or the Item Number.

Click on the Item Name Sort Tab to search by name. Press <Alt-F> or click inside the Search Item Name field. Enter in a few characters of the item name and press the <TAB> key to initiate the search.

Click on the Item Number Sort Tab to search by Item Number. Press <Alt-F> or click inside the Find Item Number field. Enter in a few characters of the item number and press the <TAB> key to initiate the search.

Field Explanations - Item Products

Along with the item name, number and description, other product information is displayed. They include the following:

Manufacturer

This is the name of the manufacturer who makes this product. If this field displays asterisks, it is because it has been set that way in Parameters, Item Product Vendor Display.

Supplier

This is the **private** supplier name from which you purchase this product. If this field displays asterisks, it is because it has been set that way in Parameters, Item Product Vendor Display.

Product Code

This is the product code number for this product, ranging from 03 to 79.

Price

This is price #1 as entered on the products record in the RFMS Products module, under option 9> Prices.

Units

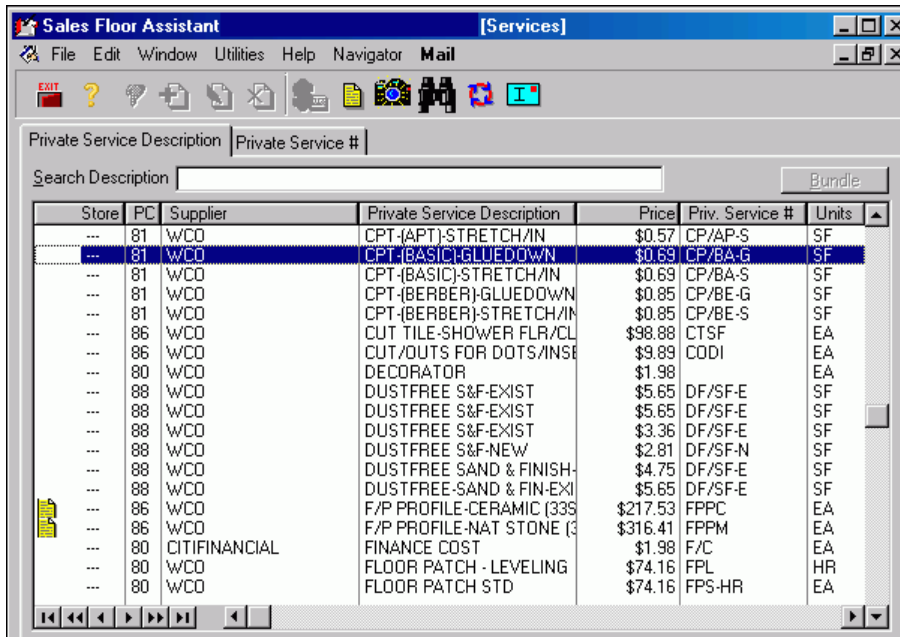
This is the unit of measure by which this product is sold.

User Defined Label

This is a "free field" that is customized by the user. You may change the name of the data field in the RFMS Products module to reflect something meaningful to you.

Services

File>Products>Services



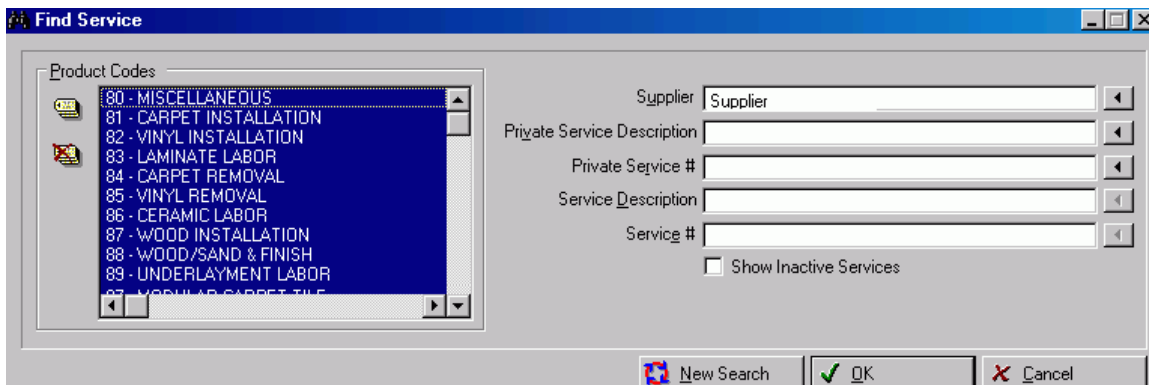
Store	PC	Supplier	Private Service Description	Price	Priv. Service #	Units
---	81	WCO	CPT-(APT)-STRETCH/IN	\$0.57	CP/AP-S	SF
---	81	WCO	CPT-(BASIC)-GLUEDOWN	\$0.69	CP/BA-G	SF
---	81	WCO	CPT-(BASIC)-STRETCH/IN	\$0.69	CP/BA-S	SF
---	81	WCO	CPT-(BERBER)-GLUEDOWN	\$0.85	CP/BE-G	SF
---	81	WCO	CPT-(BERBER)-STRETCH/IN	\$0.85	CP/BE-S	SF
---	96	WCO	CUT TILE-SHOWER FLR/CL	\$98.88	CTSF	EA
---	96	WCO	CUT/OUTS FOR DOTS/INSE	\$9.89	CODI	EA
---	90	WCO	DECORATOR	\$1.98		EA
---	88	WCO	DUSTFREE S&F-EXIST	\$5.65	DF/SF-E	SF
---	88	WCO	DUSTFREE S&F-EXIST	\$5.65	DF/SF-E	SF
---	88	WCO	DUSTFREE S&F-EXIST	\$3.36	DF/SF-E	SF
---	88	WCO	DUSTFREE S&F-NEW	\$2.81	DF/SF-N	SF
---	88	WCO	DUSTFREE SAND & FINISH-	\$4.75	DF/SF-E	SF
---	88	WCO	DUSTFREE-SAND & FIN-EXI	\$5.65	DF/SF-E	SF
---	96	WCO	F/P PROFILE-CERAMIC (335	\$217.53	FPPC	EA
---	96	WCO	F/P PROFILE-NAT STONE (3	\$316.41	FPPM	EA
---	80	CITIFINANCIAL	FINANCE COST	\$1.98	F/C	EA
---	80	WCO	FLOOR PATCH - LEVELING	\$74.16	FPL	HR
---	80	WCO	FLOOR PATCH STD	\$74.16	FPS-HR	EA

Display a listing of services as entered in RFMS.

To look up service descriptions:

Click on the <F8> button to select a lookup a different service product code.

Click the **find** button in the **services** browse. Use the **tag** buttons to limit the product codes selected. High light a service record then use the **arrow** buttons to copy information from that record.



Product Codes

- 80 - MISCELLANEOUS
- 81 - CARPET INSTALLATION
- 82 - VINYL INSTALLATION
- 83 - LAMINATE LABOR
- 84 - CARPET REMOVAL
- 85 - VINYL REMOVAL
- 86 - CERAMIC LABOR
- 87 - WOOD INSTALLATION
- 88 - WOOD/SAND & FINISH
- 89 - UNDERLAYMENT LABOR
- 90 - WOOD/LAM CARPET TILE

Supplier: Supplier

Private Service Description: _____

Private Service #: _____

Service Description: _____

Service #: _____

Show Inactive Services

New Search OK Cancel

Figure: Service Search

Looking up Product Information for Services

The Product Information for services displays the product code, supplier name, service description, selling price and the unit of measure for service codes. These codes and descriptions are entered in the RFMS Products module. When you enter this screen, product code 80 will display (because 80 is the first in the list). If you wish to view all product codes (codes 80 through 98), click on the ALL SERVICES tab.

Searching - Product Information for Services

You may filter or search for services either by the Service Supplier or the Service Description.

Click on the Product Code & Supplier Tab to search by supplier. Press <Alt-F> or click inside the Find Supplier field. Enter in a few characters of the item name and press the <TAB> key to initiate the search. **BE SURE YOU HAVE THE CORRECT PRODUCT CODE SELECTED.** If the product code is no correct, the system will not find a match.

To change the product code, click on the <F8> button and select a product code from the list.

Click on the All Services Tab to search by the Service Description. Press <Alt-S> or click inside the Select Service Description field. Enter in a few characters of the item number and press the <TAB> key to initiate the search. This search is useful if you know the name of the service but are unsure of the product code or supplier.

Displaying Selling Prices for Products

If you use the formula feature in RFMS Products to calculate selling prices for your products, those prices can be displayed in Sales Floor Assistant. Up to six prices or formulas may be entered for each product in the RFMS Products module. If you do not have prices or formulas entered, zeros will be displayed.

To display selling prices:


Click on File, and then select Products.

Click on Rolls, Items or Services.

The product display screen appears and will look different depending upon your selection of rolls, items or services.

Search for the desired product record.

Click on the desired product record.

Click on the Prices icon at the top of the screen. 

The prices as entered on the Products record in RFMS will display. Click on OK to return to the display screen.