



Systems for Success

A large decorative graphic on the right side of the page, consisting of three overlapping, wavy, curved bands. The top band is light gray, the middle band is dark red, and the bottom band is black. The bands curve upwards from left to right.

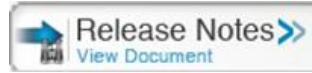
Version 12.0 Update User Guide

Release Date 1/09/13
1st Revision Date 1/24/13
2nd Revision 2/13/2013

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This update to the Windows version of the RFMS Business Management System includes many new features and enhancements. The update also includes many "behind the scenes" changes that increase processing speed and other performance related functions. This document explains only the new features contained in this update. For all changes see the release notes on the download

webpage. Click the release notes button to find these.






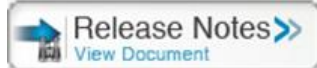
To see what you may have missed in previous updates click here.
































[For directions on loading updates to the RFMS software, click here.](#)


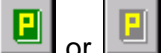
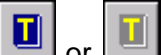


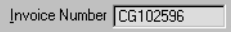

The same documentation is included in the on-line help system and can be accessed by pressing the F1 button at any RFMS screen. If there is something on the screen that you either don't recognize or understand, check this document or refer to the Help Files pressing F1.

Documentation Conventions

 <p>Notes:</p>	Indicates extra Information
	This symbol indicates a best practice, or an example.
<p><u>Setup</u>>System Setup</p>	Indicates Menu item shortcuts: An underlined letter indicates this is a "hot key". On Main menus click the Alt button plus that key to go directly to that field or function. On Drop Down menus just type that key.
<p>Field Name</p>	Indicates a Field Name or button Name
<p>Important</p>	Important information
<p>Screen Shots</p>	To conserve space the screen shots are seldom actual size and may have blank spaces or other non essential information cropped from them.
	Links to other documents or web pages are included when additional explanations are available. Click the notebook to find that information.
<p>Links to other topics</p>	Various places in this document have links to other topics in the document. To return to the original topic click Alt + left arrow. Try it out with the link to the left!
<p>Update Release Notes</p>	<p>Update documents contain only the new features contained the software updates. For all changes see the release notes on the download webpage.</p> <p>Click the release notes button to find these.</p> 

RFMS Button and Menu Conventions

 	Exit the current screen.
	Access the help file.
	Activates or selects the highlighted record.
 	Add a new record.
 	Make changes to a record.
 	Delete a record.
 	Add or View Notes on a record.
	View all notes and Client Management Remarks related to a record.
 	Find a record using specific fields. Changes to blue when a find is in process.
 	Resets a filter.
	Refresh the browse without resetting the filters
	Saves the current information and exits the screen.
	Exits the screen without saving the newly entered information.
	Exact match required in a search.
	Partial match only required in a search.
 or Ctrl-S	Text search Reminder: this searches the browse list from the highlighted record down only. When beginning a search it is best to begin at the top of list.
 	Print a document or go to a report menu.
	Allows adding, changing or deleting graphic and non-graphic files.
	Tag Untag Tagall or Un-tagall record(s). Selects records
	View details of a record.
	Send an email or RFMS mail message regarding the highlighted record.

	View the history of a record.
	View the pdf history of reports for the highlighted record.
	Click to view the tracking record created for every record insert made into Orders, Quotes and Bid Pro Estimates. If gray, no records are present.
	Brings up the Client Management remote actions screen and allows adding a CMM action or relate a CMM record to this record. Yellow indicates that CMM information is associated with the highlighted record
	With all date fields in RFMS, hit the D key to fill in today's date, type in a date, use the up and down arrows to move the date one day at a time or click F8 to bring up the calendar and then choose the date.
Windows Menu	The bottom part of the screen lists all windows open in the current module. The one currently being viewed is checked. To view a different window, click it with the mouse.
	Disabled Field. If set in <i>>Utilities>System Options>System Wide>General >(Set Up Global Interface System Options or Override Global Interface System Options)</i>
	Required Field. If set in <i>>Utilities>System Options>System Wide>General >(Set Up Global Interface System Options or Override Global Interface System Options)</i>

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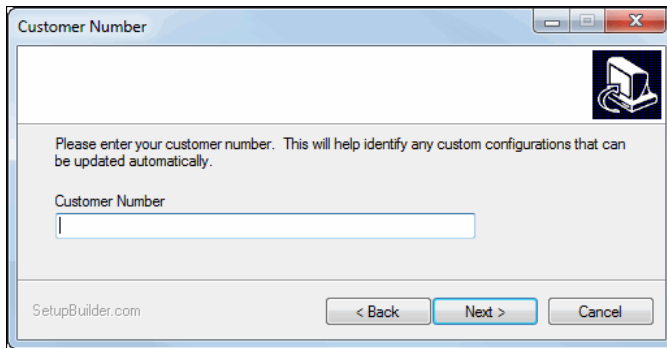
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System Wide

Loading the update

Loading the update requires entering your customer number. This is the same customer number which allowed the update to be downloaded from the RFMS web page.



The customer number allows the system to find any custom configurations for your company.

Parameters now System Options



[Watch Video](#)

The parameters from the various sections of RFMS have been centralized into system options. These system options will be available from the utilities menu of any module. *X (Module)>Utilities>System Options*. Some things which were in parameters have been moved to Set Up Screens.

This change brings with it some major benefits.

1. Now all the system options will be available from one central location, searching around to find a particular setting will no longer be needed.
2. This centralization will allow administrators to setup users from one workstation rather than having to go around to various computers to change settings.
3. An additional type of parameter has been added. This will allow administrators the control they want, with very simple options for users. Administrators can decide which type an option will be.
 - a. Global- applies company wide- only the administrator can set these. (Similar to Public)
 - b. Assigned- these will apply to a particular user, but only the administrator can set these. (Similar to the way most users had private set)
 - c. User- these will be user specific, but the user will have access to set these for their self. (This will allow things like font size which don't affect business to be set by individual users.)
4. The ability to search for an option has been added. For example, to find the option for Order Entry Starting Position. All the filter selections can be tagged, just type "start" in the search field and hit tab. The options with start in the name will be listed.

EXIT Edit Values For Users Change Hidden Setting Change Type

Filters

Select Types: Global, Assigned, User

Select Modules: Client Management, E-Commerce, Order Entry, Sales Floor Assistant, Schedule Pro, System Wide

Select Applies To: Buying Groups, Order Entry, Schedule Pro

Search Option Field for Text: start

Hidden	Type	Module	Applies To	Category	Option	Value
	Assigned	Order Entry	Order Entry	Interface	Order Entry Starting Position
	Assigned	Order Entry	Order Entry	Interface	Starting Screen



Notes:

When searching:

- Options which formerly used the word show, the will now use the word display.
- Use only the key word to search by, for example to find the option Integrate Provider’s earnings, just enter provider.

Conversion

All settings should remain the same as they were before the update, only the interface has changed.

Access to system options will be set to level one.

In the past there were some settings which could be set as a public parameter and also a private parameter for those needing something different than the rest of the company. An example of this, is default Sales Representative. This is now a single option which an administrator can set for all users, and then assign a different value to certain users.

[For Complete Details, Click Here](#)

New Options in this Update

>Utilities>System Options>Order Entry>Order Entry> **Enable Overhead Margin Percent by Order Line**
[Click here for details](#)

>Utilities>System Options>Order Entry>Credit Settings> **Default Credit Limit for New Customers**
[Click here for details.](#)

>Utilities>System Options>Order Entry>Products>Use Price Level> **New Choice Tiered Referrals**
[Click here for details.](#)

Posting Payments

When entering payments, if Reference Number appears to be a credit card number, the system will validate the number. If the number is not a valid credit card number, the user can elect to retry or ignore the message.

This applies in the Customer Order, Multiple Payment and Hyper Pay modules.

Attachment Directory

Previously, the RFMS Attachment function would only allow you to save to a directory on a local or mapped drive. In version 12, the system allows you to select a UNC path (Windows network path) such as [\\FILESERVER\AttachmentFolder](#) for attachments. This lets you save to a network path without creating a mapped drive. Please consult with your local IT Professional for more information on using UNC paths.

Audit Triggers

A new column (RowVer) was added to the Audit Table and it is also the primary key. This caused all of the RFMS created audit triggers to have to be rebuilt. The update will rebuild the triggers (no data is lost). The few clients who may have manually written triggers (not using Enterprise Manager) to add data to the audit table will have to make sure those triggers still work with the now table schema. The update ATTEMPTS to detect this situation and stop the update BUT it can be fooled.

Order Entry

Discounts in Customer Payments

The discount can now only be coded to the standard account codes for Discounts (As of version 12.0) or Finance Charges. (As of 12.0.8422 1st revision release)

Manually reversing an AR deduction is no longer required as voiding a payroll check automatically does the reversals. (As of 12.0.8422 1st revision release)

If clients are using a customer order to transfer materials between stores,(or any other non standard procedure) they will need to code the discounts to the discount account code and do journal entries for other coding that might be needed.

Overhead Margin Percent by Order Line

This option has been added to allow overhead percent to be calculated on a line by line basis on a customer order, in addition to the option of calculating it on the order total. This was already an option in Bid Pro. The option will default to No, so that there will be no change in the calculation method, unless desired. The lines cannot be in a delivered status.

The screenshot shows a dialog box titled "Adding Customer Order Line - Invoice CG201411". It contains several input fields and buttons. The "Overhead Margin" field is circled in red and shows "0.00%". Other fields include "Line Number" (0001), "Product Code" (01 CARPET), "Bill Number", "Style", "Quantity" (0.00), "Billing Quantity", "Price" (0.00), "Total" (0.00), "Status" (Cut), "Group" (1 CARPET), and "Commission" (0.00%). There are also buttons for "Notes", "Available", "Reference Line", "OK", and "Cancel".

>Utilities>System Options>Order Entry>Order Entry

Enable Overhead Margin Percent by Order Line

Type- Can be Global, Assigned or User

With this option set to No, overhead margin will be reported on the order total. The overhead margin box will be hidden on the order line. When set to Yes, the overhead margin will be reported on a per line basis. The overhead margin box will be available on the order line.

The calculation will be on a line bases with both methods.

- If not using Percent by Line, then each line will carry the same percentage as stored in the Order Header.
- If using Percent by Line, the default value will be the value from the Header, but the percent on each line can be adjusted.
- The per unit overhead column in the line browses are calculated using the overhead margin percent on each line.

Providers-Browse

Order Entry>File>Providers or Order Entry>File>Customer Orders>Find order>Provider Button



The HR check number has been added to this browse list.

Worker #	Certified	Provider	Invoice	Product Code	Service	Service #	Total Units	Earnings	Special Period	Pay Status	Ordered	Delivered	Installed	Date Paid	HR Paid	HR Check	Pay Type
247		EVANS, TONY	CG201328	85 - VINYL REMOVAL	TAKEUP-VINYL/NDON A TU/NA		500.00	145.00					01/31/12	07/23/12	07/23/12	10114	Salaried+Commiss
247		EVANS, TONY	CG201328	89 - VINYL INSTALLATION	VINYL POINTS/EMP/VN/BAR		500.00	210.00					01/31/12	07/23/12	07/23/12	10114	Related+Commissi

Reports

Order Entry>Reports>Certified Payroll

The **Certified Payroll Report** now has options for printing the tax ID. Click the down arrow at the Print Tax Id Field to select between: not printing the ID at all, printing it in full or printing it with only the last 4 digits shown.

Certified Payroll Report

Week Ending: 07/23/12 F8 Monday

HR Pay Date: 07/23/12 F8 Monday

Print Tax ID: Print Mask [ex: XXXXX-6789]

Group By: JOB # PRMP Invoice Number

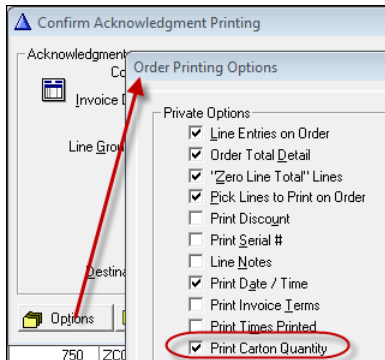
Preview (Legal-Sized Paper)

Print Cancel

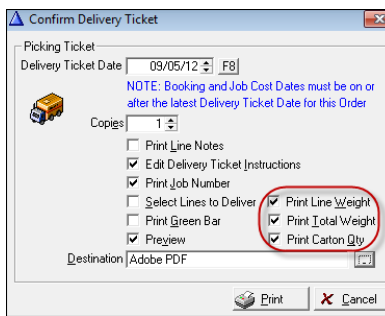
Figure: Certified Payroll Report Options

Acknowledgement/Delivery Ticket

The carton quantity based on sell in quantity is now an option for printing on Acknowledgements and Delivery tickets. Delivery tickets can also print the line weight and total weight.



Sold To		Ship To			
TEST CARTON ABER... 58001					
Order Date	Tele #1	PO Number	Order Number		
09/13/12			CG200009		
Inventory	Style/Item	Color/Description	Quantity/Units	Price	Extension
S020	1.7512B1	WALNUT PENCIL LINER	4.00 PC	12.81	51.24
Carton Qty: 2.00					



Code	Roll/Item No.	Width	Amount	Units	Location	Store	Sign
*Line # 0001	EMERALD 7/16/.		2,000.00	SF		100	
29	1068178						
Unit Ship Weight: 2.00 oz						Carton Qty: 0.50	
Line Total Ship Weight: 250.00 lb							
Run Lot:: KIMBERLY							
Total Shipping Weight: 250.00 lb							

Default Credit Limit for New Customers

A new option has been added to automatically give a credit limit to all new customers added.

>Utilities>System Options>Order Entry>Credit Settings>Default Credit Limit for New Customers

All new customers will start with a credit limit or the amount set in this option.

Global	Order Entry	Credit Settings	Default Values	Default Credit Limit for New Customers	250
--------	-------------	-----------------	----------------	----------------------------------------	-----

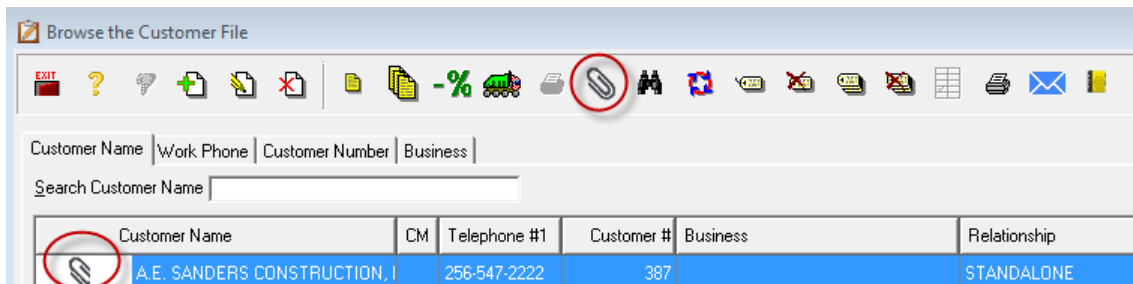
Claims

Client Management Remote actions is now accessible via the claims module.

Customers

Order Entry>File>Customers

Files can now be attached to a customer record. Highlight the customer, click the attachment button. Browse to find the file to attach. Customers with a file attached will have the attachment icon displayed in the browse list.



Referral Fees

With this update, referral fees can be based on a sliding scale depending on the amount paid for a product. The referral fee is the difference between the total using base price and the total with the chosen price. This method is called **Tiered Referrals**.

Notes

With Tiered Referrals, fees are paid to the sold to customer.

Inventory sold must be associated with a product record having pricing formulas set. If an unreferenced line is entered the referral amount will be zero.

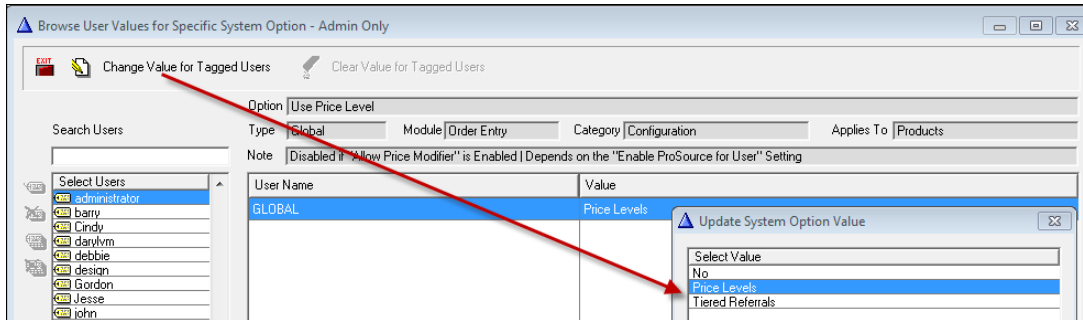
Steps

1. Turn this method on in System Options

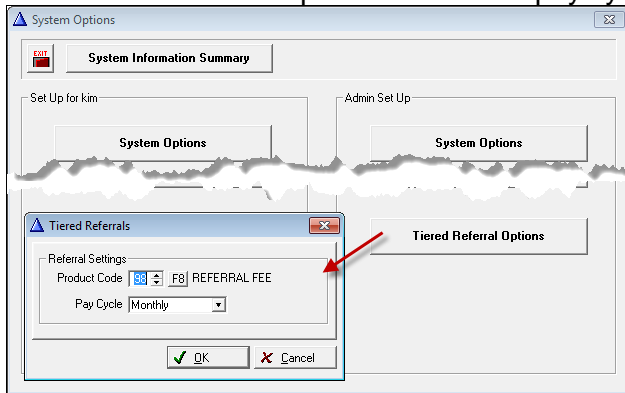
>Utilities>*System Options*>*Order Entry*>*Products*>*Use Price Level*

A new option **Tiered Referrals** is now available.

This is not available with Allow Price Modifier turned on. Also no other referral method can be active.



2. Set the referral product code and pay cycle from the main System Options Screen.



3. Set Price Level Prompts

Tiered Referrals will work for up to 13 price levels for rolls (1-6 using cut cost and 7-12 using roll cost) and 7 levels for items with Level 1 being the base level.

Selling a product for Level one BC would result in no referral fee.

The levels can be named whatever is desired but Tiered Referrals will refer to the levels as BC through BC6 and BC_R1-6.

4. Set Product Price Level Formulas. This can be done on a product by product basis or use the range edit feature.

For Example:

Items and Rolls Cut Cost

BC= Level One Formula $(C + F) * 1.25$. This will be Price 1 or P1.

This price can be used to calculate the next 5 prices.

BC1=Level Two Formula $P1*1.05$

BC2=Level Three Formula $P1*1.10$

BC3=Level Four Formula $P1*1.15$

BC4 = Level Five Formula $P1*1.20$

BC5 = Level Six Formula $P1*1.25$

Rolls Roll Cost

BC_R= Level Seven Formula $(R + F) * 1.25$. This will be Price 7 or P7.

This price can be used to calculate the next 5 prices.

BC1=Level Eight Formula $P7*1.05$

BC2=Level Nine Formula $P7*1.10$

BC3=Level Ten Formula $P7*1.15$

BC4 = Level Eleven Formula $P7*1.20$

BC5 = Level Twelve Formula $P7*1.25$

Once an order line has a BC level with a roll cost, it is assumed that the price will be based on roll cost. For example, a Roll good is assigned BC5R and the user resets with Default BC3? The program will see that the Line is using Roll cost, so its Tiered Referral will change to BC3R and it will be refigured


5. Enter the customer order or quote. A default level can be set for the entire order.

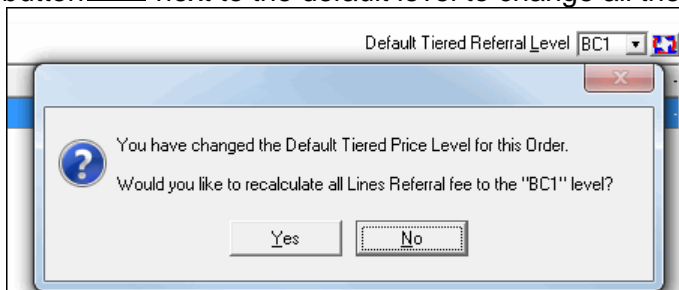


The screenshot shows a software interface with a search bar labeled "Search Line Number" containing the value "0000". To the right, there is a dropdown menu labeled "Default Tiered Referral Level" with "BC" selected. A small icon with a red 'X' is visible next to the dropdown.

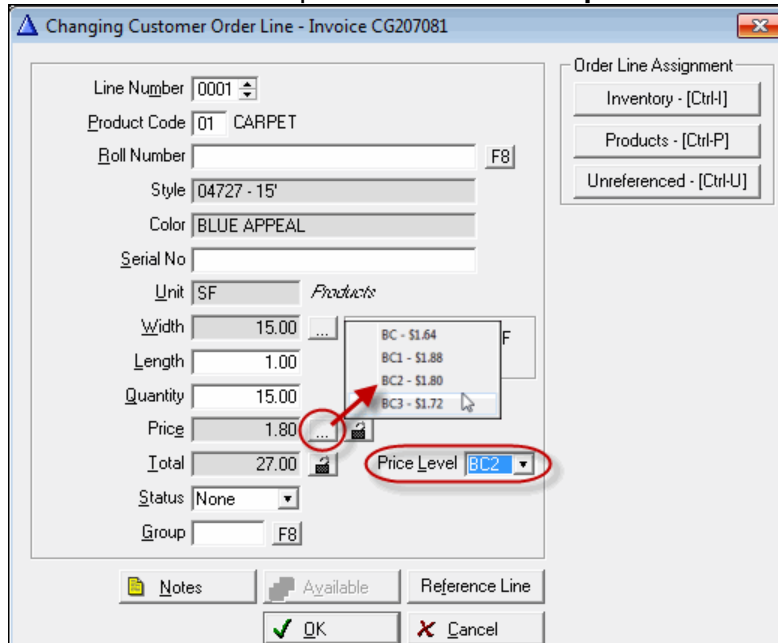
The level can be changed using the drop down arrow next to the value.

6. If lines are already entered and this number is changed, the system will give an option of changing the existing lines to the new level or leaving them at the old levels. Use the reset

button  next to the default level to change all the lines back to the default level.



7. The level can be changed on individual lines in two different ways.
 - a. Click the **ellipses** button next to the **price** field. A listing of all **price levels** with the corresponding prices will display. Choose the desired level.
 - b. Use the dropdown list next to the **price level** field and choose the desired level.



8. The total referral amount is listed in the totals section of the order.

Misc. Charges	0.00
Sales Tax	2.37
Misc. Tax	0.00
Order Total	\$30.57
Balance Due	\$30.57
Grand Total	\$30.57
Referral	\$3.60

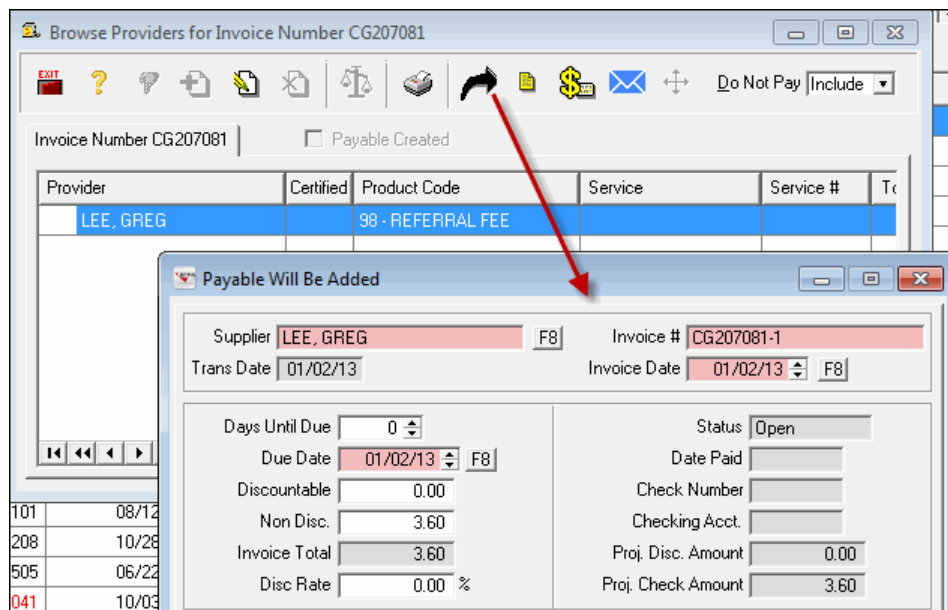
9. When entering unreferenced lines, any price can be entered and the referral amount will be calculated based on the Tier level chosen and this table.

P=Price entered.
BC – no calculation
BC1 – P – (P/1.1)
BC2 - P – (P/1.15)
BC3 - P – (P/1.2)
BC4 - P – (P/1.25)
BC5 - P – (P/1.05)
BC_R – no calculation
BC1R – P – (P/1.1)
BC2R - P – (P/1.15)
BC3R - P – (P/1.2)
BC4R - P – (P/1.25)
BC5R - P – (P/1.05)

Example1: $BC4 = \$12.50$ calculation: $\$12.50 - (12.50/1.25) = \2.50 The unreferenced referral fee contribution amount is \$2.50/unit.

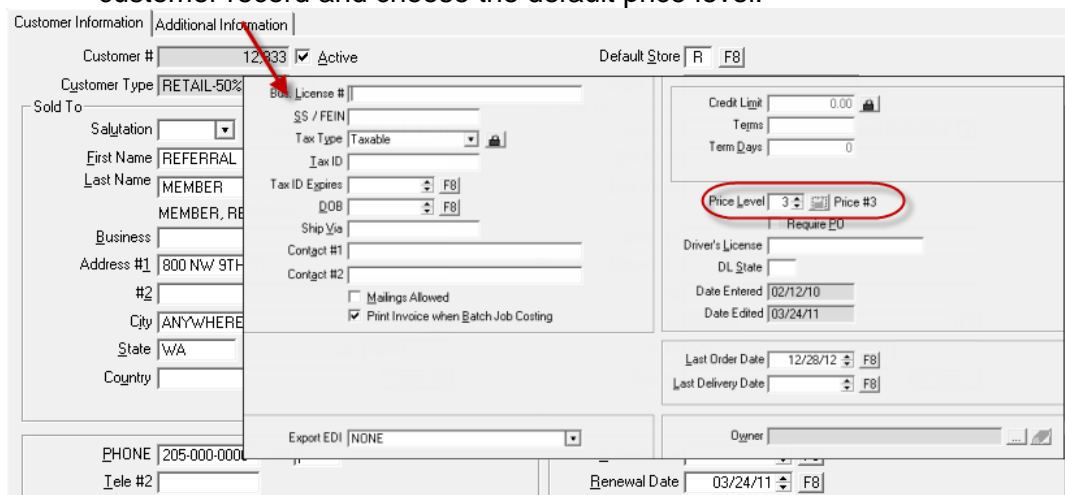
Example2: $BC1 = \$16.50$ calculation: $\$16.50 - (16.50/1.1) = \1.50 The unreferenced referral fee contribution amount is \$1.50/unit.

10. When the order is job costed a provider record for the referral fee to the Sold To customer will be created. The level cannot be changed after an order is jobcosted.



From the **Browse Providers** list on the invoice, click the arrow button to create a payable for the referral fee.

11. A default price level can also be set for a customer. Go to the additional information tab on the customer record and choose the default price level.



Inventory

Utilities

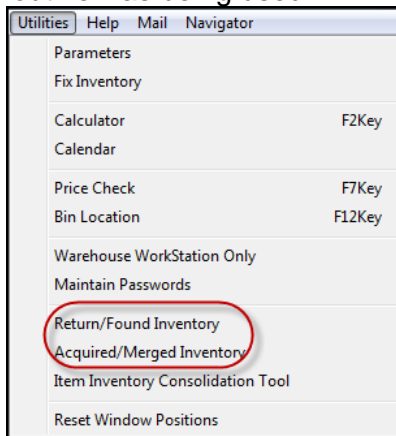
Beginning Inventory

Beginning inventory should only be inventory which is in stock to make up the beginning inventory general ledger number. This routine has been modified to be **available for use only under certain conditions.**

1. If the General Ledger has **not been installed.**
2. If the General Ledger has been **installed** with **no** general ledger records entered then the invoice can be **dated with today's date.**
3. If the General Ledger has been **installed** with **some** general ledger records entered, and **beginning balances have been entered** then the invoice will be entered as **one day before the Beginning balance transaction date.**
4. If the General Ledger has been installed with **some** general ledger records entered, and **beginning balances are not present for some reason** the beginning inventory routine will **no longer be available.**

TIP: We highly recommend that this option be password protected at the appropriate level to prevent users from accessing this option.

Two routines have been added to inventory utilities to eliminate two ways the beginning inventory routine was being used.



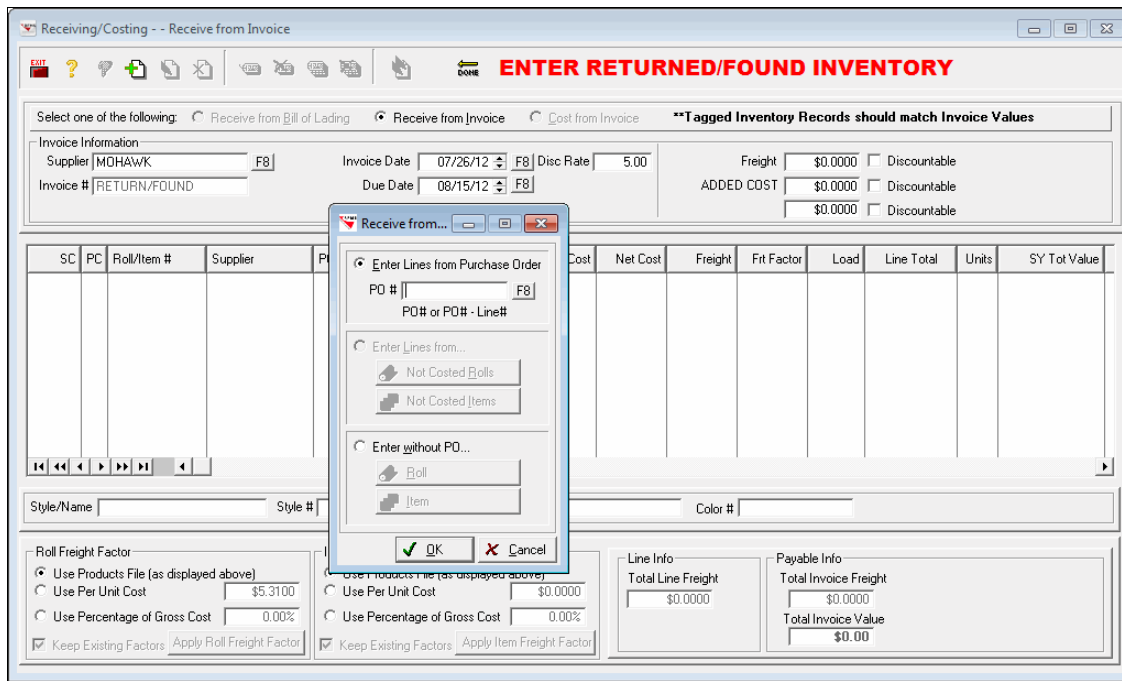
Return/Found Inventory

This routine allows inventory to be entered without posting a payable. Returns can ONLY be made into an open GL period. This routine will automatically post the correct amount into Cost of Goods Sold (credit) and Inventory (debit). This routine is recommended for inventory returned on orders that were not run through RFMS Customer orders or inventory found with an unknown origin.

The Invoice Number will be set to "RETURN/FOUND". Initially, this routine will have a Level 1 password set.

While this routine is a simple way to re-enter merchandise returned from customer orders, entering a negative line on the original customer order will return the material to inventory, adjust the balance of

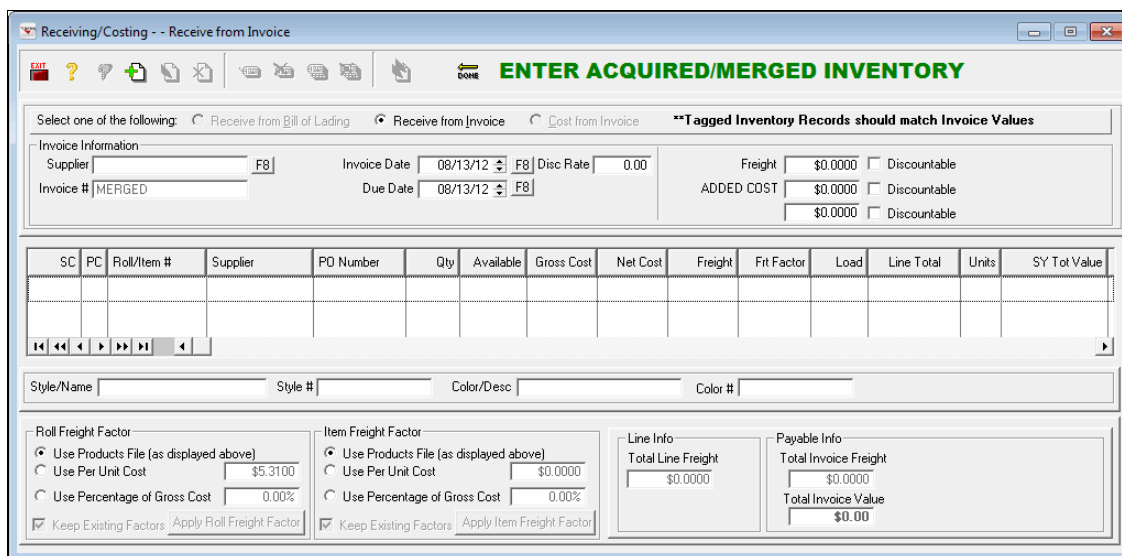
the customer order, and affect commissions and sales reporting. If the original order is job costed in a closed period, another order could be entered with the negative line. To keep the two orders together, they could be grouped into a billing group.



Acquired/Merged Inventory

This routine allows entering inventory that has been Acquired or Merged from another store. This routine will not post anything into the Journal. All Journal entries will need to be made manually. This way individual inventory records can be entered into the system while journal entries can be made for the totals. To use this routine, an unlock code each day it is used must be obtained from the help desk. The help desk will help ensure the correct journal entries are made.

The Invoice Number will be set to "MERGED".



Enhanced Item Tag

Inventory>File>Item Inventory>Tag an Item

Item inventory now has options which allow printing a more custom looking tag.

Tag an item for printing and the new Item Tag Options Screen displays. To use the new tag, check the Use Enhanced Tag box.

The screenshot shows the 'Item Tag Options' dialog box with the following settings:

- Quantity:** Number of Tags To Print: 1
- Selling Price:** Print Selling Price, Gross Margin: 40.0000%, Selling Price: \$40.37, Update Inventory Selling Price
- Rounding:** Actual, Range (Low: 0, High: 0), Exact (0, 2, 4, 6, 8, 1, 3, 5, 7, 9)
- Enhanced Tag Options:** Use Enhanced Tag (Note: Enhanced Tag features only work when printing Enhanced Inventory Tags), Selling Price Prompt: Selling Price Prompt (locked), Prompt Font: Arial 12, Price Font: Arial 14
- Promotional Price Option:** Promotional Price Option, Promotional Price Prompt: Promotional Price (locked), Promotional Price: 35.00 C, Prompt Font: Arial 14, Price Font: Arial 16
- Compare Price Option:** Compare Price Option, Compare Price Prompt: Compare Price (locked), Compare Price: 45.00 C, Prompt Font: Arial 0, Price Font: Arial 0
- Notes:** Note 1 (Note One), Note 2, Note 3, Note 4, Font: Arial 14
- Icon:** Icon, Icon Path: C:\Doc Programs\QA 12.0\sampleflooring1
- Sale Phrase:** Sale Phrase, Sale Phrase: Best Prices, Best Service (locked), Font: Arial 14

To print the Selling price, check the box on the left hand side.

In the Enhanced Tag Options:

Enter a Prompt for the Selling Price, to lock this for use on the next tag click the lock button.

The value is locked when the button is yellow. To edit the value click to unlock.

Then use the ellipses button to select the font, size and color for the selling price prompt and selling price.

To print a Promotional Price click that box. Enter a prompt and select the fonts as was done for the selling price. Either type in a promotional price or use the C button to invoke the calculator to figure a promotional price.

To print a Compare Price click that box. Enter a prompt and select the fonts as was done for the selling price. Either type in a Compare price or use the C button to invoke the calculator to figure a promotional price.

Notes

Check the boxes to print notes on the tag, enter the notes to be printed and set the font.

Icon: If preprinted tags are not used, an icon can be selected and printed on tags.

To print a Sale Phrase click that box. Enter a prompt and select the fonts as was done for the selling price.

The font selections will be saved as a basis for printing the next tags, but each tag printed can be changed if that is desired.

The enhanced options only apply to the Enhanced Item Tag or the Enhanced Item Tag Pre Printed

The image shows a configuration dialog box for printing tags. At the top, the 'Type' is set to 'Enhanced Item Tag'. Below this, there is a checked checkbox for 'Preview Item Tags'. The 'Printer' section includes a dropdown menu showing 'Adobe PDF' with an ellipsis button to its right. Below the printer selection, there are two radio button options: 'Dot Matrix (3 1/2" x 15/16", 1 Up)' and 'Laser / Ink Jet (1" x 4", 2 Up)', with the latter being selected. A 'Position 1 (Laser / Ink Jet)' button is also present. The 'Barcode' section features a barcode icon and two radio button options: 'System Ref #' (selected) and 'Prod Code + Item #'. The 'Label' section has three radio button options: 'Manufacturer' (selected), 'Supplier', and 'Private Supplier'. At the bottom, the 'Additional Options' section contains a checkbox for 'Print Date Received' which is currently unchecked.

Best Prices, Best Service

Style: BOURBON STREET

Color: APPLEWOOD



Selling Price Prompt

\$40.37

Promotional Price

\$35.00

Compare Price

\$45.00

Note One



196346

Figure Sample Enhanced Tag

Great Flooring Store

STYLE: BOURBON STREET

Color: APPLEWOOD

Size: 0 x 0

Sell In Multiples Of:

Selling Price Prompt **\$40.37 EA**

Promotional Price **\$35.00 EA**

Compare Price \$45.00 EA

Note One

Item #: #ST036080001

Run Lot:



Print Date: 11/27/2012

Figure Sample Enhanced Pre-Printed Tag

New Fields

Collection, Private Collection, Price Code, Fiber, Construction, and Country of Origin

The new fields Collection, Private Collection, Price Code, Fiber, Construction, and Country of Origin have been added to an additional Information Tab.

Store: [F8] Lading #: 771741-03 [F8]

Product Code: 14 [F8] T&A Date Rcvd: 09/15/11 [F8]

Manufacturer: T&A [F8] Invoice #: 007966

Supplier: T&A [F8] Invoice Date: 09/15/11

Private Supplier: T&A [F8] Location: T-25

PO #: #ST036330004 No Carton/Buying Qty is available.

Private Item #: APPLEWOOD REDUCERS [F8]

Priv Item Name: BOWBOW ST APPLEWOOD REDUCERS

Run Lot: Qty Rcvd: 40.00

Serial No: System Ref #: 197,373

SKU: Manf SKU:

Sidemark: STOCK

Comments: DEL

User Number: 0.00 Initial Value: \$279.60

Item: **Additional Info**

Collection: MY COLLECTION

Price Code: A

Construction: CONSTRUCTION

Fiber: STAINMASTER

Country: UNITED STATES

Figure Item inventory record

Collection and Private Collection are available on the Item Inventory Browse list by scrolling to the end of the list.

SKU	Manf SKU	Comments	Sidemark	Collection	Private Collection
		12 FEET		COLLECTION	PRIVATE COLLECTION
		ES-CC	STOCK		

Collection has been added to the Find Inventory Screen.

FIND INVENTORY

Stores: [C] [D] [R] [W] [Z]

PC: 03 REGULAR PAD, 04 BERBER PADS, 05 AREA RUG/PAD, 06 SAMPLE CHECK, 07 ARMSTRONG H, 08 BEDROSIAN

Manufacturer: _____

Supplier: _____

Style/Item: _____

Color/Desc: _____

Roll/Item Number: _____

Net Cost: 0.0000

Gross Cost To: 0.0000

Collection: _____

Clear [OK] Cancel

In order entry Collection can be seen on the browse list.

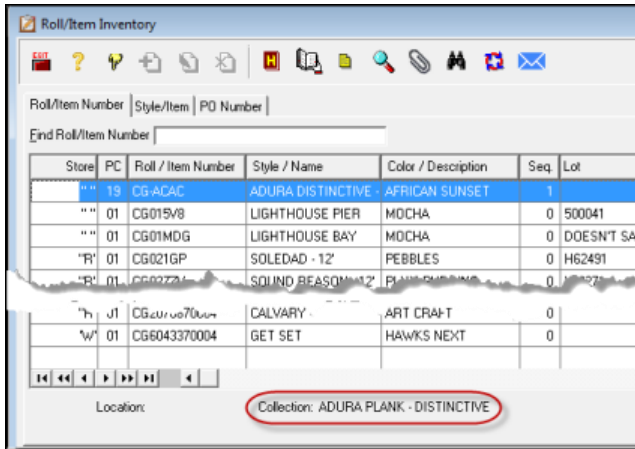


Figure Simple Inventory Browse in Order Entry

In order entry **private collection** is available as a find option in both inventory and products.

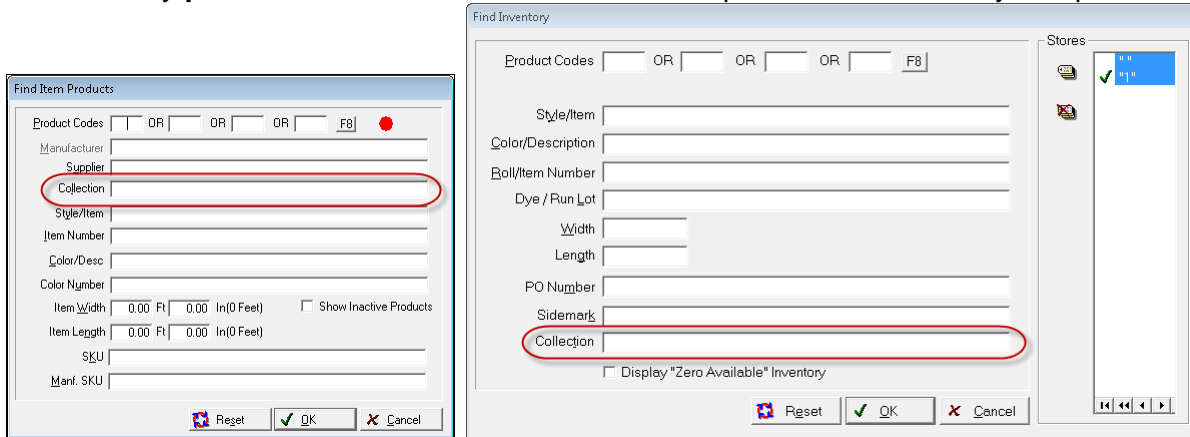


Figure: Order Entry Find Products and Inventory

The new fields Collection, Price Code, Fiber, Construction, and Country of Origin have been added to the .csv output of the :

- Item Inventory Value Report
- Item Inventory Range Report
- Item Inventory Physical Report

Reports

Materials Analysis will now report on Fiber, Country of Origin and Collection for Item Inventory. When using the country of origin only item records for the tagged countries will be included in the report. Tagging countries will not exclude roll or service records.

Frming Parameters More Parameters

Product Sets SET 1 SET 2	Ad Source INTERNET NEWSPAPER RADIO WALK IN	Contract Type CITY COMMERCIAL STATE	Order Type APARTMENT GOVT-CITY GOVT-COUNTY GOVT-STATE HEALTH CARE	Service Type SERVICE 1 SERVICE 2	Origin CHINA MEXICO UNITED STATES
---------------------------------------	---------------------------------------------------------------	-----------------------------------------------------	-----------------------------------------------------------------------------------------	-----------------------------------------------	---------------------------------------------------

Rcvd. Date From 01/01/80 F8
Rcvd. Date To 12/31/79 F8
Collection

Top Sellers now reports on Collection.

Products

Product Templates

As of version 12.0, Product Templates can be created using actual products and the template line will remain associated, or referenced to the product. Prior to this pulling the information from products just acted as a shortcut for getting information into a generic, unreferenced, line.

Item Products

Several new fields have been added for item products. These will become part of the inventory record created from these product records.

Changing an Item Product

Product Information 1 Extended Information 2 Store "" F8

User Number 0.0000
Shipping Weight 0.0000 oz F8
Thickness 0.0000 mm F8

NHMS Product

Private Collection
Price /Cost Code
Construction
Country of Origin F8
Fiber F8

Edit Product Set Membership

XW= 1

Propagate cost changes across all matching records

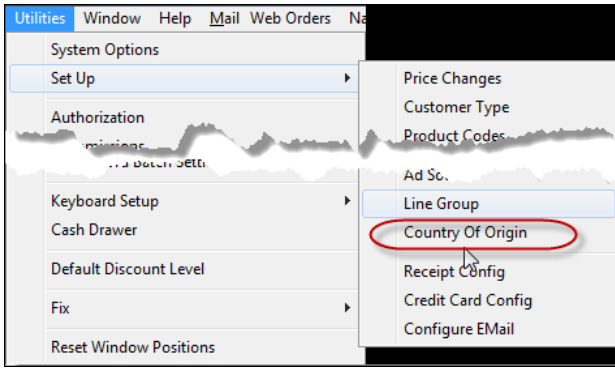
Private Collection

Price /Cost Code

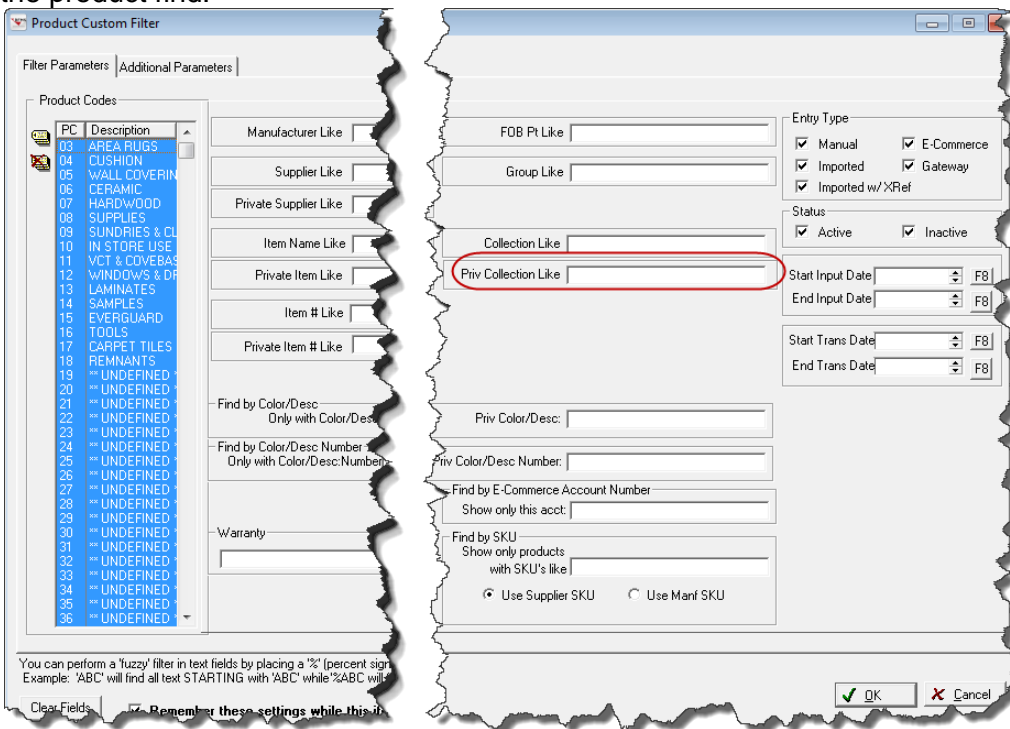
Construction

Fiber was already available for rolls.

The country of origin list is built in *Order Entry>Utilities>Set Up>Country of Origin*.



This information has been added to the Product Information Report and can be used for searching in the product find.



Accounting

Human Resources

The payroll tax tables for the tax year 2013 are included in this update.

United States

Federal: Withholding, FICA, Medicare
 California
 Colorado
 Connecticut

Georgia
 Hawaii
 Illinois
 Kentucky

Maine
 Maryland
 Minnesota
 Missouri
 Nebraska
 New York State
 Oklahoma

Oregon
 Rhode Island
 Vermont
 Yonkers

Canada

Federal: Withholding, CPP (Canada Pension Plan), EI (Employment Insurance)
 All Provinces

Accounts Receivable

Accounting>File>Accounts Receivable>View A/R

The additional information from invoice headers is now sent to the .csv file of this report.

Delivery Date	
Invoice Date	
MEASURE	09/11/12 F8
EST DEL DATE	09/14/12 F8
JOB # PRMP	ADDITIONAL
Customer Type	CASH & CARRY
Occupied	No

A	B	C	D	E	F	G	T	U	AJ	AK	AL	AM	AN
Customer Name	Telephone	Invoice	Order Dat	Del Date	Total Char	Total Cre	Color Des	Serial Nun	Credit Car	Disc Act	Del Date	1Inv 2Line 3	Addl_Info
MAIN	9055657373	CG201398	20120911		71.15	0			0			1	
MAIN		CG201398			0	0	C FLAX		0			2	
MAIN		CG201399	20120911		103.48	0			0			1	
MAIN		CG201399			0	0	C FLAX		0			2	
SIMPLE, TEST		CG201400	20120911		0	0			0			1	ADDITIONAL

Additional Option

This report also has a new option for non-erm users. Invoiced But Not Delivered.

View A/R

Report Type

- 1. Delivered Invoices With Balance
- 2. Un-Delivered Invoices
- 3. Selection 1 and 2 Combined
- 4. All Account Activity
- 5. All Delivered Invoices
- 6. Invoiced But Not Delivered

Parameters

First Name: F8

Last Name: [dropdown]

Start Date: 01/01/80 F8

End Date: 12/31/79 F8

Sub Sort

- Invoice #
- Del. Date
- Order Date

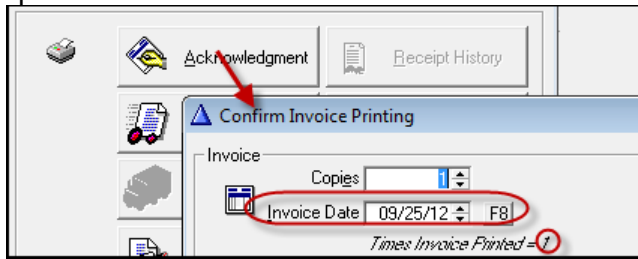
Print Options

- Print Preview
- Print Lines
- Print Receipts
- Print Addl Info
- Output CSV To: [text field]

Print Close

This option will list all customer orders which have been invoiced but not job costed.

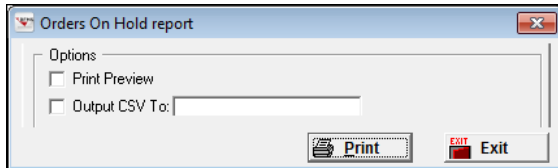
Customer orders are invoices by printing an acknowledgement and entering an invoice date on the printing options screen. Each time this is done, the number of times an invoice has been printed will be updated.



Orders on Hold

[Accounting](#)>[File](#)>[Accounts Receivable](#)>[Orders on Hold](#)

This report now has an option to be output to a .csv file and print preview is now optional rather than automatic.



Check to preview the report.

Output CSV to: allows creating an ASCII text file for use in other applications. Defaults to saving as the displayed name and to the RFMS directory, although typing in a path and name is allowed.

Accounts Payable

Suppliers

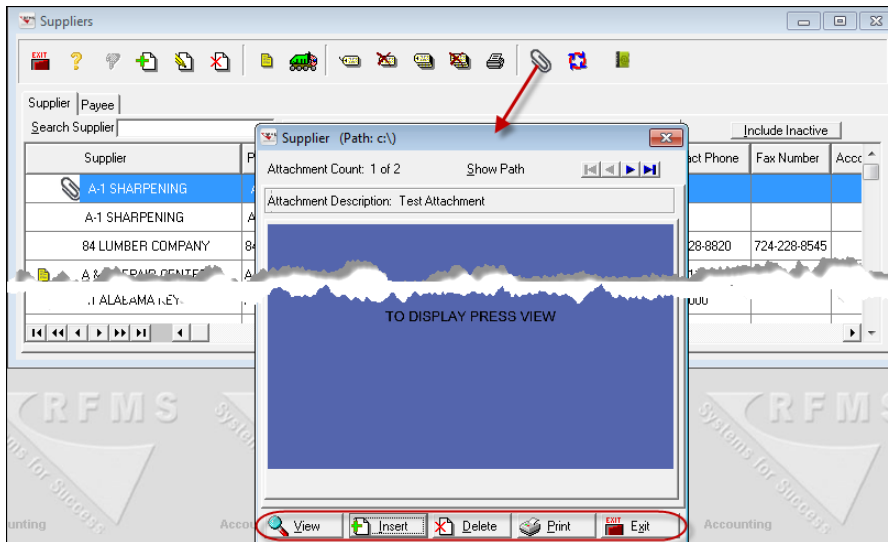
[Accounting](#)>[File](#)>[Accounts Payable](#)>[Suppliers or Order Entry](#)>[Utilities](#)>[Set Up](#)>[Suppliers or Inventory](#)>[File](#)>[Suppliers](#)

A file can now be attached to a supplier record. This could be used, for example, to attach forms to a 1099 workers record.

Highlight a supplier and click the attachment button.



From the attachment screen, files can be added, deleted, viewed or printed.

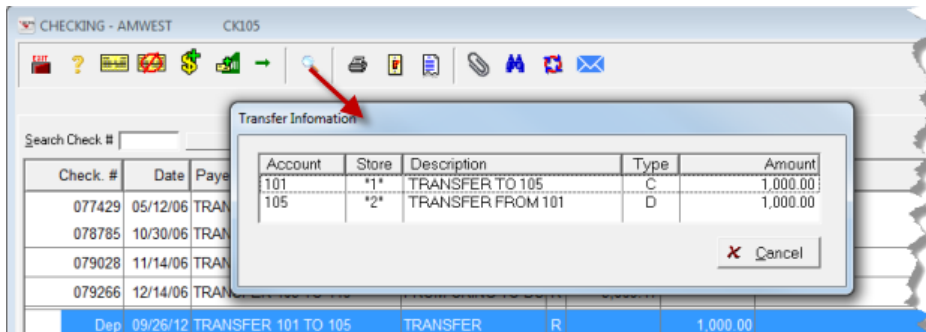


Banking

Transferring Funds

[Accounting>File>Banking>Add/Edit Checks](#)

The view button on the add/edit check browse list now works on transfers so that detail can be viewed. Data will only show for transfers created after running the version 12.0 update. All older transfer will show the detail screen but no data will be visible. This is because there is no linking data for the older transfers.

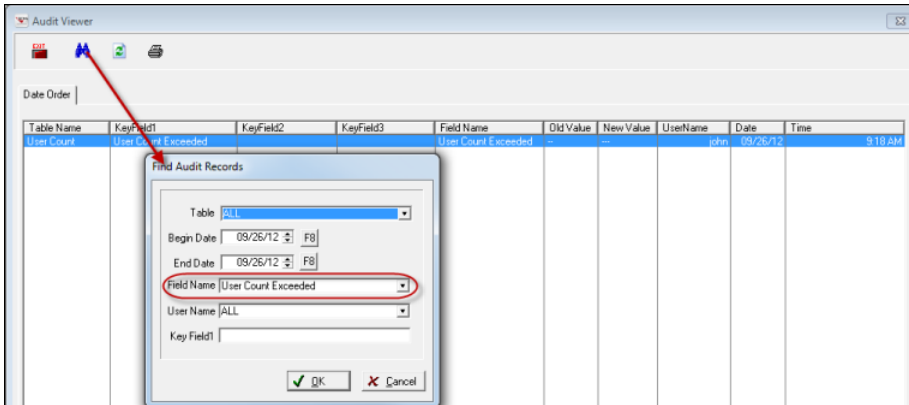


Audit Viewer

[Accounting>Utilities>Audit Viewer](#)

The system now automatically records when a user tries to get into the system and cannot because the user count has been exceeded.

To list only these occurrences, use the find feature and search by KeyField1= User Count Exceeded.



Sales Reports

Materials Analysis and Sales Information –Business Name

When selecting a customer name, searching by the business name is now an option. Click the F8 button and a new selection screen is displayed. There is now a tab for business name for sorting and searching.

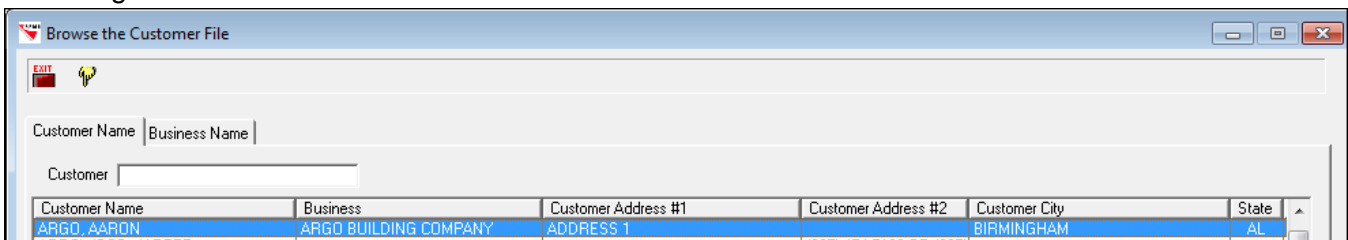


Figure Search by customer or business name.

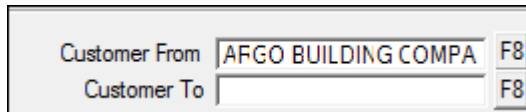
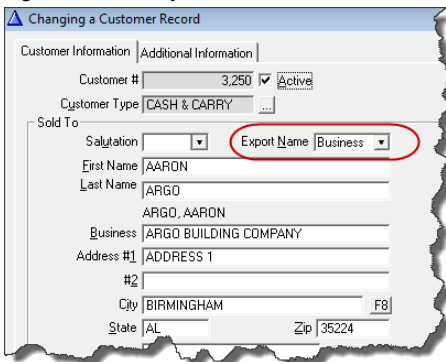


Figure Customer set to export name: business so business name is pulled in for reporting.

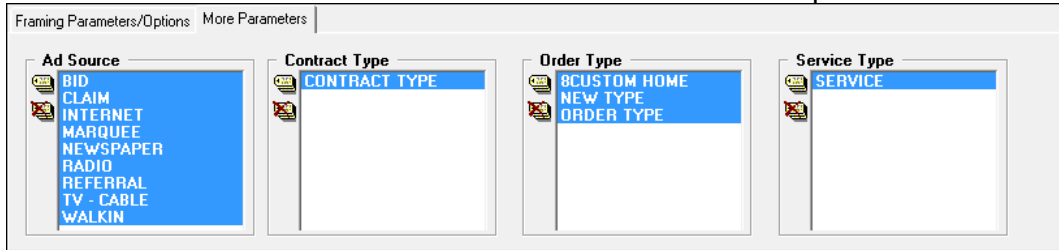
When selecting a customer for a report the customer list shows, searches by and returns Business Name if the user is set to Export Business Name on the customer record. If nothing comes into the field when selecting a customer the export business name is probably checked with no business name listed on the customer record.

Sales Information Reports and Job Cost Analysis

Sales Reports > File > Sales > Sales Information

Sales Reports > File > Profitability > Job cost Analysis

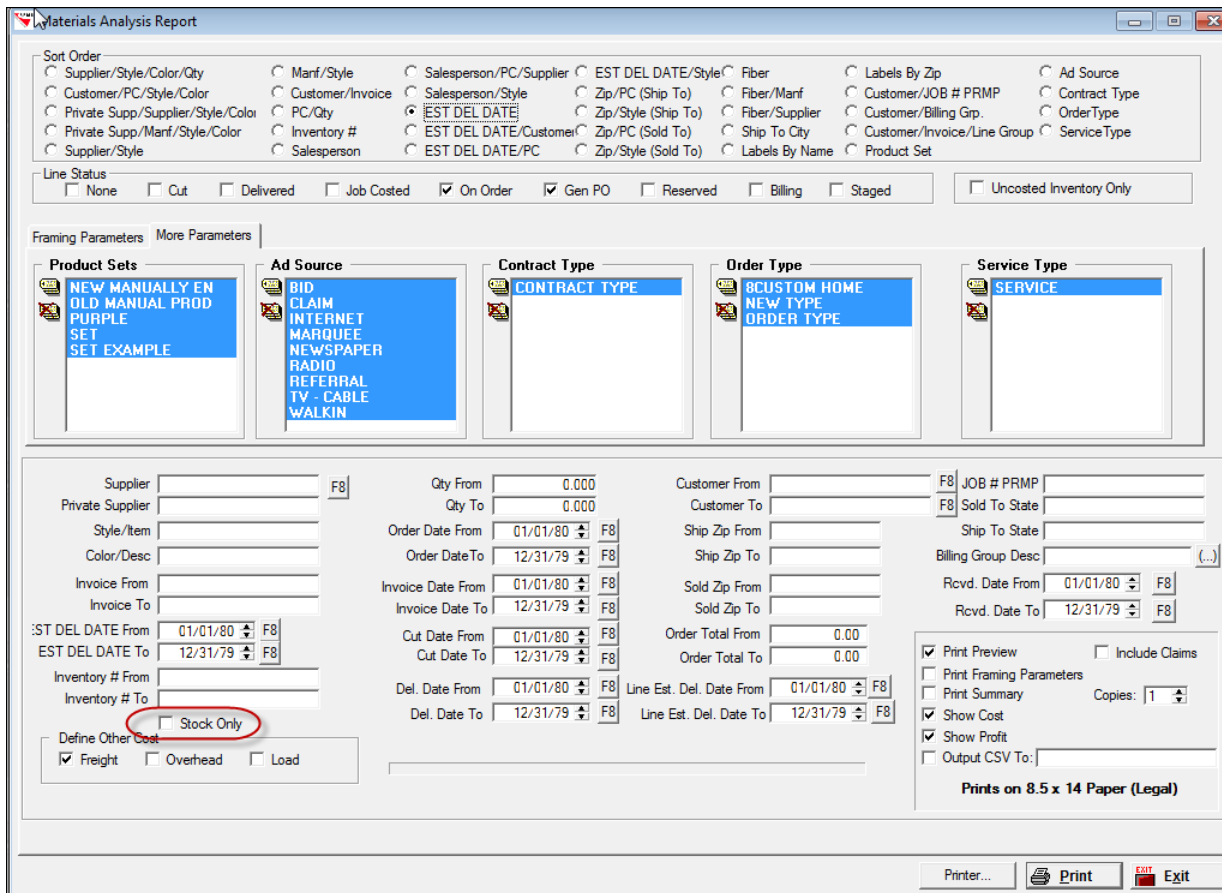
The marketing information fields have been added to these reports. Marketing information is ad source, contract type, order type and service type that are entered on the additional information tab of the quote and customer order. See the More Parameters tab on each report.



Materials Analysis-Stock

RFMS Navigator > Sales Reports > File > Materials Analysis > Orders

An option has been added to include only order lines which used inventory originating from a stock purchase order versus special order. This applies only to inventory entered since version 11.0 which was released 8/2011.



A column to indicate whether or not a line was from stocked inventory has been added to the .csv output. The number 1 indicates it was from stock, 0 indicates it was not.

	AN	AO	AP	AQ		BF	BG
1	Ad Source	Order Typ	Service Ty	Contract T	Oth.	Market AP Inv Nu	Stocked
2	REFERRAL	ORDER TY	SERVICE	CONTRAC			1
3	REFERRAL	ORDER TY	SERVICE	CONTRAC			0

Materials Analysis will now report on Fiber, Country of Origin and Collection for Item Inventory.

Framing Parameters More Parameters

Product Sets SET 1 SET 2	Ad Source INTERNET NEWSPAPER RADIO WALK IN	Contract Type CITY COMMERCIAL STATE	Order Type APARTMENT GOVT-CITY GOVT-COUNTY GOVT-STATE HEALTH CARE	Service Type SERVICE 1 SERVICE 2	Origin CHINA MEXICO UNITED STATES
---------------------------------------	---------------------------------------------------------------	-----------------------------------------------------	-----------------------------------------------------------------------------------------	-----------------------------------------------	---------------------------------------------------

Rcvd. Date From: 01/01/80 F8
 Rcvd. Date To: 12/31/79 F8
 Collection: _____

Updates to Add on Programs

[For Information on these programs, please click here.](#)

Barcoded Inventory

A history button has been added to the screen so that researching an exception is easier.

BARCODED ROLL INVENTORY

Record Count: 2 To Be Reconciled

Pr Code	Roll Num	Style	Color	SYSTEM					PHYSICAL			Status	
				Avail	Resv	Total	Width	Location	Amount	Width	Location		
01	CG45			0.000	0.000	0.000	0.00			35.170	12.00	A	Extra Roll
01	ZJ60643	ACER WIN - SOLID	12 ACRE	33.750	0.000	33.750	12.00			43.000	12.00	A	Size Error

History for Roll #: ZJ60643

Status	Invoice #	Line	Customer Name	Del Date	Trans Date	Beg Length
Reserve	CG001930	1	BEAMS, ADAM		05/06/10	43.75
Reserve	CG001930	1	BEAMS, ADAM		05/06/10	0.00
New		0	SHAW INDUSTRIES, INC		05/06/10	43.75
Costed	7375540	0	SHAW INDUSTRIES, INC		05/06/10	43.75
Job Costed	CG202168	1	12345678901234567892123456789	10/01/12	10/01/12	43.75

BidPro

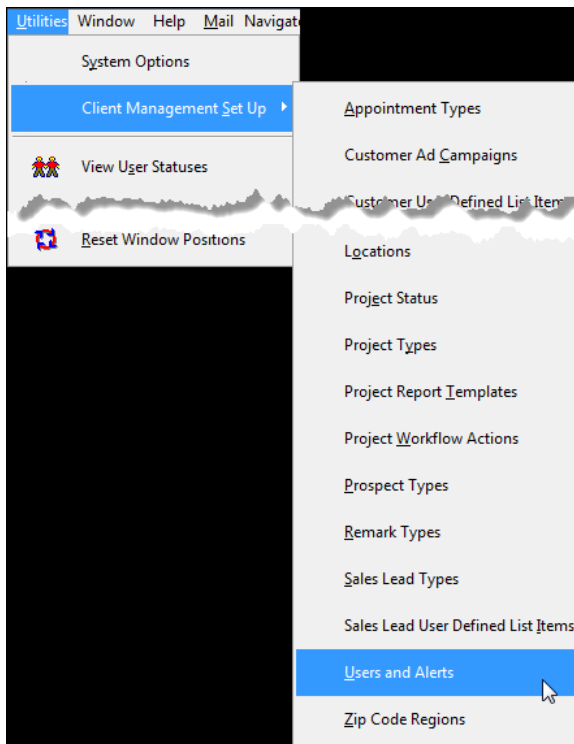
BidPro has had the ability to export an estimate to a .csv file to allow customized bid formatting since version 10.5.4. With this release multiple estimates can be **tagged** and sent to the same .csv files. Note the behavior change; previously a single estimated could just be highlighted and exported, now tagging is required.

Now the BidPro Reports (Estimates Report, Estimates Profitability Report, Exported Estimates Report, and Overage Analysis) have the option to be exported to a CSV file.

Client Management

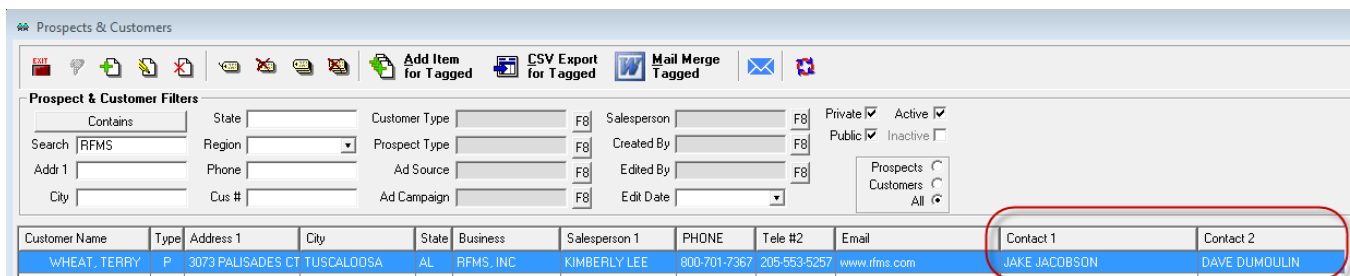
[For details on The Client Management Program click here.](#)

Some of the settings which were previously in Client Management parameters have been moved to a set up menu. These menu items will initially require a level one password.



Prospects & Customers

Contact 1 and 2 have been added to the browse list.



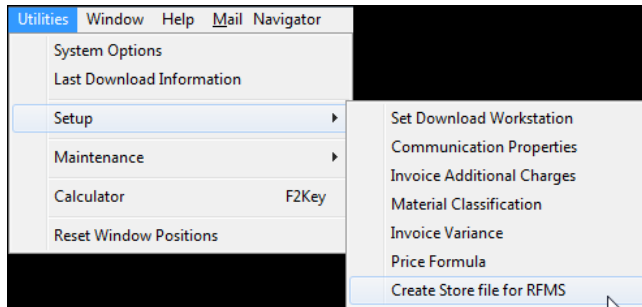
E-Commerce

[Click here for details on this module and its features.](#)

Setup

A Setup menu item has been added to the Utilities Menu. Several procedures have been moved from the Utilities menu and Parameters to this new menu level.

E-Commerce>Utilities>Setup



Maintenance

A maintenance menu item has been added to the Utilities Menu. Several procedures have been moved from the Utilities menu to this new menu level.

E-Commerce>Utilities>Maintenance

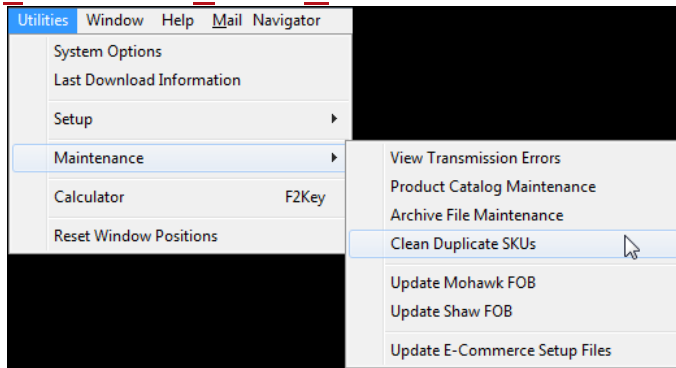


Figure EC Utilities>Maintenance

Unit of Measure

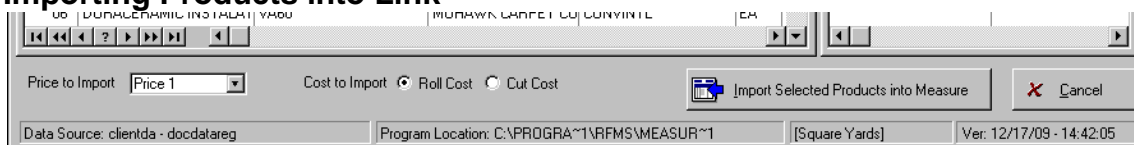
The unit of measure used in e-commerce is now pulled from the option setting *>Utilities>System Options>System Wide>Units>Square Foot Calculations*.

Claims

Client Management Remote actions is now accessible via the claims module.

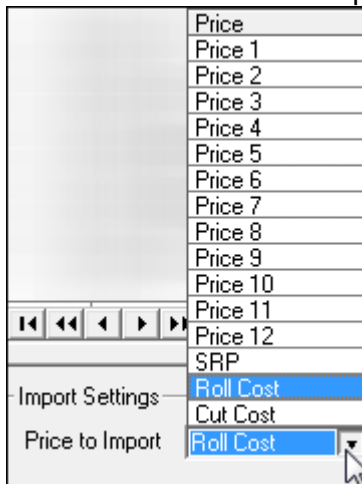
Link

Importing Products into Link



Cost to Import for roll products. These costs will not be displayed in Measure but will be stored and displayed when the information is exported into other programs.

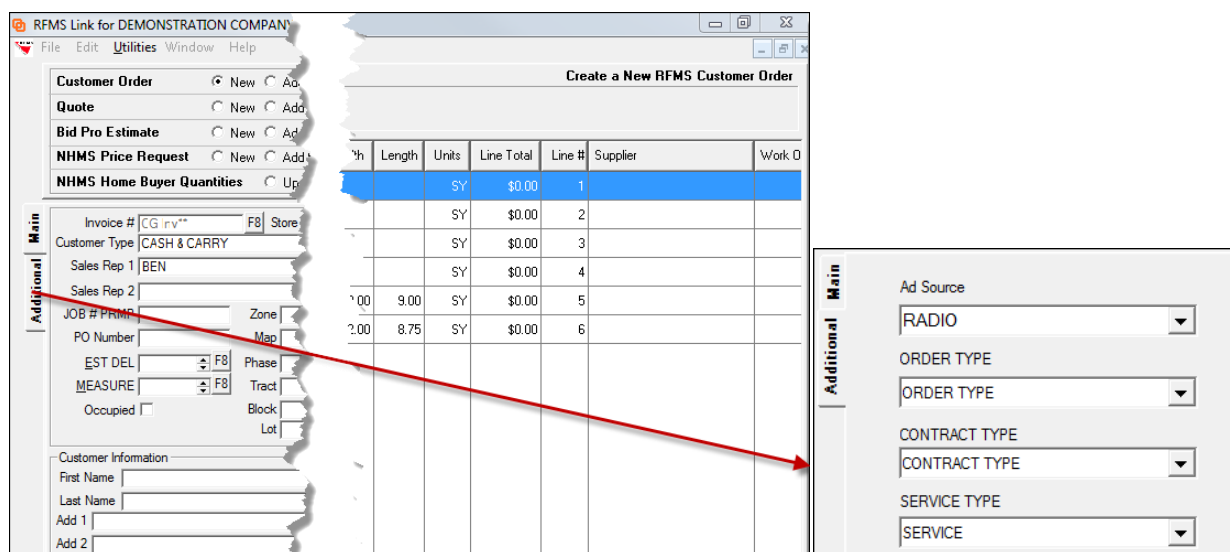
- a. For Items or services, since there is only 1 cost there is not an option button.
- b. If the user is allowed to see cost in Order Entry there is now a Roll Cost/Cut Cost for roll and Cost for items and service option added to the "Price To Use" list. This way the Cost can be sent in as a price without having to use one of the 12 prices for cost.



Exporting to an RFMS Quote or Order

This now allows adding the marketing fields, **Ad Source**, **Order Type**, **Contract Type**, and **Service Type**. If these fields are required by Order Entry, Link will also require them. To add the information, click the **Additional** tab on the left side of the screen.

Requiring Sold to Zip, Email, and Estimated Delivery Date in Order Entry now also requires them in Link. Requiring Measure Date does not apply to exporting to quotes.



Property Management

Contract Pricing

[For more details on the Contract pricing Module, click here.](#)

Property Connect

[Click here for details on this program.](#)

Search Orders

A delivery date column has been added to the Search Orders list.

Click any of the column headings in the list to sort by that column. This also sets the search field to search by that column. For example, click on order date. The listed orders will be sorted by order date. Then enter 8 to limit the list to only orders in August.

Show 10 entries Search:

Type	Invoice #	PO Number	Property	Model	Bldg/Unit	Order Date	Delivery Date
Unbilled	CG201409		MAIN	ZERO	1/1	7/30/2012	
Billed	CG201407		MAIN	FIRST		8/1/2012	8/1/2012
Unbilled	CG201410		MAIN	ZERO	11731	8/2/2012	
Unbilled	CG201411		MAIN	ZERO	11731-2	8/6/2012	

Show 10 entries Search: 8

Type	Invoice #	PO Number	Property	Model	Bldg/Unit	Order Date	Delivery Date
Billed	CG201407		MAIN	FIRST		8/1/2012	8/1/2012
Unbilled	CG201410		MAIN	ZERO	11731	8/2/2012	
Unbilled	CG201411		MAIN	ZERO	11731-2	8/6/2012	

View Billed Order

The order details have been added to the view billed order screen.

Order# CG201407

Order# CG201407

Customer MAIN 123 AKRON, OH	Ship To MAIN 123 AKRON, OH
--------------------------------------	-------------------------------------

Model: FIRST Invoice Print Date 8/1/2012
Bldg/Unit# Estimated Delivery Date
PO# Delivery Date 8/1/2012

Style / Item	Color / Desc	Quantity	Total
AAA	EGGSHELL	33.3333	8,250.00
CPT-(APT)-GLUEDOWN		300	483.00

Tax	5.00
Total	8,738.00
Paid	(4,000.00)
Balance	4,738.00

Figure: View Billed Order

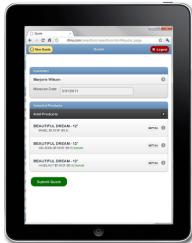
Administrative Settings

Domain User	Administrator
Order Type	Order
User Order Type	WEB
Show Preferred Time	<input type="checkbox"/>
Use Email	<input checked="" type="checkbox"/>
Email Host	smtp.gmail.com
Email Port	25
Use SSL	<input type="checkbox"/>
Email Username	
Email Password	
Email From Address	
CC Address	klee@rfms.com
Hide Line Totals	<input checked="" type="checkbox"/>
Save	

A setting has been added to hide the line totals.

SalesPro Mobile

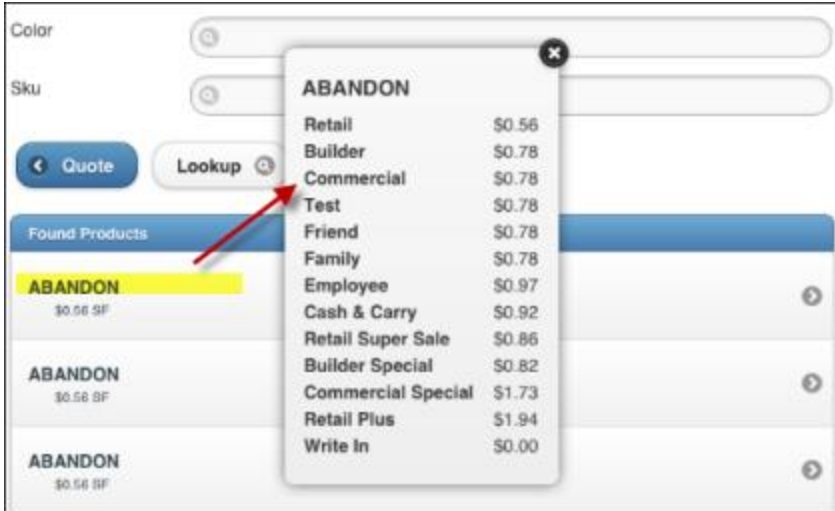
[Click here for details on this program and its features.](#)



When searching for products, available inventory will be listed in black. Non available products will be listed in red with the notation Not Available.

Found Products	
1000	Not Available
1000	Not Available
1000	Not Available
1000	\$9.09 SF

Product prices can now be viewed before pulling the material into the quote. Swipe the product name and a pop up box will display the prices of the product.



Schedule Pro

[Click here for details on this program and its features.](#)

Daily Schedule Grid

Schedule Pro > File > Daily Schedule Grid

This grid shows scheduled jobs for one day at a time. If multiple jobs are scheduled for the same time, the words multiple jobs will show on the display. Clicking the block will pop up a listing of the jobs. The multiple Jobs type must be checked for these to show.

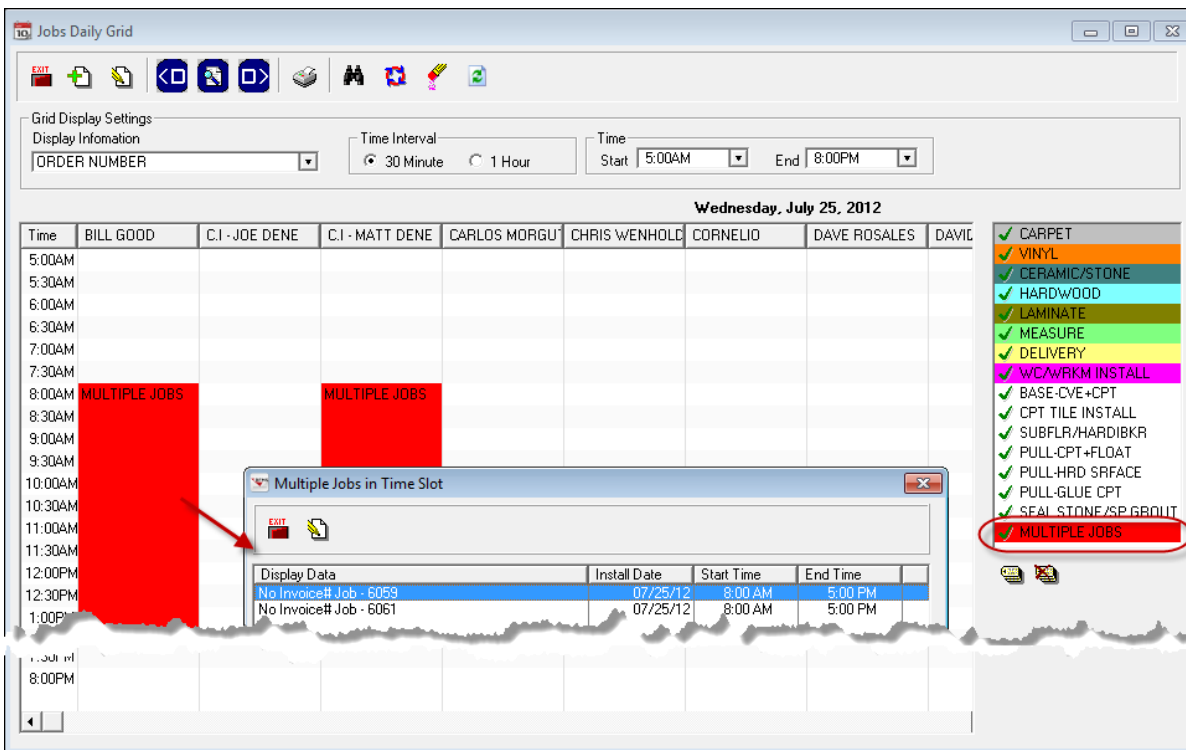



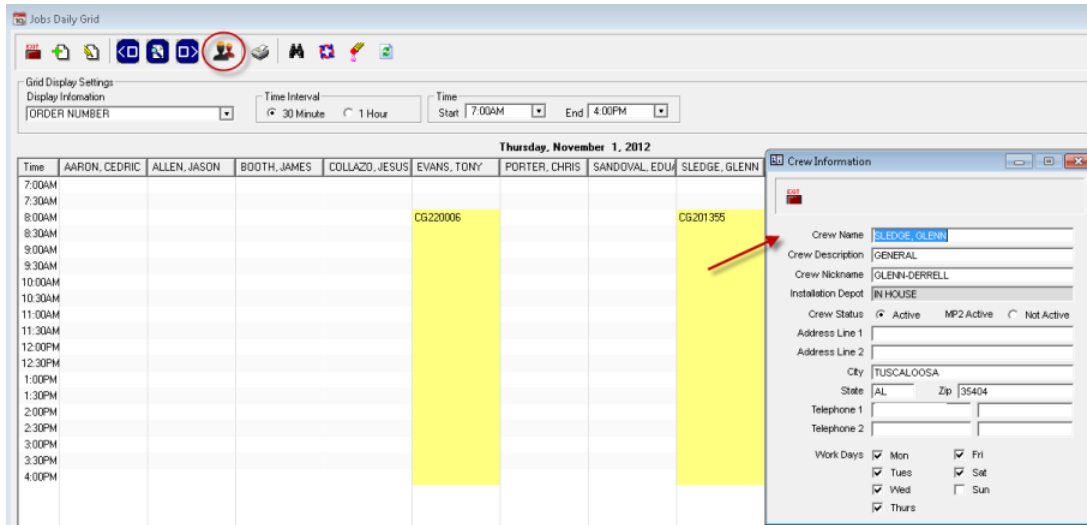
Figure: Jobs Daily Grid

Because the daily grid is designed to be sorted by job (material) type if more than one type is scheduled for the same job, then that job will show as multiple jobs. The job type is displayed in the pop up window.

Crew Information

A button has been added to show the Crew Information on the Daily Grid.

Click on a job to select it, click on the Show Crew Information Button.  The Crew Information screen for the crew on the selected job will pop up.



Reports

All schedule pro reports no longer have to be accessed from the same screen. There are now menu selections for the report areas.

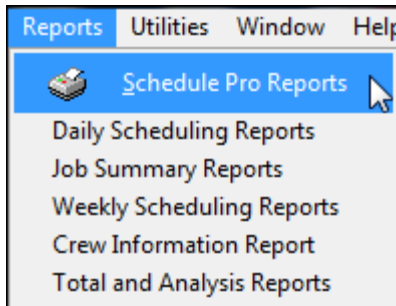


Figure: Schedule Pro Reports Menu

Job Time Slots

Utilities>Set Up>Job Time Slots

For use with the Daily Schedule Grid, the time slots are now **required to have a start and end time**. Existing slots without these can be used but at the time a time slot is added or edited the times must be added to all time slots. If times are not currently used, it is best to make a plan for the change and edit them before an on the fly edit is needed.

12.0.0.8422 Maintenance Release 1/24/13

[To see all changes click here.](#)

Order Entry

If the system option for Combine Miscellaneous Costs in order entry is set to yes, the cost will now be combined in the Inventory and Product browses from Order Entry>File as well as from the lines. Item numbers were being removed from quote lines which were pulled from inventory. This has been fixed.

The orders to view selection was no longer sticky, this has been fixed.

If you go to file/customer when set as a ProSource Workstation the customer browse screen did not expand to full screen. This has been fixed.

The option to Lock Order Sold to in version 12.0 was not allowing editing of the sold to if the job had been job costed, this has been fixed in version 12.0.1.

Assigned	Order Entry	Order Entry	Authorization	Lock Order Sold To	No Automatic Lock
Global	Order Entry	Order Entry	Authorization	Lock Sale Representative if from Customer	<div style="border: 1px solid black; padding: 5px;"> <p>Update System Option Value</p> <p>Select Value</p> <p>No Automatic Lock</p> <p>Lock After Initial Save</p> <p>Lock After Every Save</p> </div>
Global	Order Entry	Order Entry	Authorization	Lock Sales Representative after Initial Save	
Global	Order Entry	Order Entry	Authorization	Lock Tax Status after Initial Save	
Global	Order Entry	Order Entry	Authorization	Lock Tax Status if from Customer	
Global	Order Entry	Order Entry	Authorization	Lock Tax Status if from Customer	

Line Total Adjustments

When changing a line in a customer order, the system was set not to recalculate if the new unit price rounded equaled the old unit price. So for example Add 12 x 270 line of carpet, 360sy @ 1.11, line total shows \$399.60. Edit the quantity field to 361sy and the line total remained the same \$399.60, because $400.71/361 = 1.1099$ which rounds to the same unit price of 1.11. This same logic also applied when entering a line and the line total was manually entered rather than entering a quantity and a unit price and allowing it to calculate the line total. If an amount was entered that still rounded to the same unit price the system would allow that total.

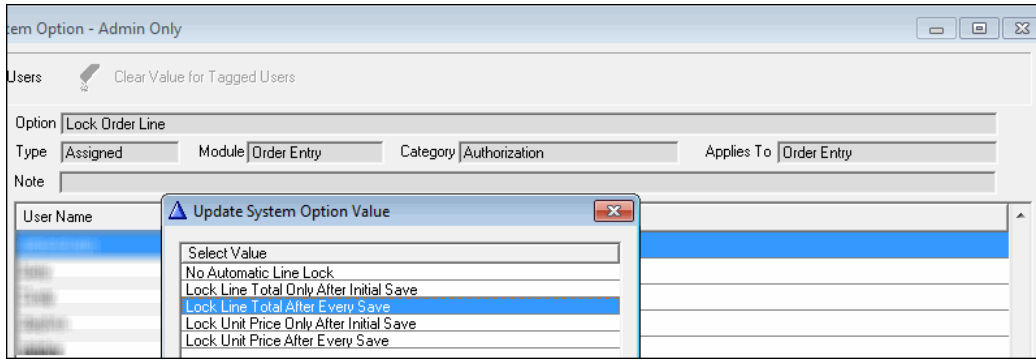
The rounding was unsatisfactory for some clients, so the system was changed to always calculate the line total.

To allow entering a line total rather than allow the system to calculate it on the edit price screen, in version 12.0.0.8362 the method was to type in the desired total and click the lock button. As this added a step this was unsatisfactory to many clients.

In version 12.0.1, this behavior changed so that if an edit is made to the Unit price or the line total in the override price screen, that total and the new unit price are automatically locked.

Note: The system Option to Lock the Order Line total refers to changes made after the order line is saved, not the process of entering a line.

Now those who want the system to recalculate to the actual total when a change is made in quantity only need to set the system option to No automatic line lock, or unlock the unit price or line total to make a change and the numbers will recalculate.



Accounting

- With the system set to Line Tax, the use tax was not reporting. This has been fixed.
- If an order was unjobcosted, the use tax was not being subtracted. This has been fixed.
- Posting Finance Changes, the tag all button did not work. This has been fixed.
- State Tax Tables have been added for Kansas and New Mexico

Client Management

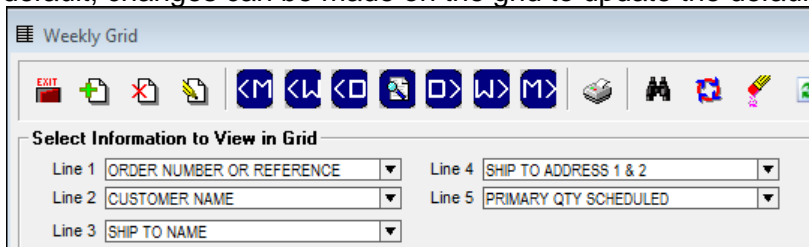
The ability to password protect Each of the View buttons separately on Browse order history separately has been added in version 12.0.01.

Schedule Pro

Grid Line default system options will now save.

Type	Module	Applies To	Category	Option	Value
User	Schedule Pro	Scheduling Grid	Default Filters	Scheduling Grid Line 1	ORDER NUMBER OR REFERENCE
User	Schedule Pro	Scheduling Grid	Default Filters	Scheduling Grid Line 2	CUSTOMER NAME
User	Schedule Pro	Scheduling Grid	Default Filters	Scheduling Grid Line 3	SHIP TO NAME
User	Schedule Pro	Scheduling Grid	Default Filters	Scheduling Grid Line 4	SHIP TO ADDRESS 1 2
User	Schedule Pro	Scheduling Grid	Default Filters	Scheduling Grid Line 5	PRIMARY QTY SCHEDULED

If these options are set to the type User, the user will not have to go to system options to change their default, changes can be made on the grid to update the default setting.



Quick Edit

After creating provider records from the quick edit screen, in version 12, the tags were being removed. This has been changed back to the way it was previous. The tags remain so that the status can then be changed on the same group of jobs.

System Wide

The ability to add different password levels to user and admin setting has been fixed.

12.0.1 Maintenance Release 2/13/13

Customer Orders

Provider Earnings History Report

An option to sort this report by Sold To Name has been added.

The screenshot shows the 'Provider's Earnings History' window. The 'Sort Order' dropdown is set to 'Sold-To Name'. The window includes various filters for Order Date, Install Date, Delivery Date, Pay Date, and HR Pay Date, each with 'Use' checkboxes and date range inputs. There are also checkboxes for 'Print Legend' and 'Print Preview', and buttons for 'Reset', 'Print', and 'Cancel'.

With this option selected it is not necessary to print the sold to name under each line, so it will be grayed out when the Sort order is sold to name.

The close-up shows the 'Sort Order' dropdown menu. The 'Print Sold-To Name' option is circled in red, indicating it is disabled when 'Sold-To Name' is selected.

Discounts in Customer Payments

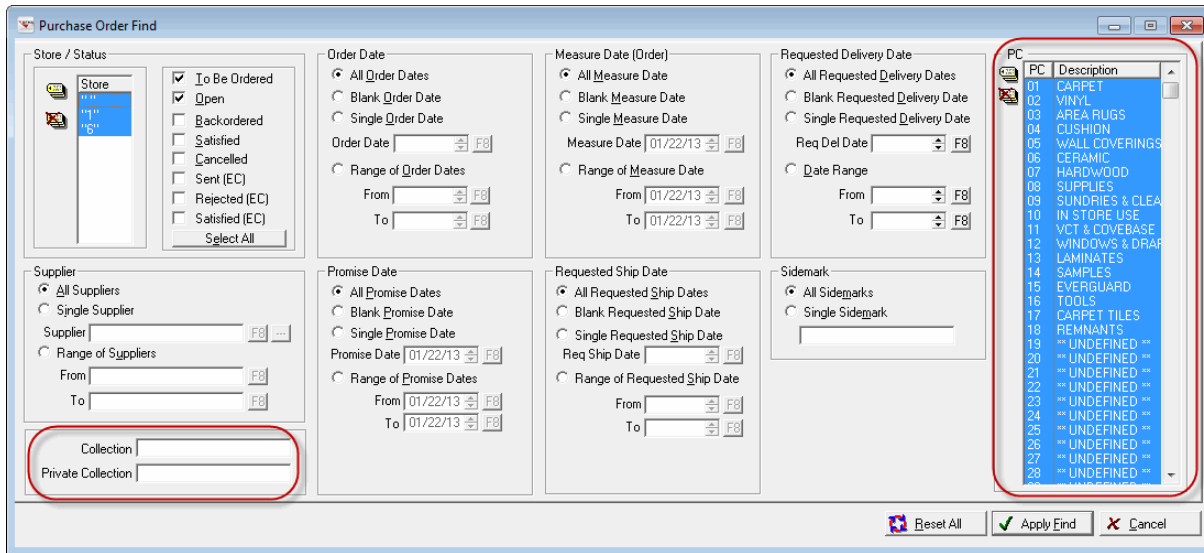
The discount can now only be coded to the standard account codes for Discounts (As of version 12.0) or Finance Charges. (As of 12.0.8422 1st revision release)

Manually reversing an AR deduction is no longer required as voiding a payroll check automatically does the reversals. (As of 12.0.8422 1st revision release)

If clients are using a customer order to transfer materials between stores,(or any other non standard procedure) they will need to code the discounts to the discount account code and do journal entries for other coding that might be needed.

Purchase Orders Custom Display Find

Inventory>File>Purchase Orders>Find button



The options to find purchase orders based on Collection, Private Collection and Product Code have been added.

Picking Tickets

Picking Tickets will now show Seq # for Products (Rolls, Items and Services). To print a picking ticket for lines with product records only, the option to print cut lines only cannot be checked.

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1:12PM

Picking Ticket

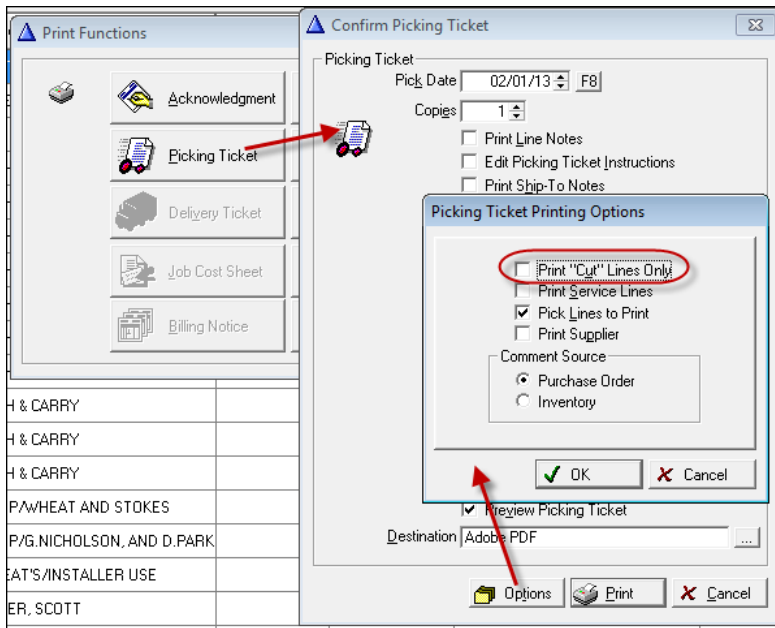
MY NEW STORE

Invoice:
CG302561

Sold To CUSTOMER, TEST	Ship To CUSTOMER, TEST	Pick Date: 02/01/13
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Sales Representative: [Name]
Paid in Full: No

Prod Code	Roll/Item No.	Width	Beginning Amount	Amount Required	Ending Amount	Units	Status	Location	Store	Sign
*Line # 0001	18TH HOLE - 12"/DILLY DALLY	120"		1'0"	----		None			
01										
Color Number: 538430 SKU: 736U676311										
*Line # 0002	ACANTHUS - 1'8"X2'8"/GREEN			1.00	----	EA	None			
03	CG-MIRAACAN									
Color Number: 26300 Width x Length: 0'20.04"X0'32.04"										



Products Tagging

The tagging to print Price Tags is now user specific. One user can tag some products while another user tags a different group of products and when each user prints tags, only their tags will be printed.

