



Systems for Success

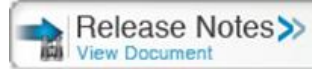
A decorative graphic on the right side of the page, consisting of three overlapping, curved shapes. The top shape is light gray, the middle is dark red, and the bottom is black. The text 'Version 15.0 User Guide' is overlaid on the red and black sections.

Version 15.0 User Guide

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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.







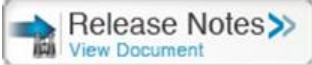
To see what you may have missed in previous updates click here.





















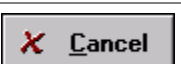










[For directions on loading updates to the RFMS software, click here.](#)

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

 Notes:	Indicates extra Information
	This symbol indicates a best practice, or an example.
<u>Setup</u> >System Setup	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.
Field Name	Indicates a Field Name or button Name
Important	Important information
Screen Shots	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.
Links to other topics	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!
User Defined FIELD	RFMS has many fields that can be user defined. In the documentation these will be shown in all capitals with the abbreviation UD before the field name. 
Update Release Notes	Update documents contain only the new features contained the software updates. For all changes see the release notes on the download webpage. Click the release notes button to find these. 

RFMS Button and Menu Conventions

 	Exit the current screen. Can also use the Escape key on the keyboard.
	Access the help file. Can also use the F1 Key on the keyboard.
	Activates or selects the highlighted record.
 	Add a new record. Can also use the Insert key on the keyboard.
 	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 to the default settings.
	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, non-graphic files or web sites.
	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.








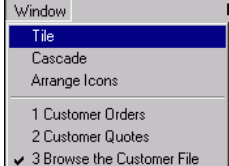



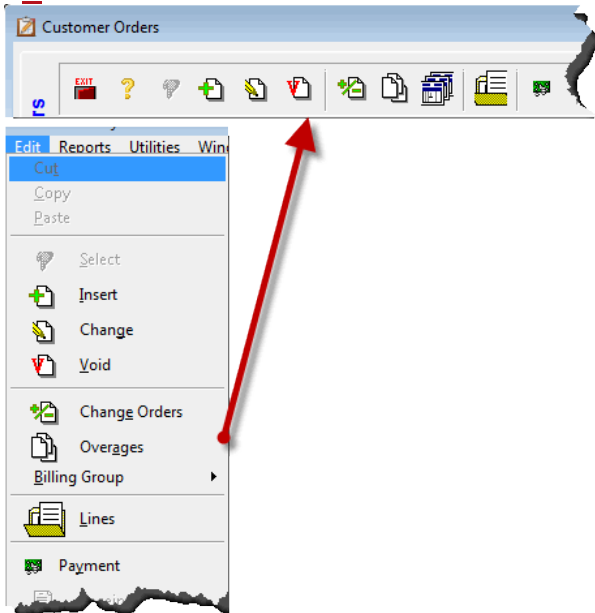
	View the history of a record.
 or 	View the pdf history of reports for the highlighted record.
 or 	Click to view the tracking record created for every record insert made into Orders, Quotes and Bid Pro Estimates. If gray, no records are present.
	Brings up the Client Management remote actions screen 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.
	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.
	Access to customizing the tool bar
	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>
<p>Edit Menu</p>	<p>The Edit Menu can be used as a shortcut to the toolbar options.</p> <p>>Edit></p> 

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Payroll Update

This version includes the Payroll Update for 2015.

This includes any Federal Tax changes for US and Canada.

The following areas had tax table changes.

United States

Arkansas

California and California Head of Household

Connecticut

Idaho

Illinois

Kansas

Kentucky

Maine

Massachusetts

Minnesota

Missouri

New Mexico

New York State and Yonkers

North Carolina

Oklahoma

Oregon

Rhode Island

Vermont

Washington DC

Canada

Alberta

British Columbia

Manitoba

New Brunswick

Newfoundland

Northwest Territory

Nova Scotia

Nunavut

Ontario

Outside Canada and Providences

Prince Edward

Saskatchewan

Quebec

Youkan

System Wide

Email

x>Utilities>System Options>Email Configurations

If using Outlook, the setup now allows Outlook for single emails and SMTP when sending mass emails. This automates the process so that users do not have to hit send on each email as in the case of check stubs and using templates in CMM

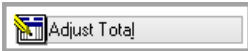
Order Entry

Customer Orders

Line Groups

To ensure the correct line group is chosen, when a line is assigned to a Line Group that has a different Product Code, then the Line Group Product Code will be cleared. If there are no Product Codes assigned to ANY Line Group, then the previously assigned Line Group will be retained.

Adjust Total (Orders and Quotes)



Adjust Total for Quotes was introduced in version 14.2.

This button will be disabled when Order Total = 0 or there are less than two Lines.

The following warning appears when you click the Adjust Total button

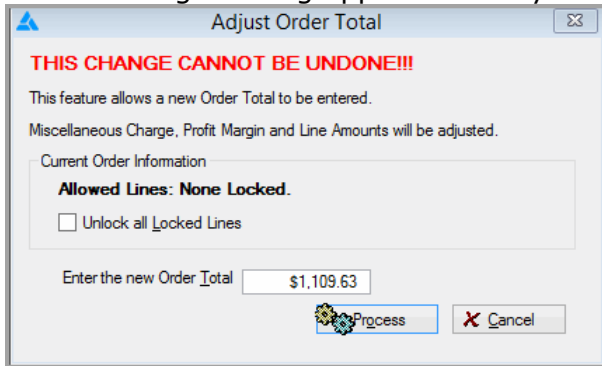


Figure Adjust Order Total Warning



Notes:

Order and Quote Adjust Total button now works with GST Included.

Provider



When adding a new Provider record and carrying forward information from the highlighted record, the new record will use the Installation Date from the highlighted record instead of today's date.

Emailing Invoices

Invoices can now be emailed from the Job Cost Screen even if there is no email present in the order. The email will open and the address can be typed into the email.

Customer

Customer Sales Reps

The Sales Rep field is initially locked. Pressing the lock will unlock the field so sales representatives can be changed. This allows a password to be set and required on the button.

Inventory

Inventory Move

The Inventory Move feature is an add-on program that allows moving multiple inventory records to other store locations within the RFMS Inventory program. With the June 2013 update a new feature was included allowing a store to use the order lines to initiate the process of transferring inventory. This

also allows partial amounts of an inventory record to be transferred. Please contact the [RFMS Sales Department](#) for information on purchasing this product.

Process Requested Inventory

A notes section has been added.

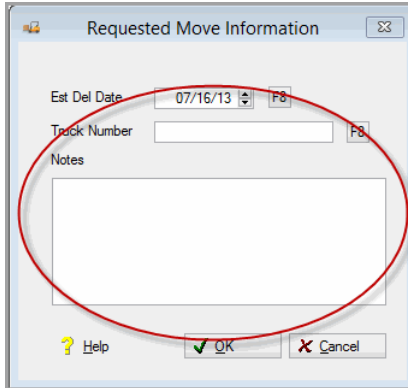


Figure Requested Move Information

Process Requested Inventory no longer moves the inventory to the new store. This step is now completed when the move is Accepted in Receive Moved Inventory.

Inventory Move Tracking Sheet

The Order Invoice Number, Estimated Delivery Date, Carton Count and Ship To Name have been added to the Tracking Sheet

Inventory Move Tracking Sheet						(Original) Page 1
Transaction # 1022			Printed 03/12/15 3:13 PM			
Origin Store:"1" MY NEW STORE 82 SKYLAND BLVD TUSCALOOSA, AL 34758 Tel: 205-943-2282			Destination Store:" " DOCUMENTATION COMPANY STORE ADDRESS FAX: 111-222-3333 NORTHPORT, AL 35478			(T49T32T1022)
Roll/Item #	Product Code	Style/Iter	Width	Length	Quantity	
PRIVATE	ITEM NUMBEI 08 - SUPPLIES	PRIVATE ITEM NAME	7.32	50.59	4.00 SF	
Color:#PRIV COLOR #	Dye Lot:RUN	Color/Desc:DESCRIPTION			Moved 12/30/14	
Carton Size: 8.1111 SF per BX	Received _____	Old Loc _____	New Loc _____	Rovd By _____		
Carton Qty: There are 0.8545	Sys Ref #45357	Sidemark:	*In-Transit*			
Unit Ship Weight# oz		Line Total Ship Weight# oz				(S25)
Notes						
Est Del Date:	Invoice Number:G401021	Ship To: CUSTOMER LAST, CUSTOMER FIRST				

The number of boxes per buy/sell quantity have been added to the sheet.

For example:

If Buy/Sell is 16 per box and the Move is for 48 then it will read "Carton Size: 16 SF per BX" and "Carton Qty: There are 3 BX"

Products

Rolls

File>Rolls

The following features have been added to the Roll Product Record Extended Information 2 tab. This information will be used in a future version of Measure.

- Measure Product Checkbox
- Estimating Unit Drop Down Menu with Imperial and Metric
 - This field if left blank will default to the Global System Option setting.
 - If this field is changed, the user will be asked if they want to clear the estimating data.
- This does not include the waste factor or the measure product checkbox
- Seam width will be stored as entered
- Cut Gap will be stored as entered
- Waste Factor will be stored as a decimal not as a percent.

The screenshot shows a software window titled "Changing a Roll Product" with two tabs: "Product Information 1" and "Extended Information 2". The "Extended Information 2" tab is active. It contains several input fields and checkboxes. A red circle highlights the "Estimating Information" section, which includes:

- Measure Product
- Estimating Unit: Imperial (dropdown menu)
- Cut Gap: 0.0000 In 0 Inches
- Seam Width: 0.0000 In 0 Inches
- Pattern Width: 0.0000 In 0 Inches
- Pattern Length: 0.0000 In 0 Inches
- Pattern Drop: 0.0000 In 0 Inches
- Waste Factor: 0.0000%
- NHMS Product

Figure Roll Extended Information Tab

The Pattern Drop, Pattern Length and Pattern Width fields will now store data as entered with the units based on the estimating unit.

Items

File>Items

The following features have been added to the Item Product Record Extended Information 2 tab. This information will be used in a future version of Measure.

- Measure Product Checkbox
- Estimating Unit Drop Down Menu with Imperial and Metric
 - This field if left blank will default to the Global System Option setting.
 - If this field is changed, the user will be asked if they want to clear the estimating data.
- Actual Length will be stored as entered.
- Actual Width will be stored as entered.
- Waste Factor will be stored as a decimal not as a percent.

Changing an Item Product

Product Information 1 Extended Information 2

Additional Product Spec

Private Collection

Price /Cost Code

Construction

Country F8

Fiber F8

Species F8

Inventory User #

Shipping Weight

Thickness mm F8

Ship Qty Variance (+/-) oz F8

Primary Component
Composition
Type

NHMS Product

Estimating Information

Measure Product

Estimating Unit

Actual Length In 0 Inches

Actual Width In 0 Inches

Pattern Width In 0 Inches

Pattern Length In 0 Inches

Pattern Drop In 0 Inches

Waste Factor

Last price formulas applied date:

Last item cost used for pricing:

Figure Item Extended Information Tag

The Pattern Drop, Pattern Length and Pattern Width fields will now store data as entered with the units based on the estimating unit.

Services

File>Service

The Measure Product Checkbox has been added to the Service Product Record Extended Information Tab. This information will be used in a future version of Measure.

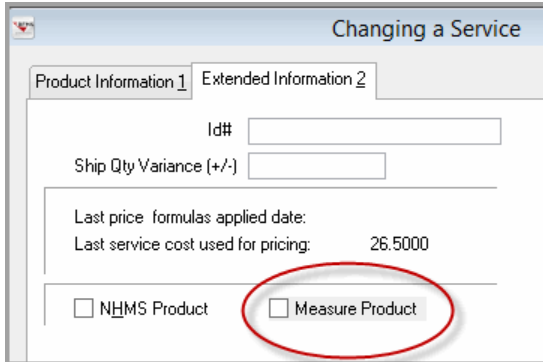


Figure Service Extended Information Tab

Accounting

Accounts Payable

Accounting>File>Accounts Payable

Spacing between the detail lines now follow the interface settings from system options.

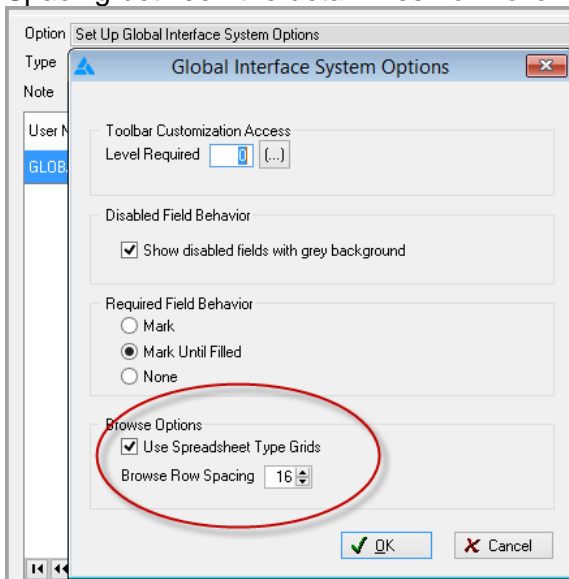


Figure Set Up Global Interface System Options

Suppliers

[Accounting](#)>[File](#)>[Accounts Payable](#)>[Suppliers](#)

A "Do Not Print Tax Document" checkbox has been added to Supplier information. If this box is checked, the subcontractor's tax document will not be printed, even if the Supplier has a Tax ID and meets the \$600 minimum.

The screenshot shows a 'Record Will Be Changed' dialog box for a supplier. The 'Supplier' field contains '1099 SUPPLIER NEW'. The 'Pay To' field also contains '1099 SUPPLIER NEW'. The 'Tax ID Number' is '511-86-9567'. The 'Purchased (Gross Past Year)' and 'Purchased (Net Past Year)' are both '10,560.00'. The 'Pay Status' is 'OK to Pay'. The 'Do Not Print Tax Document' checkbox is circled in red.

Figure Supplier Information

Month End GST Report

[Accounting](#)>[File](#)>[Month-End](#)>[GST Report](#)

Bank Charges, Deposits other than sales and Sub Contractors Payroll are now included in the Month End GST Report. Only transactions that occur after the update will be included.

BAS Summary is now included as the last page.

Page No: 2
28/11/14
03:01PM

CARPET COURT NEW ZEALAND
GST Report
From 28/11/14 To 28/11/14
* Denotes Journal Batch Number

Date	ID#	Name	Rate	Sale Value	Purchase Value	Tax Collected	Tax Paid
Suppliers you have made				Acquisitions you have made			
		Total sales & income & other supplies (G1)	3,002		Capital Acquisitions (G10)		0
		Adjustments (G7)	0		Other Acquisitions (G11)		25
		Total Supplies after Adjustments (G8)	3,002		Adjustments (G18)		0
					Total Acquisitions after Adjustments (G19)		25
		GST Payable (G9)	0		GST Credit (G20)		

Figure BAS Summary

Human Resources

Check Stubs

Printing checks now has the option to print the company name on the stub. Additionally, if the option is selected to print the check number, it will also appear on the line with the company name.

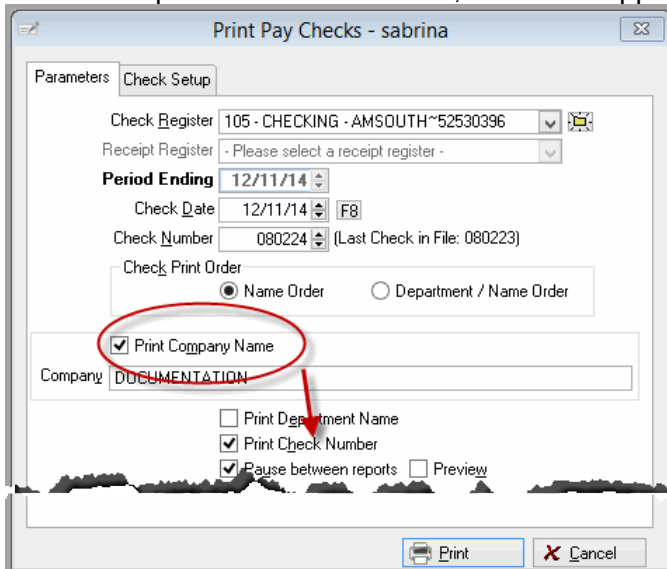


Figure Print Pay Checks

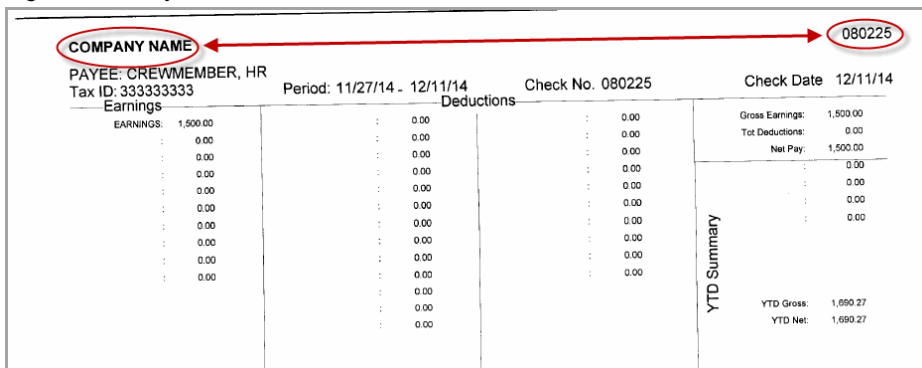


Figure Check Stub

Earning Descriptions

Earnings descriptions have changed as follows:

Old	New
Total Gross	Federal Gross
Federal Gross	Federal Taxable
FICA Gross	FICA Taxable
State Gross	State Taxable
Local Gross	Local Taxable

Australia and New Zealand

Australia and New Zealand can now exempt earnings and deductions from Superannuation. The [E]xempt and [R]eductions buttons will give four choices: (1) Earnings, [2] Superannuation, [3] Earnings and Superannuation, [4] No Exemptions.

The amount eligible for calculating Superannuation is shown on screen as "Super Gross" and is below "Federal" earnings. The Super Gross is now used for Superannuation calculations. Super Gross will show on Payroll Stubs and Reports right next to Federal Taxable.

Sales Reports

Demographics Report

File>Marketing>Demographics Report

The City and State information has been added to the .csv output.

1	Store	Zip	Num of Sa	MatOnly	SalesTax	OtherChai	InvTotal	Customer	% of Cust	% of Store	% of Sales	City	State
2	" "	35111	2	302.88	10.09	18.85	331.82	CASH & CA	32.498	31.353	0.388	MAIN	AL
3	" "	35475	1	631.72	56.85	0	688.57	CASH & CA	67.437	65.061	0.805	NORTHPO	AL
4	" "	35015	1	34.2	3.08	0	37.28	RETAIL	100	3.522	0.044	CITY	AL

Figure Demographics Report CSV

Add On Modules

Client Management

Appointments

When adding a new appointment and selecting a related record, users can choose to use the Ship To or Sold To location.

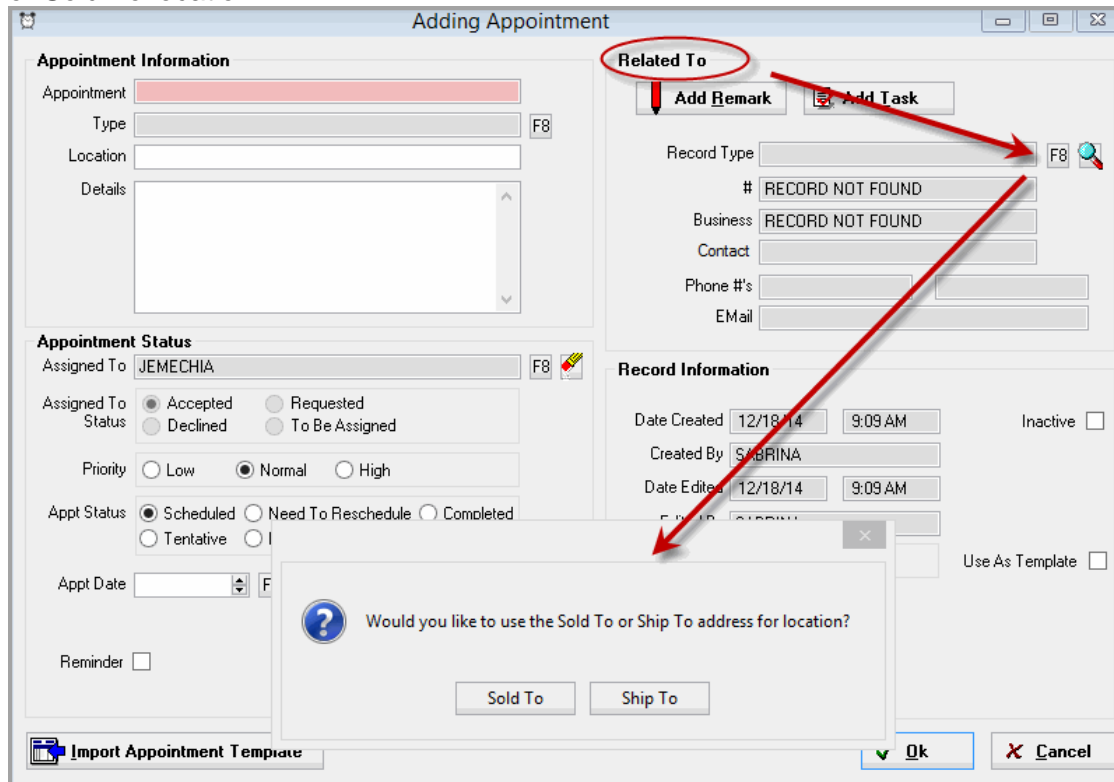


Figure Adding Appointments Screen

Leads

The PO Number and Job Number have been added to the Related Quotes, Estimates and Orders browse tab on the Edit Sales Lead screen.

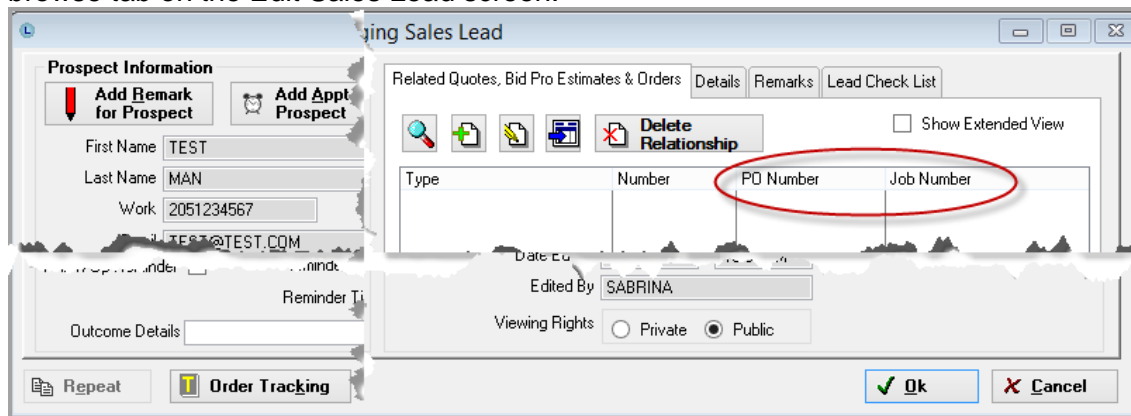


Figure Edit Sales Lead Screen

BidPro

Printing Estimates

Edit>Print Estimate

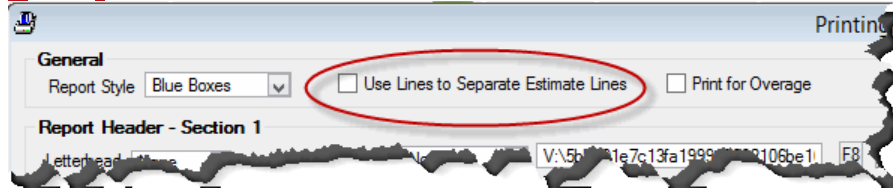


Figure Print Estimate Screen

The “Use Lines to Separate Estimate Lines” Checkbox has been added. If this box is not checked the line notes will be boxed.

Contract Pricing

If Store Specific is set up,

- The Store Column will be in the Contract Details Browse. Lines without stores assigned will show “—” in the Store Column.
- The first column in the product selection browse is now the Store number.



Notes:

When Contract Pricing is opened, if there are contract lines with no store, a warning with a list of the contracts will appear. There will also be an option to check if the warning is to not appear again.

If the user is setup for store specific pricing and tries to enter the same product from the same store to a contract there will be a warning message.

Enterprise Manager

Audit for System Options

System options that do not require a complex screen are now available to be audited. This includes Yes/No, Pick List, Entry etc. If a screen pops up with multiple options it is not currently audited.