



Systems for Success

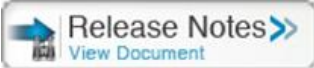
A decorative graphic consisting of three overlapping, curved bands. The top band is light gray, the middle band is dark red, and the bottom band is black. The bands curve upwards from left to right.

Version 16.99
Payroll Update Document

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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.






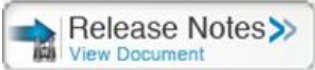
To see what you may have missed in previous updates click here.














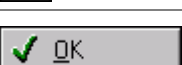
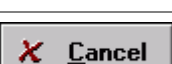








[For directions on loading updates to the RFMS software, click here.](#)








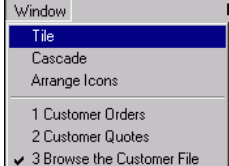



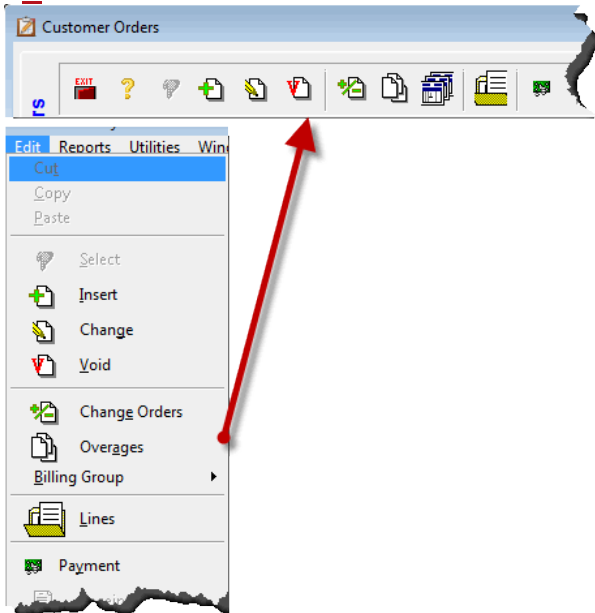
The same documentation is included in the on-line help system and can be accessed by pressing the F1 button at any RFMS screen. If there is something on the screen that you either don't recognize or understand, check this document or refer to the Help Files pressing F1.

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>User Defined FIELD</p>	<p>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.</p> <div data-bbox="594 1604 1330 1705" style="border: 1px solid gray; padding: 5px;"> <p>UD JOB # <input type="text"/></p> <p>UD HEADER LABEL 1 <input type="text"/></p> <p>UD HEADER LABEL 2 <input type="text"/></p> </div>
<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. 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> 

Payroll Update

This version includes the Payroll Update for 2017.

This includes any Federal Tax changes for US and Canada.

The following areas had tax table changes and form changes.

United States

- Colorado
- Connecticut
- District of Columbia
- Idaho
- Illinois
- Indiana
- Kentucky
- Maine
- Minnesota
- Missouri
- Nebraska
- New Mexico
- New York State
- North Dakota
- Oregon
- Oklahoma
- Rhode Island
- South Carolina
- Vermont
- Yonkers, NY

Canada

- Federal
- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland and Labrador
- Northwest Territories
- Nunavut
- Ontario
- Saskatchewan
- Yukon

For End of the Year documents, click [here](#).

Order Entry

Utilities

Cities

[Utilities](#)>[Set Up](#)>[Cities](#)

Batch Adjustment for State Tax



To adjust all the cities for one state, click the Percent Icon and the Adjust Rates for selected States screen will open.

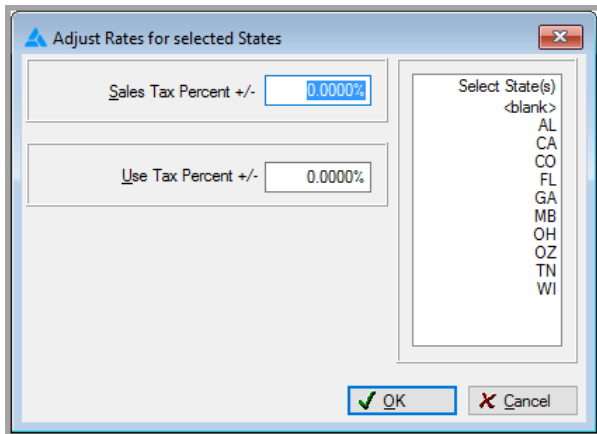


Figure Adjust Rates for selected States

Adjust the Sales Tax or Use Tax percent appropriately by entering the amount that the percent has changed (not the actual tax percent).

Select the states need to be change from the list on the right. This list is pulled from all the cities in the city list.

Click Ok.

Human Resources

Prepare Pay

Accounts Receivable Pay Deduction

The Accounts Receivable Pay Deduction screen now has a “Filter by Name” checkbox. This checkbox will default to being checked which means only Orders that match the name of the worker will be viewed. By unchecking this box, the user will be allowed to look for other Orders.

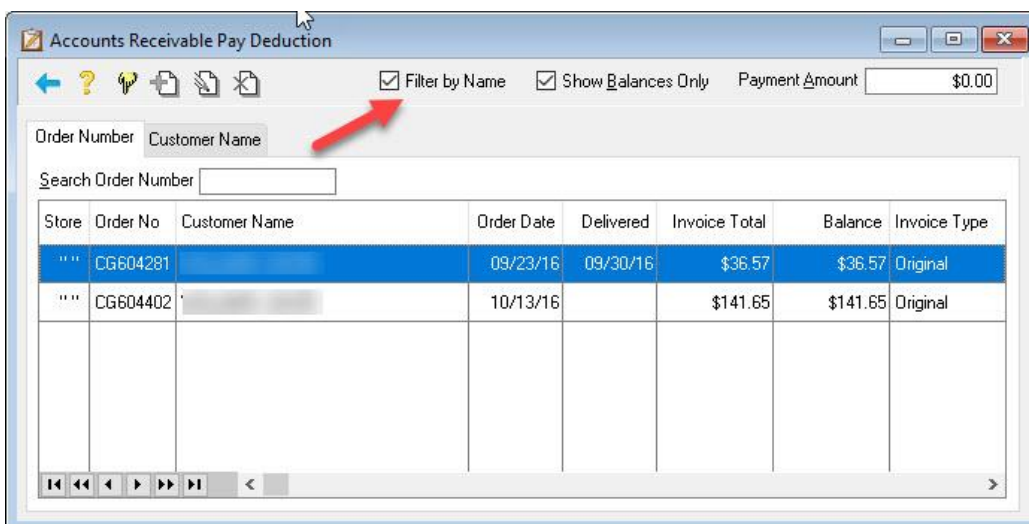


Figure Accounts Receivable Pay Deduction screen

Reports

Worker Information

Reports > Worker Information

The ability to print License Information has been added to the Worker Information Report.

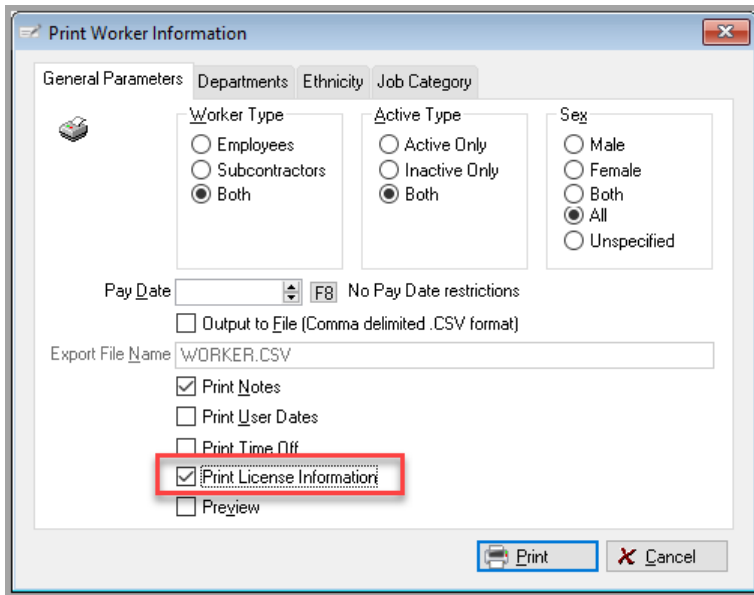


Figure Print Worker Information screen