



Systems for Success

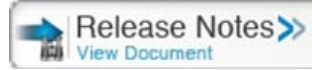


Version 17.0.0 – 17.0.10
Update Document

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Tuscaloosa, AL 35405

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.















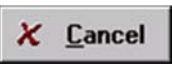








[For directions on loading updates to the RFMS software, click here.](#)

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>System Setup</u>	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. <div data-bbox="594 1604 1328 1705" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border: none; padding-right: 5px;">UD JOB #</td> <td style="border: 1px solid gray; width: 100%;"></td> </tr> <tr> <td style="border: none; padding-right: 5px;">UD HEADER LABEL 1</td> <td style="border: 1px solid gray; width: 100%;"></td> </tr> <tr> <td style="border: none; padding-right: 5px;">UD HEADER LABEL 2</td> <td style="border: 1px solid gray; width: 100%;"></td> </tr> </table> </div>	UD JOB #		UD HEADER LABEL 1		UD HEADER LABEL 2	
UD JOB #							
UD HEADER LABEL 1							
UD HEADER LABEL 2							
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. <div data-bbox="1084 1780 1399 1852" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="border: none; padding-right: 5px;"></td> <td style="border: none; padding-right: 5px;">Release Notes</td> <td style="border: none; padding-right: 5px;">>></td> </tr> <tr> <td style="border: none; padding-right: 5px;"></td> <td style="border: none; padding-right: 5px;">View Document</td> <td style="border: none; padding-right: 5px;"></td> </tr> </table> </div> Click the release notes button to find these.		Release Notes	>>		View Document	
	Release Notes	>>					
	View Document						

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.








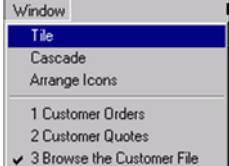



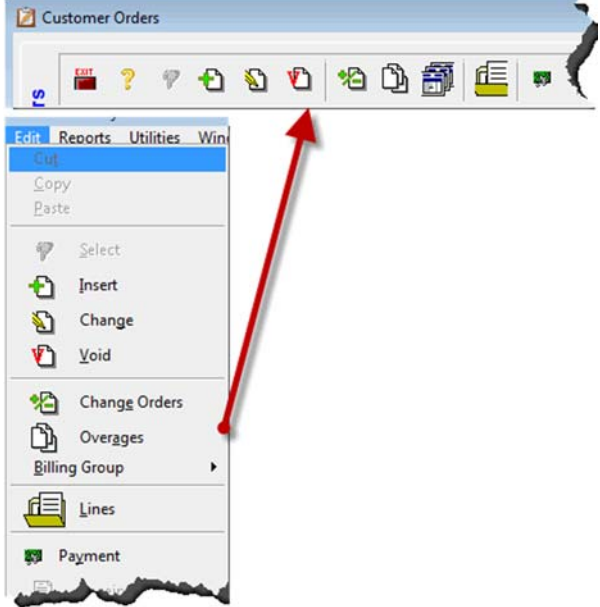
	View the history of a record.
 or 	View the pdf history of reports for the highlighted record.
 or 	Click to view the tracking record created for every record insert made into Orders, Quotes and Bid Pro Estimates. If gray, no records are present.
	Brings up the Client Management remote actions screen 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 data-bbox="159 1381 289 1413">Edit Menu</p>	<p data-bbox="407 1056 1230 1087">The Edit Menu can be used as a shortcut to the toolbar options.</p> <p data-bbox="407 1094 500 1125">>Edit></p> 

Table of Contents

SYSTEM WIDE	7
Add Ons that are now part of RFMS Core.....	7
Customers with the Same Name	7
Word Merge	7
RFMS Smart Search	7
Copy Browse (Ctrl-Alt-Shift-C).....	7
Attachments.....	9
Ctrl-S	9
Output to CSV	10
Timestamping	10
Notes (Version 17.0.1).....	11
System Options	11
ORDER ENTRY	13
Order Entry	13
System Options	14
Config Creator	15
Customer Orders	16
Quotes	24
Customers	24
Products from Order Entry.....	27
Bar Codes.....	28
Dashboard	29
INVENTORY	33
Assign Inventory	33
Purge Inventory	33
Purchase Orders	34
Receiving/Costing.....	36
Rolls and Items.....	38
Beginning Inventory, Return Found and Acquired/Merged	40
Barcoded Inventory	40
Truck.....	41
Inventory Move	42
Reports	45
PRODUCTS	47
System Options	47
Find Screen	47
Rolls/Items.....	48
General Range Edit.....	48
Price Range Edit.....	50
Reports	50
Utilities	51
ACCOUNTING	52

Accounts Receivable.....	52
Accounts Payable.....	53
General Ledger.....	58
Banking.....	59
Sales Commission.....	60
Month End.....	60
Utilities.....	61
HUMAN RESOURCES.....	62
Providers.....	62
Pay History.....	62
941 Quarterly Report (Version 17.0.1).....	62
Sick Leave (Version 17.0.1).....	62
Tax Changes (Version 17.0.6).....	62
Tax Changes (Version 17.0.8).....	63
IRS Tax Information (W-2 and 1099-MISC) (Version 17.0.6).....	63
SALES REPORTS.....	63
Materials Analysis.....	64
Sales.....	64
Profitability.....	65
E-COMMERCE.....	66
Web Services.....	68
MULT-PAY.....	69
BIDPRO.....	69
SCHEDULE PRO.....	70
Scheduled Jobs.....	70
Schedule New Jobs.....	71
Quick Edit (Version 17.0.1).....	71
Weekly Grid.....	72
Alerts.....	72
Reports.....	73
CLIENT MANAGEMENT.....	74
Sales Leads.....	74
Projects.....	74
PROPERTY CONNECT.....	75
Notes (Version 17.0.1).....	75
INSTALLER PRO MOBILE.....	75

System Wide

Add Ons that are now part of RFMS Core

Batch Job Costing, Product Import/Export (PIE), Color Crossover, and Hyper Pay are now part of RFMS Core. To use any of these, an access code is required that will be received after purchasing and attending training. Please contact your [RSA](#) for cost.

Customers with the Same Name

RFMS now allows customers with the same names to be entered. RFMS looks at the Customer's Name and Telephone 1 field to see if it is a duplicate customer. If those two fields are the same as one already entered, then it will not be allowed to duplicate.

Word Merge



This feature exports data for Invoices, Quote, or Estimate into a csv file and then merges it into an existing Microsoft Word Merge Template.

The Microsoft Word Merge Template can be customized by users to fit their specific needs. Below is a list of some things that can be customized.

- Adding Fields
- Deleting Fields
- Changing Font Style, Size and Color
- Changing the Placement of Fields
- Inserting Additional Text
- Adding Supplemental Pages

For more details on how create a template, click [here](#).

RFMS Smart Search

The ability to use the Enter key as well as the tab key to execute the search in has been added.

The Private Color Number field has been added to the Products RFMS Smart Search. **(Version 17.0.5)**

Copy Browse (Ctrl-Alt-Shift-C)

Ctrl-Alt-Shift-C now copies all the data from the filtered browse screen. Before, Ctrl-Alt-Shift-C only copied the data you could see on the page.

For more information, click [here](#).

The ability to copy the System Option browse has been added **(Version 17.0.5)**. Filter by the System Options you are looking for and then Ctrl-Alt-Shift-C.

Browse System Options - Admin

Change Value Change Hidden Setting Change Type Copy System Options

Filters

- Select Types: Global, Assigned, User
- Select Modules: Accounting, Bid Pro, Client Management, Contract Pricing, E-Commerce, Inventory, Multiple Invoice Payment, Order Entry, Products, Resources & P...
- Select Applies To: Accounting, Alerts, B2B Distribution, Bid Pro, Billing Groups, Buying Groups, Capacity Settings, Claims, Commissions, Contract Pricing, Costing/Res...

Select Category: All

Search Option Field for Text: lock

Select User: F8

Hidden	Type	Module	Applies To	Category	Option	Value	Note
	Assigned	Order Entry	Order Entry	Authorization	Lock Order Line	User Specific Values	
	Assigned	Order Entry	Order Entry	Authorization	Lock Order Sold To	User Specific Values	
✓	Global	Order Entry	Order Entry	Authorization	Lock Sales Representative after Initial Save	Yes	
✓	Global	Order Entry	Order Entry	Authorization	Lock Sales Representative if from Customer	No	
✓	Global	Order Entry	Order Entry	Authorization	Lock Tax Status after Initial Save	Yes	
✓	Global	Order Entry	Order Entry	Authorization	Lock Tax Status if from Customer	Yes	
	Global	Bid Pro	Order Entry	Data Transfer	Lock Order Entry Lines when Exporting from Bid Pro	Always Lock Total	
✓	Global	Human Resources	Accounting	Configuration	Departments Set Up / Unlock	Multiple Options	

Figure System Option Browse screen.

Next, Paste into a spreadsheet.

	A	B	C	D	E	F	G	H
1	Hidden	Type	Module	Applies To	Category	Option	Value	Note
2		Assigned	Order Entry	Order Entry	Authorization	Lock Order Line	User Specific Values	
3		Assigned	Order Entry	Order Entry	Authorization	Lock Order Sold To	User Specific Values	
4		Global	Order Entry	Order Entry	Authorization	Lock Sales Representative after Initial Save	Yes	
5		Global	Order Entry	Order Entry	Authorization	Lock Sales Representative if from Customer	No	
6		Global	Order Entry	Order Entry	Authorization	Lock Tax Status after Initial Save	Yes	
7		Global	Order Entry	Order Entry	Authorization	Lock Tax Status if from Customer	Yes	
8		Global	Bid Pro	Order Entry	Data Transfer	Lock Order Entry Lines when Exporting from Bid Pro	Always Lock Total	
9		Global	Human Resources	Accounting	Configuration	Departments Set Up / Unlock	Multiple Options	
10								

Figure Copied System Option Browse in Spreadsheet.

Attachments

The ability to drag and drop files from the File Explorer/Desktop to the Add Attachment window has been added.

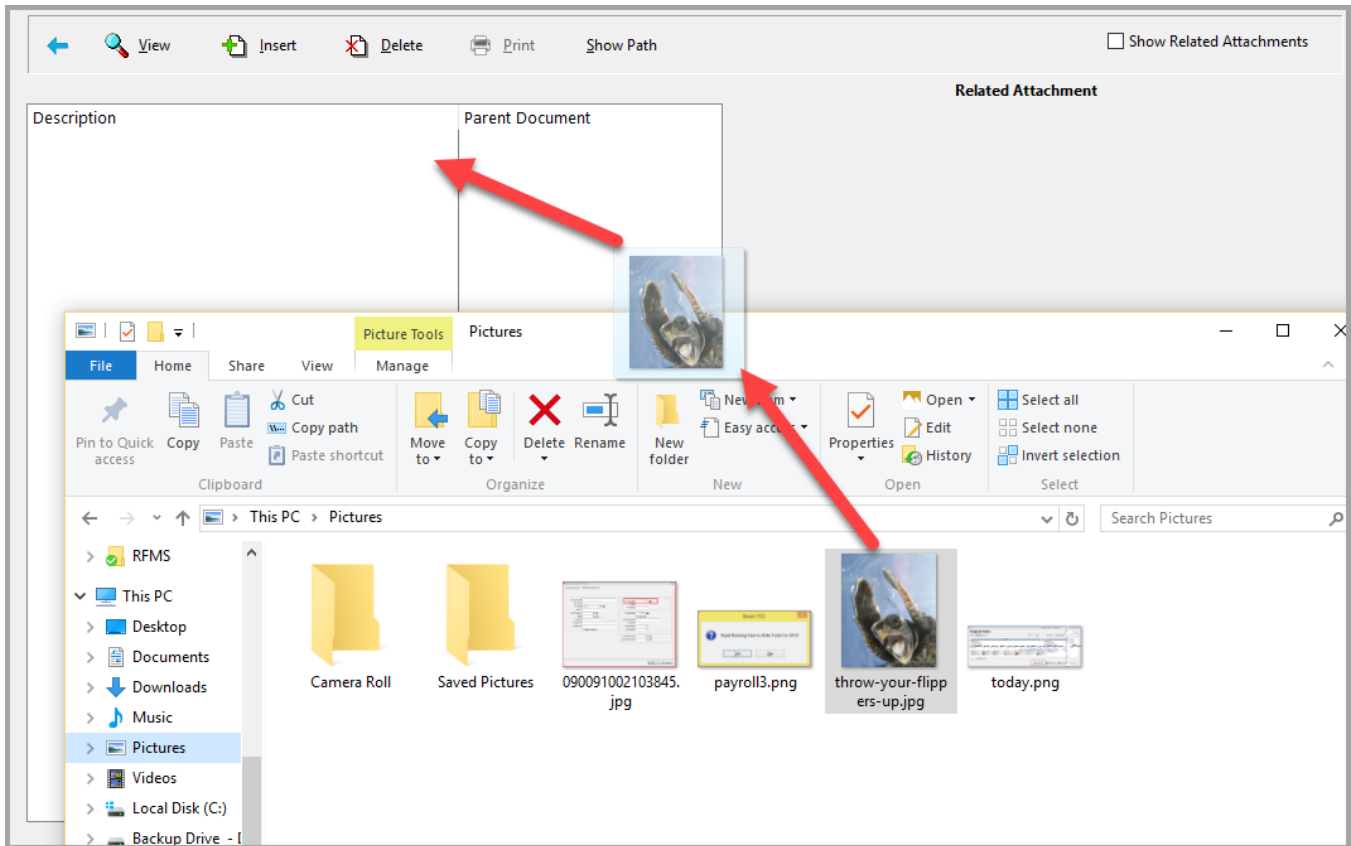


Figure Drag and Drop Attachments

Ctrl-S

When entering a search term, you can check to start at the top. This will start the search from the top of the list no matter what line is currently highlighted.

This function allows searching within a filtered browse list.

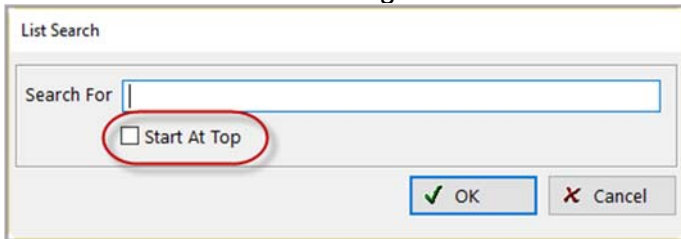


Figure Ctrl-S screen

Output to CSV

The ability to pick the file name and location from a dialog box has been added. This is now sticky per report/per user. This pertains to reports in Accounting, Sales Reports, Inventory, Order Entry, and Products.

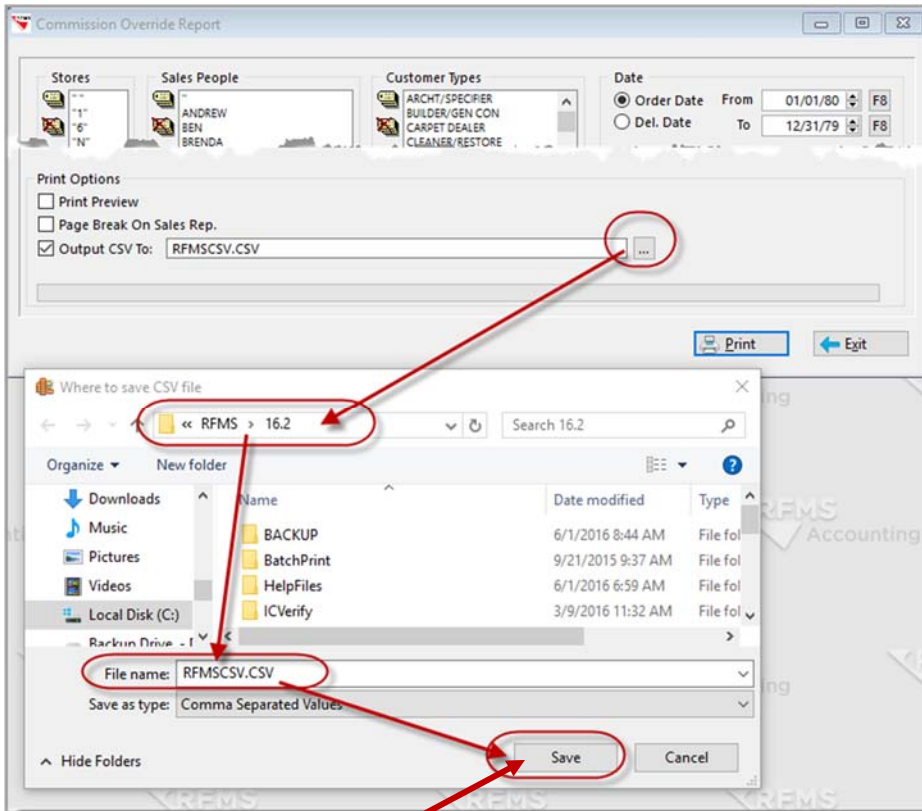


Figure Report CSV Save Example



Notes:

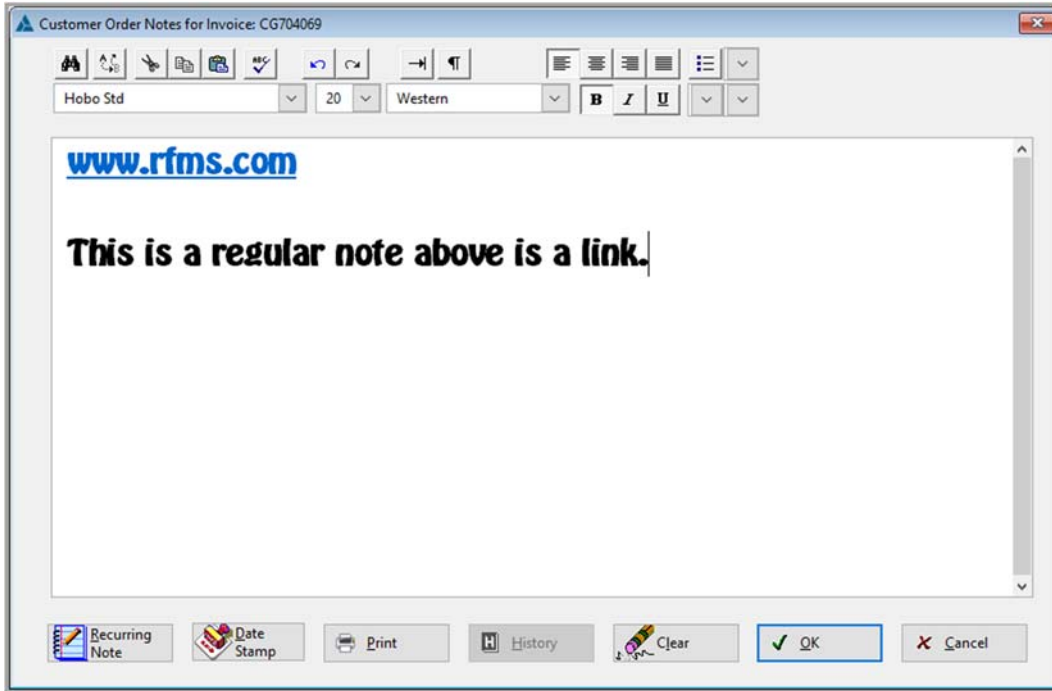
Once Save has been hit, the same location and file name will pull into the Output to CSV field. This allows restricting output to the RFMS drive.

Timestamping

Timestamping is now turned on for all tables in the database. Enterprise Manager no longer has the ability to manage timestamping.

Notes (Version 17.0.1)

A link that has been added in notes can now be clicked on and the default browser will load the page.



System Options

Set Leave Specifications (Sick, Vacation, Holiday, Other)

x>Utilities>System Options>System Wide>Accounting

Category Configuration

Type- Must be Global 

This system option now can accrue Sick and Other leave.

Figure Leave Policy Initialization

- Accrual – Leave time is accumulated over time. See Sick Leave Section below.
- No Accrual/Up Front – The entire amount is posted to the employee on the anniversary of the Yearly Period (Start of Payroll Year or Hire Date)

Sick Days Tab (When Accrual is selected)

Accrual:

- Sick Days per Year – This specifies the number of sick days allowed to be accrued per year. Only whole days can be entered. (3 days x 8 hours = 24 hours)
- Maximum Rollover Sick Days – If the employee has any sick days left over at the beginning of the specified Yearly Period, those remaining days may be rolled over into the next year's sick day amount. However, as the example shows, a maximum of 6 sick days may be accumulated.
- New Employee Probation Days Period – A new employee does not begin to accumulate sick days until they have worked for the company for 90 days. Once that threshold is reached, Sick days will be accrued on every subsequent pay day.
- Earn Rate: 1 Hour for every 30 Hours of work – If an employee works and is paid for a 40 hour week, they will have earned one hour of sick time. 10 hours of time will be retained. On the next pay period, if the employee again works 40 hours, they will earn another hour of sick time with 20 hours of time retained. After two more 40 hour pay periods, the employee will have earned an extra hour.



Notes:

For first time set up if using Hire Date as the starting point, hours/days earned will need to be entered manually on the Worker Information screen. From this point on, when the hire date rolls around the correct numbers will be added.

The screenshot shows a software window titled "Changing a Personnel Record" with a tabbed interface. The "Dates and Leave Time" tab is active. On the left, there are several date fields: "Last Pay Date" (12/27/2016), "Birth Date", "Last Pay Base", "Hire Date" (01/07/2016), "Termination Date", and five "User Date" fields (#1 to #5). On the right, there is a section for leave types: "Sick Days" (0.00), "Vacation Days" (1.00), "Holiday Days" (5.00), and "Other Leave" (20.00). Below these is a checkbox for "Auto Update PTD" which is checked, and a "Leave Year" field set to "2017". The "OK" and "Cancel" buttons are at the bottom right.

Figure Worker Information screen

How are hours counted?

- Hourly employees – Hours worked is simply counting the hours worked in the Earnings section of the payroll process.
- Salaried employees-Hours are calculated by 8 Hours Worked x 5 days = 40 hour week. This will change based on how “Hours Comprising a Work Day” is set.

Order Entry

Order Entry

The confirmation pop up box has been removed from Orders, Quotes, and Claims. The Save button will automatically save and close the screen.

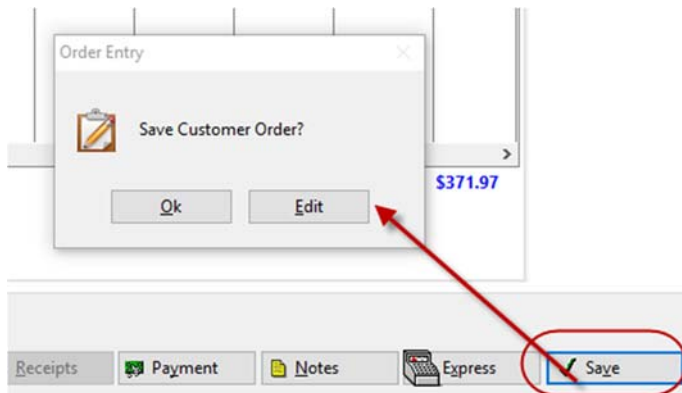


Figure Save Order confirmation

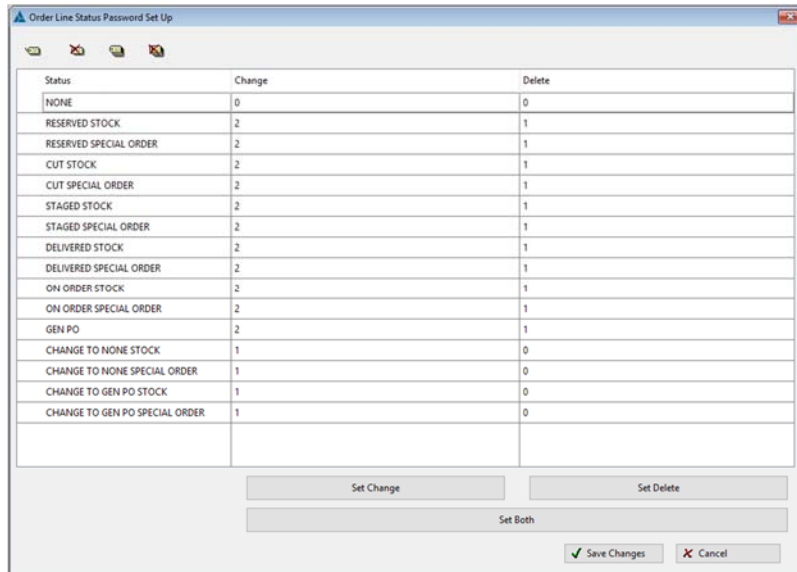
System Options

Order Line Status Password Set Up

>[Utilities](#)>[System Options](#)>[Order Entry](#)>[Order Entry Category Authorization](#)

Type- Must be Global 

This system option allows passwords/roles to be set for changing lines with Stock and Special order good independently.



Status	Change	Delete
NONE	0	0
RESERVED STOCK	2	1
RESERVED SPECIAL ORDER	2	1
CUT STOCK	2	1
CUT SPECIAL ORDER	2	1
STAGED STOCK	2	1
STAGED SPECIAL ORDER	2	1
DELIVERED STOCK	2	1
DELIVERED SPECIAL ORDER	2	1
ON ORDER STOCK	2	1
ON ORDER SPECIAL ORDER	2	1
GEN PO	2	1
CHANGE TO NONE STOCK	1	0
CHANGE TO NONE SPECIAL ORDER	1	0
CHANGE TO GEN PO STOCK	1	0
CHANGE TO GEN PO SPECIAL ORDER	1	0

Figure Order Line Status Password Set Up screen



This system option does not apply to the adjust status button. It should be password protected separately.

1. Choose the line status(s) to set and tag it/them.
2. To set the password/role the same for both click the set both button.
3. The select password screen or select role screen will display.
4. Use the select button to apply.
5. To have a different level for change and delete, use only the change or delete button.

Change to...

CHANGE TO NONE STOCK
CHANGE TO NONE SPECIAL ORDER
CHANGE TO GEN PO STOCK
CHANGE TO GEN PO SPECIAL ORDER

If an Admin wants users to be able to fully change line status BUT restrict moving any line status to None/Gen PO, then they can set all the other Change levels to 0 and Delete levels to a non-zero value (to keep them from deleting lines) and then set the “change to” settings to a non-zero value.

This option allows users to set up the system so that a user can change Reserve to Cut as a part of the natural business flow, and change other information about lines, but cannot change Reserve to None/Gen PO.

On the setup screen the delete level will always be 0. This cannot be set.

Config Creator

Utilities>Set Up>Config Creator

A checkbox has been added that says “Exclude Group Subtotals”. When this box is checked and the user selects one of the Subtotal group options on the “Confirm Invoice Printing” window, all grouping still takes place but the group subtotal will be hidden.

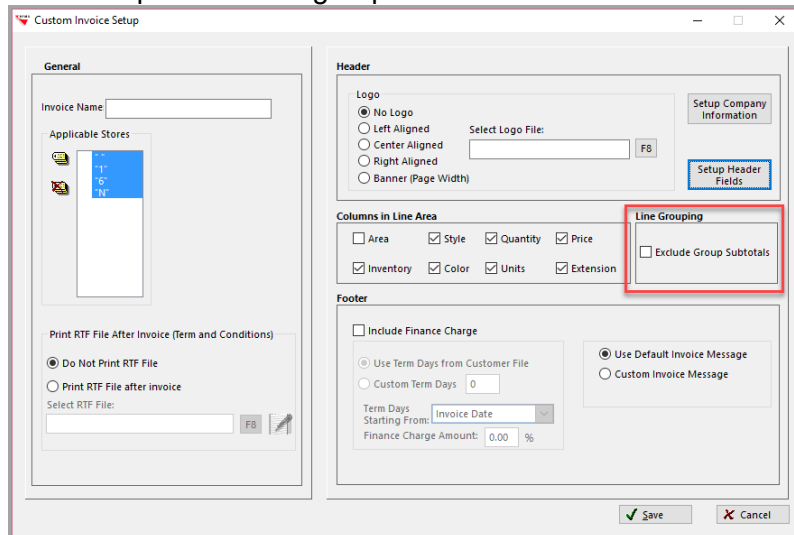


Figure Custom Invoice Setup screen

Customer Orders

Browse Screen

The Balance Due and Invoice Total columns can be sorted. Ctrl-S can also be used with these columns.

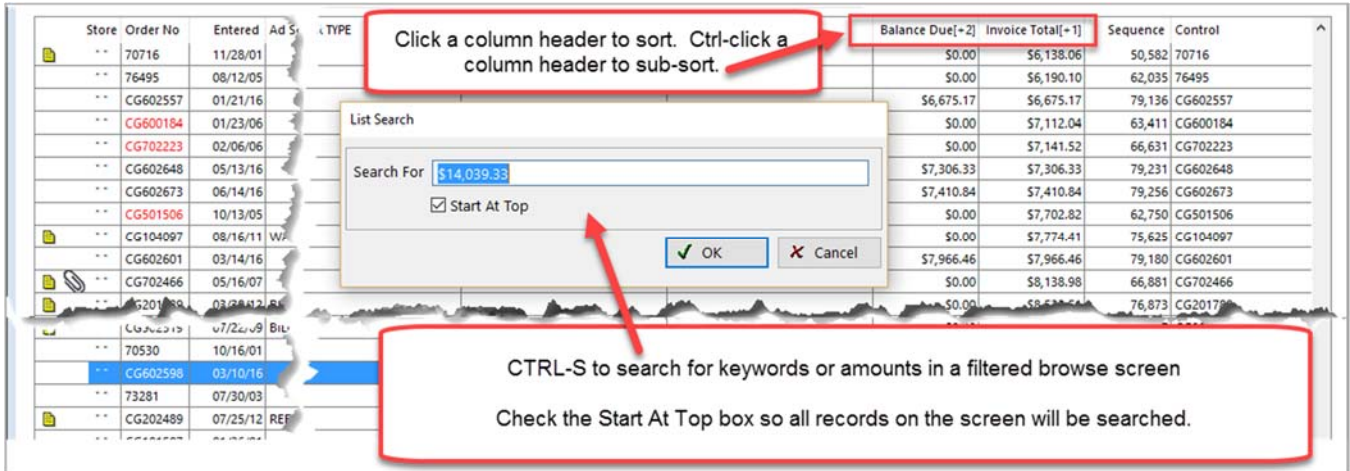


Figure Customer Orders Browse screen

Customer Orders and Quotes

On the Edit Customer Sold To and Ship To screen, a Clear Sold To & Ship To button and a Clear Ship To Only button has been added.

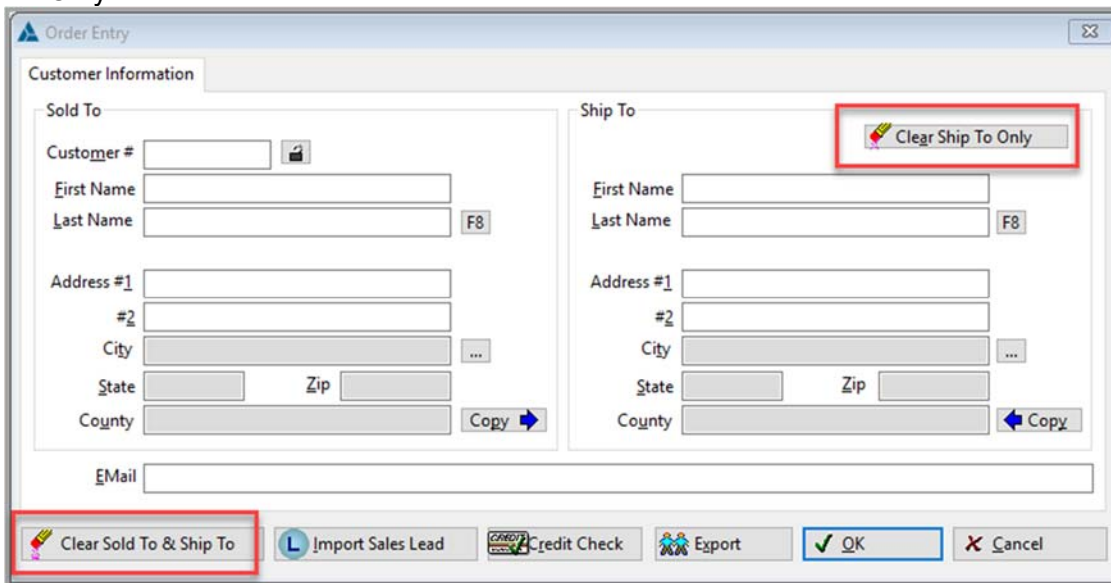


Figure Customer Information screen

Streamlining Customer Entry

If the user has “[Require Order Customer \(or Quote Customer\) to be in Customer File](#)” set to YES and the cursor is in the Sold To field which is empty, instead of the user hitting F8 to get to Customers, the Customer File screen will automatically open.

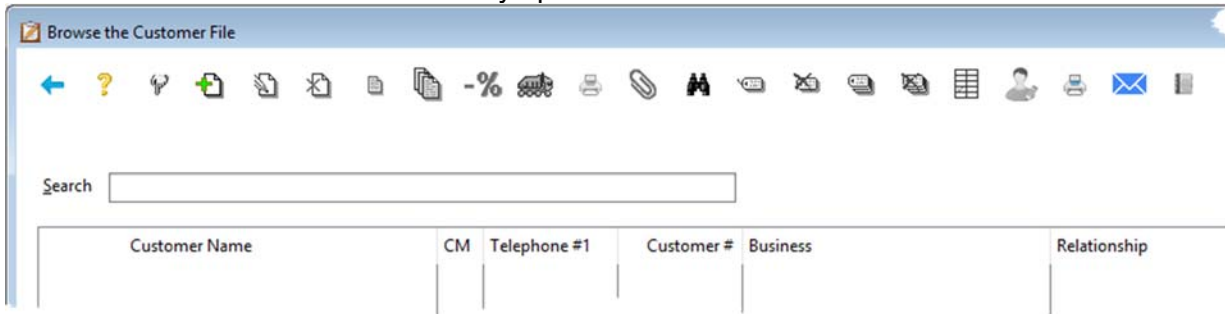


Figure Browse the Customer File screen

Products Browse

If the System Option [Display Item Vendor \(Supplier and/or Manufacturer\)](#) is set to neither, the Private supplier information will display in the Supplier field. Otherwise, the field will display according to the selection in the System Option.

Billing Groups

The Job Number (User Defined field), Telephone 2 and Ship To Name have been added to the browse screen. The Ship To Address has been added to the Order Details section. Also, the Telephone 1 has been removed from the Order Details section.

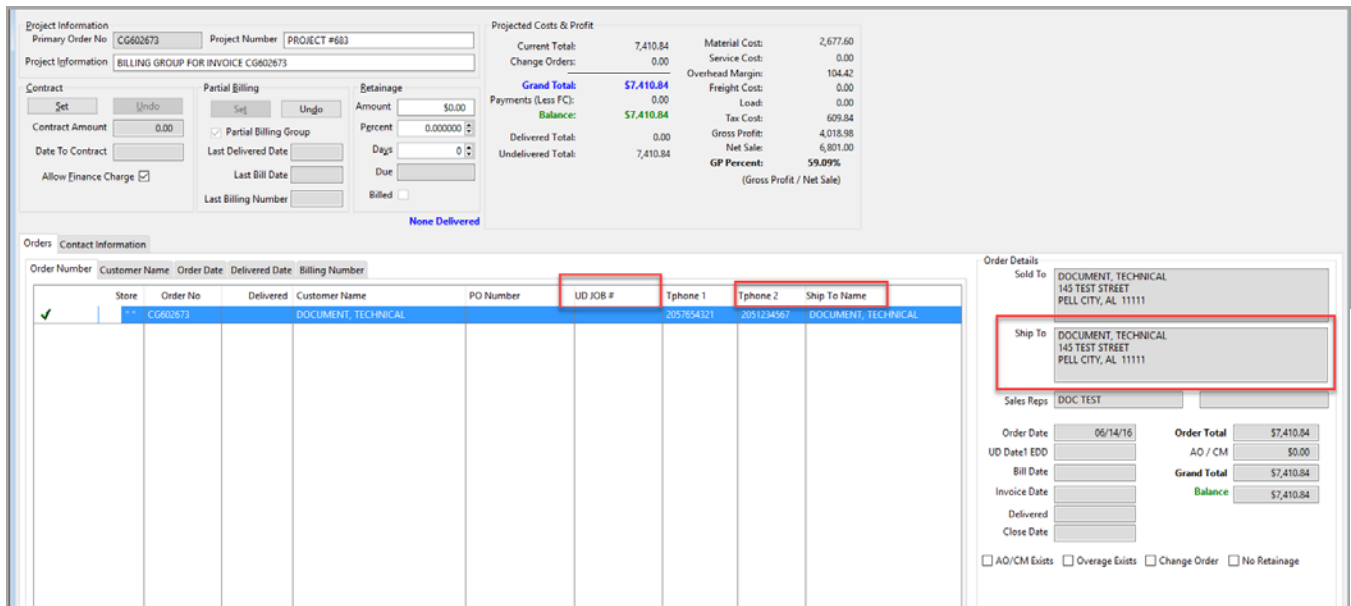


Figure Billing Group screen

AIA Billing Reports

The ability to select lines to create the AIA Billing report has been added. All Job Costed Order Lines or Select Order Lines are the choices.

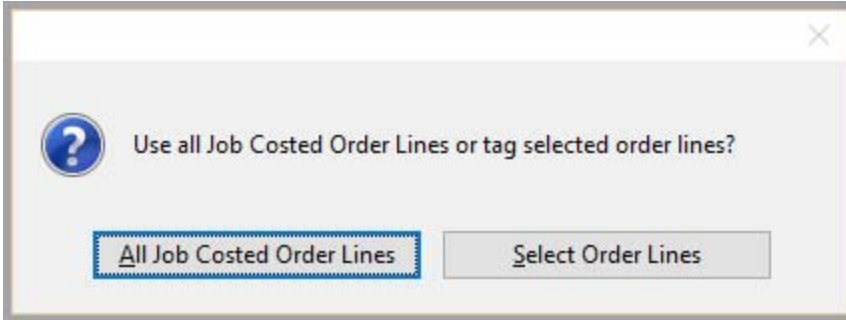


Figure AIA Line Choice

If All Job Costed Order Lines is selected, then the user can View, Save Only, or Save & Print.

Description of Work	Contract Value	Work Completed Previous (D-E)	Work Completed This Period	Materials Presently Stored (H-I)	Completed & Stored To Date (D-E-H)	% C/G	Balance To Forward
CARPET INSTALLATION	\$3.00	0.00	0.00	0.00	0.00	0.00%	0.00
CERAMIC	\$545.00	0.00	0.00	0.00	0.00	0.00%	0.00

Figure All Job Costed Lines

If Select Order Lines is chosen, then the user can tag lines to use.

Order #	Line #	Line Status	PC	PC Description	Description of Work	Previously Billed	Remaining To Bill	Current Billing	Order Line Total	Style/Item	Co
CG502153	1	Cut	06	CERAMIC	CERAMIC	0.00	1,881.60	1,881.60	1,881.60	BLOGGING	PA
CG502153	2	Cut	06	CERAMIC	CERAMIC	0.00	86.85	86.85	86.85	GROUT NON-SANDED 10	#4
CG502153	3	Delivered	06	CERAMIC	CERAMIC	0.00	597.50	597.50	597.50	FLOOR-TILE STRAIGHT	
CG602547	1	Reserved	01	CARPET	CARPET	0.00	1,800.00	1,800.00	1,800.00	CHAMPIONS	RQ
CG602547	2	Reserved	06	CERAMIC	CERAMIC	0.00	750.00	750.00	750.00	BLOGGING	CR
CG602547	4	Reserved	06	CERAMIC	CERAMIC	0.00	1,600.00	1,600.00	1,600.00	BLOGGING	PA
CG602578	1	Reserved	01	CARPET	CARPET	0.00	960.00	960.00	960.00	YELLOW BRICK ROAD 12	OZ
CG602578	2	None	81	CARPET INSTAL	CARPET INSTALLATION	0.00	82.80	82.80	82.80	CPT-(BASIC)-STRETCH/IN	
CG602716	1	None	06	CERAMIC	CERAMIC	0.00	128.70	128.70	128.70	GROUT NON-SANDED 10	#1
CG602717	1	None	06	CERAMIC	CERAMIC	0.00	0.00	0.00	0.00	GROUT NON-SANDED 10	#4

Figure Select Order Lines

The description of work field has been increased to 80 characters.

Copying Claim Numbers from the Browse Screen

If the Claims pulldown has a value (s), the displayed value can be copied to the clipboard and used to select the Claim in the Claims Browse Screen.

Copying can be done by right clicking in the Claims area and selecting "Copy Claim" on the right of the customer order browse screen.

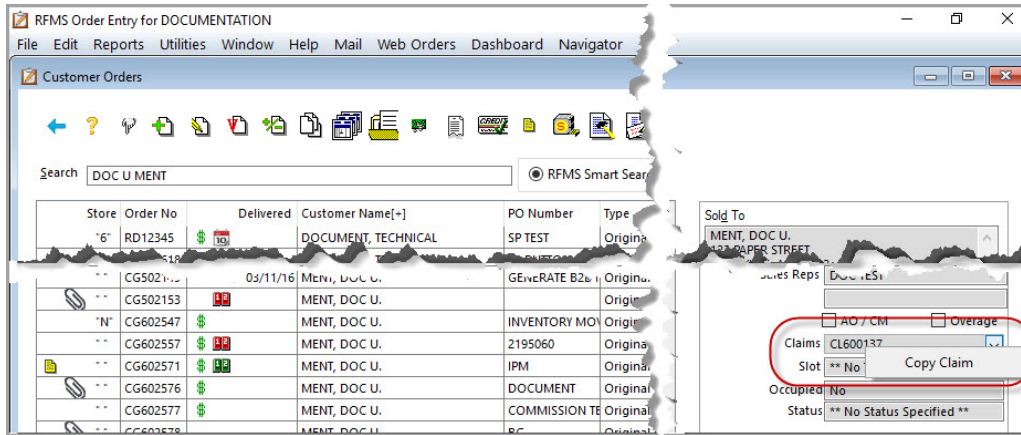


Figure Customer Order Browse Screen

It can also be done by moving the cursor to the Claims area on the right of the Customer Orders Browse Screen and hitting Ctrl-C.

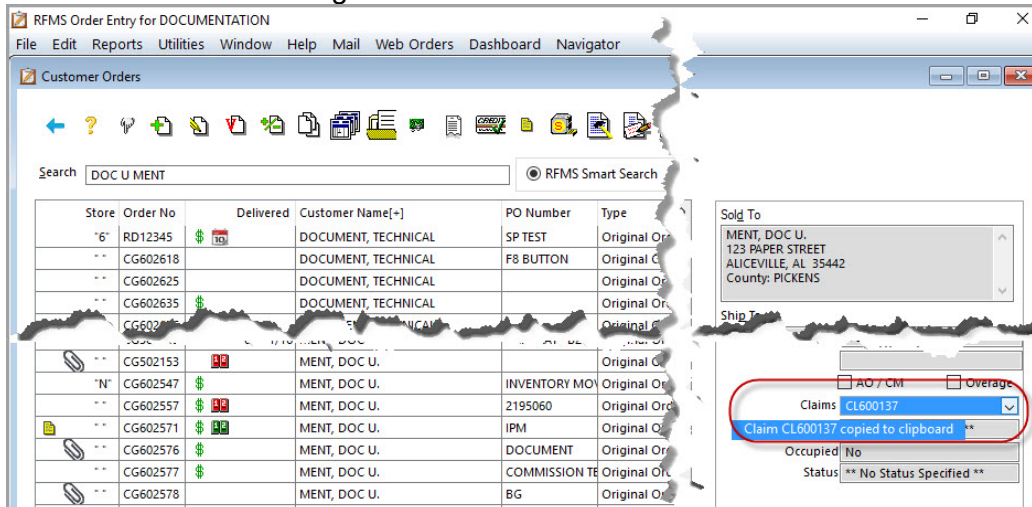


Figure Customer Orders Browse Screen

Simple Order Entry Find Screen

Private Collection has been added to the Products find screen for [Simple Order Entry](#).

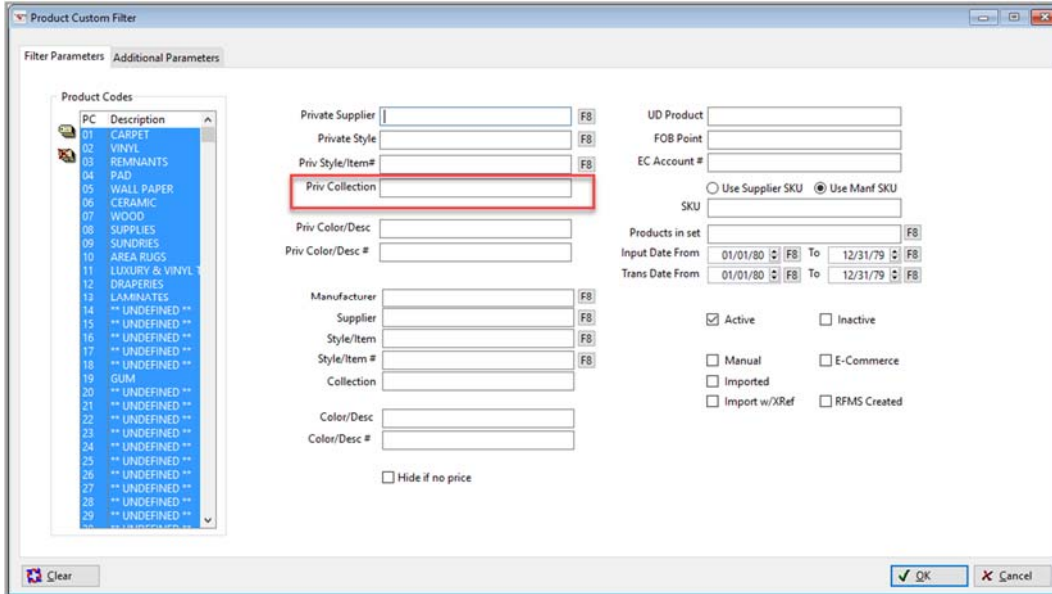


Figure Products Find Screen

Notes

If an order has an A/P record tied to it, then the related notes function will show the payable note in the All Notes and Remarks screen.

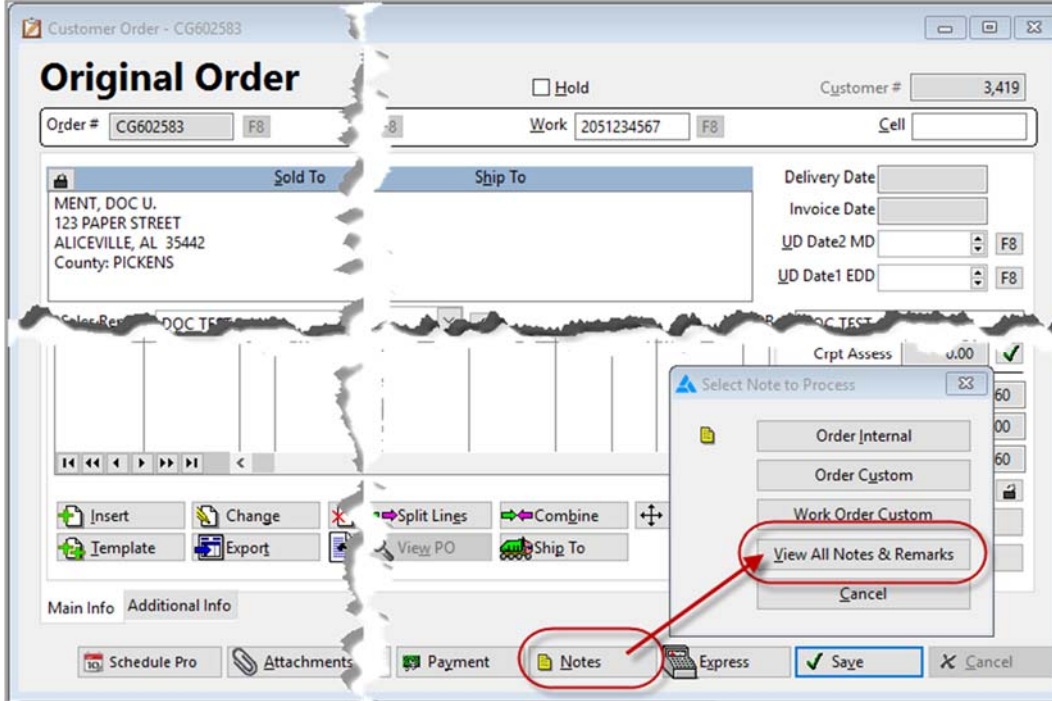


Figure Notes Options on Customer Order

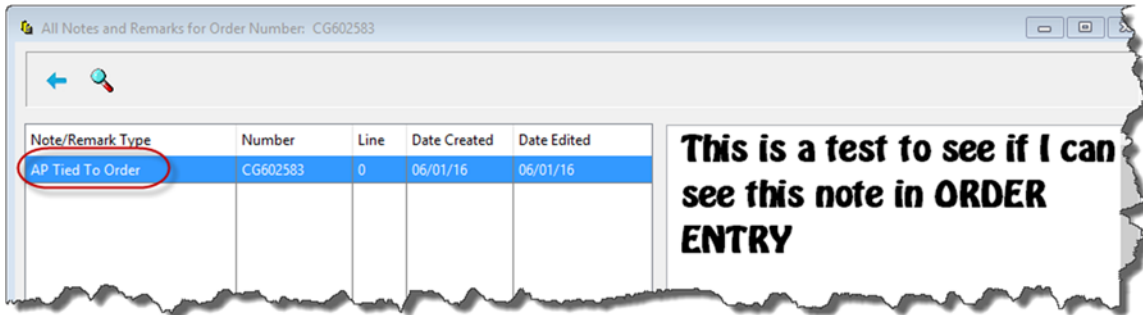


Figure All Notes and Remarks screen

Attachments

If an order has an A/P record tied to it, then the related attachments will show. The *Show Related Attachments* box must be checked.

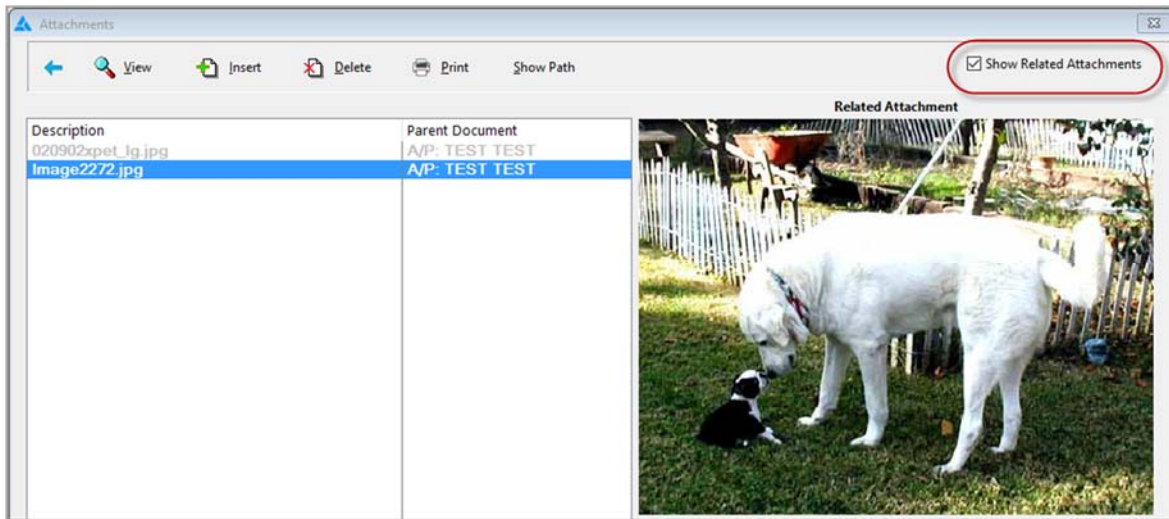


Figure Attachments Screen

Due Button

The due button will no longer allow the user to change the Customer Name from the name pointed to by the current order when due was pressed. The customer selected in the order browse is the only customer the Due Button will function against.

Picking Ticket

When printing the Picking Ticket, a user can choose to print the line weight and total weight. Click options

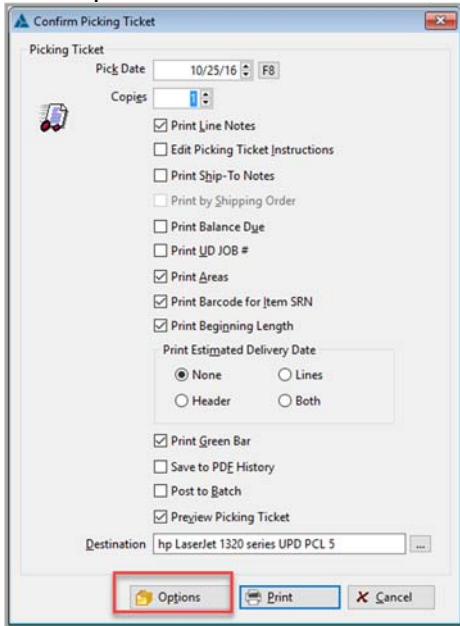


Figure Picking Ticket Print Screen

Check the boxes that need to print on the Picking Ticket. Click OK.

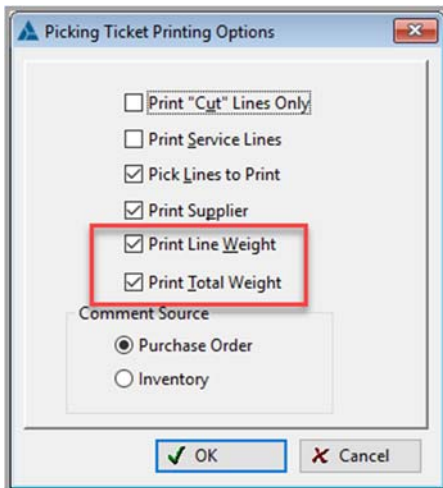


Figure Picking Ticket Printing Options

Page 1
10/25/16
12:15PM

Picking Ticket

DOCUMENTATION COMPANY


Invoice:
CG602775

Pick Date:
10/25/16

Sold To OZ, WIZARD 123 THRONE ROOM EMERALD CITY, OZ 123456	Ship To OZ, WIZARD 123 THRONE ROOM EMERALD CITY, OZ 123456
--	--

Customer Purchase Order: _____ Tphone 1 : 2051234567
 Sales Representative: DOC TEST
 Paid in Full: No

Prod Code	Roll/Item No.	Width	Beginning Amount	Amount Required	Ending Amount	Units	Status	Location	Store	Sign
*Line # 0001 BLOGGING/PATRIOT BLUE										
06	123456		50.00	10.00	40.00	EA	CUT		"1"	Supplier: TEST
										Cartons: 1.00
										Unit Ship Weight: 100.00 oz
										Line Total Ship Weight: 62.50 lb
Width x Length: 0'0"X0'0"										


 SRN: 45536

Total Shipping Weight: 62.50 lb

Figure Picking Ticket Preview

Delivery Ticket

The width and length of an item will now print on the Delivery Ticket if there is one listed on the record.

Page 1
10/25/16
12:48PM

Delivery Ticket

DOCUMENTATION COMPANY

For: 10/25/16

Sold To OZ, WIZARD 123 THRONE ROOM EMERALD CITY, OZ 123456	Ship To OZ, WIZARD 123 THRONE ROOM EMERALD CITY, OZ 123456	Invoice CG602775 OZ, WIZARD
--	--	---

Customer Purchase Order: _____ Tphone 1 : 2051234567
 Sales Representative: DOC TEST

Code	Roll/Item No.	Width	Amount	Units	Location	Store	Sign
*Line # 0001 BLOGGING/PATRIOT BLUE							
06	123456			10.00	EA		"1"
						Unit Ship Weight: 100.00 oz	Carton Qty: 4.17
						Line Total Ship Weight: 62.50 lb	Width x Length: 10'0"X10'0"
*Line # 0002 HORSE OF ANOTHER COLOR/TOTO BLACK							
01	CG6026730002	15'0"	25'0"	SY			" "
							Total Shipping Weight: 62.50 lb

Delivery Ticket Instructions _____

Figure Delivery Ticket Preview

Price Check

[Utilities>Price Check](#)

The OK button no longer has to be clicked before scanning the next roll or item.

Quotes

Find Screen

The ability to filter by Quotes with Samples Outstanding Only and Samples Due Date have been added.

The screenshot shows the 'Find Quotes' dialog box. It features several sections for data entry and filtering. On the left, there are fields for 'Quote Number', 'Sold To' (Name, Address 1, Address 2, City, State, Zip), 'Ship To' (Name, Address 1, Address 2, City, State, Zip), and various job and customer identifiers (UJ JOB #, PO Number, Customer Type, Sales Rep 1, Sales Rep 2, Work, Cell). Below these are dropdown menus for 'Export Options', 'Remark Type', 'Add Source', 'UJ ORDER TYPE', 'UJ CONTRACT TYPE', and 'UJ SERVICE'. At the bottom left are 'Clear', 'Save', and 'Load' buttons. On the right, there is a 'Stores' list. In the center-right, there are date range filters: 'Quote Date From' (01/01/80) To (12/31/79), 'UJ Date1 EDD' (01/01/80) To (12/31/79), 'UJ Date2 MD' (01/01/80) To (12/31/79), 'Export Date From' (01/01/80) To (12/31/79), and 'Sample Due Date From' (01/01/80) To (12/31/79). A checkbox labeled 'Quotes With Samples Outstanding Only' is checked. At the bottom right are 'OK' and 'Cancel' buttons.

Figure Quotes Find Screen

Customers

RFMS Smart Search

The RFMS Smart Search no longer includes prospects. To find prospects, use the binoculars.

Editing the Customer Record

When the System Option [Update Quote or BidPro Customer Information if Customer is Edited](#) is set to allow the Quotes and/or BidPro Estimates to be update, a notification message appears and a checkbox has been added to Allow Change to Ship-To. Now for example, when a Builder customer record is updated leaving the box unchecked prevents the ship to information on quotes or bids from being overwritten.

The screenshot shows a dialog box titled 'Update BidPro Estimates?'. It contains the text: 'Would you like to apply updates to all BidPro Estimates? The information that will be updated is the Sold To Address, Tphone 1 Phone, Salesperson(s) and Email.' Below this is a note: 'Note: Customer Sold To Name will always be automatically updated if the Customer Number matches.' At the bottom, there are two checkboxes: 'Allow Change to Ship-To' (which is unchecked and has a red arrow pointing to it) and 'Clear Salesperson 2'. To the right of these checkboxes are 'Yes' and 'No' buttons.

Figure Notification Message

Referring Member/Main

The select screen now shows Business Name and Telephone #1. The screen is also RFMS Smart Search enabled.

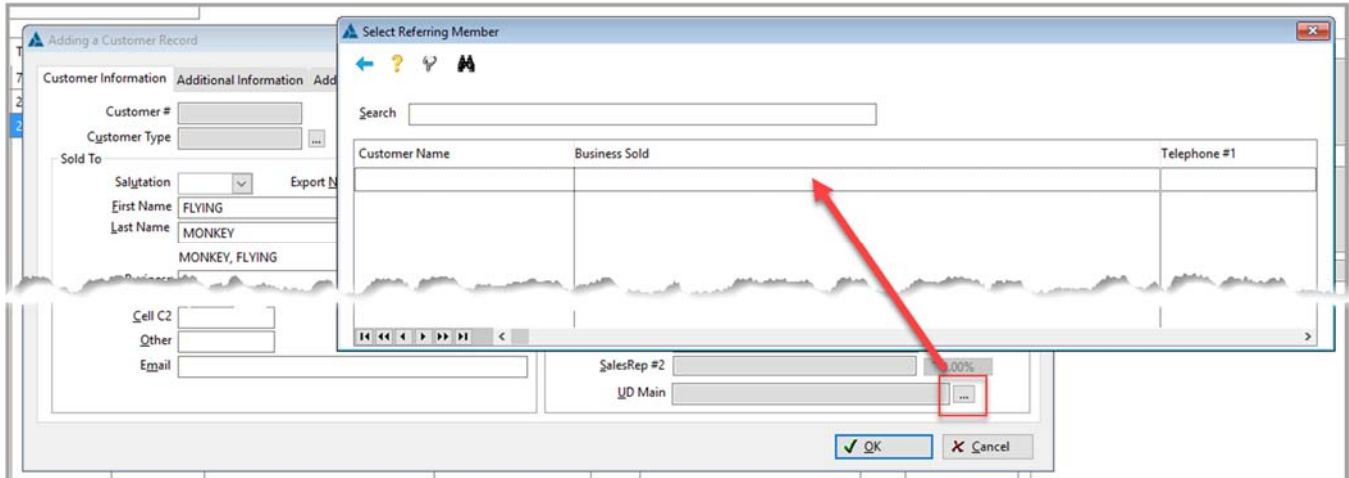


Figure Referring Member/Main

Customer List Report

The wording Store Type has been changed to Relationship Type. Relationship Types are picked up from the user defined values set for the relationships.

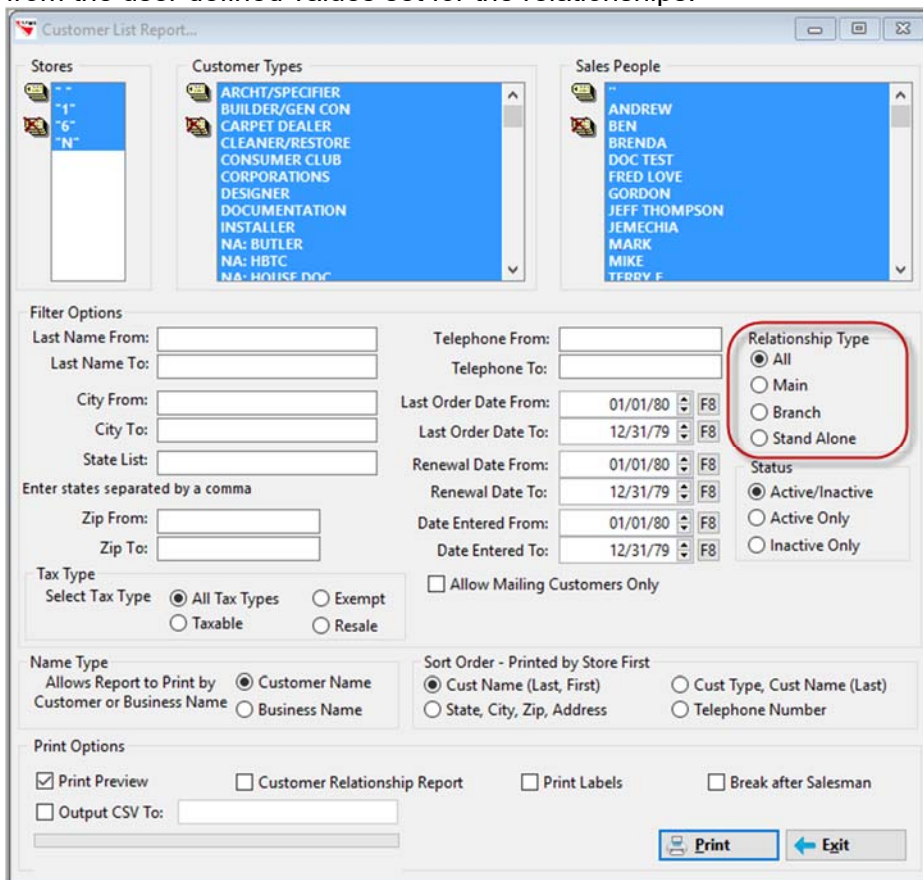


Figure Customer List Report Screen

The customer's relationship and active/inactive status has been added to the CSV.

Customer	Addr1	Addr2	City	State	Zip	Tphone 1	Tphone 2	Cell C1	Cell C2	Other	Expires	RelationS	Status
22345678	30 CHARACTERS	5678	ALABASTE	AL	35007-123	2.06E+09	2.05E+09	2.05E+08	5.56E+09		0140825	UD Branch	ACTIVE
A.R.C.	7735 OLD BIRMINGH		COTTOND	AL	35453	205-556-7686						UD Stdalo	ACTIVE
AARON, C	29 TERRIWOOD		TUSCALOC	AL	35401							UD Stdalo	ACTIVE
ADVANTA	1641 N. MCFARLAND		TUSCALOC	AL	35406	2.05E+09	205-345-3	205-758-1831				UD Stdalo	ACTIVE
AMASON	1820 RICE MINE RD.		TUSCALOC	AL	35406	205-345-9626		205-345-9686				UD Stdalo	ACTIVE
AMERICA	P.O. BOX 2213		TUSCALOC	AL	35403	205-758-2163						UD Stdalo	ACTIVE
ANDERSO	WILLOW T 2800 MCF		TUSCALOC	AL	35405	205-556-2800						UD Main	ACTIVE
APLIN, GORDON			TUSCALOC	AL	35405	205-554-1	205-792-4292					UD Stdalo	ACTIVE

Figure Customer List Report CSV

Batch Edit Salesperson



Edit > Batch Edit Salesperson or

The ability to tag multiple customers and change the salesperson has been added.

- Tag the Customers that needed to be edited.
- Click the Batch Edit Salesperson icon or choose from the Edit menu.
- Select the new Salesperson from the drop-down menu and click OK.
- A message will appear letting the user know that the change has been made.

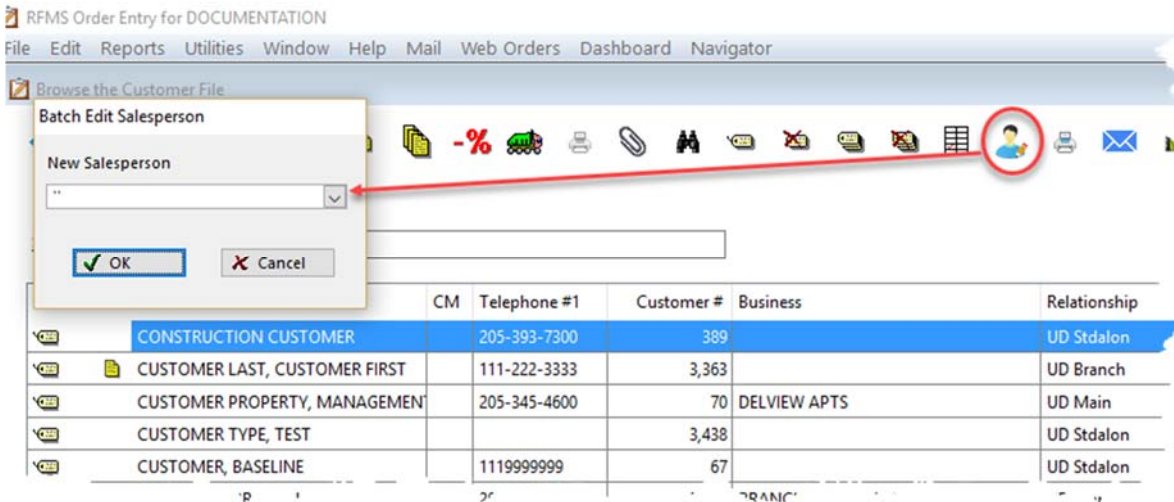


Figure Batch Edit Salesperson screen

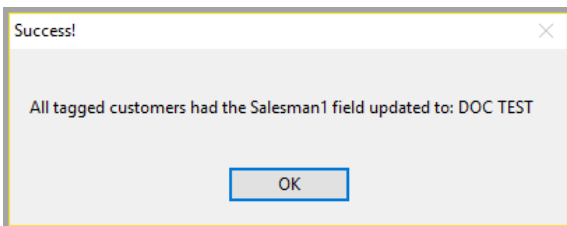


Figure Message screen

Products from Order Entry

Find Screen

The Manufacturer has been added to the Find Screen.

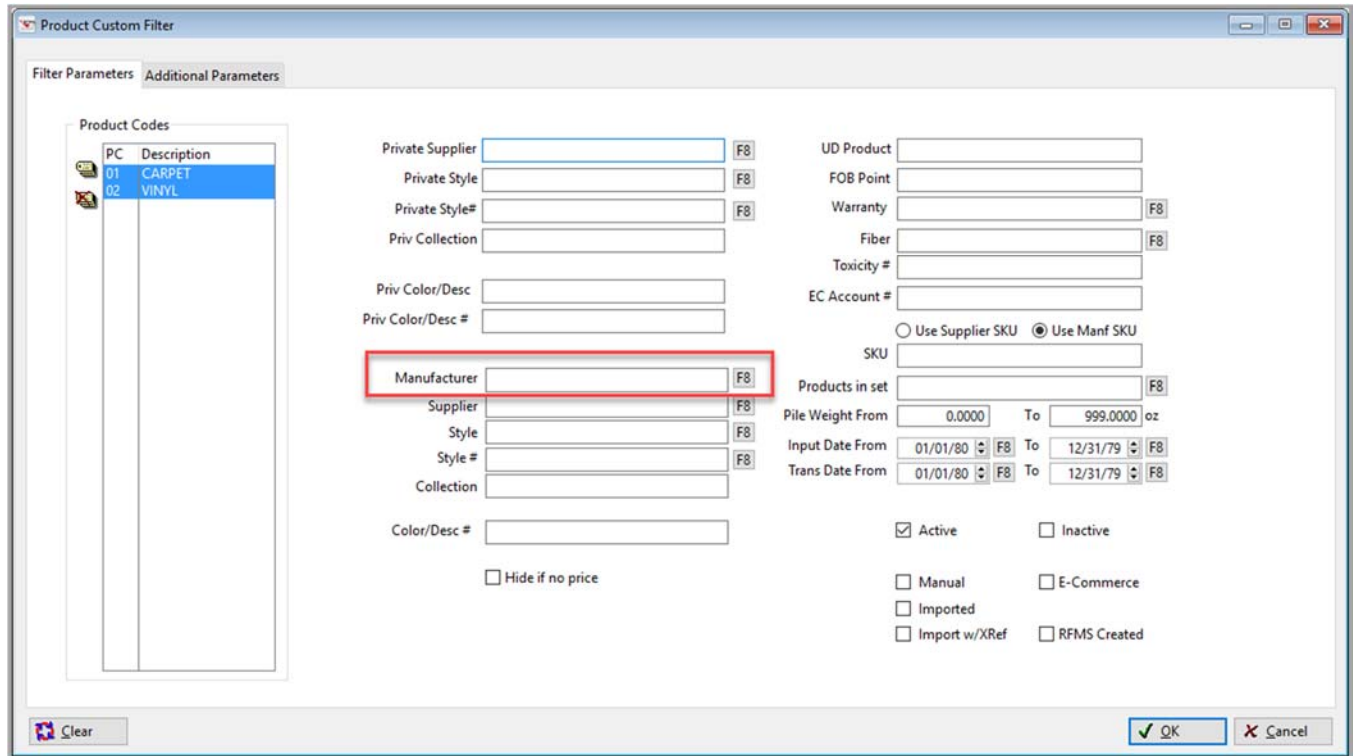


Figure Product Find screen

To Be Determined

At times a quote needs to be entered, but a final color selection has not been made. To keep from choosing a color which could be accidentally processed, To Be Determined has been added to each product record in Order Entry. This To Be Determined record is like a phantom record, it is not in products. It can only be seen in Order Entry when assigning lines.

It works the following ways.

- When selecting a product for a line on an order or quote have one of the colors be "TO BE DETERMINED". This will show for ALL rolls and Items and NOT services. "TO BE DETERMINED" will show in the list of colors as the LAST color.
- ORDER ENTRY Add/Edit Line. Show "TO BE DETERMINED" as the color if a user selects it from products.
- PO: PO cannot be created for "TO BE DETERMINED" colors.
- If the Order Line has a Color "TO BE DETERMINED" When the press the PO Truck they will receive a message "Generate PO Lines must have a Color / Description". They will have to edit the line and add a color before they will be allowed to Gen PO

Associated Product Bundle

Utilities>Associated Product Bundle

Material and Service Select Screen

The RFMS Smart Search screen and updated Find screens have been added to the Associated Product Bundle Feature for Materials and Services.

The screenshot shows a software window titled "Selected Products" with a sub-header "Tag Colors to Add as Associated Product Masters". It features a search bar, a table with columns for Tag, P, Category, Private Style/Name, Priv Color/Desc, Private Style/Itc Supplier, Supplier Style/Name/Se, Units, Manufacturer, and Private Supplier. A checkbox labeled "Keep Tagged Displayed" is checked and highlighted with a red box. A red arrow points from the text below to this checkbox. Below the table are several input fields for Manufacturer, Priv Supplier, FOB Point, Collection, Entry Type, EC Acct Num, Units, Toxicity #, UD Product, Trans Date, Status, and Inactive Date. At the bottom right are "Import" and "Cancel" buttons.

Figure Associated Products Materials and Service screen

Keep Tagged Displayed has been added so that the user can keep records in the browse screen while they search for other products...

Bar Codes

Mapping UPC Codes to RFMS RCode

File>Bar Codes>Import/Export RFMS Barcodes

This is where if an item uses a UPC printed code on a product you would map the R Code used by the RFMS Item. For more information, click [here](#).

Dashboard

Progress Bar

A progress bar for retrieving data or performing calculations has been added to the bottom toolbar.

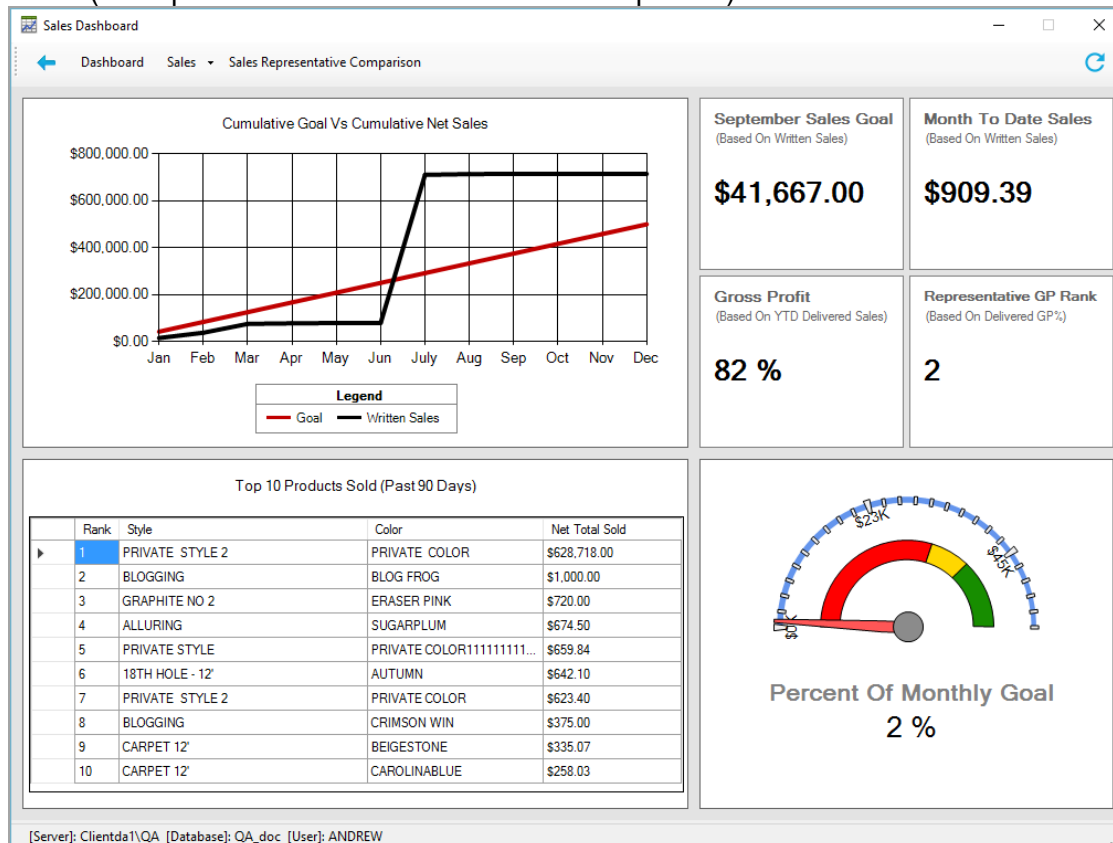
No Budget Message

A message will appear when opening the Dashboard if

- A Sales Budget is not set up
- The default Sales Budget is older than one year.
- The default Sales Budget starts at a later date.

Screen

The Sales Dashboard now shows database connection information and the Sales Representative's name (if the password is associated with a salesperson) in the bottom toolbar.



Net Sales (no taxes) will be used for all reporting on the Dashboard.

The sales dashboard now uses the default currency symbol associated with computer's locale.

Cumulative Goal vs Cumulative Net Sales

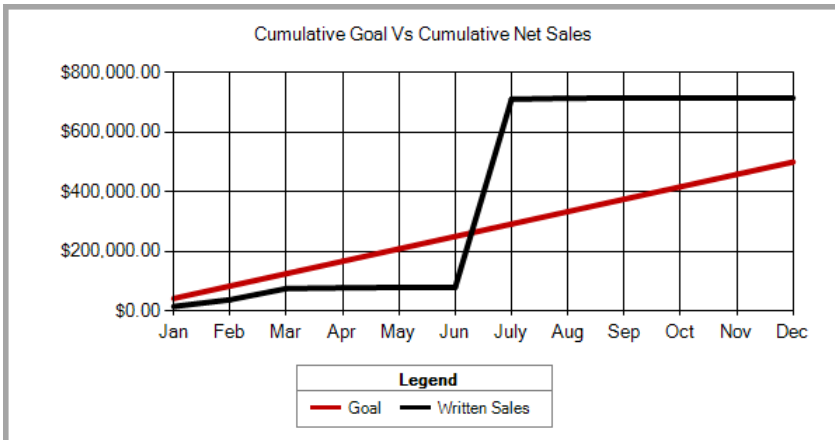


Figure Cumulative Goal vs Cumulative Net Sales

Cumulative Goal is the sum of each previous month’s goal.

Cumulative Net Sales is the sum of each previous month’s written net sales.

Top 10 Products Sold (Past 90 Days)

This grid shows the Sales Representative’s top 10 products sold over the last 90 days.

Rank	Style	Color	Net Total Sold
1	PRIVATE STYLE 2	PRIVATE COLOR	\$628,718.00
2	BLOGGING	BLOG FROG	\$1,000.00
3	GRAPHITE NO 2	ERASER PINK	\$720.00
4	ALLURING	SUGARPLUM	\$674.50
5	PRIVATE STYLE	PRIVATE COLOR1111111111...	\$660.40
6	18TH HOLE - 12'	AUTUMN	\$642.10
7	PRIVATE STYLE 2	PRIVATE COLOR	\$623.40
8	BLOGGING	CRIMSON WIN	\$375.00
9	PRIVATE STYLE	PRIVATE COLOR ATTACHM...	\$359.91
10	CARPET 12'	BEIGESTONE	\$335.07

Figure Top 10 Products Sold grid

<p>September Sales Goal (Based On Written Sales)</p> <p>\$41,667.00</p>	<p>Month To Date Sales (Based On Written Sales)</p> <p>\$909.39</p>
<p>Gross Profit (Based On YTD Delivered Sales)</p> <p>82 %</p>	<p>Representative GP Rank (Based On Delivered GP%)</p> <p>2</p>

Sales Goal

This box shows the sales goal for written sales for the month.

Gross Profit

This box shows the Sales Representative’s gross profit for the current fiscal year.



Notes:

If the system options *Display costs in order and inventory, also display GP% in orders* is set to no then the GP% will not show on the Dashboard.

Month To Date Sales

This box shows the Sales Representative’s month to date written net sales. Tax is not included.

Representative GP Rank

The Sales Representative’s rank is based upon their delivered gross profit percent. It does not display any other Sales Representative’s rank.

Percent of Monthly Goal

Gauge shows what percent of the monthly goal of written net sales has been met.

Sales

The Delivered Sales chart displays a Sales Representative's net delivered sales across the fiscal year.

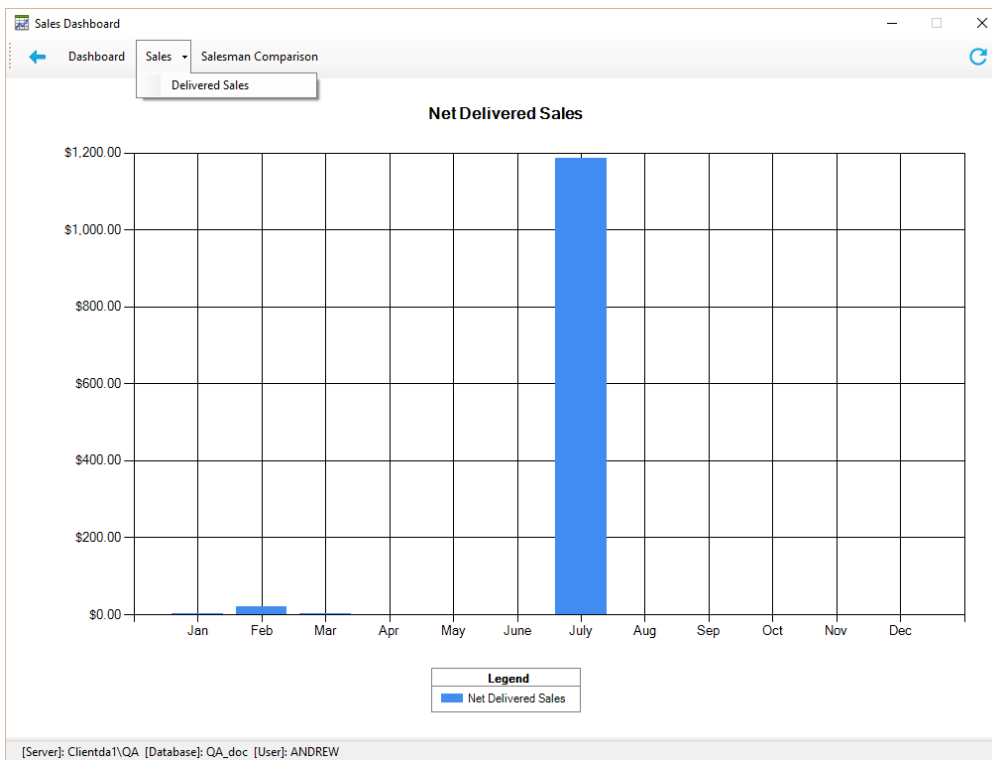


Figure Delivered Sales Graph

Sales Representative Comparison

Sales Representatives can compare sales information against other sales representatives only if they have the [password rights](#). Date ranges are Current Month, Current Quarter, and Current Fiscal Year.

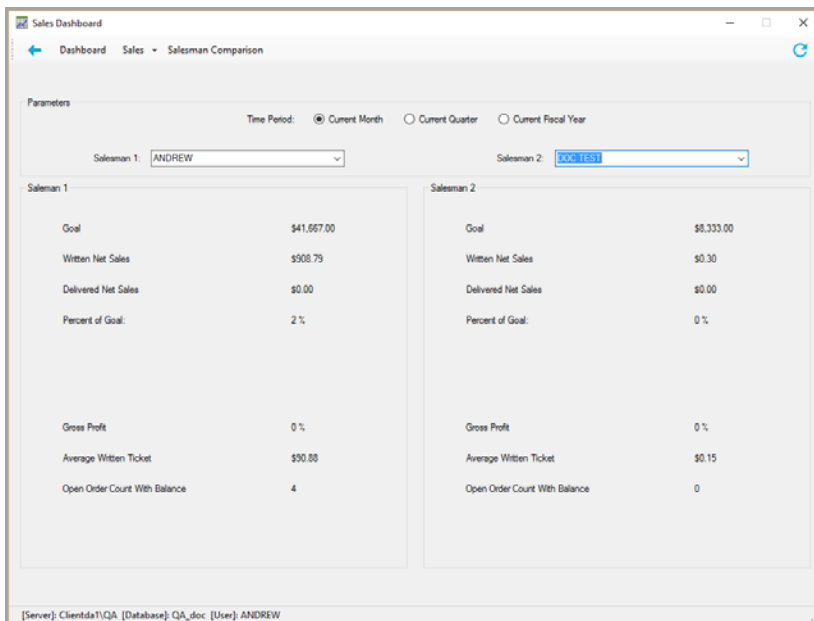
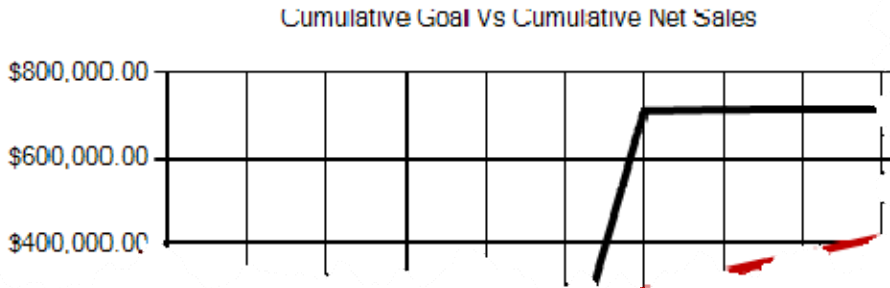
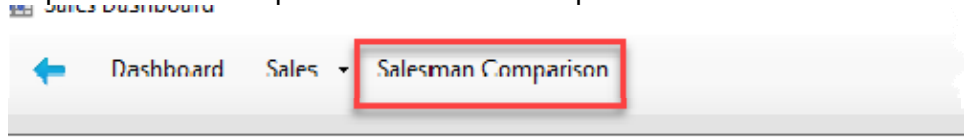


Figure Sales Representative Comparison screen

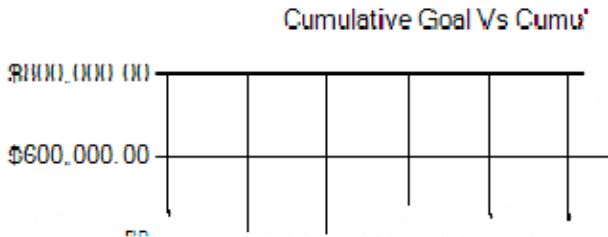
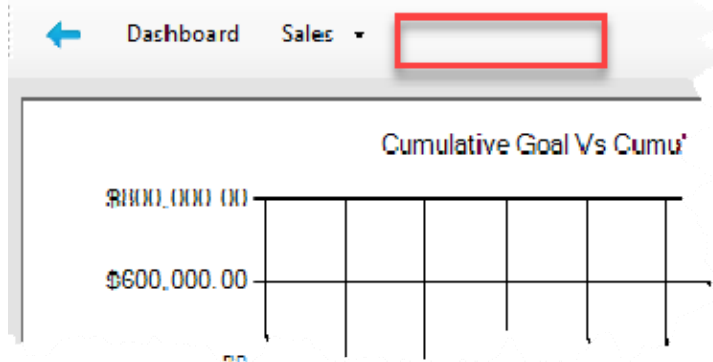
Password Rights

The ability to only view self or other salespeople is retrieved from the View Level that is tied to their password.

If the View Level is set to View All, the Sales Representative should be able to see the Sales Representative Comparison button at the top of the Dashboard.



If the View Level is set to Limit to any other value, the Sales Representative will not be able to see the button at the top of the Dashboard.



Inventory

Assign Inventory

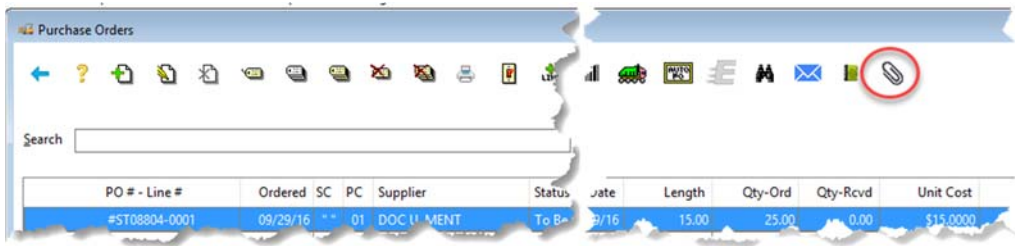
A Hot Key of Alt A has been added for Assign Inventory (Version 17.0.1)

Purge Inventory

Uncosted Inventory will no longer be included in a purge.

Purchase Orders

The ability to add attachments to Purchase Orders has been added.



The Estimated Delivery Date for the Order Line has been added to the Auto PO Generation screen. The column is called "Line Del Date"

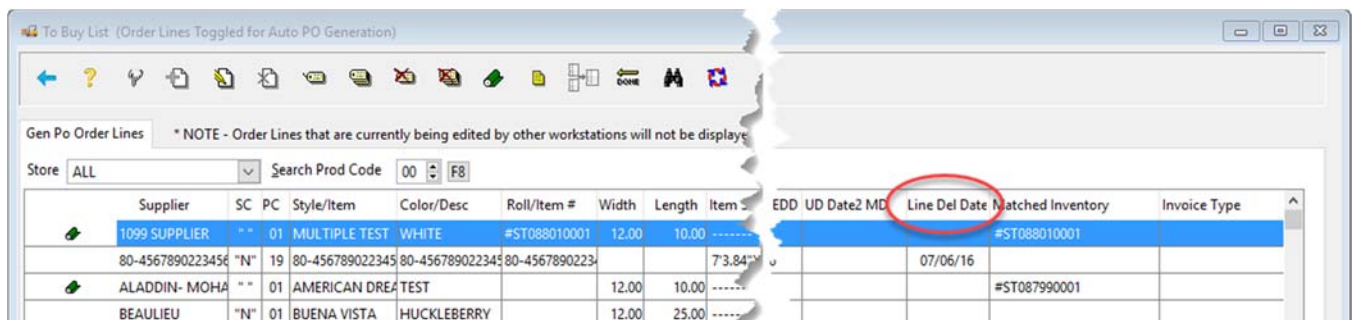


Figure Auto Po screen

If the [Insert Color](#) system option is set to yes, then ability to add a new color to Products from a Purchase Order is enabled.

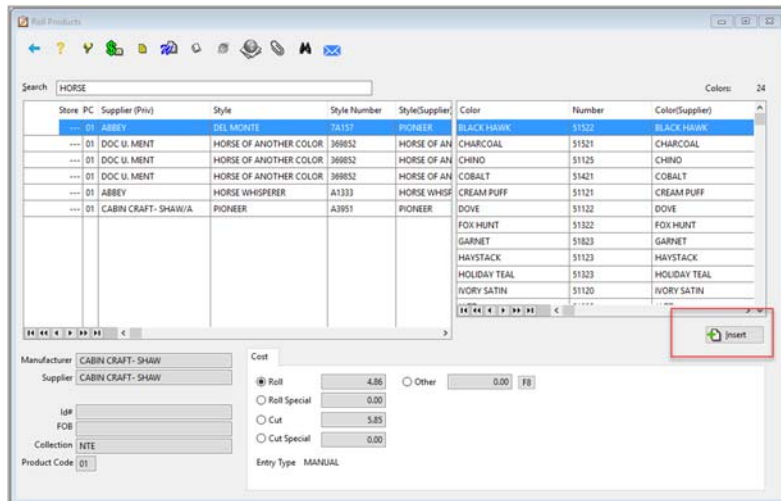


Figure Roll Products screen from Purchase Orders

Printing

Unit Ship Weight, PO Line Total Ship Weight and Total Ship Weight (of all lines) is now printed on the Standard Purchase Order.

Order Date		Product Code	Item Number	Style / Item Color / Description	Roll/Cut	Amount Ordered	Units	Quoted Unit Price	Promise Date
08/17/15		01	-----	SUPPLIER STYLE	Cut	1.33	SY		08/17/15
		PO #: CG502077-0001		PRIVATE COLOR	Width:	12.00			
				Style #: SUPPLIER STYLE Color#: PRIVATE COLOR #	Length:	1.00			
Taken By: D							PO Req Del Date: 08/17/15		
SideMark: CG502077		Comments:					PO Req Ship Date: 08/17/15		

Unit Ship Weight:	8 oz	PO Line Total Ship Weight:	10.64 oz
Total Shipping Weight:		10.64 oz	

Figure Purchase Order Preview

Receiving/Costing

Enter without PO

The option to use the Find Screen and the RFMS Smart Search have been added to the Roll Products import screen.

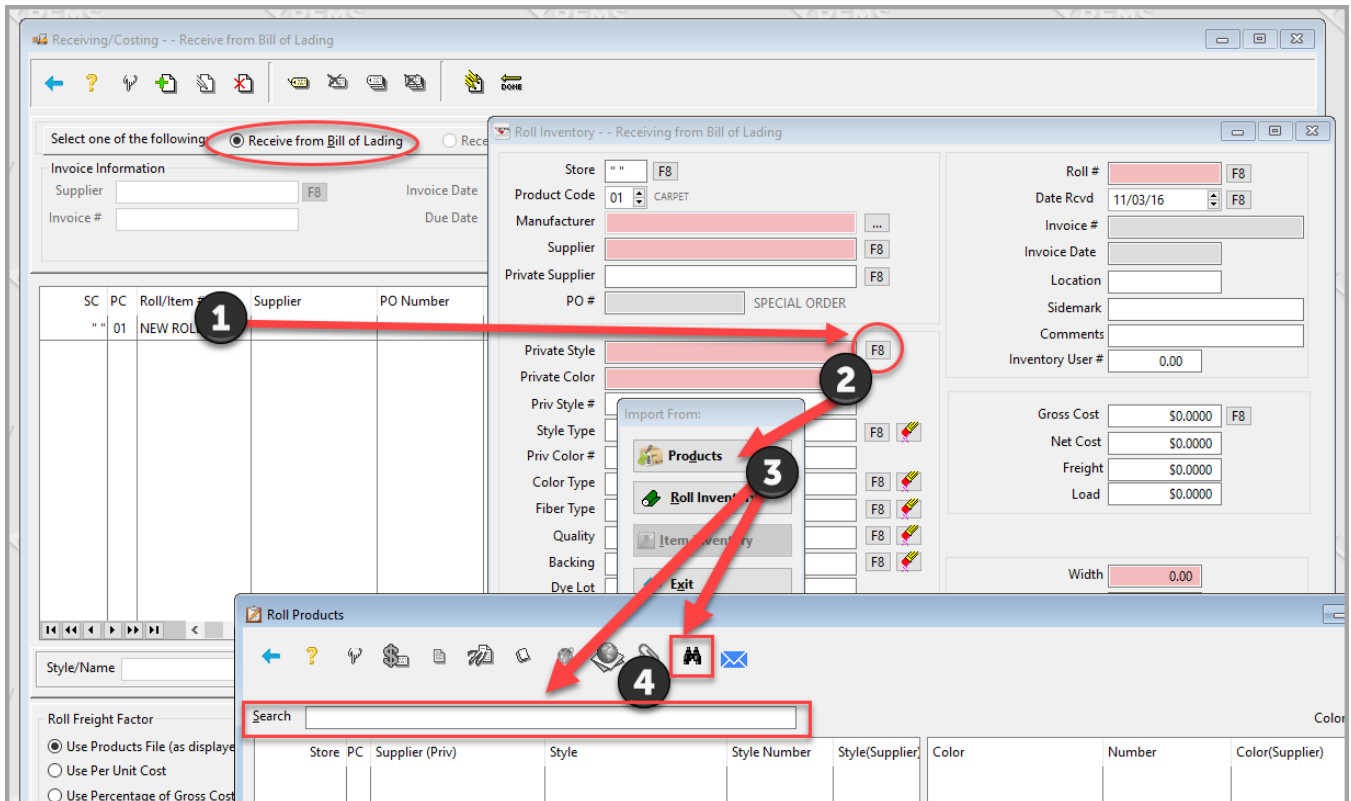


Figure Roll Products screen

1. Add a line to a the roll
2. F8 at Private Style.
3. From the Import From screen, click Products.
4. The RFMS Smart Search and Find screen are now available on the Roll Products screen

Not Costed Rolls/Items

The option to use the RFMS Smart Search and Find Screen has been added to the Not Costed Rolls/Items screen in Receiving/Costing.

SC	PC	Roll #	Supplier	Private Supplier	PO #	Style	Color	Style #	Color #
"N"	01	12046	SHAW INDUSTRIES, IN	CARPET ONE	#ST086660001	18TH HOLE - 12'	AUTUMN	35422	538428
" "	01	CG5020570004	SHAW INDUSTRIES, IN	CARPET ONE	CG5020570004	18TH HOLE - 12'	AUTUMN	35422	538428
" "	01	CG5021090001	SHAW INDUSTRIES, IN	CARPET ONE	CG5021090001	18TH HOLE - 12'	AUTUMN	35422	538428
"6"	01	123	SHAW INDUSTRIES, IN	CARPET ONE	CG3025870001	18TH HOLE - 12'	FALLING RAIN	35422	538426
"6"	01	1234	SHAW INDUSTRIES, IN	CARPET ONE	CG3025870001	18TH HOLE - 12'	FALLING RAIN	35422	538426
" "	01	194929	SHAW INDUSTRIES, IN	CARPET ONE	#ST085660001	18TH HOLE - 12'	FALLING RAIN	35422	538426
"6"	01	CG3	SHAW INDUSTRIES, IN	CARPET ONE	CG3025870001	18TH HOLE - 12'	FALLING RAIN	35422	538426
"1"	01	CG4010330001	SHAW INDUSTRIES, IN	SHAW INDUSTRIES, IN	CG4010330001	18TH HOLE - 12'	FALLING RAIN	DEMO ROLL	
" "	01	DEMO ROLL	SHAW INDUSTRIES, IN	CARPET ONE	CG3025870001	18TH HOLE - 12'	FALLING RAIN	35422	538426
"1"	01	CG3025710007	SHAW INDUSTRIES, IN	CARPET ONE	CG3025710007	18TH HOLE - INV - 12'	AUTUMN	35422	538428
"1"	01	CG4010640001	SHAW INDUSTRIES, IN	CARPET ONE	CG4010640001	18TH HOLE - INV - 12'	AUTUMN	35422	538428
" "	01	CG5020560001	SHAW INDUSTRIES, IN	CARPET ONE	CG5020560001	18TH HOLE - INV - 12'	AUTUMN	35422	538428
"1"	01	CG3026170001	SHAW INDUSTRIES, IN	CARPET ONE	CG3026170001	18TH HOLE - INV - 12'	DILLY DALLY	35422	538430
"1"	01	CG3025950001	SHAW INDUSTRIES, IN	CARPET ONE	CG3025950001	18TH HOLE - INV - 12'	FRONT NINE	35422	538421
"1"	01	CG4009600001	SHAW INDUSTRIES, IN	CARPET ONE	CG4009600001	42283 DETAIL	KHAKI	ST199	00125
"1"	01	CG4010720001	SHAW INDUSTRIES, IN	SHAW INDUSTRIES, IN	CG4010720001	5000	PRESSURE SENSIT		
"1"	02	CG4009600002	THE R.A. SIEGEL COMP	CARPET ONE	CG4009600002	ABERDEEN AXIS 12 FT	CARSWELL CLOVE / AX0	MANAX1	AX021
"1"	02	CG66	THE R.A. SIEGEL COMP	CARPET ONE	#ST086630001	ABERDEEN AXIS 12 FT	CARSWELL CLOVE / AX0	MANAX1	AX021
"1"	02	CG68	THE R.A. SIEGEL COMP	CARPET ONE	#ST086650001	ABERDEEN AXIS 12 FT	CARSWELL CLOVE / AX0	MANAX1	AX021

Figure Not Costed Rolls screen

If a record that is being costed is tied to an order that has been job costed and the freight is different, then a warning message will appear that states the job must be un-job costed to pick up the new charges.

In the **Inventory Consolidation** screen, the ability to tag using the mouse in the far left column has been added.

If the Order Line has areas and less then ordered is received, an imbalance will occur. The system now inserts an offsetting Work Order line to keep the areas in balance; therefore preventing Work Order lines from having to be regenerated.

Rolls and Items

Records can now be edited by using the Enter key in addition to double clicking or using the edit button. The type of Purchase Order is now listed on the Inventory record beside the PO#.

The screenshot shows a software window titled "Changing - Roll# CG6026480001 (Received from Invoice)". The window is divided into several sections:

- Product Information:** Store (F8), Product Code (01 CARPET), Manufacturer (TEST), Supplier (DOC U. MENT), Private Supplier (DOC U. MENT), PO # (CG6026480001) with a dropdown menu set to "SPECIAL ORDER".
- Private Style/Color:** Private Style (ISLAND FUN), Private Color (LAVA ROCK), and various other style and color selection fields.
- Financials:** Gross Cost (\$100.0000), Net Cost (\$100.0000), Freight (\$0.0000), Load (\$0.0000).
- Dimensions and Inventory:** Width (15.00), Beg Length (10.00), Used (10.00), Reserved (0.00), Available (0.00).
- Unit Price and Value:** Unit Price (\$250.00) and Initial Value (\$1,666.67).

Buttons for "OK" and "Cancel" are located at the bottom right of the window.

Figure Edit Roll Inventory Screen

Private Collection is now available on the filter in Rolls and Items.

The screenshot shows the 'FIND INVENTORY' window. On the left, there are two tree views: 'Stores' and 'PC'. The 'PC' view is expanded to show a list of items: 01 CARPET and 02 VINYL. The main area contains various filter fields: Manufacturer, Supplier, Style/Name, Color/Desc, Roll/Item Number, Lot Info, Width, PQ#, Sidemark, Location, Date Rcvd From (01/01/80), Date Rcvd To (12/31/79), Qty Avail From (0.00), Qty Avail To (99,999.00), Gross Cost From (0.0000), and Gross Cost To (99,999.0000). On the right, there are fields for Collection, Private Collection (highlighted with a red box), Color/Desc Number, Invoice Number, Id#, and Fiber. Below these are checkboxes for 'Show Uncosted Inventory Only', 'Show Costed Inventory Only', and 'Show Zero Available Inventory' (checked). At the bottom, there are 'Clear', 'OK', and 'Cancel' buttons.

Figure Inventory Find Screen

In the Items Find screen, the Item System Reference number has been added.

The screenshot shows the 'FIND INVENTORY' window. On the left, there are two tree views: 'Stores' and 'PC'. The 'PC' view is expanded to show a list of items: 03 REMNANTS, 04 PAD, 05 WALL PAPER, 06 CERAMIC, 07 WOOD, 08 SUPPLIES, 09 SUNDRIES, 10 AREA RUGS, 11 LUXURY & VINYL TILE, 12 DRAPERIES, 13 LAMINATES, 14 ** UNDEFINED **, 15 ** UNDEFINED **, 16 ** UNDEFINED **, 17 ** UNDEFINED **, 18 ** UNDEFINED **, 19 GUM, 20 ** UNDEFINED **, 21 ** UNDEFINED **, 22 ** UNDEFINED **, 23 ** UNDEFINED **, 24 ** UNDEFINED **, 25 ** UNDEFINED **, 26 ** UNDEFINED **, 27 ** UNDEFINED **, and 28 ** UNDEFINED **. The main area contains various filter fields: Manufacturer, Supplier, Style/Name, Color/Desc, Roll/Item Number, Lot Info, Width, Legth, PQ#, Sidemark, Location, RFMS Barcode, Date Rcvd From (01/01/80), Date Rcvd To (12/31/79), Qty Avail From (0.00), Qty Avail To (99,999.00), Gross Cost From (0.0000), and Gross Cost To (99,999.0000). On the right, there are fields for Collection, Private Collection, Color/Desc Number, Invoice Number, Id#, Lading Number, Fiber, Origin, Price Code, and Construction. Below these are checkboxes for 'Show Uncosted Inventory Only', 'Show Costed Inventory Only', and 'Show Zero Available Inventory' (checked). At the bottom, there are 'Clear', 'OK', and 'Cancel' buttons. The 'System Ref Number' field is highlighted with a red box.

Figure Item Find Screen

Beginning Inventory, Return Found and Acquired/Merged

A message will now appear that reads “Cancelling will cause all records entered to not be saved” when exiting without processing in Enter Beginning Inventory, Return Found and Acquired/Merged.

Barcoded Inventory

Tricoder

The option to upload data directly from the Tricoder has been removed. This option has become obsolete due to many clients moving to cloud based servers.

RFMS Barcoded Items

File>Barcoded Inventory>RFMS Barcoded Items

For more information on this feature, click [here](#).

The screenshot shows the 'Reconcile Item Inventory' window. At the top, there is a search bar and a 'Qty. Status:' label. Below this is a table with columns: Barcode, PC, Item #, Name, Desc, Run Lot, RFMS, Scanned. To the right of the table are checkboxes for 'Show All', 'Show Not Found', 'Show Qty Exception', 'Show Extra', and 'Show Qty Reconciled'. Below the table, it shows 'Scanned Difference: 0.000' and 'Adjusted Difference: 0.000'. At the bottom, there are two buttons: 'Apply All' and 'Reconcile'. On the right side, there is a section for 'Imported Data' with a table with columns: Barcode, Location, Qty. A green arrow points from the 'Imported Data' table back to the main table.

This new feature is an alternate method of reconciling physical item inventory and locations. It utilizes the RFMS Barcode (called R barcode), which gives the same “R” barcode number to inventory records that match on PC, Item #, Name, Description, and RunLot. It can also be used with Item Barcodes (I barcode records)

- The top browse shows the master RFMS Barcode record.
- The Bottom Left Browse shows the actual inventory records that make it up.
- The Bottom Right Browse shows imported record with that barcode.



Notes:

Tricoders purchased before Version 17.0 may have to be reprogramed to use this feature.

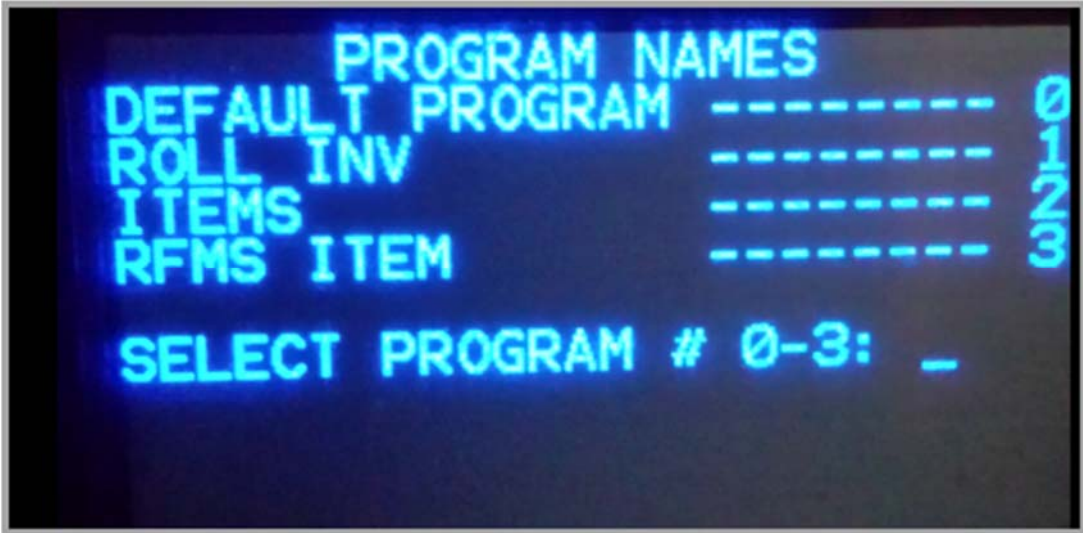


Figure Tricoder screen with new Feature

Truck

File>Truck

Weight Capacity has been added to the Truck screen.

- GVWR-Gross Vehicle Weight Rating
- GCWR-Gross combined Weight Rating
- GAWR-Gross Axle Weight Rating

Truck Number	2
Store	"1" F8
Year	1970
Make	FORD
Model	TEST
Description	WHAT AM I FOR
VIN #	
Plate Number	
Reg Exp Date	
Odometer Current	0
Odometer Next Service	0
Service Type Last	
Service Type Next	
Purchase Price	\$0.00
Purchase Date	
Odometer Purchase	0
Sold Price	\$0.00
Sold Date	
Odometer Sold	0
GVWR	0
GCWR	0
GAWR	0
GW UOM	

Figure Truck screen

Inventory Move

Receive Moved Inventory

The option to use the Find screen has been added to the Receive Moved Inventory screen.

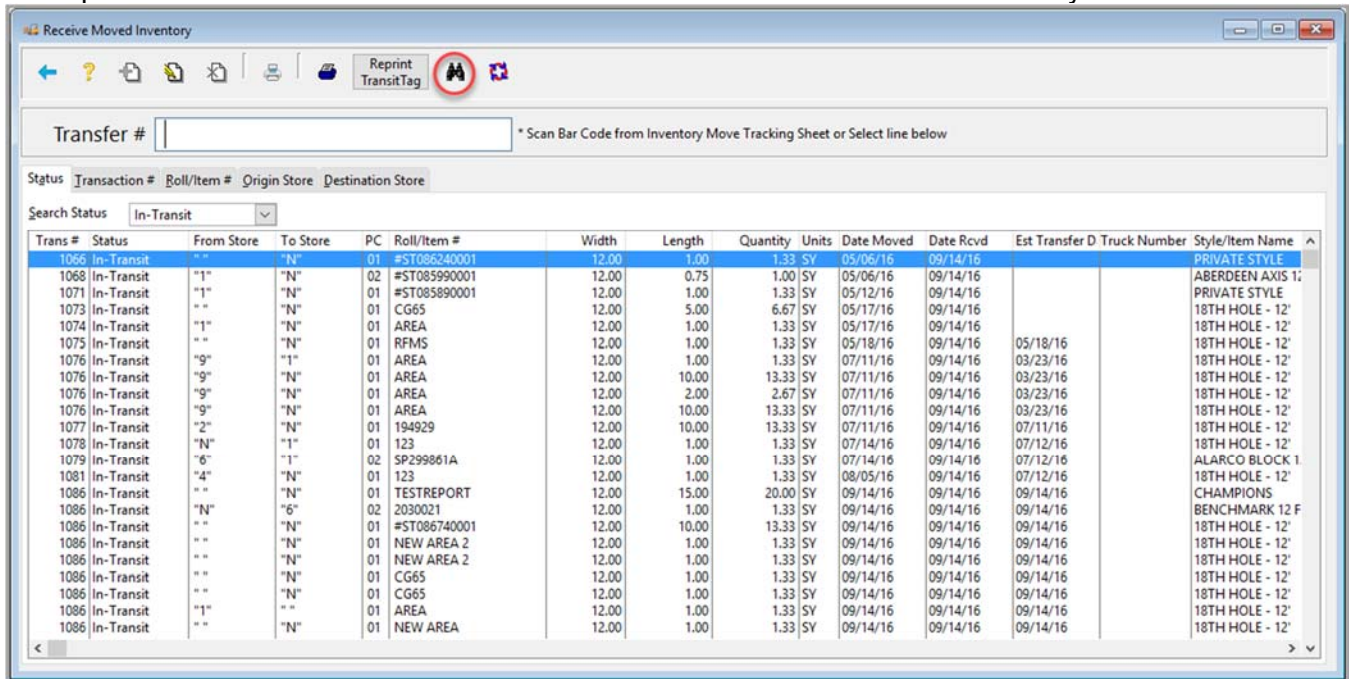


Figure Received Moved Inventory screen

The Invoice Number and the Line # have been added to the Received Moved Inventory screen if they exist.

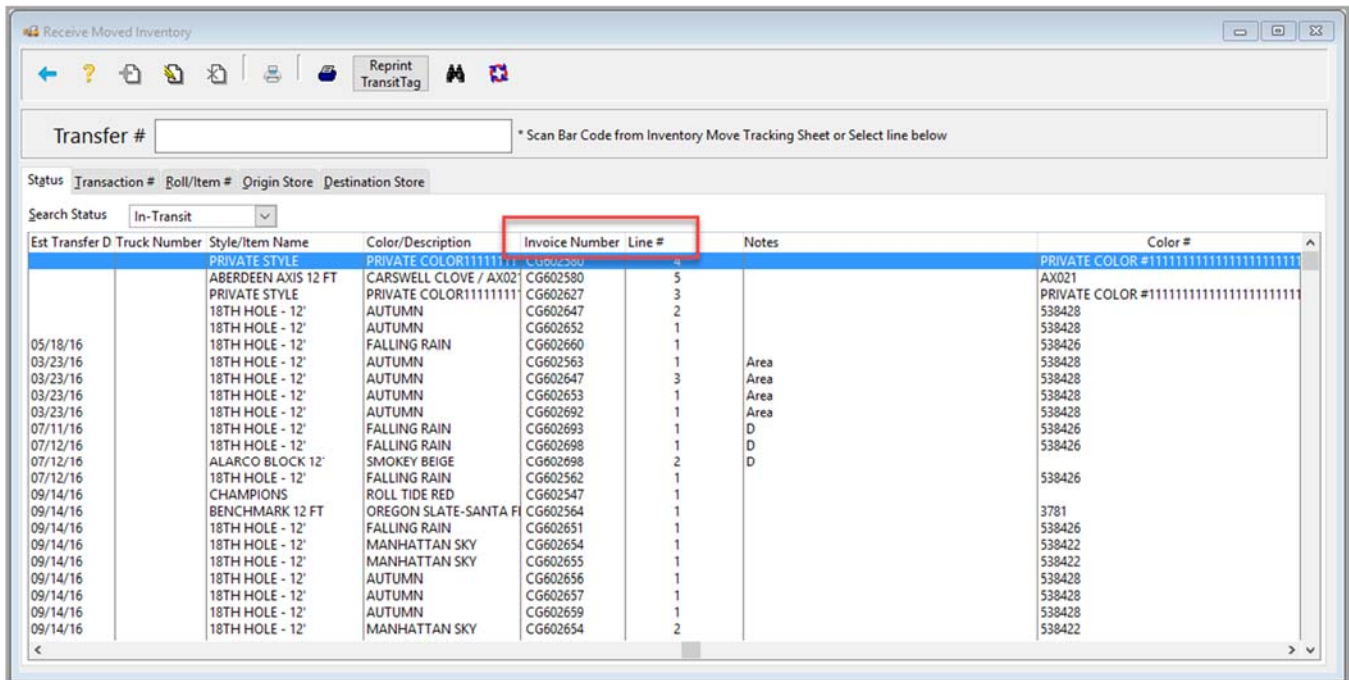


Figure Received Move Inventory screen

If the transfer originates in Order Entry, the line status is requested, and the original Store inventory is from a Stock PO, when the In-Transit Move is complete, the new inventory record will have the Stock Flag.

Summary Report

The number of boxes have been added to the summary sheet.

Inventory Move Summary Report									
Date Printed: 10/06/16									
Sorted By: Origin Store + Destination Store									
Origin	Destination	Trans #	Roll/Item # Product Code	Style/Item Color/Desc	Date Moved Received By	Date Rcvd	New Bin Location Old Bin Location	Width Length	Quantity
"4"	"N"	1087	CG65TO1 01	18TH HOLE - 12' AUTUMN	09/14/16	09/14/16		12.00 1.00	1.33 SY
Completed									
Unit Ship Weight:			Line Total Ship Weight:						
Notes:			Invoice Number:						
Customer Name:									
"4"	"N"	1083	123456 06	BLOGGING PATRIOT BLUE	08/10/16	09/14/16		0.00 0.00	10.00 EA
Completed									
Unit Ship Weight:			Line Total Ship Weight:						
Notes:			50 EA per BX. There are 0.6 BX being transferred						
Customer Name:			Invoice Number:						
"4"	"N"	1074	AREA 01	18TH HOLE - 12' AUTUMN	05/17/16	09/14/16		12.00 1.00	1.33 SY
In-Transit									
Unit Ship Weight:			Line Total Ship Weight:						
Notes:			Customer Name: CUSTOMER LAST, CUSTOMER FIRST						
Customer Name:			Invoice Number: CG602652						
"6"	" "	1046	TEST12046 01	DEUCE - HSC - INV - MESQUITE	01/07/16	01/08/16		12.00 10.00	13.33 SY
Completed									
Unit Ship Weight:			Line Total Ship Weight:						
Notes: test			Invoice Number:						
Customer Name:									
"6"	" "	1040	0170-6X6 06	NAPLES WALL GROUP 1 0170-BOMBAY (6X6)	12/11/15	12/11/15		12.30 8.00	83.25 SF
Completed									
Unit Ship Weight:			Line Total Ship Weight:						
Notes:			Invoice Number:						
Customer Name:									
"6"	" "	1011	194929 01	18TH HOLE - 12' FALLING RAIN	05/15/14	01/07/16		12.00 500.00	666.67 SY
Completed									
Unit Ship Weight:			Line Total Ship Weight:						
Notes:			Invoice Number:						
Customer Name:									
Customer Name:			Invoice Number:						

Figure Inventory Move Summary Report preview

Inventory Move Tracking Sheet

The Sales Representative and the Invoice Number have been added to the Tracking Sheet.

(Original) Page 1
Printed 10/13/16 10:10 AM

Transaction # 1091

Origin Store: "6"

STORE 6
ADDRESS 1
TUSCALOOSA, AL 34758
Tel: 205-943-2262

Destination Store: "

DOCUMENTATION COMPANY
STORE ADDRESS
FAX: 111-222-3333
NORTHPORT, AL 35476

Roll/Item #	Product Code	Style/Item	Width	Length	Quantity
0170-8X8	06 - CERAMIC	NAPLES WALL GROUP 1	12.30	8.00	15.00 SF

Color #: _____ Dye Lot: _____ Color/Desc: 0170-BOMBAY (8X8) Moved: 10/13/16

Carton Size: _____ Received _____ Old Loc: _____ New Loc: _____ Rcvd By: _____

Carton Qty: _____ Sidemark: _____ *In-Transit* _____

Sys Ref #45371 _____ Line Total Ship Weight: _____ (S111)

Unit Ship Weight: _____ Notes: _____

Est Transfer Date: 0/13/16 Sales Rep: FRED LOVE Ship To: MENT, DOC U.

Invoice Number: CG502142 UD JOB # _____

Figure Inventory Move Tracking Sheet preview

The Total Shipping Weight has been added to the Tracking Sheet. This will be the combined total for a Transaction Number.

(Original) Page 1
Printed 08/31/16 10:44 AM

Transaction # 1191

Origin Store: ""

WHEAT'S CARPET ONE-FLOOR/HOME
51 MCFARLAND BLVD
FAX: 205-449-2311
NORTHPORT, AL 35476

Destination Store: "A"

ASHLEY
711 CUTE LN
P.O. BOX 4
TUSCALOOSA, AL 35401

Roll/Item #	Product Code	Style/Item	Width	Length	Quantity
#28 MG-6	04 - CUSHION	#28 MEDIUM GRAY	0.00	0.00	2.00 LF

Color #: _____ Dye Lot: _____ Color/Desc: 01N VINYL COVEBASE Moved: 08/31/16

Carton Size: 20 LF per BX Received _____ Old Loc: _____ New Loc: _____ Rcvd By: _____

Carton Qty: There are 0.1 BX Sidemark: JESSUP, BILL *In-Transit* _____

Sys Ref #45983 _____ Line Total Ship Weight: 20 oz (S204)

Unit Ship Weight: 10 oz Notes: _____

Total Shipping Weight: 1.25 lb

Figure Inventory Move Tracking Sheet preview

Reports

Roll/Item Inventory Range Report

Reports > Roll Inventory Range Report or Item Inventory Range Report

Load has been added to the CSV for these reports.

Store	PC	Manufact	Supplier	Invoice #	Invoice D	Fiber	Style	Style Num	Color	Color	Freight	Private Su	Unit Price	Reserve A	Load
	1		DIXIE GRO	023399A	20050302		HOSTESS	101016	PALE FAW	1	0	0.49	38.10182	0	5
	1		DIXIE GRO	23399	20050302		HOSTESS	101016	PALE FAW	1	0	0.49	38.10182	0	0
	1		MOHAWK	ST05807	20050301		STRIKE BA	9554	ACORN-8	8	0	0	0	0	0
	1		MOHAWK	ST05807	20050301		STRIKE BA	9554	ACORN-8	8	0	0	0	0	0
	1		MOHAWK	ST05807	20050301		STRIKE BA	9554	ACORN-8	8	0	0	0	0	0
	1		MOHAWK	ST05807	20050301		STRIKE BA	9554	ACORN-8	8	0	0	0	0	6
	1	-----	SHAW INC	7529696	20050422		IMPRESAR	QA1589	TROPIC WAVE		0	1.279	27.01636	0	0
	1	1099 SUPP	TEST	TEST678	20160108		1111	1213	111		0	0	1099 SUPP	9	0
	1	ALADDIN	MOHAWK	C8303120	20050914		ABADAN	CT001	GOLDEN G		0	0.603	ALADDIN	15.07818	0
	1	ALADDIN	MOHAWK	C2903583	20011025	UNBR / XY	ABADAN	130809	GOLDEN G	84	0	0.198	CARPET O	11.43818	0

Figure Range Report CSV

Purchase Order Listing Report

Reports > Purchase Order Listing Report

The option to select the printer the report will print to has been added to the Purchase Order Listing Report screen.

Figure Purchase Order Listing Report screen

The Purchase Order Reference Number (Reference #), PO Length, and Width has been added to the CSV.

1	Color / De	Private Cc	Sidemark	Roll / Cut	Amount C	Units	Promise D	ti Item Syste	Gross Cost	Reference #	PO Length	Width
2	DORADO (DORADO (/ Stock	-----	2878.26	SF		45447	2.05		0	0
3	CPT TILE A	CPT TILE A	KYSER COI	-----	900	SF		45538	0.08		0	0
4	MEMBRAN	MEMBRAN	CG400989	-----	899.98	SF		45549	0.8		0	0
5	GROUT	GROUT	KYSER COI	-----	2800	SF		45566	0.08		50.59	0
6	SHAW 410	SHAW 410	KYSER COI	-----	15500	SF		45567	0.17		50.59	0

Figure Purchase Order Listing Report csv

Purchase Order Summary Report

Reports>Purchase Order Summary Report

The options to select the printer the report will print to and to send the file to CSV have been added to the Purchase Order Summary Report screen.

The screenshot shows the 'Purchase Order Summary Report' window. It includes a 'Stores' list on the left, a 'PC' table with columns 'PC' and 'Description', and various filter and print options. A red box highlights the 'Output CSV To' field set to 'RFMCSV.CSV' and the 'Printer' field set to 'hp LaserJet 1320 PCL 5'. The 'Print' and 'Exit' buttons are at the bottom right.

Figure Purchase Order Summary Report screen

Stock Status Report

Reports>Stock Status Report

The option to run the report for Stock Material Only. A reorder level must be set in the Product record for this to work.

The screenshot shows the 'Stock Status Report' window. It includes a 'Stores' list on the left, a 'PC' table with columns 'PC' and 'Description', and various filter and print options. A red box highlights the 'Stock Material Only' checkbox. The 'Print' and 'Exit' buttons are at the bottom right.

Figure Stock Status Report screen

Item Inventory Physical Report (Version 17.0.1)

Reports>Item Inventory Physical Report

Carton Quantity has been added to the CSV.

C	D	Q	R	S	T	
Name	Descriptio	Locati	er	Construct	Country	Carton Qty
LUXOR-8X	0044A-BLACK					0
PERGOLA-	BELL VINE					0
PERGOLA-	BELL VINE					0
PERGOLA	BELL VINE					0
PERGOLA	BELL VINE					0
PATRIOT F	ONCE AND ALWA					0
ESTATES-S	350					0
GRAND SL	BLACK-00660					0

Figure Item Inventory Physical Report CSV

Products

System Options

Enable Edit in Place for Products Cost

*Utilities>System Options>Products>General
Category Configuration*

Type-Can be Global, Assigned or User

This System Option allows the user to edit the Roll, Cut, Item, and Service Cost columns in the browse when it is set to Yes.

Find Screen

Pile Weight fields have been added to the Product Find Screens in Order Entry.

Product Custom Filter

Filter Parameters Additional Parameters

Product Codes

PC	Description
01	CARPET
02	VINYL

Private Supplier [F8] UD Product [F8]

Private Style [F8] FOB Point [F8]

Private Style# [F8] Warranty [F8]

Priv Collection [F8] Fiber [F8]

Priv Color/Desc [F8] Toxicity # [F8]

Priv Color/Desc # [F8] EC Account # [F8]

Manufacturer [F8] Products in set [F8]

Supplier [F8] Pile Weight From 0.0000 To 999.0000 oz

Style # [F8] Input Date From 01/01/80 To 12/31/79 [F8]

Collection [F8] Trans Date From 01/01/80 To 12/31/79 [F8]

Color/Desc [F8] Active Inactive

Color/Desc # [F8] Manual E-Commerce

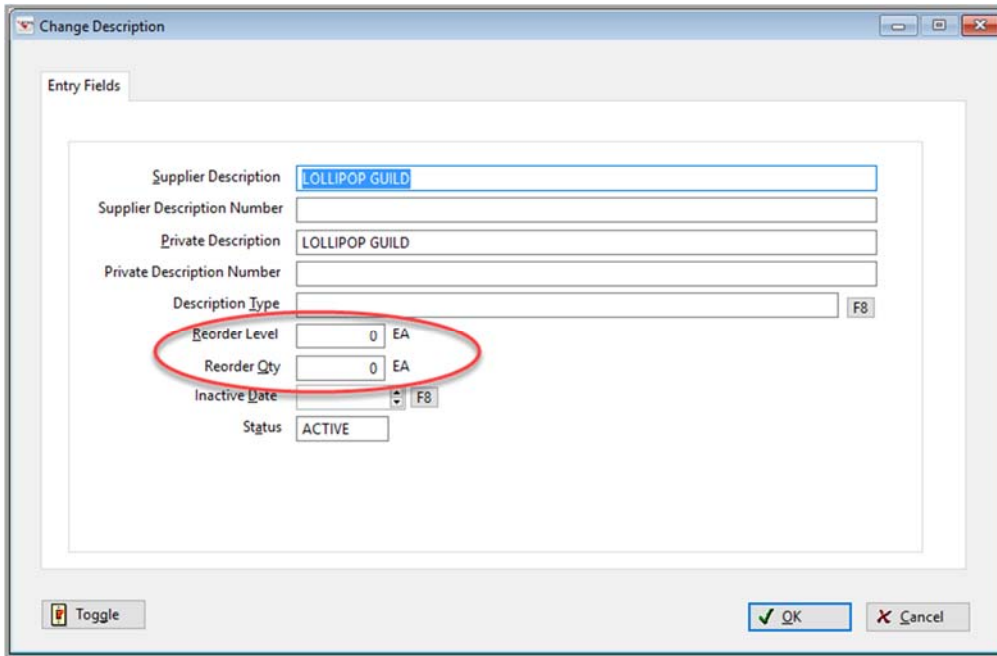
Imported Import w/XXRef RFMS Created

Clear [OK] Cancel

Figure Product Find Screens

Rolls/Items

A unit has been added to the Reorder Level and Reorder Qty in both Rolls and Items.



General Range Edit

File>General Range Edit

Special Pricing fields Special Roll, Special Cut, and Special Item have been added to the General Range Edit.

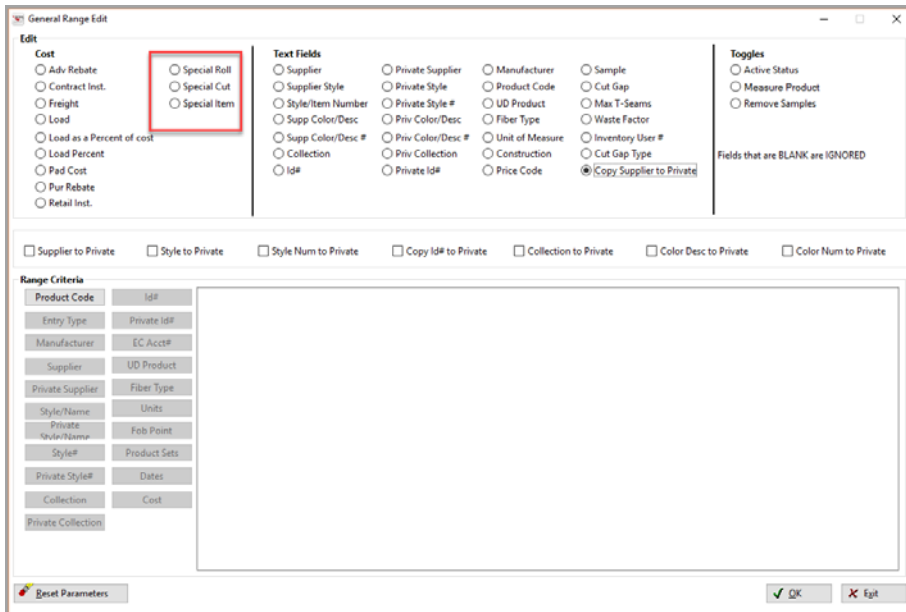
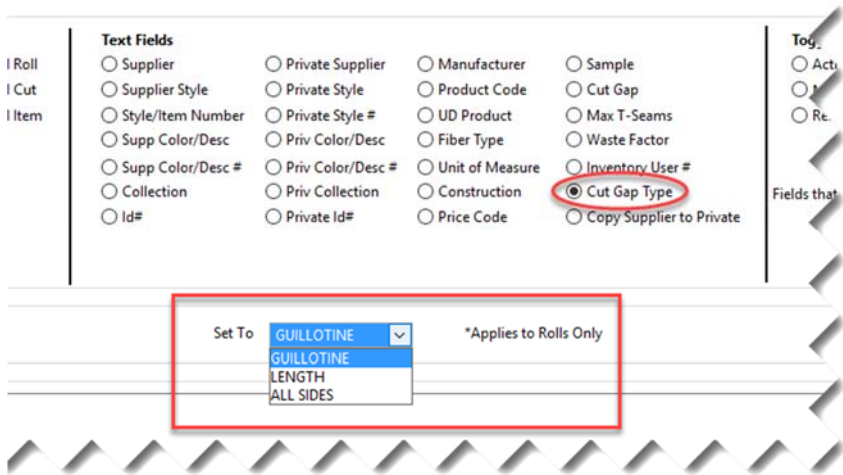
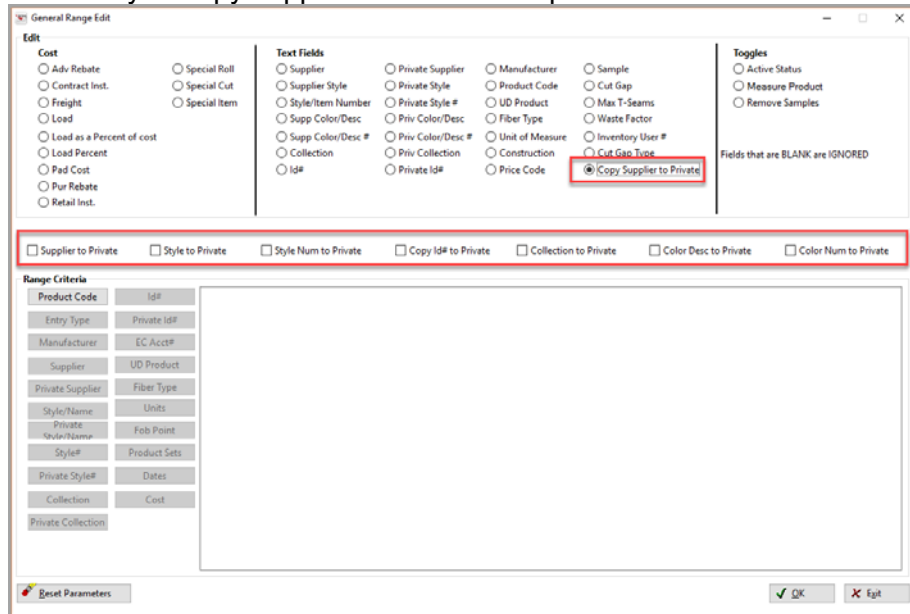


Figure General Range Edit Screen

The ability to edit Cut Gap Type has been added.



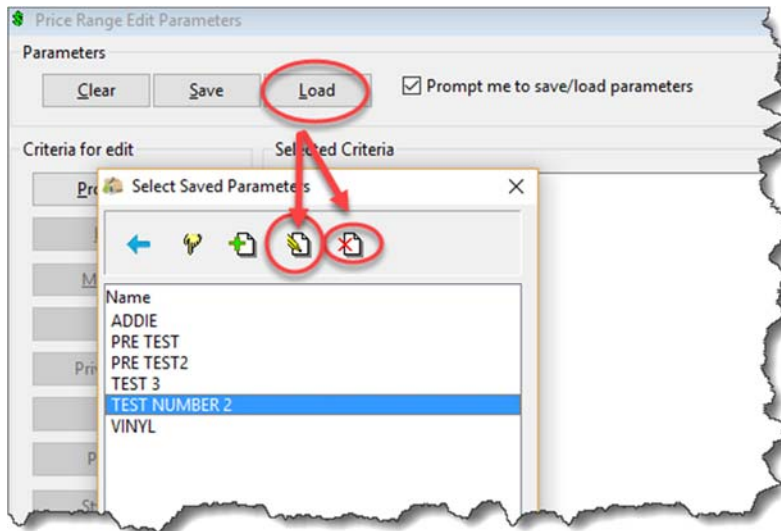
The ability to copy supplier information to private has been added.



Price Range Edit

File>Price Range Edit

The ability to edit and delete Saved Parameters has been added.



Reports

Price List Report

Reports>Price List Report

The Full and Regular reports have been combined on one screen.

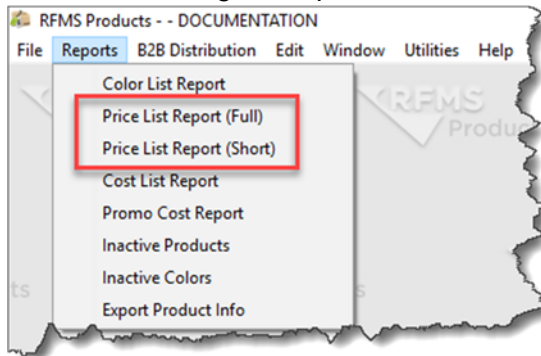


Figure Version 16.1

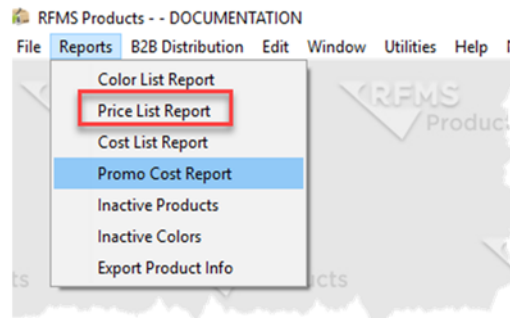


Figure Version 16.2

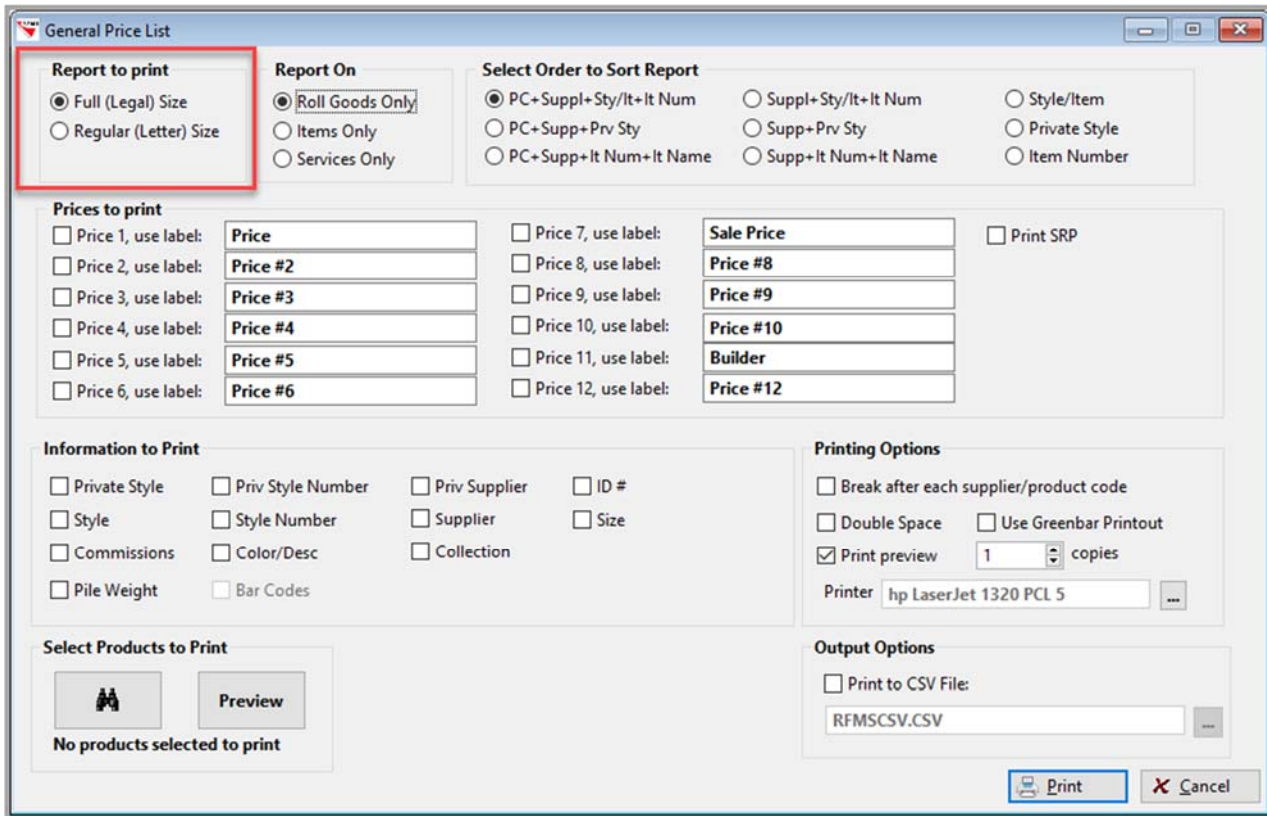


Figure General Price List screen

Export Product Info

[Reports>Export Product Info](#)

The ability to set where the export.csv file goes has been added.

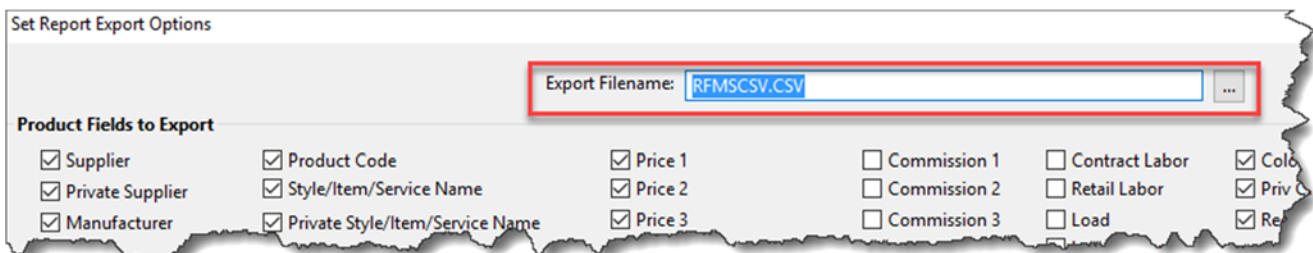


Figure Export Options screen

Utilities

Product Import/Export (PIE)

A new tool to import products into the RFMS Product File. This tool uses a single spreadsheet of information while the older import product was a combination of spreadsheets. For more information, click [here](#).

Accounting

Accounts Receivable

Print Statements

File>Accounts Receivable>Statements>Print Statements

When emailing statements, the user can now create a standard message to appear in the body of the email.

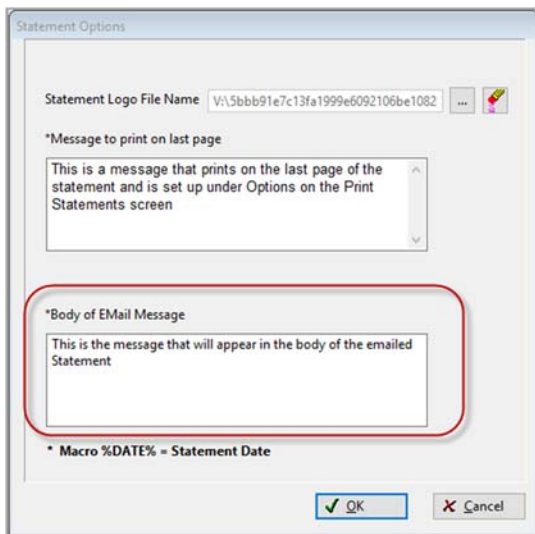


Figure Statement Options Screen

Statements can now be sorted by Order Date.

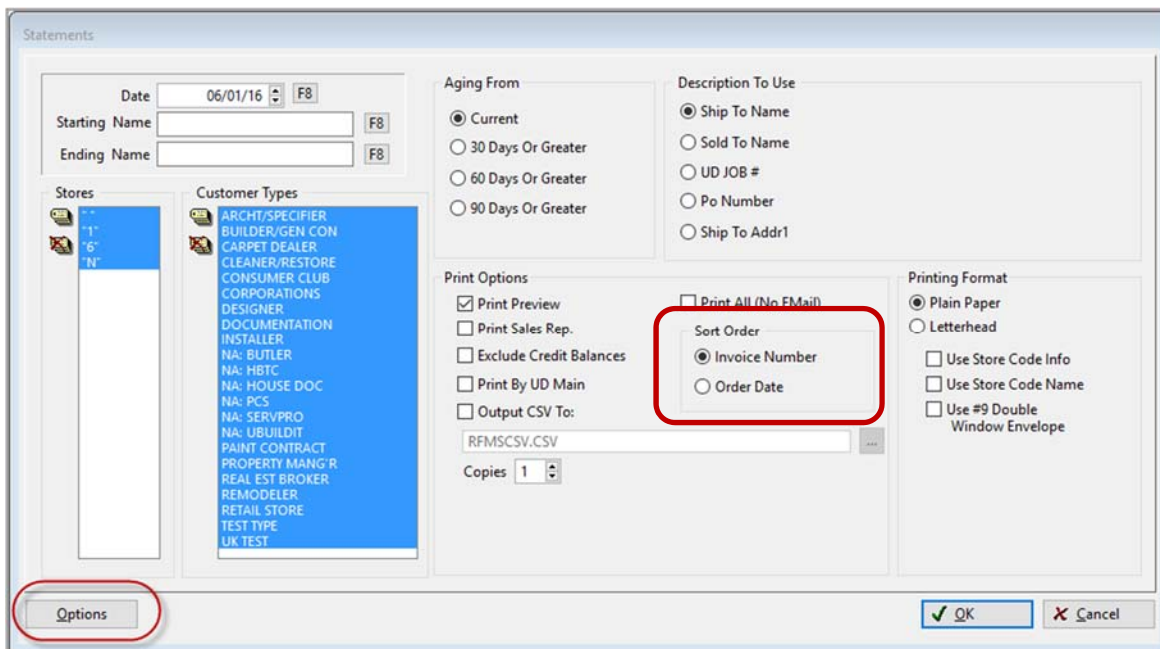


Figure Print Statements Screen

Aging Report

File>Accounts Receivable>Aging Report

The headings on the CSV for aging periods now match the Aging Periods put in as parameters.

Recurring A/R

When line commissions are turned on, the commission percent will be imported from products. When Recurring A/R is exported to Order Entry, the commission will be on the line.

After processing the query tagging filter, the results are tagged and ready for export to Order Entry. If the user edits one of the records that no longer meets the filter criteria, it will now untag that record so that it does not get exported.

Accounts Payable

Post A/P to Order Entry

GST Tax Paid is backed out of the amount posted as it is a pass through not an actual cost on the job.

Find Screen

Date Paid has been added to the Find Screen.

The screenshot shows the 'Find Payables' dialog box with the following fields and options:

- Supplier: [] F8
- Invoice #: []
- Invoice Date From: 01/01/80 F8
- Invoice Date To: 12/31/79 F8
- Trans. Date From: 01/01/80 F8
- Trans. Date To: 12/31/79 F8
- Due Date From: 01/01/80 F8
- Due Date To: 12/31/79 F8
- Date Paid From: 01/01/80 F8** (highlighted)
- Date Paid To: 12/31/79 F8** (highlighted)
- Check # From: 0
- Check # To: 999999
- Paid Online
- Act Code: 000 F8
- Tied To: []
- Open Payables Only
- Origin:
 - Post Payable
 - Banking
 - Providers
 - Edited After Costing
 - Claims
 - Costing
 - Payroll
 - Service PO

Buttons at the bottom: Clear, Save, Load, OK, Cancel.

Figure Find Screen

Discount Rate

The Discount Rate is now editable even if the discount=0%.

Supplier: DOC U. MENT F8 Invoice #: LAVA TEST
 Trans Date: 05/12/16 Invoice Date: 05/12/16 F8
 Days Until Due: 0 Status: Open
 Due Date: 05/12/16 F8 Date Paid:
 Discountable: 0.00 Check #:
 Non Discountable: 36,666.50 Checking Acct.:
 Invoice Total: 36,666.50 Proj. Disc. Amount: 0.00
 Disc Rate: 0.00% Proj. Check Amount: 36,666.50

SC	Account Code	Sub	Amount	Comment
**	140	01	36,666.50	

Buttons: A/P Detail, Insert, Change, Delete, F7 Copy, Notes, Remit, OK, Cancel

Figure Add/Edit Payable Screen

Remittance Notice

The Supplier Account Number has been added to the Remittance Notice.

DOCUMENTATION
REMITTANCE ADVICE

Invoice Number	Inv. Date	Due Date	Invoice Amount	Discount Amount	Check Amount
DOC U. MENT Act#: 9999999999999999					
REMIT DOC	06/06/16	06/06/16	100.00	0.00	100.00
Test for Supplier Information					
			100.00	0.00	100.00

Figure Remittance Advice

Suppliers

File>Accounts Payable>Suppliers

The Routing Number has been added to the supplier browse so that a sort can be done to show which suppliers have EFT information and which do not.

Supplier	Payee	Supplier Contact	Contact Phone	Fax Number	Account #	EMail	Routing Number[-]
SUPPLIER	SUPPLIER PAYEE	SUPPLIER CONTACT	205-999-0000	2059990001	SUPPLIER ACCOUNT	klee@rfms.com	ROUTING #
EFT SUPPLIER	EFT SUPPLIER						ROUTING #
ACTION AWARDS	ACTION AWARDS		770-972-3680	770-972-4073	WIHECAR		REOUTING
INVISTA	BANK OF AMERICA				55611594		C
THE R.A. SIEGEL COMP	THE R.A. SIEGEL COMPANY	F404-355-2982/800-476-399 X331	800-476-9818		56260	johnm@rasiegel.com	456465
1099 SUPPLIER NEW	1099 SUPPLIER NEW						123456
AAA COOPER	AAA COOPER TRANSPORTATION		553-2920		402754		
ABZ	ABZ RENT-ALL		759-5444				
ADVANCE BUSINESS	ADVANCE BUSINESS	KERRY CELL 344-3601	205-758-0614	25-758-0742	142770		
ALA. INCOME TAX DEP.	ALA. DEPT. OF REVENUE						
AL PROFESSIONAL EXT	ALA PROFESSIONAL EXTERMINATORS		951-9717				
ALABAMA POWER	ALABAMA POWER COMPANY		888-430-5787				
SIPSEY VALLEY SUPPLY	SIPSEY VALLEY SUPPLY		758-5548				

License Information including the beginning and ending date have been added to the Supplier Information screen.

Record Will Be Changed

Supplier: 1099 SUPPLIER

Pay To: 1099 SUPPLIER

License Information:

- Contractor: []
- Begin: [] F8
- End: [] F8
- Specialty: []
- Begin: [] F8
- End: [] F8
- Self Ins. Cert.: []
- Begin: [] F8
- End: [] F8
- Workman Comp.: []
- Begin: [] F8
- End: [] F8

Buttons: OK, Cancel

Figure Supplier Information Screen

Check Writing

File > Accounts Payable > Check Writing > Flag Payables

An Invoice Date Column has been added to the browse screen.

Supplier	Payee	Invoice	Gross Amount	Disc. Rate	Net Due	Due Date	Invoice Date
1099 SUPPLIER	1099 SUPPLIER	160506	45.00	2.00	44.10	04/06/16	04/06/16
1099 SUPPLIER	1099 SUPPLIER	20160328	50.00	2.00	50.00	03/28/16	03/28/16
1099 SUPPLIER	1099 SUPPLIER	2123	50.00	0.00	50.00	08/12/15	08/12/15
84 LUMBER COMPANY	84 LUMBER COMPANY	SC-150831-0100	1.00	0.00	1.00	08/31/15	08/31/15
A-1 SHARPENING SERVICE	A-1 SHARPENING SERVICE	140401-CREDIT	-25.00	0.00	-25.00	04/01/16	04/01/16
A-1 SHARPENING SERVICE	A-1 SHARPENING SERVICE	20160412	50.00	0.00	50.00	04/01/16	04/01/16
ALABAMA CENTRAL GLASS	ALABAMA CENTRAL GLASS	160229	500.00	0.00	500.00	02/29/16	02/29/16
ALABAMA HOMEBUILDERS	ALABAMA HOMEBUILDERS SELF IN	14052-SAFETY CF	-6,705.39	0.00	-6,705.39	01/10/13	01/08/13
ARMSTRONG WORLD INDUSTRIES	ARMSTRONG WORLD INDUSTRIES	151117	144.00	0.00	144.00	03/27/15	11/08/15

Figure Flag Payables Browse Screen

When flagging payables (if using Direct Deposit), a user can choose to view EFT only, NON-EFT only, or ALL

Supplier	Payee	Invoice	Gross Amount	Disc. Rate	Net D
1099 SUPPLIER	1099 SUPPLIER	160506	45.00	2.00	44.10
1099 SUPPLIER	1099 SUPPLIER	20160328	50.00	2.00	50.00
1099 SUPPLIER	1099 SUPPLIER	2123	50.00	0.00	50.00
MOHAWK INDUSTRIES	MOHAWK FACTORING INC.	150930	1,348.68	500.00	-5,394.12
MOHAWK INDUSTRIES	MOHAWK FACTORING INC.	160302	5,693.40	500.00	-22,773.60

Ctrl + Left Click to Tag/UnTag Entire Supplier Total Flagged A/P: 0.00 Total Check Amount: 0.00 No. Checks Needed: 0

Invoice Date: 04/06/16 Disc Rate: 2.00 Non Disc: 0.00
 Due Date: 04/06/16 Discountable: 45.00 Invoice Total: 45.00

All EFT Only Non-EFT Only

Figure Flag Payables Browse Screen

The ability to print a copy of all emailed remittances has been added to the Checking Writing Information Print Screen.

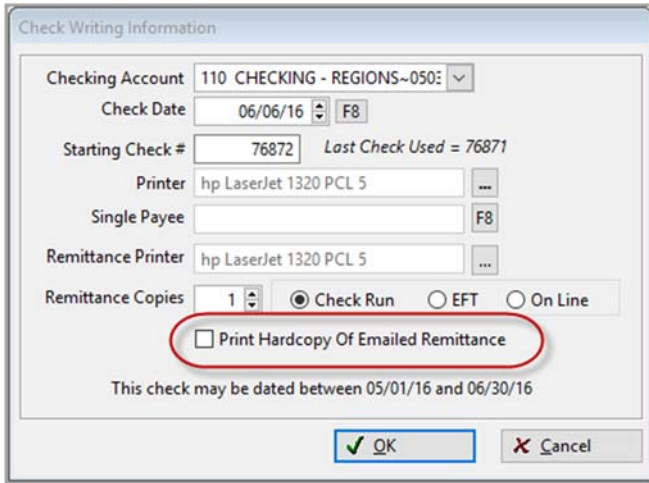


Figure Check Writing Information Screen

EFT

The EFT Transfer file (US) now includes the Supplier Account Number.

A/P Reports

A/P Due Report

[File](#)>[Accounts Payable](#)>[A/P Reports](#)>[A/P Due](#)

This reports now sorts by Supplier/Due Date. The sort use to sort by Supplier/Invoice Number.

License Information Report

[File](#)>[Accounts Payable](#)>[A/P Reports](#)>[License Information Report](#)

A report that pulls the License Information from the Worker or Supplier Information screen has been added.

The screen allows you to print ALL the license information or only print the expiring ones.

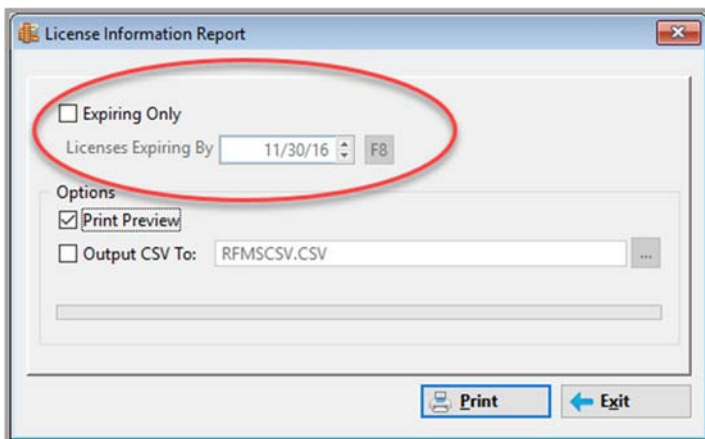


Figure License Information Report Print Screen

DOCUMENTATION			
License Information Report			
All			
* From Worker; ** From Supplier			
	License	Begin Date	End Date
* CREW, TEST			
ContractorLic	CREW TESTER	01/01/16	12/31/16
SpecialtyLic	DOCUMENT	01/01/12	12/31/18
** DOC U. MENT			
ContractorLic	TEST	01/01/16	12/31/16
SelfInsCert	123A567B890Q	09/01/16	09/01/17
SpecialtyLic	TESTING	01/01/14	12/31/18
WorkCompPolicy	98765432XX	01/01/16	12/31/16
* MENT, DOC U.			
SpecialtyLic	1234567890	08/01/15	08/01/18
** TEST			
ContractorLic	TESTING FOR FUN	09/01/16	12/31/17
SelfInsCert	876543JKL210	01/01/16	12/31/16
SpecialtyLic	DOCUMENT	01/01/13	12/31/18
WorkCompPolicy	123JKL456POI789XX	01/01/16	12/31/16

Figure License Information Report-All License Information

Recurring A/P

[File>Accounts Payable>Recurring A/P>Recurring A/P](#)

The ability to sort by the Day Due column has been added.

General Ledger

Chart of Accounts

[File>General Ledger>Chart of Accounts](#)

GST Coding has been added to the Chart of Accounts print out.

View Journal

[File>General Ledger>View Journal](#)

Account Name and Journal SeqNum have been out to the CSV output.

Trans Date	Account C	Sub Code	Store	LineN	Provider	UD JOB #	Act. Name	Journal SeqNum
20041004	140	0	" "	0			INVENTORY	2314
20041004	140	1	" "	0			INVENTORY	2315
20041004	140	1	" "	B			INVENTORY	2316
20041004	140	2	" "	0			INVENTORY	2317
20041011	154	0	" "	0			PREPAID TAXES	2515
20041011	570	0	" "	0			TAXES AND LICENSES	2514
20041015	140	11	" "	0			INVENTORY	2668
20041015	140	11	" "	S			INVENTORY	2669

Figure View Journal CSV

Budget

File>General Ledger>Budget>Budgets>Print



The Budget Reports can be sent to CSV.

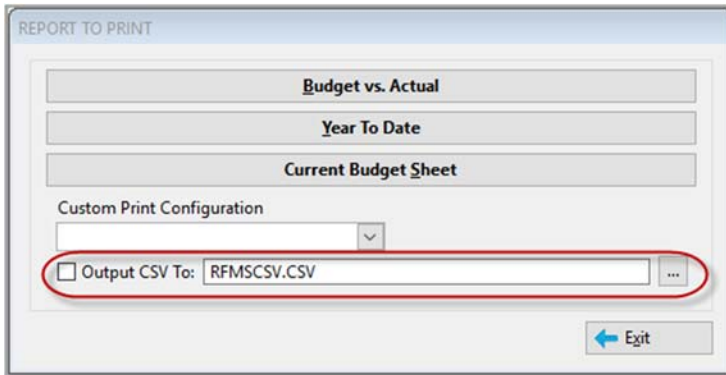


Figure Budget Report Print Screen

Journal Batch Entries

File>General Ledger>Journal Batch Entries

Number format now allows -99,999,999.00

G/L Functions

The Clear G/L function has been removed.

Banking

Add/Edit Checks

File>Banking>Add/Edit Checks

The Amount field has been added to the Find Screen.

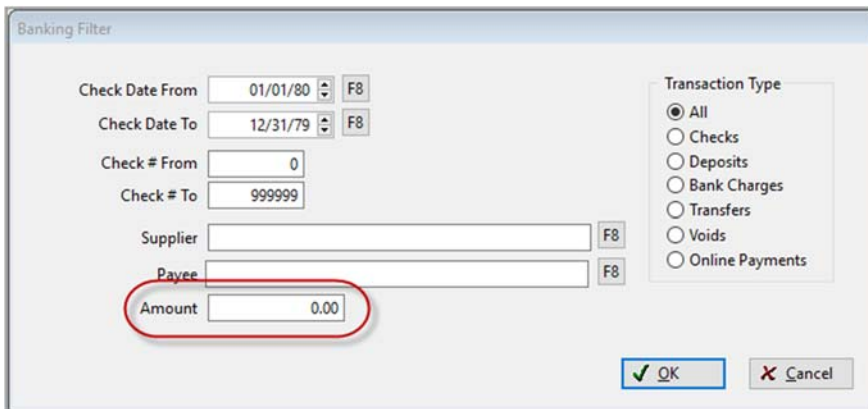


Figure Banking Find Screen

Sales Commission

Print Commissions

File>Sales Commission>Print Commissions

The Line Commission Detail has been added to the CSV file.

	A	B	C	D		R	S	T	U	V
1	Comm_Pa	Debt_Sett	Del_Date	Date_Paid	In_Sc	DaysToPa	ShipInfo	StoreCode	IsLineComm	
2		1	20130121	20130109	CG	1	-12 DRUMMO	" "		0
3		1	20151112	20151112	CG	1	0 MENT, DO	" "		0
4		1	20151211	20130401	CG	1	-984 CUSTOME	" "		0
5		1	20130719	20130719	CG	1	0 *****CRI	"1"		0

Figure Print Commissions CSV

Commissions Reports

Inactive Sales Representatives are not shown in the list, but if All Sales Reps are tagged and there is data for an Inactive Sales Representative in the period then the data will print.

Month End

GST Report

Accounting>File>Month-End>GST Report

A Summary Page has been added for Canada on the GST Report Print Screen

Stores

Begin Date: 05/01/16 F8

End Date: 05/31/16 F8

Options

- Print Preview
- Summary
- Output CSV To: RFMSCSV.CSV

Combined

Print Exit

Figure GST Report Print Screen

DOCUMENTATION
GST Report
From 05/01/16 To 05/31/16
* Denotes Journal Batch Number

Page No: 1
05/31/16
03:00PM

Date	ID#	Name	Rate	Sale Value	Purchase Value	Tax Collected	Tax Paid
Store ""							
GST							
				GST Totals:	0.00	3,344,131.98	0.00
				Store "" Totals:	0.00	3,344,131.98	0.00
Store "1"							
GST							
				GST Totals:	0.00	11,459.32	0.00
				Store "1" Totals:	0.00	11,459.32	0.00
Store "6"							

Figure GST Report Summary

Utilities

Configure AP Checks

The ability to add and Print Bank Name and Fractional Routing has been added.

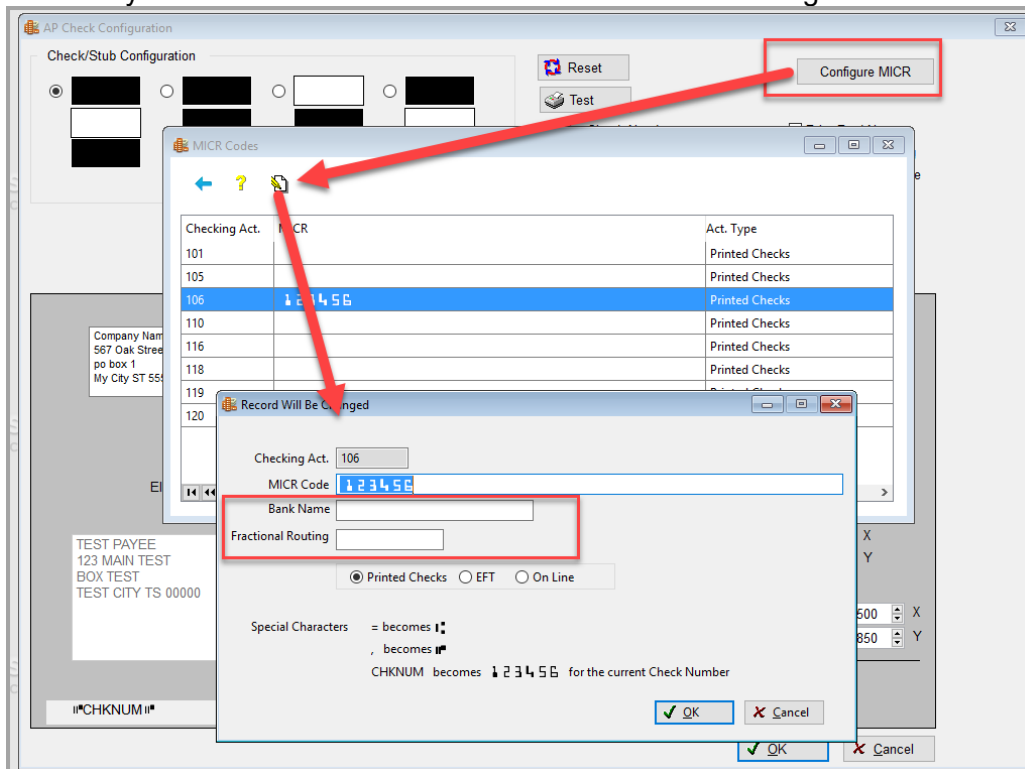


Figure Configure MICR

New York City Withholding Tax Tables for July 1, 2017

New York City tax tables have been updated and will go into effect on July 1, 2017. This is dependent on having HR Version 17.0.6 or later.

Tax Changes (Version 17.0.8)

Australia Tax Changes

Australia Tax calculations for 01 July 2017 have been updated.

Illinois Tax Changes

Illinois Tax Rates (effective July 1, 2017) have been updated.

Idaho Tax Changes

Idaho Tax Rates (effective July 17, 2017) have been updated.

IRS Tax Information (W-2 and 1099-MISC) (Version 17.0.6)

IRS will not accept W-2 or 1099-MISC information that has negative totals in any of the submitted information.

To prevent this from happening, a procedure has been developed that will stop any IRS forms from being generated until the negative figures have been fixed.

If there are negative figures, the user will be presented with a printable report that will describe the forms(s) affected.

All the procedures listed will exit with the exception of "Browse W-2 & 1099 Information" which will remain in the browse so the problem(s) can be fixed.

File / End of Year / Browse W-2 & 1099 Information
File / End of Year / Tax Forms Summary (Print)
File / End of Year / W-2 & 1099 Forms (Print)
File / End of Year / Export Tax Forms to CSV
File / End of Year / Electronic Filing / W-2 Reporting
File / End of Year / Electronic Filing / 1099 Reporting

Sales Reports

Inactive Sales Representatives do not show in the pick list for reporting. If all Sales Representatives are tagged and there is a data for an INACTIVE Sales Representatives in the period then the data will print.

The ability to save filter now allows a schedule task to be created. Your IT will be responsible for setting this up.

Materials Analysis

File > Material Analysis > Orders or Quotes

The ability to save and load filters has been added to the Material Analysis screen. For more information on saving and loading filters, click [here](#).

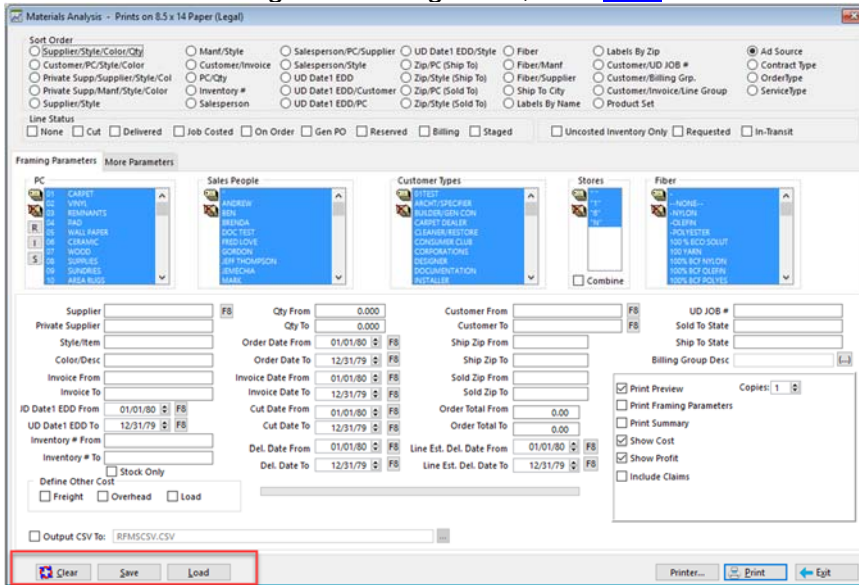


Figure Material Analysis screen

Sales

Open Orders (Version 17.0.1)

File > Sales > Open Orders

The InTransit Status and Inventory Store have been added to the Open Orders CSV.

R	S	T	U	V	W	>
Payments	Balance	PercPaid	Transit Status	Inventory Store		
0	383.75	0		DOCUMENTATION COMPA		
0	5702.11	0		MY NEW STORE		
0	90.5	0		DOCUMENTATION COMPA		
0	0	0		DOCUMENTATION COMPA		
0	255.06	0		MY NEW STORE		
0	3744.67	0		DOCUMENTATION COMPA		
0	1307.67	0		DOCUMENTATION COMPA		

Sales Totals

[File>Sales>Sales Totals](#)

The ability to save and load filters has been added to the Sales Total screen. For more information on saving and loading filters, click [here](#).

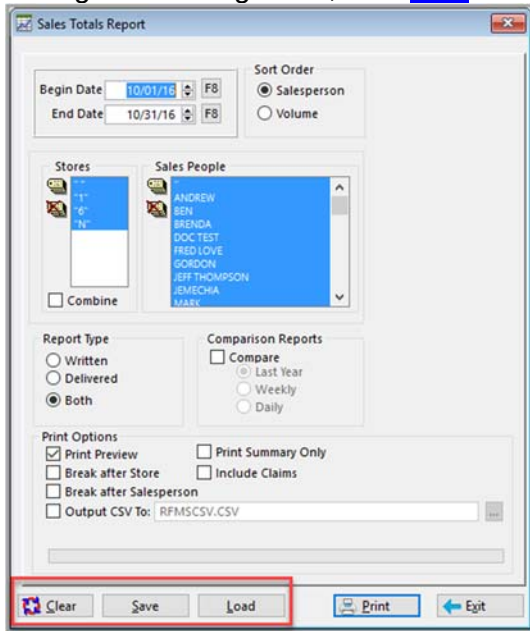


Figure Sales Totals Report screen

Profitability

Job Cost Analysis

[File>Profitability>Job Cost Analysis](#)

The ability to save and load filters has been added to the Job Cost Analysis screen. For more information on saving and loading filters, click [here](#).

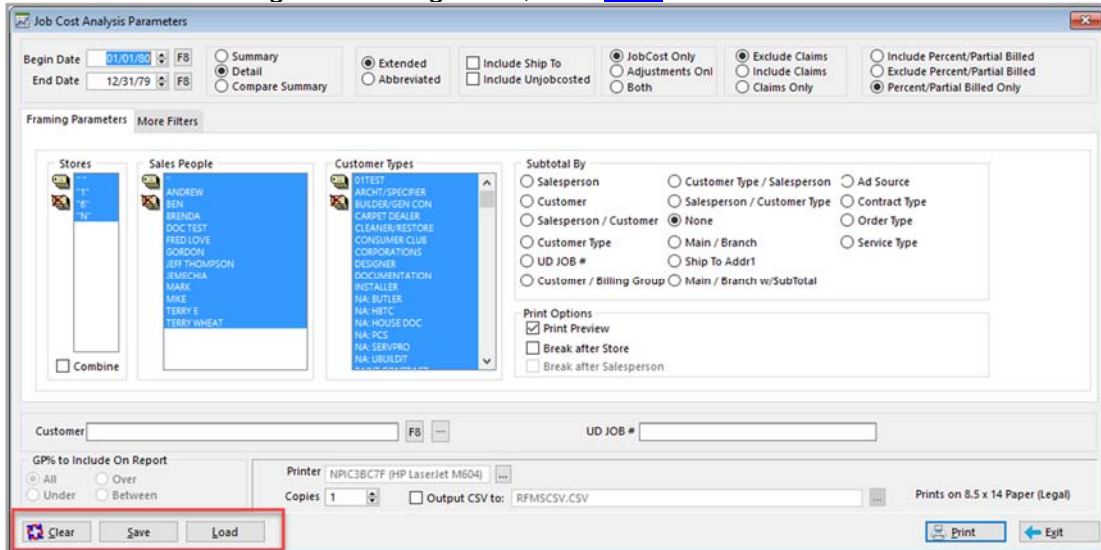


Figure Job Cost Analysis screen

E-Commerce

System Options

Default Folder location for EDI Documents

[Utilities>System Options>E-Commerce>General Category Configuration](#)

Type- Must be Global 🚫

This system option allows users to globally set the path where E-Commerce files are downloaded and uploaded.

Smart Search for EC Invoices

Smart Search is NOW available in the EC Invoice Screen. All the Pending Invoices will NO Longer populate the screen when you first open the Electronic Invoice Reconciliation Screen:

In the Search field you can search by Invoice Number, Supplier and Po Number.

Electronic Invoice Header					Electronic Invoice Lines								
Inv Date	Invoice #	Supplier	RFMS PO #	Status	Line	Style/Item #	Color/Desc #	Unit	Unit Cost	Line Total	Quantity		
											Invoiced	Matched	Left to Match

Inventory Lines														
SC	PC	Roll/Item #	Supplier	PO Number	Gross Cost	Net Cost	Freight	Fit Factor	Load	Unit	Line Total	Quantity		
												Ordered	Matched	Left to Match



The Find Icon allows you to search on the following information:

ECommerce Invoice Filter

Invoice # Invoice Date F8

PO # PO Date F8

Supplier F8 Due Date F8

Account # F8

Ship To Name

Bill Of Lading

Status
Pending

Figure Find Screen

The ability to add or subtract days to or from the EDI Delivery and Promise date on the Purchase Order has been added.

An Access Code will now be required to reset an EC purchase order that is stuck in Sent (EC) status.

RIMS Inventory - WHEAT'S CARPET ONE

File Edit Reports Window Utilities Help Mail Navigator

Purchase Orders

Search

PO # - Line #	Ordered	SC	PC	Supplier	Status	Private Style / Name	Private Color / Description	Promise Date	Length	Qty-Ord	Qty-Rcvd	Unit Cost	Total Cost	Measure Date	Est Del Date	Roll/Item #	Item Seq#	Sidemark
#ST09701-0001	09/13/16	**	01	BEAULIEU OF AMERICA	Sent(EC)	ACE OF SPADES II - 12	BROWN SUGAR	09/13/16	10.00	13.33	0.00	\$12.5600	\$167.42			#ST097010001	0	
#ST09702-0001	10/14/16	**	17	SHAW INDUSTRIES	Sent(EC)	TANGLE TILE	MAGNETIC	10/14/16	2.00	239.85	0.00	\$15.7700	\$3,782.43			ST018	1	

Please Enter Access Code

000 10/28/2016

Supplier: 800-919-6483
 Account #: 500285
 E-Mail:

Manufacturer: BEAULIEU OF AMERICA
 Private Supplier: CARPET ONE
 Style: ACE OF SPADES II - 12
 Color: BROWN SUGAR
 Roll #: #ST097010001
 SKU: 2279 AB 1200 07

Units: SY
 Length: 10.00
 Qty: 13.33
 Unit Cost: \$12.5600
 Total Cost: \$167.42
 FOB:

Ordered By: CA
 Taken By: EC Sent
 Promise Date: 09/13/16
 Est Del Date:
 Sidemark:
 Comments:
 Ref #:

Web Services

Web Services can now be accessed from Products and Order Entry.

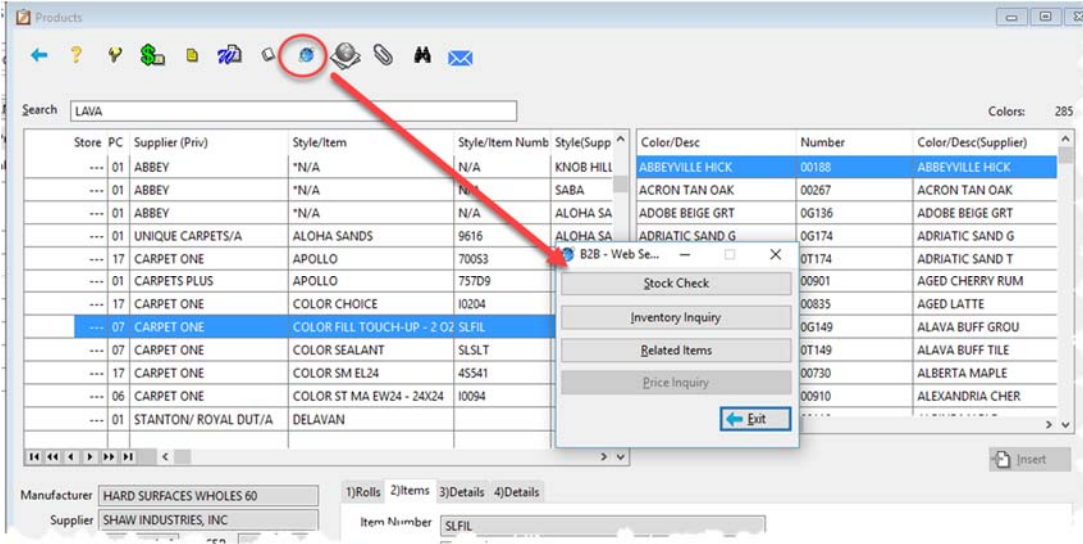


Figure Products screen

It can also be accessed from the Web Services button in an order.

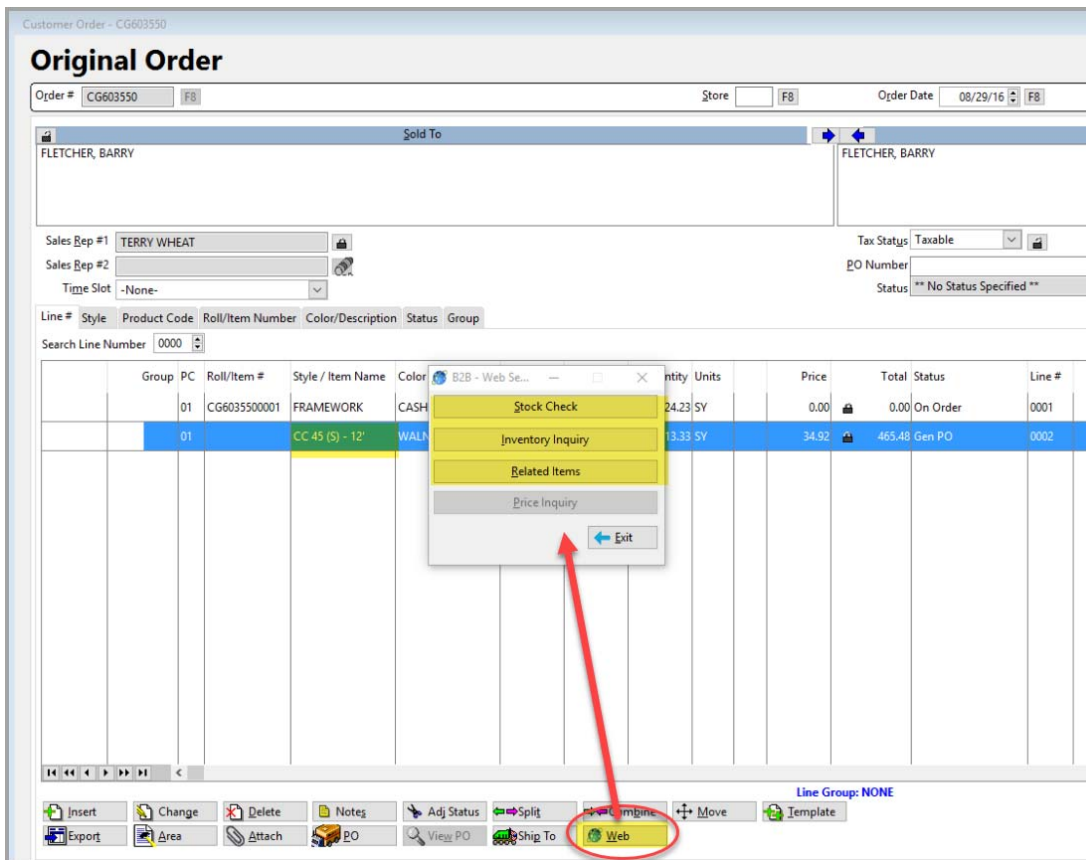


Figure Web Services from Line Browse

The ability to sort by columns has been added to the Inventory Inquiry.

The UOM field in Items for E-Commerce records is now locked down. It cannot be changed manually.

Mult-Pay

Mult-Pay has been updated to insure that off-balance payments cannot be made. Starting with Version 17.0, the following rules will be in place.

1. Initially, the Tag, Distribute, Preview and Post buttons will be disabled.
2. When Orders are added to the browse, the Tag will be available.
3. When Check, Cash or Credit payment(s) are added, the Distribute button will be available.
4. When the Distribute button is pressed, the money is apportioned, and then the Preview and Post buttons are available.
5. The Received amount is the total of Check, Cash and Card payment(s) and thus should equal Money Received. If Check, Card or Card amount is changed, the Preview and Post buttons will not be available until the amount is redistributed. This can be done either with the Distribute button or adjusting an Order(s).
5. If you have specified a Check Amount and have not specified a Check Number, when you press either Preview or Post, MultiPay will give you the opportunity to post a Check Number or skip this entry.

BidPro

County

The County field has been increased to 30 characters.

Email

The email fields in BidPro have been increased to 100 characters.

Overage Customer Number (Version 17.0.1)

The Overage Customer Number has been added to the Additional Information Tab and to the Export to Order Entry Select Overage Screen.

Schedule Pro

Scheduled Jobs

File>Scheduled Jobs

Browse Screen

The ability to edit Order Custom Notes and Internal Notes have been added to the browse screen.

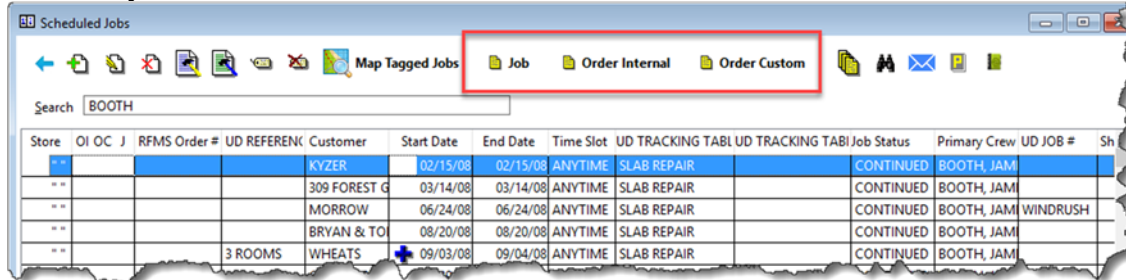


Figure Browse Screen

The ability to click in the far left to tag a job has been added.

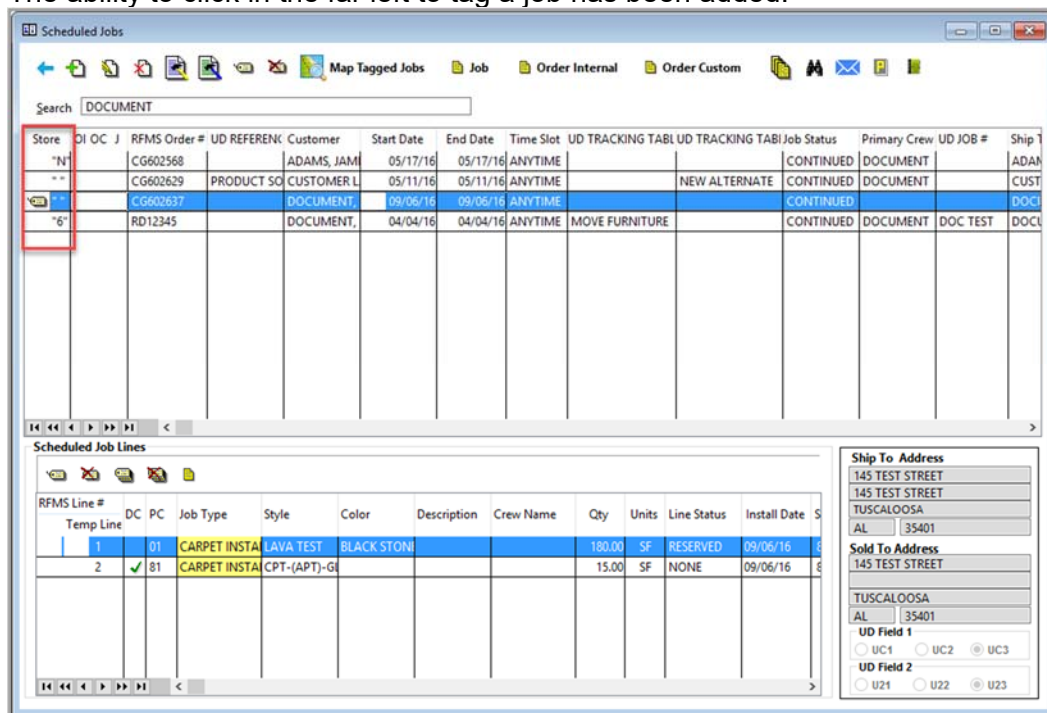


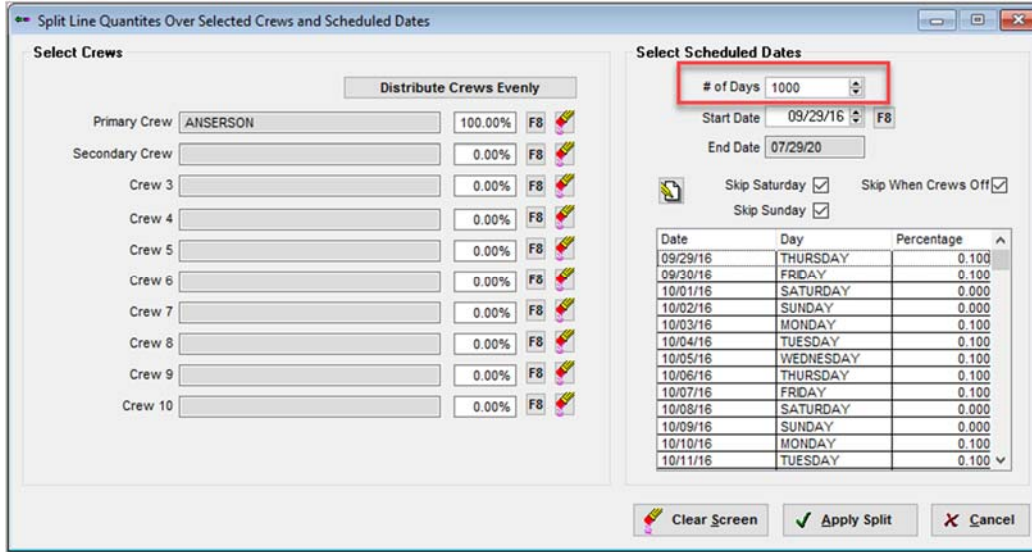
Figure Scheduled Jobs screen

Work Orders

When printing a work order, lines that need to be printed can be selected.

Split Lines

The maximum number of days when splitting lines has been increase to 1000.



Schedule New Jobs

Select Crew

File>Schedule New Jobs>Select Crew>F8

Scheduled Time Slot has been added to the Job Lines Scheduled browse.

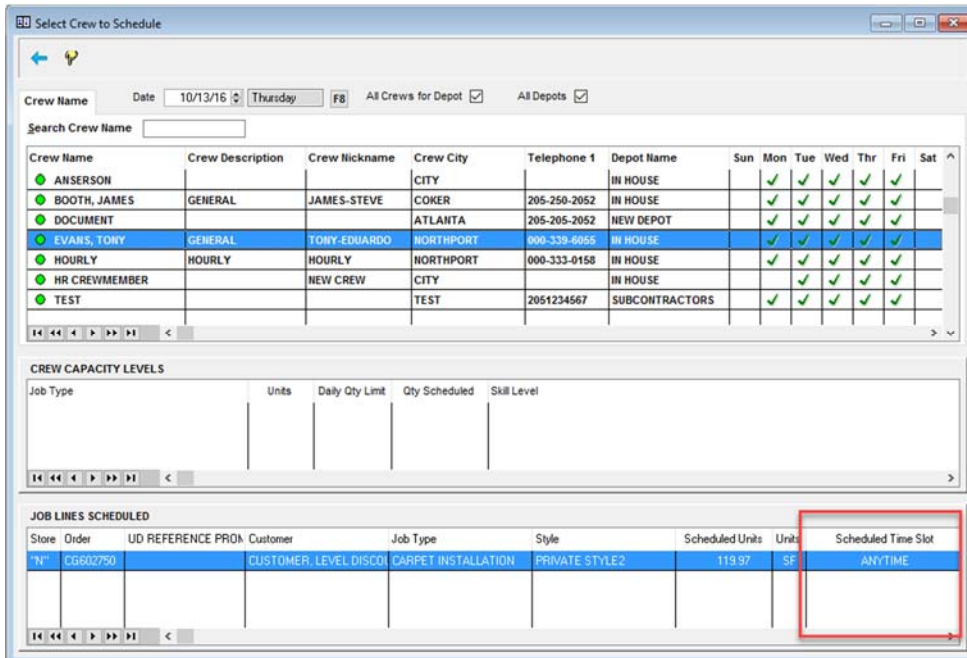


Figure Crew to Schedule screen

Quick Edit (Version 17.0.1)

The ability to sort by Job Status and Store Column has been added to the Browse screen.

Weekly Grid

Temp Job has been added to the grid display when the selected display line is "Order Number or Reference" for jobs not associated with a Customer Order.

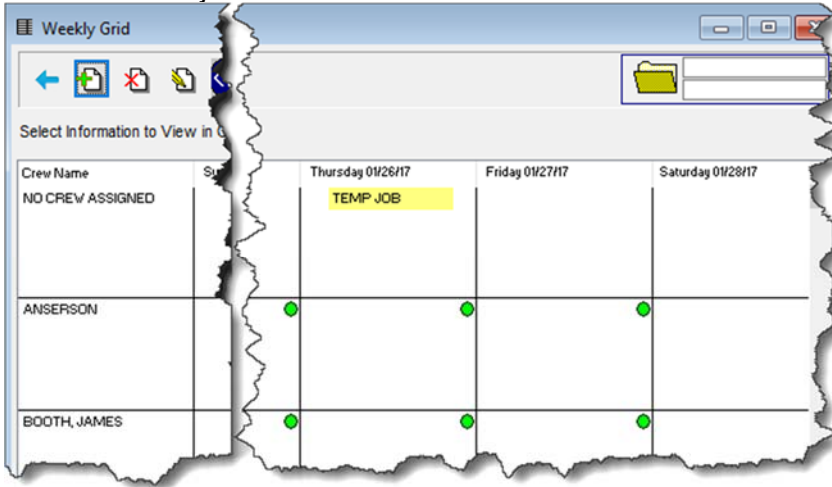


Figure Weekly Grid screen

Alerts

Sorting ability has been added to the **Date Created** and **Time Created** columns.

When on the highlighted line, tagging can only be done on the far left now.

The **Delete Tagged Alerts** icon has been moved over to keep alerts from accidentally being deleted.

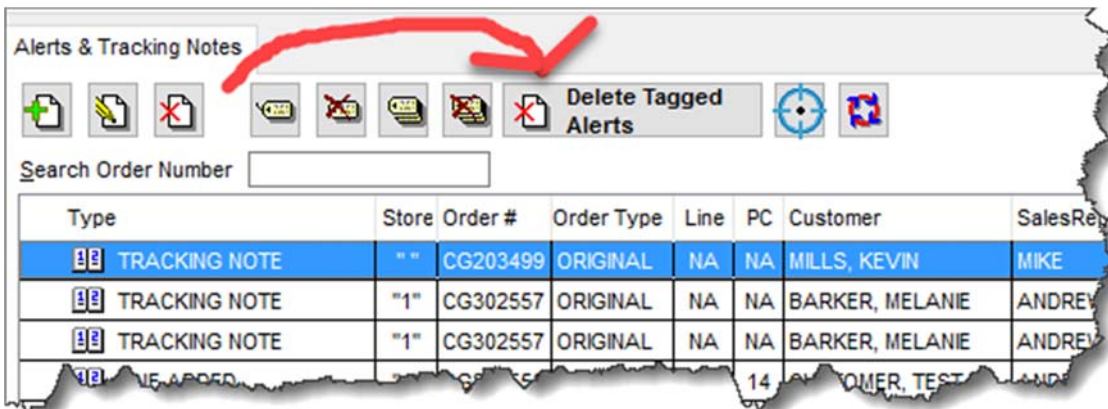


Figure Alert screen

Reports

Total and Analysis Reports

Reports > Total and Analysis Reports

The ability to export Weekly Quantities By Job Type (Portrait) to CSV has been added.

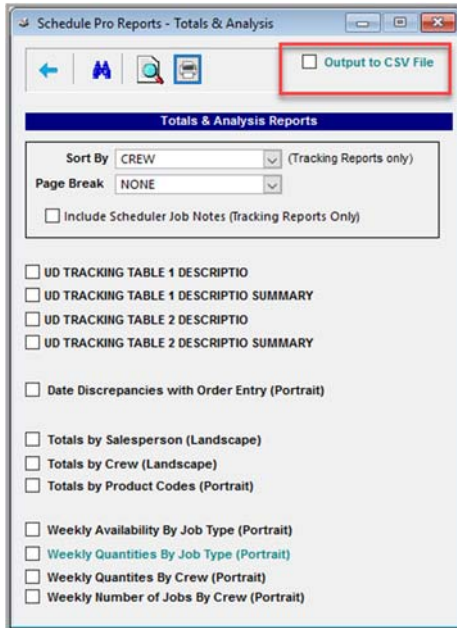


Figure Totals & Analysis screen



Notes:

Reports in **TEAL** are the only one which can be exported to .csv.

Client Management

Sales Leads

When adding a Sales Lead and using F8 to select a customer, the filter will follow the system option [Record Type](#).

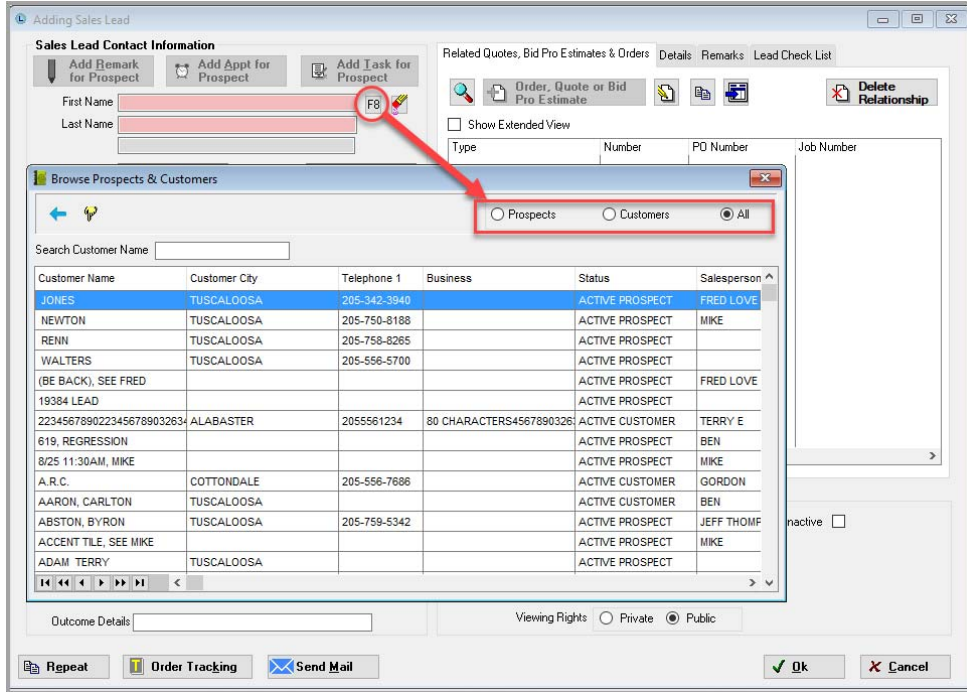


Figure Add Sales Lead Browse Screen

Projects

Site Name has been added to the Customer and Business Name search field on the browse.

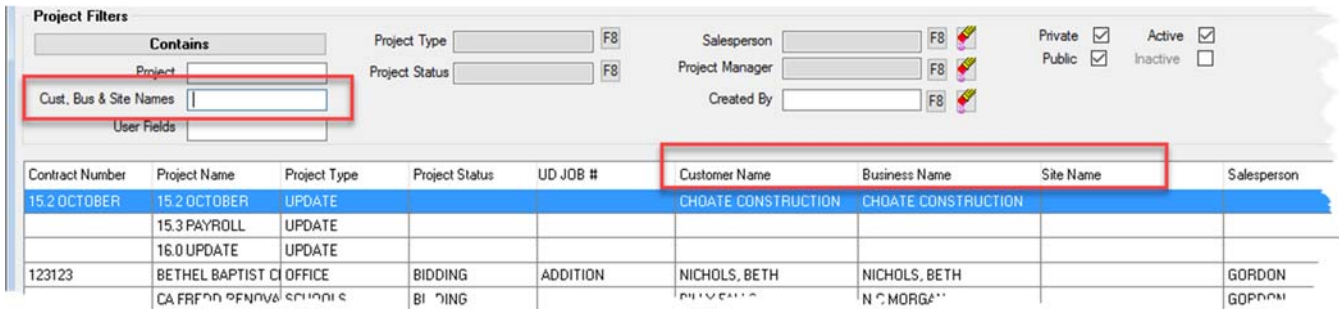
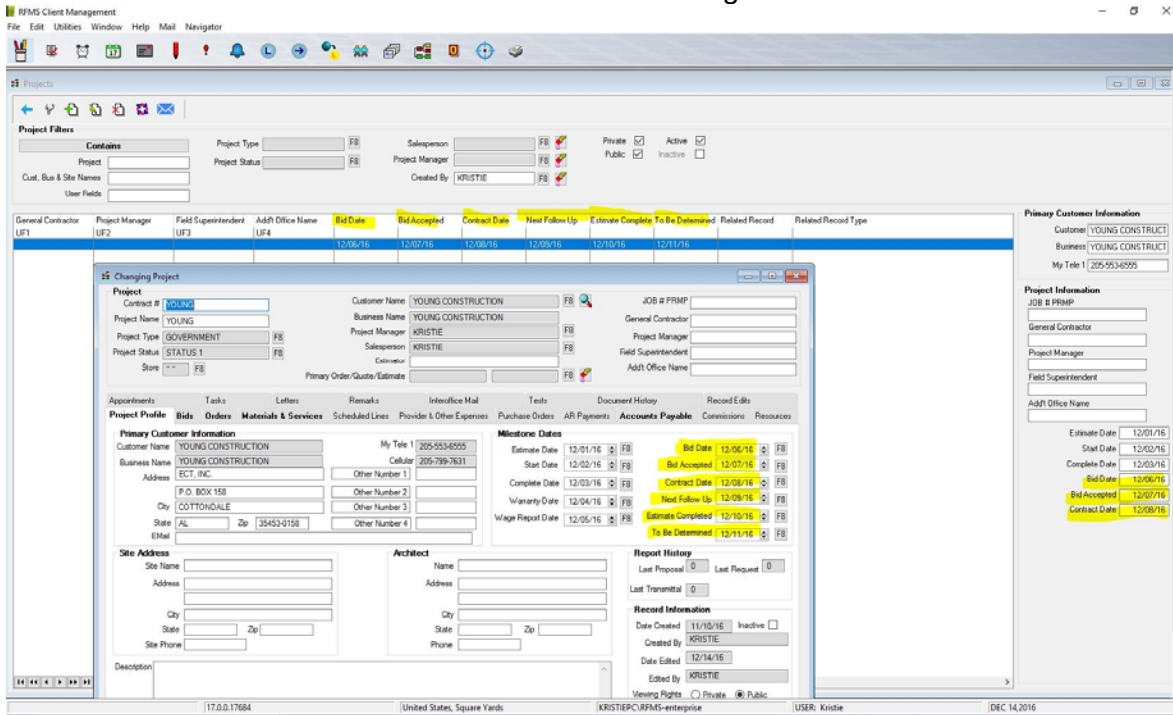


Figure Project Browse Screen

Milestone Dates have been added to columns for sorting.



When adding a new order, quote or BidPro estimate, the Salesperson 2 and the Ship To information will be populated.

When clicking on the Billing Group button, if the highlighted order is already in a billing group, then the billing group will open. If the highlighted order is not already in a billing group, then the option to add it to a new one or an existing one will appear.

Password protection comes from the Order Entry Billing Group button.

Property Connect

Notes (Version 17.0.1)

Special Instructions from Property Connect web orders now appear on BCOE order custom notes.

Installer Pro Mobile

Installer Pro Mobile Users: Please contact the RFMS Business office prior to installing the 17.0 version of RFMS. There is an initial setup required for each RFMS client.

For Version 17.0, Installer Pro Mobile has had numerous updates and improvements. Please click and download the [Installer Pro Mobile User Guide](#) to see all the changes.