



Systems for Success

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

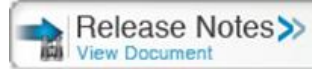
Version 12.2
Update User Guide

Release Date November 2013

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

webpage. Click the release notes button to find these.






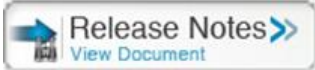
To see what you may have missed in previous updates click here.
































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









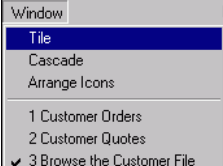




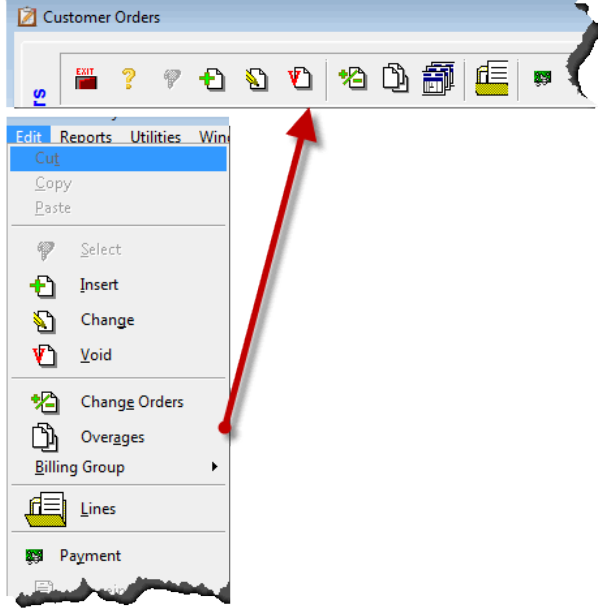
The same documentation is included in the on-line help system and can be accessed by pressing the F1 button at any RFMS screen. If there is something on the screen that you either don't recognize or understand, check this document or refer to the Help Files pressing F1.

Documentation Conventions

 <p>Notes:</p>	Indicates extra Information
	This symbol indicates a best practice, or an example.
<p><u>Setup</u>>System Setup</p>	Indicates Menu item shortcuts: An underlined letter indicates this is a "hot key". On Main menus click the Alt button plus that key to go directly to that field or function. On Drop Down menus just type that key.
<p>Field Name</p>	Indicates a Field Name or button Name
<p>Important</p>	Important information
<p>Screen Shots</p>	To conserve space the screen shots are seldom actual size and may have blank spaces or other non-essential information cropped from them.
	Links to other documents or web pages are included when additional explanations are available. Click the notebook to find that information.
<p>Links to other topics</p>	Various places in this document have links to other topics in the document. To return to the original topic click Alt + left arrow. Try it out with the link to the left!
<p>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="581 1604 1313 1703" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p style="margin: 0;">UD JOB # <input style="width: 100%;" type="text"/></p> <p style="margin: 0;">UD HEADER LABEL 1 <input style="width: 100%;" type="text"/></p> <p style="margin: 0;">UD HEADER LABEL 2 <input style="width: 100%;" 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 and non-graphic files.
	Tag Untag Tagall or Un-tagall record(s). Selects records
	View details of a record.
	Send an email or RFMS mail message regarding the highlighted record.

	View the history of a record.
 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="142 1381 272 1411">Edit Menu</p>	<p data-bbox="391 1058 1214 1087">The Edit Menu can be used as a shortcut to the toolbar options.</p> <p data-bbox="391 1096 483 1125">>Edit></p> 

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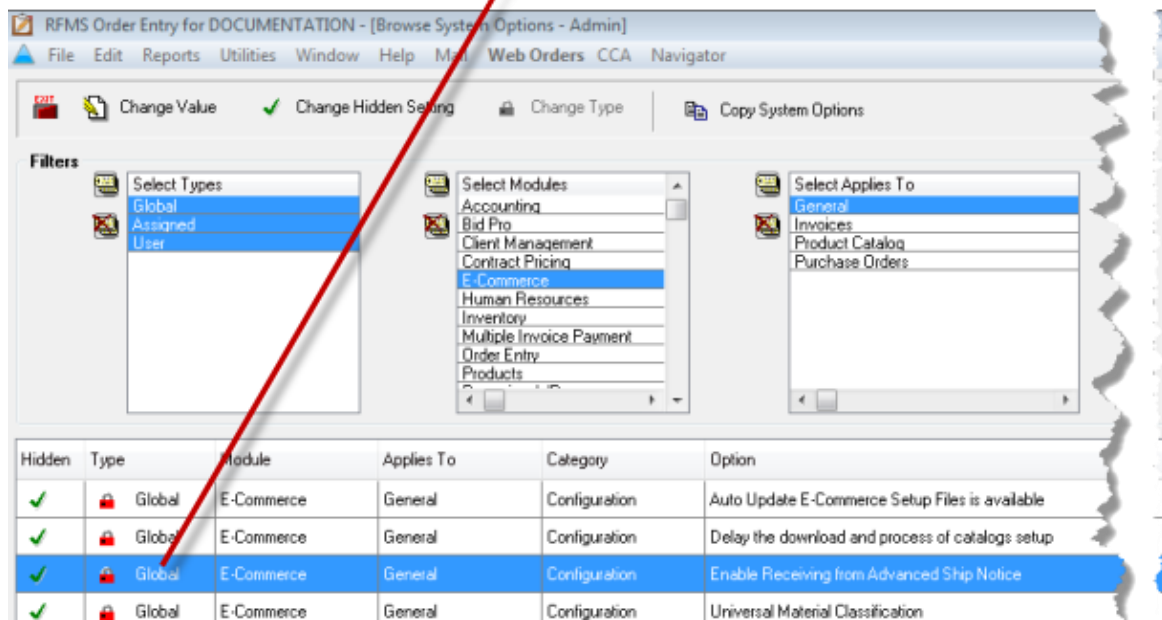
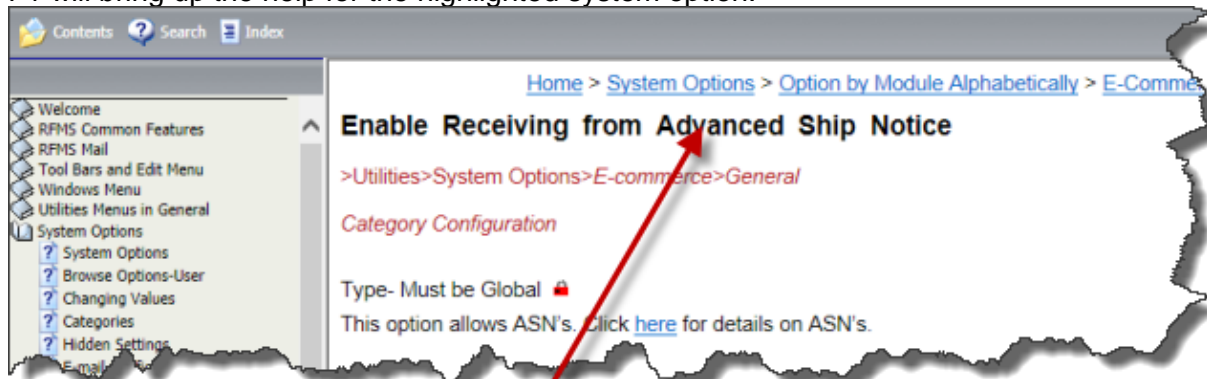
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System Wide

System Option Help Files

There are now help files connected to individual options rather than just by groups of options. Pressing F1 will bring up the help for the highlighted system option.



New System Options

Copy System Options

X (Module)>Utilities>System Options>Admin System Options>Copy System Options

The ability has been added to tag all when copying system options from one user to other users.

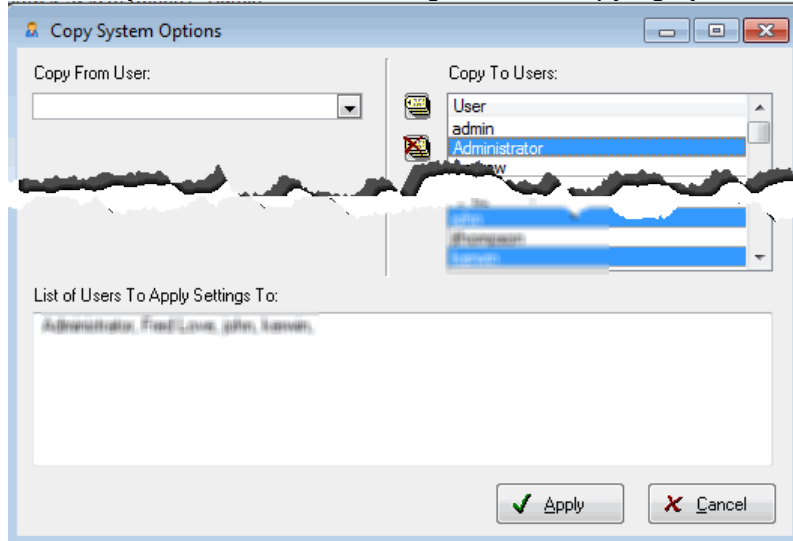


Figure Copy System Options

Use Customer Pick Up

X (Module)>Utilities>System Options>Inventory>Use Customer Pickup

Type- Must be Global

The ability to have a client sign the picking ticket electronically and save that signature to Order Entry is enabled when Yes is chosen.

[See details about Customer Pickup](#)

Databases to View Inventory From

X (Module)>Utilities>System Options>Order Entry>Inventory>Databases to View Inventory From

Type-Can be Global, Assigned, or User

This feature allows the user to view Inventory in other databases on the same server but not the same copy of RFMS. It can be used in both Roll Inventory and Item Inventory

[See details about Roll and Item Inventory-Viewing Inventory from Other Databases](#)

Allow edit of Job Number after Job Costing

X (Module)>Utilities>System Options>Order Entry>Order Entry> Allow edit of Job Number after Job Costing

Type-Can be Global, Assigned or User

An option has been added to allow the user defined field job number to be edited after job costing. As this field is used on many reports it is suggested that if this information is not available at job costing a value such as need info be entered so that wrong information will not be permanently kept on the order.

Type	Module	Applies To	Category	Option	Value
Global	Order Entry	Order Entry	Configuration	Allow edit of Job Number after Job Costing	No

Job number is the user definable field on the customer order header.

Warn User if Order Line does not foot

X (Module)>Utilities>System Options>Order Entry>Order Entry>Warn User if Order Line does not foot: Qty x Price <> Line Total

Type-Can be Global, Assigned or User

With the update released on 6/27/2013, a message was added to warn users if the produced line total did not appear to equal their Quantity x Price. Some clients accept that this is just a result of rounding and do not want to be notified when this happens. An option has been added to the system so that clients can choose to be or not to be notified.

Type	Module	Applies To	Category	Option	Value
Global	Order Entry	Order Entry	Warning Messages	Warn User if Order Line does not foot: Qty x Price <> Line Total	Yes

Workstation Specific Tag Printing Only (Products and Inventory)

X (Module)>Utilities>System Options>Products>Products>Workstation Specific Tag Printing Only or X (Module)>Utilities>System Options>Inventory>Inventory>Workstation Specific Tag Printing Only

Category Configuration

Type- Can be Global, Assigned or Use

Yes means only the user that tags the record can print the record.

Consolidation to a Negative Inventory Record

X (Module)>Utilities>System Options>Inventory>Costing/Receiving>Consolidation to a Negative Inventory Record

This option allows consolidation to a negative record. It is still set to not allow consolidation to zero.



Notes:

This option will only be enabled if "Allow Item Consolidation During Receiving/Costing" is enabled.

Populate Hours from Job into Providers Regular Time Field

X (Module)>Utilities>System Options>Schedule Pro>Providers>Populate Hours from Job into Providers Regular Time Field

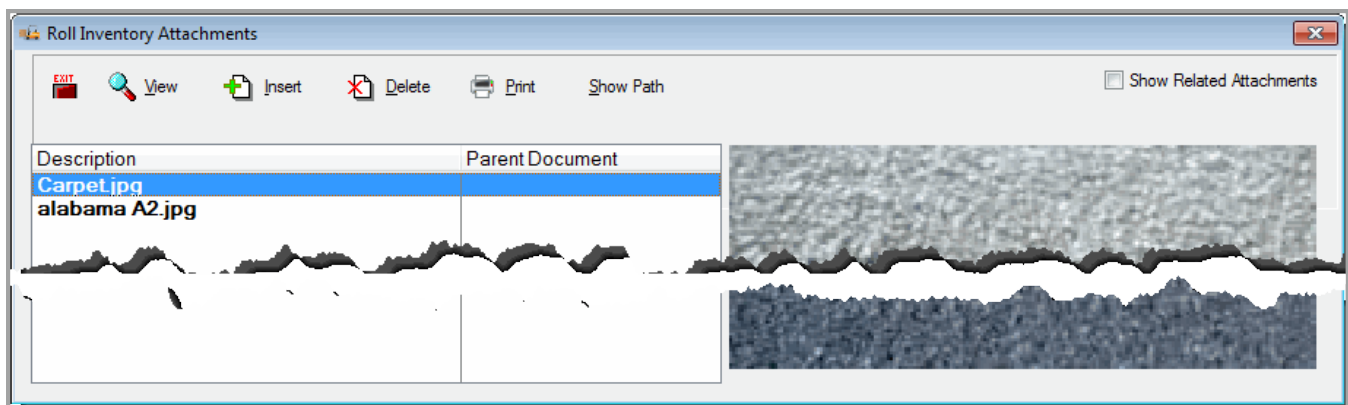
Type-Must be Global

If option is set to Yes, when creating provider records the hours from the job are populated into the regular time field in the provider record.

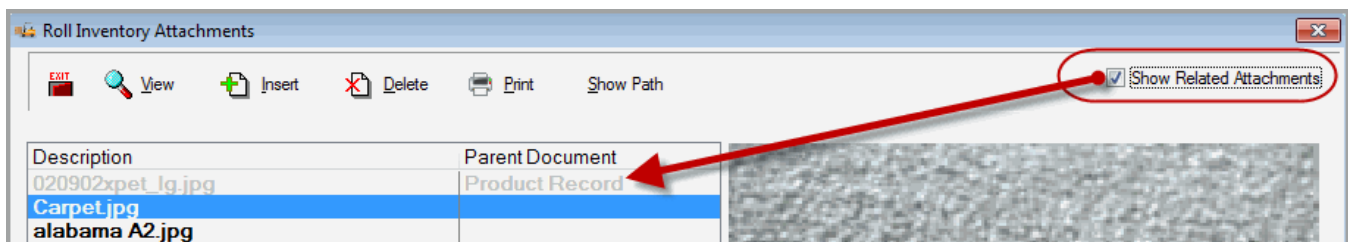
[See details about Populate Hours from Job into Providers Regular Time Field](#)

Attachments

Attachments are now displayed in a browse list rather than scrolling one by one. Highlight an attachment in the list to preview.



Click the show related attachments box to view attachments from other files which are related to the current record. For example, attachments for the product record which is related to an inventory record.



Attachments can be printed without store information. This will print the attachment as a larger image.

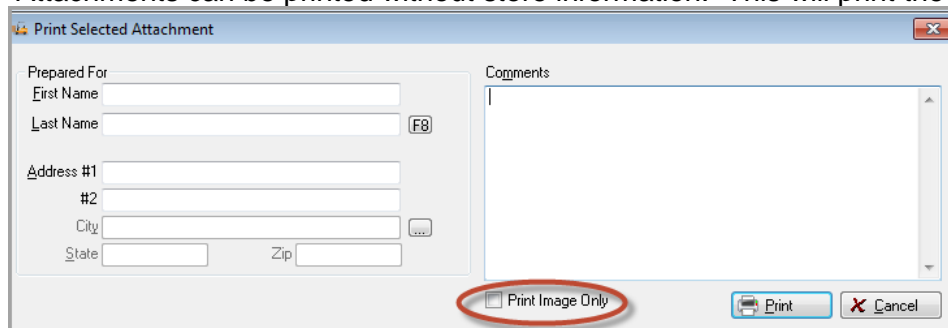


Figure Attachment Print Screen

Attachments must be open to print.

Emailing from RFMS

The ability has been added to add up to 5 attachments when using SMTP email.

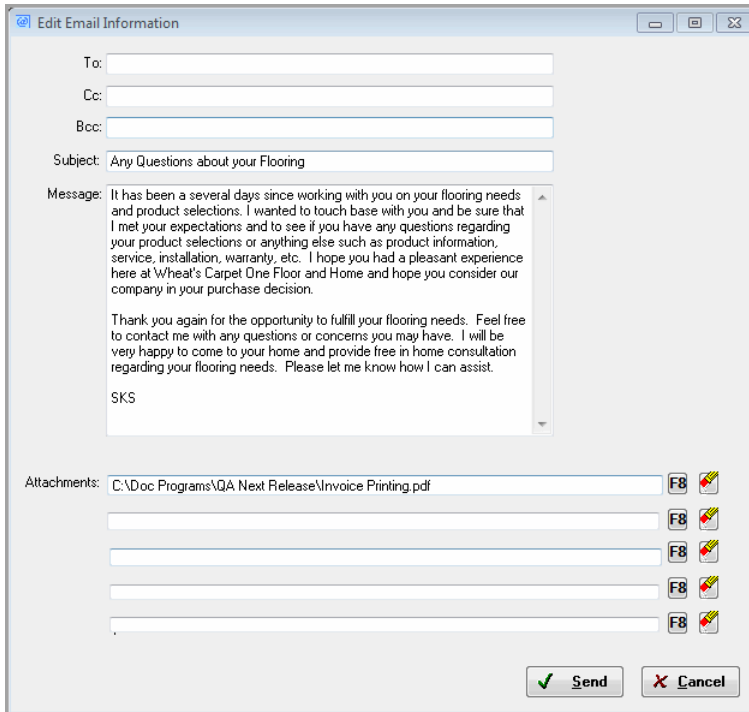


Figure SMTP Email with Attachments

Order Entry

Billing Groups

Order Entry>File>Customer Orders  (Billing Group Button)

New Billings Groups will display the Billing Group Number in the Project Number field. The information in this field can still be edited.

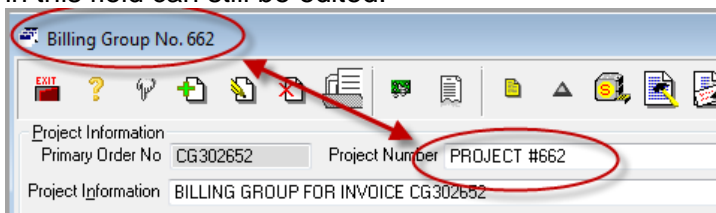


Figure Billing Group/Project Number

Customer Orders

The location of inventory is now displayed in Browse Order Lines and in the Edit Order. Use the Scroll to get to the Location column.

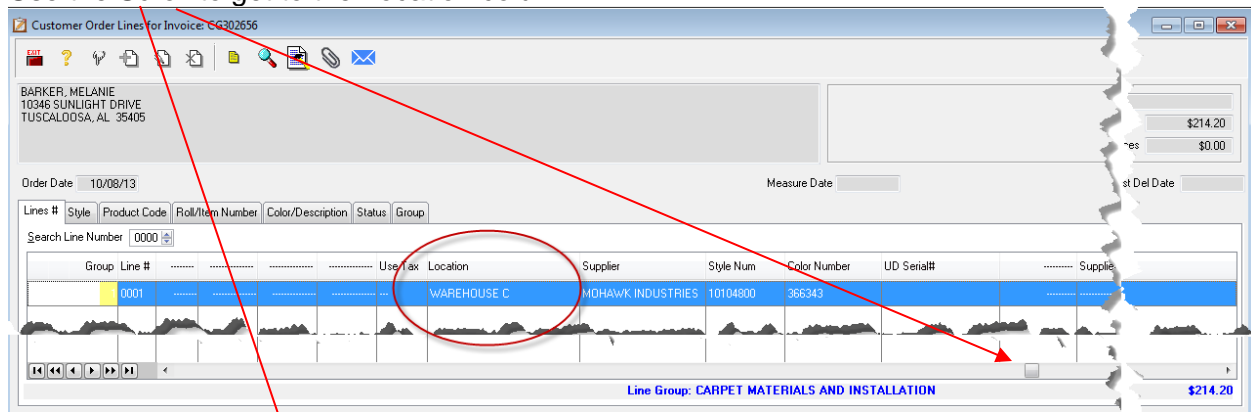


Figure View Lines Screen

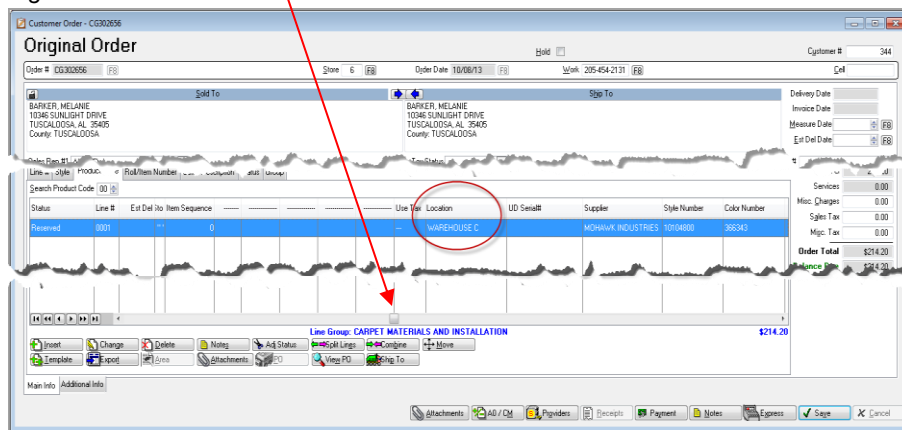


Figure Edit Order Screen

Customer Order Additional Info Tab now displays a contact name if the Contact #1 is on the imported Customer record. To have this information on current orders, the customer information will need to be reimported.

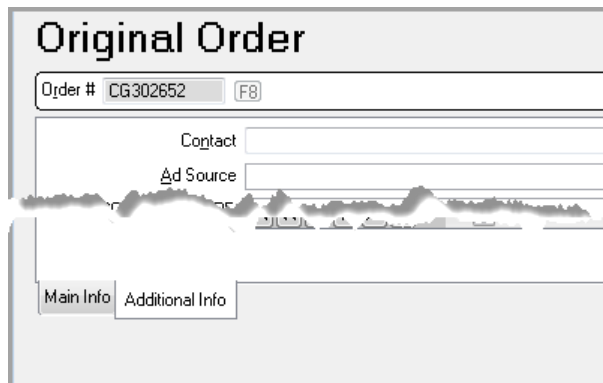


Figure Additional Info Screen


Customer Pickup

This feature gives the ability to have a client sign an electronic document and save that signature in Order Entry.

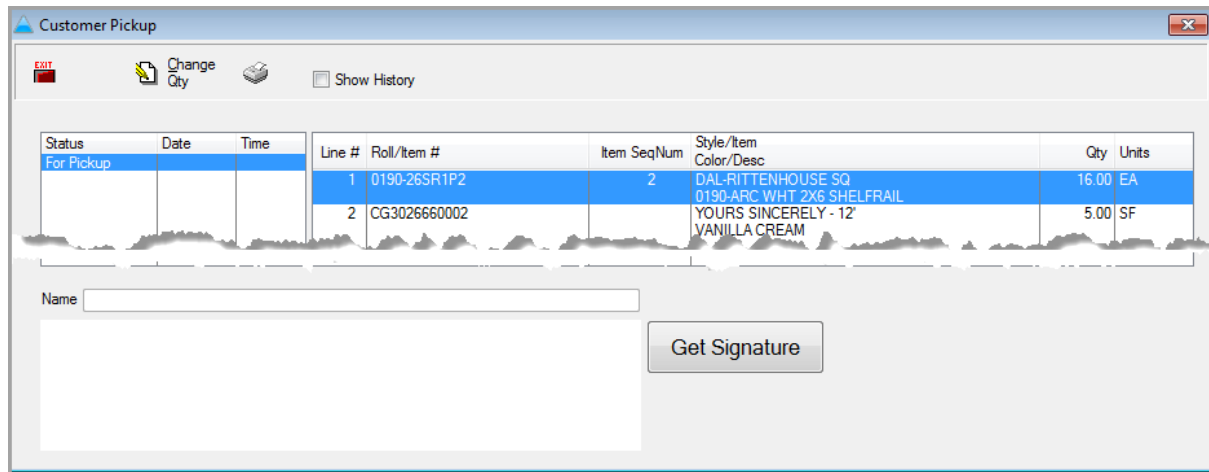
This feature must be enabled with the system option *X>Utilities>System Options>Order Entry>Inventory>Use Customer Pickup*

First print a picking ticket, only lines in a cut status will be sent to a pick up record. These lines will be delivered as normal.



Click the  Customer Pickup button to view the pickup records. The Customer Pickup Screen will appear.

By default the records for pick up will be show.



The screenshot shows the 'Customer Pickup' window. At the top, there are buttons for 'EXIT', 'Change Qty', and a printer icon, along with a 'Show History' checkbox. Below this is a table with columns: Status, Date, Time, Line #, Roll/Item #, Item SeqNum, Style/Item Color/Desc, Qty, and Units. The table contains two rows of data. Below the table is a 'Name' input field and a 'Get Signature' button.

Status	Date	Time	Line #	Roll/Item #	Item SeqNum	Style/Item Color/Desc	Qty	Units
For Pickup			1	0190-26SR1P2	2	DAL-RITTENHOUSE SQ D190-ARC WHT 2X6 SHELFRAIL	16.00	EA
			2	CG3026660002		YOURS SINCERELY - 12' VANILLA CREAM	5.00	SF

Figure Customer Pickup Screen

Click Get Signature. Make sure the client's name is typed in the name box. Have the client sign the signature pad.

Click Save Signature. The signed Pickup Document will print.

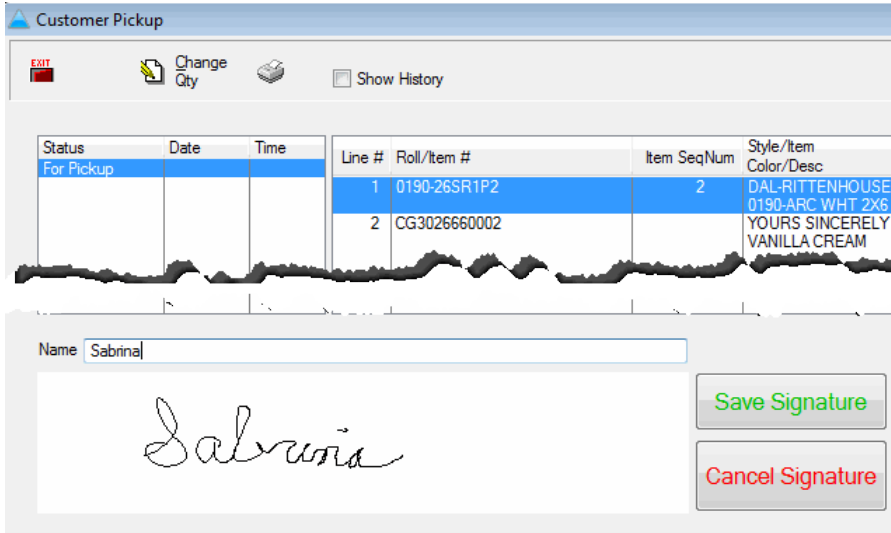


Figure Customer Pickup Signature Screen

If some or all of the material is not going to be picked up at the time, edit the quantity down to the amount actually being picked up and complete the get signature step. A pickup record will be created and the amount not picked up will move to a “for pickup” record

Check the Show History box to show all pickups. Highlight the pickup you would like to see and the box shows the materials and the signature for that pickup. Click the printer button to reprint the pickup document.

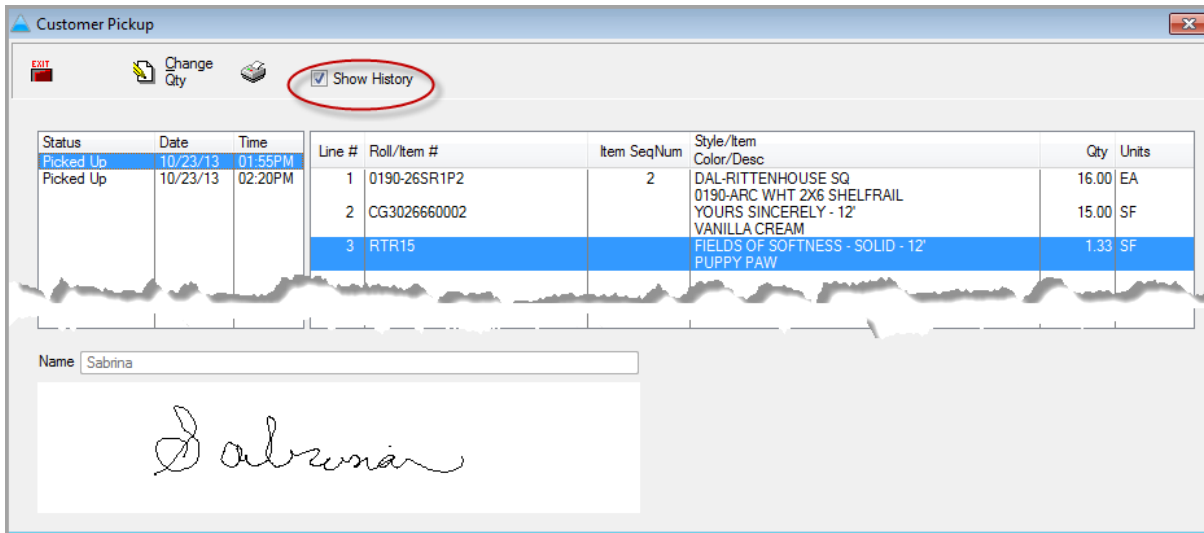


Figure Customer Pickup Show History



Notes:

This feature is compatible with Topaz System signature pads available from many office supply vendors. Topaz file will need to be installed on each machine using the signature pad. Directions for installing these files will be included with the signature pad.

Work Order



Click the Printer Button >Click the Work Order button or File>Customer Orders>Edit>Print>Work Order

Area field text wraps so Work Order is easier to read.

10/23/13 4:43PM STORE 6 ADDRESS 1 TUSCALOOSA, AL 34758 Telephone: 205-943-2282 Fax: 205-943-2283 Page 1

WORK ORDER

Area	PC Style/Item	Color/Description	Inventory #	Units	Width	Length	Ship Wt.	Quantity	Control #
	82 VIN-BASIC-FREE INSTALLATION ON DEC 2012 PURCHASE		VBFD2012	SF				10.00	M1L480LABA
	CARPET #2-THIS FIELD WILL WRAP SO EASY TO READ	06 DAL-RITTENHOUSE SQ 0190-ARC WHT 2X8 SHELFRAIL	0190-28SR1P2	EA	0'0"	0'0"		32.00	24W00W908H
	THIS AREA WILL WRAP SO THAT IT IS EASY TO READ	01 YOURS SINCERELY - 12' VANILLA CREAM	CG3022660002	SF	12'0"	15'0"		180.00	M1000I6R8T
	THIS FIELD'S TEXT WRAPS MAKING IT EASY TO READ	01 FIELDS OF SOFTNESS - PUPPY PAW SOLID - 12'	RTR15	SF	12'0"	1'0"		12.00	G8T0T8T8X

Figure Work Order Preview

Print Delivery Ticket



Click the Printer Button >Click the Delivery Ticket button or File>Customer Orders>Edit>Print>Delivery Ticket

The ability to print a Delivery Ticket was added for Non-ERRM users. It will only print delivered lines.

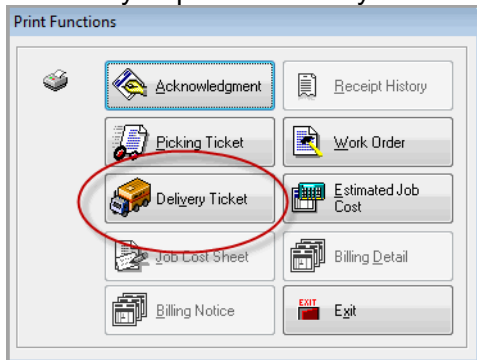


Figure Order Print Functions

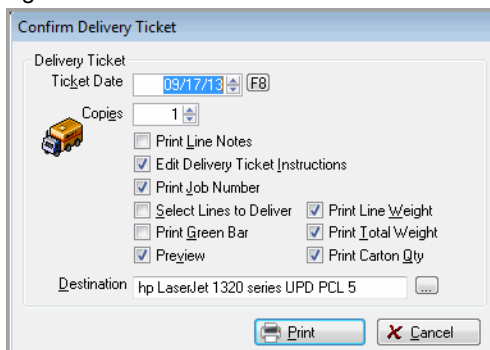


Figure Confirm Delivery Ticket

Page 1
09/17/13
4:27PM

Delivery Ticket
 For: 09/17/13

Sold To CENTURY 21, ATTY SNELL & ASSOC 2001 SKYLAND BLVD E, C-3 TUSCALOOSA, AL 35405	Ship To CENTURY 21, ATTY SNELL & ASSOC 2001 SKYLAND BLVD E, C-3 TUSCALOOSA, AL 35405	Invoice CG302549
--	--	----------------------------

Customer Purchase Order: _____ Work : 205-553-6858
 Sales Representative: BEN

Code	Roll/Item No.	Width	Amount	Units	Location	Store	Sign
*Line #0001	WELCOME MAT/CANCER AWARENESS						
03	WELCOMEMAT		1.00	EA		***	
*Line #0002	CARPET REMNANT/TAN						
18	WT1167867G		1.00	EA		***	
UD Serial#: 10 X 3.75							

Total Shipping Weight: 0.

Delivery Ticket Instructions _____

Figure Delivery Ticket Preview

Order Browse



Edit>Find or Find button

Browse Orders has added ability to find by Close Date for ERRM users.

Job costing in non-ERRM creates the delivery date and close date. ERRM has an additional step in processing customer orders. The delivery date is created before job costing and job costing creates a close date.

Figure Customer Orders Browse Screen

Quotes

Return Samples without having to scan a barcode

Order Entry>File>Quotes>Edit>Return Samples or

Order Entry>File>Quotes>Return Samples button



Samples for the highlighted quote can now be returned without a bar code by using the Return Samples option or button. Samples can be selected for individual or multiple returns.

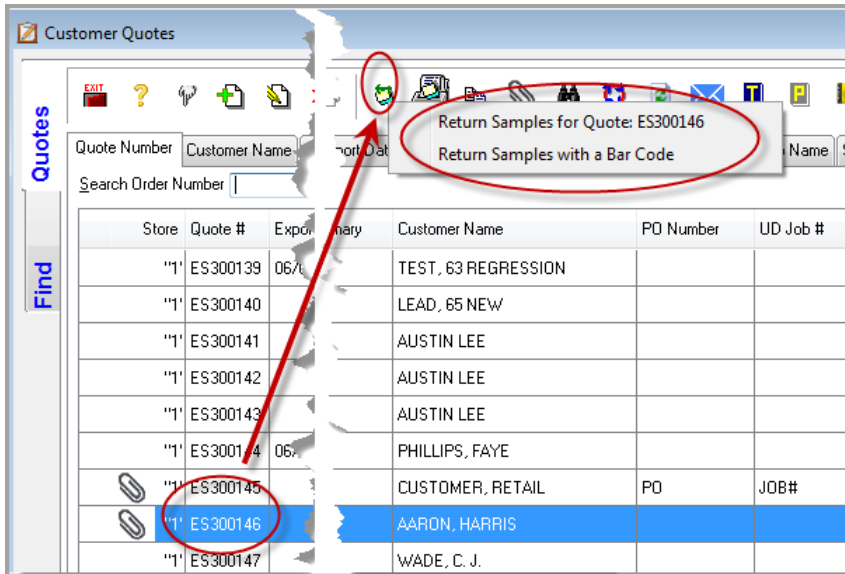


Figure Return Samples for Quote

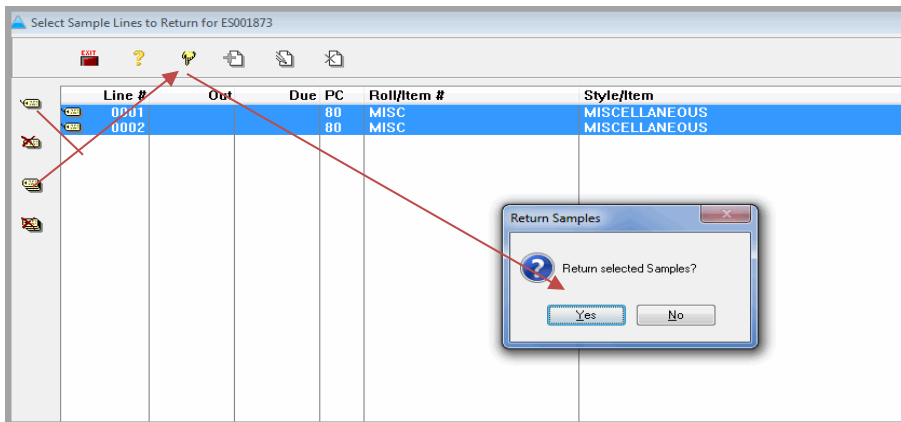


Figure Select Samples Screen

Sample Status Report

Order Entry>File>Quotes>Edit>Print Samples Statuses or

Order Entry>File>Quotes>Print Sample Status Report button



The Sample Status Report can now be filtered by Due Date and Check Out Date.

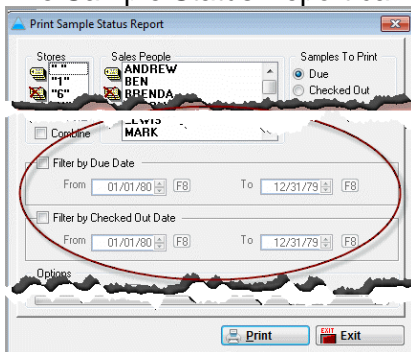


Figure Print Sample Status Report

Claims

File>Claims>Edit>Print Claim Documents>Claim>Print or *File>Claims>Print>Claim>Print*
 Carton quantity and weight now appears on the claim. Custom claims will need to be reconfigured to add this information.

STORE 6
 ADDRESS 1
 TUSCALOOSA, AL 34758
 Telephone: 205-943-2282 Fax: 205-943-2283

Page 1
 CL300005

CLAIM

Sold To: TEST FOR REVIEW
 Ship To: OSWALT CONSTRUCTION
 18436 OLD MOORES BRIDGE ROAD
 AL 35004

Inventory	Style/Item	Color/Description	Quantity Units	Price	Extension
CG-HEAR	HEARLAND - 3/4" x 1/4" x 1/4" Weight: 0.00 oz Carton Qty: 1.00	HAZELNUT	19.80SF	2.77	54.85

Figure Claim Preview

Customer

File>Customers
 Contact #1 and Contact #2 now appear on the Customer browse.

AARON HARRIS
 ADVANTAGE REALTY
 ALFA INSURANCE, ATTN: D HANK
 AMASON AND ASSOCIATES
 AMERICAN CHOICE REAL ESTAT
 ANDERSON MGMT. CO.
 APLIN, GORDON
 ARGO, AARON
 ATTN: ACCOUNTS PAYABLE, CIT
 BAMA CONSTRUCTION CO. LLC
 BAMBARGER, MR.

DOB: [F8]
 Ship Via: [F8]
 Contact #1: AARON HARRIS
 Contact #2: APEX ROOFING AND CONSTRUCTION
 Mailings Allowed
 Print Invoice when Batch Job Costing

Export EDI: NONE

Ship To: AARON HARRIS
 225 30TH AVE E
 TUSCALOOSA, AL 35404

Work: 205-553-0270 Ext: [F8]
 Cell: [F8]
 Fax: [F8]
 Bus. License #: [F8]
 Customer #: 1,311
 Customer Type: REPAIR
 Contact #1: AARON HARRIS
 Contact #2: APEX ROOFING AND CONSTRUCTIO
 Active

Figure Contact in Customer Browse

A change status button has been added. It can be password protected Order Entry.

Changing Prospect or Customer

Sold To: Salutation [F8], First Name, Last Name: A.E. SANDERS CONSTRUCTION, INC., Business Address: 119 IRBY BLVD., City: GASDEN, State: AL, Zip: 35904, Country [Copy]

Ship To: Salutation, First Name, Last Name, Business Address, City, State, Zip, Country [Copy]

Relationship: Relationship: UD Main, UD Branch(s)

Record Information: Created By [F8], Edited By: 07/19/13, Viewing: Private, Public, Active, Change Status

Contact Info: Contact 1, Work: 256-547-4916, Home, Other, L/U Affiliation, Marital status, Licenses

Switch to Customer, Attachments, Send Mail, View All Notes, View Customer Notes, Ok, Cancel

Figure Changing Prospect or Customer

Roll and Item Inventory-Viewing Inventory from Other Databases



Order Entry>File>Roll Inventory>  *or Order Entry>File>Item Inventory>* 

This feature allows the user to view Inventory in other databases on the same server but not in the same copy of RFMS. It can be used in both Roll Inventory and Item Inventory.

The databases the user is allowed to view are set up in system options.

X (Module)>Utilities>System Options>Order Entry>Inventory>Databases to View Inventory From Category-Default Filters

Type- Can be Global, Assigned or User

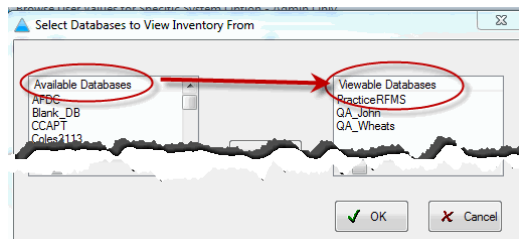


Figure Database Selection

The user can ONLY view from this screen. Notice the only options are Find and Reset.

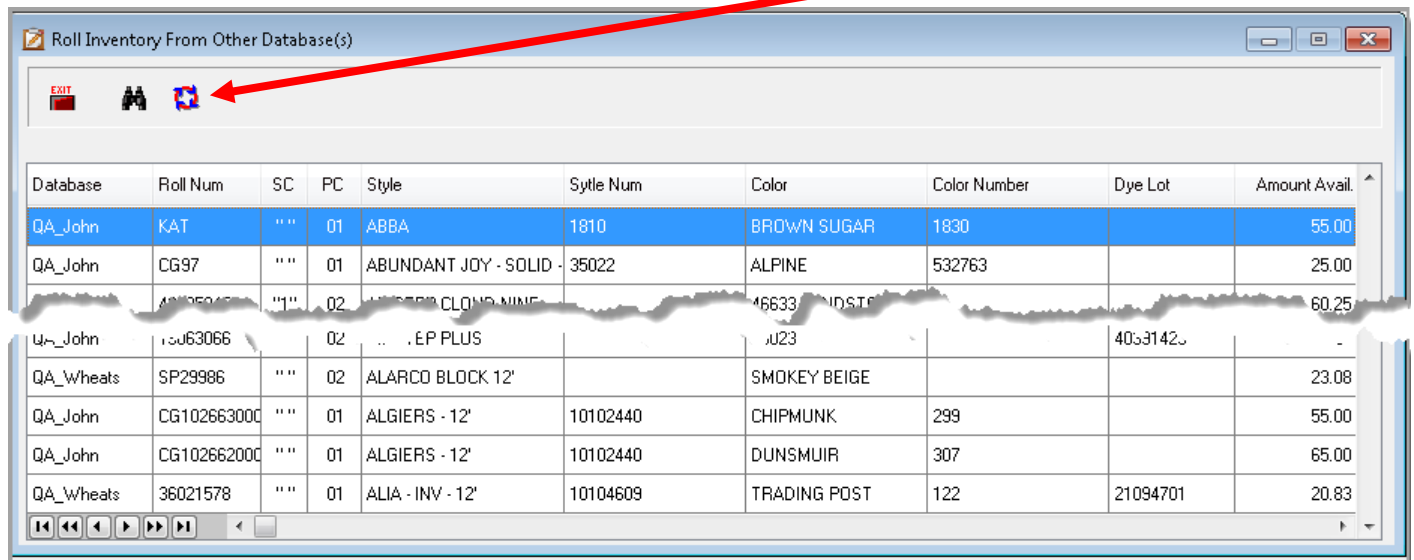


Figure View Inventory from Other Databases.

Roll Inventory

File > Roll Inventory  Find

The ability to search by Color Number has been added.

Figure Find Inventory

Products

Order Entry > File > Products > Rolls or Items  Find

Products without a price can now be filtered out of the product search. First, the user must be allowed to hide/unhide the product that doesn't list a price.

Type	Module	Applies To	Category	Option	Value	Note
Assigned	Order Entry	Products	Default Filters	Hide Products with no prices	No	
Assigned	Order Entry	Products	Default Filters	Allow user to hide/unhide products with no prices in filter	No	Depends on the "Hide Products with no prices" Setting

Figure Admin Screen-Hiding No Price Products

Then, the user can check or uncheck the box in the filter. Services are not affected.

Figure Product Filter

Products

Attachments

Products>File>Rolls or Items

Attachments can be added to the main record and the color record. Each must be added separately.

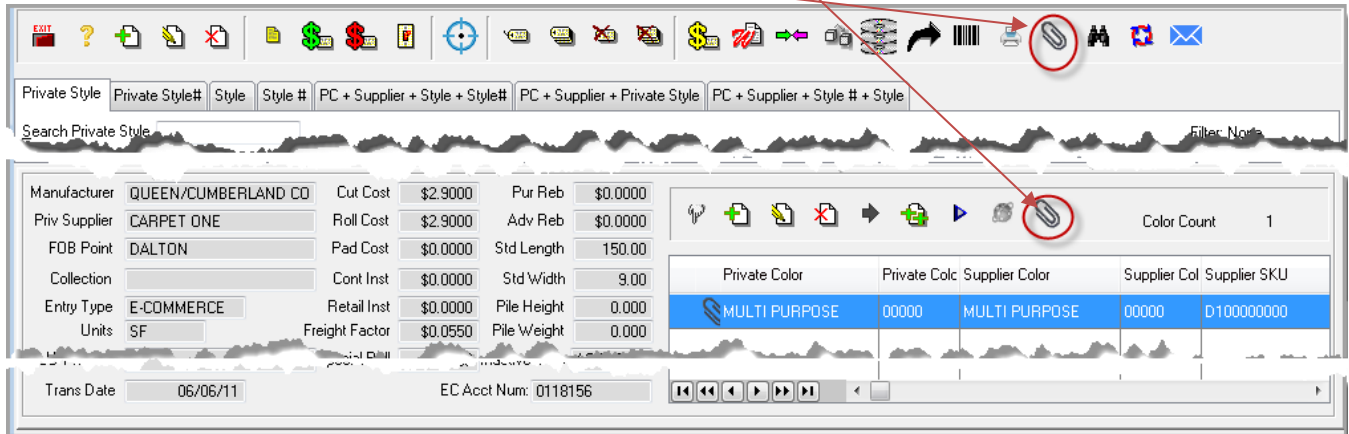


Figure Product Attachments

Inventory

Attachments

Attachments can now be viewed from roll and item inventory.

Purchase Orders

File>Purchase Order>Edit>Print or File>Purchase Order>  Print

When Custom Print POs and Print Listing Report is selected, a CSV is created. Fields for Collection, Private Collection, Amount Received, and Manufacturer have been added in this release.

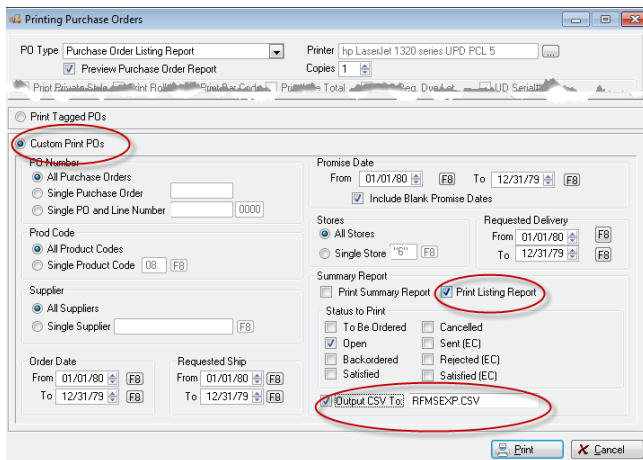


Figure Custom Print POs

P	Q	V	W	X	Y	Z	AA	AB
Order Dat	Status	Ordr	Color Nun	Private Cc	Collection	Priv Collection	Amount Received	Manufacturer
20131007	Satisfied	A	62	62			17.6	MHK WOOD

Figure Custom Print POs CSV

Roll Inventory/Item Inventory Records

File>Roll Inventory or File>Item Inventory

When the cost is changed on an inventory record, a new record is created with the new cost and available inventory. A new tag is not needed since the old record is linked to the new record.

Barcoded Inventory

Tabs

Tabs have been added to allow searching for specific records on the reconciliation screen. The search will locate the closest record in the column that matches the tab.

Gross Cost, System Value, Physical Value, Item Sequence number, and the Difference have been added to the CSV output Inventory Reconciliation Reports.

Product Code	Item Number	Item Name	Item Desc	System Available	System Reserve	System Qt	Physical C	Status	Store	System Ref Numbe	Item Seq I	Gross Cost	System Valu	Physical V	Difference Value
6	27746	CONTINENTA	MOROCCA	0	0	0	50	Qty. Error	" "	45334	2	5.475	0	273.75	-273.75
7.303 - 34 - 2		BEAUMONT F	SADDLE	0	2232	2232	125	Qty. Error	" "	45160	3	2.19	4888.08	273.75	4614.32

Item Reconciliation

File > Barcoded Inventory > Barcoded Items

Location and Lading number have been added to the screen and the CSV.

Pr Code	Item Number	Seq #	Item Store	System Reference	Location	Lading Number	Scanned S
11	#28 MG-6	2	#28	45,369		04-454286	
18	00047982	1	CAP	41,649		BL320410000	
06	00300	4	BEJ	31,477		731638	

Figure Barcoded Item Inventory

A	B	P	Q	R	S
Product C	Item Num	Item	Difference	Location	Lading Number
11	#28 MG-6		0		04-454286
18	47982		0		BL3204100006
06	300		0		731638

Figure Barcoded Item Inventory CSV

Inventory Move

Requested Inventory Move Report

Requested Inventory Move now uses the Inventory Move Custom Report to track the requested inventory.

Trans #	Status	From Store	To Store	PC	Roll/Item #	Width	Length	Quantity	Units	Date Moved	D
1008	In-Transit	"	"6"	01	10194204A	12.00	15.00	180.00	SF	10/23/13	
1009	In-Transit	"	"6"	01	16846597A	12.00	12.00	144.00	SF	10/23/13	
1010	In-Transit	"	"6"	06	0060048	0.00	0.00	1.00	EA	10/24/13	
1012	In-Transit	"	"6"	06	0060048	0.00	0.00	2.00	EA	10/28/13	
1013	In-Transit	"	"6"	01	10194204BA	12.00	15.00	180.00	SF	10/28/13	
1014	In-Transit	"	"1"	18	0037255	12.00	35.83	1.00	EACH	10/28/13	
1015	In-Transit	"	"6"	06	0060048	0.00	0.00	3.00	EA	10/28/13	
1016	In-Transit	"	"6"	01	CG49A	12.00	5.00	60.00	SF	10/28/13	

Figure Receive Moved Inventory Screen

Figure Inventory Move Report Screen

Inventory Move Summary Report										
Sorted By: Origin Store + Destination Store										
Origin	Destination	Trans #	Roll/Item #	Product Code	Shilitem Color/Desc	Date Moved	Date Recv	New Bin Location	Width Length	Quantity
In-Transit	**	**	1014	003725S	JOURNEY - SOLID - 12	10/28/13			12.00	1.00 EACH
Notes: 08 HWG SUR 39.83										
In-Transit	**	**	100E	10194204A	WINDFALL - J & J	10/23/13			12.00	180.00 SF
Notes: 01 1416 CASH COW 15.00										
In-Transit	**	**	100E	16846597A	AFTER DUSK	10/23/13			12.00	144.00 SF
Notes: 01 ZEBRA STRIPES 12.00										
In-Transit	**	**	101C	006004B	THINSET *MPEI	10/24/13			0.00	1.00 EA
Notes: 06 ULTRAFLEX 1 GREY (50) 0.00										
In-Transit	**	**	1012	006004B	THINSET *MPEI	10/28/13			0.00	2.00 EA
Notes: 06 ULTRAFLEX 1 GREY (50) 0.00										
In-Transit	**	**	1012	10194204BA	WINDFALL - J & J	10/28/13			12.00	180.00 SF
Notes: 01 1416 CASH COW 15.00										

Figure Preview of Inventory Move Summary Report

Inventory Adjustment Report

File>Reports>Inventory Adjustment Report

Adjustment Types are listed on report and CSV.

DOCUMENTATION						
Inventory Adjustments						
From 01/01/13 To 12/31/79						
Store Location " "						
Adj Date	Supplier	A/P Invoice Number	Adjustment Type	Product Code	Style/Item Color/Description	
01/10/13	THE R.A. SIEGEL COMP	196307	AVAILABLE ADJUST *REPLACEMENT	08 (SUPPLIES)	SEAM SEALER-MANNINGTON LOW GLOSS URETHANE	
01/11/13	UNIQUE BLDG CONCEPTS	57704	AVAILABLE ADJUST *REPLACEMENT	06 (CERAMIC)	FAULT LINE COLLECTION CASCADIA	
01/11/13	UNIQUE BLDG CONCEPTS	56519	AVAILABLE ADJUST *REPLACEMENT	06 (CERAMIC)	ENGLISH COTTAGE 5/8X1	
01/14/13	GE CAPITAL	0002855	AVAILABLE ADJUST *REPLACEMENT	07 (HARDWOOD)	SIERRA PLANK - 3/8" X 5" BROWN BEAN-HICKORY-HANDSCRAPED	
01/14/13	SOUTHERN WHOLESALE	656917, 921	AVAILABLE ADJUST *REPLACEMENT	07 (HARDWOOD)	SANDING DISKS-16"	

Figure Preview of Inventory Adjustment Report

Accounting

A/R Aging Report

Accounting > Accounts Receivable > Aging Report

A sort was added for Main/Branch. When this sort is selected the Starting Name field changes to "Main OR Branch" and the Ending Name Field is removed.

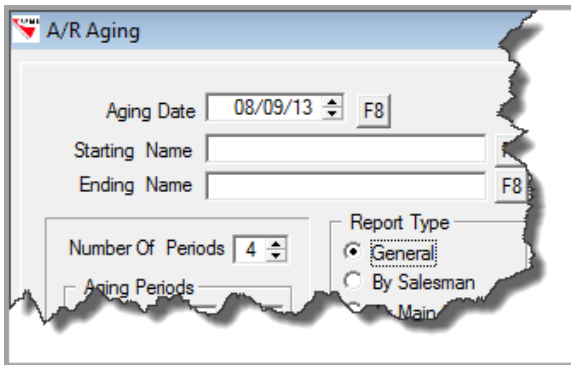


Figure General or By Salesman

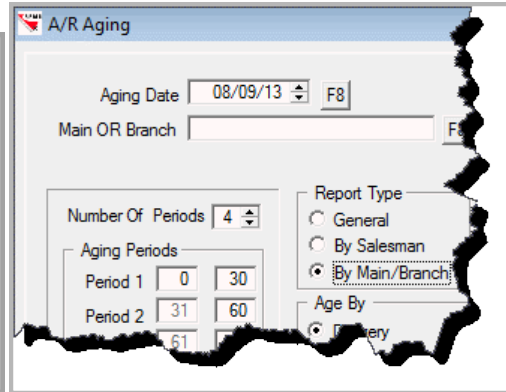
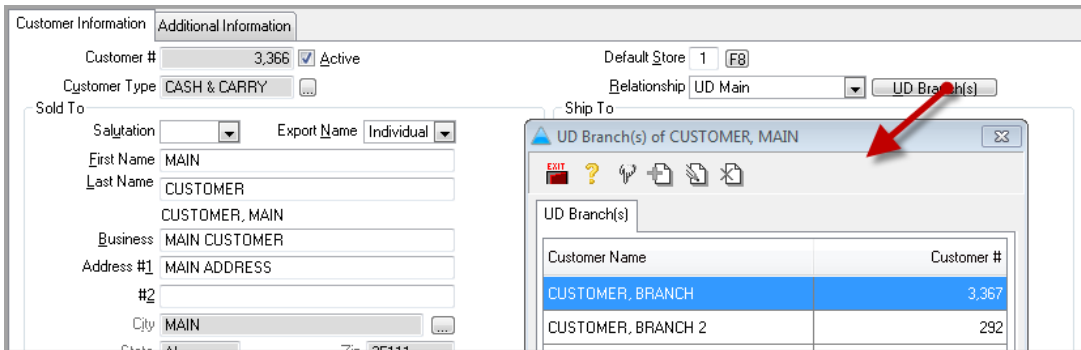
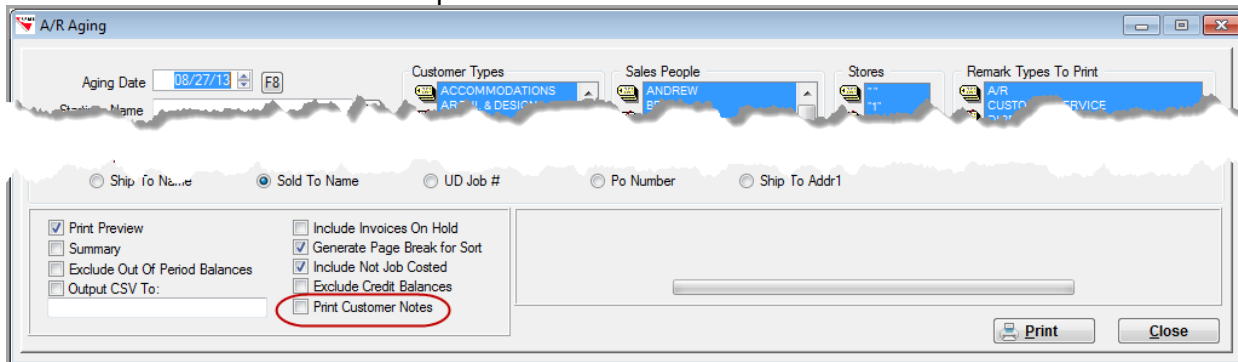


Figure Main/Branch

If the name is left blank ALL mains and their branches are printed and customers that do not belong to a main/branch relationship will not print. If a name is entered the report will include all orders that are a part of the main/branch relationship including other branches.



Customer Notes from the customer file can be printed on the report. They are not included in the csv because the data could be incompatible with the .csv file format.



Statements

Accounting > File > Accounts Receivable > Statements > Print Statements

There is a new "Print by Main" parameter. If this is select then the statements print sorted by the Main/Referring customer. The statement is still made out to the original customer but it is in the stack with its parent and the other branches belonging to the main customer.

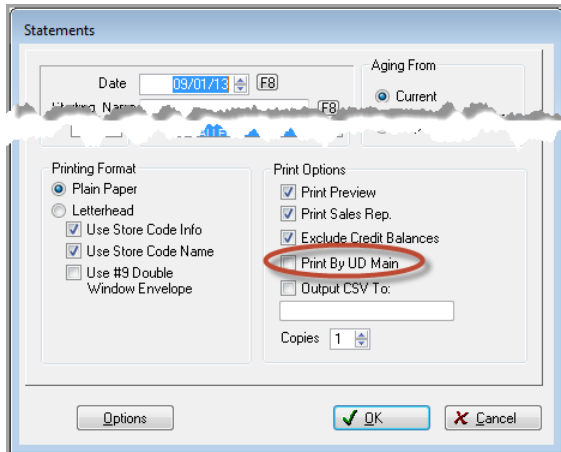


Figure Statement Options

The columns Statement Date, Current, 30, 60, 90 Total Due and Term Days were added to the CSV.

	A	B	C	P	Q	R	S	T	U	V	W
1	Store	Customer	Address	BalanceD	Statement	CurrentSu	ThirtyDay	SixtyDayS	NinetyDay	AmountD	TermDays
2	" "	A.E. SANDERS CONSTRUCT	119 IRBY	376.72	20131001	0	0	0	376.72	376.72	0
3	" "	ADVANTAGE REALTY	1641 N.	1978.14	20131001	0	0	0	1537.18	1537.18	0
4	" "	ADVANTAGE REALTY	1641 N.	1978.14	20131001	0	0	0	1978.14	1978.14	0
5	" "	ALBIONTON REC	150 NICKY	4247.5	20131001	0	0	0	4247.5	4247.5	0

Figure Statement CSV

View Journal

Accounting > File > General Ledger > View Journal

If ERRM is not turned on, then the filter by Order Entry and Inventory fields are grayed out.

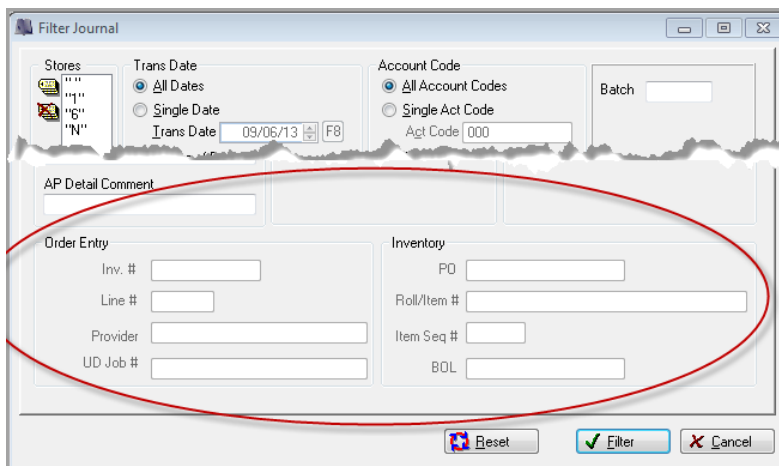


Figure Filter Journal

General Ledger

Accounting>File>General Ledger>General Ledger Functions> Trial Balance

This routine now has the option to exclude inactive accounts with no activity.

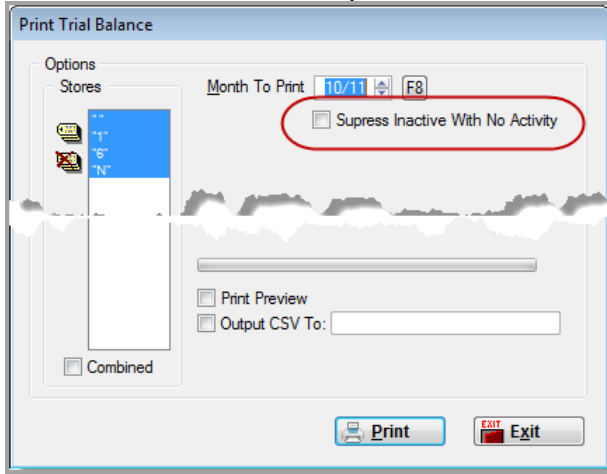


Figure Print Trail Balance Screen

Month End

Month End Inventory Balance Report

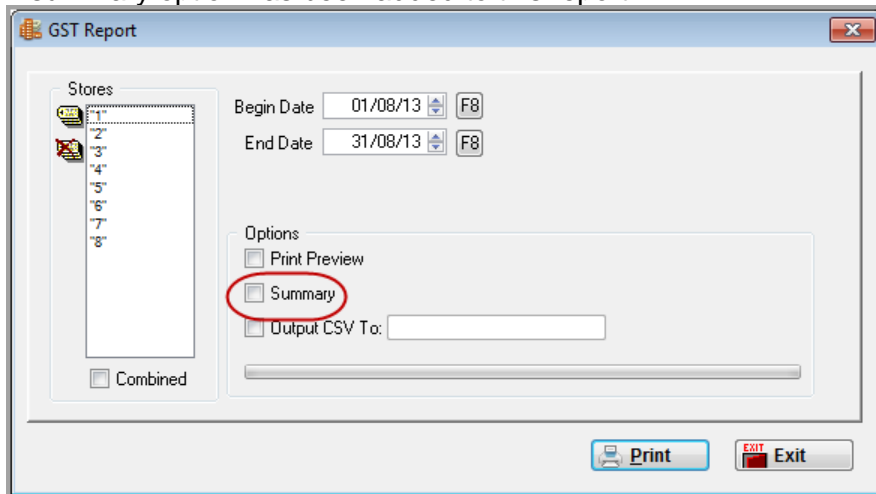
Accounting>File>Month End>Month End Inventory Balance Report

Products Codes have been added to the CSV for the Cut and Delivered Section.

GST Report

Accounting>File>Month-End>GST Report

A summary option has been added to this report.



This report only available if *>Utilities>System Options>System Wide>General>Country* is not set to USA and *>Utilities>System Options>System Wide>General>Use GST Code* set to yes.

Sales Report

Open Orders Report

Sales Report > File > Sales > Open Orders Report

Ship to Name, Order Total, Payments, Balance and Percentage of the payment made has been added to the Open Orders Report.

PC Line	Salesperson	Customer	Style / Item	Color / Description	UD Est Del	Roll / Item Number	Quantity	Units	Width	Length	Line Status
Inv Num: CG302492		Ship To Name: ALLDRIDGE, ANGELA									
Order Total: 1,148.16		Payment: 1,148.16		Balance: 0.00		%Paid: 100.00					
03 0001	FRED LOVE	ALLDRIDGE, ANGELA	ATMOSPHERE PEWTER	12" X 18" SOUND WITH 3" (3022	01/10/13	AP-12X10	1.00	SF	0.00	0.00	OnOrder
Inv Num: CG202294		Ship To Name: BROWN, LAUREL L.									
Order Total: 8,360.72		Payment: 3,500.00		Balance: 4,860.72		%Paid: 41.86					

Figure Open Orders Report

Updates to Add on Programs

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

Bid Pro

Job Estimate

The ability to sort the browse by Estimate Date has been added.

The supplier field has been added to the Line Browse of an Estimate.

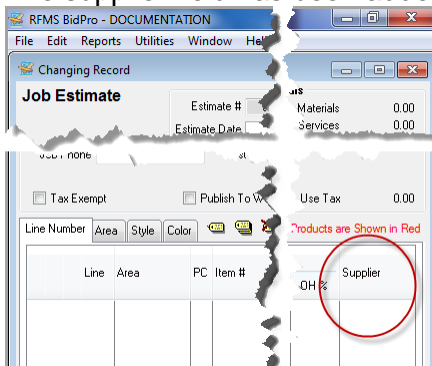


Figure Estimate Browse Field

Export to Order Entry



Bid Pro>Edit>Export to Order Entry or Bid Pro>Export to Order Entry Button

An option has been created to not export the prices and totals to Order Entry. They will go over as 0 if the box is checked.

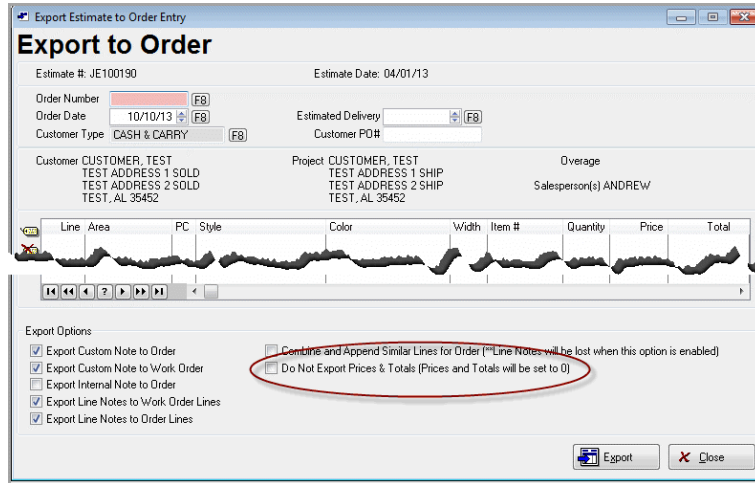


Figure Export Estimate to Order Entry Screen



Notes:

When using this feature, overages will not be allowed.

CMM

Appointments

The ability to copy highlighted appointments has been added.

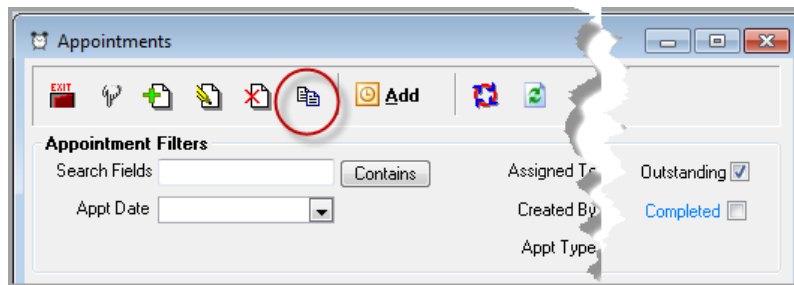


Figure Appointments

The copied appointment is listed with appointment name-copy.

06/05/13	11:30 AM	CHECK ON APPT	HOME VISIT	SCHEDULED	ANDREW	KIMBERLY	(BE BACK), SEE FR	PROSPECT
06/05/13	11:30 AM	CHECK ON APPT-COPY	HOME VISIT	SCHEDULED	TO BE ASSIGNED	SABRINA	(BE BACK), SEE FR	PROSPECT

Figure Copied Appointment

When Using the Import Appointment Template feature, the appointment date will come over as blank rather than the appointment date on the template record.

Date	Appointment	Location	Start Time	End Time
	MARK-CPT ONE CONV	ORLANDO, FL		
10/01/13	TEST TEMPLATE	ADDRESS 1, ADDRESS 2, CITY AL		

Figure CMM Appointment Template

Adding Appointment

Appointment Information

Appointment: TEST TEMPLATE
 Type: IN HOUSE
 Location: ADDRESS 1, ADDRESS 2, CITY AL 35401
 Details: DETAILS

Appointment Status

Assigned To: SABRINA
 Assigned To Status: Accepted Requested Declined To Be Assigned
 Priority: Low Normal High
 Appt Status: Scheduled Need To Reschedule Completed Tentative Follow Up Needed Canceled
 Appt Date: [] Start Time: [] End Time: []
 Reminder: Date: [] Time: []

Related To

Add Remark Add Task
 Record Type: [] # RECORD NOT FOUND
 Business: RECORD NOT FOUND
 Contact: []
 Phone #'s: [] EMail: []

Record Information

Date Created: 10/21/13 10:15 AM Inactive
 Created By: SABRINA
 Date Edited: 10/21/13 10:15 AM
 Edited By: SABRINA
 Viewing Rights: Private Public Use As Template

Import Appointment Template [Ok] [Cancel]

Figure CMM Appointment Information

Alerts

Browse Field

Client Management > File > Alerts

The Business Name of the related record has been added to the browse.

RFMS Client Management: Retail Sales Manager for DOCUMENTATION

File Edit Utilities Window Help Mail Navigator

Inactive System Generated

Date Created	Due Date	Alert Type	Details	Assigned To	Created By	Related Record	Business Name	Related Record Type
10/01/13		APPOINTMENT		SABRINA	SABRINA	ABSTON, BYRON		PROSPECT
10/01/13		INSTALL CHECK		SABRINA	SABRINA	CG302629	AARON, HARRIS	ORIGINAL ORDER

Figure Alert Browse

Purchase Order Alerts

The product name has been added to Purchase Order Alerts.

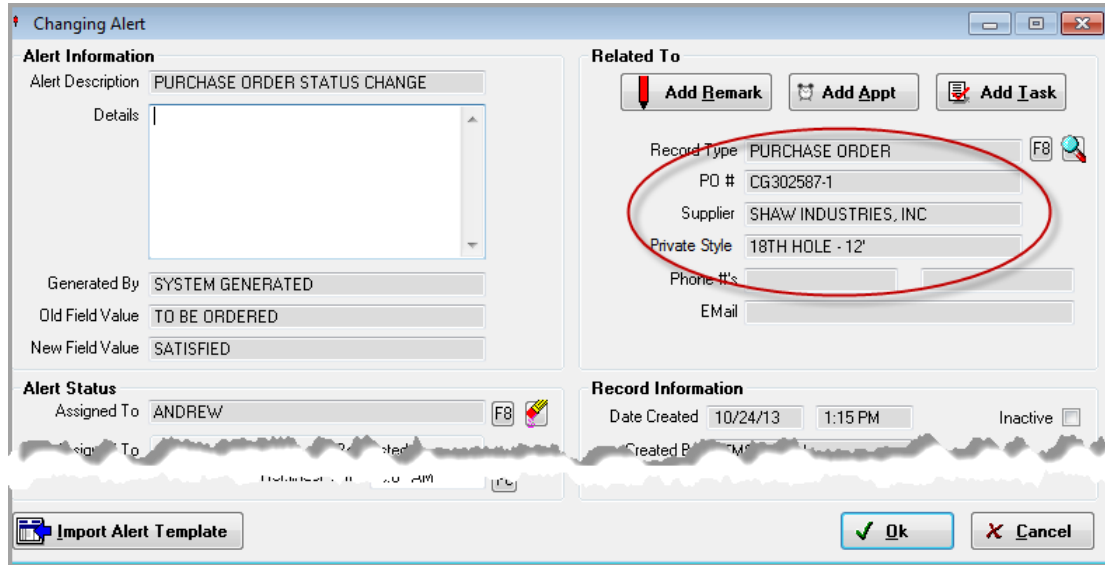


Figure Changing Alerts

Prospect & Customer

The erase button  has been added to each F8 filters previously all filters had to be reset.

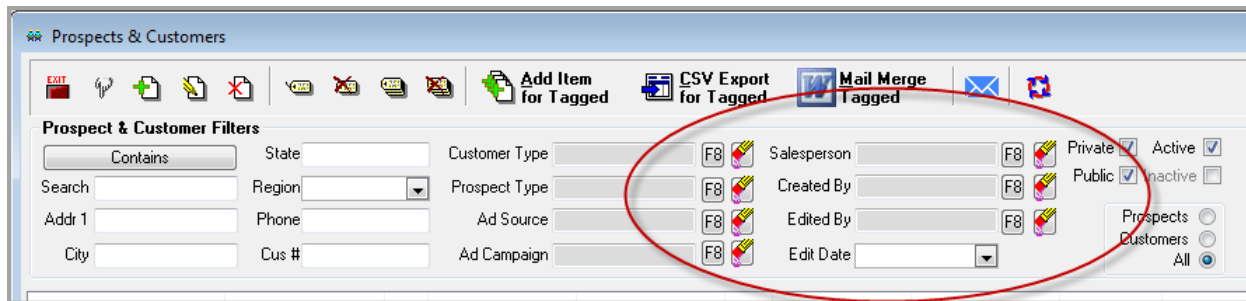


Figure Prospects & Customers Browse

A change status button has been added. It can be password protected. It is also in the Customer file in Order Entry.

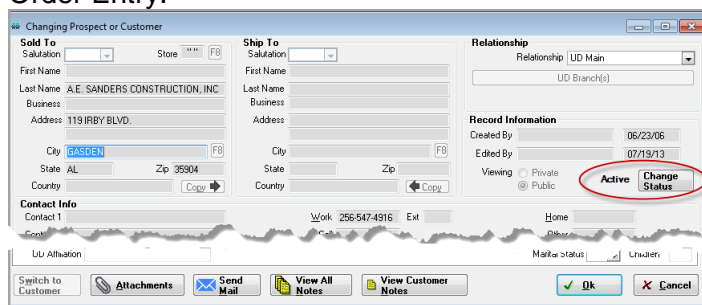


Figure Changing Prospect or Customer

Schedule Pro

Populate Hours from Job into Providers Regular Time Field

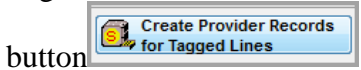
X (Module)>Utilities>System Options>Schedule Pro>Providers>Populate Hours from Job into Providers Regular Time Field

If option is set to Yes, when creating provider records it saves the hours from the job into the regular time field in the provider record.

It also follows the option to “Use Units and Dates From” either Actual or Scheduled, and the option to “Combine Split Lines and Display on Last Install Date.”

Schedule Pro>File>Create Provider Records

Tag the records that need to be create and then click the Create Provider Records for Tagged Items



Notes:

If the hours for a job are 9 or more, an hour is removed for lunch. For example, 8 am-5 pm =9 hours, but 8 will be posted for the job.

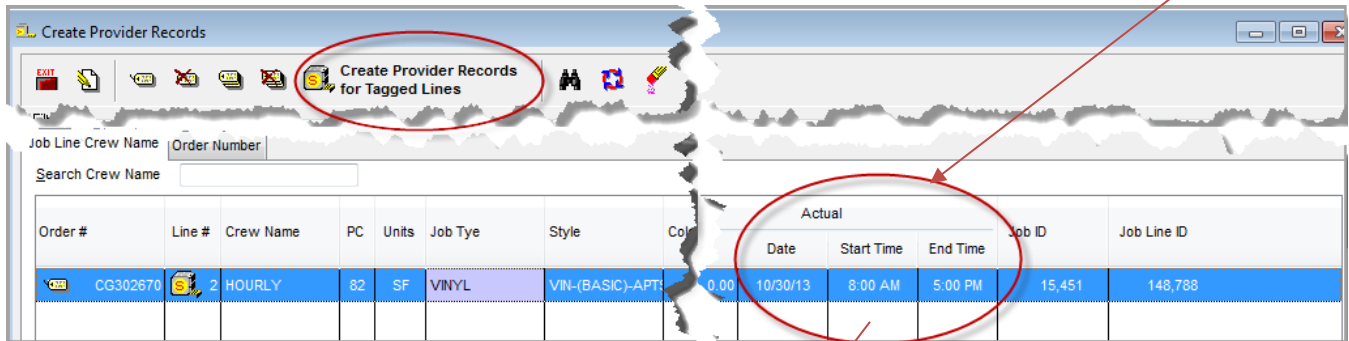


Figure Schedule Pro-Create a Provider Record

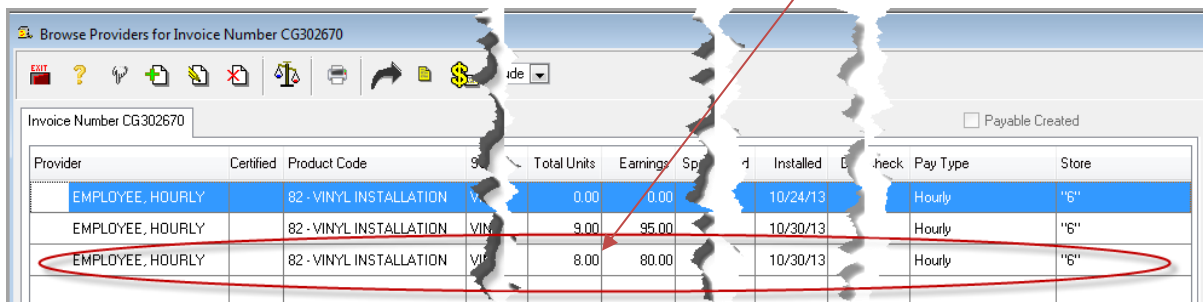


Figure Order Entry Provider Record

Schedule New Jobs

Schedule Pro>File>Schedule New Jobs

Yellow text has been changed to blue

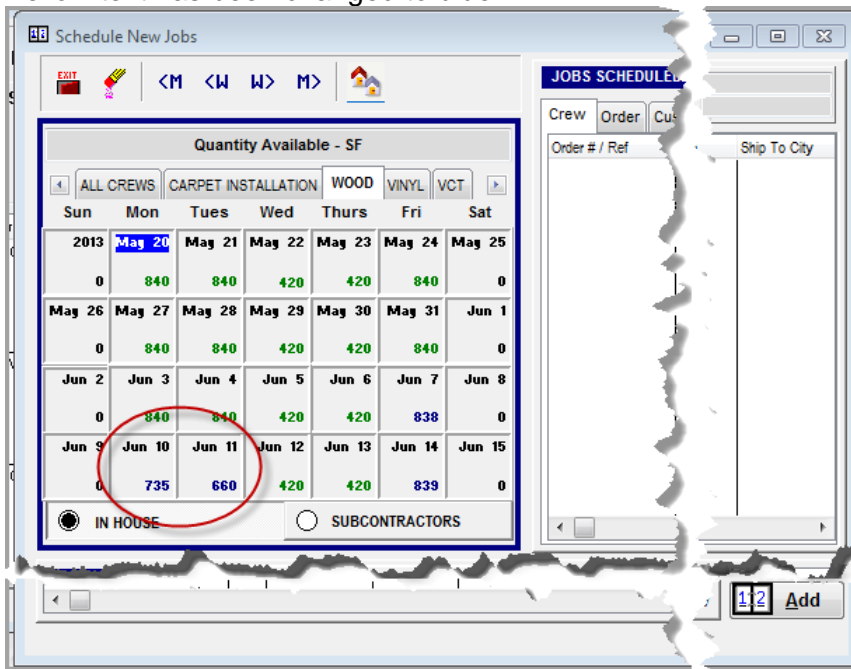


Figure Schedule New Jobs Colors

The Schedule New Jobs Browse Screen now only shows the quantity for the job for the date selected on the calendar.

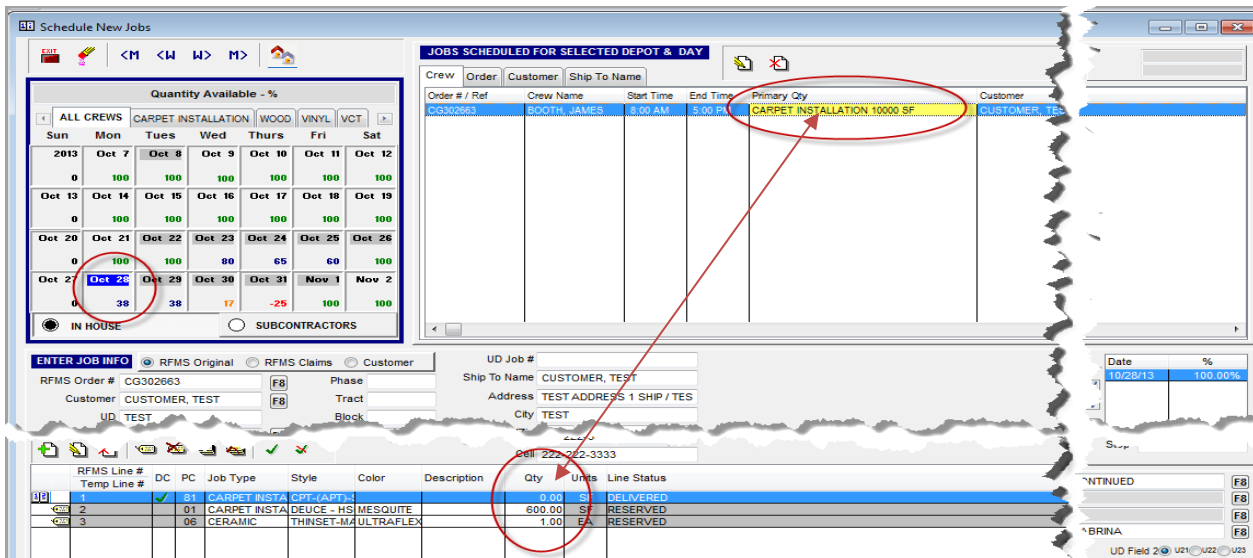


Figure Schedule New Jobs

Work Ticket

The Style and Color fields in a Work Ticket will now display up to 80 characters.

WORK TICKET

Ship To CUSTOMER, TEST
 TEST ADDRESS 1 SOLD
 TEST ADDRESS 2 SOLD
 TEST AL 35452
Work 111-222-3333
Cell 222-222-3333
Order Number CG302561
UD Job #
UD REFERENCE PROMPT

Store MY NEW STORE
Depot IN HOUSE
Customer CUSTOMER, TEST
Salesperson ANDREW
Primary Crew NO CREW ASSIGNED
Secondary Crew
Install Dates 10/08/13 to 10/08/13
Time Slot MIXED

Date Time	Job Type Product Code	Roll / Item # W x L	Style Color	Description Crew	Qty
10/08/13	EXPEDITING		YOU CAN NOW TYPE UP TO 80 CHARACTERS HERE		0.00 EA
8:00 AM - 5:00 PM			YOU CAN NOW TYPE UP TO 80 CHARACTERS HERE		

Figure Work Ticket Preview

Enterprise Manager

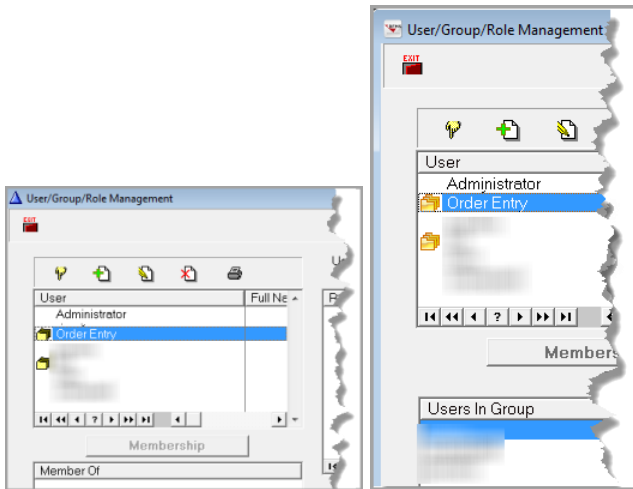


Figure Old Version

Figure New Version

When a group is highlighted, the members of the group are now listed in the lower left hand box.

When deleting a role, a warning message will now display if there are users or controls (paths) assigned to the role.

