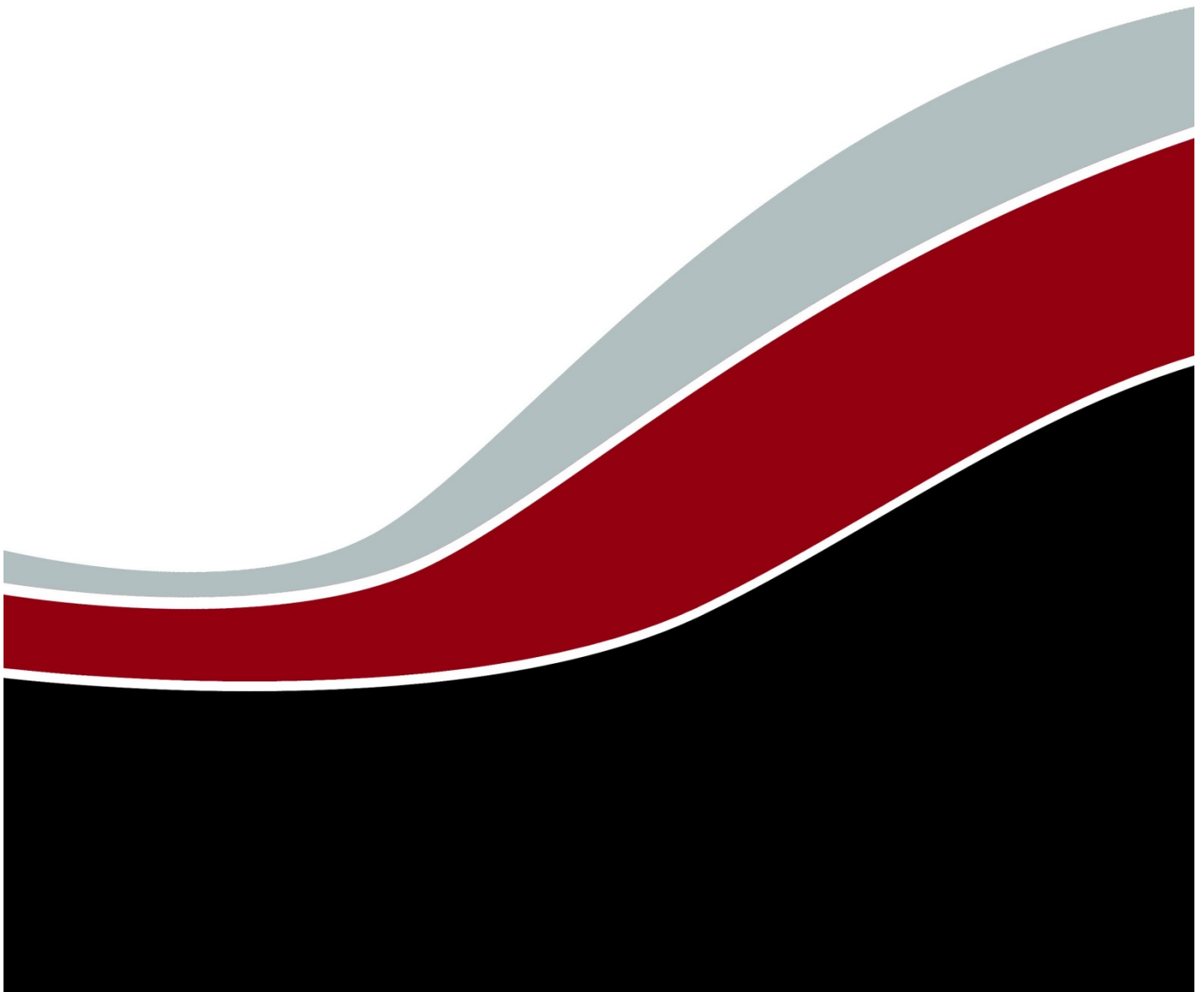


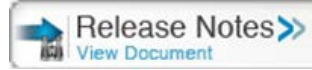


Systems for Success



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.](#)



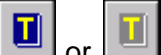




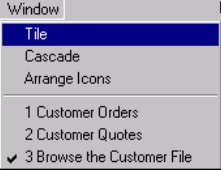



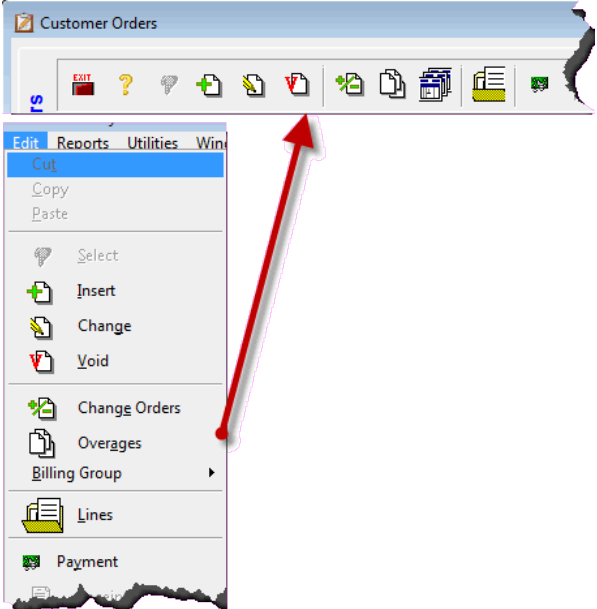
The same documentation is included in the on-line help system and can be accessed by pressing the F1 button at any RFMS screen. If there is something on the screen that you either don't recognize or understand, check this document or refer to the Help Files pressing F1.

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 1606 1312 1705" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p>UD JOB # <input type="text"/></p> <p>UD HEADER LABEL 1 <input type="text"/></p> <p>UD HEADER LABEL 2 <input type="text"/></p> </div>
<p>Update Release Notes</p>	<p>Update documents contain only the new features contained the software updates. For all changes see the release notes on the download webpage.</p> <p>Click the release notes button to find these.</p> 

RFMS Button and Menu Conventions

 	Exit the current screen. Can also use the Escape key on the keyboard.
	Access the help file. Can also use the F1 Key on the keyboard.
	Activates or selects the highlighted record.
 	Add a new record. Can also use the Insert key on the keyboard.
 	Make changes to a record.
 	Delete a record.
 	Add or View Notes on a record.
	View all notes and Client Management Remarks related to a record.
 	Find a record using specific fields. Changes to blue when a find is in process.
 	Resets a filter to the default settings.
	Refresh the browse without resetting the filters
	Saves the current information and exits the screen.
	Exits the screen without saving the newly entered information.
	Exact match required in a search.
	Partial match only required in a search.
 or Ctrl-S	Text search Reminder: this searches the browse list from the highlighted record down only. When beginning a search it is best to begin at the top of list.
 	Print a document or go to a report menu.
	Allows adding, changing or deleting graphic 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>Edit Menu</p>	<p>The Edit Menu can be used as a shortcut to the toolbar options.</p> <p><i>>Edit></i></p> 

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Version 14.0

Payroll Update

The newest version of RFMS will be called Version 14.0. This update includes the updated Federal Tax Tables and formatting for printing W2s and 1099s (i.e. Payroll Update). There will be not be a Version 13.0.

Links to [United States Year End Processing](#), [Canadian End-of-Year Processing](#), and [Year End FAQs](#).

Tax Tables

States with changed tax tables

The following states have changed tax tables for 2014

California, Connecticut, Delaware, Indiana, Kansas, Kentucky, Massachusetts, Maine, Michigan, Minnesota, Missouri, New Mexico, New York, North Carolina, North Dakota, Oklahoma, Oregon, Rhode Island, Vermont, Washington DC, Yonkers

System Wide

System Options

Min. Carpet Roll Balance To Leave

X (Module)>Utilities>System Options>Order Entry>Inventory>Min. Carpet Roll Balance to Leave Category-Configuration

Type- Must be Global 🚫

This option applies to the Inventory Allocator module. Input the minimum carpet roll balance to leave. To adjust the minimum amount, Type in a new value or use the up and down arrows to change the number of minimum amount. For example, if a typical room size is 12' 9" set the minimum to this.

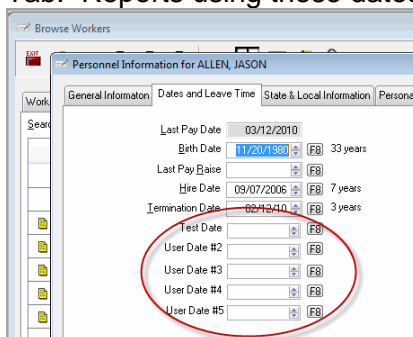
Specify Workers User Defined Date #1-#5

X (Module)>Utilities>System Options>Human Resources>Accounting>Specify Workers User Defined Date

Category-Prompts

Type- Must be Global 🚫

This option allows defining date fields in the worker information screen under the Date and Leave Time Tab. Reports using these dates will be available in future updates.



The screenshot shows a software interface for 'Personnel Information for ALLEN, JASON'. The 'Dates and Leave Time' tab is active. Fields include: Last Pay Date (03/12/2010), Birth Date (11/20/1980) with '33 years' next to it, Last Pay Raise, Hire Date (09/07/2006) with '7 years' next to it, Termination Date (02/12/10) with '3 years' next to it, Test Date, User Date #2, User Date #3, User Date #4, and User Date #5. A red circle highlights the Test Date and User Date #2 through #5 fields.

Figure HR User Defined Date Fields

Additional Provider Features for Payroll: Certified, Union and Rate Matrix

*X (Module)>Utilities>System Options>Human Resources>Providers>Additional Provider Features for Payroll: Certified, Union and Rate Matrix
Category-Configuration*

Type- Must be Global 

With this release, RFMS is able to apply multiple rates based on many different criteria. Additional features for certified and union payroll will be added in a future update. This requires a special access code, so no one turns it on accidentally. Training for this feature is required before activation. Contact your RSA for more information.

More information about the feature can be found [here](#).

Method for Balancing Provider Charges with Order Service Line

*>Utilities>System Options>Order Entry>Providers>Method for Balancing Provider Charges with Order Service Line Costs
Category-Configuration*

Type- Must be Global 

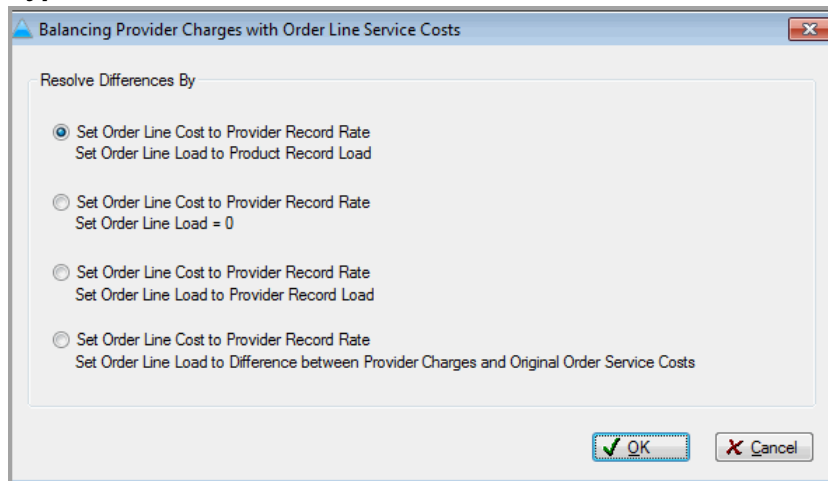


Figure Balancing Provider Charges with Order Line Service Costs

This option is used to choose the method for resolving differences when balancing providers. This option is primarily used in conjunction with the additional provider features and a special access code will be required to activate it.

Order Entry

Customer Orders

Attachments

When viewing attachments on a customer line, the related switch now shows the attachments from Products and Inventory for the line.

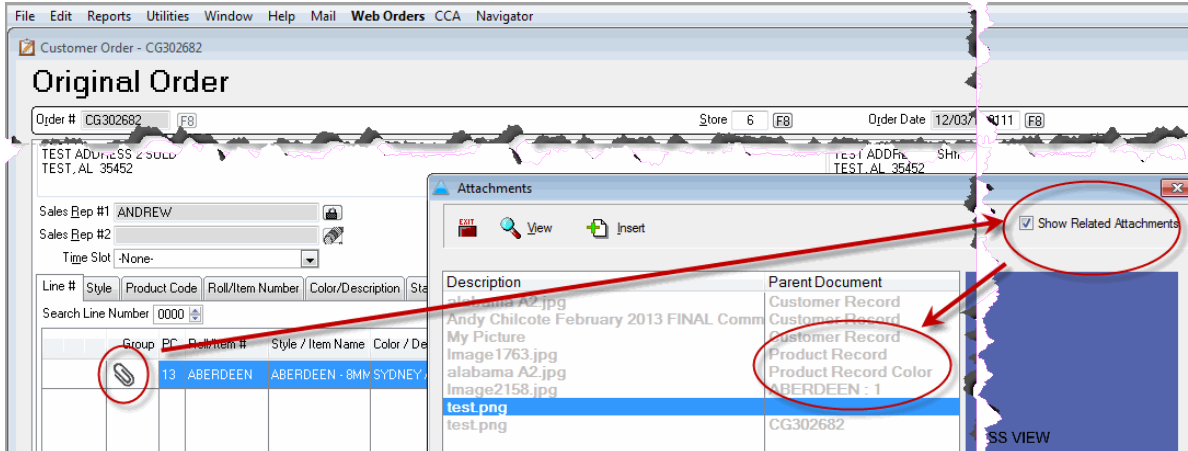


Figure Attachments on a Line

Customer Pickup

The pickup document can now be previewed before it is printed.

Click Save Signature.

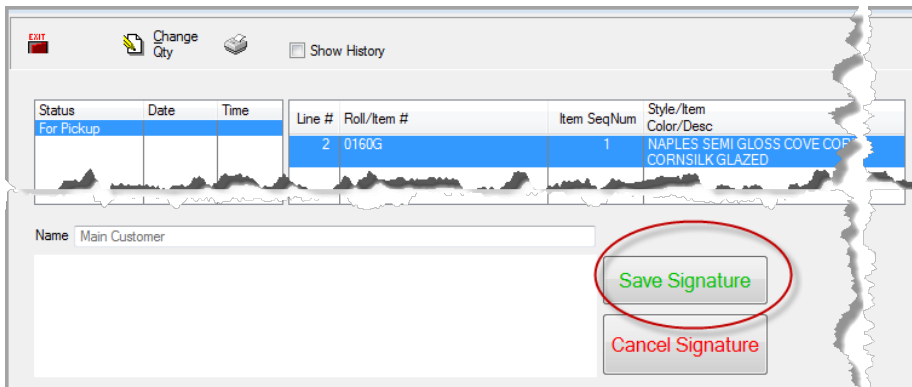


Figure Customer Pickup Signature

The preview of the Pickup Document will be displayed.

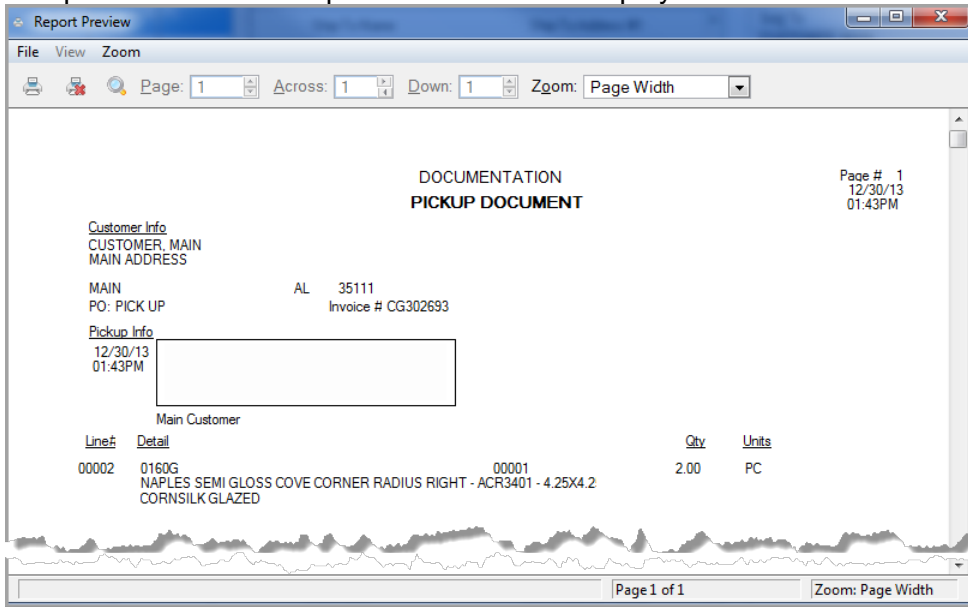


Figure Customer Pickup Document Preview

Provider Record Enhancements

With this release, additional features have been added the Provider Record. The fields have also been arranged so that similar fields are grouped together.

Basic Provider Record

Old Provider Record Screen

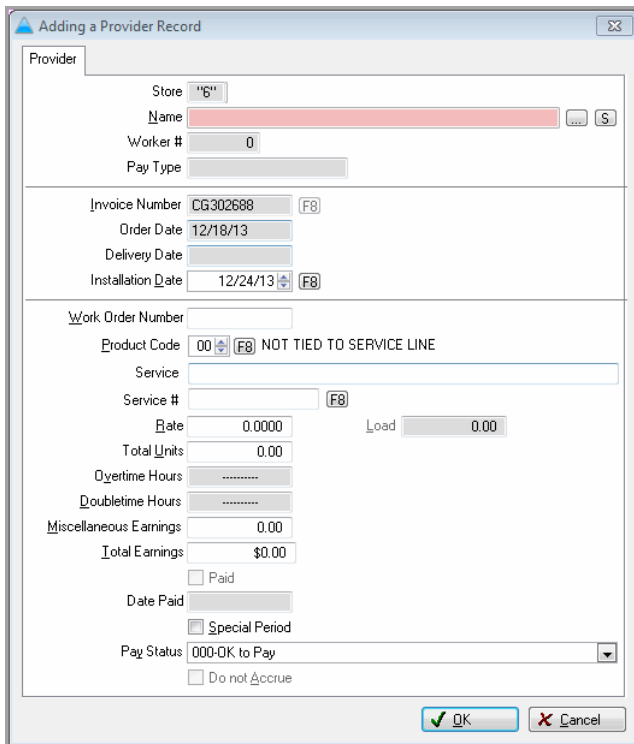


Figure Old Provider Record

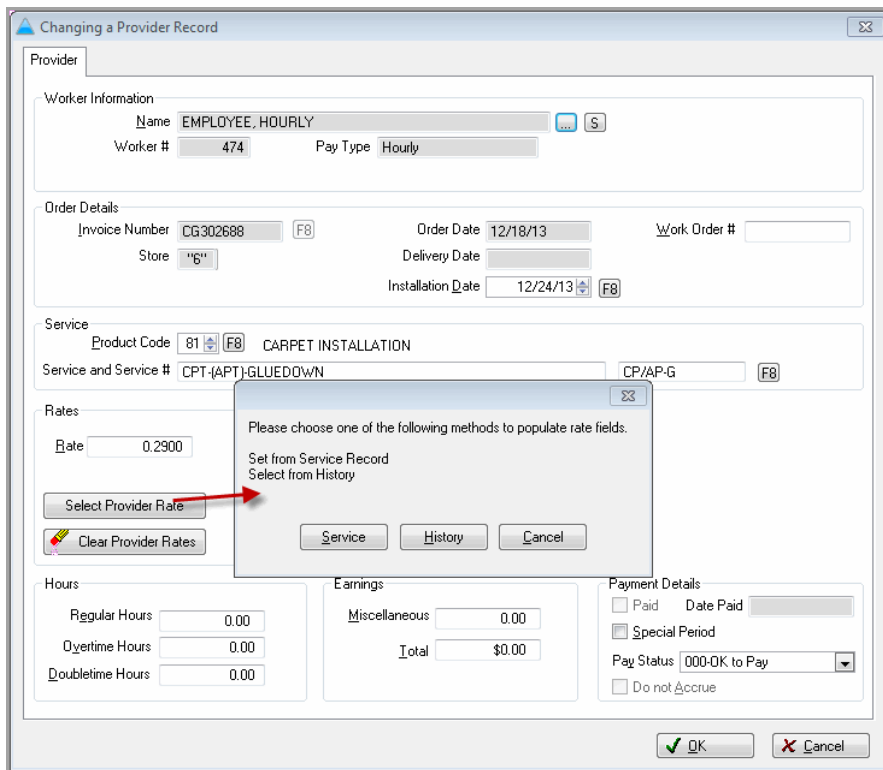


Figure New Provider Record without Provider Rates Matrix without Certified Payroll

Worker Information: This information has not been changed. Selecting an hourly worker will bring in their hourly rate.

Order Details: The store code and work order number have been moved into this section

Service: This has been given its own section. If a specific service is chosen, its rate will be brought into the **Rate** field. (Even for an hourly worker.)

Rates: This has been given its own section and new features.

A **Provider Rate Clear** button has been added which clears all rate fields.

Select Provider Rate button: brings up the options to re-select the rate from the service if it has been cleared or use the [provider's history](#) to select the rate. This will also update the rate for the service if it has changed since the rate was first selected.

Hours: This has been given its own section

Earnings: This has been given its own section

Payment Details: This has been given its own section.

Provider's History

Another option has been added for selecting the rate for a particular provider. The rates entered for their previous jobs can be used to select the rate for the current job.

First select the provider name.
Then click the **Select Provider Rate** button.

Adding a Provider Record

Provider

Worker Information

Name: EVANS, MIKE

Worker #: 48 Pay Type: Subcontractor

Order Details

Invoice Number: CG302689 Order Date: 12/23/13

Store: "G" Delivery Date: Installation Date: 12/23/13

Service

Product Code: 00 NOT TIED TO SERVICE LINE

Rates

Rate: 0.0000

Select Provider Rate

Clear Provider Rates

Matrix Rate Information

Base: 0.00
Fringe: 0.00
Overtime Rate: 0.00
Doubletime Rate: 0.00
Misc Earnings: 0.00

Select the **History** Button.

Please choose one of the following methods to populate rate fields.

Set from Service Record
Select from History

Service History Cancel

Narrow the records to select from by choosing the install date range.
Select the desired rate by highlighting and using the select button or the enter key.

Provider History

Provider: EVANS, MIKE

Install Date: Last 30 Days Last 90 Days Last 12 Months All

Worker #	Certified	Invoice	PC	Service	Service #	Order Date	Install Date	Rate	Load	Pay Type
48		CG203158	80	2 HRS		10/27/12	01/14/13	80.00	0.00	Subcontractor
48		CG203412	81			12/13/12	01/04/13	120.56	0.00	Subcontractor
48		CG203414	81			12/14/12	01/16/13	358.88	0.00	Subcontractor
48		CG203414	82			12/14/12	01/16/13	267.30	0.00	Subcontractor
48		CG203425	91	NOT READY		12/17/12	12/26/12	42.50	0.00	Subcontractor
48		CG203460	81			12/27/12	01/02/13	265.67	0.00	Subcontractor
48		CG203472	81			12/28/12	01/03/13	674.17	0.00	Subcontractor
48		CG302533	80			01/15/13	01/18/13	106.25	0.00	Subcontractor
48		CG302534	80			01/15/13	01/17/13	148.75	0.00	Subcontractor

Products

Price/Formula Screen

A button has been added on the Price/Formula screen to display price locks for Pricing and Tagging users.

Product Import/Export

Shipping Weight and Unit of Measure has been added to Product Import and Export Programs.

Accounting

HR/Payroll

System Option Change

The system option Departments Set Up name has been changed to the Departments Set Up/Unlock. This makes the unlock option easier to find.

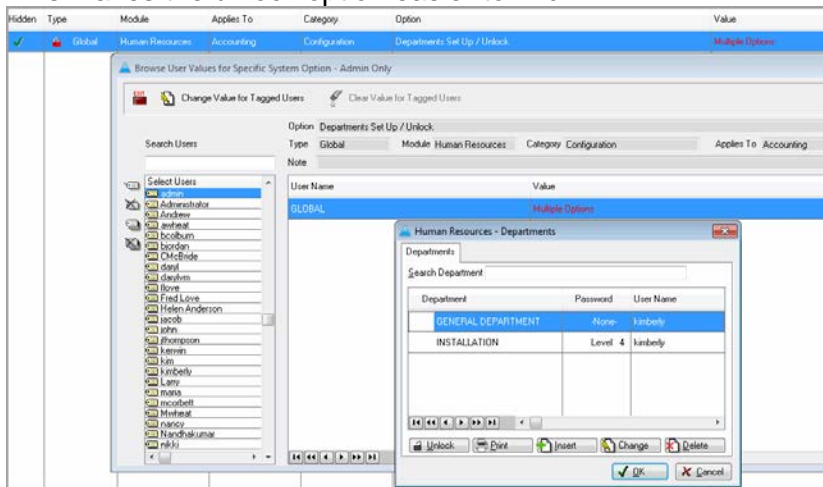


Figure Departments Set Up/Unlock

Skill Levels

Accounting>File>Human Resources>Utilities>Skill Levels

A new table **Skill Levels** has been added to Human Resources. This table will become the source for work classification field on the certified payroll report.

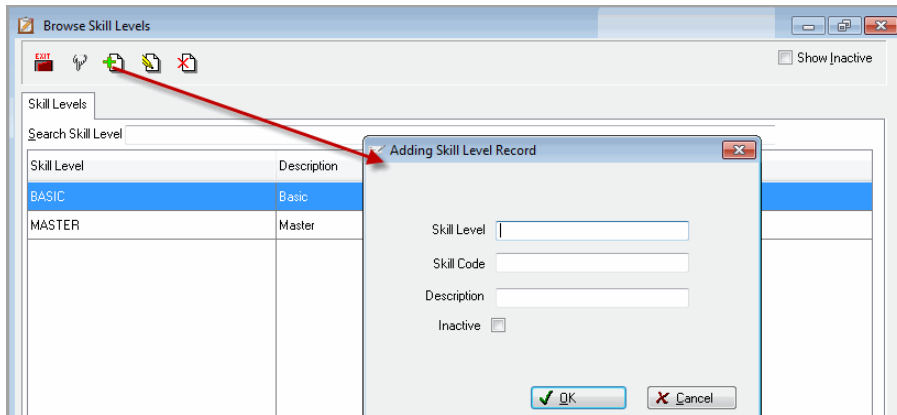
Click the **Insert** button to add a skill level.

Click the **edit** button to change a skill level.

On the **edit** screen check the **inactive** box to not display a skill level by default.

To display inactive levels on browse lists, check the **Show Inactive** box on the browse screen.

Click the **delete** button to remove a skill level.



Sales Reports

Material Analysis

The Export Date column header was mistakenly labeled Del Date.

F	G		K	L	M
LineStatus	PC	IF	OrderDate	ExportDate	Width
None	4	13OND	20120413	20120416	0
None	1	13	20091211	20100201	12
None	1	13	20100907	20100907	12
None	1	13	20100309	20100325	12
None	1	13	20100309	20100325	12

Figure Material Analysis csv

Pricing and Tagging

License

Pricing and Tagging must have a license to operate now. Please contact the Business Office at RFMS to receive it.

Rounding Values

Pricing and Tagging will now round up to the nearest four values. Dealers can choose any four values for rounding.

Pricelist Date to Excel

A column for Percentage Off can now be added to the Excel sheet.

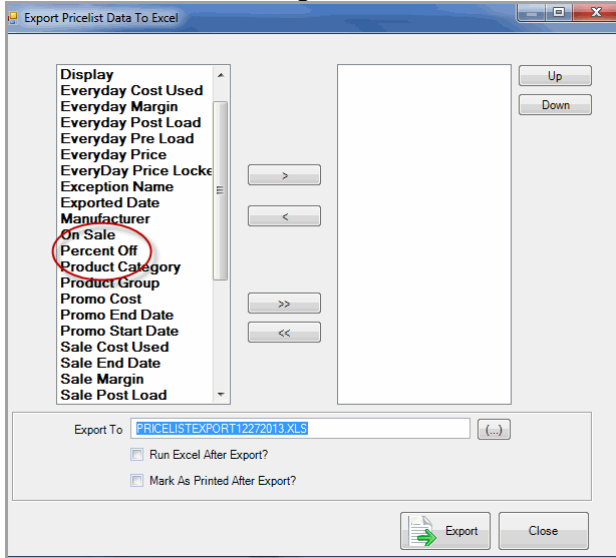


Figure Export Pricelist Data to Excel

Sales Pro Mobile

Survey

The ability to ask questions to help choose a product for the client has been added to this module. A survey must be set up through Survey Creator.

Setting up the Survey

1. Go into your RFMS directory.
2. Click on SurveyCreator
3. Click New Survey.

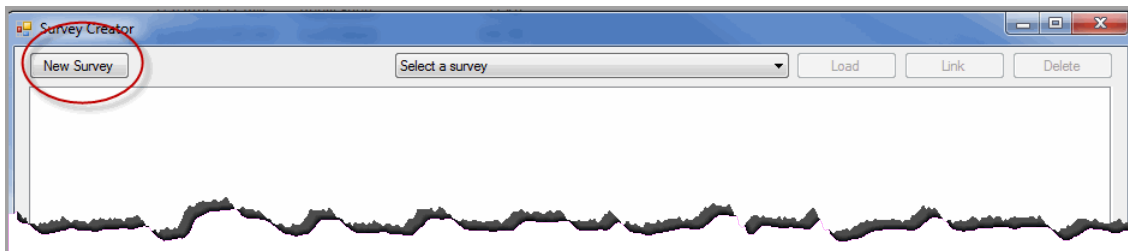


Figure Survey Creator

4. Name the Survey and select a target. The target will be Pr_Code.

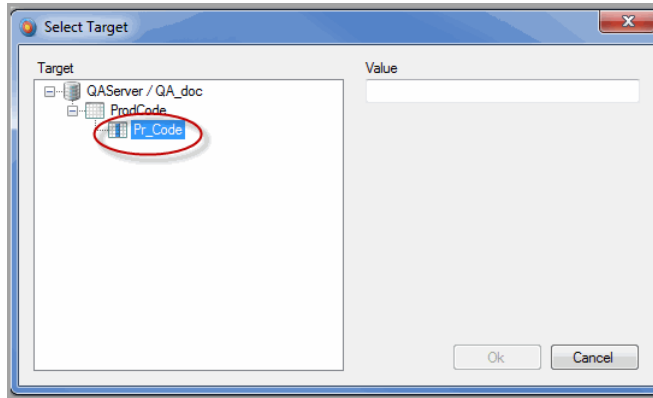


Figure Target for Survey

5. The value should be equal to the Product Code that the questions match. For example, Carpet is 01.
6. Highlight New Question. Choose Question Type, Question Title and Question Text.

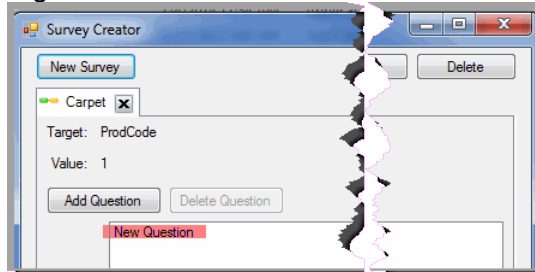


Figure New Question

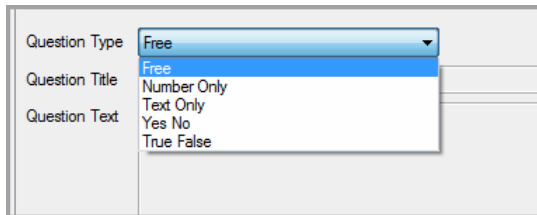


Figure Question Type

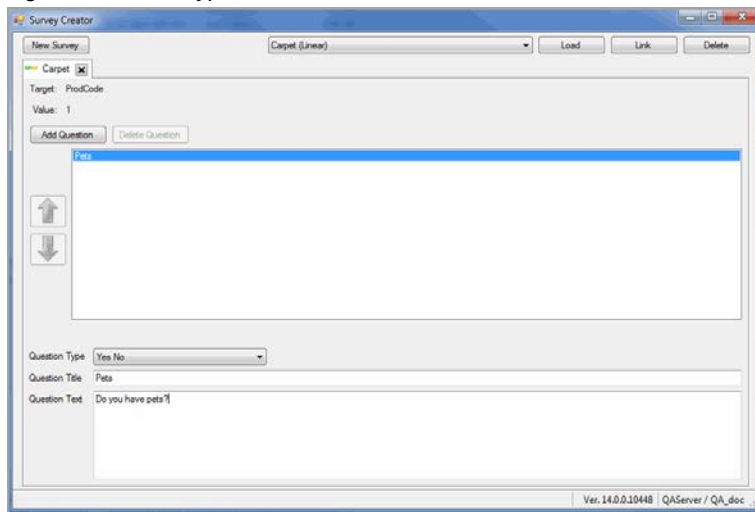


Figure Created Question

7. Continue to create questions in the same manner.

Answering the Survey

1. In Sales Pro Mobile, go to Add Products
2. Click on Questions. Questions will be grayed out unless a survey has been created for that product code.

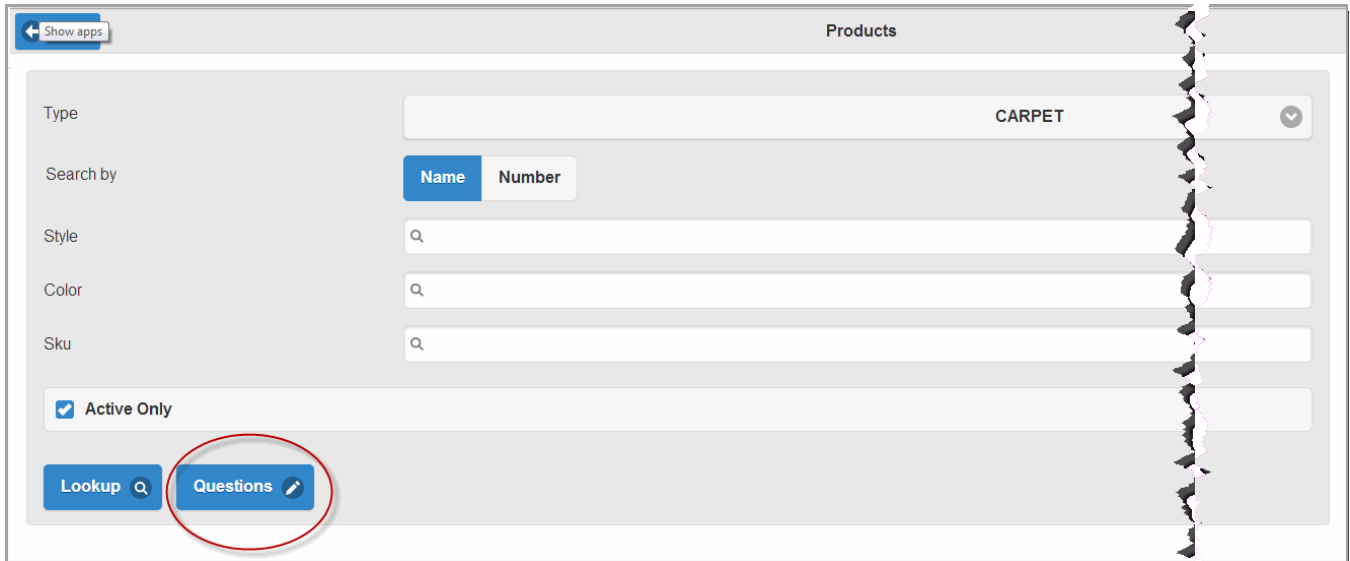
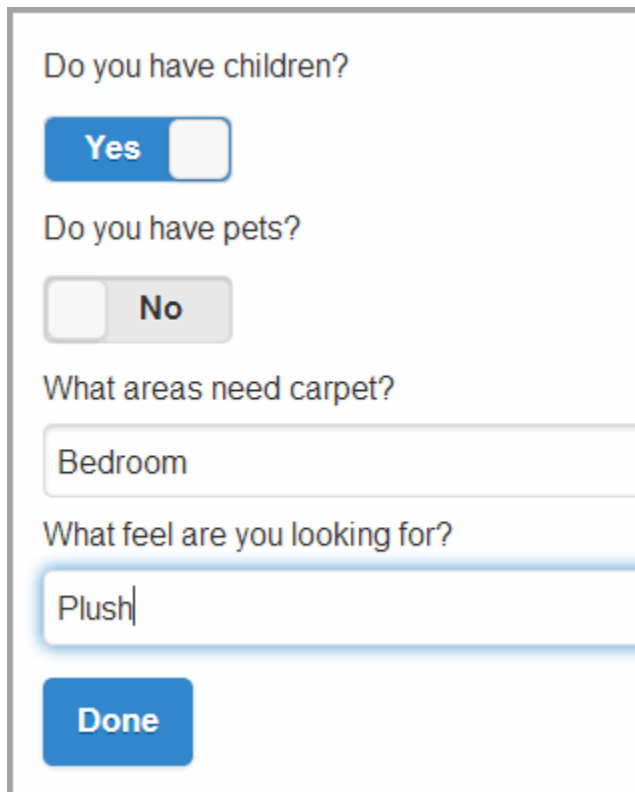



Figure Sales Pro Mobile Questions

3. Answer the questions for the survey.

A screenshot of a survey form. The questions and answers are as follows:
1. Question: 'Do you have children?'
 Answer: 'Yes' (selected)
2. Question: 'Do you have pets?'
 Answer: 'No' (selected)
3. Question: 'What areas need carpet?'
 Answer: 'Bedroom'
4. Question: 'What feel are you looking for?'
 Answer: 'Plush'
At the bottom of the form is a blue 'Done' button.

4. Complete your quote and submit it.

5. In *Order Entry>Quotes*, open your quote and to view your Questions' answers click .

6. Click Sales Pro Mobile Check List.

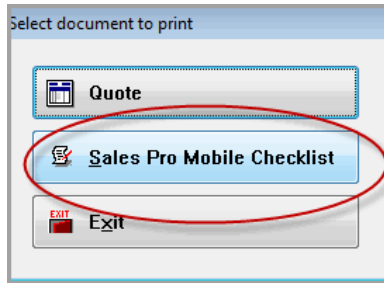


Figure Quote Print Options

7. The survey information will print.

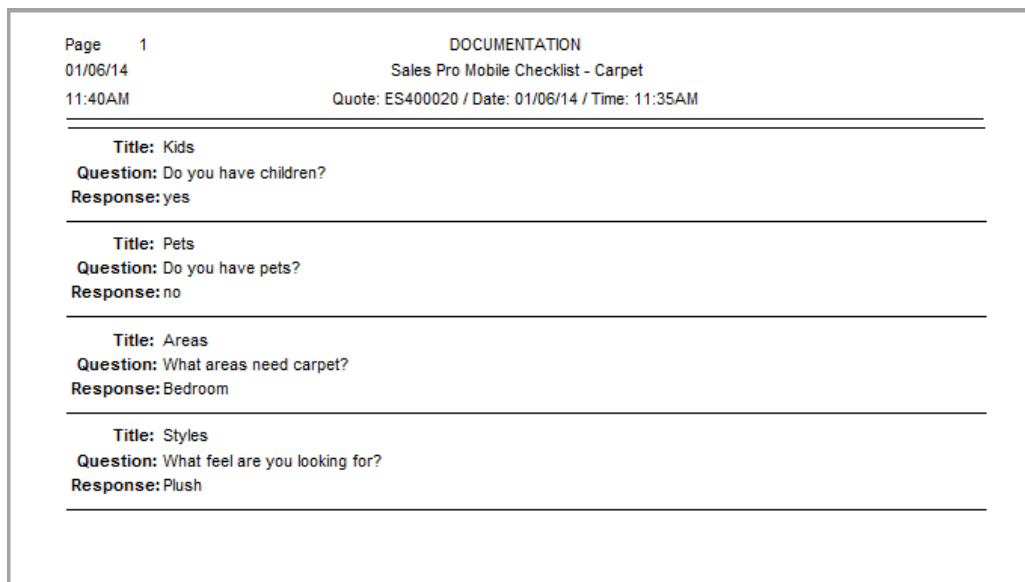


Figure Preview Sales Pro Mobile Checklist



Notes:

The survey information does not transfer over to an order when exported.