



Systems for Success

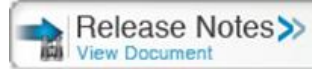
A large decorative graphic on the right side of the page, consisting of three overlapping, curved bands. The top band is light gray, the middle band is dark red, and the bottom band is black. The text 'Version 14.0.3 User Guide' is overlaid on the red and black bands.

Version 14.0.3 User Guide

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

webpage. Click the release notes button to find these.






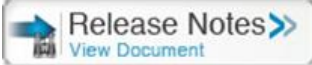
To see what you may have missed in previous updates click here.
































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

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

Documentation Conventions

 Notes:	Indicates extra Information
	This symbol indicates a best practice, or an example.
<u>Setup</u> >System Setup	Indicates Menu item shortcuts: An underlined letter indicates this is a "hot key". On Main menus click the Alt button plus that key to go directly to that field or function. On Drop Down menus just type that key.
Field Name	Indicates a Field Name or button Name
Important	Important information
Screen Shots	To conserve space the screen shots are seldom actual size and may have blank spaces or other non-essential information cropped from them.
	Links to other documents or web pages are included when additional explanations are available. Click the notebook to find that information.
Links to other topics	Various places in this document have links to other topics in the document. To return to the original topic click Alt + left arrow. Try it out with the link to the left!
User Defined FIELD	RFMS has many fields that can be user defined. In the documentation these will be shown in all capitals with the abbreviation UD before the field name. <div data-bbox="581 1604 1313 1703" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> UD JOB # <input type="text"/> UD HEADER LABEL 1 <input type="text"/> UD HEADER LABEL 2 <input type="text"/> </div>
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. <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.


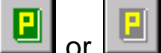
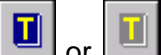


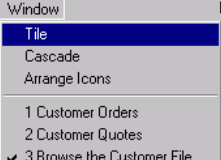



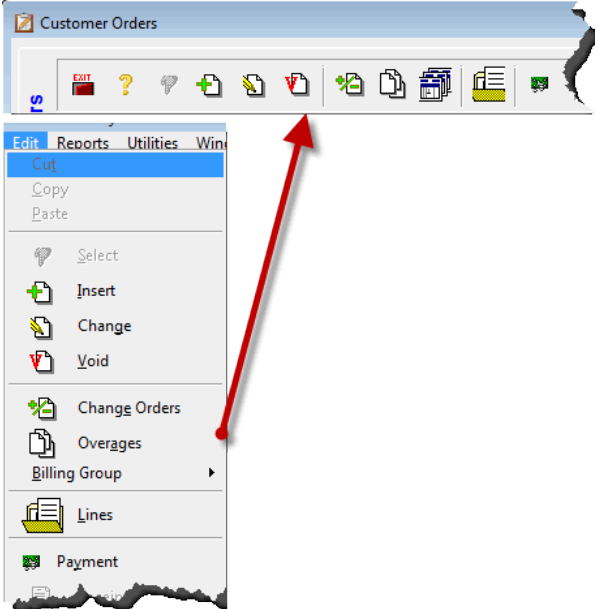
	View the history of a record.
	View the pdf history of reports for the highlighted record.
	Click to view the tracking record created for every record insert made into Orders, Quotes and Bid Pro Estimates. If gray, no records are present.
	Brings up the Client Management remote actions screen and allows adding a CMM action or relate a CMM record to this record. Yellow indicates that CMM information is associated with the highlighted record
	With all date fields in RFMS, hit the D key to fill in today's date, type in a date, use the up and down arrows to move the date one day at a time or click F8 to bring up the calendar and then choose the date.
	The bottom part of the screen lists all windows open in the current module. The one currently being viewed is checked. To view a different window, click it with the mouse.
	Access to customizing the tool bar
	Disabled Field. If set in <i>>Utilities>System Options>System Wide>General >(Set Up Global Interface System Options or Override Global Interface System Options)</i>
	Required Field. If set in <i>>Utilities>System Options>System Wide>General >(Set Up Global Interface System Options or Override Global Interface System Options)</i>
<p>Edit Menu</p>	<p>The Edit Menu can be used as a shortcut to the toolbar options.</p> <p>>Edit></p> 

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System Wide

Wisconsin Tax

Wisconsin withholding tax update as of April 1, 2014 is included in this update.

System Options

Crew Does Not Install Job Type

X (Module)>Utilities>System Options>Schedule Pro>Scheduling>Crew Does Not Install Job Type Category-Warning Messages

Type must be Global 

Default Setting-Warning

Type	Module	Applies To	Category	Option	Value
 Global	Schedule Pro	Scheduling	Warning Messages	Crew Does Not Install Job Type	Warning

This option gives the ability to set a restriction, warning or no message if a crew does not install a job type they are assigned.

Values are:

ALL - Assign to all lines even if he does not install the job type on the line.

VALID - Assign crew to only the lines with a job type that he installs.

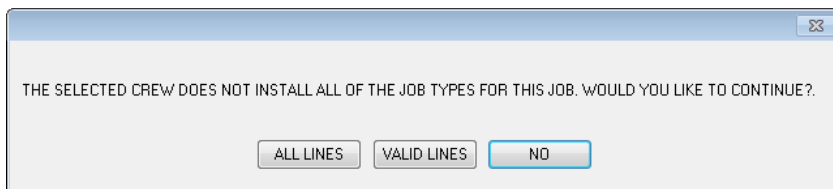
CANCEL - Do not continue with the scheduling.



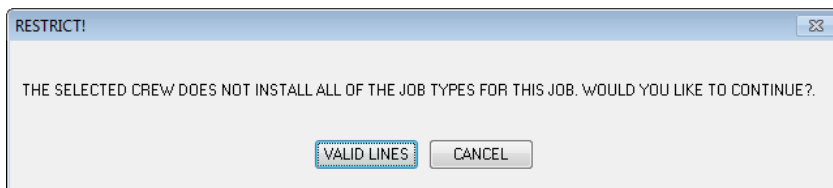
Figure Crew Does Not Install Job Type

Previously, when trying to assign a crew to a job type which they did not install an **automatic** message was displayed.

This message is now displayed if the system option is set to Warning.



With the new system option set to Restrict, lines which are valid for the crew can still be scheduled.



Notes:

A crew is thought to install a job type if he has a qty for the job type in the crew set up record.

Order Entry

Customers

Inactive Customers are viewed by Default. To not view the Inactive Customers, the Include Inactive option must be unchecked in the filter.

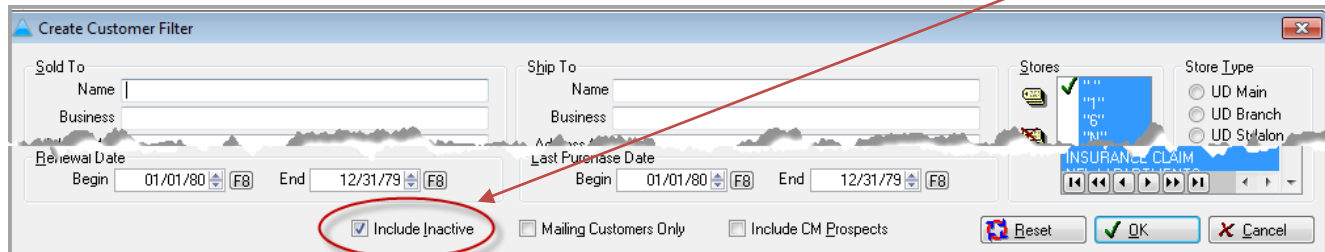


Figure Customer Filter

Accounting

Australia/New Zealand Payroll Updates

Pay Cycle

The word Biweekly has been replaced with the word Fortnightly.

Superannuation

Employees

Australia employees can contribute to their own Superannuation account. There is no need to create a Superannuation A/P for employee if the employer sets up payroll as follows:

1. Parameters / Australia Accounting Set Up - The employer sets up a special account code for "Employee Contribution to Superannuation Fund."
2. If the employee elects to contribute to her own Superannuation fund, when preparing payroll the clerk uses one of the Miscellaneous Deductions line and enters the amount and above-mention Account Code.
3. While there, the payroll person should also enter "Employer Superannuation Expense" account. When they do this, it allows HR to automatically post Superannuation to A/P.
4. When that happens, the Employee Contribution amount specified will show up at the bottom of the payroll screen
5. This amount will be included in the Amount that goes into the Superannuation Fund which is automatically posted to A/P if Step 3 is done.



Notes:

If payroll is run more than once in a day, A/P and the Superannuation Report will now post Superannuation for the entire day.

New Zealand has no provision for employee contribution to Kiwisaver

Reports

A Superannuation Report has been added. It will print at the end of a payroll run. Additionally, this report can be printed from Payroll History Reports. Output will be influenced by the following parameters: Worker Name, Start/Stop Dates, and Department.

Output to File (Comma delimited .CSV format)
Export File Name

Perpetual Report Active Only
(not affected by Start / Stop Dates)

Output to File (Comma delimited .CSV format)
Export File Name

Report Type
 Detail Summary Both

Grand Total Page

Superannuation Report Exclude Voids Preview

Figure Superannuation Report

Page 1
12/02/14 1:25PM
Superannuation Accrual by Fund
Pay Date: 01/01/14 to 31/12/14

Employee	Pay Date	Amount
Superannuation Fund: SUPERANNUATION		
Employer Membership #:		
SMITH, NANCY	02/10/14	\$115.00
SMITH, NANCY	02/10/14	\$115.00
SMITH, NANCY	02/10/14	\$136.50
SMITH, NANCY	02/10/14	\$136.50
Employee Total:		\$503.00
Fund Total:		\$503.00
Grand Total:		\$503.00

Figure Superannuation Report

Printing Checks and Reports

When printing payroll checks and reports, if there is Superannuation in the payroll, a report will be printed and posted to A/P. The Journal will be debited with specified Superannuation Account Code and credited with the Standard Accounts Payable Account Code.

A Superannuation report for the pay period will be printed with other payroll reports.



Notes:

The amounts will be amortized based on the Earnings Stores.

When preparing payroll, Australia Superannuation has complete control of the contribution amount. Employer Percent can be adjusted (even to 0%) and Voluntary is now available.

Australia Superannuation will be paid on hours worked * Hourly Rate (straight time).

ESCT

ESCT is applied to the whole dollar. For example:

Example

Employee has gross earnings of \$408.00 and an ESCT rate of 17.5%
Gross employer contribution (3%) \$12.24
ESCT is applied to the whole dollar (ie, \$12.00 in this example)
\$12.00 x 17.5% = \$2.10 ESCT
Minus the ESCT from the gross employer contribution
\$12.24 - \$2.10 = \$10.14 Net CEC

Figure Example of ESCT

Bid Pro

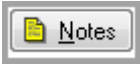
Calculator

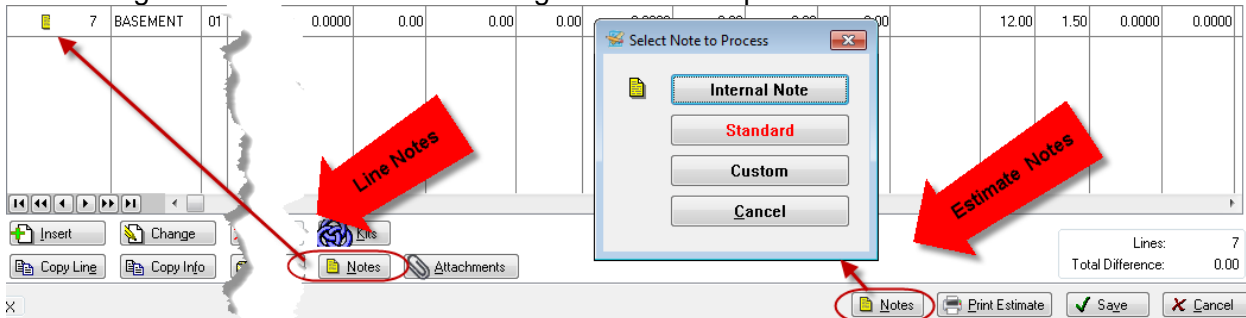
The calculator now stays open when switching windows.

Browse Screen

A column for the Last Date Exported has been added to the browse screen.

Estimate Notes

The estimate notes button  has been added to the Edit Estimate Screen, allowing viewing and editing of estimate notes while having the estimate open.



The screenshot shows the 'Edit Estimate Screen' with a table of estimate lines. A red arrow points to the 'Notes' button in the toolbar. Another red arrow points to the 'Notes' button in the bottom right corner of the screen. A third red arrow points to the 'Notes' button in the 'Select Note to Process' dialog box. The dialog box has three options: 'Internal Note', 'Standard', and 'Custom', with 'Cancel' at the bottom. The 'Notes' button in the bottom right corner is circled in red.

Figure Edit Estimate Screen

Schedule Pro

Overview

In this release, the way capacities are calculated has been changed. The capacities generally follow this formula.

Capacity for Specific Date for Installation Depot = Installation Total Depot Capacity - Crew Assigned Deduction - No Crew Assigned Deduction - No Crew Assigned Crossover Deduction

The No Crew Assigned Crossover Deduction is designed to prevent overbooking a depot when crews will be assigned later by taking into account the fact that crew's potentially assigned to a job will not be able to do jobs of other job types.

Only lines with a Deduct Capacity green Checkmark and scheduled units > 0 will be considered when calculating capacities

RFMS Line #	DC	PE	Job Type	Style	Crew Name
Temp Line #					
T1	✓		VCT		CARVALHO, JOI

Capacity Calculations are affected mainly by these system options.

Calculate Installation Depot Maximum Capacity Based On

X (Module)>Utilities>System Options>Schedule Pro>Capacity Settings>Calculate Installation Depot Maximum Capacity Based On Category-Configuration

Type must be Global

Type	Module	Applies To	Category	Option	Value
Global	Schedule Pro	Capacity Settings	Configuration	Calculate Installation Depot Maximum Capacity Based On	Manually Entered Depot Capacities

This option allows the choice of automatically calculating the capacity from the sum of all the crew's capacities or to manually enter it on the installation depot record.

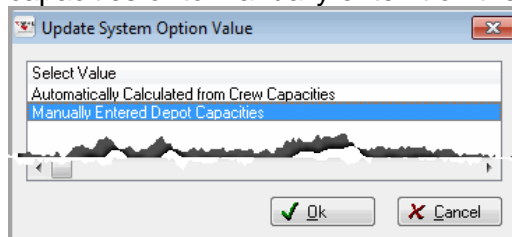


Figure Calculate Installation Depot Maximum Capacity Based On



Notes:

Manually Entered Depot Capacities

- Crossover Deduction Analysis will **NOT** be done if **Manually Entered Depot Capacities** is selected.
- Depot Capacities are **NOT** based on Daily Qty Limit or Jobs Per Day entered for individual crews if **Manually Entered Depot Capacities** is selected.

Automatically Calculate Depot Capacities


- Depot Capacities **ARE** based on Daily Qty Limit entered for individual crews if **Automatically Calculate Depot Capacities** is selected.

- Crossover Deduction Analysis will be done if **Automatically Calculate Depot Capacities** is selected.

View Installation Depot Capacities By

X (Module)>Utilities>System Options>Schedule Pro>Capacity Settings>View Installation Depot Capacities By Category-Configuration

Type must be Global

Type	Module	Applies To	Category	Option	Value
 Global	Schedule Pro	Capacity Settings	Configuration	View Installation Depot Capacities By	Number of Crews Available

This option allows the choice viewing Installation Depot capacities by number of crews available or quantity available.

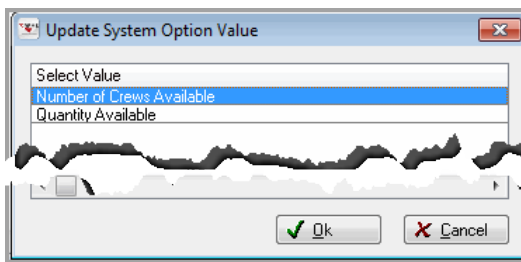


Figure View Installation Depot Capacities By

When the Number of Crews Available option is chosen, the tabs are displaying the number of crews available for scheduling.

Crews Available for Scheduling						
ALL CREWS						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
2014	Mar 10	Mar 11	Mar 12	Mar 13	Mar 14	Mar 15
0	6.0	6.0	3.5	8.0	6.0	0
Mar 16	Mar 17	Mar 18	Mar 19	Mar 20	Mar 21	Mar 22
0	8.0	8.0	6.0	8.0	8.0	0
Mar 23	Mar 24	Mar 25	Mar 26	Mar 27	Mar 28	Mar 29
0	5.0	7.0	6.0	5.0	5.0	0
Mar 30	Mar 31	Apr 1	Apr 2	Apr 3	Apr 4	Apr 5
0	7.0	6.0	8.0	6.0	8.0	0
<input checked="" type="radio"/> IN HOUSE		<input type="radio"/> SUBCONTRACTORS				

Figure ALL CREWS Number of Crews

When Quantity Available option is chosen, the ALL tab displays the capacity as % left for the day and the JOB TYPE tabs displays the quantity available for each job type each day is shown.

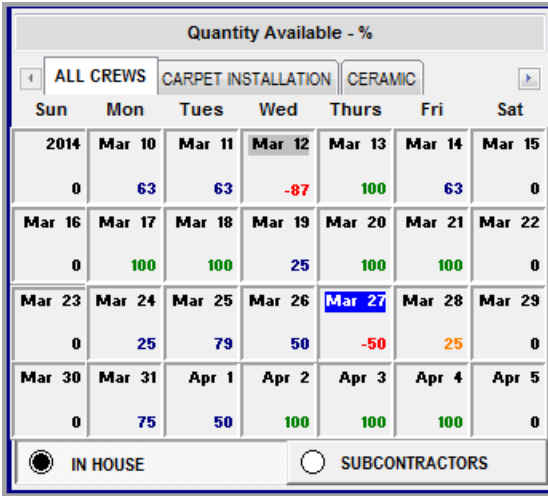


Figure ALL Crews Tab

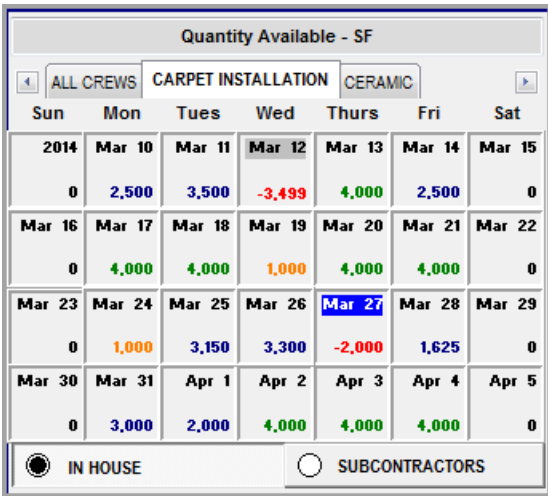


Figure Job Type Tabs

Deduct Crews from Installation Depot Capacities Based On

X (Module)>Utilities>System Options>Schedule Pro>Capacity Settings>Deduct Crews from Installation Depot Capacities Based On Category-Configuration

Type must be Global

Type	Module	Applies To	Category	Option	Value	Note
Global	Schedule Pro	Capacity Settings	Configuration	Deduct Crews from Installation Depot Capacities Based On	Automatically Calculate Based on Line Quantities	Depends on the "View Installation Depot Capacities By" Setting

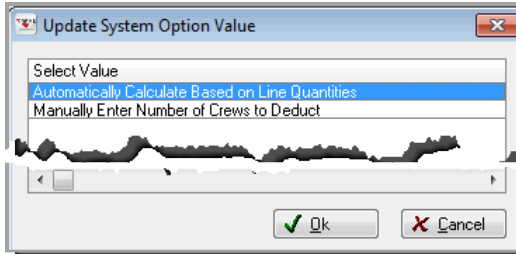


Figure Deduct Crews from Installation Depot Capacities Based On

This option allows the choice between automatically calculating based on line quantities or manually entering the number of crews to take off the capacities.

When the option Manually Enter Number of Crews to Deduct is selected, the deduct # of Crews defaults to one. Manually change it to the numbers needed.

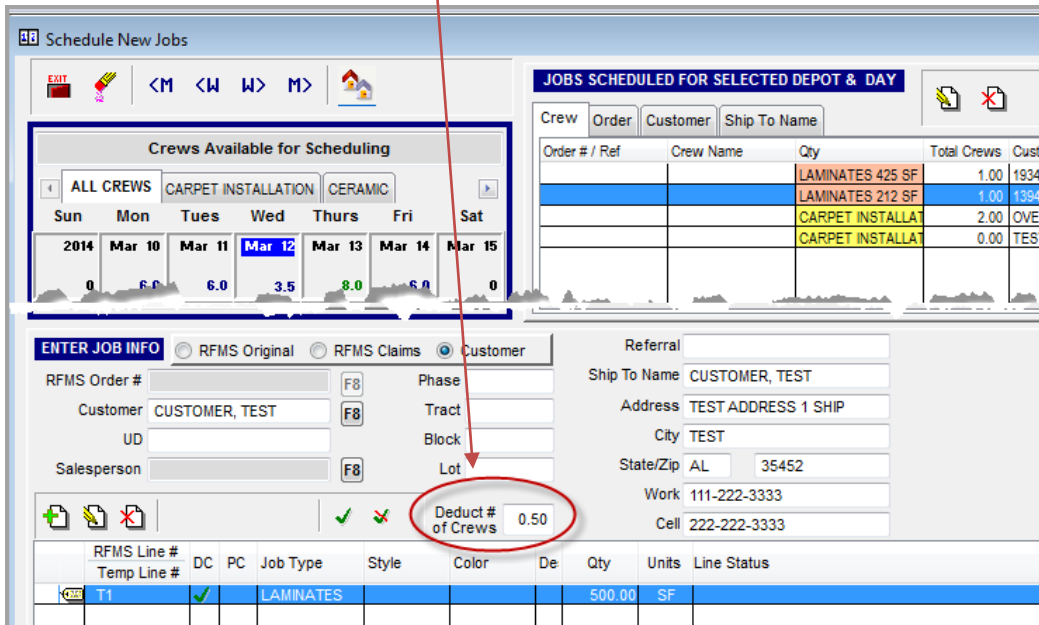


Figure Deduct # of Crews manually



Notes:

If automatic and a line are entered where the Unit of Measure does not match the Unit of Measure defined on the job type, then this line will not be deducted.

Combinations

Manually Entered Depot Capacities/Quantity Available/NA

System Options

Calculate Installation Depot Maximum Capacity Based On	Manually Entered Depot Capacities
View Installation Depot Capacities By	Quantity Available
Deduct Crews from Installation Depot Capacities Based On	NA

- Amount deducted from Depot Capacities is **NOT** based on Daily Qty Limit or Jobs per Day entered for individual crews.
- Amount deducted from Depot Capacities is **NOT** based on Crew Time Off data.

Installation Depot Total Capacity

Under the ALL CREWS tab in Schedule New Jobs, the capacity is displayed as % left for the day.

Quantity Available - %						
ALL CREWS CARPET INSTALLATION CERAMIC						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
2014	Mar 10	Mar 11	Mar 12	Mar 13	Mar 14	Mar 15
0	63	63	-87	100	63	0
Mar 16	Mar 17	Mar 18	Mar 19	Mar 20	Mar 21	Mar 22
0	100	100	25	100	100	0
Mar 23	Mar 24	Mar 25	Mar 26	Mar 27	Mar 28	Mar 29
0	25	79	50	-50	25	0
Mar 30	Mar 31	Apr 1	Apr 2	Apr 3	Apr 4	Apr 5
0	75	50	100	100	100	0

IN HOUSE SUBCONTRACTORS

Figure ALL Crews Tab

Under the JOB TYPE tabs, the manually entered quantity available for each job type each day is shown.

Quantity Available - SF						
ALL CREWS CARPET INSTALLATION CERAMIC						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
2014	Mar 10	Mar 11	Mar 12	Mar 13	Mar 14	Mar 15
0	2,500	3,500	-3,499	4,000	2,500	0
Mar 16	Mar 17	Mar 18	Mar 19	Mar 20	Mar 21	Mar 22
0	4,000	4,000	1,000	4,000	4,000	0
Mar 23	Mar 24	Mar 25	Mar 26	Mar 27	Mar 28	Mar 29
0	1,000	3,150	3,300	-2,000	1,625	0
Mar 30	Mar 31	Apr 1	Apr 2	Apr 3	Apr 4	Apr 5
0	3,000	2,000	4,000	4,000	4,000	0

IN HOUSE SUBCONTRACTORS

Figure Job Type Tab

Crew Assigned Deduction

ALL - For each Job Type the following will be calculated and subtracted from the All Tab

- For Jobs where Scheduled Install Date = Calendar Date and Job Depot = Current Depot
- $\text{Sum}(\text{Line Qty} / \text{Depot Daily Qty Limit for Line Job Type}) * (1 / \# \text{ of Job Types with Capacities Entered for Depot})$

- Job Type - The following will be calculated and subtracted from the Job Type Tab Available Capacity
- For Jobs where Job Type = Job Type Tab and Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Assigned
 - Sum(Line Qty)

No Crew Assigned Deduction

- ALL - For each Job Type the following will be calculated and subtracted from the All Tab
- For Jobs where Scheduled Install Date = Calendar Date and Job Depot = Current Depot
 - Sum(Line Qty / Depot Daily Qty Limit for Line Job Type) * (1 / # of Job Types with Capacities Entered for Depot)

- Job Type - The following will be calculated and subtracted from the Job Type Tab Available Capacity
- For Jobs where Job Type = Job Type Tab and Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Not Assigned
 - Sum(Line Qty)

Manually Entered Depot Capacities/Number of Crews Available/Manually Enter Number of Crews to Deduct

System Options

Calculate Installation Depot Maximum Capacity Based On	Manually Entered Depot Capacities
View Installation Depot Capacities By	Number of Crews Available
Deduct Crews from Installation Depot Capacities Based On	Manually Enter Number of Crews to Deduct

- Amount deducted from Depot Capacities is **NOT** based on Daily Qty Limit or Jobs Per Day entered for individual crews.
- Total Crews deducted for a Scheduled Job=Number of lines * Manually Entered Number of Crews to Deduct
- If no lines on a job have a Deduct Capacity Green Checkmark then no crews will be deducted from any calendar tab including ALL tab.

Installation Depot Total Capacity

Under the ALL tab, the manually entered total number of crews for that day of the week is displayed. It is not equal to the sum of job types.

Under the JOB TYPE tabs, the manually entered total number of crews for that job type for the day of the week.

Crew Assigned Deduction

ALL - Manually Entered Number of Crews to Deduct for All Jobs for Calendar Date for Depot where Crew Is Assigned

Job Type - Manually Entered Number of Crews to Deduct for Job Type for Calendar Date for Depot where Crew Is Assigned

No Crew Assigned Deduction

ALL - Manually Entered Number of Crews to Deduct for All Jobs for Calendar Date for Depot where No Crew Is Assigned

Job Type - Manually Entered Number of Crews to Deduct for Job Type for Calendar Date for Depot where No Crew Is Assigned

Warning Message: Installation Depot Overbooked for Day

ALL - If the Manually Entered Number of Crews to Deduct for all scheduled jobs for a date is greater than the Manually Entered Depot Capacity for All Crews, then the message will be triggered.

Manually Entered Depot Capacities/Number of Crews Available/Automatically Calculate Based on Line Quantities

System Options

Calculate Installation Depot Maximum Capacity Based On	Manually Entered Depot Capacities
View Installation Depot Capacities By	Number of Crews Available
Deduct Crews from Installation Depot Capacities Based On	Automatically Calculate Based on Line Quantities

- Amount deducted from Depot Capacities **IS** based on Daily Qty entered for individual crews.

Installation Depot Total Capacity

Under the ALL tab, the manually entered total number of crews for that day of the week is displayed. Under the JOB TYPE tabs, the manually entered total number of crews for that job type for the day of the week.

Crew Assigned Deduction

ALL - For each Job Type the following will be calculated and subtracted from the All Tab

- For Jobs where Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Assigned
- Sum(Line Item Qty / Crew's Daily Qty Limit for Line Job Type)

JOB TYPE - The following will be calculated and subtracted from the Job Type Tab Available Capacity

- For Jobs where Job Type = Job Type Tab and Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Assigned
- Sum(Line Item Qty / Crew's Daily Qty Limit for Line Job Type)

No Crew Assigned Deduction

ALL - For each Job Type the following will be calculated and subtracted from the All Tab

- For Jobs where Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Not Assigned
- Sum(Line Item Qty / Average Crew Daily Qty Limit for Line Job Type)

JOB TYPE - The following will be calculated and subtracted from the Job Type Tab Available Capacity

- For Jobs where Job Type = Job Type Tab and Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Not Assigned
- Sum(Line Item Qty / Average Crew Daily Qty Limit for Line Job Type)

Other Formulas

Average Crew Daily Qty Limit = Total Daily Qty Limit for Crews installing Job Type) / Number of Crews installing Job Type

Automatically Calculate Depot Capacities/Quantity Available

System Options

Calculate Installation Depot Maximum Capacity Based On	Automatically Calculate Depot Capacities
View Installation Depot Capacities By	Quantity Available
Deduct Crews from Installation Depot Capacities Based On	NA

- Capacities can be different for different days of the week.
- Amount deducted from Depot Capacities **IS** based on Daily ATY Limit entered for individual crews.
- Amount deducted from Depot Capacities **IS** based on Crew Time Off data.

Installation Depot Total Capacity

Under the ALL CREWS tab in Schedule New Jobs, the capacity is displayed as % left for the day.

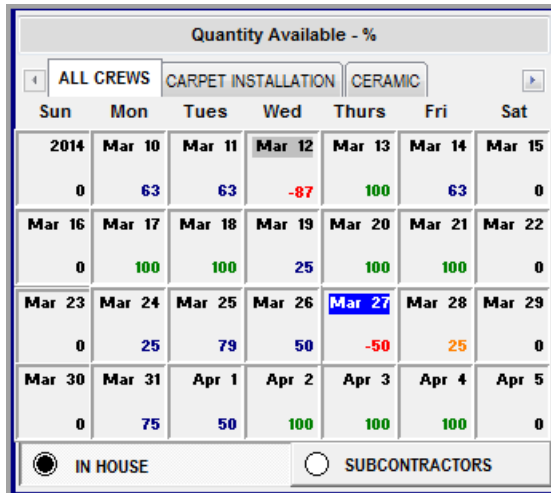


Figure ALL Crews Tab

Under the JOB TYPE tabs, the manually entered quantity available for each job type each day is shown.

Quantity Available - SF						
<input type="button" value="ALL CREWS"/> <input type="button" value="CARPET INSTALLATION"/> <input type="button" value="CERAMIC"/>						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
2014	Mar 10	Mar 11	Mar 12	Mar 13	Mar 14	Mar 15
0	2,500	3,500	-3,499	4,000	2,500	0
Mar 16	Mar 17	Mar 18	Mar 19	Mar 20	Mar 21	Mar 22
0	4,000	4,000	1,000	4,000	4,000	0
Mar 23	Mar 24	Mar 25	Mar 26	Mar 27	Mar 28	Mar 29
0	1,000	3,150	3,300	-2,000	1,625	0
Mar 30	Mar 31	Apr 1	Apr 2	Apr 3	Apr 4	Apr 5
0	3,000	2,000	4,000	4,000	4,000	0

IN HOUSE SUBCONTRACTORS

Figure Job Type Tab

Crew Assigned Deduction

ALL - For each Job Type the following will be calculated and subtracted from the All Tab

- For Jobs where Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Assigned
- $\text{Sum}(\text{Line Qty} / \text{Crew Daily Qty for Job Type}) / \text{Total Crews for all Job Types for DOW}$

JOB TYPE - The following will be calculated and subtracted from the Job Type Tab Available Capacity

- For Jobs where Job Type = Job Type Tab and Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Assigned
- $\text{Sum}(\text{Line Qty})$

No Crew Assigned Deduction

ALL - For each Job Type the following will be calculated and subtracted from the All Tab

- For Jobs where Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Not Assigned
- $(\text{Sum}(\text{Line Qty} / \text{Average Crew Daily Qty Limit for Line Job Type})) / \text{Total Number of Crews for the Depot}$

JOB TYPE - The following will be calculated and subtracted from the Job Type Tab Available Capacity

- For Jobs where Job Type = Job Type Tab and Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Not Assigned
- $\text{Sum}(\text{Line Qty})$

No Crew Assigned Crossover Deduction

ALL - Crossover Deduction is not calculated for the All Tab

JOB TYPE - For Each Cross Job Type (Job Type <> Job Type Tab_ the following will be calculated and subtracted from the selected Job Type Tab

- For Jobs where Job Type <> Job Type Tab and Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Not Assigned
- $((\text{Total Scheduled Qty for Cross Job Type} / \text{Total Crew Daily Qty for Cross Job Type}) * (\text{Total Crew Daily Qty for Job Type Tab where Crew Installs Cross Job Type}))$

Automatically Calculate Depot Capacities/Number of Crews Available/Manually Enter Number of Crews to Deduct

System Options

Calculate Installation Depot Maximum Capacity Based On	Automatically Calculate Depot Capacities
View Installation Depot Capacities By	Number of Crews Available
Deduct Crews from Installation Depot Capacities Based On	Manually Enter Number of Crews to Deduct

- Total Crews deducted for a Scheduled Job=Number of Lines * Manually Entered Number of Crews to Deduct
- If no lines on a job have a Deduct Capacity Green Checkmark then no crews will be deducted from ANY calendar tab including ALL tab.
- Amount deducted from Depot Capacities **IS** based on Daily Qty Limit entered for individual crews. Used **ONLY** in Crossover Deduction
- Amount deducted from Depot Capacities **IS** based on Crew Time Off data. Used **ONLY** in Crossover Deduction.

Installation Depot Total Capacity

ALL-This represents the total number of crews with a daily qty entered for ANY Job Type for that day of the week.

JOB TYPE-This represents the total number of crews with a daily qty entered for that JOB TYPE for that day of the week.

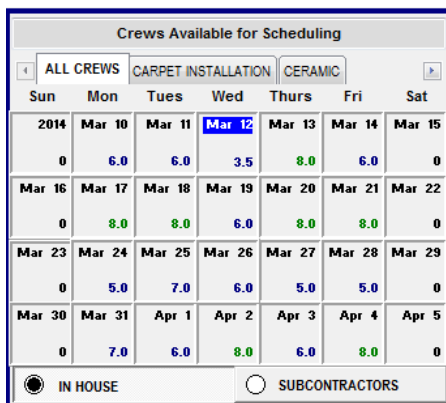


Figure ALL CREWS Number of Crews

Crew Assigned Deduction

ALL – This option shows manually Entered Number of Crews to Deduct for ALL Jobs for Calendar Date for Depot where Crew Is Assigned.

JOB TYPE – this option shows manually Entered Number of Crews to Deduct for Job Type for Calendar Date for Depot where Crew Is Assigned.

No Crew Assigned Deduction

ALL - Manually Entered Number of Crews to Deduct for ALL Jobs for Calendar Date for Depot where No Crew Is Assigned

JOB TYPE – this option shows manually Entered Number of Crews to Deduct for Job Type for Calendar Date for Depot where No Crew Is Assigned.

No Crew Assigned Crossover Deduction

ALL- Crossover Deduction is not calculated for the All Tab

JOB TYPE-

- For Each Cross Job Type (Job Type <> Job Type Tab) the following will be calculated and subtracted from the selected Job Type Tab
- For Jobs where Job Type <> Job Type Tab and Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Not Assigned
- Total of Manually Entered Crews to Deduct for Cross Job Type * (Total of Crew Daily Qty for Job Type Tab where Crew Installs Cross Job Type / Total of Crew Daily Qtys for Job Type Tab)
- Ex: On the Tile Tab - For Each Job Type <> Tile calculate and subtract the following from the Tile Tab
 - Total of Manually Entered Crews to Deduct for Carpet * (Total Tile Daily Qty for all Crews that Install Carpet / Total Tile Daily Qty for Crews)
 - Total of Manually Entered Crews to Deduct for Hardwood* (Total Tile Daily Qty for all Crews that Install Hardwood / Total Tile Daily Qty for Crews)

Automatically Calculate Depot Capacities/Number of Crews Available/Automatically Calculate Deduct Based on Line Quantities

System Options

Calculate Installation Depot Maximum Capacity Based On	Automatically Calculate Depot Capacities
View Installation Depot Capacities By	Number of Crews Available
Deduct Crews from Installation Depot Capacities Based On	Automatically Calculate Deduct Based on Line Quantities

- Capacities can be different for different days of the week.
- Amount deducted from Depot Capacities **IS** based on Daily ATY Limit entered for individual crews.
- Amount deducted from Depot Capacities **IS** based on Crew Time Off data.

Installation Depot Total Capacity

ALL-This represents the total number of crews with a daily qty entered for ANY Job Type for that day of the week.

JOB TYPE-This represents the total number of crews with a daily qty entered for that JOB TYPE for that day of the week.

Crews Available for Scheduling						
ALL CREWS CARPET INSTALLATION CERAMIC						
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
2014	Mar 10	Mar 11	Mar 12	Mar 13	Mar 14	Mar 15
0	6.0	6.0	3.5	8.0	6.0	0
Mar 16	Mar 17	Mar 18	Mar 19	Mar 20	Mar 21	Mar 22
0	8.0	8.0	6.0	8.0	8.0	0
Mar 23	Mar 24	Mar 25	Mar 26	Mar 27	Mar 28	Mar 29
0	5.0	7.0	6.0	5.0	5.0	0
Mar 30	Mar 31	Apr 1	Apr 2	Apr 3	Apr 4	Apr 5
0	7.0	6.0	8.0	6.0	8.0	0

IN HOUSE SUBCONTRACTORS

Figure ALL CREWS Number of Crews

Crew Assigned Deduction

ALL - For each Job Type the following will be calculated and subtracted from the All Tab

- For Jobs where Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Assigned
- $\text{Sum}(\text{Line Qty} / \text{Crew's Daily Qty Limit for Line Job Type})$

JOB TYPE - The following will be calculated and subtracted from the Job Type Tab Available Capacity

- For Jobs where Job Type = Job Type Tab and Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Assigned
- $\text{Sum}(\text{Line Qty} / \text{Crew's Daily Qty Limit for Line Job Type})$

No Crew Assigned Deduction

ALL - For each Job Type the following will be calculated and subtracted from the All Tab

- For Jobs where Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Not Assigned
- $\text{Sum}(\text{Line Qty} / \text{Average Crew Daily Qty Limit for Line Job Type})$

JOB TYPE - The following will be calculated and subtracted from the Job Type Tab Available Capacity

- For Jobs where Job Type = Job Type Tab and Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Not Assigned
- $\text{Sum}(\text{Line Qty} / \text{Average Crew Daily Qty Limit for Line Job Type})$

No Crew Assigned Crossover Deduction

ALL- Crossover Deduction is not calculated for the All Tab

JOB TYPE - For Each Cross Job Type (Job Type <> Job Type Tab_ the following will be calculated and subtracted from the selected Job Type Tab

- For Jobs where Job Type <> Job Type Tab and Scheduled Install Date = Calendar Date and Job Depot = Current Depot and Crew = Not Assigned
- (**Total Scheduled Qty for Cross Job Type** * **Total Crew Daily Qty for Job Type Tab where Crew Installs Cross Job Type** * (**Number of Crews that Install Cross Job Type** / **Total Crew Daily Qty for Cross Job Type**)) / **Total Crew Daily Qty for Cross Job Type**

Schedule New Jobs Screen

Total Crews column

On the Scheduled New Jobs Screen, a new column was added to display the total number of crews deducted. The ALL tab will show the total number of crews for the entire job. For JOB TYPE tabs, the total number of crews for the job for that job type will display.

Order # / Ref	Crew Name	Primary Qty	Total Crews	Customer	Ship To Name
	COLLAZO, JESUS	CARPET 1500 SF	2.00	QUARLES, TONY	
CG401027	BOOTH, JAMES	CARPET 450 SF	1.00	PREWITT'S CONTR	

Figure Total Crews



Notes:

- The manually number of crews to deduct will default to 1.
- This only applies to users who are set to manually deduct the number of crews per job.

Primary QTY column

For specific JOB TYPE tabs, the Qty column will show the total qty of the job type scheduled for that job type.

Order # / Ref	Crew Name	Qty	Total Crews	Customer
	COLLAZO, JESUS	CARPET 1500 SF	2.00	QUARLES, TONY
	BELLE	CARPET 275 SF	1.00	RUBY AVERY
CG401027	BOOTH, JAMES	CARPET 450 SF	1.00	PREWITT'S CONTR

Figure Primary Qty



Notes:

- On the Jobs Scheduled Browse Screen, the Qty column data now only adds in quantities scheduled for the selected calendar date. For the ALL tab, it will display the primary quantity for the job for the selected calendar date