



Systems for Success

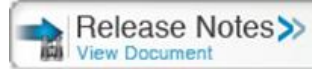
A large decorative graphic on the right side of the page, consisting of three overlapping, wavy, curved bands. The top band is light gray, the middle band is dark red, and the bottom band is black. The text "Version 14.1.2 User Guide" is overlaid on the red and black bands.

# Version 14.1.2 User Guide

© RFMS, Inc.  
3073 Palisades Court  
Tuscaloosa, AL 35401  
Phone 205-553-5257 • Fax 205-862-8788

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.






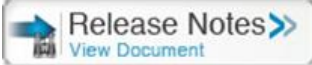
To see what you may have missed in previous updates click here.
































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


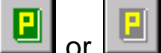
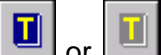


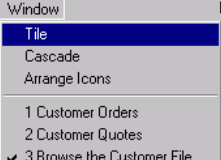



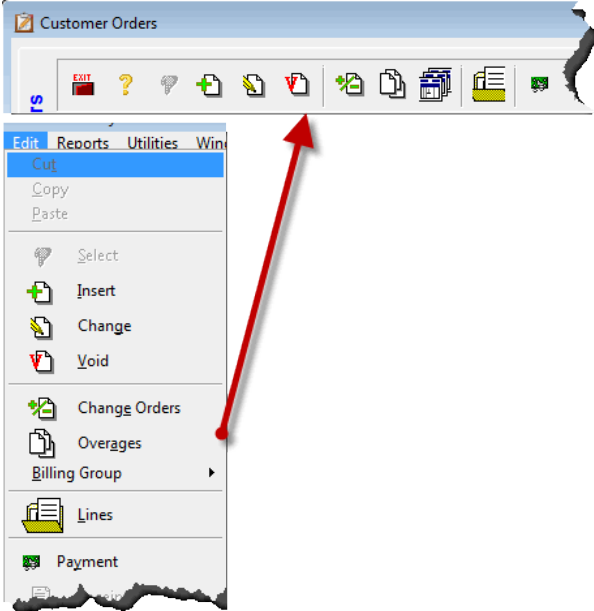
The same documentation is included in the on-line help system and can be accessed by pressing the F1 button at any RFMS screen. If there is something on the screen that you either don't recognize or understand, check this document or refer to the Help Files pressing F1.

## Documentation Conventions

|   |   |
|---|---|
|  <b>Notes:</b> | Indicates extra Information   |
|               | This symbol indicates a best practice, or an example.   |
| <u>Setup</u> > <i>System Setup</i>  | 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.  |
| <b>Field Name</b>   | Indicates a Field Name or button Name   |
| <b>Important</b>  | 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.   |
| <a href="#">Links to other topics</a>   | 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!   |
| <b>User Defined FIELD</b>   | 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 1608 1313 1703" style="border: 1px solid gray; padding: 5px; margin: 10px 0;">                         UD JOB # <input type="text"/><br/>                         UD HEADER LABEL 1 <input type="text"/><br/>                         UD HEADER LABEL 2 <input type="text"/> </div> |
| <b>Update Release Notes</b>   | 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

|   |  |
|---|--|
|       | <b>Exit</b> the current screen. Can also use the <b>Escape</b> key on the keyboard.  |
|    | Access the <b>help</b> file. Can also use the <b>F1</b> Key on the keyboard.   |
|    | Activates or <b>selects</b> the highlighted record.  |
|       | <b>Add</b> a new record. Can also use the <b>Insert</b> key on the keyboard.   |
|       | Make <b>changes</b> to a record.   |
|       | <b>Delete</b> a record.  |
|       | Add or View <b>Notes</b> on a record.  |
|    | View <b>all notes</b> and <b>Client Management Remarks</b> related to a record.  |
|       | <b>Find</b> a record using specific fields. Changes to blue when a find is in process.   |
|     | <b>Resets</b> a filter to the default settings.  |
|    | <b>Refresh</b> the browse without resetting the filters  |
|    | <b>Saves</b> the current information and <b>exits</b> the screen.  |
|    | <b>Exits</b> the screen without saving the newly entered information.  |
|    | <b>Exact</b> match required in a search.   |
|    | <b>Partial</b> match only required in a search.  |
|  or Ctrl-S   | <b>Text</b> search<br>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. |
|   | <b>Print</b> a document or go to a report menu.  |
|    | Allows adding, changing or deleting graphic, non-graphic files or web sites.   |
|    | <b>Tag</b> Untag Tagall or Un-tagall record(s). Selects records  |
|    | <b>View</b> details of a record.   |
|    | Send an email or <b>RFMS mail message</b> regarding the highlighted record.  |

|  |  |
|--|--|
|   | View the <b>history</b> of a record.   |
|   | View the <b>pdf history</b> of reports for the highlighted record.   |
|   | Click to view the <b>tracking</b> record created for every record insert made into Orders, Quotes and Bid Pro Estimates. If gray, no records are present.  |
|   | Brings up the <b>Client Management remote actions screen</b> 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 <b>date</b> fields in RFMS, hit the <b>D</b> 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 <b>F8</b> 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>&gt;Utilities&gt;System Options&gt;System Wide&gt;General &gt;(Set Up Global Interface System Options or Override Global Interface System Options)</i>  |
|  | Required Field. If set in <i>&gt;Utilities&gt;System Options&gt;System Wide&gt;General &gt;(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>&gt;Edit&gt;</i></p>   |

# Table of Contents

**SYSTEM WIDE .....6**  
    System Options ..... 6

**ORDER ENTRY .....6**  
    Billing Groups ..... 6

**INVENTORY .....6**  
    Purchase Orders ..... 6

**HUMAN RESOURCES .....6**  
    Paychex Payroll-Journal CSV ..... 6  
    Year End Report for Australia ..... 7

---

---

# System Wide

---

## System Options

The system option “Populate Hours From Job Into Providers Regular Time Field” has been deleted. Since the Provider Record now has two fields - one for hours and one for units, every record from Schedule Pro is being posted.

# Order Entry

---

## Billing Groups

The Add New Order, Carry forward Customer information button will carry forward Ship-To (Name, Address #1, Address #2, City, State, Zip, County), Sold-To (Name, Address #1, Address #2, City, State, Zip, County), Telephone #1, Telephone #2, Job Number, Customer Type, Salesman #1 and Salesman #2.

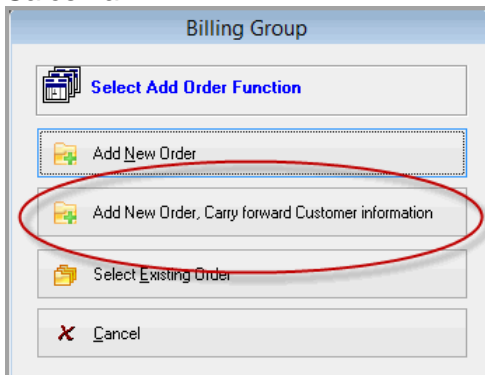




Figure Add New Order, Carry Forward Customer Information

# Inventory

---

## Purchase Orders

Purchase order browse screen is defaulted to not show cancelled POs or satisfied POs.

If the Find Icon is blue  not black , then the find is being used not the default settings.

The find screen is sticky to the last settings.

# Human Resources

---

## Paychex Payroll-Journal CSV

Paychex can now receive a journal CSV file reflecting their payroll posting and import into RFMS by following these steps.

1. Select the Store for the Journal postings
2. Select the import file
3. Confirm the file selected.
4. When successful, a choice is given to delete the import file.

---

## Year End Report for Australia

The Year End Report for Australia is now included in Human Resources.