



Systems for Success

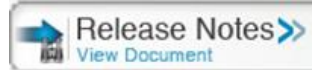
A large decorative graphic on the right side of the page, consisting of three overlapping, wavy, curved shapes. The top shape is light gray, the middle is dark red, and the bottom is black. The text "Version 14.2 User Guide" is overlaid on the red and black sections.

# Version 14.2 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.







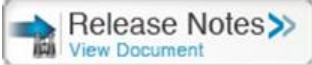
To see what you may have missed in previous updates click here.
































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


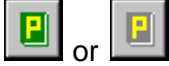
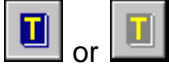


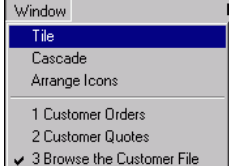



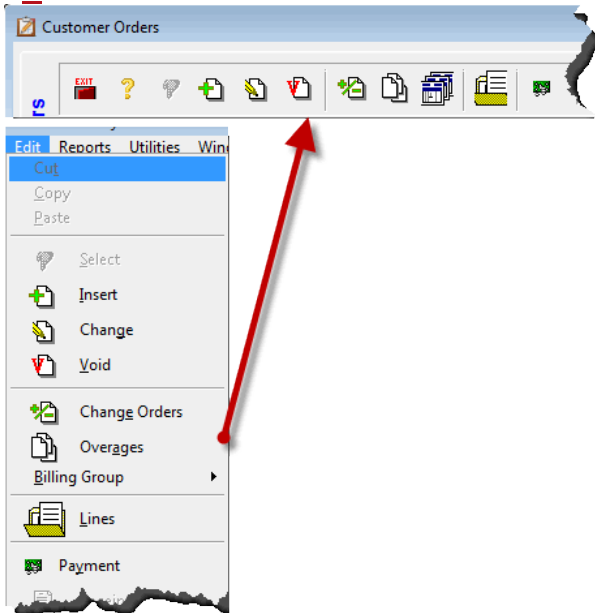
The same documentation is included in the on-line help system and can be accessed by pressing the F1 button at any RFMS screen. If there is something on the screen that you either don't recognize or understand, check this document or refer to the Help Files pressing F1.

## 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.
<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!
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. 
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. Click the release notes button to find these. 

## 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 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><b>&gt;Edit&gt;</b></p> 

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# System Wide

## Microsoft Office Changes

CMM integration with Microsoft Office has been enhanced. Due to this upgrade, Office 2007 or later is required for Microsoft Office tools inside of RFMS to function properly.

## System Options

### Country

*x>Utilities>System Options>System Wide>General>Category Configuration*

**Type- Must be Global** 🚫

The United Kingdom has been added to the Country System Option.

If set to United Kingdom:

- The state field is changed to County.
- Dollars has been changed to pounds.
- VAT Taxes are enabled.

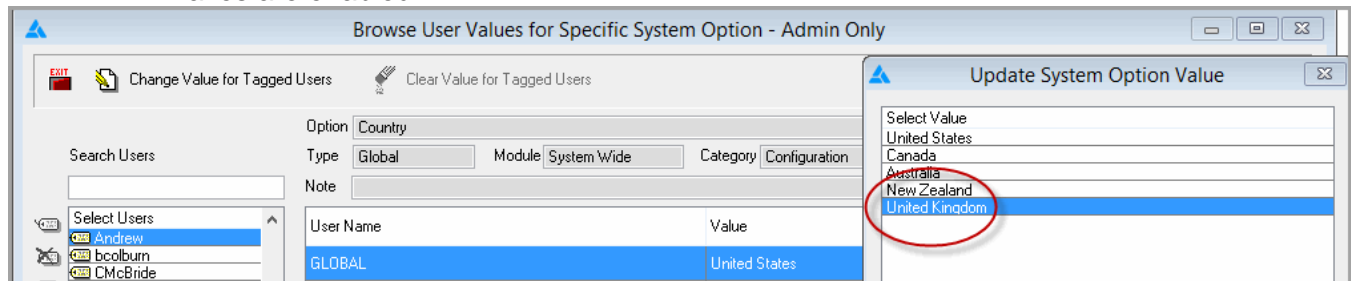


Figure Country System Option



#### Notes:

For the pound symbol to appear, go to change the currency setting on the computer. Go to *Control Panel>Region and Language>Additional Settings>Currency*

### Display Item Vendor

*X>Utilities>System Options>Order Entry>Products or x>Utilities>System Options>Sales Floor Assistant>Products Category Display*

**Type- Can be Global, Assigned or User**

The words (Supplier and /or Manufacturer) have been added to the end of the Display Item Vendor system option to make it easier to understand.

## Set Up Font to Use on the Notes Screen

*x>Utilities>System Options>System Wide>General>Category Interface*

**Type- Can be Global, Assigned or User**

A default font for the notes can be set in System Options. This setting applies to all notes screens in RFMS.

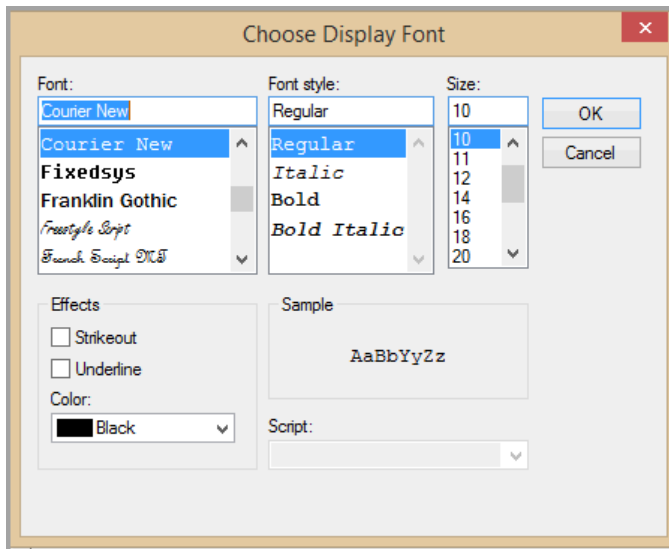


Figure Choose Default Font Screen

## Set New Line Price-Allow Enter New Price

*x>Utilities>System Options>Order Entry>Order Entry>Category Configuration*

**Type- Can be Global, Assigned or User**

The Default value is Yes. This allows users to choose a new price level manually. If the option is set to no, then the user cannot change to a New Price or change the Line Total manually.

## Telephone 1 Required in Order, Quotes or Claims

*x>Utilities>System Options>Order Entry>Order Entry>Category Configuration*

**Type- Can be Global, Assigned or User**

This option is now available to specify if Telephone #1 is a required field. The possible values are

- None
- All Order, Quotes and Claims
- Order Only

- Quote Only
- Claim Only
- Orders and Quotes
- Orders and Claims
- Quotes and Claims

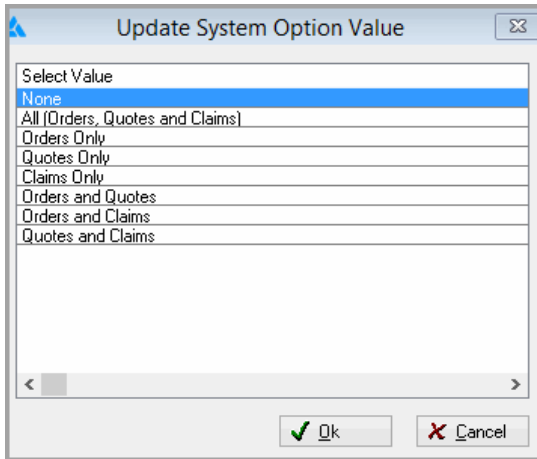


Figure Value Screen for Option

## Notes

### Spell Check

Spell check is now available on Notes throughout the system.

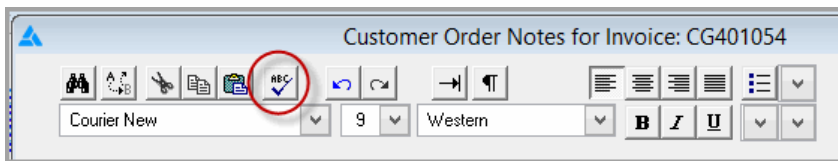


Figure Notes-Spell Check



Notes:

When typing, the word will not be underlined or highlighted as misspelled. Click the spell check button on the toolbar for spell check to begin.

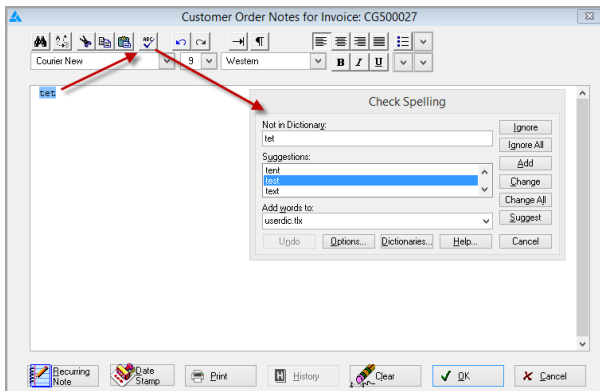


Figure Note Screen/Spell Check Screen

## Recurring Notes

The Recurring Notes can now contain up to 5000 characters.

# Order Entry

## Orders

### Find Screen

Order Find Screen now has a checkbox for “All Lines Delivered”. This switch is available if “Delivery Date Options” is “Undelivered Only.” This help identify order which may be ready to job cost.

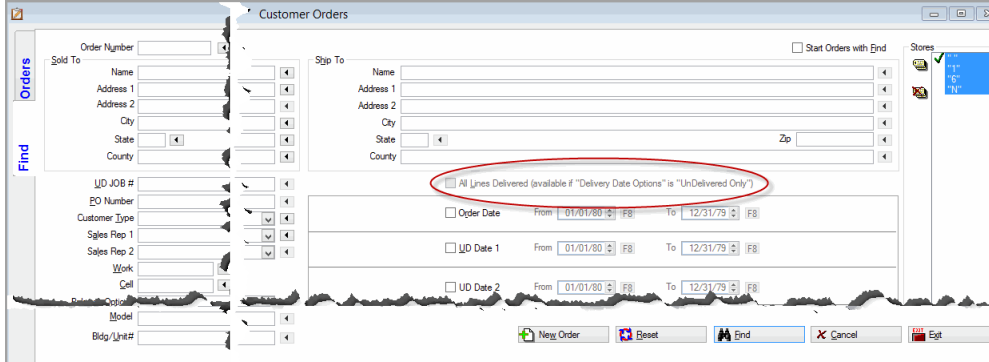


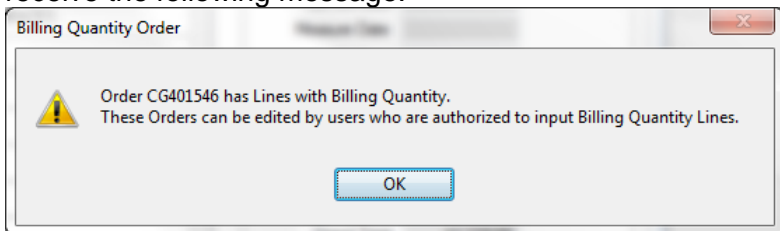
Figure Find Screen

### Billing/Shipping Quantity

With version 14.2, the billing and shipping quantity area in Order Entry and BidPro have been reconstructed.

For Billing Quantities to be allowed, the System Option “Allow Billing Quantities” must be set to yes. This system option can set to Global, Assigned or User.

If a user who is not allowed to edit Billing Quantity Orders tries to edit a Billing Order, the user will receive the following message.



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

## Order Browse

A Dye/Run Lot Column has been added to the Edit Order Lines Browse and View Order Lines Browse.

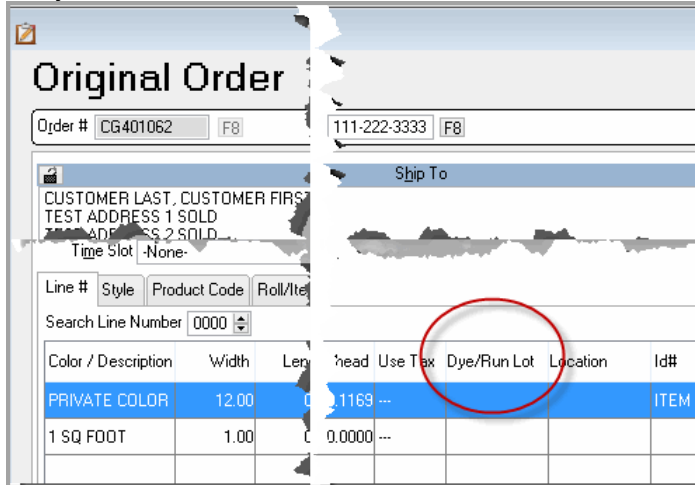


Figure Order Line Browse

## Line Groups

If a line with a Group # is re-selected and the new selection's Product Code has a default Line Group, it will be assigned to the default Line Group #. If the new selection does not have a default Line Group, the existing Group number will be left as is.

## Config Creator

*Order Entry>Utilities>Set Up>Config Creator*

This utility will allow invoices to be formatted to a company's needs. It will give the company the ability to create many different styles of invoices/acknowledgements and the choice of which one to print each time. To read more details on this utility, click [here](#).



### Notes:

The created documents are global not user specific.

## Printing Invoices

The ability to PDF to disc, Email PDF and Save to PDF History can now be done without printing the Invoice.

The box Print Invoice must be checked for an invoice to print.

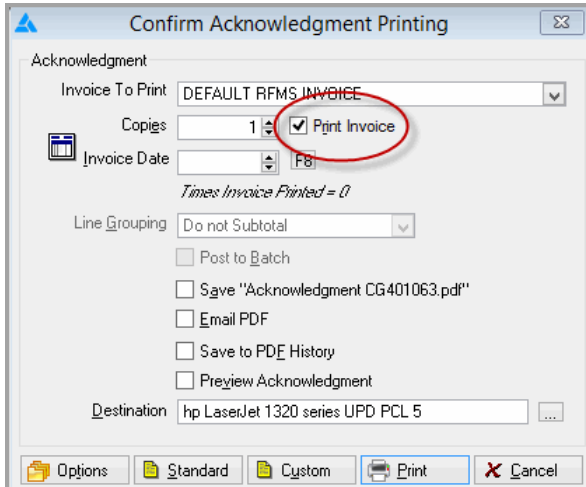


Figure Print Invoice

If the box is not checked, the ability to PDF to disc, Email PDF and Save to PDF History still exist.

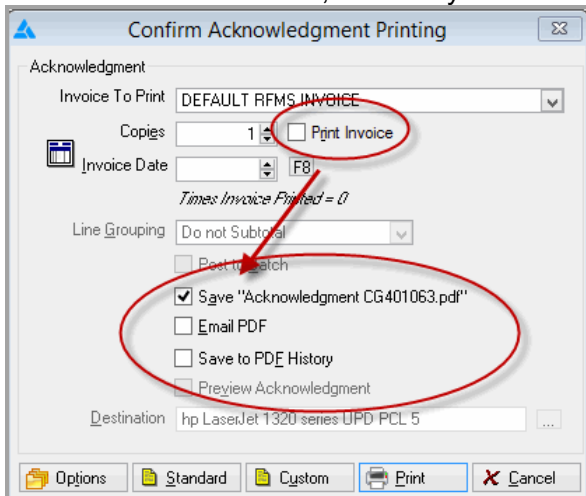


Figure Do Not Print Invoice

If none of these are checked then the Print button will be disabled.

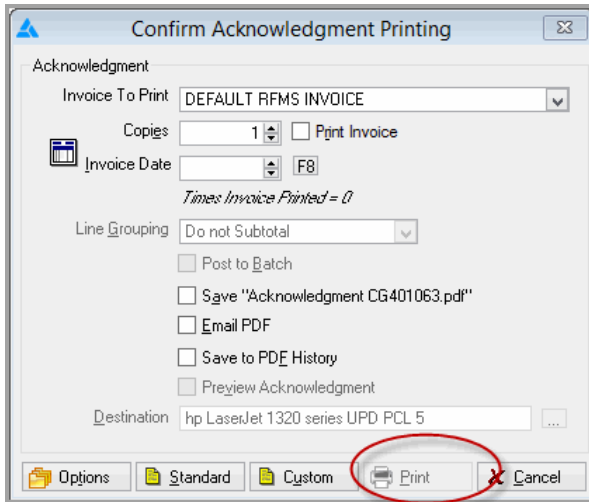


Figure Print Disabled



**Notes:**

The Print Invoice checkbox is sticky.

**California Recycle Assessment**

The standard RFMS invoice and quote have been adjusted to read “CA Crpt Stewardship Assessment” as outlined by Carpet America Recovery Effort (CARE). This change will be available in the update to be released at the end of October. If you have a custom configuration and do business in California please email [configs@rfms.com](mailto:configs@rfms.com) and request that your custom Invoice and or Quote be adjusted as well.

MY NEW STORE 82 SKYLAND BLVD TUSCALOOSA, AL 34758 Telephone: 205-943-2282 Fax: 205-943-2283					Page 1	
ACKNOWLEDGMENT					CG401072	
<b>Sold To</b>		<b>Ship To</b>				
PRICE LEVEL CUSTOMER		PRICE LEVEL CUSTOMER				
AKRON, AL 35441		AKRON, AL 35441				
<b>Order Date</b>	<b>Work</b>	<b>PO Number</b>	<b>Order Number</b>			
10/06/14			CG401072			
<b>Inventory</b>	<b>Style/Item</b>	<b>Color/Description</b>	<b>Quantity</b>	<b>Units</b>	<b>Price</b>	<b>Extension</b>
	5000	PRESSURE SENSIT	90.00	SF	17.61	1,584.90
	CANYON CREEK 12	WARM GRAY	12.00	SF	2.20	26.40
<b>Standard Invoice Note (message)</b>						
This is where you type your disclaimer.						
- 10/13/14 - Sales Representative(s): TERRY WHEAT						12:40PM Sub Total: 1,611.30 Sales Tax: 161.13 Misc. Tax: 0.00 CA Crpt Stewardship Assessment: 0.50
Acknowledge Message from System Options CA Crpt Stewardship Assessment						<b>INVOICE TOTAL: \$1,772.93</b>  Less Payment(s): 0.00 <b>BALANCE DUE: \$1,772.93</b>

Figure CA Crpt Stewardship Assessment Invoice

## Email on Browse

The email listed in the Customer file will be displayed in the details to the right on the Orders and Quotes Browse.

Sold To  
 123456789022345678903263456789042345678  
 9052345678906234567890  
 AKRON, AL 35441  
 County: HALE

Ship To  
 123456789022345678903263456789042345678  
 9052345678906234567890  
 AKRON, AL 35441  
 County: HALE

Email email@rfms.com

Work

Figure Orders Browse Screen

## Provider

If a Provider Record is tied to an A/P, the Supplier and Invoice Number will be shown in the grid.

Delivered	Installed	Date Paid	HR Paid	HR Check	Pay Type	Stc Tied To
	10/08/14	10/08/14			Subcontractor	"1" TEST TEST567
	10/08/14				Hourly	"1"

Figure Provider Grid

## Billing Groups

PDF History can now be viewed in Billing Groups.

Billing Group No. 662

Project Inform  
 Primary Order PROJECT #662  
 Project Inform: 1

Contract  
 Retainage Amount \$0.00

5,634.67 Material Cost 3,600.00  
 0.00 Service Cost 420.00  
 Overhead Margin 140.27  
 Freight Cost 1,200.00  
 Load 0.00  
 Tax Cost 234.00

View PDF History

Figure Billing Group Toolbar

## Provider Records

Hourly workers can now have the Total Earnings calculated based on a unit rate and quantity. They are still paid as hourly workers. The hourly rate will be based on the Total Earnings/Hours. To use this feature, check the calculate earnings by units box on the provider record.

For example:

A worker can be paid to do a job at the rate of \$.35 per unit for 100 units which equals \$350. The Regular Hours field will default to 1 and the hourly rate will be \$350 for payroll and reporting purposes.

Adding a Provider Record

Provider

Worker Information  
 Name EMPLOYEE, HOURLY  
 Worker # 215 Pay Type Hourly  
 Skill Level F8

Order Details  
 Invoice Number CG401078 F8 Order Date 10/17/14  
 Store 111 Delivery Date  
 Work Order # Installation Date 10/20/14 F8

Service  
 Product Code 84 F8 CARPET REMOVAL  
 Service and Service # TAKEUP RUBBERK.CPT TU/RBC F8

Unit Rate  
 Rate 0.3500  
 Load 0.00  
 Hours Worked: Regular Hours 1.00, Overtime Hours 0.00, Doubletime Hours 0.00, Actual Hourly Rate 35.00

Units Installed  
 Qty 100.00

Actual Earnings  
 Subtotal 35.00  
 Misc 0.00  
 Total \$35.00

Payment Details  
 Paid Date Paid  
 Special Period  
 Pay Status 000-OK to Pay  
 Do not Accrue

Total Earnings = (Unit Rate \* Qty) + Misc Earnings

OK Cancel

Figure Calculate Earnings by Units Example

## Job Costing

Order Entry>Edit>Job Cost

The ability was added to set the Line Grouping Subtotal Option on Invoices printed while job costing.

Confirm Job Cost for C

Parameters Additional Commissions

Sales Rep #1  
 Name ANDREW F8  
 Commission Schedule 001 - RETAIL 100.00%

Sales Rep #2

Invoice  
 Print Invoice  
 Copies 1  
 Line Grouping Subtotal by Description  
 Preview Invoice  
 Destination hp LaserJet 1320 series UPD PCL 5

Options Standard Custom

Figure Job Cost Screen

## Picking Tickets

Order Entry>Edit>Print>Picking Ticket

Picking Tickets no longer print a location if the line is in Gen PO status.

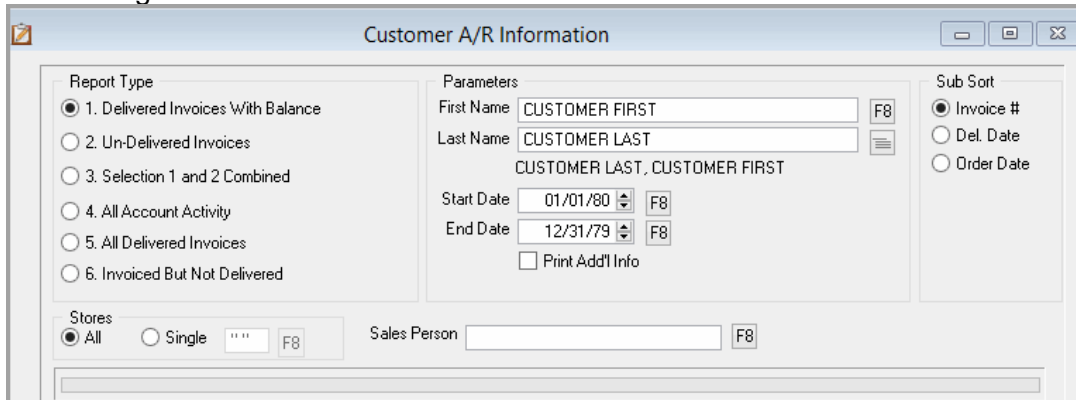
Page 1 07/16/14 10:53AM	<b>Picking Ticket</b> WHEAT'S CARPET ONE-FLOOR/HOME	Invoice: <b>CG401674</b>								
Sold To	Ship To	Pick Date: 07/16/14								
Customer Purchase Order: Sales Representative: JEFF THOMPSON Paid in Full: No										
Prod Code	Roll/Item No.	Width	Beginning Amount	Amount Required	Ending Amount	Units	Status	Location	Store	Sign
01	*Line # 0002 DERBY (S)BRUSH OH00XY3 Dye Lot C47371-10 Style#/Color#: 724U2/79700	12'0"	---	1'4"	---		Gen PO	---		
Picking Ticket Instructions										

Figure Picking Ticket Location Status

## Due Button

File>Customer Orders>List A/R button located on the toolbar.  or File Customer Orders>Edit>A/R

The ability to view the Invoiced But Not Delivered Report is now available here as well as from Accounting.



Customer A/R Information

Report Type

- 1. Delivered Invoices With Balance
- 2. Un-Delivered Invoices
- 3. Selection 1 and 2 Combined
- 4. All Account Activity
- 5. All Delivered Invoices
- 6. Invoiced But Not Delivered

Parameters

First Name: CUSTOMER FIRST [F8]

Last Name: CUSTOMER LAST [F8]

CUSTOMER LAST, CUSTOMER FIRST

Start Date: 01/01/80 [F8]

End Date: 12/31/79 [F8]

Print Add'l Info

Sub Sort

- Invoice #
- Del. Date
- Order Date

Stores

All  Single [F8] Sales Person [F8]

Figure Order Entry Due Button Screen

## Customer Pickup

The Change Qty and Get Signature button are now password protected.

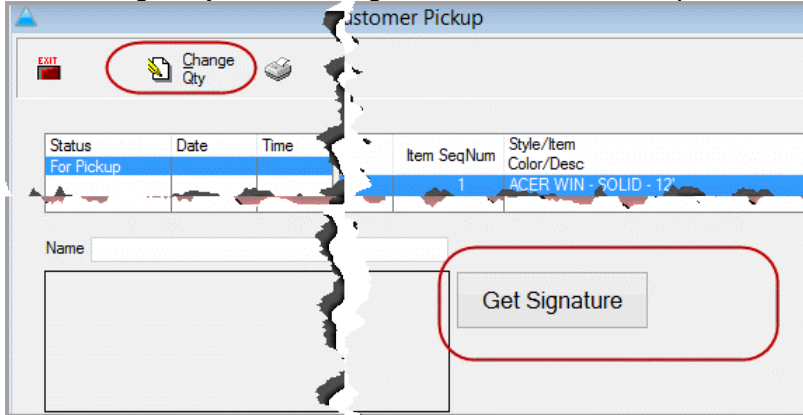
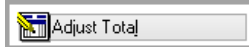


Figure Customer Pickup Screen

## Quotes

### Adjust Quote Total



This button will only show if the Quote does not have an Export Date and the Quote is not GST Included.

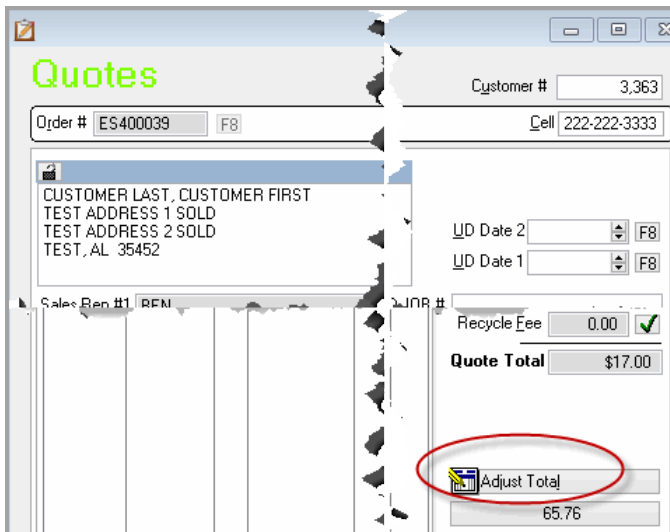


Figure Quote Screen

The following warning screen appears after clicking Adjust Total.

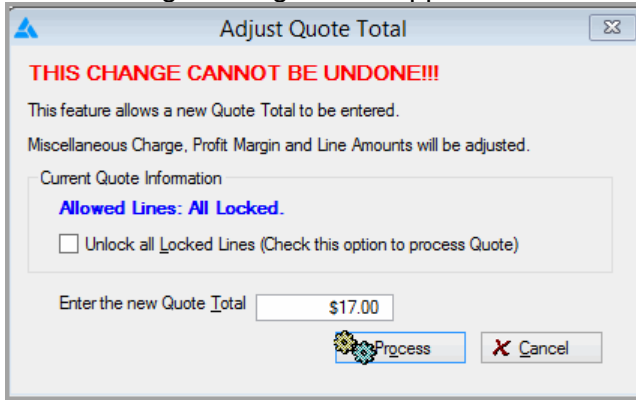


Figure Adjust Quote Total Warning

To be able to process a new Quote Total, check the Unlock all Locked Lines box. Then enter the new Quote Total. Click Process when complete

---

## Customer

### Customer Browse

The email will be displayed in the details to the right on the Customer Browse.

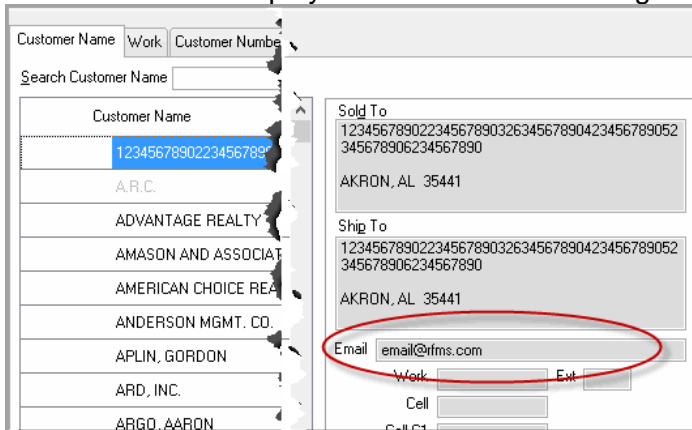


Figure Customer Browse

## Email Address

The system Option "Update quotes or BidPro customer information if customer is edited" now also applies to editing of customer email address.

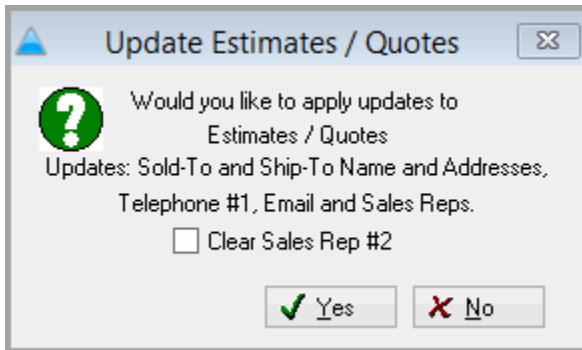


Figure Update Message

---

## Roll Inventory

*File > Roll Inventory*



### Find Screen

The ability to search by Style Number has been added.

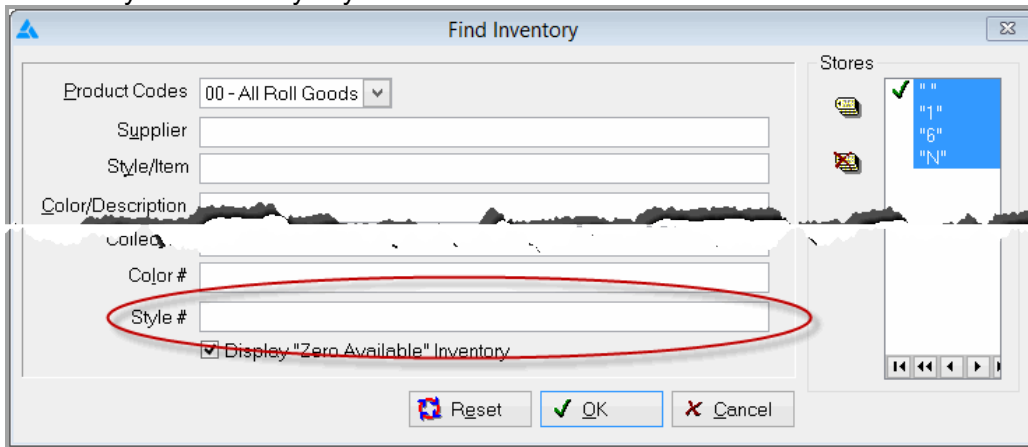


Figure Find Inventory Screen

---

# Reprint Job Cost Sheets

*Order Entry>Reports>Reprint Job Cost Sheets*

Job Costed Claims can now be reprinted from Reprint Job Cost Sheets.

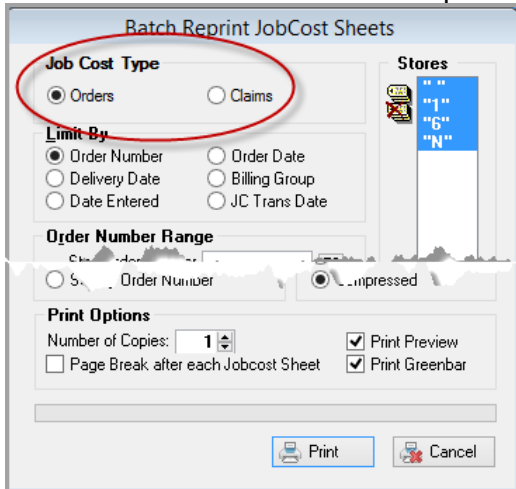


Figure Reprint Job Cost Sheets Screen

---

## Reports

### Provider Earnings/Provider's Earnings History Reports

*x>Reports>Provider Earnings or x>Reports>Provider's Earnings History*

The Provider Earnings and Provider's Earnings History Reports now have the option to report hours. This is very helpful for providers who have pay calculated by the unit, but have hours recorded, too.

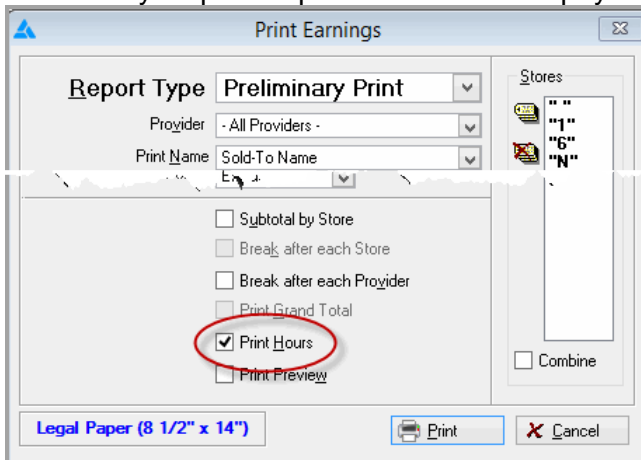


Figure Providers Earnings Report Screen

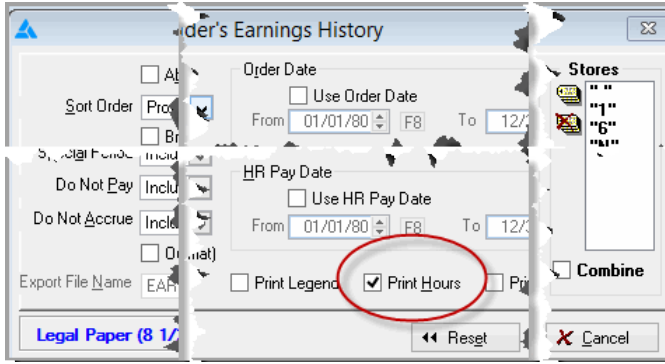


Figure Provider's Earnings History Report Screen

# Inventory

## Find Screen



*Inventory>File> (Roll or Item Inventory)>Find button* or *Inventory>File> (Roll or Item Inventory)>Edit>Find*

The field Color/Description Number has been added to the Roll Inventory and Item Inventory Find Screen.

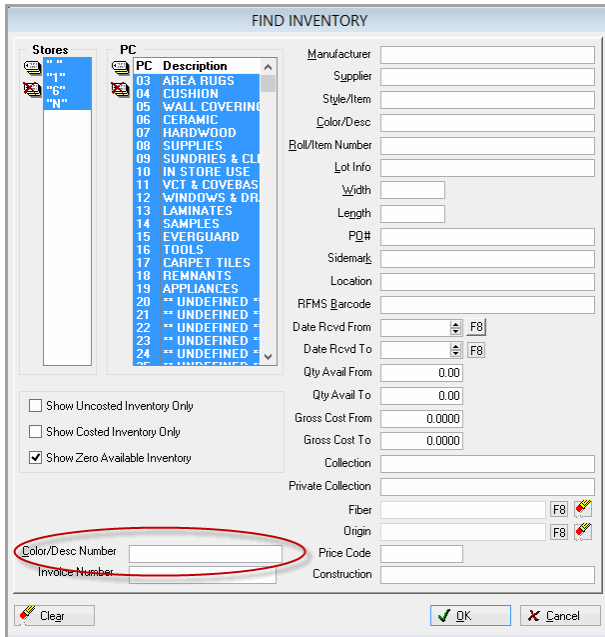


Figure Find Screen

---

# Roll Inventory

## Batch Roll Adjustment

*Inventory>Utilities>Batch Roll Adjustment*

Rolls can now be scrapped in a batch rather than individually. Rolls less than the amount entered will be automatically adjusted.

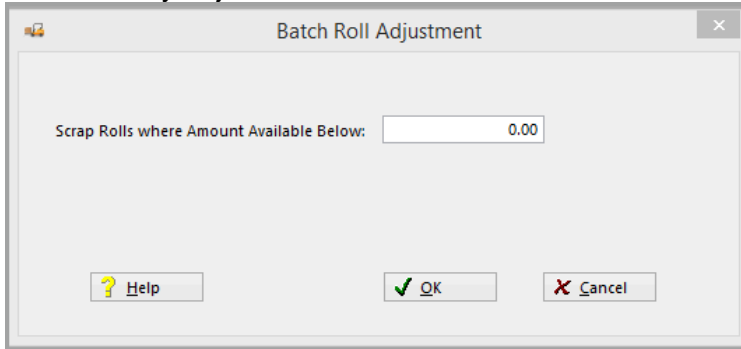


Figure Batch Roll Adjustment Screen



**Notes:**

A warning will be given if the amount enter is over 10.

For the adjustment to be made it is required to meet the following criteria:

- Received prior to Today's Date
- Amount available greater than zero and less than the amount entered
- Invoiced (Costed)
- Amount reserved equals zero
- Roll cannot have ANY order assignments except Job Costed

The Adjustment date will be set to Today's Date.

## Core Tags



*File>Roll Inventory>Edit>Print or File>Roll Inventory>*

A new Roll Core Tag has been added to the Print Tags list. It will fit on Avery Labels 5161 and includes Roll Number, Bar Code, Style and Color.



Figure Core Tag

# Item Inventory

The label Private Color # has been changed to Private Description # to be consistent with other RFMS modules.

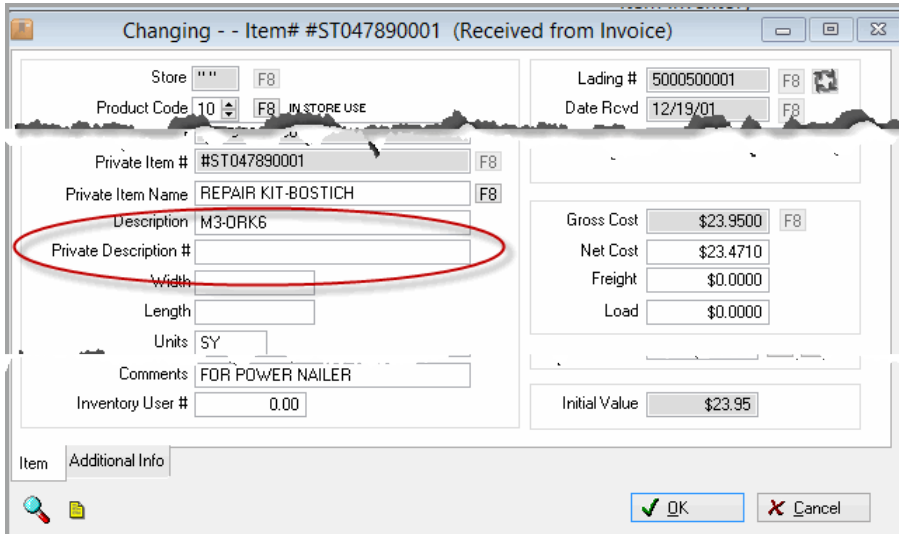


Figure Private Description #

# Price Calculator

*Inventory>Insert/Edit*

Load has been added to the Price Calculator

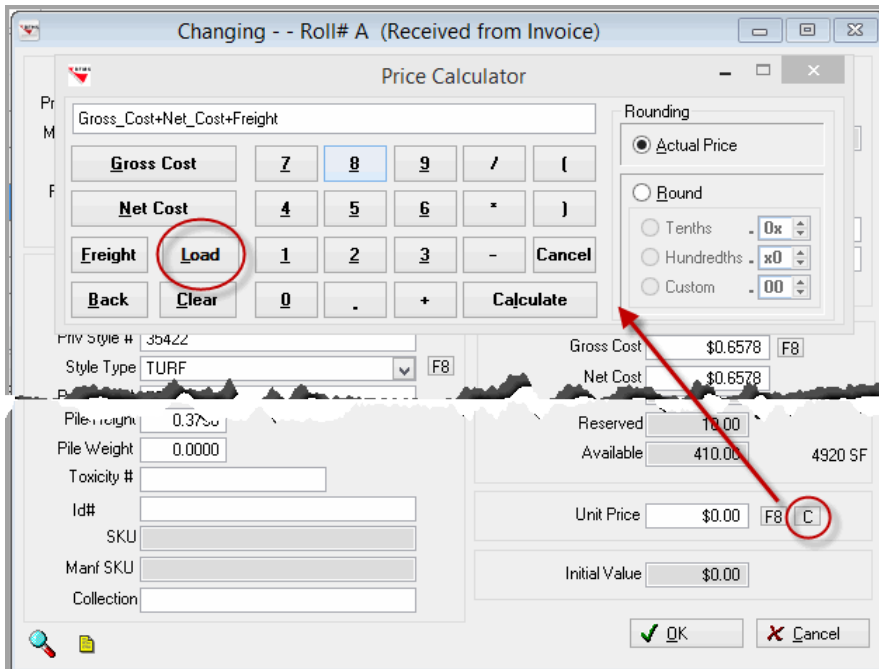


Figure Inventory Price Calculator

# Accounting

## Accounts Payable

### Suppliers

*File > Accounts Payable > Suppliers*

The Purchased amount for a supplier will now be calculated on the past 365 days not a Year to Date Number.

Supplier Update Screen

Figure Supplier Update Screen

### Check Writing

#### Flag Payables

*File > Accounts Payable > Check Writing > Flag Payables*

Payee has been added to the browse list.

Supplier	Invoice	Gross Amount	Disc. Rate	Net Due	Due
1099 SUPPLIER	123	135.00	0.00	135.00	03/31/14
1099 SUPPLIER	123456	100.00	0.00	100.00	09/23/14
80_4567890323456789032345678903234567890	TEST123	25.00	0.00	25.00	10/08/14

Figure Flag Payables Browse Screen

The tabs have been removed from this screen. Columns are now used to sort the list. The Search Box defaults to the column that is the current sort. If there is no current sort, the search will default to Supplier.

## A/P Reports

### A/P Invoice Listing

*File > Accounts Payable > A/P Reports > A/P Invoice Listing*

The ability to page break on suppliers is now available

A/P Invoice Listing

Beginning Date 01/01/80 F8  
Ending Date 12/31/79 F8  
Supplier

Print Options  
 Preview Report  
 Print All Detail  
 Break On Invoice  
 Page Break On Supplier  
 Output CSV To:

OK Cancel

Figure A/P Invoice Listing Print Screen

## General Ledger

*File > General Ledger > View Journal*

### View Journal Screen

The supplier name has been added to bottom of the View Journal Screen.

Journal Add/View/Edit

Act Code	Sub	Debit	Credit	Description	Chk Num	Inv num	Trans Date	Store	Comment	Batch Num	
641	00	250.17	0.00	MONTH END SUMMARY			01/31/11	**	COST OF CLAIM SUMMAR	12,032	
641	00	-1,630.48	0.00	SHAW INDUSTRIES			031112	02/14/11	**	ADD PAYABLE	9,899
641	00	1,630.48	0.00	SHAW INDUSTRIES			031112	02/14/11	**	EDIT PAYABLE	9,918
641	00	-1,630.48	0.00	SHAW INDUSTRIES, INC			031112	02/14/11	**	EDIT PAYABLE	9,918

Supplier SHAW INDUSTRIES Boll/Item # BOL  
A/P Inv. # 031112 Item Seq # 0 UD JOB #  
PO # OE Inv. # AP Detail Comment  
Provider OE Line # 000000

Figure View Journal Screen

---

## Month End

### Print Tax Due Report

*File>Month End>Tax Reports>Print Tax Due*

A column has been added to the CSV for the untaxed amount of the invoice.

### Month End Inventory Balance Report

*File>Month End>Month End Inventory Balance Report*

The Item System Reference Number has been added to the CSV output.

---

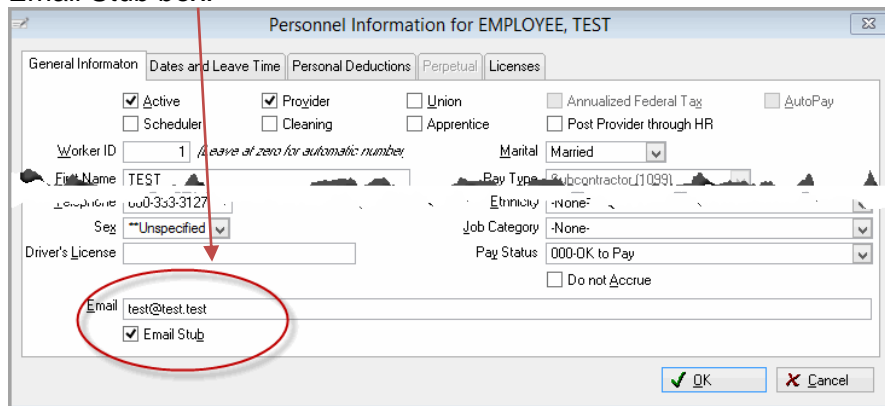
## Human Resources

### Worker Information

*File>Worker Information*

An email field has been added to the worker information screen.

HR Stubs and Provider Remittances can now be sent via email. This is especially useful for Direct Deposit recipients. To set this up, fill in the email address in the worker information and then check the Email Stub box.



The screenshot shows the 'Personnel Information for EMPLOYEE, TEST' window. The 'General Information' tab is active. The 'Email' field is circled in red, and the 'Email Stub' checkbox is checked. A red arrow points to the 'Email' field.

Figure Worker Information Screen

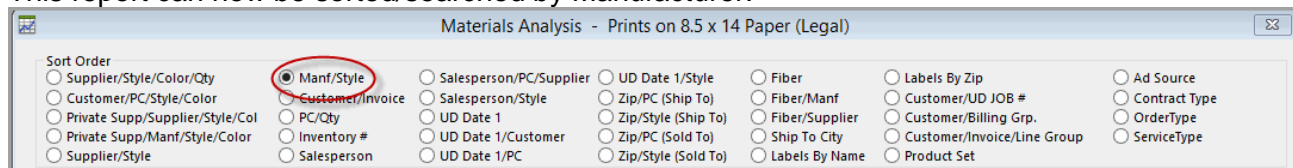
---

## Sales Reports

### Material Analysis

*File>Material Analysis*

This report can now be sorted/searched by Manufacturer.



The screenshot shows the 'Materials Analysis - Prints on 8.5 x 14 Paper (Legal)' window. The 'Sort Order' section is visible, and the 'Manf/Style' radio button is selected and circled in red.

Figure Material Analysis Sort Order List

The parameter window will now stay open and with the filters and selections made so that it can be run again without having to reselect options.

# Salesperson Management Report

*File>Sales>Salesperson Management Report*

The ability to send the report to a CSV output has been added.

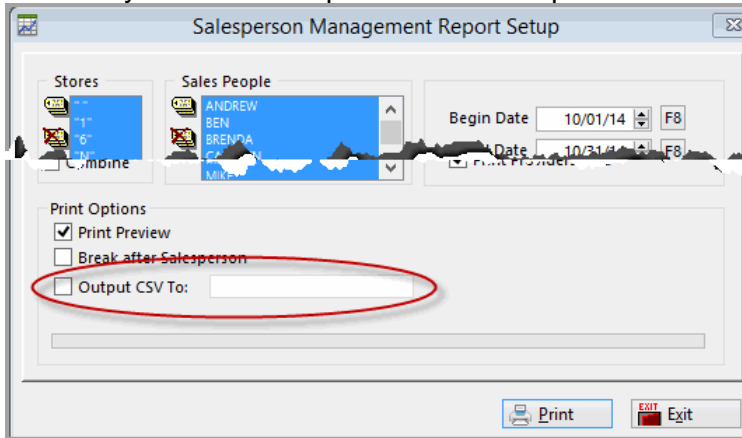


Figure Salesperson Management Report Print Screen

Sidemark has been added to the ordered and received report.

DOCUMENTATION						
Page No: 1		Salesperson Management Report				
09/11/14		MATERIAL ORDERED				
02:40PM		From 09/01/12 To 09/30/14				
PO Number	Customer	Style/Item	Color/Desc.	Order Date	Amt. Ord	Store
Sales Rep: ANDREW						
CG400961-0008	CUSTOMER, RETAIL	GLEN KERRY	CRIMSON	03/27/14	29.27	" "
Sidemark: CUSTOMER, RETAIL						
CG400958-0003	CUSTOMER, TEST	SUPPLIER STYLE	SUPPLIER COLOR	05/12/14	19.44	"1"
Sidemark: CUSTOMER, TEST						

Figure Salesperson Management Report Preview

# Client Management

## System Options

### **Allow User to Edit Customers in Client Management**

*x>Utilities>System Options>CMM>Customers*

*Category-Authorization*

**Type- Can be Global, Assigned or User**

This option allows specific users the ability to edit Customers in Client Management. Fields on the Additional Information tab are still disabled in Client Management.



Notes:

This is initially set to only be viewed/edited by an administrator.

### Automatically Move Sales Lead to Lost After # of Days

X>Utilities>System Options>Client Management>Sales Leads Category Configuration

Type- Must be Global 

This option can no longer be set to 0. Never marking old leads as lost was causing slow down issues when opening the Leads Browse List. The default setting is now 90 days.



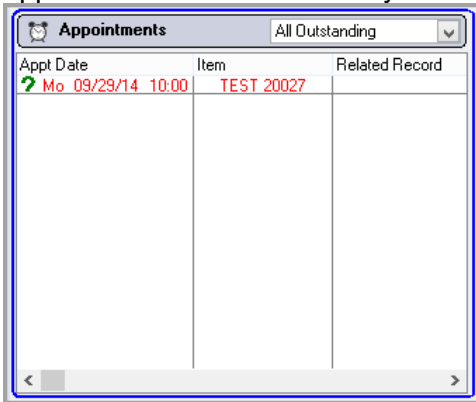
Notes:

A one-time warning will be given if this is set to zero.

---

## Workbench

On the Appointment browse, the time has been added to the Appointment Date column. The appointments will be sorted by date and then by time.



Appt Date	Item	Related Record
Mo 09/29/14 10:00	TEST 20027	

Figure Appointment Workbench

---

## Alerts Types

*Utilities > Client Management Set Up > Alert Types*

Alert types is now a user defined list to help with organization of Alerts.

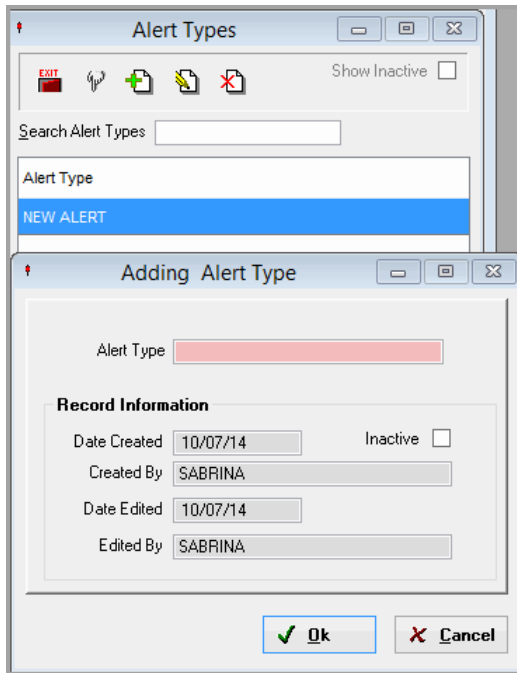


Figure CMM Alert Types

---

## Task Types

*Utilities > Client Management Set Up > Task Types*

Task types is now a user defined list to help with organization of Tasks.

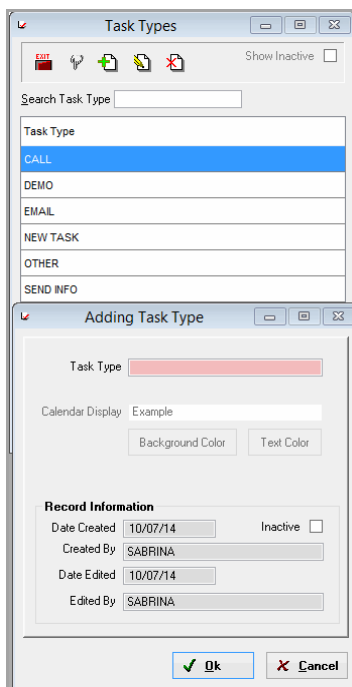


Figure CMM Task Types

# Prospects & Customers

## Edit Prospects/Customers Screen Changes

Changes have been made to make it more consistent with the Changing a Customer Record Screen in Order Entry. The following were changed.

### Added

- Customer #
- Customer Name Display Fields
- Export Name Fields

### Moved

- Store
- Customer Type
- Affiliation
- Relationship Info

## Exporting to Excel

When exporting to Excel, related contacts will export to a separate tab on the worksheet.

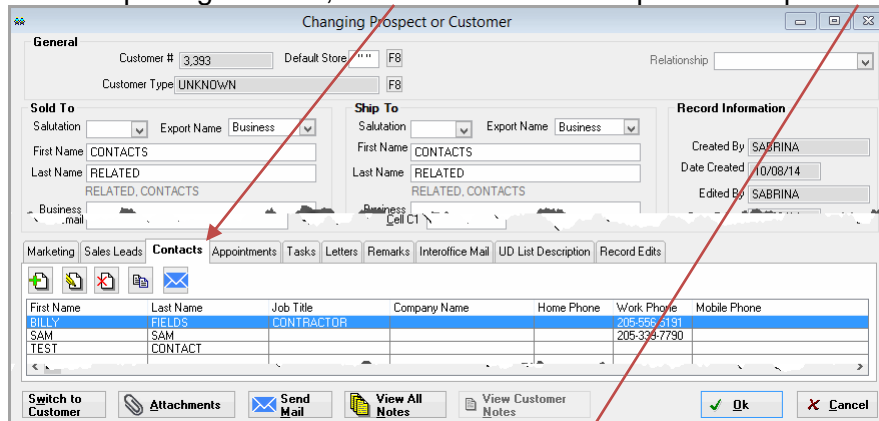


Figure CMM Related Contacts

	A	B	C	D	E	F	G	H	I	O
1	Related Customer ID	Related Customer Name	First Name	Last Name	Company Name	Job Title	Home Phone	Work Phone		Address Line 1
2	3393	RELATED, CONTACTS	BILLY	FIELDS		CONTRACTOR		205-556-5191 Ext		
3	3393	RELATED, CONTACTS	TEST	CONTACT				Ext		
4	3393	RELATED, CONTACTS	SAM	SAM				205-339-7790 Ext		.821 CHOCTAW
=										
37										
38										

Figure Customers & Prospects Excel Sheet

# Bid Pro

---

## Estimates

### Toolbar

The following icons have changed order and have new icons associated with them.

The icon to designate an Estimate to NOT be a template has been changed.



Export Template and Copy Estimate are now the same tool and therefore opened by one icon,

the copy icon.



Export to Order Entry icon has moved.



The icon to export to CSV has been changed.



The Purge Bids icon has been changed.



### Copying to a new Estimate or Template

You can now change the Customer and Project information when copying to a new Estimate or template.

## Tax Status

A drop down menu has been added to the Estimate screen. This drop down menu includes Taxable, Exempt and Resale.

The screenshot shows the 'Job Estimate' window. At the top, there are fields for Estimate # (JE100184), Estimate Date (03/11/13), Store ('1'), and Measure Date. Below this is a 'Customer' section with fields for Sales Per 1 (ANDREW), Sales Per 2, Cust Type (CASH & CARRY), and Job Phone. The 'Tax Status' dropdown menu is highlighted with a red circle and shows three options: 'Taxable', 'Exempt', and 'Resale'. Below the dropdown is a table with columns: Line Number, Area, Style, Color, and Units. The table contains two rows of data.

Line Number	Area	Style	Color	Units
1	CARPET #2	PRIVATE STYLE	PRIVATE COLOR	SF
2	CARPET #2	PAD 7/16	BASIC	SF

Figure Estimate Screen



### Notes:

- The following choices have been added for Canada
- GST Exempt
  - PST Exempt
  - All Exempt

## Copy Utilities

The ability to copy Notes, Attachments and Print Groups has been added to the Copy and Move Utilities Screen.

The screenshot shows the 'Copy and Move Utilities' window. It has a 'Copy Options' section with three radio buttons: 'TO NEW: Copy Estimate/Template and New Estimate/Template', 'TO NEW SUB: Copy Estimate/Template into New Sub Estimate/Template', and 'TO EXISTING: Copy Selected Lines to Template'. Below this are checkboxes for 'Copy Estimate Internal Notes', 'Copy Estimate Attachments', 'Copy Estimate Custom Notes', 'Copy Line Attachments', 'Copy Line Notes', and 'Copy Print Groups'. The 'Copy Line Notes' and 'Copy Print Groups' checkboxes are circled in red. At the bottom, there are fields for 'Change Sold To Customer' and 'Change Project Information', and 'Copy' and 'Exit' buttons.

Figure Copy and Move Utilities Screen

### Added Fields to Estimate

Three Fields (Measure Date, PO Number and Customer Email) have been added to the Estimate Screen. They will be exported to Order Entry.

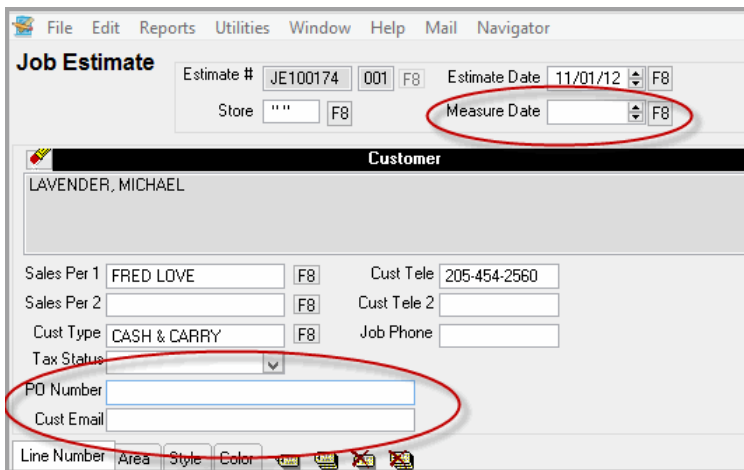


Figure Estimate Screen

The Total Screen now shows a breakdown of costs and gross profit. Click the magnifying glass

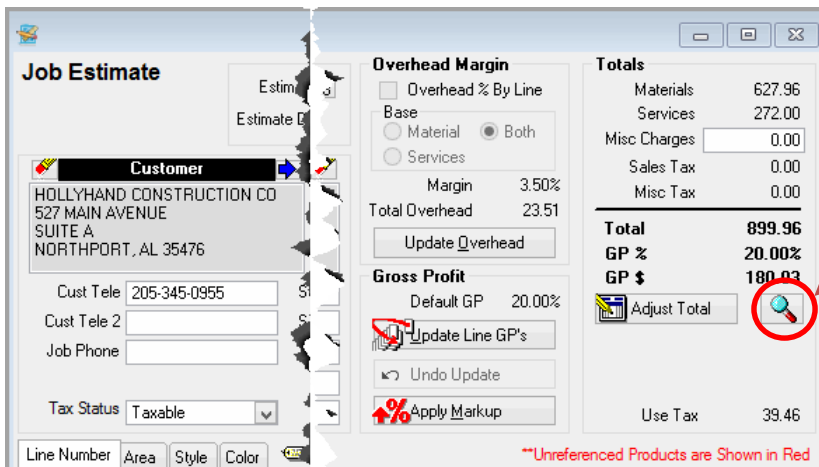


Figure Estimate Screen

**Estimate Totals**

Estimate Number JE100220 001

<b>Tax Basis</b>		<b>Sales Totals</b>		<b>Costs</b>	
Estimate Tax Status	Taxable	Material	618.00	Material Cost	385.00
Tax Method	Sales Tax	Services	0.50	Service Cost	35.00
Sales Tax Base	Material	Misc Charges	0.00	Overhead Cost	15.00
Sales Tax Percent	10.00%	<b>Net Sale</b>	<b>618.50</b>	Freight Cost	110.00
Misc Tax Base	Material + Labor + MiscCharges	Sales Tax	61.80	Load Cost	0.00
Misc Tax Percent	0.00%	Misc Tax	0.00	<b>Total Costs</b>	<b>606.80</b>
<b>Total</b>	<b>680.30</b>	<b>Total</b>	<b>680.30</b>	<b>Gross Profit \$</b>	<b>73.50</b>
<b>Gross Profit %</b>	<b>11.88%</b>			<b>Gross Profit %</b>	<b>11.88%</b>

**Overhead Margin Basis**  
Base: Overhead Margin Base = Material Lines Only  
Overhead Margin %: 3.75%

Figure Estimate Totals

## Copy Utilities



Edit>Copy Utilities or

This screen will do both copying and moving of lines. It can be done from or to Estimates, Sub Estimates and Templates. The user has the ability to copy notes, attachments and print groups or to move lines.

**Copy and Move Utilities**

Select Estimate/Template to Copy From

Estimate JE100219 001 F8 Estimate Date 10/15/14

<b>Customer</b>	<b>Project</b>
CUSTOMER LAST, CUSTOMER FIRST TEST ADDRESS 1 SOLD TEST ADDRESS 2 SOLD TEST, AL 35452 000-000-0111	TEST ADDRESS 1 SOLD TEST ADDRESS 2 SOLD TEST, AL 35452

Model LONG COLOR/DESCRIP Total 603.24  
Salesperson 1 BEN GP % 9.91%

**Copy Options**

Copy To

TO NEW: Copy Estimate/Template and Selected Lines into New Estimate/Template  
 TO NEW SUB: Copy Estimate/Template and Selected Lines into New Sub Estimate/Template  
 TO EXISTING: Copy Selected Lines to Existing Estimate/Template

Move Lines (Deletes Original Lines after Copying)  
 Copy Estimate Internal Notes  
 Copy Estimate Attachments  
 Copy Estimate Custom Notes  
 Copy Line Attachments  
 Copy Line Notes  
 Copy Print Groups

Select Lines To Copy

Area	PC	Style	Color	Item Number	Width	Length	Actual Values Qty	Total	GP
BASEMENT	01	PRIVATE STYLE	PRIVATE COLOR111111111111		12.00	10.00	120.00	548.40	9.91

Select Destination Estimate/Template

Estimate JE-EST# 001 F8  
 Create as Template

Change Sold To Customer F8  
Change Project Information F8

Copy Exit

Figure Copy Utilities Screen

# Estimate Report Writer

*Edit>Print Estimate* or 

The Estimate Report has become more flexible. Options have been moved around and many fields have been added. The pictures below compare the old screen and the new screen.

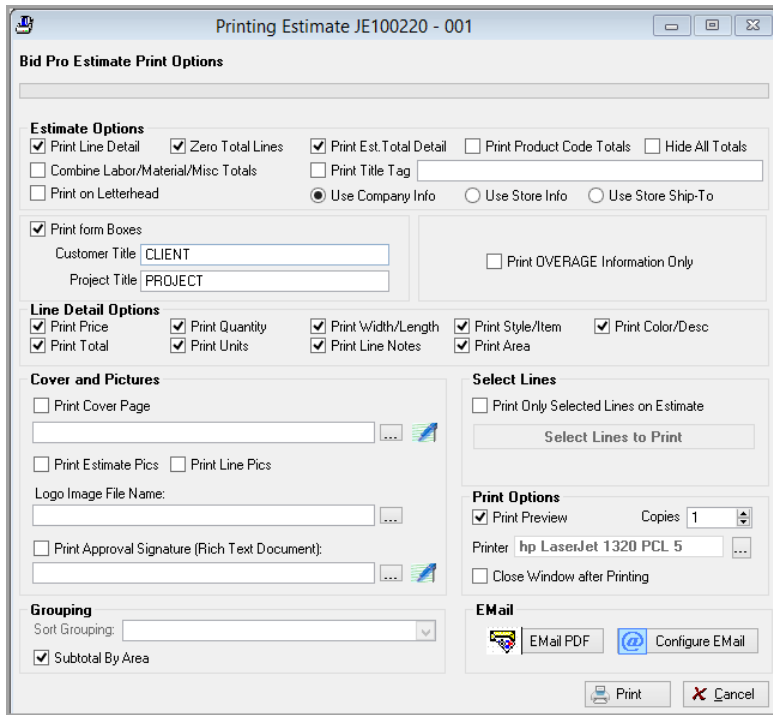


Figure BidPro Old Print Screen

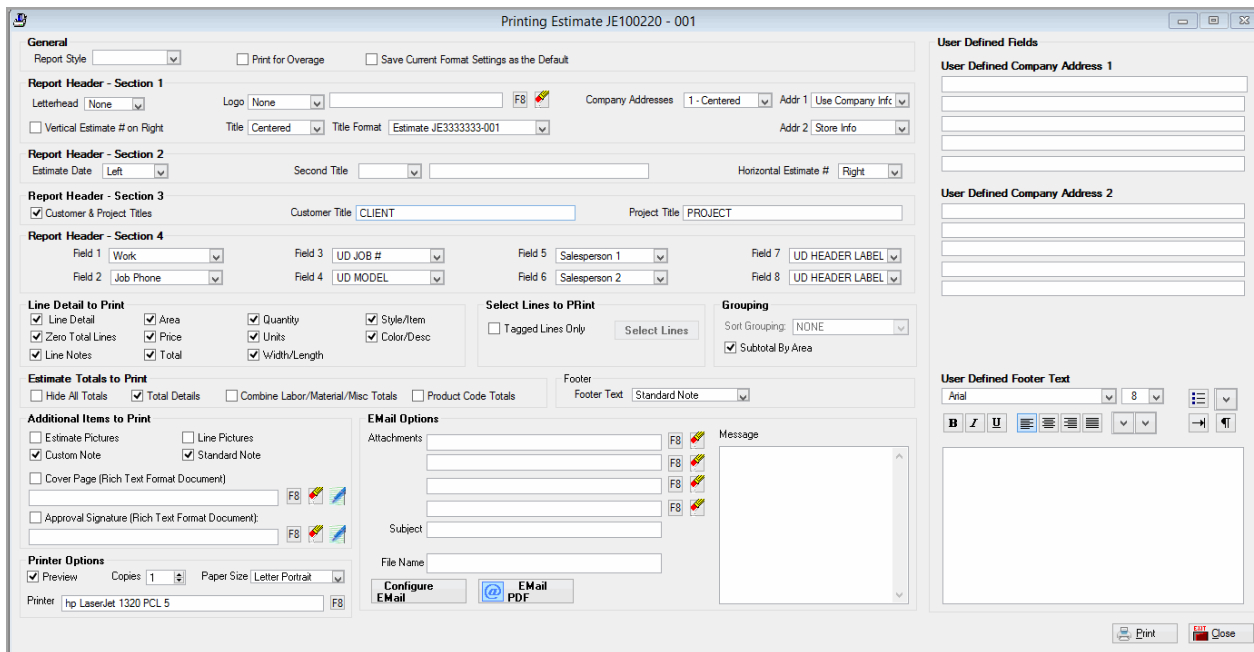


Figure BidPro New Print Screen

New features and fields are

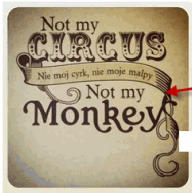
- Report Style-This gives you the choice of None, Blue Boxes, Black Boxes and Underline. This is the overall report.
- Save Current Format Settings as the Default-This checkbox will save the current set up to be used when reopening the screen. This is per user.
- Letterhead-This gives you the choice to print on None, 1 inch, 1.25 inch, 1.5 inch or 2 inch. When printing on letterhead the Logo, Title, Company Addresses and Vertical Estimate Number will not print.



Notes:

This is in addition to the standard .5 inch margin. For example, the 2 inch gives room for 2 inches of preprinted letterhead starting at .5 inch from the top of the page

- Vertical Estimate # on Right-Check this box if you want the Vertical Estimate # to print.
- Logo-None, Left, Centered and Right
- Title-None, Left, Centered and Right
- Format-This can be set to print Estimate Number, Date or Both
- Company Addresses-Addresses can be form The Company Information, Store Information, Store Ship To or User Defined for zero, one or two addresses. If using the User Defined fields, the address needs to be entered on the User Defined Fields section on the Print Screen.
- Estimate Date-None, Left, Centered and Right
- Second Title-None, Left, Centered and Right. The text for the title should be typed in.
- Horizontal Estimate Number-None, Left, Centered and Right
- Report Header-Users can select up to 8 fields to print on the report.
- Footer Text-Text at the bottom of the report can be set to None, Standard Message, Custom Message or User Defined. If User Defined is selected, the desired Footer text should be entered in the User Defined Fields section on the Print Screen.
- Custom Note-Prints in the body of the report
- Standard Note-Prints in the body of the report
- Paper Size-Letter Portrait and A4 Portrait



ESTIMATE JE100220-001 10/21/14

**Test Company**  
123 Main Street  
Main, USA 12345  
Phone  
Email

**Test Company 2**  
123 Not Main Street  
Main, USA 12345  
Phone  
Email

JE100220-001

JE100220-001

ESTIMATE Date 10/21/14

User Defined-Customer Title	User Defined-Project Title
CUSTOMER LAST, CUSTOMER FIRST TEST ADDRESS 1 SOLD TEST ADDRESS 2 SOLD TEST, AL 35452	TEST ADDRESS 1 SOLD TEST ADDRESS 2 SOLD TEST, AL 35452

Work	UD JOB #	ESTIMATE Number	UD HEADER LABEL 1
000-000-0111		JE100220-001	
Job Phone	UD MODEL	Salesperson 2	UD HEADER LABEL 2

BILL

Area	Style/Item	Color/Desc	UOM	Len	Width	Qty	Price	Total
BATH 1	CPT-(BASIC)-FREE INSTALLATION ON DEC 2012 PURCHASE		SF			1.00	0.50	0.50
Line note 1	Line Detail to Print Line Notes							
BATH 1	PROM QUEEN II UNITARY - INV - 12'	BALLERINA	SF	10.00	12.00	120.00	5.15	618.00
Line note 2	Line Detail to Print Line Notes							
<b>BATH 1 Sub Total:</b>								<b>618.50</b>

This is a Custom Note

This is a standard note

This is the user defined footer text.

JE100220-001	
Material	618.00
Inst Service	0.50
Misc Charges	0.00
Sales Tax	61.80
Misc Tax	0.00
<b>Total</b>	<b>680.30</b>

10/21/2014

Page No: 1

Figure Bid Pro Preview Estimate Print Screen

## Email Estimate Report

*Edit>Print Estimate* or 

The email address will default to the email address in the Customer File when emailing the report.

## Email Multiple Attachments with Estimate Report

*Edit>Print Estimate* or 

The ability to attach 4 additional documents when emailing an estimate has been added.

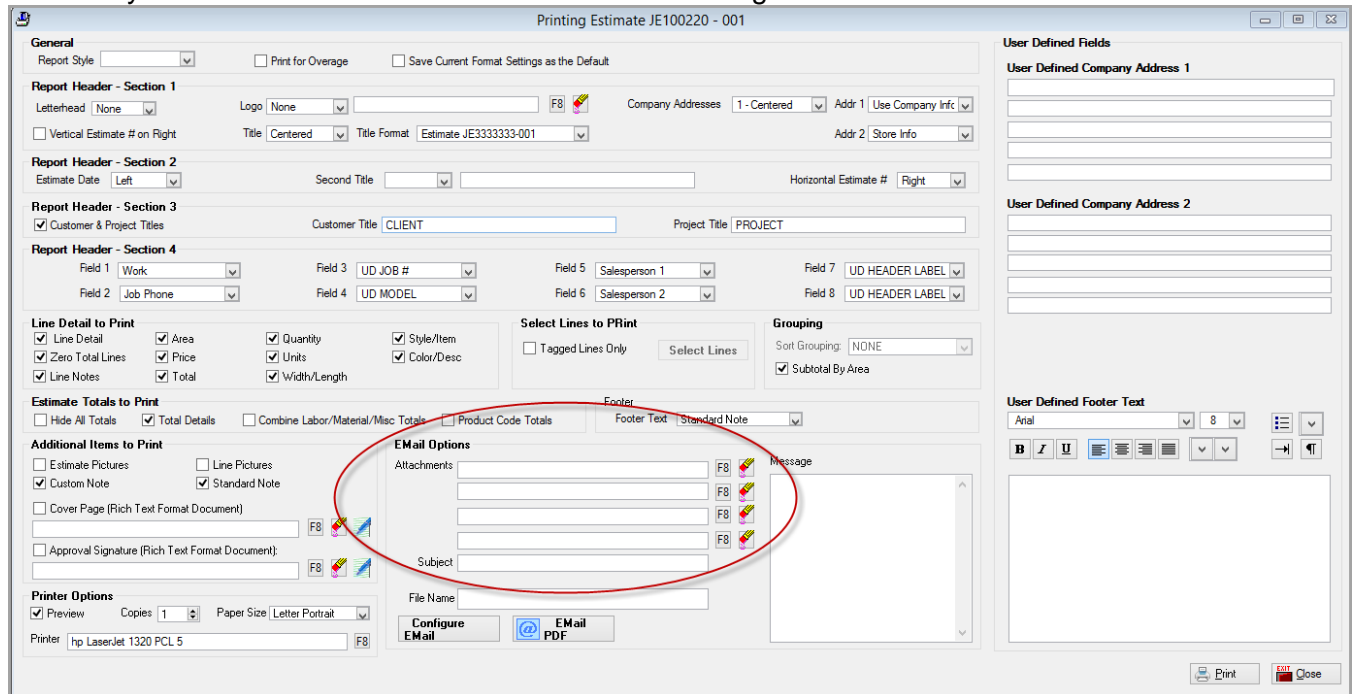


Figure Printing Estimate Screen

## RFMS Link

### Price Levels

Price Levels now use the name assigned in RFMS. They no longer will use Price 1, Price 2, etc.