



Systems for Success

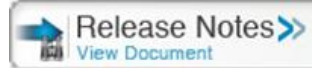
A large decorative graphic on the right side of the page, consisting of three overlapping, wavy bands. The top band is light gray, the middle band is dark red, and the bottom band is black. The bands curve upwards from left to right.

Version 16.0  
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.







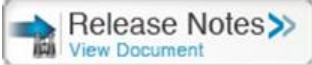
To see what you may have missed in previous updates click here.














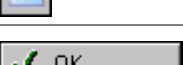
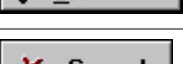








[For directions on loading updates to the RFMS software, click here.](#)








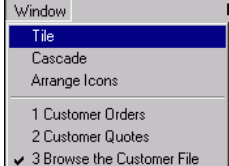



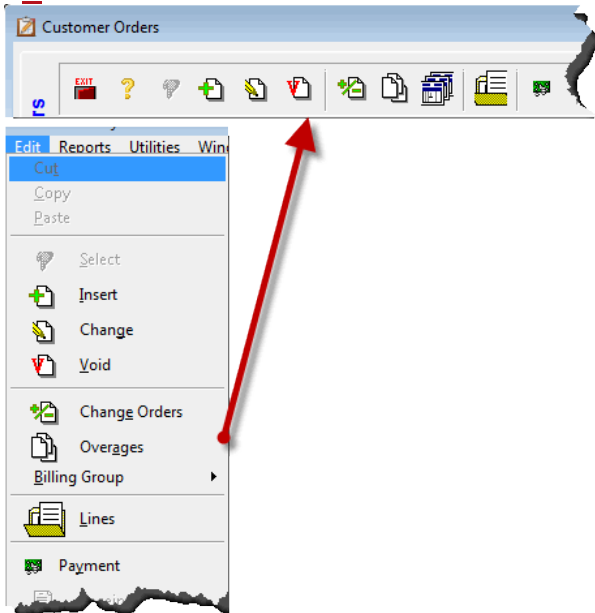
The same documentation is included in the on-line help system and can be accessed by pressing the F1 button at any RFMS screen. If there is something on the screen that you either don't recognize or understand, check this document or refer to the Help Files pressing F1.

## 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.
 or 	View the <b>pdf history</b> of reports for the highlighted record.
 or 	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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# Payroll Update

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This version includes the Payroll Update for 2016.

This includes any Federal Tax changes for US and Canada.

The following areas had tax table changes.

## **United States**

California	North Carolina
Connecticut	North Dakota
District of Columbia	New Mexico
Illinois	New York City, NY
Indiana	New York State
Kentucky	Yonkers, NY
Massachusetts	Oklahoma
Maryland	Oregon
Maine	Rhode Island
Minnesota	Vermont
Missouri	

## **Canada**

Alberta  
British Columbia  
Manitoba  
New Brunswick  
Newfoundland and Labrador  
Northwest Territories  
Nova Scotia  
Nunavut  
Ontario  
Prince Edward Island  
Saskatchewan  
Yukon

For End of the Year documents, click [here](#).

# System Options

## System Wide

### RFMS Create Products: Active on Insert (added 15.1.4)

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

Type- Can be Global, Assigned or User

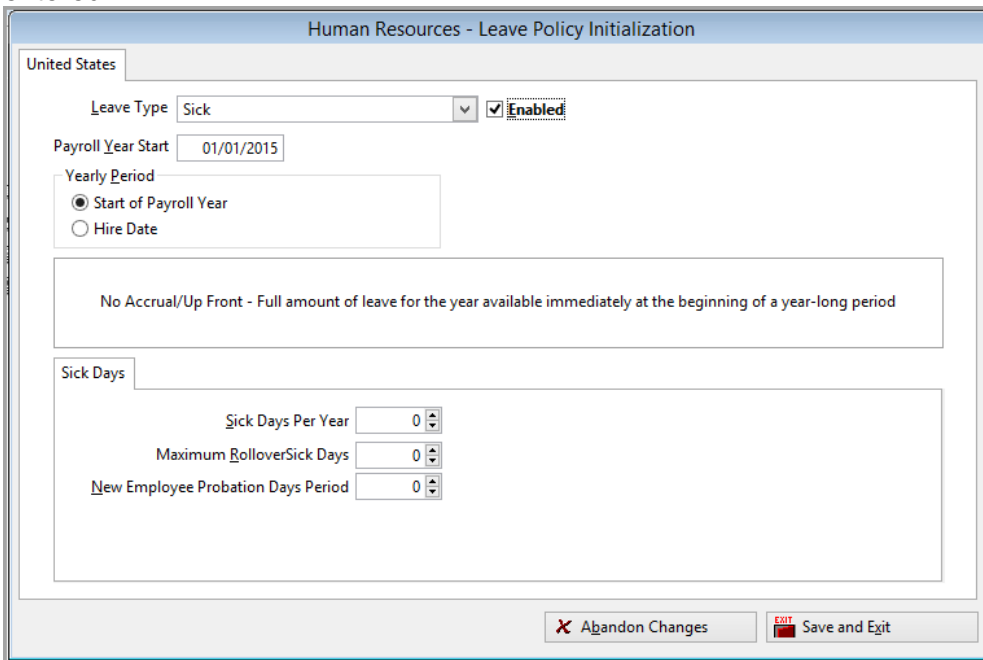
This option allows users to set newly RFMS created products to Inactive by selecting no. This will not affect product records already added.

### Set Leave Specifications (Sick, Vacation, Holiday, Other)

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

Type- Must be Global 

This option allows sick, vacation, holiday and other that an employee receives for the year to be entered.



Human Resources - Leave Policy Initialization

United States

Leave Type: Sick  Enabled

Payroll Year Start: 01/01/2015

Yearly Period:

- Start of Payroll Year
- Hire Date

No Accrual/Up Front - Full amount of leave for the year available immediately at the beginning of a year-long period

Sick Days:

Sick Days Per Year: 0

Maximum Rollover Sick Days: 0

New Employee Probation Days Period: 0

Abandon Changes Save and Exit

Figure Leave Policy Initialization Screen

The enable box must be checked for each option in the Leave Type Dropdown menu.

Human Resources - Leave Policy Initialization

United States

Leave Type Sick  Enabled

Payroll Year Start Sick

Yearly Period Vacation

Start of Payroll Year

Hire Date

No Accrual/Up Front - Full amount of leave for the year available immediately at the beginning of a year-long period

Sick Days

Sick Days Per Year 0

Maximum Rollover Sick Days 0

New Employee Probation Days Period 0

Abandon Changes Save and Exit

Figure Leave Policy Initialization Screen

If an option is not enabled, then the areas below will be grayed out.

Human Resources - Leave Policy Initialization

United States

Leave Type Sick  Enabled

Payroll Year Start 01/01/2015

Yearly Period

Start of Payroll Year

Hire Date

No Accrual/Up Front - Full amount of leave for the year available immediately at the beginning of a year-long period

Sick Days

Sick Days Per Year 0

Maximum Rollover Sick Days 0

New Employee Probation Days Period 0

Abandon Changes Save and Exit

Figure Leave Policy Initialization Screen



Notes:

- The Yearly Period can either be Start of Payroll Year or Hire Date.
- At this time, RFMS is not able to do Accrual based on amount of time worked. This must be done manually. Accrual will be available in future versions.

# Inventory

## RFMS Created Product Records

The RFMS Created Product records will be created at the time of receiving. (Version 15.1.1)

The Item Number is no longer part of the criteria that is looked at when creating an RFMS product. (Version 15.1.2)

# Accounting

## Human Resources

*File>Human Resources*

### Worker Information

*File>Human Resources>File>Worker Information*

A field called Employee Type has been added to the Worker Information screen. The choices in the dropdown menu are Full Time, Part Time and Casual. The default setting is Full Time.

Figure Worker Information Screen



Notes:

This field will only show for employees not subcontractors.

### ACA Health Coverage (Form 1095-C)

While RFMS does not track the information necessary to complete the details of these reports, the header information can be printed on these documents. This report prints the actual government form. There is no need to download it from the government web site.

*File>Human Resources>Reports>End of Year>ACA Health Coverage (Form 1095-C)*

The first time the screen opens, the employer information will be blank. Fill in ALL the appropriate information.



Next, click Process. Choose the correct Tax Year.

1095-C Employer Provided Health Insurance Offer and Coverage

Tax Year: 2015

Applicable Large Employer Member (Employer)

Employer: DOCUMENTATION EIN: 123456788  
 Street Address: 123 TEST ST. Contact Phone: (205)111-1111  
 City: TUSCALOOSA State: AL Zip: 35405

by Name by SS Number

Search by Last Name

Name	SS Number	Address	City	State	Zip
ALLEN, JASON				WI	12345
APLIN, GORDON				AL	35453
BOOTH, JAMES				AL	35452
EMPLOYEE, CT					
EMPLOYEE, HOURLY				AL	35473

Parameters: 1095-C Employer Provided Health Insurance Offer and Coverage

Tax Year: 2015 Select Tax Year

OK Cancel

Figure Process screen

Click Ok once the appropriate information has been checked. The following question will appear. If you are ready to update the report, click Yes.

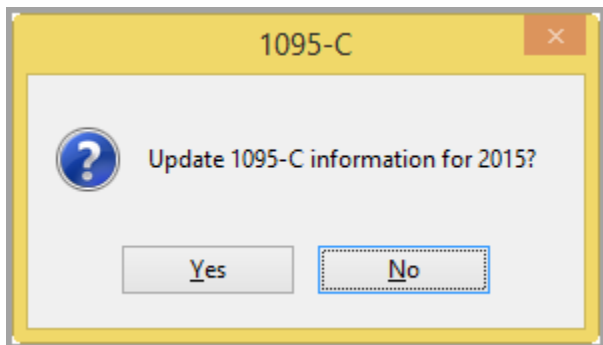



Figure Update Screen

The Employees' information will be generated. These employees are those who had w-2 earnings in the indicated year.

Click the Print  when all of the editing is done. You can preview, print only, or cancel. Both pages will print.

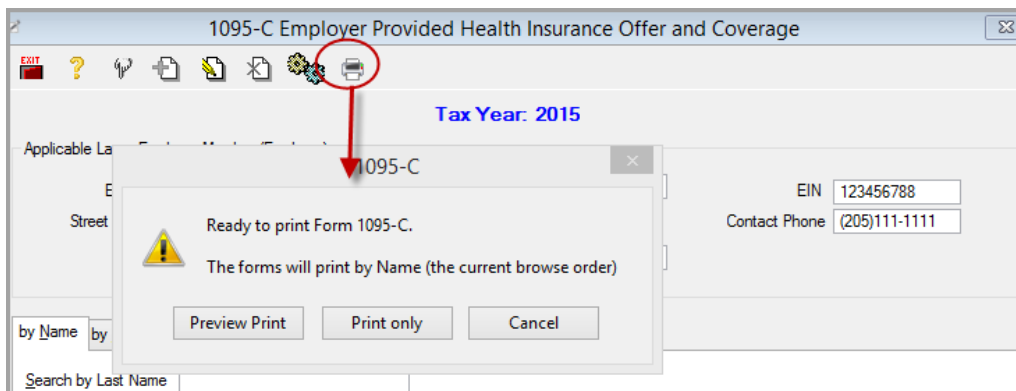


Figure Print Screen



Notes:

The forms will not print if all the employer information is not filled in at the top.

To print the form on back and front, the file must be saved to a PDF from the Preview Screen. The form can then be printed from the PDF.

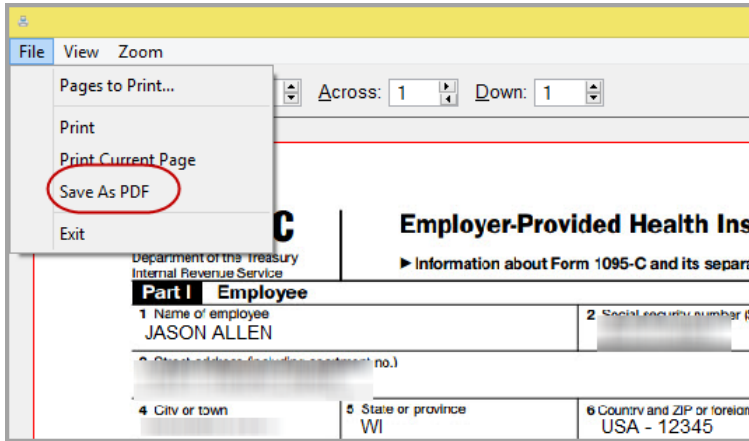


Figure Save as PDF on Preview Screen

# Sales Reports

## Demographics Report

*File>Marketing>Demographics Report*

The state column has been added to the csv.

A	B	C	D	E	F	G	H	I	J	K	L	M
Store	Zip	Num of Sa	MatOnly	SalesTax	OtherChai	InvTotal	Customer	% of Cust	% of Store	% of Sales	City	State
" "	* Unknow	5775	516812	45215.2	10834.77	580082	ARCHT/SP	28.084	1.431	1.427		
" "	35476	2029	340103.8	29607.09	19391.27	389748.1	ARCHT/SP	18.869	0.961	0.959	CASH & C/AL	
" "	35406	274	140387.3	11575.05	6979.19	160207.5	ARCHT/SP	7.756	0.395	0.394	TUSCALOCAL	
" "	35405	271	193979.7	9707.09	11118.92	209492.4	ARCHT/SP	10.142	0.517	0.515		

# Import/Export (Products)

## CSV File

The following columns (fields) have been added to Product Import and Export: Private Collection, Price Code Trans Date, Species (Items Only) Country of Origin (Items Only), Construction (Item Only), Notes.

BT	BU	BV	BW	BX	BY	BZ
Private Collection	PriceCode	Trans Date	Species (Items only)	Country of Origin (Items only)	Construction (Items only)	Notes
		20150427				
		00151000				

# FloorMetrics Connect

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## What is the FloorMetrics Business Intelligence Service?

FloorMetrics is an online service that gives the Flooring Industry access to real-time business intelligence to assist in increasing sales, reducing costs and optimizing business performance by providing actionable insight to your flooring business.

For more information on this Add On Program, click [here](#).