



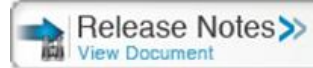
Systems for Success

# Version 17.1-17.1.4 Update Document

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3073 Palisades Court  
Tuscaloosa, AL 35405

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 web

page. Click the release notes button to find these.







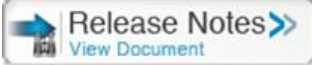
To see what you may have missed in previous updates click here.














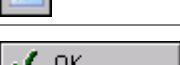
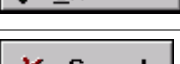








[For directions on loading updates to the RFMS software, click here.](#)








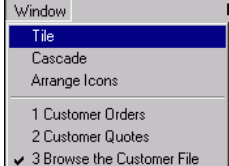



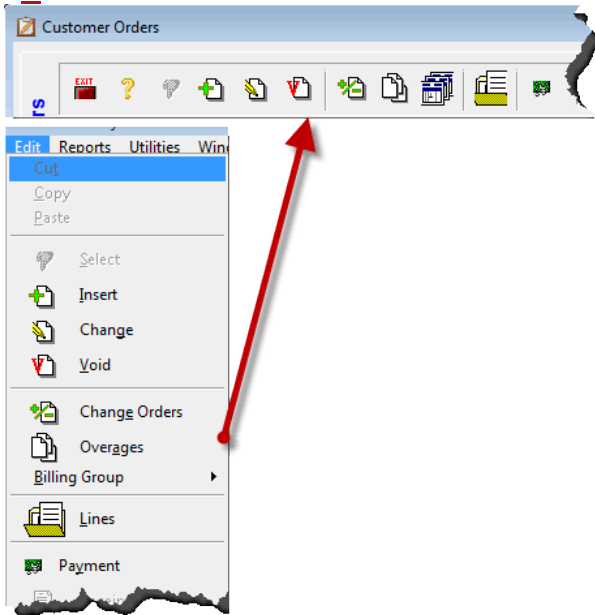
The same documentation is included in the online help system and can be accessed by pressing the F1 button at any RFMS screen. If there is something on the screen that you either don't recognize or understand, check this document or refer to the Help Files pressing F1.

## 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 web page. 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 the list.
	<b>Print</b> a document or go to a report menu.
	Allows adding, changing or deleting the 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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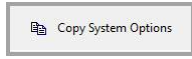
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# System Wide

## System Options

### Copy System Options



A new option has been added to choose whether or not to copy the Screen & Browse settings (Screen size, column widths, etc.)

A new option has been added to choose whether or not to copy the Saved filters.

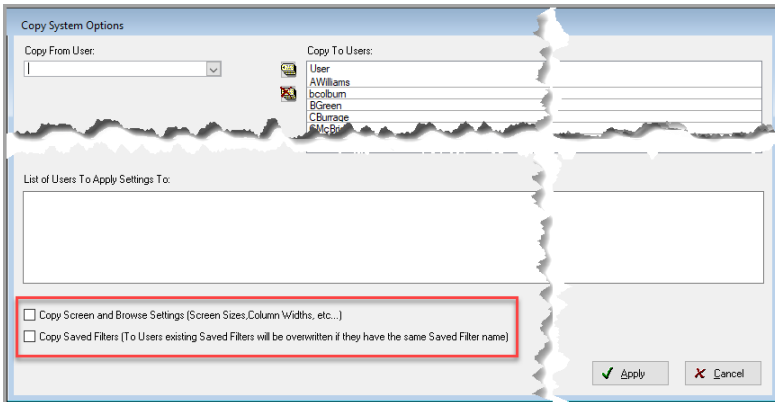


Figure Copy System Options screen

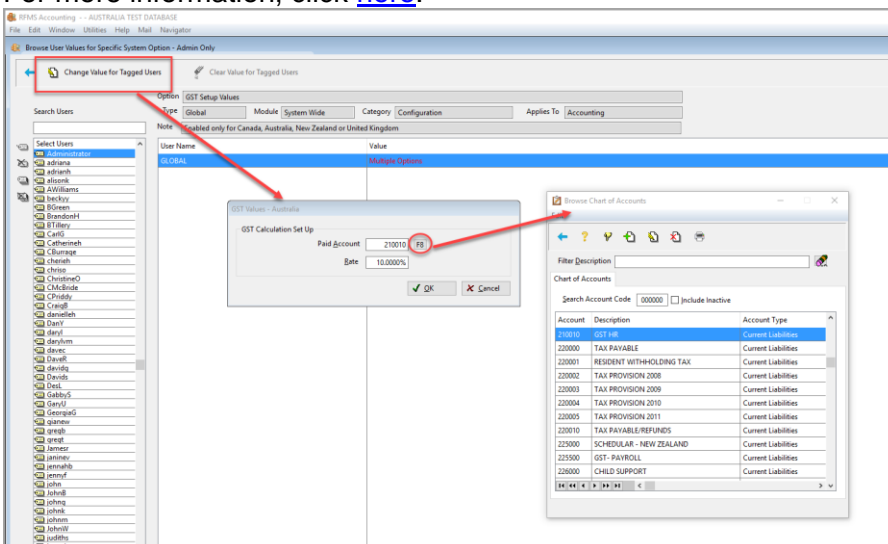
### GST Setup Values

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

### Type- Must be Global

This system option has been added to allow for the GST Calculation setup. The Paid Account (pulled from the Chart of Accounts) and the Rate are set up here.

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



# Order Entry

## System Options

### Allow User to Edit Special Cost When Adding a Line

>Utilities>System Options>Order Entry>Order Entry

Category-Configuration

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

If this option is set to Yes, then a Special PO Info box will appear on the right lower side of the Order Line screen when the roll/item is pulled from Products. This is also available in Quotes.

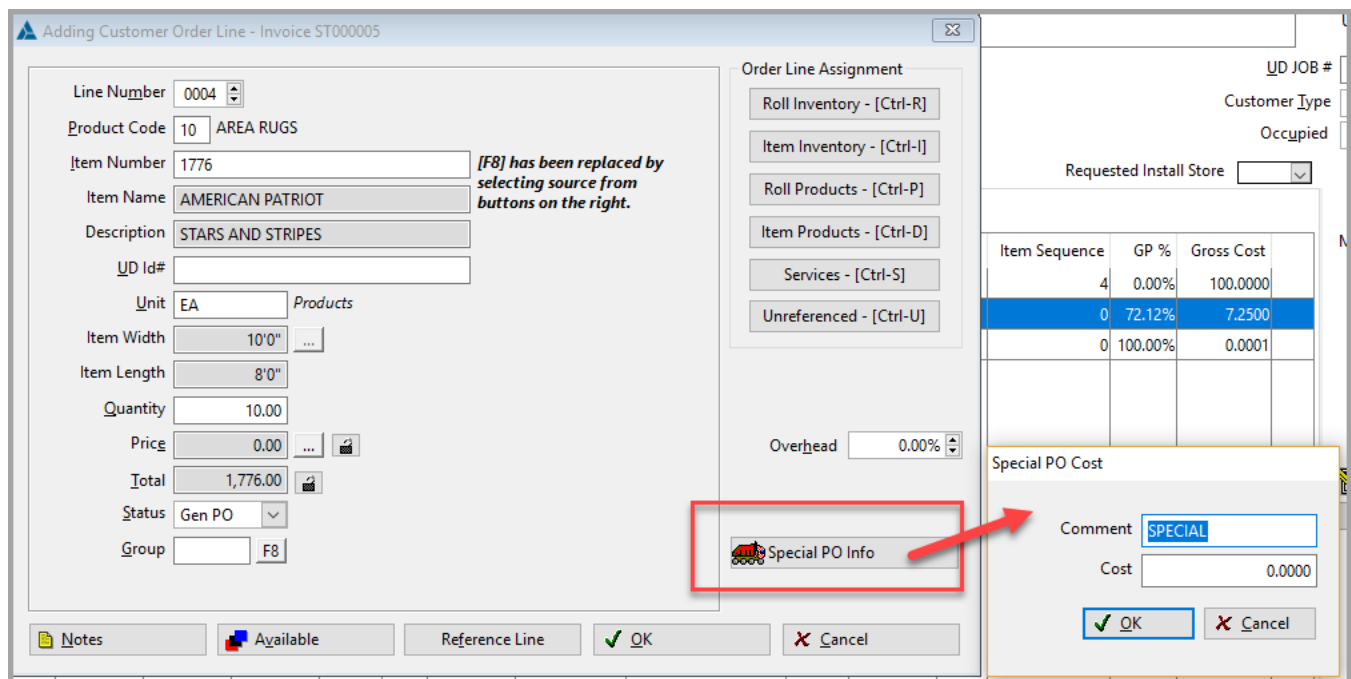


Figure Special PO Info

# Display Roll Supplier

>Utilities>System Options>Order Entry>Products

Category-Display

Type- Can be Global, Assigned or User

If this option is set to No, the supplier information will be dashed out on the Product Select screen in Order Entry.

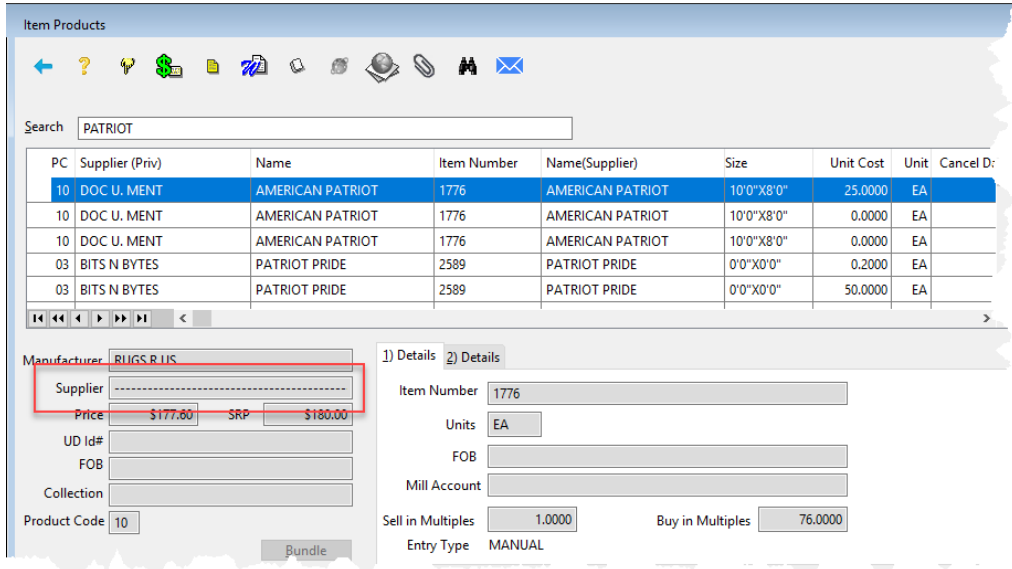


Figure Item Products Select screen from Order Entry

The Supplier will not show on the Find screen for the Product Select screen in Order Entry if this system option is set to No.

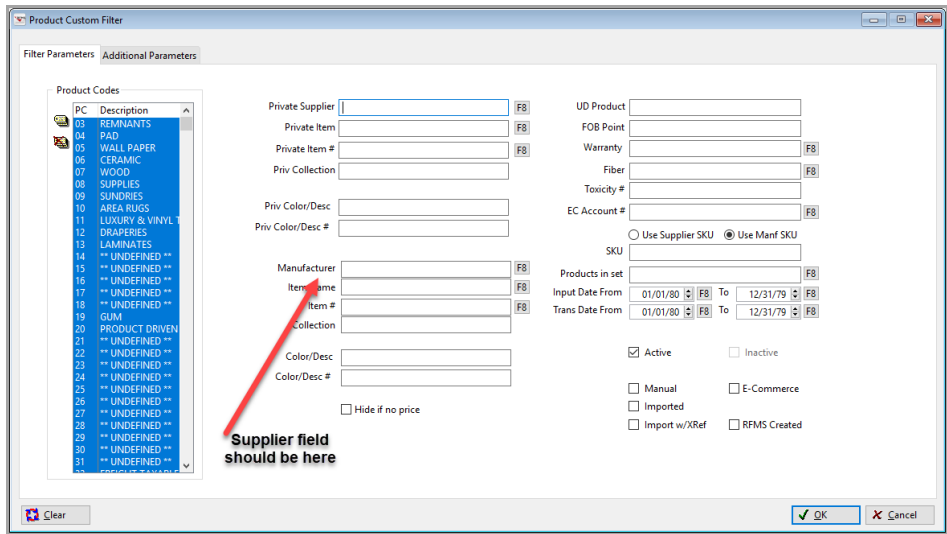


Figure Item Find Screen in Order Entry

# Customer Orders



## Find Screen

The ability to filter by On Hold orders, Date Entered, Job Cost Trans. Date, and Balance From/To has been added to the Find screen. These are useful when printed merged by batch.

The screenshot shows the 'Find Orders' interface with various search criteria. The 'On Hold' checkbox is checked and highlighted with a red box. The 'Date Entered' range is also highlighted with a red box.

Field	From	To
Date Entered	01/01/80	12/31/79
Job Cost Trans. Date	01/01/80	12/31/79
Balance From	0.00	0.00

Figure Customer Order Find screen

## Roll/Item Inventory

The ability to view the Purchase Order from the Roll/Item Inventory screens while in Order Entry has been added.

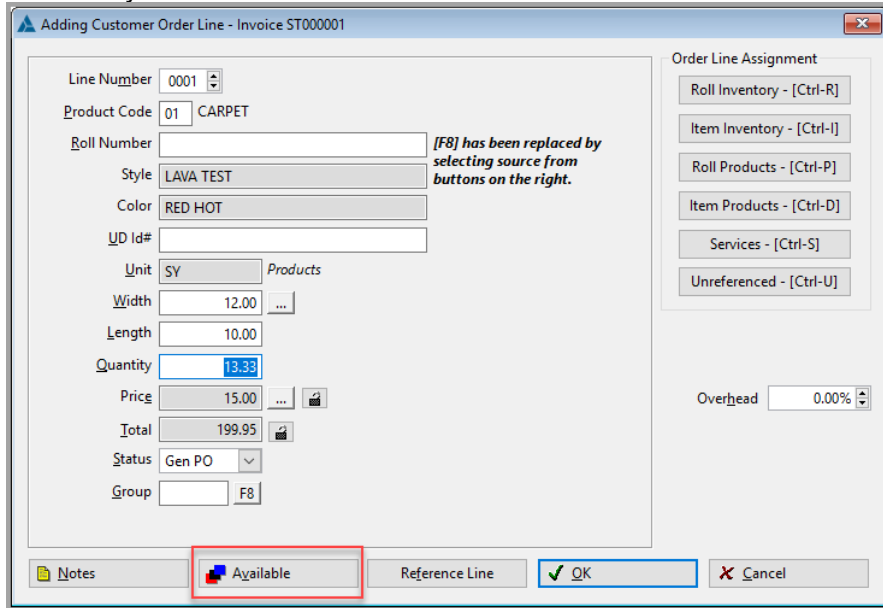
The screenshot shows the 'Roll Inventory' screen with a search bar containing 'BLACK AS' and a table of inventory items.

Store	PC	Roll Number	Style	Color	Dye Lot	Width	Used	Reserved	Soft Res
"N"	01	CG6027390001	ALOHA SANDS	BLACK BEACH		12.00	ON ORDER	100.00	C
" "	01	75851263	AMBASSADOR - 12'	SMOKEY TOPAZ	P20369	12.00	43.00	0.00	0.0
" "	01	CG131	BLACK AS NIGHT	GASTON		12.00	0.00	15.00	u..
"#"	01	CG710770002	BLACK AS NIGHT	HUNTERMAN		12.00	50.00	0.00	

Figure Roll Inventory Browse screen

## Customer Order Line

The ability to use the Available button  has been added for Rolls.



Adding Customer Order Line - Invoice ST000001

Line Number: 0001  
 Product Code: 01 CARPET  
 Roll Number: [Empty] *[F8] has been replaced by selecting source from buttons on the right.*  
 Style: LAVA TEST  
 Color: RED HOT  
 UD Id#: [Empty]  
 Unit: SY Products  
 Width: 12.00  
 Length: 10.00  
 Quantity: 13.33  
 Price: 15.00  
 Total: 199.95  
 Status: Gen PO  
 Group: F8

Order Line Assignment  
 Roll Inventory - [Ctrl-R]  
 Item Inventory - [Ctrl-I]  
 Roll Products - [Ctrl-P]  
 Item Products - [Ctrl-D]  
 Services - [Ctrl-S]  
 Unreferenced - [Ctrl-U]

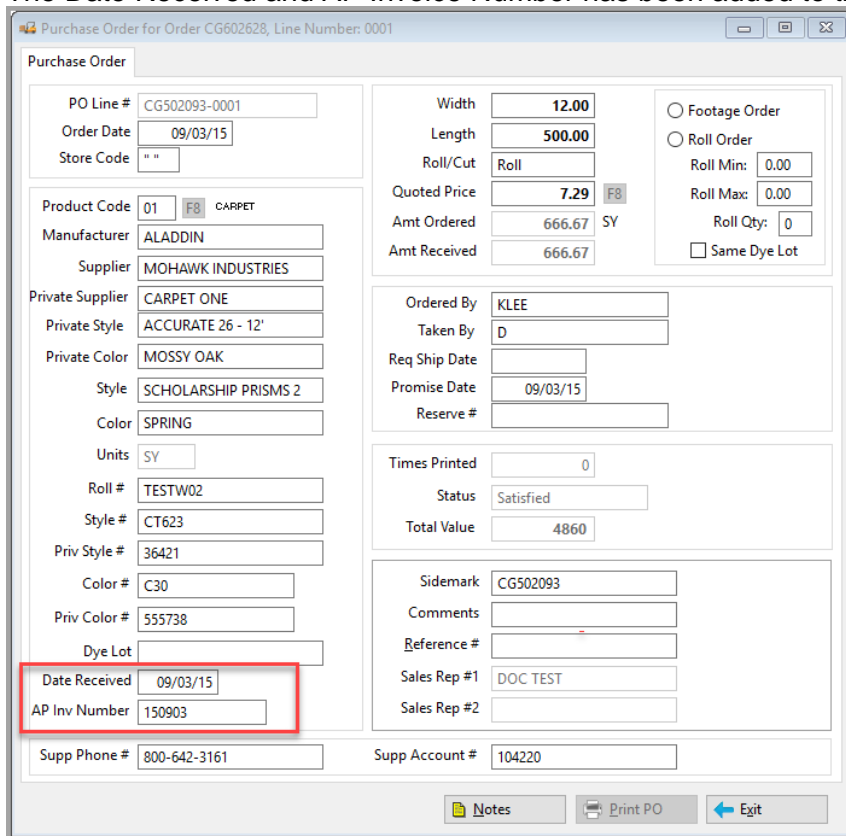
Overhead: 0.00%

Buttons: Notes, Available, Reference Line, OK, Cancel

Figure Customer Line screen

## View PO

The Date Received and AP Invoice Number has been added to the View Purchase Order screen.



Purchase Order for Order CG602628, Line Number: 0001

Purchase Order  
 PO Line #: CG502093-0001  
 Order Date: 09/03/15  
 Store Code: ""

Product Code: 01 F8 CARPET  
 Manufacturer: ALADDIN  
 Supplier: MOHAWK INDUSTRIES  
 Private Supplier: CARPET ONE  
 Private Style: ACCURATE 26 - 12'  
 Private Color: MOSSY OAK  
 Style: SCHOLARSHIP PRISMS 2  
 Color: SPRING  
 Units: SY  
 Roll #: TESTW02  
 Style #: CT623  
 Priv Style #: 36421  
 Color #: C30  
 Priv Color #: 555738  
 Dye Lot: [Empty]

Width: 12.00  
 Length: 500.00  
 Roll/Cut: Roll  
 Quoted Price: 7.29 F8  
 Amt Ordered: 666.67 SY  
 Amt Received: 666.67

Ordered By: KLEE  
 Taken By: D  
 Req Ship Date: [Empty]  
 Promise Date: 09/03/15  
 Reserve #: [Empty]

Times Printed: 0  
 Status: Satisfied  
 Total Value: 4860

Footage Order  
 Roll Order  
 Roll Min: 0.00  
 Roll Max: 0.00  
 Roll Qty: 0  
 Same Dye Lot: [Unchecked]

Date Received: 09/03/15  
 AP Inv Number: 150903

Sidemark: CG502093  
 Comments: [Empty]  
 Reference #: [Empty]  
 Sales Rep #1: DOC TEST  
 Sales Rep #2: [Empty]

Supp Phone #: 800-642-3161  
 Supp Account #: 104220

Buttons: Notes, Print PO, Exit

Figure Purchase Order View screen

## Due Button

The ability to change the Customer Name has been added back. If F8 is used, then this will only look at orders with that customer sequence number. If the name is entered manually, then it will match on name only.

## Picking Ticket

The Purchase Order Promise Date has been added to the Picking Ticket.

Page 1 06/27/17 1:31PM	<b>Picking Ticket</b> DOCUMENTATION COMPANY	Invoice: CG602628							
Sold To MENT, DOC U. 123 PAPER STREET ALICEVILLE, AL 35442	Ship To MENT, DOC U. 123 PAPER STREET ALICEVILLE, AL 35442	Pick Date: 06/27/17							
Customer Purchase Order: Sales Representative: DOC TEST Paid in Full: No		Tphone 1 : 2051234567							
Prod Code Roll/Item No.	Width	Beginning Amount	Amount Required	Ending Amount	Units	Status	Location	Store	Sign
*Line #0001 01 TESTW0 Style#/Color#: 36421/555738	ACCURATE 26.12/MOSSY DAK 120"	2500"	150"	2350"		CUT			
SKU: RCT623C30 1200 A								Supplier: MOHAWK INDUS	
Area 1 Cut									
Size Checked		Area		Size Checked		Area		Size Checked	
15'0"									
*Line #0002 81 CP/BA-G	CPT-(BASIC)-GLUEDOWN		180.00		SF	CUT			Supplier: W/C
Area 1 Area									
Amount Checked		Area		Amount Checked		Area		Amount Checked	
180.00									
*Line #0003 01 CG6026280003	YELLOW BRICK ROAD 12/OZ 120"	.....	250"	.....		On Order			Supplier: DOC U. ME
Area 1 Cut									
Size Checked		Area		Size Checked		Area		Size Checked	
25'0"									
Picking Ticket Standard Message: I received the above listed material									

Figure Picking Ticket Preview

A Standard Message can now be printed on the Picking Ticket.

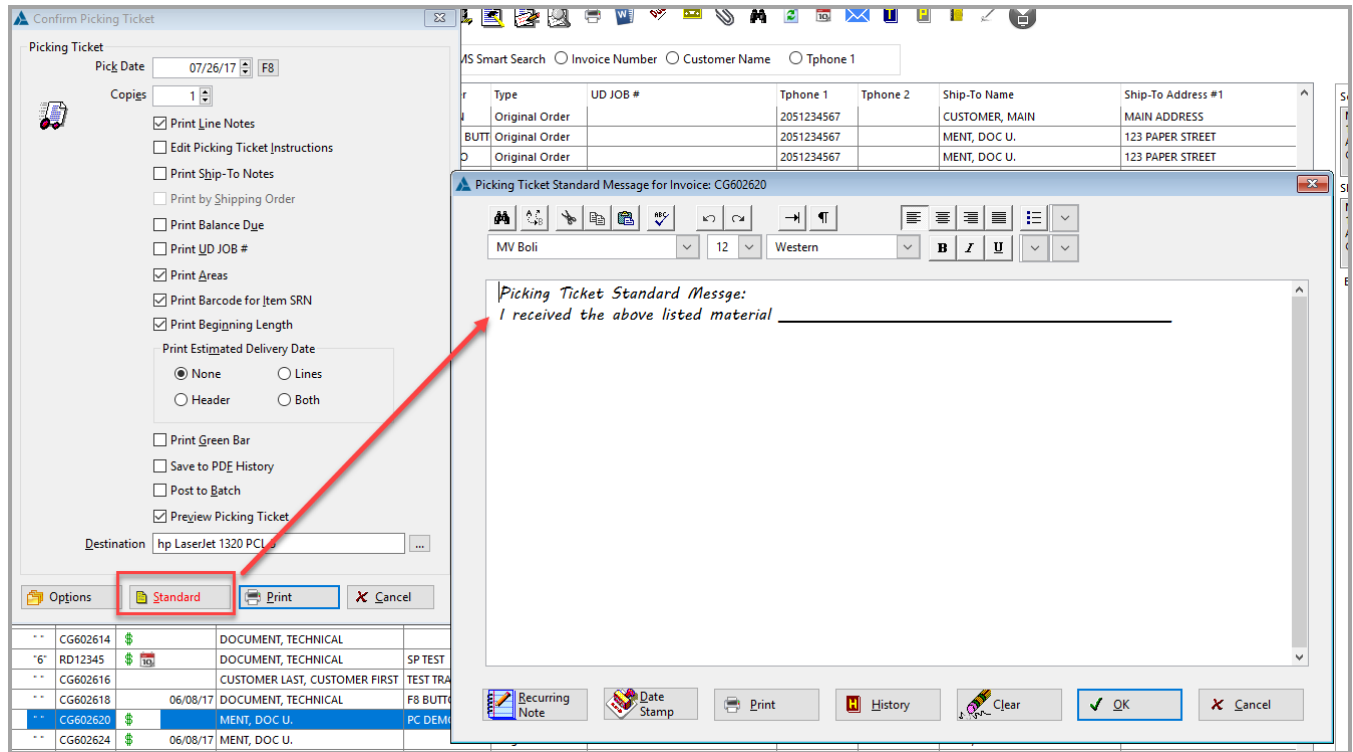


Figure Printing Screen

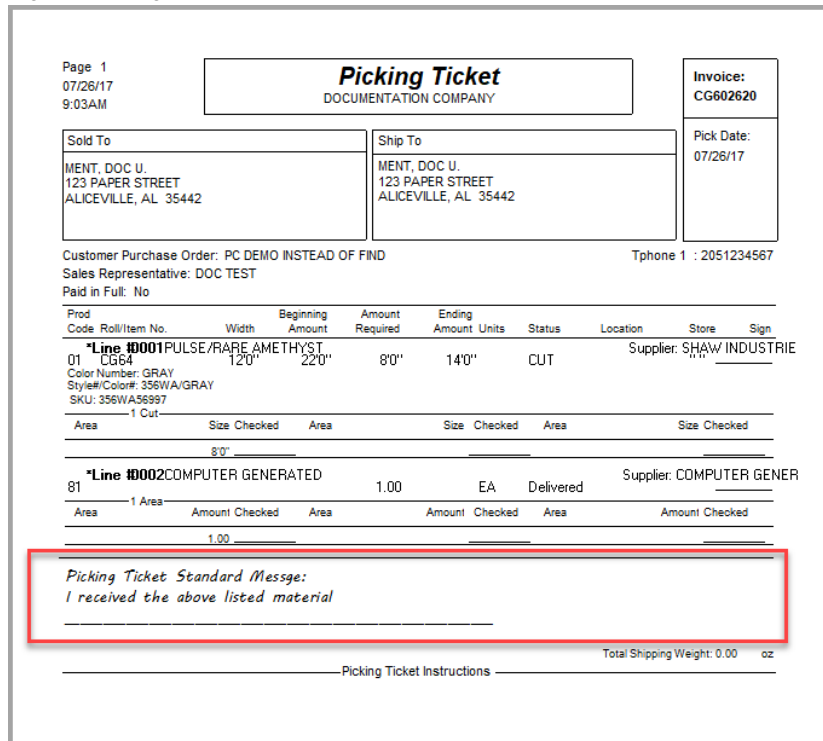


Figure Picking Ticket preview

## Products

Products in Order Entry now uses the combined cost in the Products browse screen when the System Option [Combine Miscellaneous Cost with Gross Cost](#) is set to Yes.

## Reports

### Batch Job Costing

[Reports](#)>[Batch Job Costing](#)

Batch Job Costing now allows for negative Gross Profit Percent.

Figure Batch Job Costing screen

When an Order fails to job cost, a message will appear showing the detailed reason the order was not ready to job cost.

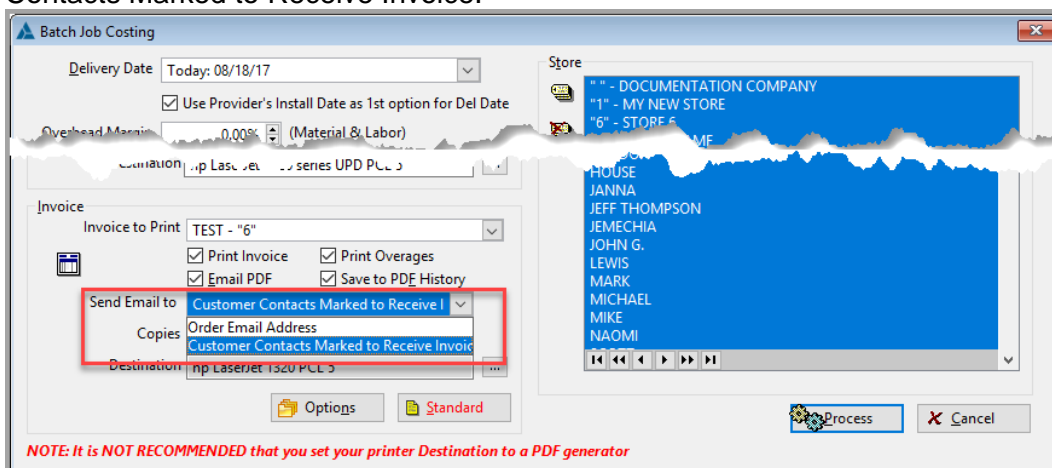
Some reasons are:

- Provider's file is not balanced with Order
- Gross Profit Percent is out of bounds
- Labor Profit Percent of 23% is out of bounds
- All lines are not in a "Delivered" status (not ERRM)
- All lines are not in a "Delivered" or "Job Costed" status (ERRM ONLY)
- This Order is Partial Billed by Legacy (Note: Not likely, you may want to eliminate this message)
- Unable to create Temporary Line File

- Order Lines are not in a proper status. Problem Lines: (will be listed)
- One or more Provider records does not have a Worker/Supplier entered.
- Order CGXXXXXX must be paid in full
- Overage Order CGXXXXXX must be paid in full
- Uncosted Inventory. Problem Lines: (will be listed)
- THIS ORDER IS NOT READY TO Job Cost. Reason: Uncosted Inventory. Problem Lines: (will be listed)
- Delivery Ticket Date not Valid
- Post Bill Sale (ERRM only)

Batch Job Costing now supports sending Ops Connect Invoices.

Under the Send Email to option the wording Statement Email Address has been changed to Customer Contacts Marked to Receive Invoice.



This option from the Contact Email if the Receive Invoices box is checked on the Contact screen.

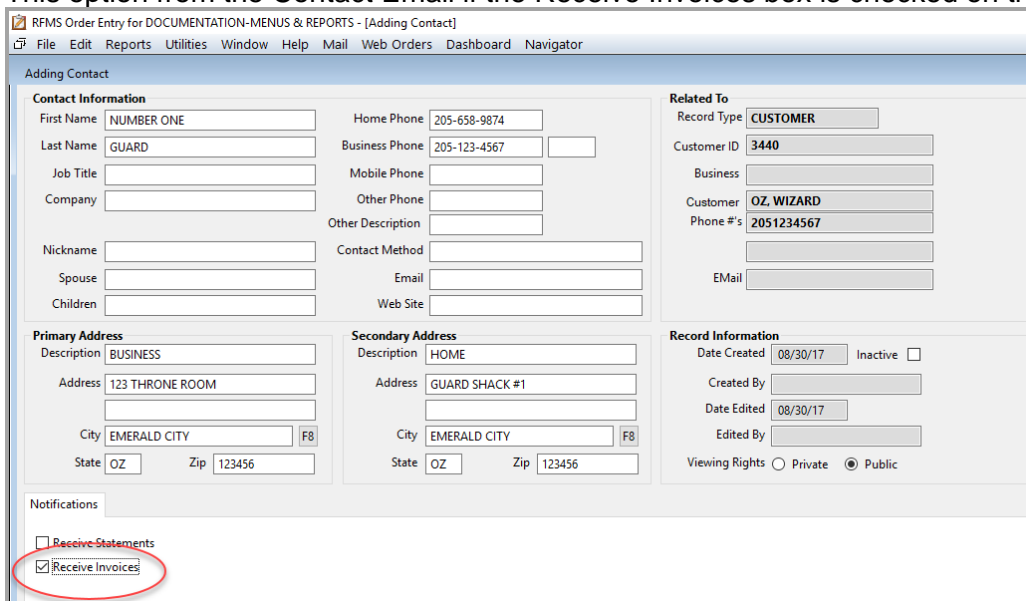


Figure Adding Contact screen

## My Commissions

[Reports > My Commissions](#)

The [Job Number Prompt](#) field has been added to the .csv file.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	Y
Comm_Pa	Debt_Sett	Del_Date	Date_Pa	Inv_Num	Control_N	Salesman	Cust_Nam	Mat_Only	Tot_Sales	Perc_Rate	Tot_Com	Profit	Comm_Ba	Com_Base	Comm_Ba	Comm_Sc	DaysToPa	ShipInfo	StoreCode	Job Number	LineComm		
1	20151204	20151204	CG502147	CG502147	DOC TEST	MENT, DO		990	1114.2	0.1525	91.64	600.91	0.5393	600.91	2	1	0	MENT, DO	" "				
1	20151204	20151204	CG502148	CG502148	DOC TEST	BITS N' BY		225	620.52	0.1675	68.54	409.22	0.6595	409.22	2	1	0	BITS N' BY	" "				
1	20160311	20151211	CG502149	CG502149	DOC TEST	MENT, DO		862.2	862.2	0.1675	90.59	540.81	0.6272	540.81	2	1	-91	MENT, DO	" "				
1	20170608	20170608	CG602555	CG602555	DOC TEST	BITS N' BY		0	0	0.0125	0	0	0	0	1	1	0	BITS N' BY	" "				
1	20170608	20170608	CG602618	CG602618	DOC TEST	DOCUMENT		0	0	0.0125	0	0	0	0	1	1	0	DOCUMENT	" "				
1	20170608	20170608	CG602625	CG602625	DOC TEST	DOCUMENT		0	0	0.0125	0	0	0	0	1	1	0	DOCUMENT	" "				
1	20170608	20160429	CG602638	CG602638	DOC TEST	MENT, DO		0	0	0.0125	0	0	0	0	1	1	-405	MENT, DO	" "				
1	20170608	20160526	CG602643	CG602643	DOC TEST	MENT, DO		0	0	0.0125	0	0	0	0	1	1	-378	MENT, DO	" "				
1	20170726	20170726	CG602644	CG602644	DOC TEST	DOCUMENT		0	0	0.0125	0	0	0	0	1	1	0	DOCUMENT	" "				
1	20170608	20170608	CG602679	CG602679	DOC TEST	MENT, DO		0	0	0.0125	0	0	0	0	1	1	0	MENT, DO	" "				
17											0												

## Utilities

### Config Creator

[Utilities > Set Up > Config Creator](#)

Settings in Config Creator will override the Print Columns settings in the Order Printing Options screen.

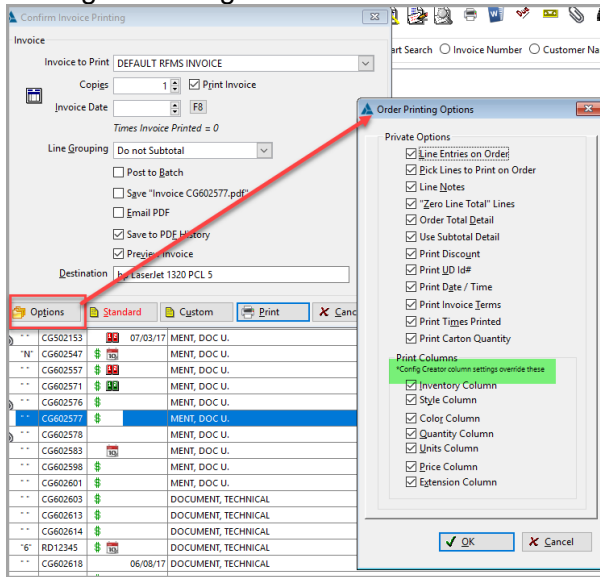
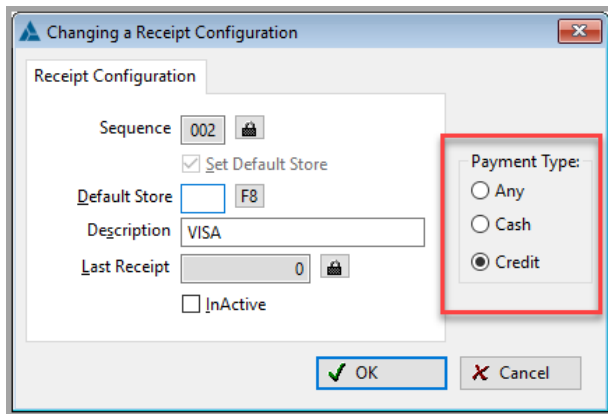


Figure Print Options screen

## Receipt Config

*Utilities > Set Up > Receipt Config*

Receipt registers can now have payment types specified.



Changing a Receipt Configuration

Receipt Configuration

Sequence: 002

Set Default Store

Default Store: F8

Description: VISA

Last Receipt: 0

InActive

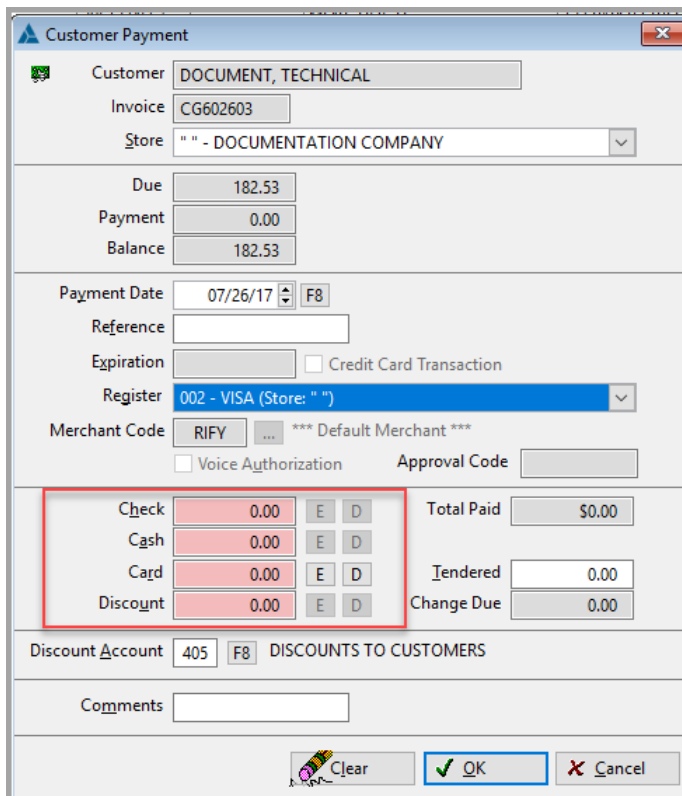
Payment Type:

- Any
- Cash
- Credit

OK Cancel

Figure Receipt Configuration screen

When posting a payment, the fields that were not selected in the Receipt Configuration screen will be disabled. For example, Register 002 is being used below therefore the only Payment type available is Credit.



Customer Payment

Customer: DOCUMENT, TECHNICAL

Invoice: CG602603

Store: "" - DOCUMENTATION COMPANY

Due: 182.53

Payment: 0.00

Balance: 182.53

Payment Date: 07/26/17

Reference:

Expiration:  Credit Card Transaction

Register: 002 - VISA (Store: "")

Merchant Code: RIFY

Approval Code:

Voice Authorization

Check: 0.00

Cash: 0.00

Card: 0.00

Discount: 0.00

Total Paid: \$0.00

Tendered: 0.00

Change Due: 0.00

Discount Account: 405 DISCOUNTS TO CUSTOMERS

Comments:

Clear OK Cancel

Figure Customer Payment screen

## Web Orders

Web Orders now have the ability to be sorted by store code (ascending and descending).

# Quotes

## Browse Screen

A Quote Total column has been added to the Browse Screen. It is a sortable column.

Store	Quote #	UD JOB #	Tphone 1	Tphone 2	Ship-To Name	Ship-To Address #1	Customer Type	Quoted	Quote Total(+)	Seque
"N"	E5603491		2057654321		DOCUMENT, TECHNICAL	145 TEST STREET	DOCUMENTATIO	03/09/16	0.00	24,3
"	E5703890		2057654321	2051234567	DOCUMENT, TECHNICAL	145 TEST STREET	DOCUMENTATIO	01/17/17	0.00	2
"	E5703892		2051234567		MENT, DOC U.	123 PAPER STREET	DOCUMENTATIO	01/17/17	136.25	24,
"	E5703873		2051234567		MENT, DOC U.	123 PAPER STREET	DOCUMENTATIO	01/17/17	239.80	24,
"	E5703875		2057654321	2051234567	DOCUMENT, TECHNICAL	145 TEST STREET	DOCUMENTATIO	01/17/17	327.00	24,
"	E5703893		2051234567		MENT, DOC U.	123 PAPER STREET	DOCUMENTATIO	01/18/17	327.00	24,
"	E5603497		2057654321	2051234567	DOCUMENT, TECHNICAL	145 TEST STREET	DOCUMENTATIO	03/17/16	436.00	24,
"	E5703874		2057654321	2051234567	DOCUMENT, TECHNICAL	145 TEST STREET	DOCUMENTATIO	01/17/17	445.22	24,
"	E5703894		2057654321	2051234567	DOCUMENT, TECHNICAL	145 TEST STREET	DOCUMENTATIO	01/18/17	1,635.00	24,
"	E5703876		2057654321	2051234567	DOCUMENT, TECHNICAL	145 TEST STREET	DOCUMENTATIO	01/17/17	1,962.00	24,
"	E5603493		2051234567		MENT, DOC U.	123 PAPER STREET	DOCUMENTATIO	03/10/16	2,880.13	24,3
"	E5603504		2051234567		MENT, DOC U.	123 PAPER STREET	DOCUMENTATIO	05/10/16	3,150.25	2
"	E5501659		2051234567		MENT, DOC U.	123 PAPER STREET	DOCUMENTATIO	12/17/15	4,086.20	24,
"	E5501658		2051234567		MENT, DOC U.	123 PAPER STREET	DOCUMENTATIO	10/14/15	6,105.00	24,
"	E5501657		2051234567		MENT, DOC U.	123 PAPER STREET	UK TEST	10/02/15	93,304.20	24,
"	E5703885		2051234567		MENT, DOC U.	123 PAPER STREET	DOCUMENTATIO	01/17/17	*****	24,

Figure Quote Browse Screen

## Quote Line

The Reference Line button has been removed from the add/change Quote Line screen since it does not apply to quotes.

## Copy Quotes

Quote # can now be manually entered if the system option "[Only Allow Computer Generated Invoices and Quotes](#)" is set to no.

Figure Copy Quote screen

## Notes

A Work Order Custom note can now be added to a quote.

Figure Notes screen

# Sample Status Report



The Sample Status Report now includes Telephone 1 and Email.

Page No: 1  
07/26/17  
09:32AM

DOCUMENTATION-MENUS & REPORTS  
SAMPLE STATUS REPORT

Due

Sub Sort By: Customer/Style/Color  
\*\*\* denotes that sample is due

Store: " "

Quote #	Customer	Style	Color	Out	Due	Returned
---------	----------	-------	-------	-----	-----	----------

Sales Rep: ANDREW  
\* ES300030 BOYD CONST., JULIE & BILL J FOREIGNER - FLECK - HEIRLOOM LACE (F) 01/07/13 01/09/13  
12'

Phone:

Email:

\* ES501661 CUSTOMER LAST, CUSTOMER PRIVATE ITEM NAME PRIVATE DESCRIPTION 12/28/15 12/30/15

Phone: 111-222-3333

Email:

\* ES603471 CUSTOMER LAST, CUSTOMER PRIVATE ITEM PRIVATE 80- 01/07/16 01/09/16  
NAME80- 45678902234567890323  
4567890223456789032 45678904234567890123  
3456789042345678901 45678902234567890323  
2345678902234567890 456789042  
323

Phone: 111-222-3333

Figure Sample Status Report preview

## Claims

The Ship To and Sold To on the Claim screen has been renamed Claim For and Claim Against.

Figure Claim screen

When selecting a Vendor for the Claims Against, the system will now bring over the vendor's phone number.

**Claim**

Claim # CG Inv\*\* F8 Store F8 Claim Date 06/29/17 F8 **Iphone 1 479-306-4663**

**Claim Against**

MY SUPPLIER  
413-B ALBANO DRIVE  
SPRINGDALE, AR 72762

**Claim For**

GOOD, GLINDA THE  
123 YELLOW BRICK ROAD  
TUSCALOOSA, AL 35401  
County: TUSCALOOSA

Sales Rep #1 0.00%  
Sales Rep #2 ANDREW 100.00%  
Time Slot -None-

Tax Status Exempt  
PO Number  
Status \*\* No Status Specified \*\*

Line #	Style	Product Code	Roll/Item Number	Color/Description	Status	Group
--------	-------	--------------	------------------	-------------------	--------	-------

Search Line Number 0000

Figure Claim screen

The ability to add and print a Work Order Custom Note on a claim has been added.

Claims

Search TEST

Store	Claim #	Cl
**	CL400003	AG
**	CL400004	SH
**	CL400007	SU
"1"	CL400008	SH
**	CL500020	MC
"N"	CL600134	B4
"N"	CL600135	AL
"1"	CL600136	AC

Work Order to Print: DEFAULT RFMS WORK ORDER

Print Order:  
 Area  
 Customer Order Line Number  
 Product Code / Style / Color / In

Print Work Order Line Notes  
 Print Balance Due  
 Print Rate  
 Print Labor  
 Print Sales Representative(s)  
 Encrypt Labor  
 Letterhead  
 Print Shipping Instructions  
 Print Color Number  
 Print SKU  
 Print Claim's Custom Note

Copies: 1

Email Work Order  
 Post to Bgch  
 Save to PDE History  
 Preview Work Order

Destination: hp LaserJet 1320 PCL 5

Claim Notes for Claim: CL400008

This is a Custom Note on the Work Order

Standard Custom Print

Figure Work Order in Claims

**WORK ORDER**

Sold To SHAW INDUSTRIES-RUGS SHAW RUGS		Install At TEST CUSTOMER TEST ADDRESS PC CUSTOMER TEST, AL 35452	
Order Number CL400008	Order Date 11/05/14	PO Number	Tphone 1

Area	PC Style/Item	Color/Description	Inventory #	Units	Width	Length	Ship Wt.	Quantity	Labor
<b>Customer Order Line Number: 0001</b>									
	01 PRIVATE STYLE 2	PRIVATE COLOR		SY	12'0"	12'6"		16.67	0.00
							<b>Line 0001 Total:</b>	<b>\$150.00</b>	16.67
<b>Customer Order Line Number: 0002</b>									
	01 18TH HOLE - 12'	AUTUMN	#28 MG-6	SY	12'0"	12'6"		16.67	0.00
SKU: 736U676110 Color Number: 76110									
							<b>Line 0002 Total:</b>	<b>\$300.00</b>	16.67
<b>Customer Order Line Number: 0003</b>									
	01 18TH HOLE - 12'	FAWN	CL400000003	SY	12'0"	10'0"		13.33	0.00
SKU: 736U676711 Color Number: 538424									
							<b>Line 0003 Total:</b>	<b>\$240.00</b>	13.33
									<b>Balance to be Collected: \$620.00</b>
									\$0.00

**This is a Custom Note on the Work Order**

*Standard Message prints on every work order*

Sales Representative: ANDREW

Figure Work Order Preview

## Batch Processing

The ability to [Copy Browse Information](#) has been added to the Browse screen.

The columns on the Browse screen are now sortable

Picking Tickets
 Work Orders
 Cut Lines

Order No Customer UD JOB # Tphone 1 Order Date UD Date1 EDD Purchase Order Number Ship-To Name Ship-To Address #1

Search Order No

Store	Order No	Delivered	Customer Name[+1]	PO/Sidemark[+2]	Order Type	UD JOB #
CG102627			VAIL, TARA		Original Order	HARDWOOD
CL600073			VALENCIA, JESUS	WALTERS, RBT	Claim	CG601892
CG202066			WALKER/BOOTH		Original Order	
CG202774			WALLACE, DEBBIE		Original Order	705 FAIR OAKES LANE
CG203095			WALLACE, DEBBIE	CHARGE TO CERAMIC CREW	Original Order	705 FAIR OAKES LANE
CG202057			WAR CONSTRUCTION		Original Order	BETHEL BAPTIST
CG202777			WAR CONSTRUCTION		Original Order	PUBLIC SAFETY LOGISTIC
CG302537			WAR CONSTRUCTION		Original Order	
CL700076			WARRANTY RPAIRS	150 FOREST GLEN	Claim	CG600991

Figure Batch Processing Browse screen

If a column on the browse screen is resized, then the new size of the column is saved.

# Word Merge

Dye/Run Lot, Price Modifier, and Price Modifier % have been added to the Word Merge function.

The ability to pick the line(s) to print has been added to the Word Merge Invoice.

1. Make sure the Pick Lines to Print Field is in the Prototype.

DOCUMENTATION COMPANY  
 STORE ADDRESS  
 FAX: 111-222-3333  
 NORTHPORT, AL 35476  
 Telephone: 205-349-2233 Fax: 205-349-3393

ST000005

Sold To					Ship To				
OZ, WIZARD 123 THRONE ROOM EMERALD CITY OZ 123456					OZ, WIZARD 123 THRONE ROOM EMERALD CITY OZ 123456				

Order Date	PO Number	Phone	Job Number
08/29/17		2051234567	

Pick Lines to Print Area	PC	Inventory	Style	Color	Size	User Defined	Qty	Unit	Price	Total
Area	PC	Roll/Item Num	StyleName	ColorName	WxL	Serial Num	Qty	Unit	Price	Total
PrintLineNotes Standard Message for Invoice OrderAttachments Salesperson: DOC TEST										

Invoice Message from System Option

Material:	1,520.00
Services:	225.00
Misc Charges:	0.00
Sales Tax:	0.00
Misc Tax:	0.00
CA Crpt Stewardship Assessment:	0.00
<b>INVOICE TOTAL:</b>	<b>\$1,745.00</b>
Less Payment(s):	0.00
<b>BALANCE DUE:</b>	<b>\$1,745.00</b>

PrintLines  
SortByArea

Figure Invoice Prototype

2. After clicking Merge & Open button, the Pick Lines screen will appear. Tag and select the lines to add to the invoice.

RFMS Order Entry for DOCUMENTATION-MENUS & REPORTS - [Customer Order Lines for ST000005]

File Edit Reports Utilities Window Help Mail Web Orders Dashboard Navigator

← ? 🔍 + 📄 📄 📄 🗑️ 🔍 🗑️ 📄 🗑️

Line #	Group	Product Code	Roll/Item #	Style/Item	Color/Description
0001		06-CERAMIC	*Pricing*	TELL ME A STORY	PORRIAGE TAN
0002		01-CARPET	*Pricing*	BLACK AS NIGHT	POISON APPLE
0003		98-REFERRAL FEES	*UnRef*	REPAIR TOOL	

Figure Pick Lines screen

# Customers

*File>Customers*

A warning message now pops up if the Business field is blank and the customer record is set to use Business as the Export Name

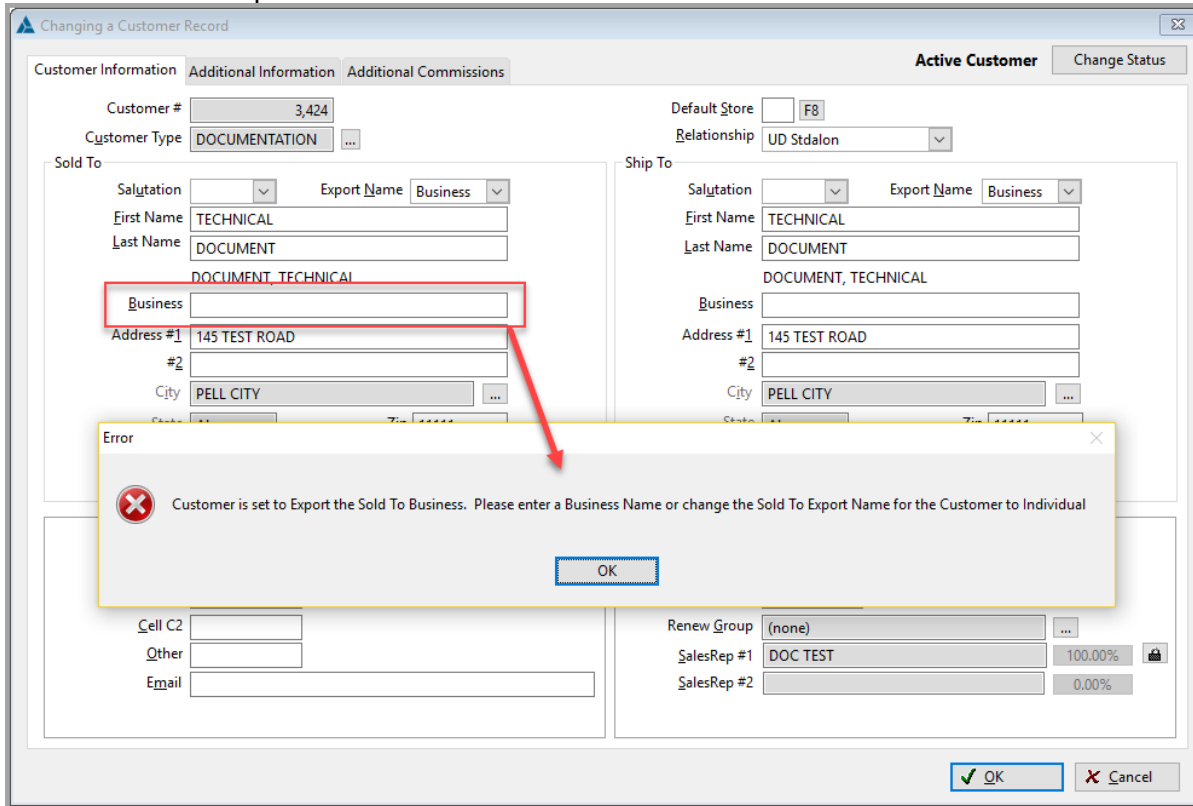


Figure Changing/Adding Customer Record screen

## Customer Contacts

Customers can now have contacts. A Contact is an individual person, who can be related to a Customer, like a Purchasing Agent who works for a builder, or a non-related Contact, like a Mill Rep.

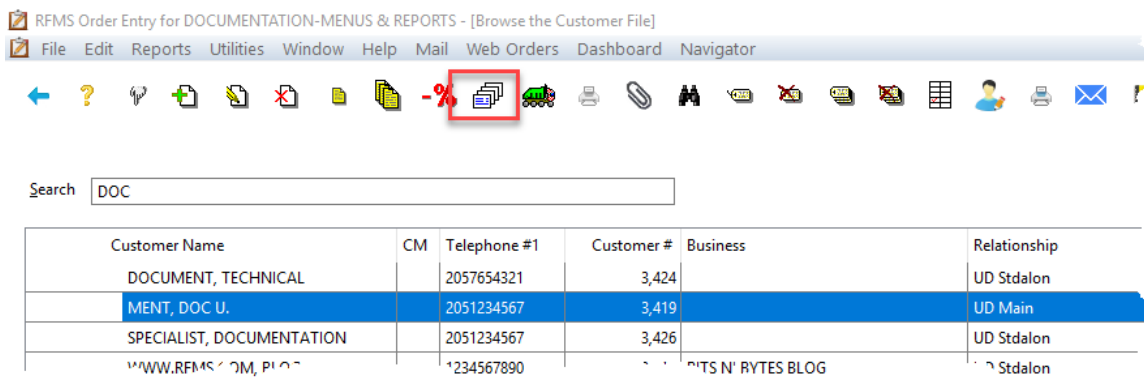


Figure Customer Browse screen

From the Contact screen, a contact can be selected, added, edited, deleted, or copied. An email can also be sent from this screen.



Figure Contact screen tool bar

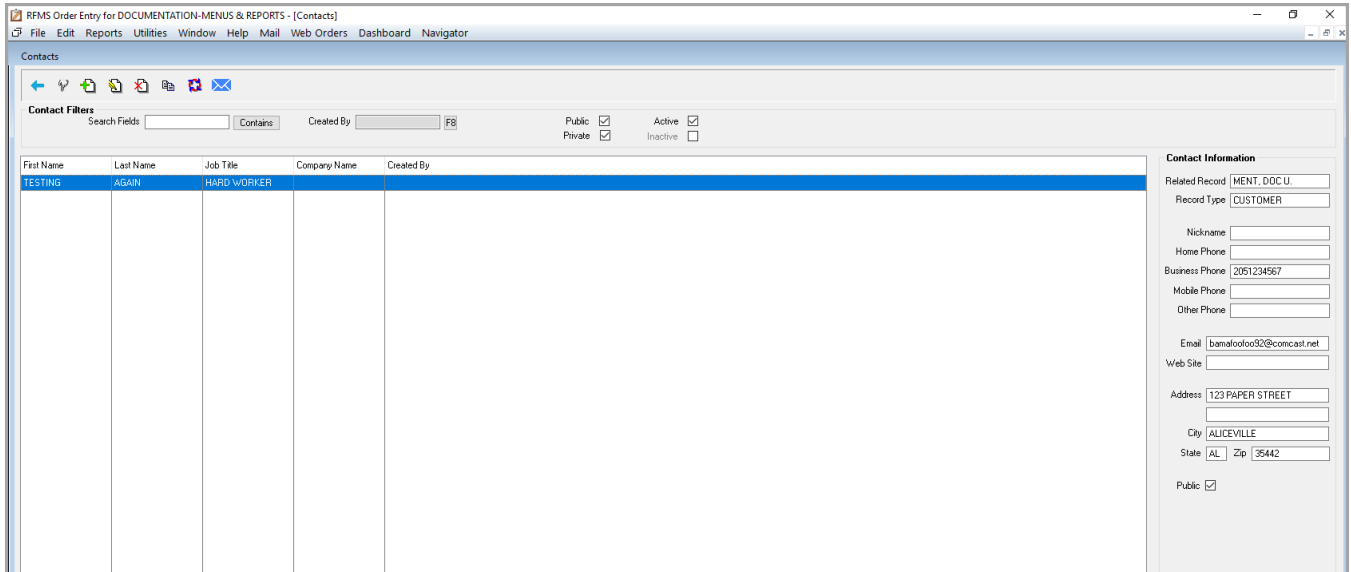


Figure Contacts screen

On the Adding/Editing Contact screen, if the contact is to receive statement or invoices by email then the appropriate boxes in the bottom left need to be checked.

RFMS Order Entry for DOCUMENTATION-MENUS & REPORTS - [Adding Contact]

File Edit Reports Utilities Window Help Mail Web Orders Dashboard Navigator

Adding Contact

**Contact Information**

First Name: TESTING Home Phone: [ ]  
Last Name: AGAIN Business Phone: 205-123-4567 [ ]  
Job Title: HARD WORKER Mobile Phone: [ ]  
Company: [ ] Other Phone: [ ]  
Other Description: [ ]  
Nickname: [ ] Contact Method: [ ]  
Spouse: [ ] Email: bamafoofoo92@comcast.net  
Children: [ ] Web Site: [ ]

**Related To**

Record Type: CUSTOMER  
Customer ID: 3419  
Business: [ ]  
Customer: MENT, DOC U.  
Phone #'s: 2051234567  
E-Mail: [ ]

**Primary Address**

Description: [ ]  
Address: 123 PAPER STREET  
City: ALICEVILLE F8  
State: AL Zip: 35442

**Secondary Address**

Description: [ ]  
Address: [ ]  
City: [ ] F8  
State: [ ] Zip: [ ]

**Record Information**

Date Created: 08/18/17 Inactive:   
Created By: [ ]  
Date Edited: 08/18/17  
Edited By: [ ]  
Viewing Rights:  Private  Public

**Notifications**

Receive Statements  
 Receive Invoices

Figure Adding Contact screen



Notes:

If more than one contact is checked to receive statements for one customer record, then all of the contacts will receive the statement email.

If a statement email address is already listed for a customer, it will automatically create a contact for the customer.

# Reports

## Provider Earnings

[Reports](#)>[Provider Earnings](#)

A window now pops up with buttons to select the report to run. The buttons have the ability to be password protected.

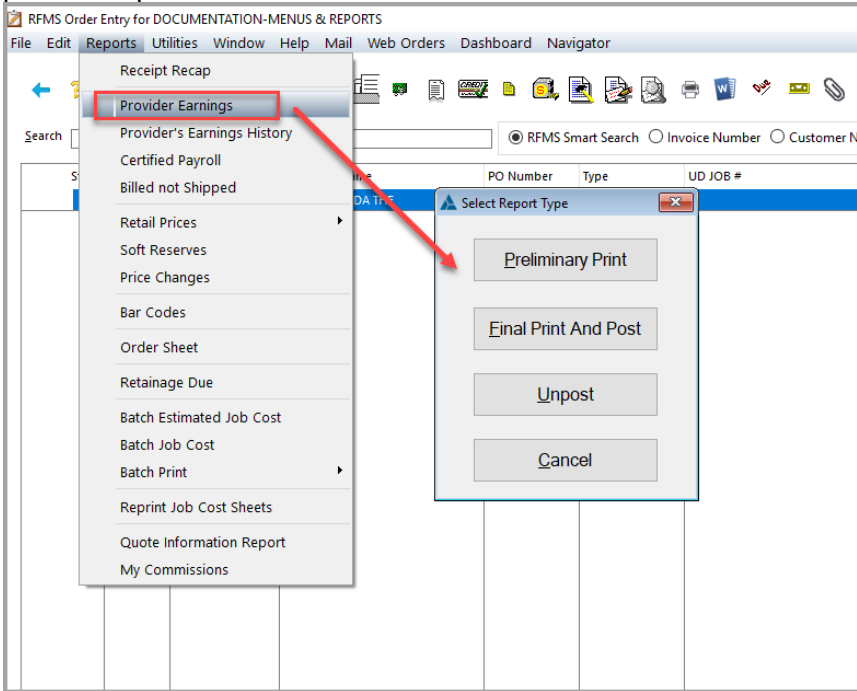


Figure Provider Earnings Report Types screen

The ability to send to CSV has been added to the options screen.

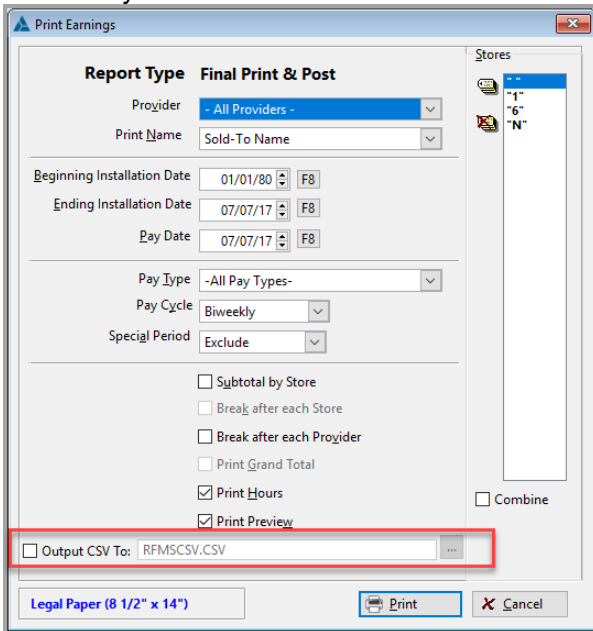


Figure Provider Earnings Report Options screen

---

## Utilities

### Cities

*Utilities>Set Up>Cities*

The City List can now be exported to a CSV file.

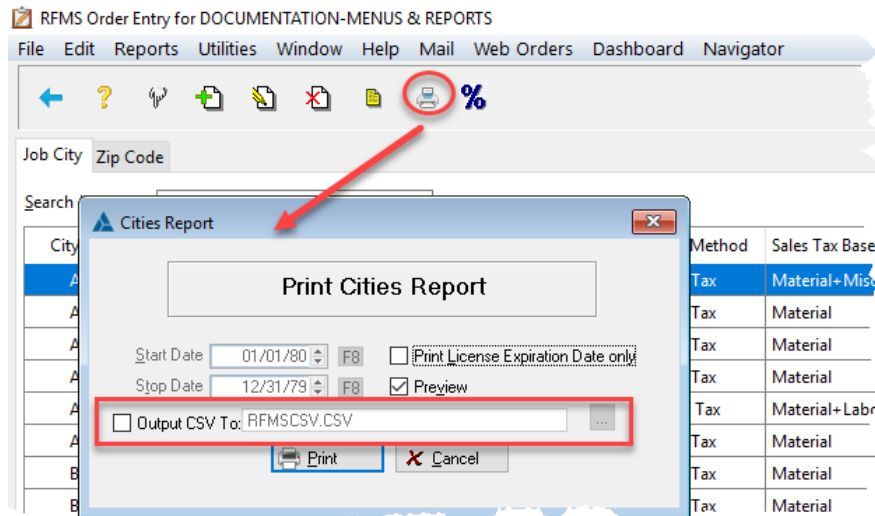


Figure Print Cities Report screen

---

## Inventory

### System Options

#### Starting Screen

*>Utilities>System Options>Inventory>Purchase Orders  
Category Configuration*

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

This option allows specifying which screen in Inventory to start in when first starting the program. Choose to start in Purchase Orders, Roll Inventory, Item Inventory, Receiving/Costing, or None.

- Purchase Orders - starts with the Purchase Order Browse screen.
- Roll Inventory - starts with the Roll Inventory Browse screen.
- Item Inventory - starts with the Item Inventory Browse screen.
- Receiving/Costing - start with the Receiving/Costing Process screen.
- None - starts with the main Inventory screen, with no windows open. This is the default setting.

# Purchase Orders

## Browse Screen

The Browse Screen can now be sorted by Promise Date.

PO # - Line #	Ordered	SC	PC	Supplier	Status	Private Style / Name	Private Color / Description	Promise Date	Length	Qty-Ord	Qty-Rcvd
#ST05937-0001	07/22/05	" "	01	SHAW INDUSTRIES	Canceled	ACADEMY 15	DECO BEIGE	07/27/05	70.00	116.67	0.00
CG600227-0001	01/31/06	" "	01	SHAW INDUSTRIES	Canceled(EC)	ABANDON	AVALON	01/31/06	3.00	4.00	0.00
CG600227-0002	01/31/06	" "	01	SHAW INDUSTRIES	Canceled(EC)	ABANDON	AVALON	01/31/06	3.00	4.00	0.00
#ST06121-0001	02/02/06	" "	01	SHAW INDUSTRIES	Canceled	ABANDON	AZURE MOSS	02/02/06	1.00	1.33	0.00
#ST06120-0001	02/02/06	" "	01	MOHAWK CARPET CORP	Canceled	ACRE LANE	CONCRETE	02/03/06	1.00	1.33	0.00

Figure Purchase Order Browse screen

## Add/Edit Purchase Order Screen

When adding a Stock PO and selecting to look in Roll/Item Inventory, the [RFMS Smart Search](#) and the Find has been added.

Inserting Purchase Order # #ST08852-0001 Line # 0001

PO Line # #ST08852-0001  
 Order Date 07/27/17  
 Store Code " " FB

Product Code 01 FB  
 Manufacturer  
 Supplier  
 Private Supplier  
 Private Style  
 Style  
 Color  
 Units SY FB  
 Roll # #ST088520001 FB  
 Style #  
 Priv Style #  
 Color #  
 Priv Color #  
 UD Id #  
 SKU  
 FOB  
 Req Dye Lot  
 Collection  
 Priv Collection  
 Builder  
 Subdivision  
 Block Lot

Width 0.00  
 Length 0.00 FB  
 Roll/Cut  
 Cost \$0.0000 FB  
 Amt Ord 0.00 SY  
 Amt Rcvd 0.00

Footage Order  
 Roll Order  
 Min Len 0.00  
 Max Len 0.00

Private Color / Description Promise Date Length Qty-Ord Qty-Rcvd Unit Cost Total Cost UD Date2 MD

Roll Inventory - Searching for Style- Color- Dye Lot-  
 Search PC:01 DOC

SC	PC	Roll #	Supplier	Private Supplier	PO #	Style	Color	Style #	Color #
" "	01	#ST086740001	DOC U. MENT	CARPET ONE	#ST086740001	18TH HOLE - 12'	FALLING RAIN	35422	538426
" "	01	RFMS	DOC U. MENT	CARPET ONE	#ST087590002	18TH HOLE - 12'	FALLING RAIN	35422	538426
"N"	01	CG115	DOC U. MENT	CARPET ONE	#ST086740001	18TH HOLE - 12'	FALLING RAIN	35422	538426
"N"	01	CG126	DOC U. MENT	CARPET ONE	#ST087590002	18TH HOLE - 12'	FALLING RAIN	35422	538426
"1"	01	CG55	DOC U. MENT	CARPET ONE	#ST085940001	18TH HOLE - 12'	MUTINY	35422	538423
" "	01	CG56	DOC U. MENT	CARPET ONE	#ST085940001	18TH HOLE - 12'	MUTINY	35422	538423
" "	01	CG9	DOC U. MENT	CARPETS PLUS	#ST061200002	ACRE LANE	CONCRETE	CT205	931
" "	01	CG26	DOC U. MENT	DOC U. MENT		BASE	MED BROWN		
" "	01	CG27	DOC U. MENT	DOC U. MENT		BASE	MED BROWN		
" "	01	CG18	DOC U. MENT	DOC U. MENT		BERBER	LIGHT BROWN		
" "	01	CG131	DOC U. MENT	DOC U. MENT		BLACK AS NIGHT	GASTON		
" "	01	CG7040770002	DOC U. MENT	DOC U. MENT	CG7040770002	BLACK AS NIGHT	HUNTSMAN		
" "	01	CG7041320001	DOC U. MENT	DOC U. MENT	CG7041320001	BLACK AS NIGHT	MAGIC MIRROR		
" "	01	CG7040770001	DOC U. MENT	DOC U. MENT	CG7040770001	BLACK AS NIGHT	SEA WITCH		
" "	01	CG5021070001	DOC U. MENT	CARPET ONE	CG5021070001	BOSA NOVA SUPREME -	CRIMSON WINE	5490493	168
" "	01	CG6025570008	DOC U. MENT	TEST 2	CG6025570008	CHAMPIONS	CRYSTAL WHITE		
" "	01	#ST087270001	DOC U. MENT	TEST 2	#ST087270001	CHAMPIONS	HOUSTOOTH		
" "	01	CG6025570004	TEST	TEST	CG6025570004	CHAMPIONS	HOUSTOOTH		
" "	01	CG6025980001	DOC U. MENT	TEST 2	CG6025980001	CHAMPIONS	HOUSTOOTH		

Figure Stock PO Roll Inventory screen

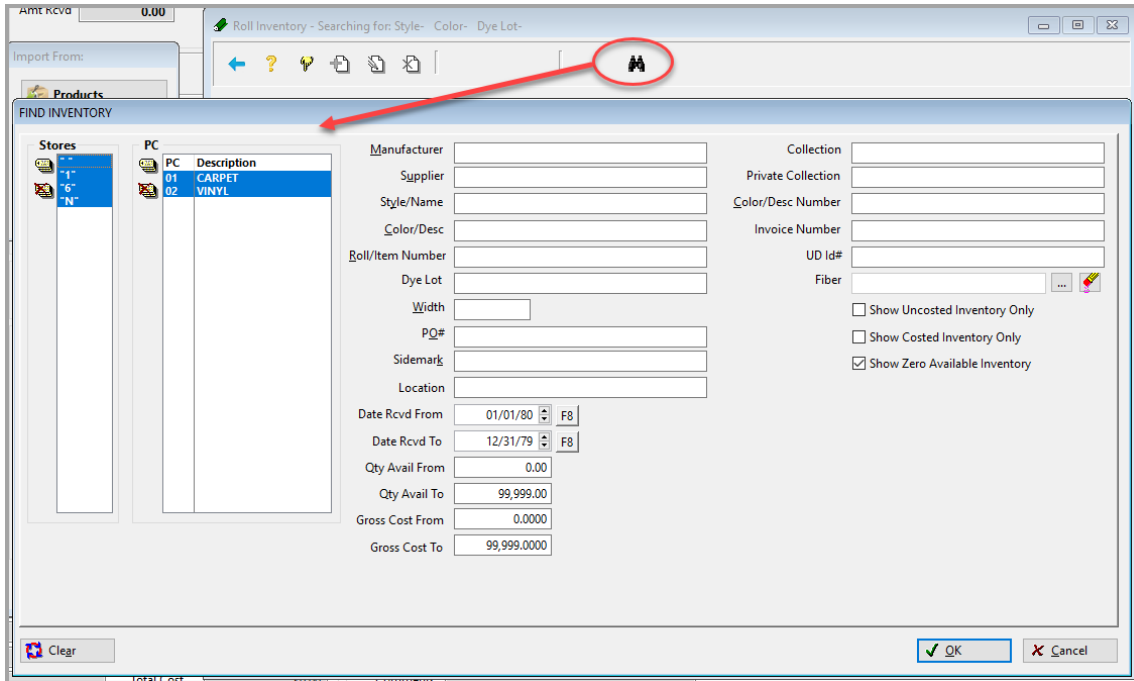


Figure Find screen

The Cost field will be highlighted violet if there is a special cost that has been added on the order line.

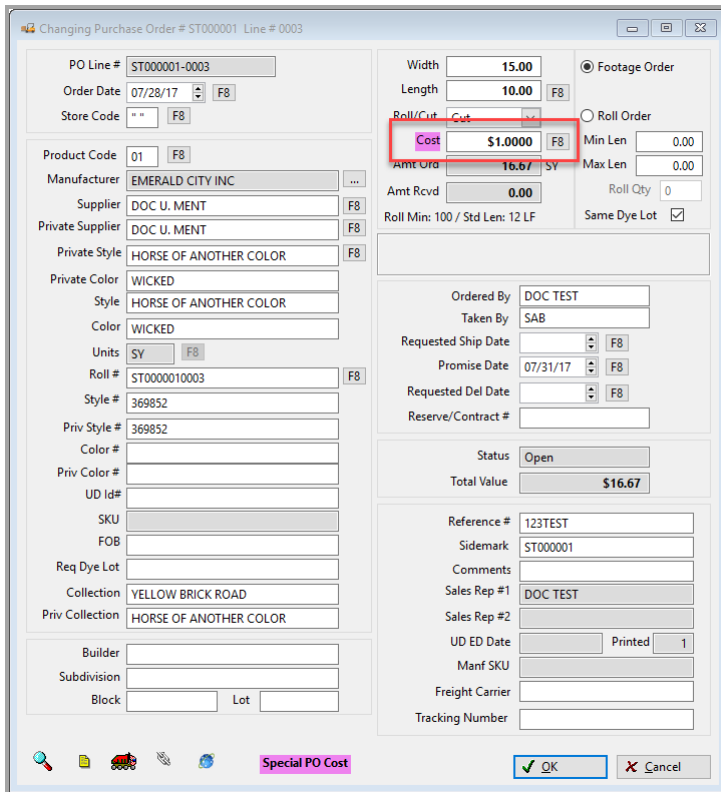


Figure Edit Purchase Order screen

The Comment in the Special PO Cost screen will display on the Purchase Order screen in the Comment field.

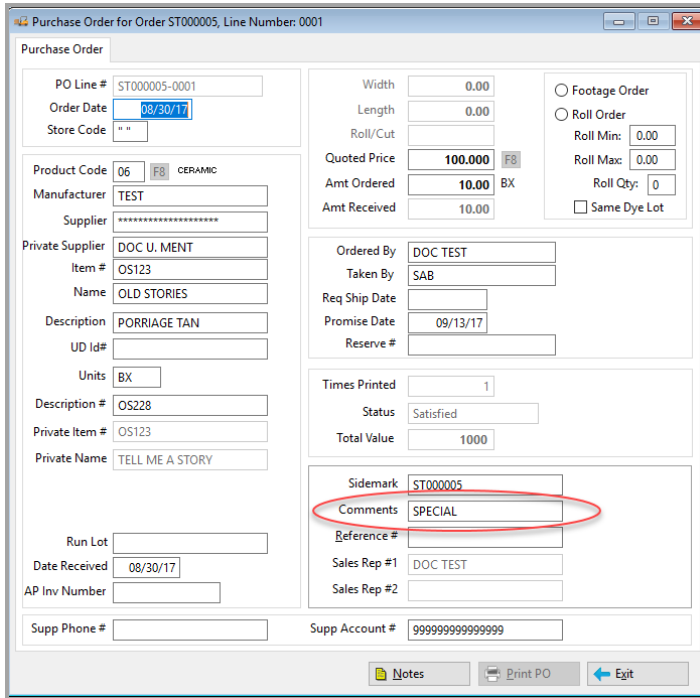


Figure Purchase Order screen

The Freight Carrier and Tracking Number have been added.

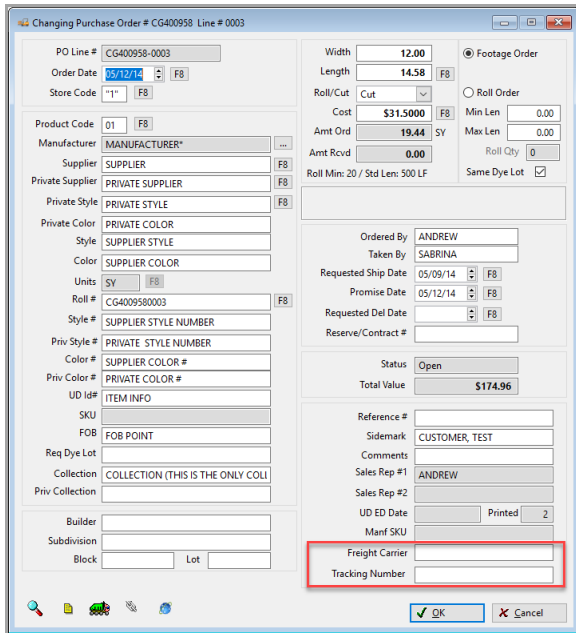


Figure Edit Purchase Order screen

## Auto PO Generation

The Line Estimated Delivery Date and the User Defined Job Number have been added to the To Buy List screen.

SC	PC	Style/Item	Color/Desc	Roll/Item #	Width	Length	Item Size	Qty	Units	Unit Cost	Inv. #	Line	Total Cost	SKU	UD Date1	EDD	UD Date2	MD	Line Del Date	UD JOB #	Matched Inventory	Inv
**	03	PATRIOT PRIDE	CAROLINA BLUE	2589			0'0"X0'0"	25.00	EA	0.2000	CG704070	3	5.00									
**	04	PAD 7/16	00001	PAD 7/16			6'0"X60'0"	1.00	SF	0.0000	CG704051	1	0.00							PAD CROSSOVER		
**	06	TELL ME A STOR	OS123				6'0"X60'0"	25.00	BX	25.0000	CG704120	2	625.00									
**	10	AMERICAN PATR	STARS AND STR	1776			10'0"X8'0"	15.00	EA	17.7600	CG704110	3	266.40			04/26/17					45729	
**	11	MILITARY TES	WHITE							15.0000	CG602215	4	199.95								451988	0001

Figure To Buy List screen

The Find screen has been redesigned and the Product Code, Style/Name, and Color Description has been added.

Auto PO Generation - Find

Supplier:  F8

Style/Name:

Color/Description:

Invoice Number:

Est Del Date From: 01/01/80 F8

Est Del Date To: 12/31/79 F8

Measure Date From: 01/01/80 F8

Measure Date To: 12/31/79 F8

OK Cancel

Stores: "1", "6", "N"

PC Description

- 01 CARPET
- 02 VINYL
- 03 REMNANTS
- 04 PAD
- 05 WALL PAPER
- 06 CERAMIC
- 07 WOOD
- 08 SUPPLIES
- 09 SUNDRIES
- 10 AREA RUGS
- 11 LUXURY & VINYL TILE
- 12 DRAPERIES
- 13 LAMINATES
- 14 \*\* UNDEFINED \*\*
- 15 \*\* UNDEFINED \*\*
- 16 \*\* UNDEFINED \*\*
- 17 \*\* UNDEFINED \*\*
- 18 \*\* UNDEFINED \*\*
- 19 GUM

Clear

Figure Find Screen for Auto PO

## Large Print Standard Purchase Order

The Amount Ordered line now includes the Unit of Measurement.

**PURCHASE ORDER**

PO NUMBER CG602758    ACCOUNT NUMBER 999999999999999    DATE 07/18/17    Page No. 1

<b>From</b>		CG602758
MY NEW STORE PO BOX 1123 TUSCALOOSA, AL 34758 Tel: 205-943-2282 Fax: 205-943-2283		
<b>Ship To</b>	<b>Supplier</b>	
MY NEW STORE 82 SKYLAND BLVD TUSCALOOSA, AL 34758 Tel: 205-943-2282 E-mail: 303456789022345678903234567890	DOC U. MENT	

PO #: CG602758-0001    Roll / Item #: -----    Promise Date: 09/30/16  
 Order Date: 09/30/16    Style / Name: PRIVATE STYLE 2    Roll / Cut: Roll  
 Product Code: 01    Color / Desc: SUPPLIER COLOR    Width: 12.00  
 Taken By: D    Private Style:    Length: 37.50  
                                  Private Color:  
                                  Style #: PRIVATE STYL  
                                  Color#: SUPPLIER COLOR  
 Comments:    **Amount Orderec 50 SY**  
                                  Quoted Price:

SideMark: CG602758

Figure Large Print Standard PO preview

## Receiving/Costing

### Open Purchase Order Browse Screen

The Supplier Style/Name and Supplier Color/Description have been added to the Open Purchase Orders Browse screen.

Open Purchase Orders - - Costing / Receiving

PO #    Supplier

Search Supplier     Blue = already selected for Receiving

PO # - Line #	Ordered	SC	PC	Supplier	Status	Private Style/Name	Private Color/Description	Private Style#/Item#	Size	Style / Name[+1]	Color / Description[+2]
ST000001-0003	07/28/17	" "	01	DOC U. ME	Open	HORSE OF ANOTHER COL	WICKED	369852	15.00	HORSE OF ANOTHER	WICKED
CG502151-000	12/14/15	" "	06	DALTILE	Open	KEYSTONE BLENDS FIEL	PINK BLEND	27805	0'0.96	KEYSTONE BLENDS FIE	PINK BLEND
CG400970-000	05/12/14	"1"	01	KRAUS CAI	Open	ZUMWALT - 12'	BLACK BEAUTY	10103794	12.00	NORTH ETCHING - 12'	TWILIGHT
CG704132-000	06/07/17	" "	06	DOC U. ME	Open	TELL ME A STORY	GLASS SLIPPER	OS123	0'0'X	OLD STORIES	GLASS SLIPPER

Figure Open Purchase Orders screen

The ability to sort by Date Received in the Not Costed Rolls and Items screens has been added.

PO #	Style	Color	Style #	Color #	SKU	Dye Lot	Date Rcvd[*]	Invoice #
CG7040840003	*N/A	ARTEMIS	N/A	500209			03/29/17	
CG7040850001	*N/A	ARTEMIS	N/A	500209			03/29/17	
CG7040850001	*N/A	ARTEMIS	N/A	500209			03/29/17	
CG7040860001	GREAT IDEA	BALSA	TRINI	965			03/29/17	
CG7040860001	GREAT IDEA	BALSA	TRINI	965			03/29/17	
CG7041020001	*PRIVATE STYLE	NEW COLOR	*PRIVATE	NEW CO			04/21/17	
CG7041020002	*PRIVATE STYLE	NEW COLOR	*PRIVATE	NEW CO			04/21/17	
CG7041030001	PRIVATE STYLE 2	PRIVATE COLOR	PRIVATE	PRIVATE			04/21/17	
CG7041020003	*PRIVATE STYLE	NEW COLOR	*PRIVATE	NEW CO			04/21/17	
CG7041020004	*PRIVATE STYLE	NEW COLOR	*PRIVATE	NEW CO			04/21/17	
CG7041020005	*PRIVATE STYLE	NEW COLOR	*PRIVATE	NEW CO			04/21/17	
CG7041020006	*PRIVATE STYLE	NEW COLOR	*PRIVATE	NEW CO			04/21/17	
CG7041040001	*PRIVATE STYLE	NEW COLOR	*PRIVATE	NEW CO			04/21/17	
CG7041020006	*PRIVATE STYLE	NEW COLOR	*PRIVATE	NEW CO			04/21/17	
CG6025750017	PRIVATE STYLE	NEW COLOR	PRIVATE			DYE LOT	05/08/17	
CG4009990001	BESTSELLER	HARVEST MOON	N/A	0217			05/15/17	
*ST088430001	ABERDEEN AXIS 12 FT	PINECASTLE QUARRY	MANAX1	AX011	MANAX011121		05/17/17	
CG7041480001	ARTISTIC IMPRESSIONS	NEPTUNE	1916	19			06/21/17	
CG7041480001	ARTISTIC IMPRESSIONS	NEPTUNE	1916	19			06/21/17	

Figure Not Costed Rolls screen

### Receiving Items with Less Amounts

For order lines with multiple areas, there is no way to automatically match the amount received to the work order lines, so in version 17.0, we started creating a negative computer generated work order line for the amount of the split order line on line 1 and a positive computer generated work order line on the new line. In this version, if there is only one area/work order line on a customer line, the work order lines are simply split match the order lines.

The Supplier Style/Name and Supplier Color/Description have been added to the Open Purchase Orders Browse screen.

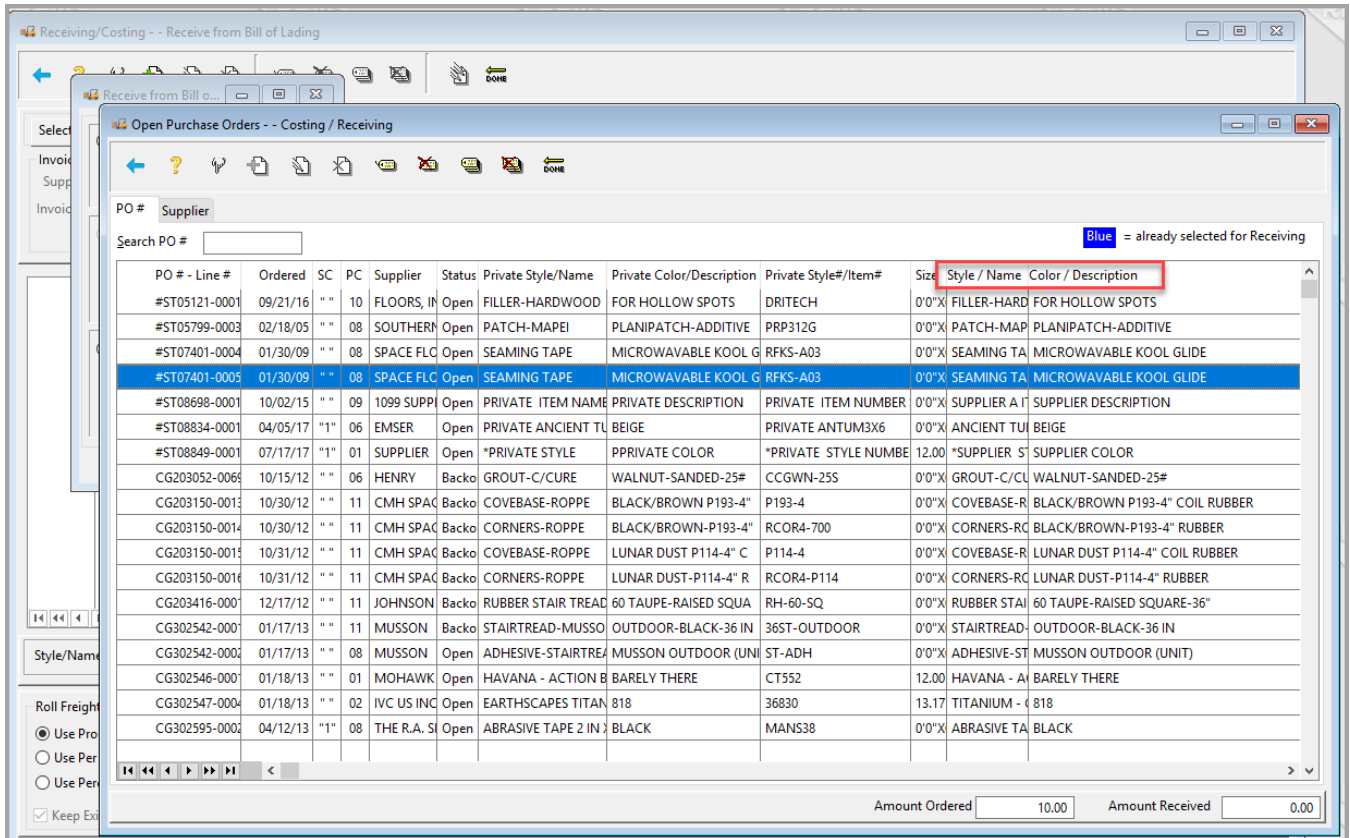


Figure Open Purchase Order Browse screen

The Find screen has been added to the Not Costed Rolls screen.

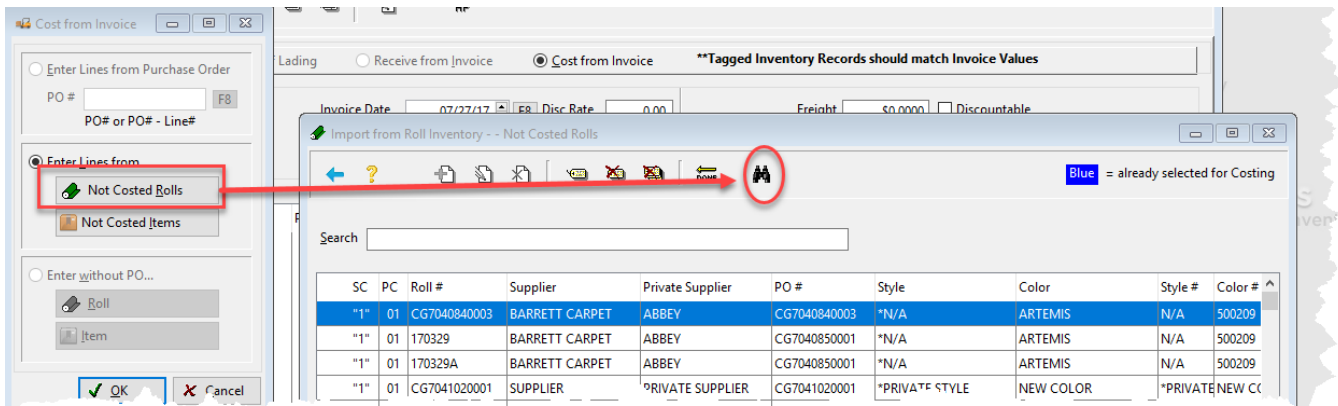


Figure Not Costed Rolls screen

Beginning Length has been added to the Not Costed Rolls Browse Screen.

SC	PC	Roll #	Supplier	Private Suppl	PO #	Style	Color	Style #	Color #	SKU	Dye Lot	Date Rcvd	Invoice #	Invoice Date	Cost	Beg Length	Remark
"1"	01	CG7040	BARRETT	ABBEY	CG704	*N/A	ARTEM	N/A	500209			03/29/17			\$20.79	50.00	CG704084
"1"	01	170329	BARRETT	ABBEY	CG704	*N/A	ARTEM	N/A	500209			03/29/17			\$20.79	450.00	CG704085
"1"	01	170329	BARRETT	ABBEY	CG704	*N/A	ARTEM	N/A	500209			03/29/17			\$20.79	450.00	CG704085
"1"	01	CG7041	SUPPLIER	PRIVATE SUPP	CG704	*PRIV	NEW CO	*PRIVA	NEW CO			04/21/17			\$31.50	100.00	CG704102
"1"	01	CG7041	SUPPLIER	PRIVATE SUPP	CG704	*PRIV	NEW CO	*PRIVA	NEW CO			04/21/17			\$31.50	10.00	CG704102
"1"	01	CG7041	SUPPLIER	PRIVATE SUPP	CG704	*PRIV	NEW CO	*PRIVA	NEW CO			04/21/17			\$31.50	10.00	CG704102
"1"	01	CG7041	SUPPLIER	PRIVATE SUPP	CG704	*PRIV	NEW CO	*PRIVA	NEW CO			04/21/17			\$31.50	10.00	CG704102
"1"	01	CG7041	SUPPLIER	PRIVATE SUPP	CG704	*PRIV	NEW CO	*PRIVA	NEW CO			04/21/17			\$31.50	10.00	CG704102

Figure Not Costed Rolls Browse screen

Qty Received has been added to the Not Costed Items Browse Screen.

SC	PC	Item #	Supplier	Name	Descripti	Lading #	UD Id#	PO #	Ref #	SKU	Priv Supp	Date Rcvd	Invoice Date	Invoice #	Cost	Qty Rcvd	Seq #
"1"	03	02000	MILLIKEN	CAMEO	OPAL	1234		#ST08		45,385	508952	CARPET C	04/07/14		30.17	5.00	
" "	18	02523051	PEERLESS	MIN DRO	RARF	ARTEST123	4 X 14.50	CC		781	PEERLESS	06/16/15			0.01	1.00	

Figure Not Costed Items Browse screen

When costing multiple invoices and the system Option [Supplier From Supplier File Only \(Products, Inventory And Purchase Orders\)](#) is set to Yes, F7 can be used to populate the Supplier field with the previous value used after the first costing has been completed. This will also carry forward the previous terms and discount rates.

# Find Screen

The ability to search by Dye/Run Lot has been added to the Roll and Item Inventory Find screens.

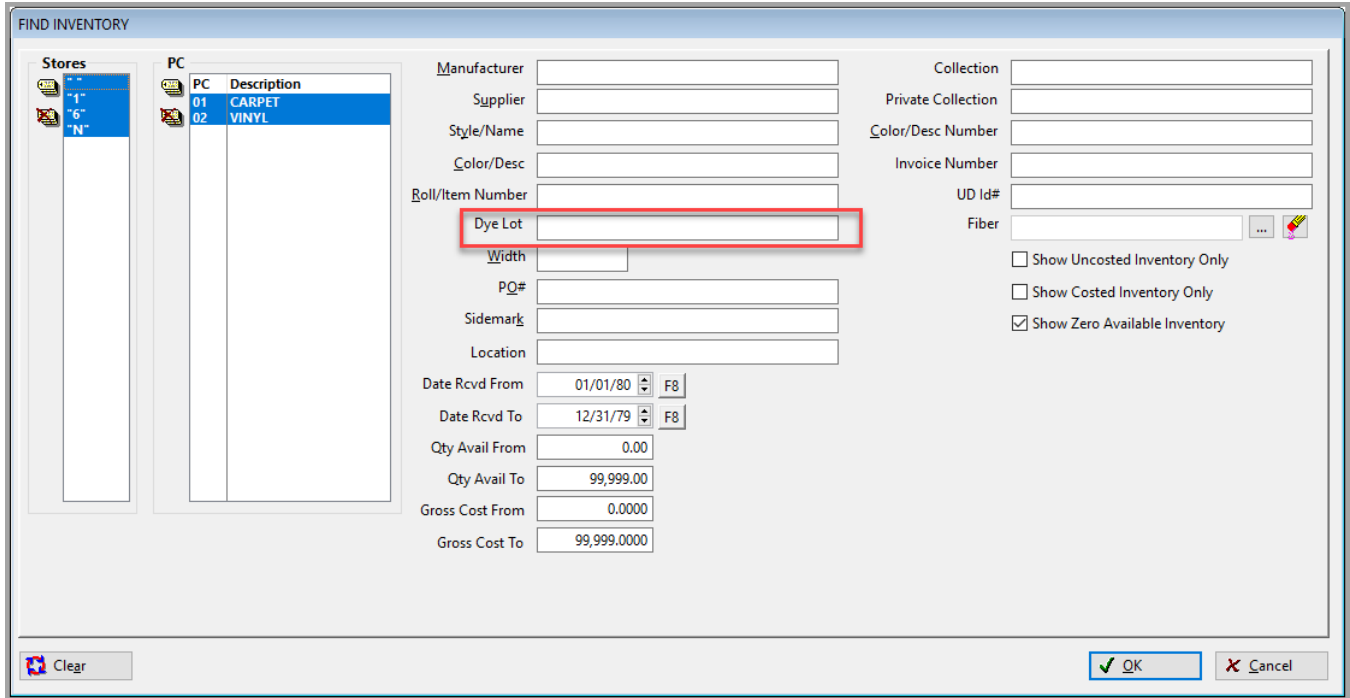


Figure Roll Inventory Find screen

# Price Calculator

The Load has been added to the Price Calculator

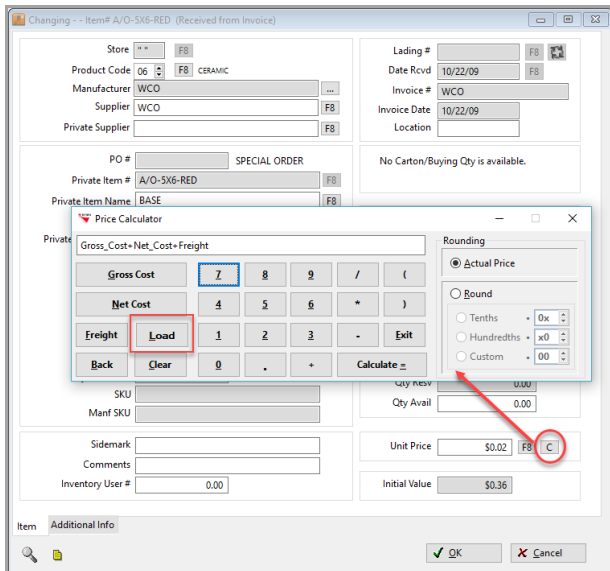


Figure Price Calculator from Item Inventory

# Roll Inventory

## Browse Screen

The ability to sort by Available (Avail), Date Received (Received), and Invoice Date (Inv Date) has been added to the Roll Inventory Browse screen.

SC	PC	Roll #	Used	Rsvd	SR Rsv	Avail	PO #	SKU	Location	Gross Cost	Net Cost	Freight	Sell Price	Quality	Received	Private Supplier	Sidemark	Invoice #	Inv Date	Style #
**	01	CG6026900001	15.00	0.00	0.00	0.00	CG6026900001			2.5000	2.5000	0.0000	10.00		07/15/16	DOC U. MENT	MENT, DOC U.	HORSET	07/15/16	369852
**	01	ST0000010003	ON ORDER	10.00	0.00	0.00	ST0000010003			1.0000	1.0000	0.0000	11.00			DOC U. MENT	ST000001			369852
**	01	WICKED	0.00	0.00	0.00	200.00	#ST087590001			6.9300	6.9300	0.0000	0.00		05/13/16	CARPETS PLUS		TESTING	05/13/16	7D391

Figure Roll Inventory Browse Screen

# Item Inventory

## Browse Screen

The ability to sort by Available, Date Received (Date Rcvd), Invoice Date has been added to the Item Inventory Browse screen.

SC	PC	Private Item #	Seq #	Private Name	Private Description	Run Lot	Price	Qty Rcvd	Used	Reserved	Soft Rsv	Available	Lading #	PO #	UD Id#	SKU	Marf SKU	Width	Length	Date Rcvd	Invoice Date	Invoice #
*1	06	OS123	1	TELL ME A STORY	FAIRY BLUE		\$0.00	250.00	500.00	-249.00	0.00	-1.00	BL3208040001	CG6027360001				0	0	05/17/17	05/17/17	COMB
**	06	OS123	2	TELL ME A STORY	GLASS SLIPPER		\$0.00	5.00	ON ORDER	5.00	0.00	0.00		CG7041320002				0	0			
**	06	OS123	3	TELL ME A STORY	RED RIDING HOOD		\$0.00	15.00	15.00	0.00	0.00	0.00	BL3208150001	CG7041230001				0	0	06/13/17	06/13/17	TESTING
**	06	OS123	4	TELL ME A STORY	PORRIAGE TAN		\$100.00	10.00	10.00	0.00	0.00	0.00	BL3208370001	ST0000050001				0	0	08/30/17		
**	06	OS123	5	TELL ME A STORY	PUMPKIN		\$0.00	25.00	ON ORDER	25.00	0.00	0.00		CG7041130001				0	0			
**	06	OS123	6	TELL ME A STORY	PUMPKIN		\$0.00	50.00	50.00	0.00	0.00	0.00		CG7041130001				0	0	08/30/17	08/30/17	SPLIT R.
**	06	OS123	7	TELL ME A STORY	PUMPKIN		\$0.00	25.00	25.00	0.00	0.00	0.00		CG7041130001				0	0	08/30/17	08/30/17	SPLIT R.

Figure Item Inventory Browse Screen

# History

The History screen now displays the Remarks field. In the remarks field, information from consolidation will be displayed. It will include the TO and FROM system reference numbers along with the date the consolidation was performed.

Item #	Seq #	Trans Date	Avail	Current Value	Remarks
12345	4	01/08/16	40.00	4,000.00	NEW ITEM PO TRUCK:CG502142
12345	4	01/08/16	0.00	0.00	SOLD PO TRUCK
12345	4	01/08/16	0.00	0.00	COSTED
12345	4	01/08/16	40.00	4,000.00	CONSOLIDATE FROM 3 ON 20160108
12345	4	01/08/16	0.00	0.00	BATCH MOVE INVENTORY TRANSFER ADJUSTMENT
12345	4	03/03/16	39.00	3,900.00	
12345	4	03/17/16	29.00	2,900.00	
12345	4	08/10/16	19.00	1,900.00	
12345	4	08/10/16	29.00	2,900.00	
12345	4	08/19/16	19.00	1,900.00	

Figure History screen for an item

# Inventory Move

## Received Moved Inventory

The ability to add the Estimated Transfer Date and the Truck Number has been added with the Edit Note button.

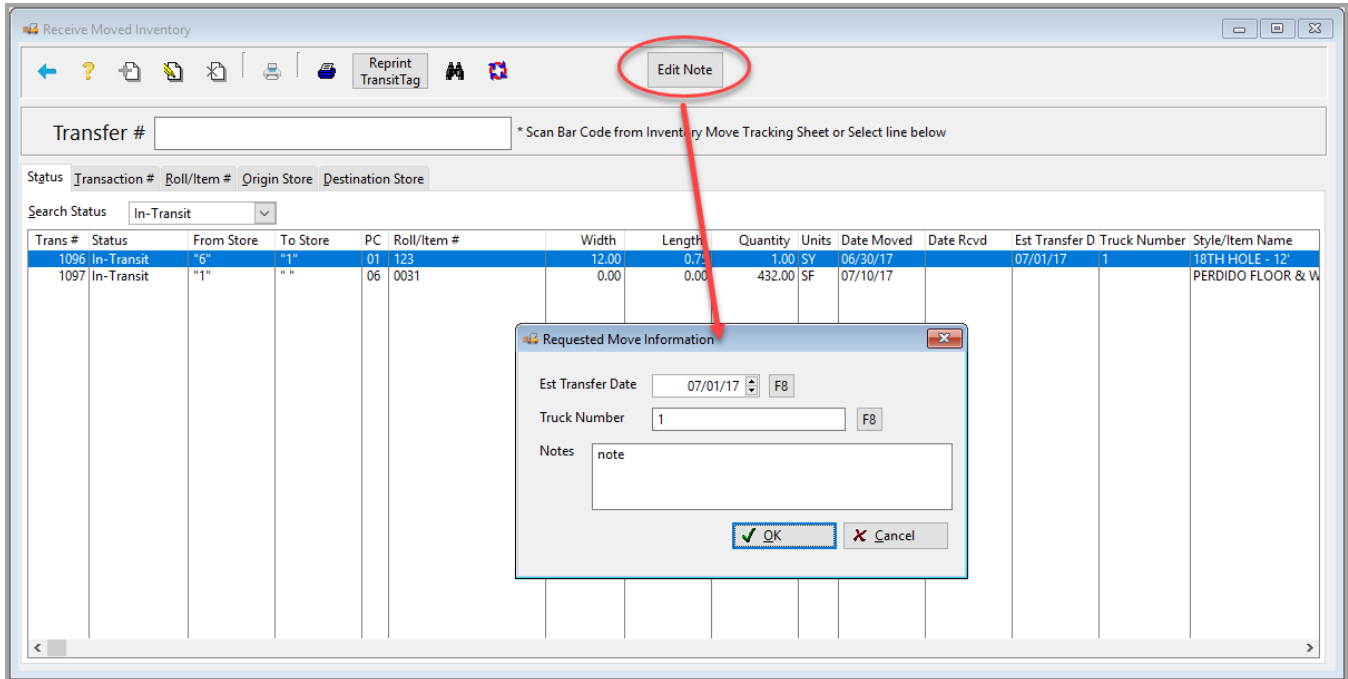


Figure Receive Moved Inventory screen

## Inventory Move Summary Report

The shipping weight has been added to the Summary Report.

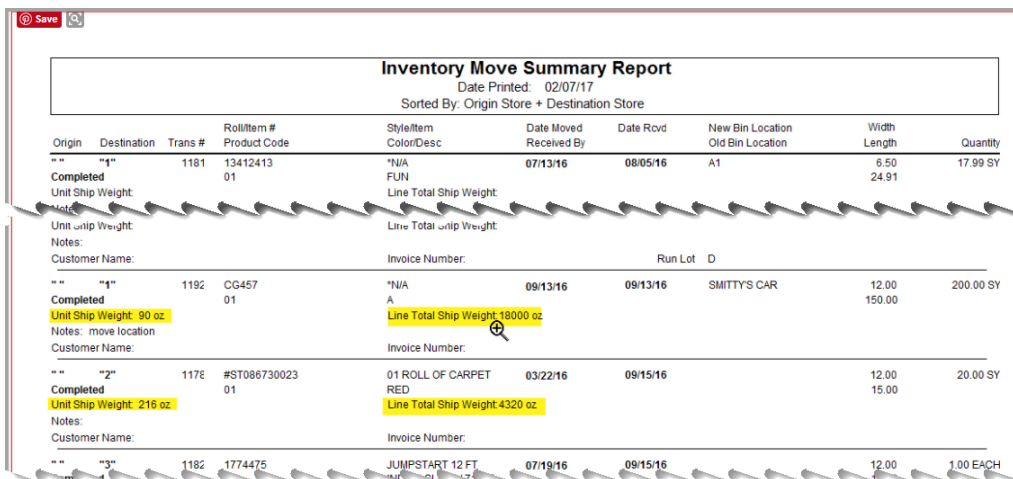


Figure Inventory Move Summary Report preview

# Reports

## Purchase Order Summary Report

*Reports > Purchase Order Summary Report*

If satisfied or cancelled PO's are included while printing the PO Summary report, they will be marked on the report.

DATE 07/06/17

### PURCHASE ORDER SUMMARY REPORT

ACCOUNT NUMBER

<b>From</b> DOCUMENTATION COMPANY 112 MAIN ST ANYWHERE, USA 55555 Tel: 205-349-2233 / Fax: 205-349-3393	<b>Builder</b> Builder Information Not Available
<b>Ship To</b> DOCUMENTATION COMPANY 112 MAIN ST ANYWHERE, USA 55555 Tel: 205-349-2233 / Fax: 205-349-3393	<b>Supplier</b> TEST 123 TEST TEST, AL 12345

SUMMARY

Order Date	Product Code	Item Number	Style / Item Color / Description	Roll/Cut	Amount Ordered	Units	Quoted Unit Price	Promise Date
12/22/15	06	123456	BLOGGING	----	50.00	EA	\$150.0000	12/22/15
PO #: #ST08730-0001			CRIMSON WIN					

Taken By: SABRINA  
 Sidemark:

Desc#: 456  
 Comments:

**\*\*Cancelled\*\***

PO Req Del Date:  
 PO Req Ship Date:

Figure Purchase Order Summary Report



Notes:

This status does not appear on the Condensed version.

## Roll History Report

*Reports > Roll History Report*

The ability to select Product Codes have been added to the report screen.

Roll History Report...
✖

**Stores**

- 11
- 16
- N

Combined

Filter by Roll Number  
 Roll Number From:   
 Roll Number To:

Filter by Delivery Date  
 Delivery Date From:  F8  
 Delivery Date To:  F8

Filter by Roll Details  
 Manufacturer:  F8  
 Style:   
 Color:

Filter by Transaction Type  
 Trans Type:   
 Adjustment Type:

**Sort Options**

Roll Number

Style/Color

Manufacturer/Style/Color

**Print Options**

Print Preview  Remove In and Out Lines

Output CSV To:

Prints on 8.5 x 14 Paper (Legal)

PC	Description
01	CARPET
02	VINYL

Figure Roll History Report screen

## Item History Report

*Reports>Item History Report*

The ability to select Product Codes have been added to the report screens.

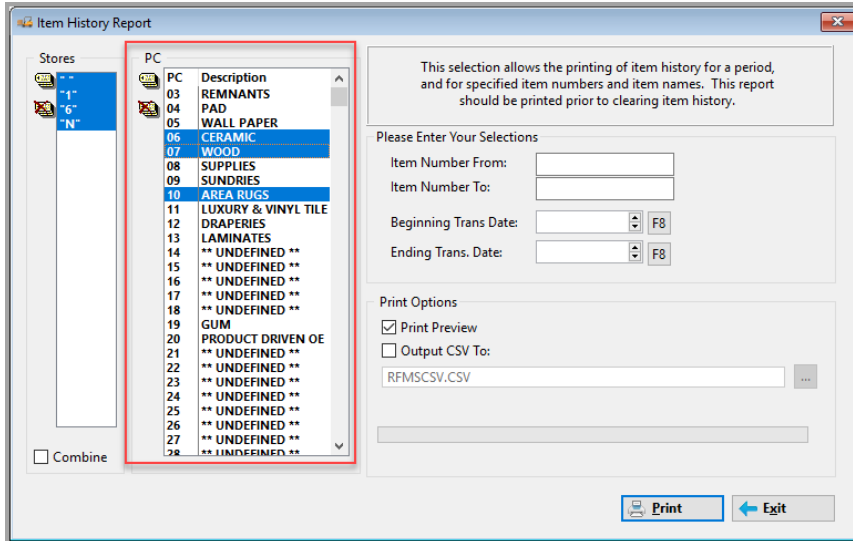


Figure Item History Report screen

## Item Inventory Information Report

*Reports>Item Inventory Information Report*

A filter for Costed, Not Costed, and Both has been added to the report.

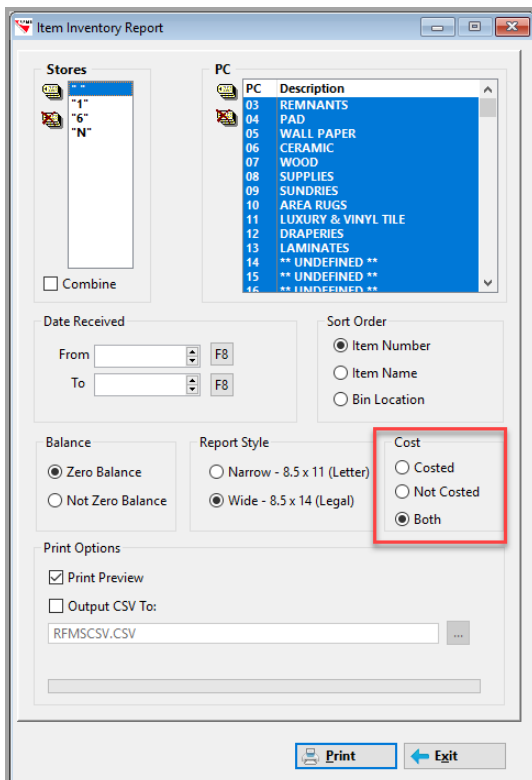


Figure Item Inventory Information Report screen

## Roll Inventory Physical Report and Item Inventory Physical Report

*Reports>Roll Inventory Physical Report or Reports>Item Inventory Physical Report*

A Location range filter has been added to the Roll Inventory Physical Report screen.

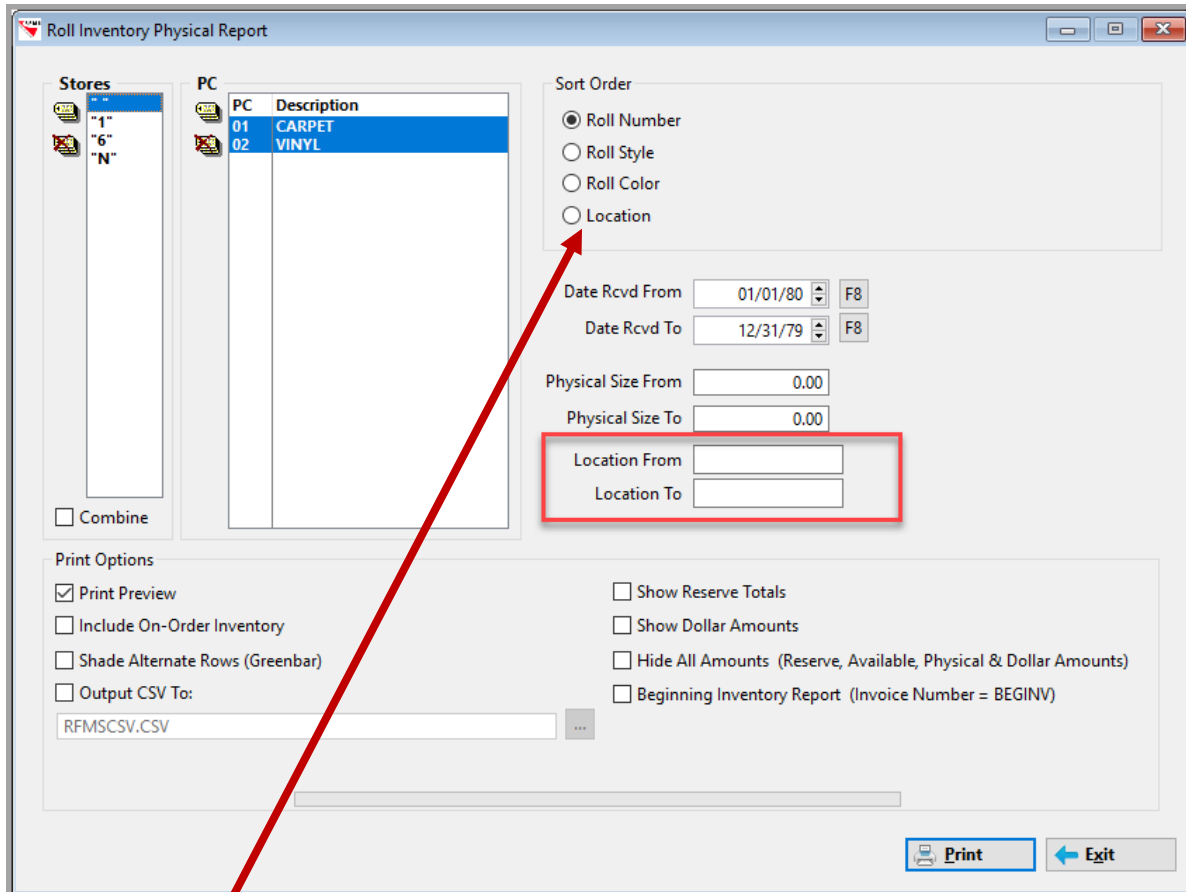


Figure Roll Inventory Physical Report screen

When Location is selected as the sort order, the report will be sorted by Store, Location, and then Roll Number.

## Item Inventory Physical Report

*Reports>Item Inventory Physical Report*

The Carton Qty, Item Length, and Item Width have been added to the CSV file.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	
Store	Product C	Item Num	Name	Description	Location	Reserve	Available	Pr Code	Date Rcvd	Phy Amt	Units	Gross Cos	Run Lot	Sidemark	Collector	Price	Codi	Fiber	Construct	Country	Carton Qty	Item Leng	Item Width
" "	3	0044A-8X1	LUXOR-8X	0044A-BLACK		0	-9.75	3	20141210	-9.75	EA	380									0		
" "	3	24221690C	PERGOLA-BELL	VINE		0	1	3	20110301	1	EACH	257									0	9.5	6.92
" "	3	24221690C	PERGOLA-BELL	VINE		0	1	3	20110816	1	EA	50									0	7	2
" "	3	24221690C	PERGOLA-BELL	VINE		0	1	3	20120817	1	EA	25									0	9	2.5
" "	3	24221690C	PERGOLA-BELL	VINE		0	1	3	20120817	1	EA	20									0	9.5	2
" "	3	2589	PATRIOT F	ONCE AND ALWAYS		0	50	3	20160513	50	EA	50									0	0	0
" "	3	3543-8X11	ESTATES-S	350		0	1	3	20050314	1	EA	299		STOCK							0	10.83	7.83
" "	3	3Q120-00C	GRAND SL	BLACK-00660		0	1	3	20110819	1	EA	45		STOCK							0	0	0

Figure Item Inventory Physical Report CSV file

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## Utilities

### Fix Inventory

*Utilities > Fix Inventory*

#### Fix Soft Reserve

This option will remove Soft Reserves that will not clear using the regular method on the Soft Reserve window.

#### Requirements

- Rolls - Product Code and Roll Number
- Items - Product Code, Item Number, and Item Sequence Number

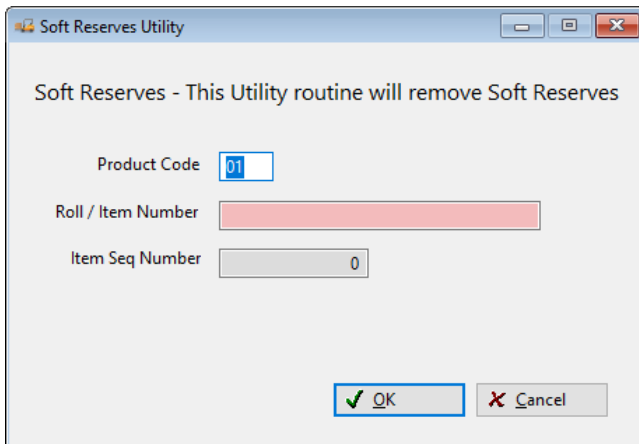


Figure Soft Reserves Utility screen

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## Products

### Browse Screens

The ability to sort by Roll Cost, Cut Cost, Item Cost, Trans Date, Input Date, and Cancel/Inactive Date has been added.

# Merge Product

A Find option has been added to the Merge Product screen

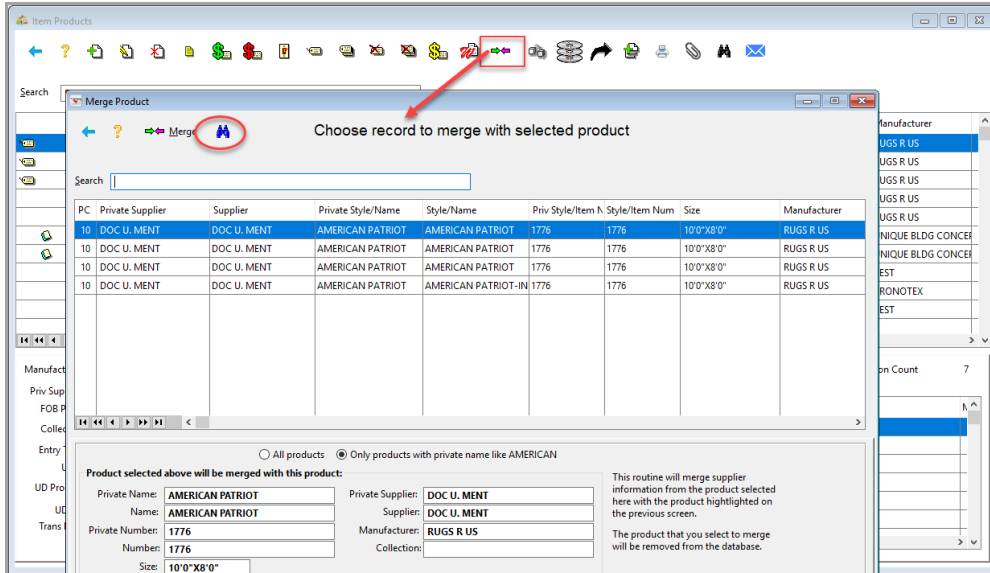


Figure Merge Product screen

# Find Screen

The F8 button has been added to the EC Account # filter on the Find screen.

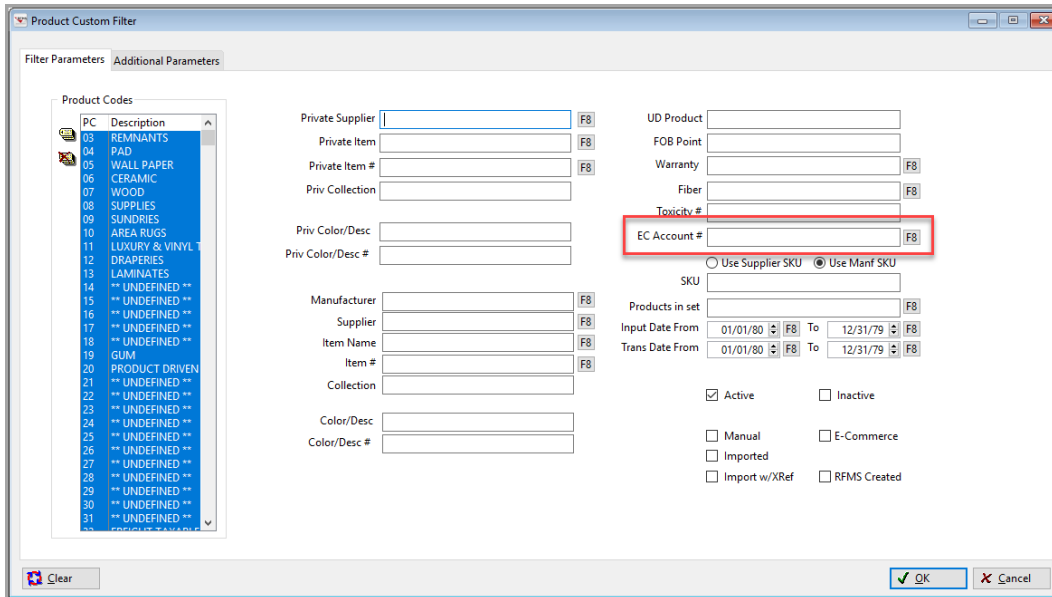


Figure Find screen

The ability to filter by Measure Products has been added to the Additional Parameters tab on the Find screen.

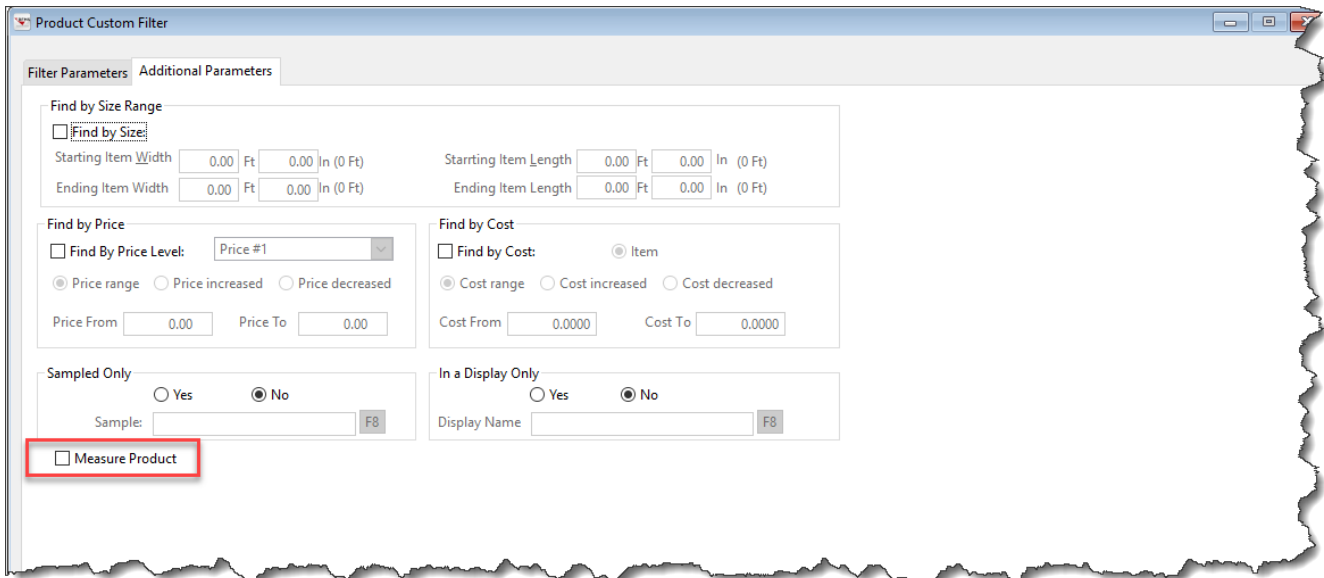
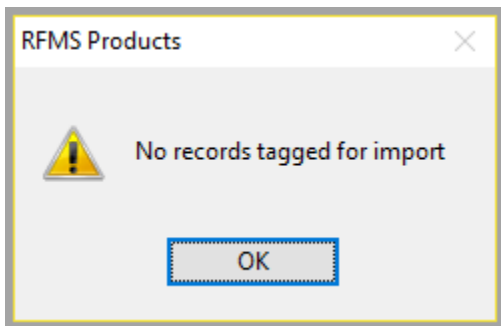


Figure Additional Parameters Tab on the Find screen

---

## Colors

When importing colors from another record, a message has been added to remind the user that nothing has been tagged to import over.



# Price Range Edit

File>Price Range Edit

The criteria to use Product Sets in Price Range Edit has been added.

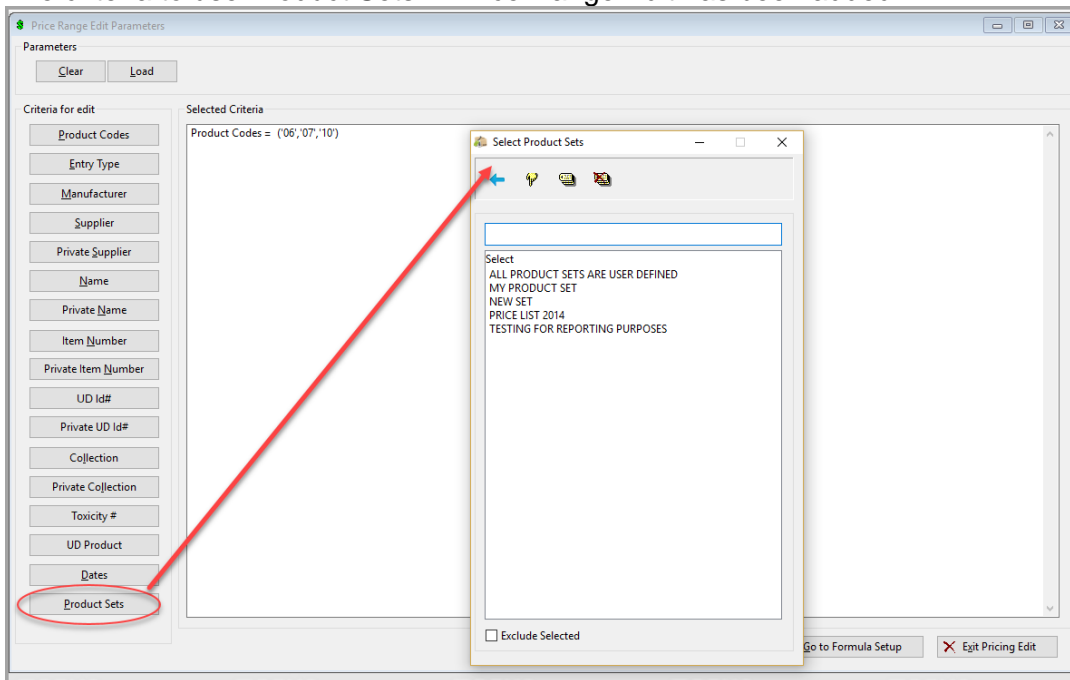


Figure Price Range Edit screen

A Save Do Not Run button has been added to the Price Range Edit Formula Setup screen. This allows the user to set up a parameter list and run it at a later date.

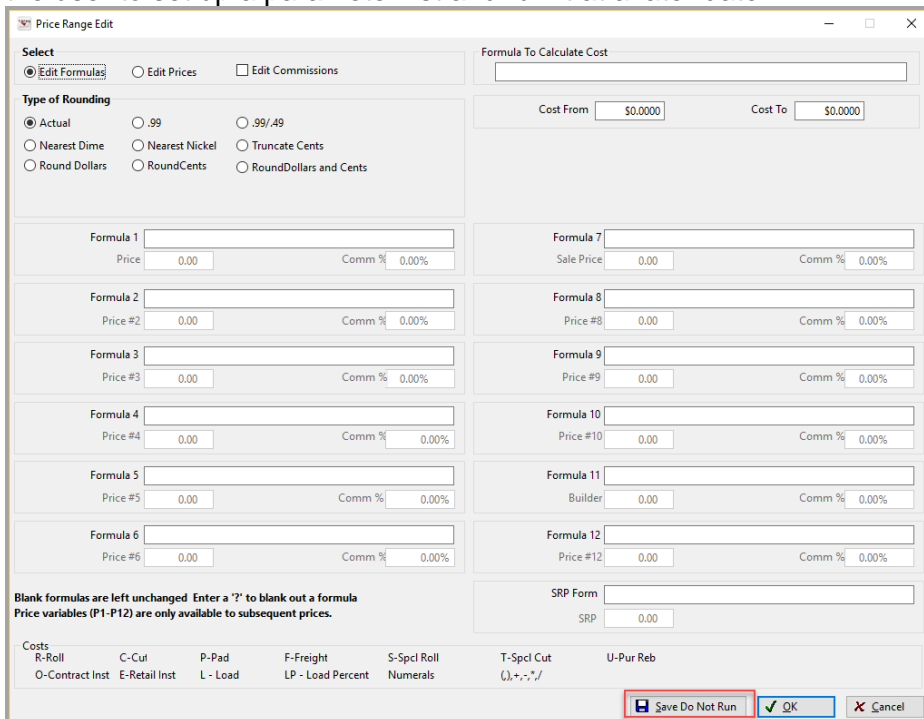


Figure Price Range Edit Formula Setup screen

## Range Delete

The Range Delete function has been combined and enhanced. Click [here](#) for a more detailed document on the changes.

## Input Multiple Item Products

The Extended Information 2 tab now comes over on the new records when using Input Multiple Item Products.

## Reports

### Color List Report

*Reports > Color List Report*

The Color List Report filter now uses the Find screen to set the parameters.

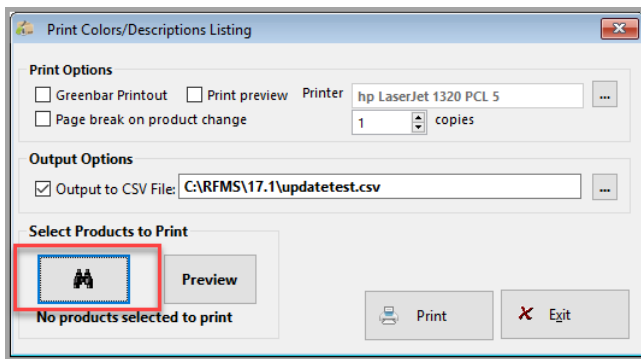


Figure Color List Report screen

### Cost List Report

*Reports > Cost List Report*

Sp Roll, Sp Cut, and Sp Item have been added to the Cost to print list on the Cost List Report

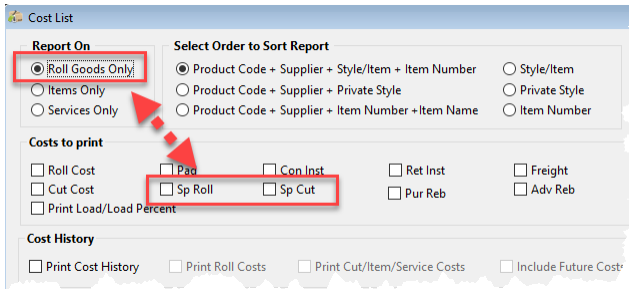


Figure Cost List-Roll

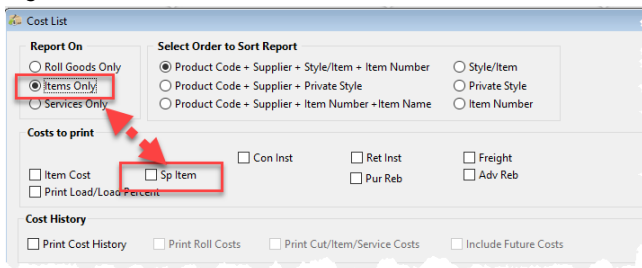


Figure Cost List-Items

The Unit of Measure has been added to the Cost List Report.

Sort Order: Product Code + Supplier + Style/Item + Item Number

07/27/17 2:52:27PM

**DOCUMENTATION-MENUS & REPORTS**  
Cost List - Items

---

Product Code: 03 ( Supplier: AMSAN )	Size: 8'0"X10'0" EA	UD Id#
Product Code: 03 ( Supplier: CAPEL )	Size: 0'0"X0'0" SF	UD Id#
	Size: 7'9.96"X10'9.96" EA	UD Id#
	Size: 8'6"X11'6" EA	UD Id#
Product Code: 03 ( Supplier: CARPET ONE )	Size: 8'0"X11'0" EA	UD Id#

Figure Cost List Report preview

The ability to output to a CSV file has been added.

Source has been added to the CSV file

A	B	C	D	E	V	W	X	Y
ProdCode	Supplier	ItemName	ItemNum	PrivItemN	Suppl Manufact	UD Id#	Source	
6		CERAMIC TILE S-131 DAL	TILE DC		Suppl Manf		RFMS Created	
6	1099	SUPP BLOGGING			Suppl Manf		RFMS Created	
6	A&A	GLOE BELLA LUNA CUBIC	LINER		Suppl Manf		MANUAL	
6	A&A	GLOE BELLA LUNA CUBIC	MOLDING		Suppl Manf		MANUAL	
6	A&A	GLOE BELLA LUNA HF			Suppl Manf		MANUAL	
6	A&A	GLOE BELLA LUNA HF			Suppl Manf		MANUAL	
6	A&A	GLOE BELLA LUNA HF			Suppl Manf		MANUAL	
6	A&A	GLOE BELLA LUNA HF			Suppl Manf		MANUAL	
6	A&A	GLOE BELLA LUNA TRAVERTINE	HF		Suppl Manf		MANUAL	
6	A&A	GLOE BELLA LUNA TRAVERTINE	HF		Suppl Manf		MANUAL	
6	A&A	GLOE BELLA LUNA TRAVERTINE	HF		Suppl Manf		MANUAL	
6	A&A	GLOE BELLA LUNA TRAVERTINE	HF		Suppl Manf		MANUAL	
6	A&A	GLOE BELLA LUNA VERSAILLES	PATTE		Suppl Manf		MANUAL	
6	A&A	GLOE CASA BIANCA BASE	MOLDING		Suppl Manf		MANUAL	

Figure Cost List CSV file

## Promotional Cost Expiration Report

*Reports>Promo Cost Report*

The ability to print to CSV has been added.

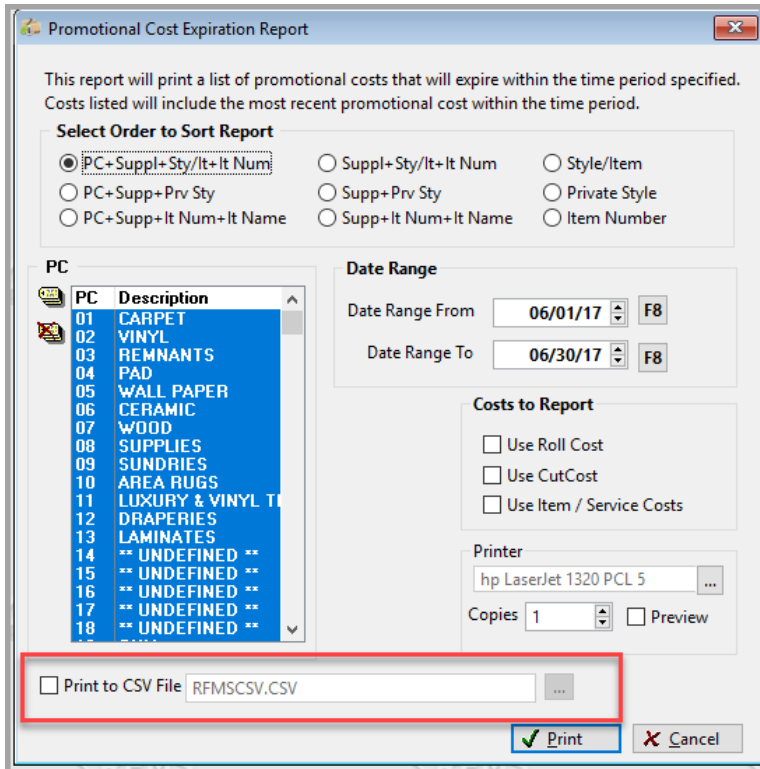


Figure Promotional Cost Expiration Report screen

## Inactive Products

*Report>Inactive Products*

The last CSV File location used for the report will now be visible upon entering the window.

## Export Product Info

*Report>Export Product Info*

The Sort option has been removed because the information is going to a .csv file which can be sorted.

*Reports>Export Product Info>Set Export Options*

Sample Type has been added to the Export Options.

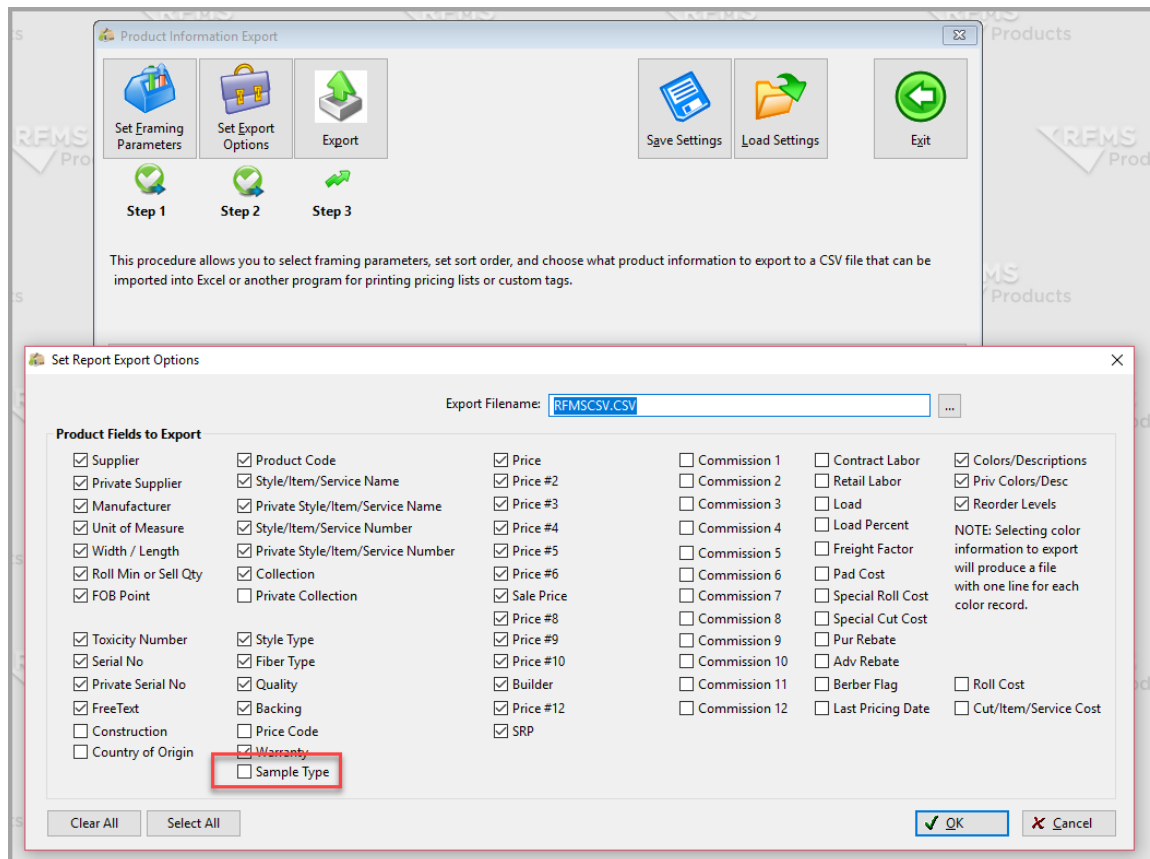


Figure Set Report Export Options screen

# Utilities

## Product Templates

*Utilities>Product Templates*

The ability to search using the [RFMS Smart Search](#) feature on the Product Selector screen has been added.

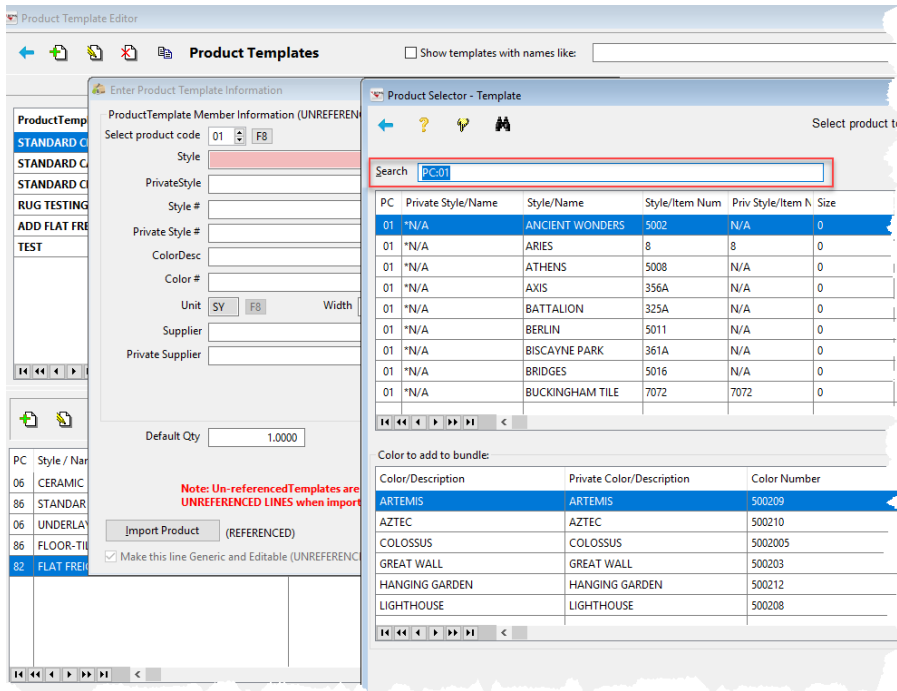


Figure Product Templates

## Product Sets

*Utilities>Product Sets*

The Product Sets filters have been enhanced to a Range Find screen so that it is easier to search and select.

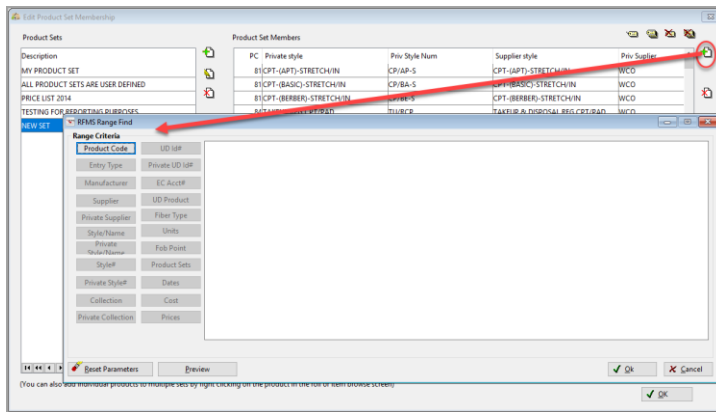


Figure Product Sets Range Find screen

# Accounting

## Accounts Receivable

### Statements

*File>Accounts Receivable>Statements*

The name printed on the statements now follows the [Invoice Name Print Order](#) System Option. The Statements will still print out in Last Name order.

### Aging Report

*File>Accounts Receivable>Aging Report*

The ability to Save and Load filters have been added to the A/R Aging screen.

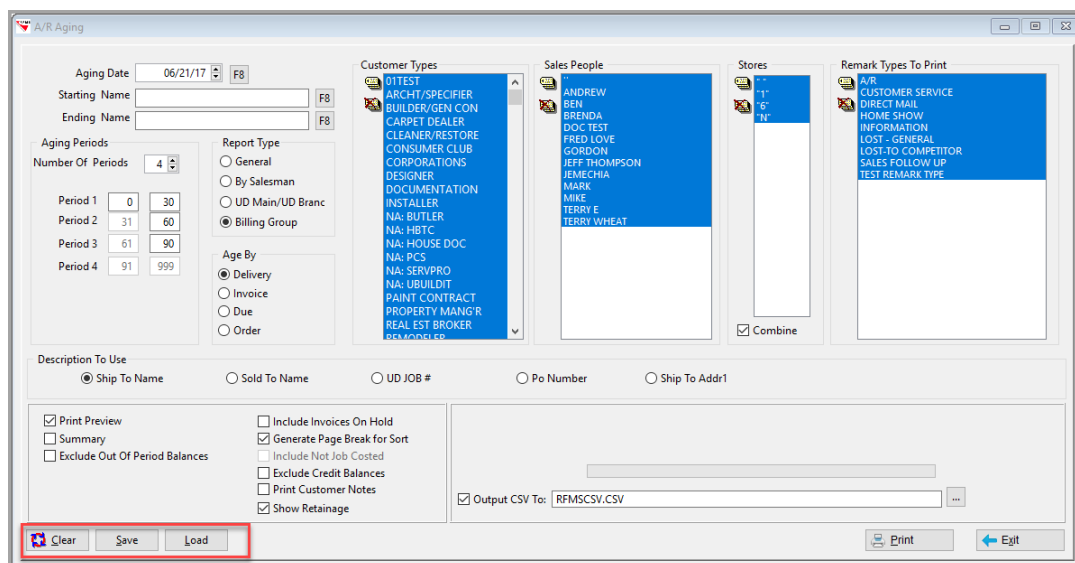


Figure A/R Aging screen

The ability to save filter now allows a scheduled task to be created. Your IT will be responsible for setting this up.

# Accounts Payable

## Add/Edit Payables

*File>Accounts Payables>Add/Edit Payables*

The Purchase Order number has been added to the Inventory on Payable screen.

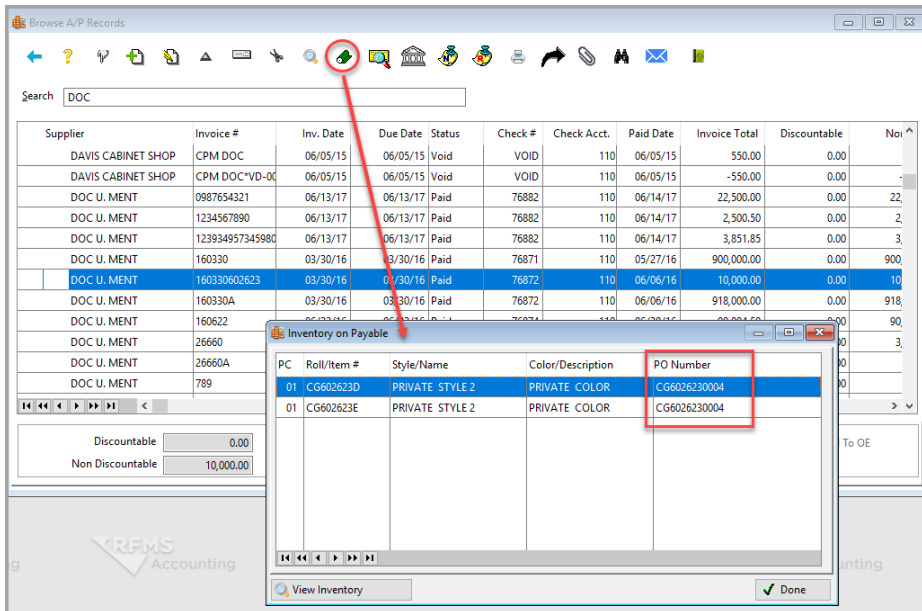


Figure Browse AP screen

## Check Writing

### Payable by Suppliers

*File>Accounts Payable>Check Writing>Payable By Suppliers*

The ability to send to a CSV has been added.

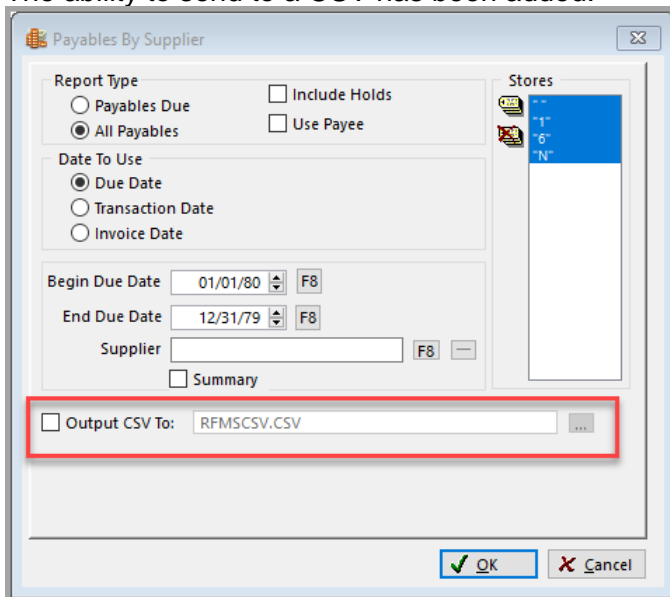
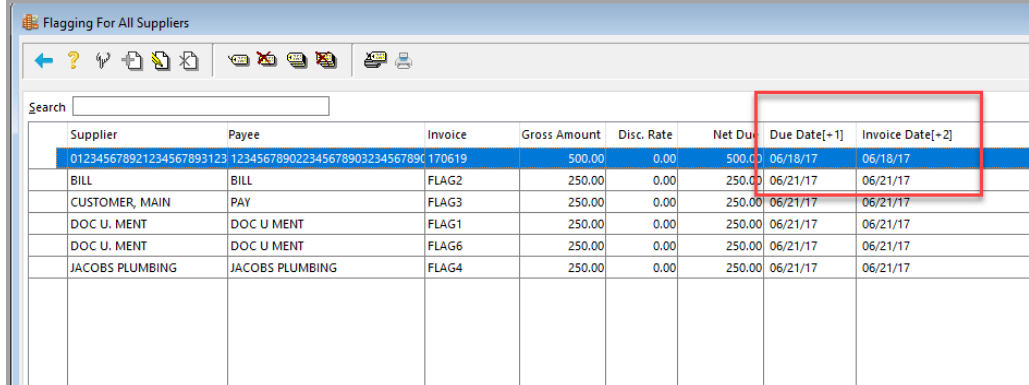


Figure Payables By Supplier screen

## Flag Payables

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

The ability to sort by Due Date and Invoice Date has been added to the Flagging screen.

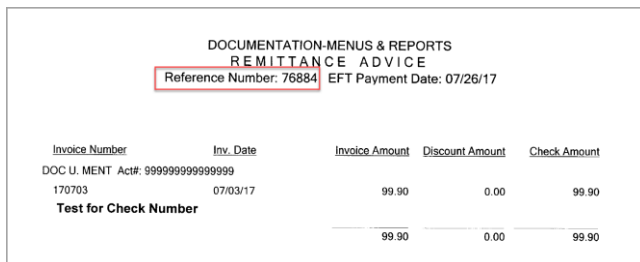


Supplier	Payee	Invoice	Gross Amount	Disc. Rate	Net Du	Due Date[+1]	Invoice Date[-2]
012345678921234567893123	123456789022345678903234567890	170619	500.00	0.00	500.00	06/18/17	06/18/17
BILL	BILL	FLAG2	250.00	0.00	250.00	06/21/17	06/21/17
CUSTOMER, MAIN	PAY	FLAG3	250.00	0.00	250.00	06/21/17	06/21/17
DOC U. MENT	DOC U MENT	FLAG1	250.00	0.00	250.00	06/21/17	06/21/17
DOC U. MENT	DOC U MENT	FLAG6	250.00	0.00	250.00	06/21/17	06/21/17
JACOBS PLUMBING	JACOBS PLUMBING	FLAG4	250.00	0.00	250.00	06/21/17	06/21/17

Figure Flagging screen

## EFT Remittance

The Check number is printed as a reference number on the Remittance.



DOCUMENTATION-MENUS & REPORTS  
REMITTANCE ADVICE  
Reference Number: 76884 EFT Payment Date: 07/26/17


Invoice Number	Inv. Date	Invoice Amount	Discount Amount	Check Amount
DOC U. MENT Act#: 999999999999999				
170703	07/03/17	99.90	0.00	99.90
<b>Test for Check Number</b>				
		99.90	0.00	99.90

Figure Remittance Advice preview

## General Ledger

### View Journal

*File>General Ledger>View Journal*

The ability to import journal entries from a CSV has been added. Clicking the import icon  brings up the Import Journal screen. There is an ability to create an empty file so that the layout of the CSV can be viewed.

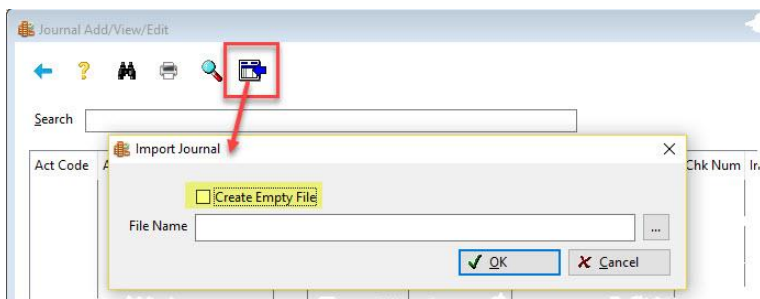


Figure Import Journal screen

## General Ledger Functions

*File>General Ledger>General Ledger Functions*

### Statement of Income

The ability to clear, save and load filters has been added to the Statement of Income Report.

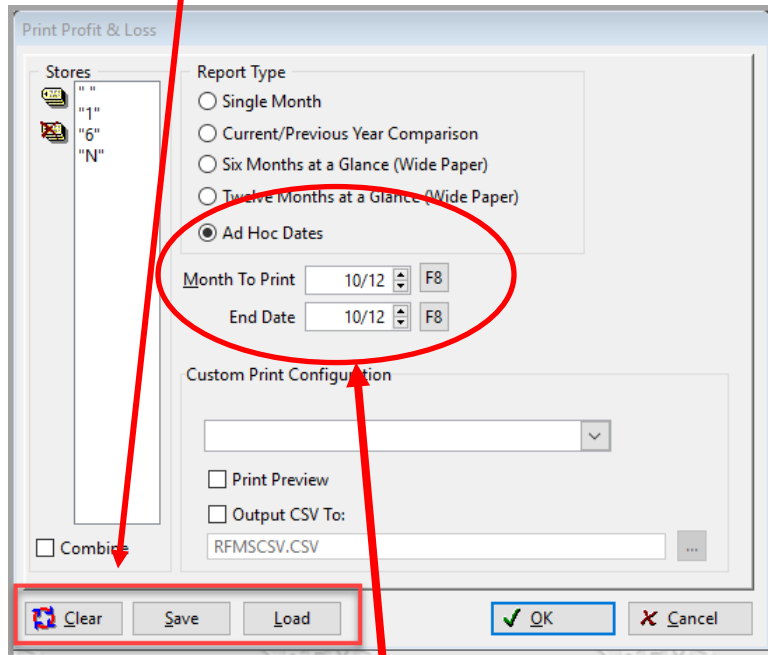


Figure Statement of Income screen

The Ability to print from a custom date range has been added. Select Ad Hoc Dates and put in the Date Range.

---

## Banking

### Reconcile Register

*File>Banking>Reconcile Register*

If using OFX file from financial institution, a report is generated for the matched and unmatched items.

# Month End

## Month End Inventory Balance Report

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

The Location has been added to the CSV file.

A	B	C	D	E	F	V	W	X	Y	Z
Descripti	Store	Sort 3	Supplier	Style / Ite	Color /	Grs Value	Product C	Item Syst	PO Numb	Location
Roll Inven	"1"	1	SUPPLIER	*PRIVATE	NEW COL	423.001	1	0	CG704102	A
Roll Inven	"1"	1	SUPPLIER	*PRIVATE	NEW COL	419.895	1	0	CG704102	B
Roll Inven	"1"	1	SUPPLIER	*PRIVATE	NEW COL	419.999	1	0	CG704102	C
Roll Inven	"1"	1	SUPPLIER	*PRIVATE	NEW COL	419.999	1	0	CG704102	B
Roll Inven	"1"	1	SUPPLIER	*PRIVATE	NEW COL	210.0011	1	0	CG704102	B
Roll Inven	"1"	1	SUPPLIER	*PRIVATE	NEW CO	21000	1	0	CG704102	C
Roll Inven	"1"	1	SUPPLIER	*PRIVATE	NEW COL	-21000	1	0	CG704102	B
Roll Inven	"1"	1	SHAW INC	18TH HOL	AUTUMN	601.625	1	0	#ST086550001	
Roll Inven	"1"	1	SHAW INC	18TH HOL	AUTUMN	355.1723	1	0	#ST086660001	
Roll Inven	"1"	1	SHAW INC	18TH HOL	AUTUMN	1596.461	1	0	CG5020930002	

Figure Month End Inventory Balance Report CSV

## Month End Tax Report (17.1.3)

The Ship\_City, Ship\_Country, and Ship\_State have been added to the csv file.

A	B	C	D	E	F	G	H	S	T	U	V	W	X	Y
Report Ty	Store	Break1	Break2	Break3	Invoice	Order Dat	Del Date	seTax	NonTaxAr	Sold Zip	Ship Zip	Ship_City	Ship_Country	Ship_State
PROPOSEI	Combinec	State:	County:	City:	CG001813	20100414	20160811	0	0	35476				
PROPOSEI	Combinec	State:	County:	City:	CG202073	20120519	20150701	0	0					
PROPOSEI	Combinec	State:	County:	City:	CG202936	20120730	20150701	0	0	35402				
PROPOSEI	Combinec	State:	County:	City:	CG302514	20130509	20150701	0	0					
PROPOSEI	Combinec	State:	County:	City:	CG302517	20130509	20150701	0	0					
PROPOSEI	Combinec	State:	County:	City:	CG302648	20130716	20150701	0	0					
PROPOSEI	Combinec	State:	County:	City:	CG4 0018	20140218	20150701	0	0	36904				

# Human Resources

---

## Tax Information

The Maine Tax Table has been updated.

---

## Worker Information

[File>Worker Information](#)

A Subcontractor tab has been added for countries using GST. On the tab, there is a Subcontractor GST Calculation checkbox that defaults as unchecked. Checking the box means, GST automatically calculates and is added.

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

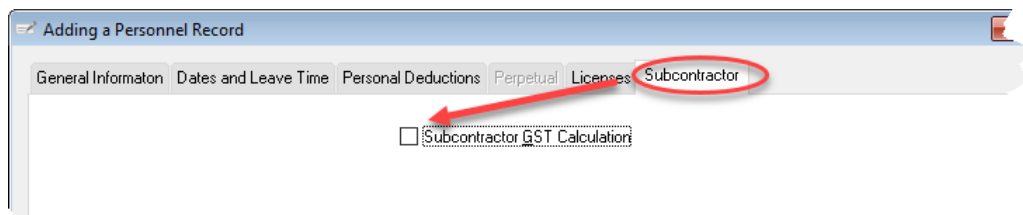


Figure Worker Information tabs

---

## Provider's Remittance

Provider's Remittance now includes "Ship To" name.

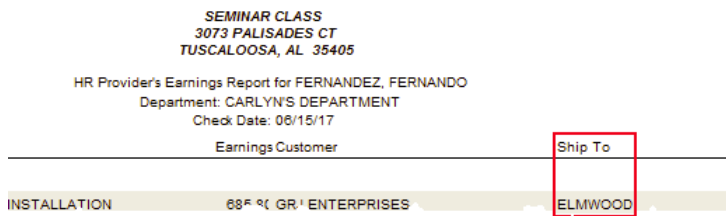


Figure Provider's Remittance preview

---

## Reports

### Worker Information

[Reports>Worker Information](#)

The License Information has been added to the CSV. These include Worker's License Information for Contractor's License, Specialty License, Self-Insurance and Worker's Comp.

AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL
User Date	Contractor's License	Contractor's Begin Date	Contractor's End Date	Specialty License	Specialty Begin Date	Specialty End Date	Self Insurance	Self Begin Date	Self End Date	Worker's Comp

## Taxable Payments Annual Reports (for GST)

*Reports > Taxable Payments Annual Reports*

This report has been added for GST Countries that currently include Australia, New Zealand and Canada.

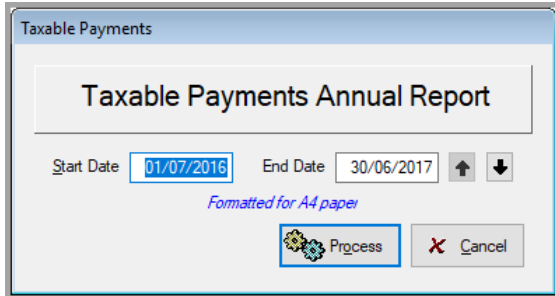


Figure Taxable Payments Annual Report screen

A warning message has been added letting a user know that the report will not proceed if the user has not provided both GST Account Code and GST Rate.

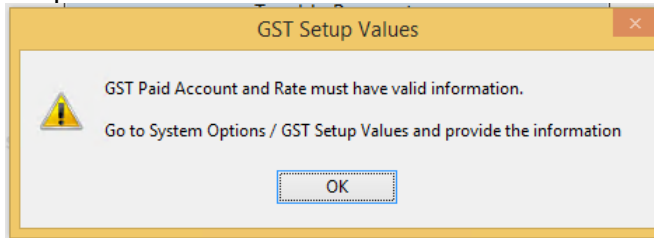


Figure GST Setup Values Warning Message

## Sales Reports

### Material Analysis

*File > Material Analysis*

The Measure Date has been added to the CSV.

RN	BO	BP	BQ	BR	BS	BT	BU	BV
.Nam	ShipAddr1	ShipAddr2	SoldCount	ShipCount	Sup_Colle	UOM	InvStore	&UD Date2 MD
			TUSCALOOSA			SF		
			TUSCALOOSA			SF		
			TUSCALOOSA			LF		
			TUSCALOOSA	TUSCALOOSA		EA	" "	
	123 COMMENT STREET		CHOCTAW	CHOCTAW		EA		
	123 COMMENT STREET		CHOCTAW	CHOCTAW		SV		

# Sales

## Open Orders

*File > Sales > Open Orders*

The Order Date has been added to the Report and the CSV.

DOCUMENTATION-MENUS & REPORTS  
OPEN ORDERS REPORT  
"" ( DOCUMENTATION COMPAN)

Page No: 1  
04/05/17  
10:16AM

From: 01/01/80 To: 12/31/79

PC Line	Salesperson	Customer	Style / Item	Color / Description	UD Date1	Roll / Item Number	Quantity	Units	Width	Length	Line Status
Inv Num: CG602726		Ship To Name: BAMBARGER, MR.									
Order Total: 1,307.67		Payment: 0.00		Balance: 1,307.67	%Paid: 0.00	Order Date: 08/16/16					
01	0001	DOC TEST	BAMBARGER, MR.	YELLOW BRICK ROAD 12	OZ		13.33	SY	12.00	10.00	GenPO

---

Inv Num:	Ship To Name:	Order Total:	Payment:	Balance:	%Paid:	UD Date1	Roll / Item Number	Quantity	Units	Width	Length	Line Status
CG502144	BITS N' BYTES BLOG	991.34	0.00	991.34	0.00	Order Date: 12/04/15						
06	0001	DOC TEST	BITS N' BYTES BLOG	BLOGGING	CRIMSON WIN	12/11/15	123456	5.00	EA	0.00	0.00	Open
06	0002	DOC TEST	BITS N' BYTES BLOG	GROUT NON-SANDED 10 POL	#100 WHITE	12/11/15	00015	1.00	EA	0.00	0.00	Open

A	B	C
Store	Order Date	Pr Code
" "	20160816	
" "	20151204	
" "	20151204	
" "	20151204	

The Install Store has been added to the CSV.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	
Store	Order Date	Pr Code	Invoice No	Line Num	Q	Balance	PercPaid	Transit Sta	Inventory	Install Store														
" "	20160816	1	CG602726	1	0	1307.67	0		DOCUMENT	" "														
" "	20151204	6	CG502144	1	0	991.34	0		DOCUMENT	" "														
" "	20151204	6	CG502144	2	0	991.34	0		DOCUMENT	" "														
" "	20151204	6	CG502144	3	0	991.34	0		DOCUMENT	" "														

# BidPro

## Find Screen

The ability to Save and Load filters has been added. For more information, click [here](#).

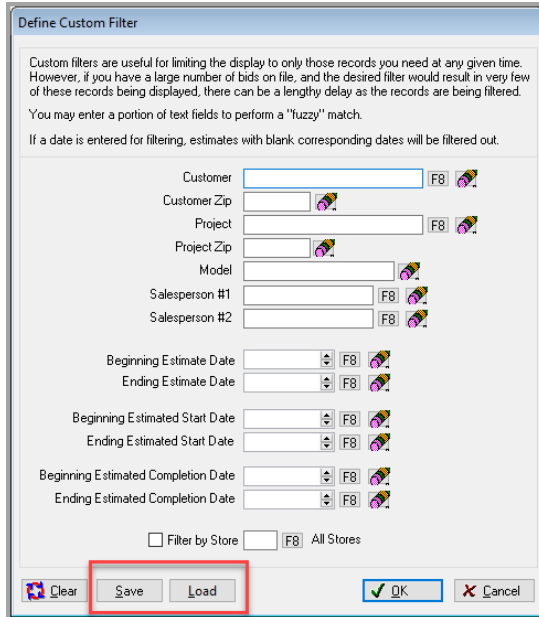


Figure Estimate Find screen

## Exporting Estimates

Exporting to a New Order / New Overage will not be allowed if PO Number is blank and is required for Orders / Overages. PO Number can be entered on Export screen and the option to save the entered PO Number back to the Estimate will be offered.

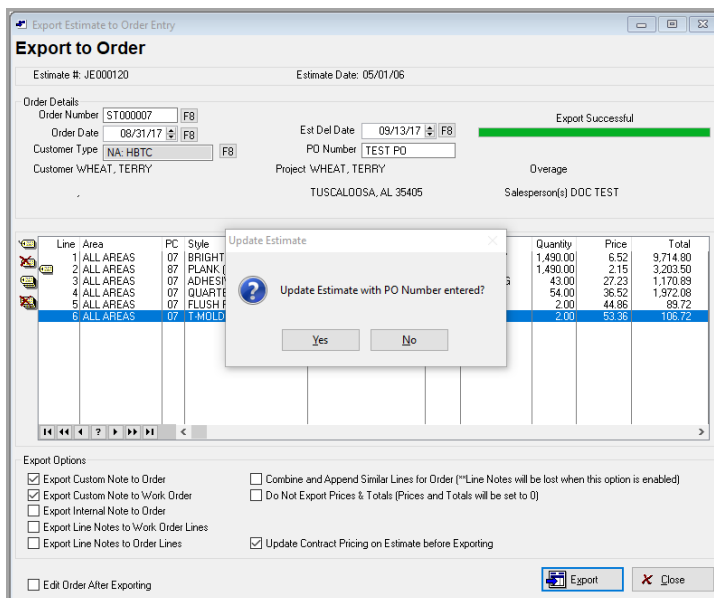


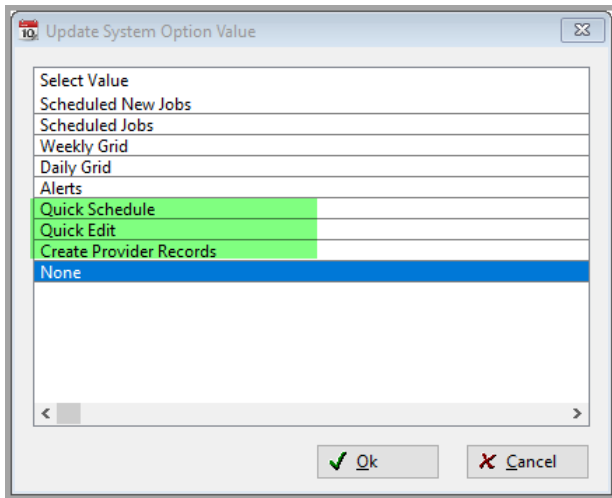
Figure Export to Order screen

# Schedule Pro

## System Options

### Screen to Display on Start Up

Quick Schedule, Quick Edit, and Create Provider Records have been added as values in this system option.



## Scheduled Jobs

### Email

Email in Scheduled Job screen now functions using Interoffice Mail, Email, and Email Using a Template.

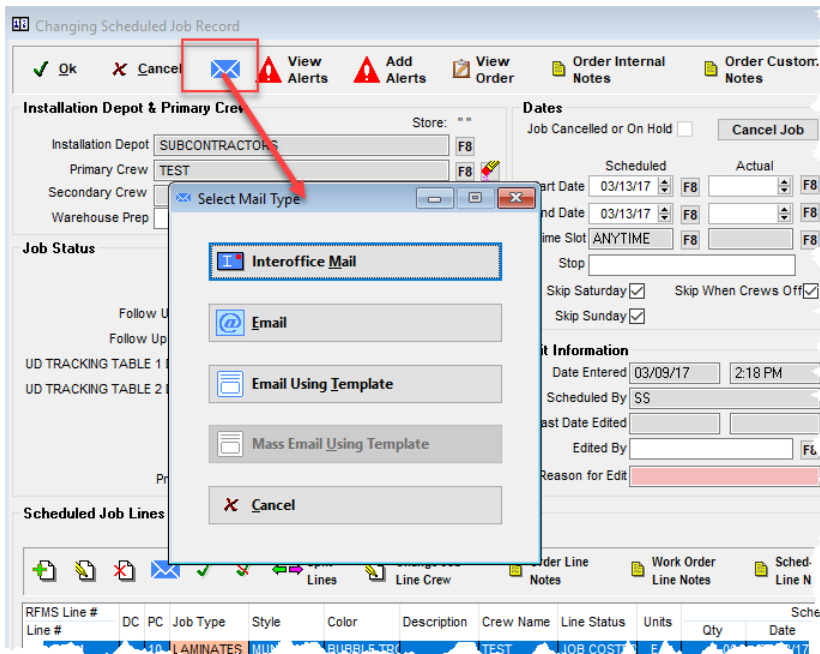


Figure Email on Scheduled Jobs screen

# Schedule New Jobs

The number of jobs scheduled for a depot that day are now displayed.

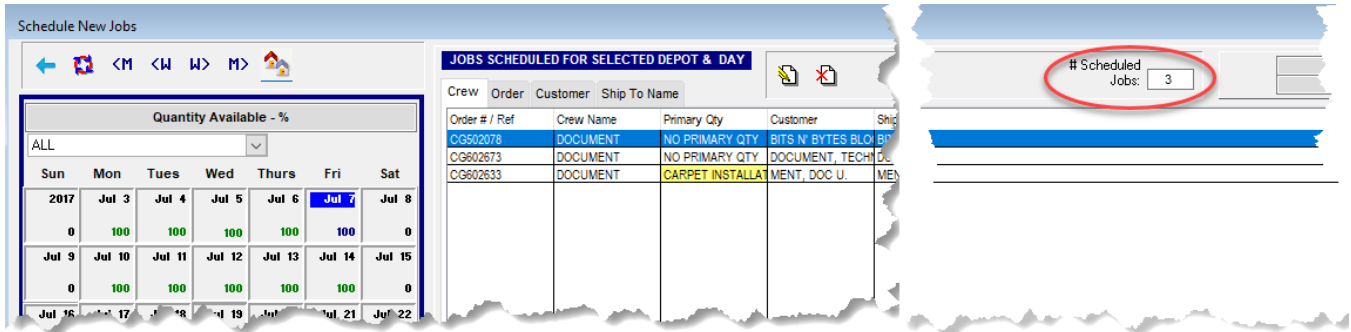


Figure Schedule New Jobs screen

# Quick Schedule

## Batch Schedule

The Order Entry "TO BE SCHEDULED" Altered Orders Only checkbox is now sticky.

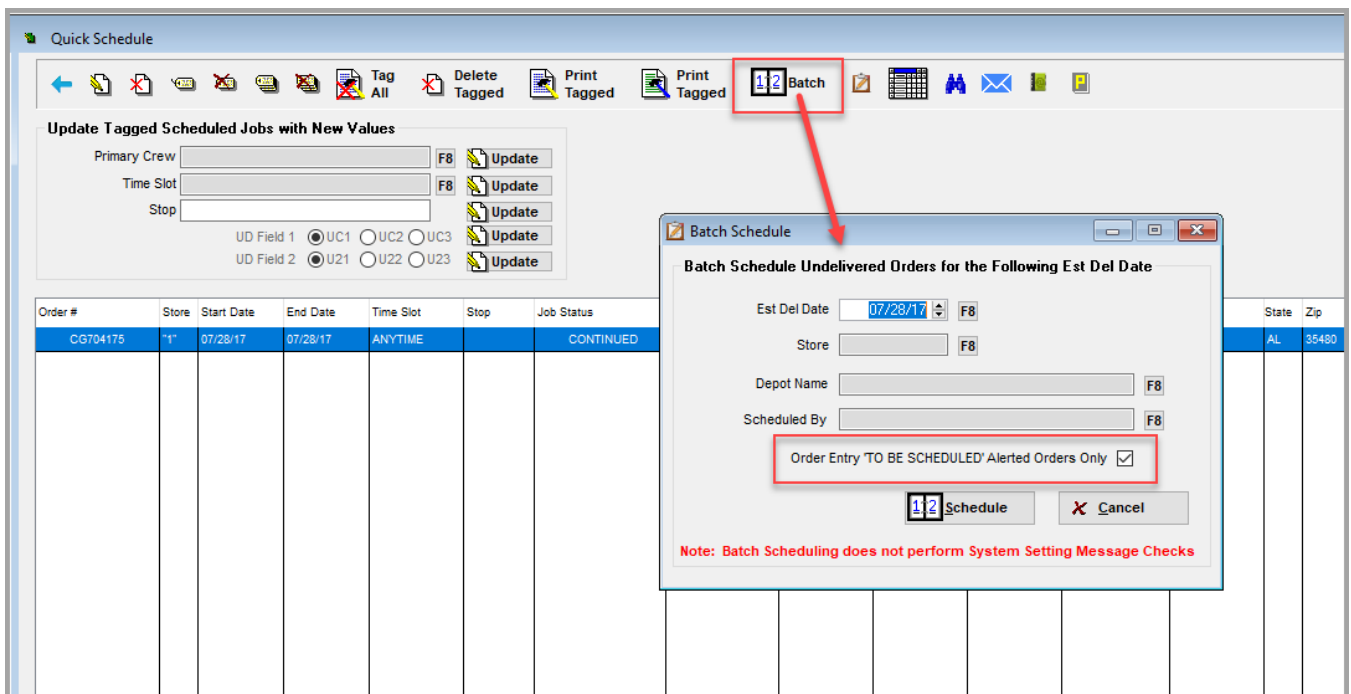


Figure Batch Schedule

## Find Screen

When using the Find screen, the ability to set a filter as the default filter has been added.

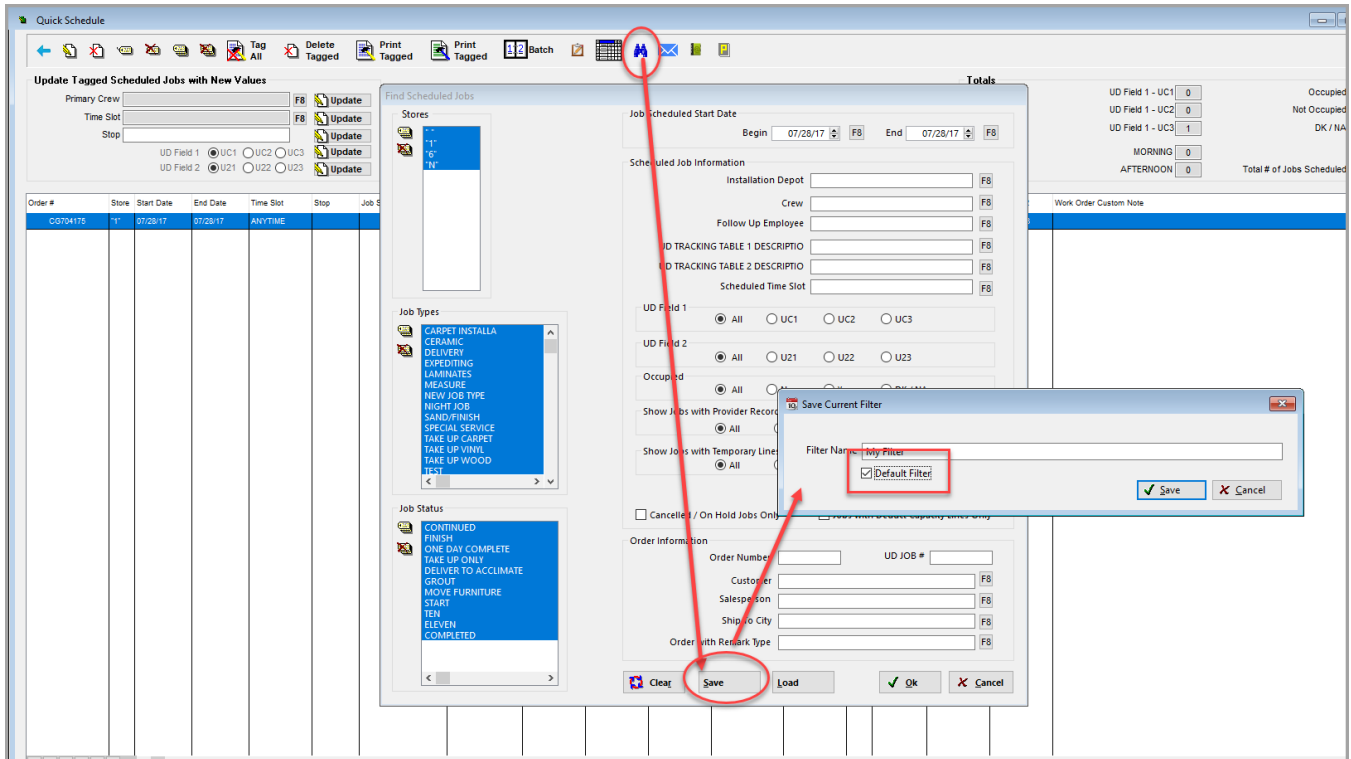


Figure Find screen

## View PDF History



The View PDF History button has been added to the toolbar.

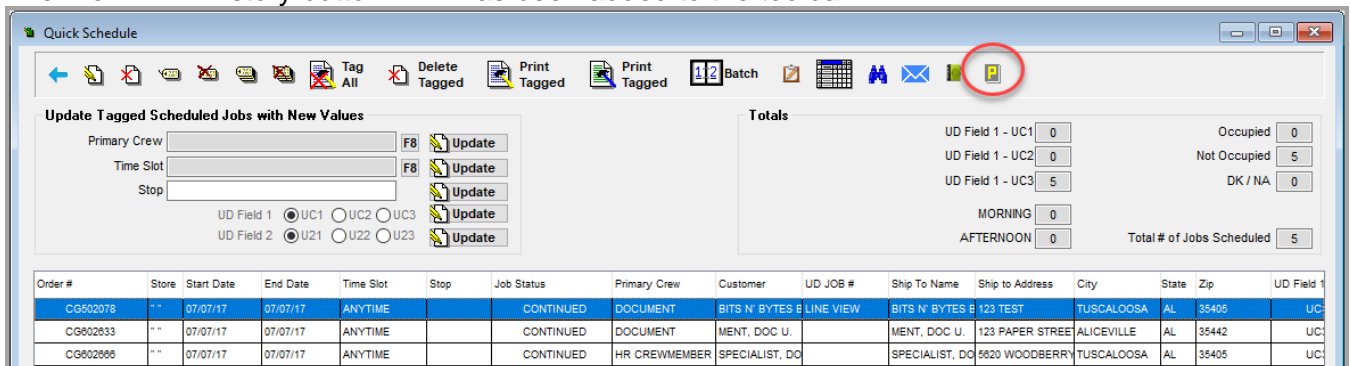


Figure Quick Schedule screen

# Weekly Grid

A Reset button has been added to return column widths back to their default settings.

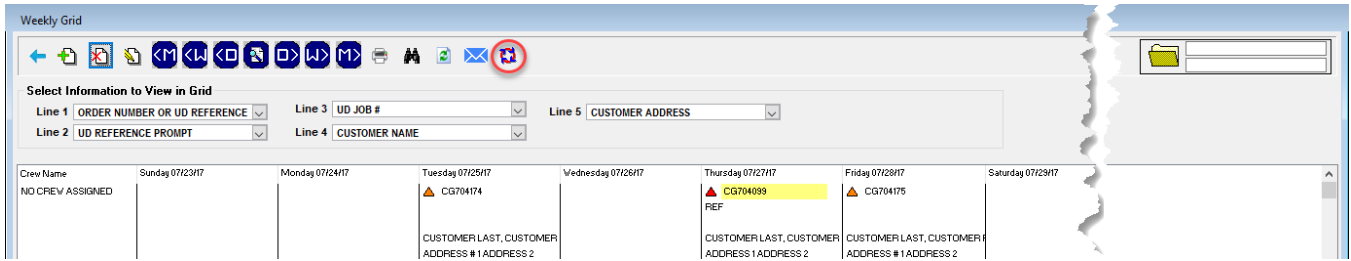


Figure Weekly Grid screen

The Weekly Grid can now be sent to CSV.

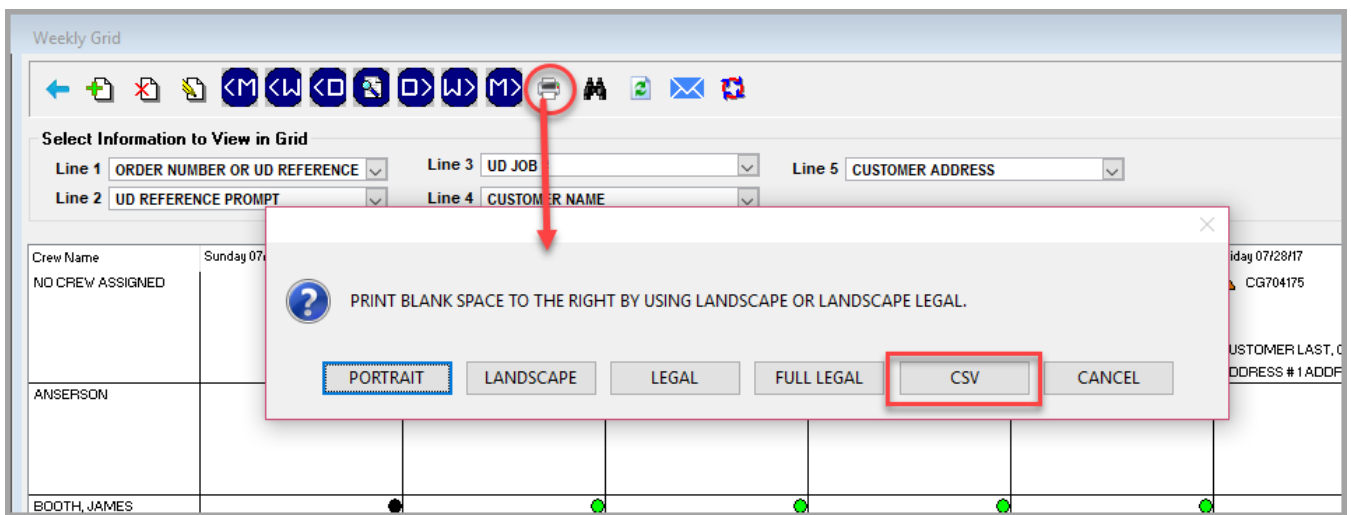


Figure Printing the Weekly Grid

The Weekly Grid will now automatically preview when printing.

The ability to email a selected record from the Weekly Grid has been added. Interoffice Mail, Email, and Email Using a Template can be used.

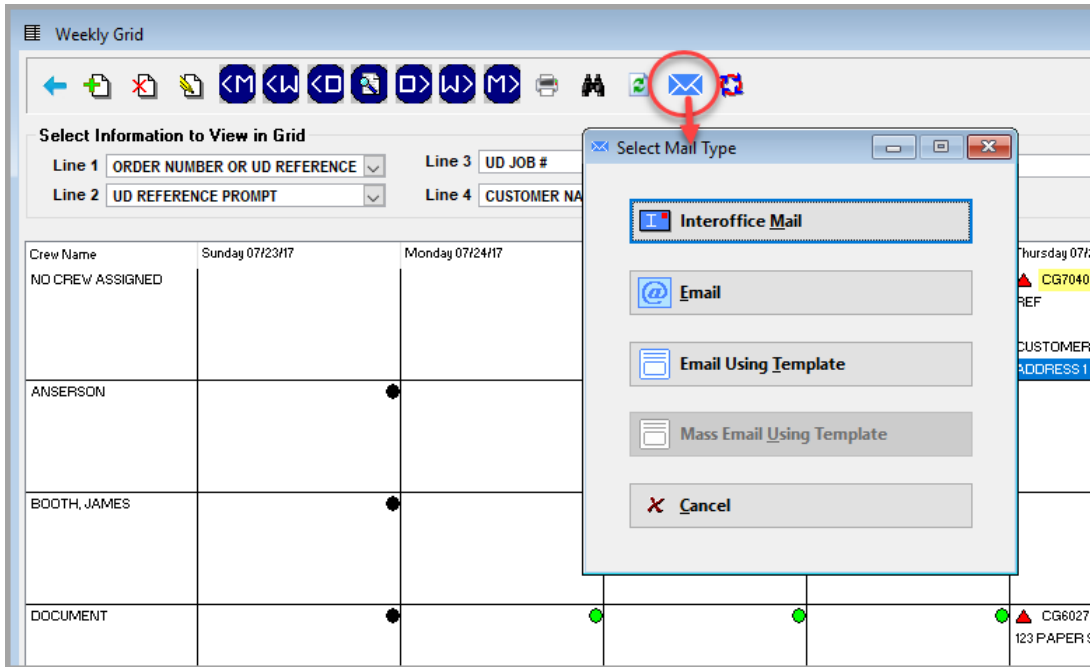
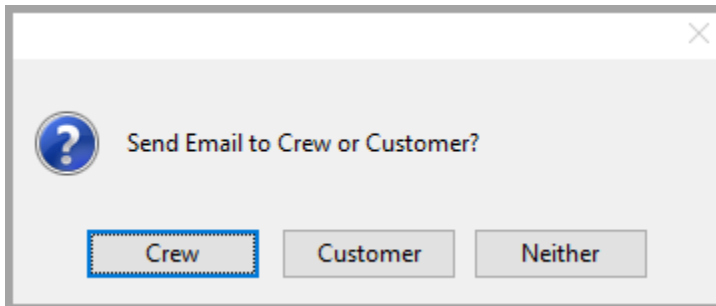


Figure Weekly Grid Email screen

The user will be able to select either Crew, Customer, or Neither as the recipient.



## Editing a Job

The ability to email job information or line information from this screen has been added. The user can choose Crew, Customer, or Neither as the recipient.



Figure Changing Scheduled Job Record screen

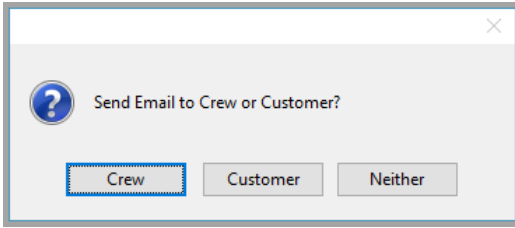
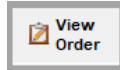


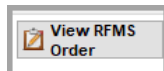
Figure Email Option screen



The View Order button is now available while in Read Only mode.

## Alerts

The ability to view all notes/remarks for an order has been added.



The View RFMS Order button has been added to the alerts screen.

Type	Store Order #	Order Type	Line	PC	Customer	Sales Rep 1	Sales Rep 2	Ship To Name	UD JOB #	&UD Date1 Ef	Order Da
TRACKING NOTE	**	CG203499	ORIGINAL	NA	MILLS, KEVIN	MIKE		MILLS, KEVIN	14388 WESTLA	04/21/17	2/31/12
TRACKING NOTE	"1"	CG302557	ORIGINAL	NA	BARKER, MELANIE	ANDREW		BARKER, MELANIE		02/08/13	1/22/13
TRACKING NOTE	"1"	CG302557	ORIGINAL	NA	BARKER, MELANIE	ANDREW		BARKER, MELANIE		02/08/13	1/22/13
LINE ADDED	"1"	CG302558	ORIGINAL	1	CUSTOMER, TEST	ANDREW		CUSTOMER, TEST			1/24/13
LINE ADDED	"1"	CG302558	ORIGINAL	3	CUSTOMER, TEST	ANDREW		CUSTOMER, TEST			1/24/13
LINE ADDED	"1"	CG302558	ORIGINAL	4	CUSTOMER, TEST	ANDREW		CUSTOMER, TEST			1/24/13
LINE STATUS CUT/RESERV	"6"	CG302569	CHANGE	1	CUSTOMER, MAIN	ANDREW		CUSTOMER, MAIN	BILLING GROUP	02/28/13	2/28/13
LINE ADDED	"6"	CG302569	CHANGE	2	CUSTOMER, MAIN	ANDREW		CUSTOMER, MAIN	BILLING GROUP	02/28/13	2/28/13
LINE STATUS CUT/RESERV	"1"	CG302570	ORIGINAL	1	CUSTOMER, INACTIVE	BEN		CUSTOMER, INACT		06/26/14	3/04/13
LINE ADDED	"1"	CG302570	ORIGINAL	9	CUSTOMER, INACTIVE	BEN		CUSTOMER, INACT		06/26/14	3/04/13
LINE ADDED	"1"	CG302570	ORIGINAL	10	CUSTOMER, INACTIVE	BEN		CUSTOMER, INACT		06/26/14	3/04/13
TRACKING NOTE	"1"	CG302573	ORIGINAL	NA	CUSTOMER, BRANCH	ANDREW		CUSTOMER, BRAN		03/14/13	3/13/13
TRACKING NOTE	"1"	CG302581	ORIGINAL	NA	CUSTOMER, BRANCH	ANDREW		CUSTOMER, BRAN		04/24/15	3/26/13
LINE ADDED	"1"	CG302581	ORIGINAL	2	CUSTOMER, BRANCH	ANDREW		CUSTOMER, BRAN		04/24/15	3/26/13
LINE ADDED	"1"	CG302581	ORIGINAL	2	CUSTOMER, BRANCH	ANDREW		CUSTOMER, BRAN		04/24/15	3/26/13

Figure Alerts screen

The Browse screen can now be sorted by Estimated Delivery Date.

## Orders Ready to Schedule

The browse can now be sorted by Estimated Delivery Date.

# Create Provider Records

A Warning Message is now displayed if an installer record has been created for one of the tagged lines.

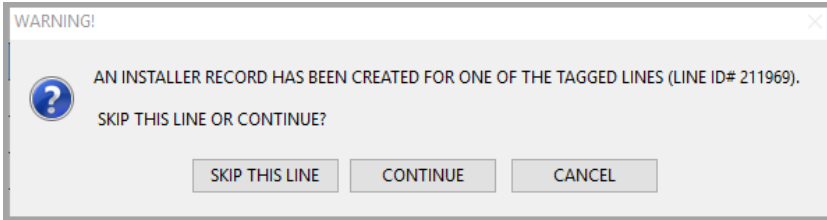


Figure Warning Message

# View Orders

The Supplier column has been added to the browse screen on the View Order screen.

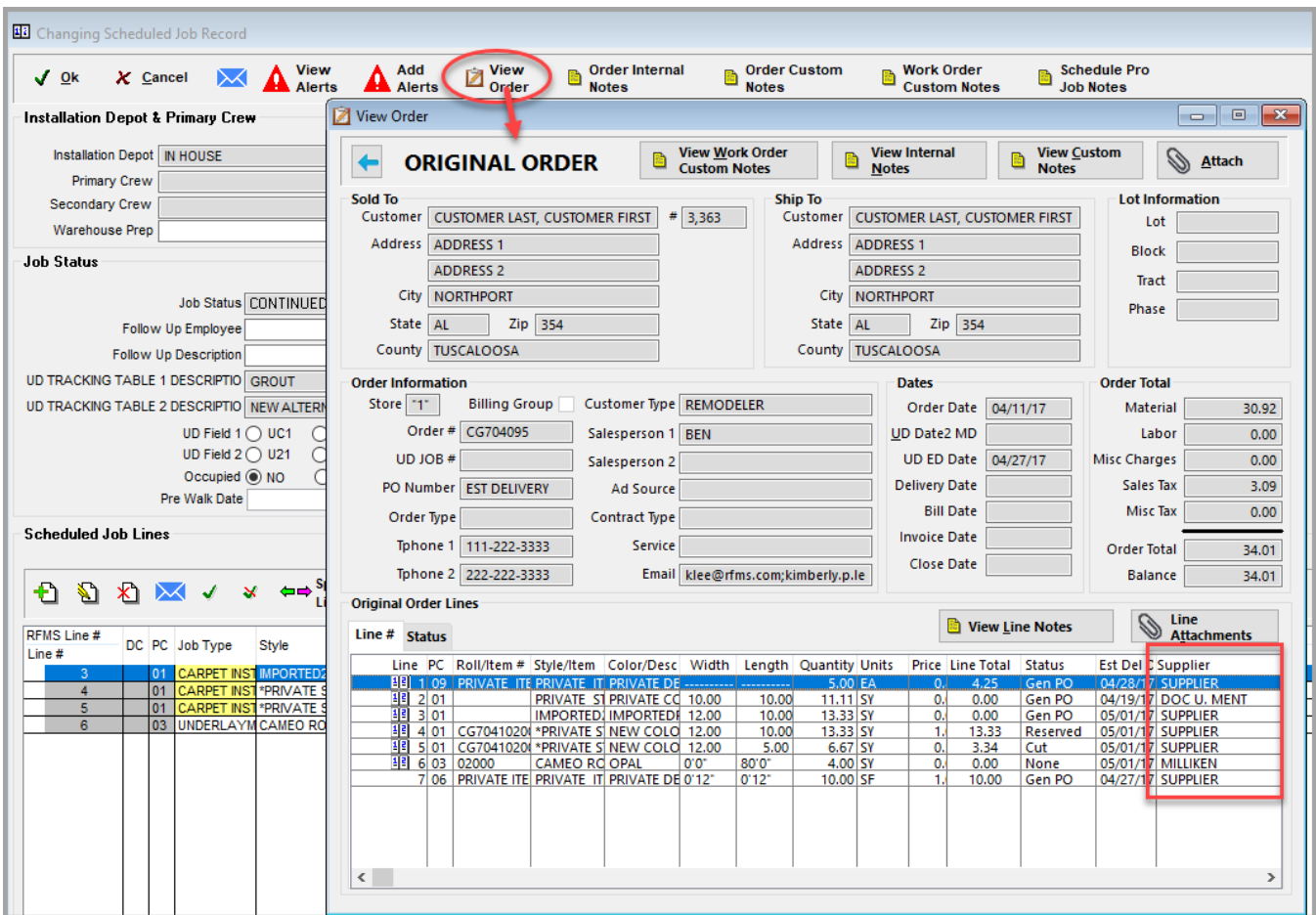


Figure View Order screen

# Reports

All Schedule Pro Reports now include store codes as well as the name in the header when specific store codes are selected. If all Store Codes are selected it will read ALL STORES.

WEEKLY SCHEDULE FOR CARPET INSTALLATION SF

STORE: "" (DOCUMENTATION COMPANY)

ALL DEPOTS  
CREW: DOCUMENT  
ALL CUSTOMERS  
ALL SALESPERSONS  
ALL CITIES  
07/23/17 TO 08/05/17

ALL JOB STATUSES

CREW	SUN 07/23/17	MON 07/24/17	TUES 07/25/17	WED 07/26/17	THURS 07/27/17	FRI 07/28/17	SAT 07/29/17
DOCUMENT Phone: 205.205.2052 Daily Capacity: 50,000.00	0.00	0.00	0.00	0.00	CG704132 MENT, DOC U. PROMISE DATE ON 8:00 AM- 5:00 PM 180.00	0.00	0.00
	0.00	0.00	0.00	0.00	CG704132 MENT, DOC U. PROMISE DATE ON 8:00 AM- 5:00 PM 180.00	0.00	0.00

Figure Weekly Schedule preview

WEEKLY SCHEDULE FOR CARPET INSTALLATION SF

ALL STORES

CREW: NO CREW ASSIGNED  
ALL CUSTOMERS  
ALL SALESPERSONS  
ALL CITIES  
07/23/17 TO 08/05/17

ALL JOB STATUSES

CREW	SUN 07/23/17	MON 07/24/17	TUES 07/25/17	WED 07/26/17	THURS 07/27/17	FRI 07/28/17	SAT 07/29/17
NO CREW ASSIGNED Phone: Daily Capacity: 0.00	0.00	0.00	CG704174 CUSTOMER LAST, C 8:00 AM- 5:00 PM 225.00	0.00	CG704099 CUSTOMER LAST, C 8:00 AM- 5:00 PM 100.00	CG704175 CUSTOMER LAST, C 8:00 AM- 5:00 PM 270.00	0.00
	0.00	0.00	0.00	0.00	CG704099 CUSTOMER LAST, C 8:00 AM- 5:00 PM 1,193.97	0.00	0.00

Figure Weekly Schedule preview

## Daily Scheduling Reports

Reports > Daily Scheduling Reports

Customer Phone Number has been added to the CSV file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X
1	Store	Depot	Crew	Salespers	Order #	UD JOB #	Cus	Line	Style	Color	Job Type	Quantity	Customer	Phone										
2	DOCUMENT	IN HOUSE	DOCUMENT	JEMECHIA	CG502078	LINE VIEW	BITS	PM	PLACE YO	MOCCASII	CARPET IN	300	1.23E+09											
3	DOCUMENT	IN HOUSE	DOCUMENT	JEMECHIA	CG502078	LINE VIEW	BITS	PM	TALK OF T	BUTTER IC	CARPET IN	180	1.23E+09											
4	DOCUMENT	IN HOUSE	NO CREW	JEMECHIA	CG502078	LINE VIEW	BITS	PM	CARPET R	BEIGE	VINYL EA	1	1.23E+09											
5	DOCUMENT	IN HOUSE	DOCUMENT	DOC TEST	CG602633		ME	4	CPT-(BASIC)-GLUED	CARPET IN	160	2.05E+09												

## Job Summary Reports

[Reports > Job Summary Reports](#)

The Tracking Table fields have been added to the CSV.

A	B	C	Q	R	S	T	U	V
Date	Store	Depot	Primary Job	Primary Site	Primary Location	Primary Quantity	UD TRACKING TABLE 1 DESCR	UD TRACKING TABLE 2 D
#####	STORE NA	IN H	CARPET IN	18TH HOLE	RESERVED	CARPET INSTALLATION	23.94 SF	
#####	STORE NA	NEV	CARPET IN	PRIVATE	GENERATE	CARPET INSTALLATION	590.03 SF	
#####	DOCUMENT	IN	LAMINATE	AMERICAN	GENERATE	LAMINATES	15 SF	
#####	MY NEW SI	IN	CARPET IN	PRIVATE	C NONE	CARPET INSTALLATION	100 SF	
#####	DOCUMENT	IN	CARPET IN	BLACK AS	DELIVERED	CARPET INSTALLATION	360 SF	
#####	MY NEW SI	IN	CARPET IN	*PRIVATE	ON ORDER	CARPET INSTALLATION	270 SF	

Figure Job Summary Reports CSV

## Total and Analysis Reports

[Reports > Total and Analysis Reports](#)

A total column has been added to the Total # of Jobs column.

QUANTITY TOTALS BY CREW

ALL STORES  
DEPOT: IN HOUSE  
ALL CREWS  
ALL JOB TYPES  
ALL CUSTOMERS  
ALL SALESPERSONS  
ALL CITIES  
DATE: 07/23/17 to 08/05/17

ALL JOB STATUSES

Crew	Total # of Jobs	CARPET INSTALLATION	CERAMIC	LAMINATES	WOOD	VINYL	VCT	TAKE UP CARPET	TAKE UP WOOD	TAKE UP VINYL	SPECIAL SERVICES
NO CREW ASSIGNED	3	1,794.97	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
DOCUMENT	3	383.94	0.00	15.00	0.00	0.00	0.00	0.00	0.00	0.00	6.00
<b>Total</b>	<b>6</b>	<b>2,178.91</b>	<b>0.00</b>	<b>15.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>6.00</b>

## Dye Lot Allocator (17.1.4)

The ranking system has been changed to look at amount left first with smallest amount being best. Number of rolls touched is last with fewest being best. Age of inventory is still second with oldest being best.

# CMM

## Projects

### Orders Tab

The ability to Print Work Orders has been added to the Orders Tab.

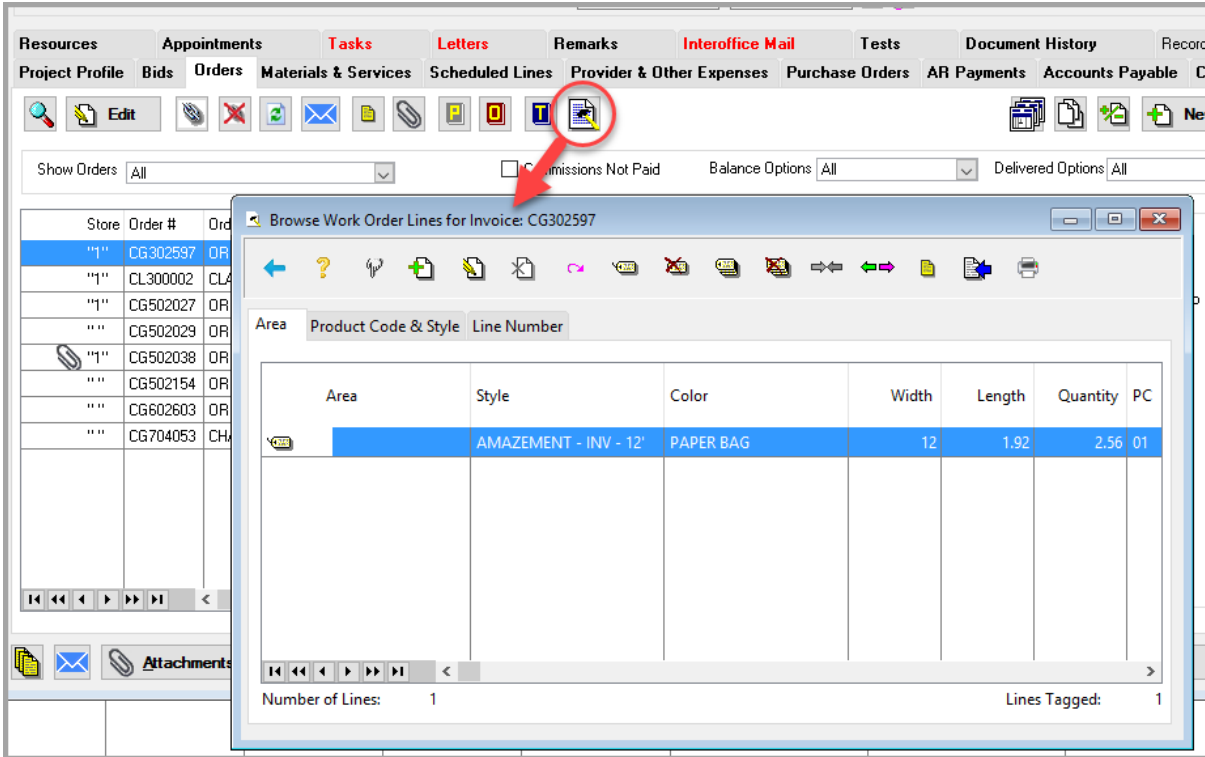


Figure Orders Tab/Work Order Screen

# ERRM

## Line PO Cost Adjustment

This has been removed since the cost is tied to the Inventory record.

# Mult-Pay

Horizontal Grid Lines have been added to the screen based on the user's choice on [Set Up Global Interface](#).

Multiple Invoice Payment for DOCUMENTATION-MENUS & REPORTS

File Options Utilities Help Navigator

Customer: GOOD, GLINDA THE [F8]  Include on Hold Delivered: 06/30/17 [F8]

Selection: Invoice [v]  Full Match

Billed Date	Delivery Date	Order Date	Order Number	Balance Due	PO Number	Count	Tagged
05/01/17	05/01/17	05/01/17	CG704126	758.54		10	10
06/01/17	06/01/17	06/01/17	CG704090	22,140.25			
06/08/17	06/08/17	06/08/17	CG602684	2,501.00			

Totals: 187,525.14 0.00 0.00 187,525.14

Register: 001 - CASH\CHECKS (Store: " ") Payment Date: 07/26/17 [F8]

Reference: [ ] Check Amount: 0.00 [E] [D]

Comments: [ ] Cash Amount: 0.00 [E] [D]

Check #: [ ] Card Amount: 0.00 [E] [D]

Discount Act: 405 [F8] DISCOUNTS TO CUSTOMERS Received: 0.00

Browsing Records [ ] 17.1.0.19395 clientda1\QA - qa\_doc

Figure Mult-Pay screen