



**Version 22.1**

# **Update Document**

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# Introduction

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 alterations, see the release notes on the download web page or [Release Notes – RFMS Help Desk \(zendesk.com\)](#)

## RFMS Core

RFMS Core Program Suite For Sql

[Rfms Update](#) (Last Download Date 4/8/2021) | [Documentation](#)  
[B2B Service](#) | [Manual](#)  
[Barfont \(New Installs Only\)](#) | [Documentation](#)  
[Release Notes](#) (Last Download Date 4/8/2021)  
[RFMS Workstation Components \(New Installs Only\)](#) | [Documentation](#)

To see what you may have missed in previous updates, click [here](#).

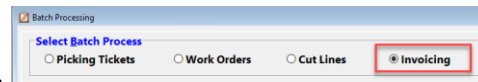
[For directions on loading updates to the RFMS software, click here.](#)

The same documentation is included in the online help system and can be accessed by pressing the F1 button at any RFMS screen. If something is on the screen you either do not recognize or understand, check this document, refer to the Help Files by pressing F1 or go to <https://rfmsinc.zendesk.com>

# Order Entry

## Batch Invoice Printing and Emailing

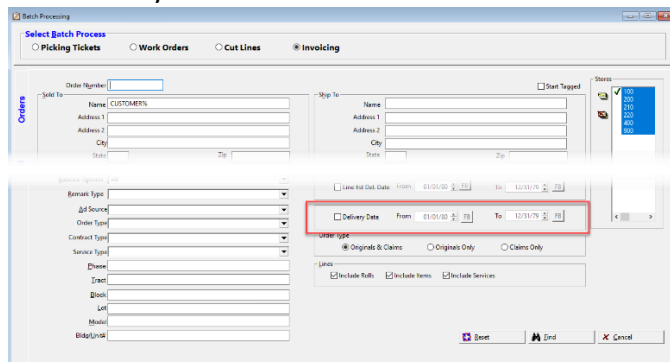
*Order Entry > File > Batch Processing or F12*



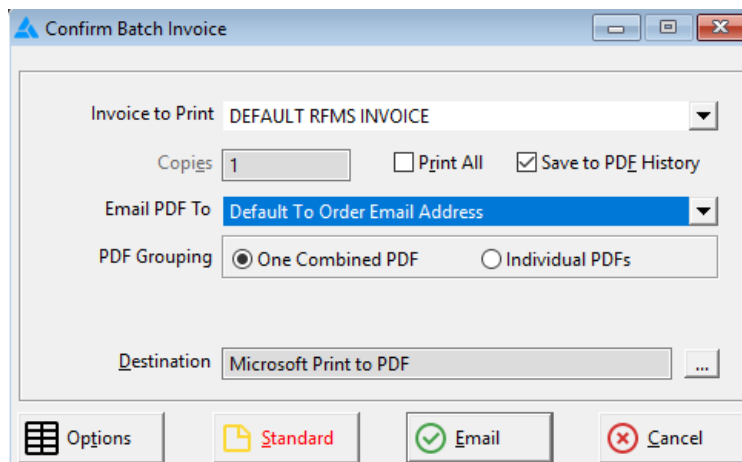
This new function been added to Batch Processing.

Use the binoculars to find the list of invoices to work with.

The delivery date to and from has been added to the Invoice find to be used with this new function.



Once the list is filtered, tag the orders to process. select the print button  
On the Confirm Batch Invoice Screen



1. Select the invoice to print
2. To Print Only – Select Print All – this selection is sticky
  - a. Set the number of copies
3. Optionally Save to PDF History
4. Email PDF – There are 3 email address options
  - Default to Order Email Address
  - Default to Customer Contact for Invoice Email
  - Custom Email Address – this allows typing in an email address
5. Select either to combine all tagged invoices into a single pdf or a pdf file per invoice.

For more detailed information on the feature see the Zendesk article [here](#)

# Billing Groups

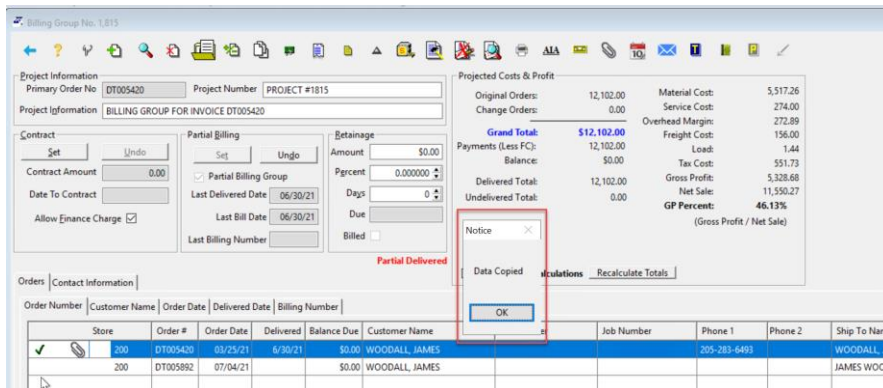
The ability to copy the data from the billing group browse and paste it into another program (such as a spreadsheet) has been added.

There are different levels as to what is copied depending on the keys used.

**Ctrl-C:** Click on a row to highlight it. Mouse over the data that you want to copy and press Ctrl-C.

**Ctrl-Alt-C** Click a row to highlight it. Press Ctrl-Alt-C to copy the entire row plus the header.

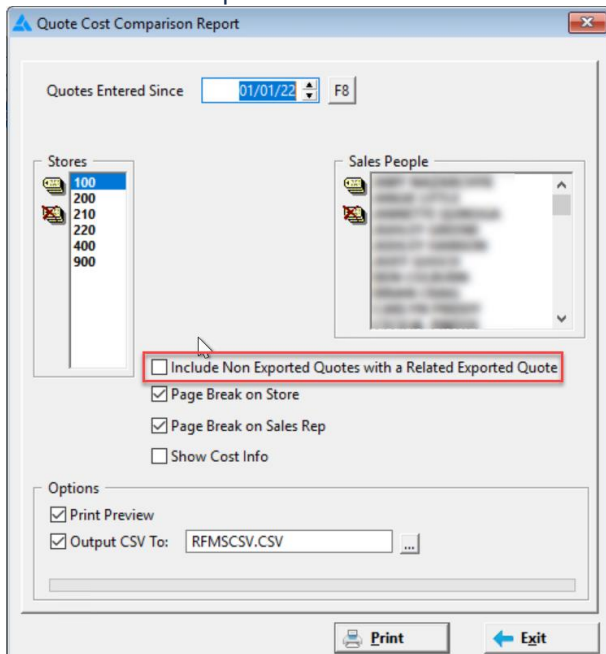
**Ctrl-Alt-Shift-C** Click a row to highlight. Press Ctrl-Alt-Shift-C to copy all data on the screen. This is meant to be used to copy filtered data plus the header



See full article [here](#).

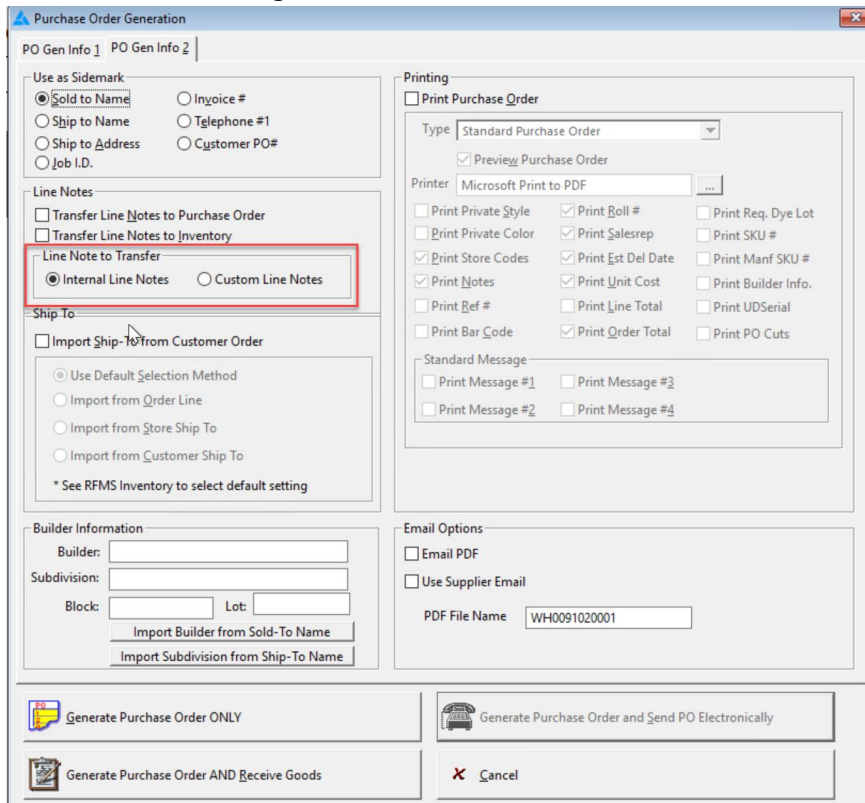
# Quote Cost Comparison Report

A checkbox has been added to include non exported quotes which have a related quote exported to be included in the report.



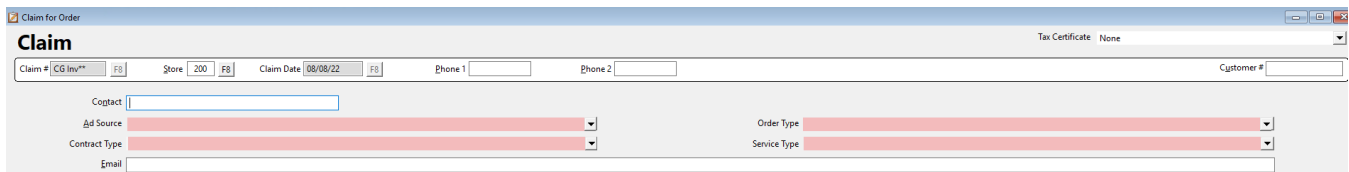
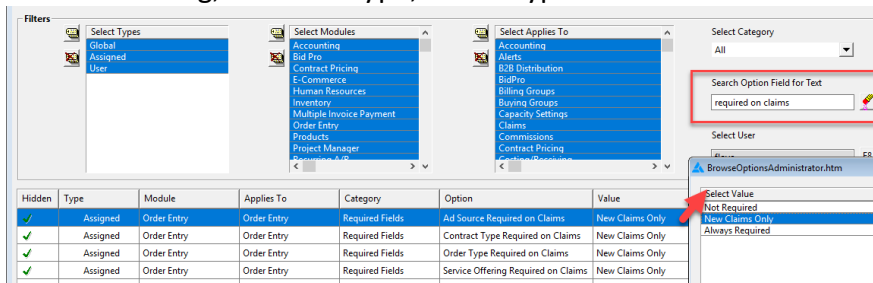
# Purchase Orders from Order Line

The choice of sending custom or internal lines notes is now available.



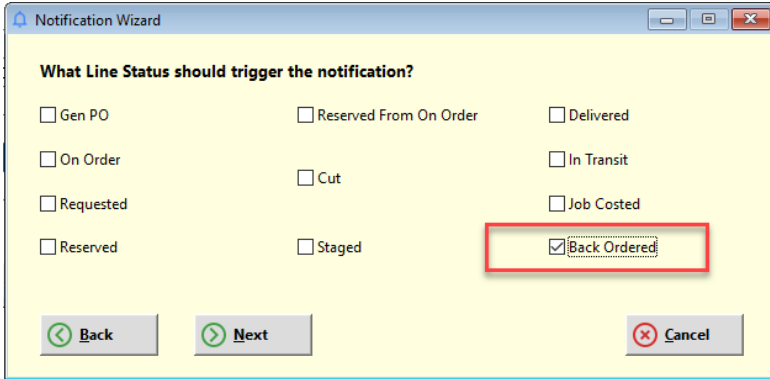
# System Option

There are now System Options requiring the marketing fields on claims. These fields are Ad Source, Service Offering, Contract Type, Order Type.



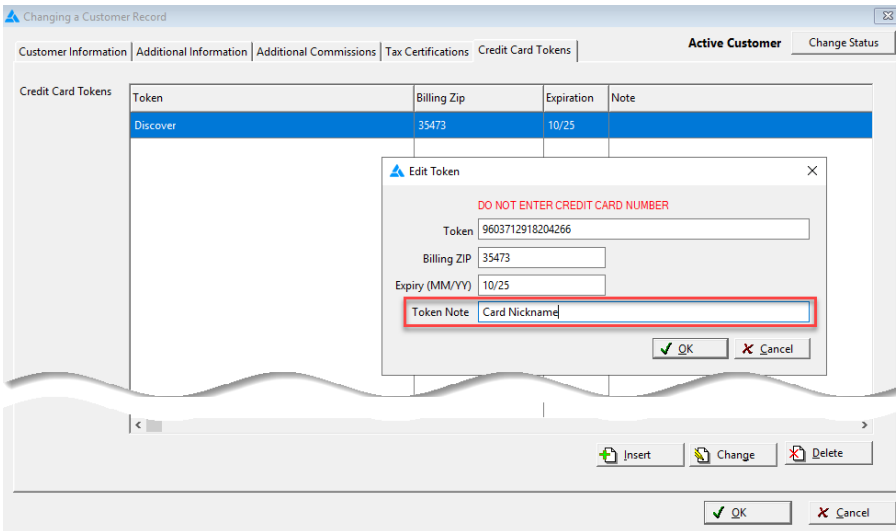
# Notifications

The ability to add a notification on a line status changing to back orders has been added. See full documentation on Notifications [here](#).



# Clover Connect Credit Cards

Customer Payment: Clover Connect Credit card users now can nickname a saved credit card to make it easier to choose the correct one later.



# 2020 Integration

An option is now given to send line notes to RFMS Order Custom line notes if not checked the 2020 notes will go to internal line notes.



# BidPro

The Range Edit Routine has been updated to be more consistent when selecting conditions and now also can update Cost.

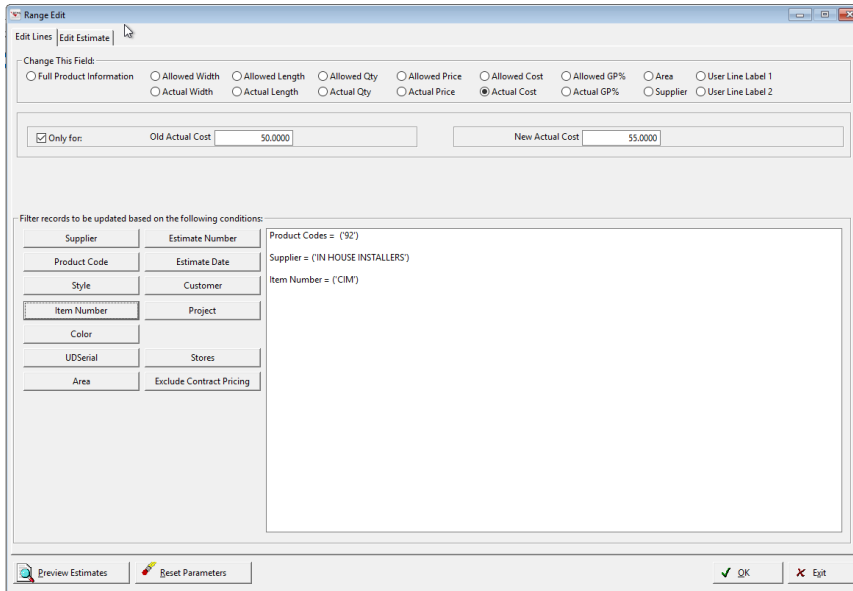


Figure 1 Version 22.1

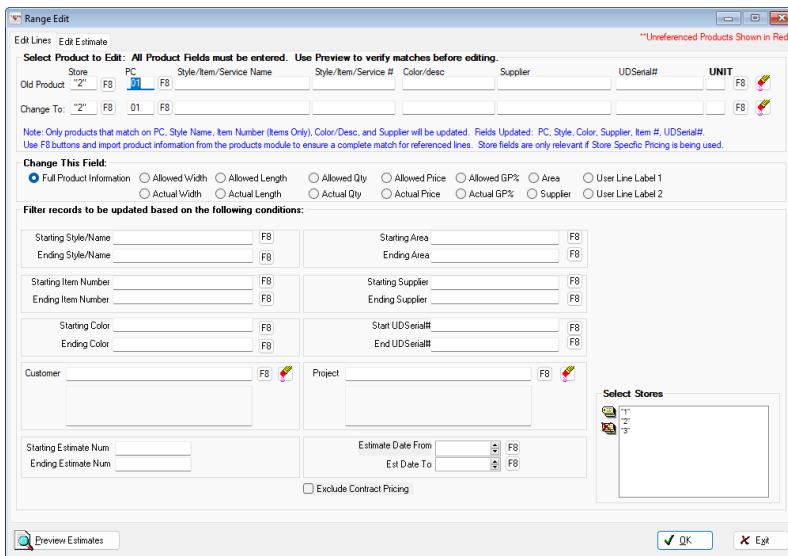
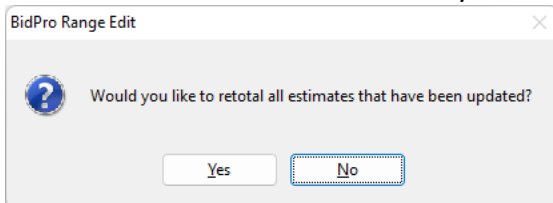


Figure 2 Pre Version 22.1

If the edit to the lines will affect the estimate total the routine will ask the user if the total on the estimates should be recalculated by the routine.



# E-Commerce

## General

ASN manual match has been modified to display the remaining amount on the Purchase Order for reference when creating the match. This helps when a vendor doesn't send the correct UOM such as EA when it should be CT and we will show them the amount of SF that equals to the number of EA that comes in if it is CARTON. If the carton qty is listed on the product. It also helps when the order is split between two BOL's.

For Rolls it shows the amount that is on the purchase order for the SY but they need to enter in the Beg Length in order for it to be correct.

Verify Units/Amount

There is a difference in the unit of measure between the purchase order and the advanced ship notice. This can cause an error in that the amounts will not match.

Update the amount of the advanced ship to the correct amount based on the purchase order units

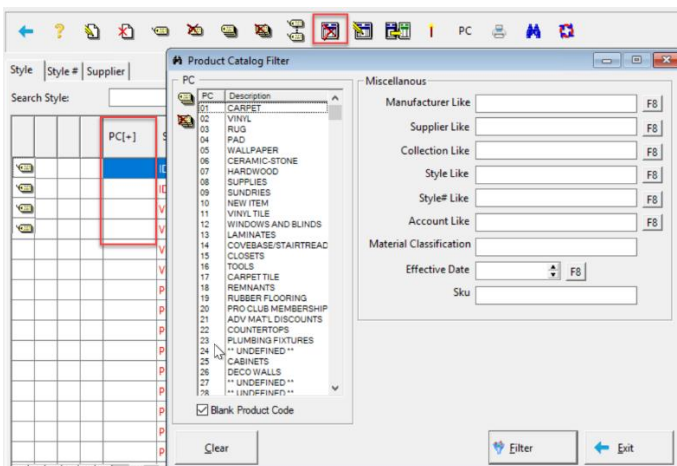
Advanced Ship  
22 EACH

PO Remaining Amount (Ordered - Received - All Matched)  
841.28 Square Feet / 38.24 = 22 CT

Amount to Post during Receiving  
0.00 Square Feet

OK Cancel

The ability to tag records without product codes has been added to the E-Commerce download screen. This is added specifically for the purposes of mass deleting.



The following have been added to the Material Classification Codes:

### Concrete

CONEPO -> Epoxy

CONSTN -> Stained

CONPOL -> Polished

### Installation Material

INSBKB -> Backerboard

INSCLK -> Caulk

INSFLH -> Floor Heat

INSSHC -> Shower Components

INSTHM -> Thinset/Mortar

INSTSC -> Tile and Stone Care

INSWCI -> Waterproof Crack Iso\



Editing the header buy and sell numbers on triggers the system to ask if the exception color buy and sell numbers should be removed. These numbers cannot be edited on Ecommerce or Gateway records.

**Changing an Item Product**

Product Information 1 | Extended Information 2

Store: 100 F8  
 Product Code: 06 F8 CERAMIC-STONE  
 Manufacturer: B & F CERAMIC F8  
 Supplier: B & F CERAMIC F8  
 Supplier Item Name: CEMENTINE 8X8 WALL/FLOOR DECO  
 Supplier Item Number: C8X8WFD  
 Private Supplier: B & F CERAMIC F8  
 Private Item Name: CEMENTINE 8X8 WALL/FLOOR DECO  
 Private Item Number: C8X8WFD  
 Units: SF F8  
 FOB Point:   
 Sample Type: F8  
 Quality: F8  
 Warranty: F8  
 MySort/Tox:   
 UserLabel:   
 CAF 2 /FHA:   
 Unit Cost: \$7.0146  
 Freight Factor: \$0.0000  
 Special Item: \$0.0000  
 Pur Rebate: \$0.0000  
 Adv Rebate: \$0.0000  
 Cont Inst: \$0.0000  
 Ret Inst: \$0.0000  
 Load: \$0.0000  
 Load Percent: 6.0000 %

Entry Type: MANUAL

**Detail Buy/Sell Quantities**

There are detail level exceptions for Buy/Sell. Do you wish to remove the exceptions?

Yes No

Buy In Multiples Of: 11.6600  
 Sell In Multiples Of: 11.6600 (More)

Propagate cost changes across all matching records

OK Cancel

Manufacturer	Cost	Units	Priv Supplier	Buy	Sell
STONE	4.4900	SF	LIA TILE & STONE		
STONE	4.4900	SF	LIA TILE & STONE - PROSOL		
NT USA	12.6900	EA	BATI ORIENT		
NT USA	10.5500	EA	BATI ORIENT		
NT USA	10.5500	EA	BATI ORIENT		
NT USA	11.2300	EA	BATI ORIENT		
NT USA	12.6900	EA	BATI ORIENT		
NT USA	12.6900	EA	BATI ORIENT		
NT USA	12.6900	EA	BATI ORIENT		
AMIC	7.0146	SF	B & F CERAMIC	11.6600	11.6600
AMIC	7.0146	SF	B & F CERAMIC - PROSOL		
AMIC	5.9346	SF	B & F CERAMIC		
AMIC	5.9346	SF	B & F CERAMIC - PROSOL		
AMIC	3.5046	SF	B & F CERAMIC		
AMIC	3.5046	SF	B & F CERAMIC - PROSOL		
AMIC	2.1546	SF	B & F CERAMIC		
AMIC	2.1546	SF	B & F CERAMIC - PROSOL		
AMIC	2.5866	SF	B & F CERAMIC		

Manf SKU	Buy	Sell
GIGLIO O88CGD	11.6600	11.6600
OPTICAL O88COD	0.0000	0.0000

100 06 CEMENTINE 8X8 WALL/FLOOR DECO CEMENTINE 8X8 WALL/FLOOR DECO C8X8WFD C8X8WFD 8"X8" B & F CERAMIC B & F CERAMIC 7.0146 SF B & F CERAMIC 0.00

Manufacturer: B & F CERAMIC Unit Cost: \$7.0146  
 Priv Supplier: B & F CERAMIC Freight Factor: \$0.0000  
 FOB Point: Special Item: \$0.0000  
 Collection: Pur Rebate: \$0.0000

**After Answering Yes**

Private Description	Priv Descrpt	Supplier Description	Supplier Des	SKU	Manf SKU	Buy	Sell	Description Type
GIGLIO	O88CGD	GIGLIO	O88CGD			0.0000	0.0000	