



# Version 22.0.3

# 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>

# System-Wide

## Carpet America Recovery Effort

CARE's differential assessment plan, which CalRecycle has conditionally approved, will take effect on April 1, 2022. The differential assessment is based on two factors: material type -- broadloom vs. tile -- and the percent of post-consumer (PC) content in new carpet. The Plan has four levels of assessment:

- Broadloom, <10% PC content: \$.35 per square yard
- Broadloom, > or = 10% PC content: \$.33 per square yard
- Carpet Tile, <10% PC content: \$.50 per square yard
- Carpet Tile, > or =10% PC content: \$.48 per square yard

RFMS has made changes throughout to accommodate this differential assessment. For Details Click [Here](#).

## Notifications

The ship to address is now part of the notification email and text

SP Email

---

**QN** QA Notifications  
Mon 2/21/2022 10:46 AM  
To: Carlyn Priddy  
Notification for Schedule Pro Job: CG200009  
Customer: FURY, NICK

Ship To:  
FURY, NICK  
1014 SHIELD STREET  
BIRMINGHAM AL 35242

Scheduled Start Date: 02/21/22 8:00 AM  
Scheduled For: HARDWOOD  
SP Schedule Date and Time

## Attachments

The Attachments screen now supports right clicking on the View button to copy the file name or url. This can be helpful if the attachment is a URL and the user is on RDP. They can copy the URL and paste in a local browser.

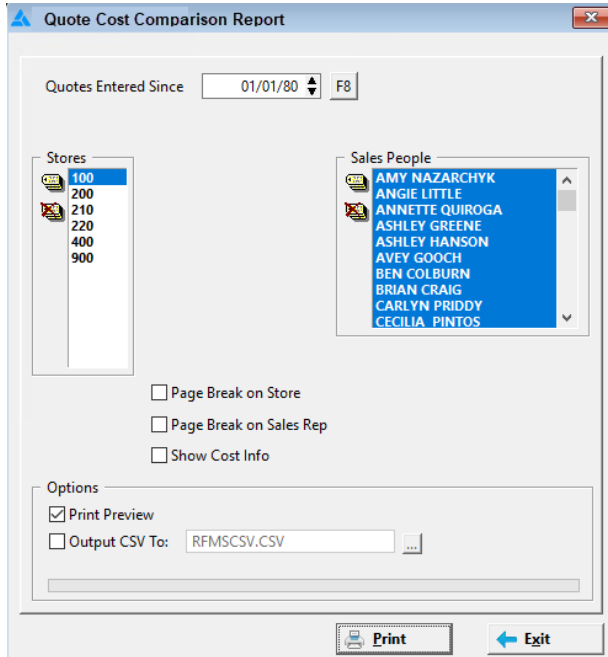
The screenshot shows the 'Attachments' interface. At the top, there is a toolbar with icons for navigation (back, forward), a magnifying glass over a document labeled 'View', a plus sign labeled 'Insert', a red X over a document labeled 'Delete', a printer icon labeled 'Print', and a document icon labeled 'Show Path'. A tooltip 'Right Click to copy Filename/URL' is visible over the 'View' button. Below the toolbar is a table with two columns: 'Description' and 'Parent Document'. The first row in the table has 'Authorization Link' in the 'Description' column.

Description	Parent Document
Authorization Link	

# Order Entry

## Quote Cost Comparison Report

*Order Entry>Reports>Quote Cost Comparison Report*



This new report shows changes to cost in products vs the cost on the quote line. Costs are changing quickly and users need a way to see if a quote is losing money. The report compares line cost on the quote with the current costs on the product record.

The show cost Info checkbox is only available to users with the system option Display Costs in Orders and Inventory, also Display GP% in Orders -set to yes

**Amount Change Column:** This is the total line amount changed quantity x \$ unit change.

Quote #	Customer	Line #	Style/Item	Color/Desc	Item Number	Line Cost	Product Cost	% Change	Amount Change
<b>Store 100</b>									
<b>Sales Rep BEN COLBURN</b>									
EW017699	PARADY, CR	4	GROUT POV	BIRCH	ZTEG28	41.99	44.12	5.07	2.13
EW017699	PARADY, CR	1	VENETO SAI	XXXX	NVENSAN12	2.89	2.98	3.12	10.08

Unit	EA	Products	Unreferenced - [Ctrl-U]	Item Width	30.84	61.68	None	0003	n/a	0	35.96%	17.8200	0.0000	1.0704	0.8406
				0	72.58	72.58	None	0004	n/a	0	35.95%	41.9900	0.0000	2.5194	1.9786

Store	PC	Supplier (Priv)	Name (Priv)	Item Number (Pr)	Name(Supplier)	Size	Unit Cost	Unit	Cancel Date	Description (Priv)	Number (Priv)	Description(Supplier)	Cancel Date	SKU
100	06	EMSER TILE LLC	GROUT POWER 25LBTEC	ZTEG28	GROUT POWER 25LBTEC	0X0	44.1200	EA		ALMOND	ZTETA550984	ALMOND		ZTETA550984

# Providers Earnings Report

The ship to zip code is included in the .csv output as of version 22.0.1.

## My Flooring Link

The request to generate a My flooring link now includes the Username.

Queue: [store-61aacd204ff6417c99a316e8c721ca52](#)

Method: [sendmyflooringlink](#)

[Jump to reply](#) | [Compose duplicate](#)

## Outgoing Message

Time: 3/8/2022 5:37:29 PM +00:00

```
No message was sent,  
this message originated from the store.
```

### Outgoing metadata:

```
replstatus: 1
```

## Reply from Store

Time: 3/8/2022 5:37:29 PM +00:00

```
{  
  "InvoiceNumber": "CG200058",  
  "OrderType": 2,  
  "UserName": "CPriddy"  
}
```

# Inventory

Receiving Moved Inventory now has a check box to automatically select to have a tag printed. Once it is checked it should remain checked until someone manually unchecks it.

Receive Moved Inventory

From Store 100 To Store 200 Date Moved 03/01/22

Trans # 1000 Status In-Transit

Prod Code 01 CARPET Style/Item 18TH HOLE - 12'

Roll/Item # CG8603 Color/Desc EMPRESS GARDEN

Width 12.00 Length 10.00 Quantity 13.33 SY

Date Rcvd 03/01/22 F8 (Adjustment Date in Inventory Adjustments)

Received By

Location

Notes

Est Transfer Date F8 Truck Number

Tag Record for Printing

Accept (OK)

Cancel this Move

Exit without Moving

## Location History

The ability to see the history of inventory locations has been added so if something is not in its current location the last location can be checked.

This can be viewed wherever inventory is accessed for example when adding inventory to a customer order.

HUNTSVILLE, AL 35811  
County: MADISON

Changing Customer Order Line - Invoice WH009093

Item Inventory

Search 27945 OCTAGON & DOT FIELD TILE 2X2 - 12X12 MATTE WHITE W/ WHT DOT PC:06

Store	PC	Item Number	Name	Description	Run Lot
100	06	27945	OCTAGON & DOT FIELD	MATTE WHITE W/ WHT D	19

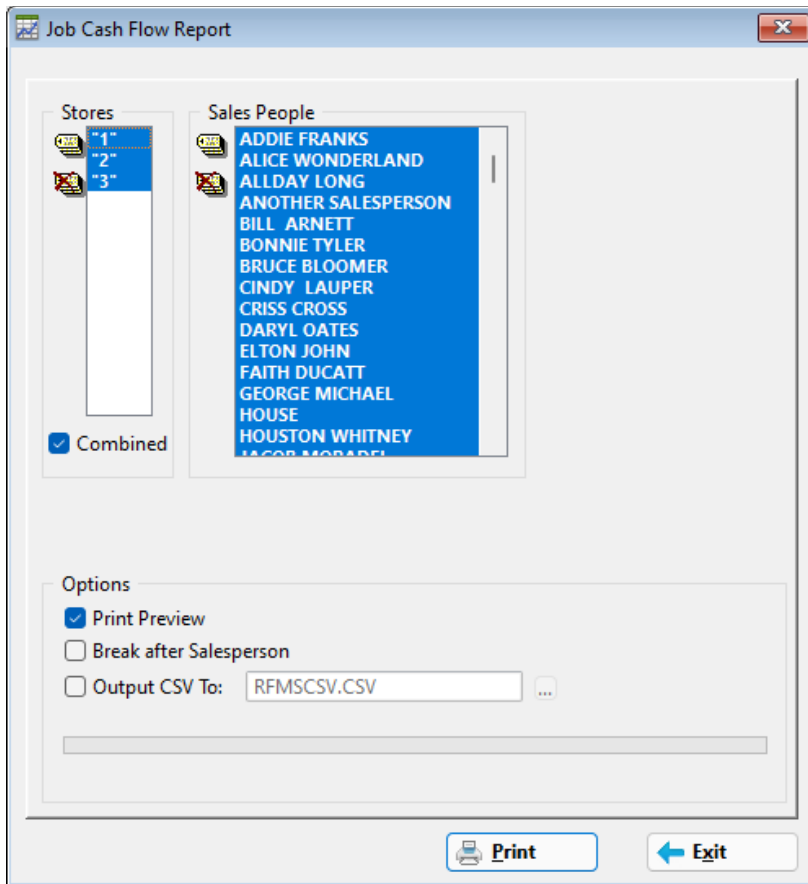
Location History

Location	Since
T-2	11/6/2019 6:00 PM

Price \$3.45

# Sales Reports

## Job Cash Flow Report



This recently added report has been adjusted to:

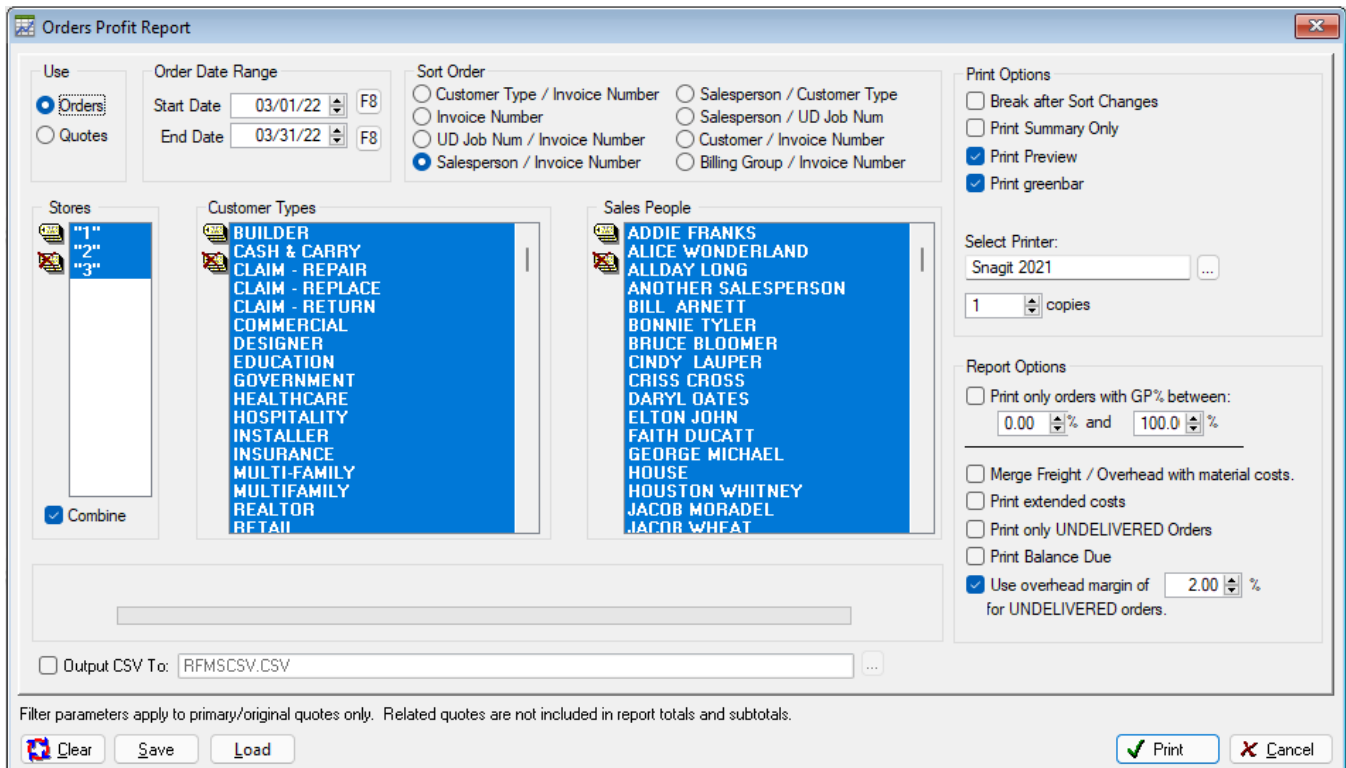
- Capture all un job costed orders, not just everything with a balance.
- Summarize the material lines from different orders based on ship to name

Page No: 1  
03/02/22  
10:58AM

Job Cash Flow  
Store Location 100

	Budget Sales	Budget Cost	Requisition	Bal To Bill	Mat'l Cost To Date	Labor Cost To Date	Projected Cost	Payment	Cash Flow
Sales for: FRED LOVE									
Overall Summary	7,025.96	4,500.00	4,500.00	4,500.00	1,185.00	0.00	2,315.00	0.00	-1,130.00
Sold To: WALTERS CONSTRUCTION, ROBERT									
CARBIN, FRANK WH009093	633.00	77.01	633.00	0.00	77.01	0.00	0.00	0.00	-77.01
WALTERS CONSTRUCTION, ROBERT WH009039	803.19	135.39	712.80	90.39	73.88	0.00	61.51	0.00	-73.88
<b>Total WALTERS CONSTRUCTION, ROBERT</b>	<b>1,436.19</b>	<b>212.40</b>	<b>1,345.80</b>	<b>90.39</b>	<b>150.89</b>	<b>0.00</b>	<b>61.51</b>	<b>0.00</b>	<b>-150.89</b>
Subtotal for: FRED LOVE	11,492.32	5,986.96	7,366.84	4,125.48	3,361.38	0.00	2,625.58	0.00	-3,361.38
Grand Total for Store 100	11,492.32	5,986.96	7,366.84	4,125.48	3,361.38	0.00	2,625.58	0.00	-3,361.38

# Orders Quotes Profit Report



This report now has the option to include referral costs in with the service column of the orders report.

This new check box is a sticky setting that applies to both Delivered and Undelivered.

If "Include Referral Costs in Service Column" is checked, Referral Costs will be included in the "Cost" field of the "Inst Svc" column.

3/03/2022 12:34 PM

**Orders Profit Report**  
From: 03/03/22 To: 03/03/22  
For All Stores

Order Number	Order Date	Customer Name		Material Sale/Cost	Inst Svc Sale/Cost	Misc Charge	Fit+OH+ Load + Use Tax	Net Sale/Cost	Gross Profit	Gross Profit %	Order Total
<b>Sales for WHOLESALE</b>											
WH009094	03/03/22	ABSHIRE, KAREN		Sale: 166.10 Cost: 99.90	Sale: 0.00 Cost: 8.31	0.00	4.71	166.10 112.92	\$53.18	32.02%	182.71
<b>Subtotals for WHOLESALE</b>				Sale: 166.10 Cost: 99.90	Sale: 0.00 Cost: 8.31	0.00	4.71	166.10 112.92	53.18	32.02%	182.71
1 Orders, Avg \$182.7											
<b>Grand Totals</b>											
1 Orders, Avg \$182.7				Sale: 166.10 Cost: 99.90	Sale: 0.00 Cost: 8.31	0.00	4.71	166.10 112.92	53.18	32.02%	182.71

CSV Output will have a separate column for Referral Costs. Referral Costs will not be included with the Labor Costs.

A	B	C	D	E	F	G	H	I	J	K	L	M	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL
Store	IsWritten	Customer	Ship-To N	Salespers	Amounts	Inv_Num	Inv_Date	Cust_Nam	Del_Date	Material	MiscInst	MiscCharg	LaborCost	ReferralCost	LineTotal	ProfPerc	HasZeroC	FreightAn	IsDelivere	BalanceD	BillGroup	BillGroup
100	1	WHOLESALE	TRENT PAI	Not Split	WH009094	20220303	ABSHIRE, I			166.1	0	0	0	8.31	0	0	0	4.71		182.71		0

Since the Referral Costs are coming from the Referral Tracing tables or the Provider records, it is possible that the line Referral Costs will not match the Total Referral Costs being represented. This can happen if the Referral Costs were overridden and locked.

“Referral Tracing” must be turned on.

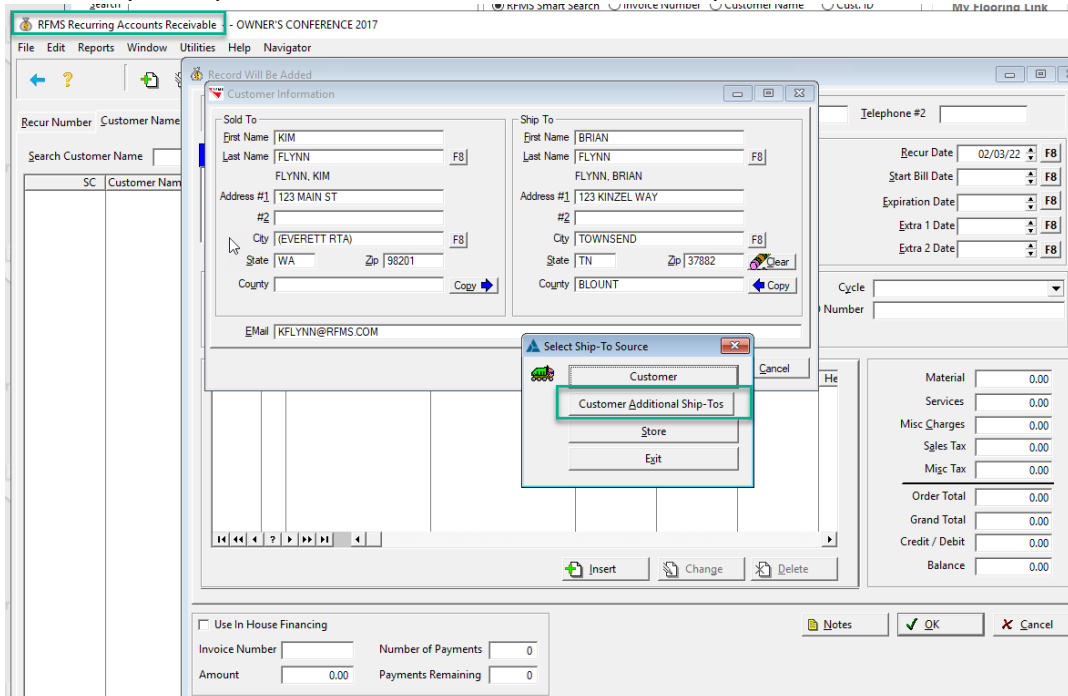
“Include Referrals in Job Costed Analysis” must be turned on.

Orders that were created and/or job costed with these either of these switches turned off, may not calculate the referrals correctly on this report.

# Accounting

## Recurring AR

The ability to import from the Customer Additional Ship To window has been added.



# Human Resources

The ability to print a signature line on a payroll check has been added.

The screenshot shows the 'Payroll Check Format' dialog box. At the top, there are options for 'Check Form Size' (8 1/2" x 7" and 8 1/2" x 11") and 'Check Position' (Top, Middle, Bottom). The 'Signature Line' section is highlighted with a red box and contains a 'Print Signature Line' checkbox and two input fields for X and Y coordinates (4,969 and 2,875). Other sections include 'Dollars & Cents', 'Company Information', 'Bank Name', 'MICR', and 'Fractional Routing Number'. At the bottom, there are buttons for 'Set Default', 'Print Example', 'Save', and 'Abandon'. A note at the bottom states: 'X and Y coordinates are in thousandths of an inch. X is measured from the left, Y is measured from the top. Thus, 3.5 inches from the left would be X = 3500'.

## 941 for Second Quarter 2022

[Form 941 \(Rev. June 2022\) \(irs.gov\)](https://www.irs.gov/efile/form941)

The 941 second quarter report for 2022 is included in this update version 22.0.3.

## 941 Number of Employees

Federal Form 941 Line 1 asks for the number of employees who were paid wage items for the specific pay period that includes the 12th day of the 3rd month of the quarter. These dates are March 12, June 12, September 12, and December 12. RFMS has been adjusted to use this method for calculating line 1.

# E-Commerce

The following material classification options have been added.

Material Classification Setup									
To assign a product code to a material classification code, click the PC column and assign a product code									
Supplier	RES/COM	Class	Class	SClass	Sub-Class	PC	Prod Code Desc	Seq #	R/C
UNIVERSAL	Residential	WOO	Wood	999	Defaults - 3 Digit Classificat	07	HARDWOOD	10,816	0
UNIVERSAL	Residential	CON	Concrete					17,516	0
UNIVERSAL	Commercial	CON	Concrete					17,517	1
UNIVERSAL	Residential	CON	Concrete	EPO	Epoxy			17,518	0
UNIVERSAL	Commercial	CON	Concrete	EPO	Epoxy			17,519	1
UNIVERSAL	Residential	CON	Concrete	STN	Stained			17,520	0
UNIVERSAL	Commercial	CON	Concrete	STN	Stained			17,521	1
UNIVERSAL	Residential	CON	Concrete	POL	Polished			17,522	0
UNIVERSAL	Commercial	CON	Concrete	POL	Polished			17,523	1
UNIVERSAL	Residential	INS	Installation Materials	BKB	Backerboard			17,524	0
UNIVERSAL	Commercial	INS	Installation Materials	BKB	Backerboard			17,525	1
UNIVERSAL	Residential	INS	Installation Materials	CLK	Caulk			17,526	0
UNIVERSAL	Commercial	INS	Installation Materials	CLK	Caulk			17,527	1
UNIVERSAL	Residential	INS	Installation Materials	PRO	Profiles			17,528	0
UNIVERSAL	Commercial	INS	Installation Materials	PRO	Profiles			17,529	1
UNIVERSAL	Residential	INS	Installation Materials	SHC	Shower Components			17,530	0
UNIVERSAL	Commercial	INS	Installation Materials	SHC	Shower Components			17,531	1
UNIVERSAL	Residential	INS	Installation Materials	THM	Thinset/Mortar			17,532	0
UNIVERSAL	Commercial	INS	Installation Materials	THM	Thinset/Mortar			17,533	1
UNIVERSAL	Residential	INS	Installation Materials	TSC	Tile and Stone Care			17,534	0
UNIVERSAL	Commercial	INS	Installation Materials	TSC	Tile and Stone Care			17,535	1
UNIVERSAL	Residential	INS	Installation Materials	WCI	Waterproof Crack Iso			17,536	0
UNIVERSAL	Commercial	INS	Installation Materials	WCI	Waterproof Crack Iso			17,537	1
UNIVERSAL	Residential	CAR	Carpet	999	Defaults - 3 Digit Classificat	01	CARPET	17,538	0
UNIVERSAL	Residential	CON	Concrete	999	Defaults - 3 Digit Classificat			17,539	0

Concrete

EPO Epoxy

STN Stained

POL Polished

Installation Material

BackerBoard

Caulk

Floor Heat

Profiles

Shower Components

Thinset/Mortar

Tile Stone Care

Waterproof Crack ISO

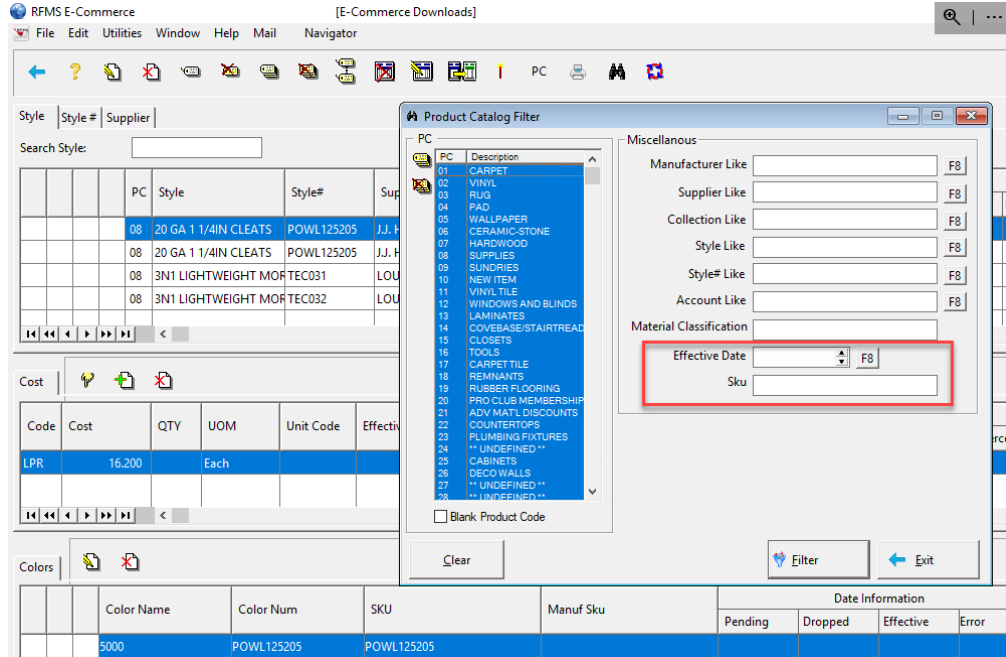
## Product Count

The record count now displays both total records and filtered amount.

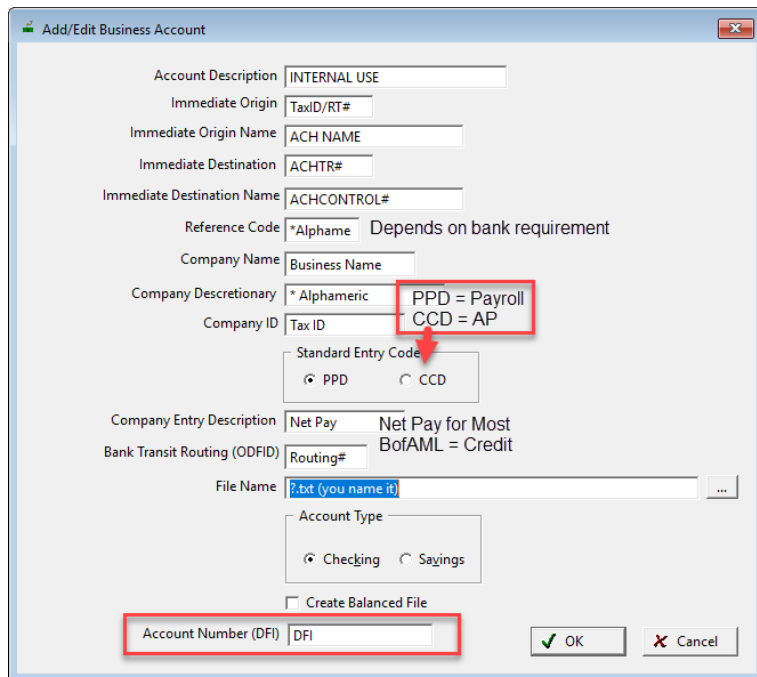
Style   Style #   Supplier																	
Search Style: <input type="text"/>																	
	PC	Style	Style#	Supplier	Manuf	Standard Dimension	Date Information				Manuf Style	Pricing Group	Manuf Style#	Backing	Size Code	Buying Group	Contr
							Effective	Dropped	Pending	Error							
	08	20 GA 1 1/4IN CLEATS	POWL125205	J.J. HAINES COMPANY	POWERNAIL CO.		7/05/2021					POWL125205					
	08	20 GA 1 1/4IN CLEATS	POWL125205	J.J. HAINES COMPANY	POWERNAIL CO.		7/05/2021					POWL125205					
	08	3M LIGHTWEIGHT MDP	TEC031	LOUISVILLE TILE DIST.	IN TEC		7/05/2021					TEC031					

Total Records: 3637 / Filtered View Count: 1698

## Searching the Product Catalog Download screen now includes SKU and Effective Date



## Direct Deposit



As of version 22.0 the ability to add a bank account number for the balance line detail record. See DFI field. This is optional but required by certain banks.

# API

Version 1 of the RFMS API is approaching end of life. **After March 31st, 2022 RFMS will no longer provide support to the version 1 API.** Please know if you come across an issue or problem, we will not be able to provide any assistance.

The good news is **RFMS has developed version 2 of the API.** This new version was developed to provide high reliability, better performance, and tighter security.

Please take the appropriate steps to complete development efforts to move from v1 to v2 as soon as possible. If you have a software vendor that requires the RFMS API, please contact them to verify that their software currently supports v2 or that they will support it by the end of March 2022.

Documentation for v2 is available at <https://api2docs.rfms.online>.