



How Can RFMS Smart Search Work For YOU?

More is BETER!!!

- Tell us more! Type everything you know, just start typing it in
 - RFMS can help you find things the way you are thinking...tell us what you want to find.....just fill it in so we can go find if for you
 - Example: Customers first name, street or city, phone number etc
- Avoid pulling up only “noisy” searches where you get a LOT of information to scroll through...narrow it down
 - Noisy search is when too much information is displayed creates a lot of unnecessary “noise” or data that is harder to find results by scrolling through a lot of information. Makes you, your computer and server work too hard
- Combine your searches....
 - Not just looking for the order# or the customer name or the ship to name... its **ALL of them combined at once!**
 - Example: start with Name then add phone# or street name or city



“Where did everything go?”



- Why did this happen?
 - The goal is to display a smaller list
 - Keeps server from working so hard and helps prevent slow downs
 - Less scrolling
- “But I miss the old way of doing things!”
 - It will require a change to how you think of searching,
 - Awkward at first because it’s different
 - You have “muscle memory” of how you do things now and this will be harder at first
 - Once you get the hang of it, makes searching faster and easier

Fields Searched


Click on this link for the latest update on fields

<https://rfmsinc.zendesk.com/hc/en-us/articles/218333627-RFMS-Smart-Search-Fields>



Orders/Quotes/Claims				
Customer Name	Job Name	Invoice #	Telephone 1	
Customer Address 1	Job Address 1	Job # /ID	PO #	
Sold To City				
Customer from Customer Browse				
Customer Name	Ship Name	Customer #	Telephone 1	
Sold-To Business	Ship-To Business	Relationship	Email	
Customer Address 1	Ship Address 1			
Sold-To City				
Rolls from Order Entry				
Style	Product Code*	Sidemark	Supplier	
Color	Roll #	Comments	A/P Invoice #	
Style #	PO #			
Color #				
Items from Order Entry				
Item Name	Product Code*	Sidemark	Supplier	System Reference #
Description	Item #	Comments	A/P Invoice	Serial # Prompt
	PO #			
Combined Inventory (Simple Browse) from Order Entry				
Style/Item #	Product Code*		Supplier	
Color/Description	Roll #/Item #			
Style/Item #	PO #			

General Tips

- **Just start typing-** don't have to click into field to add more words just keep typing
- **And-Spaces** between words are kind of like and
 - Example **Sam Smith** will find **Sam** and **Smith**
- **Exact Search-** Use the | character (above the \ key)
 - Example: **|Sam Smith| Main Street** search will look for anything that has **S-a-m-(space)-S-m-i-t-h** exactly. The other words will search as normally would by showing **Main** or **Street** in any field
- Search by **Product Code- PC:06**
 - "PC:" then the product code "01" or "02" or "03" etc
- **Advanced Search** → Binoculars 
- **Sort Results**
 - Click on the Column to sort by that column
 - Sort two Columns → Sub-Sort (Ctrl-Click)

Search

Store	Order No[+2]	Delivered	Customer Name[+1]
**	CG100918	06/21/01	SMITH, GAIL
**	CG100918	06/21/01	SMITH, GAIL

Use Your Buttons

- Radio Buttons

- select default
- Selection is “sticky” or will be remembered

- Smart Search Invoice Number Customer Name Telephone 1

- VCR Buttons.... 

- Display the first record- previous page-previous record
- Display the last record- previous page- previous record



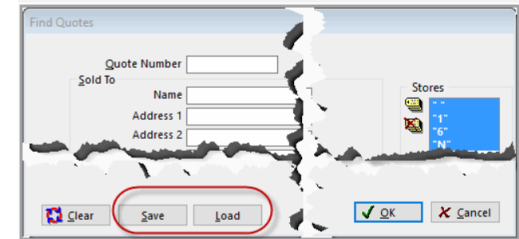


- System Option - Save/Restore Last Order
Browse Sort-Search by the word sort in the
System Option Area.

Using the Binoculars



- Save/Load <https://rfmsinc.zendesk.com/hc/en-us/articles/217967458-Saving-Filters-on-the-Find-Screen>
 - Set up filters you use everyday
 - Save them to load easily
 - Right click from Binoculars to pick one



- Dates <https://rfmsinc.zendesk.com/hc/en-us/articles/218452297-Dates-on-the-Find-Screen>
 - Date range selected (from/to) for a day, month, 2 months, year etc will roll over when to the next range when the date is met.

– Example for a month: Set for March

the filter will automatically update to 4/1/16

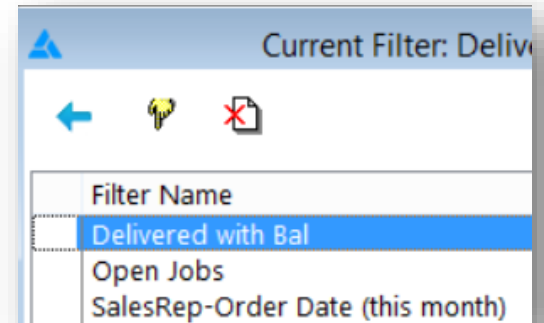


on April 1st

- Static List <https://rfmsinc.zendesk.com/hc/en-us/articles/218439738-Create-a-Static-List>
 - Select the Static List option to keep orders on the screen even if something changes that normally not meet the criteria filtered so this will keep them from disappearing from the browse screen.
- Percent Sign
 - % **before** the text to search means find it **anywhere**
 - % **after** the text to search for means **start with**
- CG6%-
 - A good way to search for the latest Order Numbers. Type in the first 3 or 4 digits of the latest Orders, then you can sort by ascending order (+) where the oldest will be on top or descending order (-) where the newest will be on top.

Recommended Filters to Set Up

- By Delivery Date Option
 - Undelivered (Open)
 - Delivered (Monthly, 2 months...)
- By Sales Person
 - (Monthly, 2 Months...)
- By Customer
 - use the Sort and Sub-Sort
- By Balances
 - With Balance
 - Zero Balance Only
- By Dates
 - Yearly
 - Monthly
 - Daily
 - Most Recent



Let's Look at Adding Lines

- What happened to the F8 button?
 - Rolls
 - Items and the AWESOME Item “Number” field
 - Use that SORT and SUB-SORT
 - MORE, MORE, MORE...tell RFMS everything you know.
 - Services





Let's Look at Inventory and Products

- Purchase Orders
 - The only place we look at the Date
- Rolls Inventory
- Item Inventory
- Products Fields
 - Private Style, Private Style Number, Private Color, Product Code

Let's Look at Accounting

- Use the SORT and SUB-SORT
- Make sure you know the fields we are looking for
- Use the FIND if you need an advanced search.





Schedule Pro

RFMS Smart Search:

- Scheduled Job Screen
 - Find and Defaults

If you have more Schedule Pro Questions,
please email me to set up a time.
ssentell@rfms.com



REVIEW FOR YOU

- START WITH RFMS SMART SEARCH
- Less is not More....type EVERYTHING you know.
- Save those filters that you use everyday... Right Click to Load filters quickly
- Use the FIND if you need an advanced search.

AND THE MAIN THING TO REMEMBER IS.....



WE KNOW OUR BABY IS UGLY, BUT THE MORE YOU PLAY WITH IT THE MORE YOU WILL LOVE IT!

