



Systems for Success

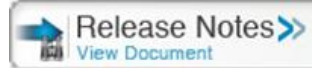
A decorative graphic on the right side of the page, consisting of three overlapping, curved bands. The top band is light gray, the middle band is dark red, and the bottom band is black. The text 'Version 16.1 Update Document' is overlaid on the red and black bands.

Version 16.1
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

webpage. Click the release notes button to find these.







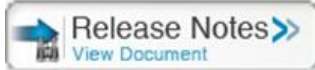
To see what you may have missed in previous updates click here.














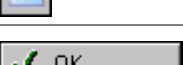
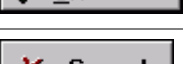








[For directions on loading updates to the RFMS software, click here.](#)

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

Documentation Conventions

 Notes:	Indicates extra Information
	This symbol indicates a best practice, or an example.
<u>Setup</u> >System Setup	Indicates Menu item shortcuts: An underlined letter indicates this is a "hot key". On Main menus click the Alt button plus that key to go directly to that field or function. On Drop Down menus just type that key.
Field Name	Indicates a Field Name or button Name
Important	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.
Links to other topics	Various places in this document have links to other topics in the document. To return to the original topic click Alt + left arrow. Try it out with the link to the left!
User Defined FIELD	RFMS has many fields that can be user defined. In the documentation these will be shown in all capitals with the abbreviation UD before the field name. 
Update Release Notes	Update documents contain only the new features contained the software updates. For all changes see the release notes on the download webpage. Click the release notes button to find these. 

RFMS Button and Menu Conventions

	Exit the current screen. Can also use the Escape key on the keyboard.
	Access the help file. Can also use the F1 Key on the keyboard.
	Activates or selects the highlighted record.
	Add a new record. Can also use the Insert key on the keyboard.
	Make changes to a record.
	Delete a record.
	Add or View Notes on a record.
	View all notes and Client Management Remarks related to a record.
	Find a record using specific fields. Changes to blue when a find is in process.
	Resets a filter to the default settings.
	Refresh the browse without resetting the filters
	Saves the current information and exits the screen.
	Exits the screen without saving the newly entered information.
	Exact match required in a search.
	Partial match only required in a search.
 or Ctrl-S	Text search Reminder: this searches the browse list from the highlighted record down only. When beginning a search it is best to begin at the top of list.
	Print a document or go to a report menu.
	Allows adding, changing or deleting graphic, non-graphic files or web sites.
	Tag Untag Tagall or Un-tagall record(s). Selects records
	View details of a record.
	Send an email or RFMS mail message regarding the highlighted record.


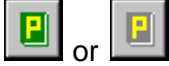
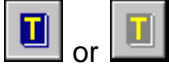


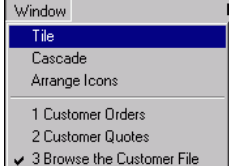



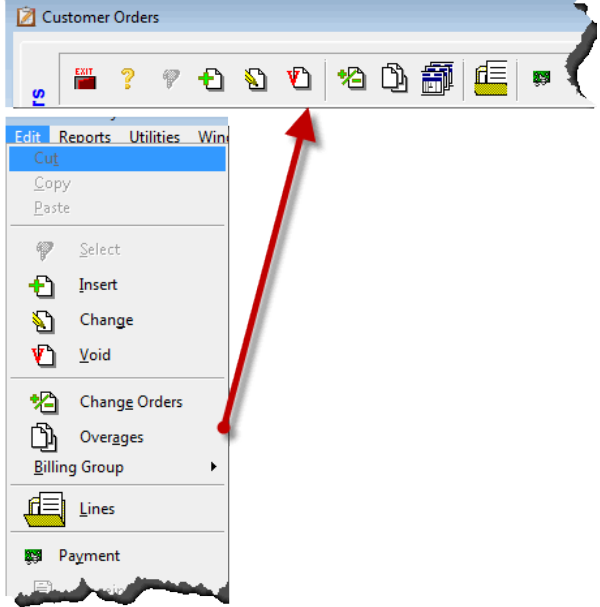
	View the history of a record.
	View the pdf history of reports for the highlighted record.
	Click to view the tracking record created for every record insert made into Orders, Quotes and Bid Pro Estimates. If gray, no records are present.
	Brings up the Client Management remote actions screen and allows 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 date fields in RFMS, hit the D 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 F8 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>>Utilities>System Options>System Wide>General >(Set Up Global Interface System Options or Override Global Interface System Options)</i>
	Required Field. If set in <i>>Utilities>System Options>System Wide>General >(Set Up Global Interface System Options or Override Global Interface System Options)</i>
<p data-bbox="159 1381 289 1413">Edit Menu</p>	<p data-bbox="407 1056 1230 1087">The Edit Menu can be used as a shortcut to the toolbar options.</p> <p data-bbox="407 1094 500 1125">>Edit></p> 

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System Wide

Exit Button

The Exit button has been changed to a blue arrow  .

RFMS Smart Search

RFMS has added the ability to search by typing in keywords and numbers in the Search field and hitting tab. This change will make it easier to find only the information you want and need. This change effects Order Entry, Products, Inventory, Accounting and Schedule Pro.

For additional information and tips, click [here](#).

Password

The key code to enter and exit password mode has changed to **Ctrl-Alt-F6**. Users were accidentally hitting F6 and not realizing they were in set password mode and thinking they were locked up. If using Enterprise Manager and you press this combination of keys and do NOT have the RFMS Admin role the system will not enter set role mode.

Recurring Notes

Users can now tag multiple notes to import. The notes are imported in the order they are tagged.

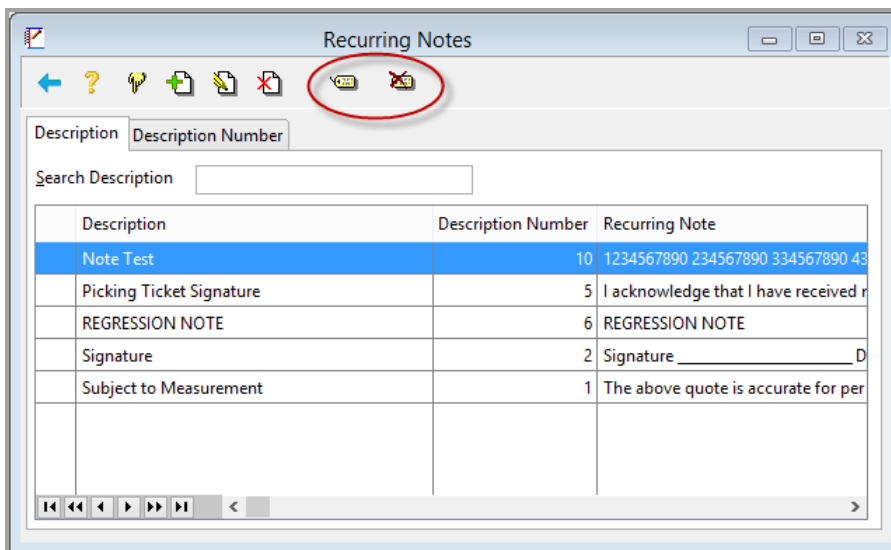


Figure Recurring Notes screen

The format of words in the Recurring Notes are now saved. For example, if you use a different font or color for the words in the notes. (Version 16.1.2)

Email

The email system is now compatible with TLS 1.2.

System Options

Order Entry

Allow EMV Credit Card processing

x>Utilities>System Options>Order Entry>Order Entry Category Configuration

Type- Can be Global, Assigned or User

Setting this system option to Yes allows the user to accept EMV Credit Cards.



Notes:

With EMV, we do not know the type of credit card (Visa, MasterCard, Discover, AMEX, etc.) until after the EMV terminal processes it. Thus, there is a possibility that the Credit Card Config does not have a Receipt Sequence for the processed card. The search for the proper Receipt Sequence will proceed in the following order. When it finds a qualifying sequence it will post to that one.

- Post using the regular credit card search
- Post to a sequence for the Store
- Post to a sequence where there are postings for the Store
- Post to the first active sequence

Automatically Add Extra Commissions to a New Order

x>Utilities>System Options>Order Entry>Order Entry Category Configuration

Type-Can be Global, Assigned or User

By setting this system option to Yes, all extra commissions for the Order are added when the Order is added. If it is set to no, then the Import Commissions button must be used to pull the Additional Commissions over to the order.

Install Store System Options

These two new system options are related to the Inventory Move module – specifically to the Requested Inventory Feature.

Always Show Install Store

x>Utilities>System Options>Order Entry>Order Entry Category Configuration

Type- Can be Global, Assigned or User

Enabling this option will keep the "Install Store" visible with every Order whether it has a Requested Store or not.

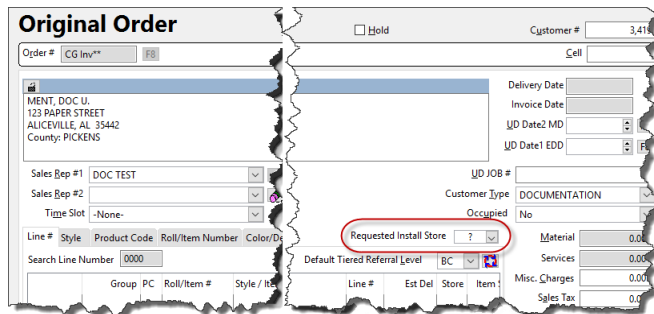
Require Specify Install Store (no automatic default)

x>Utilities>System Options>Order Entry>Order Entry Category Configuration

Type- Can be Global, Assigned or User

This option will be grayed out unless *Always Show Install Store* is set to Yes.

This is for new Orders only. When this System Option is enabled, Install Store will start as "?" which will force the user to specify an Install Store from the drop-down list. This is to prevent users for accepting the default store accidentally



The screenshot shows the 'Original Order' form. The 'Requested Install Store' dropdown menu is highlighted with a red circle and contains a question mark '?'. Other fields visible include Order # (CG Inv**), Customer # (3,411), Delivery Date, Invoice Date, UD Date2 MD, UD Date1 EDD, Sales Rep #1 (DOC TEST), Sales Rep #2, Time Slot (-None-), UD JOB #, Customer Type (DOCUMENTATION), Occupied (No), Material (0.00), Services (0.00), Misc. Charges (0.00), and Sales Tax (0.00). The form also includes a search line number field (0000) and a default tiered referral level dropdown (BC).

Figure Requested Install Store on Order

Prevent Picking Ticket from Printing if Customer is Over Credit Limit

x>Utilities>System Options>Order Entry>Order Entry Category Configuration

Type- Can be Global, Assigned or User

When this option is set to yes, an order can be enter over the credit limit if Automatic Credit check is turned off, but the order will not allow the picking ticket to be printed if it is over the limit.

Setup Sales Tax Accounting

x>Utilities>System Options>Order Entry>Order Entry Category Configuration

Type- Must be Global 🚫

"Setup Sales Tax Accounting" is a new System Option which will have Sales Tax posted directly to Sales Tax Payable instead of Sales Tax Expense. The starting date for this change will be the first day of the next month greater than the value of latest Delivery Date. This change will be permanent.

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

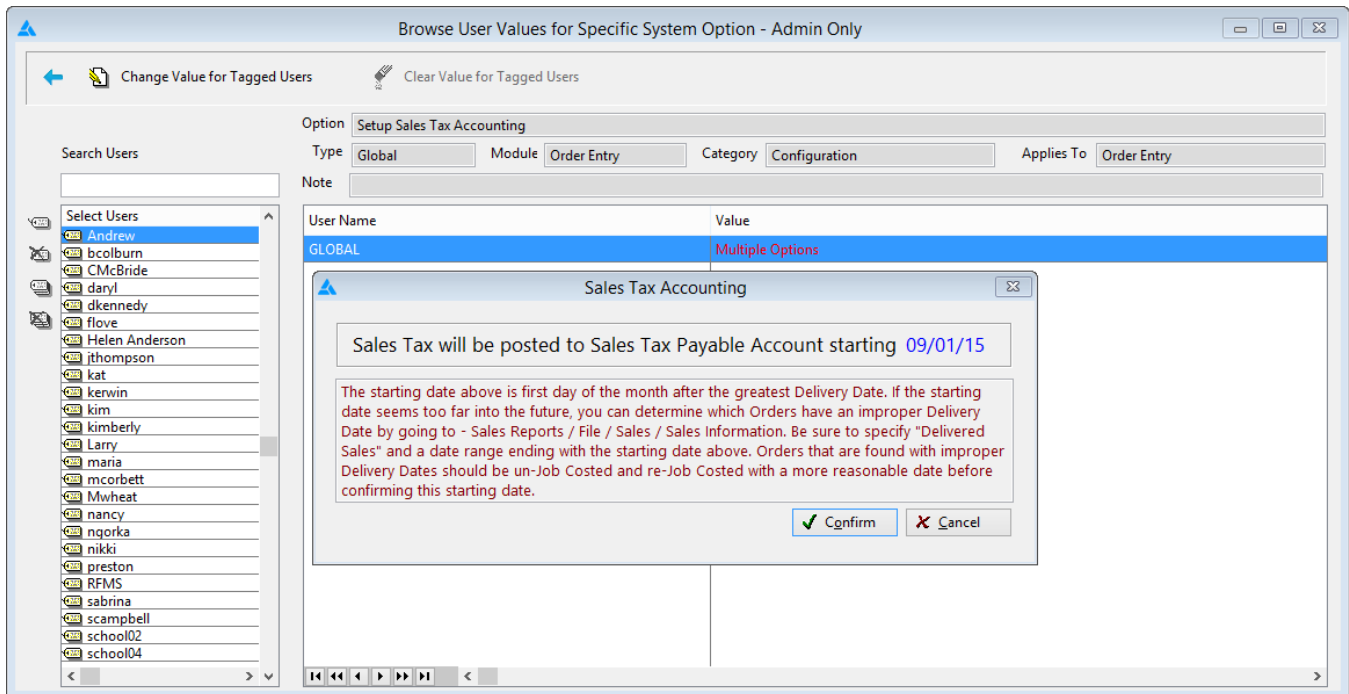


Figure Setup Sales Tax Accounting System Option Screen

Default Customer Contact Values for Mailing and/or Calls

*x>Utilities>System Options>Order Entry>Order Entry
Category Default Values*

Type- Can be Global, Assigned or User

This option sets up the default value for “Mailings Allowed” and “Calls Allowed” under the Additional Information tab in Customers when a new customer record is created.

The screenshot shows the 'Changing a Customer Record' dialog box with the 'Additional Information' tab selected. The 'Mailings Allowed' and 'Calls Allowed' checkboxes are highlighted with red arrows pointing to the 'Additional Information' tab label. The 'Print Invoice when Batch Job Costing' checkbox is checked. The 'Level Discount' section is visible, along with 'Last Order Date' and 'Last Delivery Date' fields.

The choices are

- Do Not Allow Mailings or Calls-Neither box will be checked
- Allow Mailings-Mailing Allowed box will be checked
- Allow Calls-Calls Allowed box will be checked
- Allow Mailing and Calls-Both boxes will be checked.

Restrict Tax Editing

*x>Utilities>System Options>Order Entry>Order Entry
Category-Configuration*

Type-Can be Global, Assigned or User

If this System Option is set to Yes, then the Sales and Miscellaneous (Misc.) Tax will not be editable. Additionally, the Lock Tax checkbox will be hidden.

Restrict Work Order Rate Editing

*x>Utilities>System Options>Order Entry>Order Entry
Category-Configuration*

Type-Can be Global, Assigned or User

If this system option is set to Yes, then rate and total fields are cleared. This means that no changes can be made to these fields.

Require Ship-To City From City List

*>Utilities>System Options>Order Entry>Order Entry
Category-Configuration*

Type- Can be Global, Assigned or User

When this system option is set to yes, a valid Ship-To City will be required before an order can be saved.

Save/Restore Last Order Browse Sort

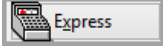
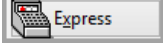
*>Utilities>System Options>Order Entry>Order Entry
Category-Configuration*

Type- Can be Global, Assigned or User

This system option when set to yes will save the last browse sort used in Customer Orders.

Express Printing System Options

Some users had chosen not to allow using Express Checkout because functions could not be limited. The Express processing screen has been changed so that access to certain functions can be limited by system options.

If *Print Express Invoice*, *Print Express Job Cost Sheet* and *Print Express Picking Ticket* are all set to no, then the Express button  in Edit Order will be grayed out. If any of these system options are set to yes then the Express button  is enabled and the section that is set to no will be grayed out.

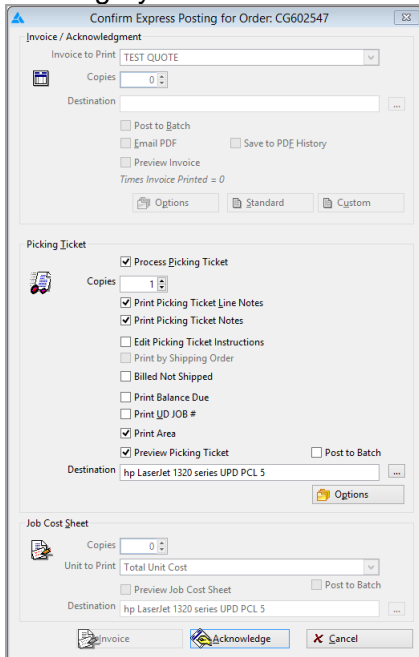
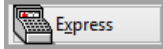


Figure Express Printing Screen

Print Express Invoice

x>Utilities>System Options>Order Entry>Order Entry Category-Reporting

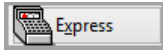
Type-Can be Global, Assigned or User

If set to yes, then when a user clicks the Express button  in Edit Order, the user will be able to print an invoice. If this option is set to no, the Invoice section will be grayed out.

Print Express Job Cost Sheet

x>Utilities>System Options>Order Entry>Order Entry Category-Reporting

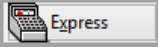
Type-Can be Global, Assigned or User

If set to yes, then when a user clicks the Express button  in Edit Order, the user will be able to print a job cost sheet. If this option is set to no, the Job Cost Sheet section will be grayed out.

Print Express Picking Ticket

*x>Utilities>System Options>Order Entry>Order Entry
Category-Reporting*

Type-Can be Global, Assigned or User

If set to yes, then when a user clicks the Express button  in Edit Order, the user will be able to print a picking ticket. If this option is set to no, the Picking Ticket section will be grayed out.

Inventory

Print Company Logo On Purchase Order

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

Type- Can be Global, Assigned or User

This option gives the ability to print the Company Logo on Standard Purchase Orders.



Notes:

The image comes from the [Company Logo system option](#). (*>UTILITIES>SYSTEM OPTIONS>ORDER ENTRY>INVOICES>Company Logo*)

BidPro

Lock Order Entry Lines when Exporting from BidPro

*x>Utilities>System Options>BidPro>Order Entry
Category-Data Transfer*

Type-Global, Assigned or User

This system option give the ability to lock or not lock exported lines. The values to choose from are

- Never Lock,
- Always Lock Total
- Lock Total if BidPro Line Total Locked
- Always Lock Price
- Lock Price if BidPro Line Total Locked.

Baseline/Financial Progress

Order Entry/Client Management

Financial Progress Screen



This button can be found at the top of the Baseline  screen. It can be viewed for an Order, a Billing Group or a Client Management Project.

This screen allows the user to see a "snapshot" of the order at that moment in time even without a baseline being created.

	Baseline	Delivered	Undelivered	Current	Baseline VS Current Variance
Material Lines Cost	0.00	0.00	481,870.70	481,870.70	481,870.70
Service Lines Cost	0.00	0.00	0.00	0.00	0.00
Actual Service Cost	0.00	0.00	0.00	0.00	0.00
Overhead Cost	0.00	0.00	18,774.18	18,774.18	18,774.18
Freight Cost	0.00	0.00	3.17	3.17	3.17
Load Cost	0.00	0.00	0.00	0.00	0.00
Expenses Cost	0.00	0.00	0.00	0.00	0.00
Use Tax Cost	0.00	0.00	0.00	0.00	0.00
Total Costs	0.00	0.00	500,648.05	500,648.05	500,648.05
Material Sale	0.00	0.00	428,912.80	428,912.80	428,912.80
Labor Sale	0.00	0.00	0.00	0.00	0.00
Misc Charges Sale	0.00	0.00	0.00	0.00	0.00
Net Sale	0.00	0.00	428,912.80	428,912.80	428,912.80
Gross Profit %	0.00%	0.00%	-16.72%	-16.72%	-16.72%
Gross Profit	0.00	0.00	-71,735.25	-71,735.25	-71,735.25
Sales Tax	0.00	0.00	38,602.15	38,602.15	38,602.15
Misc Tax	0.00	0.00	0.00	0.00	0.00
Fees	0.00	0.00	0.67	0.67	0.67
Total	0.00	0.00	467,515.62	467,515.62	467,515.62
Overages Included in Net Sale	0.00	0.00	0.00	0.00	0.00
Add Ons Included in Net Sale	0.00	0.00	0.00	0.00	0.00
Credit Memos Included in Net Sale	0.00	0.00	0.00	0.00	0.00

Payment Information	
Current Total	467,515.62
Delivered	0.00
Retainage	0.00
Payments	-466,520.98
Discounts	0.00
Finance Charges	0.00
Current Balance	-466,520.98
Total Balance	994.64
Baseline Date	<input type="text"/>

Note: Payment Information includes amounts for Orders and the related Add Ons, Credit Memos and Overages.

Figure Financial Progress Screen

Notes on Baseline and Financial Progress

- Only the appropriate functions will display on the screen based on if the user enters from Order, Billing Group or Commercial Project Manager.
- A Baseline does not need to be created to view this screen
- It includes Original Orders and their related Change Orders, Overages, Add Ons and Credit Memos.
- Change Orders will never be included in the Baseline.
- The Baseline plus the Change Orders do not always add up to the current total. Users can change the original order the baseline was created on.
- Billing Group Change Orders Column only displays when viewing in Billing Groups
- Service Line Cost is based on Service Lines. Actual Service Cost is based on Provider Records.
- Expenses are broken out into material, service, overhead, freight, load, expenses and use tax.

- Sales are broken out into material, service and miscellaneous charges.
- Payment Information includes Delivered, Retainage, Payments, Discounts and Balance Due.
- Finance Charges are included in the Current Balance and Total Balance in the Payment Information.
- Claims are NOT included.
- If the Gross Profit is Negative, then it will be displayed in red
- CA Recycle Fees are in the Fees row. Total posted includes the CA Recycle Fees.
- Add Ons, Credit Memos and Overages display separately at the bottom.
- A warning message will display if the order is part of a Billing Group before opening the Baseline/Financial Progress screen.

Password Protect

The password for this button on the Billing Groups screen and in Commercial Project Manager will be picked up from the password set on the Browse Orders screen.

Financial Progress Reports

The ability to print Financial Progress Reports have been added to the Baseline screen.

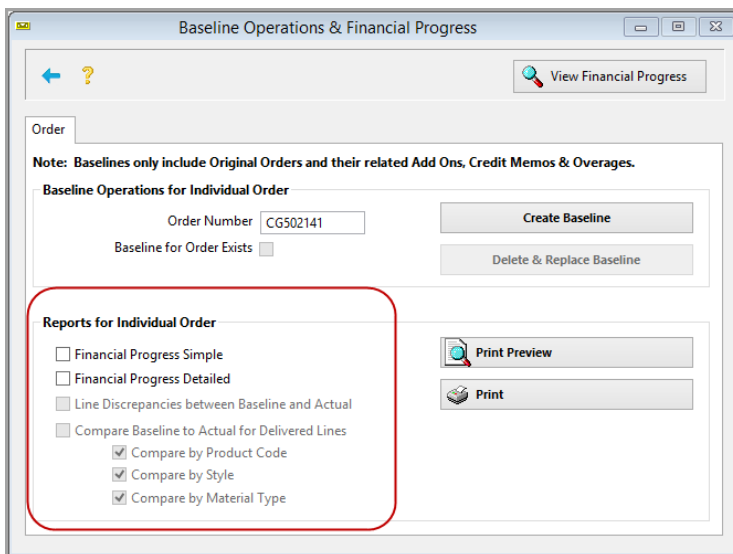


Figure Baseline Screen

Financial Progress Simple

In this report, the costs and sales are not broken out in detail and Change Orders are not shown in their own columns.

Financial Progress Report for Order						Order Number: CG502141	
						Baseline Created:	
	Baseline	Delivered	Undelivered	Current	Variance	Payment Information	
Original Orders	0.00	0.00	0.00%	267.60	267.60	267.60	
Change Orders	0.00	0.00	0.00%	0.00	0.00	0.00	
Total	0.00	0.00	0.00%	267.60	267.60	267.60	
Material Lines Cost	0.00	0.00	0.00%	4,000.00	4,000.00	4,000.00	
Service Lines Cost	0.00	0.00	0.00%	0.00	0.00	0.00	
Other Costs	0.00	0.00		609.84	609.84	609.84	
Total Costs	0.00	0.00		4,609.84	4,609.84	4,609.84	
Gross Profit %	0.00%	0.00%	-100.00%	-100.00%	-100.00%		
Gross Profit	0.00	0.00	-4,342.24	-4,342.24	-4,342.24		
Net Sale	0.00	0.00	267.60	267.60	267.60		
Tax Liability & Fees	0.00	0.00	0.00	0.00	0.00		
Total	0.00	0.00	267.60	267.60	267.60		
						Original Orders	267.60
						Change Orders	0.00
						Total	267.60
						Delivered	0.00
						Retainage	0.00
						Payments & Discounts	-267.60
						Finance Charges	0.00
						Current Balance	-267.60
						Total Balance	0.00

Note: Other Costs include Overhead, Freight, Load, Expense and Use Tax.

Note: Both Original and Change Orders include their related Add Ons, Credit Memos and Overages.

01/12/16

Figure Financial Progress Simple Preview

Financial Progress Detailed

Detailed Financial Progress Report for Order						Order Number: CG502130		
						Baseline Created: 01/12/16		
	Baseline	Delivered	Undelivered	Current	Variance	Payment Information		
Material Lines Cost	2,888.00	0.00	0.00%	2,888.00	2,888.00	0.00	Current Total	5,288.03
Service Lines Cost	0.00	0.00	0.00%	0.00	0.00	0.00	Delivered	0.00
Actual Service Cost	0.00	0.00		0.00	0.00	0.00	Retainage	0.00
Overhead Cost	112.51	0.00		112.51	112.51	0.00	Payments	-3,262.81
Freight Cost	0.70	0.00		0.70	0.70	0.00	Discounts	155.00
Load Cost	0.00	0.00		0.00	0.00	0.00	Finance Charges	0.00
Expenses Cost	0.00	0.00		0.00	0.00	0.00	Current Balance	-3,107.81
Use Tax Cost	0.00	0.00		0.00	0.00	0.00	Total Balance	2,180.22
Total Costs	3,001.21	0.00		3,001.21	3,001.21	0.00		
Gross Profit %	-5.25%	0.00%	38.14%	38.14%	43.39%			
Gross Profit	-149.81	0.00	1,850.19	1,850.19	2,000.00			
Misc Charges	0.00	0.00	0.00	0.00	0.00			
Net Sale	2,851.40	0.00	4,851.40	4,851.40	2,000.00			
Sales Tax	256.63	0.00	436.63	436.63	180.00			
Misc Tax	0.00	0.00	0.00	0.00	0.00			
CA Fee	0.00	0.00	0.00	0.00	0.00			
Total	3,108.03	0.00	0.00%	5,288.03	5,288.03	2,180.00		
Net Sale Includes the Overages, Add Ons and Credit Memos								
Overages	0.00	0.00		0.00	0.00	0.00		
Add Ons	0.00	0.00		0.00	0.00	0.00		
Credit Memos	0.00	0.00		0.00	0.00	0.00		

01/12/16

Order Entry

Backup Warning Message

This following now appears when opening Order Entry to inform the user of the date of the last data backup. As the time from the last backup increases so does the number of times you have to hit ok.

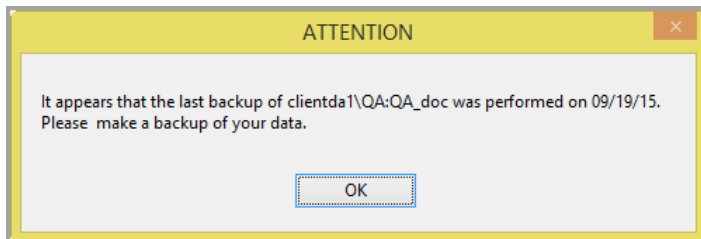


Figure Backup Warning Message



RFMS recommends a SQL Maintenance Plan to be performed on both (Full DB Backup and Transaction Log Backup if set to full recovery model) to ensure proper backups. Backups must be tested and verified with SQL Maintenance Plan Backups, RFMS recommends a SQL Maintenance Plan to be performed on both (Full DB Backup and Transaction Log Backup if set to full recovery model) to

ensure proper backups. Backups must be tested and verified with SQL Maintenance Plan Backups, as well as, third party backups. If a third party back up is used, please also use a SQL Maintenance Plan.

Search Options

The user now has the option in Customer Orders and Quotes to use either the RFMS Smart Search, Invoice Number, Customer Name, or Telephone 1 to search. Most clients will want to leave this selection on RFMS Smart Search. Click the appropriate radio button and type in the Search field.

Click the appropriate radio button and type in the Search field



Figure Search Options in Order Entry

Customer Order Browse Screen

Version 16.1.3

Order Balance and Order Total have been added to the end of the Order browse.

Store	Order No.	UD CONTRACT TYPE	UD SERVICE OFFERING	Balance Due	Invoice Total	Sequence	Control
'6'	RD12345			\$4,299.62	\$4,299.62	79,197	RD12345
--	PB000070			\$0.00	\$10,410.56	62,695	PB000070
--	CG902851			\$0.00	\$405.46	71,602	CG902851
--	CG902789			\$0.00	\$125.00	71,540	CG902789
--	CG902774			\$0.00	\$957.89	71,525	CG902774
--	CG902724			\$0.00	\$868.93	71,473	CG902724

Work Orders

Version 16.1.2

A drop-down menu has been added to the Confirm Work Order screen to allow the user to choose to print Default Work Order or the custom one (if it exist).

Find Screen



In Customer Orders and Quotes, the option to save a Find has been added.

Make all the choices on the Find screen.

Click Save and the Save Current Filter screen opens. Type in a File Name.

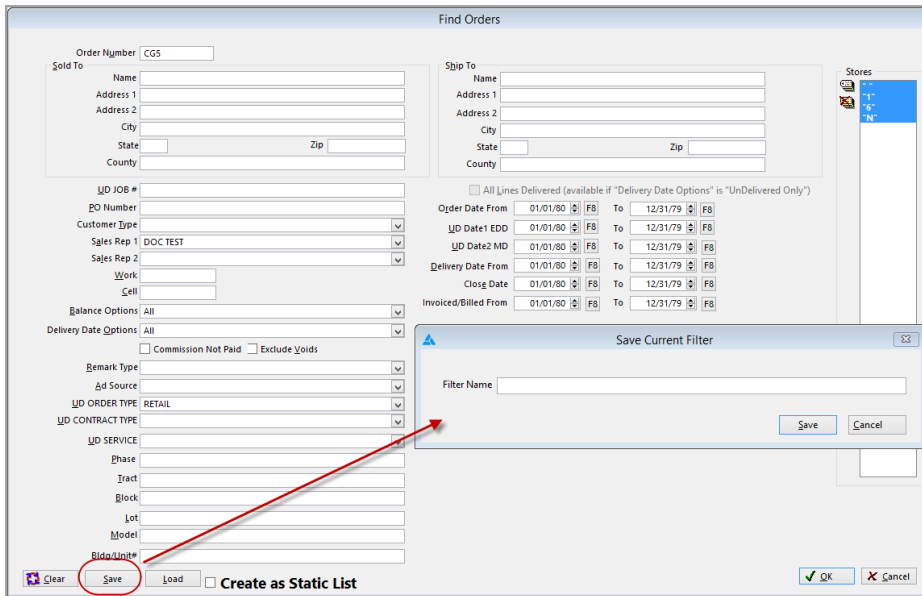



Figure Find Screen-Save

Once a Find has been saved it can be loaded.

Click Load.

The Select Filter screen opens. Highlight the filter and click the Select button .

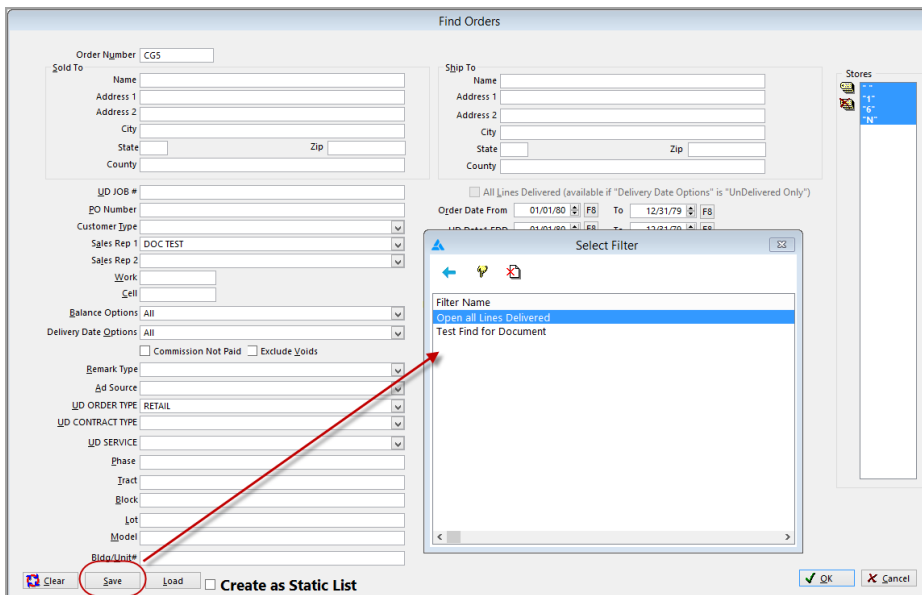
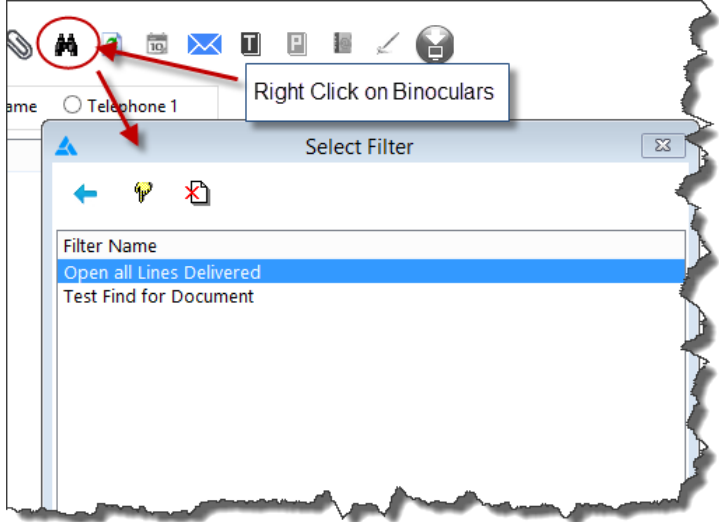


Figure Find Screen-Load

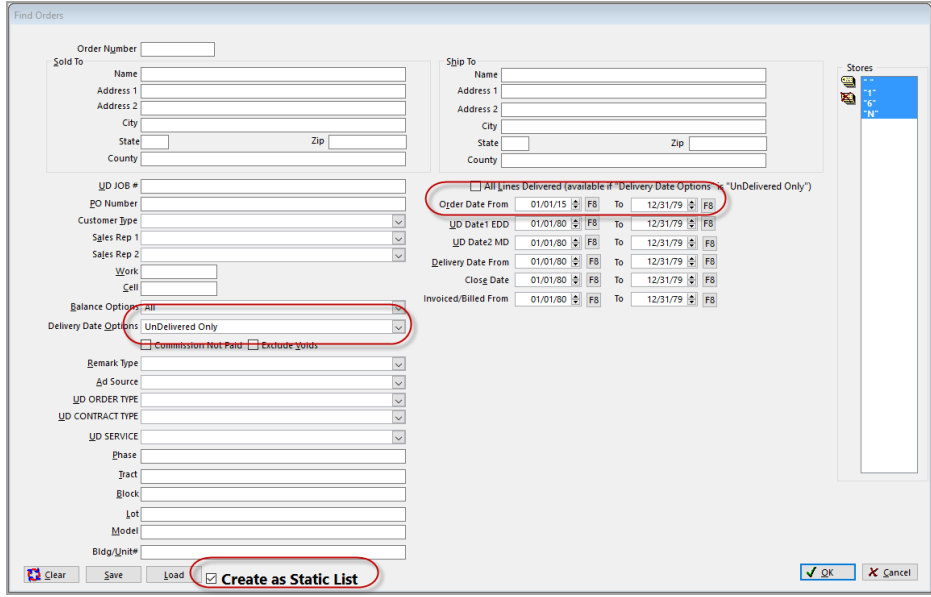


A quicker way to load a saved filter is to right click on the Find button 



Create a Static List

When this is checked, the list on the browse no longer has to meet the Find parameters. For example, if the Find is on Undelivered Orders and while on the browse the order is job costed, the order stays on the browse.



Store	Order No	Delivered	Customer Name	PO Number	Type	UD JOB #	Work	Cell	Ship-To Name
**	CG501944	\$	CUSTOMER LAST, CUSTOMER FIRST	PO PROMISE	Original Order	PO PROMIST	111-222-3333	222-222-3333	
**	CG501948	\$	CUSTOMER LAST, CUSTOMER FIRST		Original Order		111-222-3333	222-222-3333	NUMBER
**	CG501955	\$	OPS CONNECT CUSTOMER		Original Order		205-444-1111	205-333-2222	OPS CONN
**	CG501958	\$	CUSTOMER LAST, CUSTOMER FIRST	BILL	Original Order	BILL	111-222-3333	222-222-3333	
**	CG501960	\$	02/17/16 CUSTOMER LAST, CUSTOMER FIRST		Original Order	ALLOCATOR	111-222-3333	222-222-3333	
**	CG501962	\$	CUSTOMER LAST, CUSTOMER FIRST	AREA	Original Order	MAIN CUSTOMER	111-222-3333	222-222-3333	CUSTOMER
**	CG501963	\$	APLIN, GORDON		Original Order		205-554-1592	205-792-4292	APLIN, GORDON
**	CG501965	\$	MEMBER, NEW		Original Order		317-123-4567		
**	CG501966	\$	CUSTOMER, MAIN		Original Order	MAIN CUSTOMER	205-111-1111		CUSTOMER
**	CG501967	\$	MAIN CUSTOMER		Original Order	MAIN CUSTOMER	205-111-1111		MAIN CUSTOMER
**	CG501968	\$	CUSTOMER PROPERTY		Original Order		205-4600	205-6315	DELIVER

County Field

This field has been increased to 30 characters.

Product

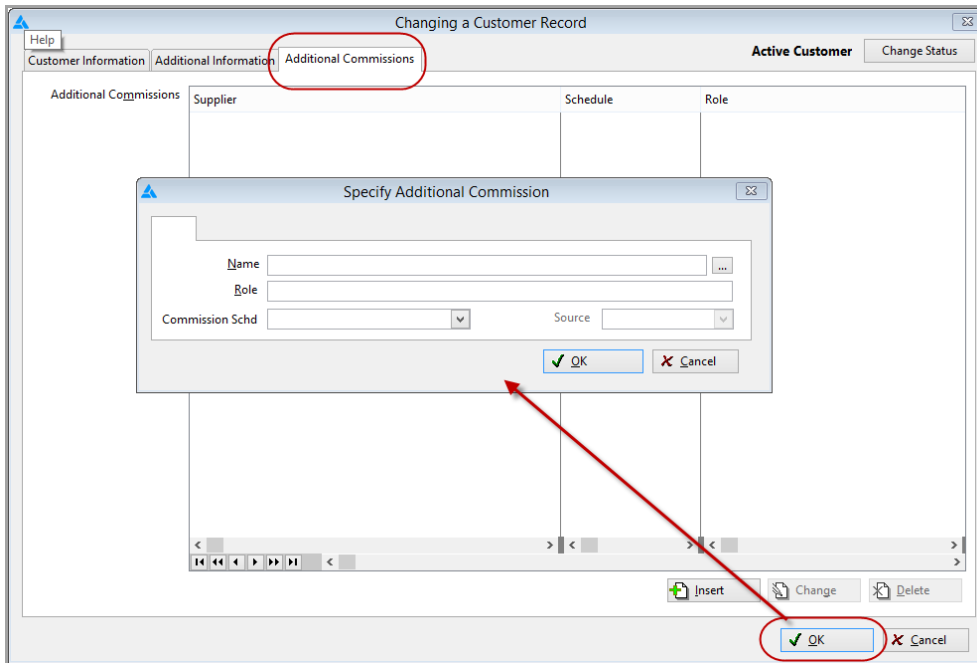
File>Products

The ability to change or delete a color from this screen has been removed.

The Supplier Item Name has been added to the Item Product Filter.

Figure Product Custom Filter Screen

Additional Commissions



The ability to add an additional commission person tied to a customer record has been added.

In addition to the ability to specify additional commissions for each of these types, note the following enhancements:

- Orders, Quotes, and Claims can pull additional commissions from Customer if the Customer Sold-To Name matches the Sold-To Name or Business. The "Import Commissions" button for this feature will not be available until the document has been posted via entering Lines or other transactions.
- Exporting a quote to Order Entry will now copy the additional commissions to the new Order. Appending lines to an order will not copy any additional commissions.

Dashboard

This feature is an "at-a-glance" view of sales information by salesperson. From this screen, you will have Month and Year-to-Date totals displaying for the selected sales representative. In addition, sales goal amounts will display to let you know where each sales person ranks for their projected goals for the year.

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

Customer Orders

Zip Codes

If *City to Cities File Only* is set to yes, the zip code field is the only field the user is allowed to edit.

A city can be set up in the City File with only the first three digits of the zip code if many different zip codes exist for that city and the last 2 digits can be added in the order.

The screenshot shows the 'Order Entry' window with two main sections: 'Customer Information' and 'Ship To'. Both sections have fields for Customer #, First Name, Last Name, Address #1, #2, City, State, Zip, and County. In the 'Customer Information' section, the 'Zip' field is highlighted in yellow and contains the value '354'. In the 'Ship To' section, the 'Zip' field contains '35442'. There are 'Copy' buttons next to the 'County' fields in both sections. At the bottom of the window, there are buttons for 'Import Sales Lead', 'Credit Check', 'Export', 'OK', and 'Cancel'.

Adding/Editing Customer Line-Version 16.1.1

The F8 button has been removed. It has been replaced by selecting sources from the buttons on the right.

The screenshot shows the 'Adding Customer Order Line - Invoice RD12345' window. The main area contains fields for Line Number (0006), Product Code (01 CARPET), Roll Number, Style, Color, Id#, Unit (SF Unreferenced), Width (0.00), Length (0.00), Quantity (0.00), Price (0.00), Total (0.00), Status (Cut), and Group (F8). A red oval highlights the 'F8' button with the text: '[F8] has been replaced by selecting source from buttons on the right.' To the right of the main area is the 'Order Line Assignment' panel, which contains several buttons: 'Roll Inventory - [Ctrl-R]', 'Item Inventory - [Ctrl-I]', 'Roll Products - [Ctrl-P]', 'Item Products - [Ctrl-D]', 'Services - [Ctrl-S]', and 'Unreferenced - [Ctrl-U]'. A red arrow points from the 'F8' button area to the 'Item Products - [Ctrl-D]' button. At the bottom of the window, there are buttons for 'Notes', 'Available', 'Reference Line', 'OK', and 'Cancel'.



To use the keyboard to get to the Order Line Assignment options, use the Ctrl-(letter shown above).

Schedule Pro Button

A Schedule Pro Button has been added to the Edit Order screen. Clicking the button will take the user to the Schedule New Jobs screen in Schedule Pro or create a To Be Scheduled alert. This can be very helpful when exporting a quote to an order.

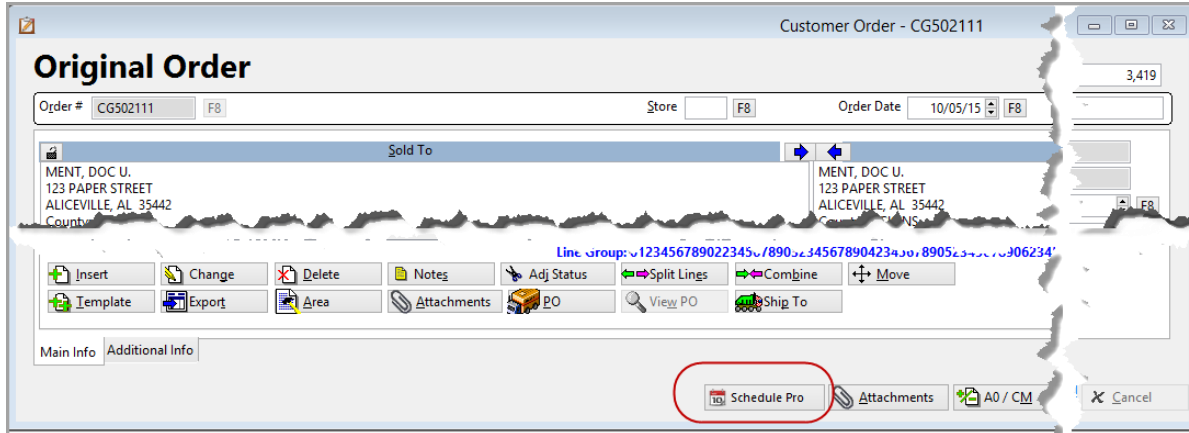


Figure Edit Order Screen

Scanning Bar Codes

When scanning bar codes in an order, if there are multiple items with the scanned item code, then the user will be required to select the correct record. This is to prevent selecting the wrong color.

Work Order

Work Order can now be emailed from the Customer Order.

Print Work Order and check the Email Work Order box on the Confirm Work Order Printing screen.

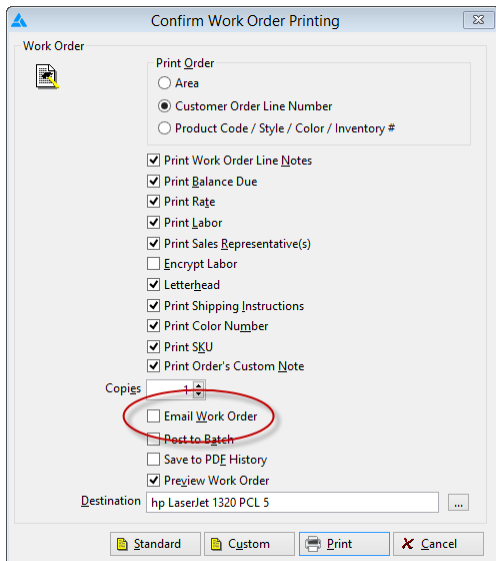


Figure Confirm Work Order Printing Screen



In version 15.1, the ability to email Work Orders was added to Schedule Pro.

Billing Groups

Add On & Credit Memo and Overage buttons have been added to the Billing Group toolbar.

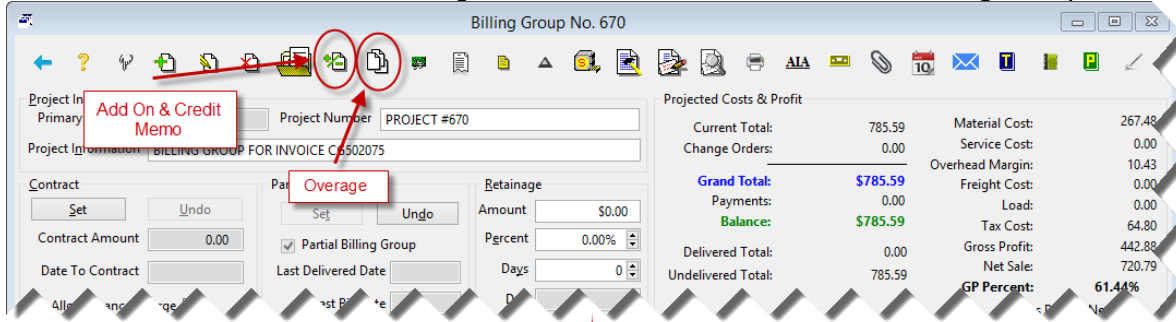


Figure Billing Group Screen

The total including Overages is now included in the Billing Group

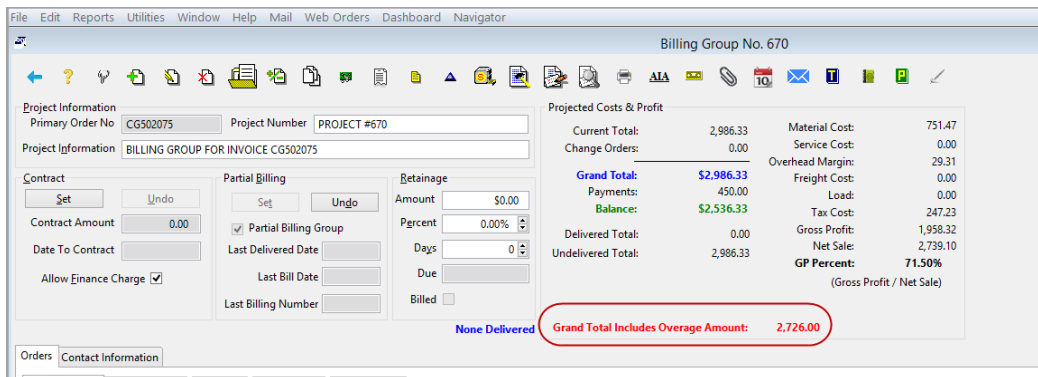


Figure Billing Group Screen

Credit Card Payments

The Name on Card field has been added to the Customer Payment screen. If the card is entered manually, then this field can be edited.

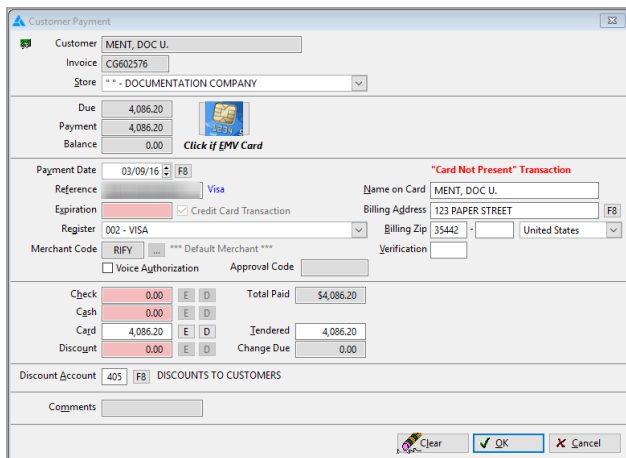


Figure Customer Payment Screen

Visa and MasterCard have implemented an Approved Amount feature. This is used in the event that the card holder tries to charge one amount and is limited to another amount. The amount that will be charged to the card and an explanation will show in RFMS. This will enable the salesperson to explain what happened.

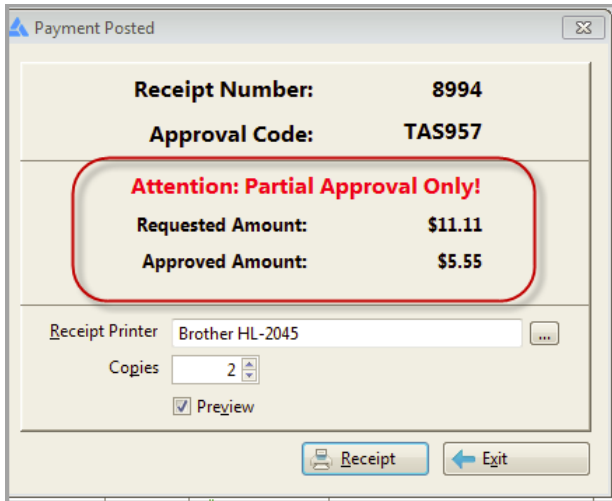


Figure Payment Posted Screen

Job Cost Sheet

Job Cost Sheet printing is now set at each workstation.

Quotes

Find Screen

The Marketing fields: Ad Source, UD Order Type, UD Contract Type and UD Service fields have been added to the Quotes Find Screen.

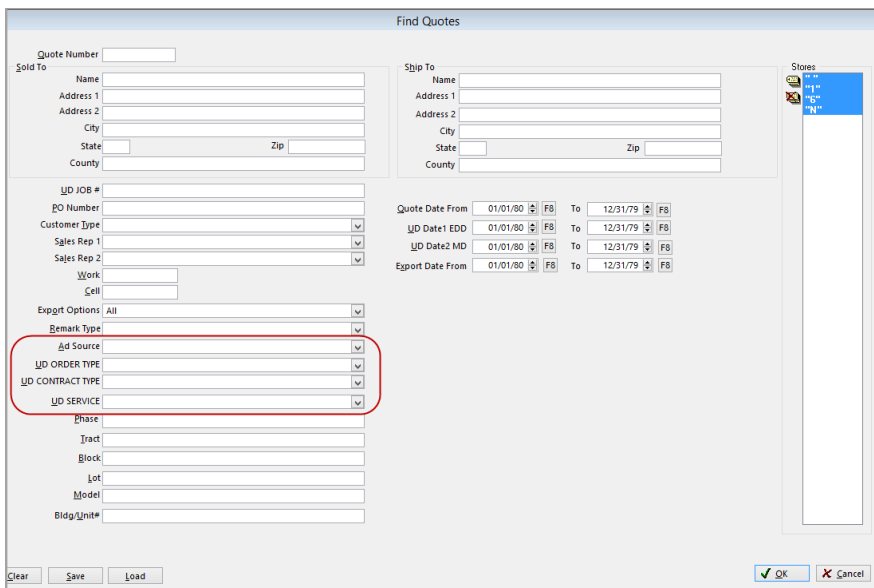


Figure Quotes Find Screen

Export Quotes

When a quote is exported, there is now a checkbox that will allow the user to edit the order after export.

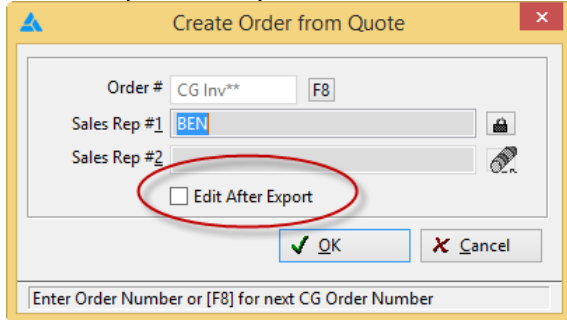


Figure Create Order from Quote Screen

If the checkbox is checked, the order is opened allowing it to be edited. Saving the order returns the user to the quotes browse screen.

Scanning Bar Codes

When scanning bar codes in a quote, if there are multiple items with the scanned product code, then the user will be required to select the correct record which will prevent from selecting the wrong code.

Customers

Customer List Report

File>Customers>Edit>Customer List Report or File>Customers>Print Button



The Tax ID and the Tax Expiration Date have been added to the csv.

	A	B	C	D	E	F	S	T	U	V	W
1	Store	Customer	Addr1	Addr2	City	State	RenewalC	Contact	Bus_Sold	Tax_ID	TaxExpireDate
2	" "	223456789	30 CHARACTERS	5678	AKRON	AL	one)	CONTACT	80 CHARA	123	20140829
3											
4											

Figure Customer List Report CSV

United Kingdom Tax Inclusive

The United Kingdom can now create tax included Orders with the ability to specify whether an Order is Tax Inclusive or not. This is accomplished by means of a “Tax Inclusive” checkbox at the top an Order being edited. If the user wants to change the status of an Order to tax included or vice versa, they only need to change the state of the “Tax Inclusive” checkbox.

RFMS starts up as not tax inclusive. In this case, it is not possible to do a tax inclusive Order. The Tax Inclusive checkbox will not be visible.

Setting up for action

1. System Options – In Admin System Options, a search for “gst incl” and return two entries, one of which has the Option “GST Included in Price for Order Entry”. Simply change the value from No to Yes and you’re in business.
2. Customer Type allows you to designate which customer types will default to Tax Inclusive. A new Order will default to the setting in Customer Type. Additionally, if the Customer Type is

changed while in the Order, it will adjust the Order to the Tax Inclusive designation of the Customer Type. Of course, the value can be changed again with a single click in the Tax Inclusive checkbox.

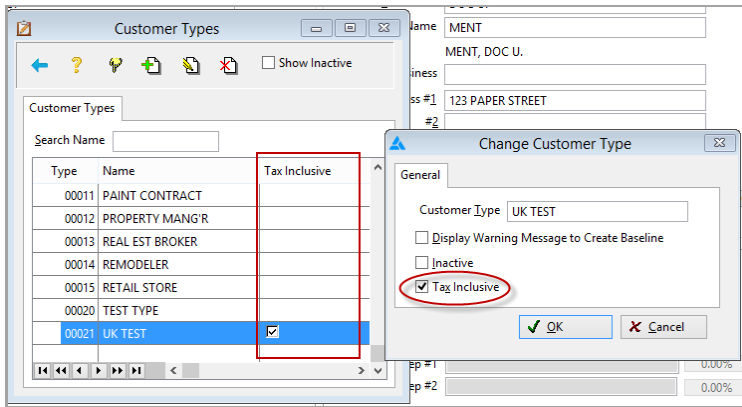


Figure Customer Type Edit Screen

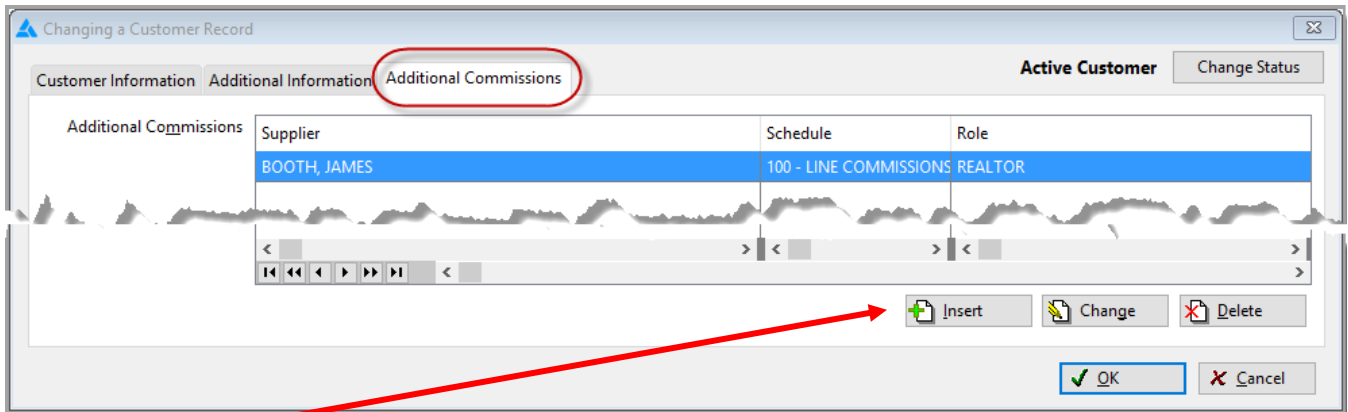
Customer Filter Screen



Zip Codes

To search using zip codes, use the Beginning and End search fields under the Sold-To and the Ship-To

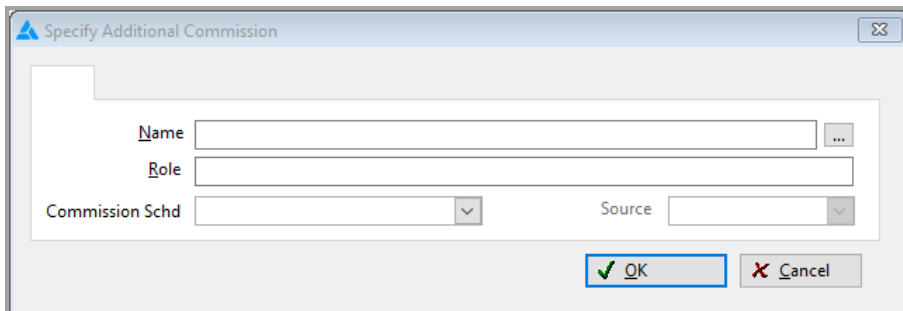
Additional Commissions Tab



Insert



The Specify Additional Commission tab appears



Field Explanations

Name-Click the Ellipse button to pull the information from *Utilities>Commissions>Additional Commissions tab*

The fields below are pulled in from the choosing a Name above.

Role-The role is a representation of the commission type. For example, you may want to pay Commissions to an interior designer on a particular job. You would therefore enter Designer as a role.

Commission Schd-Select a Commission Schedule from the drop down menu. These schedules have been set up at *Utilities>Commissions>Commissions Schedules tab*

Source- This will be Customer, Human Resource, or Supplier.

Change 

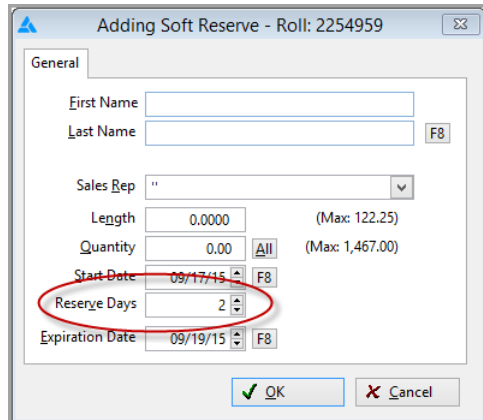
This option allows the Commission Schedule only to be changed on the record. No other fields can be edited from this screen.

Roll Inventory

Soft Reserve

File>Roll Inventory>Soft Reserve Button 

Soft Reserve will now retain the last entered number of Reserve Days as the default value for the user.



The screenshot shows a dialog box titled "Adding Soft Reserve - Roll: 2254959". It has a "General" tab and several input fields: "First Name", "Last Name" (with an "F8" button), "Sales Rep" (a dropdown menu), "Length" (0.0000, Max: 122.25), "Quantity" (0.00, All, Max: 1,467.00), "Start Date" (09/17/15, F8), "Reserve Days" (2, circled in red), and "Expiration Date" (09/19/15, F8). At the bottom are "OK" and "Cancel" buttons.

Figure Roll Soft Reserve Screen



This has also been added to the Item Inventory area.

Item Inventory

Browse Inventory Screen

The User Defined Serial Number Prompt field has been added to the screen.

SC	PC	Private Item #	Item	Run Lot	Price	Available	Lading #	PO #	Id#	SKU
" "	03	1770	RED 2X3		0.00	0.00		CG7031930001		
" "	07	43213LG				0.00	2314640002	721760003		
" "	07	751626	(78")			0.00	1897270002	719360004		
" "	07	781026	(78")			0.00	2314640001	721760002		
" "	03	ALABAMA				0.00				

Find Inventory Screen

The user defined Serial Number Prompt field has been added to the screen.

Find Inventory

Stores: 1", 6", N"

PC: 05 REMNANTS, 04 PAD, 05 WALL PAPER 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 ** UNDEFINED **, 20 ** UNDEFINED **, 21 ** UNDEFINED **, 22 ** UNDEFINED **, 23 ** UNDEFINED **, 24 ** UNDEFINED **, 25 ** UNDEFINED **, 26 ** UNDEFINED **, 27 ** UNDEFINED **, 28 ** UNDEFINED **, 29 ** UNDEFINED **

Supplier: _____

Style/Item: _____

Color/Description: _____

Roll/Item Number: _____

Dye / Run Lot: _____

Width: _____

Length: _____

PO Number: _____

Sidemark: _____

Collection: _____

System Ref. Number: 0

Id#: _____

Lading #: _____

Display "Zero Available" Inventory

Clear OK Cancel

Figure Item Inventory Find Screen



Notes:

This field's name can be edited from the *Serial Number Prompt* system option (*>Utilities>System Options>System Wide>Inventory>Serial Number Prompt*)

Consolidation

The ability to average cost has been added to the consolidation tool. A new record will be created due to the new cost.

Batch Job Cost

File>Reports>Batch Job Cost

Batch Job Cost is now compatible with referrals.

There is a new selection in the Invoice section called Send Email to. This selection allows the user to choose the Order Email Address or the Statement Email Address if the Email PDF box is checked.

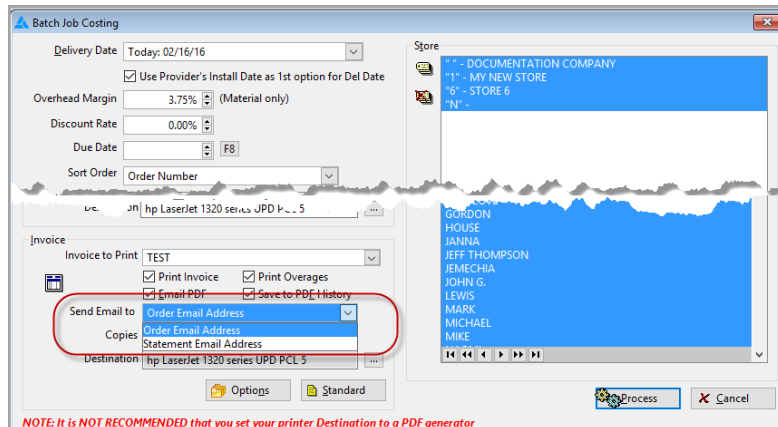


Figure Batch Job Costing Screen

If Order Email Address is selected, it will email the invoice to the address on the order. If there is not an email address on the order, no email will be sent.

If Statement Email Address is selected and there is a statement email address for the customer, it will send the email to the Statement Email Address. If there is no Statement Email Address, the Order will print even if the Print box is not checked.

Inventory

Find Screen

The Find Screen now allows negative numbers.

Purchase Order

Express Receiving

Express Receiving allows the Store to now be changed.



Notes:

This feature has also been added to the Warehouse Receiving (*File>Special Receiving>Warehouse Receiving*)

Find Screen

The Reference Number and Purchase Order Number have been added to the Find Screen.

Purchase Order Find

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 T
12	DRAPERIES
13	LAMINATES
14	** UNDEFINED **
15	** UNDEFINED **

Status

To Be Ordered Open Back Ordered

Satisfied Canceled

Sent (EC) Rejected (EC) Satisfied (EC)

Supplier: [] F8

Sidemark: []

Collection: []

Private Collection: []

Ref Number: []

PO Number: []

Order Date From: 01/01/80 F8

Order Date To: 12/31/79 F8

Requested Ship Date From: 01/01/80 F8

Requested Ship Date To: 12/31/79 F8

Promise Date From: 01/01/80 F8

Promise Date To: 12/31/79 F8

Req Del Date From: 01/01/80 F8

Req Del Date To: 12/31/79 F8

Measure Date From: 01/01/80 F8


Measure Date To: 12/31/79 F8

Buttons: Clear, Save, Load, OK, Cancel

Figure Purchase Order Find Screen

Auto PO Generation



The ability to tag a line or assign a line (Green Roll)  can now be done by clicking in the left column.

To Buy List (Order Lines Toggled for Auto PO Generation)

Gen Po Order Lines * NOTE - Order Lines that are currently being edited by other workstations will not be displayed by this screen

Store: ALL Search Prod Code: 00 F8

Supplier	SC	PC	Style/Item	Color/Desc	Roll/Item #	Width	Length	Item Size
	**	01	FORCE FIELD 24	BLUE STEEL		12.00	83.33
			11 GOLD-7/16					6'0"X45'0"
			CRACK SUPPRE					6'0"X45'0"
			CRACK SUPPRE					6'0"X45'0"
			GROUT					6'0"X45'0"
			LVT ADH - SH					6'0"X45'0"
			SH MARBLE THRE					6'0"X45'0"
			NAPLOCK					6'0"X45'0"
			T REDUCER CPT					6'0"X45'0"
			T RUBBER STAIR					6'0"X45'0"
			STAIR TREAD E					6'0"X45'0"
			THINSET 50P					6'0"X45'0"
			DRIFTWOOD					6'0"X45'0"
			4580-4567890223					73.84'X50'
						12.00	10.00
								3183'

Context Menu:

- Select
- Insert
- Change
- Delete
- Tag
- Tag All
- Untag
- Untag All
- Assign Inventory to Order Line
- Add/View/Edit Notes
- Combine Material into one Stock PO
- Auto Generate Tagged Order Lines
- 80-45
- Find
- AAA C
- Reset

Figure Auto PO Generation Screen

Print Purchase Orders

By setting the System Option ["Print Company Logo on Purchase Order"](#) to yes, the logo/image will automatically print on the standard Purchase Order.

View Corresponding Customer Order-Version 16.1.2

If the System Option “[Always Show Install Store](#)” is set to yes, then on the View of Original Order Screen the Install Store will be displayed

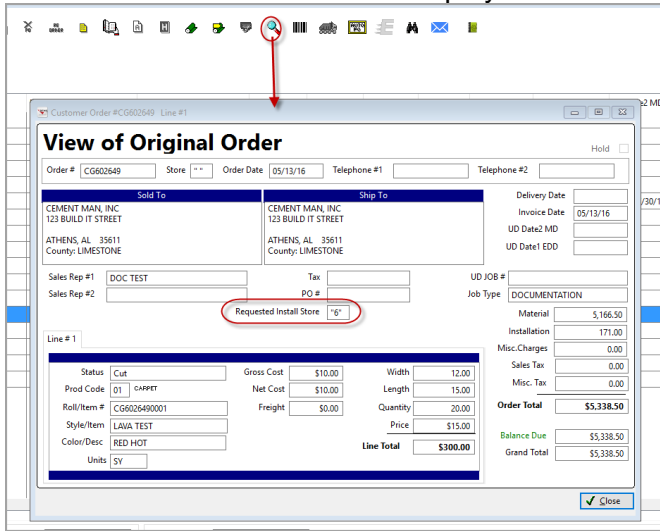


Figure View of Original Order Screen

Roll Inventory

File>Roll Inventory

Private Collection

The Private Collection field has been added to the browse screen and the Edit Screen.

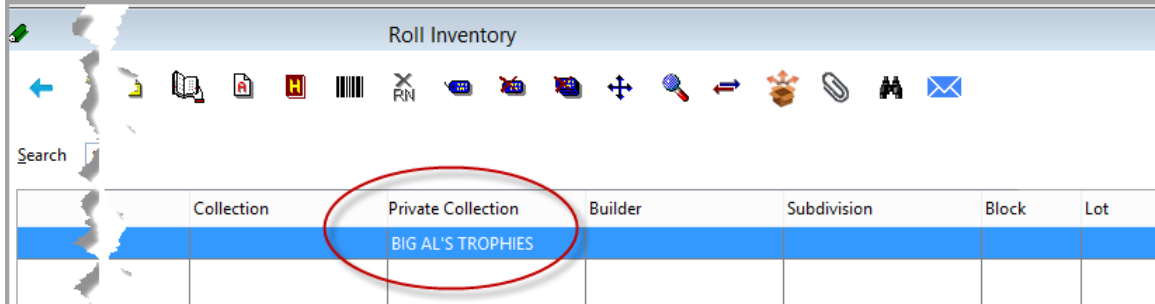


Figure Roll Inventory Browse Screen

Changing -- Roll# 15TO16 (Received from Invoice)

Store: ** F8
 Product Code: 01 CARPET
 Manufacturer: TEST F8
 Supplier: TEST F8
 Priv Supplier: TEST 2 F8
 PO #: #ST086840001

Roll #: 15TO16 F8
 Date Rcvd: 09/16/15 F8
 Invoice #: TEST3
 Invoice Date: 09/16/15
 Location:
 Sidemark:
 Comments:
 Inventory User #: 0.00

Priv Style: CHAMPIONS F8
 Priv Color: ROLL TIDE RED
 Style Type:
 Priv Color #:
 Color Type: F8
 Fiber Type: F8
 Quality: F8
 Backing: F8
 Dye Lot:
 Roll/Cut: Roll
 Pile Height: 0.0000
 Pile Weight: 0.0000
 Toxicity #:
 Id#:
 SKU:
 Manf SKU:
 Collection:
 Priv Collection: BIG AL'S TROPHIES

Gross Cost: \$150.0000 F8
 Net Cost: \$150.0000
 Freight: \$0.0000
 Load: \$0.0000

Width: 12.00
 Beg Length: 250.00 3000 SF
 Used: 0.00
 Reserved: 0.00
 Available: 250.00 3000 SF

Unit Price: \$0.00 F8 C
 Initial Value: \$450,000.00

OK Cancel

Figure Roll Inventory Edit Screen

Edit Roll Screen

When changing the cost, users will now be allowed to enter their own roll number and check to see if the Roll Number is available.

After the cost has been changed and TAB is hit, a new window opens. In this window, the Roll Number can be entered automatically or the default CG Roll # can be used.

Roll Inventory

Changes to the gross cost will result in the creation of a new record.

Roll Number: ROLLTIDE15 F8 Available

Would you like to proceed?

Yes No

Figure Cost Change Screen



The F8 button can be used and the Roll Number will return back to the CG Roll #

Roll History

The Roll Number for the Transferred Roll is added to the existing Roll History in the Invoice # column

SC	PC	Roll #	Supplier	Style	Color	Dye Lot	Width	Beg Length	Used	Rsvd	Sft Rsv	Avail	PO #	SKU	Locati
001	01	RFMSTEST10	RFMSTEST10	RFMSTEST10	RFMSTEST10		12.00	120.00	10.00	36.00	0.00	74.00			
016	01	RFMSTEST10A	RFMSTEST10	RFMSTEST10	RFMSTEST10		12.00	0.00	-10.00	10.00	0.00	0.00			BB-1

History for Roll #: RFMSTEST10

Status	Invoice #	Line	Customer Name	Del Date	Trans Date	Beg Length	Amt Used	Balance	Gross Cost	Remarks
New		0	RFMSTEST10		01/07/16	120.00	0.00	120.00	12.0000	*NEW*RECEIVING
Costed	RFMSTEST10	0	RFMSTEST10		01/07/16	120.00	0.00	120.00	12.0000	COSTED Receiving/Costing
Reserve	CN000597	1	WHEAT, TERRY		01/07/16	120.00	22.00	98.00	12.0000	
Reserve	WE000546	1	SMITH, BRIAN		01/07/16	98.00	14.00	84.00	12.0000	
Adjustment	RFMSTEST10A	0	*TRANSFER TO STORE 016 TRANS #4743	01/07/16	01/07/16	84.00	10.00	74.00	12.0000	*TRANSFER TO STORE 016 TRANS #4743

Item Inventory

File > Item Inventory

Browse Screen

The user defined Serial Number Prompt field has been added to the browse screen.

Search

SC	PC	Private Item #	Lading #	PO #	Id#	SKU

Figure Item Inventory Browse Screen



This field's name can be edited from the *Serial Number Prompt* system option (*>Utilities>System Options>System Wide>Inventory>Serial Number Prompt*)

The Lading Number has been added to the browse screen.

Search

SC	PC	Private Item #	Reserved	Soft Resv	Available	Lading #	PO #	Id#	SKU

Figure Item Inventory Browse Screen



Find Records

The Lading Number has been added to the Find Inventory Screen.

The screenshot shows the 'FIND INVENTORY' window. On the left is a 'Stores' list with 'PC' selected. The main area contains various search filters: Manufacturer, Supplier, Style/Item, Color/Desc, Roll/Item Number, Lot Info, Width, Length, PQ#, Sidemark, Location, RFMS Barcode, Date Rcvd From, Date Rcvd To, Qty Avail From, Qty Avail To, Gross Cost From, Gross Cost To, Collection, Private Collection, Color/Desc Number, Invoice Number, Id#, Lading Number (circled in red), Fiber, Origin, Price Code, and Construction. There are also checkboxes for 'Show Uncosted Inventory Only', 'Show Costed Inventory Only', and 'Show Zero Available Inventory'. Buttons for 'Clear', 'OK', and 'Cancel' are at the bottom.

Figure Find Inventory Screen

Reports

Purchase Order Listing Report

Reports > Purchase Order Listing Reports

This report has been added to the Reports Drop Down menu. This report was on the PO Print button. Since the report does not depend on the Purchase Orders that have been tagged, it was confusing to some clients.

Page No: 1
01/13/16
04:15PM

DOCUMENTATION
PURCHASE ORDER LISTING REPORT

PO Line #	Product Code	Roll / Item #	Style / Name	Color / Desc	Sidemark	Roll / Cut	Amount on Order	Units	Promise Date	Status	Ordered By
** Supplier:											
CG400989-0005	08	ADH - SHAW 1	ADH - SHAW 1000	ADH - SHAW 1000	CG400989	-----	10,800.02	SF		To Be Ordered	*AUTO GENERATED
** Supplier: ARMSTRONG WORLD INDUSTRIES											
#ST08733-0001	02	#ST087330001	CUSHIONSTEP BEST	AUTUMN 33109		Cut	120.00	SF	12/23/15	Open	D
#ST08733-0002	02	#ST087330002	CUSHIONSTEP BEST	AUTUMN 33109		Cut	120.00	SF	12/23/15	Open	D
#ST08733-0003	02	#ST087330003	CUSHIONSTEP BEST	AUTUMN 33109		Cut	120.00	SF	12/23/15	Open	D
CG502149-0001	02	CG5021490001	CUSHIONSTEP BEST	WENGE SP AMBER 33115	MENT, DOC U.	Cut	180.00	SF	12/22/15	Satisfied	DOC TEST
** Supplier: BITS N BYTES											
#ST08725-0001	01	#ST087250001	CHAMPIONS	ROLL TIDE RED		Roll	180.00	SF	12/22/15	Satisfied	SABRINA
#ST08726-0001	01	#ST087260001	CHAMPIONS	ROLL TIDE RED		Roll	180.00	SF	12/22/15	Satisfied	SABRINA
#ST08727-0001	01	#ST087270001	CHAMPIONS	HOUNDSTOOTH		Roll	180.00	SF	12/22/15	Open	SABRINA
#ST08728-0001	01	#ST087280001	CHAMPIONS	ROLL TIDE RED		Roll	180.00	SF	12/22/15	Open	SABRINA
#ST08732-0001	01	#ST087320001	CHAMPIONS	HOUNDSTOOTH		Roll	180.00	SF	12/22/15	Satisfied	SABRINA
#ST08732-0002	01	#ST087320002	CHAMPIONS	HOUNDSTOOTH		Roll	180.00	SF	12/22/15	Satisfied	SABRINA
#ST08732-0003	01	#ST087320003	CHAMPIONS	HOUNDSTOOTH		Roll	180.00	SF	12/22/15	Satisfied	SABRINA
CG502118-0001	01	CG5021180001	CHAMPIONS	ROLL TIDE RED	MENT, DOC U.	Cut	180.00	SF	11/24/15	Satisfied	"
** Supplier: CARPET WHOLESALE											
#ST03843-0004	08	10-444	BLADES-ROBERTS	FOR WALL TRIMMER	STOCK	-----	10.00	10PK	12/04/98	Satisfied	MARK
** Supplier: DAL TILE											
CG400989-0002	06	S131 DORADO	DALTILE 3X12 DORADO CROSS	CROSSCUT	CG400989	-----	1,035.03	LF	12/16/15	Open	D
CG502151-0001	06	S8320834028A	KEYSTONE BLENDS FIELD TILE	PINK BLEND	PENTATONIX	-----	24.00	SF	12/14/15	Open	ANDREW
CG502153-0002	06	00015	GROUT NON-SANDED 10 POU	#413 MIDNIGHT BLUE	MENT, DOC U.	-----	5.00	EA	12/17/15	Satisfied	DOC TEST
CG902958-0006	06	17288	MATTE FIELD TILE	MATTE ALMOND GLAZED	STEWART, SHARON	-----	25.00	SF		Satisfied	MARK
CG902961-0001	06	17397	PARAISO FIELD TILE	ARTICO(SPS51)	HARRELL, ELIZABETH	-----	116.97	SF		Satisfied	MARK

The cost has been added to the CSV.

Store	Supplier	Private Su	PO Numbr	Product C	Roll/	Cc Collection	Private Cc	Amount R	Manufact	Item Syst	Gross Cost
" "			#ST08618-	6	S-131	ROSS CUT		0		45447	2.05
" "	** FROM E	** FROM E	CG502075-	1	CG502			0	MOHAWK	0	16.83
" "	** FROM E	** FROM E	CG502075-	1	CG502			15.8933	MOHAWK	0	16.83
" "	1099 SUPP	1099 SUPP	#ST08630-	1	#ST08			0	1099 SUPP	0	4.5
" "	1099 SUPP	PRIVATE S	#ST08698-	9	SUPPL	ATE DESCRIPTION #		0	MANUFAC	45473	0.5

Purchase Order Summary Report

Reports>Purchase Order Summary Report

The Purchase Order Summary Report is now a standalone report.

Figure Purchase Order Summary Report Screen

Item Inventory Range Report

Reports>Item Inventory Range Report

The Private Collection field has been added to the CSV.

Store	PC	Manufact	Supplier	Invoice #	Invoice D	Name	Descr	Collection	Price Cc	Fiber	Cons	Country	Private Supp	Private Collection
	6		LOWES	CG203168-	20150512	CERAMIC	DOR							
	3	** FROM E	1099 SUPP	123	20140331	BRASS ST	BRAS						1099 SUPPLIER	
	7	** FROM E	FLOORS, II	519011	20120814	STAIRNOS	WHITE						FLOORS, INC.	
	6	** FROM E	WCO	M/E	20070430	WEST PAL	202	1					** FROM BCOE **	
	8	** TUF TO	CABINESS	323823-A	20121002	TUP TOP	1	CLEAR					CABINESS	
	10	3-M	FLOORS, II	319541	20041117	BUFFING F	WHIT	1						
	10	3-M	FLOORS, II	356317	20060503	BUFFING F	WHIT	2						
	10	3-M	FLOORS, II	349662	20060210	SANDING	80 GP							
	10	3M	FLOORS, II	384760	20070424	3-M 16"	DI100G							

Figure Item Inventory Range Report CSV

Inventory Move

[Inventory Move User Guide](#)

Tag Item or Items for Moving to a New Store

A warning message will appear to let the user know that this record is already In-Transit and cannot be edited until the move is complete.

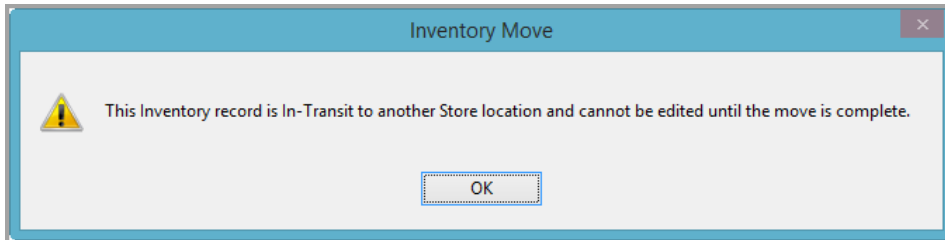
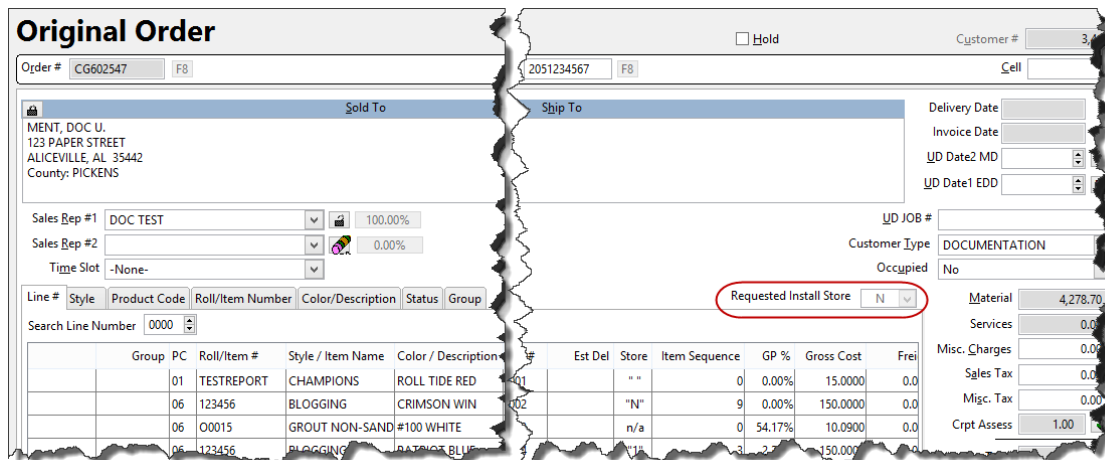


Figure Warning message for tagging

Requested Inventory

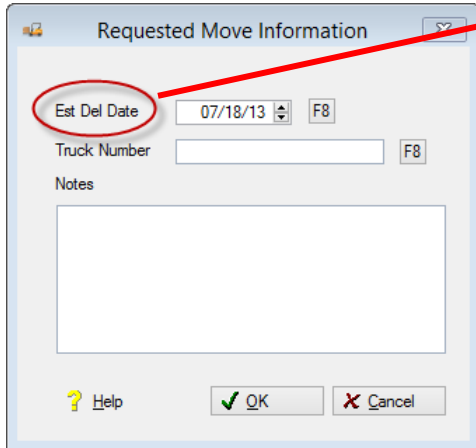
The Install Store Code has been added to the Order screen.



The install store can be different from the Order store; therefore the Order store and Requested store can be the same.

View/Process Requested Inventory

The Requested Move Information Screen appears when Process Requested Move  is clicked.



Requested Move Information

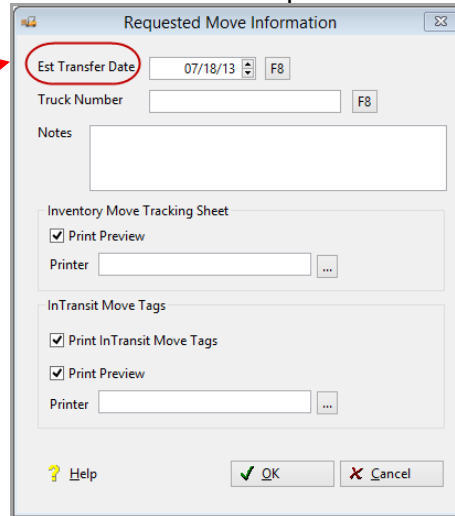
Est Del Date 07/18/13 F8

Truck Number F8

Notes

Help OK Cancel

Figure Old Requested Move Information Screen



Requested Move Information

Est Transfer Date 07/18/13 F8

Truck Number F8

Notes

Inventory Move Tracking Sheet

Print Preview

Printer ...

InTransit Move Tags

Print InTransit Move Tags

Print Preview

Printer ...

Help OK Cancel

Figure New Requested Move Information Screen

Est Transfer Date

The Estimated Delivery Date wording has been changed to Estimated Transfer Date.

Inventory Move Tracking Sheet

Once ok is click, the Inventory Move Tracking Sheet will Print. Check the Print Preview box if viewing before printing is needed.

InTransit Move Tags

Check the box to Print tags to be used when moving inventory from one store to another. Once received, a new roll tag should be printed.

```
Sold To:
Ship To:
Style:  CHAMPIONS
Color:  ROLL TIDE RED
Width: 12.00   Length: 15.00
Dye Lot:
Roll #:  #ST087260001
From:   " "- DOCUMENTATION C
To:     "1"- MY NEW STORE
Move Date: 01/12/16
UD Date1 EDD:
Trans #: 1053
      *IN TRANSIT*
```

Figure InTransit Move Tags

Inventory Move Summary Sheet

The dye/run lot has been added to Summary Sheet if it exists.

Inventory Move Summary Report										
Date Printed: 10/09/15										Page 2
Sorted By: Origin Store + Destination Store										
Origin	Destination	Trans #	Roll/Item # Product Code	Style/Item Color/Desc	Date Moved Received By	Date Rcvd	New Bin Location Old Bin Location	Width Length	Quantity	
**	**1*	1021	#ST085420001	DEUCE - HSC - INV - MESQUITE	12/29/14			12.00 2.08	24.96 SF	
In-Transit Unit Ship Weight: Line Total Ship Weight:										
Notes: Customer Name: CUSTOMER LAST, CUSTOMER FIRST Invoice Number: CG401021										
**	**1*	1028	#ST085420001	DEUCE - HSC - INV - MESQUITE	05/15/15			12.00 2.08	24.96 SF	
In-Transit Unit Ship Weight: Line Total Ship Weight:										
Notes: test test test Customer Name: CUSTOMER LAST, CUSTOMER FIRST Invoice Number: CG401021										
**	**1*	1029	#ST053390004	WAYFINDER GRASS ROOTS-331	05/15/15			12.00 10.00	120.00 SF	
In-Transit Unit Ship Weight: Line Total Ship Weight:										
Notes: test again Customer Name: CUSTOMER, RETAIL Invoice Number: CG401048										
**	**1*	1033	2054353	PRIVATE STYLE PRIVATE COLOR	07/22/15			12.00 10.00	120.00 SF	
In-Transit Unit Ship Weight: Line Total Ship Weight:										
Notes: Customer Name: CUSTOMER LAST, CUSTOMER FIRST Invoice Number: CG401064										
**	**g*	1036	RL1	LAYER BRICKRED	10/09/15			12.00 200.00	2,400.00 SF	
In-Transit Unit Ship Weight: Line Total Ship Weight:										
Notes: Test for IM Summary Report Dye Lot Customer Name: KYSER CONSTRUCTION Invoice Number: CG400969										
**	**g*	1027	35112072-A	AMAZEMENT - INV - 12 CANDLE GLOW	04/03/15			12.00 27.33	327.96 SF	
In-Transit Unit Ship Weight: Line Total Ship Weight:										
Notes: Customer Name: CUSTOMER, TEST Invoice Number: CG400976										

Figure Inventory Move Summary Report Preview

Products

Rolls

File>Rolls

Private Collection field has been added to the Extended Information 2 tab.

Changing a Roll Product

Product Information 1 Extended Information 2

Additional Product Spec

Private Collection: TEST COLLECTION

Inventory User #: 0.0000

Shipping Weight: 0.0000 oz /SF

Ship Qty Variance (+/-):

Estimating Information

Measure Product:

Estimating Unit: Imperial

Cut Gap: 0.0000 In 0 Inches

Cut Square: No Cut Gap Type

Seam Width: 0.0000 Ft Copy from Std Width

Pattern Width: 0.0000 In 0 Inches

Pattern Length: 0.0000 In 0 Inches

Pattern Drop: 0

Max T-Seams: 0 Waste Factor: 0.0000%

Last price formulas applied date:
Last cut cost used for pricing: 0.0000
Last roll cost used for pricing: 0.0000

XW= 1

OK Cancel



If a Collection has been typed in or added via F8 on the Product Information tab (first tab) and the private collection field is blank, then it will be updated automatically with the collection information once the OK button is clicked.

General Range Edit

File>General Range Edit

The General Range Edit screen has changed. For more information, click [here](#).

The following fields have been added to the Edit area:

Private Collection
Construction
Price Code
Private Id #

The following buttons have been added to the Range Criteria area:

FOB Point
Private Collection

Price Range Edit

The ability has been added to tag multiple suppliers under the Range Criteria area.

Accounting

Accounts Receivable

Finance Charges

File>Accounts Receivable>Finance Charges

Statement date, Finance Charge Date and General Ledger Date cannot be more than 30 days in the future.

When generating the list of orders to apply finance charges to, the system will look at the Term Days on the customer record. If the term days have not passed (based on the current date) then the invoice will not show in the list.

Last Payment/High Credit

File>Accounts Receivable>Last Payment/High Credit

If the customer chosen is a Member/Main type and the credit limit is shared across the Clients/Branches then the Clients/Branches are included in this report.

General Ledger

Printing Budgets

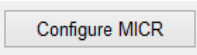
File>General Ledger>Budget>Budgets>Print Button 

Budget vs Actual, Year to Date and Current Budget Sheet reports will now exclude inactive zero accounts.

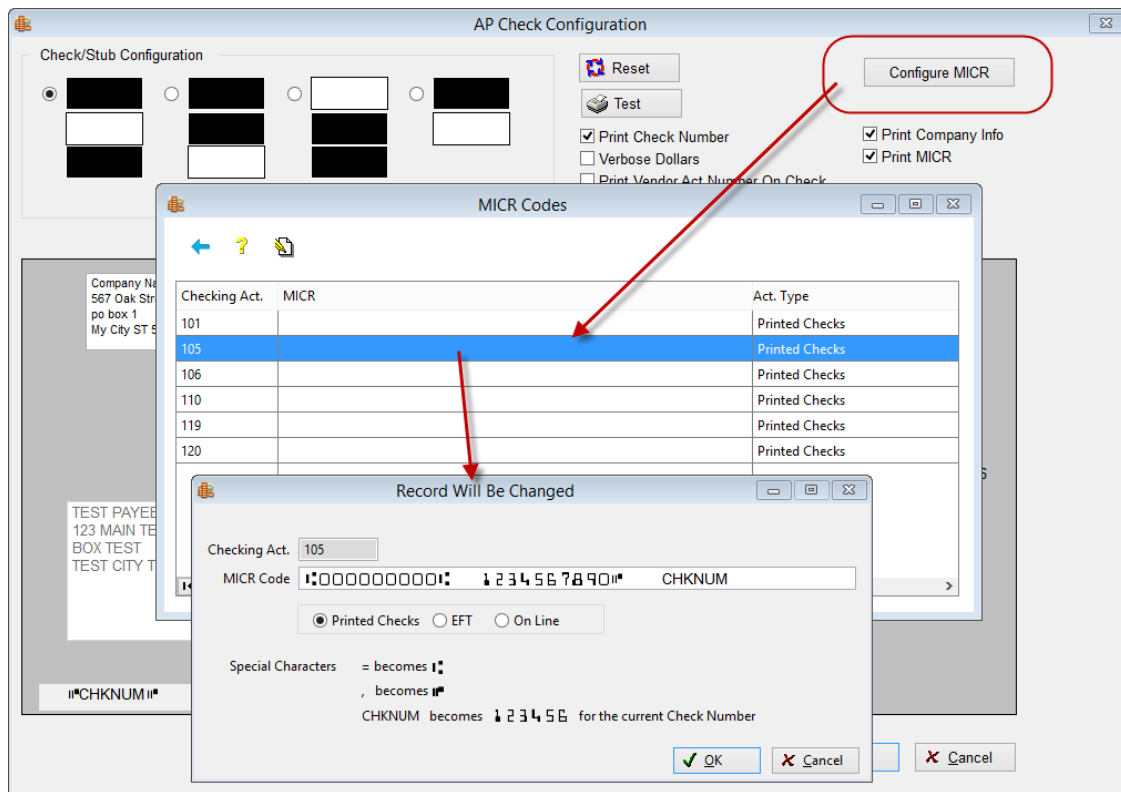
Banking

Printing Checks

Utilities>Configure AP Checks

A checking account can be assigned a type under the MICR button . It can be set as Printed Checks, EFT, or Online account type.

Blank Check Stock can now be used. RFMS can print the Company Information and the MICR routing information on the check. The correct font must be installed before printing.



The screenshot shows the 'AP Check Configuration' window with a 'Configure MICR' button circled in red. A red arrow points from this button to the 'MICR Codes' window. In the 'MICR Codes' window, a table lists checking accounts and their assigned MICR types. A red arrow points from the row where 'Checking Act.' is 105 and 'Act. Type' is 'Printed Checks' to a 'Record Will Be Changed' dialog box. This dialog box shows 'Checking Act.' as 105 and 'MICR Code' as 100000000010123456789010. Below the MICR code, there are radio buttons for 'Printed Checks' (selected), 'EFT', and 'On Line'. At the bottom, there are 'OK' and 'Cancel' buttons.

Checking Act.	MICR	Act. Type
101		Printed Checks
105		Printed Checks
106		Printed Checks
110		Printed Checks
119		Printed Checks
120		Printed Checks

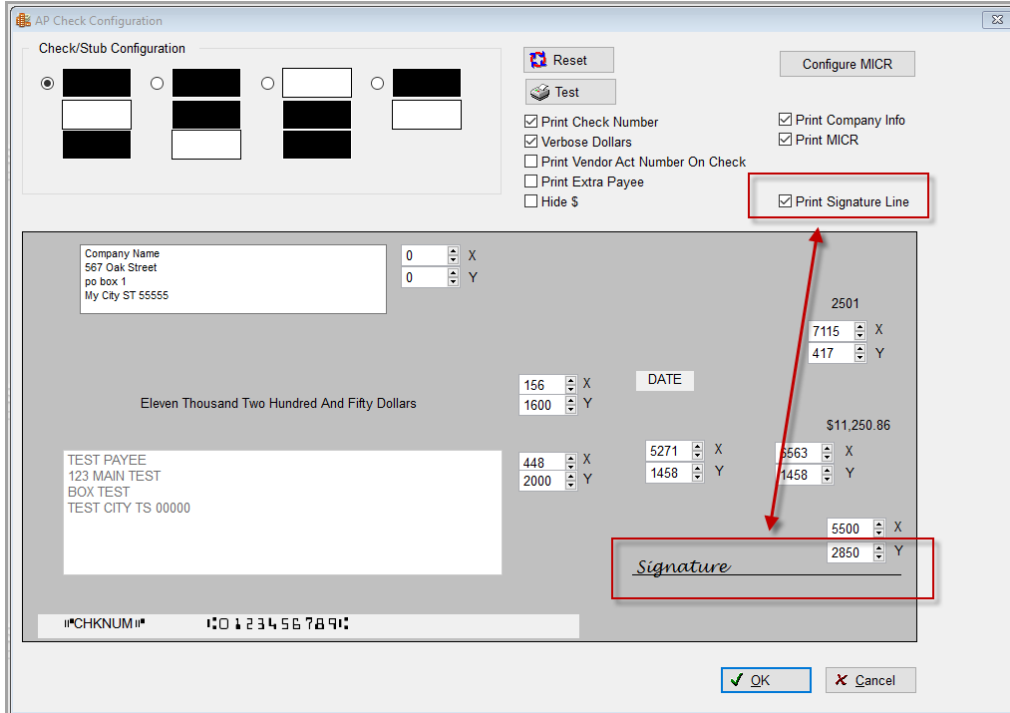


From <http://banking.about.com/od/checkingaccounts/a/printyourchecks.htm>

Bank information needs to be printed with magnetic ink. Finding magnetic ink is not simple at your local office supply store, and it's more expensive. Computers with magnetic readers read the account information off these checks to speed processing. If you print your own checks

without magnetic ink, you run the risk that the check will pass through a non-optical reader. Then, the check has to be processed manually. Manual processing can result in a fee for you and/or your payee, as well as slower payments.

Check the Print Signature Line box so that a blank line will print in that needs to be signed.



Posting Deposits

File>Banking>Add/Edit Checks>Post Deposit 

The ability to print Receipt Recap Report from the Deposit Info screen has been added.

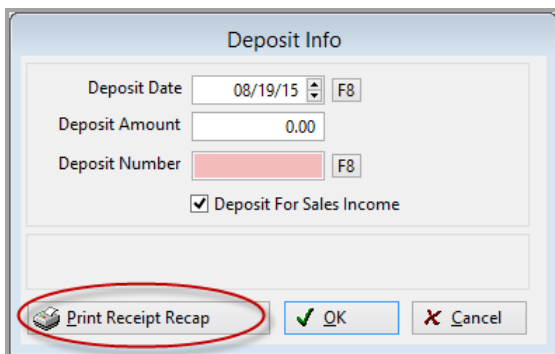


Figure Deposit Info Screen

Sales Commission

Commission Information

File>Sales Commission>Commission Information

The Commission Browse screen can be sorted by columns.

Instead of clicking on a tab to sort and search by that field, click on the column header and the search field becomes active for that field. If no column is clicked, the search is on the Invoice Number

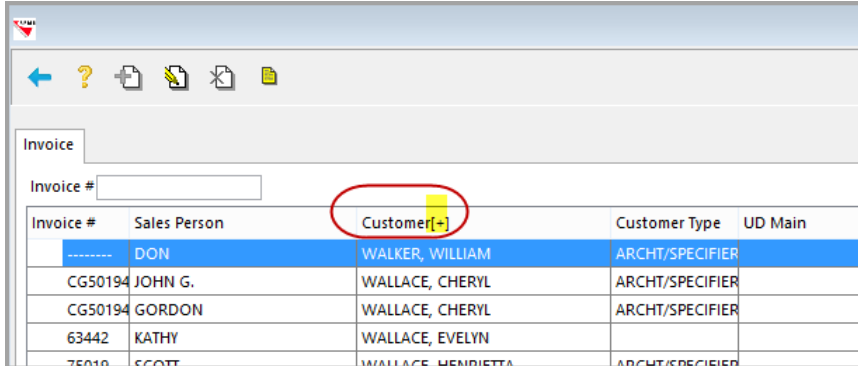


Figure Commission Browse Screen Sort

The Customer Type and the User Defined Main field have been added to the Commission Browse.

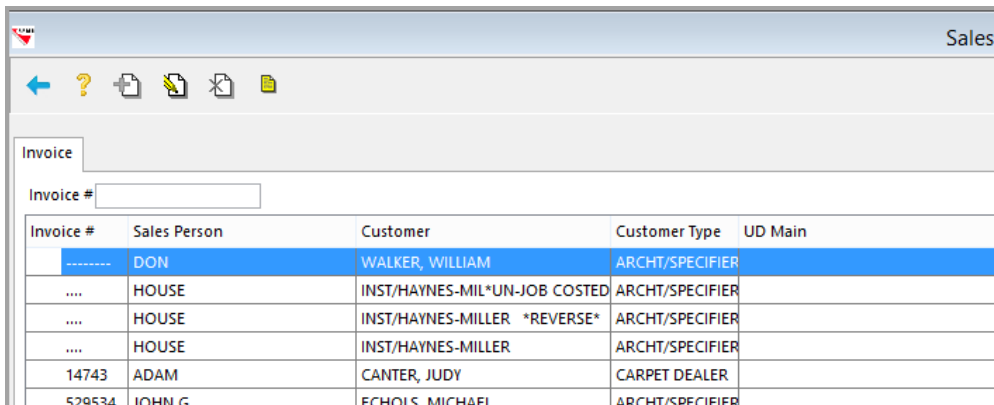


Figure Commission Information Browse Screen



Notes:

To assign a name for the user defined field go to

>Utilities>System Options>System Wide>Buying Groups>Customer Relationships-Main Category-Prompts

Print Commission History

File>Sales Commission>Print Commission History

The Store has been added to the CSV.

	A	B	C	N	O	P	Q	R
1	TSAL:COM	TSAL:DEB	TSAL:DEB	TSAL:COM	TSAL:COM	TSAL:COM	TSAL:COMM	TSAL:STORE
2	#####	1	#####	0	0	3	1	"1"
3	#####	1	#####	0	0	3	1	"1"
4	#####	1	#####	0.3266	600	3	1	" "
5								

Figure Commission History CSV

Month End

Month End Inventory Balance Report

The Purchase Order Number (PO Number) has been added to the csv.

Store	Sort 3	Supplier	Style / Ite	Color / De	Ro	Grs Value	Product C	Item Syste	PO Number
"1"		1 WHEAT'S	1 SQ FOOT	1 SQ FOOT	UNI	0	1	0	
"1"		1 SHAW INC	18TH HOLI	FALLING R	#ST	-118.8	1	0	#ST085660001
"1"		1 SHAW INC	18TH HOLI	MUTINY	CG55	2999.568	1	0	#ST085940001
"1"		1 SHAW INC	18TH HOLI	MUTINY	CG55	3946.8	1	0	#ST085940001

Figure Month End Inventory Balance Report csv

Human Resources

File>Human Resources

Version 16.1.4

Tax Update for Australia

The payroll update for Australia effective October 1, 2016 has been added.

Worker Information Report

x>File>Human Resources>File>Reports>Worker Information

Email Address has been added to the CSV.

Worker	Address1	Address2	City	State	Job Categ	Seq No	Worker ID	Email
AARON, C	2730 SHORT 16 STREE		TUSCALO	AL	-None-	41	41	
ABBOTT, E	69 KATE CIRCLE		WETUMPK	AL	-None-	104	104	
ADDISON, P.	O. BOX 661		REFORM	AL	-None-	339	339	
ALLBRITT, C	5050 CYPRESS CREEK		TUSCALO	AL	-None-	319	319	
ALLEN, JA	15371 TROPIC DRIVE		NORTHPO	AL	E (N) CRAFT WC	391	391	
ALLEN III, J	15218 GREEN CIRCLE		NORTHPO	AL	-None-	212	212	
AMMONS, J	16 ELMIRA DRIVE		TUSCALO	AL	-None-	179	179	
ANDERSON, J	2102 10TH STREET		NORTHPO	AL	-None-	359	359	
ANDERSON, J	2102 10TH STREET		NORTHPO	AL	-None-	303	303	
APLIN, GC	6819 GOLDEN ACRES		COTTOND	AL	E (N) SALES WO	137	137	
APLIN, JOI	6819 GOLDEN ACRES		COTTOND	AL	-None-	125	125	
APLIN, JOI	ROUTE 2 BOX 598		MATHISOI	MS	-None-	169	169	
APLIN, MI	4529 47TH COURT EA		TUSCALO	AL	-None-	252	252	
ARGO, CH	P.O. BOX 101614		IRONDALE	AL	-None-	118	118	
ARGO ENT, P.	O. BOX 206		MOODY	AL	-None-	139	139	
BARAJAS, C	1414 20TH AVENUE E		TUSCALO	AL	ANIC CRAFT WC	455	455	

Figure Worker Information Report CSV

Printing Pay Checks

Once the MIRC is Configured under *Accounting>Utilities>Configure AP Checks*, payroll checks can be printed on blank check stock.

RFMS can print the Company Information and the MICR routing information on the check. The correct font must be purchased and installed before printing.

In order to print this information, go to the Check Setup tab on the Print Pay Checks window.

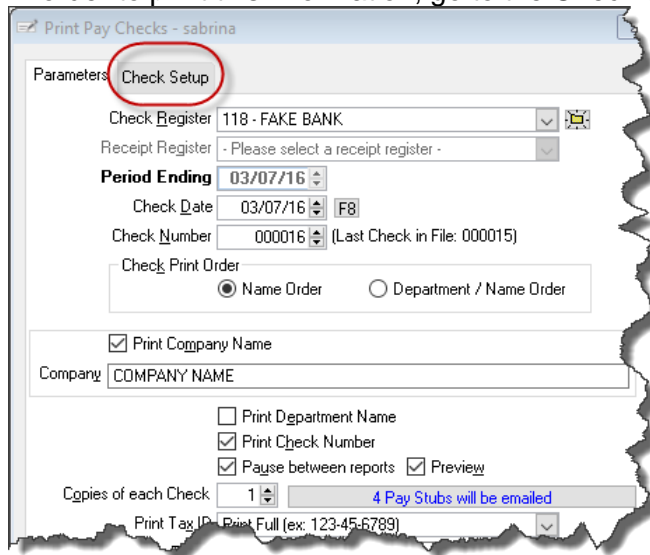


Figure Print Pay Checks Window

Check the Print MICR checkbox.

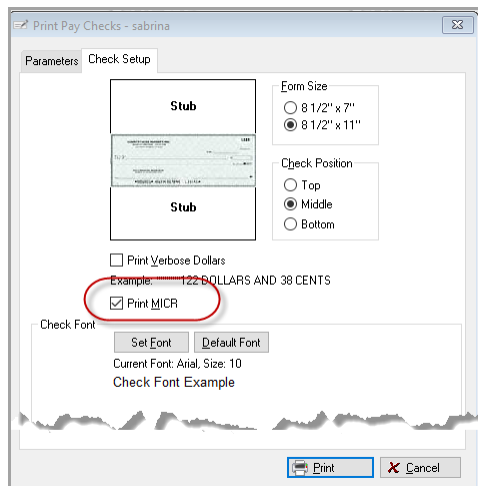


Figure Check Setup tab



This information will only show up on printed checks. It will not show up on emailed PDFs of checks since these checks cannot be deposited.

If a signature line is needed make sure the Print Signature Line box is checked.



From <http://banking.about.com/od/checkingaccounts/a/printyourchecks.htm>

Bank information needs to be printed with magnetic ink. Finding magnetic ink is not simple at your local office supply store, and it's more expensive. Computers with magnetic readers read the account information off these checks to speed processing. If you print your own checks without magnetic ink, you run the risk that the check will pass through a non-optical reader. Then, the check has to be processed manually. Manual processing can result in a fee for you and/or your payee, as well as slower payments.

941 Reports

The 2016 941 reports were included in the 16.1.1 release.

ACA Health Coverage (Form 1095-C) - Version 16.1.2

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

The 1095-C forms can be printed. Electronic submission will be available in the next release. On more information on printing the 1095-C, click [here](#).

Sales Reports

Material Analysis

Sales Reports>File>Material Analysis

The Requested and In-Transit line statuses have been added to this report.

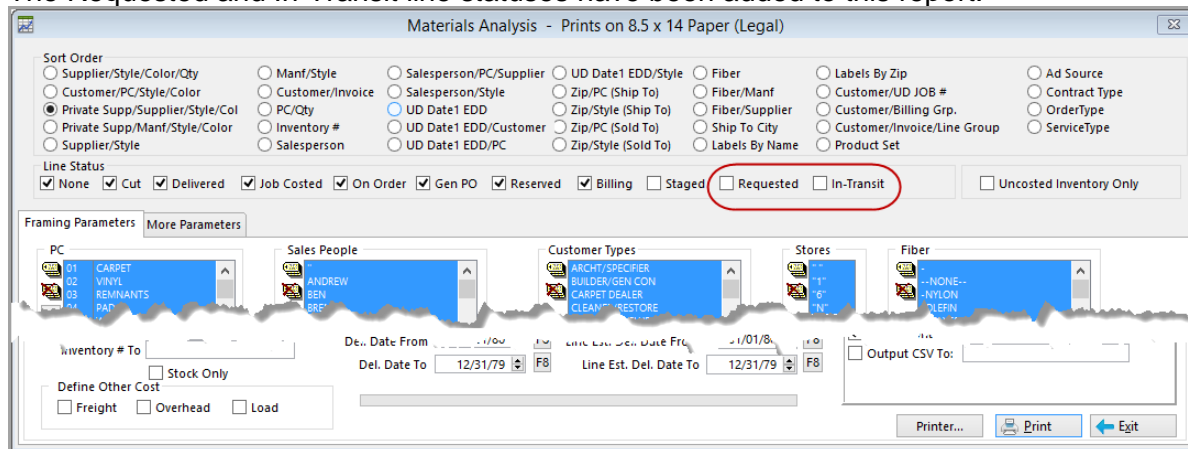


Figure Material Analysis screen

BidPro

Product Search

The ability to change or delete a color from this screen has been removed.

Estimates

Passwords

This browse will follow the Sales Representative Viewing Right for Orders, Quotes and BidPro Estimates set up in Maintain Passwords (*Order Entry>Utilities>Maintain Passwords*)

California Carpet Assessment

The CA Cpt Assess has been added to the Estimate screen.

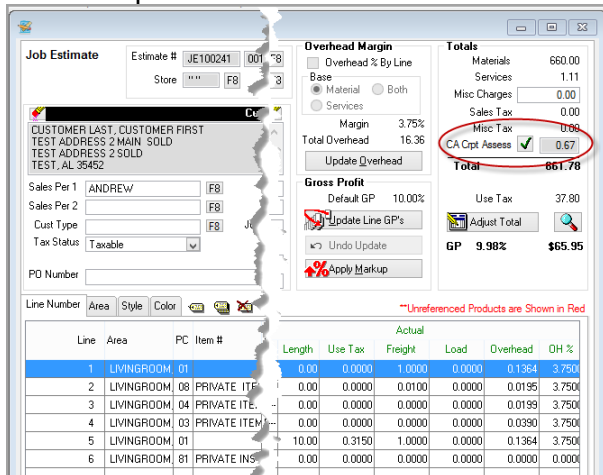


Figure Estimate Screen

Additional Information Tab

An Additional Info tab has been added to Estimates. This tab contains Ad Source, Contract Type, Order Type and Service Offering marketing fields. The Customer Email, Publish To Web, and Origination Code have been added to this screen.

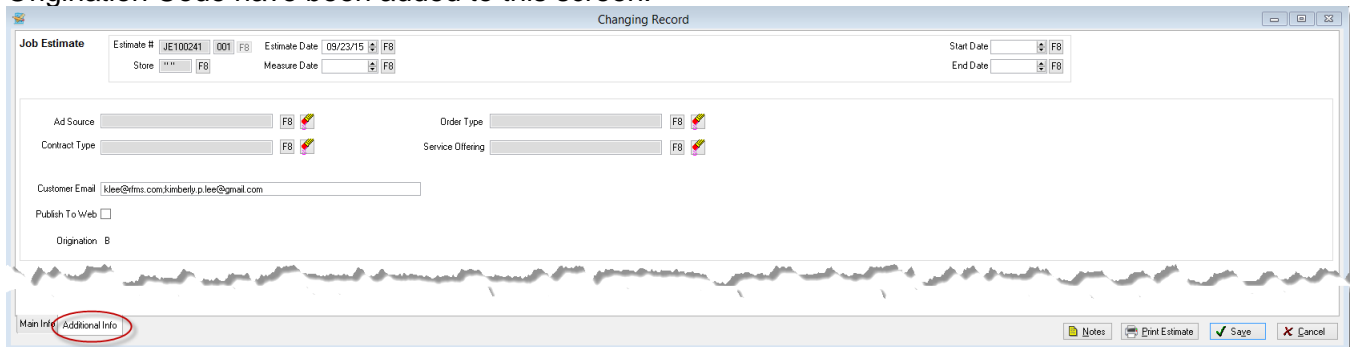


Figure Additional Information Tab



Exporting to Order Entry

When exporting to Order Entry, the Line Total Lock will now always pick up the Actual Total Lock setting from the BidPro Estimate Lines.

An option has been added to be able to Edit the New Order after exporting.

Export Estimate to Order Entry

Estimate #: JE100241 Estimate Date: 09/23/15

Order Details

Order Number: [F8] Order Date: 10/02/15 [F8] Est Del Date: [F8]

Customer Type: BUILDER/GEN CON [F8] PO Number: [F8]

Customer: CUSTOMER LAST, CUSTOMER FIRST
TEST ADDRESS 2 MAIN SOLD
TEST ADDRESS 2 SOLD
TEST, AL 35452

Project: TEST ADDRESS 2 SHIP
TEST ADDRESS 2 SHIP
TEST, AL 35452

Overage: Salesperson(s) ANDREW

Line	Area	PC	Style	Color	Width	Item #	Quantity	Price	Total
1	LIVINGROOM.DII	01	PRIVATE STYLE	PRIVATE COLOR	12.00		0.00	5.15	0.00
2	LIVINGROOM.DII	08	PRIVATE ITEM NAME	PRIVATE DESCRIPTION	7.32	PRIVATE ITEM	0.00	0.59	0.00
3	LIVINGROOM.DII	04	PRIVATE ITEM NAME	3.5# REBOND-7/16"	6.00	PRIVATE ITEM	0.00	0.59	0.00
4	LIVINGROOM.DII	03	PRIVATE ITEM NAME	PRIVATE DESCRIPTION	0.00	PRIVATE ITEM	0.00	1.15	0.00
5	LIVINGROOM.DII	01	PRIVATE STYLE	PRIVATE COLOR	12.00		120.00	5.50	660.00
6	LIVINGROOM.DII	81	PRIVATE CARPET INSTAL		0.00	PRIVATE INST.	1.00	1.11	1.11

Export Options

Export Custom Note to Order Combine and Append Similar Lines for Order ("Line Notes will be lost when this option is enabled")

Export Custom Note to Work Order Do Not Export Prices & Totals (Prices and Totals will be set to 0)

Export Internal Note to Order

Export Line Notes to Work Order Lines

Export Line Notes to Order Lines Update Contract Pricing on Estimate before Exporting

Edit New Order After Exporting

[Export] [Close]

Figure Exporting Estimate to Order Entry Screen



Printing Estimates

The option to print the Manufacturer as a Line Detail has been added.

Printing Estimate JE100241 - 001

General

Report Style: Blue Boxes [v] Use Lines to Separate Estimate Lines Print for Overage Save Current Format Settings as the Default

Report Header - Section 1

Letterhead: None [v] Logo: None [v] V:\5bbb91e7c13fa1999e6092109be1 [F8] Company Addresses: None [v] Addr 1: Store Ship To [v]

Vertical Estimate # on Right Title: None [v] Title Format: Estimate JE333333-001 12/12/ [v] Addr 2: User Defined [v]

Report Header - Section 2

Estimate Date: Left [v] Second Title: Right [v] User Defined-Second Title [v] Horizontal Estimate #: Centered [v]

Report Header - Section 3

Customer & Project Titles Customer Title: User Defined-Customer Title [v] Project Title: User Defined-Project Title [v]

Report Header - Section 4

Field 1: Work [v] Field 3: UD_JOB # [v] Field 5: ESTIMATE Number [v] Field 7: UD_HEADER LABEL [v]

Field 2: Job Phone [v] Field 4: UD_MODEL [v] Field 6: Salesperson 2 [v] Field 8: UD_HEADER LABEL [v]

Line Detail to Print

Line Detail Area Quantity Style/Item

Zero Total Lines Price Units Color/Desc

Line Notes Total Length x Width Manufacturer

Estimate Totals to Print

Hide All Totals Total Details Combine Labor/Material/Misc Totals Product Code Totals

Footer: Footer Text: User Defined [v]

Additional Items to Print

Estimate Pictures Line Pictures

Custom Note Standard Note

Cover Page (Rich Text Format Document) [F8]

Approval Signature (Rich Text Format Document) [F8]

Printer Options

Preview Copies: 1 [v] Paper Size: Letter Portrait [v]

Printer: hp LaserJet 1320 PCL 5 [F8]

Email Options

Attachments: [F8] [F8] [F8] [F8]

Subject: [F8]

File Name: [F8]

Configure [E-Mail] [PDF]

User Defined Fields

User Defined Company Address 1

Test Company

123 Main Street

Main, USA 12345

Phone

Email

User Defined Company Address 2

Test Company 2

123 Not Main Street

Main, USA 12345

Phone

Email

User Defined Footer Text

Arial [v] 8 [v]

This is the user defined footer text.

[Print] [Close]

Figure Print Screen

Depending on the Line Detail fields chosen to print, the columns will widen if room if available.
 Width and Length have been combined into one Column.
 Units now print after the Qty column.

ESTIMATE Date 09/23/15 JE100241-001 User Defined-Second Title

User Defined-Customer Title		User Defined-Project Title	
CUSTOMER LAST, CUSTOMER FIRST TEST ADDRESS 2 MAIN SOLD TEST ADDRESS 2 SOLD TEST, AL 35452		TEST ADDRESS 2 SHIP TEST ADDRESS 2 SHIP TEST, AL 35452	
Work	UD JOB #	ESTIMATE Number	UD HEADER LABEL 1
000-000-0111		JE100241-001	
Job Phone	UD MODEL	Sales person 2	UD HEADER LABEL 2
	BUNDLE		

Area	Style/Item	Color/Desc	Manufacturer	W x L	Qty	Price	Total
LIVINGROOM,DININ GROOM,BEDROOM 1,HALL	PRIVATE STYLE	PRIVATE COLOR	MANUFACTURER*	12' x 0"	0.00 SF	5.15	0.00
LIVINGROOM,DININ GROOM,BEDROOM 1,HALL	PRIVATE ITEM NAME	PRIVATE DESCRIPTION	MANUFACTURER*	7' x 50'	0.00 SF	0.59	0.00
LIVINGROOM,DININ GROOM,BEDROOM 1,HALL	PRIVATE ITEM NAME 7/16	3.5# REBOND-7/16"	MANUFACTURER*	6' x 60'	0.00 SF	0.59	0.00

Utilities

Update Contract Pricing

Utilities>Update Contract Pricing

The ability to update existing estimates to the current contract pricing for a customer has been added. Estimates can be filtered for update by Estimate Date, Start Date, End Date, Templates, Locked Status and Exported Status.

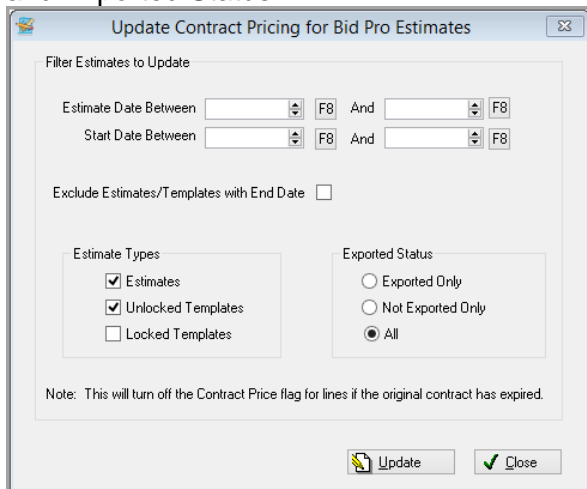


Figure Update Contract Pricing Filter Screen

Client Management

Sales Leads

Changing Sales Leads

The full Customer Name field has been added to this screen.

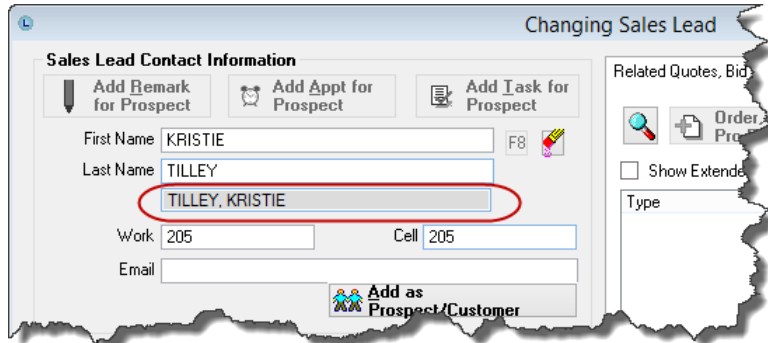
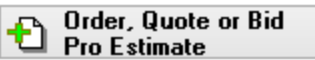


Figure Edit Sales Lead

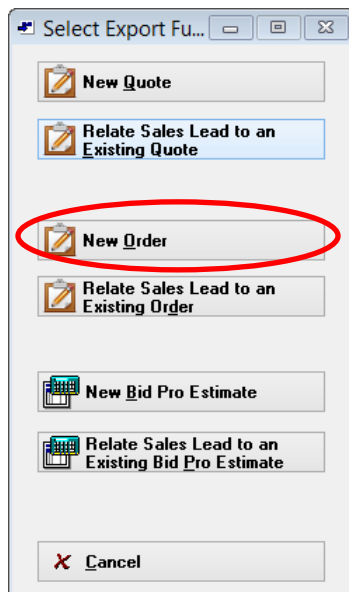
Related Quotes, BidPro Estimates and Orders Tab

Order, Quote or BidPro Estimate



The ability to add a new Order has been added.

The user will now go directly to the new record screen (Order, Quotes or Estimate) after selected one of the options below.



Copy Quote or BidPro Estimate



A copy function has been added for Quotes and BidPro Estimates.

Projects

Project Browse Screen

- Project field will now search the Project Name, Contract Number, and Job Number fields for the value entered.
- Customer field will now search the Customer Name and the Business Name fields for the value entered.
- The User field has been added to search all of the User Defined fields in the projects.
- The Baseline button has been renamed [Baseline & Financial Progress](#). From Projects, it is now Project specific not Order specific.
- The Salesperson and Project Manager have been added as filters.
- Project Standings is now viewed from the [Baseline & Financial Progress](#) screen.
- All related Overages, Add Ons, Credit Memos, Claims and Billing Group Orders will be automatically synced to the project.

The Customer Name, Business Name, Job Number, Salesperson, Project Manager and User Fields have been added as columns in the browse.

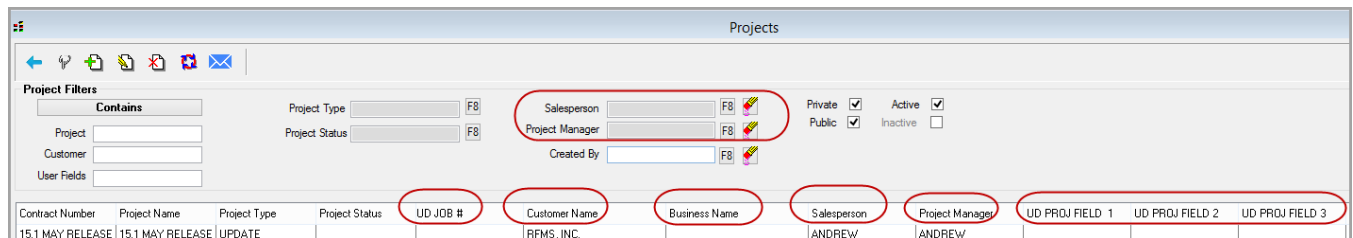


Figure Project Browse Screen

Bids Tab

The user will now go directly to the Quote/Estimate new record screen. The following information will be populated in the Quote/Estimate if it is found in the Project or Sales Lead:

- Customer Name
- Customer Address
- Ship-To Address (Sales Lead Only)
- Salesperson
- Job Number (Projects Only)
- Job Type (Sales Lead Only)
- Ad Source (Sales Leads Only)
- Store

A column has been added to show if a Quote is Original, Primary or Related. If it is a Related Quote, then the Primary Quote will be in parenthesis.

Type	Number	Bid Date	Status	Total	Job Number	Model
RELATED QUOTE (ES300133)	ES300133	04/15/13	EXPORTED	48.85		
RELATED QUOTE (ES300133)	ES300134	04/15/13	EXPORTED 04/15/13	65.14		
ORIGINAL QUOTE	ES501641	05/29/15	EXPORTED	2,469.70		
BID PRO	JE100231-001	05/29/15	EXPORTED 06/16/15	1,127.05		TEST
BID PRO	JE100250-001	12/17/15		3,603.22		TB

Figure Bids Tab

Orders Tab

The filters now default to show ALL.

Order Types have been added to the drop-down filter list.

An overage button and an Add Ons and Credit memos button have been added to the Orders Tab.

Store	Order #	Order Type	Billing Group	Order Date	Est Del Date	Delivery Date
CG502153	CG502153	ORIGINAL ORDER		12/17/15	01/19/16	

The user will now go directly to the Order new record screen. The following information will be populated in the Order if it is found in the Project or Sales Lead:

- Customer Name
- Customer Address
- Ship-To Address (Sales Lead Only)
- Salesperson
- Job Number (Projects Only)
- Job Type (Sales Lead Only)
- Ad Source (Sales Leads Only)
- Store

Add Ons, Overage and Billing Group fields have been added to the side of the Orders Tab.

Viewing Order, Quotes and Estimates

The actual order, quote and estimate screen will now open when in view mode.

Accounts Payable Tab

Records that were split from the original AP record (if the invoice prefix is the same) will now be displayed on this tab.

Workflow Actions

The Project Name and Project Type have been added to the Workflow Action screen.

Changing Workflow Action

SET UP FOR SPECIFIC PROJECT

Project: TEST FOR DOCUMENT
Project Type: HEALTH CARE

Action: UPDATE DOCUMENT
Action Type: REMARK
Remark Type: INFORMATION (F8)
Assigned To: SALESPERSON

Details
Test Test test

Automatically Create Remark on Action Date

Select Date or Event to Use to Calculate Action Date

Dates

- First Schedule Pro Line Install Date
- Last Schedule Pro Line Install Date
- First Header Order Date
- Last Header Order Date
- First Header Est Del Date
- Last Header Est Del Date
- First Header Delivery Date
- Last Header Delivery Date
- First Header Invoice Date
- Last Header Invoice Date
- First Order Line Est Del Date
- Last Order Line Est Del Date
- First Provider Installation Date
- Last Provider Installation Date
- First Quote Date
- UD PRQJ DATE 1
- First Bid Pro Estimate Date
- UD PRQJ DATE 2
- First Proposal Report Date
- UD PRQJ DATE 3
- Project Estimate Date
- UD PRQJ DATE 4
- Project Start Date
- UD PRQJ DATE 5
- Project Complete Date
- UD PRQJ DATE 6

Events

- Every New Quote
- Every New Bid Pro Estimate
- Every New Order

Number of Days Before or After Date or Event (Negative = Days Before) 0

Record Information
Date Created: 10/02/15 2:16 PM Date Edited: 10/02/15 2:17 PM Inactive
Created By: SABRINA Edited By: SABRINA

Ok Cancel

Figure Workflow Action Screen

Baseline

The CA Recycle Fee is now included on new baselines created.

Schedule Pro

Find Screens

F8 fields can now be typed in to help the search start with the closest record.

Scheduled Jobs

Version 16.1.2

File>Scheduled Jobs

The ability to view the User Defined areas from the browse screen has been added.

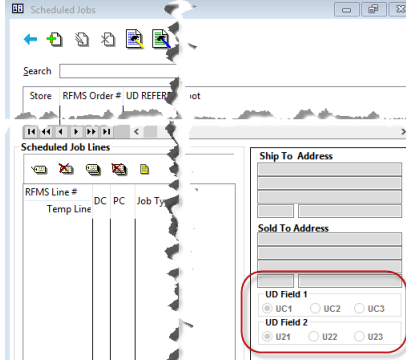


Figure Scheduled Jobs Screen

Schedule New Jobs

File>Schedule New Jobs

The tabs have been moved to a dropdown menu which is easier to maneuver with numerous job types.

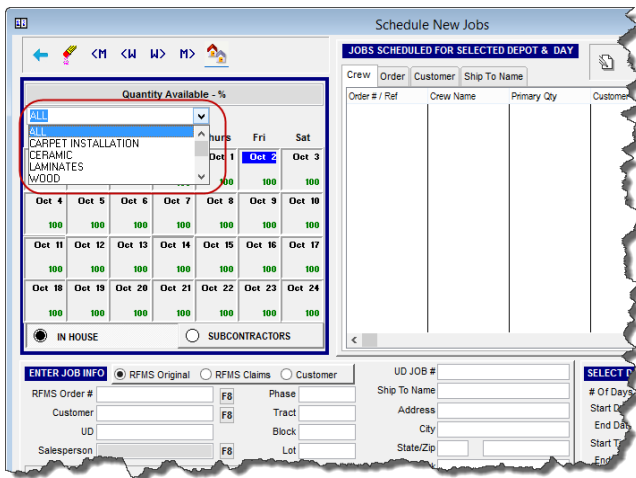



Figure Schedule New Jobs Screen

Tag All  has been added to the Select Orders to Schedule screen for the Order Lines area.

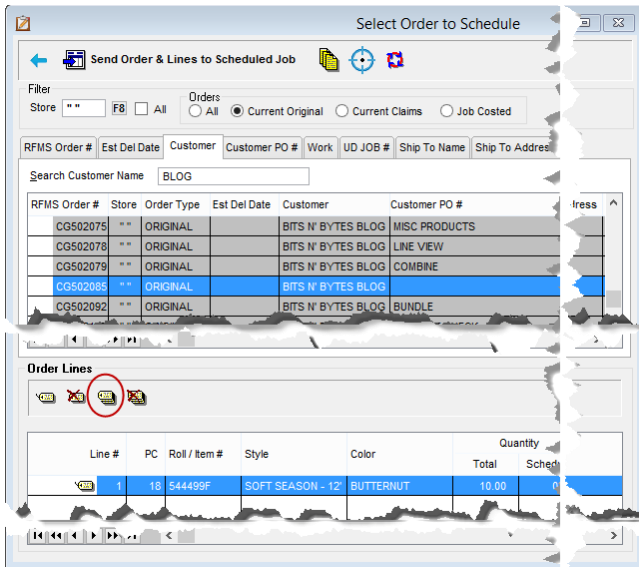


Figure Select Order to Schedule screen

Crews

[Utilities>Set Up>Crews](#)

The ability to accept or decline jobs from Installer Pro Mobile has been added to the Crew Set Up screen.

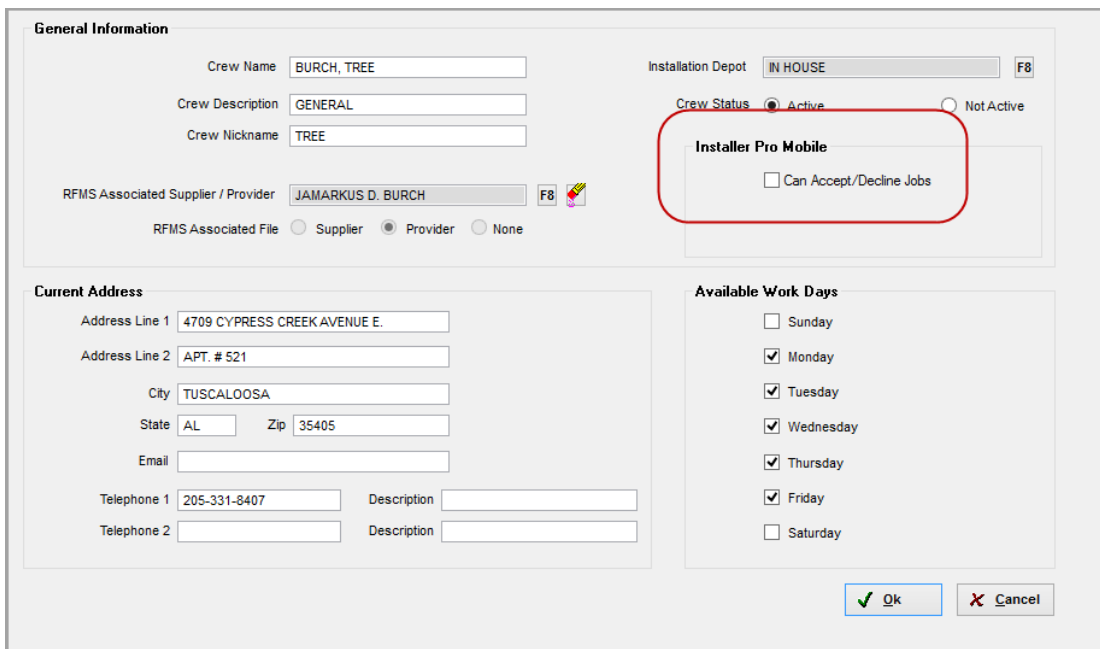
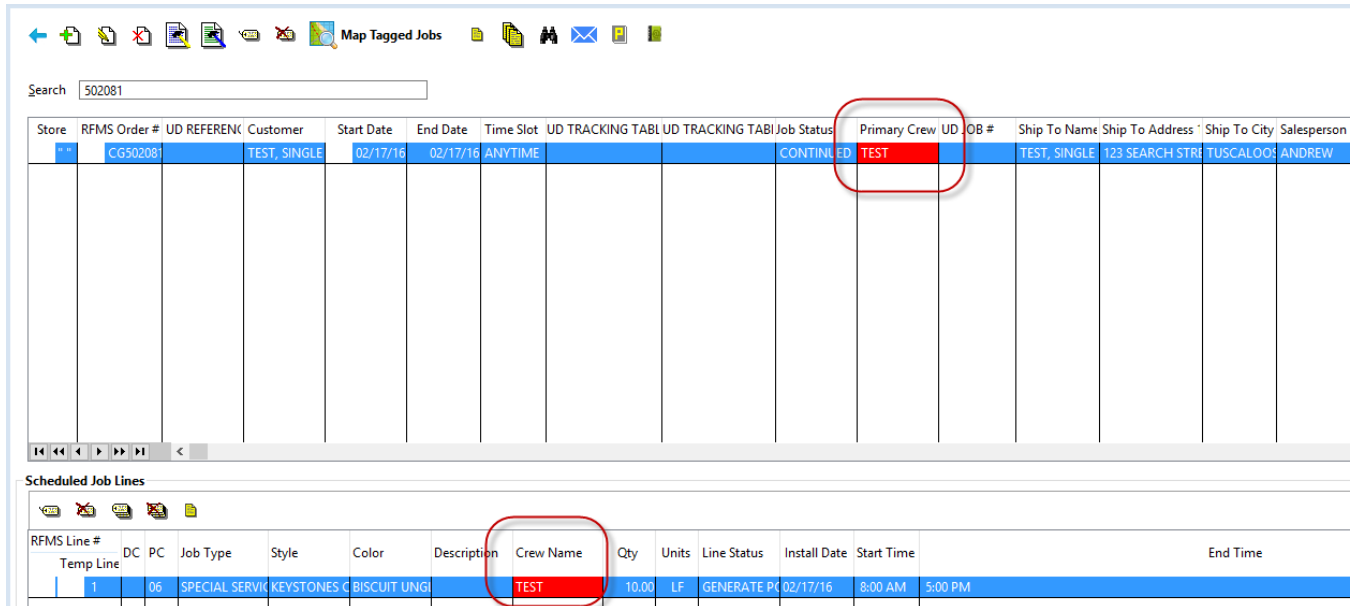


Figure Crew Set Up Screen

If the Crew does decline a job in Installer Pro Mobile, then the Crew Name area is **RED** in Schedule New Jobs Screen and Scheduled Jobs Screen.



Schedule Pro Reports and Order Entry Field Mapping

If the Customer Name is set up in [Order Entry Field Mapping](#) as “First Name, Last Name”, then the F8 button on Schedule Pro Reports will not return any results when you pick a customer from the customer file. The Customer Name will need to be manually entered or use the % sign in the search.

Reports

Daily Scheduling Report

Version 16.1.3

Reports>Daily Scheduling Reports

There is now an option to print Order Internal Notes.

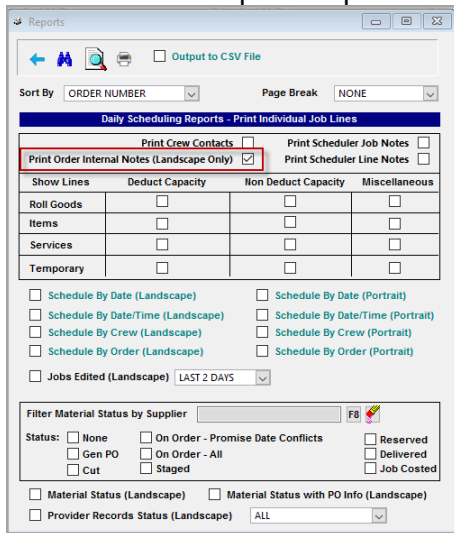


Figure Print Daily Scheduling Report Screen

Web Orders

Web Orders are created by Property Connect and RFMS Distribution Software.

Importing Web Orders has been changed. Instead of going to a browse for Web Orders, the Order

browse now has a Web Order Import button



which turns red if a web order is present. This button will:

1. Pull the next order in line
2. Add the default Sales Rep for the user as the Sales Rep for the order
3. Prevent multiple people from opening and processing the same order without knowing it
4. Prevent having to manually refresh the order browse to make sure it is current

Sales Reports

Open Orders Report

File>Sales>Open Orders

The Purchase Order Promise Date can now be found in the Roll Number field when the goods are on order.

A line has been placed between each order to make reading the report easier.

DOCUMENTATION OPEN ORDERS REPORT ** (DOCUMENTATION COMPAN) From: 01/01/15 To: 12/31/79												
PC Line	Salesperson	Customer	Style / Item	Color / Description	UD Date1	Roll / Item Number	Quantity	Units	Width	Length	Line Status	
02	0002	ANDREW	CUSTOMER LAST, CUSTOA	NASSAU TURF	01/21/16		120.00	SF	12.00	10.00	OnOrder	
03	0002	ANDREW	CUSTOMER LAST, CUSTOA	PRIVATE ITEM NAME	01/21/16		1.00	EA	0.00	0.00	OnOrder	

Inv Num: CG502028		Ship To Name: CUSTOMER, MAIN		Payment: 0.00		Balance: 646.48		%Paid: 0.00				
Order Total: 646.48												
01	0001	ANDREW	CUSTOMER, MAIN	CARPET 12'	BEIGESTONE	08/06/15	168.00	SF	12.00	14.00	Open	
01	0002	ANDREW	CUSTOMER, MAIN	CARPET 12'	BEIGESTONE	08/06/15	167.04	SF	12.00	13.92	Open	
01	0003	ANDREW	CUSTOMER, MAIN	CARPET 12'	CAROLNABLUE	08/06/15	180.00	SF	12.00	15.00	Open	
01	0004	ANDREW	CUSTOMER, MAIN	CARPET 12'	CAROLNABLUE	08/06/15	78.00	SF	12.00	6.90	Open	

Inv Num: CG502152		Ship To Name: GREEN, BRETT		Payment: 0.00		Balance: 3,220.16		%Paid: 0.00				
Order Total: 3,220.16												
02	0003	DOC TEST	GREEN, BRETT	HOME SHOWCASE - SILVER	WESTERN WORLD BUTTERS	12/16/15	131.70	SF	13.17	10.00	OnOrder	

Inv Num: CG501999		Ship To Name: LEPIANKA, BARBARA		Payment: 0.00		Balance: 646.48		%Paid: 0.00				
Order Total: 646.48												
01	0001	ANDREW	LEPIANKA, BARBARA	CARPET 12'	BEIGESTONE	03/18/15	335.04	SF	12.00	27.92	Open	
01	0002	ANDREW	LEPIANKA, BARBARA	CARPET 12'	CAROLNABLUE	03/18/15	288.00	SF	12.00	21.50	Open	

Inv Num: CG502040		Ship To Name: MAIN CUSTOMER		Payment: 0.00		Balance: 36.52		%Paid: 0.00				
Order Total: 36.52												
06	0001	BARBENA	MAIN CUSTOMER	NAPLES WALL GROUP 1	0170-BOMBAY (60)	06/22/15	0170-916	50.00	SF	0.00	0.00	Open

Inv Num: CG502063		Ship To Name: MAIN CUSTOMER		Payment: 0.00		Balance: 1,067.32		%Paid: 0.00				
Order Total: 1,067.32												
80	0003	BARBENA	MAIN CUSTOMER	URGENT		07/22/15	URGENT	1.00	EA	0.00	0.00	Open

Figure Open Orders Report

ERRM

Express Checkout

Express Checkout can now be used on ERRM Orders. If the Order can be job costed, Express Checkout will bill, book and job cost the order. If the Order is partially through the ERRM process, Express Checkout will pick up and finish.

Batch Job Costing

Batch Job Costing is now compatible with ERRM.

Every Order that is ready to job cost and meets the criteria set by Batch Job Costing will be job costed. An Eligible order will be job costed starting from whatever state it is in (All lines ready, billing or booking). If there are orders that should be handled individually, they can be segregated by Store, Customer Type or Sales Representative.

Installer Pro Mobile

Users

Decline Jobs

Users can now decline jobs if Can Accept/Decline is checked in the Crew Record screen (*Utilities>Set Up>Crews*) in Schedule Pro allows it.

The screenshot shows the 'RFMS Schedule Pro for DOCUMENTATION - [Changing Crew Record]' window. The interface includes a menu bar (File, Edit, Reports, Utilities, Window, Help, Mail, Navigator) and several input fields. The 'General Information' section contains fields for Crew Name (TEST), Crew Description, Crew Nickname, Installation Depot (SUBCONTRACTORS), Crew Status (Active/Not Active), RFMS Associated Supplier / Provider (TEST CREW), and RFMS Associated File (Supplier, Provider, None). The 'Current Address' section has fields for Address Line 1 (123 TESTING), Address Line 2, City (TEST), State (AL), Zip (12345), Email, Telephone 1 (2051234567), and Telephone 2. The 'Available Work Days' section has checkboxes for Sunday through Saturday, with Monday through Friday checked. A red box highlights the 'Installer Pro Mobile' section, which contains a checked checkbox for 'Can Accept/Decline Jobs'. At the bottom right, there are 'Ok' and 'Cancel' buttons.

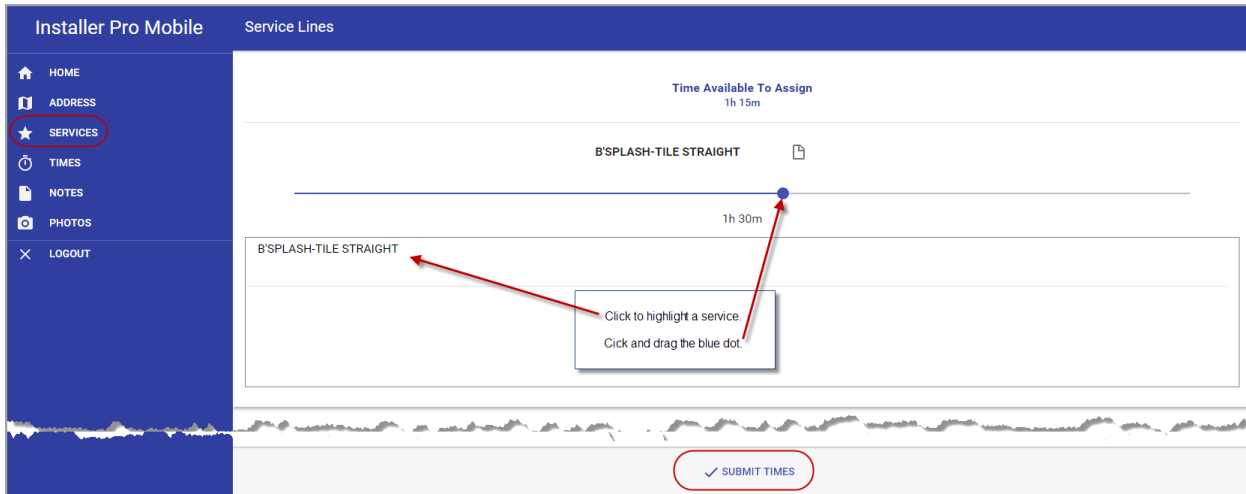
Users can only decline jobs that have scheduled starts dates that being after the current date.

Home Screen

The invoice number is now shown on the home screen.

Services

The services on the order are displayed in this area. The worker can set the time spent on a job by clicking the service and dragging the blue dot. Click Submit to use the times to create a provider record in Schedule Pro (*Schedule Pro>File>Create Provider Record*)



Product Gateway

Prices

Customers can add price to a gateway product on the CCA website and that will then be imported in to RFMS is selected