



KEY FEATURES IN SCHEDULE PRO

Presented by Bruce Bloomer

bbloomer@rfms.com

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OVERVIEW

RFMS Schedule Pro can make managing the installation process a simpler task by incorporating specialized tools & features which allow users to quickly schedule and track jobs and crews. It is built to completely integrate with RFMS Order Entry and gives users the ability to measure installation capacity, increase productivity, and ultimately improve customer service.

Since the initial scheduling process begins with the sales staff during the sale it can streamline coordination of the installation with the client. It is recommended that all sales staff obtain a request date from the customer and create Schedule Pro Alerts. Other features expedite scheduling, confirming and communicating the installation details using alerts and emails. Finally, the scheduling reports will enable management to track productivity and follow up, including the use of optional Tracking Tables.

KEY FEATURES IN SCHEDULE PRO

Overall Functionality

- Schedule any type of product installation
- Assign a specific crew or crews to a job
- Accurately post installation costs
- Automatically create providers records
- Report on all present and future installation related tasks

Capacity Calculations

- Built-in formulas prevent overbooking
- Capacity by crew, installation depot, or day
- Calculate by number of crews available each day

Crews

- Optional Skill Levels for each crew according to Job Type
- Set the daily quantity each crew can install
- Import from RFMS Personnel or Suppliers files

Scheduling

- Easy to read calendar and grid format
- Drag and drop to easily change job schedule
- Import existing RFMS order information
- Update scheduled jobs when changes occur

PREREQUISITES

- Basic knowledge of RFMS Order Entry & Workflow
- Schedule Pro must be installed and licensed
- Ability for Salespeople to create Schedule Pro Alerts for Jobs needing to be scheduled
- Require use of Estimated Delivery Date
- Establish a thorough setup of Schedule Pro to access to all of its many features
- Schedule each Job with as much detail as possible for enhanced reporting capabilities

WEBINAR OUTLINE

- Schedule a Job with Alerts, Manually, or Temporarily
- Assign Multiple Crews to a Job
- Assign Multiple Products to a Job
- Interactive Weekly Grid
- Automatically Create Provider Records
- Report on Material Statuses
- Report Daily Crew Schedule

SCHEDULE A JOB

SET ALERT FOR ORDER TO BE SCHEDULED THROUGH A CENTRALIZED ALERTING SYSTEM

- Pick up the Alert
- Select Dates and Time
- Select Tracking Information
- Select Crew
- Add to Calendar

MANUALLY SCHEDULE ORDER TO PROVIDE FOR MORE FOCUSED CONTROL

- Select Order to be Scheduled from Calendar
- Tag Lines to be Scheduled for Installation
- Check Installation Availability for Selected Date
- Select Date, Time, and Crew for Job
- Add to Calendar

TEMPORARILY SCHEDULE ORDER TO RESERVE FUTURE INSTALLATION DATES

- Enter Job Information for Customer Without an Order Being Created
- Create Temporary Line(s) Indicating the Job Type and Estimated Quantity
- Associate Actual Order with Temporary Order Once Created
- Locate Actual Order and Tag Appropriate Lines
- “Send Over RFMS Order and Lines to Schedule Job”

- ✚ Best Practice-By centralizing all scheduling tasks, the company has one point of contact to manage installation expectations and realizations for the company as well as the customer.

ASSIGN MULTIPLE CREWS AND PRODUCTS ON A JOB FROM A SINGLE SCREEN

ACCESS THE EDIT AND COMPLETE SCREEN FOR AN INDIVIDUAL JOB

Weekly Grid / Job List Screen /Schedule New Job Screen

- Select Split Line Tool Button for Multiple Crew Assignment
- Edit the Number of Days and Add Crew Assignments
- Apply Labor Split

- ✚ Best Practice-With the ability to assign multiple crews to an individual installation, the company can better manage resources and the timely completion of a multi-phase job

INTERACTIVE WEEKLY GRID PROVIDING EASE OF SCHEDULING

“DRAG AND DROP” SCHEDULED JOB TO THE APPROPRIATE INSTALLATION DATE

- Change Dates
- Change Crews

PRINT GRID FOR ALL PARTIES

- ✚ Best Practice-An interactive grid allows a user to create, manage, and execute an installation with more controls and insight into the jobs that lie ahead

AUTOMATICALLY CREATE PROVIDER RECORDS

- Select Installation Dates to Post for desired Pay Period
- Filter by Crew for a thorough Audit of Completed Jobs
 - Only for Records Not Created
- Tag Appropriate Records to post Installation Costs to Order
- Select “Create Provider Records for Tagged Lines” to execute
- Warning for Unassigned Crews Displayed
 - Assign Crew in Schedule Pro
 - Assign Crew to Provider Record in RFMS
- System will automatically change line status for associated lines to CUT or DELIVERED

- ✚ Best Practice-With the ability to automatically post labor costs to an order it eliminates an entire step of processing each installers bill which expedites the job-costing process.

REPORT ON MATERIAL STATUS

- Set Date Range and other Filters to narrow Reporting Criteria
- Check boxes for Appropriate Material Classification
 - Rolls/Items
 - Deduct versus Non-Deduct Capacity (Include Both)
 - Must Tag Material Lines during Scheduling to have Displayed on Report
- Select Material Status with PO Information report (Landscape)
- Print

REPORT ON DAILY CREW SCHEDULE

- Set Date Range and Other Filters to narrow Reporting Criteria
- Daily Schedule Report
- Job Summary Detailed 3 (Landscape)
- “Output to CSV File” option
- Print

✚ Best Practice-Enhanced reporting capabilities provide the company with a better perspective on installation volume, productivity and missed opportunities

SYSTEM OPTIONS & SET UP

Schedule Pro System Options considerations:

- Create Schedule Pro “TO BE SCHEDULED” Alert for users that to generate alerts.
- Display Schedule Pro Alerts on Order Entry Browse
- Weekly Grid - “Enable Drag and Drop” , Show Material Status Deltas, Show Crew Availability Dots
- Automatically Tag All the Order Lines on Scheduling
- Create Providers Earnings Records for Labor Lines with No Crew – Set to WARNING
- Automatically set lines to DELIVERED
- Allow Providers Rate Override- Access Code required to activate this feature

Schedule Pro-Utilities Set Up

- Establish job Types, Associated Product Codes, Deduct Capacity Product Codes
- Establish Job Statuses for stages of scheduling process
- Establish Installation Depot, Crews, Crew Capacities

SCHEDULE PRO WORKFLOW

SCHEDULE JOB

- 1- Alert Set for Requested Installation Date (Est Del Date)
 - a. Multiple Schedule Dates- Internal Notes indicate what dates for each phase
- 2- Job put on schedule based on date requested,
 - a. IF material line(s) from Order Entry in GEN PO status the Schedule Pro default status should be left as **SCHEDULE REQUESTED** or **TENTATIVE**
- 3- Once or twice a day filter scheduled jobs by “Schedule Requested” Status.
 - a. Review line statuses to see updated line status from Gen PO to On Order.
 - b. Review the **Promise Date** for the material to confirm meets 2-day prior to installation date deadline.
- 4- Contact customer to confirm the installation date desired.
 - a. Review any details of installation as needed
 - b. Email client reminder of installation appointment as well as documents to review prior to installation (“How to prepare for your floor covering installation” etc)
- 5- Change Schedule Pro Status to **SCHEDULED**

GET READY FOR INSTALL

- 6- Material Status Report generated to track materials 2-3 Days prior to installation date
- 7- Call customer to confirm installation 24 hours prior to installation.
 - a. Discuss normal installation preparation for the type of job being installed.
 - b. Review the scheduled job for any extraordinary things the client was supposed to perform, usually indicated with a service line indicating what is their responsibility (client to remove existing material or client to remove and replace furniture, etc). Confirm the client has completed the necessary work and is ready for installation
 - c. Discuss balance due and review policy regarding collecting COD
 - d. Make notes of the conversation in Scheduler Notes section
- 8- Change status to **CONFIRMED**
- 9- Generate Installation Job Packet
 - a. Work Order for customer sign off
 - b. Work Ticket for installer’s copy
 - c. Tag jobs for Installer to generate Map. (if multiple jobs being performed during a day from one jobsite to the next)
 - d. Print Diagram (Open scheduled job- click on View Order- Open attachments- find diagram and print)
- 10- Add additional flags in Tracking Tables (Material pick up, Material Not Ready etc)

DISPATCH CREWS

- 11- Print Grid as a guideline to expedite loading crews
- 12- Collect PREVIOUS job's work orders, work tickets, COD's prior to releasing NEW installation job packet
 - a. Note material changes on Work Ticket/Pick Ticket
 - b. Note job site changes on Work Ticket (job not ready, reschedule, inspect, etc)
 - c. **SPECIAL NOTE: Additional Charges** phoned in throughout the day should be added to the schedule and a Work Ticket generated in advance to check the installer back in with complete documentation
 - d. Additional Work Tickets prepared given to installer for review and sign off

UPDATE SCHEDULE/ORDERS

- 13- Collate Work Tickets/Install Bills into two categories
 - a. Work Tickets-NO Changes
 - b. Work Tickets- WITH Changes
- 14- Go to Quick Edit to Update Statuses
 - a. Change today's jobs status to **IN PROGRESS**
 - b. Change jobs turned in status as needed (**PHASE COMPLETE, JOB COMPLETE, RESCHEDULE, INSPECT**, etc)
 - c. Add Tracking Table Follow up as needed (Installer Bill Needed, Repair Needed, Change Order Pending)
- 15- Create Providers Earnings
 - a. Filter by Status if required for job completion to be confirmed prior to earnings being posted. (Phase Complete and Job Complete)
 - b. Post Earnings for Work Tickets with NO Changes
 - c. Post Earnings for Work Tickets WITH Changes
 - ONLY if access to Order Entry is available to make necessary corrections
(Since additional charges should be added while installation is still being performed the only changes that would be necessary would be to reduce qty, rate due to job site difficulties)