ADVANCED ORDER ENTRY

May 10, 2018
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Trainer & Consulting

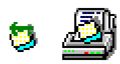
Overview

Using advanced features in Order entry can streamline overall processing time. There are several Order Entry / Quotes options and features that make generating orders and quotes much more efficient. They provide an extra layer of information and assistance for more complex orders, and just generally assist you manage your data. Other advanced features provide an extra layer of information needed for more complex orders.

Outline

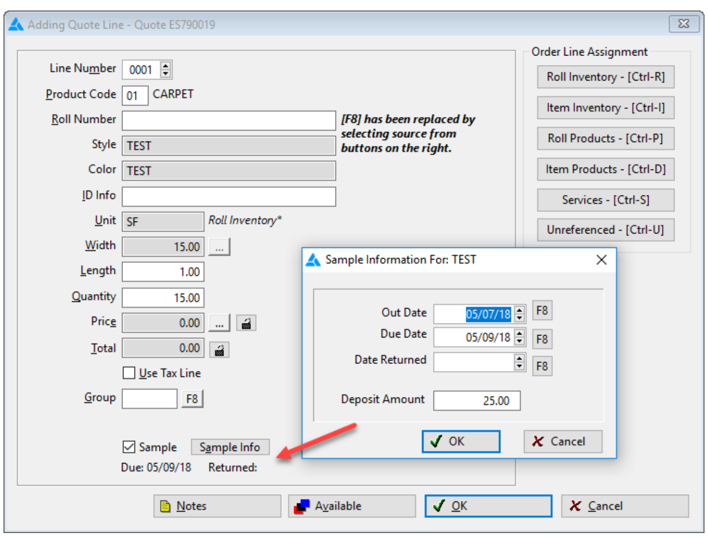
- SAMPLE CHECKOUT
- BUNDLES & TEMPLATES
- SPLITTING & COMBINING LINES
- LINE GROUPING
- ADDITIONAL INFORMATION
- LOCKING FIELDS
- PRINT OPTIONS
- ORDER TRACKING & PDF HISTORY
- BASELINE
- ACCOUNTS RECEIVABLE
- CMM INTEGRATION
- OVERAGES
- ADDITIONAL & SPLIT COMMISSIONS
- BILLING GROUPS
- PRODUCT DRIVEN ORDER ENTRY
- BATCH JOB COSTING
- ORDER ENTRY REPORTS
- CUSTOMER PICK UP
- WORD MERGE
- COPY BROWSE SCREEN
- SPECIAL PO INFORMATION
- CUSTOMER SAME NAME
- BATCH PRINTING
- RFMS SMART SEARCH

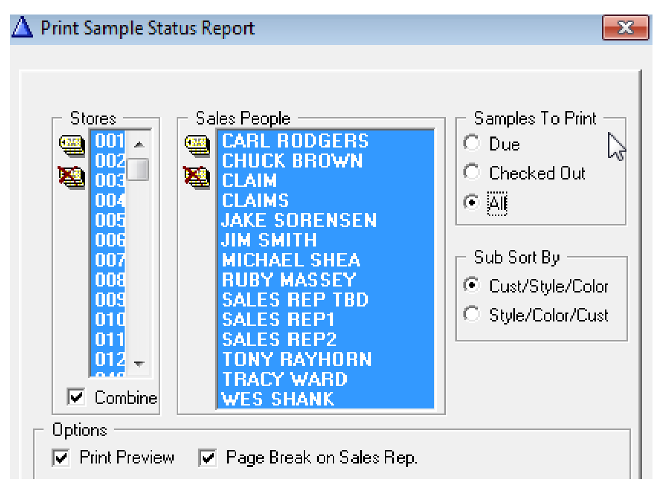
Sample Checkout



Samples are entered on a quote just like a regular line. If you use barcoding, samples can be entered into your inventory and then scanned when entering the quote line. Or, you can simply enter a line and indicate that the line represents a sample. To check out a sample:

1. In the Quotes module, click on the green plus sign to insert a Quote.
2. Enter the Customer Information.
3. Fill in estimated install/delivery date, salesperson and customer type.
4. Insert line and choose the product and color the customer is most interested in.
5. Enter a quantity of one.
6. Click on Sample box.
7. The Sample Information box appears defaulting to the current date ‘Out’ date and a ‘Due’ date of two days later. These dates can be overwritten
8. Fill in the deposit amount, if any.
9. Click OK. Notice that the Sample line is now green and shows sample icon to the left of the line.
10. To return sample, double-click on the sample line, click on Sample Info and enter return date or simply unclick Sample and click on Return.





A report can be generated to see what samples have been checked out or what samples or due or both. Select parameters to include stores and salespeople desired, how to sort it and to run a page for each salesperson individually

Page No: 1
05/07/18
04:43PM

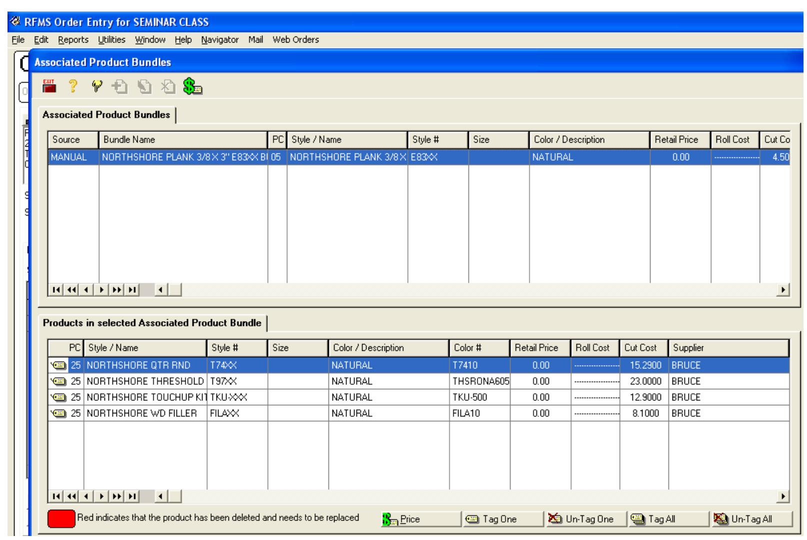
Store: Combine

SEMINAR CLASS
SAMPLE STATUS REPORT
Due
Sub Sort By: Customer/Style/Color
"*" denotes that sample is due

	Quote #	Customer	Style	Color	Out	Due	Returned
		Sales Rep: CINDY THOMPSON					
*	ES890001	TOLL BROTHERS	FIESTA TEXAS	CONFETTI	05/01/18	05/04/18	
	Phone: 555-555-8101						
	Email: TOLLBRO@SHOWROOM.COM						
*	ES790020	VARNEY, SUSAN	SUGAR MAPLE	0719160	05/02/18	05/04/18	
	Phone: 555-555-4697						
	Email: susan@emailaddress.com						
		Sales Rep: DONNA					
*	ES690015	CUNNINGHAM, JAMES	CANYON CREST	INDIAN CORN	03/30/18	04/01/18	
	Phone: 555-555-8521						
	Email: JAMES@EMALADDRESS.COM						

Using Bundles and Templates

Bundle Template



Bundles and Templates are grouping of either specific products and their matching pieces, or a generic listing, created in Products, to help you remember all of the steps in a process. Associated product templates are also called bundles. The product bundles may be downloaded directly from B2B or another product service, or you can build a product template in Products. When a product template is available, you are alerted in Order Entry.

Splitting Lines

To split an existing line, click on the Split Lines button that is located just below the customer order line area on the customer order.

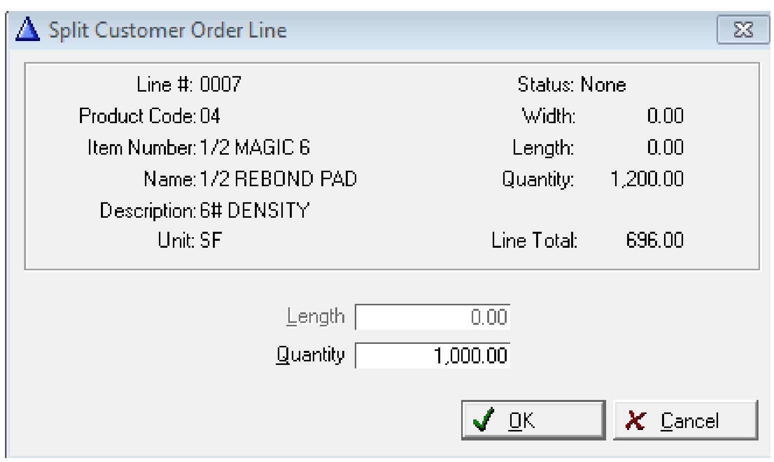
This function is applicable for items and labor (product codes 03-99) and for roll goods (product codes 01 and 02), provided the roll line has not been assigned.

Before you split a line, lock the line total on the original line to prevent a change in the invoice total from rounding errors This function may also be helpful when doing Partial Billings. You may divide original line entries and assign only those portions that you wish to bill for.

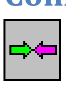
For example, one of your line entries may be for 200 yards of pad. When assigning there may be several different inventory records for the same pad, each with only a small amount available. If there are 40 yards on one record, 50 on another instead of adding new lines to the order, you can "split" the line.

Enter the quantity of for amount desired and the system will create a new line for with the identical information as the original. Those lines can then be assigned to the inventory records you wish to use.

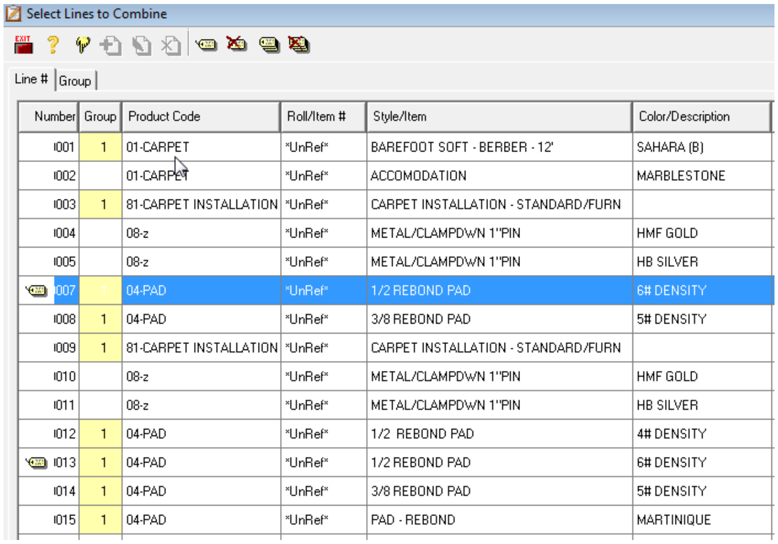
If you split a line that is linked to a work order line, you must regenerate the work order line after the split. Area and notes on the work order line do not split.



Combining Customer Order Lines



The lines to be combined must be in a none status. Combines TAGGED lines. The lines must be the same style, product code, color. Lines can't be combined unless they are exactly the same (not including area name). The areas for both the lines are put on the combined record.



Select Lines to Combine

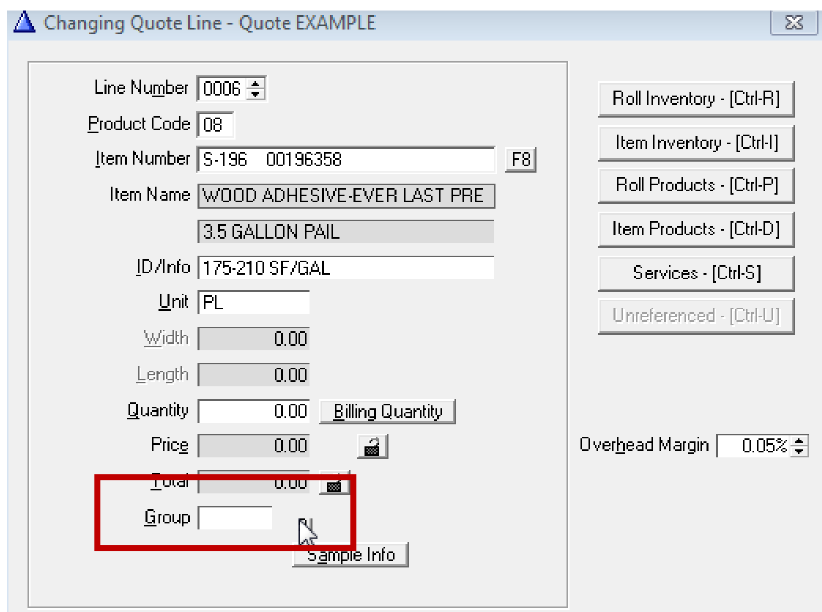
Line # | Group

Number	Group	Product Code	Roll/Item #	Style/Item	Color/Description
0001	1	01-CARPET	*UnRef*	BAREFOOT SOFT - BERBER - 12'	SAHARA (B)
0002		01-CARPET	*UnRef*	ACCOMODATION	MARBLESTONE
0003	1	81-CARPET INSTALLATION	*UnRef*	CARPET INSTALLATION - STANDARD/FURN	
0004		08-z	*UnRef*	METAL/CLAMPDWN 1"PIN	HMF GOLD
0005		08-z	*UnRef*	METAL/CLAMPDWN 1"PIN	HB SILVER
0007		04-PAD	*UnRef*	1/2 REBOND PAD	6# DENSITY
0008	1	04-PAD	*UnRef*	3/8 REBOND PAD	5# DENSITY
0009	1	81-CARPET INSTALLATION	*UnRef*	CARPET INSTALLATION - STANDARD/FURN	
0010		08-z	*UnRef*	METAL/CLAMPDWN 1"PIN	HMF GOLD
0011		08-z	*UnRef*	METAL/CLAMPDWN 1"PIN	HB SILVER
0012	1	04-PAD	*UnRef*	1/2 REBOND PAD	4# DENSITY
0013	1	04-PAD	*UnRef*	1/2 REBOND PAD	6# DENSITY
0014	1	04-PAD	*UnRef*	3/8 REBOND PAD	5# DENSITY
0015	1	04-PAD	*UnRef*	PAD - REBOND	MARTINIQUE

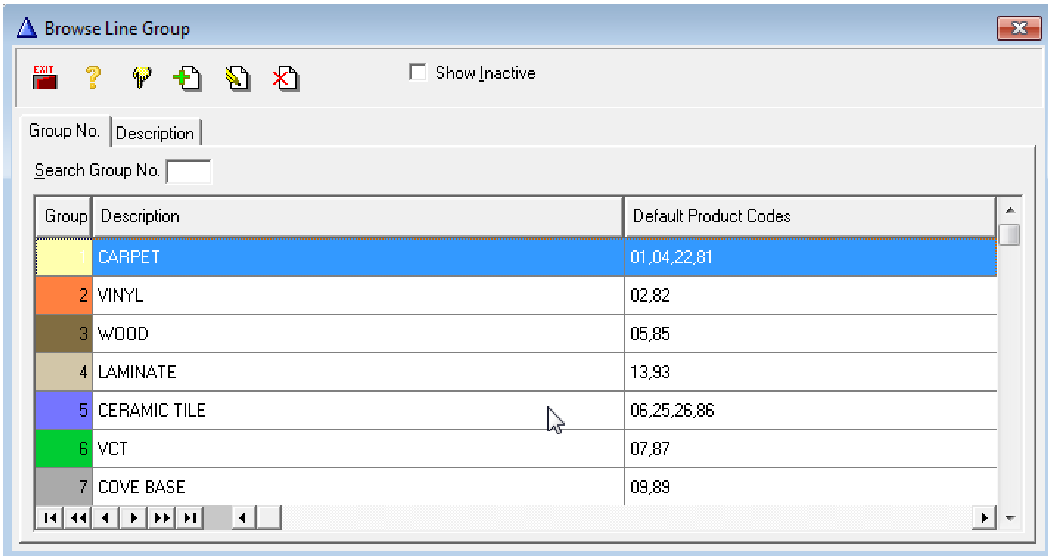
Line Grouping

A Group tab has been added to the browse which will present the Lines in Line Group Order. If an Order Line is not specifically assigned to a group, it will be automatically assigned to "Line Group None"

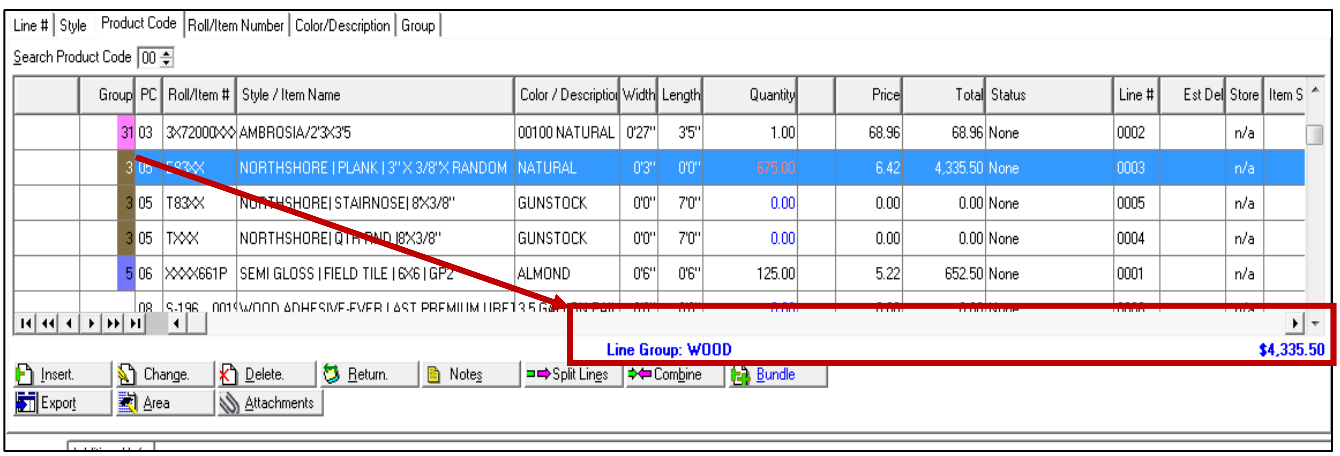
When adding a new order line click on F8 to change the Group or to add another group.



The dialogue box will appear to select the Group desired to be associated with the line. If Default Product Codes are set up the Group will automatically be populated based on that mapping.

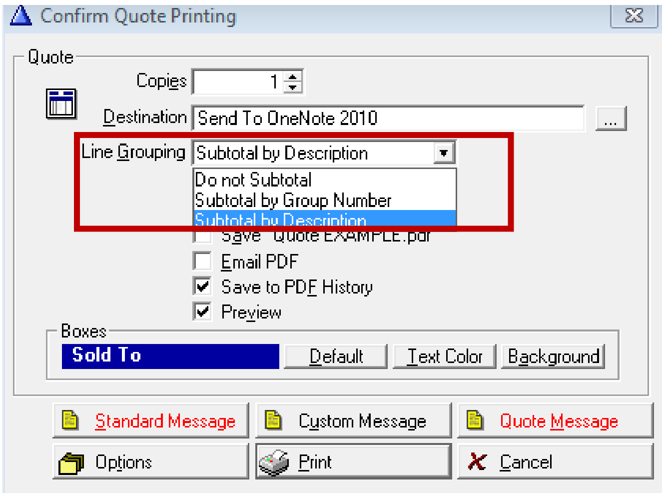


Also, note that below the browse, it shows the Line Group Description as well as the total of Lines for the highlighted group. Highlight a record and the Line Group Total will be displayed at the bottom of the line browse screen.



Printing with Sub Total (Line Grouping Feature)

Printing for Invoice / Acknowledgement, Estimate or Claims all have the same “Line Grouping” feature added. If the Lines for the document being printed do have Line Groups specified, Line Grouping will be enabled and will be set to the last grouping request for that type of document.



SEMINAR CLASS
3073 PALISADES CT
TUSCALOOSA, AL 35405
Telephone: 210-555-1217

Page 1 | **QUOTE** | **ES890002**

Sold To

NEW CUSTOMER INC
123 NOWHERE LANE
SAN ANTONIO, TX 78216

Ship To

NEW CUSTOMER INC
123 NOWHERE LANE
SAN ANTONIO, TX 78216

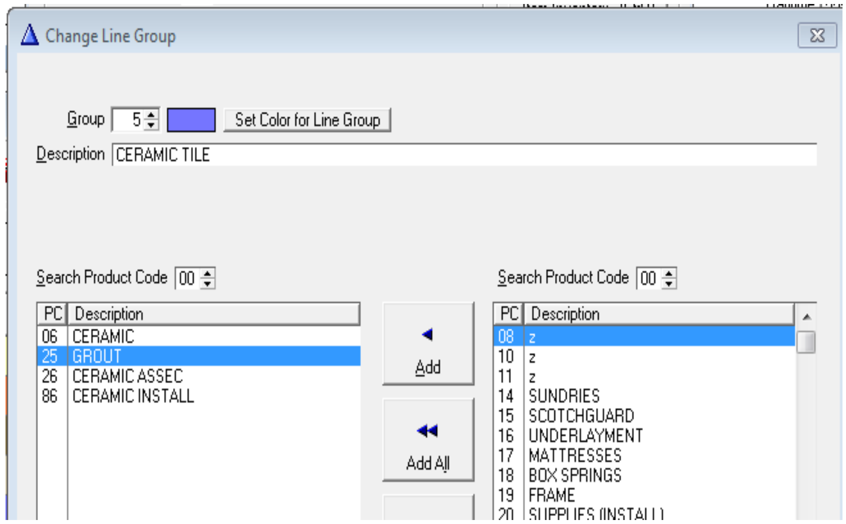
Order Number	Order Date	PO Number	Phone
	05/07/18	2242	555-123-4567

Area	Inventory	Style/Item	Color/Description	Quantity Units	Price	Extension
#1 - CARPET						
		128 GRAPHIC LOOP	TEAL/MAUVE	900.00 SF	9.00	8,100.00
	147423	750 SOOPER DOOPER	SPILL GARD	100.00 SY	8.00	800.00
						8,900.00
#3 - TILE						
	874927-A	FIESTA TEXAS 1212	CONFETTI	200.00 SF	7.00	1,400.00
						1,400.00
#5 - SAMPLE ONLY						
	874927-A	FIESTA TEXAS 1212	POLTERGEIST	1.00 SF	0.00	0.00
	874927-B	FIESTA TEXAS 1818	CROWS NEST	1.00 SF	0.00	0.00
						0.00

Set up Line Grouping

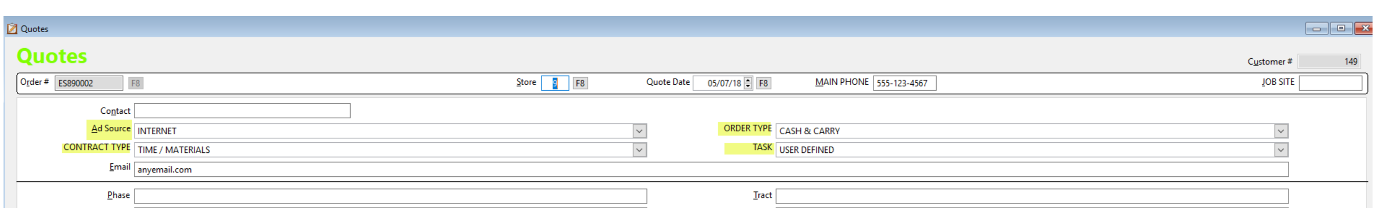
From the Group F8 click on the ADD button to generate a new Group Description and color.

The Group can be associated with Default Product Codes that will automatically populate the group when that product code is selected. In some cases a product code may have multiple surfaces it can be associated with (i.e. adhesives, cove base, underlayment) so those would be left blank so the user can associate them with the group that material is being used with.



Additional Information Tab

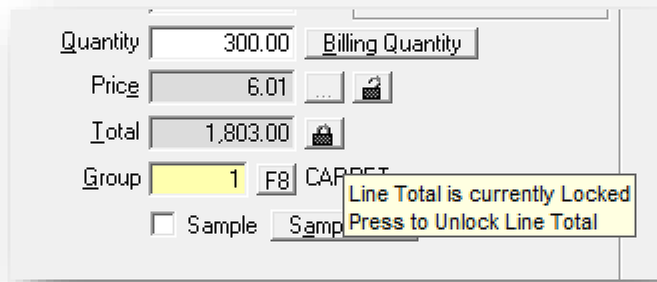
These fields allow users to specify more information on each order and allow you to run reports based on that information. These fields are user defined by their drop down choices. Titles of all except ad source can be changed from the Public Parameters. The choices are built from the File menu. Reports are currently in development but information is available now by printing the Material Analysis report to CSV file.



Locking Fields

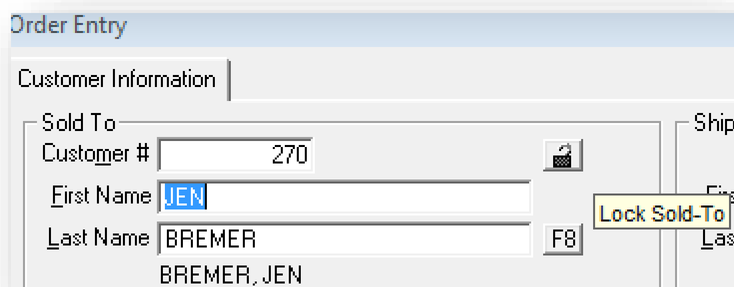
Sold to, Sales Reps, Tax Status and Line Total/Unit Price can all be locked by using the padlock icon. It is recommended that a password be set to unlock the padlock button. Locking the field prevents it from being changed either directly or by changing another aspect of the record.

Quote or Order LINE



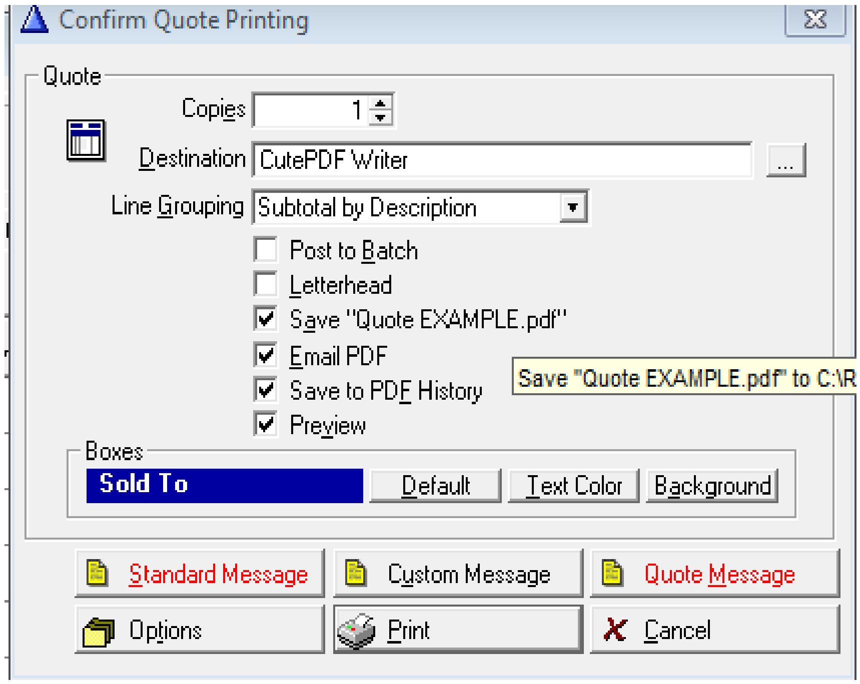
Tax Status on Quote or Order

Sold To Section of Quote or Order



Print Options - NEW Save as file or PDF History and Email

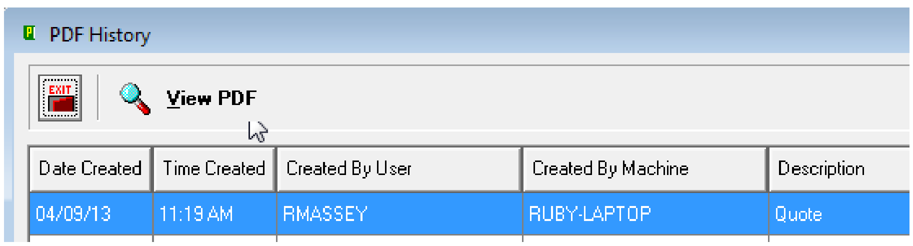
The ability to email a quote or order directly from the print option screen has been added. It is now possible to automatically save the order as a PDF record in the default RFMS directory without any additional effort. There is also the option to save the document to PDF history where it can be referenced or reprinted at any time.



For Email PDF functionality to work properly the users email configuration must be set up in System Options/Users/Email Configuration

PDF History

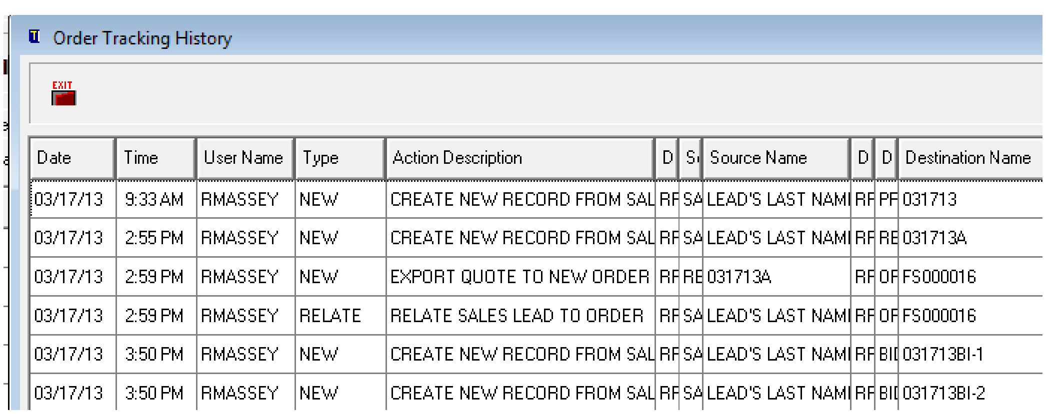
Users will easily be able to browse the PDF History and view each of the reports that have been printed for an order, quote, job etc... To see the pdf history, click the pdf button. If there are no pdf files attached the button will be gray. To view the actual record, click the view button. This will actually launch PDF document for all functionality available with the version installed on the workstation or server



Tracking History

Users will be able to browse Order Tracking information on every record insert made into Orders, Quotes and Bid Pro Estimates. Order Tracking Information will only be fully populated from the 10.6 install forward. Click the Order tracking button to see history.

To see the full history, check the show extended view box. This will show other orders, quotes and bids that are a source or destination related to this record.



Baseline

This screen allows you to create a baseline for the highlighted customer order or the billing group that order is a part of. The baseline is a "snapshot" of the order at that moment in time. You may also print a report that compares a previous baseline with the order in its current status. You can use your baseline points to compare how a job is doing over a period of time and the final quantity, cost, selling price and gross profit percentage.

BASELINE COMPARISON

For Invoice #: 081710

Style/Item Comparison

	Baseline Qty	Actual Qty	Baseline Cost	Actual Cost	Baseline Sell	Actual Sell	Baseline GP	Actual GP	Variance GP
50.000% BILLING	0.00	-2.00	0.00	-3,400.000	0.00	-4,000.000	0.00	15.00	15.00
1/2 REBOND PAD	0.00	26.67	0.00	29.07	0.00	44.80	0.00	35.12	35.12
1/2 REBOND PAD 4#	26.67	0.00	26.40	0.00	44.80	0.00	41.07	0.0	0.00
ADHESIVE	0.00	0.00	0.00	0.00	0.00	0.00	-100.00	0.0	0.00
BEAUTIFUL EVENING	33.90	33.88	442.39	487.13	0.00	0.00	-100.00	-100.00	0.00
BELLAGIO/12X12 FL	100.00	100.00	335.00	335.00	1,000.000	1,000.000	66.50	66.50	0.00
CARPET INSTALLATION - STANDAF	26.67	26.67	106.68	106.68	177.88	177.88	40.03	40.03	0.00
CERAMIC INSTALLATION/RESIDEN	100.00	100.00	500.00	500.00	1,000.000	1,000.000	50.00	50.00	0.00
FAB-C&C MACHINE TIME	100.00	0.00	300.00	0.00	700.00	0.00	57.14	0.0	0.00
MEASURE FEE	0.00	0.00	0.00	0.00	0.00	0.00	-100.00	-100.00	0.00
METAL	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Baseline VS Progress

Order Numbe 081710
Baseline Create 08/17/10

	Baseline	Delivered		Undelivere	Current	Variance to Baseline	Payment Information	
Contract Total	7,275.23	2,575.23	35.40%	0.00	2,575.23	(4,700.00)	Contract Total	2,575.23
Change Orders	0.00	0.00	0.00%	0.00	0.00	0.00	Change Orders	0.00
Grand Total	7,275.23	2,575.23	35.40%	0.00	2,575.23	(4,700.00)	Grand Total	2,575.23
Material Cost	2,221.29	(173.32)	-7.80%	0.00	(173.32)	2,394.61	Delivered	2,575.23
Service Cost	1,685.68	500.68	29.70%	0.00	500.68	1,185.00	Delivered Retainage	0.00
Overhead Margin	205.61	17.20		0.00	17.20	188.41	Payments	0.00
Freight Cost	0.00	47.67		0.00	47.67	(47.67)	Current Balance	2,575.23
Tax Cost	0.00	0.00		0.00	0.00	0.00		
Gross Profit	3,162.65	2,183.00		0.00	2,183.00	979.65		
Net Sale	7,275.23	2,575.23		0.00	2,575.23	4,700.00	Project Balance	2,575.23
Gross Profit %	43.47%	84.77%		0.00%	84.77%	41.30%		

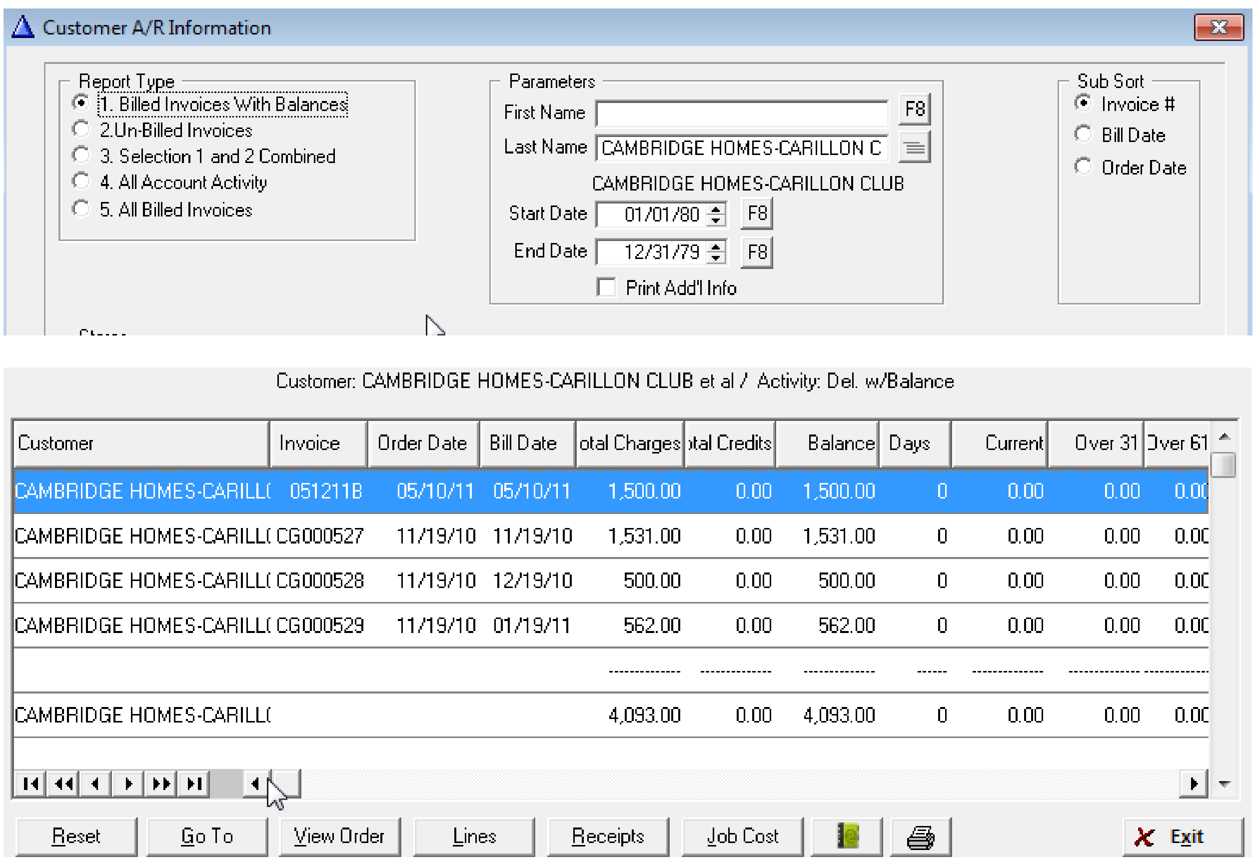
Discrepancies Between Baseline and Actual Order Lines

For Invoice #: 081710

Line Type	Order	Line	PC	Roll / Item Number	Style	Color	Supplier	Qty	Line Total
Baseline	081710				NO BASELINE			0.00	$0.00
Actual	081710	19	08	S-196 00196358	WOOD ADHESIVE-EVER LA	3.5 GALLON PAIL	TRI WEST	2.00	$0.00
Baseline	081710				NO BASELINE			0.00	$0.00
Actual	081710	20	50		50.000% BILLING	AUGUST 17, 2010		1.00	$3,000.00
Baseline	081710				NO BASELINE			0.00	$0.00
Actual	081710	21	98		50.000% BILLING	AUGUST 17, 2010		1.00	$1,000.00
Baseline	081710				NO BASELINE			0.00	$0.00
Actual	081710	22	80	TRIP1550	TRIP CHG/15-50 MILES		ALL INSTALLERS	1.00	$0.00

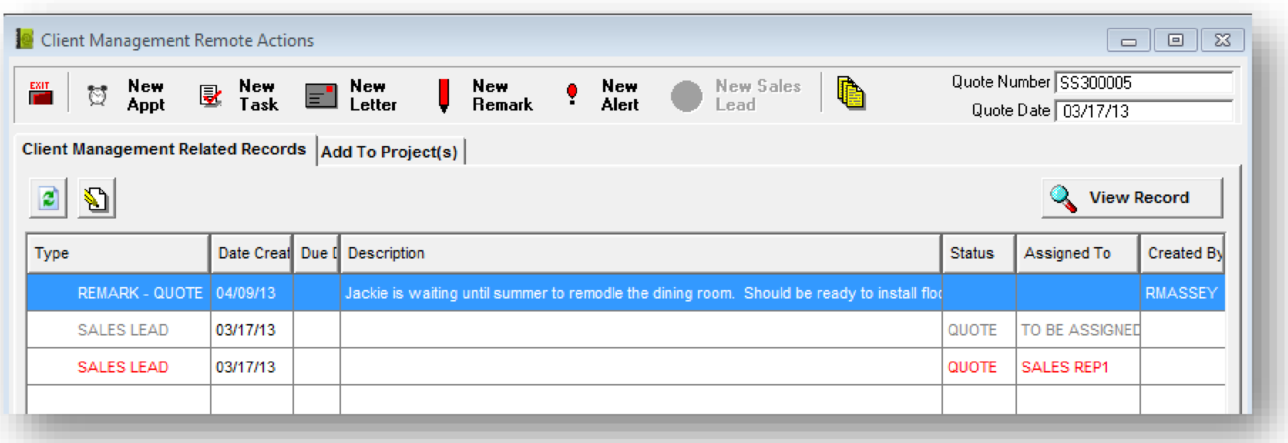
Accounts Receivable

This screen allows access to the Accounts Receivable information menu. Select the options desired to filter the customer information. This is a very efficient way to access an individual invoice for a particular receivable account.

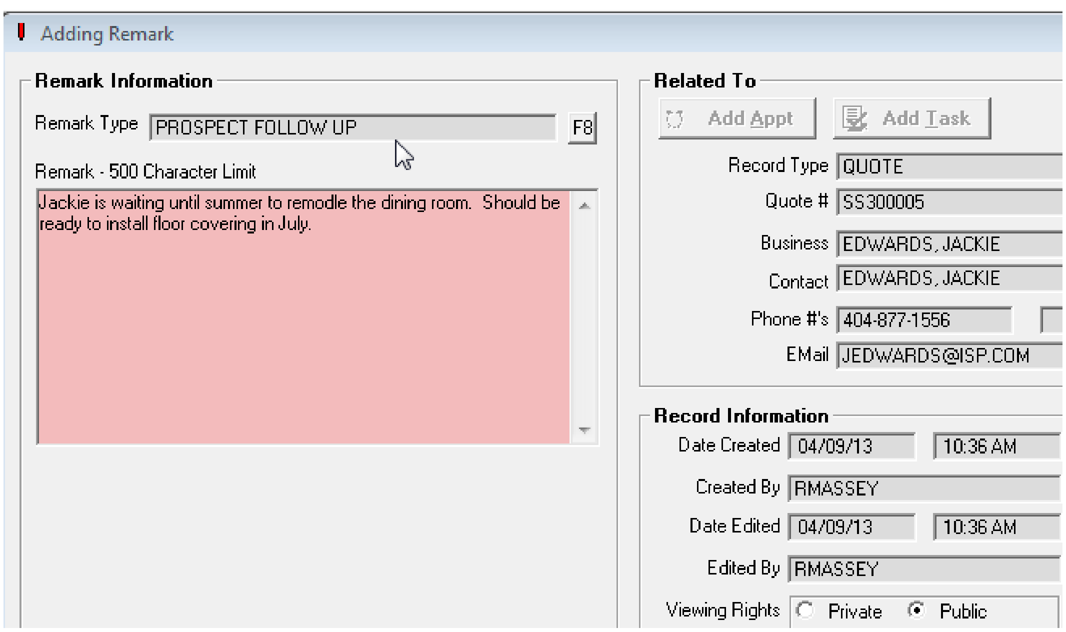


CMM Integration

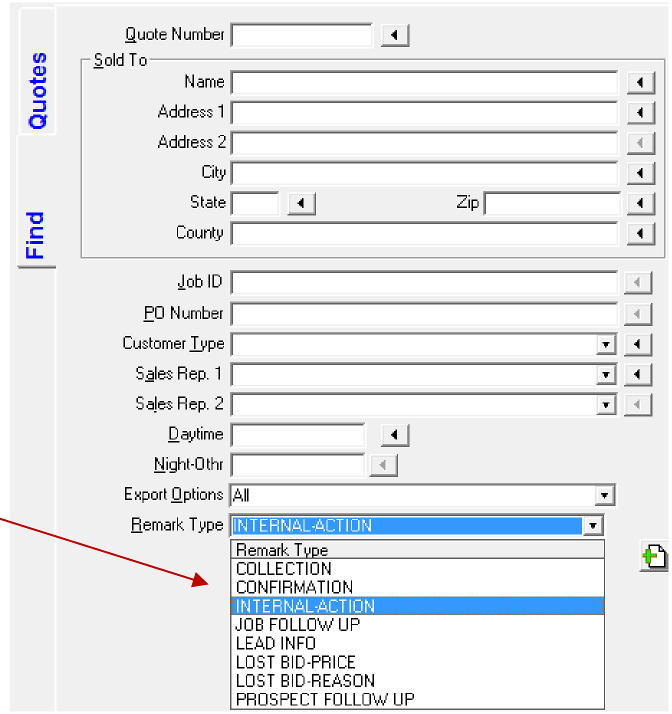
Clients with the Client Management module can add an alert, appointment, task, remark or letter for each order/customer in Order Entry. See Client Management for full instructions for this functionality



The Line highlighted above is a REMARK which any user can access in many places in RFMS to record information against a Customer or Record (Quote, Order etc). Think of them as permanent notes that can't be accidentally cleared.

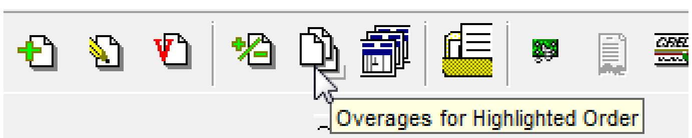


A remark requires a Remark Type which is available for searching on the Find or binoculars icon.

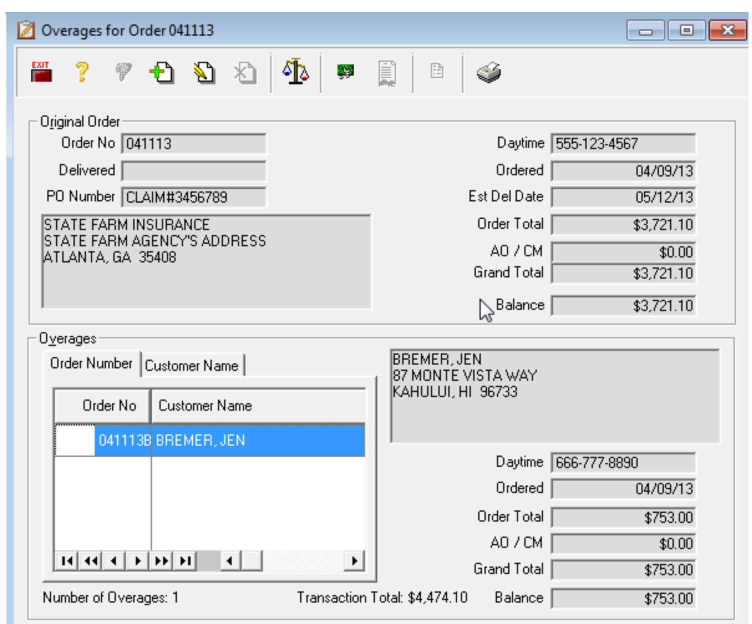


Overages

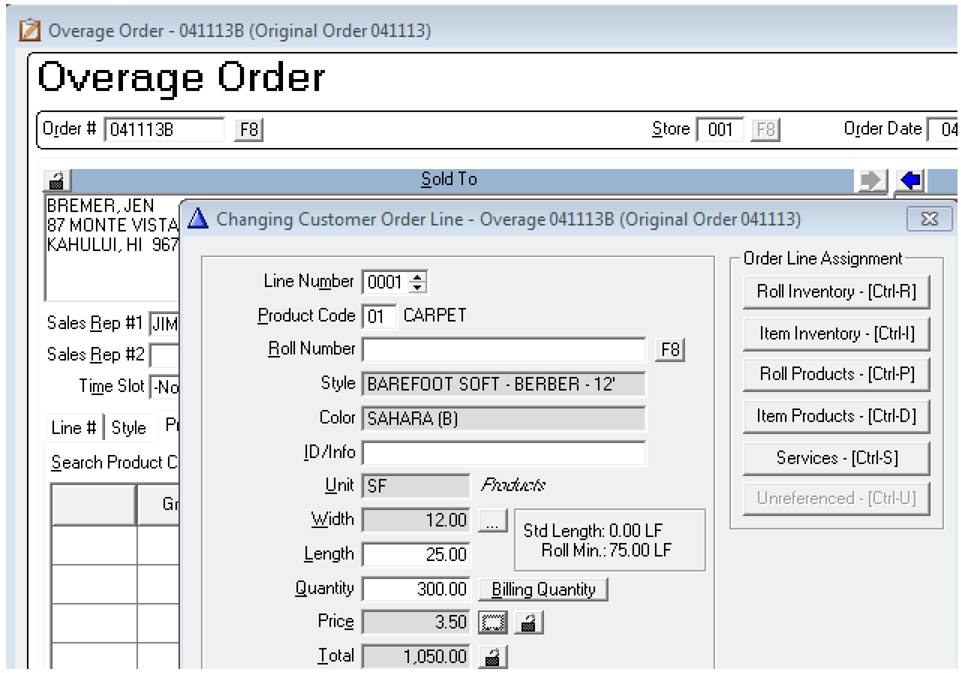
How to add an overage for a customer order:

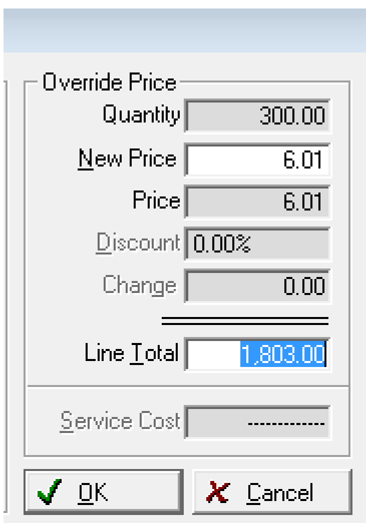


From Overage Screen click on ADD



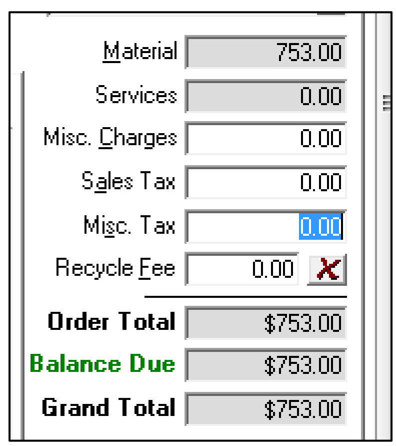
Open the lineup that has the total from the ORIGINAL line.





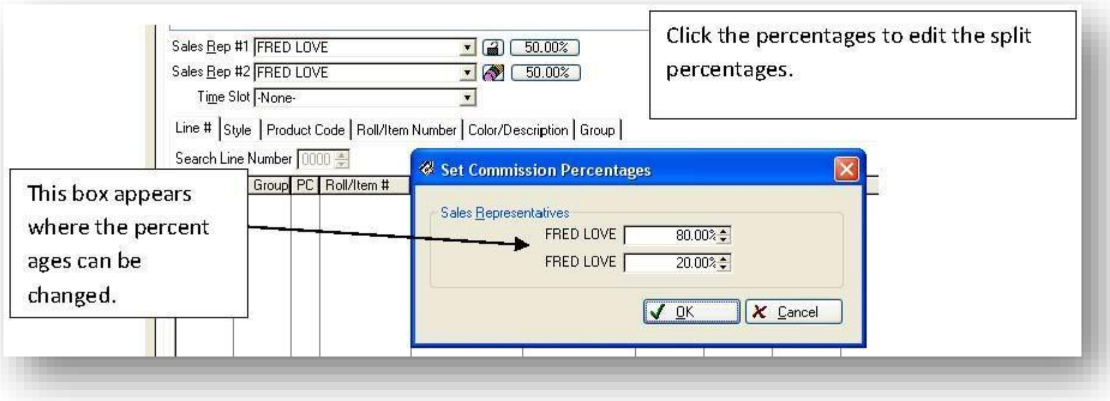
Fill in the TOTAL price including the original amount what will bill charge to the Overage client

The difference between what was on the ORIGINAL invoice



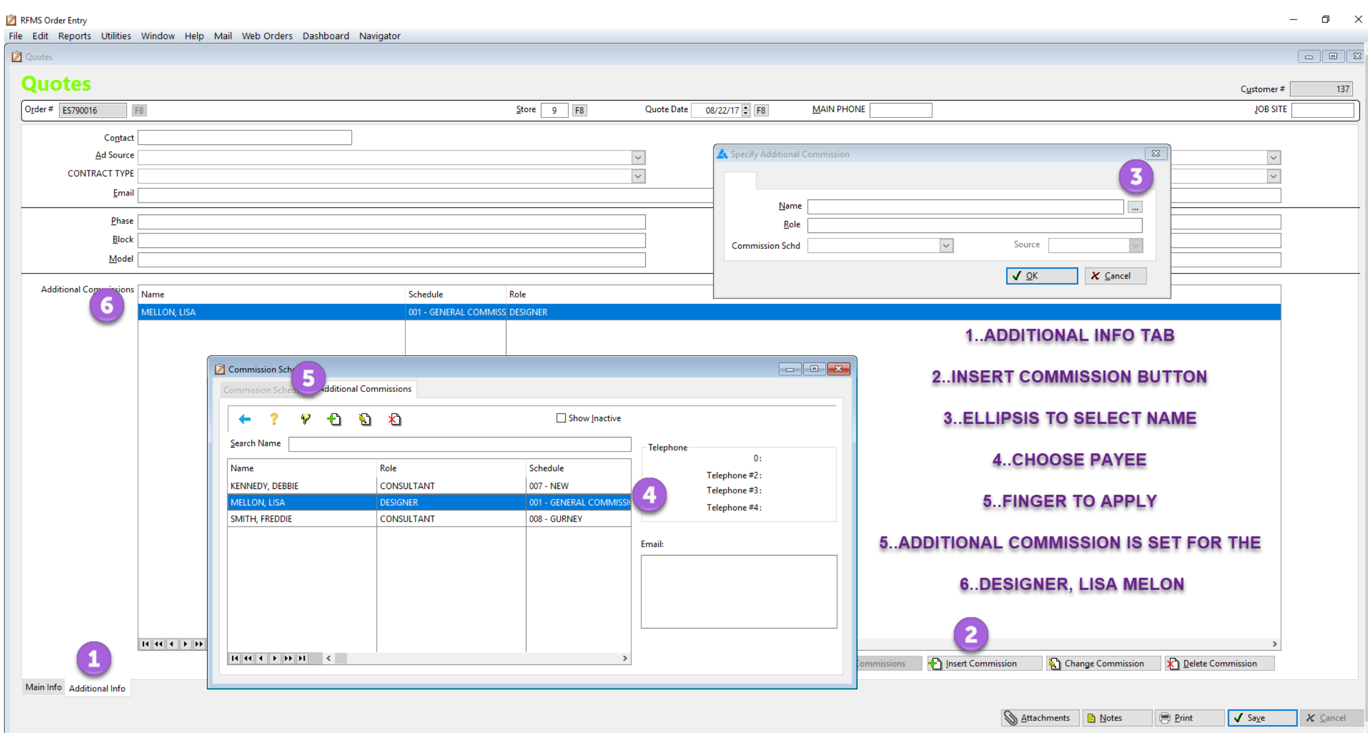
Split Commissions

There is a private parameter to allow users to view and edit the split percentages on orders and quotes Split commissions will affect sales reporting and commission reporting.



Additional Commissions

This feature allows you to pay extra or multiple commissions on any customer order. You may pay commissions to any customer, supplier or worker you have in your RFMS database. These commission amounts are paid in addition to commissions paid to the sales representatives. By attaching the appropriate customer, supplier or worker to the customer order and selecting the desired Commission Schedule, commissions are paid to that individual upon job cost.



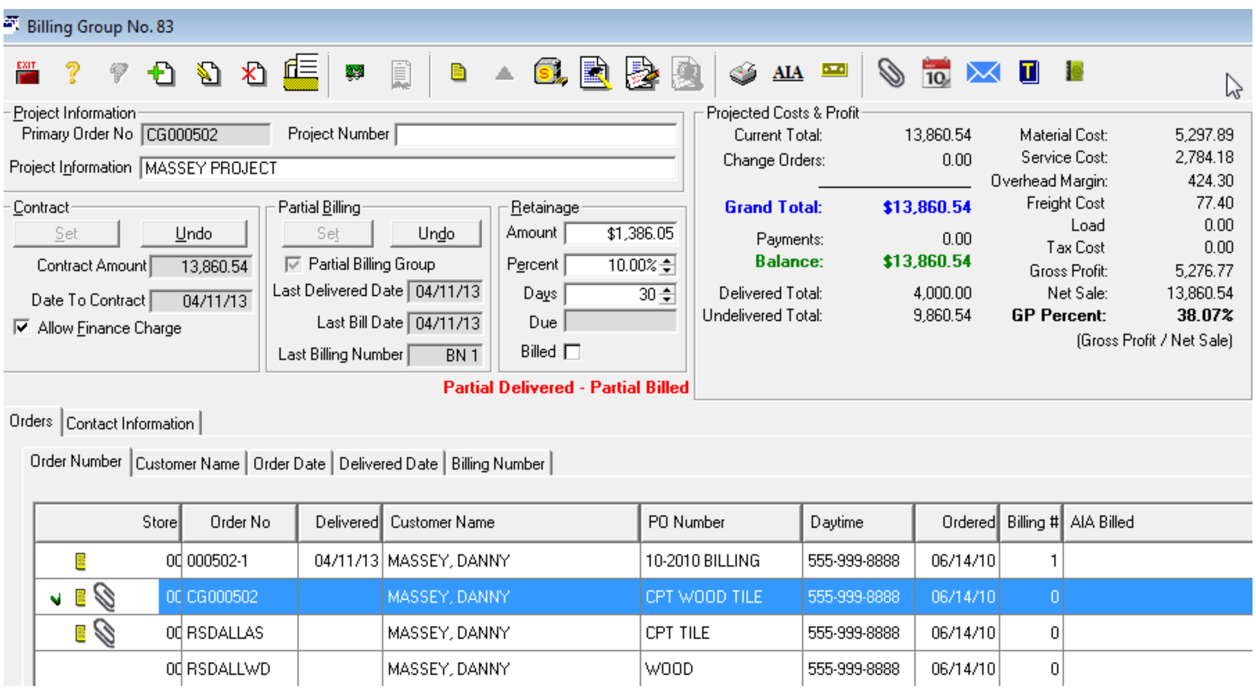
Billing Groups

New or existing customer orders can be linked together by Billing Groups. To create or a new billing group or link orders together while highlighted on the new order or existing order and click the Invoice Billing Group icon. Fill in all the appropriate information (i.e. Billing Group Name, Finance Charge info, Retainage info.), then click Exit to save the new information

Billing Groups and Partial Billing

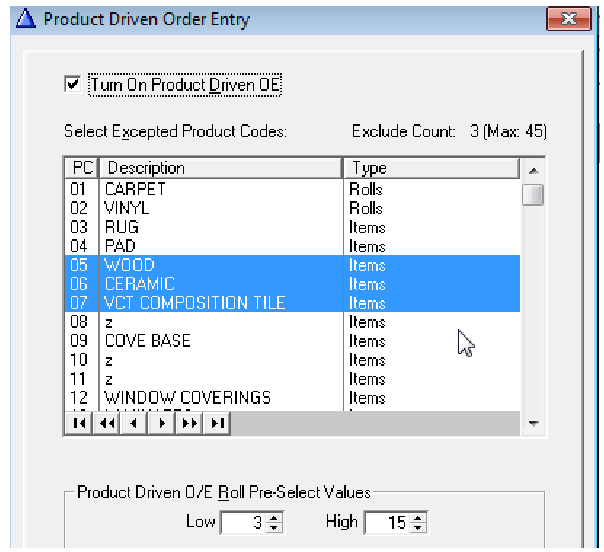
Partial Billing of customer orders is accomplished by using Billing Groups. The overall concept works like this

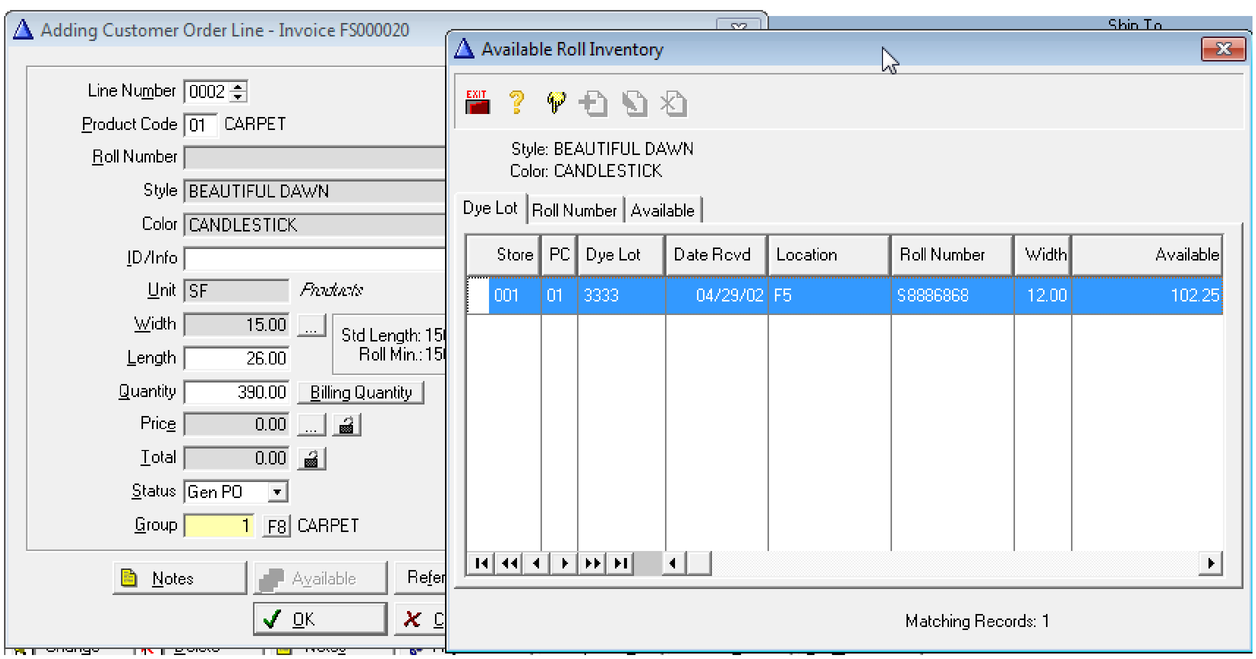
(1) An order is entered for the entire job,
(2) Material lines are split and exported to a new order(s)
(3) A billing group is created that includes the original order and all new orders
(4) Those new order(s) are job costed as they are completed
(5) A billing notice is produced
(6) The original is final billed when the entire job is completed.



Product Driven Order Entry

Product Driven Order Entry is a process that allows you to select products ONLY from the Product records when entering a new line. This feature is designed to allow you to optimize the usage of current inventory as well as reduce waste. Before beginning to use Order Entry in the Product Driven mode you must do the following: Activate the Public Parameter "Product Driven Order Entry" located in Parameters, Public Parameters, Product Drive OE. There may be certain products you wish to select directly from inventory. Highlight these products as exclusions. Set the appropriate information in the field called "Product Driven Order Entry Roll Pre-Select Values". This parameter will set a guideline for the system when choosing the appropriate roll inventory. This parameter requires a high value and a low value.





Batch Processing

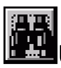
*Order Entry>File>Batch Processing or **F12***

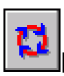
Batch processing of picking tickets, picking sheets work orders (Including Custom Work orders) and cutting lines is now available.

The batch processing screens are similar to the customer orders browse screens. Orders are listed when picking tickets or work orders is selected and lines are listed when Cut lines is selected.

Tool bar

No editing is available from the tool bar.

Use to find a specific range of records or a specific record. Alternately click the Find Tab on the left hand side. This find works the same as the ones for Customer Orders and Quotes. The list stays when switching between processes until the batch processing screen is closed.

Reset the browse list to include all records.

View highlighted order or line

View lines on highlighted order.

View notes on highlighted order or line

Once records are tagged, use this button to start processing.

Cut Lines

Lines cut, (staged or delivered in ERRM) already will not be listed.

- Use the find option to decide which lines to display.
- Choose to include rolls, items and services.
- If ready to cut only is chosen only lines ready to cut will display.

If not chosen, Inventory Lines in “None”, “Gen PO”, “On Order” or “Reserved” Status will be displayed and the status will show in pink. These Lines cannot be tagged for processing. The intent here is alert the user that there are Lines in the target filter that are not ready in the event that these Lines were overlooked for ordering.

Picking Tickets and/or Picking Sheets

Orders available for processing are ones which are:

- Not delivered
- Either an Original order or a Claim
- Have order lines in a cut status.

Use the find option to decide which lines to process and format of Report

- If Include Rolls, Items and Services are all checked, the Picking Sheet only shows Roll and Item Inventory, but will post Rolls, Items and Services.
- If the user decides to only check Include Rolls, for a Roll Report, then only Order Lines with Rolls will be posted. Then for a second report only checks Include Items, then only Order Lines with Items will be posted. Services would be skipped entirely.
- Picking Tickets act the same always. So, if only Include Rolls is checked, but "Picking Tickets – Stage Orders" is used, only those Orders that have Roll Inventory to process will be selected, but all eligible Lines on the Order will be processed.

Work Orders

- Not delivered
- Either an Original order or a Claim
- **Cut**

Tagging Options

Records are selected to be processed by tagging.

- Left click on a record or highlight a record and click the tag/untag button or Right Click and then click tag/untag. Using tag all is usually done after using the find feature to narrow the list.
- Once records are selected by tagging, clicking **the Printer Button process batches.**

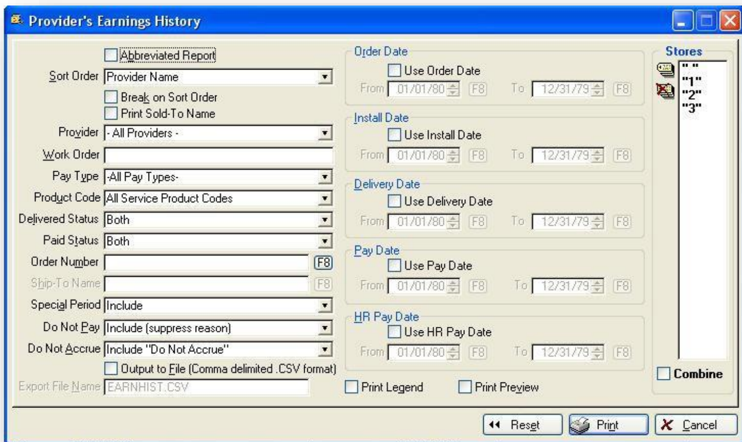
Processing order is important!

Once a Line is Delivered / Staged, it cannot be picked up again unless the user sets the Line back to cut, so do not choose one of the selections to deliver lines if you want to run another picking document.

Order Entry Reporting

Providers History Reports

The Provider Earnings History report can be used to generate a report identifying labor paid in advance for jobs in progress and not yet job costed.



Certified Payroll

This feature allows you to keep an audit trail of certified rates placed on certain jobs from a government level. For certain governmental jobs a specific minimum rate is set. This helps to ensure that providers are being paid that rate by providing a comparison between the actual and certified amounts.

Price Change Report

This selection prints a report of all selling prices that were changed on a customer order using an authorization code within the specified time frame.

Soft Reserves Report

This prints a report of all soft reserves entered against inventory. Print this report periodically to be sure you don't have soft reserves that are expired.

Batch Print

This feature will allow you to post Invoices, Claims, Job Cost Sheets, Picking Tickets, Quotes and Work Orders to a "batch file" for printing. This "batch file" saves all stored documents until you are ready to print them. When printing any of the above mentioned documents, you will see an option labeled "Post to Batch". Simply select this option and click the Print button.

The "Post to Batch" option will be available on each of the above mentioned documents' Confirm Print screen.

Orders/Quotes Profit Report (from Sales Reports)

This report is useful to spot check quotes or orders to see abnormal profit percent or zero cost lines. This report is similar to the Quotes report in Order Entry, but not identical. For Quotes and Undelivered Orders the Gross Profit % default same as in OE. The default Overhead % is inherited from the Standard Overhead Margin, but you can edit it here.

My Commissions

This option was added in version 11.2 to the Order Entry Reports for a sales rep to print their preliminary commission report. It uses the same report routine as the preliminary commissions report from accounting, but is limited to the sales rep which is printing it.

For this report to be available the system must be set to in *>Utilities>System Options>System Wide>General> Password on entry only* must be set to yes

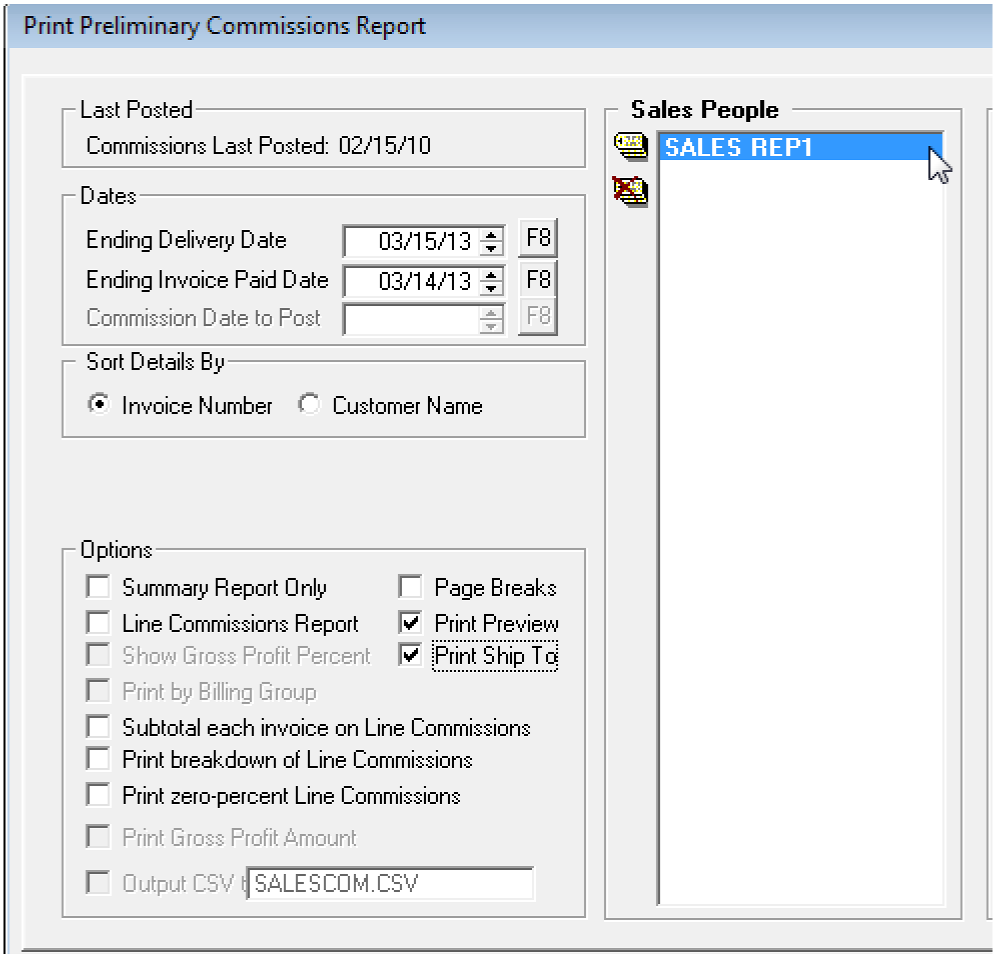
Then the sales rep must have an associated password. Go to *Utilities>Maintain Passwords>Add or Edit a Password>*Select a user name.

Enterprise Manager Users

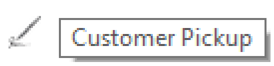
Make sure the User Name is associated with the correct Sales Person (RFMS Name).
Go to Enterprise Manager>File>User/Group/Role Management>Insert or Edit

Report Options

The report menu option will then be visible when that password is entered on entry to the system.



Customer Pickup



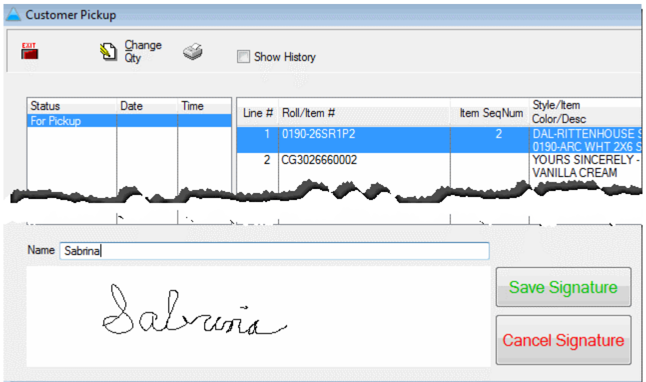
UTILITIES / SYSTEM OPTIONS / ADMIN SYSTEM OPTIONS

"use customer pickup" in the Search Option Field for Text

This feature is designed to have a client sign an electronic document and save and display that signature in Order Entry. It is compatible with the Topaz System signature pads commonly available at your office supply store. The Topaz software does have to be installed on any workstation needing to see the signature.

However, a paper document can be generated and signed without the signature pad. Simply print the picking ticket and with the order still highlighted select the Customer Pickup icon and print.

For details see “Customer Pickup” on the RFMS Help Desk



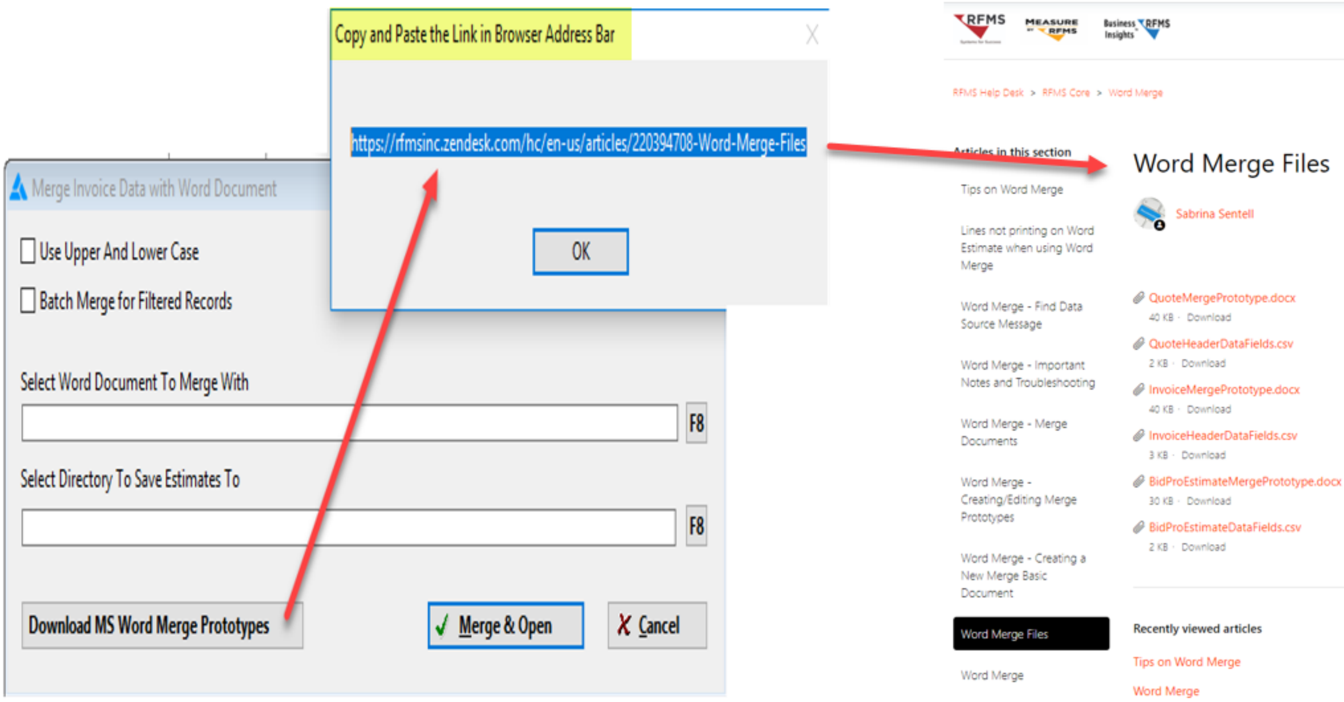
Word Merge

This feature exports the data from the selected records in Customer Orders, Quotes, or BidPro and creates a Microsoft Word Merge document for the Invoices, Quotes, or Estimates.

By doing this, it allows RFMS users to customize these documents by

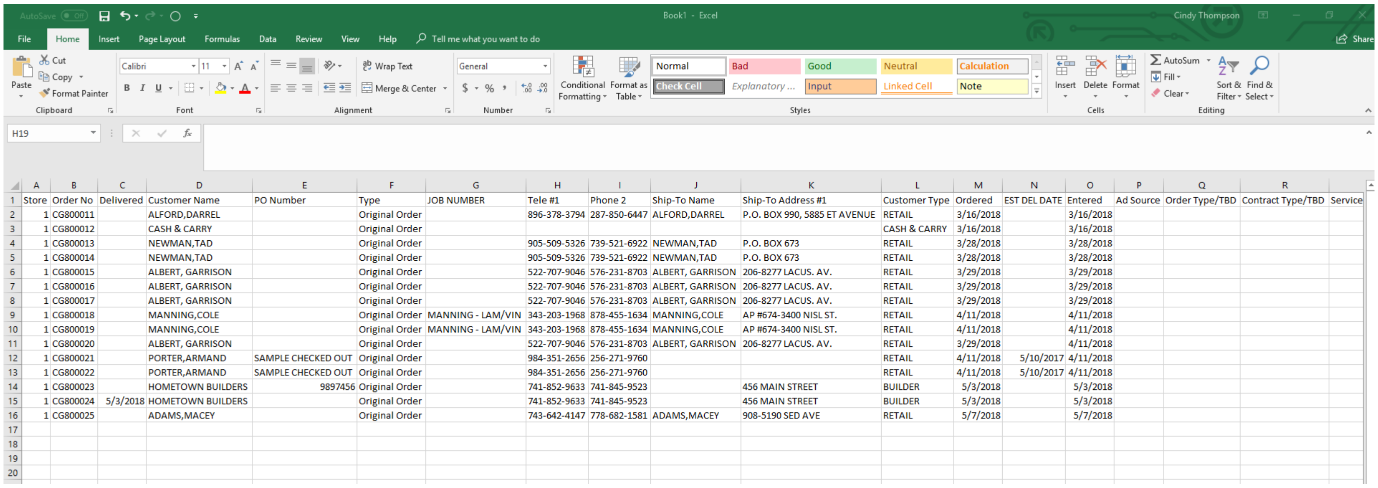
- Adding fields
- Deleting Fields
- Changing Font Style, Size and Color
- Changing the Placement of fields
- Inserting Additional Text
- Adding Supplemental Pages.

To use this feature, a user must have Word 2007 or later on the workstation they are working on at the time. Also, an understanding of how to use Microsoft Word is required. RFMS will not offer support or training once the template and document are in Microsoft Word.



Copy Browse Screen

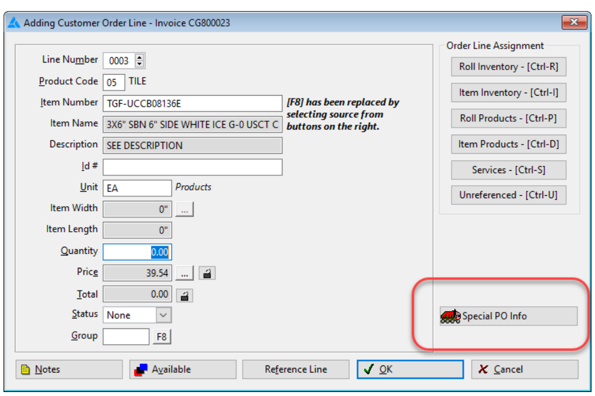
With this key combination, any open browse screen can be copied, including any part that cannot be seen, and pasted into an Excel Spread Sheet.

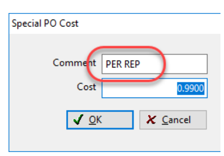


Special PO Info

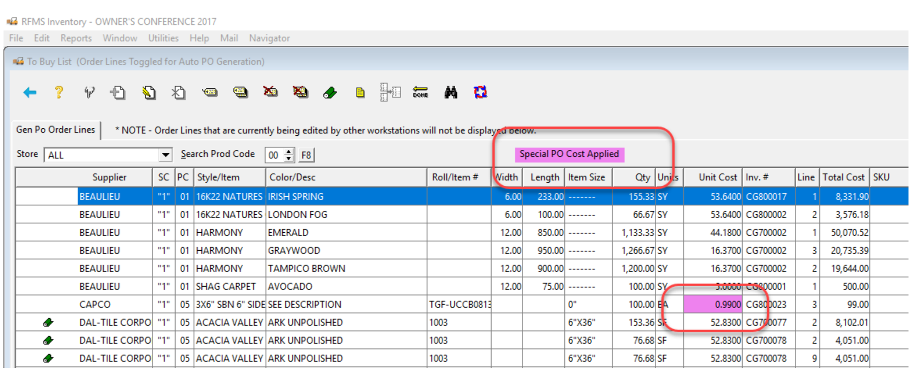
UTILITIES / SYSTEM OPTIONS / ADMIN SYSTEM OPTIONS / “special cost” in the Search Option Field for Text

If this option is set to Yes, then a Special PO Info box will appear on the right lower side of the Order Line screen when the roll/item is pulled from Products. The user will select that box to enter a special cost received. Then, that cost will be indicated in the AutoPO screen in Inventory letting the order desk know that this is a special cost received.



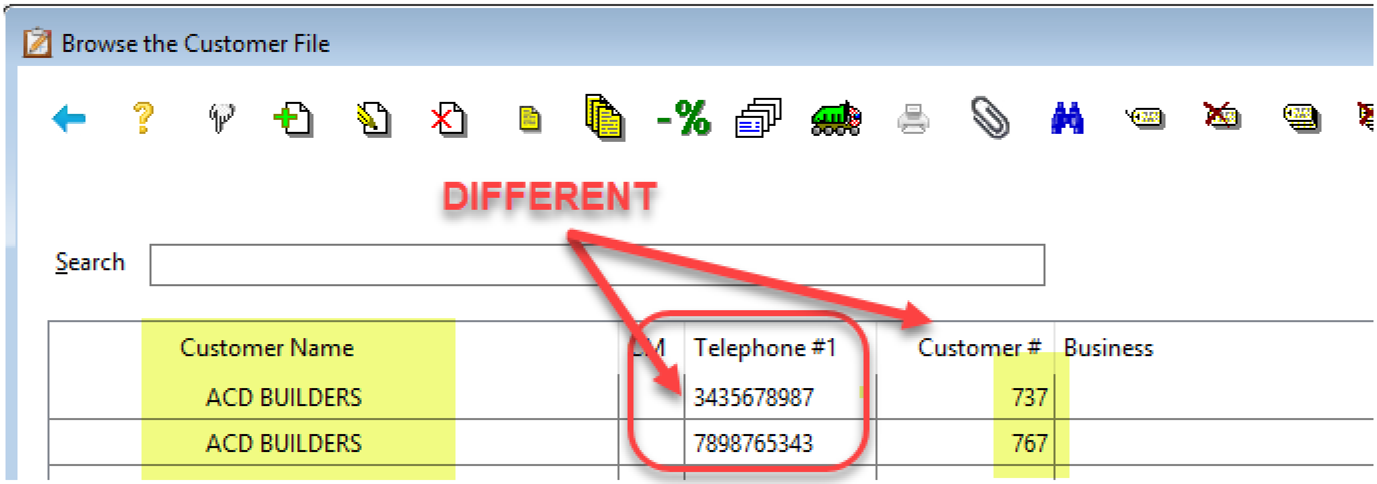


When the comment, special cost, quantity is entered and Status is changed to “GENPO” then in Inventory the “Special PO Cost Applied” will be indicated for the purchaser.



Customers with the Same Name

RFMS now allows customers with the same names to be entered. RFMS looks at the Customers Name and Telephone 1 field to see if it is a duplicate customer. If those two fields are the same as one already entered, then it will not be allowed to duplicate.



Batch Printing

This feature allows batch printing Claims, Invoices, Job Cost Sheets, Picking Tickets, Quotes and Work Orders. Visit the following site and download a program called PDF995 in order to use this feature.

http://www.pdf995.com/

Do not download the sponsored version. The purchase of the full version (PDFSuite) is recommended. This will avoid any popup windows during use.

How this feature works

This feature will allow posting Invoices, Claims, Job Cost Sheets, Picking Tickets, Quotes and Work Orders to a batch file for printing. This batch file saves all stored documents until you are ready to print them. When printing any of the above-mentioned documents, you will see an option labeled Post to Batch. Simply select this option and click the Print button.

The Post to Batch option will be available on each of the above-mentioned documents-Confirm Print screen.

When you click Post to Batch, a pdf file is created in a subdirectory where your RFMS files are located. The last batch for the workstation for any batch type (Invoice, Quotes, etc.) will remain on the disk until the next time that workstation does another batch printout for that batch type. For example, you have a batch named Invoice1.pdf. In the event that the batch fails to print, it is simple to use Adobe Reader to load this batch and print selected pages.

How to retrieve documents posted to batch files

1. Click Reports and select Batch Print. A drop-down list of document types will display.
2. Select the appropriate document by single clicking.

3. Choose the sort order by single clicking on the field names in the verbose column.
4. Notice that the Rank number denotes the order of your sort.
5. When you have selected the appropriate sort order for this particular document batch, click the print button.
6. The documents will be combined into one .pdf file that will display after you do step 5.

RFMS Smart Search

This link will give a list of the fields that RFMS Smart Search looks at in each module.

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

This article is a good one to “follow” for new tips as they are added.

https://rfmsinc.zendesk.com/hc/en-us/articles/218333637-RFMS-Smart-Search-Tips