



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

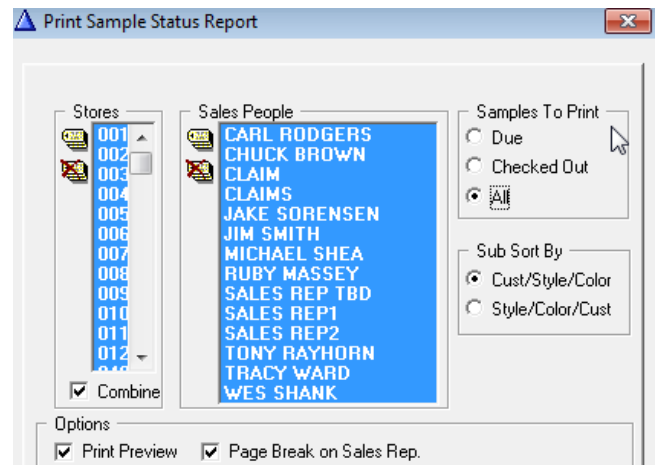
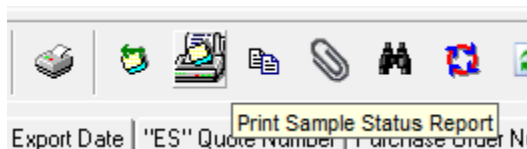
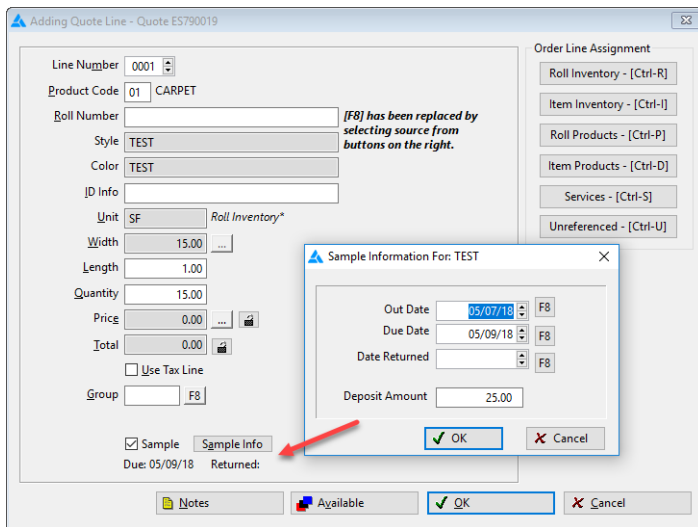
- SAMPLE CHECKOUT
- BUNDLES & TEMPLATES
- SPLITTING & COMBINING LINES
- LINE GROUPING
- ADDITIONAL INFORMATION
- LOCKING FIELDS
- PRINT OPTIONS
- ORDER TRACKING & PDF HISTORY
- BASELINE
- ACCOUNTS RECEIVABLE
- CMM INTEGRATION
- OVERAGES
- ADDITIONAL & SPLIT COMMISSIONS
- BILLING GROUPS
- PRODUCT DRIVEN 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.



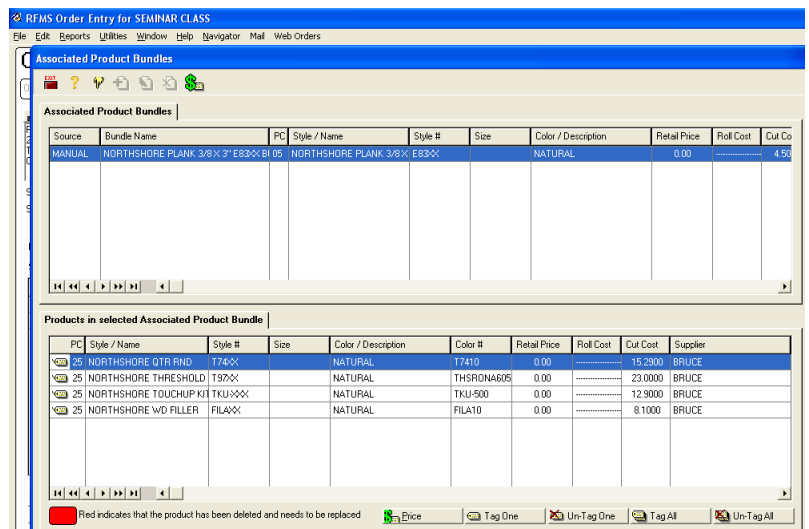
A report can be generated to see what samples have been checked out or what samples or due or both. Select parameters to include stores and salespeople desired, how to sort it and to run a page for each salesperson individually

Page No: 1 05/07/18 04:43PM	SEMINAR CLASS SAMPLE STATUS REPORT Due Sub Sort By: Customer/Style/Color *** denotes that sample is due					
Store: Combine						
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						

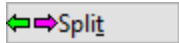
Using Bundles and Templates



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.

The dialog box titled "Split Customer Order Line" contains the following information:

Line #: 0007	Status: None
Product Code: 04	Width: 0.00
Item Number: 1/2 MAGIC 6	Length: 0.00
Name: 1/2 REBOND PAD	Quantity: 1,200.00
Description: 6# DENSITY	
Unit: SF	Line Total: 696.00

Below the table, there are two input fields:

Length:

Quantity:

At the bottom right, there are two buttons: "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).

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.

Number	Group	Product Code	Roll/Item #	Style/Item	Color/Description
1001	1	01-CARPET	*UnRef*	BAREFOOT SOFT - BERBER - 12'	SAHARA (B)
1002		01-CARPET	*UnRef*	ACCOMMODATION	MARBLESTONE
1003	1	81-CARPET INSTALLATION	*UnRef*	CARPET INSTALLATION - STANDARD/FURN	
1004		08-z	*UnRef*	METAL/CLAMPDOWN 1"PIN	HMF GOLD
1005		08-z	*UnRef*	METAL/CLAMPDOWN 1"PIN	HB SILVER
1007		04-PAD	*UnRef*	1/2 REBOND PAD	6# DENSITY
1008	1	04-PAD	*UnRef*	3/8 REBOND PAD	5# DENSITY
1009	1	81-CARPET INSTALLATION	*UnRef*	CARPET INSTALLATION - STANDARD/FURN	
1010		08-z	*UnRef*	METAL/CLAMPDOWN 1"PIN	HMF GOLD
1011		08-z	*UnRef*	METAL/CLAMPDOWN 1"PIN	HB SILVER
1012	1	04-PAD	*UnRef*	1/2 REBOND PAD	4# DENSITY
1013	1	04-PAD	*UnRef*	1/2 REBOND PAD	6# DENSITY
1014	1	04-PAD	*UnRef*	3/8 REBOND PAD	5# DENSITY
1015	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.

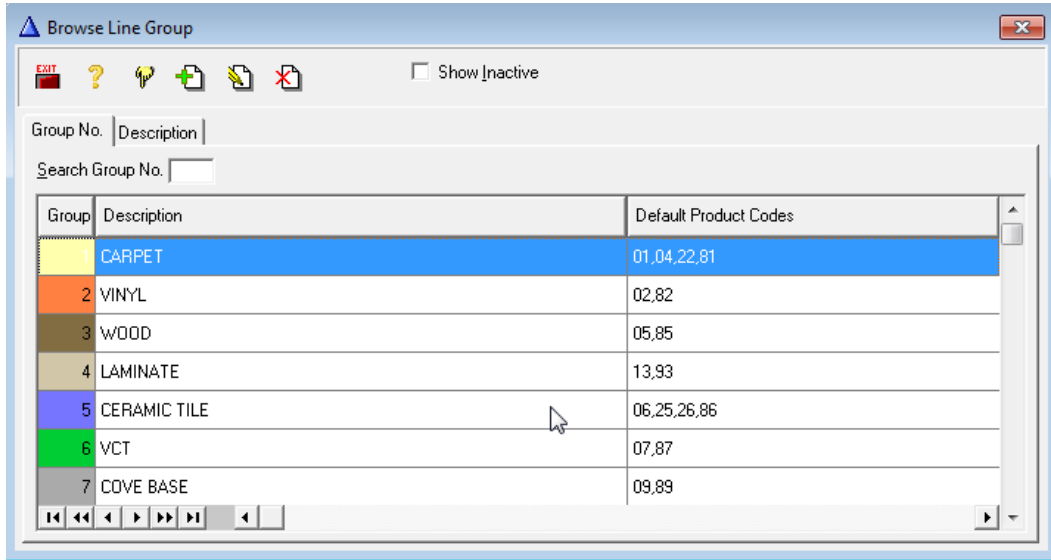
Changing Quote Line - Quote EXAMPLE

Line Number: 0006
 Product Code: 08
 Item Number: S-196 00196358 [F8]
 Item Name: WOOD ADHESIVE-EVER LAST PRE
 3.5 GALLON PAIL
 ID/Info: 175-210 SF/GAL
 Unit: PL
 Width: 0.00
 Length: 0.00
 Quantity: 0.00 [Billing Quantity]
 Price: 0.00
 Total: 0.00
 Group: [] [Sample Info]

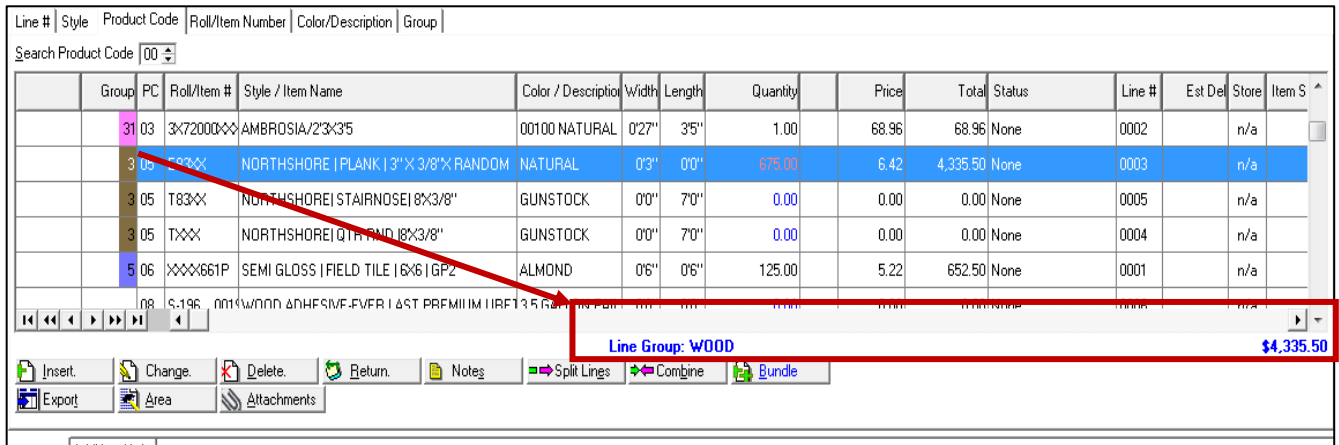
Roll Inventory - [Ctrl-R]
 Item Inventory - [Ctrl-I]
 Roll Products - [Ctrl-P]
 Item Products - [Ctrl-D]
 Services - [Ctrl-S]
 Unreferenced - [Ctrl-U]

Overhead Margin: 0.05%

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.

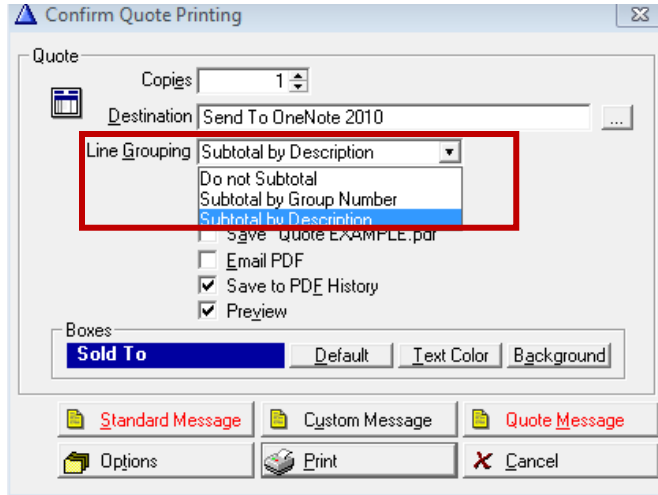


Also, note that below the browse, it shows the Line Group Description as well as the total of Lines for the highlighted group. Highlight a record and the Line Group Total will be displayed at the bottom of the line browse screen.



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

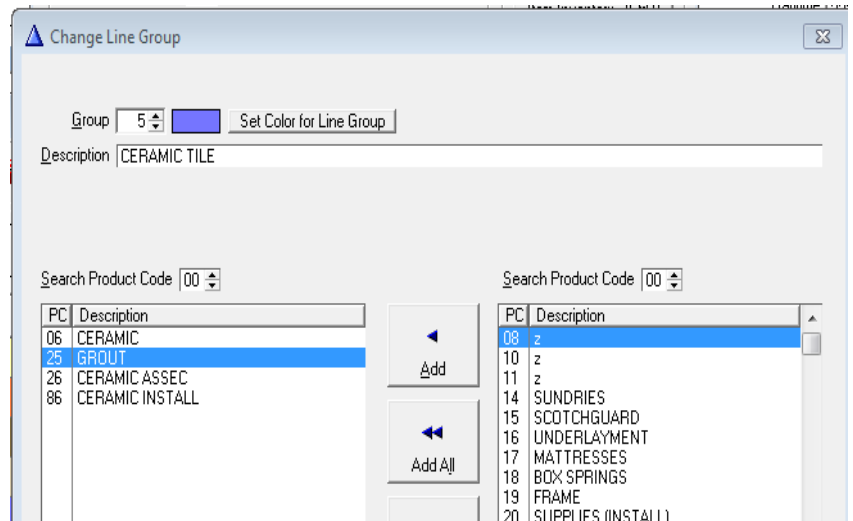
555-123-4567

Area	Inventory	Style/Item	Color/Description	Quantity Units	Price	Extension
#1 - CARPET						
	147423	128 GRAPHIC LOOP	TEAL/MAUVE	900.00 SF	9.00	8,100.00
		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

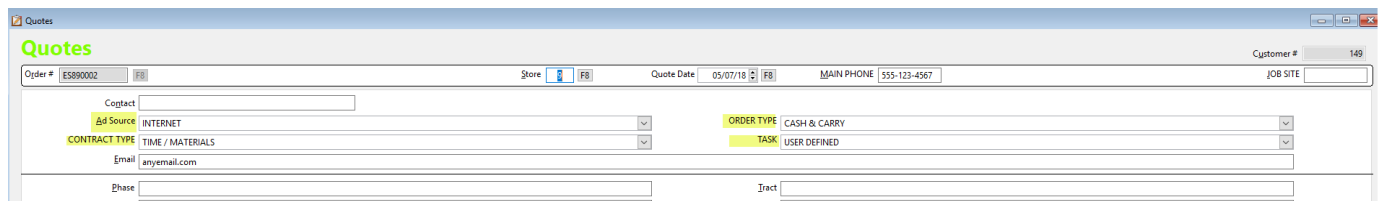
From the Group F8 click on the ADD button to generate a new Group Description and color.

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

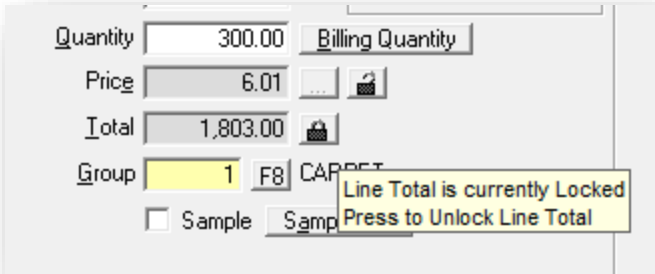
These fields allow users to specify more information on each order and allow you to run reports based on that information. These fields are user defined by their drop down choices. Titles of all except ad source can be changed from the Public Parameters. The choices are built from the File menu. Reports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



Locking Fields

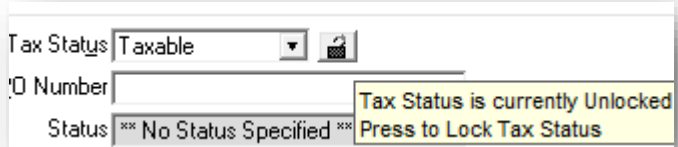
Sold to, Sales Reps, Tax Status and Line Total/Unit Price can all be locked by using the padlock icon. It is recommended that a password be set to unlock the padlock button. Locking the field prevents it from being changed either directly or by changing another aspect of the record.

Quote or Order LINE



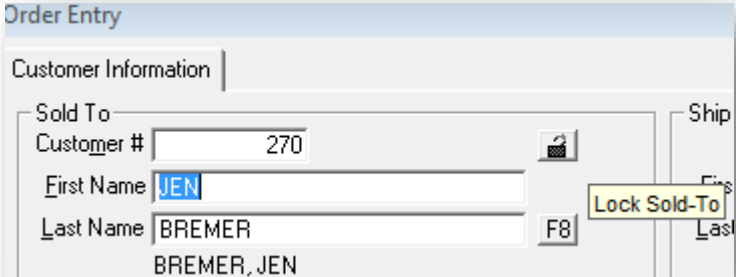
Quantity 300.00 Billing Quantity
Price 6.01
Total 1,803.00
Group 1 F8 CAPSET
Sample
Line Total is currently Locked
Press to Unlock Line Total

Tax Status on Quote or Order



Tax Status Taxable
PO Number
Status *** No Status Specified ***
Tax Status is currently Unlocked
Press to Lock Tax Status

Sold To Section of Quote or Order

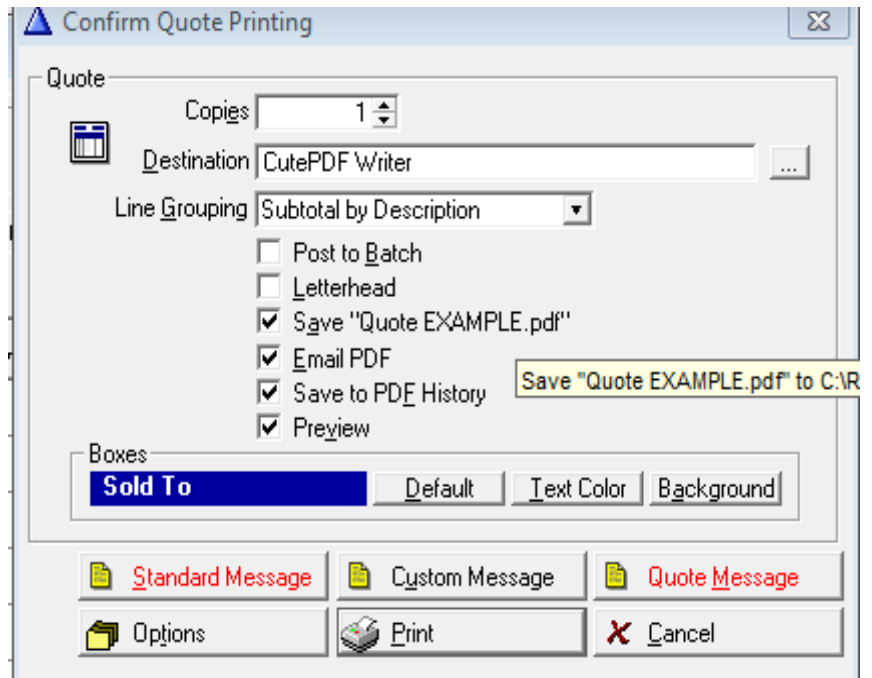


Order Entry
Customer Information
Sold To
Customer # 270
First Name JEN
Last Name BREMER
BREMER, JEN
Ship
Lock Sold-To

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



Date Created	Time Created	Created By User	Created By Machine	Description
04/09/13	11:19 AM	RMASSEY	RUBY-LAPTOP	Quote

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.



Date	Time	User Name	Type	Action Description	D	S	Source Name	D	D	Destination Name
03/17/13	9:33 AM	RMASSEY	NEW	CREATE NEW RECORD FROM SAL	RF SA	LEAD'S LAST NAM	RF PF			031713
03/17/13	2:55 PM	RMASSEY	NEW	CREATE NEW RECORD FROM SAL	RF SA	LEAD'S LAST NAM	RF RE			031713A
03/17/13	2:59 PM	RMASSEY	NEW	EXPORT QUOTE TO NEW ORDER	RF RE	031713A		RF OF		FS000016
03/17/13	2:59 PM	RMASSEY	RELATE	RELATE SALES LEAD TO ORDER	RF SA	LEAD'S LAST NAM	RF OF			FS000016
03/17/13	3:50 PM	RMASSEY	NEW	CREATE NEW RECORD FROM SAL	RF SA	LEAD'S LAST NAM	RF BI			031713BI-1
03/17/13	3:50 PM	RMASSEY	NEW	CREATE NEW RECORD FROM SAL	RF SA	LEAD'S LAST NAM	RF BI			031713BI-2

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									
	Baseline Qty	Actual Qty	Baseline Cost	Actual Cost	Baseline Sell	Actual Sell	Baseline GP	Actual GP	Variance GP
Style/Item Comparison									
50.000% BILLING	0.00	-2.00	0.00	-3,400.00	0.00	-4,000.00	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	0.00	0.00
ADHESIVE	0.00	0.00	0.00	0.00	0.00	0.00	-100.00	0.00	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	1,000.00	1,000.00	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	1,000.00	1,000.00	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	0.00	0.00
MEASURE FEE	0.00	0.00	0.00	0.00	0.00	0.00	-100.00	-100.00	0.00
METAL	0.00	0.00	0.00	0.00	0.00	0.00	100.00	0.00	0.00

Baseline VS Progress						Order Number: 081710	
						Baseline Created: 08/17/10	
	Baseline	Delivered	Undelivered	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 ^{Due}

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.

Customer A/R Information

Report Type

- 1. Billed Invoices With Balances
- 2. Un-Billed Invoices
- 3. Selection 1 and 2 Combined
- 4. All Account Activity
- 5. All Billed Invoices

Parameters

First Name: F8

Last Name: CAMBRIDGE HOMES-CARILLON C F8

CAMBRIDGE HOMES-CARILLON CLUB

Start Date: 01/01/80 F8

End Date: 12/31/79 F8

Print Add'l Info

Sub Sort

- Invoice #
- Bill Date
- Order Date

Customer: CAMBRIDGE HOMES-CARILLON CLUB et al / Activity: Del. w/Balance

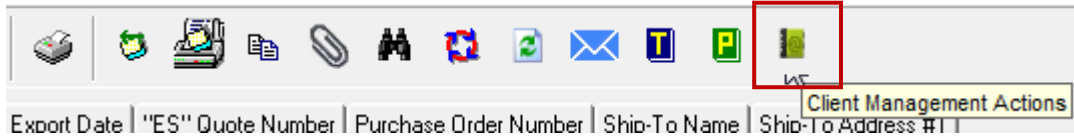
Customer	Invoice	Order Date	Bill Date	total Charges	total Credits	Balance	Days	Current	Over 31	Over 61
CAMBRIDGE HOMES-CARILLON	051211B	05/10/11	05/10/11	1,500.00	0.00	1,500.00	0	0.00	0.00	0.00
CAMBRIDGE HOMES-CARILLON	CG000527	11/19/10	11/19/10	1,531.00	0.00	1,531.00	0	0.00	0.00	0.00
CAMBRIDGE HOMES-CARILLON	CG000528	11/19/10	12/19/10	500.00	0.00	500.00	0	0.00	0.00	0.00
CAMBRIDGE HOMES-CARILLON	CG000529	11/19/10	01/19/11	562.00	0.00	562.00	0	0.00	0.00	0.00
				4,093.00	0.00	4,093.00	0	0.00	0.00	0.00

Navigation: [Home] [Back] [Forward] [End] [Print] [Exit]

Buttons: [Reset] [Go To] [View Order] [Lines] [Receipts] [Job Cost] [Exit]

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



Client Management Remote Actions

Quote Number: SS300005
Quote Date: 03/17/13

Client Management Related Records | Add To Project(s)

View Record

Type	Date Creat	Due	Description	Status	Assigned To	Created By
REMARK - QUOTE	04/09/13		Jackie is waiting until summer to remode the dining room. Should be ready to install flo			RMASSEY
SALES LEAD	03/17/13			QUOTE	TO BE ASSIGNED	
SALES LEAD	03/17/13			QUOTE	SALES REP1	

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.

Adding Remark

Remark Information

Remark Type: PROSPECT FOLLOW UP [F8]

Remark - 500 Character Limit

Jackie is waiting until summer to remode the dining room. Should be ready to install floor covering in July.

Related To

Add Appt | Add Task

Record Type: QUOTE

Quote #: SS300005

Business: EDWARDS, JACKIE

Contact: EDWARDS, JACKIE

Phone #'s: 404-877-1556

E-Mail: JEDWARDS@ISP.COM

Record Information

Date Created: 04/09/13 10:36 AM

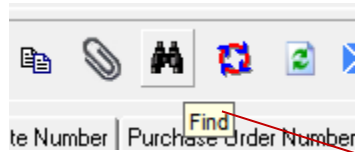
Created By: RMASSEY

Date Edited: 04/09/13 10:36 AM

Edited By: RMASSEY

Viewing Rights: Private Public

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



Quotes

Quote Number []

Find

Sold To

Name []

Address 1 []

Address 2 []

City []

State [] Zip []

County []

Job ID []

PO Number []

Customer Type []

Sales Rep. 1 []

Sales Rep. 2 []

Daytime []

Night-Othr []

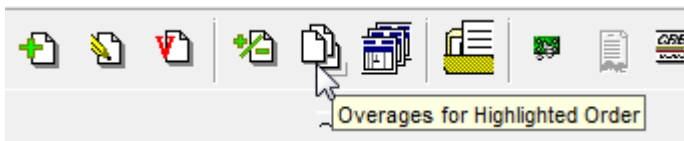
Export Options [All]

Remark Type [INTERNAL-ACTION]

- Remark Type
- COLLECTION
- CONFIRMATION
- INTERNAL-ACTION
- JOB FOLLOW UP
- LEAD INFO
- LOST BID-PRICE
- LOST BID-REASON
- PROSPECT FOLLOW UP

Overages

How to add an overage for a customer order:



From Overage Screen click on ADD

Overages for Order 041113

Original Order

Order No | 041113

Delivered []

PO Number | CLAIM#3456789

STATE FARM INSURANCE
STATE FARM AGENCY'S ADDRESS
ATLANTA, GA 35408

Daytime | 555-123-4567

Ordered | 04/09/13

Est Del Date | 05/12/13

Order Total | \$3,721.10

AD / CM | \$0.00

Grand Total | \$3,721.10

Balance | \$3,721.10

Overages

Order No	Customer Name
041113B	BREMER, JEN

BREMER, JEN
87 MONTE VISTA WAY
KAHULUI, HI 96733

Daytime | 666-777-8890

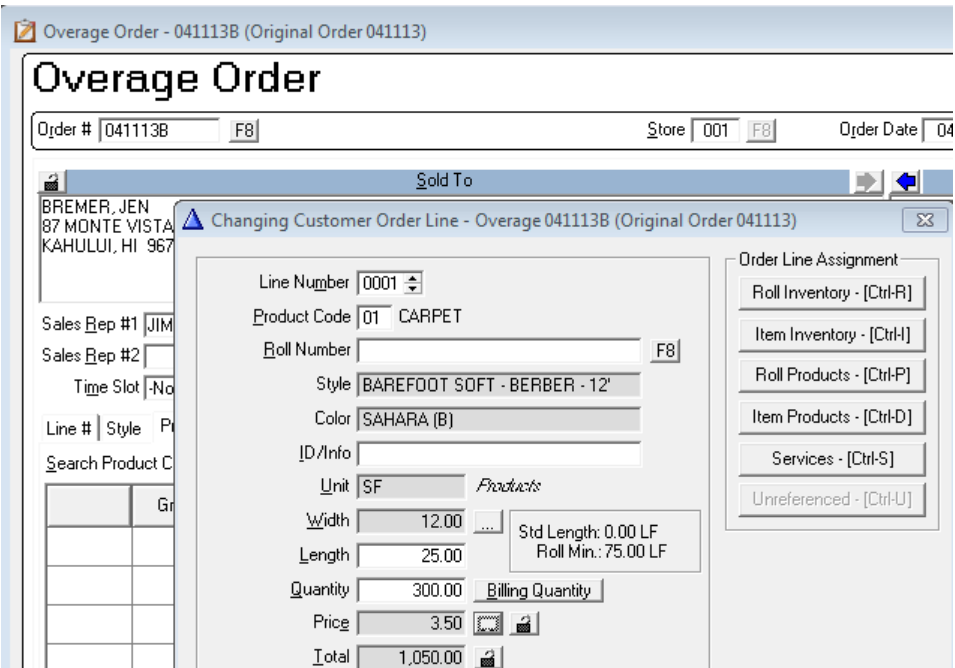
Ordered | 04/09/13

Order Total | \$753.00

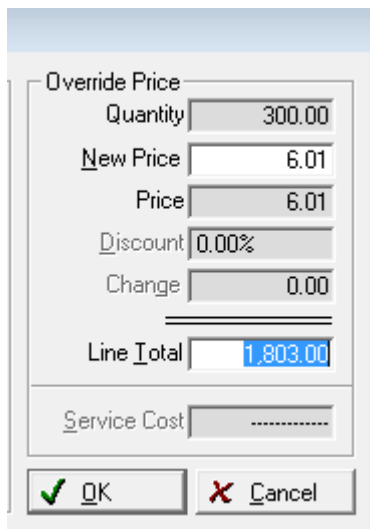
AD / CM | \$0.00

Grand Total | \$753.00

Number of Overages: 1 Transaction Total: \$4,474.10 Balance | \$753.00



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



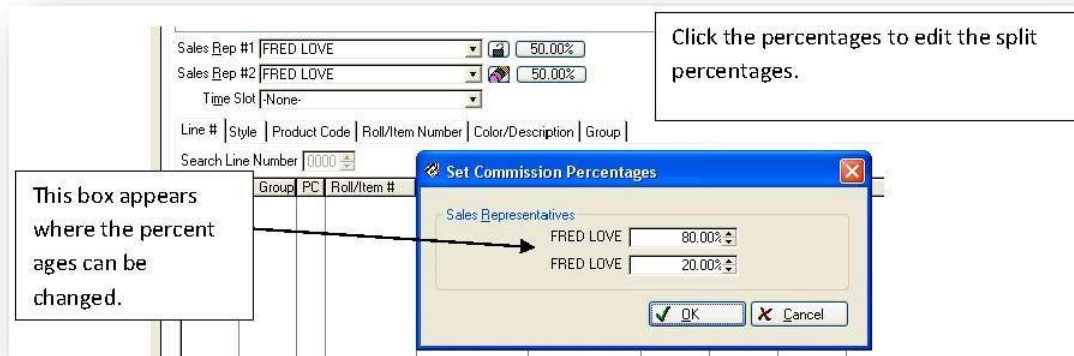
Fill in the TOTAL price including the original amount what will bill charge to the Overage client

The difference between what was on the ORIGINAL invoice

Material	753.00
Services	0.00
Misc. Charges	0.00
Sales Tax	0.00
Misc. Tax	0.00
Recycle Fee	0.00
Order Total	\$753.00
Balance Due	\$753.00
Grand Total	\$753.00

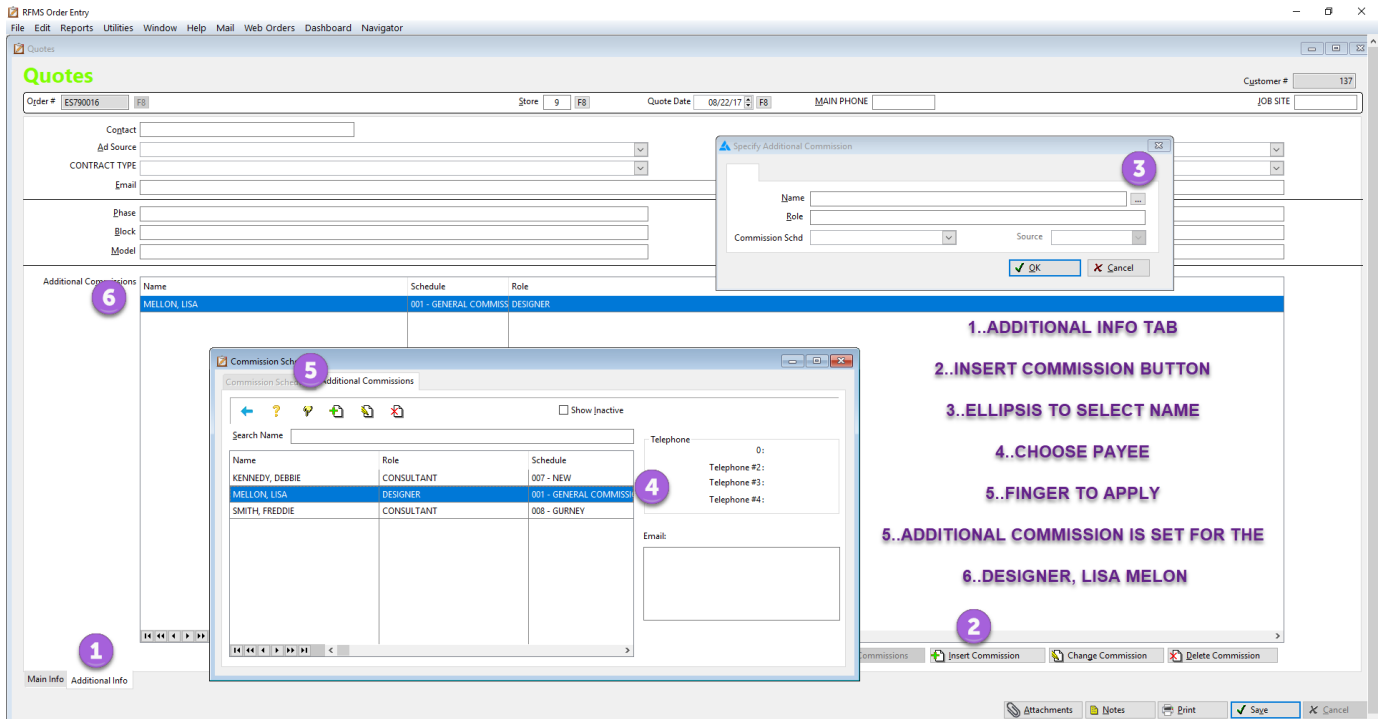
Split Commissions

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.

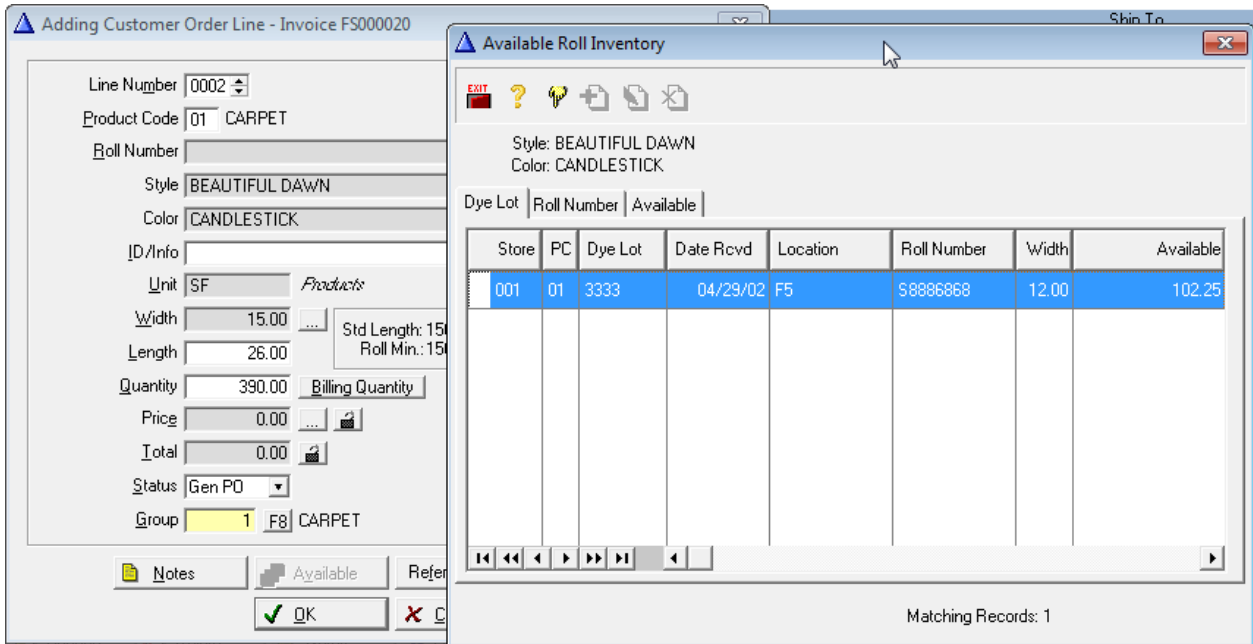
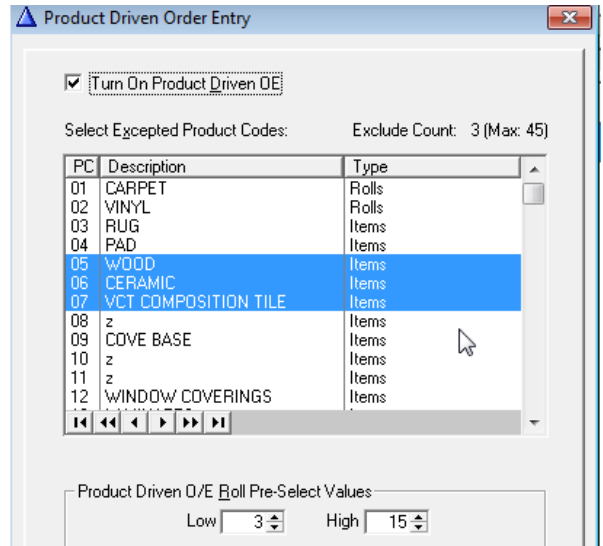
Partial Delivered - Partial Billed

Order Number	Customer Name	Order Date	Delivered Date	Billing Number
00 000502-1	MASSEY, DANNY	04/11/13		
00 CG000502	MASSEY, DANNY			
00 RSDALLAS	MASSEY, DANNY			
00 RSDALLWD	MASSEY, DANNY			

Store	Order No	Delivered	Customer Name	PO Number	Daytime	Ordered	Billing #	AIA Billed
	00 000502-1	04/11/13	MASSEY, DANNY	10-2010 BILLING	555-999-8888	06/14/10	1	
	00 CG000502		MASSEY, DANNY	CPT WOOD TILE	555-999-8888	06/14/10	0	
	00 RSDALLAS		MASSEY, DANNY	CPT TILE	555-999-8888	06/14/10	0	
	00 RSDALLWD		MASSEY, DANNY	WOOD	555-999-8888	06/14/10	0	

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

Orders > 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.**

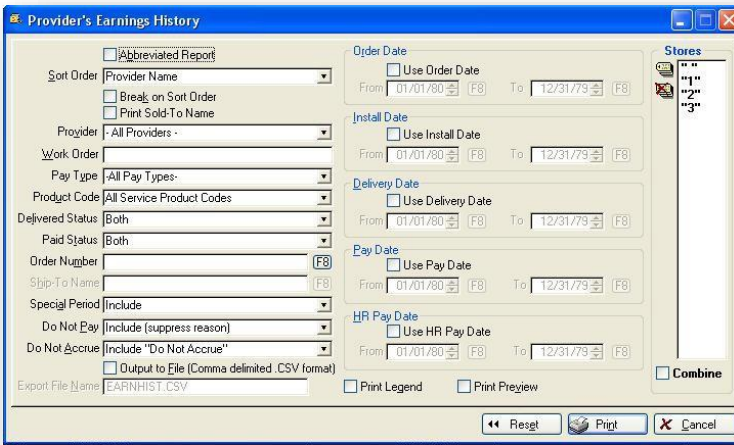
Processing order is important!

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.

Print Preliminary Commissions Report

Last Posted
Commissions Last Posted: 02/15/10

Dates
Ending Delivery Date: 03/15/13 F8
Ending Invoice Paid Date: 03/14/13 F8
Commission Date to Post: F8

Sort Details By
 Invoice Number Customer Name

Options
 Summary Report Only Page Breaks
 Line Commissions Report Print Preview
 Show Gross Profit Percent Print Ship To
 Print by Billing Group
 Subtotal each invoice on Line Commissions
 Print breakdown of Line Commissions
 Print zero-percent Line Commissions
 Print Gross Profit Amount
 Output CSV to SALES.COM.CSV

Sales People
SALES REPT

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

The screenshot shows a window titled "Customer Pickup" with a toolbar containing "Change City" and "Show History". Below the toolbar is a table with the following data:

Status	Date	Time	Line #	Roll/Item #	Item SeqNum	Style/Item Color/Desc
For Pickup			1	0190-26SR1P2	2	DAL-RITTENHOUSE 3 0190-ARC WHIT 2X6 S
			2	CG302660002		YOURS SINCERELY - VANILLA CREAM

Below the table is a "Name" field containing "Sabrina" and a signature area with a handwritten signature "Sabrina". To the right of the signature area are two buttons: "Save Signature" (green) and "Cancel Signature" (red).

Word Merge

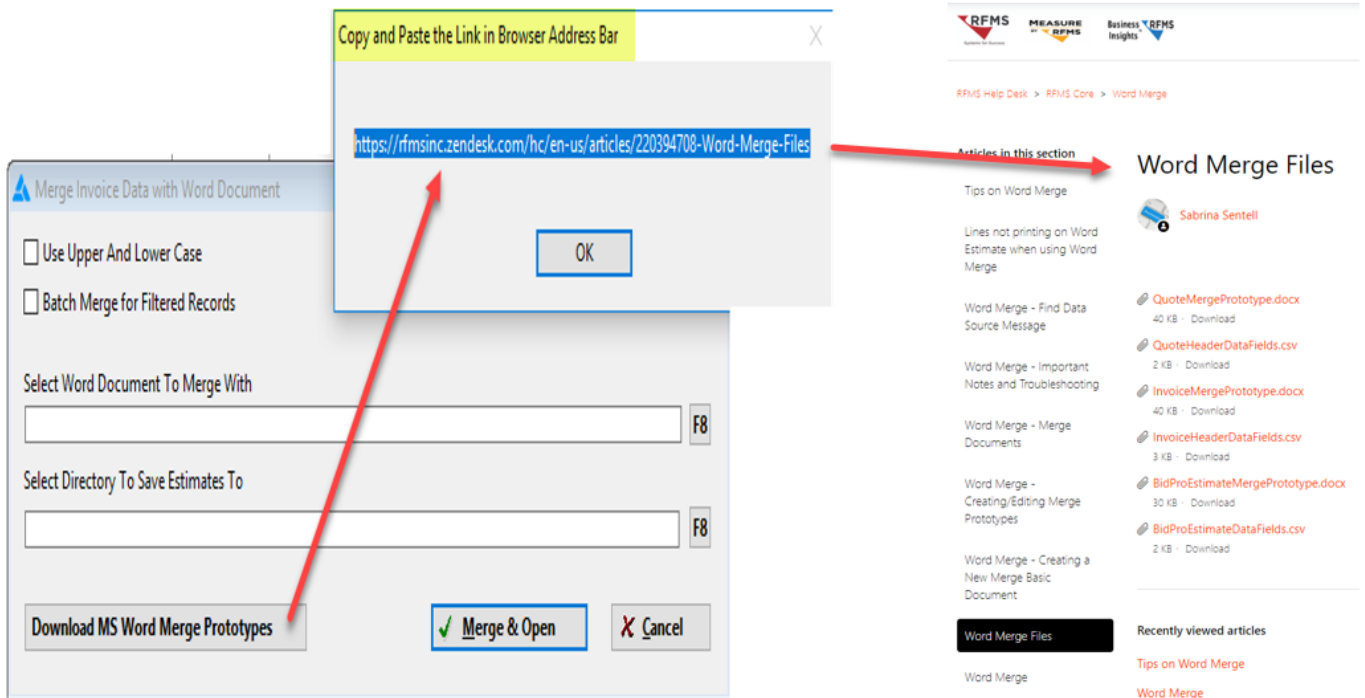


This feature exports the data from the selected records in Customer Orders, Quotes, or BidPro and creates a Microsoft Word Merge document for the Invoices, Quotes, or Estimates.

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.



Store	Order No	Delivered	Customer Name	PO Number	Type	JOB NUMBER	Tele #1	Phone 2	Ship-To Name	Ship-To Address #1	Customer Type	Ordered	EST DEL DATE	Entered	Ad Source	Order Type/TBD	Contract Type/TBD	Service
1	CG800011		ALFORD,DARREL		Original Order		896-378-3794	287-850-6447	ALFORD,DARREL	P.O. BOX 990, 5885 ET AVENUE	RETAIL	3/16/2018	3/16/2018					
3	CG800012		CASH & CARRY		Original Order						CASH & CARRY	3/16/2018	3/16/2018					
4	CG800013		NEWMAN,TAD		Original Order		905-509-5326	739-521-6922	NEWMAN,TAD	P.O. BOX 673	RETAIL	3/28/2018	3/28/2018					
5	CG800014		NEWMAN,TAD		Original Order		905-509-5326	739-521-6922	NEWMAN,TAD	P.O. BOX 673	RETAIL	3/28/2018	3/28/2018					
6	CG800015		ALBERT, GARRISON		Original Order		522-707-9046	576-231-8703	ALBERT, GARRISON	206-8277 LACUS. AV.	RETAIL	3/29/2018	3/29/2018					
7	CG800016		ALBERT, GARRISON		Original Order		522-707-9046	576-231-8703	ALBERT, GARRISON	206-8277 LACUS. AV.	RETAIL	3/29/2018	3/29/2018					
8	CG800017		ALBERT, GARRISON		Original Order		522-707-9046	576-231-8703	ALBERT, GARRISON	206-8277 LACUS. AV.	RETAIL	3/29/2018	3/29/2018					
9	CG800018		MANNING,COLE		Original Order	MANNING - LAM/VIN	343-203-1968	878-455-1634	MANNING,COLE	AP #674-3400 NISL ST.	RETAIL	4/11/2018	4/11/2018					
10	CG800019		MANNING,COLE		Original Order	MANNING - LAM/VIN	343-203-1968	878-455-1634	MANNING,COLE	AP #674-3400 NISL ST.	RETAIL	4/11/2018	4/11/2018					
11	CG800020		ALBERT, GARRISON		Original Order		522-707-9046	576-231-8703	ALBERT, GARRISON	206-8277 LACUS. AV.	RETAIL	3/29/2018	4/11/2018					
12	CG800021		PORTER,ARMAND	SAMPLE CHECKED OUT	Original Order		984-351-2656	256-271-9760			RETAIL	4/11/2018	5/10/2017	4/11/2018				
13	CG800022		PORTER,ARMAND	SAMPLE CHECKED OUT	Original Order		984-351-2656	256-271-9760			RETAIL	4/11/2018	5/10/2017	4/11/2018				
14	CG800023		HOMETOWN BUILDERS	9897456	Original Order		741-852-9633	741-845-9523		456 MAIN STREET	BUILDER	5/3/2018		5/3/2018				
15	CG800024	5/3/2018	HOMETOWN BUILDERS		Original Order		741-852-9633	741-845-9523		456 MAIN STREET	BUILDER	5/3/2018		5/3/2018				
16	CG800025		ADAMS,MACEY		Original Order		743-642-4147	778-682-1581	ADAMS,MACEY	908-5190 SED AVE	RETAIL	5/7/2018		5/7/2018				

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.

Supplier	SC	PC	Style/Item	Color/Desc	Roll/Item #	Width	Length	Item Size	Qty	Units	Unit Cost	Inv. #	Line	Total Cost	SKU
BEAULIEU	**	01	16K22 NATURES	IRISH SPRING		6.00	233.00	-----	155.33	SY	53.6400	CG800017	1	8,331.90	
BEAULIEU	**	01	16K22 NATURES	LONDON FOG		6.00	100.00	-----	66.67	SY	53.6400	CG800002	2	3,576.18	
BEAULIEU	**	01	HARMONY	EMERALD		12.00	850.00	-----	1,133.33	SY	44.1800	CG700002	1	50,070.52	
BEAULIEU	**	01	HARMONY	GRAYWOOD		12.00	950.00	-----	1,266.67	SY	16.3700	CG700002	3	20,735.39	
BEAULIEU	**	01	HARMONY	TAMPICO BROWN		12.00	900.00	-----	1,200.00	SY	16.3700	CG700002	2	19,644.00	
BEAULIEU	**	01	SHAG CARPET	AVOCADO		12.00	75.00	-----	100.00	SY	3.0000	CG800001	1	500.00	
CAPCO	**	05	3X6 SBN 6 SIDE	SEE DESCRIPTION	TGF-UCCB0813		0"		100.00	EA	0.9900	CG800023	3	99.00	
DAL-TILE CORPO	**	05	ACACIA VALLEY	ARK UNPOLISHED	1003		6"X36"		153.36	SF	52.8300	CG700077	2	8,102.01	
DAL-TILE CORPO	**	05	ACACIA VALLEY	ARK UNPOLISHED	1003		6"X36"		76.68	SF	52.8300	CG700078	2	4,051.00	
DAL-TILE CORPO	**	05	ACACIA VALLEY	ARK UNPOLISHED	1003		6"X36"		76.68	SF	52.8300	CG700078	9	4,051.00	

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.

DIFFERENT

Customer Name	Telephone #1	Customer #	Business
ACD BUILDERS	3435678987	737	
ACD BUILDERS	7898765343	767	

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/>



Notes:

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.



Notes:

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>