RFMS FOR BEGINNERS

RFMS Webinar Series 2018

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Contents

RFMS NAVIGATOR

Double click on the RFMS Icon on your Desktop to open RFMS Navigator

This is the opening screen of the RFMS Core System. The main RFMS Navigator allows the user to access different modules within RFMS. After selecting one of the options, the main screen for that module will appear.
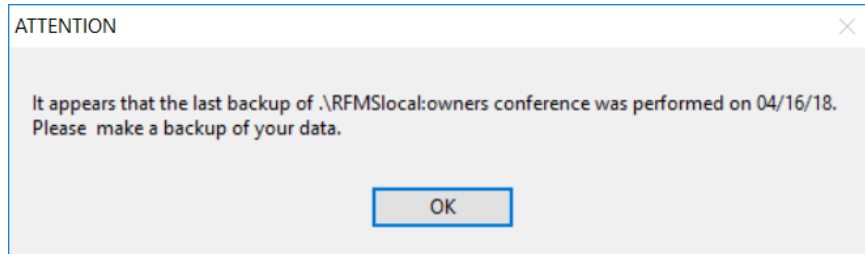

RFMS Updates

Each user will be notified with a pop-up box that a new update has been applied when entering the RFMS Navigator. This box will allow access to the Update document.
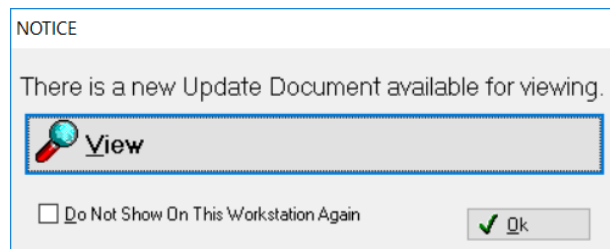
RFMS Back Ups

If the RFMS System detects that a Backup has not occurred for the DB, the user will see the following message in Order Entry. Contact your system administrator if you see this warning.

ATTENTION ×

It appears that the last backup of .\RFMSlocal:owners conference was performed on 04/16/18. Please make a backup of your data.

OK

Overview

The Order Entry Module consists of Customer Orders, Quotes, Claims and other Options needed for Sales Staff.

- Quotes
    - The Quotes module in RFMS Order Entry allows entering customer information just like a regular customer order. Since the screens look so similar a large green bar has been added to the Quotes screen for easy identification. Quotes can be printed and given to customers and saved for future reference. In addition, once the sale is closed, the quote can be easily imported into Order Entry as a regular customer order.
- Customer Orders
    - From the browse screen, add or edit open orders, print receipts, post payments, view line detail and print invoices. The tool bar at the top of the screen allows performing many functions to a customer order.
- Claims
    - This screen displays all claims, either open or job costed. It is the main screen where all activity regarding claim orders takes place.
- Batch Processing
    - 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.
- Customer File
    - The Customer List houses the names and addresses of customers. Customer records may be added, changed or deleted from this screen. The top portion is the same information seen when entering customer information while entering a customer order. Search for a customer record by either the LAST name, TELEPHONE #1 field, CUSTOMER number or by BUSINESS name.
- Provider Records
    - This screen displays records entered into the Provider's Earnings file. Provider records may also be added, edited or deleted here
- Inventory-
    - This selection displays inventory for Rolls and Items. This area is read only and not able to make any changed to inventory records.
- Products
    - This select displays Products for Rolls, Items and Services. This area is read only and not able to make any changes to product records.

Quotes

Adding a new Quote

- From the Main Navigator Screen single click on Order Entry
- Click the F4 on your keyboard or go to File Quotes
- Click on the Green Plus sign to add a New Quote
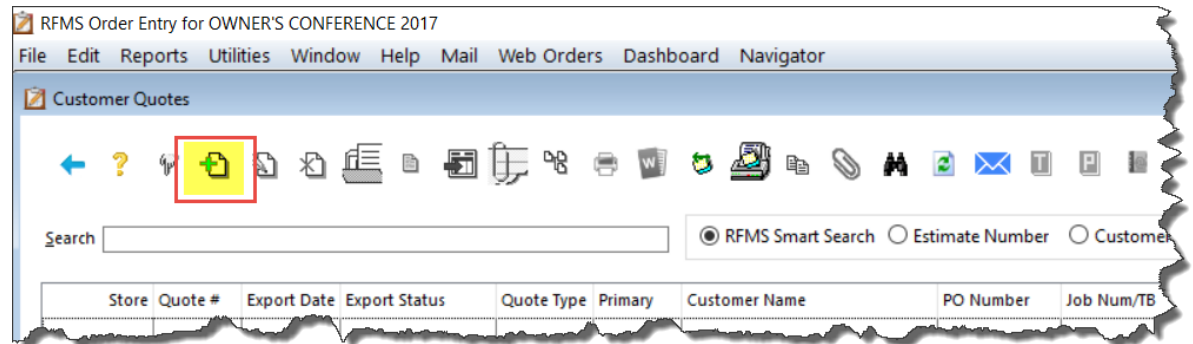
Quote Header Record

1. Order# - RFMS will create a system generated Quote Number / or you can type in your estimate number depending on your system options
2. Store- RFMS will select your default store set up in System Options or you can click the F8 button to open a list of Stores to choose from
3. Quote Date- will default to today's date. You may click the F8 button to open the calendar to choose another date
4. Sold to- Double click in the pink area to open the customer file to search or add a customer record to this Quote
5. Ship to- Double click in the pink area to open the customer file to search or add a customer Ship To or click the Blue Arrow to copy information from Sold To
6. Sales Rep #1/Sales Rep #2- Choose from the Drop down for a list of Sales Reps
7. Tax Status- Tax Status is always taxable unless set differently in the Customer File. Can also be changed on the Quote. Options are Taxable, Exempt and Resale

8. PO Number- Enter the customer's purchase order number, if applicable. This number will appear on all printed invoices, picking tickets, and billing notices.
9. Measure Date- Click on the F8 for the calendar to choose a Date (User Defined Prompt)
10. Est Del Date- Click on the F8 for the calendar to choose a Date (User Defined Prompt, can set to be required field)
11. Job Number- This field toggles to either Tax ID or User Defined Field
12. Customer Type- Click the down arrow to select a Customer Type for the order. This is a required field and could also populate from the Customer File

Adding a New Customer

Double click in the pink box labeled Sold To
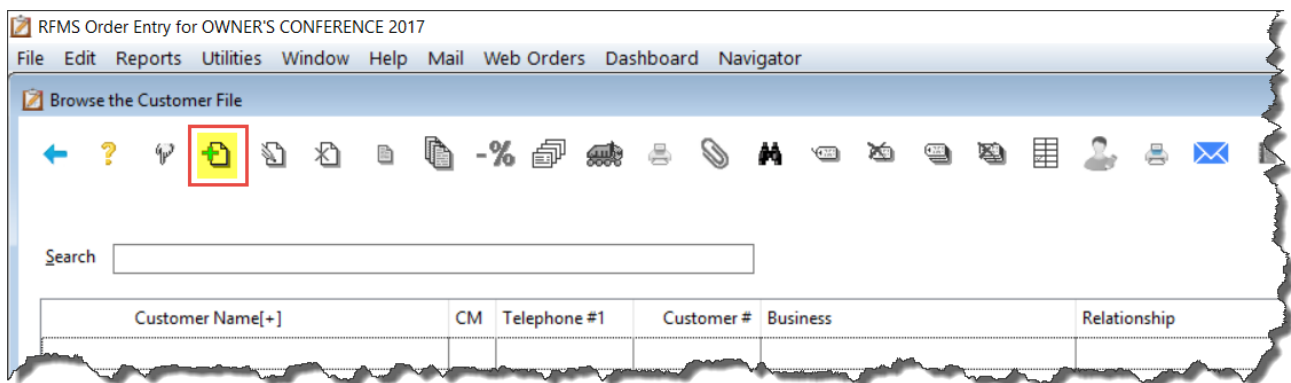
Browse the Customer File click the green plus sign to create a blank Customer Record

1. Customer Type is Required

2. Sold To – This is information regarding who will be invoiced
3. Enter telephone and email information
4. Ship To- Can be copied over from Ship to – Leave blank if this is a customer will always have a different ship to location. Examples: Builders/Property Managers/Designers etc…

Click ok to save the Customer Record
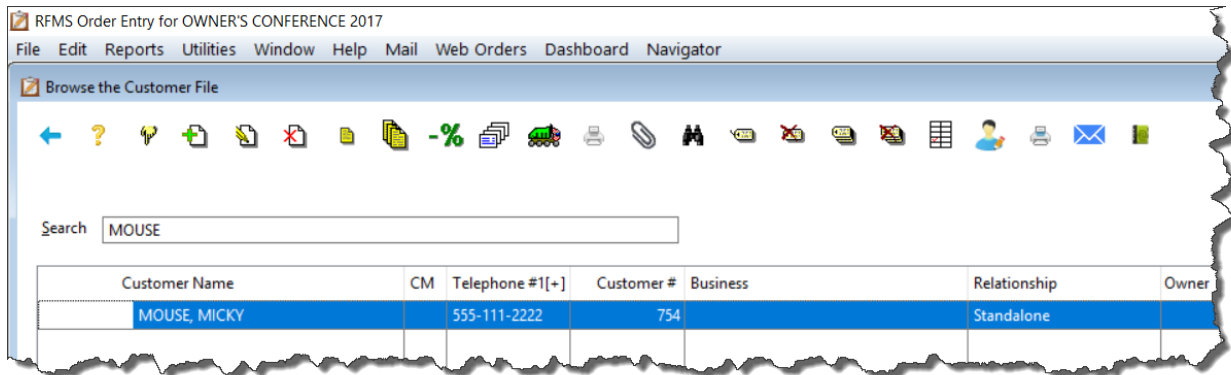
Once the Customer Record has been created in the Customer file, you can select it to bring over to your Quote.

*Selecting you can double click on the record, with it highlighted you can hit the enter key or you can select it by click on the finger icon to select.
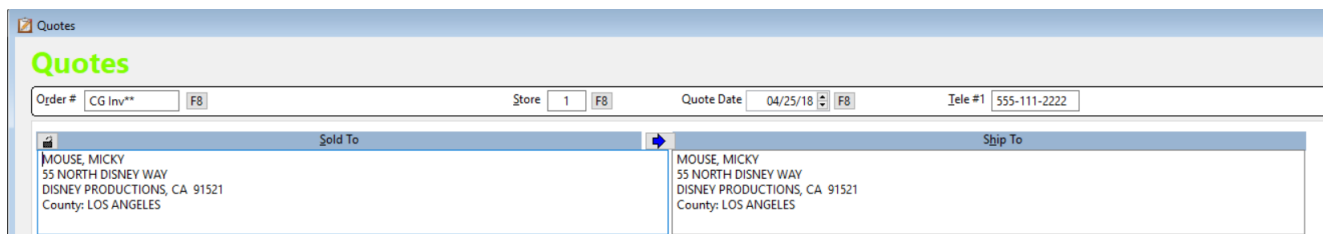
Adding Lines to Quote or Orders

Click on the Green plus to Insert a line or Choose the Multiple Green plus to add Templates

Choose from Order Line Assignment to choose from

1. Roll or Item Inventory – This will be material in your warehouse
2. Roll or Item Products – This will be material you offer to sale
3. Services – This will be the services you offer other than material
4. Unreferenced – This is gives you the option to type the material if you are not able to find it in Inventory or Products.

    *unreferenced lines depend on the settings in System Options

Inventory Selection

Start typing desired product here. Can type any portion of style name style number, roll number, item number, or even color. Press TAB on keyboard to start search.

Notice the quantity available appears in green in the Available column. Select the desired line of inventory by double clicking or click the finger button on toolbar.

1. Enter the Length or total Quantity
2. Click on the … to open the pricing
   a. Choose from Price Level
   b. Enter a Price per unit
   c. Enter line total

3. Choose Group
4. Select for sample check out – For Reporting of Samples checked out
5. Enter any Line notes if needed
6. Check stock
7. Click ok to save the record

Products Selection

Start typing desired product here. Can type any portion of style name style number, color. Press TAB on keyboard to start search.
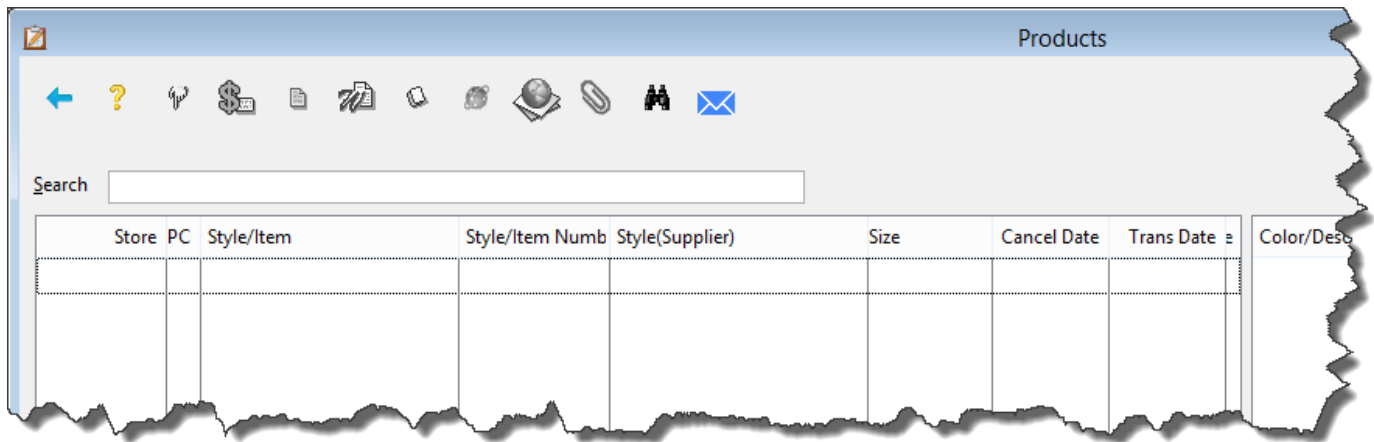
Select the correct product by double clicking on desired color on right hand side of screen
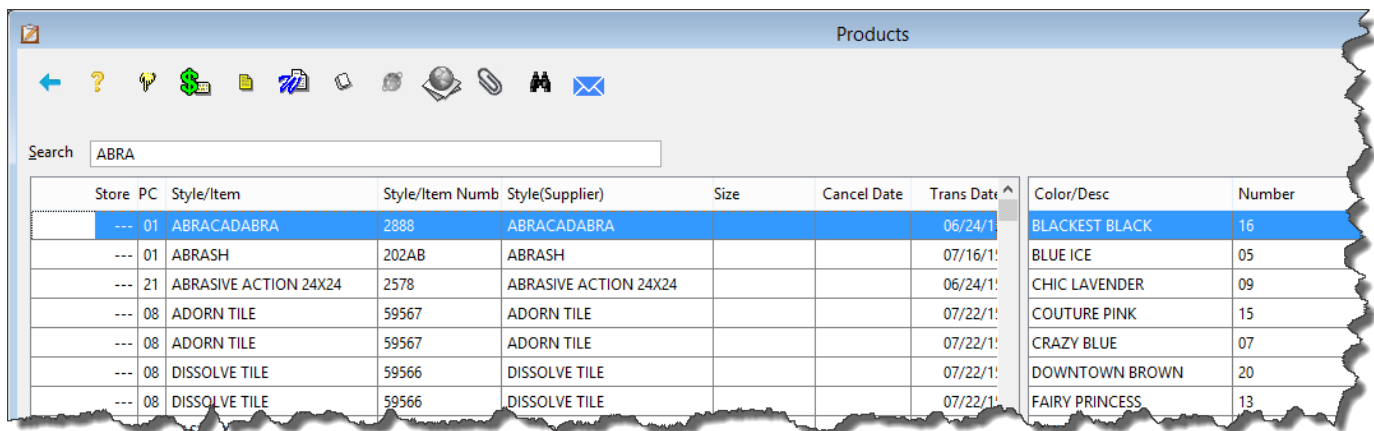
When you choose a product that is sold by the carton you will get an alert on the screen and will give you the option to let the system round up the quantity or you can override the quantity.
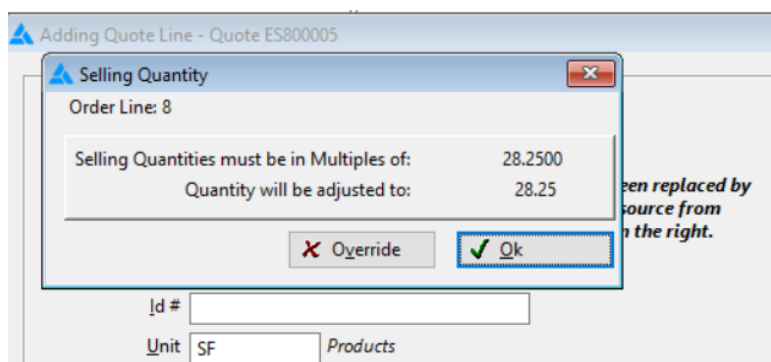
Associated Product Bundles

Associated Product Bundles are built on the color level.
When you are selecting Products, there is an option to choose a Bundles.

When you insert a line and search in Products for the material, you can see there is a bundle associated with it.

Select the Product by double clicking on the Description.
Enter the Quantity for the Master Record and click OK.

The system will prompt you to Post Lines from Associated Product Bundles. Click Yes.

You will Un-tag the lines you do not need to bring over to your Quote/Order. Click on the finger icon to select the Tagged lines.

The tagged lines will be inserted on to the Quote/Order.

05	38	CONTINENTAL SLATE FIELD TILE 12X12 PLAIN	BRAZILIAN GREEN PLAIN	12"	12"	60.00	SF		78.54	4,319.70
05	38	CONTINENTAL SLATE BULLNOSE 3X12 PLAIN	BRAZILIAN GREEN PLAIN	3"	12"	0.00	PC		28.76	0.00
05	38	CONTINENTAL SLATE COVE BASE 6X12 GLAZED	BRAZILIAN GREEN GLAZED	6"	12"	0.00	PC		27.34	0.00
05	38	CONTINENTAL SLATE COVE OUTSIDE CORNER 1X6 PLAIN	BRAZILIAN GREEN PLAIN	1"	6"	0.00	PC		31.96	0.00

Edit the line to enter the correct Quantity needed
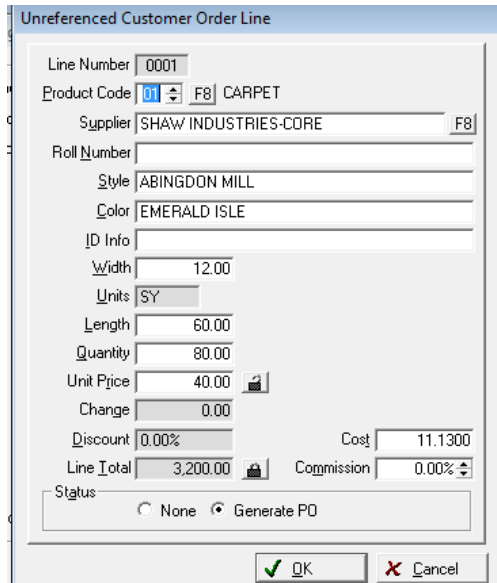
Unreferenced Line Entry

Unreferenced Lines are not connected to the Product list. Fill in Supplier, Item Number, Item Name, Description

Choose from Templates

The Product Templates feature allows creating product groupings for specific types of jobs in order to populate generic order lines as well as referenced product lines. This feature can be used to assist the order entry employee, especially if a particular job requires multiple materials that could be possibly forgotten or overlooked. One example is a Hardwood Install Template created that consists of transitions, glue and quarter round, in addition to the hardwood material.

1. Master Template Record
2. Products/Services in the Template
3. Tag only what you want to bring over to the order
4. Choose the Finger icon to select the lines to bring over to your Quote/Order

The lines came over to the order and you will need to double click on each line adjust to the correct Quantity.

Adding Notes

Clicking on the notes icon in the Quote
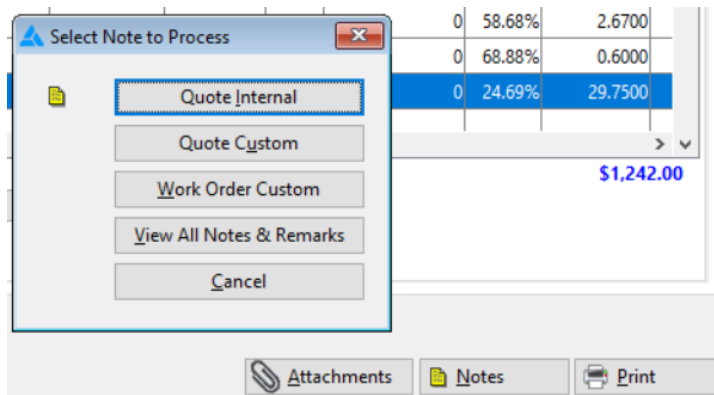
- Quote Internal Note is for internal communication never for a customer to see
- Quote Custom Note will print on the Customers Quote and Invoice
- Work Order Custom Notes will print on the Work Order for the installer
- View all Notes and Remarks

Notes in RFMS
There are several places to leave notes in RFMS. It is important that everyone in the company uses the notes for the same reason. Below are definitions for the notes available in RFMS.

NOTES: Notes are you BEST FRIEND! Really good idea to explain it now so you don't have to try and remember the story later.

Attachments

This selection allows adding, editing or deleting electronic files attached to specific records throughout RFMS.

- •A scanned copy of a contract could also be attached to a customer order.
- •Measure Files can be attached to quotes or customer orders.
- Weblinks to HOUZZ or Pinterest for design ideas. Or product selections and MSDS.
- Attachments can use different graphic picture formats as well as non-graphic files such as pdf, word, excel, text files Measure for RFMS and even sound(.wav) files.   Supported graphic formats are .bmp, .wmf, .pcx, .gif, jpg
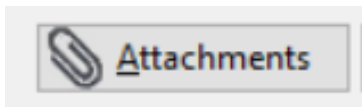
Click on the Insert icon
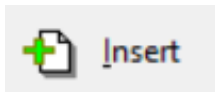
Choose the file you want to attach to your Quote/Order
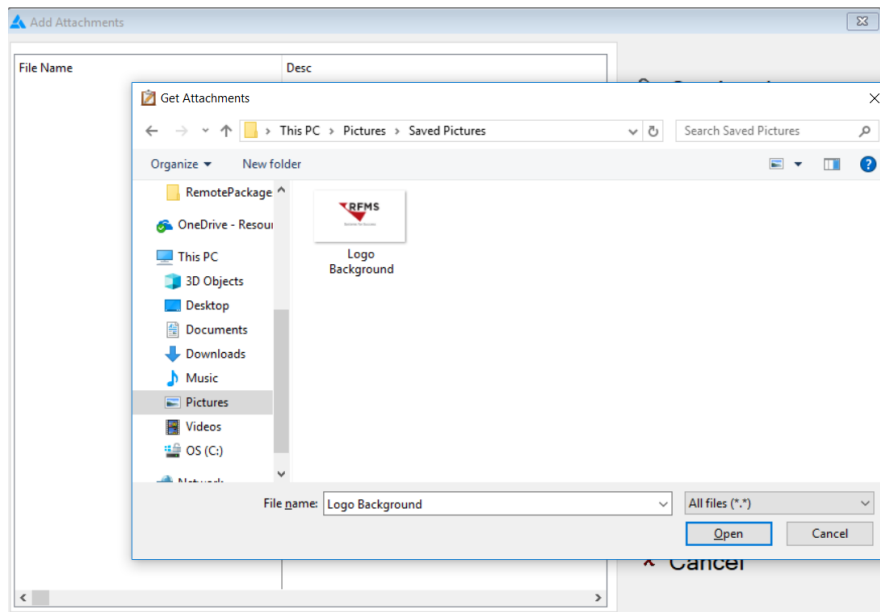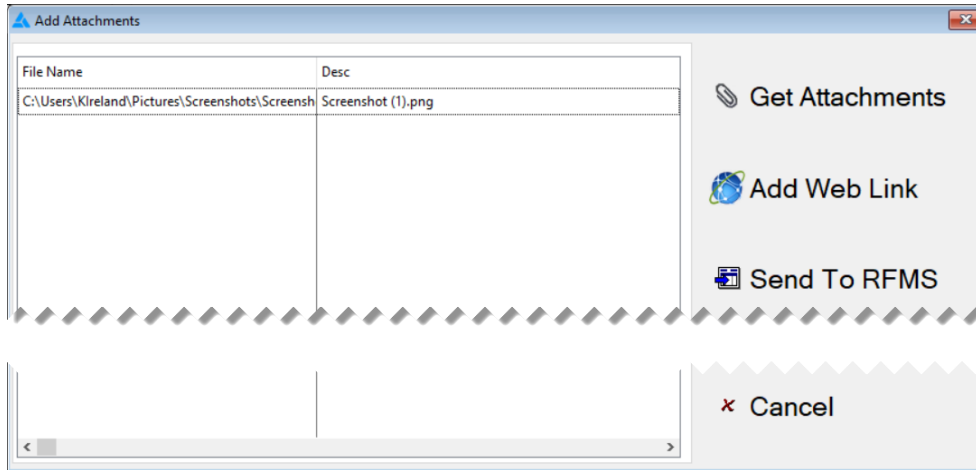
The Quote/Order will show there is an attachment. The attachments will export to the Customer Orders as well.

Printing Quote

If you plan to print the quote or email the quote you can do that within the Quote screen
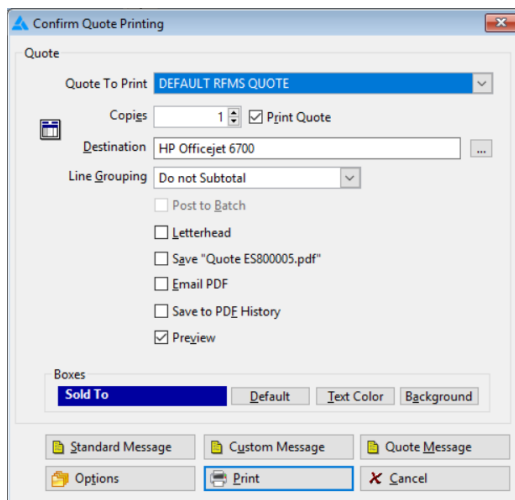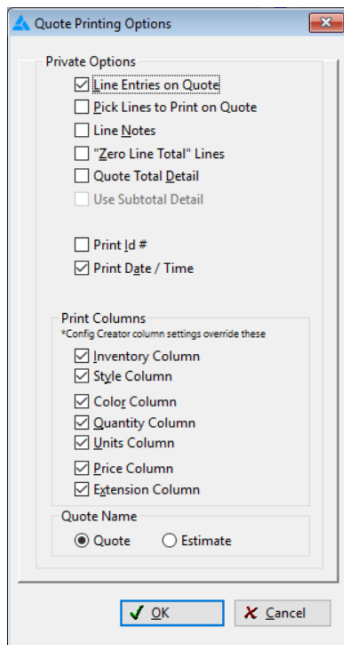
Choose your selections for Printing
> Messages
>> Standard Message will print on every Quote (Global)
>> Custom Message will print on this Quote only
>> Quote Message will print on every Quote (Global)

Options

Choose Options for print Quotes – This is a private setting for this workstation only. These settings will stick until changed.
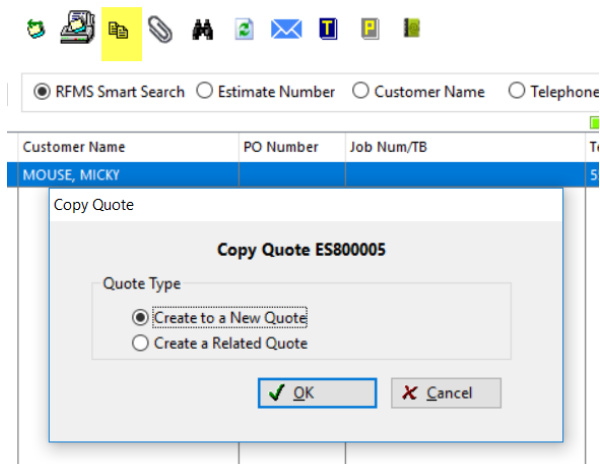
Copy Quote

You can copy a Quote to a new Quote or to a Related Quote

Select the Copy Icon and choose to Create a New Quote or Create a Related Quote
Click ok to Copy or Relate the Quote

Tag line lines you would like to copy over to New or Related Quote and select the Finger Icon to select the tag lines

A new Quote is created. You can go to that Quote and edit anything needed without having to build the Quote from Scratch.

New Quote ES800006 Created

OK

Exporting Quote to Customer Orders

Once the Quote has been approved by the customer and you are ready to export to Customer Orders With the Quote highlighted chose the Export Icon

Confirm the Export to a New Order by selecting Yes.

Confirm Export For: ES800005

Export Quote to New Order?

[Yes]   [No]
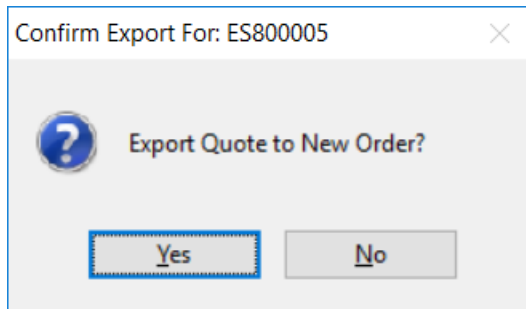
Verify the tagged lines you would like export to Customer Orders and select the Finger Icon to export lines

Quote Lines for ES800006

Number	Group	Product Code	Roll/Item #	Style/Item	Color/Description	Width	Quantity	Units	Price	Change	Line Total	Status
0001	1	01-CARPET	*UnRef*	ABSOLUTE ELEGANCE II - A	ANTIQUE IVORY	12.00	166.67	SY	28.11	0.00	4,685.09	None
0002	1	03-CARPET PAD	*UnRef*	KARASTEP RELAX - PAD BF	716	-----	166.67	SY	9.04	0.00	1,506.01	None
0003	1	65-CARPET INSTALL	*UnRef*	MULTI FAMILY REGULAR C		-----	166.67	SY	4.42	0.00	736.50	None
0004	1	65-CARPET INSTALL	*UnRef*	MULTI FAMILY FLOOR PRE		-----	3.00	EA	32.08	0.00	96.24	None
0005	1	65-CARPET INSTALL	*UnRef*	MULTI FAMILY STAIRS BO)		-----	15.00	EA	2.13	0.00	31.89	None
0006	1	65-CARPET INSTALL	*UnRef*	MULTI FAMILY FULL WRAF		-----	15.00	EA	6.46	0.00	96.92	None
0007	1	74-REMOVALS - DEMO	*UnRef*	TAKE UP/HAUL		-----	166.67	SY	1.93	0.00	321.35	None
0008		04-WOOD	*UnRef*	AMERICAN HERITAGE - EN	CANYON BROWN HICKOR	-----	28.25	SF	49.68	0.00	1,242.00	None

$0.00

Number of Lines: 8   Lines Tagged: 8

Create Order from Quote – Verify information and select Edit after Export and click ok

Create Order from Quote

Order #   [CG Inv**]   [F8]

Sales Rep #1   KERRI IRELAND

Sales Rep #2

☑ Edit After Export

[✔ OK]   [✗ Cancel]

Enter Order Number or [F8] for next CG Order Number

Edit After Export will open the Customer Order for you to process the order

Order Entry

How to launch Order Entry

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.

Type in words, numbers, dates, etc. into the Search field to get smaller amounts of information so what is needed is easier to find.

The more information that you can type in the Search field the closer you can get to what you are looking for.

Here is a great example. You remember part of a customer's name on an order that you discussed with a salesperson this morning. You type in what you think the name of the Customer is and you get all the information below.

Store	Order No	Delivered	Customer Name	PO Number	Type	UD JOB #	Work	Cell	Ship-To Name
* *	74194	03/23/04	WILSON, GEORGE		Original Order	623 HARTFORD	345-7638		WILSON, GEORGE
* *	74203	03/25/04	GLADNEY, CHRIS		Original Order	17574 GEORGE HARTIN RD	333-1249		GLADNEY, CHRIS
* *	74664	05/20/04	WALKER, GEORGE		Original Order	13079 OLIVERWOOD ROAD	205-339-3656		WALKER, GEORGE
* *	75948	06/01/05	BOYD, GEORGE		Original Order	11925 GRANDVIEW DRIVE	205-333-6145		BOYD, GEORGE
* *	76053	05/12/05	BOYD, GEORGE		Original Order	11925 GRANDVIEW DRIVE	205-333-6145		BOYD, GEORGE
* *	76146	06/15/05	OSWALT CONSTRUCTION		Original Order	51 CHEROKEE HILLS	205-333-5994	205-361-1307	HAMNER, GEORGE
* *	CG000505	05/18/00	REPL/ALADDIN		Original Order	3503 ACORN AVE-MEDLEY			MEDLEY, GEORGE & SHIR
* *	CG000784	07/06/00	COMP/MALONE & WALTERS		Original Order	WHITE			WHITE, GEORGE
* *	CG000990	08/24/00	BODLE, GEORGE **VOID**		Original Order				PAYROLL DEDUCT @ 3 E
* *	CG001248	11/03/00	BODLE, GEORGE		Original Order				
* *	CG001276	11/17/00	BODLE, GEORGE		Original Order				
* *	CG001353	12/22/00	BODLE, GEORGE		Original Order				
* *	CG001660	03/22/10	LAKE, GEORGE		Original Order	11987 ASPENWOOD DRIVE	205-292-3547		LAKE, GEORGE
* *	CG002119	06/16/10	TAYLOR, GEORGE		Original Order	231 17TH STREET	205-349-5922	205-765-2771	TAYLOR, GEORGE
* *	CG002648	08/18/10	FULGHAM, GEORGE		Original Order				FULGHAM, GEORGE
* *	CG101700	03/30/01	COMP/ LOWERY TILE SERVICE		Original Order	BURGESS			GEORGE BURGESS
* *	CG104419	10/07/11	NEWMAN, GEORGE		Original Order				NEWMAN, GEORGE
* *	CG104591	11/04/11	NEWMAN, GEORGE		Original Order				
* *	CG104748	12/09/11	GEORGE, ELOISE		Original Order	1701 CO RD 59	205-372-4165	205-000-0000	GEORGE, ELOISE

Search: GEORGE — ● RFMS Smart Search ○ Invoice Number ○ Customer Name ○ Telephone 1

You then remember the mention of the number 59 and you know the phone number is in area code 205. The information to choose from drastically decreases.

Search: GEORGE 59 205 — ● RFMS Smart Search ○ Invoice Number ○ Customer Name ○ Tel

Store	Order No	Delivered	Customer Name	PO Number	Type	UD JOB #	Work
* *	68464	02/28/02	COLLEGE STATION PROPERTIES		Original Order	376 ST GEORGE	205-759
* *	68477	07/25/00	COLLEGE STATION PROPER**VOID**		Original Order	375 ST. GEORGE	205-75
* *	68477B	07/26/00	COLLEGE STATION PROPERTIES		Original Order	375 ST. GEORGE	205-759-
* *	68479	07/26/00	COLLEGE STATION PROPERTIES		Original Order	374 ST. GEORGE	205-759-2
* *	69931	06/07/01	COLLEGE STATION PROPERTIES		Original Order	276 ST. GEORGE	205-759-
* *	70126	07/25/01	COLLEGE STATION PROPERTIES		Original Order	276, 278 ST. GEORGE	205-75
* *	73211	07/22/03	COLLEGE STATION PROPERTIES		Original Order	374 ST GEORGE	205-759-2
* *	73212	07/22/03	COLLEGE STATION PROPERTIES		Original Order	278 ST GEORGE	205-75
* *	75948	06/01/05	BOYD, GEORGE		Original Order	11925 GRANDVIEW DRIVE	205-333
* *	76146	06/15/05	OSWALT CONSTRUCTION		Original Order	51 CHEROKEE HILLS	205-333-5
* *	CG002119	06/16/10	TAYLOR, GEORGE		Original Order	231 17TH STREET	205-34
* *	CG104748	12/09/11	GEORGE, ELOISE		Original Order	1701 CO RD 59	205-3
* *	CG901980	04/06/09	HERITAGE HEALTH CARE	CARPET	Original Order	1225 KINGS MTN RD	205-755

Below is a list of fields that the RFMS Smart Search looks at in each module.

Orders/Quotes/Claims
Invoice Number
Customer Name
Job Name
Job Number (User Defined Field)
PO Number
Telephone 1
Customer Address 1
Job Address 1

Customer
Customer Name
Customer Address 1
Ship Name
Ship Address 1
Sold-To Business
Ship-To Business
Email
Telephone 1
Sold-To City
Customer Number

Items from Order Entry

Style
Color
Item Number
Supplier
A/P Invoice Number
PO Number
System Reference Number
Sidemark
Comments
Color Number
Style Number
Product Code

Inventory from Order Entry
Style
Color
Roll Number/Item Number
Supplier
A/P Invoice Number
PO Number
Color Number
Style Number
Product Code

Products
Private Style
Private Style Number
Private Color

Item Inventory
Style
Color
Item Number
Supplier
A/P Invoice Number
PO Number
System Reference Number
Sidemark
Comments
Serial Number
Product Code

Roll Inventory
Style
Color
Roll Number
Supplier
A/P Invoice Number
PO Number
System Reference Number
Sidemark
Comments
Color Number
Style Number
Product Code

Purchase Orders
PO Number
PO Line Number
Supplier
Style
Color
Sidemark
Order Date

A/P

Supplier
Invoice Number

Customer Orders Browse

The Tool Bar

	Exit	
	Help	CLICK F1 FOR HELP
	Select	Activates or selects the highlighted record.
	Insert	Adds a new record.
	Edit	Allows changes to the highlighted record. Job costed orders cannot be edited.
	View Order	Allows you to view a customer order when the order has been job costed.Option only available on job costed orders
	Void	Allows a customer order to be voided if there have been no payments entered.
	Change Order	Allows Credit Memos and Add-Ons attached to the highlighted customer order to be VIEWED. Order cannot be job costed. You must add change orders from the customer order.
	Overages	Allows overages to be added to the highlighted customer order.
	Billing Notice	Allows you to create Billing Groups.
	View Lines	Displays a screen showing all lines on the highlighted order.
	Post Payment	Allows a payment to be posted to the highlighted order.
	View Receipt	Displays a listing of all payments posted to the highlighted order. If there are no payments posted to the order, this button will not be available.
	Credit Check	Displays a screen showing all written sales, balance due and credit limit for the highlighted customer name.
	View Notes	Add, edit or delete notes for the highlighted record. After a note has been added a small button will appear in the far-left column of this screen.
	Post Providers Earnings	Allows entering provider charges for the highlighted customer order. The Integrate Provider's Earnings option must be set to yes in System Options. For job costed orders, this selection allows viewing only of provider records for that order.
	Work Orders	Allows you to add a work order to the highlighted order. You may also tag work order lines for printing.

	Job-Cost	Allows you to job cost the highlighted customer order if all lines are in a cut or delivered status.
	UnJob-Cost	If the customer order has been job costed, the button appears with a large red "X". Click on this button to un-job cost the order.
	Attachments	Add, edit or delete attached files for the highlighted record.
	View Job Cost	Displays job cost information for the highlighted customer order IF the order is in has been job costed or unjob costed at least once.
	Print	Allows printing various documents for the highlighted order. Invoice (delivered jobs only), Acknowledgment (un-delivered), Receipt History, Picking Ticket, Work Order, Job Cost Sheet, Billing Notice, Estimate Job Cost Sheet.
	List A/R	Displays a listing of customer order information based on selection.
	Find	Find allows searching for records using numerous criteria. When in user the button will be blue.
	Reset	Clicking this button to resets the List, displaying ALL records with no Find in effect.
	Refresh	Refreshes the Browse screen to include recent changes.
	Baseline	Creates a baseline of the highlighted order or allows a comparison of a previous baseline with the current status of the order.
	Schedule Pro	Selecting this option allows either allows setting an alert in Schedule Pro or will open the Schedule pro program depending on the settings.
	RFMS InterOfficeMail	Send RFMS Internal mail or email in reference to the highlighted record.
	Tracking	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.
	Client Management Module	Clicking on the button, allows the highlighted record to be added to a project, have an alert, appointment, task, or remark added or a letter can be related to it.
	Customer Pickup	Click the button to create a signature area for material to be picked up by client.
	Web Order Import	Clicking this button imports web orders. If the button is red, web orders are present.

On Customer Order Browse Screen, you can see status of the orders

- Yellow Note icon indicates there is a note on the order
- Paperclip icon indicates there is an attachment on the order
- Green $ sign indicates there is a balance due on the customer order
- Calendar / Book Icon indicates the Job has been alerted or scheduled in Schedule Pro
- Date in Delivered Column indicates the Job has been closed

Customer Order Edit

Where to view status, lines, etc.

Line Statuses

Order Line Status

None	➢No action taken
Gen PO	➢Line selected for Purchase Order creation
On Order	➢No date - Line has gone through Auto PO (To buy list and moved to to be ordered)
On Order with Date	➢Purchase order has been generated, the date is the promise date.
Reserved	➢Materials received
Cut	➢Materials are selected for staging
Staged	➢Picking Ticket has been printed for material in cut status (ERRM only)
Delivered	➢Delivery Ticket has been printed for material in staged status
Job Costed	➢job is complete

Payment

1. Payment Date should never be changed
2. Reference – Text field
3. Choose Register
4. Enter amount of payment
    a) E for entire amount
    b) D for difference
5. Comments- Text field
6. Click ok

If a mistake is made on a payment it must be reversed and corrected.

THERE IS NO UNDO OR EDIT OPTION ONCE A PAYMENT HAS BEEN POSTED

Notify Purchasing for Special Order Material
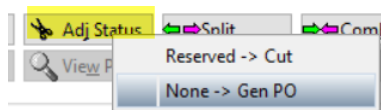
Single Line
Change Line status from None to Gen PO

Multiple Lines
Click the Adjust status and choose None-> Gen PO

System will automatically tag the material lines that are in none status
Select the finger icon to select tag lines to change status

Lines are now in Gen PO status
Once you save the Order it will alert Purchasing to order this material

| Group	PC	Roll/Item #	Style / Item Name	Color / Description	Width	Length	Quantity	Units		Price		Total	Status	Line #	Est Del	St
1	01		ABSOLUTE ELEGAN	ANTIQUE IVORY	12.00	125.00	166.67	SY		28.11		4,685.09	Gen PO	0001		n
1	03	KS	KARASTEP RELAX -	716	6'	37'	166.67	SY		9.04	🔒	1,506.01	Gen PO	0002		n

Creating a Purchase Order directly from Customer Orders

You can create Purchase Orders directly from the Customer Order
    Verify the line status is in Gen PO status

Group	PC	Roll/Item #	Style / Item Name	Color / Description	Width	Length	Quantity	Units		Price		Total	Status	Line #	Est Del	St
1	01		ABSOLUTE ELEGAN	ANTIQUE IVORY	12.00	125.00	166.67	SY		28.11		4,685.09	Gen PO	0001		n
1	03	KS	KARASTEP RELAX -	716	6'	37'	166.67	SY		9.04	🔒	1,506.01	Gen PO	0002		n

Click on the Express Purchase Order Generation Icon
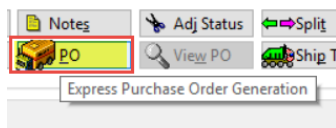
PO Gen Info 2 – Once you make your choices here, they are sticky until you change them again. Make your selections and verify the selections each time you create a Purchase Order

PO Gen Info 1

- Call the Supplier and order the material
- Verify the Cost
- Taken By – is required field. Enter who you spoke with
- Promise Date is required field. Enter the promise date
- Comments-
- Reference#

Once details are entered on the Purchase Order Click the option to Generate Purchase Order ONLY
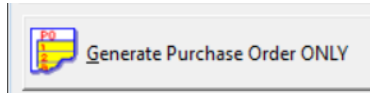
Lines are in an On-Order status with promise date

Roll/Item #	Style / Item Name	Color / Description	Width	Length	Quantity	Units	Price	Total	Status	Line #
CG8000090001	ABSOLUTE ELEGAN	ANTIQUE IVORY	12.00	125.00	166.67	SY	28.11	4,685.09	On Order 04/29/18	0001

Are my materials here?

You can view your order and the line status from View Lines Icon in the tool bar.
Search and Highlight the Order and click on view lines
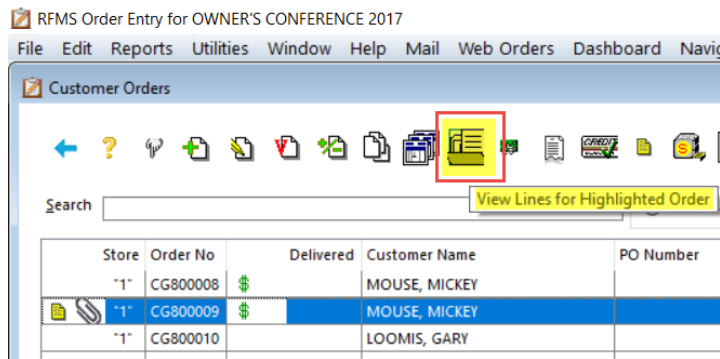
From View Lines you are able to view Customer Order without locking up the Order.
You can see the line status to determine if your material has arrived
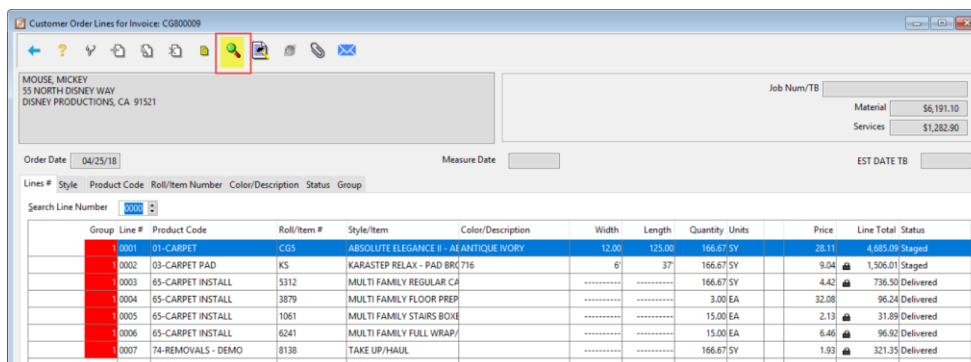
Click on Magnify Glass to View Purchase Order

Details about the Purchase Order can be viewed

Staging Customer Orders

Picking Ticket

Use this document to give permission for material to leave the warehouse
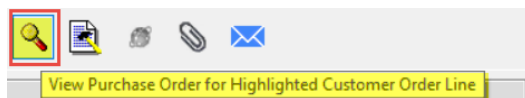
Open Customer Order and adjust the lines status. Choose the Adj Status Icon
Choose Reserved -> Cut

Tag the lines that will need to be in Cut status – Material leaving the warehouse
Select with the finger icon

Lines are now in a cut status and ready for Picking Ticket

With order highlighted Click on the Print Icon or Right click and choose Print

Select Picking Ticket

Pick Date-Enter the date to stage the materials. This defaults to the system date but can be changed to a future date.

Copies-Enter the number of copies of the picking ticket to print.

Print Line Notes-Check this box to print the line notes from the customer order line.

Edit Picking Ticket Instructions-Check this box to enter new instruction notes or to edit existing notes.

Print Ship-To Notes-This option is used to print the Customer additional Ship to address notes if used.

Print Balance Due-Check this box to print the balance due as of the time the picking ticket is printed. This feature is useful if the service provider will be collecting monies at the time of installation or delivery.

Print Areas-Check this box to print the cut size for lines that have work order areas assigned to them. One line for carpet may have 3 different areas for the work order. Select this option when printing the picking ticket and the 3 cuts will print right below the style and color line (prints the work order lines).

Print Barcode for Item SRN-Check this box to print a barcode of the item's system reference number on the picking ticket.
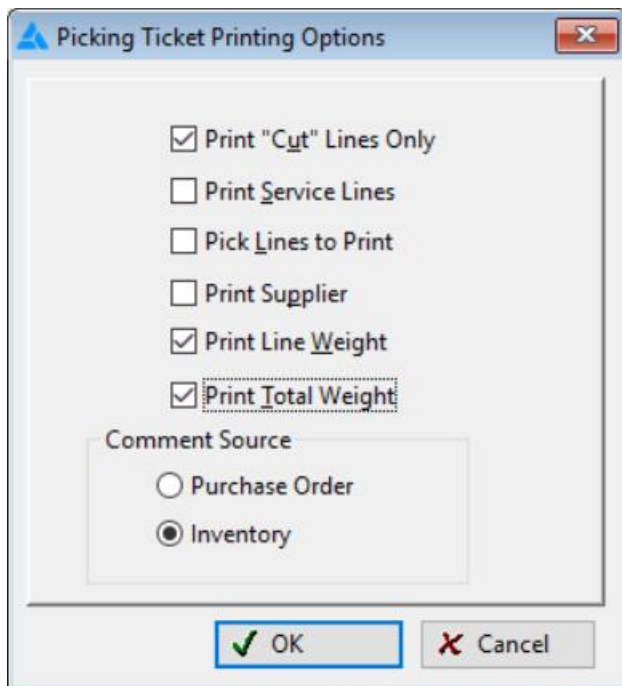
Print Estimated Delivery Date
- None
- Header: prints the estimated delivery date for the header only.
- Lines: prints the estimated delivery date for the lines only.
- Both: prints the estimated delivery date for both.

Print Green Bar-Check this box to see colored highlighting on every other line for easier reading.

Save to PDF History-Check this box to save a pdf copy of the work order.

Preview Picking Ticket-Click here to view a copy of the picking ticket before sending it to the printer.

Picking Ticket options

Print "Cut" lines only-If this option is selected, only those lines that are in a "CUT" status on the customer order will print on the picking ticket. If you are using the Billed Not Shipped feature, this option is not available.

Print Service Lines-If the service lines entered on a customer order should be printed on the picking ticket, select this option. If you are using the Billed Not Shipped feature, this option is not available.

Print Supplier-To print the Supplier name on the picking ticket, select this option. This option can expedite the gathering of inventory if arranged by supplier.

Print Line Weight-Checking this box displays the Unit Ship weight and the Line Total Ship Weight. The Line Total Ship Weight is the weight which is the unit shipped weight x the quantity.

Print Total Weight-This is the total shipped weight for the whole ticket

Comment Source - Choose Purchase Order or Inventory

Picking Ticket
OWNER'S CONFERENCE 2017

Invoice:
CG800009

Pick Date:
04/25/18

Sold To	Ship To
MOUSE, MICKY	MOUSE, MICKY
55 NORTH DISNEY WAY	55 NORTH DISNEY WAY
DISNEY PRODUCTIONS, CA 91521	DISNEY PRODUCTIONS, CA 91521

Customer Purchase Order:
Sales Representative: KERRI IRELAND
Paid in Full: No

Tele #1 : 555-111-2222

Prod Code	Roll/Item No.	Width	Beginning Amount	Amount Required	Ending Amount	Units	Status	Location	Store	Sign
*Line # 0001	ABSOLUTE ELEGANCE II - ABAC - WELDLOK - 12FT 00IN/ANTIQUE IVORY									
01	CG5	12'0''	125'0''	125'0''	0'0''		CUT		''1''	_____
Color Number: 502										

Line Total Ship Weight: 14541.9575
Comments: SHIP VIA MOHAWK TRUCK

Style#/Color#: 2N35/502

Promise Date: 04/29/18

Prod Code	Roll/Item No.	Width	Beginning Amount	Amount Required	Ending Amount	Units	Status	Location	Store	Sign
*Line # 0002	KARASTEP RELAX - PAD BROADLOOM - 06FT 00IN/716									
03	KS		167.00	166.67	0.33	SY	CUT		''1''	_____
Color Number: 716										

Unit Ship Weight: 41.6 oz
Line Total Ship Weight: 433.34 lb

Width x Length: 6'X37'

Promise Date: 04/25/18

Total Shipping Weight: 433.34 lb

───────── Picking Ticket Instructions ─────────

Work Orders

Use this document for installer instructions

With the order highlighted Click the Work Order Icon or right click and choose Work Order

With the Work Order Screen open

1. Edit the areas
2. Tag Lines needed for this work order
3. Split lines and areas if needed
4. Export any line notes
5. Print Work Order

Print Order -This is the order in which the following information will appear on
the printed copy of the Work Order.
- Area-Selecting this option will print areas first on the Work Order.
- Customer Order Line Number-Selecting this option will print Customer Order Line Number first on the Work Order.
- Product Code/Style/Color/Inventory # - Selecting this option will print Product Code (1st), Style, Color and Inventory # on the Work Order.

Print Work Order Line Notes-Selecting this will display all notes associated with this Work Order.

Print Balance Due-Selecting this option will print the balance of the entire customer order associated
with this work order line.

Print Rate-Selecting this option will print the rate used.

Print Labor-Selecting this option will print the cost of labor information.

Print Sales Representative(s)-Selecting this option will include all sales people associated with this customer order on your work order.

Encrypt Labor-Use this option to conceal Labor Information. If print labor is selected, the rate
for all service lines can be printed in a way that only those who know the encryption key will be able to read the rate.

Letterhead-By selecting this option, the Company Information that is normally included on a
Work Order is removed to make room at the top/center for printing on Letterhead paper.

Print Shipping Instructions-This feature is related to the Ship To button located on the Notes screen.

Print Color Number-This Color Number is pulled in if a product exists on this work order that was downloaded
using the EC Module.

Print SKU-This SKU number is pulled in if a product exists on this work order that was downloaded
using the EC Module.

Print Order's Custom Notes-Check this box to have the Order's Custom Notes printed on the Work Order.

Copies-Enter the amount of copies that you wish to print in this field.

Email Work Order-Check this box to have the work order emailed as a PDF

Save to PDF history-Check this box to save a pdf copy of the work order.

Preview Work Order

AR Due Button

Viewing Customer A/R Information

Click the Due Icon to view Customer Accounts Receivable information

Choose the Report Type

Select your Parameters- If you have a Customer Order highlighted, it will default to that Customers AR info.

Choose the Sub Sort

Click OK to view the Results

Order Entry File Menu

From Order Entry File Menu. You can access information from Inventory and Products module. This information is for viewing only and no editing can be done from these screens.
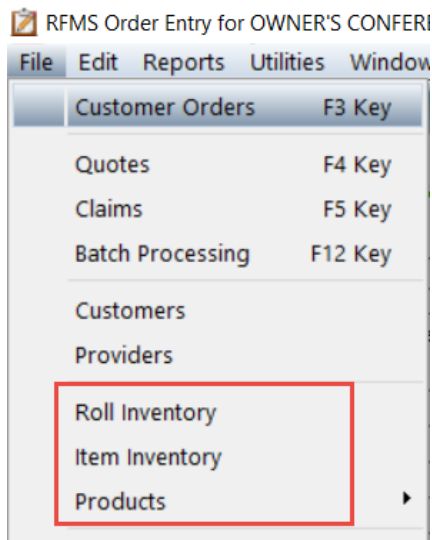
From File-Roll or Item Inventory you can search the warehouse for physical inventory
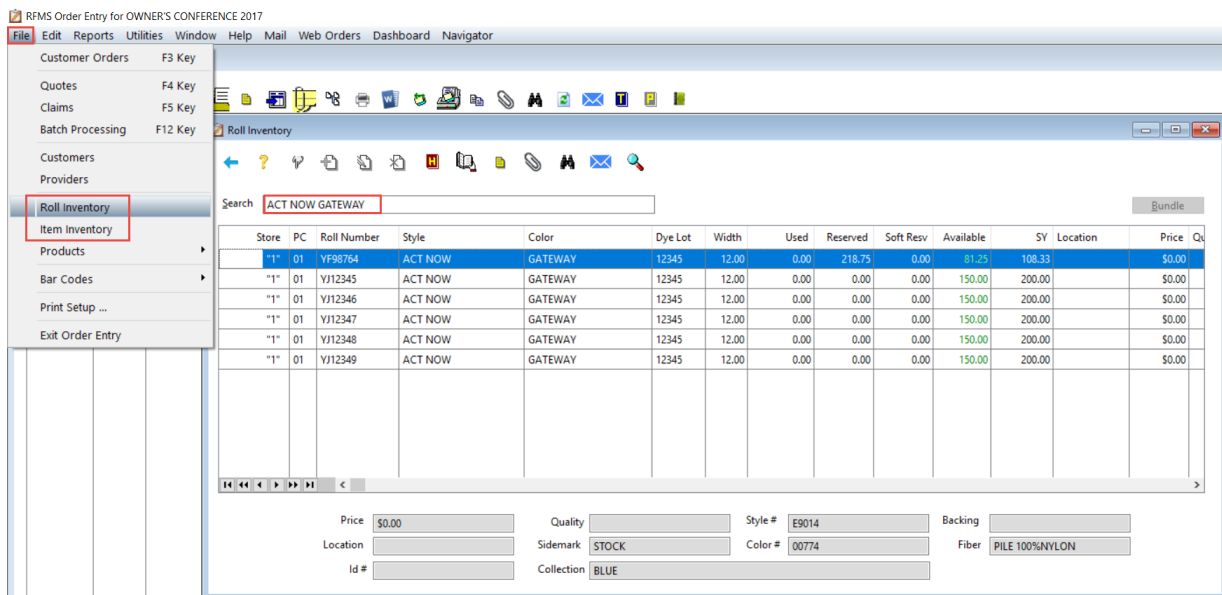
From File-Products you can search the Product Catalog for Product details and pricing
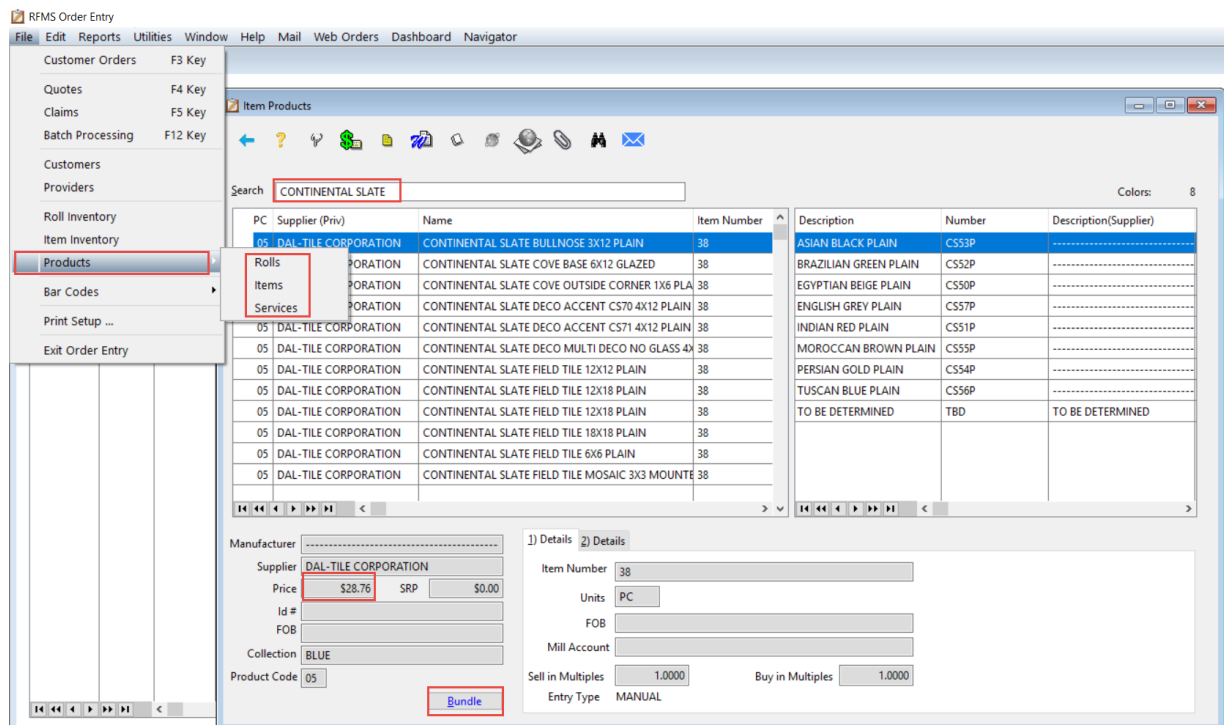
Batch Processing

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.
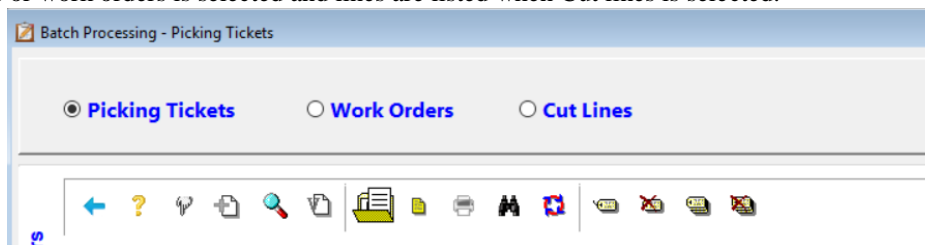
Choose the option you want to Batch Process
Click on the Filter to find the orders to batch process
Tag the Orders or lines you want to Batch Process

Cut Lines – Will Batch cut tagged lines that are ready to be Cut
Picking Tickets- Will Batch Print Picking Tickets for tagged orders as long as the lines are in Cut Status
Work Orders- Will Batch Print Work Orders you tag from Customer Orders or Claims