



RFMS FOR BEGINNERS

RFMS Webinar Series 2018

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RFMS NAVIGATOR

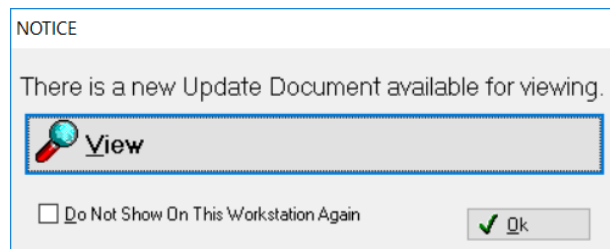
Double click on the RFMS Icon on your Desktop to open RFMS Navigator

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.



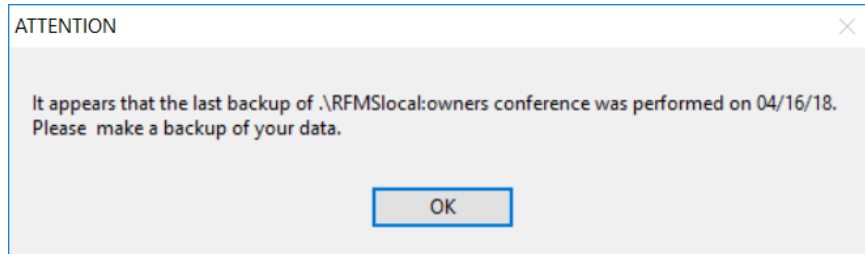
RFMS Updates

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.



Overview

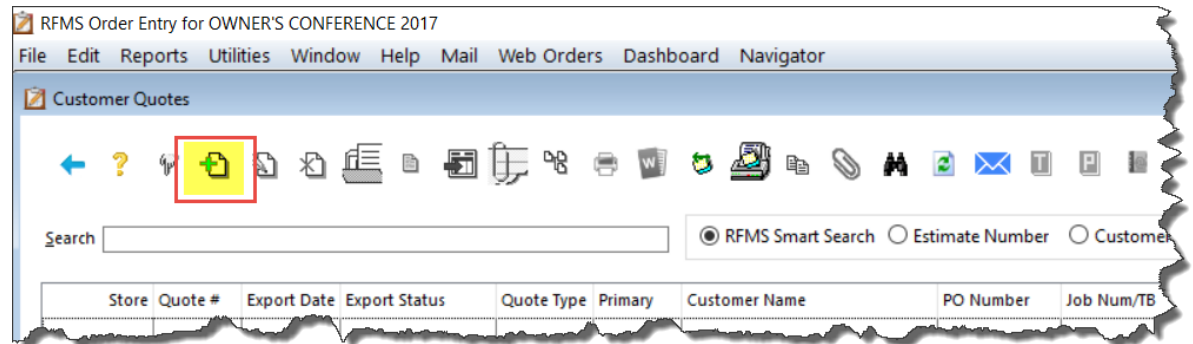
The Order Entry Module consists of Customer Orders, Quotes, Claims and other Options needed for Sales Staff.

- 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

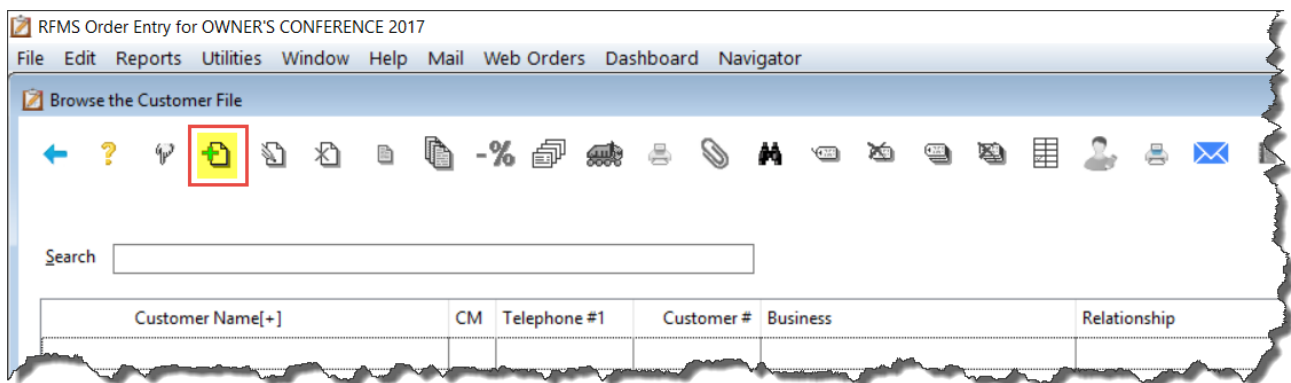
6 Sales Rep #1/Sales Rep #2 Choose from the Drop down for a list of Sales Reps

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

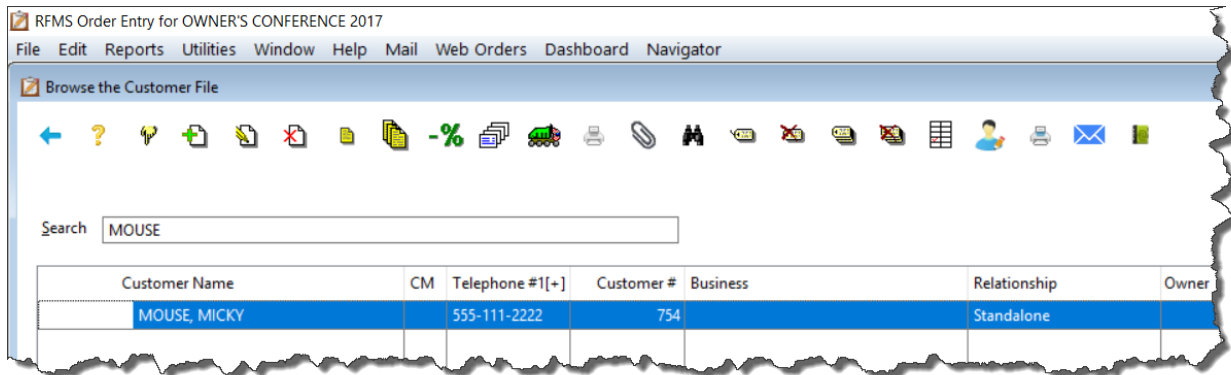


Browse the Customer File click the green plus sign to create a blank Customer Record

1. Customer Type is Required

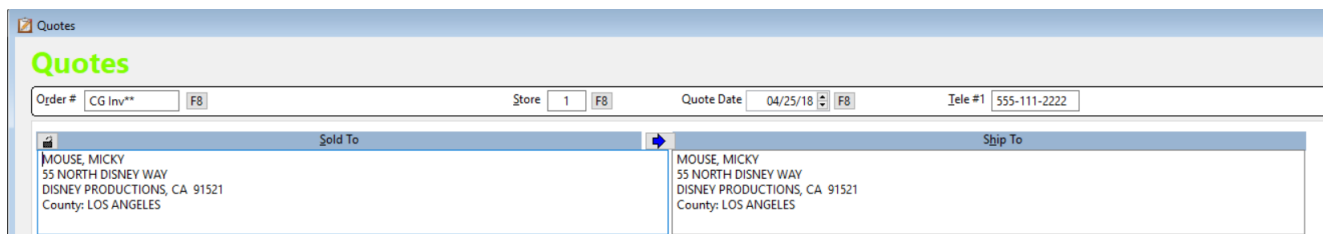
2. Sold To – This is information regarding who will be invoiced
3. Enter telephone and email information
4. Ship To- Can be copied over from Ship to – Leave blank if this is a customer will always have a different ship to location. Examples: Builders/Property Managers/Designers etc...

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

Quotes

Order # Store Quote Date

Sold To

MOUSE, MICKY
55 NORTH DISNEY WAY
DISNEY PRODUCTIONS, CA 91521
County: LOS ANGELES

MOUSE, MICKY
55 NORTH DISNEY WAY
DISNEY PRODUCTIONS, CA 91521
County: LOS ANGELES

Navigation: [Back] [Forward] [Home] [End] [Search] [Print] [Refresh] [Close]

Buttons:

Adding Quote Line - Quote ES800005

Line Number Product Code CARPET

Roll Number *[F8] has been replaced by selecting source from buttons on the right.*

Style Color Id #

Unit Unreferenced

Width Bill Length Ship Length

Bill Quantity Ship Quantity

Bill Price Ship Price

Total Ship % of Bill

Group

☐ Sample

Order Line Assignment:

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

Buttons:

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

[illegible]

Roll/Item Inventory

Search

Store	PC	Roll / Item Number	Style / Name	Color / Description	Seq.	Lot	Width	Length	Used	Reserved	Soft Resv	Available	Price
00	01	#ST000190001	ABRACADABRA	CHIC LAVENDER	0		12	0	ON ORDER	0.00	0.00	125.00	0.00
00	01	#ST000190002	ABRACADABRA	CHIC LAVENDER	0		12	0	ON ORDER	0.00	0.00	125.00	0.00
00	01	#ST000190003	ABRACADABRA	FAIRY PRINCESS	0		12	0	ON ORDER	0.00	0.00	125.00	0.00
00	01	#ST000190004	ABRACADABRA	JUST PEACHY	0		12	0	ON ORDER	0.00	0.00	125.00	0.00
00	12	AM260XMTC-28	AMELIA	2.6X7.9	13		2.6	7.9	0.00	0.00	0.00	1.00	0.00
00	12	AM260XMTC-28	AMELIA	2.6X7.9	14		2.6	7.9	0.00	0.00	0.00	1.00	0.00
00	12	AM260XMTC-28	AMELIA	2.6X7.9	15		2.6	7.9	0.00	0.00	0.00	1.00	0.00

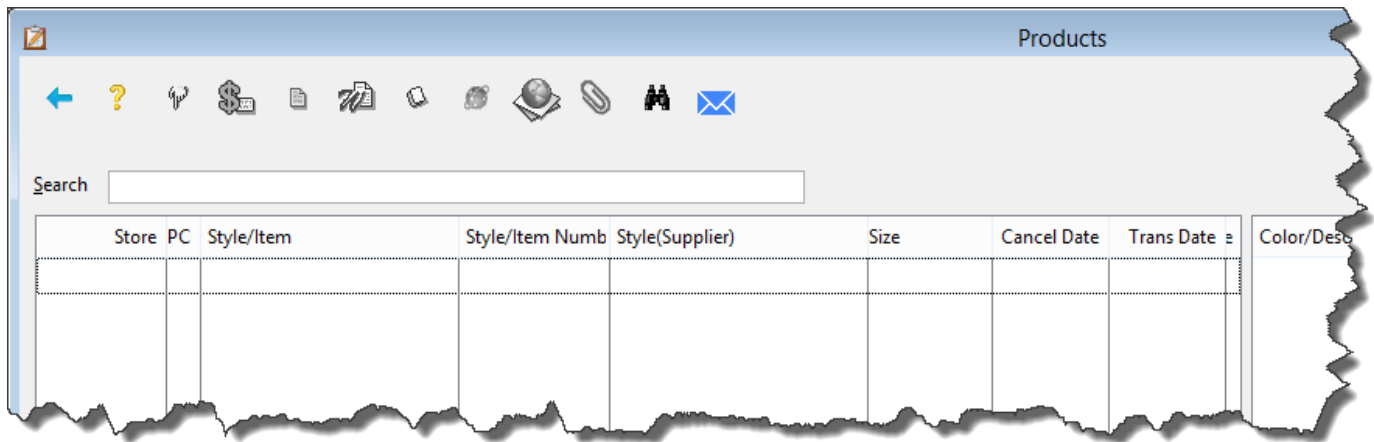
8

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

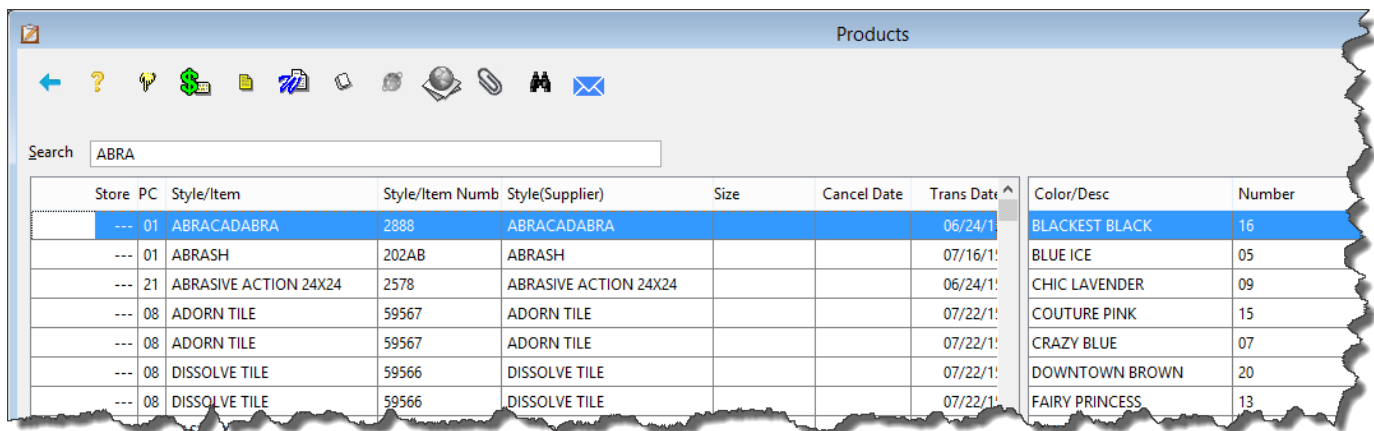
3. Choose Group
4. Select for sample check out – For Reporting of Samples checked out
5. Enter any Line notes if needed
6. Check stock
7. Click ok to save the record

Products Selection

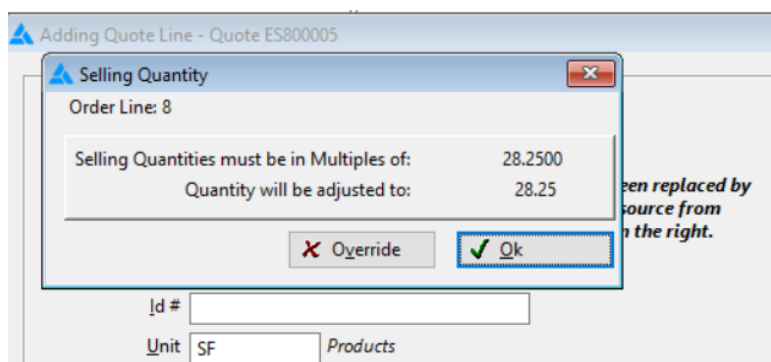
Start typing desired product here. Can type any portion of style name style number, color. Press TAB on keyboard to start search.



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.

Item Products

Search: CONTINENTAL SLATE FIELD TILE 12X12

PC	Supplier (Priv)	Name	Item Number	Name(Supplier)	Size	Unit	Description	Number
05	DAL-TILE CORPORATION	CONTINENTAL SLATE FIELD TILE 12X12 PLA	38	-----	12"X12"	47	ASIAN BLACK PLAIN	CS53P
							BRAZILIAN GREEN PLAIN	CS52P
							EGYPTIAN REIGE PLAIN	CS50P

Manufacturer: Supplier: DAL-TILE CORPORATION Price: \$78.54 SRP: \$0.00 Id #: FOB: Collection: ORANGE Product Code: 05

1) Details 2) Details

Item Number: 38 Units: SF FOB: Mill Account: Sell in Multiples: 15.0000 Buy in Multiples: 15.0000 Entry Type: MANUAL

Bundle

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

Adding Quote Line - Quote E5800006

Line Number: 0009 Product Code: 05 TILE Item Number: 38 Item Name: CONTINENTAL SLATE FIELD TILE 12X12 F Description: BRAZILIAN GREEN PLAIN Id #: Unit: SF Products Item Width: 12" Item Length: 12" Bill Quantity: 0.02 Ship Quantity: 0.00 Bill Price: 78.54 Ship Price: 78.54 Total: 0.00 Ship % of Bill: 100.0000% Group: F8

☐ Sample

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

Associated Bundle

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

Associated Products Bundle

☒ ? Post Lines from Associated Products Bundle?

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.

Associated Product Bundles

Source	Bundle Name	PC	Style / Name	Style #	Size	Color / Description	Retail Price	Roll Cost	Cut Cost
MANUAL	CONTINENTAL SLATE FIELD TILE 12X12 PLAIN 05		CONTINENTAL SLATE FIELD TILE 38			BRAZILIAN GREEN PLAIN	78.54	-----	47.03

Products in selected Associated Product Bundle

PC	Style / Name	Style #	Size	Color / Description	Color #	Retail Price	Roll Cost	Cut Cost	Supplier
05	CONTINENTAL SLATE BULLNOSE 3X12 PLAIN	38		BRAZILIAN GREEN PLAIN	CS52P	28.76	-----	17.2200	DAL-TILE CORP
05	CONTINENTAL SLATE COVE BASE 6X12 GLAZED	38		BRAZILIAN GREEN GLAZED	CS52G	27.34	-----	16.3700	DAL-TILE CORP
05	CONTINENTAL SLATE COVE OUTSIDE CORNER	38		BRAZILIAN GREEN PLAIN	CS52P	31.96	-----	19.1400	DAL-TILE CORP
05	CONTINENTAL SLATE FIELD TILE 12X12 PLAIN	38		BRAZILIAN GREEN PLAIN	CS52P	78.54	-----	47.0300	DAL-TILE CORP
05	CONTINENTAL SLATE FIELD TILE 12X18 PLAIN	38		BRAZILIAN GREEN PLAIN	CS52P	13.53	-----	8.1000	DAL-TILE CORP
05	CONTINENTAL SLATE FIELD TILE 18X18 PLAIN	38		BRAZILIAN GREEN PLAIN	CS52P	67.17	-----	40.2200	DAL-TILE CORP
05	CONTINENTAL SLATE FIELD TILE 6X6 PLAIN	38		BRAZILIAN GREEN PLAIN	CS52P	61.67	-----	36.9300	DAL-TILE CORP
05	CONTINENTAL SLATE FIELD TILE MOSAIC 3X3 N	38		BRAZILIAN GREEN PLAIN	CS52P	86.22	-----	51.6300	DAL-TILE CORP

Red indicates that the product has been deleted and needs to be replaced

Price Tag One Un-Tag One Tag All Un-Tag All

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

Changing Quote Line - Quote ES800006

Line Number: 0010

Product Code: 05 TILE

Item Number: 38

Item Name: CONTINENTAL SLATE BULLNOSE 3X12 P

Description: BRAZILIAN GREEN PLAIN

Id #:

Unit: PC Products

Item Width: 3"

Item Length: 12"

Bill Quantity: 5.00

Ship Quantity: 5.00

Bill Price: 28.76

Ship Price: 28.76

Total: 143.80

Ship % of Bill: 100.0000%

Group: F8

Sample: ☐ Sample Info

Order Line Assignment

Roll Inventory - [Ctrl-R]

Item Inventory - [Ctrl-I]

Roll Products - [Ctrl-P]

Item Products - [Ctrl-D]

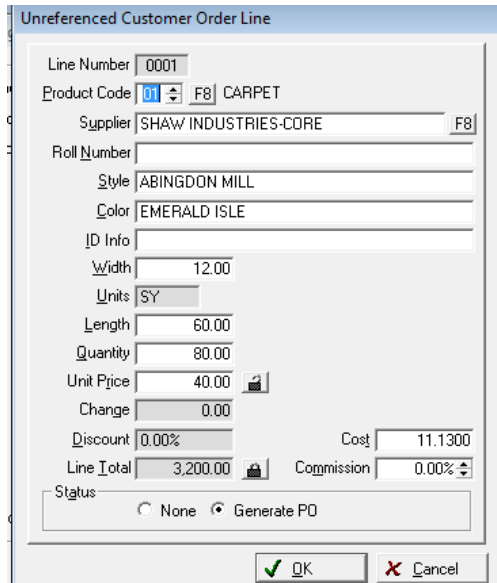
Services - [Ctrl-S]

Unreferenced - [Ctrl-U]

Notes Available OK Cancel

Unreferenced Line Entry

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



The image shows a software dialog box titled "Unreferenced Customer Order Line". It contains various input fields for creating a new order line. The fields are organized as follows:

- Line Number:** A text box containing "0001".
- Product Code:** A dropdown menu showing "01" and "F8" with "CARPET" as the description.
- Supplier:** A text box containing "SHAW INDUSTRIES-CORE" and a small "F8" icon.
- Roll Number:** An empty text box.
- Style:** A text box containing "ABINGDON MILL".
- Color:** A text box containing "EMERALD ISLE".
- ID Info:** An empty text box.
- Width:** A text box containing "12.00".
- Units:** A dropdown menu showing "SY".
- Length:** A text box containing "60.00".
- Quantity:** A text box containing "80.00".
- Unit Price:** A text box containing "40.00" with a small icon.
- Change:** A text box containing "0.00".
- Discount:** A text box containing "0.00%".
- Cost:** A text box containing "11.1300".
- Line Total:** A text box containing "3,200.00" with a small icon.
- Commission:** A text box containing "0.00%" with a small icon.
- Status:** A section with two radio buttons: "None" and "Generate PO" (which is selected).

At the bottom of the dialog box are two buttons: "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).

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.

Product Templates 1

☐ Show templates with names like:

☐ Export Master Record

Product Template Name	PC	Style / Name	Style / Item Number	Color / Description	Color / Item Number
BUILDER CARPET	1				
BUILDER TILE	1				
MF CARPET	1				
WOOD GLUE INSTALL PREFINISHED	67	WOOD GLUE INSTALL PREFINISHED	8724		
S&F EXISTING WOOD FLOOR 2 COATS	67	S&F EXISTING WOOD FLOOR 2 COATS	1861		
CORK LAMINATE INSTALL	69	CORK LAMINATE INSTALL	7978		
LAMINATE INSTALL	69	LAMINATE LAMINATE REMOVAL	8885		
STOCK PAD CHOICES	03				

Products in selected Product Template 2

PC	Style / Name	Private Style / Name	Style / Item Number	Color / Description	Color
03	3/8 - REBOND PAD - 6 FT	3/8 - REBOND PAD - 6 FT	MH/SPEC38	3/8"	SPEC
03	7/16 - REBOND PAD - 6 FT	7/16 - REBOND PAD - 6 FT	SPEC716	7/16"	7/16"
65	MULTI FAMILY REGULAR CARPET INSTALL	MULTI FAMILY REGULAR CARPET INSTALL	5312		
65	MULTI FAMILY FLOOR PREP	MULTI FAMILY FLOOR PREP	3879		
65	MULTI FAMILY STAIRS BOXED WATERFALL	MULTI FAMILY STAIRS BOXED WATERFALL	1061		
65	MULTI FAMILY FULL WRAP/PIE STEPS	MULTI FAMILY FULL WRAP/PIE STEPS	6241		
74	TAKE UP/HAUL	TAKE UP/HAUL	8138		

☐ Default to Export Master Record checked
 ☐ Default to all Template Lines tagged
 3

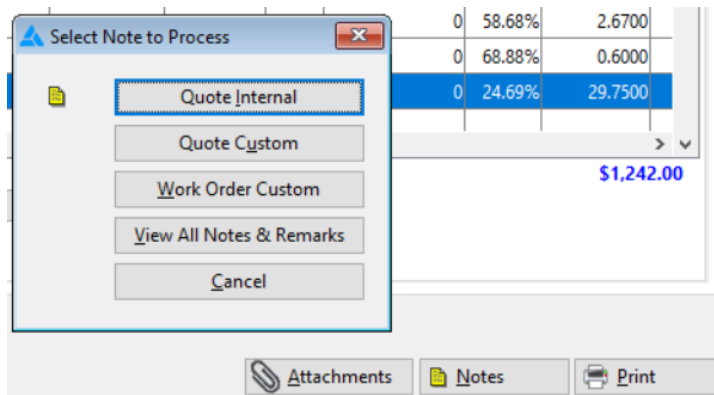
1. Master Template Record
2. Products/Services in the Template
3. Tag only what you want to bring over to the order
4. Choose the Finger icon to select the lines to bring over to your Quote/Order

Group	PC	Roll/Item #	Style / Item Name	Color / Description	Width	Length	Quantity	Units	Price	Total	Status	Line #	Est Del	Store	Item Sequence
	1	01	ABSOLUTE ELEGANT	OCEAN SPRAY	12.00	125.00	166.67	SY	18.12	3,020.06	None	0001		n/a	
	1	03	KS	KARASTEP RELAX - 716	6'	37'	166.67	SY	8.67	1,445.03	None	0002		n/a	
		65	5312	MULTI FAMILY REG			1.00	SY	4.24	0.00	None	0003		n/a	
		65	3879	MULTI FAMILY FLO			1.00	EA	30.78	0.00	None	0004		n/a	
		65	1061	MULTI FAMILY STA			1.00	EA	2.04	0.00	None	0005		n/a	
		65	6241	MULTI FAMILY FULL			1.00	EA	6.20	0.00	None	0006		n/a	
		74	8138	TAKE UP/HAUL			1.00	SY	1.85	0.00	None	0007		n/a	

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

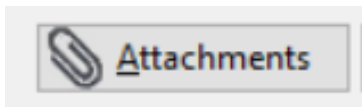
There are several places to leave notes in RFMS. It is important that everyone in the company uses the notes for the same reason. Below are definitions for the notes available in RFMS.

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.

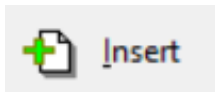
Attachments

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

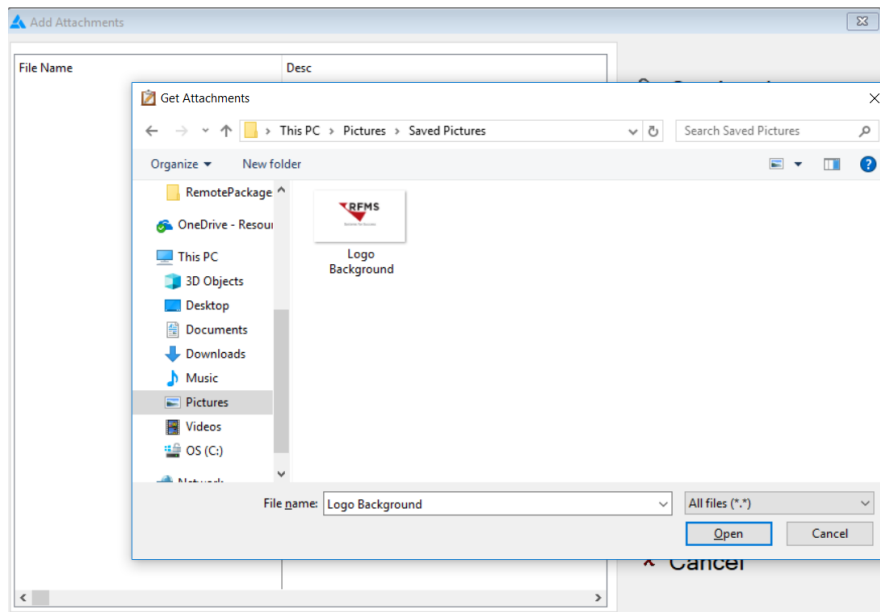
- A scanned copy of a contract could also be attached to a customer order.
- Measure Files can be attached to quotes or customer orders.
- Weblinks to HOUZZ or Pinterest for design ideas. Or product selections and MSDS.
- Attachments can use different graphic picture formats as well as non-graphic files such as pdf, word, excel, text files Measure for RFMS and even sound(.wav) files. Supported graphic formats are .bmp, .wmf, .pcx, .gif, jpg

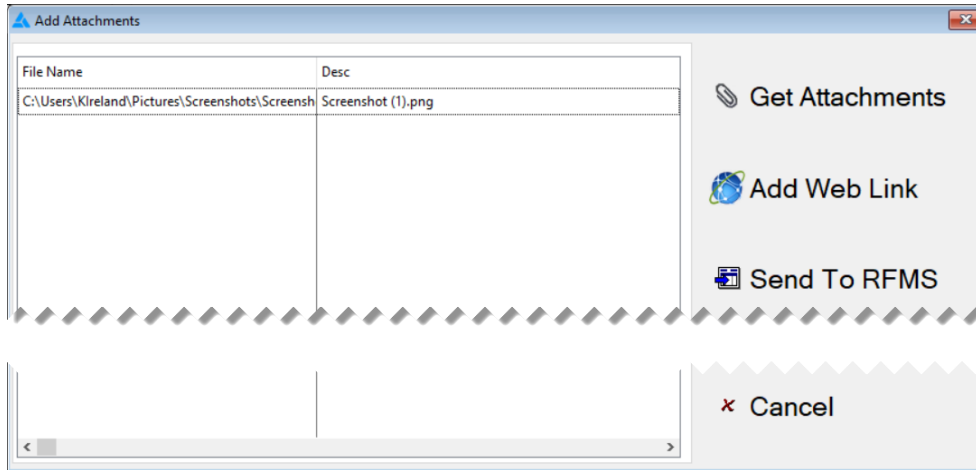


Click on the Insert icon



Choose the file you want to attach to your Quote/Order



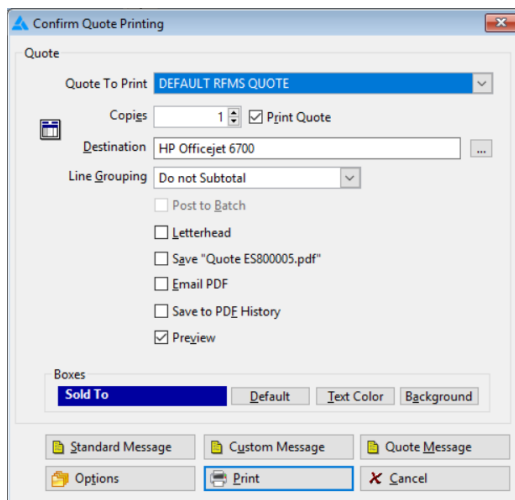


The Quote/Order will show there is an attachment. The attachments will export to the Customer Orders as well.

Store	Quote #
"1"	ES800005

Printing Quote

If you plan to print the quote or email the quote you can do that within the Quote screen

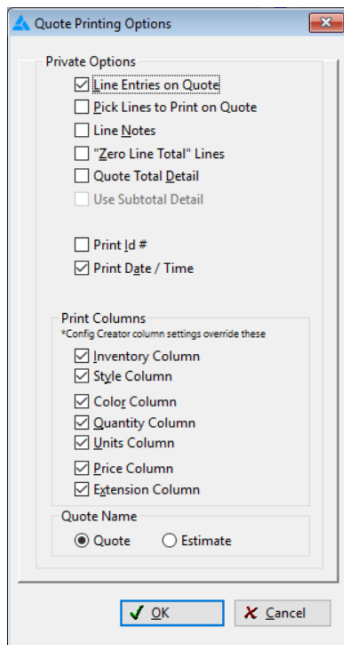


Choose your selections for Printing Messages

- 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.



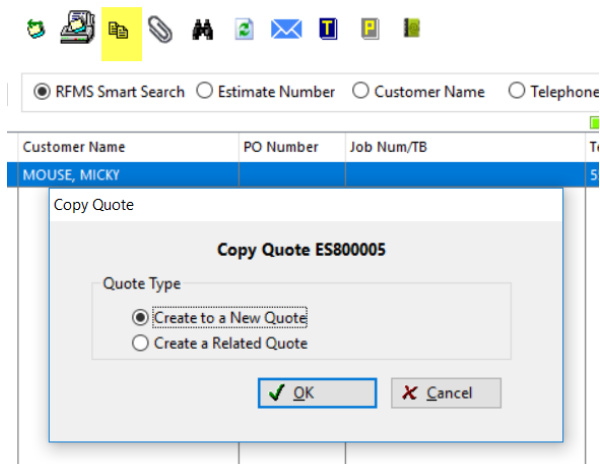
The 'Quote Printing Options' dialog box contains the following settings:

- Private Options**
 - ☒ Line Entries on Quote
 - ☐ Pick Lines to Print on Quote
 - ☐ Line Notes
 - ☐ "Zero Line Total" Lines
 - ☐ Quote Total Detail
 - ☐ Use Subtotal Detail
 - ☐ Print Id #
 - ☒ Print Date / Time
- Print Columns**
*Config Creator column settings override these
 - ☒ Inventory Column
 - ☒ Style Column
 - ☒ Color Column
 - ☒ Quantity Column
 - ☒ Units Column
 - ☒ Price Column
 - ☒ Extension Column
- Quote Name**
 - ☒ Quote
 - ☐ Estimate

Buttons: OK, Cancel

Copy Quote

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



The 'Copy Quote' dialog box is shown over a table. The table has columns: Customer Name, PO Number, Job Num/TB, and a final column with 'Tr' and '5'. The row for 'MOUSE, MICKY' is selected.

Copy Quote

Copy Quote ES800005

Quote Type

- ☒ Create to a New Quote
- ☐ Create a Related Quote

Buttons: OK, Cancel

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

Copy Quote

Quote # F8

Sales Rep #1

Sales Rep #2

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

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

Quote Lines for ES800006

Line #	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 - / ANTIQUE IVORY		12.00	166.67	SY	28.11	0.00	4,685.09	None
0002	1	03-CARPET PAD	*UnRef*	KARASTEP RELAX - PAD 88 716		-----	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 WRAP		-----	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	1	04-WOOD	*UnRef*	AMERICAN HERITAGE - EN CANYON BROWN HICKOR		-----	28.25	SF	49.68	0.00	1,242.00	None

Number of Lines: 8 Lines Tagged: 8

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

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

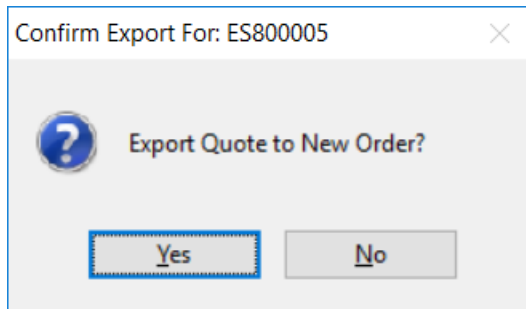
Customer Quotes

Search

☒ RFMS Smart Search ☐ Estimate Number ☐ Customer Name

Store	Quote #	Export Date	Export Status	Quote Type	Primary	Customer Name	PO Number	Job Num/TB
1	ES800005			Original		MOUSE, MICKY		

Confirm the Export to a New Order by selecting Yes.



Verify the tagged lines you would like export to Customer Orders and select the Finger Icon to export lines

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 -	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 WRAP		-----	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

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 # F8

Sales Rep #1

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.

The screenshot shows a software interface with a search bar containing 'GEORGE'. Below the search bar are four radio buttons: 'RFMS Smart Search' (selected), 'Invoice Number', 'Customer Name', and 'Telephone 1'. Below these is a table with the following columns: Store, Order No, Delivered, Customer Name, PO Number, Type, UD JOB #, Work, Cell, and Ship-To Name. The table lists various orders, with the last row highlighted in blue.

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 & SHI
	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				NEWMAN, GEORGE
**	CG104748	12/09/11	GEORGE, ELOISE		Original Order	1701 CO RD 59	205-372-4165	205-000-0000	GEORGE, ELOISE

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.

The screenshot shows the same software interface with the search bar now containing 'GEORGE 59 205'. The table below shows a much smaller number of results, with the last row highlighted in blue.

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
	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	205-75

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

RFMS Order Entry for OWNER'S CONFERENCE 2017

File Edit Reports Utilities Window Help Mail Web Orders Dashboard Navigator

Customer Orders

Search % RFMS Smart S

Store	Order No	Delivered	Customer
1	010101	\$ 10	HEAL
1	CG700001	\$ 10	CRES
1	CG700002	\$	PATTE
1	CG700003	\$	DEPT
1	CG700004	\$ 10	KILGO
1	CG700005	\$ 10 04/16/18	R&R
1	CG700006	\$	JACK
1	CG700007	\$	JKT C
1	CG700008	\$	KILGO

- 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.

RFMS Order Entry for OWNER'S CONFERENCE 2017

File Edit Reports Utilities Window Help Mail Web Orders Dashboard Navigator

Customer Order - CG800009

Original Order

Order # CG800009 Store FB Order Date 04/25/18 Job #1 555-111-2222 Customer # 754

Sold To: MOUSE, MICKY 55 NORTH DISNEY WAY DISNEY PRODUCTIONS, CA 91521 County: LOS ANGELES

Ship To: MOUSE, MICKY 55 NORTH DISNEY WAY DISNEY PRODUCTIONS, CA 91521 County: LOS ANGELES

Sales Rep #1 KERRI IRELAND 100.00% Tax Status Taxable

Sales Rep #2 0.00% PO Number Status ** No Status Specified **

Time Slot -None-

Job Num/TB Customer Type RETAIL

Occupied No

Requested Install Store 1

Line #	Style	Product Code	Roll/Item Number	Color/Description	Status	Group
01	KS	ABSOLUTE ELEGANT ANTIQUE	IVORY			
03	KS	KARASTEP RELAX	716			
55	5312	MULTI FAMILY REG				
55	3879	MULTI FAMILY FLO				
55	1061	MULTI FAMILY STA				
55	6241	MULTI FAMILY FUL				
74	8138	TAKE UP/HAUL				

Line Group: CARPET

Material 7,433.10

Services 1,282.90

Misc. Charges 0.00

Sales Tax 0.00

Misc. Tax 0.00

Order Total \$8,716.00

Balance Due \$8,716.00

Grand Total \$8,716.00

Adjust Total 40.70

Insert Change Delete Notes Adj Status Split Combine Move Template

Export Area Attach PO View PO Ship To Job

Main Info Additional Info

Schedule Pro Attachments AO / CM Providers Receipts Payment Notes Express Save Cancel

17.99.5.21310 United States, Square Yards \RFMS\local - owners conference

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

Customer Payment

Customer: MOUSE, MICKY
Invoice: CG800008
Store: 1 - OWNERS CONFERENCE

Due: 12,805.69
Payment: 0.00
Balance: 12,805.69

1 Payment Date: 04/25/18 F8
2 Reference:
Expiration:
3 Register: 001 - CASH & CHECKS (Store: " ")
Merchant Code: RIFY *** Default Merchant ***
Voice Authorization:
Approval Code:
4 Check: 0.00 E D Total Paid: \$0.00
Cgsh: 0.00 E D
Card: 0.00 E D Tendered: 0.00
Discount: 0.00 E D Change Due: 0.00
Discount Account: 4900 F8 DISCOUNTS TO CUSTOMERS
5 Comments:
Clear OK 6 Cancel

- 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

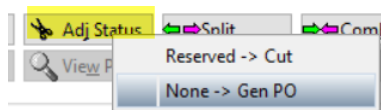
A screenshot of a software form for a single line item. The form contains the following fields and values:

Line Number	0001
Product Code	01 CARPET
Roll Number	
Style	ABSOLUTE ELEGANCE II - ABAC
Color	ANTIQUE IVORY
Id #	
Unit	SY
Width	12.00
Bill Length	125.00
Bill Quantity	166.67
Bill Price	28.11
Total	4,685.09
Status	Gen PO
Group	None

The 'Status' field is highlighted in blue, and the 'Group' field is also highlighted in blue. The 'Group' field has a dropdown menu with 'None' and 'Gen PO' options.

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

Select "None" -> "Gen PO" Lines for CG800009

Line #	Group	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 -	ANTIQUE IVORY	12.00	166.67	SY	28.11	0.00	4,685.09	None
0002	1	03	CARPET PAD		"UnRef"	KARASTEP RELAX - PAD B	716	6'	166.67	SY	9.04	0.00	1,506.01	None
0003	1	05	CARPET INSTALL		"UnRef"	MULTI FAMILY REGULAR C		12.00	166.67	SY	4.42	0.00	736.50	None
0004	1	05	CARPET INSTALL		"UnRef"	MULTI FAMILY FLOOR PRE		3.00	EA		32.08	0.00	96.24	None
0005	1	05	CARPET INSTALL		"UnRef"	MULTI FAMILY STAIRS BO		15.00	EA		2.13	0.00	31.89	None
0006	1	05	CARPET INSTALL		"UnRef"	MULTI FAMILY FULL WRA		15.00	EA		6.46	0.00	96.90	None
0007	1	06	REMOVALS - DEMO		"UnRef"	TAKE UP/HAUL		166.67	SY		1.93	0.00	321.35	None
0008		04	WOOD		"Pricing"	AMERICAN HERITAGE -	CANYON BROWN HICKOR	6'	28.25	SF	49.68	0.00	1,242.00	Gen PO

Number of Lines: 8
Line Group: CARPET
Total: \$7,474.00
Lines Tagged: 2

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 ELEGANCE	ANTIQUE IVORY	12.00	125.00	166.67	SY	28.11	4,685.09	Gen PO	0001		r
1	03	KS	KARASTEP RELAX -	716	6'	37"	166.67	SY	9.04	1,506.01	Gen PO	0002		r

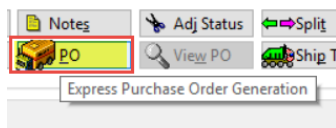
Creating a Purchase Order directly from Customer Orders

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 ELEGANCE	ANTIQUE IVORY	12.00	125.00	166.67	SY	28.11	4,685.09	Gen PO	0001		r
1	03	KS	KARASTEP RELAX -	716	6'	37"	166.67	SY	9.04	1,506.01	Gen PO	0002		r

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 **PO Gen Info 2**

Use as Sidemark
☐ Sold to Name ☐ Invoice #
☐ Ship to Name ☐ Telephone #1
☒ Ship to Address ☐ Customer PO#
☐ Job I.D.

Line Notes
☒ Transfer Line Notes to Purchase Order
☒ Transfer Line Notes to Inventory

Ship To
☒ Import Ship-To from Customer Order
☒ Use Default Selection Method
☐ Import from Order Line
☐ Import from Store Ship To
☐ Import from Customer Ship To
 * See RFMS Inventory to select default setting

Builder Information
 Builder:
 Subdivision:
 Block: Lot:

Printing
☒ Print Purchase Order
 Type: Standard Purchase Order
☒ Preview Purchase Order
 Printer: HP Officejet 6700
☐ Print Private Style ☒ Print Roll # ☐ Print Req. Dye Lot
☐ Print Private Color ☒ Print Salesrep ☐ Print SKU #
☒ Print Store Codes ☒ Print Est Del Date ☐ Print Manf SKU #
☒ Print Notes ☒ Print Unit Cost ☐ Print Builder Info.
☒ Print Ref # ☐ Print Line Total ☐ Print Id #
☒ Print Bar Code ☐ Print Order Total ☐ Print PO Cuts
 Standard Message
☐ Print Message #1 ☐ Print Message #3
☐ Print Message #2 ☐ Print Message #4

Email Options
☐ Email PDF
☐ Use Supplier Email
 PDF File Name: CG8000090001

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#

Purchase Order Generation

PO Gen Info 1 **PO Gen Info 2**

Supplier: MOHAWK FACTORING
 Supplier Phone:
 Acct # w/Supp:

Supp Style: ABSOLUTE ELEGANCE II - ABAC - WELDL
 Supp Style #: 2N35
 Supp Color: ANTIQUE IVORY
 Supp Color #: 502

Priv Style: ABSOLUTE ELEGANCE II - ABAC - WELDL
 Priv Style #: 2N35
 Priv Color: ANTIQUE IVORY
 Priv Color #: 502

Roll/Cut: Cut Std. Roll Length: 130.00
 SKU:

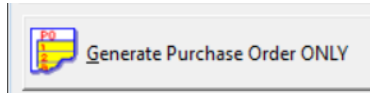
Width: 12.00
 Length: 125.00 F8
 Quantity: 166.67 SY
 Quoted Cost: \$14.0600 F8
 Order Total: \$2,343.38

☒ Footage Order
☐ Roll Order
 Min Len: 0.00
 Max Len: 0.00
 Roll Qty: 0
☒ Same Dye Lot

Ordered By: KERRI IRELAND
 Taken By: JIM SMITH
 Req Ship Date: F8 Ship To
 Promise Date: 04/29/18 F8
 Req Del Date: F8
 Comments: SHIP VIA MOHAWK TRUCK
 Reference #: 587952
 Dye Lot:

Generate Purchase Order ONLY
 Generate Purchase Order and Send PO Electronically
 Generate Purchase Order AND Receive Goods

Once details are entered on the Purchase Order Click the option to Generate Purchase Order ONLY

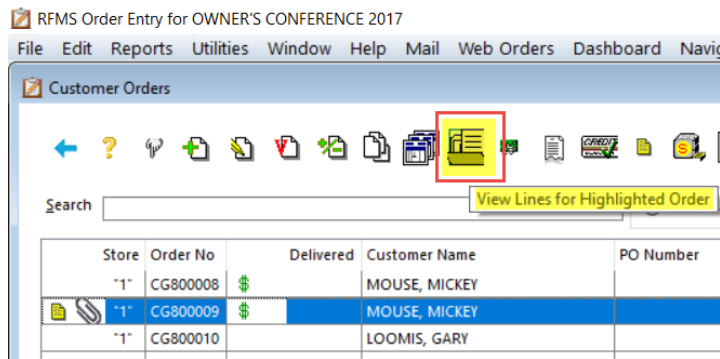


Lines are in an On-Order status with promise date

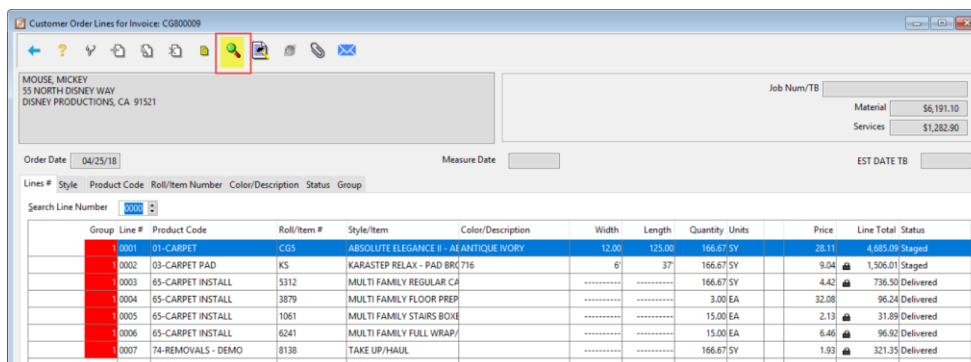
Roll/Item #	Style / Item Name	Color / Description	Width	Length	Quantity	Units	Price	Total	Status	Line #
CG8000090001	ABSOLUTE ELEGANT	ANTIQUE IVORY	12.00	125.00	166.67	SY	28.11	4,685.05	On Order 04/29/18	0001

Are my materials here?

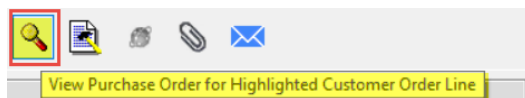
You can view your order and the line status from View Lines Icon in the tool bar.
Search and Highlight the Order and click on view lines



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

Purchase Order for Order CG800009, Line Number: 0001

PO Line #	CG800009-0001	Width	12.00	<input type="radio"/> Footage Order
Order Date	04/25/18	Length	125.00	<input type="radio"/> Roll Order
Store Code	T*	Roll/Cut	Cut	Roll Min: 0.00
Product Code	01 CARET	Quoted Price	14.06	Roll Max: 0.00
Manufacturer	*****	Amnt Ordered	166.67 SY	Roll Qty: 0
Supplier	*****	Amnt Received	166.67	<input type="checkbox"/> Same Dye Lot
Private Supplier	MOHAWK FACTORING LLC	Ordered By	KERRI IRELAND	
Private Style	ABSOLUTE ELEGANCE II	Taken By	JIM SMITH	
Private Color	ANTIQUE IVORY	Req Ship Date		
Style	ABSOLUTE ELEGANCE II	Promise Date	04/29/18	
Color	ANTIQUE IVORY	Reserve #		
Units	SY	Times Printed	1	
Roll #	C65	Status	Satisfied	
Style #	2N35	Total Value	2343.38	
Priv Style #	2N35	Sidemark	55 NORTH DISNEY WAY	
Color #	502	Comments	SHIP VIA MOHAWK TRUCK	
Priv Color #	502	Reference #	646790	
Dye Lot		Sales Rep #1	KERRI IRELAND	
Date Received	04/25/18	Sales Rep #2		
AP Inv Number	CP 800008			
Supp Phone #		Supp Account #		

Notes Print PO Exit

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

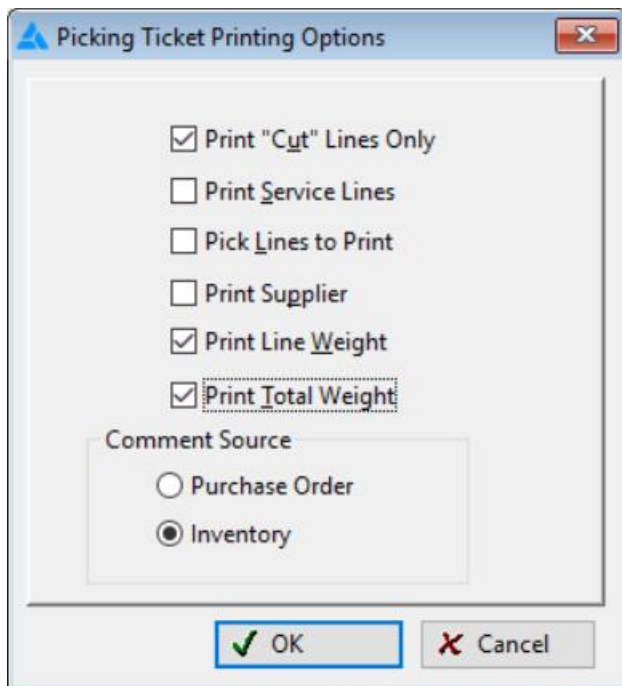
- None
- Header: prints the estimated delivery date for the header only.
- Lines: prints the estimated delivery date for the lines only.
- Both: prints the estimated delivery date for both.

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



The image shows a Windows-style dialog box titled "Picking Ticket Printing Options". It contains several checkboxes and a section for "Comment Source". The checkboxes are: "Print 'Cut' Lines Only" (checked), "Print Service Lines" (unchecked), "Pick Lines to Print" (unchecked), "Print Supplier" (unchecked), "Print Line Weight" (checked), and "Print Total Weight" (checked). The "Print Total Weight" checkbox is highlighted with a dashed border. Below these is a "Comment Source" section with two radio buttons: "Purchase Order" (unchecked) and "Inventory" (checked). At the bottom are "OK" and "Cancel" buttons. The "OK" button has a green checkmark icon, and the "Cancel" button has a red X icon.

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

Page 1
04/25/18
11:18PM

Picking Ticket
OWNER'S CONFERENCE 2017

Invoice:
CG800009

Pick Date:
04/25/18

Sold To

MOUSE, MICKY
55 NORTH DISNEY WAY
DISNEY PRODUCTIONS, CA 91521

Ship To

MOUSE, MICKY
55 NORTH DISNEY WAY
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										
*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

Browse Work Order Lines for Invoice: CG800009

1 2 3 4 5

Area	Style	Color	Width	Length	Quantity	PC	Inventory #	Rate	Total	Work Order Line #	Order Line Line #	Line Status	Cut Date
	ABSOLUTE ELEGANCE II - ABAC - WELDLOK - 12FT 00IN	ANTIQUE IVORY	12	125.00	166.67	01	CG5			0001	0001	Staged	04/25/18
	KARASTEP RELAX - PAD BROADLOOM - 06FT 00IN	716	6'	37'	166.67	03	KS			0002	0002	Staged	04/25/18
	MULTI FAMILY REGULAR CARPET INSTALL		-----	-----	166.67	65	5312	2.570	\$428.34	0003	0003	Delivered	04/25/18
	MULTI FAMILY FLOOR PREP		-----	-----	3.00	65	3879	15.050	\$45.15	0004	0004	Delivered	04/25/18
	MULTI FAMILY STAIRS BOXED WATERFALL		-----	-----	15.00	65	1061	1.250	\$18.75	0005	0005	Delivered	04/25/18
	MULTI FAMILY FULL WRAP/PIE STEPS		-----	-----	15.00	65	6241	2.670	\$40.05	0006	0006	Delivered	04/25/18
	TAKE UP/HAUL		-----	-----	166.67	74	8138	0.600	\$100.00	0007	0007	Delivered	04/25/18

Number of Lines: 7 Lines Tagged: 7

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

Confirm Work Order Printing

Work Order

Work Order to Print: DEFAULT RFMS WORK ORDER

Print Order

☒ Area

☐ Customer Order Line Number

☐ Product Code / Style / Color / Inventory #

☒ Print Work Order Line Notes

☐ Print Balance Due

☒ Print Rate

☒ Print Labor

☒ Print Sales Representative(s)

☐ Encrypt Labor

☐ Letterhead

☐ Print Shipping Instructions

☐ Print Color Number

☐ Print SKU

☐ Print Order's Custom Note

Copies: 1

☐ Email Work Order

☐ Post to Batch

☒ Save to PDF History

☒ Preview Work Order

Destination: HP Officejet 6700

Standard Custom Print Cancel

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

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: MICKEY FB

Last Name: MOUSE

MOUSE, MICKEY

Start Date: 01/01/80 FB

End Date: 12/31/79 FB

☐ Print Add'l Info

Sub Sort

- ☒ Invoice #
- ☐ Bill Date
- ☐ Order Date

Stores

☒ All ☐ Single FB

Salesperson: FB

Customer	Invoice	Order Date	Bill Date	Total Charges	Total Credits	Balance	Days
----------	---------	------------	-----------	---------------	---------------	---------	------

OK Exit

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: MICKEY FB

Last Name: MOUSE

MOUSE, MICKEY

Start Date: 01/01/80 FB

End Date: 12/31/79 FB

☐ Print Add'l Info

Sub Sort

- ☒ Invoice #
- ☐ Bill Date
- ☐ Order Date

Stores

☒ All ☐ Single FB

Salesperson: FB

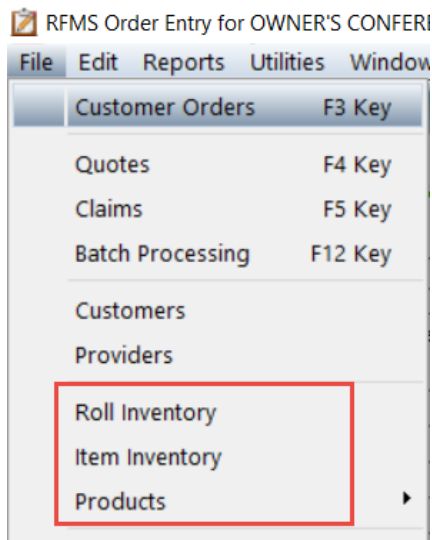
MOUSE, MICKEY Phone 1: 555-111-2222 / Activity: Del. w/Balance and Undelivered

Customer	Invoice	Order Date	Bill Date	Total Charges	Total Credits	Balance	Day
MOUSE, MICKEY	CG800001	04/17/18		2,584.17	0.00	2,584.17	
MOUSE, MICKEY	CG800003	04/17/18		249.05	0.00	249.05	
MOUSE, MICKEY	CG800008	04/25/18		163.89	0.00	163.89	
MOUSE, MICKEY	CG800009	04/25/18		7,474.00	0.00	7,474.00	
MOUSE, MICKEY Totals				10,471.11	0.00	10,471.11	
MOUSE, MICKY	CG800002	04/17/18	04/17/18	185.76	0.00	185.76	

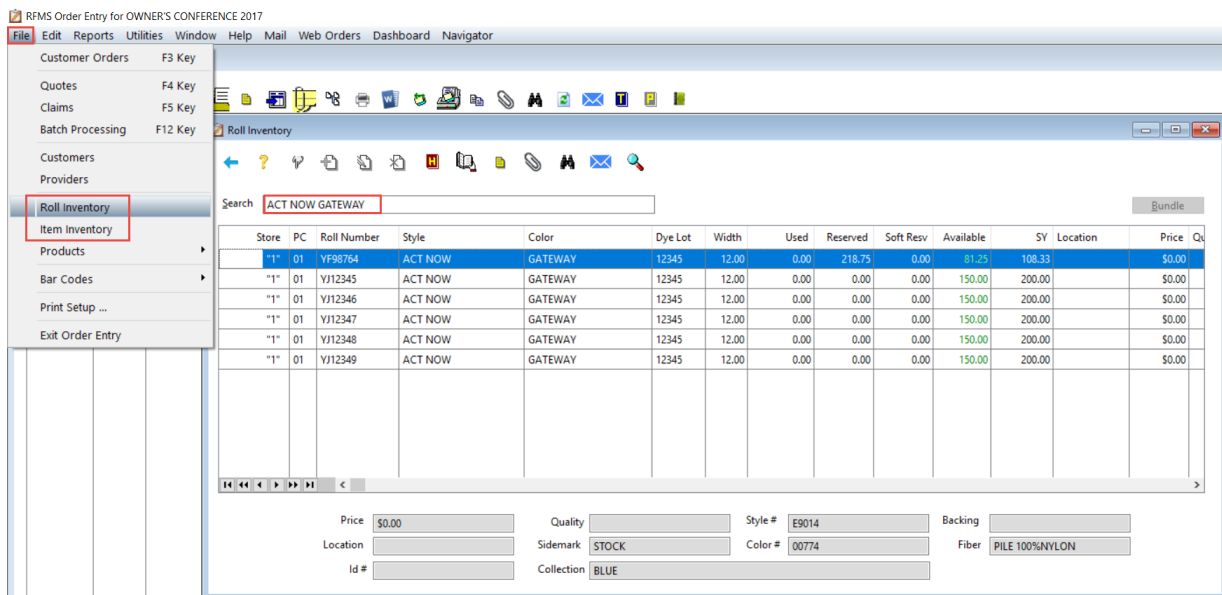
Reset Go To View Order Lines Receipts Job Cost Exit

Order Entry File Menu

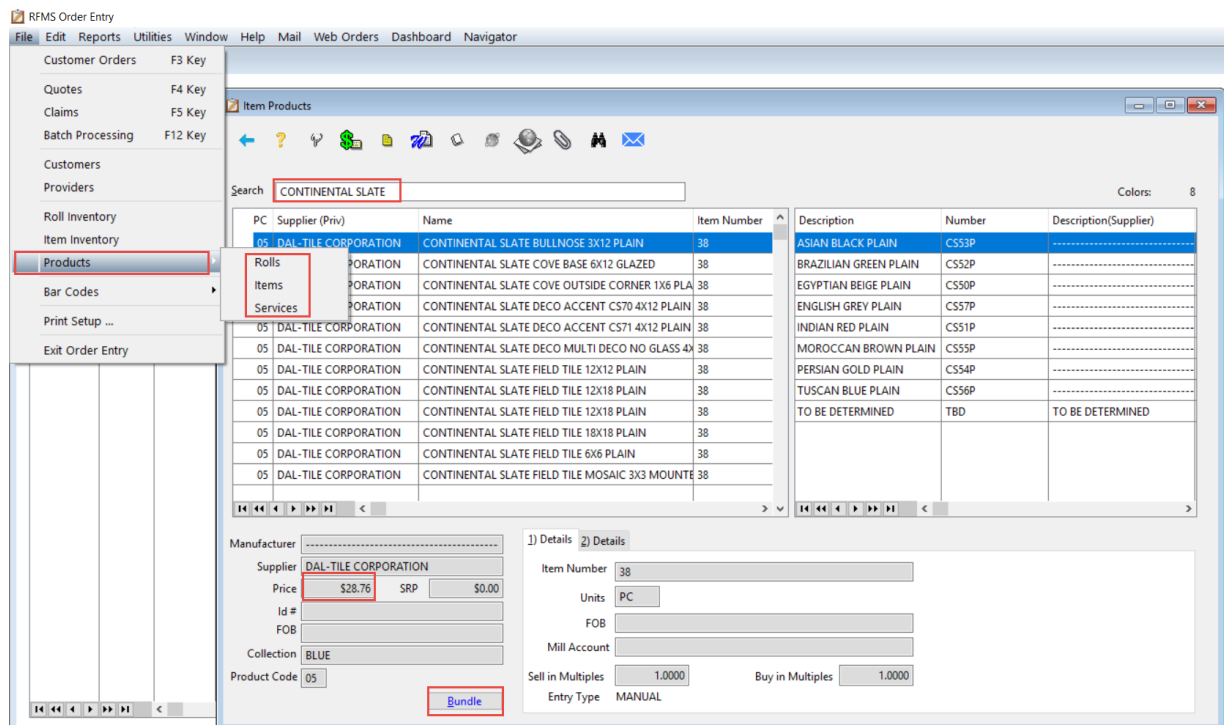
From Order Entry File Menu. You can access information from Inventory and Products module. This information is for viewing only and no editing can be done from these screens.



From File-Roll or Item Inventory you can search the warehouse for physical inventory



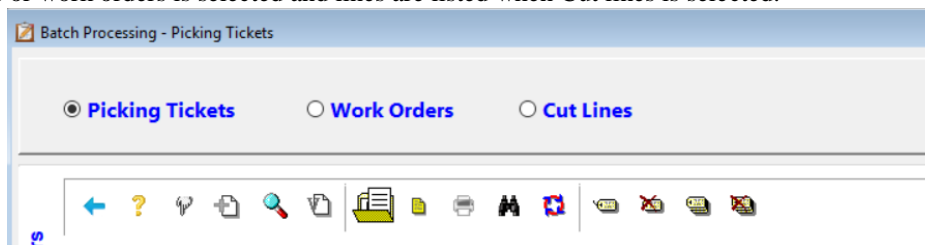
From File-Products you can search the Product Catalog for Product details and pricing



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 are 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