



# ADD-ON MODULES

PRESENTED BY:

JENNIFER KING

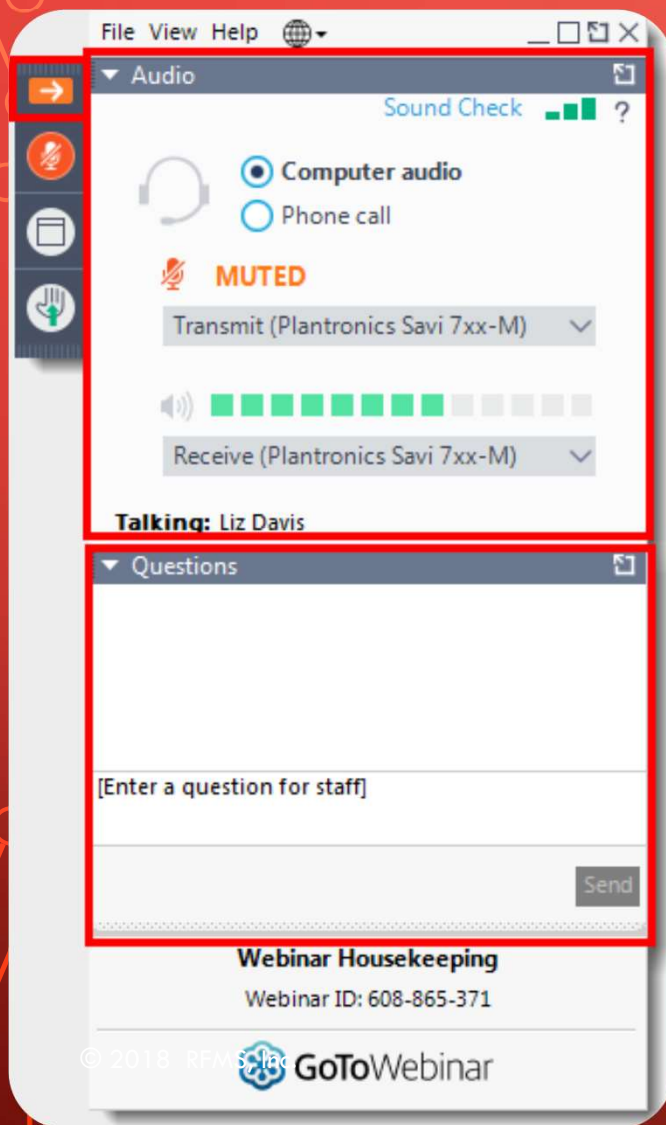
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800-701-7367 X 3315



The webinar will begin shortly... Thank you for attending!

# How to Participate in today's Webinar



Open and close your control panel by clicking the orange arrow.

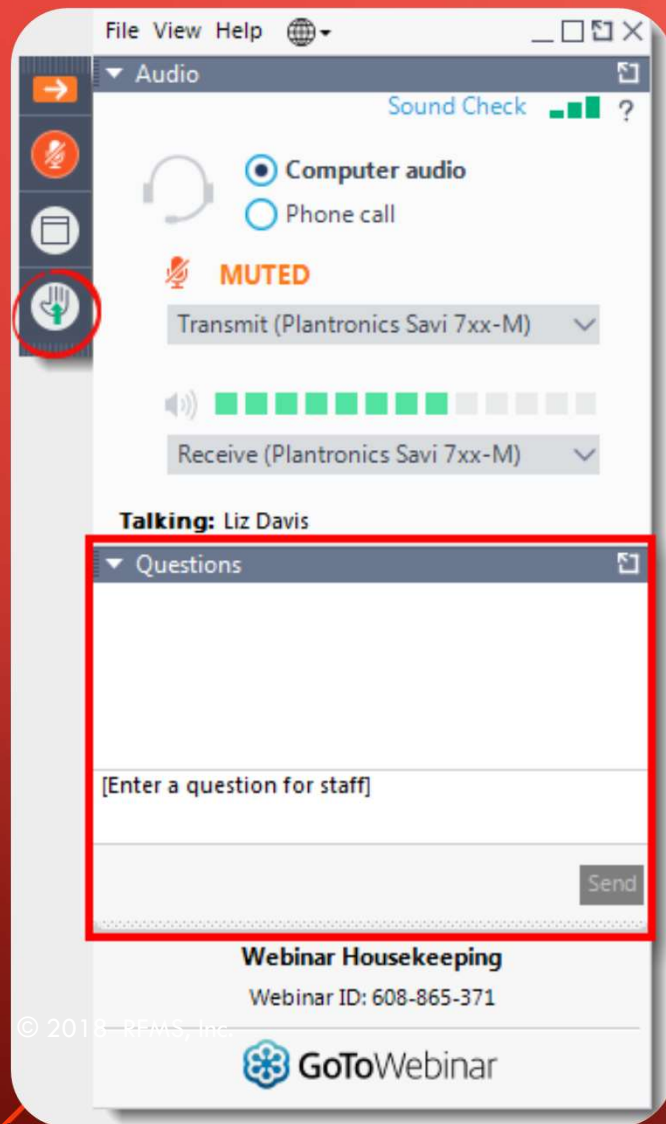
Join audio:

- Choose **Computer** and then select your **Mic & Speakers** to use VoIP
- Choose **Telephone** and dial in using the information provided

**Note:** Today's presentation is being recorded and will be provided within 48 hours. It will also be posted on our Support Website under Videos & Webinars. Links included in your handout.

# Time for Questions!

## (Use hands for unmuting!)



- Please use the Questions panel to submit your text questions and comments during the presentation. We have panelists on the call who will answer your questions.
- At the end of the presentation, if time permits, we will open the webinar for verbal questions. At this time, please raise your hand to be unmuted.



# PRODUCTIVITY TOOLS MEAN LESS WORK, MORE PROFIT

Integration and industry specific applications are the heart of RFMS. Every flooring dealer has specific and unique needs when it comes to the processes that are used in their daily business flow. We realize that one size does not fit all when it comes to software. That's why we offer many add-on modules and products that allow you to select certain programs "a-la-carte" to suit both your business and financial needs.

# MOST POPULAR



# ADDITIONAL PROGRAMS

- Product Import/Export (PIE)
- Hyperpay
- Direct Deposit
- Store Specific Products
- Color Cross Over
- Contract Pricing
- Provider Matrix
- Certified Payroll
- Batch Job Costing
- Batch Inventory Allocation
- ERRM
- NHMS
- Inventory Barcoding
- Mobile Applications



# MEASURE

*Be Accurate. Be Efficient. Be Profitable.*

## COMMERCIAL FLOORING CONTRACTORS

- **Quickly calculate** even the biggest commercial takeoffs.
- **Increase profits** with more efficient and accurate estimates.
- **Minimize waste** by optimally placing carpet seams and cuts.
- **Precisely control** all details of complex commercial projects.

## RETAIL FLOORING DEALERS

- **Increase sales** by immediately showing customers accurate estimates.
- **Deliver service** your competitors cannot match.
- **Complete in-home sales and estimates** using your notebook or tablet PC.
- **Prevent costly estimating mistakes** by capturing every detail of the sale.

## HOME BUILDERS

- **Estimate flooring for custom, tract, or multi-family homes**
- **Precisely control profit margins**
- **Work faster** using powerful drawing tools and templates.
- **Achieve less waste** by controlling cut and seam placement.

## TILE ESTIMATORS

- **Use built-in tile patterns** to quickly create complex designs.
- **Define custom tile shapes and sizes.**
- **Create 3D visualizations** to show exactly how the finished project will look.

[More...](#)

# E-COMMERCE

- *The elimination of manual data entry to maintain your product catalogs, process and fax purchase orders and enter supplier invoices saves your business time and money. Quick identification of discrepancies between purchase orders, invoices and receivers is done automatically. It's unbelievable the time you will save because all the data is integrated to the rest of the RFMS system, including A/P, Products and Purchase Orders.*
- *Accuracy of product catalog information provides your staff with reliable pricing for quotes and estimates*
- *Cut administrative transaction costs, increase accuracy and boost customer service*

# CLIENT MANAGEMENT MODULE (CMM)

- Manage your showroom floor, sales leads, customers, projects and contacts
- CMM is comprised of three distinct areas to enable you to transform your business
  - Sales Floor Manager (UPS) – keep up with your showroom traffic
  - Retail Sales Manager – track contacts, prospects or customers as they relate to your sales and advertising
  - Commercial Project Management – manage and track everything about your multiple-phase jobs
- Automate your communication and scheduling by using the built in calendar and email capabilities.

# BID PRO

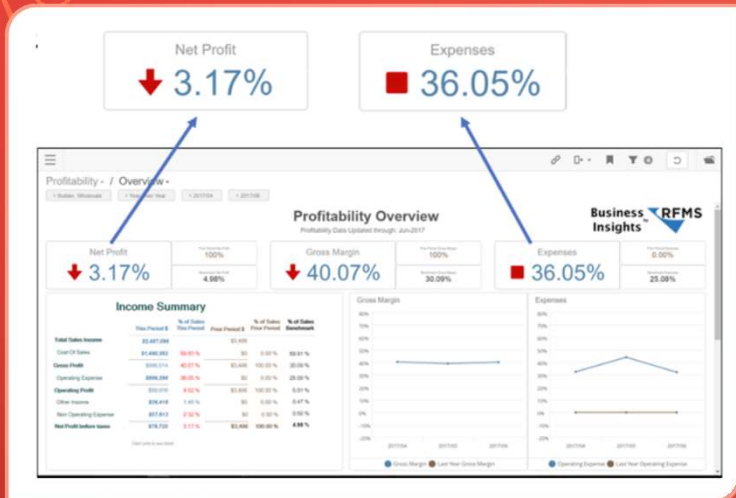
- Streamline your bidding process to win more bids and improve profitability
- Easily & Quickly re-calculate bids to accommodate add-ons and change orders
- Great for all job types!
  - Builder Projects
    - Accommodates allowances and can create overage orders for upgrades
  - Commercial Projects
    - Allows profit margins to be applied to the whole project or line by line
  - Multi-Family Projects
    - Create Templates for floor plans with options and export selections to create a custom bid quickly

# SCHEDULE PRO

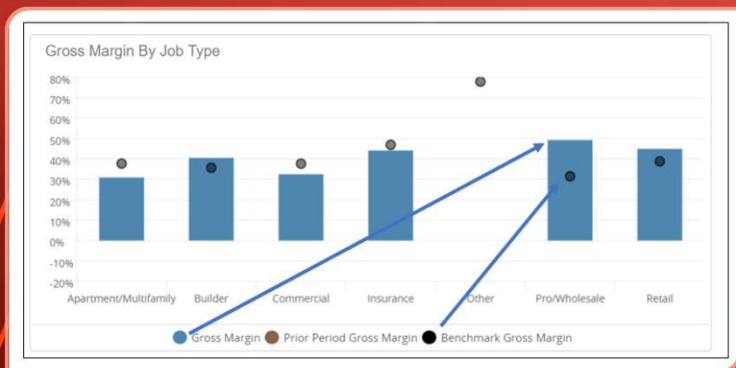
Crew Name	Monday 09/10/18	Tuesday 09/11/18	Wednesday 09/12/18	Thursday 09/13/18	Friday 09/14/18
BARRY GRAY		●	●	●	●
BRUNO GOODMAN	▲ CG700001 CRESCENT CREATIONS 987 MOON WALK WAY	●	●	▲ CG700003 555 PRESIDENTS WAY 9569761032 DEPT OF REVENUE/GA 555 PRESIDENTS WAY	●
CLARK PERRY		●	●	●	●
ELVIS BUCHANAN		●	▲ CG700029 VANDALAY INDUSTRIES 50023 SODALES. RD.	●	●
FERDINAND SHEPHERD		●	●	●	▲ CG700008 17 STATELY PLACE KILGORE REALTY 8789 JAZZY BLVD
GARY ALVAREZ		●	▲ CG700002 PATTERSON REAL ESTATE CO 8558 PATTY WAY	●	▲ CG700007 100 TRAVEL BLVD JKT CONSTRUCTION 7177 BROADVIEW WAY
GRAHAM TILLMAN		●	●	●	●

- Quickly schedule and track jobs & crews
- Make your job schedule available across your network for easy access or viewing by your entire staff if desired
- Links with the RFMS Order Entry module with automatic alerts
- Streamlines the scheduling process and reduces conflicts with overlap and crew availability
- Capacity & Crew Management

# BUSINESS INSIGHTS



- Key Performance Indicators, Business Intelligence & Benchmarking for the Flooring Dealer
- You'll have access to information about your business visualized like never before. You'll see your key performance indicators along with comparative reports to point out opportunity and indicate trouble spots. You also have industry benchmarking indicators to see how you're performing compared to others.



# NEW HOME MANAGEMENT SYSTEMS

## NHMS

- A product developed for flooring contractors in the builder market, NHMS makes subdivision bidding and pricing easy and creates point-and-click design center selections and pricing. NHMS pulls products and labor rates from RFMS Products module and imports takeoffs from RFMS Measure. After the design center selections are made, exact material quantities based on home buyer selections are pulled from RFMS Measure and an order is generated.
- Key Features of NHMS:
  - Point and click design center pricing and product selections
  - Create bids for subdivisions in minutes
  - Create color floor plans
  - Eliminate multiple data entry points

# INVENTORY BARCODING



- Hardware that works with the Inventory Barcoding software module that is integrated with RFMS Inventory and works with a hand-held laser tricoder to speed up the time it takes to do physical inventories. Uploads into RFMS Inventory for quick and accurate reconciliation.
- Inventory barcoding provides the ability to take a physical inventory with a hand held terminal, and then to transfer that inventory information to the RFMS Inventory module for reconciliation.
- Barcoding is convenient, more accurate, and reduces the time required for the taking of physical inventories.

# PRODUCT IMPORT/EXPORT

- Product Import/Export (PIE) is a tool to import and export products into/out of the RFMS Product File. This tool uses a single spreadsheet for Rolls, Items, and Services.
- PIE is the method used for importing product catalogs for vendors who do not participate in B2B.
- This program is free with the purchase of 2 hours of training to learn how to use it.

# STORE SPECIFIC PRODUCTS

- Store Specific Products is an add-on program that allows a flooring dealer using the RFMS Products module to sell the same products at different price points in a multi-store configuration. Greater control over selling prices can mean greater profits.
- **Store Specific Products is designed to allow:**
  - Tight control over selling prices at the Order Entry level
  - Differentiated pricing formulas for each store code
  - Printing of price lists by store
  - Entering price changes for all locations fast and efficiently
  - Setting new prices for all products or modify only certain product prices

# COLOR CROSS OVER

- The Color Crossover feature gives the ability to link colors from different style name products to others (style name products) that are identical or interchangeable. If colors have been linked together from one style name to another using the color crossover feature, the new color links will be considered by the system as the same product.
- Linking these colors also allows them to populate with the use of Product Driven Order Entry. When choosing a product from the Products file, it will then display all rolls that are in inventory that qualify as this product.
- This coupled with Product Driven Order Entry is a great way to optimize the use of your stock.
  - Product Driven Order Entry controls the usage of current inventory by forcing selection from the Products File only and will then return any matching inventory records that also meet the preset high/low waste factors. This feature is included in your Core system and can be turned on in system options. It can be used with our without Color Cross Over.

# CONTRACT PRICING

- **RFMS Contract Pricing** gives dealers the ability to set contractual prices on specific products for customers and properties. These prices are reflected on new orders, whether the order was created directly or exported from an existing estimate – this means that estimates *do not need to be manually updated* when contract prices change.

# PROVIDER MATRIX & CERTIFIED PAYROLL

- **Provider Matrix**
  - This program allows you to apply & keep track of multiple rates of pay for the same service based on many different criteria. It can be set up as simple or complex as needed for your individual business. The Provider Rate Matrix can be used when creating records from both Order Entry and Schedule Pro.
- **Certified Payroll**
  - This program allows you to classify your workers' Skill Levels, set up Prevailing Wages using Provider Matrix, and print the required Certified Weekly Payroll Report for Federally funded projects.
- These programs are free of charge with the purchase of training.
- The HR & Provider Matrix Webinar can be viewed on our Support Site under the Videos & Webinars tab. There is also a link to this in your handout.

# BATCH JOB COSTING

Batch Job Costing

Delivery Date: Today: 05/14/15

Use Provider's Install Date as 1st option for Del Date

Overhead Margin: 3.75% (Material only)

Discount Rate: 0.00%

Due Date: [F8]

Sort Order: Order Number

Report Destination: hp LaserJet 1320 series UPD PCL 5

Gross Profit Percent: Minimum 0.00% Maximum 0.00%

Labor Profit Percent: Minimum 0.00% Maximum 100.00%

Estimated Delivery Date:  Use Estimated Delivery Date  
Begin: 01/01/80 [F8] End: 12/31/79 [F8]

Customers:  All Customers  
Customer: [F8]

Invoice Date Required  Provider Information Required  
 Include Orders On Hold  Auto Balance Providers  
 Ship-To County Required  Preview Result Report  
 All Lines in a Delivered Status

Job Cost Sheet: Copies: 0  Print to Batch  
Unit to Print: Total Unit Cost  
 Print Commissions  
Destination: hp LaserJet 1320 series UPD PCL 5

Invoice: Invoice to Print: DEFAULT RFMS INVOICE  
 Print Invoice  Print Overages  
 Email PDF  Save to PDE History  
Copies: 1  Post to Batch  
Destination: hp LaserJet 1320 series UPD PCL 5

Store:  
"" - DOCUMENTATION COMPANY  
"1" - MY NEW STORE  
"6" - STORE 6  
"N" -

Customer Type:  
ACCOMMODATIONS  
ARCHITECT & DESIGN  
BASELINE  
BUILDER  
CARPET CLEANER  
CASH & CARRY  
COMMERCIAL  
CUSTOMER TYPE  
DECORATOR  
DESIGNER  
DISTRIBUTION  
EMPLOYEE USE  
FIRE & WATER RE

Sales Representatives:  
ANDREW  
BEN  
BRENDA  
CAROLYN  
DON  
FRED LOVE  
GORDON  
HOUSE  
JANNA  
JEFF THOMPSON  
JEMECHIA  
JOHN G.  
LEWIS  
MARK  
MICHAEL  
MIKE  
NAOMI  
SCOTT

Options Standard Process Cancel

**NOTE: It is NOT RECOMMENDED that you set your printer Destination to a PDF generator**

- This feature allows job costing multiple customer orders simultaneously. Select the appropriate parameters from the fields available and click Process. All Customer Orders that fall under the selected parameters will be processed.
- Criteria for Batch Job Costing:
  - Finds the greatest Date from Providers.
  - Finds the greatest Order Date from Order Header (including Overages).
  - Finds the first day of the month after the last Journal Close.
  - The greatest of these three will be used for Job Costing.
- This program is free with the purchase of 2 hours of training.

# BATCH INVENTORY ALLOCATION

- The Batch Inventory Allocation routine runs automatically when work orders are printed from the Schedule Pro Quick Schedule Module to assign inventory to the orders automatically.
- Inventory is can be assigned using dyelot or not and uses the following rules when allocating:
  - No cuts smaller than 3ft
  - Will not leave a roll with less than 12'9" balance
- Once the routine is completed, a report is printed of jobs the system was not able to allocate. The rules are currently hard-coded and there is no user interface.

# HYPERPAY

- HyperPay is a feature designed for fast distribution of payments from a check(s) for multiple Customer Orders. HyperPay makes it easy to verify totals and avoid posting errors before posting to receipts. "Payment Sets" are entered and saved until the payments are processed. (If HyperPay is closed and re-opened later, the payment sets added will still be there.) Several different payment Sets can be maintained at the same time. Multiple users can operate on different or the same payment set cooperatively.
- HyperPay is a module that is much like the current RFMS Multi-pay interface. The difference is that HyperPay will allow many payment sets going on at once as well as allow multiple users to have access. In addition, payments may need to be applied to more than one customer in any given payment set. HyperPay allows quick posting of several checks from several customers to the corresponding customer orders making posting payments faster and easier than ever.
- This program is free with the purchase of 2 hour of training.

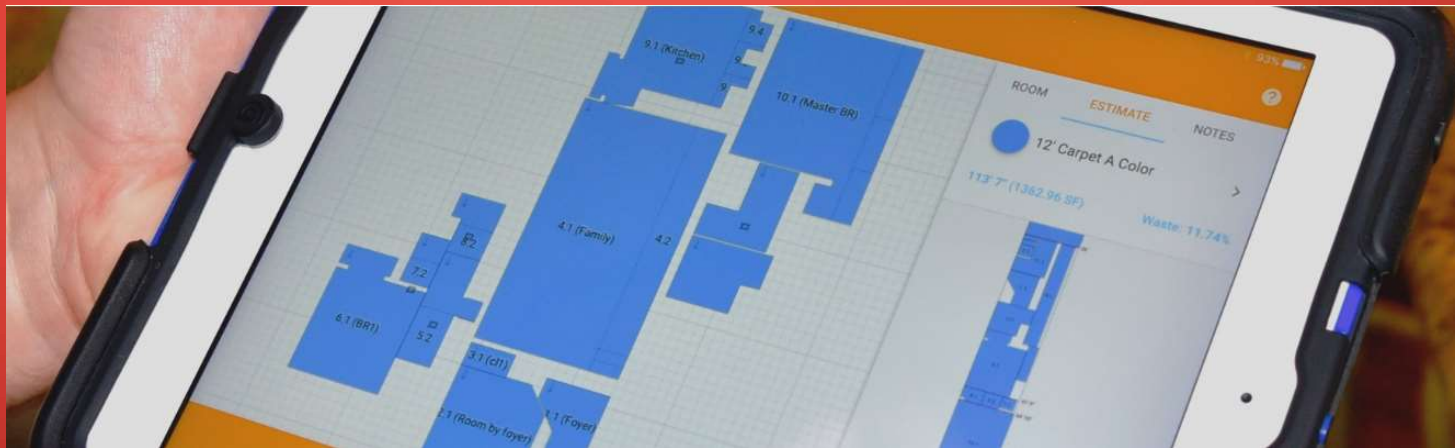
# DIRECT DEPOSIT

- Direct Deposit by RFMS is a software program which allows the depositing of funds into employee and supplier's accounts electronically. Direct Deposit integrates with the RFMS payroll and accounts payables modules, eliminating the need for additional data entry.
- Direct Deposit also eliminates the need for paper checks, thus reducing processing time. The Accounts Payables procedure is called Electronic Funds Transfer (EFT).
- RFMS is only creating the file to send to the bank. It does not do the direct deposit. A program from the bank is required for this. Please sign up with the institution directly.

# ENHANCED REVENUE RECOGNITION MODEL ERRM

- To comply with SOX (Sarbanes-Oxley Act), RFMS developed the Enhanced Revenue Recognition Method or ERRM. ERRM is a feature in RFMS designed to allow journal detail. It utilizes new Standard Account Codes for enhanced journal reporting and real-time General Ledger posting. This feature breaks apart the journal summary reports for A/R, A/P, Customer Deposits, Sales, Cost of Sales and Inventory into a detailed listing that shows when specific transactions are made. This feature provides a more detailed journal listing than what RFMS currently provides particularly in regard to Work In Progress tracking through the journal.
- ERRM is the most comprehensive approach for reflecting real-time financial position in the General Ledger.
- This program is free with at least 4 hours of training for conversions.

# MOBILE APPLICATIONS



Drop the pencil and graph paper, the tape measure and calculator - use one tool that can do it all. Draw, Document, Estimate and Quote - all before you leave the jobsite.

# MEASURE MOBILE

- Measuring, Estimating and Quoting Application
- Attach Photos, Import 3D Clipart
- Works Offline
- Search for RFMS Customers and Products\*
- Export to RFMS to create/update Quotes and Orders or create BidPro Estimates\*

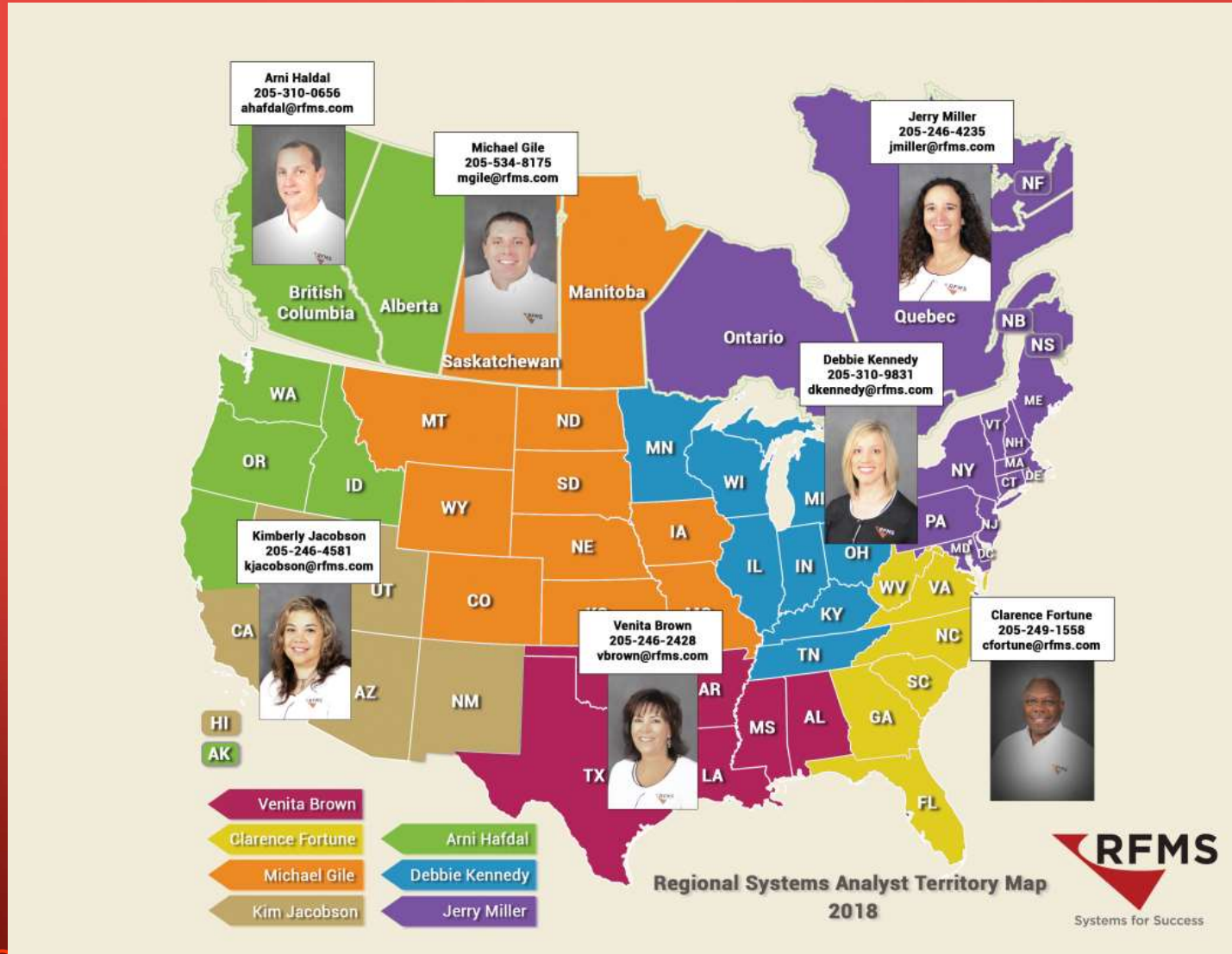
# RFMS MOBILE

- Real-time, mobile access to your RFMS data
- View a dashboard of your recently created quotes and orders
- Create/Edit Quotes and Orders
- Post Payment and collect a signature
- Print, email or share PDF Quote and Invoice documents
- Attach photos and PDF documents to Header or Lines
- Open attachments
- View Customer and Product data
- Point of Sale screen to sell inventory items quickly
- View Scheduled Jobs^

# MOBILE WORK ORDERS

- Restricted access to Work Order/Work Ticket information for Installers
- Ability to read and append notes to the Order
- Collect homeowners signature of approval and attach PDF document to the Order

# REGIONAL SYSTEMS ANALYSTS





# UPCOMING WEBINARS

## RFMS Core Webinars

<i>Date</i>	<i>Time</i>	<i>Description</i>	
Sep 13th, 2018	2:00 pm CDT	RFMS Add-on Modules	<a href="#">REGISTER</a>
Sep 18th, 2018	2:00 pm CDT	RFMS Mobile	<a href="#">REGISTER</a>
Sep 19th, 2018	2:00 pm CDT	New Features in RFMS Version 18	<a href="#">REGISTER</a>
Sep 20th, 2018	2:00 pm CDT	Version 18 Interface Options	<a href="#">REGISTER</a>
Oct 9th, 2018	2:00 pm CDT	Measure Mobile (Standalone)	<a href="#">REGISTER</a>
Oct 11th, 2018	2:00 pm CDT	Balancing Inventory to the General Ledger	<a href="#">REGISTER</a>
Oct 16th, 2018	2:00 pm CDT	RFMS Mobile	<a href="#">REGISTER</a>
Oct 25th, 2018	2:00 pm CDT	Key RFMS Sales Reports	<a href="#">REGISTER</a>

# UPCOMING TRAINING EVENTS

- <https://www.rfms.com/regional-workshops-calendar/>



- Owners Conference April 24-26, 2019

# HOW DO I SCHEDULE TRAINING ON RFMS.COM?

The image shows a screenshot of the RFMS website. At the top, there is a dark navigation bar with links for "My Account", "Support", and a phone number "1-800-701-7367". Below this is a white header with the RFMS logo and the tagline "Systems for Success". A red arrow points to the "TRAINING" link in the main navigation menu. The main content area features a large image of a person using a tablet, with the text "MEAS" and "Create propo" visible. A large red arrow points from the text "Go to these options to schedule classroom, online or onsite training!" to a dark sidebar menu. The sidebar menu lists several training options: "REGIONAL WORKSHOPS CALENDAR", "WORKSHOPS", "LIVE WEBINARS", "FREE PRE-RECORDED WEBINARS", "CLASSROOM TRAINING", "E-LEARNING", "CONSULTING", and "B2B TRAINING". A "GET STARTED" button is also visible at the bottom of the page.

RFMS  
Systems for Success

My Account Support 1-800-701-7367

PRODUCTS INDUSTRIES **TRAINING** NEWS C

REGIONAL WORKSHOPS CALENDAR

WORKSHOPS

LIVE WEBINARS

FREE PRE-RECORDED WEBINARS

CLASSROOM TRAINING

E-LEARNING

CONSULTING

B2B TRAINING

GET STARTED

Go to these options to schedule classroom, online or onsite training!



# ANY QUESTIONS?

PLEASE TYPE YOUR QUESTION IN THE QUESTION BOX OR  
RAISE YOUR HAND TO BE UNMUTED BY THE PRESENTER

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**THANK YOU FOR ATTENDING!**

We look forward to seeing you on a webinar in the future!

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