

# PAPERLESS WORKFLOW

PRESENTED BY:

*Cindy Thompson*

DOCUMENTATION BY:

*Jaime Gauen*

## **OVERVIEW**

A paperless workflow can increase your company's process efficiency and produce cost-savings as a result. RFMS has many built-in features to support a paperless workflow or assist you with improved efficiency and reduced paper use.

Here are just a few of the benefits to going paperless:

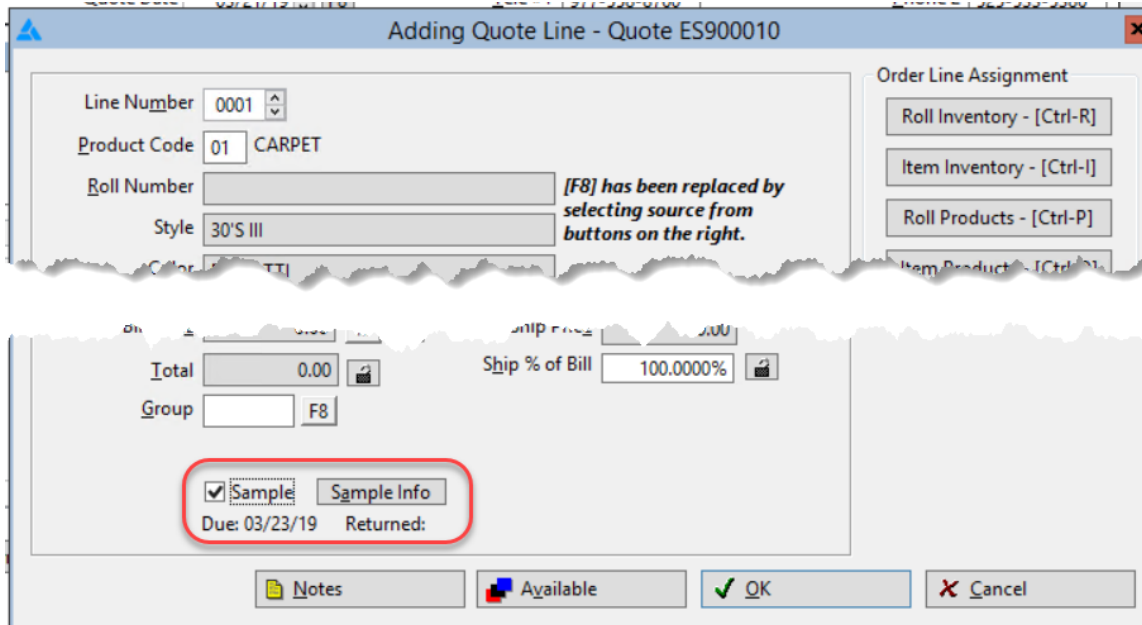
- Reduce business cost associated with paper, printers, copiers, fax machines, ink and toner cartridges
- Eliminate filing cabinets and reduce office space
- Conduct business in a mobile environment resulting in faster responses to customers
- Increase efficiency of your staff by removing the time spent searching for and sending documents
- Present a professional image to your customers with mobile solutions
- Create faster business work flow by eliminating the time wasted on getting paper signatures on contracts and forms
- Secure backup of all documents
- Real time updates and delivery of documents
- Integrated tracking and documentation throughout the order lifecycle
- Environmentally friendly

In this session, we will review some of the areas where you can incorporate paperless solutions into your organization.

# SAMPLE CHECK OUT

## Replaces Sample Sign Out Book or Sheets

Sample sign out books or sheets are often seen at the greeting desk. However, they can be easily eliminated and samples can be tracked in a more meaningful way within RFMS. Samples are entered on a Quote as a line. Then, it's as simple as checking the box to indicate a sample was taken. Barcoding extends the paperless capabilities of Sample Check Out as they can be scanned directly into the quote, as well as returned back to store, via barcode.



With all samples signed out in RFMS, you then have excellent reporting for following up on the samples that are out. Run a Sample Status Report which displays a listing of samples checked out by customers along with contact info. The report can be viewed by store and sales rep and can include both Samples Due and Samples Checked Out. The report can also be created for each sales rep (Page Break on Sales Rep.) to produce a document for the sales rep to follow up with clients who have checked out samples.



Page No: 1  
03/22/19  
02:18PM

OWNER'S CONFERENCE 2019  
SAMPLE STATUS REPORT  
Due  
Sub Sort By: Customer/Style/Color  
\*\*\* denotes that sample is due

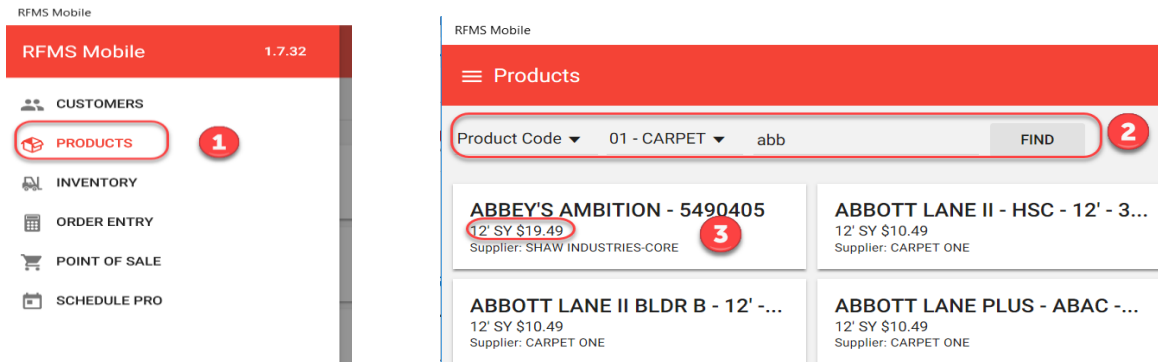
Store: "1"

Quote #	Customer	Style	Color	Out	Due	Returned
Sales Rep: BRIAN FREESE						
* ES700003	ALFORD,DARREL	ABRASH	GLACIER	02/28/19	03/02/19	
Phone: 896-378-3794						
Email: lorem.fringilla.omare@laoreet						
* ES700004 VILLARREAL,RHODA						
		SPUN TILE	CRISP	02/28/19	03/02/19	
Phone: 985-135-4744						
Email: sed.sapien.Nunc@nullaante.com						

## PRICE LOOK UP

### Replaces price books or printed sheets for salespeople

Price look up with RFMS Mobile is so quick and easy that you no longer need the printed price sheets. It also ensures all prices are up to date and accurate. Go to (1) Products, (2) enter product code, enter partial description or color, click find to see the (3) product pricing.



## CLIENT MANAGEMENT

### Replaces job folders and associated printed materials

Client Management Module allows you to electronically manage sales prospects from the initial lead all the way through to job costing, with no job folders needed. Save money on those manila folders and improve organization at the same time! In CMM, communication and scheduling are automated. You can track and manage everything from emails, meetings, files, tasks, alerts, notes, contact history, advertising campaigns and more. There are two CMM platforms from which to choose:

#### Retail Sales Manager

- Contact Relationship Management, which allows the tracking of any type contact, prospect or client.
- Each user can be set to either mode Retail Sales Manager Mode or Sales Floor Manager Mode.
- Includes all the features of Sales Floor Manager plus many others

### Commercial Project Manager

- The Project is any group of data to be tracked together.
- Each user can be set to any of the 3 modes.
- Alert the sales person when purchase orders are generated, and material is received
- View all records together in the Order History screen related to the order including purchase orders, installations scheduled and accounts payable records
- Includes all the features of Retail Sales Manager plus commercial specific reporting and project management.



## **ORDER ATTACHMENTS**

### **Replaces job folders and printouts**

You can attach documents to Quotes, Orders, Inventory, Products, Measures and BidPro Estimates. The attached files can be 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, .pox, .gif, jpg. To add an attachment, you simply click on the "Paperclip" Icon found throughout almost all modules. Attachments can be attached to the entire order or to a specific line.

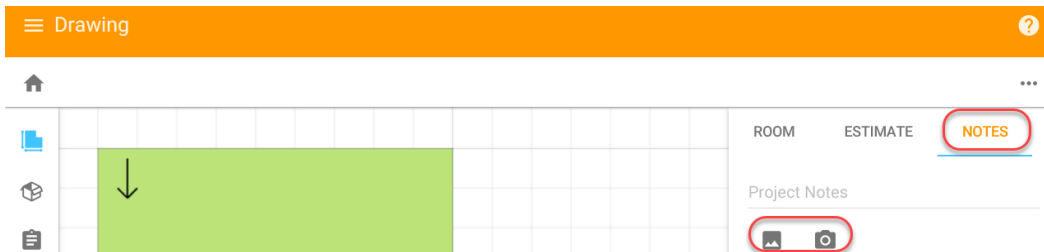


Prior to using attachments, you will need to set a location for where these attachments will be stored. This is done by going to:

*> Utilities>System Options>System Wide>General>Attachment Directory*

It is a good idea to create a folder called "Attachments" or something similar and use that folder for all files. This makes it easier to find files when attaching them to inventory or products records. All users will need to have access to this folder to save or view attachments. This does not have to be in the RFMS directory. If it is not, though, make sure backups include this directory. If the directory is changed, the files from the old directory should be copied to the new directory.

In Measure you can attach a picture or document using the Notes tab on either the project or check list screen.

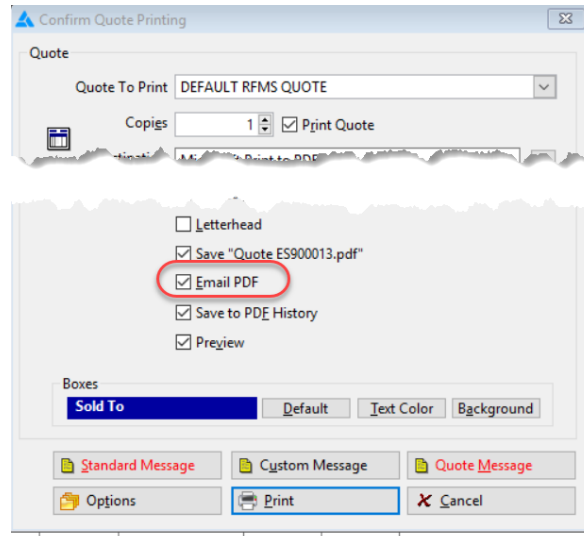


## **SENDING QUOTES AND ORDERS VIA EMAIL**

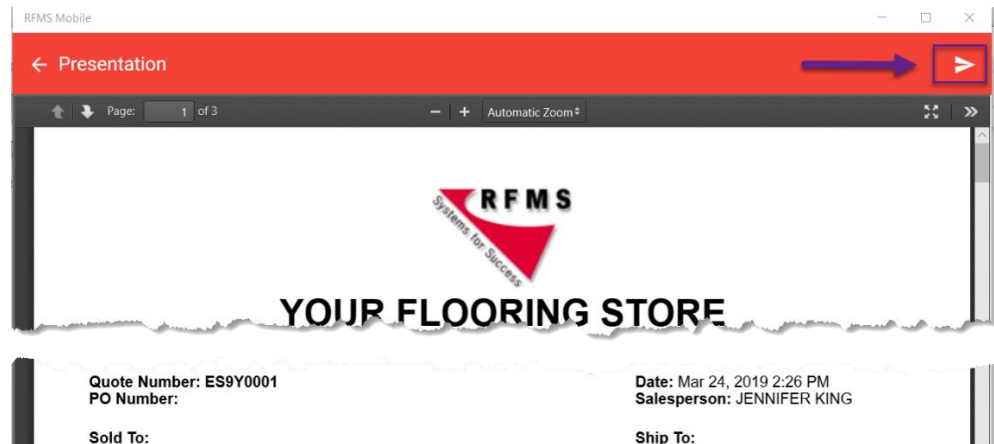
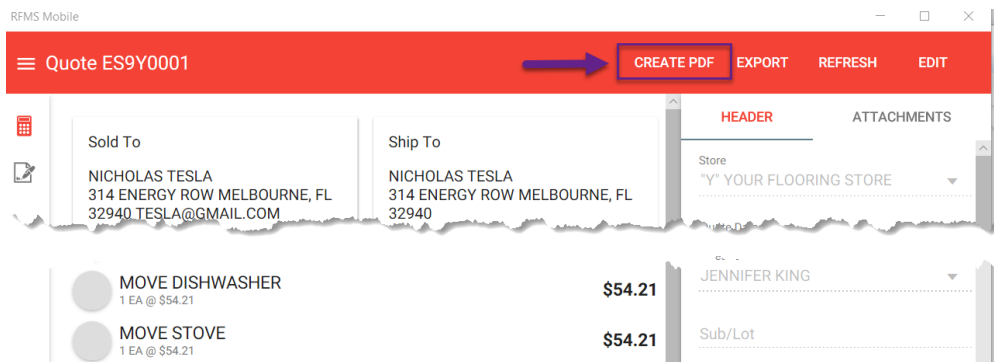
### **Replaces printouts**

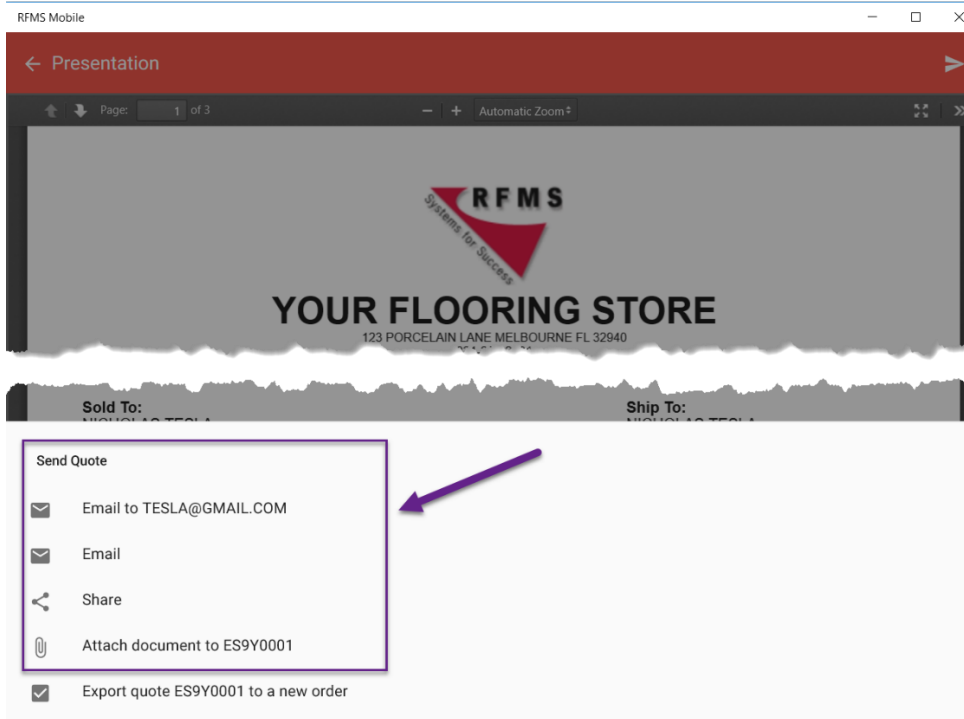
Quotes, Orders, Invoices, BidPro Estimates, Purchase Orders, Work Orders, Delivery Tickets, Remittance Advices, Statements, and Pay Stubs all can be emailed directly from RFMS, RFMS Mobile or Measure Mobile. When printing the document from core you have the option to select an "email" box. If email addresses are populated in the customer or supplier file, the system will automatically pull the email address into your email from those files. You option to type in additional email addresses if needed and your document will be attached.

From Core Quotes:



From RFMS Mobile:

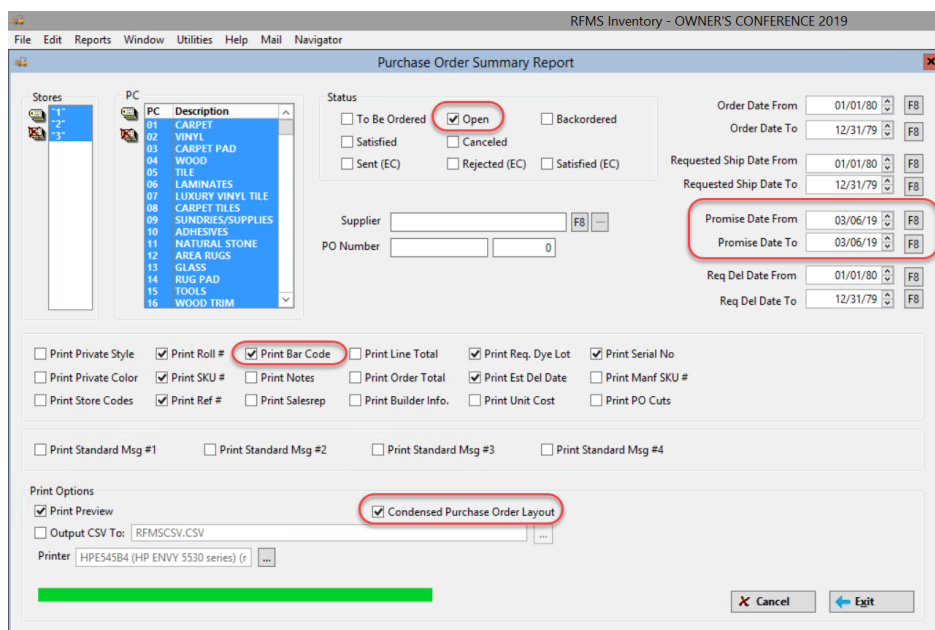




## UTILIZE PO SUMMARY REPORTS FOR RECEIVING

Paper cannot totally be eliminated when it comes to purchasing/receiving but the amount of paper consumed can be minimized by utilizing the PO Summary reports for receiving. Rather than printing all the purchase orders, your warehouse can print the PO Summary Report which will identify shipments that should arriving at the warehouse that day. These reports are printed in order of Promise Date and Supplier. Bar codes printed on the report makes receiving easy.

*Inventory > Reports > Purchase Order Summary Report.*



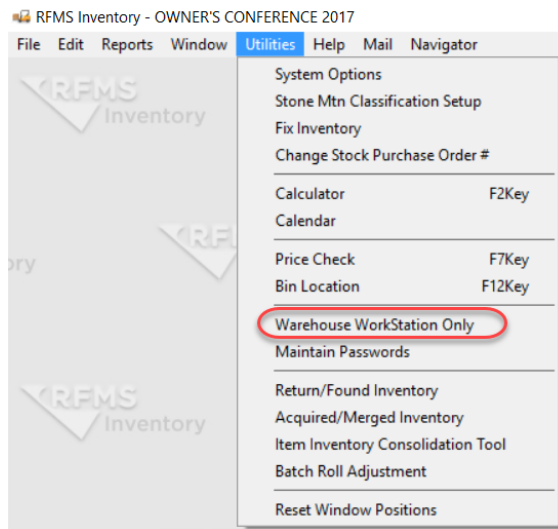
PURCHASE ORDER SUMMARY REPORT

PO NUMBER	SUMMARY	ACCOUNT NUMBER	N/A					Page: 1
From		Ship To		Supplier				SUMMARY
SUMMARY		SUMMARY		SEE BELOW				
Order Date	Product Code	Item Number	Style/Item	Color/Description	Roll/Cut	Amount Ordered	Units	Quoted Unit Price
** Supplier: MORANK FACTORING LLC								
03/06/19	04	WREDD	WOOD REDUCER - WOOD MOLDING	BRAZILIAN CHERRY NAT	-----	2.00	EA	03/06/19
		PO #: C0700031-0002		Desc#: 05075		Width: 0.17		
		Taken By: AME		Comments:		Leath: 7.00		03/06/19
		Slidema#: BRADY - LAM/VIN						
		Ref #: 1234567		Sk# #:				
		Dye Lot:						
		ID #:						
		Item Size: 0.17X7		These are 1 EA per BX				
		Ordered By: BS		This PO is for 2 BX			Shipping Weight:	23.59
-----								
03/06/19	07	W634	M630 ADHESIVE - VINYL ACCES	M630	-----	2.00	EA	03/06/19
		PO #: C0700031-0006		Desc#: M630				
		Taken By: AME						
		Slidema#: BRADY - LAM/VIN						
		Ref #: 123456		Sk# #:				
		Dye Lot:						
		ID #:						
		Item Size: 0.17X7		These are 1 EA per BX			Shipping Weight:	128
		Ordered By: BS		This PO is for 2 BX				
-----								
** Supplier: SHAW INDUSTRIES								
03/06/19	02	C07000310005	APOLLO	MARATHON	Cut	20.00	SY	03/06/19
		PO #: C0700031-0005		Color#: 00526		Width: 12.00		
		Style #: 0614V				Leath: 15.00		03/06/19
		Taken By: AME		Comments:				
		Slidema#: BRADY - LAM/VIN						
		Ref #: 123456		Sk# #:				
		Dye Lot:						
		ID #:						
		Ordered By: BS					Shipping Weight:	23.59
-----								
** Supplier: SHAW INDUSTRIES INC								
Tel#: 889-469-6410 Act#: 93252								
03/06/19	06	SL204	AMERICANA COLLT	BRAZLN CHERRY	-----	302.28	SF	03/06/19
		PO #: C0700031-0001		Desc#: 00828		Width: 0.42		
		Taken By: AME				Leath: 3.92		03/06/19
		Slidema#: BRADY - LAM/VIN						
		Ref #: 123456		Sk# #:				
		Dye Lot:						
		ID #:						

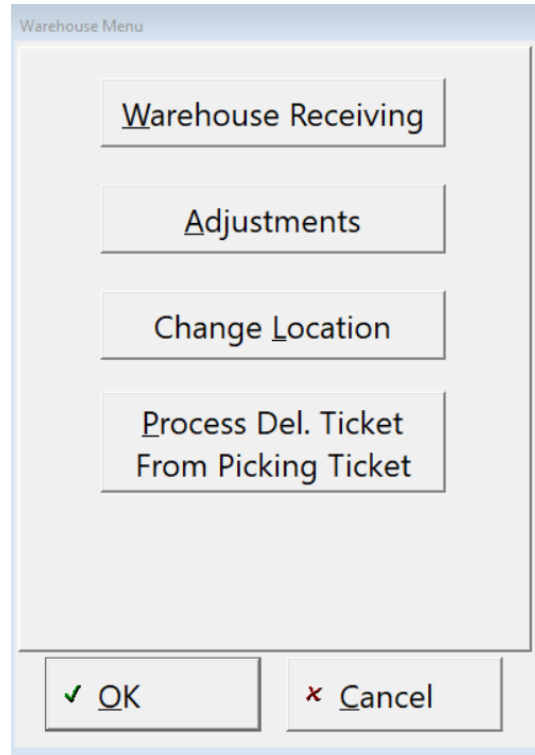
## WAREHOUSE WORKSTATION MODE

Warehouse is a module within Inventory that simplifies the receiving process by allowing employees to receive inventory in one step. It also allows for making adjustments, moving inventory locations and processing delivery tickets from pick tickets. To set a computer to Warehouse Workstation mode you need to physically be on that computer then, go to:

*Inventory > Utilities > Warehouse Workstation Only*



Once the computer is in Warehouse Workstation Mode and your warehouse worker accesses inventory these are the options that will be available to that user:



Warehouse receiving, Adjustments, Changing Locations and the processing of delivery tickets can all be performed by scanning the bar code from the appropriate documents. Simplifying the warehouse process improves accuracy and eliminates the additional time it to manually enter information.

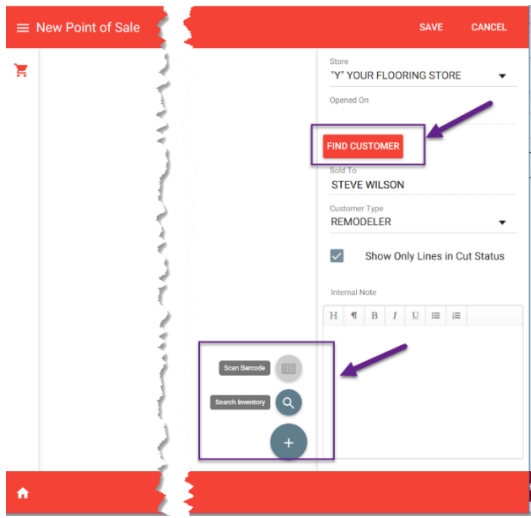
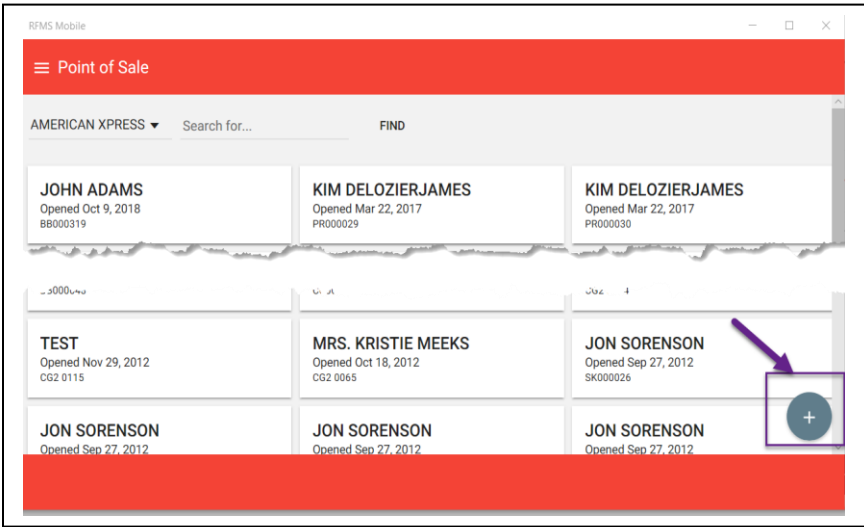
## **RFMS MOBILE POINT OF SALE - SUPPLIES SOLD TO INSTALLERS**

By using RFMS Mobile you can add supplies to an order, cut the lines and send them out the door with a few simple steps.

In RFMS Mobile select "point of sale" add an order, then from the "choose customer" list select your installer, then start adding product by either searching inventory or scanning the bar code from the product.

**RFMS Mobile** 1.7.32


- CUSTOMERS
- PRODUCTS
- INVENTORY
- ORDER ENTRY
- POINT OF SALE**
- SCHEDULE PRO



Save the order. When the order is saved the lines are put in a cut status. You can then click on create PDF to create a Pick-Up document for your installer to sign and accept. This will automatically be attached to the order. You also have the option to email a copy of the Pick-Up document to the installer by clicking on the send.

☰ STEVE WILSON EDIT

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 **TACKSTRIP - CONCRETE: FOR CONCRETE FLOORS** 1 BOX \$36.65

\$36.65 / BOX | Item #: TC | Status: Cut

Store  
"Y" YOUR FLOORING STORE

Opened On  
**03/24/2019**

Sold To  
**STEVE WILSON**


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OPEN ORDER CG9Y0002

← PDF SEND

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Page: 1 of 1 Automatic Zoom



## Pick Up Document

YOUR FLOORING STORE  
123 PORCELAIN LANE MELBOURNE FL 32940  
321-254-2491

**Order Number: CG9Y0002**

**Sold To:**  
STEVE WILSON  
3904 MALONE ROAD  
NORTHPORT. AL 35473

**Date: Mar 24, 2019 4:11 PM**  
**Salesperson: JENNIFER KING**

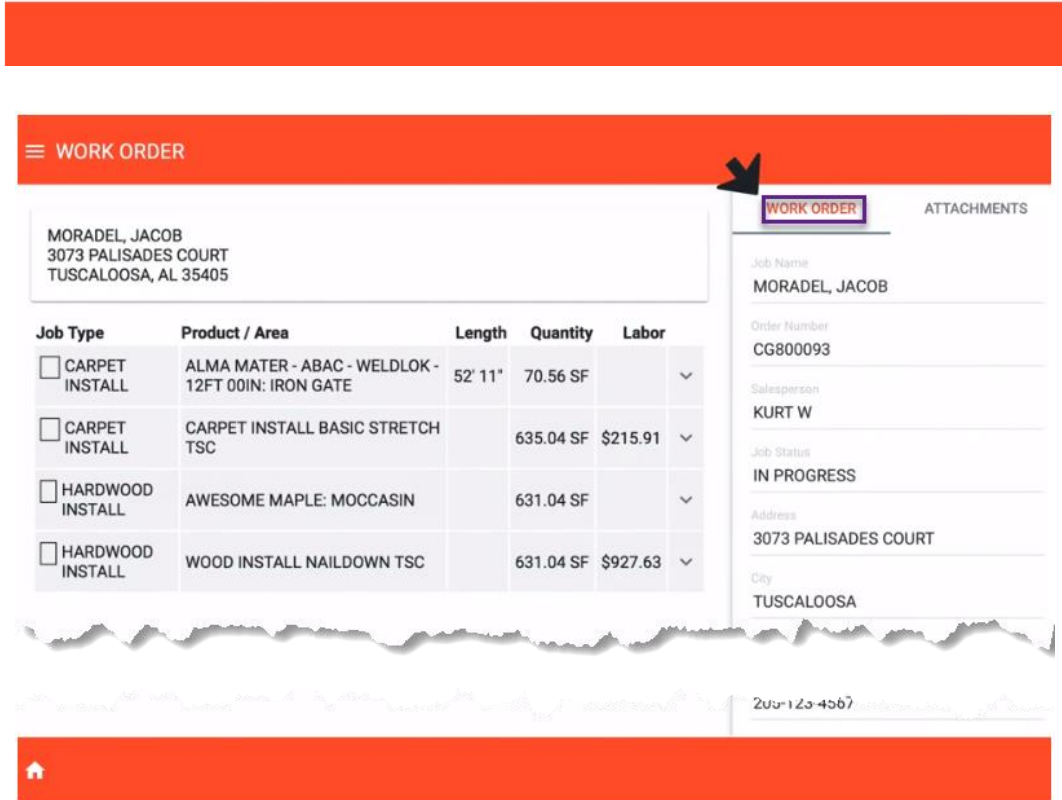
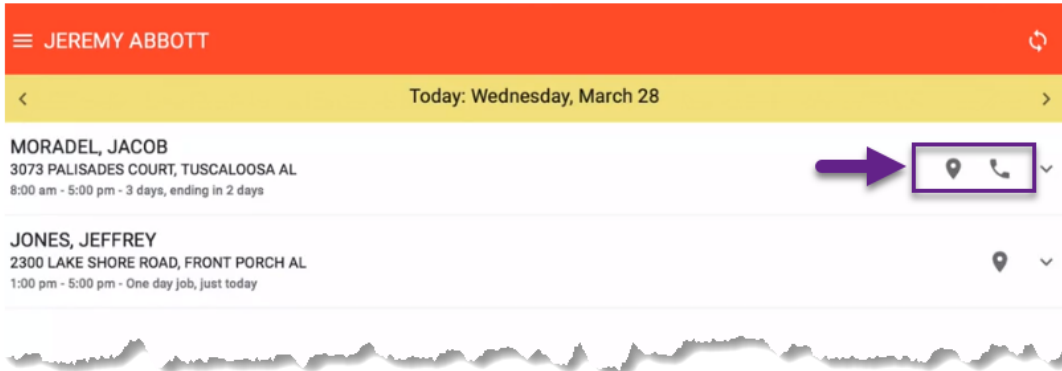
Steve Wilson

Steve Wilson

CLEAR ACCEPT

# MOBILE WORK ORDERS

Installers can benefit from a new feature in RFMS Mobile called Mobile Work Orders. Designed for RFMS users who own the Schedule Pro module, this feature provides limited access to the RFMS Mobile app to installers so that they can view Work Orders assigned to them. They can get directions to the job location by clicking on the location Icon and they can call the customer directly from their device by clicking on the phone. If allowed, installers can change Job status and view certain types of notes and attachments. They can also attach photos, notes and even collect a signature on the digital work order from the property owner upon project completion.



## MULTIPLE ONLINE PAYMENTS

On Line payments can be made in multiples from the check writing screen. Tag the AP invoices that need to be paid. On the check writing screen click On Line. This option allows including payables with a credit balance.

The screenshot shows the RFMS Accounting interface. The main window is titled 'Flagging For All Suppliers' and contains a table of invoices. A 'Check Writing Information' dialog box is open over the table, with the 'Online' radio button selected. The table lists various suppliers and their invoices, with the last row for 'SHAW INDUSTRIES INC' highlighted in blue. The dialog box shows settings for the checking account, check date, starting check number, printer, and remittance printer. The 'Remittance Copies' is set to 1, and the 'Online' radio button is selected. The 'Print Hardcopy Of Emailed Remittance' checkbox is unchecked. The dialog box also includes 'OK' and 'Cancel' buttons.

Supplier	Payee	Invoice	Gross Amount	Disc. Rate	Net Due
BEAULIEU	BEAULIEU	12	32,498.55	5.00	30,873.62
CAMELOT CARPET / CIT GRO	CAMELOT CARPET / CIT GROUP	SWWW	3,748.00	0.00	3,748.00
COMCAST	COMCAST	20170201	225.00	0.00	225.00
EMSER TILE LLC	EMSER TILE LLC	123	973,000.00	0.00	973,000.00
EMSER TILE LLC	EMSER TILE LLC	998	21,382.84	0.00	21,382.84
MOHAWK FACTORING	MOHAWK FACTORING	042319	4,072.59	2.00	3,992.44
MOHAWK FACTORING	MOHAWK FACTORING	654334	5,724.00	0.00	5,724.00
SHAW INDUSTRIES INC	SHAW INDUSTRIES INC	12345X	8,819.00	5.00	8,381.30
SHAW INDUSTRIES INC	SHAW INDUSTRIES INC	6644223232	55,144.69	5.00	52,389.96
SHAW INDUSTRIES INC	SHAW INDUSTRIES INC	764321	1,392.57	5.00	1,323.44
SHAW INDUSTRIES INC	SHAW INDUSTRIES INC	89543D	851.18	5.00	808.62
SHAW INDUSTRIES INC	SHAW INDUSTRIES INC	98763020	23,084.52	5.00	21,932.79
SHAW INDUSTRIES INC	SHAW INDUSTRIES INC	C768594883	55,144.69	5.00	52,389.96

Ctrl + Left Click to Tag/UnTag Entire Supplier    Total Flagged A/P: 144,436.65    Total Check Amount: 137,226.07    No. Checks Needed: 1

Invoice Date: 03/16/19    Disc Rate: 5.00    Non Disc: 50.00  
 Due Date: 03/16/19    Discountable: 55,094.69    Invoice Total: 55,144.69

## 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). Direct Deposit and EFT combined with the emailing of pay stubs and remittance copies makes both of these processes virtually paperless.

**NOTE:** 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.

**NOTES:**