



Systems for Success

A large decorative graphic on the left side of the page, consisting of three overlapping, wavy, curved shapes. The top shape is light gray, the middle shape is dark red, and the bottom shape is black. The shapes flow from left to right, curving upwards as they go.

Version 19.0 Update Document

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3073 Palisades Court
Tuscaloosa, AL 35405

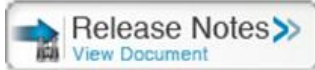
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This update to the Windows version of the RFMS Business Management System includes many new features and enhancements. The update also includes many "behind the scenes" changes that increase processing speed and other performance related functions. This document explains only the new features contained in this update. For all changes, see the release notes on the download web page. Click the release notes button to find these.







To see what you may have missed in previous updates, click here.

[For directions on loading updates to the RFMS software, click here.](#)












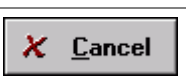






The same documentation is included in the online help system and can be accessed by pressing the F1 button at any RFMS screen. If there is something on the screen that you either don't recognize or understand, check this document or refer to the Help Files pressing F1.





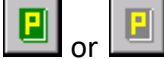
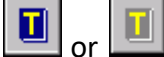


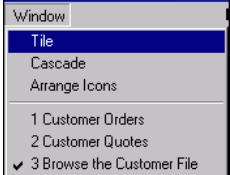



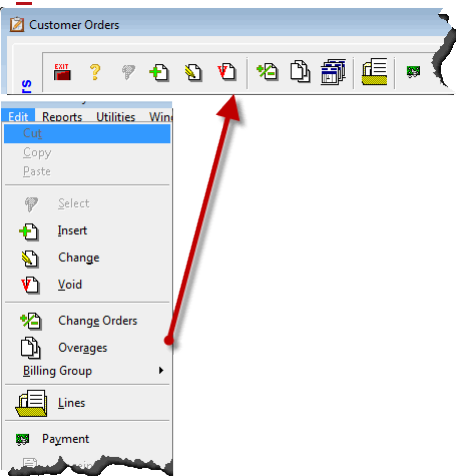
Documentation Conventions

 Notes:	Indicates extra Information
	This symbol indicates a best practice or an example.
<u>Setup</u> >System Setup	Indicates Menu item shortcuts: An underlined letter indicates this is a "hot key." On Main menus, click the Alt button plus that key to go directly to that field or function. On Drop, Down menus type that key.
Field Name	Indicates a Field Name or button Name
Important	Important information
Screenshots	To conserve space the screenshots are seldom actual size and may have blank spaces or other non-essential information cropped from them.
	Links to other documents or web pages are included when additional explanations are available. Click the notebook to find that information.
Links to other topics	Various places in this document have links to other topics in the document. To return to the original topic, click Alt + left arrow. Try it out with the link to the left!
User-Defined FIELD	RFMS has many fields that can be user-defined. In the documentation, these will be shown in all capitals with the abbreviation UD before the field name. <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> UD JOB # _____ UD HEADER LABEL 1 _____ UD HEADER LABEL 2 _____ </div>

Update Release Notes	<p>Update documents contain only the new features contained the software updates. For all changes, see the release notes on the download web page.</p> <p>Click the release notes button to find these. </p>
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RFMS Button and Menu Conventions

	Exit the current screen. Can also use the Escape key on the keyboard.
	Access the help file. Can also use the F1 Key on the keyboard.
	Activates or selects the highlighted record.
	Add a new record. Can also use the Insert key on the keyboard.
	Make changes to a record.
	Delete a record.
	Add or View Notes on a record.
	View all notes and Client Management Remarks related to a record.
	Find a record using specific fields. Changes to blue when a find is in process.
	Resets a filter to the default settings.
	Refresh the browse without resetting the filters
	Saves the current information and exits the screen.
	Exits the screen without saving the newly entered information.
	Exact match required in a search.
	Partial match only required in a search.
 or Ctrl-S	Text search Reminder: this searches the browse list from the highlighted record down only. When beginning a search, it is best to begin at the top of the list.
	Print a document or go to a report menu.
	Allows adding, changing, or deleting the graphic, non-graphic files, or web sites.

	Tag Untag Tagall or Un-tagall record(s). Selects records
	View details of a record.
	Send an email or RFMS mail message regarding the highlighted record.
	View the history of a record.
	View the pdf history of reports for the highlighted record.
	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.
	Brings up the Client Management remote actions screen and allows adding a CMM action or relate a CMM record to this record. Yellow indicates that CMM information is associated with the highlighted record
	With all date fields in RFMS, hit the D key to fill in today's date, type in a date, use the up and down arrows to move the date one day at a time or click F8 to bring up the calendar and then choose the date.
	The bottom part of the screen lists all windows open in the current module. The one currently being viewed is checked. To view a different window, click it with the mouse.
	Access to customizing the toolbar
	Disabled Field. If set in <i>>Utilities>System Options>System Wide>General > (Set Up Global Interface System Options or Override Global Interface System Options)</i>
	Required Field. If set in <i>>Utilities>System Options>System Wide>General > (Set Up Global Interface System Options or Override Global Interface System Options)</i>
Edit Menu	The Edit Menu can be used as a shortcut to the toolbar options. >Edit> 

System-Wide

PO Integration

PO Integration being turned off will no longer be recommended by RFMS starting in 2020. If there are issues related to PO Integration being off, then the suggestion to resolve will be to turn it on.

Date Shortcuts

Click [here](#) for more details.

Ctrl + F=First day of LAST Month

Ctrl + L= Last day of LAST Month

A=First day of Current Year

Z=Last day of Current Year

Ctrl + A=First day of LAST Year

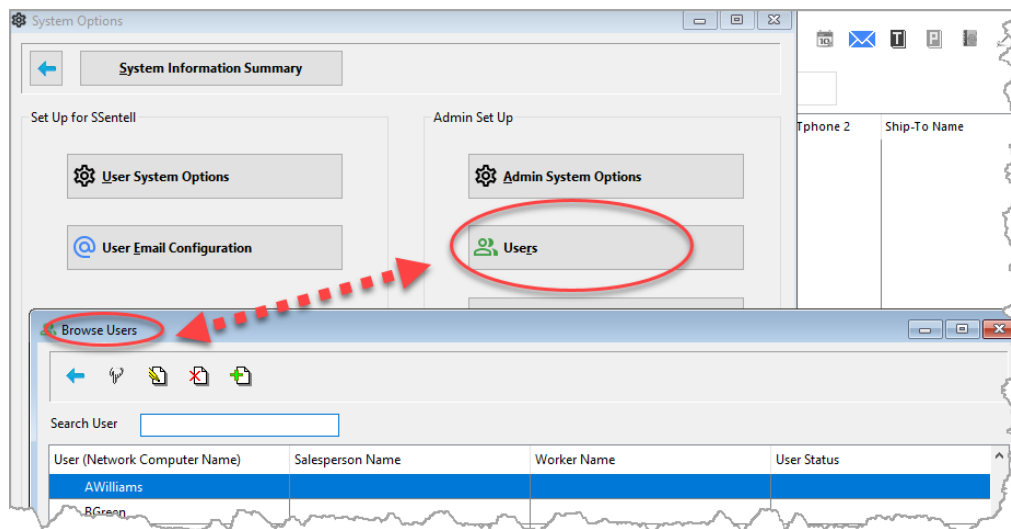
Ctrl + Z= Last day of LAST Year

X=12/25/yyyy (yyyy=current year). The date will be the next year if the date is after 12/25.

Users

Utilities>System Options>Users>Browse Users

The [Copy Browse](#) feature has been added to the User Browse screen.

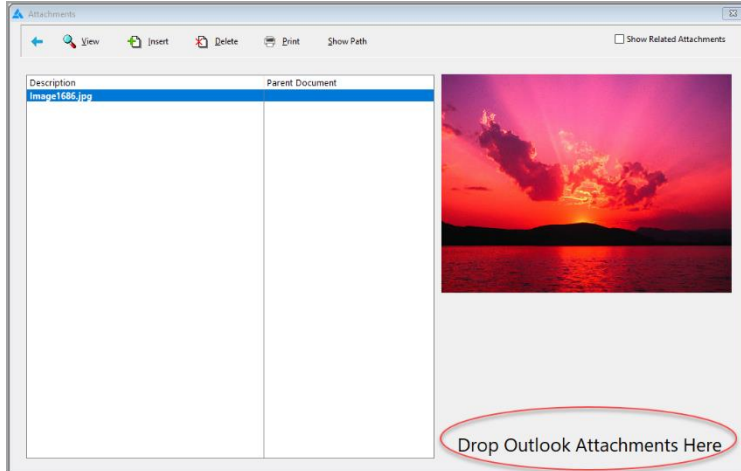


Reports

Reports that are printed on Legal Size paper will now print on A3 paper. This is for Australia and New Zealand.


Attachment

The ability to Drag and Drop attachments from Outlook has been added to all Attachment screens.



This feature only works with Local Set Up not with Remote Set Up.

Export to Order

The Export to Order button has been changed throughout the program to  for consistency.

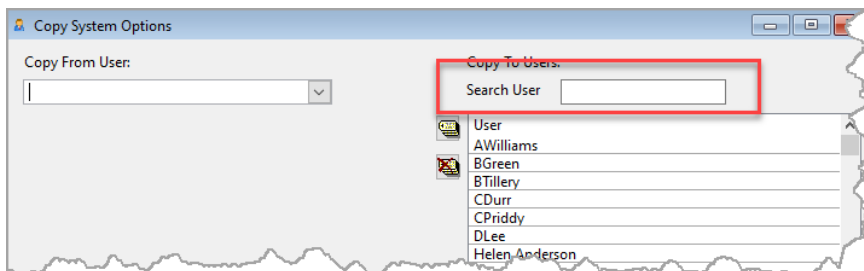
System Options

Browse Screen

The Browse screen can now be sorted by columns.

Copy System Options

A search box has been added to the Copy To Users side of the Copy System Options browse screen.



System Option Changes

Update Quote or BidPro Customer Information if Customer is Edited System Option has been removed because of the new [Update Customer Data](#) feature.

Order Entry

Notifications

Utilities>Setup>Notifications

This feature gives users the ability to set up different types of notifications in Order Entry, Schedule Pro, and BidPro. The Notification can be sent by email, text, pop-up message, or Interoffice Mail in RFMS. It can notify a user or customer about various things such as dates approaching, line status changing, orders being created, and much more.

For more details, Click [here](#).

RFMS Smart Search Fields

Customer Address Line 2 and Ship-To Address Line 2 has been added to the RFMS Smart Search in Quotes, Orders, and Claims.

Customer Orders, Quotes, and Claims

Unreferenced Lines

Unreferenced lines are now displayed in red in Quotes, Orders, and Claims.

Customer Order - ST000034

Original Order

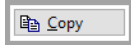
Order # ST000034 FB

Sold To
GOOD, GLINDA THE
123 YELLOW BRICK ROAD
EMERALD CITY, OZ 123456
County: MUNCHKIN LAND

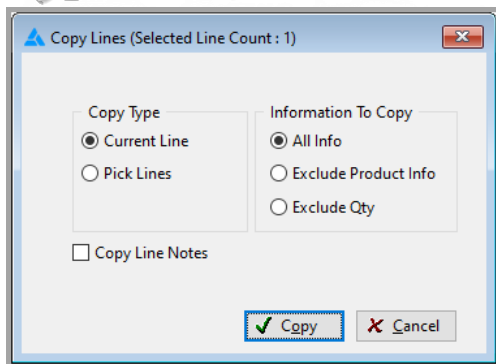
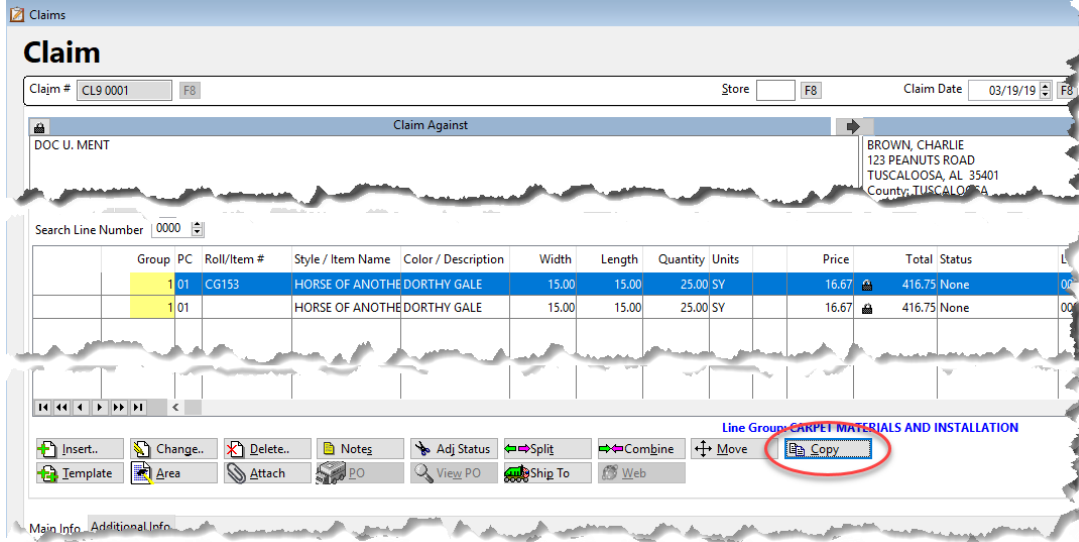
Sales Rep #1 DOC TEST 100.00%
Sales Rep #2 0.00%
Time Slot -None-

Line #	Style	Product Code	Roll/Item Number	Color/Description	Status	Group		
Search Line Number	0000							
	Group	PC	Roll/Item #	Style / Item Name	Color / Description	Width	Length	Quantit
		01		HORSE OF ANOTHE WIZARD OF OZ		30.00	100.00	333.2
		1 81	CP/AP-G	CPT-(APT)-GLUEDC		-----	-----	100 *
		1 04	GOLD-7/16	GOLD-ADVANCED	6# REBOND-7/16"	6	45	1.1
		1 04	BRONZE-7/16	BRONZE-BASIC	3.5# REBOND-7/16"	6	60	1.0u
		1 04	TITANIUM-SUP	TITANIUM-SUPRE	8# STAINMASTER N	6	45	1 *
		1 81	CP/AP-G	CPT-(APT)-GLUEDC		-----	-----	1.
		1 01	UNREFRED	UNREF RED	RED	12.00	150.00	200.0

Copy a Line



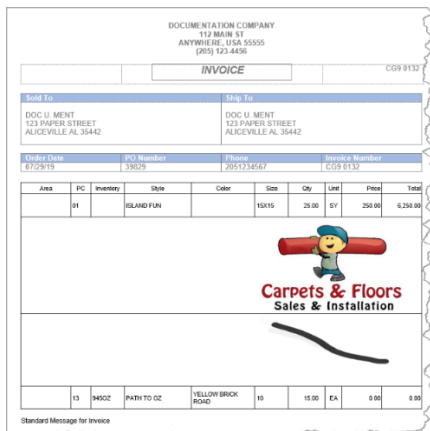
The ability to copy a line has been added to the Orders, Quotes, and Claims screen.



If Exclude Product Info is selected, the line is created with a zero-selling price.

Word Merge

Line attachments now appear on Word Merge Orders and Quotes.



Customer Orders

Find Screen

A filter has been added to find orders/claims where Provider Records are Balanced with labor on the lines. Schedule Pro job status has been added to the Find screen.

The screenshot shows the 'Find Orders' window with the following elements:

- Order Number:** Input field.
- Sold To:** Fields for Name, Address 1, Address 2, City, State, and Zip.
- Ship To:** Fields for Name, Address 1, Address 2, City, State, and Zip.
- Stores:** A list of store names on the right side.
- Filters:**
 - All Lines Delivered (available if "Delivery Date Options" is "Un-Delivered Only")
 - Providers Balanced** (highlighted with a red box)
 - Order Date From: 01/01/80 To: 12/31/79
 - UD ED Date: 01/01/80 To: 12/31/79
 - UD Date2 MD: 01/01/80 To: 12/31/79
 - Delivery Date From: 01/01/80 To: 12/31/79
 - Close Date: 01/01/80 To: 12/31/79
 - Invoiced/Billed From: 01/01/80 To: 12/31/79
 - Date Entered: 01/01/80 To: 12/31/79
 - Job Cost Trans. Date: 01/01/80 To: 12/31/79
 - Balance From: 0.00 To: 0.00
 - Commission Not Paid
 - Exclude Voids
 - On Hold
- Balance Options:** All
- Delivery Date Options:** All
- Remark Type:** Dropdown menu
- Ad Source:** Dropdown menu
- UD ORDER TYPE:** Dropdown menu
- UD Contract Type:** Dropdown menu
- UD SERVICE:** Dropdown menu
- Phase:** Input field
- Instr:** Input field
- Block:** Input field
- Lot:** Input field
- Order:** Input field
- Bidg Link#:** Input field
- Buttons:** Clear, Save, Load, Create as Static List, OK, Cancel.



Records without Provider Records will not display when the Providers Balanced checkbox is checked.

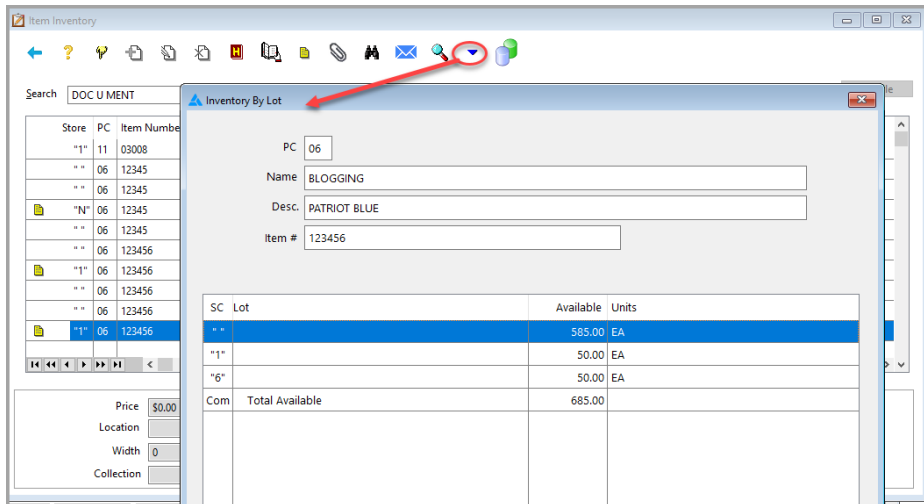
To Find Cash and Carry orders, filter for Undelivered Only and All Lines Delivered without the Providers Balanced checkbox.

Roll and Item Inventory

The ability to view Available Inventory by Dye/Run Lot has been added. This can be viewed by clicking the View Dye Lot Information button on the toolbar.

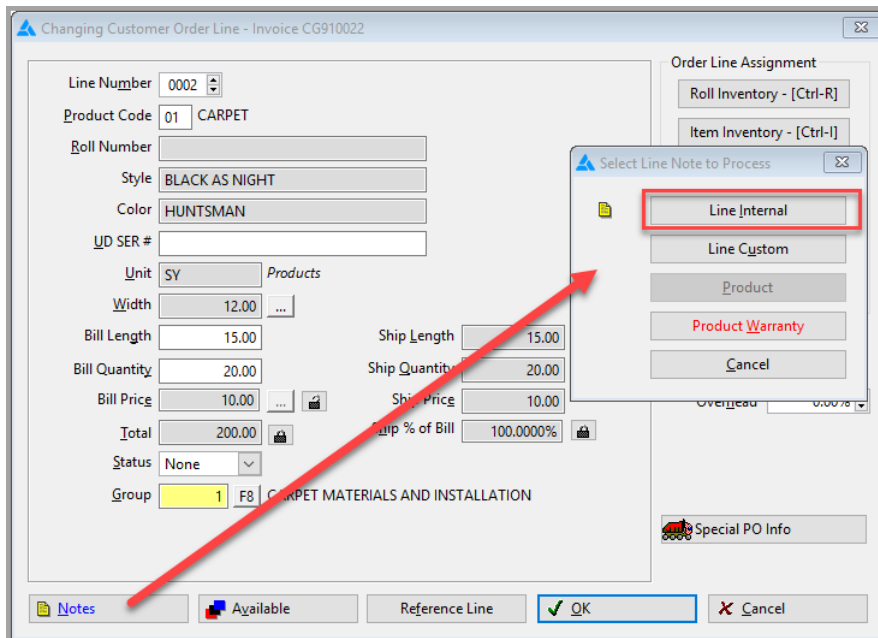


The Inventory By Lot screen will appear with amounts and total.



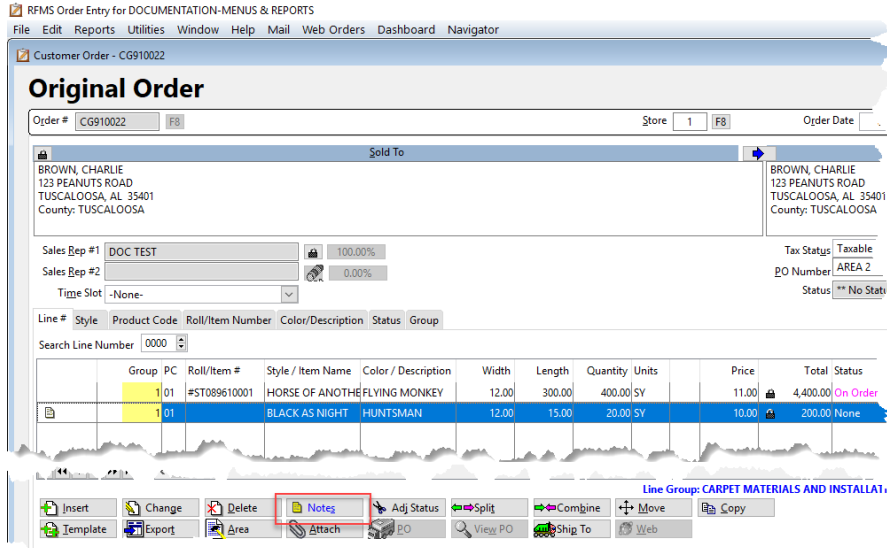
Line Notes

An Internal Line Note has been added.

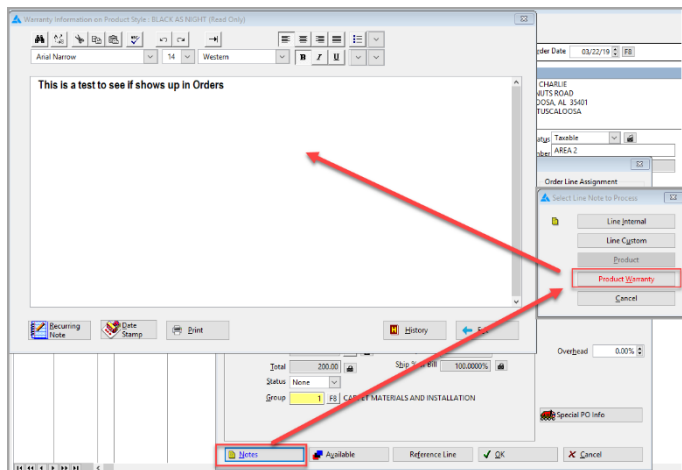
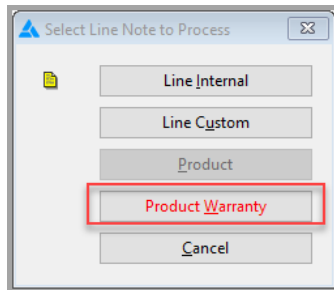


Product or Warranty Notes

Product notes and/or Warranty Notes can be seen on the order line. The Notes button will be blue if there is a product or warranty note.



To view the notes, the user must be editing the line. The Product and/or Warranty button will be in red.



If a line has a product note or a warranty note only, the note icon to the left of the line will be white.

If a line has a Line Internal Note and or a Line Custom Note, the icon to the left of the line will be yellow.

If a line has a mixture of product, warranty, Internal and Line Custom notes the icon to the left of the line will be yellow.

Search Line Number	Group	PC	Roll/Item #	Style / Item Name	Color / Description	Width	Le
0000	1	01	#ST089610001	HORSE OF ANOTHE FLYING MONKEY		12.00	
	1	01		BLACK AS NIGHT	HUNTSMAN	12.00	
	1	01		BLACK AS NIGHT	MAGIC MIRROR	12.00	

Areas

The Insert/Edit/Delete buttons now can be password protected on the Browse Areas screen.

The screenshot displays the 'Original Order' software interface. At the top, it shows 'Original Order' and 'Customer Order - C021002'. Below this, there are fields for 'Order #', 'Store', 'Order Date', and 'Iphone 1'. The main area is a table with columns: Line #, Style, Product Code, Roll/Item Number, Color/Description, Status, and Group. A search bar is located at the top left. A toolbar at the bottom contains buttons for 'Insert', 'Change', 'Delete', 'Notes', 'Attach', 'Adj Status', 'PO', 'Vary PO', 'Split', 'Combine', 'Move', and 'Copy'. A 'Browse the Area File' dialog is open, showing a list of areas with columns for 'Area' and 'Sequence'. A 'Line 0001' dialog is also open, showing fields for 'Area', 'Length', and 'Quantity'. Red arrows point to the 'Insert', 'Edit', and 'Delete' buttons in the toolbar and the 'Browse the Area File' dialog.

View PO



The ability to view Freight Carrier and Tracking Number has been added on the View PO screen in Order Entry.

The View PO from Order Line screen will also now include the Buy/Sell Quantity information.

The screenshot shows a 'Purchase Order for Order CCG 0140, Line Number: 0001'. It includes fields for PO Line #, Order Date, Store Code, Product Code, Manufacturer, Supplier, Private Supplier, Item #, Name, Description, UID SER #, Units, Description #, Private Item #, Private Name, Run Lot, Date Received, AP Inv Number, Supp Phone #, and Supp Account #. It also displays dimensions (Width: 10.00, Length: 20.00), Quoted Price (10,000), Amt Ordered (50,000 EA), and Amt Received (50,000). A note states 'There are 50 EA per BX. This PO is for 1 BX.' The 'View PO' button is highlighted with a red box.

Print Customer Documents

Delivery Tickets

The Vendor Purchase Order Number now prints on the Delivery Ticket

The screenshot shows a 'Delivery Ticket' for 'DOCUMENTATION COMPANY' dated 08/08/19 at 3:02PM. It includes 'Sold To' and 'Ship To' information for MENT, DOC U. at 123 PAPER STREET, ALICEVILLE, AL 35442. The invoice number is ST000018. The customer purchase order is for DOC TEST. The ticket lists three order lines with their respective quantities and dimensions. Vendor PO numbers are highlighted with red boxes:

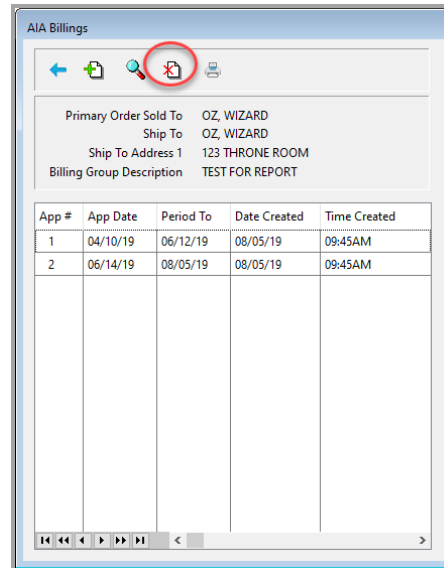
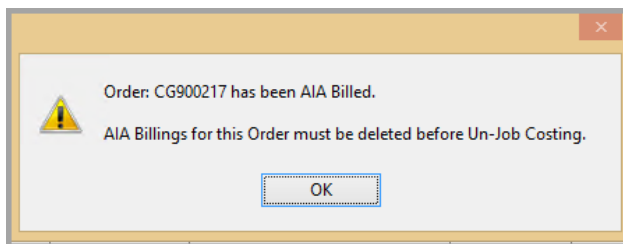
- Line #0001: AMERICAN PATRIOT/STATUE OF LIBERTY, 15.0000 EA, Vendor PCST0000180001
- Line #0002: TWIN LAKES ENGINEERED - WALNUT - 5" CRIMSON MAPLE, 112.5000 SF, Vendor PCST0000180005
- Line #0003: HORSE OF ANOTHER COLOR/OIL CAN, 150" x 2000" SY, Vendor PCST0000180004

Estimated Job Cost

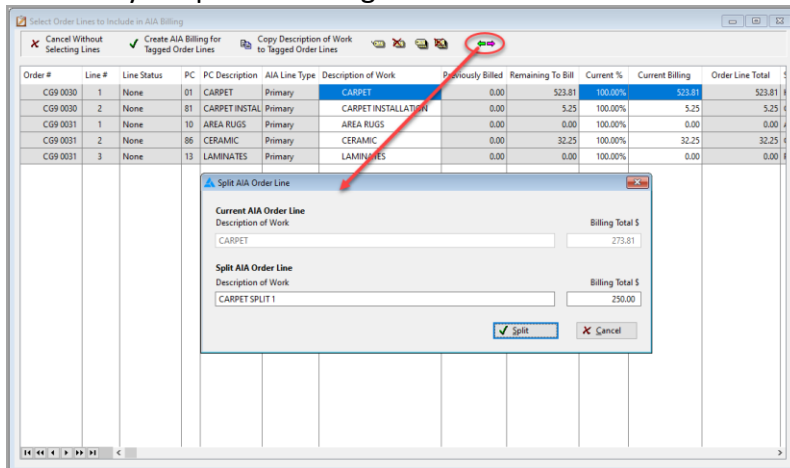
Estimated Job Cost Parameters on this screen are no longer editable.

AIA Billing

The ability to delete a billing has been added to this screen. It has a default password setting of Level 1. This was added to allow a job with AIA Billing to be un-job costed.



The ability to split AIA Billing lines has been added.



Notes:

- Splitting AIA Billing Order Lines is only available for the "Select Order Lines" method.
- Only Primary AIA Billing Lines can be Split.
- Split off amount cannot be edited and must be fully billed in the billing the split was done. If it is not tagged when Creating the AIA Billing, the split line details will not be saved and will have no effect on future AIA Billings.

- If a primary AIA Billing Order Line is split, the Description of Work for the primary line can no longer be edited.
- If a primary AIA Billing Order Line Description of Work has been edited, it cannot be split.
- The split AIA Billing Order Line Description of Work cannot be the same as the primary AIA Billing Order Line.
- If a primary AIA Billing Order Line is split more than once, each split line must have a different Description of Work.
- Split AIA Billing Order Lines will have an incremental split number that can be seen in the AIA Line Type column. Also, the split icon will be displayed in the Description of Work column.
- The primary AIA Billing Order Line will be reduced by the amount split off in the current AIA Billing and all future AIA Billings.

Quotes

Quotes printed using Subtotal by Group Number will now sort by line numbers.

Page 1

DOCUMENTATION COMPANY
112 MAIN ST
ANYWHERE, USA 55555
(205) 123-4456

m
0061

QUOTE

Sold To		Ship To	
DOC U. MENT 123 PAPER STREET ALICEVILLE, AL 35442		DOC U. MENT 123 PAPER STREET ALICEVILLE, AL 35442	
Quote Date	Tphone 1	PO Number	Quote Number
08/05/19	2051234567		ES9 0061

Inventory	Style/Item	Color/Description	Quantity	Units	Price	Extension
#1 - CARPET MATERIALS AND INSTALLATION	BLACK AS NIGHT	DRAGON	20.00	SY	25.00	500.00
#6 - AREA 2	SEARCH FOR TEST	GUNSTOCK RED OAK WIDE PLANK	15.00	EA	0.00	0.00
#10 - AREA 1	MUNCHKIN LAND	LOLLIPOP GUILD	15.00	EA	10.00	150.00

Find Screen

The ability to have a Static List has been added to the Quotes Find screen.

Find Quotes

Quote Number

Sold To

Name

Address 1

Address 2

City

State Zip

County

Bldg/Unit#

Stores

- 1*
- 6*
- N*

Create as Static List

Claims

The ability to add providers and view receipts while editing a claim has been added.

Claims

Claim # CL9 0017 Store F8 iPhone 1 Tax Certificate None Customer # iPhone 2

Claim Against

DOC U. MENT
123 TESTING
AKRON, OH 44341
County: HALE

Claim For

MENT
123 B
ALICE
County

Sales Rep #1 DOC TEST 100.00%

Sales Rep #2 0.00%

Type Slot -None

Claim Order C99 0140

Customer Type DOCUMENTATION

Occupied No

Requested Install Store

Line #	Style	Product Code	Roll/Item Number	Color/Description	Status	Group	Width	Length	Quantity	Units	Price
90	TU/VCTNOASB	TAKE UP VCT NON							15.00	EA	0.30
10	987456	MUNCHIN LAND	BUBBLE TROUBLE				20	30	15.00	EA	10.00

Line #	Est Del	Store	Item Sequence	GP %	Gross Cost	Freight	Load	Overhead	Use Tax
101	n/a		0	0.00%	0.3000	0.0000	0.0000	0.0000	---
102	n/a		0	100.00%	0.0000	0.0000	0.0000	0.0000	---

Material 150.00

Services 4.50

Misc. Charges 0.00

Sales Tax 13.64

Misc. Tax 0.00

Claim Total \$154.50

Line Group: NO

Insert... Change... Delete... Notes Adj Status Split Combine Move Copy

Template Area Attach PO View PO Ship To Web

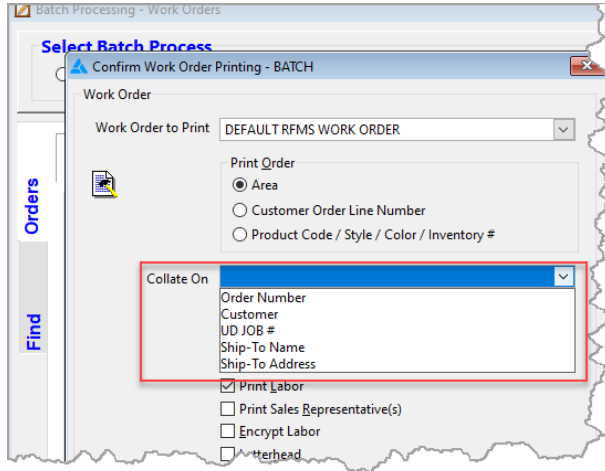
Main Info Additional Info

Schedule Pro Attachments **Providers** **Receipts** Payment Notes Save Cancel

Batch Processing

Work Orders

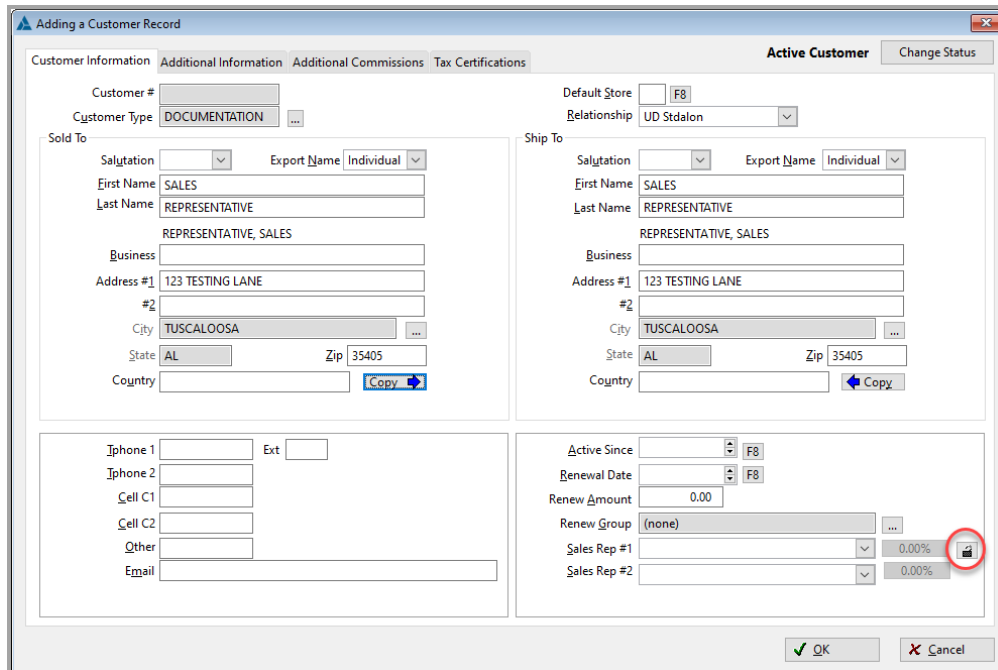
The ability to collate on the Confirm Work Order screen has been added.



Customers

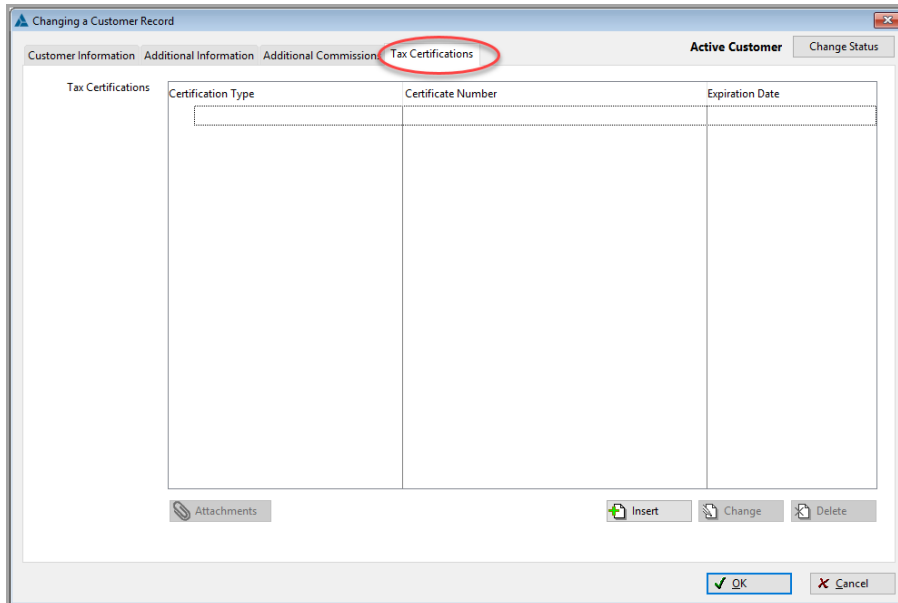
Adding Customers

The ability to edit the Sales Reps will now be unlocked by default when adding a customer.

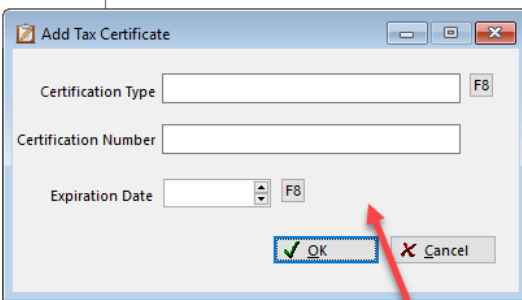


Tax Certificates

A tab has been created on the Customer Record to add, edit, or delete tax certificates for a customer.



The screenshot shows a window titled "Changing a Customer Record" with a tabbed interface. The "Tax Certifications" tab is selected and circled in red. The window contains a table with three columns: "Certification Type", "Certificate Number", and "Expiration Date". Below the table are buttons for "Attachments", "Insert", "Change", and "Delete". At the bottom of the window are "OK" and "Cancel" buttons.



The "Add Tax Certificate" dialog box is shown. It has three input fields: "Certification Type" (with a dropdown menu showing "F8"), "Certification Number", and "Expiration Date" (with a dropdown menu showing "F8"). Below the fields are "OK" and "Cancel" buttons. A red arrow points from the "OK" button in this dialog to the "Insert" button in the main window below.



A close-up of the "Insert", "Change", and "Delete" buttons in the main window. The "Insert" button is circled in red.



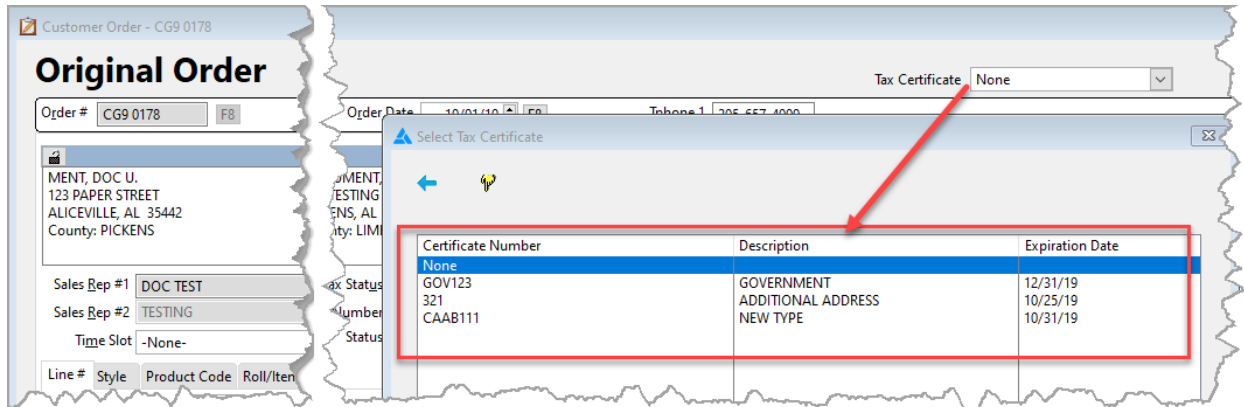
Notes:

When creating an order, the correct Tax Certificate is selected for the user but can be overridden if needed.

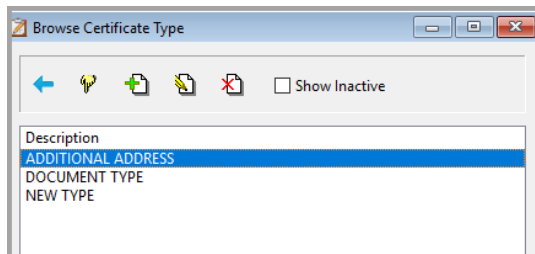
If only one Tax certificate is on the customer record, the one automatically comes in when adding new orders to billing groups.

If there are multiple tax certificates on the customer record, a picklist will appear after entering the customer name. The certificates are listed in the following order None, Ship To, and Customer record.

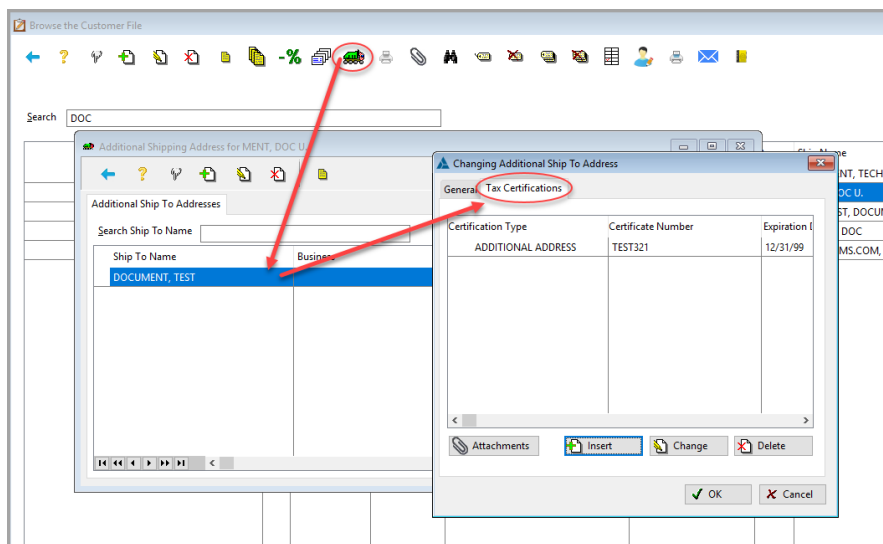
The only certificates that will come over are the Active/Current ones.



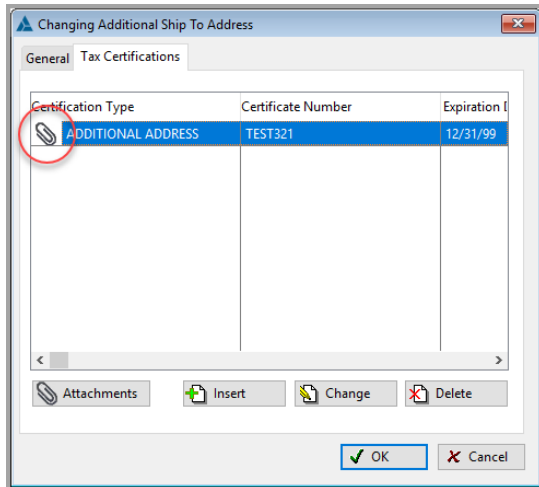
Click F8 beside Certificate Type to Select, Insert, Edit, Delete a Certificate Type.



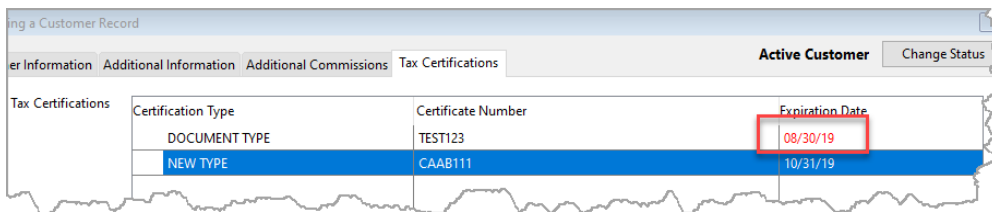
The Tax Certificate tab has also been added to the Additional Shipping Addresses screen in the Customer Record. A Tax Certificate can be pulled from the Additional Ship To addresses even if a certificate was pulled from the Sold To.



If there is an attachment on the Tax Certificate, then the attachment icon will appear on the line.

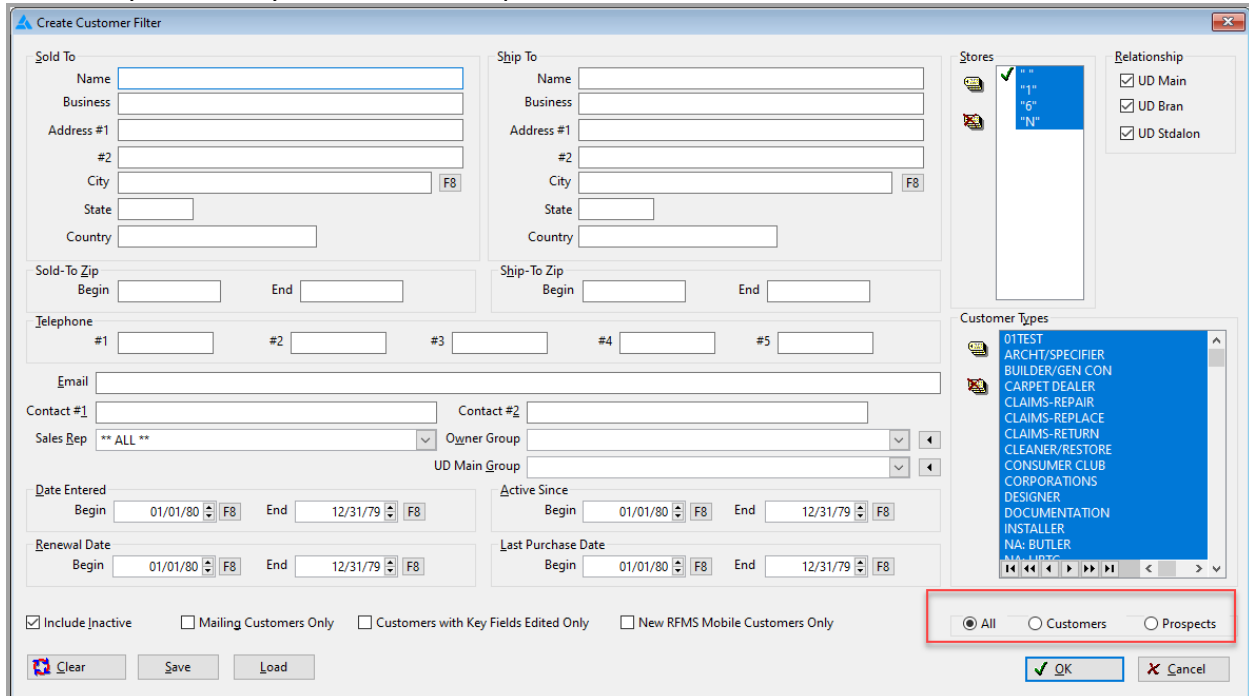


Expired Certificates will be shown in red.



Find Screen

The ability to filter by Customers, Prospects, or All has been added to the Customer Find screen.



Mailing Labels

If a record that is tagged to be printed does not contain certain info, the user is now notified of which customers and what information is missing.

Labels will not print unless all tagged records have all the necessary information.

The screenshot shows a window titled "Browse the Customer File" with a search bar containing "TEST". Below the search bar is a table with columns: Customer Name, CM, Tphone 1, Business, Relationship, Owner, Ship Name, Store, and Salesperson. An error dialog box is overlaid on the table, titled "Error" and "Missing Ship To Info For:". The dialog lists the following customer names: TEST TEST, TEST, BETHANY RECORD, TEST, ARD, INC., TESTCHRICOONE, TESTCHRISONE, LMS TESTING, ANDREW, TEST, 63 REGRESSION, NUMBER ONE, CUSTOMER, MAN, TEST, CUSTOMER TYPE, TEST, CITY, TEST, AMERICAN CHOICE REAL ESTATE, and APLIN, GORDON. An "OK" button is at the bottom of the dialog. A red circle in the toolbar highlights a printer icon.

Customer Name	CM	Tphone 1	Business	Relationship	Owner	Ship Name	Store	Salesperson
AMERICAN CHOICE REAL ESTATE		205-758-2163		UD Stalton			"**"	GORDON
APLIN, GORDON		205-554-1592		UD Stalton		APLIN, GORDON	"**"	HOUSE
ARD, INC.		205-752-0009		UD Stalton			"**"	GORDON
CITY, TEST				UD Stalton			"1"	
CUSTOMER TYPE, TEST				UD Stalton		CUSTOMER TYPE, TEST	"**"	DOC TEST
CUSTOMER, CREDIT CHECK		1234560789		UD Stalton		CUSTOMER, CREDIT CHECK	"N"	DOC TEST
CUSTOMER, EDITED TEST		205-752-2951		UD Stalton				SCOTT
DOCUMENT, TECHNICAL		2057654321		UD Stalton				DOC TEST
EMPLOYEE, TEST		2053331721		UD Stalton				
JONES, MARY & SAM				UD Stalton				
LMS TESTING, ANDREW	P			UD Stalton				
MAN, TEST	P	2051234567		UD Stalton				TESTING
MENT, DOC U.		2051234567		UD Main				DOC TEST
NUMBER ONE, CUSTOMER		2051234444	123 MAIN STREET	UD Stalton				DOC TEST
RECORD, TEST	P			UD Stalton				
RELATED, CONTACTS	P			UD Stalton				
TEST MARIA	P			UD Stalton				JEFF THOM
TEST TEST	P			UD Stalton				KIMBERLY L
TEST, 63 REGRESSION	P			UD Stalton				KIMBERLY L
TEST, BETHANY	P			UD Stalton				ANDREW
TEST, CMM	P			UD Stalton		TEST, CMM	"1"	
TEST, CMM		2052345678		UD Stalton		TEST, CMM	"**"	TESTING

Update Customer Data

Customer Data can now be updated in a group by using the Update Customer screen. Updates can be made to Quotes, BidPro Estimates, and Customer Information.

The screenshot shows the "Update Customer Data" window. It has three tabs: "Update Quotes", "Update BidPro Estimates", and "Update Customer Records". The "Update Quotes" tab is active. There are buttons for "Update Quotes" and "Load & Preview Records to Update". A "Number of Records to Update" field shows "0".

Select Records to Update


- Include Original (Quote not related to another Quote)
- Include Expoted
- Include Primary Quotes
- Include Related Quotes

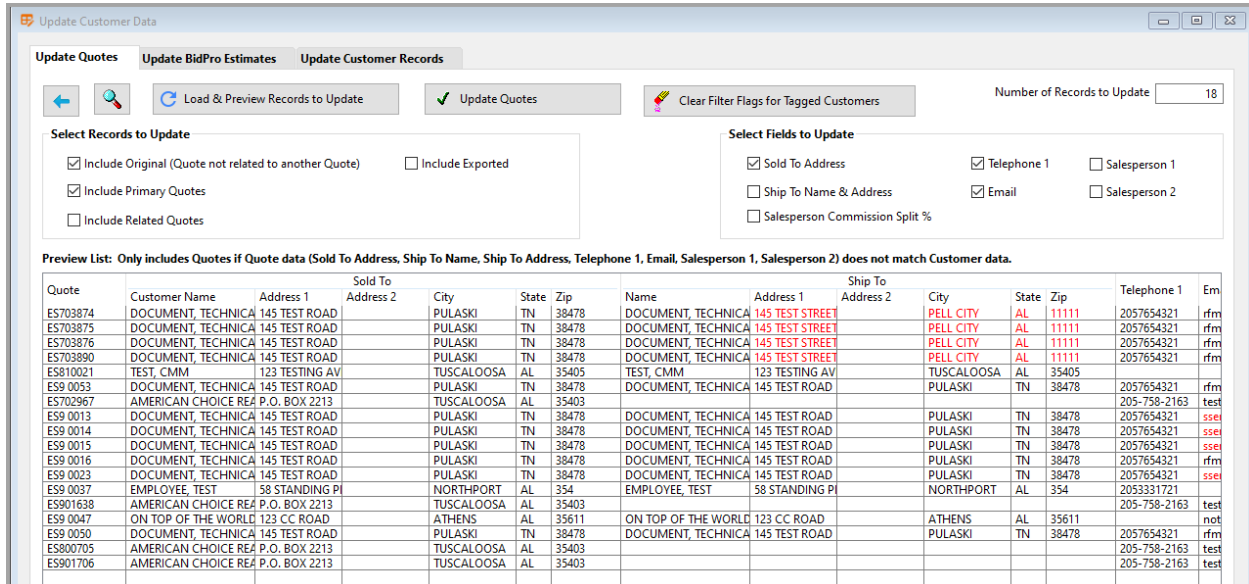
Select Fields to Update

- Sold To Address
- Telephone 1
- Salesperson 1
- Ship To Name & Address
- Email
- Salesperson 2

Preview List: Only Includes Quotes if Quote data (Sold To Address, Ship To Name, Ship To Address, Telephone 1, Email, Salesperson 1, Salesperson 2) does not match Customer data.

Quote	Customer Name	Address 1	Sold To Address 2	City	State	Zip	Name	Address 1	Ship To Address 2	City	State	Zip	Telephone 1	Email	Salesperson 1	Salesperson 2

Tag the Customer(s) that need to be updated and click the Update Customer Data button . Next, make selections from the area needing updating. On the Quotes and BidPro Estimates tab, the records can be previewed before making the change by clicking Load and Preview.



Update Customer Data

Update Quotes | **Update BidPro Estimates** | Update Customer Records

← 🔍 Load & Preview Records to Update ✓ Update Quotes 🗑️ Clear Filter Flags for Tagged Customers Number of Records to Update: 18

Select Records to Update

- Include Original (Quote not related to another Quote)
- Include Exported
- Include Primary Quotes
- Include Related Quotes

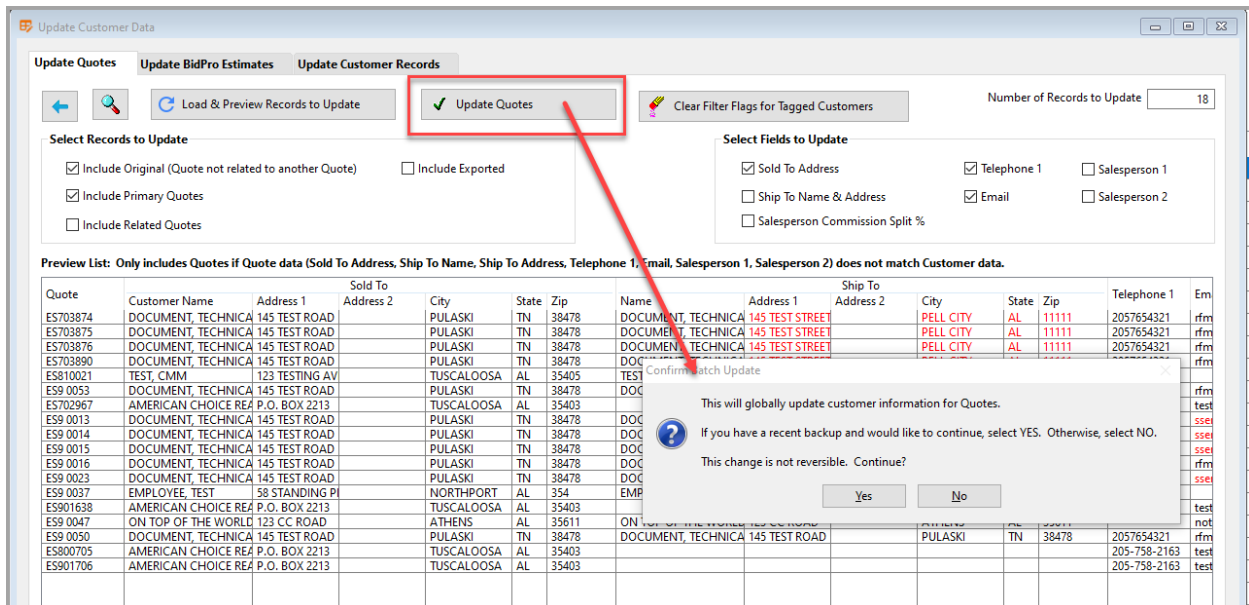
Select Fields to Update

- Sold To Address
- Ship To Name & Address
- Salesperson Commission Split %
- Telephone 1
- Email
- Salesperson 1
- Salesperson 2

Preview List: Only includes Quotes if Quote data (Sold To Address, Ship To Name, Ship To Address, Telephone 1, Email, Salesperson 1, Salesperson 2) does not match Customer data.

Quote	Customer Name	Address 1	Sold To Address 2	City	State	Zip	Name	Address 1	Ship To Address 2	City	State	Zip	Telephone 1	Em
ES703874	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST STREET		PELL CITY	AL	11111	2057654321	rfm
ES703875	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST STREET		PELL CITY	AL	11111	2057654321	rfm
ES703876	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST STREET		PELL CITY	AL	11111	2057654321	rfm
ES703890	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST STREET		PELL CITY	AL	11111	2057654321	rfm
ES810021	TEST, CMM	123 TESTING AV		TUSCALOOSA	AL	35405	TEST, CMM	123 TESTING AV		TUSCALOOSA	AL	35405		test
ES9 0053	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	rfm
ES702967	AMERICAN CHOICE REA	P.O. BOX 2213		TUSCALOOSA	AL	35403							205-758-2163	test
ES9 0013	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	sse
ES9 0014	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	sse
ES9 0015	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	rfm
ES9 0016	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	rfm
ES9 0023	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	sse
ES9 0037	EMPLOYEE, TEST	58 STANDING PI		NORTHPORT	AL	354	EMPLOYEE, TEST	58 STANDING PI		NORTHPORT	AL	354	2053331721	sse
ES901638	AMERICAN CHOICE REA	P.O. BOX 2213		TUSCALOOSA	AL	35403							205-758-2163	test
ES9 0047	ON TOP OF THE WORLD	123 CC ROAD		ATHENS	AL	35611	ON TOP OF THE WORLD	123 CC ROAD		ATHENS	AL	35611		test
ES9 0050	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	rfm
ES800705	AMERICAN CHOICE REA	P.O. BOX 2213		TUSCALOOSA	AL	35403							205-758-2163	test
ES901706	AMERICAN CHOICE REA	P.O. BOX 2213		TUSCALOOSA	AL	35403							205-758-2163	test

Click Update button after checking the information. As the warning states, this change is not reversible. Click Yes if this is the changes that need to be made.



Update Customer Data

Update Quotes | **Update BidPro Estimates** | Update Customer Records

← 🔍 Load & Preview Records to Update **Update Quotes** 🗑️ Clear Filter Flags for Tagged Customers Number of Records to Update: 18

Select Records to Update

- Include Original (Quote not related to another Quote)
- Include Exported
- Include Primary Quotes
- Include Related Quotes

Select Fields to Update

- Sold To Address
- Ship To Name & Address
- Salesperson Commission Split %
- Telephone 1
- Email
- Salesperson 1
- Salesperson 2

Preview List: Only includes Quotes if Quote data (Sold To Address, Ship To Name, Ship To Address, Telephone 1, Email, Salesperson 1, Salesperson 2) does not match Customer data.

Quote	Customer Name	Address 1	Sold To Address 2	City	State	Zip	Name	Address 1	Ship To Address 2	City	State	Zip	Telephone 1	Em
ES703874	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST STREET		PELL CITY	AL	11111	2057654321	rfm
ES703875	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST STREET		PELL CITY	AL	11111	2057654321	rfm
ES703876	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST STREET		PELL CITY	AL	11111	2057654321	rfm
ES703890	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST STREET		PELL CITY	AL	11111	2057654321	rfm
ES810021	TEST, CMM	123 TESTING AV		TUSCALOOSA	AL	35405	TEST, CMM	123 TESTING AV		TUSCALOOSA	AL	35405		test
ES9 0053	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	rfm
ES702967	AMERICAN CHOICE REA	P.O. BOX 2213		TUSCALOOSA	AL	35403							205-758-2163	test
ES9 0013	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	sse
ES9 0014	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	sse
ES9 0015	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	rfm
ES9 0016	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	rfm
ES9 0023	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	sse
ES9 0037	EMPLOYEE, TEST	58 STANDING PI		NORTHPORT	AL	354	EMPLOYEE, TEST	58 STANDING PI		NORTHPORT	AL	354	2053331721	sse
ES901638	AMERICAN CHOICE REA	P.O. BOX 2213		TUSCALOOSA	AL	35403							205-758-2163	test
ES9 0047	ON TOP OF THE WORLD	123 CC ROAD		ATHENS	AL	35611	ON TOP OF THE WORLD	123 CC ROAD		ATHENS	AL	35611		test
ES9 0050	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	DOCUMENT, TECHNICA	145 TEST ROAD		PULASKI	TN	38478	2057654321	rfm
ES800705	AMERICAN CHOICE REA	P.O. BOX 2213		TUSCALOOSA	AL	35403							205-758-2163	test
ES901706	AMERICAN CHOICE REA	P.O. BOX 2213		TUSCALOOSA	AL	35403							205-758-2163	test

Confirm Match Update

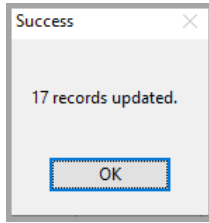
This will globally update customer information for Quotes.

If you have a recent backup and would like to continue, select YES. Otherwise, select NO.

This change is not reversible. Continue?

Yes No

A message will appear listing how many updates were made.



If a change is made to the Customer Record from this screen and then the change needs to be made on Quotes or Estimates, the screen must be exited and reentered to be able to make that change.

If "Sold To Address" and "Ship To Name & Address" are checked under Select Fields to Update, this routine will update the information regardless of the Sold To being locked or *Allow Edit of Ship* To being set to No.

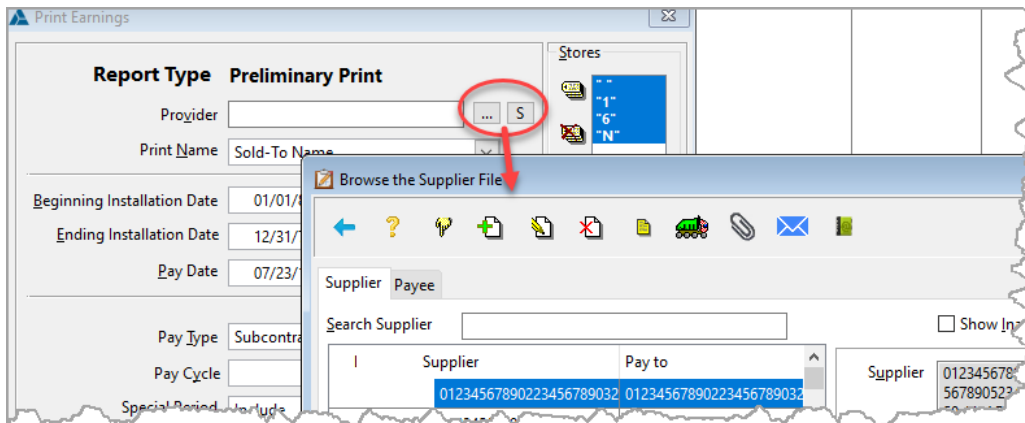
Reports

Provider Earnings

Order Entry>Reports>Provides Earnings

The ability to search for a single provider by using F8 has been added. Only providers that have unpaid records will be seen in the dropdown. If the field is left blank, it will include all Providers.

Suppliers can be selected by clicking the S button.

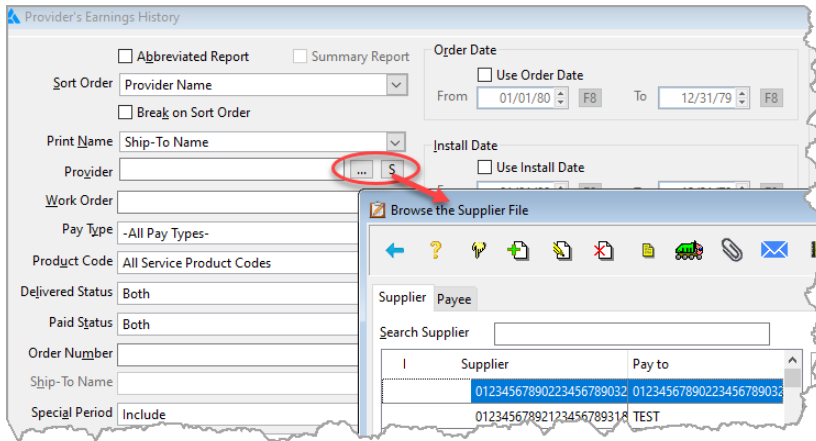


Provider's Earnings History

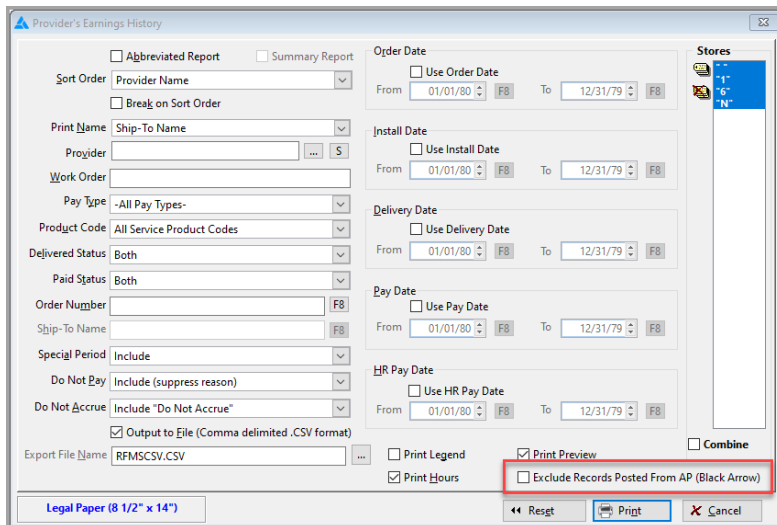
Reports>Provider's Earnings History

The ability to search for a single provider by using F8 has been added. If the field is left blank, it will include all Providers.

Suppliers can be selected by clicking the S button.



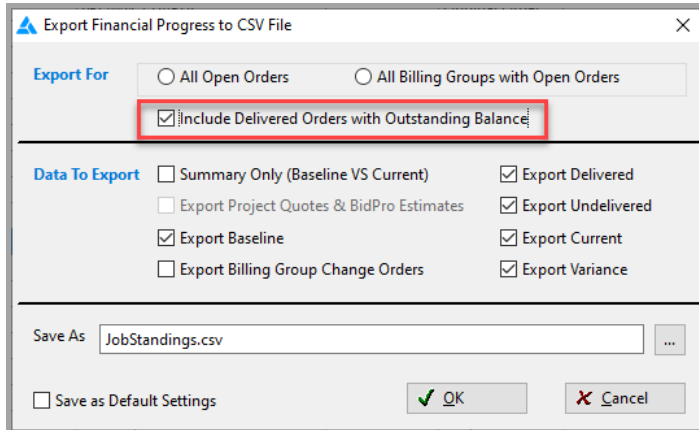
A checkbox has been added to include or exclude records posted from AP. Checking this box will exclude records from that report that came from the Black Arrow in AP.



Export Financial Progress Data to CSV

Reports>Export Financial Progress Data to CSV

A checkbox for “Include Delivered Orders with Outstanding Balances” has been added to the screen. This allows the user to determine if delivered orders with an outstanding balance will be treated as open order and included in the report.



Utilities

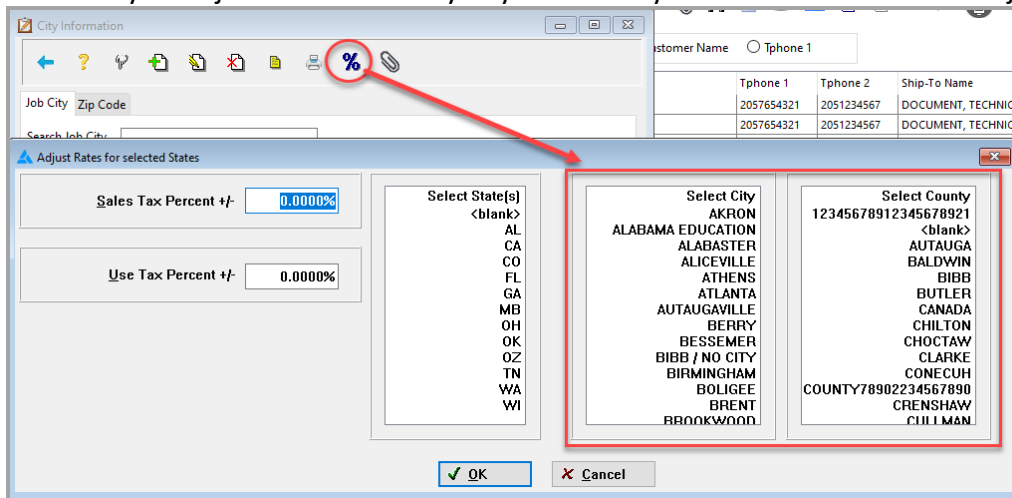
Setup

All the options under Setup have been reorganized to make the selection more convenient.

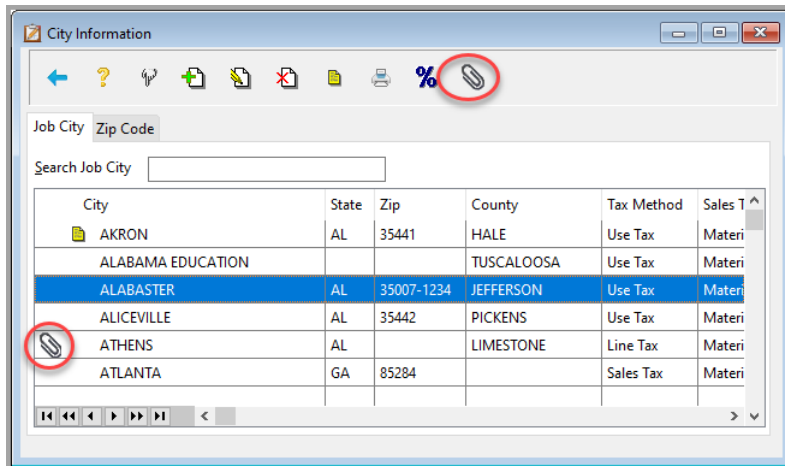
Cities

Utilities>Setup>Cities

The ability to adjust the tax rate by city and county has been added to the Adjust Rates screen.



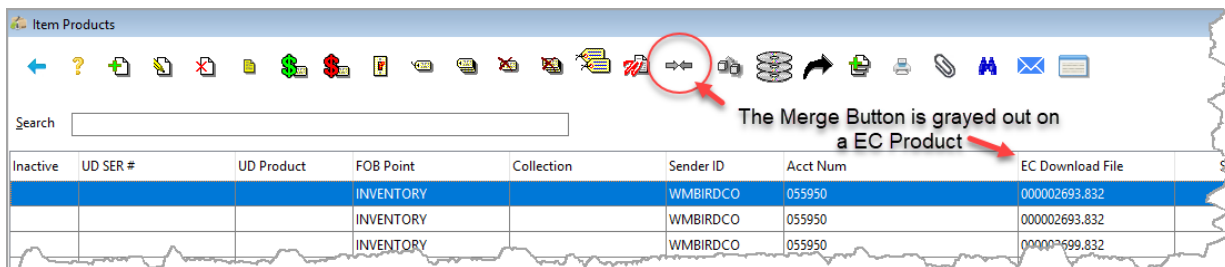
The ability to add attachments to a city have been added to the City Information screen.



Products

General

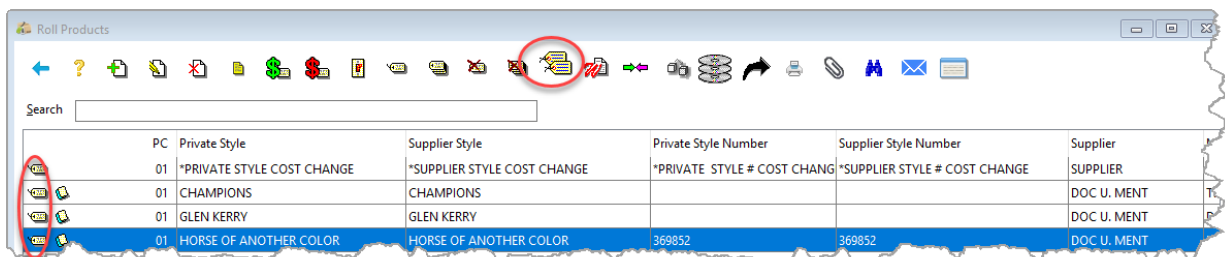
The ability to merge products to or from an EC Product has been removed as much of the information on EC Products.



Roll Products/ Item Products

View Only Tagged Records

The View Only Tagged Records button has been added to the Roll Products toolbar. If clicked, it will display only the tagged records.



Maintain Products

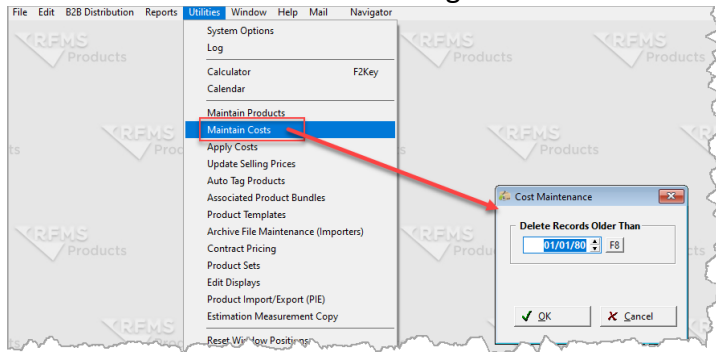
Utilities>Maintain Products

Color deactivation has been removed from this routine. Colors must be removed manually by running Apply Deactivation for colors.

Maintain Costs

Utilities>Maintain Costs

Maintain Costs has been added to the Utilities screen. This feature can remove old records from the Prodcost file based on a given date.



Product Templates

Utilities>Product Templates

The Roll Default Quantity has been removed from the Product Template Information screen.

Product Import/Export (PIE)

Utilities>Product Import/Export (PIE)

The amount of characters allowed in the Import File Name has been increased.

Inventory

Purchase Orders

Stock Purchase Orders for ALL Products except EC will print the Store Ship To address. If the Store Code does not have a Ship To address or an Additional Ship To address set up, then the Store Address will be used.

EC PO Printing will print the Ship To from EC ship file unless a Ship To has been entered.

The Add/View/Edit Ship To button will be red if the Purchase Order is an EC Purchase Order. It now turns red because it is populated with the hard-coded information from EC.

Purchase Orders

Search

PO # - Line #	Ordered	SC	PC	Supplier	Status	Private Style / Name	Private Color / Description	Promise Date	Length	Qty-Ord
#ST05799-0003	02/18/05	**	08	SOUTHERN WHOLESALE	Open	PATCH-MAPEI	PLANIPATCH-ADDITIVE	02/22/05	0.00	16.00
#ST05810-0001	02/24/05	**	08	SPACE FLOORING	To Be Ordered	SEAM SEALER-PARABON	M-4263		0.00	1.00
#ST08577-0001	07/03/14	**	02	THE R.A. SIEGEL COMPAN	To Be Ordered	ABERDEEN AXIS 12 FT	CARSWELL CLOVE / AX021		9.00	12.00
#ST08579-0001	08/20/14	**	01	SUPPLIER	To Be Ordered	PRIVATE STYLE	PRIVATE COLOR		1.00	1.33
#ST08604-0001	01/05/15	**	01	SUPPLIER	To Be Ordered	PRIVATE STYLE	PRIVATE COLOR111111111111	01/05/15	10.00	13.33

The Reference Number field has been added to RFMS Smart Search.

Purchase Orders

Search **KANSAS**

PO # - Line #	Ordered	SC	PC	Supplier(+)	Status	Private Style / Name	Private Color / Description	Promise Date	Length	Qty-Ord	Qty-Rcvd	Unit Cost	Total Cost
#ST08959-0001	05/22/19	**	01	DOC U. MENT	To Be Ordered	HORSE OF ANOTHER COLOF	GLINDA		10.00	16.67	0.00	\$15,000.00	\$250,000.00

Supplier: Phone, Account # 9999999999999999, E-Mail

Manufacturer: EMERALD CITY INC, Private Supplier: DOC U. MENT, Style: HORSE OF ANOTHER COLOR, Color: GLINDA, Roll #: #ST089590001, SKU

Units: SY, Length: 10.00, Qty: 16.67, Unit Cost: \$15,000.00, Total Cost: \$250,000.00, FOB

Ordered By: *AUTO GENERATED, Taken By, Promise Date, UD ED Date, Sidemark: TEST/ Stock, Reserve/Contract#, Sales Rep #1, Sales Rep #2

Comments: Reference # **KANSAS**

If the product code is changed from Roll to Items when inserting a new purchase order, the unit of measure is blanked out.

A Work Order Areas button has been added to the Add/Edit Purchase Orders screen.

Changing Purchase Order # #ST08755 Line # 0001

PO Line # #ST08755-0001, Order Date 03/30/16, Store Code FN, FB

Product Code 01, FB

Manufacturer: MANUFACTURER*, Supplier: DOC U. MENT, Private Supplier: PRIVATE SUPPLIER, Private Style: PRIVATE STYLE.2, Private Color: PRIVATE COLOR, Style: PRIVATE STYLE.2, Color: PRIVATE COLOR, Units: SY, FB, Roll #: CG6025742, Style #: PRIVATE STYLE # 2, Priv Style #: PRIVATE STYLE # 2, Color #: PRIVATE COLOR #, Priv Color #: PRIVATE COLOR #, UD SER #, SKU, FOB, Req Dye Lot, Collection, Priv Collection, Builder, Subdivision, Block

Width: 12.00, Length: 500.00, Roll/Cut: Cut, Cost: \$1,350.0000, Amt Ord: 666.67, Amt Rcvd: 666.67, Min Len: 0.00, Max Len: 0.00, Roll Qty: 0, Same Dye Lot

Ordered By: K, Taken By: D

Unit	Promise Date	Length	Qty-Ord	Qty-Rcvd	Unit Cost	Total
	01/27/16	150.00	200.00	200.00	\$5.9400	\$1,118.00
	03/30/16	500.00	666.67	666.67	\$1,350.0000	\$900,000.00
	03/30/16	510.00	680.00	680.00	\$1,350.0000	\$918,000.00
	04/11/16	150.00	200.00	200.00	\$5.9202	\$1,184.04
		50.00	66.67	66.67	\$1,350.0000	\$900.00
	04/29/16	500.00	666.67	666.67	\$1,500.0000	\$1,000,000.00
		2.00	48.00	0.00	\$9,999.9990	\$479,991.60
	05/18/16	20.00	1.00	1.00	\$250.0000	\$250.00
		0.08	20.00	0.00	\$8.4600	\$1,672.08
	05/30/16	9.00	12.00	12.00	\$5.9400	\$71,280.00
		2.00	48.00	0.00	\$9,999.9990	\$479,991.60
	05/19/16	10.00	13.33	13.33	\$5.9400	\$78,852.00
	05/20/16	0.00	50.00	50.00	\$150.0000	\$7,500.00

Work Order Areas

Area	Style	Color	Width	Length	Qty	PC	Ino Num	Line Num	Line Status
B1	PRIVATE STYLE.2	PRIVATE COLOR	12	500	666.67	01	CG602574		

OK Cancel

When editing a Purchase Order, The Tiered Cost button text will be in red if there is a Tiered Cost associated with the product.

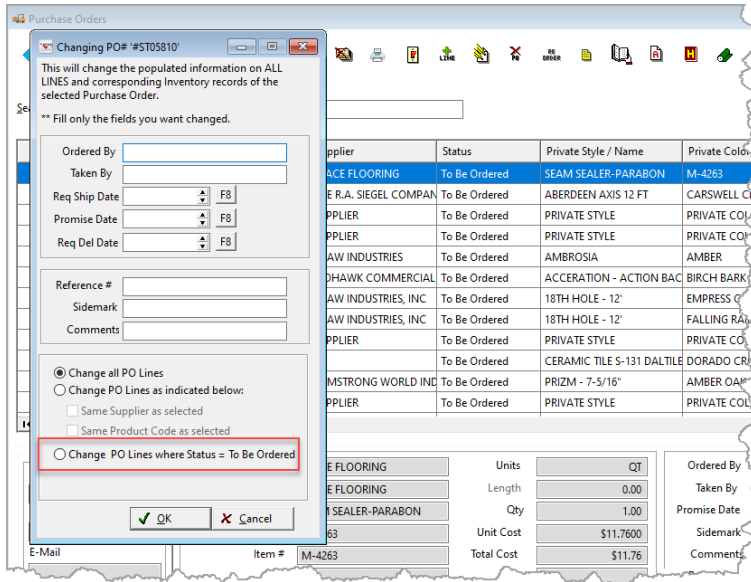
The screenshot shows a software window titled "Inserting Purchase Order # Line # 0000". It contains several sections of data entry fields:

- PO Line #**: []
- Order Date**: 08/14/19
- Store Code**: -- F8
- Product Code**: 06 F8 CERAMIC
- Manufacturer**: TEST
- Supplier**: DOC U. MENT F8
- Private Supplier**: DOC U. MENT F8
- Item #**: WEBINAR TEST
- Name**: THE PATRIOT
- Description**: REDCOATS
- UD SER #**: []
- Units**: BX F8
- Description #**: []
- Priv Item #**: WEBINAR TEST F8
- Priv Name**: THE PATRIOT F8
- Private Desc**: REDCOATS
- Private Desc #**: []
- Item Size**: 1X1
- SKU**: []
- FOB**: []
- Req Dye Lot**: []
- Collection**: []
- Priv Collection**: []
- Builder**: []
- Subdivision**: []
- Block**: []
- Lot**: []
- Width**: 1.00
- Length**: 1.00 F8
- Roll/Cut**: []
- Cost**: \$250.0000 F8
- Amrt Ord**: 0.0000 BX
- Amrt Rcvd**: 0.0000
- Footage Order**: Define Cuts
- Roll Order**: Min Len: 0.00, Max Len: 0.00
- Roll Qty**: 0
- Same Dye Lot**:
- 1X1**: There are 100 BX per BX. This PO is for 0 BX.
- Ordered By**: SSENTELL
- Taken By**: []
- Requested Ship Date**: [] F8
- Promise Date**: [] F8
- Requested Del Date**: [] F8
- Reserve/Contract #**: []
- Status**: []
- Total Value**: \$0.00
- Reference #**: []
- Sidemark**: []
- Comments**: []
- Sales Rep #1**: []
- Sales Rep #2**: []
- UD ED Date**: [] Printed: 0
- Manf SKU**: []
- Freight Carrier**: []
- Tracking Number**: []

At the bottom, there are three buttons: "Tiered Cost" (highlighted with a red box), "OK" (with a green checkmark), and "Cancel" (with a red X).

Change Info on All Lines of the Selected PO

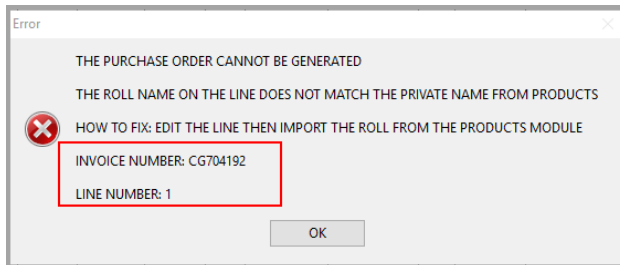
Change PO Lines where Status = To Be Ordered has been added as an option on the Changing PO screen. This gives the user the ability to only change the line in the Purchase Order that is in the To Be Ordered Status.



Auto PO

If an attachment has been added to an order line, it is now viewable on the Auto PO screen.

Invoice Number and Line Number are now indicated on Error Messages received when generating an Auto PO.



Receiving/Costing

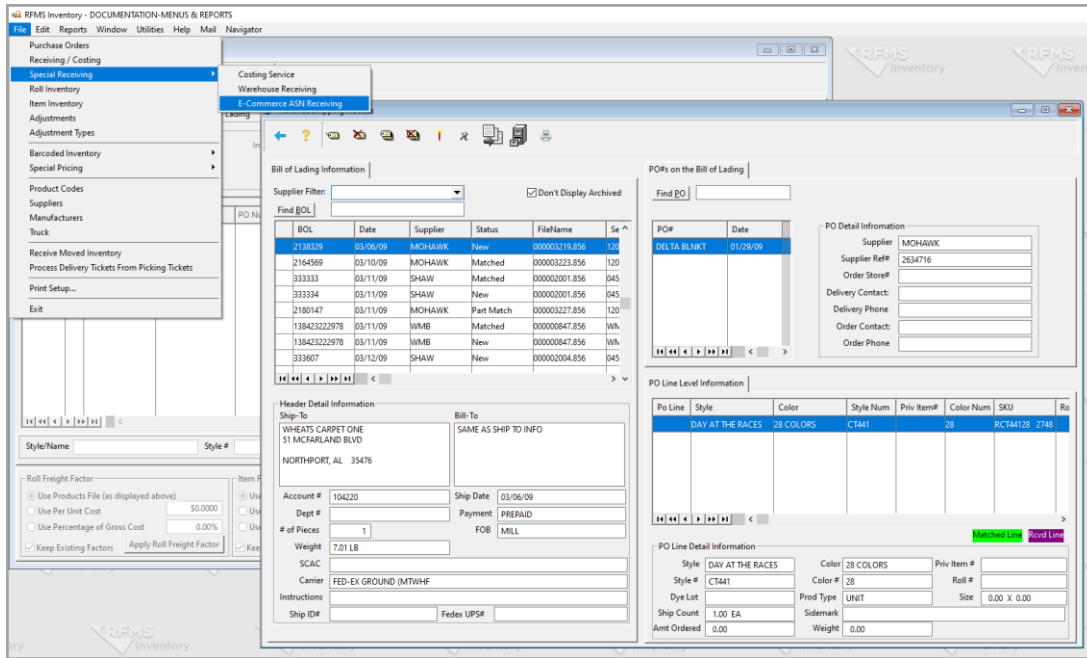
CTRL + T will move down to the next line when tagging during Receiving also.

Special Receiving

E-Commerce ASN Receiving

File>Special Receiving>E-Commerce ASN Receiving

The ability to Receive ASNs from the Inventory module has been added to the Special Receiving area.



Roll and Item Inventory

The On Order Date has been added to the browse screens.

Roll Inventory

Search: DOC U MENT

SC	PC	Roll #	Supplier	Style	Color	Dye Lot	Width	Beg Length	Used	Rsvd	Sft
"1"	01	CG7041020002	DOC U. MENT	*PRIVATE STYLE	NEW COLOR		12.00	10.00	10.00	0.00	0.00
"1"	01	CG7041020003	DOC U. MENT	*PRIVATE STYLE	NEW COLOR		12.00	10.00	10.00	0.00	0.00
"1"	01	CG7041020005	DOC U. MENT	*PRIVATE STYLE	NEW COLOR		12.00	10.00	9.25	0.75	0.00
" "	01	#ST086740001	DOC U. MENT	18TH HOLE - 12"	FALLING RAIN		12.00	500.00	35.00	25.00	0.00
"N"	01	CG115	DOC U. MENT	18TH HOLE - 12"	FALLING RAIN		12.00	0.00	-10.00	10.00	0.00
"N"	01	CG126	DOC U. MENT	18TH HOLE - 12"	FALLING RAIN		12.00	0.00	-1.00	1.00	0.00
" "	01	RFMS	DOC U. MENT	18TH HOLE - 12"	FALLING RAIN		12.00	150.00	1.00	0.00	0.00
"1"	01	CG169	DOC U. MENT	18TH HOLE - 12"	MUTINY		12.00	25.00	ON ORDER 11/03/14	0.00	0.00
"1"	01	CG55	DOC U. MENT	18TH HOLE - 12"	MUTINY		12.00	500.00	145.00	0.00	0.00
" "	01	CG55A	DOC U. MENT	18TH HOLE - 12"	MUTINY		12.00	0.00	0.00	0.00	0.00
"1"	01	TEST FOR STO	DOC U. MENT	18TH HOLE - 12"	MUTINY		12.00	25.00	ON ORDER 11/03/14	0.00	0.00
" "	01	CG56	DOC U. MENT	18TH HOLE - 12"	MUTINY	TEST FOR D	12.00	500.00	-445.00	0.00	0.00
" "	02	#ST087050001	DOC U. MENT	ABERDEEN AXIS 12 FT	ROCK ISLAND SEA SH		12.00	10.00	10.00	0.00	0.00

Load

The lock button will be locked as a default, and the ability to set a password on the lock button has been added.

Changing -- Roll# CG55A (Received from Invoice)

Store: F8
 Product Code: 01 CARPET
 Manufacturer: PHILADELPHIA COMMERC 40
 Supplier: DOC U. MENT F8
 Private Supplier: CARPET ONE F8
 PO #: #ST085940001 STOCK

Private Style: 18TH HOLE - 12' F8
 Private Color: MUTINY
 Priv Style #: 35422
 Style Type: TURF F8
 Priv Color #: 538423
 Color Type: F8
 Fiber Type: OLEFIN F8
 Quality: Mill Warranty F8
 Backing: 18X18 CLIPPED F8
 Dye Lot:
 Roll/Cut: Roll
 Pile Height: 0.3750
 Pile Weight: 0.0000
 Toxicity #:
 UD SER #:
 SKU:
 Manf SKU:
 Collection:
 Priv Collection:

Roll #: CG55A F8
 Date Rcvd: 10/29/14 F8
 Received By: N/A
 Invoice #: COST TEST
 Invoice Date: 05/13/16
 Location:
 Sidemark:
 Comments:
 Inventory User #: 0.00

Gross Cost: \$5.9202 F8
 Net Cost: \$5.9202
 Freight: \$0.0000
 Load: \$10.0000

Width: 12.00
 Beg Length: 0.00 0 SY
 Used: 0.00
 Reserved: 0.00
 Available: 0.00 0 SY

Unit Price: \$0.00 F8 C
 Initial Value: \$0.00

OK Cancel

Roll Core Tags

Starting printing position can now be chosen for the Roll Core Tags.

Print Roll Tags

Stores:
 Type: Roll Core Tags
 Preview
 Printer: hp LaserJet 1320 PCL 5
 Position Button
 Supplier Label:
 Manufacturer
 Supplier
 Private Supplier
 Price:
 Print Selling Price
 Print Cost Code
 Print Price Comparison
 Additional Options:
 Print Date Received
 Print Roll Tags Cancel

Select Starting Print Position

Laser

Position 1 Position 2
 Position 3 Position 4
 Position 5 Position 6
 Position 7 Position 8
 Position 9 Position 10
 Position 11 Position 12
 Position 13 Position 14
 Position 15 Position 16
 Position 17 Position 18
 Position 19 Position 20

Help OK

15.00	0.00	15.00	0.00	0.00	CG7040460005
15.00	15.00	0.00	0.00	0.00	ST0000050002
50.00	0.00	0.00	0.00	50.00	CG7040770001
15.00	15.00	0.00	0.00	0.00	CG7041200001

Backing: 18X18 CLIPPED

Reports

PO Reference Number Added to Reports

Reports > Roll Inventory Range Report or Item Inventory Range Report

The PO Ref Number has been added to the CSV for Roll Range Report, Item Inventory Range Report, Roll Inventory Information Report, and Item Inventory Information Report.

AC	AD	AE
Reserve A Load		PO Reference #
0	0	
0	0	
0	0	
0	0	

Roll Range Inventory Report

AJ	AK	AL
Private Cc Load		PO Ref Num
	0	
BCOE **	0	
-----	0	

Item Inventory Range Report

V	W	X
Backing	Quality	PO Reference #
A	None	12345678
		11058763
		11058763
		11058763

Roll Inventory Information Report

Q	R	S
Load	Grs Cost	PO Reference #
0	5.52	751035
17.4	325.13	S2222800
17.4	327.6	S2222800

Item Inventory Information Report

Needed Inventory Report

The PO Number has been added to the report and the CSV.

Page No: 1
04/17/19
9:29:22

DOCUMENTATION-MENUS & REPORTS
Reorder Level Report

Supplier: CARPET ONE						Unit	Re-O.
PC	Product	Item Number	Item\Style	Color	Color Num	Cost	Units
02	----		ABERDEEN AXIS 12 FT	PINECASTLE QUARRY / AX011	AX011	12.99	LF
	Store	Inventory Number		Dye Lot	PO Number	Date Rcvd	Reserved
	"1"	#ST088430001			#ST088430001	05/17/17	0.00
Supplier: DOC U. MENT						Unit	Re-Or.
PC	Product	Item Number	Item\Style	Color	Color Num	Cost	Units
06	FUSSQLAVA		FUSION LAVA BLEND 1/2X1/2 SQU/POLISHED & FROSTED GLASS		MEFUSSQLAVA	8.75	SH
	Store	Inventory Number		Seq#	Run Lot	PO Number	Date Rcvd
	" "	FUSSQLAVA		1		CG8 00690002	09/19/18

A	B	C	D	P	Q	R
Product C	Product D	Supplier	Store	rently	Reorder	PO Number
2 (VINYL)	CARPET O	"1"		0	500	#ST088430001
6 (CERAMIC	DOC U. M	" "		0	10	CG8 00690002
1 (CARPET)	LEE	"1"		0	1000	#ST088310001
1 (CARPET)	PRIVATE S	"1"		0	500	#ST089410001
1 (CARPET)	PRIVATE S	"1"		0	500	#ST089660001
1 (CARPET)	PRIVATE S	" "		10	500	#ST089110001
1 (CARPET)	PRIVATE S	"1"		0	500	#ST089410001

Item History Report

Reports>Item History Report

New-On Order and Sold-On Order have been added as Statuses.

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08/15/19
2:21:41PM

DOCUMENTATION-MENUS & REPORTS
Item History Report
Date Range:01/01/19 to 08/30/19

Transaction Name	Invoice Number	Transaction Date	Item Seq Number	Transaction Type	Unit Cost	P
KYSER CONSTRUCTION	CG400989	01/22/19	1	Sold	0.09	
* Totals For Item Number: ADH - SHAW 1						5.3
* Transactions For Item Number: BEAUFORTTRAD						
SOUTHERN WHOLESALE		01/03/19	2	New - On Order	10.00	
BROWN, CHARLIE	ST000068	01/03/19	2	Sold - On Order	10.00	
* Totals For Item Number: BEAUFORTTRAD						
* Transactions For Item Number: BRONZE-7/16						

Inventory Adjustments Report

Reports>Inventory Adjustments Report

A Print Preview option has been added.

Inventory Adjustments Report

Stores: "1", "6", "N"

Start Date: 01/01/80 F8
End Date: 12/31/79 F8
Supplier: F8
Adjustment Type: All Types

Sort By:
 Adjustment Date
 Product Code
 Adjustment Type

Print Options:
 Print by Store
 Print Summary
 Include Transfers
 Use greenbar printout
 Print Preview
 Output CSV To: RFMSCSV.CSV

Prints on 8.5 x 14 Paper (Legal) [Print] [Cancel]

Roll Inventory Physical Report and Item Inventory Physical Report

Reports>Roll Inventory Physical Report or Item Inventory Physical Report

The PO Number has been added to the Roll and Item Inventory Physical Report.

DOCUMENTATION-MENUS & REPORTS
PHYSICAL INVENTORY REPORT
 SORT ORDER: ITEM NUMBER DATE RANGE: 01/01/19 to 12/31/19

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08/08/19
11:10AM

PC	Item Number	Name / Description	Run Lot / Sidemark		Amt Available	Phy Amt	Units	Location	Qty on Hand
Store: ""									
07	CRH05WH1S	CASTLE ROCK OAK WHEAT	DELETE	PO Number CG9 01140003	387.51	387.51	SF		
07	SW180	SLEEPY HOLLOW - 3-1/4", 5" HORSEMAN		PO Number CG8 00340003	0.00	59.40	SF		
08	ADH - SHAW 1000	ADH - SHAW 1000	CG400989	PO Number CG4009890005	0.00	5,800.02	SF		
10	1776	AMERICAN PATRIOT STATUE OF LIBERTY	MENT. DOC U.	PO Number ST0000180001	61.00	61.00	EA		
10	987450	MUNCHKIN LAND LULLABY LEAGUE		PO Number CG9 01400001	75.00	75.00	EA		
10	TEST3	AMERICAN PATRIOT ROWDY RED	DELETE	PO Number CG9 01140001	61.00	61.00	EA		

A	B	C	L	M	N
Store	Number	Style	Dye Lot	Sidemark	PO Number
" "	CG162	MY ST		UNREFERE	CG8 00760006
" "	CG177	LEGO			#ST089860002
" "	CG704046	BLAC			CG7040460005
"1"	#ST089480	CHATS	YE		#ST089480001
"1"	CG163	*PRIV			#ST089410001

A	B	C	J	V	W	X
Store	Product C	Item Num Na	In Qt	Item Leng	Item Width	PO Number
" "	7	CRH05WH CA	0	0	0	CG9 01140003
" "	7	SW180 SW	19.8	1	0.66	CG8 00340003
" "	8	ADH - SHA	0	0	0	CG4009890005
" "	10	1776	76	8	10	ST0000180001

Stock Status Report

Reports > Stock Status Report

GenPO has been added as a status in the Sold (From Lines) section of the report.

DOCUMENTATION-MENUS & REPORTS
STOCK STATUS REPORT

Page No: 1
08/14/19
12:08PM

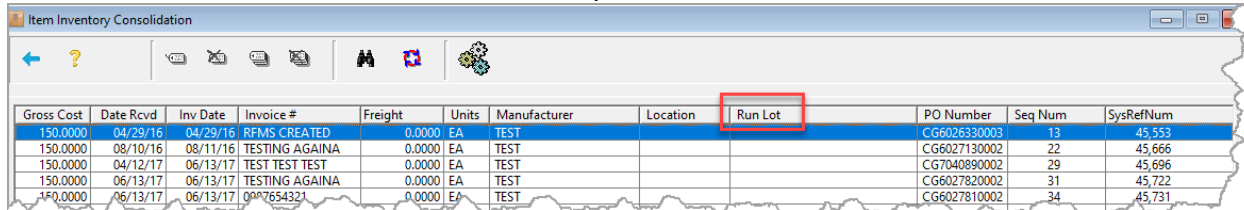
On Hand	Sold	Stock Position	On Order		
Pr Code: 01 578.00 SY	Style: *PRIVATE STYLE 540.33 SY	35.67	Color: PPRIVATE COLOR 0.00		
On Hand (From Inventory)					
Pr Code	Store	Location	Roll/Item Number	Dye/Run Lot	Quantity
01	"1"		CG143		13.33 SY
01	"1"	LOCATION	CG140		552.67
01	"1"		CG142		10.00
On Order (From Purchase Orders)					
PO Number	Store	Order Date	Promise Date	Quantity	
Sold (From Lines)					
Store	Invoice #	Customer	Est Del Date	Line Status	Quantity
" "	CG710014	CUSTOMER LAST NAME, CUSTOMER F		Gen PO	10.00
" "	CG704183	CUSTOMER LAST NAME, CUSTOMER F		Gen PO	1.00
" "	CG704207	CONSTRUCTION CUSTOMER		None	13.33
" "	CG704208	CONSTRUCTION CUSTOMER		None	13.33

Utilities

Item Inventory Consolidation Tool

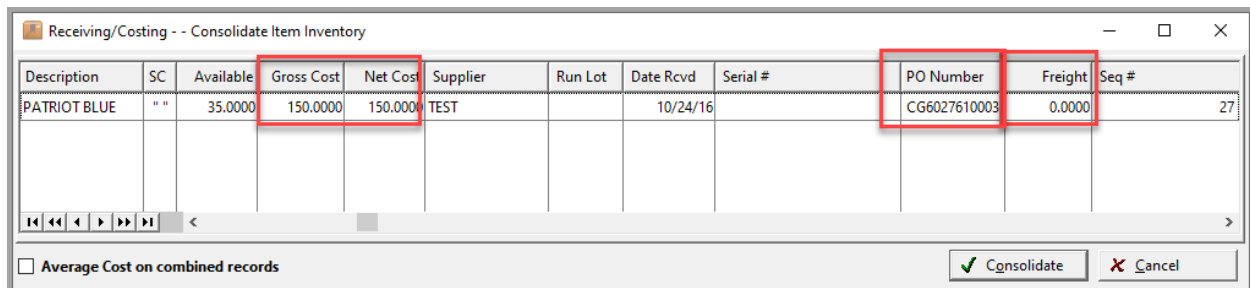
Utilities>Item Inventory Consolidation Tool

Run Lot has been added to the Item Inventory Consolidation Browse Screen.



Gross Cost	Date Rcvd	Inv Date	Invoice #	Freight	Units	Manufacturer	Location	Run Lot	PO Number	Seq Num	SysRefNum
150.0000	04/29/16	04/29/16	RFMS CREATED	0.0000	EA	TEST			CG6026330003	13	45,553
150.0000	08/10/16	08/11/16	TESTING AGAINA	0.0000	EA	TEST			CG6027130002	22	45,666
150.0000	04/12/17	06/13/17	TEST TEST TEST	0.0000	EA	TEST			CG7040890002	29	45,696
150.0000	06/13/17	06/13/17	TESTING AGAINA	0.0000	EA	TEST			CG6027820002	31	45,722
150.0000	06/13/17	06/13/17	0907654321	0.0000	EA	TEST			CG6027810002	34	45,731

Consolidate Item Inventory screen now displays 4 decimals for cost. A PO Number column and a Freight column have been added.



Description	SC	Available	Gross Cost	Net Cost	Supplier	Run Lot	Date Rcvd	Serial #	PO Number	Freight	Seq #
PATRIOT BLUE	" "	35.0000	150.0000	150.0000	TEST		10/24/16		CG6027610003	0.0000	27

Average Cost on combined records

Inventory Move

Requested Inventory Screen

If there is an Inventory record that no longer meets the requested criteria, then the requested flag on the line will be released, and it will return to a regular reserve.

Accounting

Dates

If J is pressed while in a date field in the Accounting module, the last Journal Closed date will be populated in that field.

Accounts Receivable

Statements

Print Statements

Files>Accounts Receivable>Statements>Print Statements

If selected from the Statements print screen, the Order Due Date will now print on Statements.

The 'Statements' dialog box includes the following sections:

- Date:** 07/01/19
- Starting Name:** [F8]
- Ending Name:** [F8]
- Stores:** [List of store codes]
- Customer Types:** ARCHT/SPECIFR, BUILDER/GEN CON, CARPET DEALER, CLAIMS-REPAIR, CLAIMS-REPLACE, CLAIMS-RETURN, CLEANER/RESTORE, CONSUMER CLUB, CORPORATIONS, DESIGNER, DOCUMENTATION, INSTALLER, NA: BUTLER, NA: HBTC, NA: HOUSE DOC, NA: SERVPRO, NA: UBUILDIT, PAINT CONTRACT, PROPERTY MANGR, REAL EST BROKER, REMODELER, RETAIL STORE.
- Aging From:**
 - Current
 - 30 Days Or Greater
 - 60 Days Or Greater
 - 90 Days Or Greater
- Description To Use:**
 - Ship To Name
 - Sold To Name
 - UD JOB #
 - Po Number
 - Ship To Addr1
- Print Options:**
 - Print Preview
 - Print Sales Rep.
 - Exclude Credit Balances
 - Print By UD Main
 - Print Due Date**
 - Output CSV To: [RFMSCSV.CSV]
- Sort Order:**
 - Print All (No Email)
 - Invoice Number
 - Order Date
- Printing Format:**
 - Plain Paper
 - Letterhead
 - Use Store Code Name
 - Use #9 Double Window Envelope
- Copies:** 1
- Buttons:** Options, OK, Cancel

STATEMENT
DOCUMENTATION COMPANY
100 MENY ST
ANNANDALE, VA 22003
5092 131400

July 01, 2019
Page No. 1
Balance Due 7,977.19

Transaction	Balance Date	Invoice Number	Description	Due Date	Charges	Credits	Other Adj.	Balance
	06/18/19	CG602116	MENT EDOC U	06/18/19	3,122.00	100.00	0.00	3,022.00
	06/18/19	CG602141	MENT EDOC U	06/18/19	4,857.50	477.77	0.00	4,380.00

This is a message that prints on the last page of the statement and is set up under Options on the Print Statements screen.

Current	Past Due 30 Days	Past Due 60 Days	Past Due 90 Days	Amount Due
7,977.19	0.00	0.00	0.00	7,977.19

Mult-Pay

File>Accounts Receivable>Multiple Payments

The Skip Check Number button on the Check Number message screen can now be password protected.

The 'Multiple Invoice Payment' screen shows:

- Customer:** DOCUMENT, TECHNICAL
- Selection:** Invoice
- Include on Hold:**
- Delivered:** 07/31/19
- Table:**

Billed Date	Delivery Date	Order Date	Order Number	Balance Due	PO Number	Count	Tagged
05/17/17	05/17/17	05/17/17	CG602736	4,125.00		2	2
07/16/19	07/16/19	07/16/19	CG602636	200.55			
- Totals:** Register: 001 - CASH/CHECKS (Store: *1*)
- Discount Act:** 405 DISCOUNTS TO CUSTOMER

The 'Check Number' dialog box contains:

You have specified a Check Amount, but not a Check Number

Buttons: Add Check Number, **Skip Check Number**

Last Payment/High Credit

File>Accounts Receivable>Last Payment/High Credit

A discount is now marked as a discount instead of a payment.

Date	Type	Amt	Balance
01/11/18	Charge	4,086.20	3,977.90
02/09/18	Payment	5,664.83	-1,686.93
04/17/18	Payment	10.00	-1,696.93
04/19/18	Payment	300.67	-1,997.60
05/22/18	Charge	0.00	-1,997.60
12/27/18	Payment	-823.61	-1,173.99
02/15/19	Charge	9,151.18	7,977.19
06/18/19	Charge	825.00	8,802.19
06/18/19	Discount	75.00	8,727.19
06/18/19	Payment	750.00	7,977.19

Accounts Payable

The AP Detail Comment has been increased to 75 characters.

SC	Account Code	Sub	Amount	Comment
	699	00	30.00	4567893123456789412345678951234567896123456789712345

DOCUMENTATION-MENUS & REPORTS
Filtered Journal

Page No: 1
05/07/19
01:15PM

Trans Date	Account	Sub	Store	Description	Comment	Batch	AP Detail Comment	Debit	Credit
05/07/19	201	00	"1"	DOC U. MENT	ADD PAYABLE	19,747		0.00	30.00
05/07/19	699	00	"1"	DOC U. MENT	ADD PAYABLE	19,747	1234567891123456789 2123456789312345678 9412345678951234567 896123456789712345	30.00	0.00
09/09/24	201	00	" "	LOWES	ADD PAYABLE	4,795		0.00	110.54
09/09/24	201	00	" "	LOWES	EDIT PAYABLE	4,804		0.00	110.54

Suppliers

The Payee field has been increased to 80 characters.

When Inactive Suppliers are included, they are now grayed out on this screen.

Suppliers

Supplier Payee

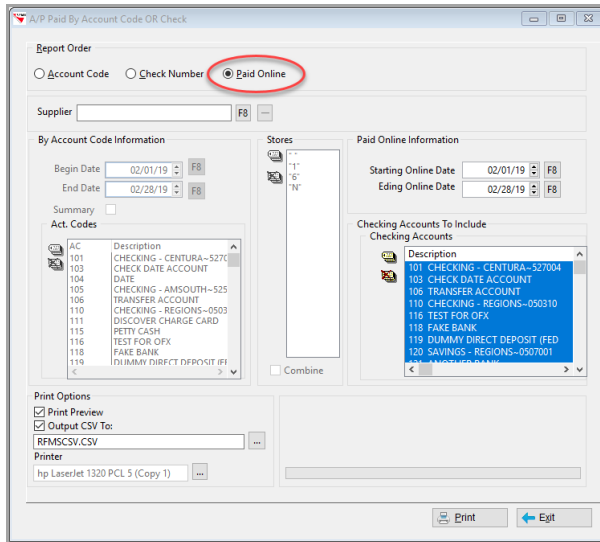
Search Supplier Exclude Inactive

Supplier	Payee	Supplier Contact
1099 SUPPLIER	1099 SUPPLIER	
1099 SUPPLIER NEW	1099 SUPPLIER NEW	
80-4567890223456789032345678904234567890123456789022345678904234567890	80-456789022345678903234567890	
828 INTERNATIONAL TRADING	828 INTERNATIONAL TRADING CO.	
84 LUMBER COMPANY	84 LUMBER COMPANY	
A & L REPAIR CENTER	A & L REPAIR CENTER	
A&A GLOBAL	A&A GLOBAL	ELLEN FELTS 404-725-1551
A-1 SHARPENING SERVICE	A-1 SHARPENING SERVICE	
A1 ALABAMA KEY	A1 ALABAMA KEY & LOCKSMITH INC	
AAA COOPER	AAA COOPER	

A/P Reports

A/P Paid by Account Code or Check

The ability to print the report in order by Paid Online has been added.

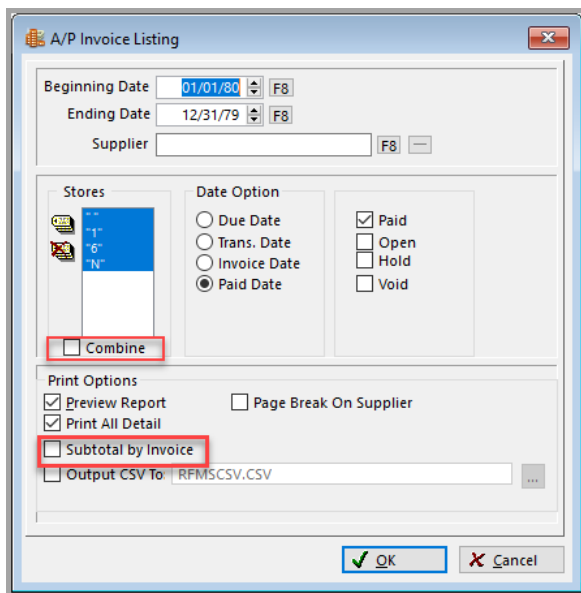


A/P Invoice Listing Report

File>Accounts Payable>A/P Reports>A/P Invoice Listing.

A Combine Stores checkbox has been added to the AP Invoice Listing Report.

Break on Invoice is now Subtotal by Invoice.



A/P Invoice Listing Report now shows the subtotal for each store.

Page No. 1
05/20/19
12:49PM

RFMS SCHOOL
A/P LISTING BY SUPPLIER

Supplier	Inv. Number	Inv. Date	Due Date	Pay Date	Chk. Number	Amount	Status	Store	Act. Code	Sub
FOGBUZZ	8215E	08/02/18	09/01/18			3,800.00	Open	"C"	140	01
						3,800.00				
PAYROLL TAX SUPPLIER	040519-C	04/05/19	04/05/19			24.85	Open	"C"	220	00
PAYROLL TAX SUPPLIER	040519-C	04/05/19	04/05/19			12.40	Open	"C"	221	00
PAYROLL TAX SUPPLIER	040519-C	04/05/19	04/05/19			2.90	Open	"C"	222	00
PAYROLL TAX SUPPLIER	040519-C	04/05/19	04/05/19			15.30	Open	"C"	585	00
						55.45				
SHAW INDUSTRIES	41819	08/31/18	09/15/18			1,198.08	Open	"C"	140	01
						1,198.08				
						4,853.53				
						Sub Total For Store "C"				
PAYROLL TAX SUPPLIER	040519-P	04/05/19	04/05/19	04/20/19	254	24.88	Paid	"P"	220	00
PAYROLL TAX SUPPLIER	040519-P	04/05/19	04/05/19	04/20/19	254	12.40	Paid	"P"	221	00
PAYROLL TAX SUPPLIER	040519-P	04/05/19	04/05/19	04/20/19	254	2.90	Paid	"P"	222	00
PAYROLL TAX SUPPLIER	040519-P	04/05/19	04/05/19	04/20/19	254	15.30	Paid	"P"	585	00
						55.48				
						Sub Total For Store "P"				
						55.48				
FOGBUZZ	081718	08/17/18	09/16/18			10,800.00	Open	"R"	140	01
FOGBUZZ	37457	09/07/18	10/07/18			3,800.00	Open	"R"	140	01
FOGBUZZ	822018	08/02/18	09/01/18			3,800.00	Open	"R"	140	01
						18,200.00				
PAYROLL TAX SUPPLIER	040519-R	04/05/19	04/05/19			24.88	Open	"R"	220	00
PAYROLL TAX SUPPLIER	040519-R	04/05/19	04/05/19			12.40	Open	"R"	221	00
PAYROLL TAX SUPPLIER	040519-R	04/05/19	04/05/19			2.90	Open	"R"	222	00
PAYROLL TAX SUPPLIER	040519-R	04/05/19	04/05/19			15.30	Open	"R"	585	00
						55.48				
						Sub Total For Store "R"				
						19,255.48				
						Grand Total				
						23,164.43				

AP Aging

The Due Date field has been added to the CSV file.

	A	B	C	D	E	F	G	H	I	J
1	Supplier	Due Date	Inv Date	Inv Numb	Range 1	Range 2	Range 3	Range 4	Balance	Store
2	DOC U. MI	20180430	20180430	PFP123	0	0	0	20	20	" "
3	DOC U. MI	20180919	20180919	FF456	0	0	0	625	625	" "
4	DOC U. MI	20180919	20180919	FF765	0	0	0	145	145	" "
5	DOC U. MI	20180919	20180919	FF876	0	0	0	250	250	" "
6	DOC U. MI	20180919	20180919	FF876	0	0	0	142.5	142.5	" "
7	DOC U. MI	20181003	20181003	RC	0	0	0	5000	5000	" "
8	DOC U. MI	20180919	20180919	FF654	0	0	0	67500	67500	"1"
9										
10										

General Ledger

The comment field in the Journal has been increased to 75 characters.

Chart of Accounts

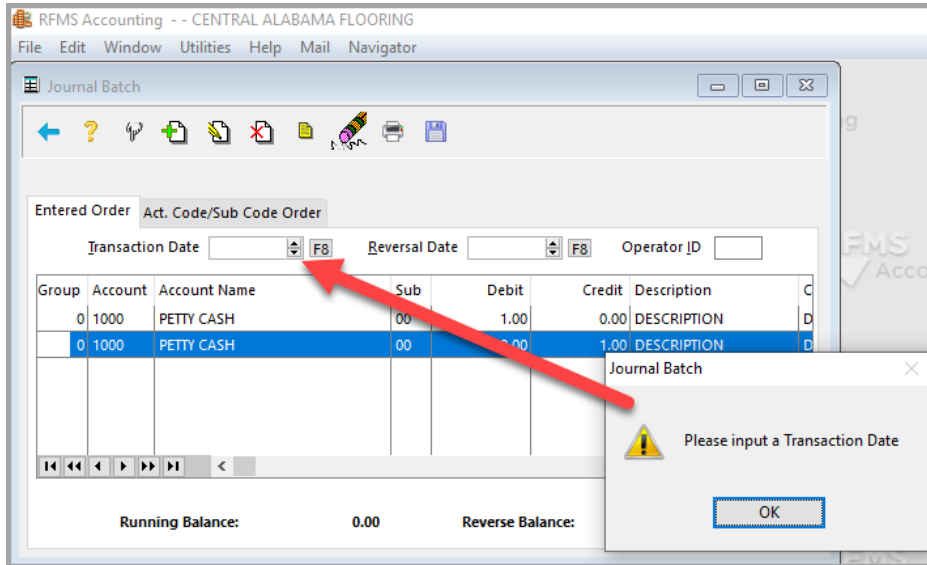
File>General Ledger>Chart of Accounts

The columns size in the Chart of Accounts browse screen is now adjustable.

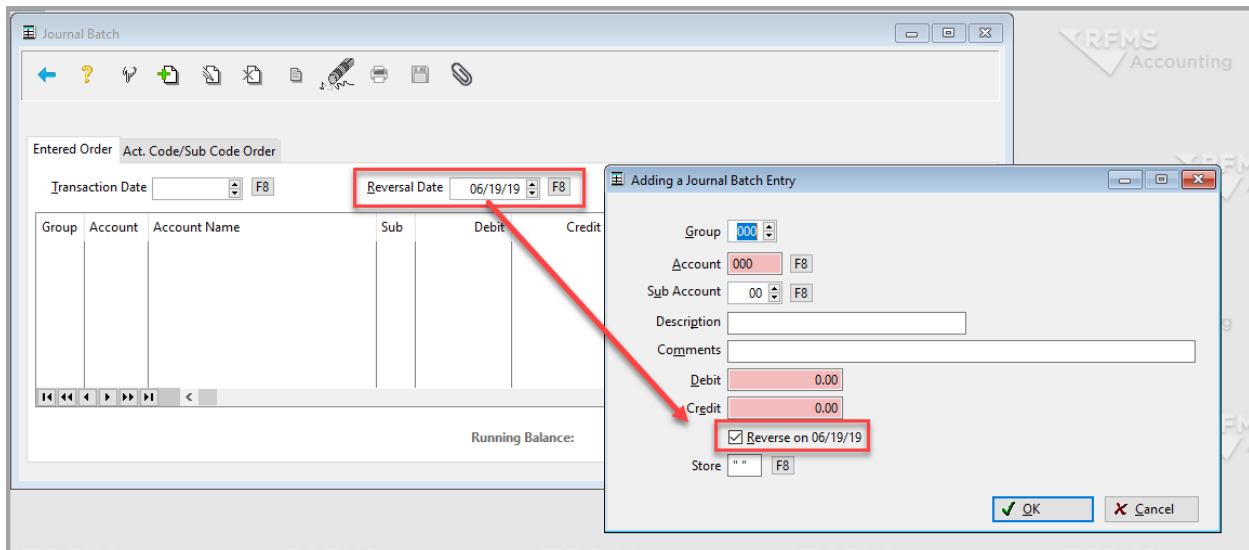
Journal Batch Entries

File>General Ledger>Journal Batch Entries

The Transaction Date defaults to blank and is now required.



If a reversal date is entered, then the reverse checkbox is checked by default for each transaction when it is being added.

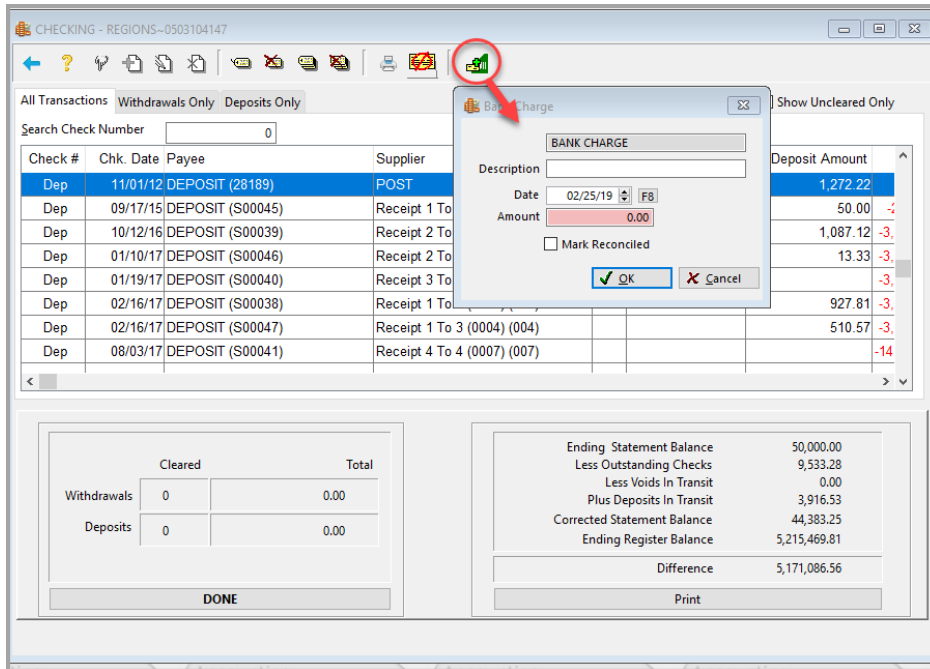


Banking

Reconcile Register

File>Banking>Reconcile Register

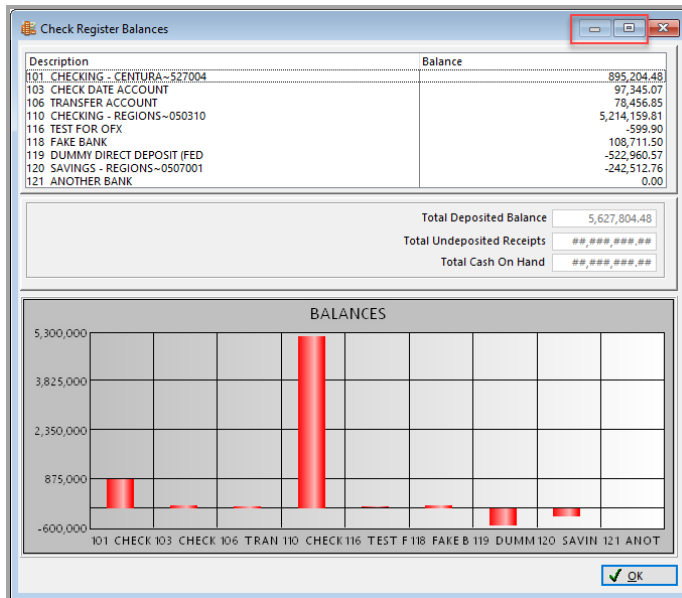
The ability to add a bank charge during reconciliation has been added.



Show Bank Balances

File>Banking>Show Bank Balances

The Show Bank Balances screen is now a re-sizable window.



Sales Commission

Store Code and Customer Type

Store Code and Customer Type have been added to the CSV for Print Commissions, Print and Post Commissions, and Print Commission History.

The first screenshot shows a spreadsheet with columns S, T, U, V, W, X. Column T is labeled 'StoreCode' and column W is labeled 'Customer Type'. Data rows include: '0 MENT, DO ""', '0 PERSON, K ""', '0 OPS COM ""1"', '0 OPS COM ""1"', and '0 CONSTRU ""1"'. Corresponding Customer Type values are '0 DOCUMENTATION', '0 DOCUMENTATION', '0 INSTALLER', '0 INSTALLER', and '0 CLEANER/RESTORE'.

The second screenshot shows a spreadsheet with columns R and S. Column R is labeled 'Comm_Sc Store' and column S is labeled 'Customer Type'. Data rows include: '1 ""', '1 ""', '1 ""', '1 ""', '1 ""', and '1 ""'. Corresponding Customer Type values are 'REMODELER', 'REMODELER', 'NA: HBTC', 'REMODELER', 'REMODELER', and 'REMODELER'.

Print Commissions and Print and Post Commissions

Print Commission History

Human Resources

Tax Tables

The Tax Table for Idaho, Minnesota, and Virginia has been updated with the 2019 values.

Sub Accounts

The ability to F8 to pull in Subaccount codes has been added to the Percentage Tax Rate screen, the Pay Preparation screen, and Personal Deductions screen.

Prepare Pay

Salary Hours

A Salary Hours field has been added to the Prepare Pay screen so that Salary Employee Hours can be tracked.

The screenshot shows the 'RFMS Pay Preparation for August 19, 2019' window. The worker is '41-AARON, HANK (W-2)' and the department is 'KIMBERLY'. The screen is divided into 'Earnings' and 'Deductions' sections. In the 'Earnings' section, there are fields for Amount, Store, Account, Sub, and State. In the 'Deductions' section, there are similar fields. At the bottom right, there is a 'Total State' section with a 'Salary Hours' field highlighted in red, showing a value of 40,000. Other fields include 'Sick Hours', 'Vacation Days', 'Holiday Days', and 'Other Leave'.

Check Stubs

Overtime and Doubletime Hourly Rates have been added to the Check Stub for Hourly Employees.

COMPANY NAME			001345
PAYEE: 24-LEAVE, HOURLY (\$20.00/hr.)			
Tax ID: XXXXXX870	Period: 08/08/19 - 08/15/19	Check No. 001345	Check Date 08/15/19
Earnings		Deductions	
REG. HOURS: 40.00	Federal W/H: 133.08	STATE EXTRA: 10.40	Gross Earnings: 1,040.00
O.T. HOURS: 8.00	State W/H: 39.77	EXT FWH: 2.00	Tot Deductions: -421.69
: 0.00	Local W/H: 104.00	LOCAL 2: 52.00	Net Pay: 618.31
: 0.00	FICA: 64.48	: 0.00	YTD Fed W/H: 353.66
: 0.00	Medicare: 15.08	: 0.00	YTD State W/H: 117.79
: 0.00	: 0.00	: 0.00	YTD Local W/H: 104.00
: 0.00	suta: 0.88	: 0.00	YTD Misc: 297.56
: 0.00	: 0.00	: 0.00	YTD Fed Taxable: 2,880.00
: 0.00	: 0.00	: 0.00	YTD State Taxable: 2,880.00
: 0.00	: 0.00	: 0.00	YTD Local Taxable: 2,880.00
Federal Taxable: 1,040.00	: 0.00	Sick: 0.000/ 24.000	YTD Local Grs: 1,040.00
FICA Taxable: 1,040.00	: 0.00	Vacation: 0.000/ 5.000	YTD Gross: 2,880.00
State Taxable: 1,040.00	: 0.00	Holiday: 0.000/ 6.000	YTD Net: 2,006.99
Local Taxable: 1,040.00	: 0.00	Other: 0.000/ 3.000	
		Overtime Rate: \$30.00/hr Doubletime Rate: \$40.00/hr	

End of Year

Generate W-2 & 1099 Information

Human Resources > File > End of Year > Generate W-2 & 1099 Information

The ability to filter 1099s that are less than the given threshold for a year has been added to the Generate screen.

Generate W-2 & 1099 Information for 2018

Tag Year: 2018

2018 Employee ID# Line: 88,402

2018 Employee/Medicare Line: 98,999,999

Name of Locality #1: [Empty]

Name of Locality #2: CA-SDI

Special Date Range: [Empty]

Begin: 01/01/18 End: 12/31/18

State ID Numbers:

State	State ID	Post 1099
CA	2	Yes
CO	3	Yes
GA	4	Yes
IA	5	Yes
OK	6	Yes
OR		Yes

Batch Postings to W-2:

Box #	Retirement	Deferred	Account	Account Name	Gross To Use	Box Description
1			689	TEST		Allocated tips
12L			595	OFFICE SUPPLIES AND POSTAGE		Substantiated employee busi
18B					State: CA	Local #2 wages, tips, etc

1099 Earnings Reduction by Misc. Deduction:

Account	Account Name

Percent Complete: 0%

1099 Minimum Gross: 600.00

Exclude Ytds

Total Records: 0
Records Processed: 0
Records Remaining: 0

Reports

Compensation Report

Total Gross and Medicare Taxable have been added as Gross to Use options on the Worker's Compensation Report screen.

The screenshot shows the 'Worker's Compensation Report' dialog box. It includes fields for 'Beginning Date' (07/01/19), 'Ending Date' (07/31/19), and 'Experience Modifier' (0.000%). Under the 'Gross to Use' section, three radio buttons are visible: 'Total Gross Earnings', 'Federal Taxable', and 'Medicare Taxable'. The 'Total Gross Earnings' and 'Medicare Taxable' options are circled in red. Other options include 'State Taxable' and 'Exclude Voids' (checked). There are also checkboxes for 'Output to File (Comma delimited .CSV format)' and 'Preview' (checked). The 'Export File Name' is 'COMP.CSV'. Buttons for 'Print' and 'Cancel' are at the bottom.

Quarterly Reports

941 Quarterly Report Printed

Human Resources > Reports > Quarterly > Reports > 941 Quarterly Report Printed

The ability to select Do Not Print, Print Full, or Print Mask for Print SS Number is now available on this report screen.

The screenshot shows the '941 Quarterly Report' dialog box. It includes fields for 'Start Date' (04/01/19), 'Stop Date' (06/30/19), and 'Tax Rate Year' (2019). There are checkboxes for 'Compute Quarterly Extensions' and 'Sort Order' (Name selected). The 'Employer identification number (EIN)' is '###-####-####'. The 'Name (not your trade name)' is 'DOCUMENTATION'. The 'Address' is '123 MAIN STREET', 'City' is 'PAPER', 'State' is 'AL', and 'Zip' is '12345'. Below this is 'Part 2: Tell us about your deposit schedule and tax liability for this quarter.' with a '14 Select One:' section. The selected option is 'You were a monthly schedule depositor for the entire quarter.' Below this is a dropdown menu for 'Print SS Number' with options: 'Do Not Print', 'Do Not Print', 'Print Full (ex: 123-45-6789)', and 'Print Mask (ex: XXXXX-6789)'. The 'Print SS Number' dropdown is circled in red. There are also checkboxes for 'Preview' and 'Print Green Bar'. The 'Export File Name' is 'QTRPAY.CSV'. Buttons for 'Reset Parameters', 'Edit Parameters', 'Print', and 'Cancel' are at the bottom.

Paid Family Medical Leave

Human Resources>Reports>Quarterly>Reports>Paid Family Medical Leave

The ability to print a report or create a CSV file for Family Medical Leave has been added.

The screenshot shows a dialog box titled "Paid Family Medical Leave Report". It has two main sections: "Parameters" and "Options".

Parameters:

- State: A dropdown menu with "MASSACHUSETTS" selected and "WASHINGTON" circled in red below it.
- Start Date: 07/01/19 (with a calendar icon and "FB" label).
- End Date: 09/30/19 (with a calendar icon and "FB" label).
- Include 1099 Workers: An unchecked checkbox.

Options:

- Print Preview: A checked checkbox.
- Output CSV To: An unchecked checkbox with a text field containing "RFMSCSV.CSV" and a browse button "...".

At the bottom, there are "Print" and "Exit" buttons.

Re-Print Pay Stubs

Reports>Re-Print Pay Stub

From this new feature, users can search for a check from the Pay History to find a check stub that needs to be printed.

The screenshot shows a dialog box titled "Re-Print Pay Stub". It has a "Filter Parameters" section at the top and a table of pay stubs below.

Filter Parameters:

- Check Number: An empty text field.
- Last Name: "MENT" (in a text field).
- Start Date: 01/01/80 (with a calendar icon and "FB" label).
- End Date: 08/05/19 (with a calendar icon and "FB" label).

Table:

Check Number	Pay Date	Last Name	First Name	DOC U.	Gross Amt	Net Amt	Seqnum
13	20151231	MENT		DOC U.	\$0.00	\$0.00	476
80252	20161227	MENT		DOC U.	\$0.00	\$0.00	476
80237	20161231	MENT		DOC U.	\$0.00	\$0.00	476
80258	20170630	MENT		DOC U.	\$0.00	\$0.00	476
80259	20170630	MENT		DOC U.	\$1,000.00	\$817.64	476
46	20171231	MENT		DOC U.	\$1,000.00	\$759.29	476
1223	20180124	MENT		DOC U.	\$1,000.00	\$784.33	476
1242	20180307	MENT		DOC U.	\$1,000.00	\$784.33	476
1248	20180425	MENT		DOC U.	\$1,000.00	\$784.33	476
1316	20190131	MENT		DOC U.	\$1,000.00	\$789.22	476

Print Options:

- PrintPreview: A checked checkbox.
- Print Dept Name: A checked checkbox.
- Mask Tax ID: A checked checkbox.

At the bottom right, there are "Print" and "Cancel" buttons.

PAYEE: 476-MENT, DOC U.

GENERAL DEPARTMENT

Period Beginning: 06/16/17 Period Ending: 06/30/17

Earnings		Deductions					
GROS	1,000.00	Federal W	72.07	:	0.00	Gross Earnin	1,000.00
:	0.00	State W	32.94	:	0.00	Tot Deducti	-182.36
:	0.00	:	0.00	:	0.00	Net P	817.64
:	0.00	FICA	62.00	:	0.00	YTD Fed W	72.07
:	0.00	Medicari	14.50	:	0.00	YTD State V	32.94
:	0.00	state	0.85	:	0.00	:	0.00
:	0.00	:	0.00	:	0.00	YTD Mi	77.35
:	0.00	:	0.00	:	0.00	YTD Fed Tax	1,000.00
:	0.00	:	0.00	:	0.00	YTD FICA Tax	1,000.00
Federal Taxa	1,000.00	:	0.00	:	0.00	YTD State Tax	1,000.00
FICA Taxat	1,000.00	:	0.00	:	0.00	:	0.00
State Taxa	1,000.00	:	0.00	:	0.00	YTD Gro	1,000.00
						YTD N	817.64

Utilities

Format Payroll Check

Utilities > Format Payroll Check

The company name can now be printed on the Payroll Check.

The screenshot shows the 'Payroll Check Format' dialog box with the following settings:

- Check Form Size: 8 1/2" x 7" 8 1/2" x 11"
- Check Position: Top Middle Bottom
- Check Number: Print Check Number. X: 6,719 Y: 573
- Pay Date: X: 5,052 Y: 1,458
- Name & Address: X: 469 Y: 1,927
- Alpha Dollars: Print Alpha Dollars. X: 469 Y: 1,094
- Name: Print Name On Pay Stub. X: 0 Y: 0
- Amount: Print Amount. X: 6,302 Y: 1,458
- Dollars & Cents: Print Dollars & Cents. Dollars: X: 0 Y: 0. Cents: X: 0 Y: 0
- Company Information: Print Company Info on Check. X: 1,450 Y: 100

At the bottom, the text reads: "DOCUMENTATION-MENUS & REPORTS112 MAIN X is measured from the left, Y is measured from the top. Thus, 3.5 inches from the left would be X = 3500". Buttons for 'Set Default', 'Print Example', 'Save', and 'Abandon' are visible at the bottom.

State Taxable: 1,000.00	Local Taxable: 0.00	Other: 0.000/ 3.000
Overtime Rate: \$30.00/hr Doubletime Rate: \$40.00/hr		

DOCUMENTATION-MENUS & REPORTS
112 MAIN ST
ANYWHERE, USA 55555

001342

SEVEN HUNDRED SEVENTY-FOUR AND 31/100 DOLLARS

07/02/19 \$774.31

HOURLY LEAVE
123 TEST TEST
TUSCALOOSA, AL 35405

Sales Reports

Material Analysis

Quotes

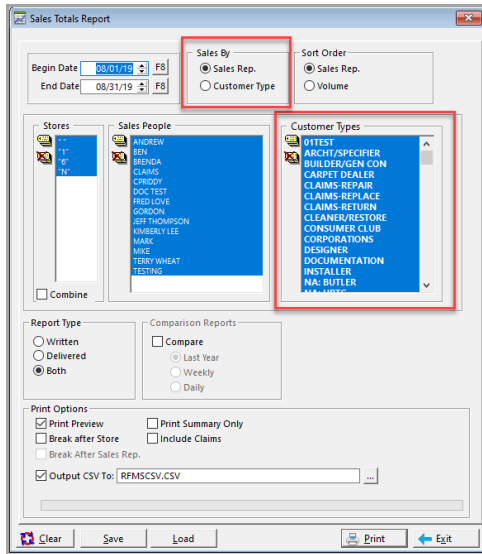
The ability to [Save and Load](#) a filter has been added to the Quote Material Analysis.

Sales

Sales Totals

File>Sales>Sales Totals

The ability to print and filter by Customer Type has been added.



Profitability

Job Cost Analysis Report

File>Profitability>Job Cost Analysis Report

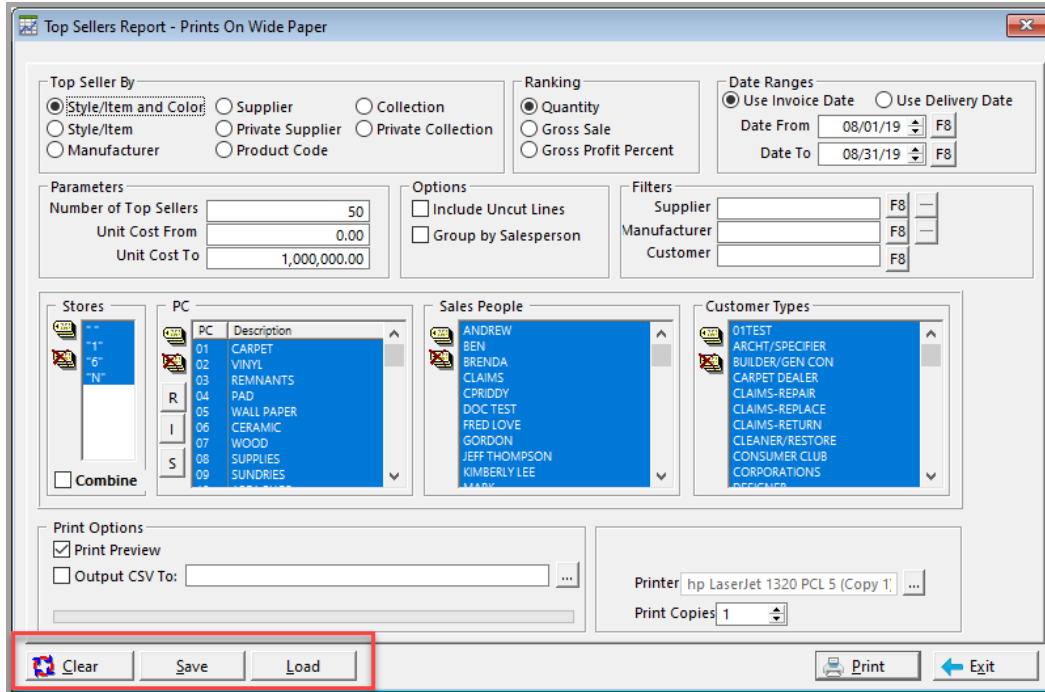
The Ship-To City, State, and Zip have been added to the CSV.

AM	AN	AO	AP	AQ
ServicePri	UD Main	ShipToCity	ShipToState	ShipToZip
0		TUSCALOOSA		35405
135.04		NORTHPORT	AL	35475

Marketing

Top Sellers

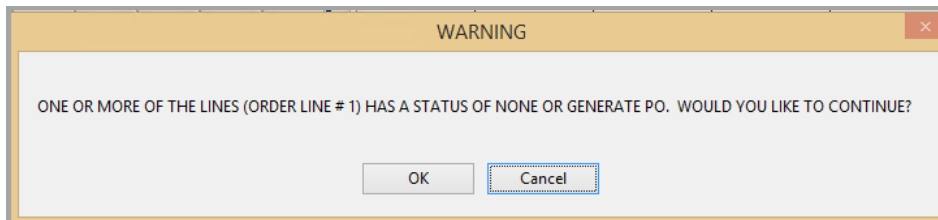
The ability to [Save and Load](#) a filter has been added to the Top Sellers Report.



Schedule Pro

Warnings

Schedule Pro Warnings now include the line number on the line with the issue.



Find Screens

Enter can now be used as a hotkey for the OK button.


System Options

System Options

The System Option *Create Provider Records for Service Lines with No Crew Scheduled* has been removed. Schedule Pro no longer creates Provider Records with no Crew assigned.

To compensate for this, the ability to edit a job and add a provider has been added to the Create Provider Records screen. There is also the existing ability to assign a provider and create the provider record from the Quick Edit Screen.

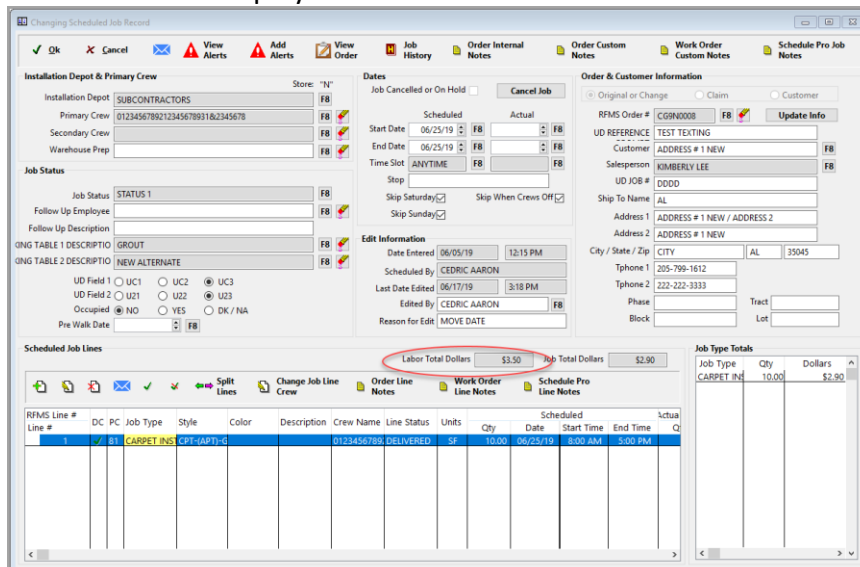
Job History

A Job History button  has been added to the Scheduled Jobs, Edit Jobs, and Quick Schedule toolbar. Job History automatically adds a record when there are any changes to the job. It tracks changes made by Edit Job, Weekly Grid, Quick Edit, and Quick Schedule. It gives more details when Primary Crew, Secondary Crew, or Scheduled/Actual Start and End Dates are changed.

Edit By	Edit Reason	Date	Time	Edited Field	Changed From	Changed To
SSentell		06/24/19	4:15:51PM			
SSentell		06/25/19	9:02:32AM	SCHEDULED START DATE	06/26/19	06/27/19
SSentell		06/25/19	9:02:32AM	SCHEDULED COMPLETE DATE	06/26/19	06/28/19
SSentell		06/25/19	9:02:32AM	SECONDARY CREW		DOCUMENT CREW

Edit Job Screen

The Labor Total display field has been added to the Edit Job screen.



The screenshot shows the 'Changing Scheduled Job Record' window. At the top, there are various toolbars including 'Ok', 'Cancel', 'View Alerts', 'Add Alerts', 'View Order', 'Job History', 'Order Internal Notes', 'Order Custom Notes', 'Work Order Custom Notes', and 'Schedule Pro Job Notes'. The main area is divided into several sections: 'Installation Depot & Primary Crew', 'Dates', 'Order & Customer Information', and 'Job Status'. The 'Dates' section includes fields for 'Start Date', 'End Date', and 'Time Slot'. The 'Order & Customer Information' section includes fields for 'RFMS Order #', 'UD REFERENCE', 'Customer', 'Salesperson', 'UD JOB #', 'Ship To Name', 'Address 1', 'Address 2', 'City / State / Zip', 'Tphone 1', 'Tphone 2', 'Phase', 'Block', 'Tract', and 'Lot'. At the bottom, there is a 'Scheduled Job Lines' table and a 'Job Type Totals' table. The 'Labor Total Dollars' field is highlighted in red, showing a value of \$3.50.

RFMS Line #	DC	PC	Job Type	Style	Color	Description	Crew Name	Line Status	Units	Scheduled Date	Start Time	End Time
1			CARPET INS	CPT-APT1-G		0123456789 DELIVERED		SP	10.00	06/25/19	8:00 AM	5:00 PM

Scheduled Jobs

Location has been added to the Scheduled Job Lines Browse screen (bottom screen) on the Scheduled Job screen.

Scheduled Jobs

Search: GLINDA

Store	OI	OC	J	RFMS Order #	UD REFERENC	Customer	Start Date	End Date	Time Slot	UD TRACKING TAB1	UD TRACKING TAB2	Job Status	Primary Crew	UD JOB #	Ship T
"	"	"	"	CG602714		GOOD, GLINE	03/13/17	03/13/17	ANYTIME			STATUS 1	TEST		GOO
"	"	"	"	CG9 0038		GLINDA THE	06/28/19	06/28/19	ANYTIME			STATUS 1	TEST EXEMP		OZ
"	"	"	"	ST000034	TEST FOR EST	GLINDA THE	06/27/19	06/28/19	ANYTIME			STATUS 1	HOURLY		OZ

Scheduled Job Lines

Qty	Units	Line Status	Install Date	Start Time	End Time	Location
1.00	EA	JOB COSTED	03/13/17	8:00 AM	5:00 PM	
10.00	EA	JOB COSTED	03/13/17	8:00 AM	5:00 PM	
50.00	EA	JOB COSTED	03/13/17	8:00 AM	5:00 PM	
180.00	SF	JOB COSTED	03/13/17	8:00 AM	5:00 PM	

Ship To Address
 123 YELLOW BRICK ROAD
 2486 COUNTY RD 46
 TUSCALOOSA
 AL 35401

Sold To Address
 123 YELLOW BRICK ROAD
 TUSCALOOSA
 AL 35401

UD Field 1
 UC1 UC2 UC3

UD Field 2
 U21 U22 U23

Schedule New Jobs

A Worker ID column has been added to the Select Crew to Schedule screen.

Select Crew to Schedule

Crew Name: _____ Date: 08/08/19 Thursday FB All

Search Crew Name: _____

Crew Name	Worker ID	Crew Description	Crew Nip
0123456789212345678931423	0	LAMINATES/VINYL	
ANSERSON	471		
BELUSHI	111		
DOCUMENT CREW	999		
HOURLY	215	LAMINATES/VINYL	HOURLY
HR CREWMEMBER	471		NEW
TEST	0	CARPET	

Quick Schedule

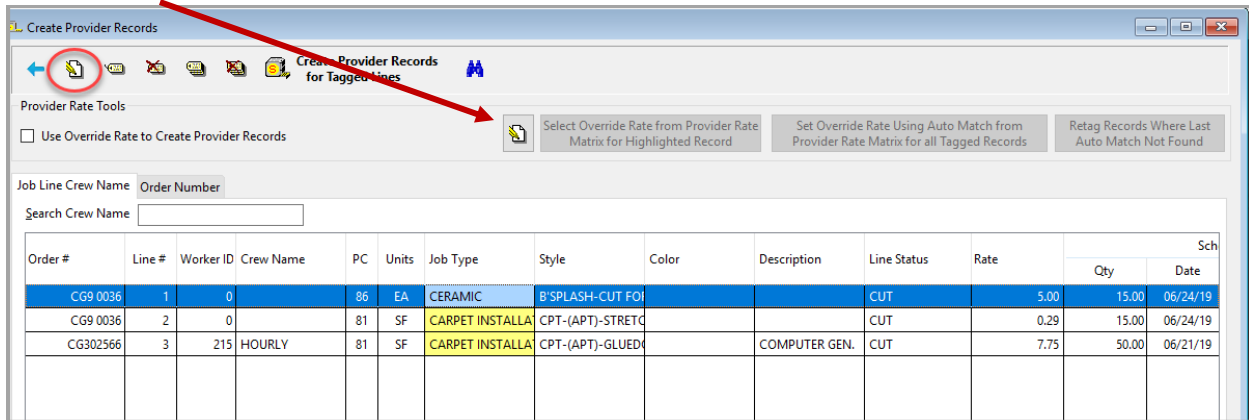
The Copy Browse function (Ctrl + Alt + Shift + C) has been added to the Quick Schedule Browse screen.

Work Orders will print for tagged jobs in the order of crew names.

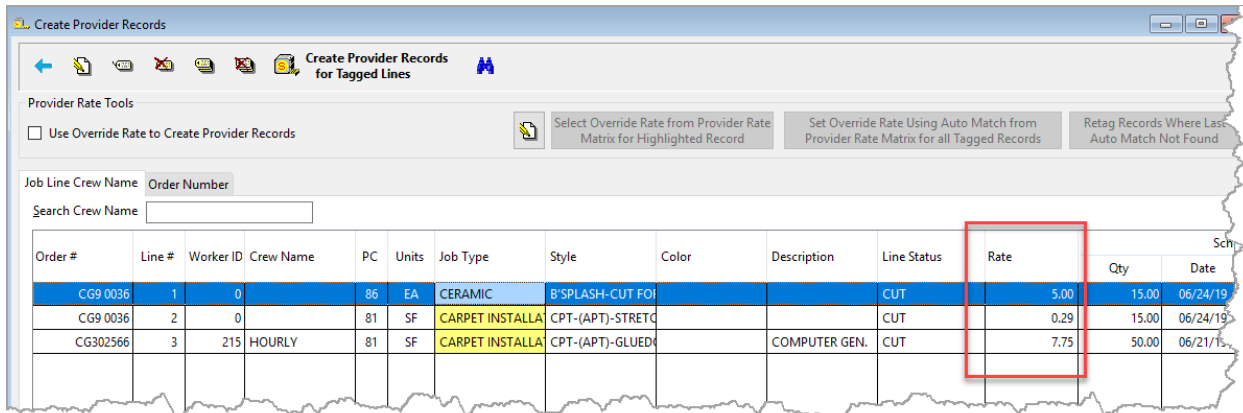
Create Provider Record

The ability to edit the highlighted job on the Create Provider Records Browse screen has been added.

The Edit Override Rate button is now in line with the other related buttons.



Provider Rate has been added as a column to the Create Provider Record Browse screen.



The Worker Id will display on the Create Provider Records browse.

Order #	Line #	Worker ID	Crew Name	PC	Units	Job Type	Style	Color	Description	Line Status	Rate	Qty	Date
CG910044	3	0		81	SF	CARPET INSTALLATION	CPT-(APT)-GLUEDC			DELIVERED	0.29	5.00	04/12/
CG910044	4	0		81	SF	CARPET INSTALLATION	CPT-(APT)-GLUEDC			DELIVERED	0.29	5.00	04/19/
CG9 0036	1	0		86	EA	CERAMIC	B'SPLASH-CUT FOR			CUT	5.00	15.00	06/24/
CG9 0036	2	0		81	SF	CARPET INSTALLATION	CPT-(APT)-STRETC			CUT	0.29	15.00	06/24/
TIM	2	0		81	SF	CARPET INSTALLATION	CPT-(BASIC)-FREE			NONE	0.35	66.67	06/27/
CG203190	3	0	01234567892123456	81	SF	CARPET INSTALLATION	CPT-(BASIC)-STRET			CUT	0.35	316.00	07/01/
CG203190	4	0	01234567892123456	81	SF	CARPET INSTALLATION	CPT-(BASIC)-STRET			CUT	0.35	166.00	07/02/
CG203190	5	0	01234567892123456	81	SF	CARPET INSTALLATION	CPT-(BASIC)-STRET			CUT	0.35	70.00	07/03/
CG602672	2	999	DOCUMENT CREW	81	SF	CARPET INSTALLATION	CPT-(BASIC)-GLUE			CUT	12.50	500.00	04/30/
CG602601	2	999	DOCUMENT CREW	81	SF	CARPET INSTALLATION	CPT-(BASIC)-GLUE			DELIVERED	12.50	5.00	05/15/
ST000063	5	999	DOCUMENT CREW	84	SF	TAKE UP CARPET	TAKEUP REG CPT/P			NONE	12.50	400.00	07/04/
ST000063	9	999	DOCUMENT CREW	87	SF	WOOD	PLANK-UNF (NAIL)			NONE	12.50	421.05	07/04/
ST000063	13	999	DOCUMENT CREW	87	EA	WOOD	FINGER IN DOOR V			NONE	12.50	1.00	07/04/
CG9 0126	3	999	DOCUMENT CREW	81	SF	CARPET INSTALLATION	CPT-(BASIC)-FREE			CUT	12.50	15.00	07/18/
CG9 0126	4	999	DOCUMENT CREW	86	SF	CERAMIC	CER-(BASIC)-FREE			CUT	12.50	15.00	07/18/
ST000034	2	215	HOURLY	81	SF	CARPET INSTALLATION	CPT-(APT)-GLUEDC			NONE	7.75	100.00	06/27/
ST000034	6	215	HOURLY	81	SF	CARPET INSTALLATION	CPT-(APT)-GLUEDC			NONE	7.75	1.00	06/27/
CG9 0023	3	215	HOURLY	81	SF	CARPET INSTALLATION	CPT-(BASIC)-GLUE			NONE	7.75	150.00	06/27/
CG502092	5	215	HOURLY	86	SF	CERAMIC	FLOOR-TILE PATTE			CUT	7.75	15.00	06/27/
CG202745	2	0	TEST	86	SF	CERAMIC	FLOOR-TILE STRAI			CUT	2.15	350.00	07/01/
CG202745	5	0	TEST	86	HR	CERAMIC	CERAMIC TEAR OU		BOTH BATHS	CUT	50.00	3.00	07/01/

Calendar View

Open Schedule Pro in Read Only

When this System Option was set to yes, some of the text on the Calendar View still appeared yellow and was hard to read. This has been changed to blue.

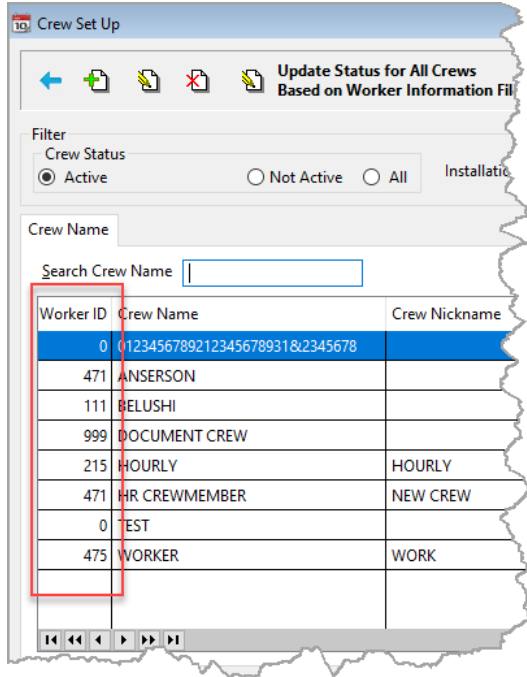
Sunday	Monday	Tuesday	Wednesday
Nov 4, 2018 0	Nov 5 16.0	Nov 6 13.8	Nov 7 16.6
Nov 11 0	Nov 12 16.0	Nov 13 16.0	Nov 14 16.6
Nov 18 0	Nov 19 16.0	Nov 20 16.0	Nov 21 16.6
Nov 25 0	Nov 26 16.0	Nov 27 16.0	Nov 28 16.6

Utilities

Setup

Crews

The Worker Id now displays on the Crew Set Up Browse.

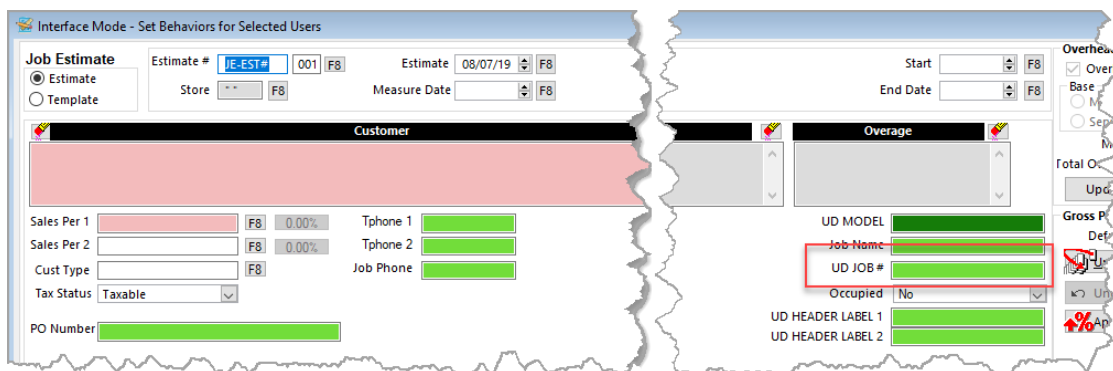


BidPro

Interface Mode

Model is now included in interface mode and no longer a required field.

The Job # field, Ad Source, Order Type, Contract Type, Service Offering, Customer Email, and Area in BidPro have been added to the Interface Mode.



Interface Mode - Set Behaviors for Selected Users

Job Estimate

Estimate # F8 Estimate 08/07/19 F8 Customer #

Store Measure Date Overage Customer #

Ad Source UD ORDER TYPE

UD Contract Type UD SERVICE OFFERING

Customer Email

Publish To Web

Origination B

Interface Mode - Set Behaviors for Selected Users

Estimate Line

Line # F8 Use Tax Line Start Date

Area Completion Date

Select Product

Product F8 CARPET

Style

Color

Estimate Lines

When adding/editing a line, only the line that was added or editing will be calculated at the line level.

The line number can now be edited to an existing line number. The current line number will be moved down as will the ones below it.

Tax Status

PO Number

Line Number Area Style Color

Line	Area	PC	Item #	Style / Name	Color / Description
1	LIVINGROOM	01		*PRIVATE STYLE HEAD TO BE DETER	
2	LIVINGROOM	07	CG-HENDD	BABY THRESHOLD 3	TO BE DETER
3	BASEMENT	01		PIE R ROUND	CARMEL

Changing Line Item (JE100321)

Estimate Line

Line # F8 Use Tax Line Start Date UD LINE LABEL

Area F8 Completion Date UD LINE LABEL

Original Product Info

Product F8 CARPET

Style

Color

Unit

Supplier

Original Actual Cost:

Use Actual Only Update Allowed Costs when Product is Selected

Line number 2 already exists on this estimate. Use this number anyway moving all lines as needed?

Yes No

Line Number	Area	Style	Color	PC	Item #	Style / Name	Color / Description	Units	Qty
2	LIVINGROOM	01				*PRIVATE STYLE HEAD TO BE DETERMINED		SY	13
3	LIVINGROOM	07	CG-HENDD			BABY THRESHOLD 3 TO BE DETERMINED		EA	100.00
4	BASEMENT	01				PIE R ROUND	CARMEL	SY	83

Word Merge

Word Merge now pulls over Line Attachments.


DOCUMENTATION COMPANY
112 MAIN ST
(205) 123-4456

Estimate Date: 03/14/16 Estimate: JE100254

Customer	Project
DOCUMENT, TECHNICAL 145 TEST ROAD PULASKI TN 38478	DOCUMENT, TECHNICAL 145 TEST STREET PELL CITY AL 11111

Job Number	PO Number	Job Phone	Customer ID #
			3424

Area	PC	Style	Style #	Color	Manufacturer	W x L	Qty	Units	Price	Total
BASEMENT	10	RUG	RUG	COPPER PENNY	MANUFACTURER	3' 10" x 5' 4"	1.00	SF	115.44	115.44

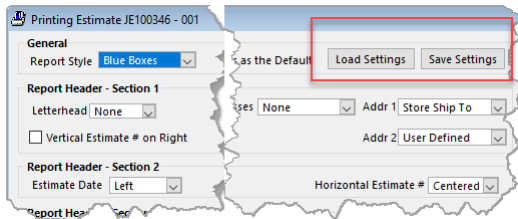


Material	115.44
Services	0.00
Misc Charges	0.00
Sales Tax	11.54
Misc Tax	0.00
Estimate Total	126.98

Print Estimates

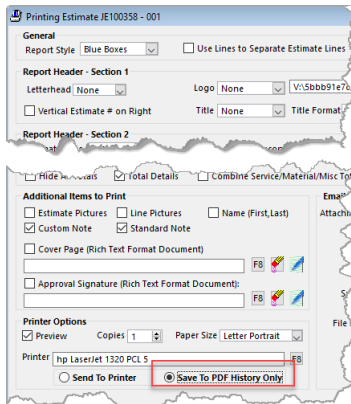
Load and Save

The ability to load and save settings has been added to the Printing Estimates screen.



Save To PDF History

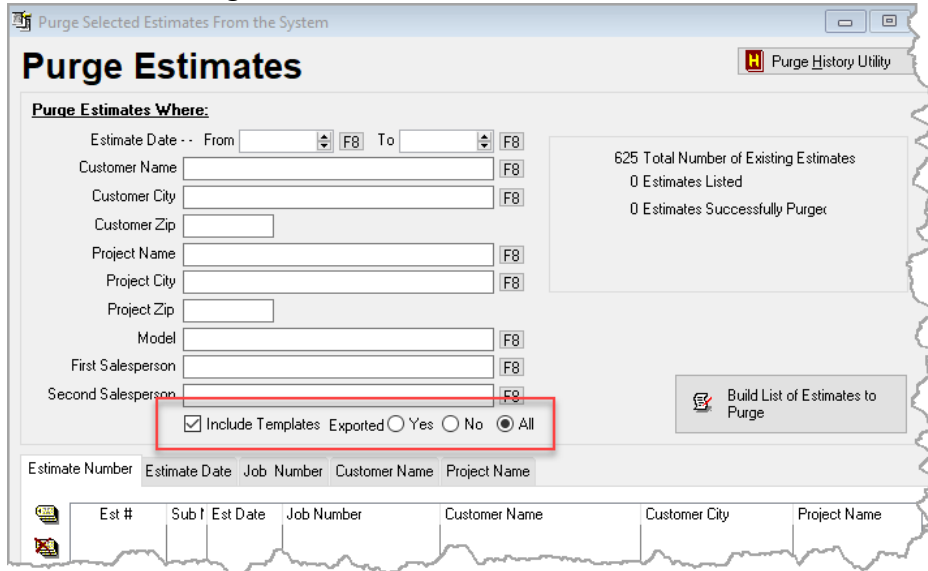
Save to PDF History has been added to the Print Estimates screen.



Utilities

Purge Estimates

The ability to include or excluded templates and exported estimates in the purge has been added to the Purges Estimates screen.

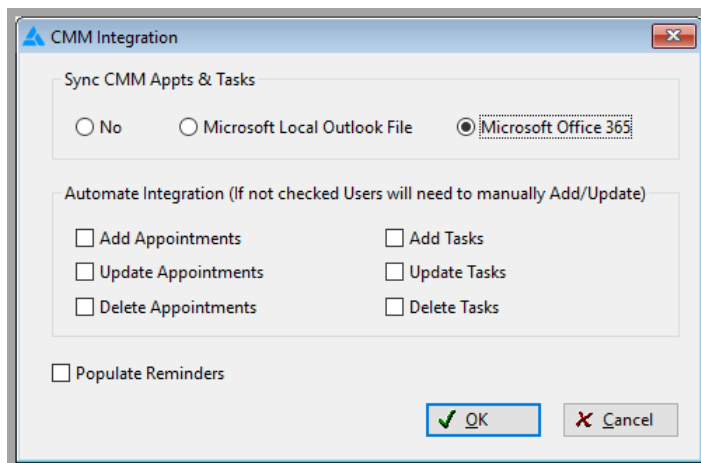


Client Management (CMM)

Microsoft Office 365

The ability to use Microsoft Office 365 for Outlook Integration has been added to RFMS. This will allow users with Microsoft Office 365 to integrate with Client Management (CMM) for tasks and appointments.

To set this up, Microsoft Office 365 needs to be selected in the [Synchronize User with Outlook](#) System Option.



Once Microsoft Local Outlook File or Microsoft Office 365 is selected, then the options for Automate Integration will be able to be chosen.



When using Microsoft Office 365, F5 must be used to refresh the page when any changes are made.

System Options

The System Option [Telephone 1 Required in Orders, Quotes, or Claims](#) is now available for CMM. If the option is set to yes, the Telephone 1 field must be filled in when creating an order or a quote from CMM.

Templates

The ability to filter by Templates Only has been added to the Tasks, Appointments, Remarks, and Alert browses.

The screenshot shows the 'Tasks' window with a toolbar and a 'Task Filters' section. The 'Task Filters' section includes fields for 'Search Fields', 'Assigned To', 'Created By', and 'Task Type', each with a dropdown menu. There are also checkboxes for 'Private', 'Public', 'Active', 'Inactive', 'Outstanding', and 'Completed'. The 'Templates Only' checkbox is highlighted with a red box.

Start Date	Due Date	Task	Task Type	Assigned To	Created By	Related Record	Related Record Typ
		43 REGRESSION	EMAIL	ANDREW	KIMBERLY	PROSPECT_NEW	PROSPECT
		44REGRESSION	SEND INFO	ANDREW	KIMBERLY	CG302581	ORDER
		619	OTHER	ANDREW	KIMBERLY	619.REGRESSION	PROSPECT
		CALL JIM THOMPSON	CALL	GORDON	JTHOMPSON		
		FOLLOW UP AND GE	CALL	ANDREW	KIMBERLY		
		FOLLOW UP AND GE	CALL	ANDREW	KIMBERLY		
		JOHNNY STOKES	CALL	GORDON	JTHOMPSON		
		NEW TASK TEST-FRI	NEW TASK	FRED LOVE	KIMBERLY		
		REGRESSION	OTHER	ANDREW	KIMBERLY	PROSPECT_NEW	PROSPECT
		SEND LITERATURE	TO BE ASSIGNED	KIMBERLY	KIMBERLY	TEMPLATE_TEMPLATE	PROSPECT
		TEMPLATE TASK	NEW TASK	MARK	KIMBERLY		
		TEMPLATE TASK	NEW TASK	JEMECHIA	KIMBERLY	TILLERY_BRIAN	PROSPECT
		TEMPLATE TASK-AS	NEW TASK	TO BE ASSIGNED	KIMBERLY	ALABAMA BRICK	SUPPLIER
		TEST	OTHER	ANDREW	KIMBERLY	ES902515	QUOTE
		TEST	OTHER	ANDREW	KIMBERLY	CG302579	ORDER
		TEST #2	OTHER	CPRIDY	CPRIDY	TEST EMPLOYEE	PERSONNEL
		TEST 2	OTHER	ANDREW	KIMBERLY	ES902515	QUOTE

Workbench

The Customer's name has been added to Order Line Status Change Alerts in the Alerts section of the Workbench.

Alert Date	Alert	Related Record
08/02/19	ORDER LINE STATUS C	ST000022-1 OZ, WIZARD
08/02/19	ORDER LINE STATUS C	CG704046-5 OZ, WIZARD

Alerts

The ability to filter by Alert Type has been added to the Alerts browse screen.

Date Created	Due Date	Alert Description	Alert Type	Details	Assigned To	Created By	Related
09/29/14		TEST NEW ALERT	NEW ALERT	TEST NEW ALERT	ANDREW	KIMBERLY	PROSP
09/29/14		ANOTHER ALERT	NEW ALERT	ANOTHER ALERT	ANDREW	KIMBERLY	
09/29/14		ANOTHER ALERT	NEW ALERT	ANOTHER ALERT	ANDREW	KIMBERLY	

Sales Leads

The ability to filter Sales Leads by location has been added to the Sales Lead Browse screen.

Date Created	Due Date	Location	Customer Name	Ship To Name
07/31/19		DOCUMENTATION ST	BRADSHAW, CAI	
07/31/19		DOCUMENTATION ST	BIG, MR.	

Potential Sales column has been added to the Sales Lead Browse screen.

The screenshot shows the 'Sales Leads' window with a table of leads. A red box highlights the 'Potential Sale' column, which contains values for two leads: 150,000.00 and 250,000.00.

Customer Name	Ship To Name	Salesperson	Type	Lost / Status	Follow Up	Potential Sale
BRADSHAW, CAR		DOC TEST	WALK IN	SALES LEAD		150,000.00
BIG, MR.		TO BE ASSIGNED		SALES LEAD		250,000.00

The Notes feature has been added to the add/edit Sales Lead screen. This should be used instead of a remark if a longer comment is needed. Remarks are limited to 500 characters as they can print on certain reports.

The screenshot shows the 'Changing Sales Lead' form. The 'Notes' button at the bottom is highlighted with a red box. The form includes sections for contact information, sales lead details, status, and record information.

Sales Lead Contact Information

First Name: CARRIE
 Last Name: BRADSHAW
 BRADSHAW, CARRIE
 Tphone 1: 205-321-6547
 Tphone 2: 205-987-6541
 Email: ifmsdocumentation@gmail.com

Sales Lead Information

Lead Type: WALK IN
 Location: DOCUMENTATION STORE
 Ad Source:
 Ad Campaign:
 Interest Level: None Low Medium High
 Potential Sale: \$ 150,000.00

Sales Lead Status

Salesperson: DOC TEST
 Assigned To Status: Accepted Requested Declined To Be Assigned
 Order Status: SALES LEAD
 Repeat Inquiry: Lost: Due Date:
 Follow Up Reminder: Reminder Date:
 Reminder Time:

Record Information

Date Created: 07/31/19 9:10 AM
 Created By: SSENTELL
 Date Edited: 07/31/19 9:24 AM
 Edited By: SSENTELL
 Viewing Rights: Private Public

Buttons at the bottom: Repeat, Order Tracking, Send Mail, **Notes**, Ok, Cancel.

Contacts

The ability to add an attachment to a contact has been added.

The screenshot shows a 'Changing Contact' dialog box with several sections: 'Contact Information', 'Primary Address', 'Secondary Address', 'Related To', and 'Record Information'. At the bottom, there are buttons for 'Send Mail', 'Attachments' (highlighted with a red box), 'Ok', and 'Cancel'. Below the buttons are checkboxes for 'Receive Statements', 'Receive Invoices', and 'Schedule Pro'.

Projects

An Attachment button has been added to the Project browse screen.

The screenshot shows the 'Projects' browse screen. At the top, there is a toolbar with several icons, including an 'Attachments' icon (a paperclip) which is circled in red. Below the toolbar are 'Project Filters' and a table of project data.

Contract Number	Project Name	Project Type	Project Status	UD JOB #	Customer Name	Business
15.2 OCTOBER	15.2 OCTOBER	UPDATE			223456789022345678903263	80 CHAF
	15.3 PAYROLL	UPDATE				
	16.0 UPDATE	UPDATE				
	17.1	UPDATE				
2019	0 UPD	UPDAT				

Project Profile

An F8 button has been added beside the City on the Project Profile tab.

Changing Project

Project

Contract # TESTING AGAIN Customer Name MENT, DOC U.
 Project Name DOCUMENT Business Name MENT, DOC U.
 Project Type DOCUMENT F8 Project Manager
 Project Status F8 Salesperson DOC TEST
 Store "" F8 Estimator
 Primary Order/Quote/Estimate ORDER CG502153

Project Profile Bids Orders Materials & Services Scheduled Lines Provider & Other Expenses Purch

Primary Customer Information

Customer Name MENT, DOC U. Tphone 1 2051234567 Milest
 Business Name MENT, DOC U. Tphone 2 2021234567 Esti
 Address 123 PAPER STREET Work ##### Compl
 City ALICEVILLE F8 Business Wage Rep
 State AL Zip 35442 Other #
 EMail

Site Address Architect

Site Name TEST SITE Name

Orders

The ability to view lines on an order in a Billing Group has been added.

Changing Project

Customer Name MENT, DOC U. F8 UD JOB #

Project

Contract # TESTING AGAIN
 Project Name DOCUMENT
 Project Type DOCUMENT F8
 Project Status F8
 Store "" F8

Project Profile Bids Orders Materials & Ser

Billing Group No. 671

Project Information
 Primary Order No CG602578 Project Number PROJECT #671
 Project Information BILLING GROUP FOR INVOICE CG602578

Contract
 Set Undo
 Contract Amount 0.00
 Date To Contract
 Allow Finance Charge

Partial Billing
 Set Undo
 Partial Billing Group
 Last Delivered Date
 Last Bill Date
 Last Billing Number

Retainage
 Amount \$0.00
 Percent 0.000000
 Days 0
 Due
 Billed

Projected Costs & Profit

Original Orders: 7,905.98
 Change Orders: 4,205.00
Grand Total: \$12,110.98
 Payments (Less FC): 7,950.70
Balance: \$4,160.28
 Delivered Total: 1,057.50
 Undelivered Total: 11,053.48

Suspend Total Calculations Recalculate Tot

Order Details

Sold To MENT, DOC U.
 123 PAPER STREET
 OPELIKA, CA 36801

Ship To MENT, DOC U.
 123 PAPER STREET
 OPELIKA, CA 36801

Sales Reps DOC TEST

Order Date 01/05/16
 UD ED Date 05/04/17

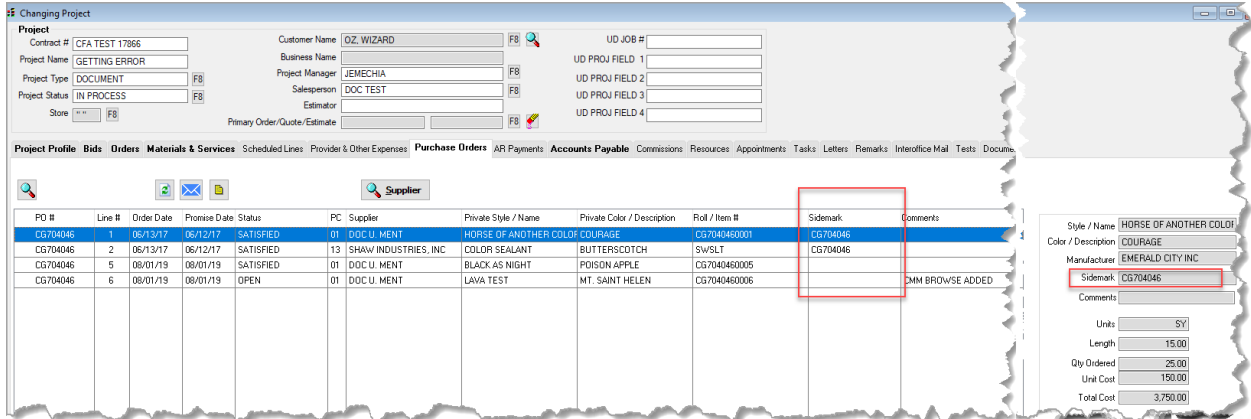
Orders: Contact Information

Order Number	Store	Order No	Delivered	Customer Name	Billing Number
	" "	CG502153		MENT, DOC U.	
	"N"	CG602547		MENT, DOC U.	IN
	" "	CG602578	10/05/17	MENT, DOC U.	BC
	"N"	CG602716		MENT, DOC U.	
	"N"	CG602717		MENT, DOC U.	
	"N"	CG7N0002	10/05/17	MENT, DOC U.	

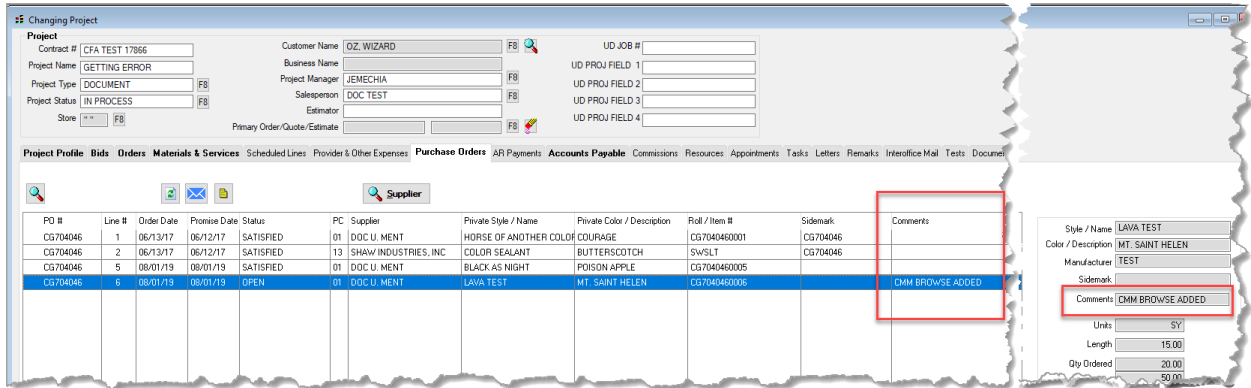
Purchase Orders

The ability to [sort](#) using the columns has been added to the Purchase Order tab.

Sidemark has been added to the Purchase Order tab.



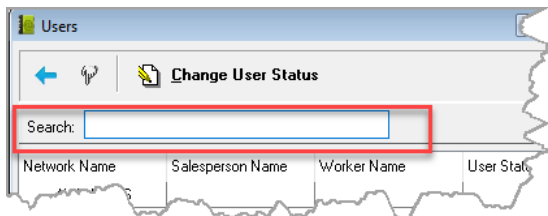
The Comments field has been added on the Purchase Order tab.



Utilities

Utilities > View User Statuses

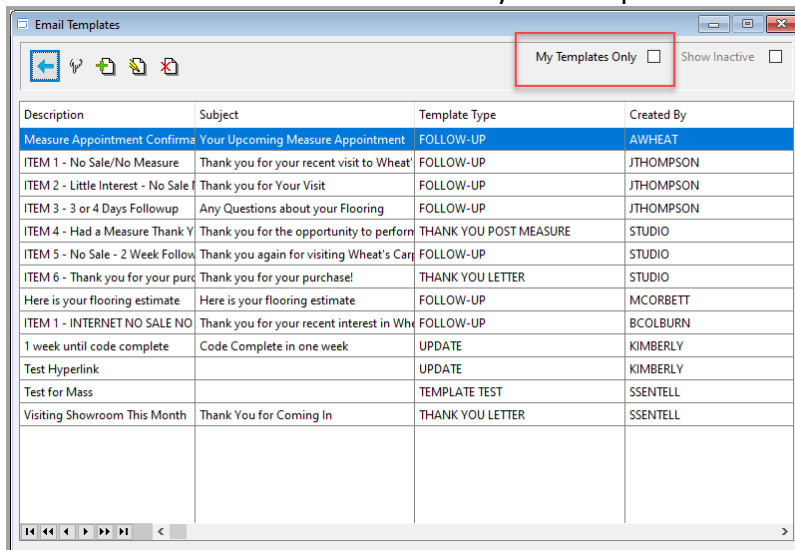
A search field has been added to this screen.



Email Templates

Utilities>Client Management Set Up>Email Templates

A checkbox has been added to filter by the templates created by the current user only.



E-Commerce

Match Screen

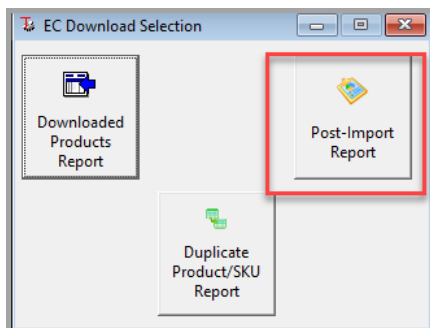
The Carton Qty has been added to the match pop up screen.

832

The Store Code has been added to the Supplier Cross Reference table for 832 mapping import. If using Store Specific, the user can add mapping at the store level. When importing, all prior mapped stores will still work until updated to Store Specific.

EC Download Selection

Pre-Import Matching Report is no longer available. The Post-Import Report should be used.



Items (19.0.2)

Items length and width will populate following the rules below:

Insert - the Actual Length and Width will be populated if data available

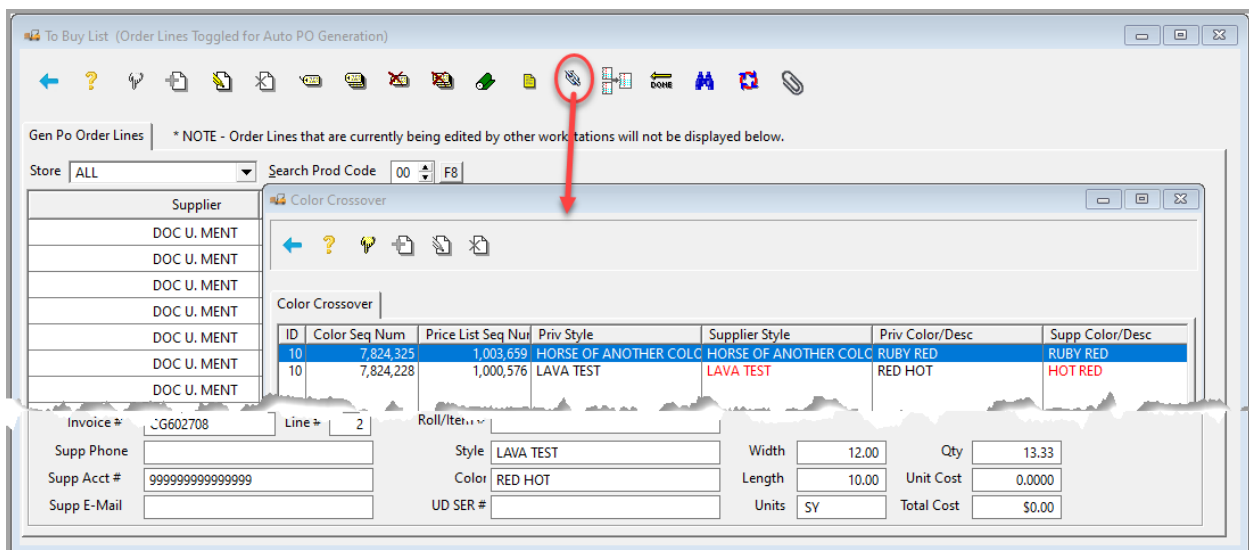
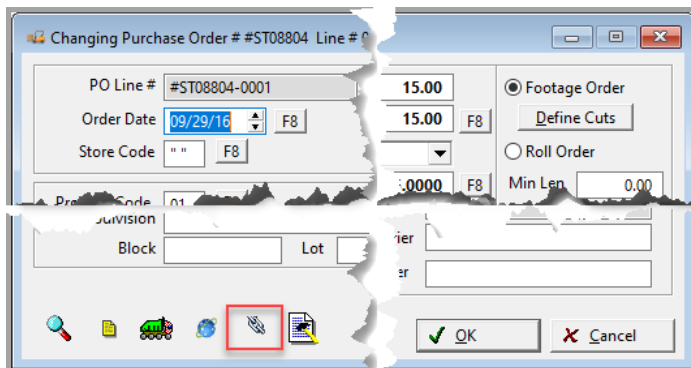
Update - the Actual Length and Width will be populated if data available and the product record has no data in those fields

Color Crossover

Purchase Orders

If a system is not set to use Color Crossover, then the Color Crossover button will not appear on the Purchase Order Edit screen or the Auto PO toolbar.

If the system is set to use Color Crossover, then the button will appear, and if the product has a cross over, then the button will be enabled. When there is no cross over, the button will not be enabled.



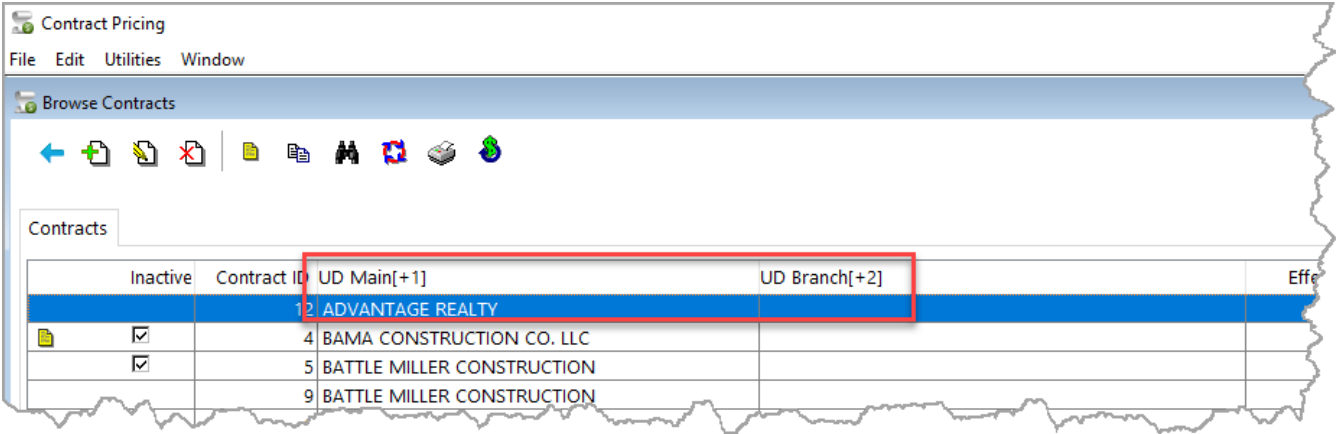
Contract Pricing

System Options

Cost to Use System Option is now Global and locked.

Browse Screen

The Browse Contracts screen can now be sorted by the Main and Branch columns.



Contract Lines

Unreferenced lines are now marked in Red on the Contract Lines screen.

Contract Lines

Line #	PC	Style	Style Num	Color	Color Num	Contract Price
1	01	PRIVATE STYLE	PRIVATE STYLE	PRIVATE COLOR	PRIVATE COLO	40.0
2	02	PRIVATE STYLE	PRIVATE STYLE	PRIVATE COLOR	PRIVATE COLO	8.0
3	04	GOLD-COMMERCIAL	GOLD-1/4	8# REBOND-1/4"		0.1
4	04	BRONZE-BASIC	BRONZE-7/16	3.5# REBOND-7/16"		0.1
5	04	PLATINUM-DELUXE	PLATINUM-DEL	8# REBOND-7/16"		0.37
6	04	PLATINUM-DELUXE	PLATINUM-DEL	8# REBOND GLACIER DEL		0.5
7	04	TITANIUM-SUPREME	TITANIUM-SUP	8# STAINMASTER MEMC		0.50
8	04	PLATINUM-HLI	HLI-PLATINUM	8# W/ANTI-MICROBIAL T		0.46
9	04	GOLD-ADVANCED	GOLD-7/16	6# REBOND-7/16"		0.1
10	04	SMART CUSHION BERBER - P	PSC3A	KOMEN	KOMEN	4.5
11	04	SMART CUSHION BERBER - P	PSC3A	38	38	4.5
12	04	SMART CUSHION BERBER - P	PSC3H	KOMEN	KOMEN	4.55
13	04	SMART CUSHION BERBER - P	PSC3H	38	38	4.55
14	04	SMARTCUSHION - PAD - 6 F	PSC1A	KOMEN	KOMEN	5.29
15	04	SMARTCUSHION - PAD - 6 F	PSC1A	GREEN	1532	5.29
16	04	SMARTCUSHION - PAD - 6 F	PSC1H	KOMEN	KOMEN	4.9
17	04	SMARTCUSHION - PAD - 6 F	PSC1H	GREEN	1532	4.97
18	04	1000	1000D	00000	00000	13.157

Property Connect

Properties not published to the Web will no longer appear in the Admin Property Assignment List.

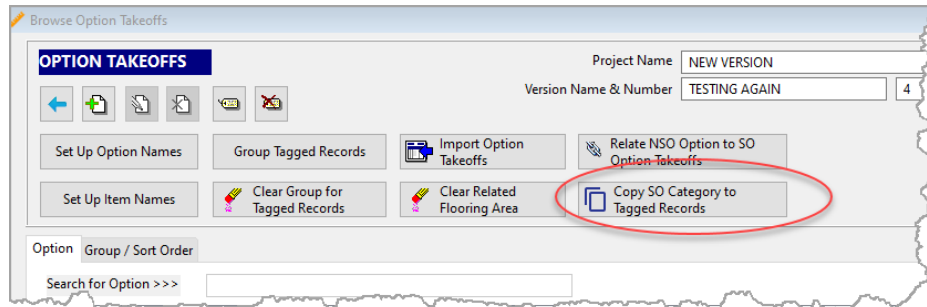
NHMS

Project Overview

Option Takeoffs

Project Overview > Pricing Versions > Options > Option Takeoffs

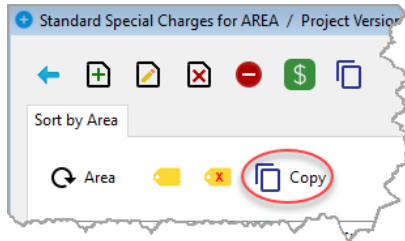
The ability to Copy Standard Option Categories to Multiple Records has been added to the Takeoffs screen.



Standard Special Charges

Project Overview>Pricing Versions>Flooring>Standard Special Charges

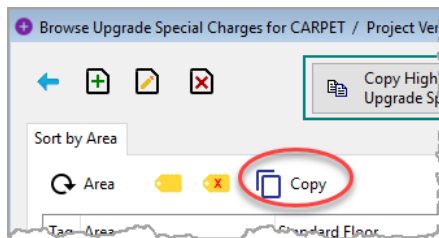
The ability to copy the highlighted line to the tagged line has been added.



Upgrade Special Charges

Project Overview>Pricing Versions>Flooring>Upgrade Special Charges

The ability to copy the highlighted line to the tagged line has been added.



Home Buyer Price Requests

An F8 button has been added beside Quantity on this screen to pull in Takeoffs.

Record Will Be Changed

REQUEST INFORMATION

Home Buyer: NHMS TEST
 Pricing Version Name: CASE 36092
 Plan Name: CASE 36092
 Lot:
 Request Description: CASE 38158
 Selector Type: F
 Category: CERAMIC TILE
 Area/Option/Window: KITCHEN

LINE INFORMATION

Line Description: COMBINED AREAS
 Installation Instructions:
 Install Type: CUSTOM
 Limit Products to Home Buyer's Pricing Version:

Style: MAKE A STATEMENT
 Supplier: SHAW INDUSTRIES
 Private Style: MAKE A STATEMENT
 Private Supplier: SHAW INDUSTRIES
 Color: CATALINA (F)
 PC: 01
 Units: SY
 Width: 12.00 Length: 204.00

PRICING

Primary Product:
 Create Line Item For Order Entry:

No Tax Sales Tax Material Only
 Use Tax Sales Tax Material & Labor

Percent: 10.54%

Cost: 27.00
 Use Tax: 2.85
 Labor: 0.00 F8
 GP: 0.00%
 Unit Price: 29.85
 Quantity: 272.00 F8

Browse Takeoffs

Area	StandardFloor	Area Type	O.C.T.	CPT 12
CHAPEL	CARPET	SA	N	10.00
MASTER BEDROOM	CARPET	SA	N	10.00
GREAT ROOM	CARPET	SA	N	10.00
KITCHEN	CARPET	SA	N	10.00

Takeoffs

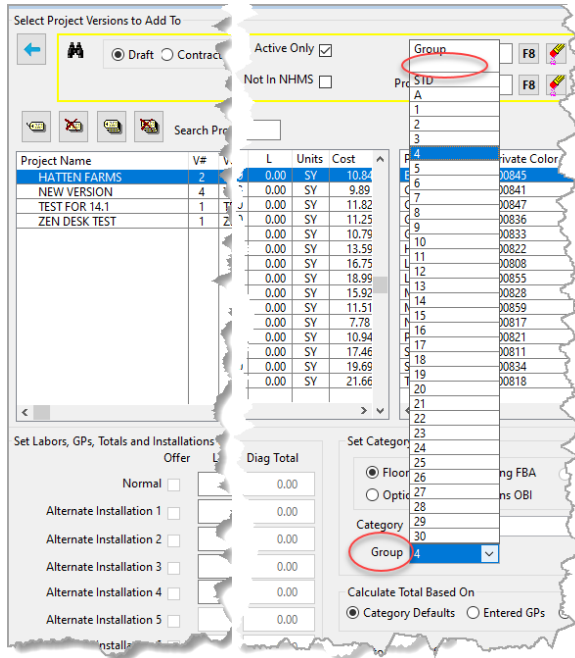
Columns for Sizes and Units have been added to the Takeoffs Browse Screens.

Utilities

Add Products

Utilities>Add Products

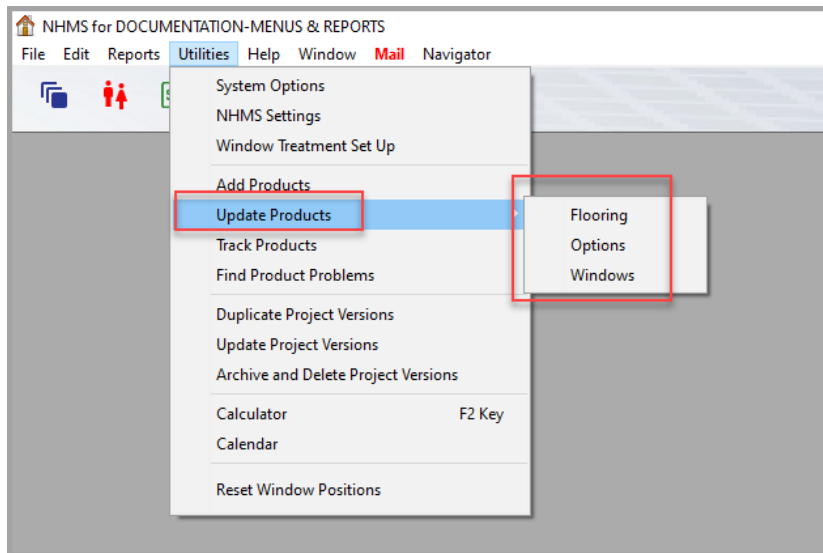
The ability to select a blank group has been added to the Group dropdown menu.



Update Products

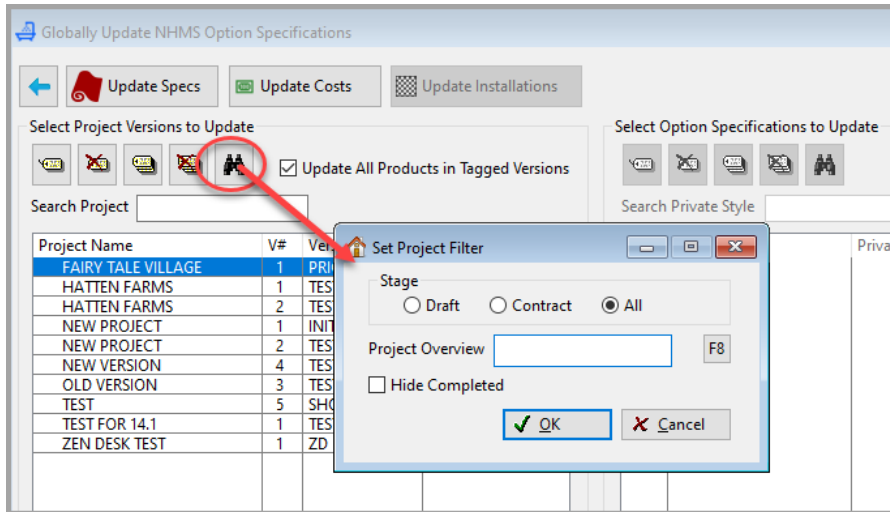
Utilities>Update Products

Update Products is no longer one screen with tabs. Each tab has its own screen and is selected from the menu under Utilities.



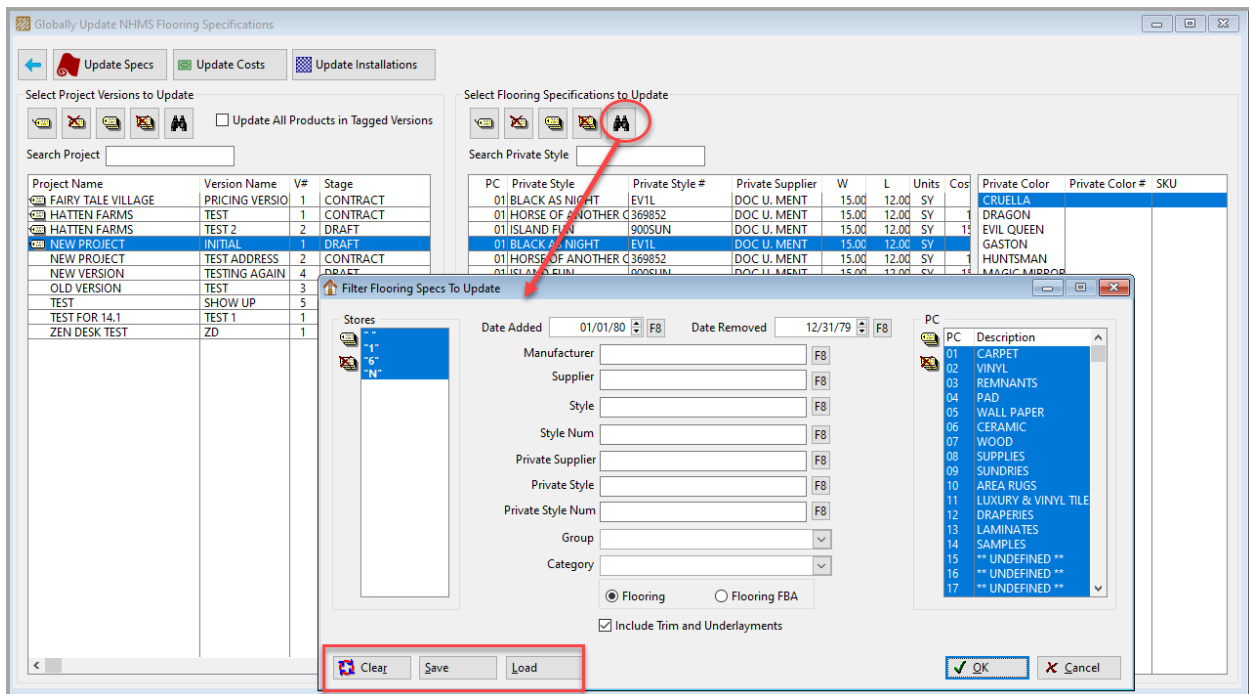
Select Project Version to Update

The Find screen for Select Project Version to Update area includes Stage, Project Overview. It also gives the user the ability to hide Completed Projects.

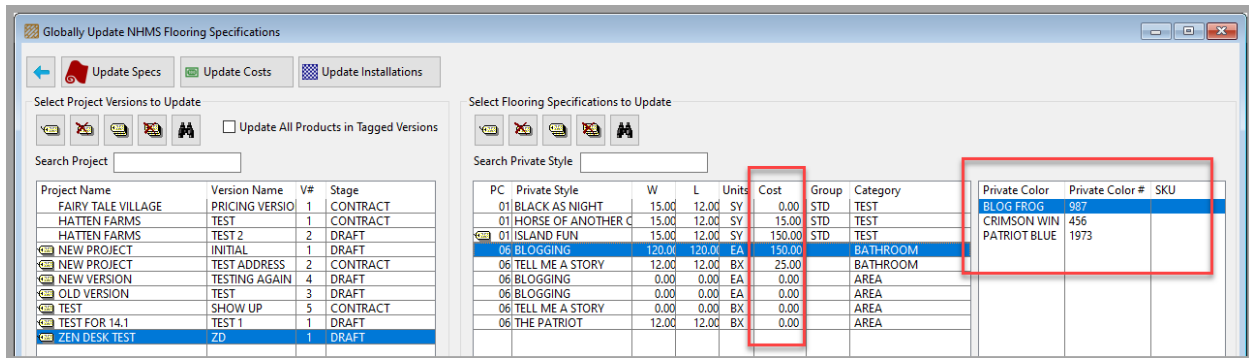


Select Specifications to Update

On the Flooring and Options screen in the Select Specifications to Update area, the Find screen can now be filtered by Product fields, PC, Store, Category, and Group. The filter can also be [saved and loaded](#).

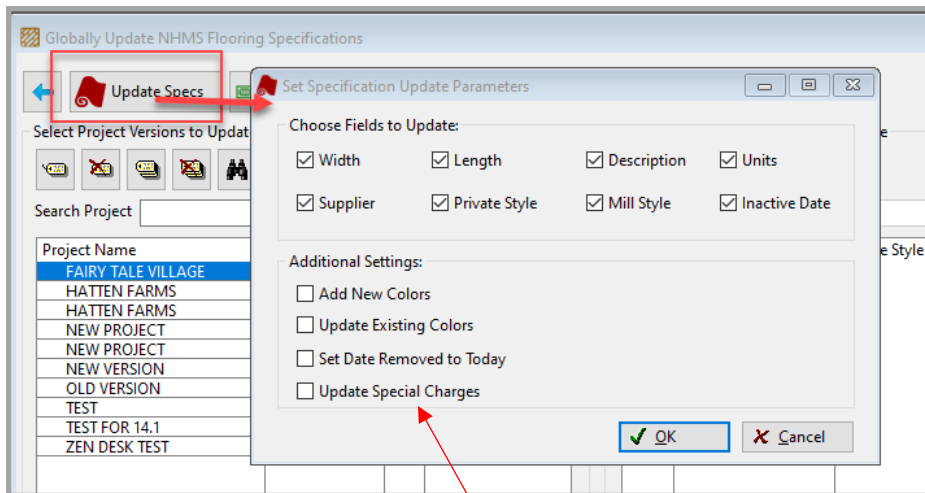


Cost Column and a Color Browse have been added to this area.



Update Specs

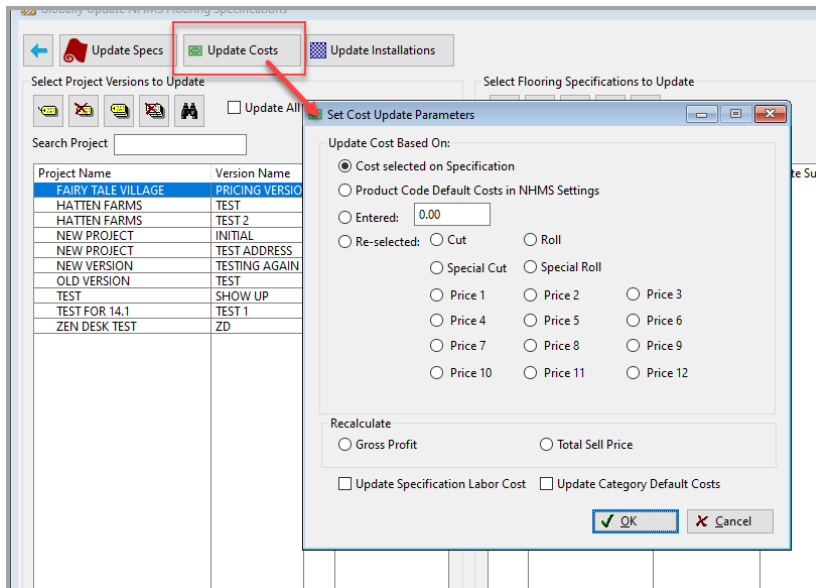
This button is now included on the Update Products screen for each of the three menu options. This screen includes checkboxes to select the fields to update and which settings will be updated.



The ability to globally update Special Charges has been added to this screen.

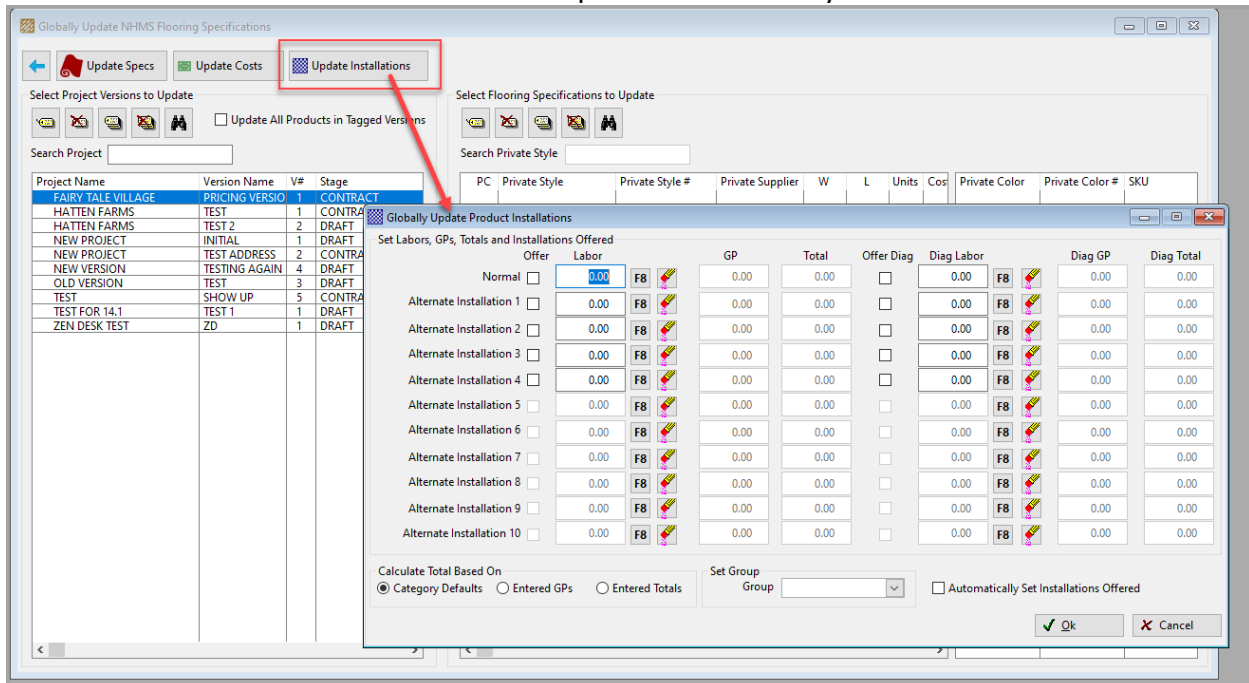
Update Cost

This screen allows the user to choose what the updated cost will be based on and how the cost is to be recalculated. Update Specification Labor Cost and Update Category Default Costs are also included on this screen.



Update Installations

This screen gives the user the ability to update Gross Profit, Total, and Use for Alternate Installations. This screen also includes Group and Automatically Set Installations Offered.



The Update Installations button will be grayed out if Update All Products in Tagged Versions is checked.

This screen is not available for Trim and Underlayment Products.

For flooring, Alternative Installation is only available for Options 1-4.

Gateway (19.0.2)

Items

Items will insert/update the length and width by following the rules below:

Insert - the Actual Length and Width will be populated if data available

Update - the Actual Length and Width will be populated if data available and the product record has no data in those fields