



RFMS Support Basics

*Exploring what
Zendesk can do
for you!*

- *With Debbie Kennedy, Joanna Spicer, and Corbin Brantley*

Support Departments



- Core
 - RFMS (Order Entry, Accounting, Etc.)
 - Add-On Modules
- Measure/App Team
 - Measure Desktop
 - Measure Mobile / RFMS Mobile / CRM
- Technical Team
 - “Techy” topics (Migration, Exception Error)
 - Migrations (coordinated through CSM)
- EC
 - B2B/Ecommerce
 - Gateway
- BI – Business Insights

How to find us?

~Call us!

Core: 888-215-8665

Measure/Apps: 205-582-0403

Tech: 205-582-0600



E-mail us!

Core or Tech: **Help@rfms.com**

Measure/Apps: **MeasureSupport@rfms.com**

EC: **B2B@rfms.com**

BI: **BI@rfms.com**

How to find us?

Core Website (Ticket or Chat):

RFMSINC.ZENDESK.COM

- or -

Click support at RFMS.COM

How to find us?

Signing into RFMSinc.Zendesk.com

1 – E-mail addresses are our unique identifiers

All users should have their own accounts (including IT).

2 – New users can sign up for support

You may receive E-mail to confirm organization information.

3 – Obtaining password if previous ticket exists

Either option works.

The screenshot shows the 'Sign in to Help Desk' interface. On the left, there are three social login buttons: 'Sign in with Twitter', 'Sign in with Facebook', and 'Sign in with Google'. On the right, there are input fields for 'Email' and 'Password', a 'Stay signed in' checkbox, and a 'Sign in' button. Below the 'Sign in' button, there are links for 'I am an Agent' and 'Forgot my password'. A yellow box with a blue '2' contains the text 'New to Help Desk? Sign up'. Below this box, there is a link 'Have you emailed us? Get a password' and a paragraph of text: 'If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.' A blue arrow points from the 'Forgot my password' link to the 'Get a password' link, and another blue arrow points from the 'Get a password' link to the 'New to Help Desk? Sign up' box. A blue circle with the number '1' is placed next to the 'Email' input field, and a blue circle with the number '3' is placed next to the 'Forgot my password' link.

Sign in to Help Desk

Sign in with Twitter

Sign in with Facebook

Sign in with Google

Email

Password

Stay signed in

Sign in

I am an Agent

Forgot my password

2 New to Help Desk? Sign up

Have you emailed us? [Get a password](#)

If you've communicated with our support staff through email previously, you're already registered. You probably don't have a password yet, though.

There's
no
place
like
home
(page)

The screenshot shows the user home page for RFMS on a Zendesk help center. The URL is <https://rfmsinc.zendesk.com/hc/en-us>. The page features a header with logos for RFMS, MEASURE BY RFMS, and BI. A navigation bar includes links for Community, Submit Support Ticket, and a user profile dropdown menu with options: My activities, My profile, Change password, and Sign out. A search bar is prominently displayed in the center. Below the search bar, there are several categorized sections: RFMS Core (including Order Entry, Sales Floor Assistant, Inventory, Products, Accounting, Human Resources...), Productivity Tools, General (including Help Files, Misc., Database/System, Forms), Documentation (including Technical Documents, Update Documents, and Release Notes), Announcements, Bits N Bytes, and Tips, Videos and Webinars, and Buying Groups. A section for Promoted articles lists several items: Coffee and Conversation: Summer Session, Spring Webinars PLUS introducing Conversations and Coffee!, PPP Loan Processing in RFMS - Video and Powerpoint, Families First Coronavirus Response Act in RFMS - Webinar, Working Remotely with RFMS - Webinar, and Current Version Update Document. A red Help button is located in the bottom right corner.

https://rfmsinc.zendesk.com/hc/en-us

RFMS MEASURE BY RFMS BI

Community Submit Support Ticket User's Name

My activities
My profile
Change password
Sign out

Search

RFMS Core
Includes the following sections: Order Entry, Sales Floor Assistant, Inventory, Products, Accounting, Human Resources...

Productivity Tools

General
Includes the following Sections: Help Files, Misc., Database/System, Forms

Documentation
This category includes Technical Documents, Update Documents, and Release Notes.

Announcements, Bits N Bytes, and Tips

Videos and Webinars

Buying Groups

Promoted articles

Coffee and Conversation: Summer Session

Spring Webinars PLUS introducing Conversations and Coffee!

PPP Loan Processing in RFMS - Video and Powerpoint

Families First Coronavirus Response Act in RFMS - Webinar

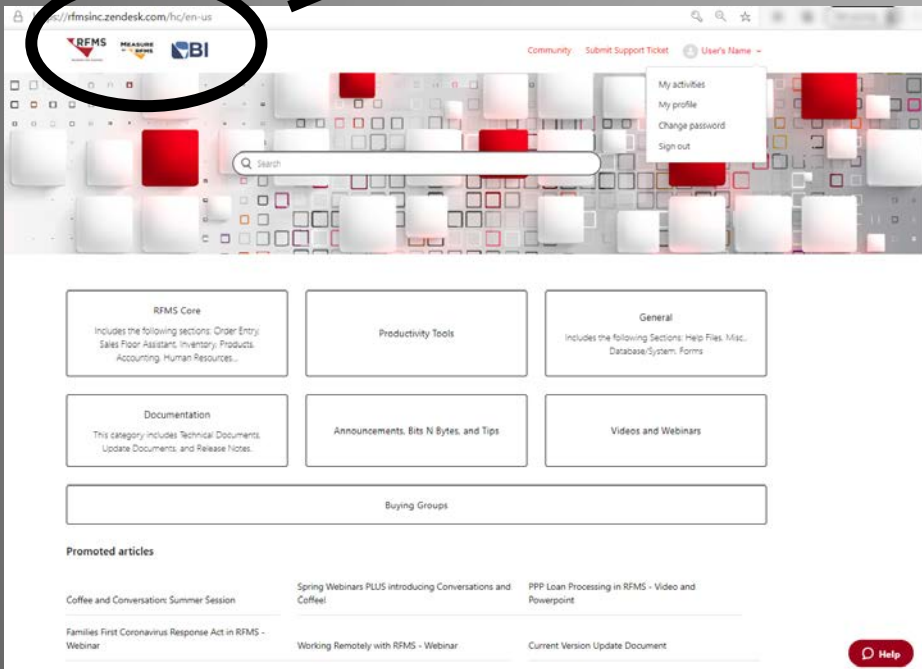
Working Remotely with RFMS - Webinar

Current Version Update Document

Help

Links to other knowledgebases

<https://rfmsinc.zendesk.com/hc/en-us>



- Default is Core/Tech/EC
- Measure / Apps
- Business Insights

Account Information

- My Activities
- Personal Tickets
- Organization Tickets
- My Profile
- Add Pics/Info
- Change Password
- Sign Out

The screenshot shows a user interface with a navigation bar at the top. On the left, there is a 'Submit Ticket' button. On the right, there is a user profile section with a person icon and the text 'User's Name' followed by a dropdown arrow. A large white dropdown menu is open, listing the following options: 'My activities', 'My profile', 'Change password', and 'Sign out'. A black arrow points from the 'User's Name' dropdown to the menu. Below the menu, a smaller version of the same menu is visible, circled in black. The main content area below the navigation bar contains several categorized sections: 'RFMS Core' (with sub-sections like Order Entry, Sales Floor Assistant, etc.), 'Productivity Tools', 'General' (with sub-sections like Help Files, Misc., Database System, Forms), 'Documentation' (with sub-sections like Technical Documents, Update Documents, etc.), 'Announcements: Bits N Bytes, and Tips', 'Videos and Webinars', and 'Buying Groups'. At the bottom, there is a 'Promoted articles' section with several article titles and a 'Help' button in the bottom right corner.

History of support tickets



My requests

My requests Requests I'm CC'd on Organization requests

- My activities
- My profile
- Change password
- Sign out

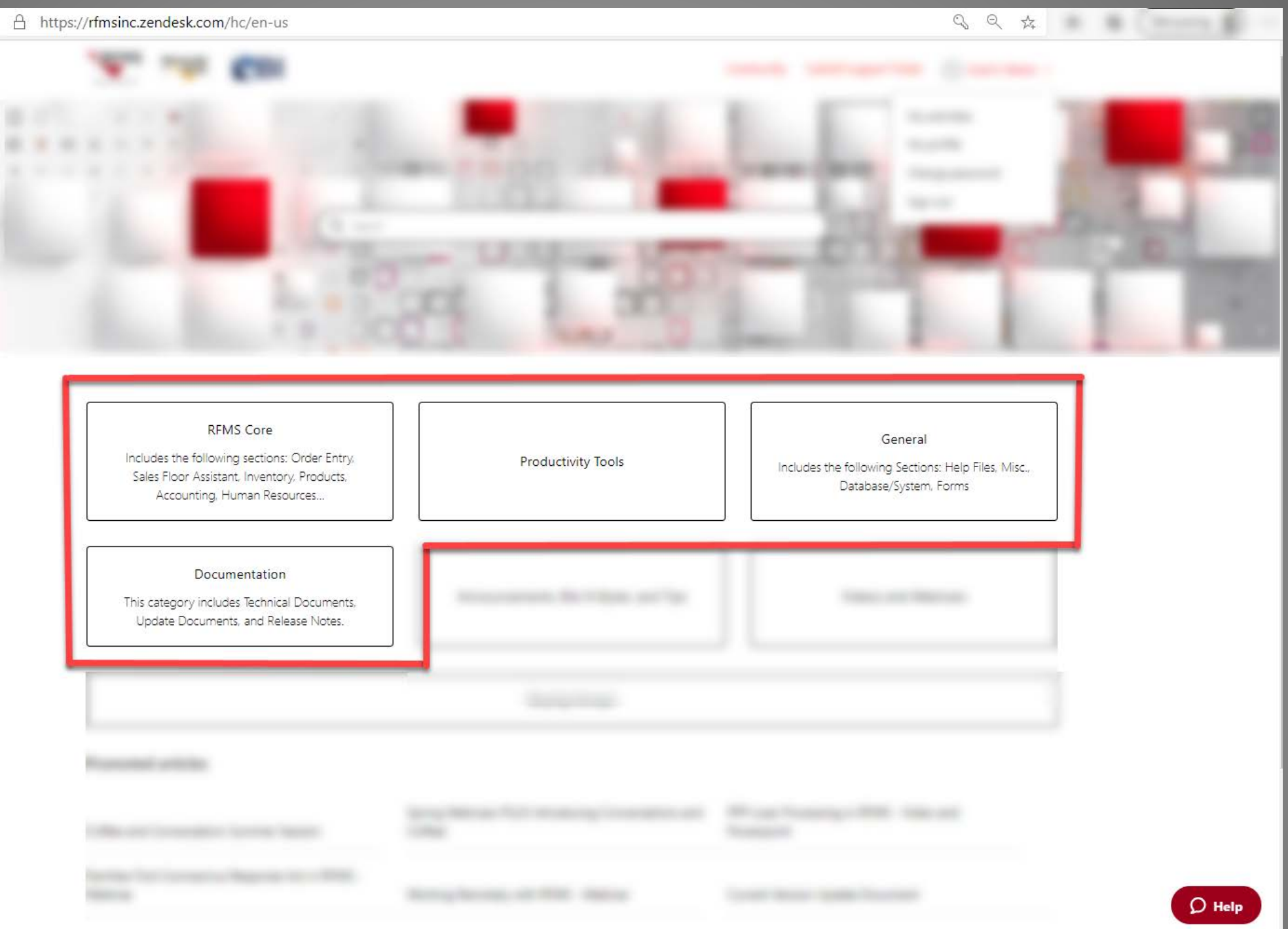
Search requests

Status: Any

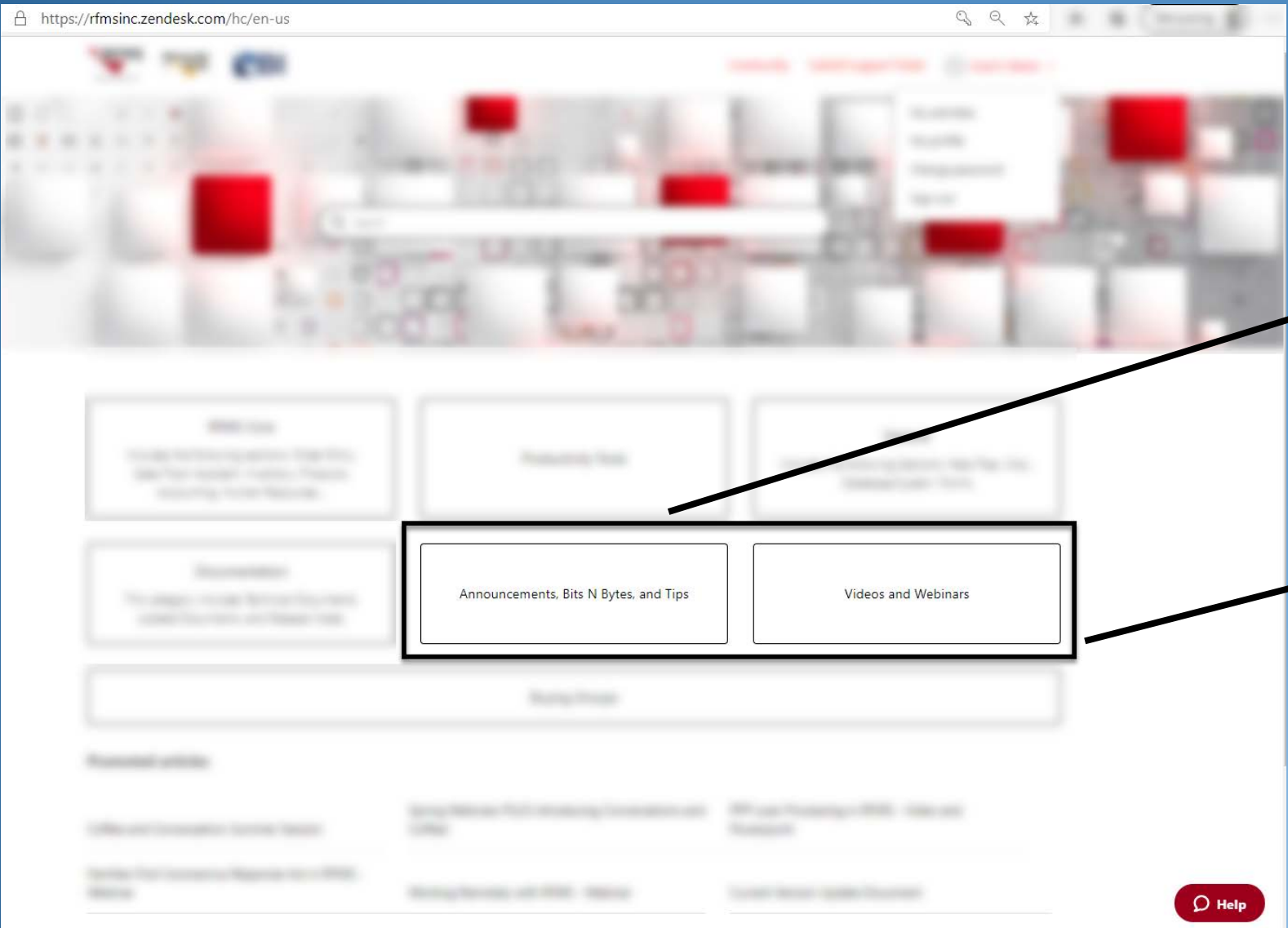
Subject	Id	Created	Last activity	Status
Chat - None Status Reporting	#2533217	21 hours ago	18 hours ago	solved
Chat with Batch Jobcosting	#2529531	22 days ago	21 days ago	solved
Store Code Error	#2527689	1 month ago	1 month ago	solved
Journal locked when it is not	#2527688	1 month ago	1 month ago	solved

- My Requests
 - “My Tickets”
- Requests I’m CC’d On
 - Involved, but didn’t initiate ticket
- Organization Requests
 - All of the tickets from the company

C
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“Must” Click Boxes



Announcements, Bits N Bytes, and Tips

Videos and Webinars

Rounding out the Home Page's knowledgebase

1. Search Core, Tech, EC topics

2. Promoted Articles (Topical)

3. Help – Search + Chat

The screenshot shows the home page of the RFMS Inc. Zendesk help center. The URL in the browser is <https://rfmsinc.zendesk.com/hc/en-us>. The page features a search bar at the top, which is highlighted with a blue circle containing the number '1'. Below the search bar, there is a grid of promoted articles. A blue circle with the number '2' is placed over the 'Promoted articles' section header. At the bottom right of the page, there is a red 'Help' button with a speech bubble icon, highlighted with a blue circle containing the number '3'. The promoted articles section includes several articles with titles such as 'Coffee and Conversation: Summer Session', 'Spring Webinars PLUS introducing Conversations and Coffee!', 'PPF Loan Processing in RFMS - Video and Powerpoint', 'Families First Coronavirus Response Act in RFMS - Webinar', 'Working Remotely with RFMS - Webinar', and 'Current Version Update Document'.

Client Submissions

Community Submit Support Ticket

- Community
 - User Driven
 - Development Review

- Submit Support Tickets
 - Department Selection
 - Attachments Allowed

The screenshot shows the RFMS Zendesk community page. The URL is https://rfmsinc.zendesk.com/hc/en-us. The page features a navigation bar with the RFMS logo, 'MEASURE', and 'BI' icons. A search bar is present. A callout box highlights the 'Community' and 'Submit Support Ticket' links in the top navigation. Below the navigation, there are several content categories: RFMS Core (Order Entry, Sales Floor Assistant, Inventory, Products, Accounting, Human Resources...), Productivity Tools, General (Help Files, Misc., Database/System, Forms), Documentation (Technical Documents, Update Documents, Release Notes), Announcements, Bits N Bytes, and Tips, Videos and Webinars, and Buying Groups. A 'Promoted articles' section is at the bottom, listing various webinars and documents. A 'Help' button is in the bottom right corner.

COMMUNITY PAGE

- Create New Post
 - Detail Oriented
 - Pictures
 - Business Case
- Vote/Comment on Current Suggestions

The screenshot shows a community page interface. At the top left, there is a dropdown menu labeled 'Community Topics' with a blue arrow pointing to the right. To the right of this menu is a black button with the text 'New post'. Below these elements is a grid of 12 topic cards arranged in 4 rows and 3 columns. Each card contains a title, a description, and the number of posts and followers. The cards are: 1. 'Released in 19.99.0 thru 19.99.4' (14 posts, 3 followers); 2. 'Completed in previous versions' (80 posts, 18 followers) with the subtext 'These are available to you now.'; 3. 'Notifications' (13 posts, 2 followers); 4. 'Order Entry-Customer Orders' (106 posts, 20 followers); 5. 'Order Entry-Claims and Quotes' (22 posts, 5 followers); 6. 'Order Entry-Printing Documents and Reports' (57 posts, 3 followers) with the subtext 'Includes Invoices, Quotes, Picking Tickets, Work Orders, Receipt Recap Report, Sample Status Report'; 7. 'Products/EC' (47 posts, 8 followers); 8. 'Accounting' (86 posts, 18 followers); 9. 'Inventory' (67 posts, 12 followers); 10. 'Purchase Orders- From Inventory or Order Entry'; 11. 'Human Resources and Direct Deposit'; 12. 'Sales Reports'.

Topic	Posts	Followers
Released in 19.99.0 thru 19.99.4	14	3
Completed in previous versions <small>These are available to you now.</small>	80	18
Notifications	13	2
Order Entry-Customer Orders	106	20
Order Entry-Claims and Quotes	22	5
Order Entry-Printing Documents and Reports <small>Includes Invoices, Quotes, Picking Tickets, Work Orders, Receipt Recap Report, Sample Status Report</small>	57	3
Products/EC	47	8
Accounting	86	18
Inventory	67	12
Purchase Orders- From Inventory or Order Entry		
Human Resources and Direct Deposit		
Sales Reports		

Submit a request

Please select the type of request you are submitting.

RFMS Core Support Request

CC

IT, Bookkeeper, Owner, etc.

Subject *

MEANINGFUL summary of question or problem

Description *

"E-mail Preferred" or "Phone call preferred xxx-xxx-xxxx ext xxx"

I am trying to close my journal for last month and I am getting an error: General Ledger/Journal is being closed on another workstation.

If this is a Support Request, please enter the details below. A member of our support staff will respond as soon as possible. If this is a Program Suggestion, please ensure that you have selected the appropriate request form above and enter the details below. These are taken in for consideration, but are not necessarily responded to.

Version *

-

Module

-

Attachments

Add file or drop files here

PicOfErrorMessage.jpg

x

PDFofErrorMessage.pdf

x

Submit

Suggested articles

General Ledger/Journal is being closed on another workstation - GL is Locked

Message - Receipts not posted for deposit for month to be closed, when running journal close

Service cost is not posting when jobcosting orders.

[Ways to skip the Discount Rate field when it is 0](#)

When a Purchase Order is Created from an Order, the Unit Price is not Pulling Over

Why is my property not appearing in the list when creating an order

How to: View GL Dates in Accounting

Balancing Checking Account / Bank Register

ATTENTION! Your STANDARD FILE IS UNBALANCED

Tips and Tricks for ERM

19.99.5.27325

19.99.4.27233

19.99.3.26921

19.99.2.26728

10.00.1.26620

Accounting

Accounts Payable

Accounts Receivable

Banking

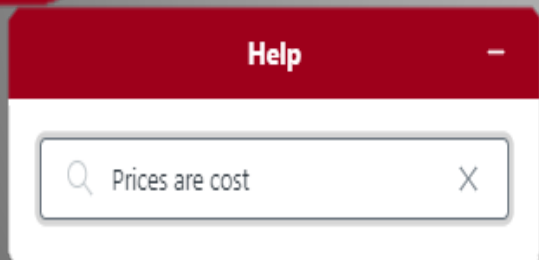
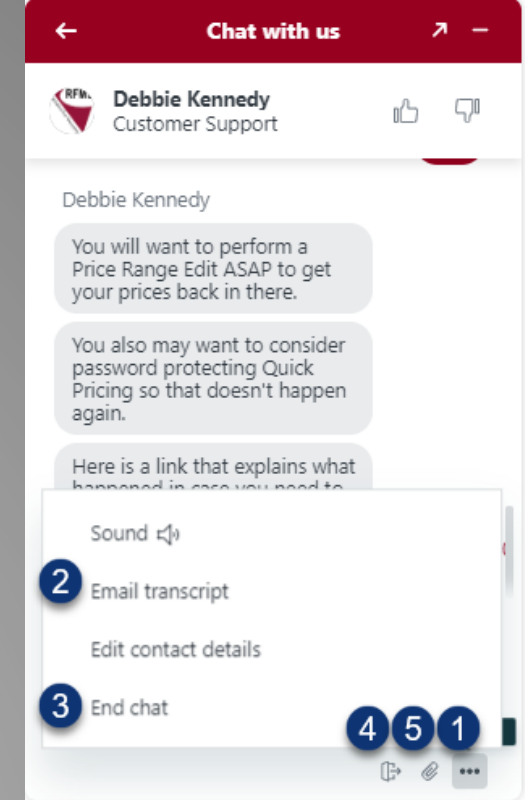
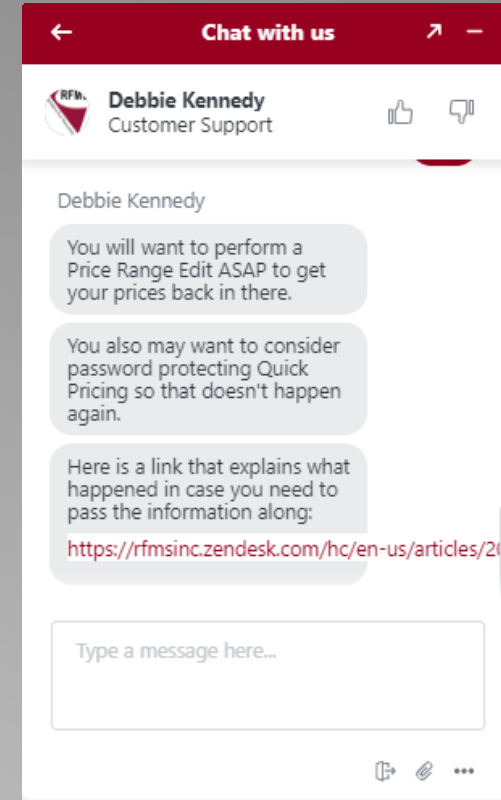
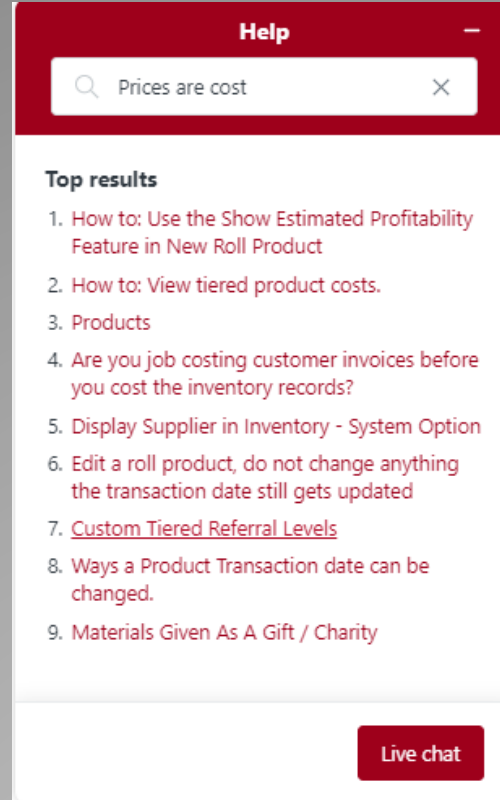
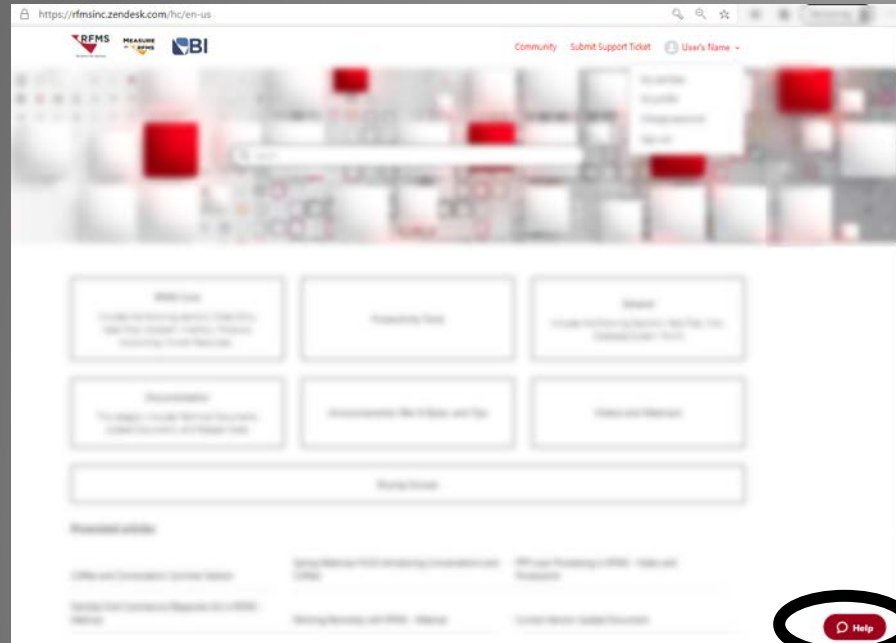
Bidpro

Citrix

Submitting Support Requests

- Department
- Meaningful subject
 - Suggested Articles
- Description
 - Preferred Communication
 - Question/Issue
- Version Matters
- Attachments

Feel like chatting?



- Top Potential Solutions Offered via Links
- Option for Live Chat

- Live Chat with agent
- On phone with other clients
- Links to articles

1. Pull up menu
2. E-mail Transcript
3. End Chat
4. Exit
5. Attach pics

Support.MeasureFlooring.com

1. Measure Desktop
2. Measure Mobile
3. RFMS Online Services
4. Community
5. RFMS API
6. Support Request

The screenshot shows the Measure Flooring Help Center website. The URL in the browser is <https://support.measureflooring.com/hc/en-us>. The page features the Measure Flooring logo (MEASURE BY RFMS) and navigation buttons for "Submit a request" and "Sign in". A search bar is present below the logo. The main content area is divided into two rows of numbered tiles. The first row contains three tiles: "1 Measure Desktop" (with a ruler and pencil icon), "2 Measure Mobile" (with a mobile phone icon), and "3 RFMS Online Services" (with a cloud and gear icon). The second row contains three tiles: "4 Community" (with a speech bubble icon), "5 RFMS API" (with a gear icon), and "6 Submit Request" (with a globe icon). On the right side of the page, there is a vertical sidebar with logos for RFMS, RFMS Apps, MEASURE BY RFMS, and BI. A blue arrow points from the dropdown menu of the Measure Flooring logo to the sidebar area. At the bottom right, there is a "Support" button with a question mark icon. The footer contains the text "© Measure Flooring".

MEASURE DESKTOP

Measure Flooring > Measure Desktop

Search

Measure Desktop

Estimating software for computers running Windows

Video Tutorials

1. Getting Started
2. Setting up the Product List
3. Drawing the Floor Plan
4. Room Enhancements and Add-Ons
5. Working in Layout Mode

Article Navigation

Table of Contents

1. General Measure Desktop Information

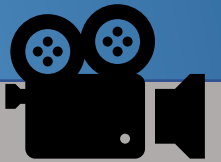
- ★ Measure Desktop Release Notes
- ★ System Requirements for Measure
- Measure 15.0.3691 On-demand Release Notes
- Measure 64-bit Beta Release Notes
- Measure Desktop Known Issues
- Measure Editions

Free Form Search!



Submit a request to create a new support ticket

Sign in to create support tickets and review ticket history



VIDEO TUTORIALS!!



Detailed Support Articles

Don't forget about chat!

Support

RFMSapps.Zendesk.com

1. CRM
2. RFMS Mobile
3. RFMS Online Services
4. Measure Mobile
5. API
6. Community

The screenshot shows the RFMS Apps Help Center interface. At the top, there is a navigation bar with the RFMS Apps logo on the left, a search bar in the center, and 'Submit a request' and 'Sign in' buttons on the right. Below the navigation bar, the main content area is divided into two sections: 'Helpful Links' and a vertical sidebar. The 'Helpful Links' section contains six numbered tiles: 1. CRM (green icon), 2. RFMS Mobile (red icon), 3. RFMS Online Services (blue icon with a gear), 4. Measure Mobile (orange icon), 5. RFMS API (blue icon with a gear), and 6. Community (blue icon with speech bubbles). The vertical sidebar on the right contains four logos: RFMS, RFMS Apps, MEASURE BY RFMS, and BI. A blue arrow points from the 'RFMS Apps' dropdown menu in the top navigation bar to the 'RFMS Apps' logo in the sidebar.

BIR.Zendesk.com



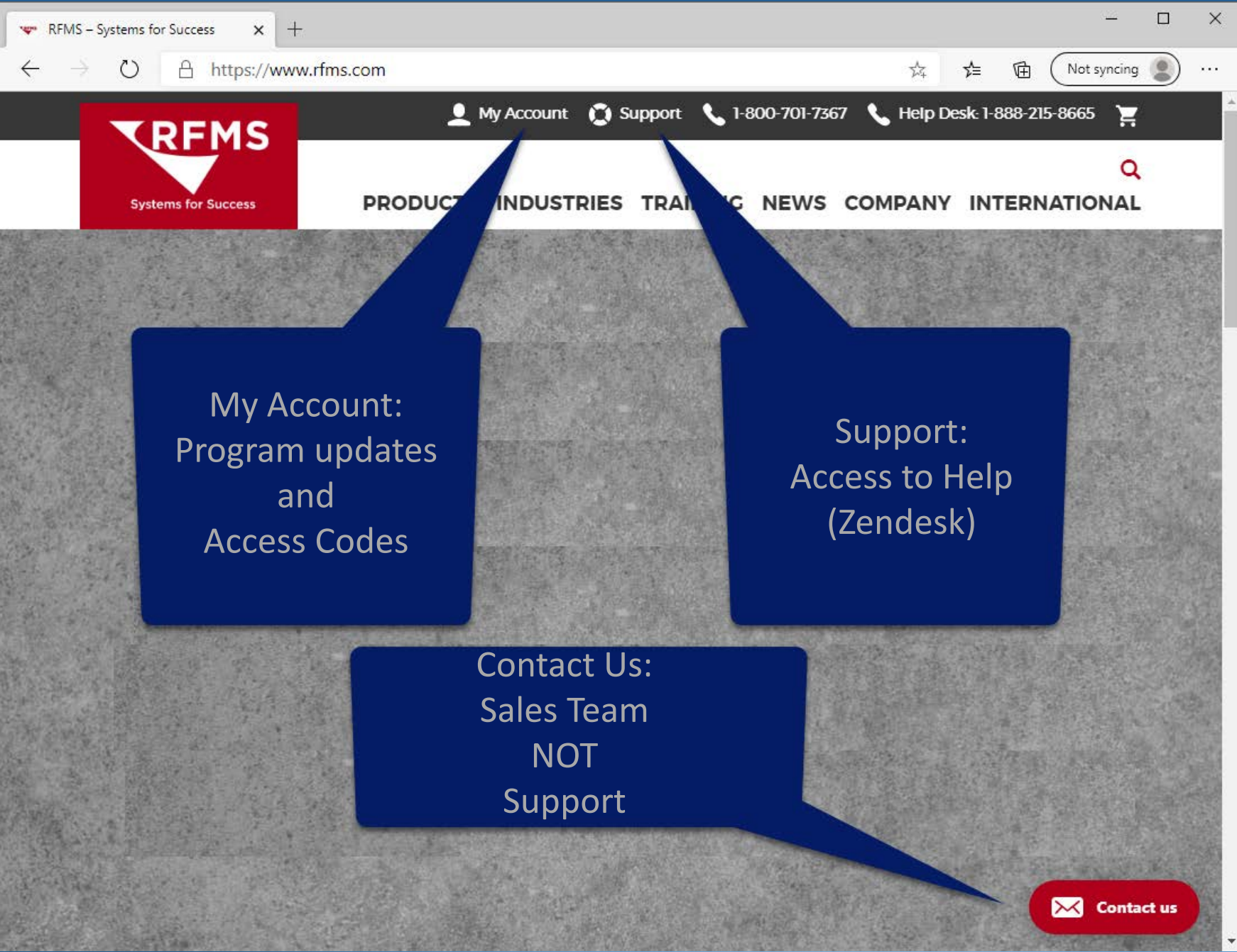
[Sign in](#)

[Getting Started](#)

[Dashboards](#)

[Videos and Webinars](#)

[FAQs](#)



My Account:
Program updates
and
Access Codes

Support:
Access to Help
(Zendesk)

Contact Us:
Sales Team
NOT
Support

RFMS.com

- My Account
 - Updates
 - Access Codes
- Support
 - Zendesk
- Contact Us
 - SALES contact



- If you receive voice mail, leave a message
- If ticket is created, no need for a second ticket
- MEANINGFUL subjects
- Include preferred method of contact
 - If automated phone system, include extension number
- Provide full details (including full error messages)