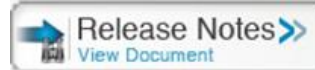
A large decorative graphic on the right side of the page consists of three overlapping, wavy bands. The top band is light grey, the middle band is red, and the bottom band is black. The bands curve upwards from left to right. The text "Version 19.99 Payroll Update Update Document" is overlaid on the red and black bands.

**Version 19.99
Payroll Update
Update Document**

© RFMS, Inc.
3073 Palisades Court
Tuscaloosa, AL 35405

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.

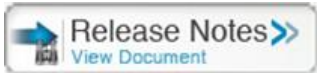


[For directions on loading updates to the RFMS software, click here.](#)



















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.






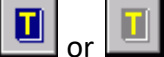


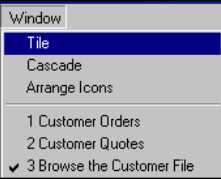



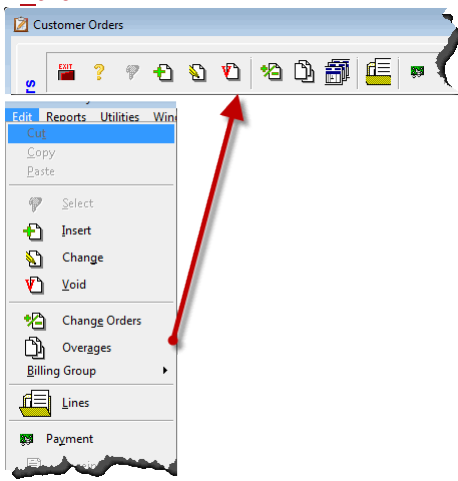
Documentation Conventions

 Notes:	Indicates extra Information
	This symbol indicates a best practice or an example.
<u>Setup>System Setup</u>	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 data-bbox="594 1661 1328 1759" 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>
----------------------	---

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. <i>>Edit></i> 

If 18.99 was the last update installed, please check [Update Documents](#) for changes made in Versions 19.0.

Payroll Update

This version includes the Payroll Update for 2020.

This includes any Federal Tax changes for the US and Canada.

The following areas had tax table changes and form changes. Please double check all state taxes before running payroll.

Other states will be added as their changes are published.

United States

Illinois
Iowa
Kentucky
Maine
Massachusetts
Michigan
Minnesota
Missouri
New Mexico
North Carolina
North Dakota
Ohio
Oklahoma
Oregon
Rhode Island
South Carolina
Vermont

Canada

Alberta
British Columbia
Manitoba

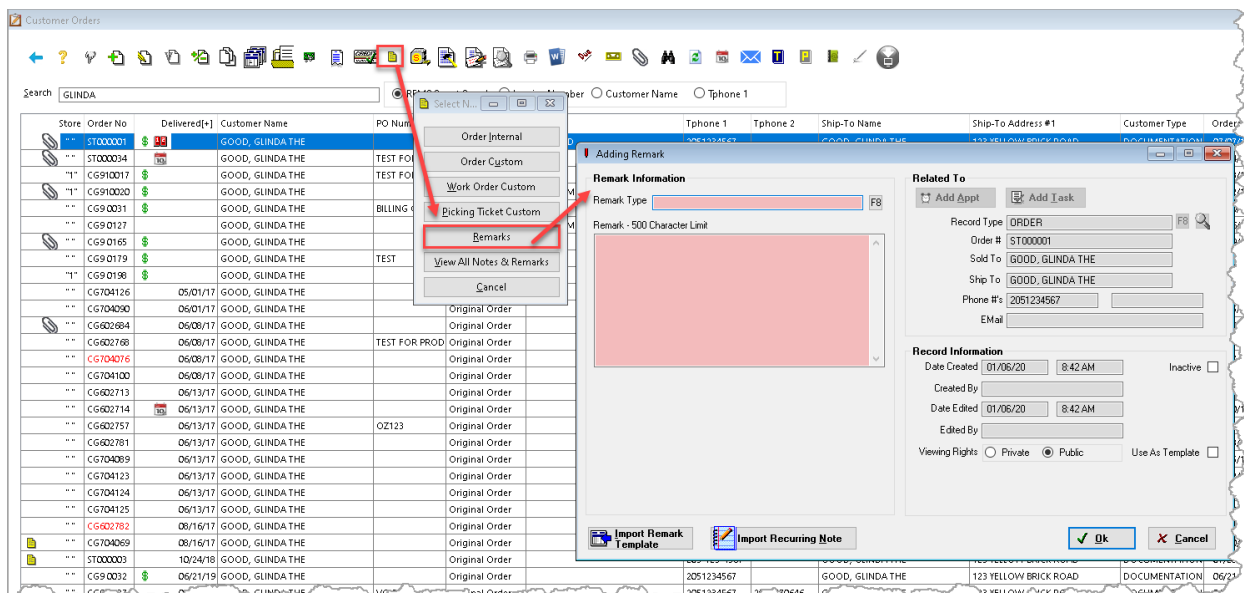
New Brunswick
Newfoundland and Labrador
Northwest Territories
Nova Scotia
Nunavut
Ontario
Outside Canada (OC)
Prince Edward Island
Quebec
Saskatchewan
Yukon

System-Wide

Remarks

Remarks are notations about a record; these can be printed on several reports. Because of that, it is recommended to keep them succinct. These are called remarks to differentiate them from the notes in RFMS.

The ability to create and view Remarks has been added for non-CMM users. Remarks can be added in Customer Orders, Quotes, Claims, and Purchase Orders.



Order Entry

Customer Orders

Work Order

The ability to import Internal Line Notes has been added.

Browse Work Order Lines for Invoice: ST000001

Area	Product Code & Style	Line Number	Area	Style	Color	Width	Length	Quantity	PC
	WOTSOM YELLOWSTONE			YELLOWSTONE		0'0"	0'0"	150.00	13
	ROLL HIST TEST			ROLL HIST TEST		12	10.00	13.33	01
	HORSE OF ANOTHER COL			WICKED		15	10.00	16.67	01
	TELL ME A STORY			FAIRY BLUE		0'0"	0'0"	2.00	06
	THE PATRIOT			REDCOATS		0'12"	0'12"	75.00	06

Number of Lines: 5 Lines Tagged: 5

Tphone 2	Ship-To Name	Ship-To
	GOOD, GLINDA THE	123 YEL
2056570646	GOOD, GLINDA THE	123 YEL
2056570646	GOOD, GLINDA THE	123 YEL
2056570646	GOOD, GLINDA THE	123 YEL
2056570646	GOOD, GLINDA THE	123 YEL
2056570646	GOOD, GLINDA THE	123 YEL

Import Notes

Import Notes into Tagged Work Order Lines from:

Order Line Notes

Internal Order Line Notes

Ok Cancel

The Carton Qty has been added to the Work Order.

01/06/20 11:01 AM Page 1
Printed By: SSentell

WORK ORDER

Sold To GLINDA THE GOOD 123 YELLOW BRICK ROAD EMERALD CITY, OZ 123456		Install At GLINDA THE GOOD 123 YELLOW BRICK ROAD EMERALD CITY, OZ 123456	
Order Number ST000001	Order Date 07/07/17	PO Number	Tphone 1 2051234567

Area	PC Style/Item	Color/Description	Inventory #	Units	Width	Length	Ship Wt.	Quantity	Rate	Control #
Customer Order Line Number: 0001	13 WOTSOM YELLOWSTONE	YELLOWSTONE	W0000198	SF	0'0"	0'0"	150.00	150.00	120R1P30	
Customer Order Line Number: 0002	01 ROLL HIST TEST	ROLL HIST TEST	ROLL HIST TE	SY	12'0"	10'0"	13.33	13.33	V84D41V6L	

Cartons: 150.00

No Carton/Buying Qty is available

Billing Groups

Billing Notice

The USA- A line was added called Total Sales Tax that includes all the Sales Tax on all the orders in the Billing Group.

STORE NAME
112 MAIN ST
ANYWHERE, USA 55555
(205) 123-4456

Page 1

CG602611

Billing Notice 1

Sold To		Ship To	
CREDIT CHECK CUSTOMER CITY, AL 35045		CREDIT CHECK CUSTOMER CITY, AL 35045	

Original Contract Number	Telephone	Original PO Number	Contract Date
CG602611	1234560789		09/29/16

Billing	Reference	Date	Purchase Order Number	Contract	Billed
None	CG602611			\$1,125.00	\$0.00
1	CG602636	07/16/19		\$200.55	\$200.55
1	CG602736	05/17/17		\$4,125.00	\$4,125.00
1	CG602757	06/13/17	OZ123	\$600.00	\$600.00

Previously Billed: 4,925.55 Current Billed: 0.00 Total Billed: \$4,925.55	<table style="width: 100%;"> <tr> <td style="text-align: right;">\$6,050.55</td> <td style="text-align: right;">\$4,533.99</td> </tr> <tr> <td>Total Misc Tax:</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Total Sales Tax:</td> <td style="text-align: right;">391.56</td> </tr> <tr> <td>Retainage (0.00%):</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Total Finance Charges:</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Less Discounts:</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Payments Received:</td> <td style="text-align: right;">-4,925.55</td> </tr> <tr> <td>Current Due:</td> <td style="text-align: right;">\$0.00</td> </tr> </table>	\$6,050.55	\$4,533.99	Total Misc Tax:	0.00	Total Sales Tax:	391.56	Retainage (0.00%):	0.00	Total Finance Charges:	0.00	Less Discounts:	0.00	Payments Received:	-4,925.55	Current Due:	\$0.00
\$6,050.55	\$4,533.99																
Total Misc Tax:	0.00																
Total Sales Tax:	391.56																
Retainage (0.00%):	0.00																
Total Finance Charges:	0.00																
Less Discounts:	0.00																
Payments Received:	-4,925.55																
Current Due:	\$0.00																

Canada- A line was added called GST/PST or PST that includes all the taxes on all the orders in the Billing Group.

WHEAT'S CARPET ONE-FLOOR/HOME
51 MCFARLAND BLVD
FAX: 205-449-2311
BRITISH COLUMBIA/HST, BC G5F 5D5
Telephone: 205-349-2233 Fax: 205-349-3393

Page 1

CG903203

Billing Notice 1

Sold To		Ship To	
ARROWOOD, JARETT (205) 454-5166 OR (205) 393-93		ARROWOOD, JARETT	

Billing	Reference	Date	Purchase Order Number	Contract	Billed
None	CG903238			\$4.41	\$0.00
None	CG903239			\$18.66	\$0.00
None	CG903240			\$3.91	\$0.00

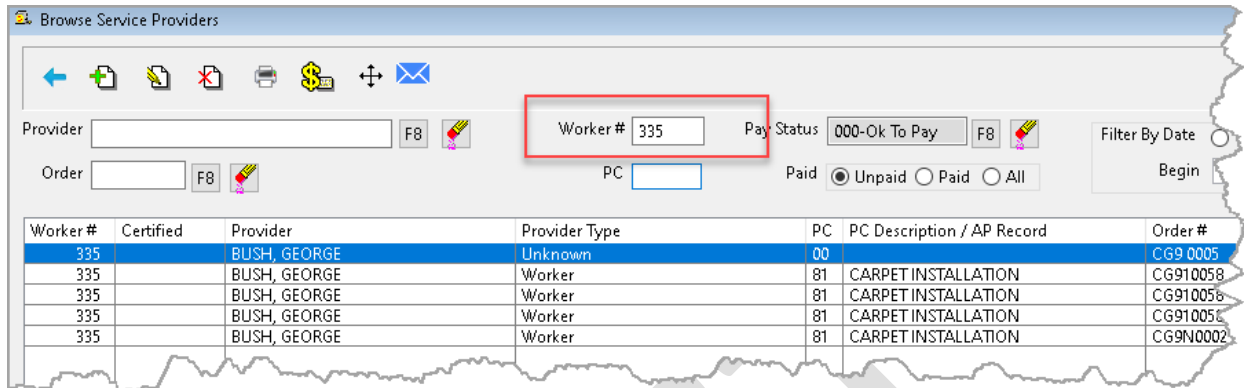
Previously Billed: 29.41 Current Billed: 0.00 Total Billed: \$29.41	<table style="width: 100%;"> <tr> <td style="text-align: right;">\$2,529.19</td> <td style="text-align: right;">\$-298.81</td> </tr> <tr> <td>PST:</td> <td style="text-align: right;">1.06</td> </tr> <tr> <td>GST:</td> <td style="text-align: right;">327.16</td> </tr> <tr> <td>Retainage (0.00%):</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Total Finance Charges:</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Less Discounts:</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Payments Received:</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>Current Due:</td> <td style="text-align: right;">\$29.41</td> </tr> </table>	\$2,529.19	\$-298.81	PST:	1.06	GST:	327.16	Retainage (0.00%):	0.00	Total Finance Charges:	0.00	Less Discounts:	0.00	Payments Received:	0.00	Current Due:	\$29.41
\$2,529.19	\$-298.81																
PST:	1.06																
GST:	327.16																
Retainage (0.00%):	0.00																
Total Finance Charges:	0.00																
Less Discounts:	0.00																
Payments Received:	0.00																
Current Due:	\$29.41																

Customers

The Certificate Type field has been removed from the Additional Information tab due to the tab called Tax Certification and its functions.

Providers

The ability to search by Worker Number has been added to the Browse screen.



The following columns on the Browse Service Providers screen can now be sorted.

- Worker Number
- Provider
- PC
- Work Order #
- Service
- Service #
- Pay Status
- Special Period
- Order Date
- Delivered
- Installed
- Date Paid
- HR Date Paid
- HR Check #
- Pay Type

Reports

Provider's Earnings History Report

A column for ERRM has been added to the CSV. This column is for a system that has transitioned from Non-ERRM to ERRM.

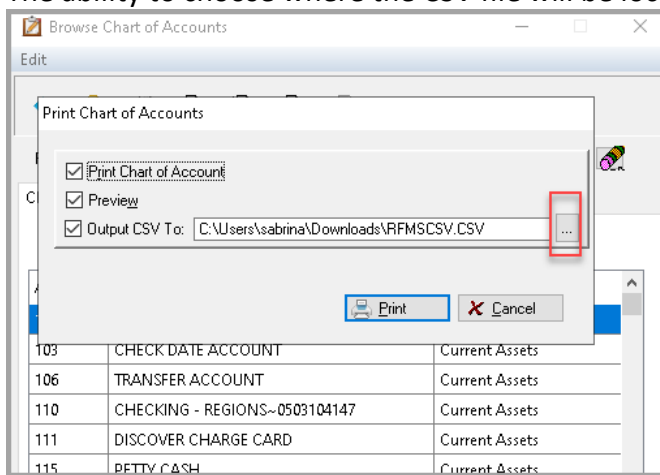
	L	M	N	AG	AH	AI
1	RegHours	OTHours	DbtHours	Pringe	Pay Status	ERRM
2	120	0	0	0	OK to Pay	0
3	8	0	0	0	OK to Pay	0
4	15	0	0	0	OK to Pay	0
5	0	0	0	7.25	OK to Pay	0
6	0	0	0	0	OK to Pay	0
7	0	0	0	0	OK to Pay	0

Utilities

Chart of Accounts

Utilities>SetUp>Chart of Accounts

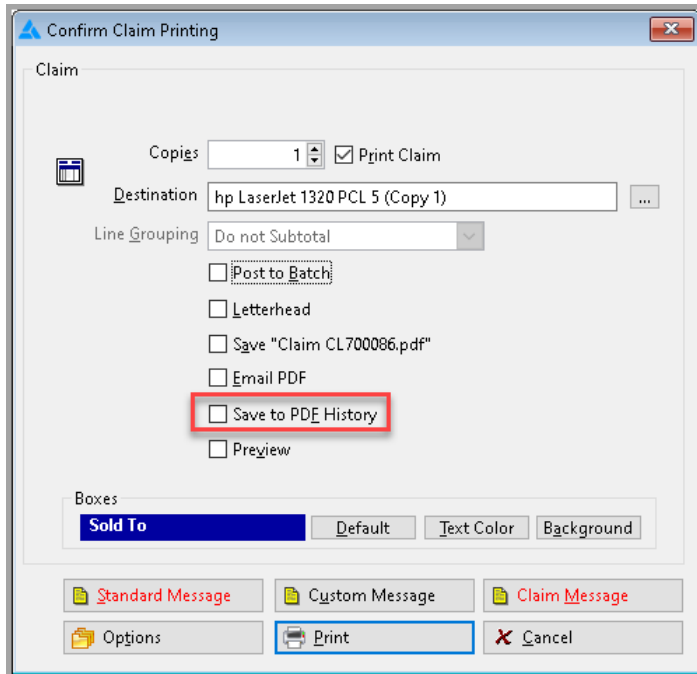
The ability to choose where the CSV file will be located has been added.



Remark Type

Utilities>SetUp>Remark Type

The ability to create Remark Types has been added to the Setup area in Order Entry.



If the Post to Batch checkbox is checked, then some of the options on the print screen will be grayed out.

Products

Find Screen

Use Supplier SKU is now the default setting for the Rolls and Items Find screen.

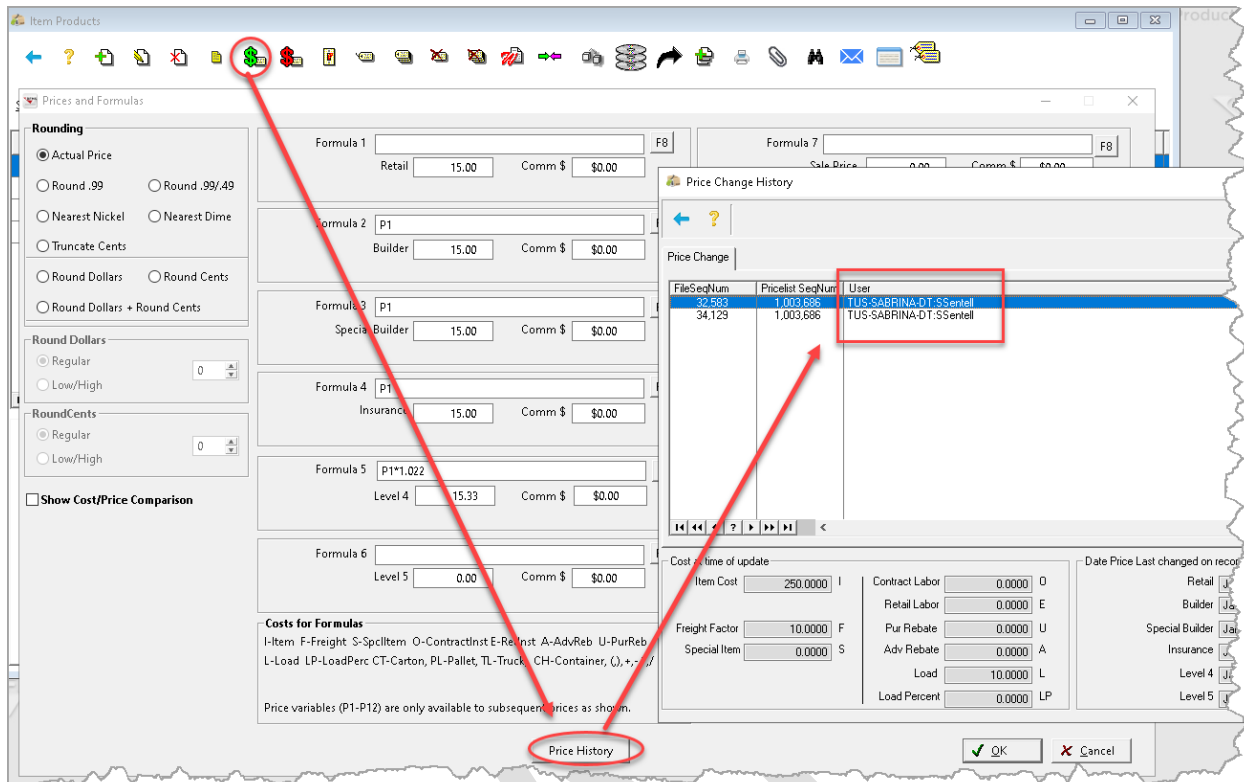
The screenshot shows the 'Product Custom Filter' dialog box with the 'Additional Parameters' tab selected. A red box highlights the 'SKU' field, which contains two radio buttons: 'Use Supplier SKU' (selected) and 'Use Manf SKU'. Other fields include 'Private Supplier', 'Private Item', 'Private Item #', 'Priv Collection', 'Priv Color/Desc', 'Priv Color/Desc #', 'Manufacturer', 'Supplier', 'Item Name', 'Item #', 'Collection', 'Color/Desc', 'Color/Desc #', 'UD Product', 'FOB Point', 'Warranty', 'Fiber', 'Toxicity #', 'EC Account #', 'Products in set', 'Input Date From', 'Trans Date From', and checkboxes for 'Active', 'Inactive', 'Manual', 'E-Commerce', 'Imported', 'Import w/XRef', and 'RFMS Created'. A 'Clear' button is at the bottom left, and 'OK' and 'Cancel' buttons are at the bottom right.

When using the SKU field for the find, it will now search for records that contain what is typed in the field. This field previously searched by “begins with.”

Rolls and Items

Price History

The name of the user who changed the price has been added to the Price Change History Browse screen.



Rolls

Cut Increment has been added to the Roll Product Extended Information 2 screen.

Changing a Roll Product

Product Information 1 | Extended Information 2

Additional Product Spec

UD SER #

Private Collection

Inventory User #

Shipping Weight oz /SY

Ship Qty Variance (+/-)

Berber

NHMS Product

Estimating Information

Measure Product

Estimating Unit

Cut Gap In Inches

Cut Square Cut Gap Type

Seam Width Ft

Pattern Width In Inches

Pattern Length In Inches

Pattern Drop

Max T-Seams

Waste Factor Waste Type

Last price formulas applied date:

Last cut cost used for pricing: 0.0000

Last roll cost used for pricing: 0.0000

XW= 1

Items

Min Plank Length and Waste Rotation fields have been added to the Item Product Extended Information 2 Tab.

Changing an Item Product

Product Information 1 | Extended Information 2

Additional Product Spec

Private Collection

Price /Cost Code

Construction

Country F8

Fiber F8

Species F8

Inventory User #

Shipping Weight oz F8

Thickness mm F8

Ship Qty Variance (+/-)

Primary Component
Composition
Type

NHMS Product

Estimating Information

Measure Product

Estimating Unit

Actual Length In 10 feet 0 Inches

Actual Width In 10 feet 0 Inches

Pattern Width In 0 Inches

Pattern Length In 0 Inches

Pattern Drop

Waste Factor Waste Factor Type

Min Plank Length In

Waste Rotation

Last price formulas applied date: 08/27/19
Last item cost used for pricing: 200.0000

XW= 1

General Range Edit

Min Plank Length and Waste Rotation have been added to the Text Fields selections.

General Range Edit

Edit

Cost

Adv Rebate Retail Inst.

Contract Inst. Special Roll

Freight Special Cut

Freight as Percent of cost Special Item

Load

Load as Percent of cost

Load Percent

Pad Cost

Pur Rebate

Text Fields

Supplier Private Supplier Manufacturer Sample

Supplier Style Private Style Product Code Cut Gap

Style/Item Number Private Style # UD Product Max T-Seams

Supp Color/Desc Priv Color/Desc Fiber Type Waste Factor

Supp Color/Desc # Priv Color/Desc # Unit of Measure Inventory User #

Collection Priv Collection Construction Cut Gap Type

UD SER # Private UD SER # Price Code Copy Supplier to Private

Toxicity # FOB Cut Increment Min Plank Length

Waste Rotation

Toggles

Active Status

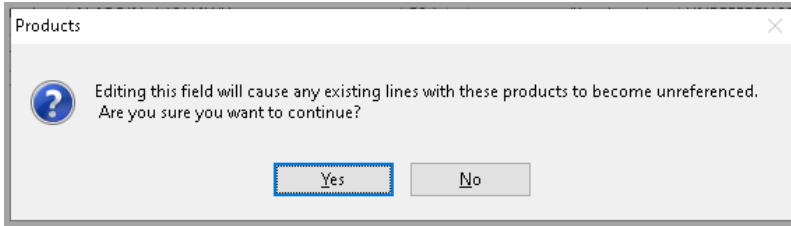
Measure Product

Remove Samples

Cut Square

Fields that are BLANK are IGNORED

A warning message will now appear when changes in the General Range Edit screen will cause lines to become unreferenced.



Inventory

Purchase Orders

Internal Line Notes can now be viewed under View All Notes in Purchase Orders.

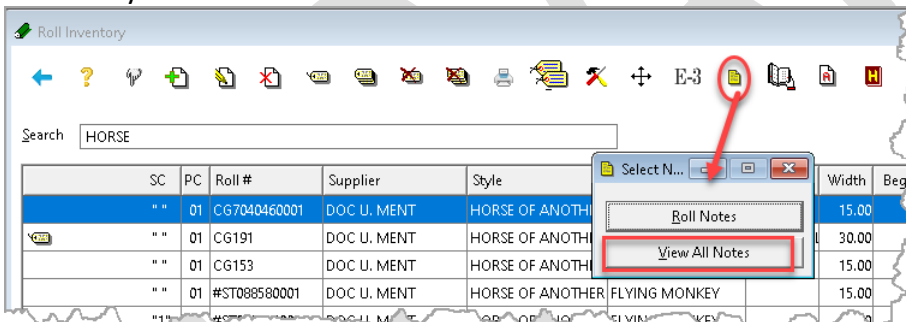
Receiving/Costing

Alt-D has been added as a hotkey for done in Receive BOL. Alt-P has been added as a hotkey for done in Receive from Invoice and Cost from Invoice

Roll and Item Inventory

Notes

The ability to View All Notes has been added.



Inventory Move

A message will now appear showing the total amount to move and reminding the user that this is Reserved plus Amount Available. If this is what should be moved, then Yes is clicked. If not, No is clicked.

Beg Length	Used	Rsvd	Sft Rsv	Avail	PO #	SK
0.00	500.00	15.00	0.00	-515.00	CG7041020006	
5.00	0.00	0.00	0.00	5.00	#ST089410001	
50.00	50.00	0.00	0.00	0.00	CG5021090001	736
500.00	45.00	45.00	0.00	410.00	#ST086740001	736
0.00	-10.00	10.00	0.00	0.00	#ST086740001	
7	Inventory Move				25870001	736
50					35940001	736
1					35940001	
2						736
50					35940001	736
1					100070002	736
2					100160004	736
50.00	50.00	0.00	0.00	0.00	CG4009600001	ST1

Total Amount to be moved: 455
 Amount Reserved + Amount Available
 Do you wish to continue?

Human Resources

Worker Information

The wording of the Job Category field has been changed to Worker Classification/Job Category.

Changing a Personnel Record

General Information | Dates and Leave Time | Personal Deductions | Perpetual | Licenses

Active Provider Union Annualized Federal Tag
 Scheduler Cleaning Apprentice Post Provider through HR

Worker ID: (Leave at zero for automatic number) Marital:

First Name: Pay Type:

Last Name:

Business Name: SS Number:

Address #1: Hour Rate:

Address #2: Pay Cycle:

City: Federal Dependents: Comp. Code:

State: Zip: Department:

Telephone: Mobile: Ethnicity:

Sex: **Worker Classification/Job Category:**

Driver's License: Pay Status:

Do not accrue

Email:

Email Stub

W4 Year: Prior 2020 2020

2020 W4:

 Step 2c - Multiple Jobs Step 4a - Other Income: ** These boxes only apply to the 2020 W4 form.

 Step 3 - Claim Dependents: Step 4b - Deductions:

Reports

Re-print Pay Stub

Reports > Re-Print Pay Stub

The stub when reprinted will now show the Pay Cycle and the Check Date instead of showing the Period Beginning and Period Ending Dates.

Page No. 1
01/06/20
10:35AM

DOCUMENTATION-MENUS & REPORTS

PAYEE: 476 MENT, DOC U.
Pay Cycle: Biweekly

GENERAL DEPARTMENT
Check Date: 01/31/19

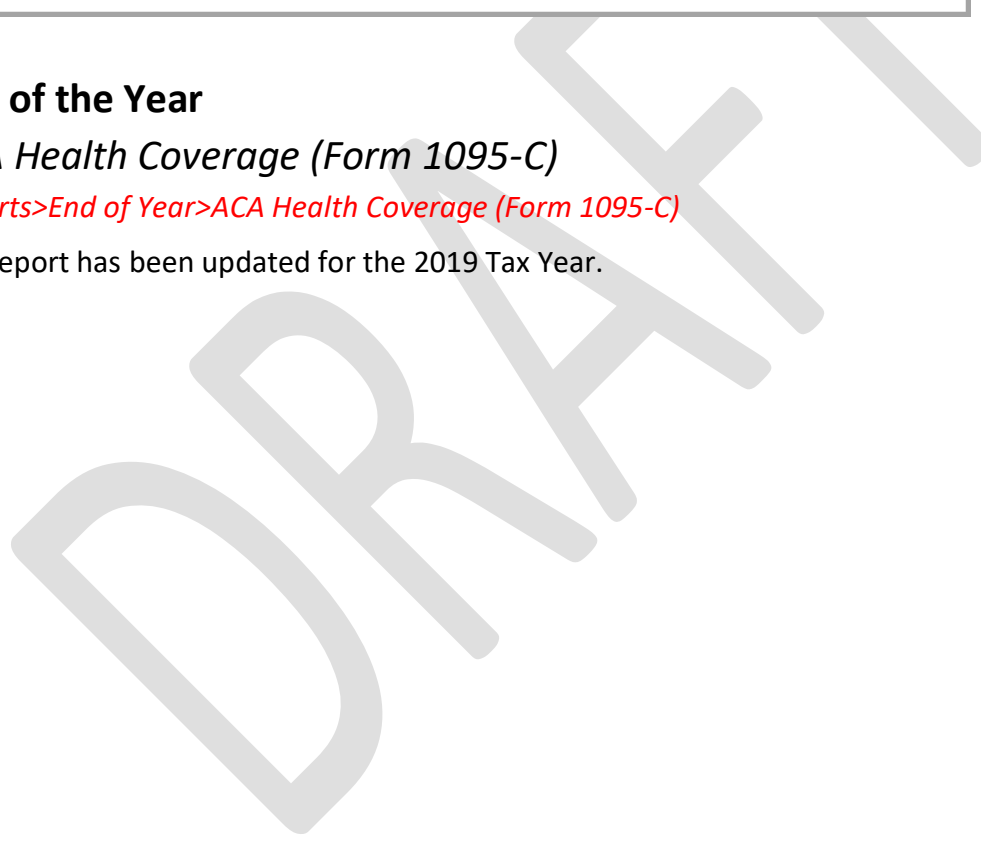
Earnings		Deductions			
GROSS	1,000.00	Federal W	56.23	:	0.00
:	0.00	State W	77.20	:	0.00
:	0.00	:	0.00	:	0.00
:	0.00	FICA	62.00	:	0.00
:	0.00	Medicar	14.50	:	0.00
:	0.00	:	0.00	:	0.00
:	0.00	sute	0.85	:	0.00
:	0.00	:	0.00	:	0.00
:	0.00	:	0.00	:	0.00
Federal Taxa	1,000.00	:	0.00	:	0.00
FICA Taxa	1,000.00	:	0.00	:	0.00
State Taxa	950.00	:	0.00	:	0.00
		Gross Earnin	1,000.00		
		Tot Deducti	-210.78		
		Net Pa	789.22		
		YTD Fed W	56.23		
		YTD State W	77.20		
		:	0.00		
		YTD Mi	77.35		
		YTD Fed Tax	1,000.00		
		YTD FICA Tax	1,000.00		
		YTD State Tax	950.00		
		:	0.00		
		YTD Gro	1,000.00		
		YTD N	789.22		

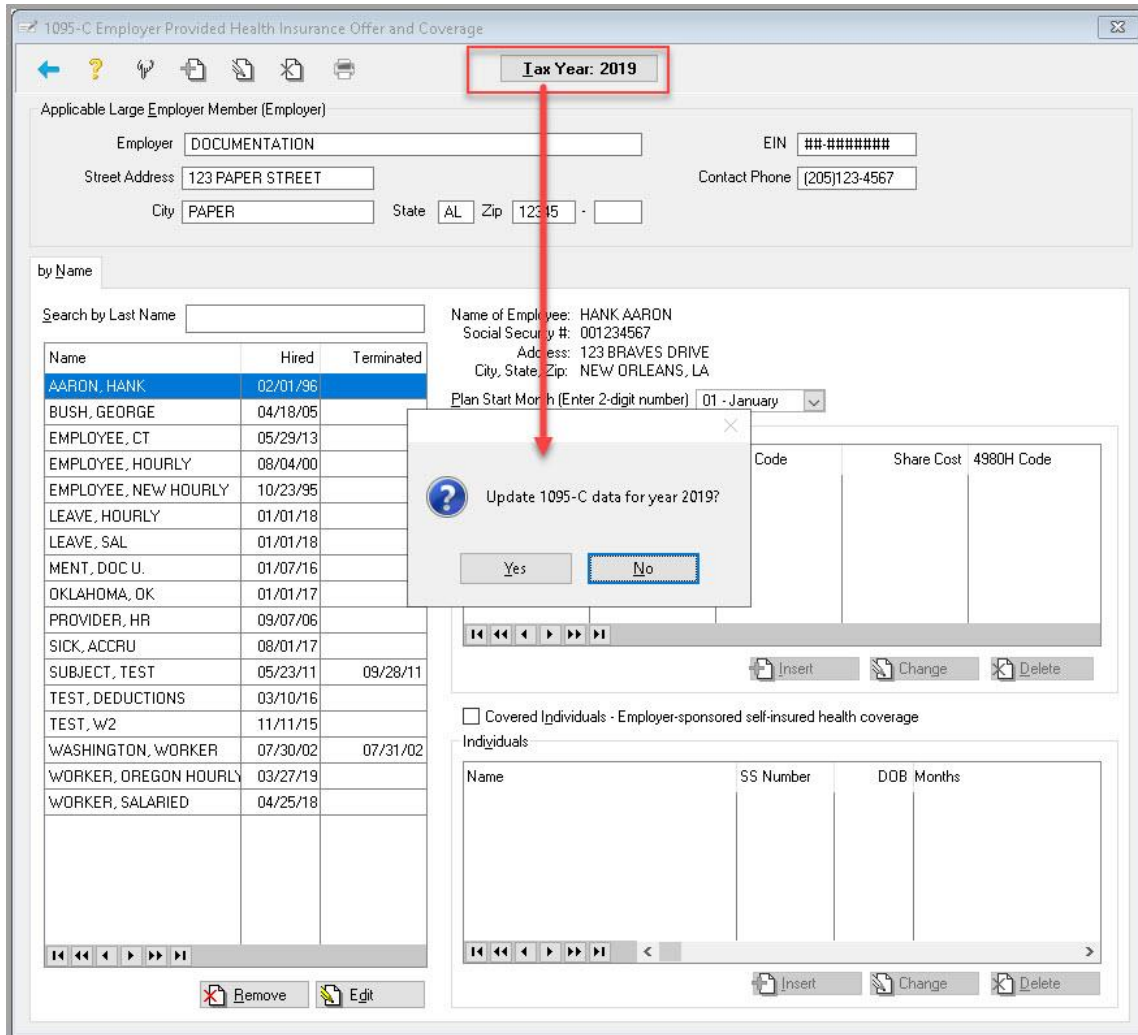
End of the Year

ACA Health Coverage (Form 1095-C)

Reports>End of Year>ACA Health Coverage (Form 1095-C)

The report has been updated for the 2019 Tax Year.






Schedule Pro

Canceled Jobs

An icon now appears on the Browse Orders screen when an order's scheduled job has been canceled.

Store	Order No	Delivered[+]	Customer Name
"1"	CG910018		WOOD, HOLLY
"1"	CG910057		WOOD, HOLLY
" "	CG9 0142	\$	WOOD, HOLLY
" "	CG9 0164		WOOD, HOLLY
" "	CG9 0190		WOOD, HOLLY

Quick Schedule/Quick Edit

Job Install Date has been added to the Find screen.

Find Scheduled Jobs

Stores

Date Information

Job Scheduled Start Date From 12/09/19 F8 To 12/31/79 F8

Job Line Install Date From 01/01/80 F8 To 12/31/79 F8

Scheduled Job Information

Installation Depot F8

Crew F8

Alerts

The [Copy Function](#) has been added to the Alert Browse screen.

BidPro

Export to Order Entry

If the system option [Allow Unreferenced Lines](#) is set to NO, then a warning message will appear, letting the user know the estimate cannot be exported until this has been corrected.

Export Estimate to Order Entry

Export to Order

Estimate #: JE100419 Estimate Date: 01/03/20

Order Details

Order Number CG Inv** F8

Order Date 01/03/20 F8 Est Del Date 01/31/20 F8

Customer Type DOCUMENTATION F8 PO Number

Customer TESTING, REGRESSION 4302 HAYDEN STREET ATHENS, AL 35611

Project TESTING, REGRESSION 4302 HAYDEN STREET ATHENS, AL 35611

Overage Salesperson(s) DOC TEST

Error

Order Entry system option "All Unreferenced Lines" is set to no. There is one or more lines that do not have a referenced product record. This needs to be correct before exporting

OK

Export Options

Export Custom Note to Order Combine and Append Similar Lines for Order (**Line Notes will be lost when this option is enabled)

Export Custom Note to Work Order Do Not Export Prices & Totals (Prices and Totals will be set to 0)

Export Internal Note to Order

Export Line Notes to Work Order Lines

Export Line Notes to Order Lines Update Contract Pricing on Estimate before Exporting

Edit Order After Exporting

Export Close

CMM

System Options

Allow User to Edit and Delete Remarks

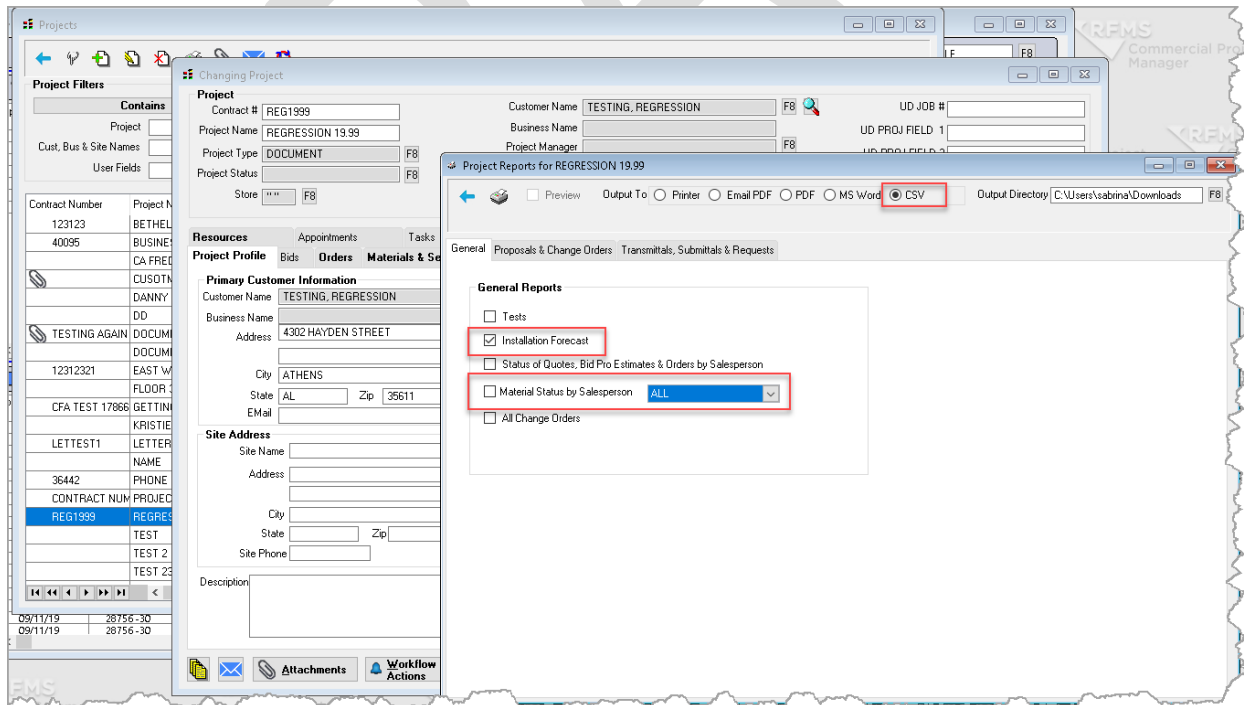
The title of this system option was changed from *Allow Users Without Administrative Rights to Edit and Delete*. The options have been changed from Yes and No to the following:

- If Admin Only is selected, then only the users who have CMM & Communication Center Administrative Rights checkbox selected on the user screen will be able to edit or delete remarks.
- If All Users is selected, then all users in the system will be able to edit and delete remarks.
- If No is selected, then no one will be able to edit or delete remarks.

Projects

Reports

The ability to send Installation Forecast and Material Status by Salesperson to CSV has been added.



Reports

The ability to send the reports to CSV has been added.

