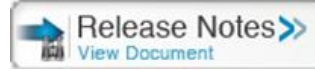


A large decorative graphic on the right side of the page consists of three overlapping, wavy layers. The top layer is light grey, the middle layer is dark red, and the bottom layer is black. The layers curve upwards from left to right.

Version 20.0 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 alterations, see the release notes on the download web page. Click the release notes button to find these.






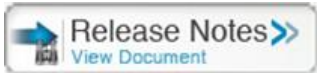
To see what you may have missed in previous updates, click [here](#).

[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 something is on the screen, you either do not 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 data-bbox="592 1644 1328 1745" 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 included in 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 start 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.






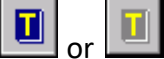


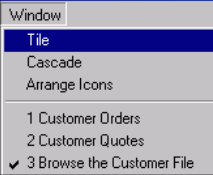



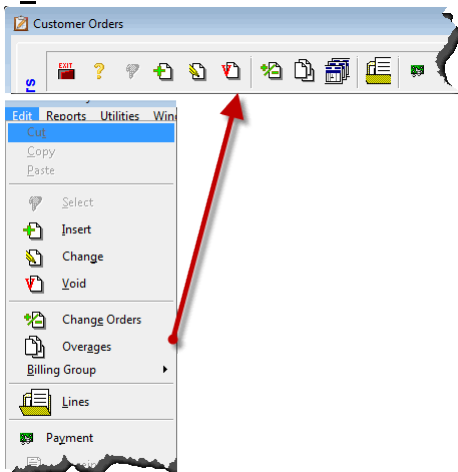
	Tag Untag Tagall or Un-tagall record(s). Selects records
	View details of a record.
	Send an email or RFMS mail message regarding the highlighted record.
	View the history of a record.
	View the pdf history of reports for the highlighted record.
	Click to view the tracking record created for every record 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> 

Table of Contents

- ORDER ENTRY 7**
 - Billing Groups..... 7
 - Providers..... 7
 - Word Merge 8
 - Batch Processing..... 8
 - Customers..... 9
 - Reports..... 9

- PRODUCTS 10**
 - General Range Edit 10
 - Product Import/Export (PIE)..... 10

- INVENTORY 11**
 - Purchase Orders 11
 - Auto PO..... 15
 - Special Receiving 16
 - Rolls and Items 17
 - Warehouse Module..... 18

- BIDPRO 20**
 - Word Merge 20

- HUMAN RESOURCES 20**
 - Worker Information..... 20
 - 941 20

- SALES REPORTS 21**
 - Material Analysis 21

- CMM..... 21**
 - Workflow Actions 21
 - Prospects and Customers 22
 - Utilities..... 22

- E-COMMERCE 23**
 - Price Inquiry..... 23

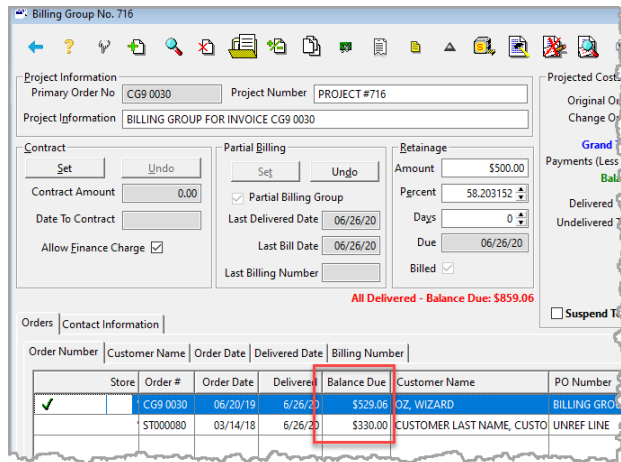
- NHMS 23**

Project Overview 23
Flooring Selector 24
Price Requests 24
Takeoffs 26
NHMS Import..... 26
20/20 CABINET DESIGN INTEGRATION 26

Order Entry

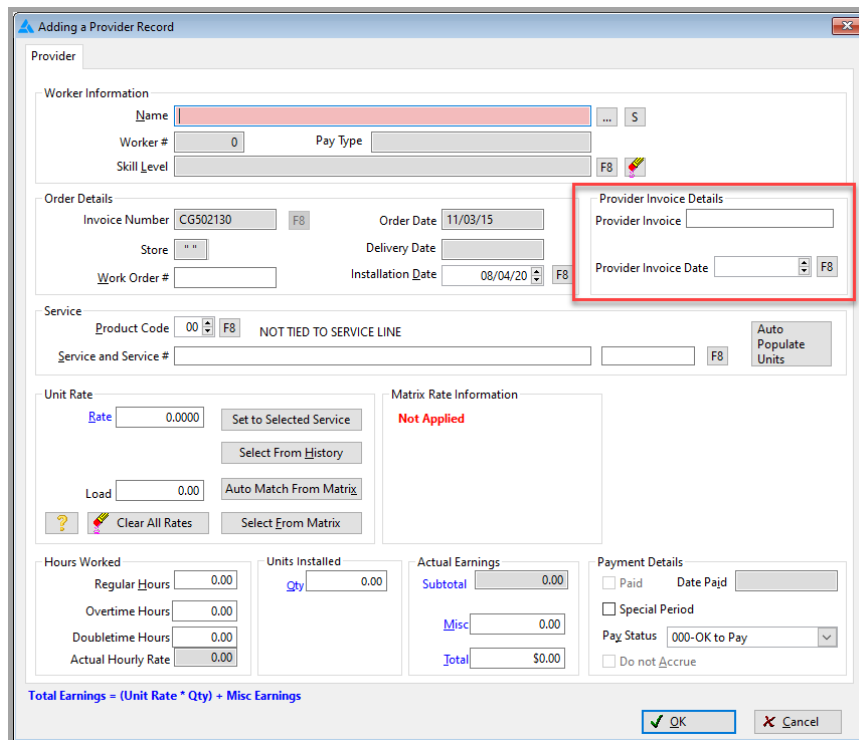
Billing Groups

Balance Due column has been added to the Orders browse screen in Billing Groups.



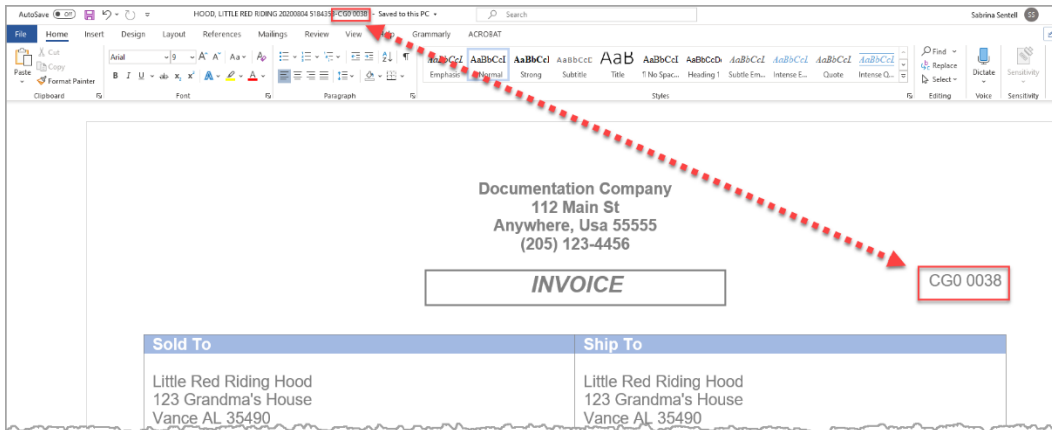
Providers

The Provider Invoice and Provider Invoice Date have been added to the Provider Record screen to satisfy specific audit requirements. This information will now be available on the provider record as a reference.



Word Merge

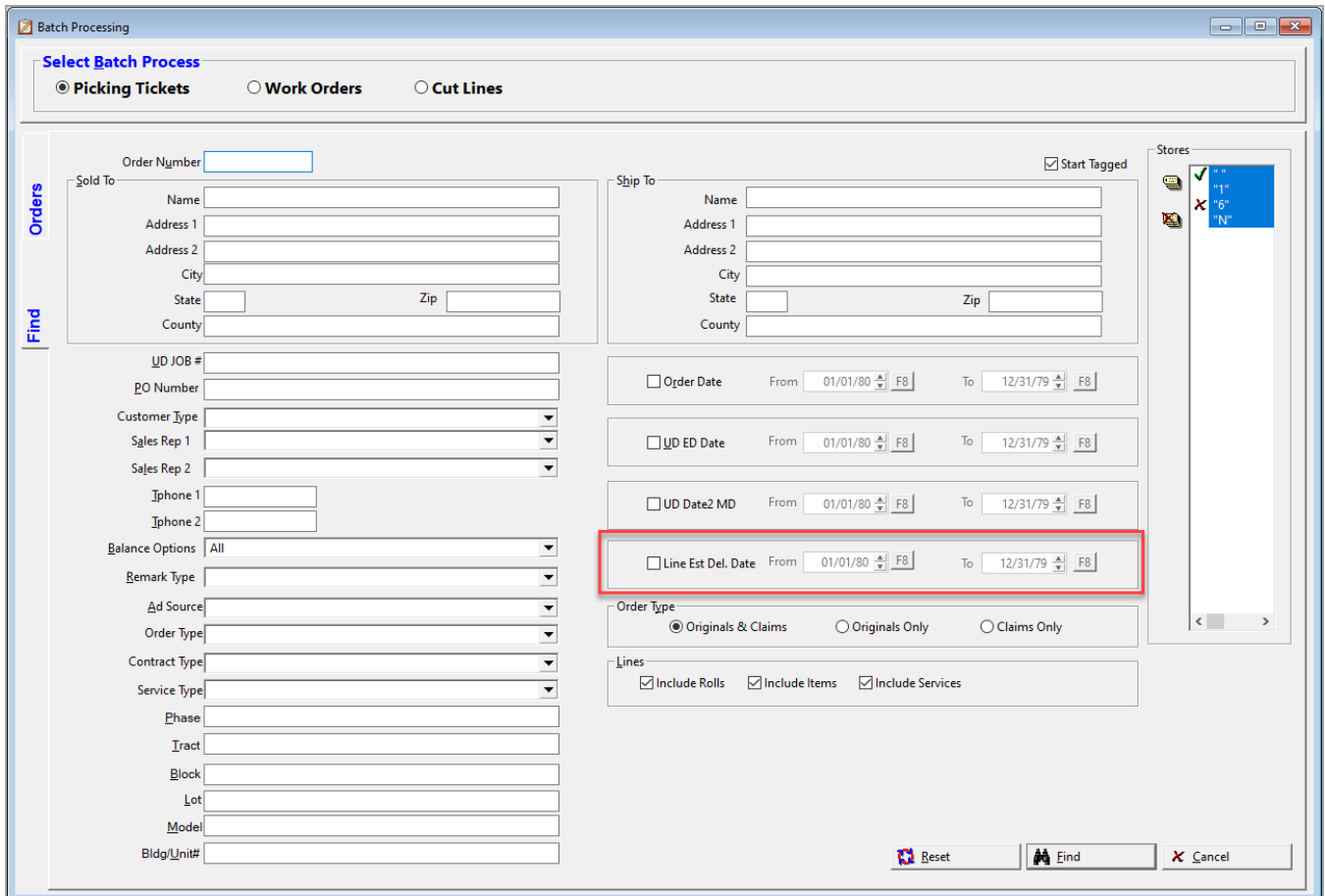
The CG# has been added to the Word Merge file name for Orders and Quotes.



Batch Processing

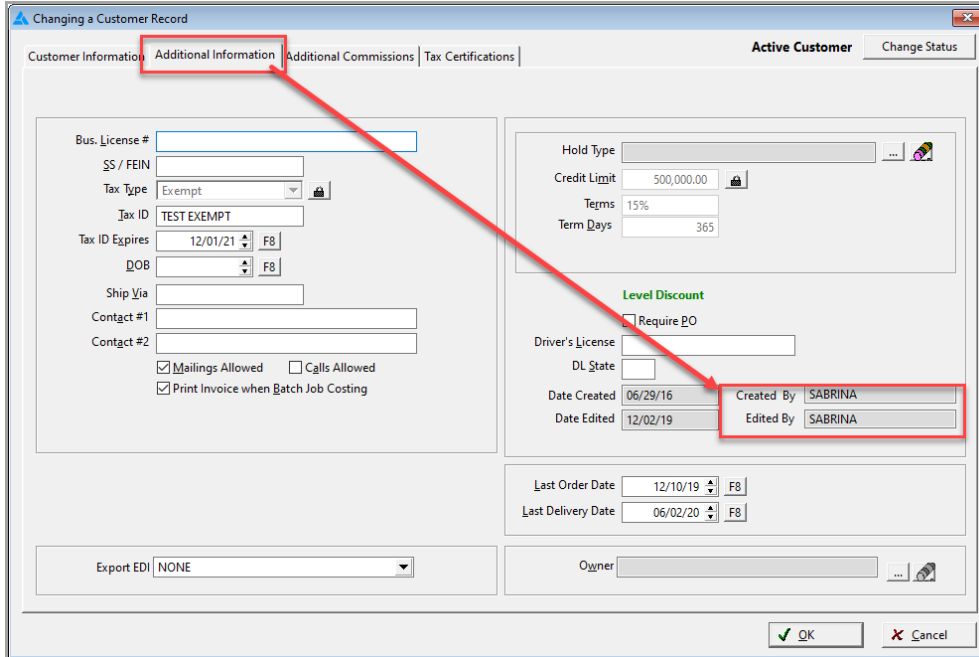
File > Batch Processing

The ability to filter by Line Estimated Delivery Date has been added to the Find screen.



Customers

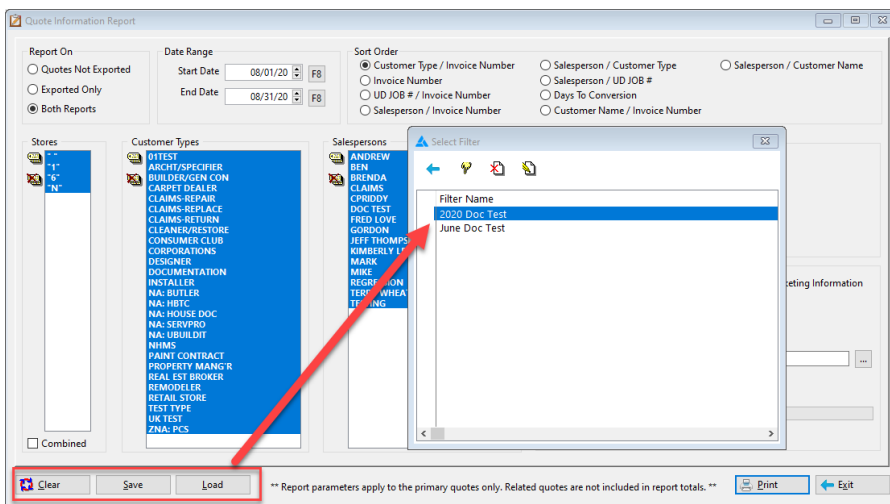
The fields Created By and Edited by have been added to the Additional Information tab in the Customer record.



Reports

Quote Information Report

The Save and Load feature has been added to the Quote Information Report parameters screen.

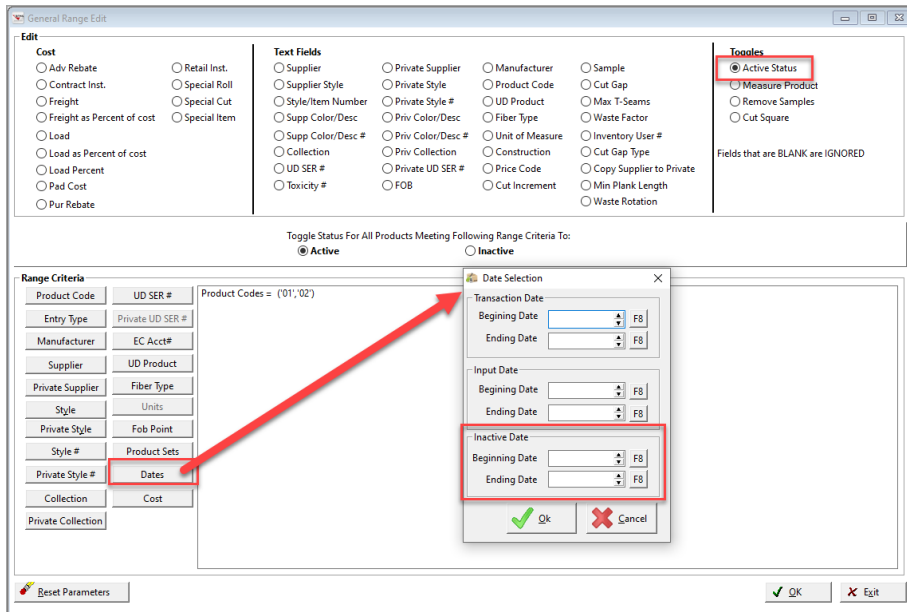


Products

General Range Edit

Active Status

The Inactive Date has been added to the Date Selection screen when toggling the Active Status.



Product Import/Export (PIE)

When importing and the Supplier Color/Supplier Description column (column L) has been changed, if the product matches, then those changes will be updated in products.

Inventory

Purchase Orders

Buy Quantity

On the Purchase Order browse screen, when the Qty-Ord does not match the Buy Quantity in Products, the field will be orange.

PO # - Line #	Ordered	SC	Supplier	Status	Private Style / Name	Private Color / Description	Promise Date	Length	Qty-Ord	Qty-Rcvd	Unit Cost
#ST0899-0001	08/28/19	** 01	DOC U. MENT	Satisfied	BLACK AS NIGHT	GASTON	08/28/19	15.00	25.00	25.00	\$7.2500
#ST0899-0001	08/28/19	** 13	DOC U. MENT	Satisfied	PATH TO OZ	YELLOW BRICK ROAD	08/28/19	0.00	15.00	15.00	\$15.0000
#ST0899-0001	08/26/19	** 01	DOC U. MENT	To Be Ordered	ISLAND FUN	BELLYFISH GRAY		15.00	25.00	0.00	\$150.0000
#ST0899-0001	08/26/19	** 01	DOC U. MENT	To Be Ordered	LAVA TEST	RED HOT		15.00	20.00	0.00	\$0.0000
#ST0899-0001	08/26/19	** 03	DOC U. MENT	Satisfied	SEARCH FOR TEST	GUNSTOCK RED OAK WIDE P	09/26/19	4.00	100.00	100.00	\$5.0000
#ST0900-0001	08/27/19	** 01	DOC U. MENT	Satisfied	HORSE OF ANOTHER COLOR	WIZARD OF OZ	08/27/19	1,000.00	3,333.33	3,333.33	\$15.0000
#ST0900-0001	10/04/19	** 01	DOC U. MENT	Satisfied	HORSE OF ANOTHER COLOR	COURAGE	10/04/19	500.00	1,666.67	1,666.67	\$15.0000
#ST0900-0001	10/04/19	** 01	DOC U. MENT	To Be Ordered	LAVA TEST	RED HOT		10.00	13.33	0.00	\$0.0000
#ST0901-0001	12/10/19	** 01	DOC U. MENT	To Be Ordered	HORSE OF ANOTHER COLOR	KANSAS		15.00	15.00	0.00	\$15.0000
#ST0901-0001	12/10/19	** 06	DOC U. MENT	Satisfied	TELL ME A STORY	GINGERBREAD MAN	12/13/19	0.00	15.00	15.00	\$250.0000
#ST0901-0001	12/10/19	** 06	DOC U. MENT	Satisfied	TELL ME A STORY	FAIRY BLUE	12/10/19	0.00	150.00	150.00	\$25.0000
#ST0901-0001	12/10/19	** 06	DOC U. MENT	Satisfied	TELL ME A STORY	RED RIDING HOOD	12/10/19	0.00	500.00	500.00	\$150.0000
#ST0902-0001	01/07/20	** 01	DOC U. MENT	Satisfied	CHAMPIONS	ROLL TIDE RED	01/07/20	500.00	666.67	666.67	\$100.0000
#ST0902-0012	01/07/20	** 01	DOC U. MENT	To Be Ordered	LAVA TEST	BLACK STONE		15.00	20.00	0.00	\$9.0000
#ST0902-0014	01/07/20	** 06	DOC U. MENT	To Be Ordered	THE PATRIOT	MUSKET METAL		1.00	15.00	0.00	\$250.0000
#ST0902-0016	01/07/20	** 01	DOC U. MENT	To Be Ordered	HORSE OF ANOTHER COLOR	FLYING MONKEY		10.00	16.67	0.00	\$100.0000
#ST0902-0017	01/07/20	** 01	DOC U. MENT	To Be Ordered	VOLCANO LAVA	BUBBLY BLUE		10.00	55.56	0.00	\$100.0000
#ST0902-0018	01/07/20	** 01	DOC U. MENT	To Be Ordered	VOLCANO LAVA	HAWAII HEAT		10.00	55.56	0.00	\$100.0000
#ST0902-0019	01/07/20	** 01	DOC U. MENT	To Be Ordered	LAVA TEST	RED HOT		15.00	20.00	0.00	\$100.0000
#ST0902-0021	01/07/20	** 06	DOC U. MENT	To Be Ordered	BLOGGINS	PATRIOT PRIDE		0.00	50.00	0.00	\$150.0000
#ST0902-0022	01/07/20	** 06	DOC U. MENT	To Be Ordered	THE PATRIOT	REDCOATS		1.00	10.00	0.00	\$75.0000
#ST0902-0034	01/07/20	** 01	DOC U. MENT	To Be Ordered	PATH TO OZ	YELLOW BRICK ROAD		0.00	15.00	0.00	\$15.0000
#ST0902-0037	01/07/20	** 10	DOC U. MENT	To Be Ordered	MUNCHKIN LAND	BUBBLE TROUBLE		30.00	3.00	0.00	\$0.0000
#ST0902-0055	01/07/20	** 06	DOC U. MENT	To Be Ordered	BLOGGINS TEST	AMERICAN PATRIOT		0.00	5.00	0.00	\$0.0000
#ST0902-0056	01/07/20	** 06	DOC U. MENT	To Be Ordered	TELL ME A STORY	GLASS SLIPPER		0.00	15.00	0.00	\$200.0000

Color Key

Violet and Orange have been added to the Color Key. Violet is a Special PO Cost, and Orange is Mismatch Buy Quantity.

PO # - Line #	Private Color / Description	Promise Date	Length	Qty-Ord	Qty-Rcvd	Unit Cost	Total Cost
#ST08770-0008	PRIVATE DESCRIPTION		50.59	1.00	0.00	\$0.5000	\$0.50
#ST08770-0009			0.00	40.00	0.00	\$0.2900	\$11.60
#ST08770-0029	CONVICTION		15.00	20.00	0.00	\$16.1600	\$323.20
#ST08770-0030	INTENSITY		15.00	20.00	0.00	\$16.1600	\$323.20
#ST08770-0078	BISCUIT UNGLAZED		0.25	10.00	0.00	\$3.5900	\$35.90
#ST08770-0114	BLUE STEEL		83.33	111.11	0.00	\$0.6800	\$75.55
#ST08770-0115	6# REBOND-7/16"		45.00	1,000.00	0.00	\$0.1478	\$147.80
#ST08770-0133	TEST		15.00	20.00	0.00	\$6.9300	\$138.60
#ST0903-0001	POISON APPLE		15.00	20.00	0.00	\$7.2500	\$145.00

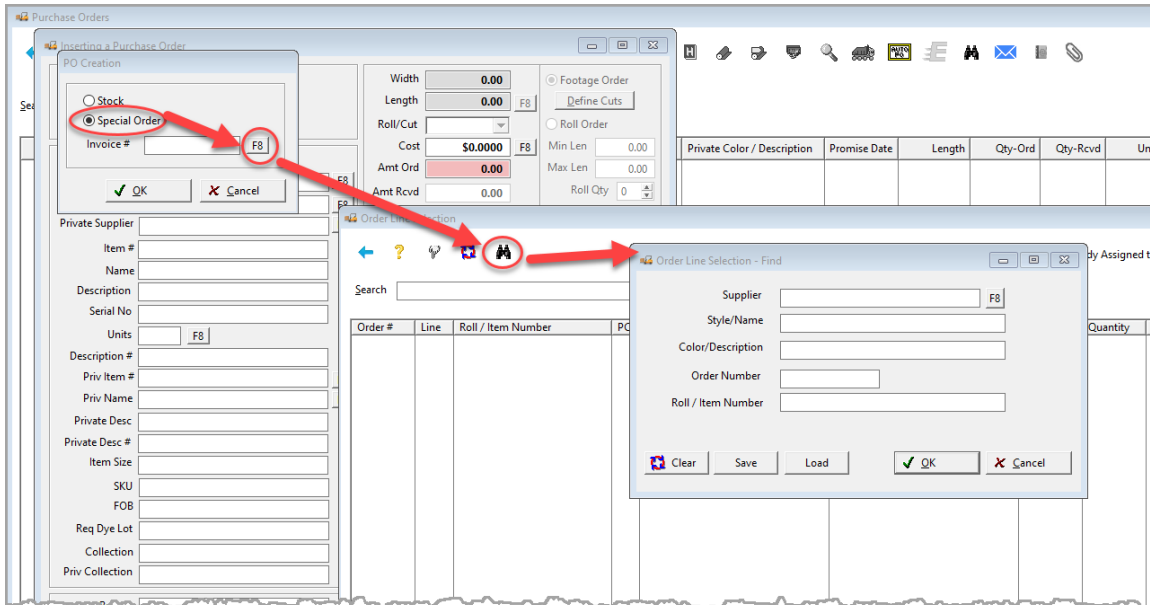
Supplier: 205-999-0000
Account #: SUPPLIER ACCOUNT
E-Mail: klee@rims.com

Ordered By: SAB
Taken By:
Promise Date: UD ED Date:
Sidemark: CUSTOMER TEST/ Stoc
Comments:
Reference #:

Color key:
Red - Contact CSR
Yellow - EC PO send but not verified
Aqua - EC vendor update received
Violet - Special PO Cost
Orange - Mismatch Buy Quantity

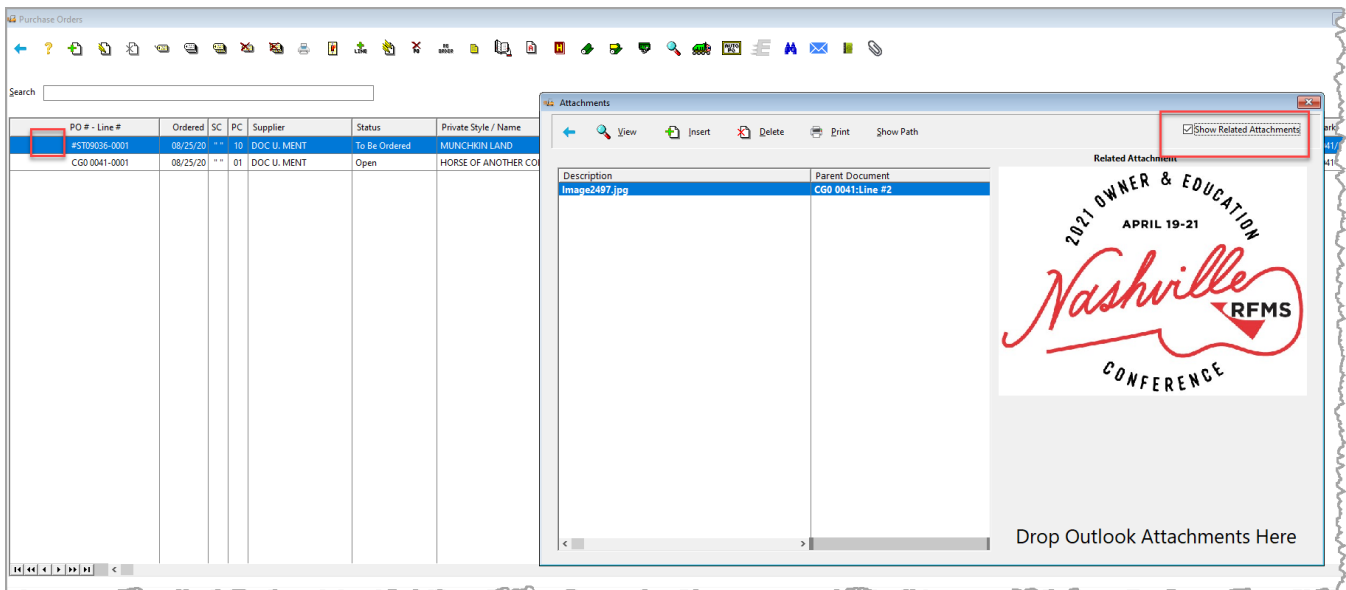
Special Order Purchase Orders

A Find screen with [Load and Save](#) has been added to the Order Line Selection screen.



Attachments

If there is an attachment on the Order Line, the Attachment icon will not display on the Purchase Order browse screen, but the attachment may be viewed by clicking the See Related Attachments checkbox.



Transfer Line Notes to PO Line

Starting in Version 20, the Internal Note, instead of the custom note, will come over from the line.

PURCHASE ORDER 08/24/20
02:54PM

ACCOUNT NUMBER N/A

From DOCUMENTATION COMPANY 112 MAIN ST ANYWHERE, USA 55555 Tel: (205) 123-4458	Builder Builder Information Not Available
Ship To DOCUMENTATION COMPANY 112 MAIN ST ANYWHERE, USA 55555 Tel: (205) 123-4458	Supplier 15

#ST09033

Order Date	Product Code	Item Number	Style / Item Color / Description	Roll/Cut	Amount Ordered	Units	Quoted Promise Unit Price Date
08/24/20	01	#ST090330001	BLACK AS NIGHT	Cut	8.33	SY	\$30.0000
		PO #: #ST09033-0001	MAGIC MIRROR	Width: 15.00 Length: 5.00			

Store: "" Style #: EVIL Color#:
 Taken By:
 SideMark: CG0 0040/ Stock Comments
 Ref #
 Dye Lot: SKU #:
 UD SER # Manf SKU #:
 Order By: BOENTELL Private Color/Desc: (MAGIC MIRROR)

Notes: This is an internal note - 41759 08/24/20 - 14:49:29 : Ssentell

Line Total \$249.90
Order Total \$249.90

The "Transfer Line Notes to PO Lines" box must be checked.

Customer Order

Original Order

Order # ST000035 F8 Store F8 Order Date 01/24/18 F8 Iphone 1 1234567890 Iphone 2

Purchase Order Generation **2**

PO Gen Info PO Gen Info **2**

Use as Sidemark:
 Sold to Name Invoice #
 Ship to Name Telephone #1
 Ship to Address Customer PO #
 Job I.D.

Line Notes **3**

Transfer Line Notes to Purchase Order **3**
 Transfer Line Notes to Inventory

Printing

Print Purchase Order
 Type Standard Purchase Order
 Preview Purchase Order
 Printer hp LaserJet 1320 PCL 5 (Copy 1)

Print Private Style Print Roll # Print Req. Dye Lot
 Print Private Color Print Salesrep Print SKU #
 Print Store Codes Print Est Del Date Print Manf SKU #
 Print Notes Print Unit Cost Print Builder Info.
 Print Ref # Print Line Total Print UD SER #
 Print Bar Code Print Order Total Print PO Cuts

Standard Message
 Print Message #1 Print Message #3
 Print Message #2 Print Message #4

Builder Information
 Builder:
 Subdivision:
 Block: Lot:
 Import Builder from Sold-To Name
 Import Subdivision from Ship-To Name

Email Options
 Email PDF
 Use Supplier Email
 PDF File Name ST0000350001

Generate Purchase Order ONLY
 Generate Purchase Order and Send PO Electronically
 Generate Purchase Order AND Receive Goods
 Cancel

1 PO

Main Info Additional Info Hold Info

Auto PO Generation

Type of PO #'s to Use

Special Order # (Customer Invoice #)

Stock PO # ("#ST")

Use as Sidemark

Sold to Name Invoice #

Ship to Name Tele #1

Ship to Address Cust PO #

Job I.D.

Assign to Customer Order Lines

Transfer Line Notes to PO Lines

Transfer Line Notes to Inventory

Transfer Line Areas to PO Cuts

Import Ship-To from Customer Order

****This will not apply to E-Commerce Records**

Use Default Selection Method

Import from Order Line

Import from Store Ship-To

Import from Customer Ship-To

Import Builder Information from Customer Order

Import Builder Info from Sold-To Name

Import Subdivision Info from Ship-To Name

OK Cancel

Printing

The ability to use the Salesperson's email from the Supplier file has been added to the Print screen. The email will also be listed in the CC field of the email.

Printing Purchase Orders

PO Type: Standard Purchase Order Printer: hp LaserJet 1320 PCL 5 (Copy 1)

Preview Purchase Order Report Copies: 1

Print Private Style Print Roll # Print Bar Code Print Line Total Print Req. Dye Lot UD SER # Print Date

Print Private Color Print SKU # Print Notes Print Order Total Print UD ED Date Print Manf SKU # Print Time

Print Store Codes Print Ref # Print Salesrep Print Builder Info. Print Unit Cost Print PO Cuts Print Ordered By

Print Standard Msg #1 Print Standard Msg #2 Print Standard Msg #3 Print Standard Msg #4 Configure

Colors in PO Boxes: From Ship To Supplier Restore Default Text Color Background

Email Options

Email PDF PDF File Name:

Use Supplier Email

Use Sales Rep Email from Supplier

Print Cancel

Ship-To

If the ship-to information is different on some of the products listed on the Purchase Order, then *See Below* will be listed in the Ship-To box, and the correct ship-to address will be print on all the lines.

PURCHASE ORDER 08/24/10 10:57 AM
ACCOUNT NUMBER 9999999999999999

From DOCUMENTATION COMPANY 112 MAIN ST ANYWHERE, USA 55555 Tel: (205) 123-4456	Builder Builder Information Not Available
Ship to See Below	Supplier DOC U. MENT

Order Date	Product Code	Item Number	Style / Item Color / Description	Roll/Cut	Amount Ordered	Units	Quoted Price	Promise Date
08/24/20	03	159	TEST FOR SEARCH	----	100.0000	EA	\$5.0000	
PO #: #ST09031-0005 GUNSTOCK RED OAK WIDE PLANK Store: "" Taken By: SideMark: CG8 0069/ Stock Comments: Ref #: Dye Lot: UD SER #: Item Size: 4X4 Order By: SSENTELL There are 100 EA per BX. This PO is for 1 BX.								
			Manf SKU #:			Line Total		\$500.00
			Private Style/Item(SEARCH FOR TEST)					
			Private Color/Desco(GUNSTOCK RED OAK WIDE PLANK)					
			Builder Info:					
			Ship To: TESTING 42154 FOGBURN LANE LOOKING FOR SEE BELOW TUSCALOOSA, AL 35405 Cont. ME. Tel: 1232567 E-mail: ME@GMAIL.COM					
08/24/20	00	TEST	RED HOT LAVA	----	15.0000	BX	\$250.0000	
PO #: #ST09031-0006 RED HOT LAVA Store: "" Taken By: SideMark: CG9 0203/ Stock Comments: Ref #: Dye Lot: UD SER #: Item Size: 1.08333X1.08333 Order By: SSENTELL There are 20 BX per BX. This PO is for 0.75 BX.								
			Manf SKU #:			Line Total		\$3,750.00
			Private Style/Item(VOLCANO)					
			Private Color/Desco(RED HOT LAVA)					
			Builder Info:					
			Ship To: DOCUMENTATION COMPANY 112 MAIN ST ANYWHERE, USA 55555 Tel: (205) 123-4456					

Auto PO

Customer Type has been added to the Find screen for Auto PO.

The screenshot shows the 'Auto PO Generation - Find' dialog box. It contains a list of items with columns for Supplier, SC, and PC. The 'Customer Type' dropdown menu is highlighted with a red box. A red arrow points from the 'Auto PO' button in the main application window to the 'Auto PO Generation - Find' window.

Special Receiving

Costing Service

File>Special Receiving>Costing Service

Extra Costing Label 1 Field

This field has been added to the Open Service Orders -- Costing/Receiving screen. It follows the system option [Extra Costing Label 1](#).

By setting the Extra Costing Label 1 system option to GST, the field can be used for GST.

The image shows a screenshot of a software application interface. At the top, a window titled "Browse User Values for Specific System Option - Admin Only" is open. It displays the "Extra Costing Label 1" system option. A "Set Initialization Parameters - Inventory" dialog box is overlaid on this window, showing "Extra Costing Labels" with "#1 EXTRA COSTING LABEL" and "Extra Costing Act Codes" with "#1 152 FB".

Below this, the main application window "RFMS Inventory - DOCUMENTATION-MENUS & REPORTS" is visible. The "Special Receiving" menu item is highlighted with a circled "1". The "Costing Service" sub-menu item is highlighted with a circled "2".

The "Open Service Orders -- Costing / Receiving" window is also open. It shows a table of open service orders. The "EXTRA COSTING LABEL" field is highlighted with a red box and a circled "3". The field contains the value "0.0000" and is marked as "Discountable".

PC	Supplier	Status	Private Style / Name	Private Color / Description	Promise Date	Length	Qty-Ord	Qty-Rcvd	Unit Cr
01	DOC U. MENT	Satisfied	BLACK AS NIGHT	GASTON	08/28/19	15.00	25.00	25.00	\$7.25
13	DOC U. MENT	Satisfied	PATH TO OZ	YELLOW BRICK ROAD	08/28/19	0.00	15.00	15.00	\$15.00
01	DOC U. MENT	To Be Ordered	ISLAND FUN	JELLYFISH GRAY		15.00	25.00	0.00	\$150.00
01	DOC U. MENT	To Be Ordered	LAVA TEST	RED HOT		15.00	20.00	0.00	\$0.00

PO # - Line #	Ordered	SC	PC	Supplier	Status	Private Service
CG302569-0004	05/22/14	1*	80	WCO	Open	MOVE FURNITURE
CG502142-0002	12/03/15	-	80	WCO	Open	FLOOR PATCH - LEVELING

Rolls and Items

Received Inventory

Received Inventory with Order Line assignments may now be edited by clicking the Edit button at the bottom of the Change screen. A warning message will appear, and if this is the Roll or Item that needs to be changed, click Yes. The editable fields will be enabled.

The screenshot shows the 'Changing - Item# 123456' window. The 'Edit Item Inventory?' dialog box is open, asking for confirmation to apply changes to all assigned order lines. The dialog text reads: 'Changes to this inventory record will be applied to ALL assigned order lines, including job costed lines. This could lead to material description differences between original product and the revised record in the following fields: Product Code, Supplier, Name, Description, Description Number. Are you sure you want to continue?'. The 'Edit' button at the bottom of the main window is highlighted with a red box and a red arrow.

Notes

When a Roll or Item is edited in Inventory, a system-generated remark with the changes is created. This remark cannot be edited but can be viewed by clicking [Notes>View All Notes](#).

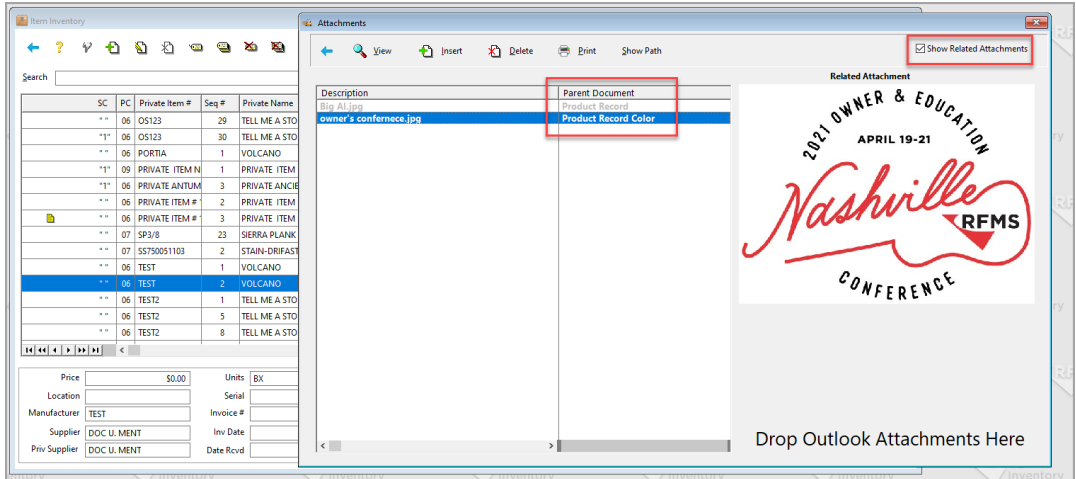
The screenshot shows the 'Item Inventory' window with a search for 'COURAGE'. A table of inventory items is displayed. A pop-up window titled 'All Notes and Remarks for Item: F1GHT' is open, showing a table of notes and remarks.

SC	PC	Private Item #	Seq #	Private Name	Private Description	Run Lot	Price	Qty Rcvd	Used	Reserved	Soft Resv	Available	Lading #	PO #	UD SER #
**	06	F1GHT	1	COURAGE	NICE BROWN TILE WITH		\$50.00	150.0000	0.0000	0.0000	0.0000	150.0000	BL3209590001		

Note/Remark Type	Number	Line	Date Created	Date Edited	
Item Inventory Remark	F1GHT	1	08/26/20	08/26/20	DATA CHANGE: INITIAL PRODUCT SEQ #1013728 COLOR SEQ # 7829633 NEW PRODUCT SEQ #1013729 COLOR SEQ #7829634 ITEM NUMBER CHANGE: INITIAL ITEM # - SEQ #COURAGE - 1 NEW ITEM # - SEQ #F1GHT - 1

Attachments

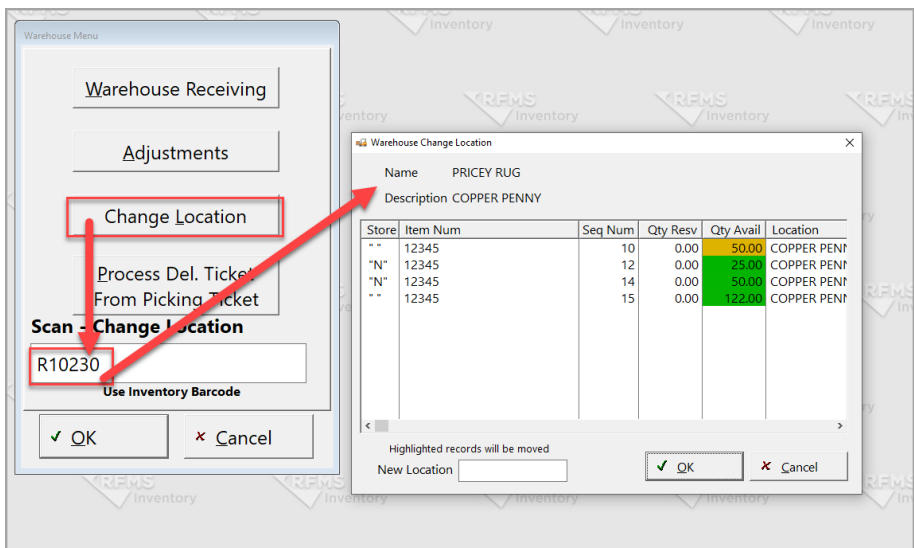
The ability to view the Product attachments has been added. The Show Related Attachments checkbox must be checked.



Warehouse Module

Change Location

Locations can now be changed on multiple records at once by scanning the [RFMS Barcode \(R Code\)](#). Warehouse Change Location window will display a list of items with a specified barcode if the barcode has more than one record.



Select records to be moved to a new location by clicking on each one. Enter a new location (bottom left). Click OK.

Warehouse Change Location

Name PRICEY RUG
Description COPPER PENNY


Seq Num	Qty Resv	Qty Avail	Location	System Ref Num	Tagged
10	0.00		COPPER PENNY	0	0
12	0.00	25.00	COPPER PENNY	0	0
14	0.00		COPPER PENNY	0	0
15	0.00		COPPER PENNY	0	0

Highlighted records will be moved

New Location

Click Yes to complete the Change Location process. Click No to abandon.

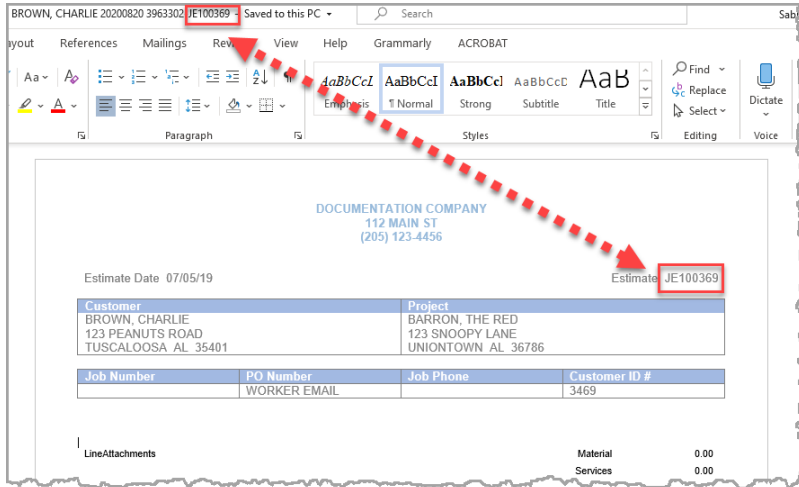
Change Location

 Change all highlighted records?
New Location BIN TESTING

BidPro

Word Merge

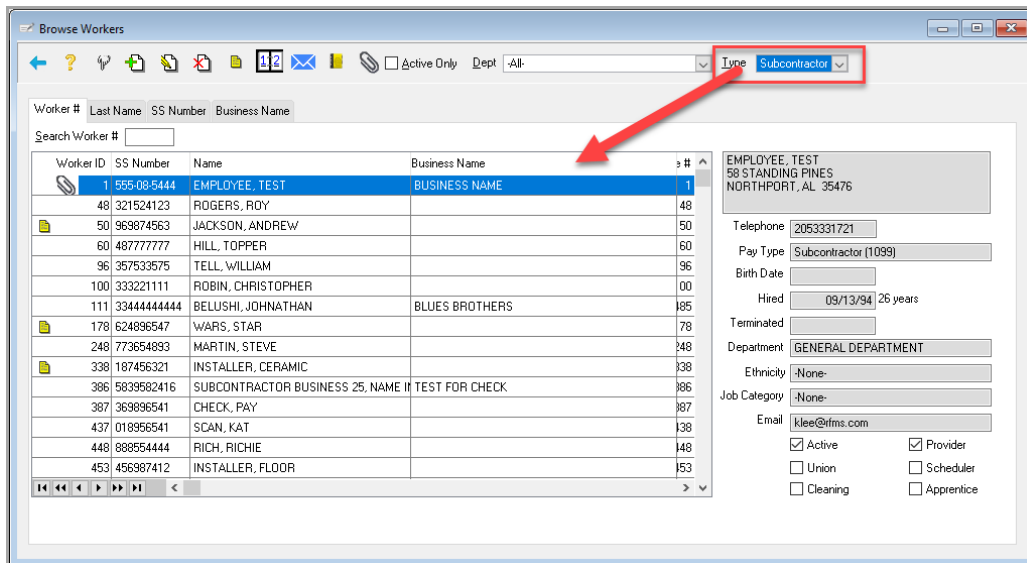
The Estimate Number has been added to the file name for Word Merge files from BidPro.



Human Resources

Worker Information

A Business Name column has been added to the Worker Browse list when looking at Subcontractors.



941

The 941 Quarterly forms have been updated to the 3rd quarter revisions.

Sales Reports

Material Analysis

The Inventory PO Number and Promise Date have been added to the CSV file.

BW	BX	BZ	CA	CB
Bin Locati	PO Num	Ord	Inventory PO Num	Promise Date
			CG0 00410001	20200825
			#ST090360001	
			CG0 00420001	20200909
			CG0 00420002	20200909
			CG0 00430001	20200914
			CG0 00430002	20200914
	41759		CG0 00400001	20200831
	41759			
			CG0 00440001	20200923
			CG0 00440002	20200923

CMM

Workflow Actions

Action records such as appointments, tasks, letters, etc. created by Workflow Actions will display WORKFLOW GENERATED in the Created By and Edited By fields.

The screenshot shows a 'Changing Appointment' dialog box with several sections:

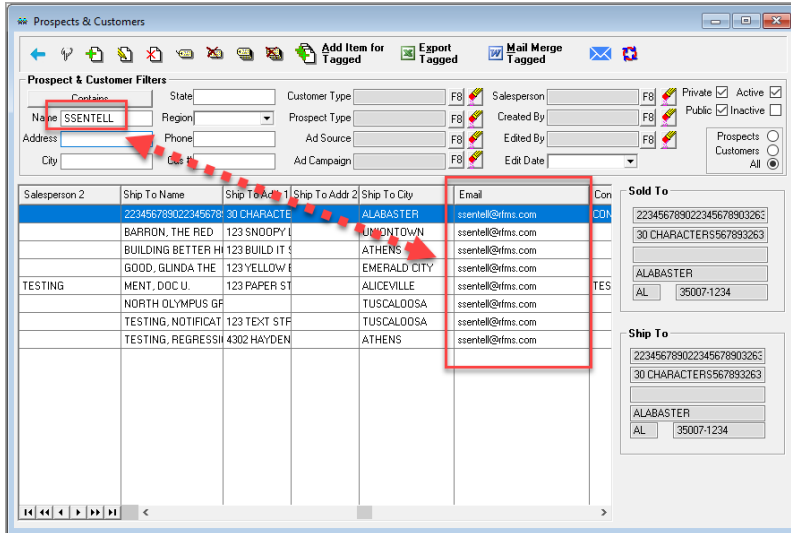
- Appointment Information:** Appointment ID: 16300, Type: IN HOUSE, Location: , Details: TEST.
- Appointment Status:** Assigned To: DDC.TEST, Status: Requested, Priority: Normal, Appt Status: Tentative, Appt Date: 08/20/20, Start Time: , End Time: , Date: 08/20/20, Time: 8:00 AM.
- Related To:** Record Type: PROJECT, Contract #: TESTING AGAIN, Project Name: DOCUMENT, Customer: MENT. DOC U., Phone #'s: 205-657-4000, 2021234567, EMail: .
- Record Information:** Date Created: 08/20/20, 12:58 PM; Created By: WORKFLOW GENERATED; Date Edited: 08/20/20, 12:58 PM; Edited By: WORKFLOW GENERATED; Viewing Rights: Public; Use As Template: .

Buttons at the bottom include 'Import Appointment Template', 'Accept', and 'Decline'.

Prospects and Customers

Email address has been added to the Prospects and Customers Browse screen.

In the Name field, users can search for prospects and customers by email address.



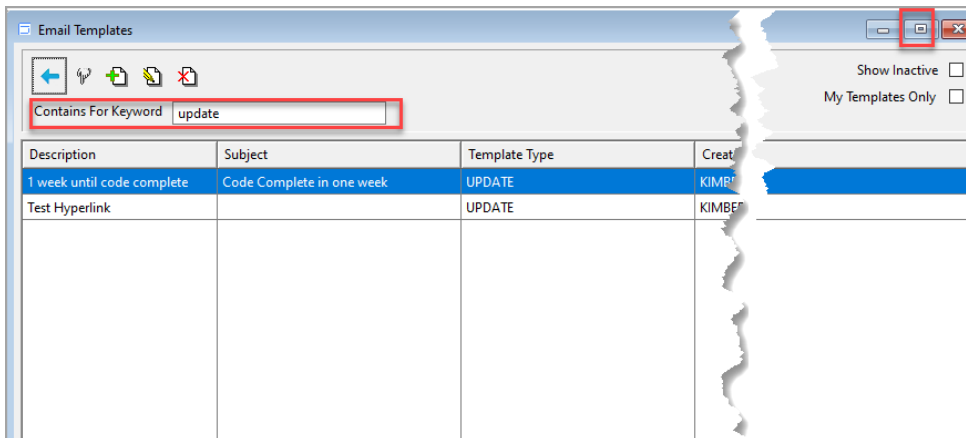
Utilities

Email Templates

Utilities>Client Management Set Up>Email Templates

The ability to maximize the screen has been added.

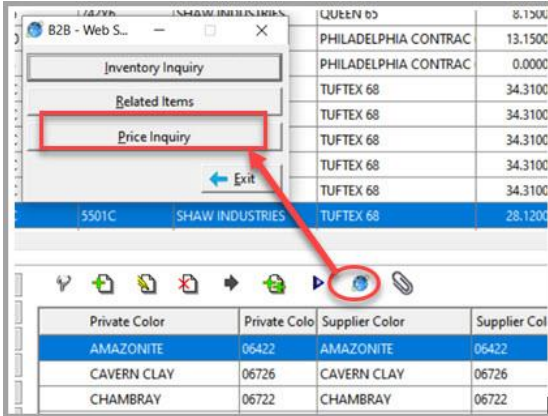
A keyword search has been added to the browse screen.



E-Commerce

Price Inquiry

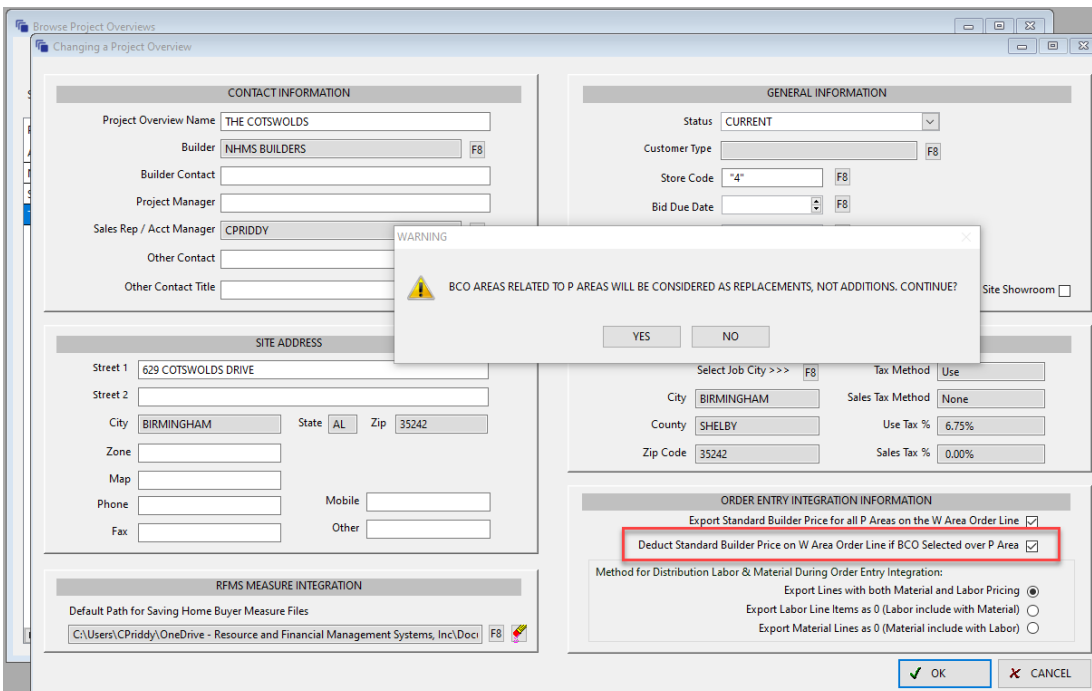
Price Inquiry in Order Entry, Products, and Inventory is now password protected. If using Enterprise Manager, the password can be set there also.



NHMS

Project Overview

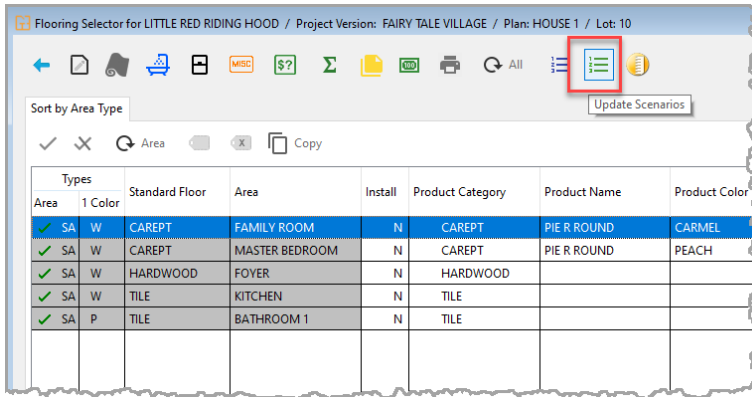
An option has been added to deduct Standard Builder Price on W lines when a BCO area is selected over a related P area.



Flooring Selector

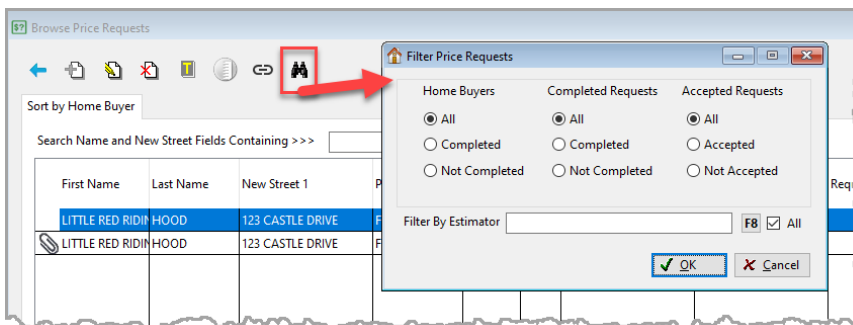
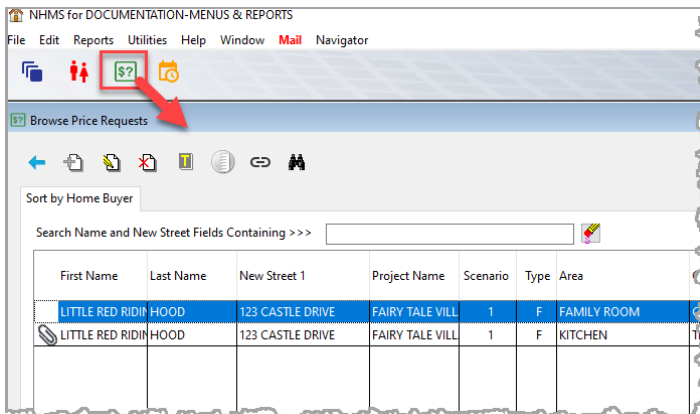
If the Install Type is changed, the product selection will not be reset if it can be installed with the new install type.

An Update Scenarios button has been added to the toolbar. This button will update all Home Buyer areas to match any changes made to the selected plan.

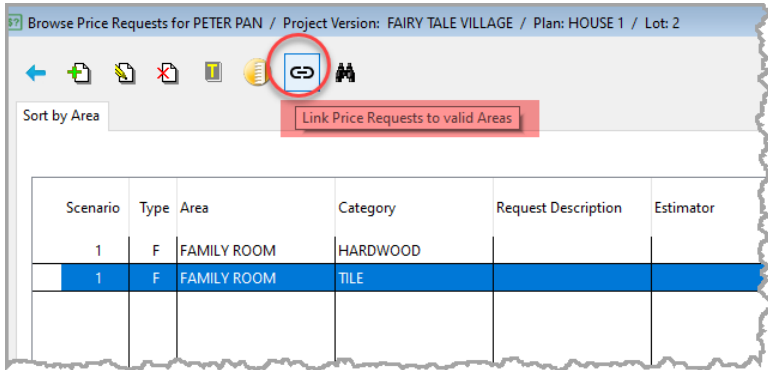


Price Requests

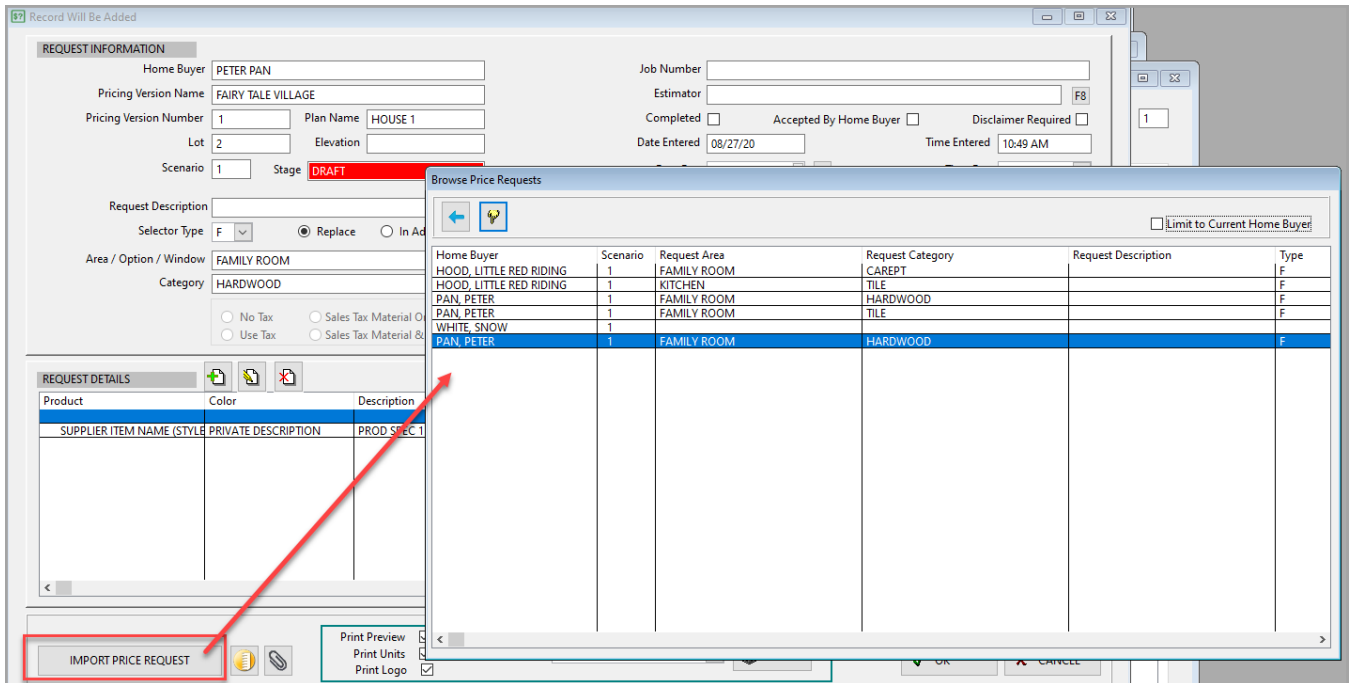
The toolbar has been updated. The Filters have been moved to the Find screen.



The ability to re-link Price Requests to valid Areas has been added to the toolbar.

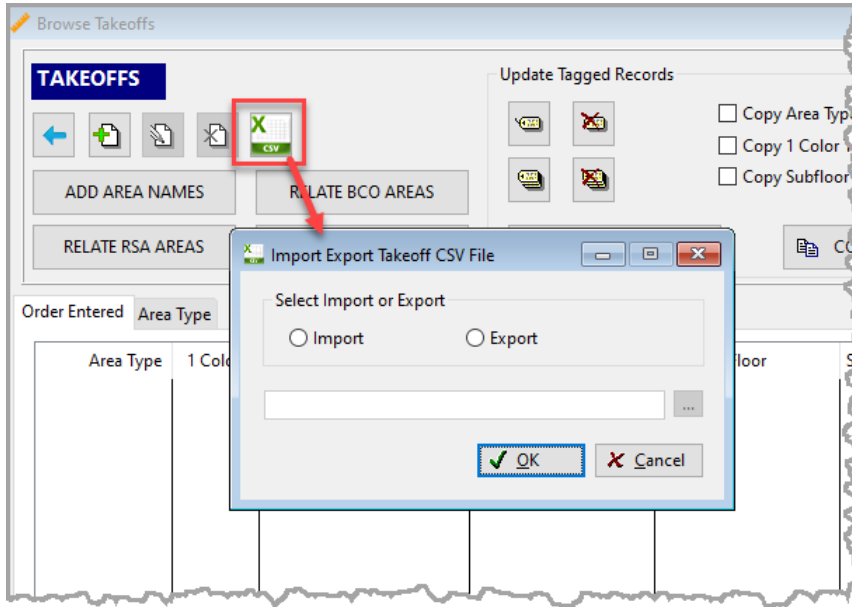


The ability to import Price Requests from other Home Buyers on the same plan has been added. Check the Limit to Current Home Buyer when other Home Buyers Price Requests are not to be viewed.



Takeoffs

When a takeoff is not in contract mode, the ability to import or export takeoffs via CSV has been added to the Browse Takeoffs screen.



NHMS Import

Pad lines no longer import to Order Entry as unreferenced when the product exist in RFMS.

20/20 Cabinet Design Integration

A tool has been added to integrate with XML files generated by 20/20 Cabinet Design. Requirements to use this new feature are

- Integration with Saberis
- 2020 Design Live Version with XML export
- Training/ Set Up time

To sign up, contact your CSM.