RFMS

Systems for Success

# Project Manager Module User Guide



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# Contents

# PM Overview

The Project Manager Module allows managing sales leads and tracking activity with them throughout the sales process.

This is an add-on module that extends the functionality of the core system. It is sold in user packs, and can be licensed in 2 levels. The license type will determine what features can be enabled by individual users.

### Retail Sales Manager

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

### Commercial Project Manager

- Project Data is any group of data to be tracked together.
- Each user can be set to any of the 3 modes.
- Includes all the features of Retail Sales Manager plus commercial specific reporting and project management.

The mode in use is indicated on the wallpaper. 


The Project Manager Module installation is available as a trial version. When the trial version is opened, a prompt to select the license type of the trial will display.


For purchase information see www.rfms.com.

# Installing and Running the Program

## Installing the Software

The Project Manager Module installation is included with all new RFMS installations and updates. It is initially installed as a trial version. When the trial version is opened, select the license type the trial should display.

This document addresses all three levels of licensing.

To purchase the program, please contact your account manager.

## RFMS General Features

These and other features are common among all RFMS Programs. Documentation on them may be found in the help files or online at [www.rfms.com](http://www.rfms.com) . [RFMS General Features Document]()

Customizable tool bars.

Interoffice Mail

Order Tracking

PDF History

User defined Interface Options. This is set in *Utilities>System Options>System Wide>General>interface Options*

Notes:

Microsoft Office must be Office 2007 or later for Microsoft Office tools inside of RFMS to function properly.

### Passwords

Get to the password set up by pressing F6 on any PM button just as in RFMS Core.

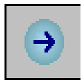
Some recommended password locations:

**Lists:** to keep data consistent; Ad Campaigns, Prospect Types, Checklist Records and Project Status
**Reports:** Restricts who has access to data on sales information and prospect and customers.
**Switch to Customer button** in Prospects & Customers to restrict when a record is added to the customer list, this should be password protected.
**Export Filtered Records to CSV** in Prospects & Customers: Pass wording this option restricts who can get a listing of all records.

# Sales Floor Manager

## Set up

First add a **location**:
*Utilities>Project Manager Set Up>Locations* *Click here for details.*

Click the Assign Leads button  to access the **SALES LEADS** module.

Next add salespersons to the **bull pen** (available list) for this **location**:
Click the **insert** button. This pulls up the RFMS Salesperson list. Checking in the **show inactive** box includes those Sales Rep in the list in gray.

The delete button allows deleting salespersons from the list.

Highlight the Sales Rep to add and click on the select button or double click on the name. Continue doing this until the list of active salespersons is completed. Salespersons can belong to more than one location if needed.

**Best Practice**
Salespersons can be associated to a PM user in *Utilities>Project Manager Set Up>Users and Alerts.*

Go to *Utilities>Project Manager Set Up* and set up:

Customer Ad Campaigns

Sales Lead Types

User Defined List for Sales Leads

Sales Leads Items

Go to *Utilities>System Options* and set up:

Sales Lead User defined List Name, Items and Choices

Sales Lead Lost number of days

Default location

### Changing User Status

Only those salespersons associated with users in *Utilities>Project Manager Set Up>Users and Alerts* can have a status. Clicking this button brings up the Browse User Status Screen. Highlight the user to change, then click on the Change User Status Button.

. This brings up a box allowing a new user status to be chosen.

This selection was a drop down list, but has been changed to a browse list which can be resized or moved on the screen.

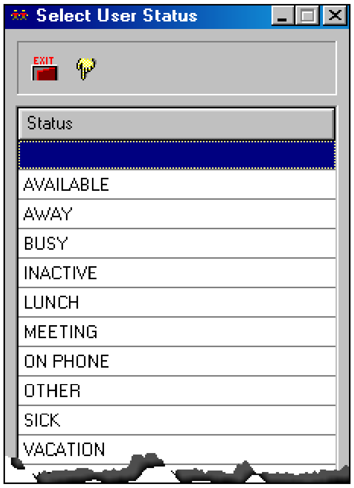



*Figure: Browse User Status Screen*

When a Users' Status is changed all other related users will be updated also. Related Users are determined by the Salesperson and Worker Names.

User Status can also be changed on the *Workbench or Utilities>View User Status or Manage Sales Leads>User Status*

# Sales Leads

### UtilnGeneral Operation

New Sales leads may be entered by accessing either the **Sales Lead Browse** 

or the **Manage Sales Leads**  area.

When accessing the **Assign Sales Leads** area, if salespersons are listed from multiple locations, the location to use must be selected.

All salespersons begin in the Bullpen; move them to Active Salespersons list by clicking on one of the two green arrows.

 Click the **left arrow** button to move a salesperson from the bullpen to the next spot in line.

If a salesperson needs to be taken from the active list for example for a meeting, this will move the salesperson back to their previous location. If the next salesperson has already had a turn then it will move them to the top of the list.

Once in the active salesperson list names can be moved up and down the list using the **orange up and down arrows.**

Salespersons can be moved back to the bullpen one at a time with the **single green arrow**, for example if they are gone for lunch.

The whole group can be moved back to the bullpen with the **multiple-green arrow** button, for example at the end of the day.

To show that a salesperson is currently working with a client; click the **assign** button.

## Manage Sales leads

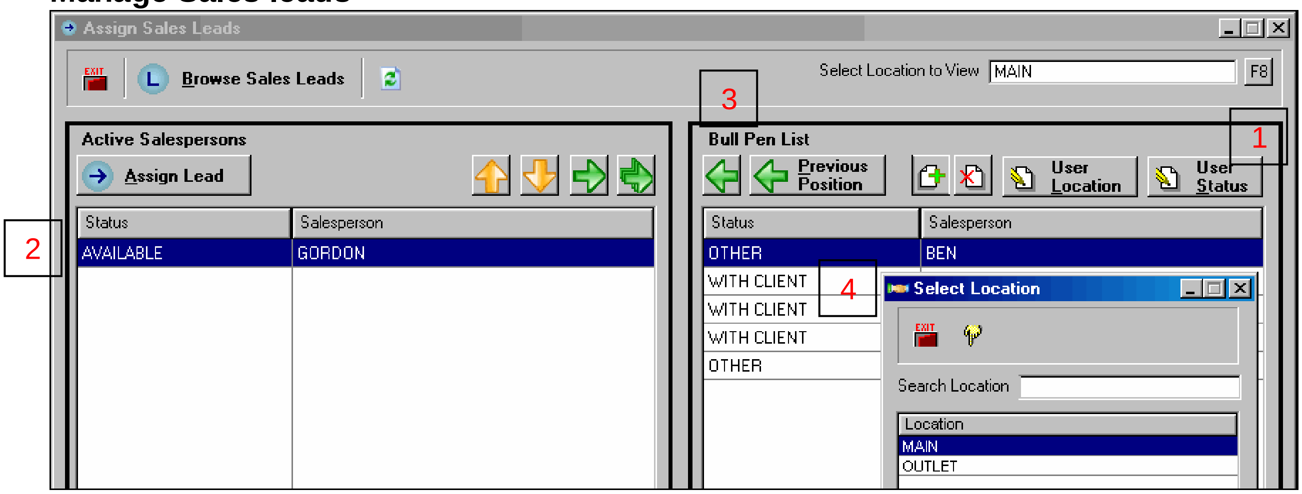


*Figure: Manage Sales Lead screen*

User Status will be displayed in the Active and Bull Pen browses. In order for the User Status' other than available, with client or other, to display the User will need to be linked to a Salesperson in Set Up.

A User's status can be changed when they are in the Bull Pen; Click the **Change User Status** button (1), then use F8 to see a drop down status list to choose from.

User Status will automatically be set to AVAILABLE (2) when moved into the **Active Salesperson** list.

To move a salesperson from one location to another, click the **change user location** button (3), then choose the location from the drop down list.

User Status will automatically be set to **WITH CLIENT** (4) when assigned.

User Status will automatically be set to **OTHER** when moved out of the Active Salesperson list but not assigned to a client.

To show that a salesperson is currently working with a client click the assign button

. This will go to the Adding Sales Lead Screen where selecting an existing record or adding a new one are options. If a salesperson is assigned to a prospect or customer that is already associated with other salespersons then a warning message will be displayed.

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## Add or Edit a Sales lead

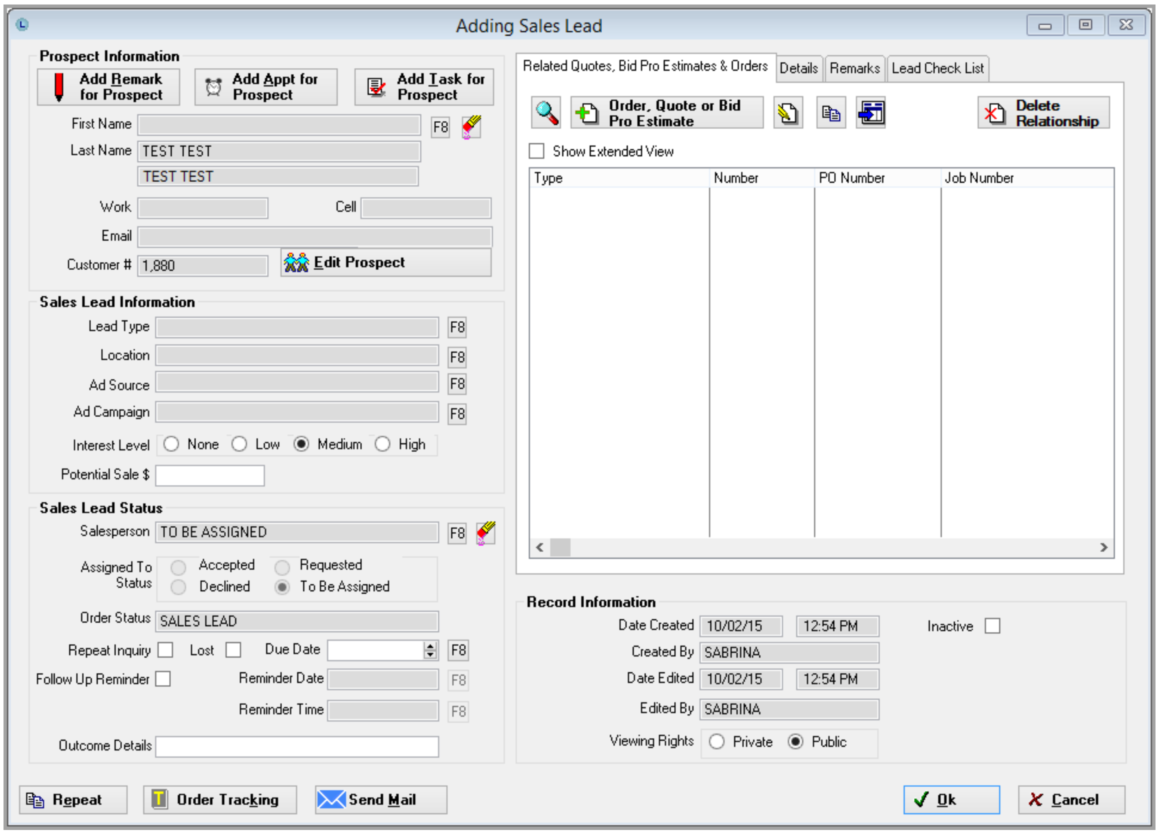



*Figure: Adding Sales Lead Record*

### Contact Information

The header at the top of this section will tell if the lead contact is a Sales Lead only, or related to a Customer or a Prospect.

Prospect/Customer: Type in information or click F8 to select an existing Prospect/Customer if desired. If the sales lead is related to an existing Prospect or customer, the record number will be listed in this section.

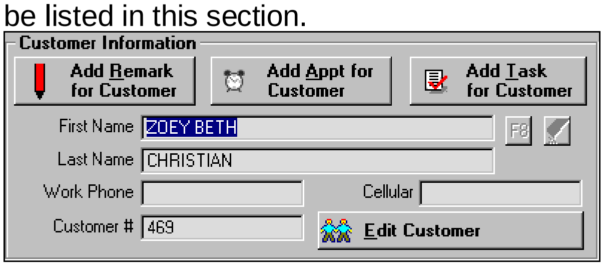



*Figure: Sales Lead related to a customer*

Limited information about a new Prospect/Customer can be entered directly on this screen. This information can then be exported to a new Prospect/Customer record or just stored in the Salesperson up record only. The lead no longer has to be associated with a Prospect/Customer record.

### Clear Prospect/Customer 

This will sever the relationship between the Sales Lead and the Customer/Prospect record. This is only available when adding a new Sales Lead.


Add/Edit Button will display either "Add Prospect/Customer" or "Edit Prospect/Customer" depending on if a Customer record has been related already or not.  If First Name, Last Name or Telephone numbers change during the adding or editing of the Prospect/Customer then the Sales Lead record will be updated.


The following list of Prospect/Customer fields will default to the Sales Lead data when adding a new Prospect/Customer from this screen.

Salesperson
Location
Ad Source
Ad Campaign
Customer Name
Telephone 1
Telephone 2
Interest Level

If a prospect/customer is added from here, the **Prospect type** will automatically be **"Sales Lead"** and cannot be changed.

If trying to add a Prospect/Customer record that is a duplicate of an existing one, then the user will be notified before attempting to add a new record. If yes is answered, the software will add a dot at the end of the name to avoid having a duplicate name.

### Lead Type

These selections have been added for more detailed reporting of Sales leads. The options for this are set in *Utilities>Project Manager Set Up>Sales Lead Types.*

A Sales Lead Type, **IPAD**, has been added to accommodate the RFMS Sales Pro Mobile IPad module.

**Location:**  If the lead is added via **Assign Sales Leads** this will be automatically filled in, otherwise click **F8** to choose a location.

**Ad Source:** Click **F8** to choose a source from the list created in *RFMS>Order Entry>Utilities>Settings>Ad Source.*

**Ad Campaign:** Click **F8** to choose a campaign from the list created in *Utilities>Project Manager Set Up> Customer Ad Campaigns*

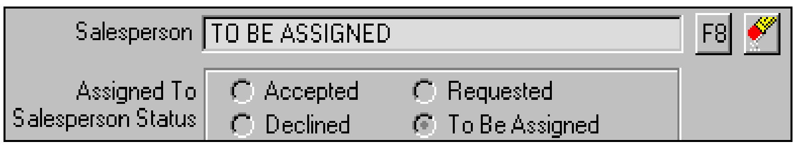
**Interest Level:** Click to choose a level.  An interest level of high shows as high priority in listings.

**Potential Sale:** Track the potential sales dollar amount.

**Salesperson:** Click **F8** to select a different salesperson

### To Be Assigned

Sales Leads can now have a status of **to be assigned**.
In the Assigned to field, use the clear button and the current user becomes **to be assigned.**
The record status also becomes **to be assigned.**




Records that are **To Be Assigned** will be considered to be associated with the Created by user until it has been assigned and accepted by the assigned to user. These records will be marked with a blue arrow on the Created by Users' workbench and browse screens. .

### Status

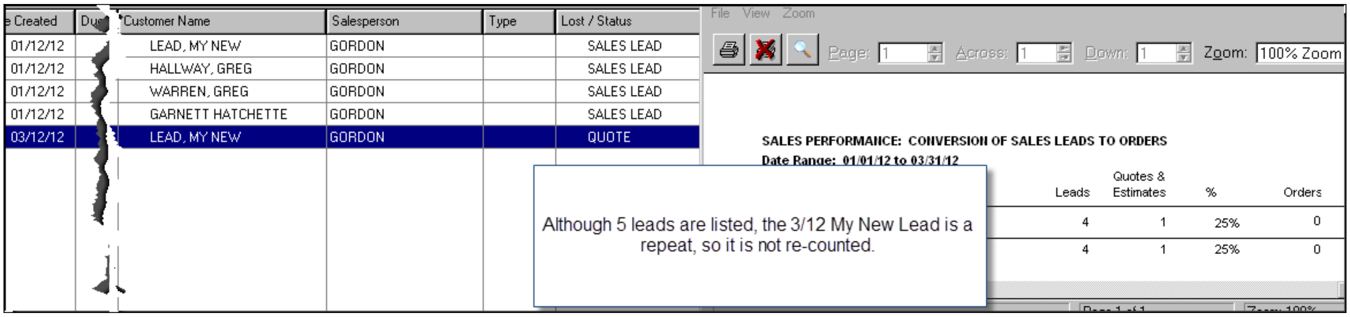
Status is no longer manually set on the add/edit Sales Lead screen. It now automated and can be Sales Lead, QUOTE, BID PRO ESTIMATE or ORDER.  This field is now read only. Sales Lead Statuses are updated every time the Browse Sales Lead is opened or the Reports Menu is opened.
Completed now refers to Leads that have gone to Order Status.

Outstanding - Status = Up, Quote or Bid Pro Estimate
Completed - Status = Order

**Repeat Inquiry:** Check this box if this is a repeat customer

### Counting leads

Leads marked as repeat, will not be counted in sales lead counts for the Conversion of Sales Leads to orders or Summary Overall performance reports. BidPro Estimates, Quotes or Orders associated with repeat leads will be counted.  This means if a lead opportunity happens with no BidPro Estimate, Quotes or Order, then same person comes in again and a repeat lead is created and a quote is related to this lead, the net count would be 1 lead with 1 quote.




**Lost:** For a sales lead to be considered lost it will need to be marked on the record, or meet the criteria set for a lost lead set in *Utilities>System Options>Project Manager>Sales Leads*

**Due Date** refers to the date that the Assigned To user needs to complete the record. Sales Leads will appear in red text on the workbench or in the browse screens if they are past due or are due today.

**Repeat:** Repeat Click the repeat button to choose an existing sales lead record to copy into the sales lead being created. This would be the only way to create a repeat of a sales lead record for a lead which is not a customer or a prospect.

**Follow Up Reminder:** A follow up reminder with date and time can be added to an up record.

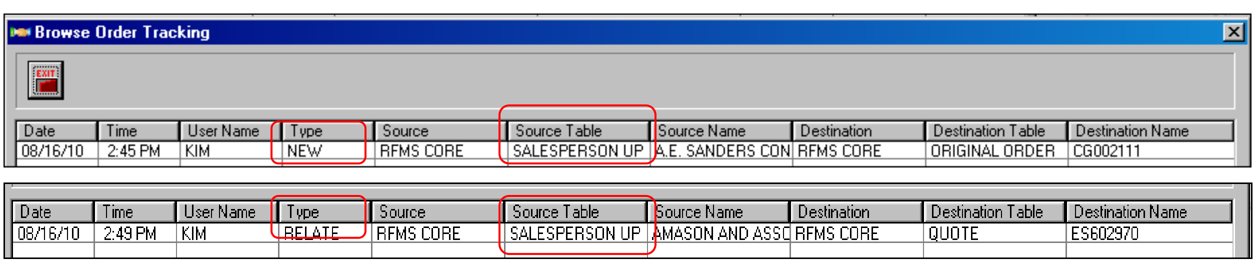
**Outcome Details:** Allows typing in any description

## Exporting

In version 11.0, the Export and Relate features were moved from Browse Sales Leads to Update Sales Lead screen, and now are all under the export button. In version 11.2 this function was moved from the Add/Edit Sales lead main screen to the Related Quotes, Bid Pro Estimates & Orders tab.

**Order Tracking**: When a sales lead is used to create an Order, Quote or Bid Pro Estimate or is related to one of those, a **tracking** record is created. Click the **tracking** button to see the details. The source for these records will be listed as the customer name.

If there are no orders the **tracking** button on the button will be gray.




*Figures: Tracking Record New and Related*

## Lead Tabs


### Details
This is an area to add notes specific to this lead only. They cannot be viewed via view all notes and remarks.

### Remarks
These are automatically added remarks specific to lead opportunities from the web; remarks can be added to the Prospect/Customer that the lead is related to.

### Leads List Tab
A User Defined List can be set up for processing leads. This is a separate list from the one set for Prospects and Customers.

*Utilities>Project Manager Set Up>Sales Lead User Defined Items*
Set up the items in the list. When creating the list remember there will be up to 6 status choices for these items. These items will be listed alphabetically, so numbering them is one way keep them in a logical order. If items are added and the list needs to be renumbered, the system will automatically change the names already in use.

***Some example list items:***

1. Took Sample
2. Send follow up letter
3. Schedule Measure
4. After Measure Call
5. Prepare Quote
6. Send Quote
7. Send Thank you letter
8. Projected Installation Date
9. 

*Utilities>System Options>Project Manager>Sales Leads*
Set up the name for the list.

***Example: Lead Check List***

Set up the name for the items list

***Example: Items***

Set up the status choices including the default status.

***Examples:***

Default: To be done
Status 1: Yes
Status 2: No
Status 3: Not Applicable
Status 4: Less than 3 Mo
Status 5: More than 3 Mo

If a status choice is changed the new label will apply to any records where that choice has previously been used. For example if choice 2  was changed from no to maybe, anything already set to no will be changed to maybe.

The Auto Populate button will add **all active items** in the list to the Sales Leads with the **default** status.  Change Status will toggle through the statuses set up. In the example above click **change status** once to change from the default to be done, to status 1 yes.

Here is the example list auto populated and then in progress:

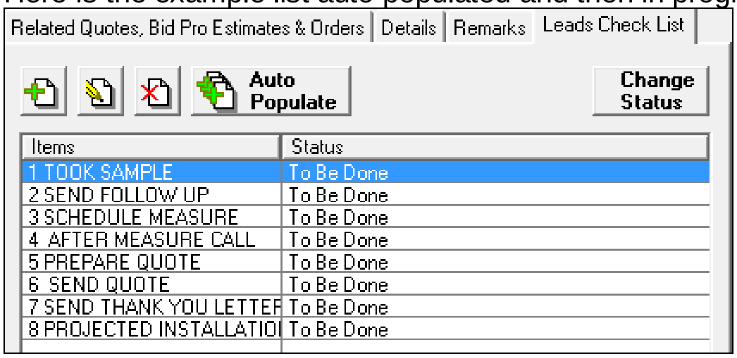



*Figure: Sales Lead User Defined List Auto populated*

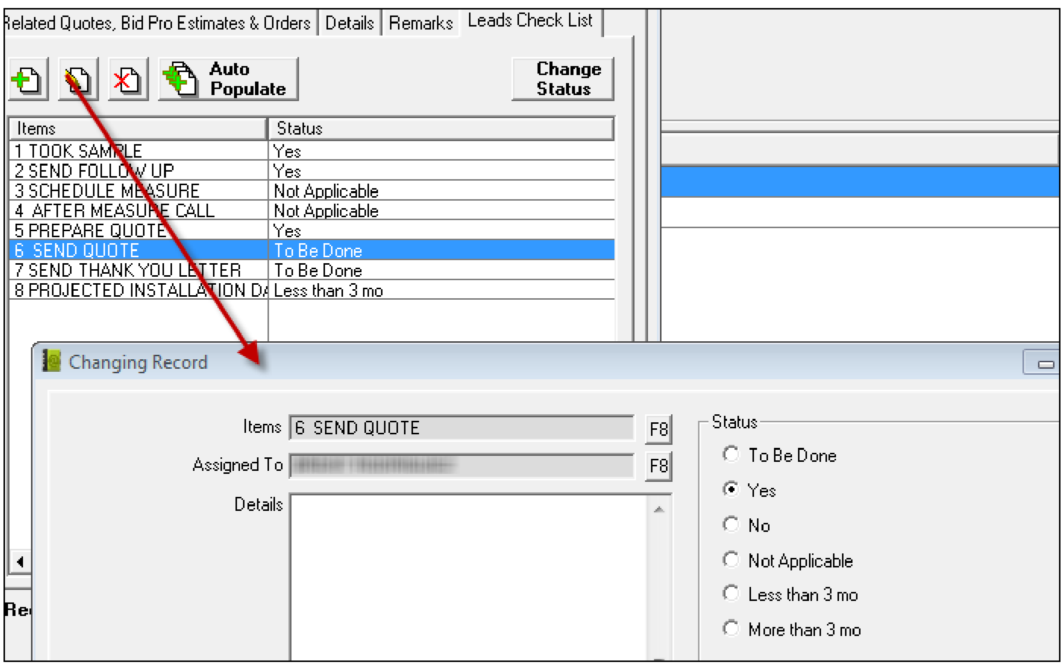
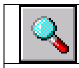
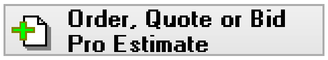



*Figure: Sales Lead User Defined being edited*

## Related Quotes, Bid Pro Estimates & Orders

This tab lists Quotes, BidPro Estimates and Orders related to the lead.

When extended view is NOT checked it only shows records that directly related to the highlighted record.  This means that the highlighted record will either be the source or the destination in the order tracking record.  When extended view is check it shows records that are directly related to the highlighted record AND any record that is directly related to these.

| | |
|---|---|
|  | Click the **View** button to see the details of the record. |
|   | Click the **Insert** button to create either an RFMS order, quote, or a Bid Pro Estimate or sub estimate or can be related to an existing Quote (Primary or Related), Order or Bid Pro Estimate (or sub-estimate). |
|  | Click the **Edit** button to make changes to quotes, Bid Pro estimates or customer orders including claims and overages. |
|  | Click the **Export** button to export the highlighted Bid Pro Estimate or Quote to a Customer Order. |

## View/Edit Details

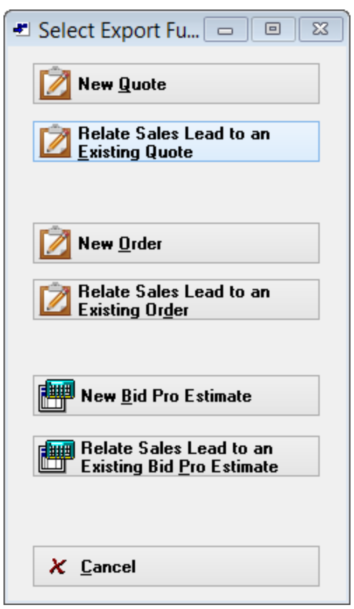
Password protection will be based on the Edit Button in Order Entry.

If an Order is part of a Billing Group and the user requests to View the Order from inside Project Manager, the Billing Group screen will open in Read Only Mode with limited capabilities.

Billing Groups can be edited from inside Project Manager Projects and Sales Leads. Password protection will be based on the Edit Button in Order Entry Browse Orders.

If an Order is an Overage and the user requests to View the Order from inside Project Manager, the Overage screen will open in Read Only Mode with limited capabilities.

## Insert Details




Insert is only available for sales leads which have been associated with a customer or a prospect. (Exporting a prospect record is only available if a system option is not set to limit quotes or estimates to Customers only.) The store for the RFMS record is determined first by the use the Single Store to Process for Order Entry if it exists. Otherwise it will default to the Customer Store.

If the sales lead is not a customer or a prospect the options are:

Add the sales lead information as a prospect or customer.

Once a Sales Lead is switched to a Customer, information can only be edited in Order Entry/Customer

Instead go directly to Customer Orders or Quotes and Import the sales lead. This will change the status of the lead and create a tracking record.

When clicking the **Insert** button a pop screen will offer the following choices. Bid Pro choices will not be enabled if user does not have Bid Pro. Relate is no longer a separate button, but a choice from the export button.

An option to relate a Sales Lead to an existing Order was added in version 11.1. The lead must be either a prospect or a customer for this option to be available. An Order tracking record is added, and the lead status is changed to Order.

Export to New Quote
Export to New Related Quote
Relate to Existing Quote
Relate to Existing Order
Export to New Bid Pro Estimate
Export to New Bid Pro Sub Estimate
Relate to Existing Estimate

The Lead status will then be changed to Quote or Bid Pro Estimate as is appropriate. The email address and ad source are exported with the sales lead.

Relating a quote or bid from a sales lead creates a record in the **view related records** listing in the **remote actions** screen.

Depending on the choice made a screen will display allowing entry of the needed information.

If a related quote or sub-estimate is created, the browse all records screen with the appropriate record type filter will prompt choosing a primary record. More search criteria can be entered to further limit the choices.

User system option requirements estimated delivery date and zip code for creating quotes, will be respected by the PM export to quote.

When a Sales Lead has been successfully exported to a new Bid Pro Estimate or Quote, after the header record is created, the Quote or Bid Pro Estimate will open for editing.

### Changes to the related Record

As of version 11.0, if the original Customer Record Type was 'SALES LEAD' then the related Quotes, and Orders listed in the Tracking table will be updated when the Prospect/Customer is changed.

If the original Customer Record Type was either 'PROSPECT' or 'CUSTOMER' then a message will display questioning whether or not the related Quotes or  Orders listed in the Tracking table should be updated when the Prospect/Customer is changed.

Quotes, Orders and Estimates fields that will be updated when the Prospect/Customer is changed are Customer Name, Customer Full Address, Telephone 1, Telephone 2 and Email.

If the original Customer Record Type was 'PROSPECT' then a message will display questioning whether or not the original Customer PROSPECT record should be deleted from the Customer file when the Prospect/Customer is changed.

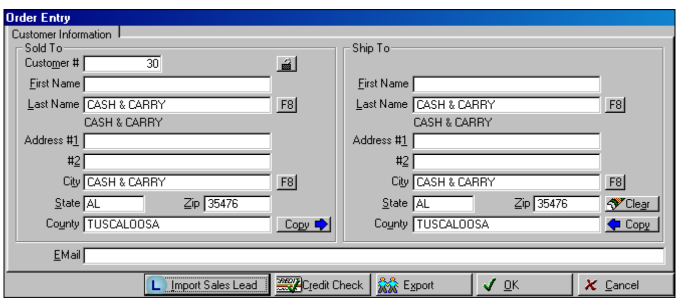
If a Quote or Order is related to a Sales Lead AND that Sales Lead is not related to **any other** Quote or Order, then the Sales Lead Prospect/Customer will be updated when the Quote Prospect/Customer is updated.

**Record Information:** This is standard information found on all PM records. Click here for details.

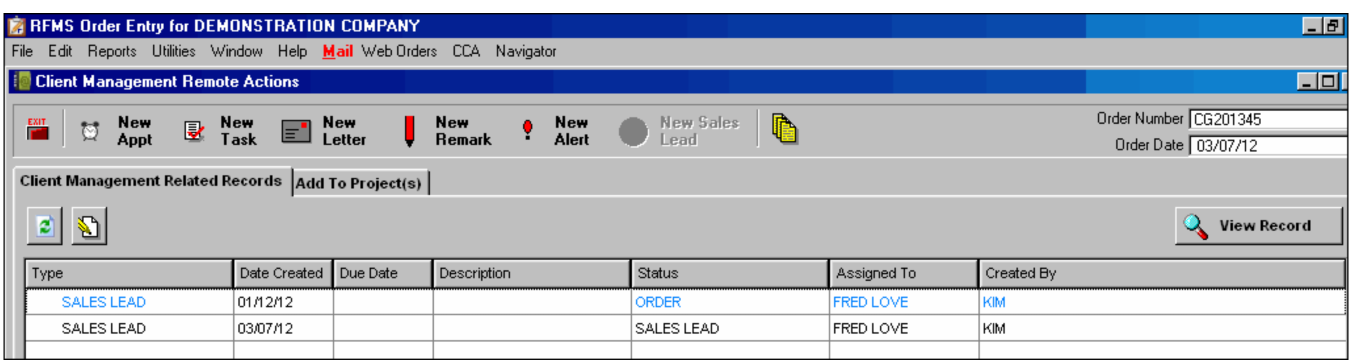
Once a sales lead has been associated with a Prospect or Customer, it can be used to create a new record.

### Import Sales Lead into RFMS

While in an RFMS order or quote, a sales lead can be imported into the order or quote.  For this to be available the option Customers from Customer File only cannot be set to yes.  An Order tracking record is added, and the lead status is changed to Order.

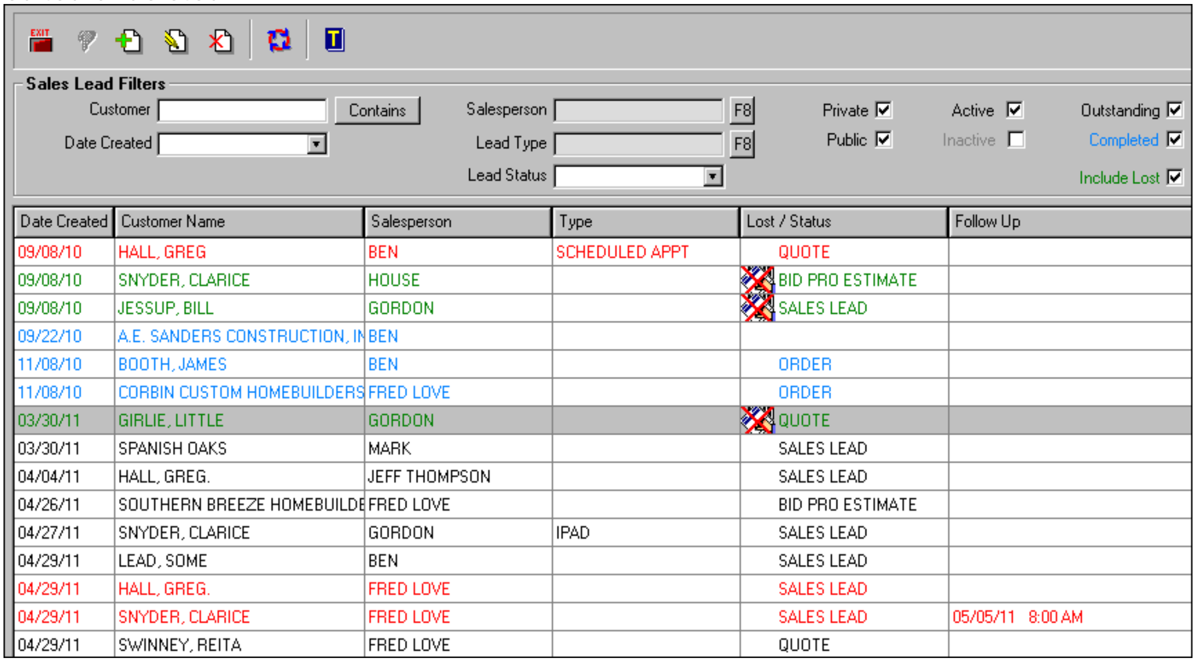



If an item is related to a Sales Lead record then the most recent Sales Lead record can be viewed. For example, an order is related to a lead created on 1/12/12, when a new sales lead is created for the same customer on 3/7/12 that lead is also shown on the order.



## Browse Sales Leads


The BROWSE SALES LEADS button on the **main** screen or on the **Assign Sales Leads** screen goes to a list of assignments that have been made. Once here an assignment can be edited or deleted.




| Date Created | Customer Name | Salesperson | Type | Lost / Status | Follow Up |
|---|---|---|---|---|---|
| 09/08/10 | HALL, GREG | BEN | SCHEDULED APPT | QUOTE | |
| 09/08/10 | SNYDER, CLARICE | HOUSE | | BID PRO ESTIMATE | |
| 09/08/10 | JESSUP, BILL | GORDON | | SALES LEAD | |
| 09/22/10 | A.E. SANDERS CONSTRUCTION, IN | BEN | | | |
| 11/08/10 | BOOTH, JAMES | BEN | | ORDER | |
| 11/08/10 | CORBIN CUSTOM HOMEBUILDERS | FRED LOVE | | ORDER | |
| 03/30/11 | GIRLIE, LITTLE | GORDON | | QUOTE | |
| 03/30/11 | SPANISH OAKS | MARK | | SALES LEAD | |
| 04/04/11 | HALL, GREG. | JEFF THOMPSON | | SALES LEAD | |
| 04/26/11 | SOUTHERN BREEZE HOMEBUILDE | FRED LOVE | | BID PRO ESTIMATE | |
| 04/27/11 | SNYDER, CLARICE | GORDON | IPAD | SALES LEAD | |
| 04/29/11 | LEAD, SOME | BEN | | SALES LEAD | |
| 04/29/11 | HALL, GREG. | FRED LOVE | | SALES LEAD | |
| 04/29/11 | SNYDER, CLARICE | FRED LOVE | | SALES LEAD | 05/05/11 8:00 AM |
| 04/29/11 | SWINNEY, REITA | FRED LOVE | | QUOTE | |

If included in the filter:
**Assigned to Status = Requested** a Green Question mark will display.
**Assigned to Status = To be assigned** a Blue Arrow will display.
**Assigned to Status = Declined** a red x will display.

**High Priority Items** will have a red arrow displayed next to them.
Leads will appear in red text on the workbench or in their browse screens if they are past due or are due today.

> Inactive – Gray (Must be marked inactive on the Sales leads record)
> Completed - Blue (Status = Order or Lost)
> Lost – Green Also indicated with the symbol.

When filtering by Salesperson, sales leads will display if the Salesperson is the filtered salesperson and the Assigned to Status = Accepted or Requested.

Filters were added Outstanding and Completed
> Outstanding - Status = Sales lead, Quote or Estimate
> Completed - Status = Order or Lost

A new Sales lead can be added directly from this screen by clicking the insert button.

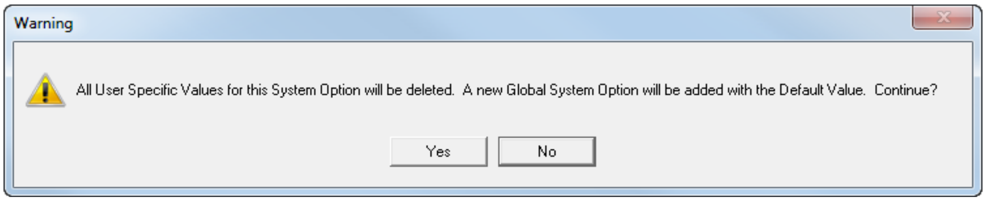
# Utilities

## System Options

*>Utilities>System Options>Project Manager*

System Options is divided into two sections; user and administrator. The user section will display only those options which can be changed by the individual user this list depends on the how the administrator has defined the options.

The administrator has access to all system options

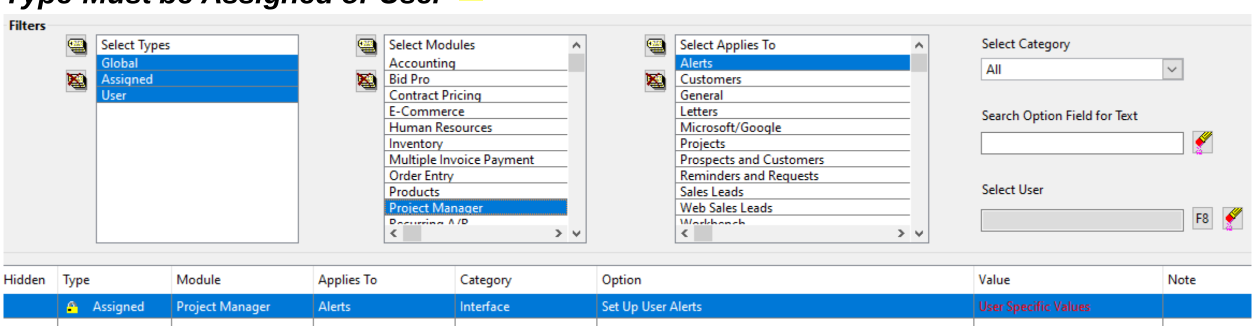



[Click here for documentation on system options in general.]

### Alerts

*>Utilities>System Options>Project Manager>Alerts*
*Category-Interface*

***Type-Must be Assigned or User***




The actions which will create alerts for individual users can be set for all users from the Administrative section, but it cannot be made a global type.

Check the boxes for the user to receive an alert when the action occurs to an order on which they are the salesperson.

A single user probably would not want to receive all possible alerts as this would be too much information to process efficiently. Instead check only the alerts relating to a specific job function. For example; the salesperson on a job might want to get alerts when orders lines are changed from on order to know that material has been received.

Also once alerts are turned on be sure to check and delete them regularly so they do not become unmanageable.


## Customers

***Allow User to Edit Customers in Project Manager***

*x>Utilities>System Options>PM>Customers*

*Category-Authorization*

***Type- Can be Global, Assigned or User***

| Type | Module | Applies To | Category | Option | Value |
|---|---|---|---|---|---|
| Assigned | Project Manager | Customers | Authorization | Allow User to Edit Customers in Project Management | User Specific Values |

This option allows specific users the ability to edit Customers in Project Manager.  Fields on the Additional Information tab are still disabled in Project Manager.

Notes: This is initially set to only be viewed/edited by an administrator.

## General

*>Utilities>System Options>Project Manager>General*

## General-Authorization

*>Utilities>System Options>Project Manager>General*

*Category- Authorization*

| Type | Module | Applies To | Category | Option | Value |
|---|---|---|---|---|---|
| Assigned | Project Manager | General | Authorization | Project Management Mode | User Specific Values |

## Project Manager Mode

***This is locked at type assigned.***

To set it as if it is global, simply assign all users the same value.

Sales Floor Manager

- SALES LEAD Tool: Who is next in line, Tracks store traffic, measure close ratio.
- All users will only be allowed to run in Sales Floor Manager Mode.

Retail Sales Manager

- **Contact Relationship Management**: This allows tracking of any type contact**,** prospect or client.

- Each user can be set to either mode Retail Sales Manager Mode or Sales Floor Manager Mode.

Commercial Project Manager

- Project Data is any group of data that to be tracked together.
- Each user or login can be set to any of the 3 modes.

With the user or login licensed for lower levels, only the options for that level will be available, the other options will be grayed out as shown on the file menu screenshot.


*Figure: Licensed for Sales Floor Manager*

## General-Data Transfer

*>Utilities>System Options>Project Manager>General*
*Category- Data Transfer*

***Type- Can be Global, Assigned or User***

| Type | Module | Applies To | Category | Option | Value |
|---|---|---|---|---|---|
| User | Project Manager | General | Data Transfer | Use Upper and Lower Case for CSV Exports | User Specific Values |
| User | Project Manager | General | Data Transfer | Use Upper and Lower Case for Microsoft Word Mail Merge | User Specific Values |

**Use Upper and Lower Case for csv exports**
**Use Upper and Lower Case for Microsoft Word Mail Merge**
Setting these options to yes will change the case to mixed versus the default of all capitals.

| Yes | No |
|---|---|
| Chuck Hardy<br>Hardy Chevrolet<br>125444 Chuck Hardy Pkwy<br>Atlanta Ga 30303 | HARDY, CHUCK<br>HARDY CHEVROLET<br>125444 CHUCK HARDY PKWY<br>ATLANTA GA 30303 |

## General-Default Filters

*>Utilities>System Options>Project Manager>General*
*Category- Default Filters*

***Type- Can be Global, Assigned or User***

| Type | Module | Applies To | Category | Option | Value |
|---|---|---|---|---|---|
| User | Project Manager | General | Default Filters | Assigned To User Only | User Specific Values |
| User | Project Manager | General | Default Filters | Created By User Only | User Specific Values |
| User | Project Manager | General | Default Filters | Include Active Items | User Specific Values |
| User | Project Manager | General | Default Filters | Include Completed Items | User Specific Values |
| User | Project Manager | General | Default Filters | Include Inactive Items | User Specific Values |
| User | Project Manager | General | Default Filters | Include Outstanding Items | User Specific Values |
| User | Project Manager | General | Default Filters | Include Private Items | User Specific Values |
| User | Project Manager | General | Default Filters | Include Public Items | User Specific Values |

These settings define the default for records included in all Project Manager browse lists except Prospects & Customers and the Workbench. These two browses have their own settings. When teaching the system these can be set globally so all users see the same thing, and then changed to assigned or user. The possibilities for these options are either yes to include or no to not include. Remember this is just the default. The items marked no can be viewed by changing the filter.

**Assigned to user only**: Mark yes to see only your items.
**Created by user only:** Do not mark yes if others create items and assign them to you.
**Include active items:** Usually will be marked yes.
**Include completed Items:** Mark yes only if interested in historical data.
**Include inactive items:** Mark yes only if interested in historical data.
**Include outstanding items:** Usually will be marked yes.
**Include private items:** This would only be marked No by an administrator who only wanted to see others items when they were included in a filter.
**Include public items:** This depends on how your company uses the public/private options.

## Letters

*X>Utilities>System Options>Project Manager>Letters*
*Category Reporting*

| Type | Module | Applies To | Category | Option | Value |
|---|---|---|---|---|---|
| User | Project Manager | Letters | Reporting | Header Image | User Specific Values |

### Header Image

***Type- Can be Global, Assigned or User***

This is the logo that will be inserted onto letters printed from PM. Changing the value allows browsing to find the file to attach.

## Microsoft Outlook

*X>Utilities>System Options>Project Manager>Microsoft Outlook*
*Category Data Transfer*

***Type- Can be Global, Assigned or User***

| Type | Module | Applies To | Category | Option | Value |
|---|---|---|---|---|---|
| User | Client Management | Microsoft Outlook | Data Transfer | Automatically Add CMM Appointments to Outlook | Yes |
| User | Client Management | Microsoft Outlook | Data Transfer | Automatically Add CMM Tasks to Outlook | Yes |
| User | Client Management | Microsoft Outlook | Data Transfer | Automatically Update and Delete CMM Appointments in Outlook | Yes |
| User | Client Management | Microsoft Outlook | Data Transfer | Automatically Update and Delete CMM Tasks in Outlook | Yes |
| User | Client Management | Microsoft Outlook | Data Transfer | Populate Outlook Reminder Fields | Yes |
| User | Client Management | Microsoft Outlook | Data Transfer | Synchronize User with Outlook | Yes |

*Figure: Outlook Options*

### Automatically Add PM Appointments to Outlook

Set this option to yes to automatically add new items entered by and assigned to the current user to Outlook for this user.

### Automatically PM Tasks to Outlook

Set this option to yes automatically add new items entered by and assigned to the current user to Outlook for this user.

### Automatically Update & Delete PM Appointments in Outlook

Set this option to yes to automatically apply edits and deletes to items changed in PM which have been entered into Outlook.

### Automatically Update & Delete PM Tasks in Outlook

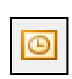
Set this option to yes to automatically apply edits and deletes to items changed in PM which have been entered into Outlook.

### Synchronize user with Outlook

Setting this option to yes so will make other options available. This will synchronize with the outlook files for this user.

### Populate Outlook Reminder fields

Set this option to yes to export reminder information from PM to Outlook.

Items which have been sent to Outlook will have this button next to them. 

To get rid of the annoying pop ups for Outlook Security install this 3rd party security software that facilitates Allowing and Blocking specific applications for Outlook.
http://www.mapilab.com/outlook/security/

## Projects

*X>Utilities>System Options>Project Manager>Projects*
*Category Prompts*

| Type | Module | Applies To | Category | Option |
|---|---|---|---|---|
| Global | Project Manager | Projects | Prompts | Date Field 1 |
| Global | Project Manager | Projects | Prompts | Date Field 2 |
| Global | Project Manager | Projects | Prompts | Date Field 3 |
| Global | Project Manager | Projects | Prompts | Date Field 4 |
| Global | Project Manager | Projects | Prompts | Date Field 5 |
| Global | Project Manager | Projects | Prompts | Date Field 6 |
| Global | Project Manager | Projects | Prompts | User Field 1 |
| Global | Project Manager | Projects | Prompts | User Field 2 |
| Global | Project Manager | Projects | Prompts | User Field 3 |
| Global | Project Manager | Projects | Prompts | User Field 4 |

*Figure: Project Prompts*

## Project Prompts

***Type- Can be Global, Assigned or User***

Entering these labels in ALL CAPS, distinguishes them from the system set fields.

### Date Labels

These are used in project data and reports. These will be the milestone dates tracked for project steps.

### User Defined Labels

These are used in project data "General Information". Use these for any information to be readily available about a project.

## Prospects & Customers-Default Filters

*X>Utilities>System Options>Project Manager>Prospects & Customers Category Default Filters*

***Type- Can be Global, Assigned or User***

| Type | Module | Applies To | Category | Option | Value |
|---|---|---|---|---|---|
| User | Project Manager | Prospects and Customer | Default Filters | Created By User Only | No |
| User | Project Manager | Prospects and Customer | Default Filters | Include Active Items | Yes |
| User | Project Manager | Prospects and Customer | Default Filters | Include Inactive Items | No |
| User | Project Manager | Prospects and Customer | Default Filters | Include Private Items | Yes |
| User | Project Manager | Prospects and Customer | Default Filters | Include Public Items | Yes |
| User | Project Manager | Prospects and Customer | Default Filters | Record Type | All |
| User | Project Manager | Prospects and Customer | Default Filters | Sales Representative | DEBBIE KENNEDY |

*Figure: Prospect and Customer Default Filters-User Browse List*

These options define the default filter for the Prospect and Customer Browse list. The list filters can be reset but will be go back to the default settings each time the browse list is reopened.

### Created by User Only

Setting this to yes will default to only listing records created by the logged in user.

### Include Active Items

Setting this to yes will default to including active records in the listing.

### Include Inactive Items

Setting this to yes will default to including inactive records in the listing.

### Include Private Items

Setting this to yes will default to including private records in the listing.

### Include Public Items

Setting this to yes will default to including public records in the listing.

### Record Type

Select to list ***All*** records, ***Customers Only*** or ***Prospects Only.***

### Sales Representative

Select a sales representative name to default to including only that sales representative's records in the list.

## Prospect & Customer Prompts

*X>Utilities>System Options>Project Manager>Prospects & Customers Category Prompts*

***Type- Can be Global, Assigned or User***

| Type | Module | Applies To | Category | Option | Value |
|---|---|---|---|---|---|
| Global | Project Manager | Prospects and Custome | Prompts | Affiliation | Affiliation Prompt |
| Global | Project Manager | Prospects and Custome | Prompts | User Defined List - Description | U.D. Description |
| Global | Project Manager | Prospects and Custome | Prompts | User Defined List - Field Name | U.S Field Name |
| Global | Project Manager | Prospects and Custome | Prompts | User Defined List - Status Choice 1 | U.D. Status Choice 1 |
| Global | Project Manager | Prospects and Custome | Prompts | User Defined List - Status Choice 2 | U.D. Status Choice 2 |
| Global | Project Manager | Prospects and Custome | Prompts | User Defined List - Status Choice 3 | U.D. Status Choice 3 |
| Global | Project Manager | Prospects and Custome | Prompts | User Defined List - Status Choice 4 | U.D. Status Choice 4 |
| Global | Project Manager | Prospects and Custome | Prompts | User Defined List - Status Choice 5 | U.D. Status Choice 5 |
| Global | Project Manager | Prospects and Custome | Prompts | User Defined List - Status Default Choice | U.D. Status Default |
| Global | Project Manager | Prospects and Custome | Prompts | User Field 1 | U.D. User Field 1 |
| Global | Project Manager | Prospects and Custome | Prompts | User Field 2 | U.D. User Field 2 |

Entering these labels in ALL CAPS, distinguishes them from the system set fields.
The prompts on these fields can be defined and used to track information.
Note these fields do not transfer to the RFMS customer record

### Affiliation

Set the prompt for the affiliation field.

### Prospect & Customer User Defined List

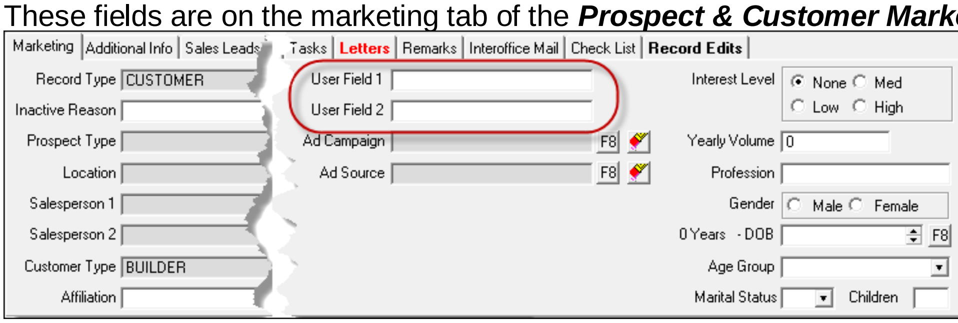
To create a custom checklist for handling sales leads complete the information in this section.

1. Give the list a name. ***In the example: PROSP/CUST TO DO***
2. Give the items in the list a name. ***In the example: PROSP/CUST TASK LIST***
3. Create the items in the list.
*Utilities>Project Manager Set Up>Sales Lead User Defined List Items*
4. Define the choices for the answers or outcomes to these items

***In the example:***
***Yes***
***No***
***Not Applicable***
***Less than 3 Months***
***More than 3 Months***
***To Do***

### User Field 1 & 2

These fields are on the marketing tab of the ***Prospect & Customer Marketing Tab***.



## Reminders & Requests

*X>Utilities>System Options>Project Manager>Reminders and Requests*
*Category Interface*

### *Type- Can be Global, Assigned or User*

| Type | Module | Applies To | Category | Option | Value |
|---|---|---|---|---|---|
| User | Project Manager | Reminders and Requests | Interface | Enable Reminders and Requests | Yes |
| User | Project Manager | Reminders and Requests | Interface | Sound To Play | |
| User | Project Manager | Reminders and Requests | Interface | Play Sound | No |

*Figure: Reminder & Request Options*

**Enabled:** Check this box to enable the Project Manager Module Reminders function. This does not display Outlook Reminders

**Play Reminder Sound:** set this to yes for an audible notification of a reminder.
**Reminder sound:** Browse to search for a .wav file to play for the reminder above.


- PM reminders only display when PM is open.
- Reminders will only display for the Assigned To user or users related to the Assigned To user. A user would be related to the Assigned To user if the user was linked to the same Salesperson or Worker.
- Reminder dates can be entered on records so that when exported to Outlook the outlook reminder function would work, but not have this box checked. This would cause a reminder only in Outlook, not in both software applications

## Sales Leads

*X>Utilities>System Options>Project Manager>Sales Leads*

## Sales Leads-Configuration

| Type | Module | Applies To | Category | Option | Value |
|---|---|---|---|---|---|
| Global | Project Manager | Sales Leads | Configuration | Mark Sales Leads as Lost After # Days | 100 |

### Automatically move Sales Leads to Lost After # of Days (Feature is Inactive if 0)

### *Type- Must be Global*

For a sales lead to be considered lost it will need to be marked on the record or meet the criteria set for a lost lead set here. The Default Setting is 90 days.

## Sales Leads-Default Filters

### *Type- Can be Global, Assigned or User*

| Type | Module | Applies To | Category | Option | Value |
|---|---|---|---|---|---|
| User | Project Manager | Sales Leads | Default Filters | Default Location for Manage Sales Leads | |

### Default Location for Manage Sales Leads

This refers to the location for Sales Floor Manager (Sales Lead). These are not necessarily the same as the store codes. Locations can be added, edited and deleted here as well as choosing the location for this workstation.

For example, for different salespersons for commercial clients and retail clients; the locations could be commercial and retail.

## Sales Leads-Prompts

### *Type- Can be Global, Assigned or User*

| Type | Module | Applies To | Category | Option | Value |
| --- | --- | --- | --- | --- | --- |
| Global | Project Manager | Sales Leads | Prompts | User Defined List - Description | U.D. Description |
| Global | Project Manager | Sales Leads | Prompts | User Defined List - Field Name | U.D. Field Name |
| Global | Project Manager | Sales Leads | Prompts | User Defined List - Status Choice 1 | U.D Status Choice 1 |
| Global | Project Manager | Sales Leads | Prompts | User Defined List - Status Choice 2 | U.D Status Choice 2 |
| Global | Project Manager | Sales Leads | Prompts | User Defined List - Status Choice 3 | U.D Status Choice 3 |
| Global | Project Manager | Sales Leads | Prompts | User Defined List - Status Choice 4 | U.D Status Choice 4 |
| Global | Project Manager | Sales Leads | Prompts | User Defined List - Status Choice 5 | U.D Status Choice 5 |
| Global | Project Manager | Sales Leads | Prompts | User Defined List - Status Default Choice | U.D. Status Default |

*Figure: Sales Lead Prompts*

To create a custom checklist for handling sales leads complete the information in this section.

1. Give the list a name. ***In the example: Lead To-Do***
2. Give the items in the list a name. ***In the example: Lead Task***
3. Create the items in the list.

*Utilities>Project Manager Set Up>Sales Lead User Defined List Items*

4. Define the choices for the answers or outcomes to these items

   ***In the example:***

   ***Yes***

   ***No***

   ***Not Applicable***

   ***Less than 3 Months***

   ***More than 3 Months***

   ***To Do***

## Task Types

*Utilities>Project Manager Set Up>Task Types*

Task types is a user defined list to help with organization of Tasks.

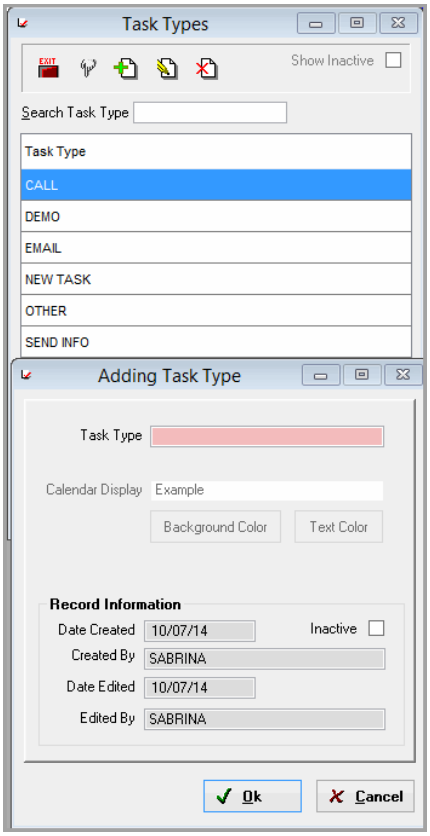



*Figure PM Task Types*

## Web Sales Leads (Integrates with Lead Management System)

*Utilities>System Options>Project Manager>Web Sales Leads Category-Configuration*

| Type | Module | Applies To | Category | Option | Value |
|---|---|---|---|---|---|
| Global | Project Manager | Web Sales Leads | Configuration | Enable Web Sales Leads | No |
| Global | Project Manager | Web Sales Leads | Configuration | Home Phone Mapping | Cell Numbe |
| Global | Project Manager | Web Sales Leads | Configuration | Mobile Phone Mapping | Phone2 |
| Global | Project Manager | Web Sales Leads | Configuration | Work Phone Mapping | Phone3 |

### Enable

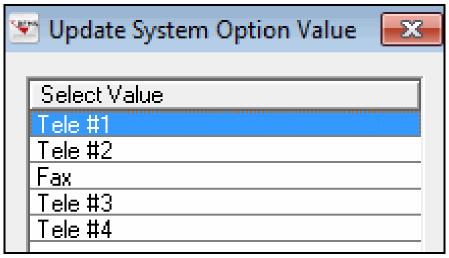
***Type- Can be Global, Assigned or User***

Set this to yes to enable the Web Sales Lead capabilities.

### Phone Mapping

***Type- Must be Global***

Select where phone numbers from web leads will be inserted on the lead record.




## Workbench-Default Filters

*Utilities>System Options>Project Manager>Workbench*

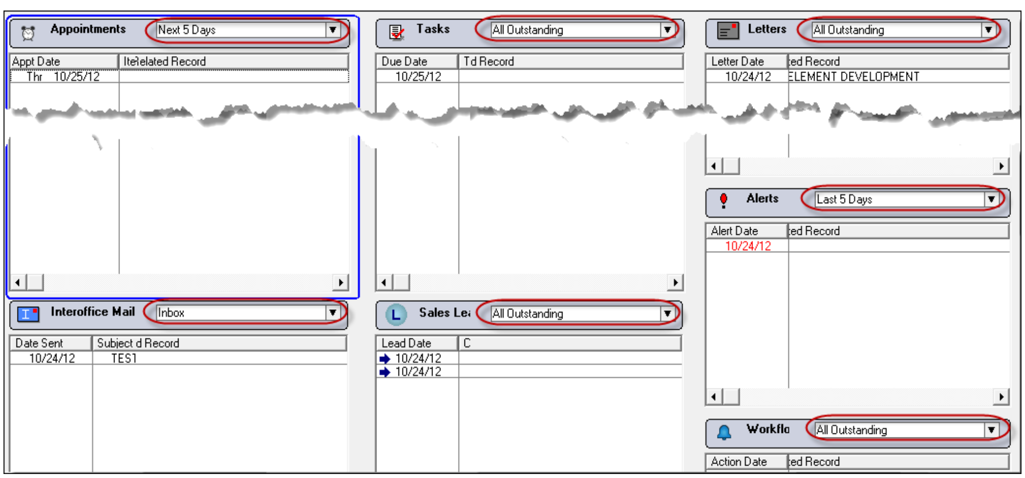
### *Type- Can be Global, Assigned or User*

| Type | Module | Applies To | Category | Option | Value |
|---|---|---|---|---|---|
| User | Project Manager | Workbench | Default Filters | Alerts | All Outstanding |
| User | Project Manager | Workbench | Default Filters | Appointments | All Outstanding |
| User | Project Manager | Workbench | Default Filters | Interoffice Mail | Unread |
| User | Project Manager | Workbench | Default Filters | Letters | All Outstanding |
| User | Project Manager | Workbench | Default Filters | Sales Leads | All Outstanding |
| User | Project Manager | Workbench | Default Filters | Tasks | All Outstanding |
| User | Project Manager | Workbench | Default Filters | Workflow Actions | All Outstanding |

*Figure: Workbench Default Filters*

Choose the default settings for lists on the **Workbench** by clicking change value. Then use tab or the mouse to highlight the choice. The **Workbench** must be closed and reopened for the changes to be applied.

Once on the workbench the list filter can be changed, but will go back to the default settings each time it is reopened.




# Project Manager Set Up

*Project Manager>Utilities>Project Manager Set Up*

Things here are unlimited lists rather than choices to be set.  This makes it necessary to configure in set up rather than options.

Notes: The PM application can be resized so that other open screens on the desktop can be viewed.

---

## Alerts Types

*Utilities>Project Manager Set Up>Alert Types*

Alert types is a user defined list to help with organization of Alerts.

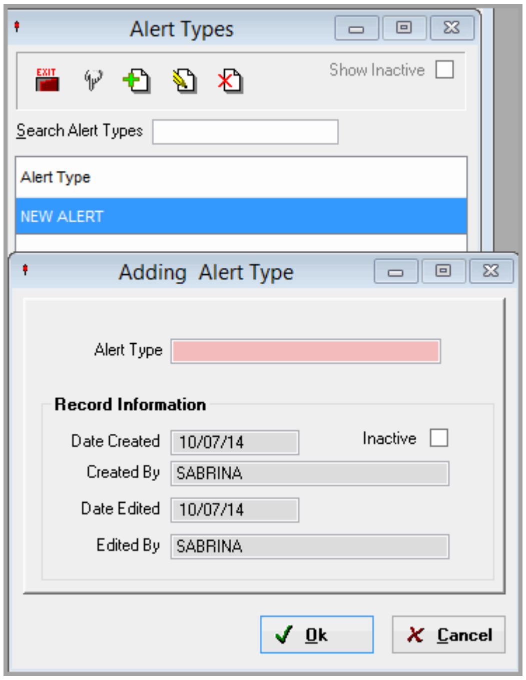



*Figure PM Alert Types*

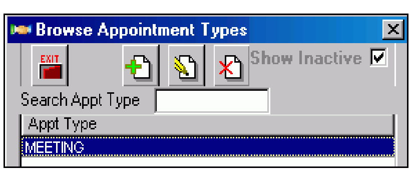
---

## Appointment Types

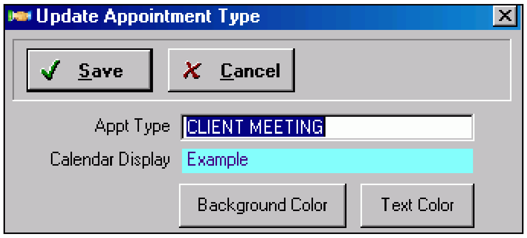
*Utilities>Project Manager Set Up>Appointment Types*

Appointment types can be defined with label, text color and background color.
When creating this list keep in mind, the appointment type can be used to filter appointments on the appointment browse list and the calendar. It shows on the browse list but does not show on the calendar.

Click the insert button to add a new type.
Click the edit button to make changes to a type.
Click the delete button to remove a type.




When adding or editing, the background and text colors can be assigned as well as changing the label.




This will define how that type of appointment shows on the PM calendar.


## Customer Ad Campaigns

*Utilities>Project Manager Set Up>Customer Ad Campaigns*

PM allows adding a list of promotional events for use in prospects and customers. This list is independent of the Ad source Field in RFMS Order Entry. This list will be available when adding a prospect through the SALES LEAD program or through contact management. The same ad campaign cannot be added more than once; for Similar Campaigns add the date to the description ex Spring Sale 10. If an Ad Campaign has been used on a customer record, it should not be deleted, instead make it inactive. One suggestion is to use this field for the specific Ad Campaign and use ad source for the media that let the client know of the Ad campaign.

Tracking this will allow follow up marketing to people who responded to specific promotions and track the number of leads from each promotion.

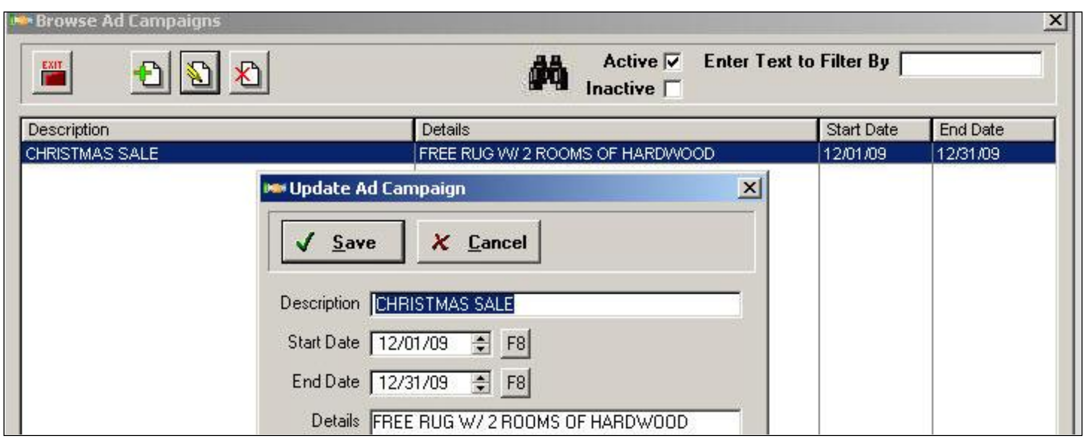



*Figure: Ad Campaign Set up*

A listing of ad sources can also be created in *RFMS>Order Entry>Utilities>Settings>Ad Source,* giving an additional tracking field.

## Customer User Defined List Items

*Utilities>Project Manager Set Up>Customer User Defined List Items*

The checklist allows creating table to track data on customers.  This could be a checklist of steps to follow, or a list of products or conditions with whether or not the customer fits that description. A combination of item type can be used. Parts of this list are set in system options while this is an unlimited list rather than choices to be set.  This makes it necessary to configure in set up rather than options.

1. Give the list a description. (System Options)
2. Give the items in the list a field name. (System Options)
3. Click **Customer User Defined List Items** to create the items in the list.
4. Define the choices for the answers or outcomes to these items. (System Options)

For full details on this feature, click here.

---

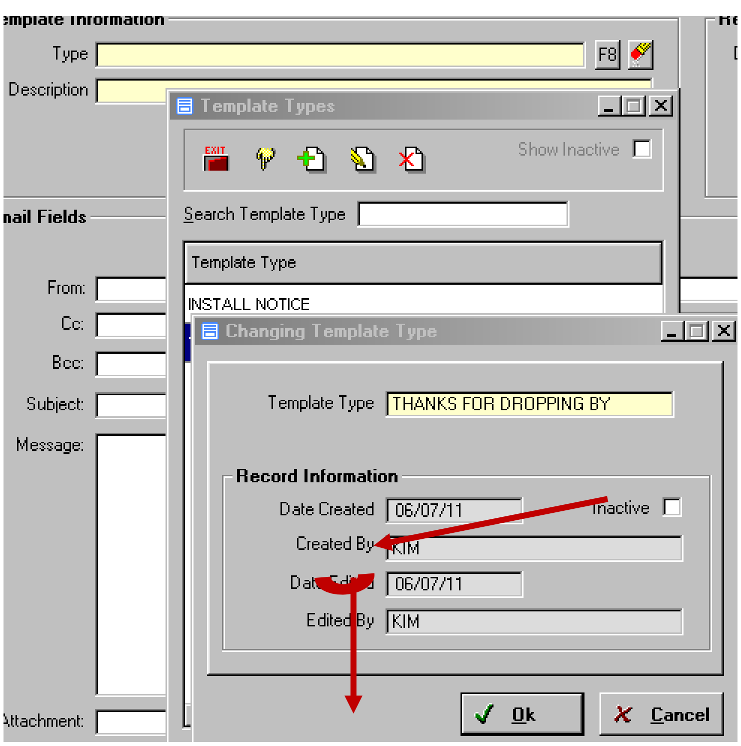
## Email Templates

*Utilities>Project Manager Set Up>Email Templates*

For standard email messages sent on a regular basis. Templates can be used both in RFMS and PM, PM Retail or Commercial is required to create templates.

### Creating or Editing a Template

Click the template button, the Email template browse screen displays.



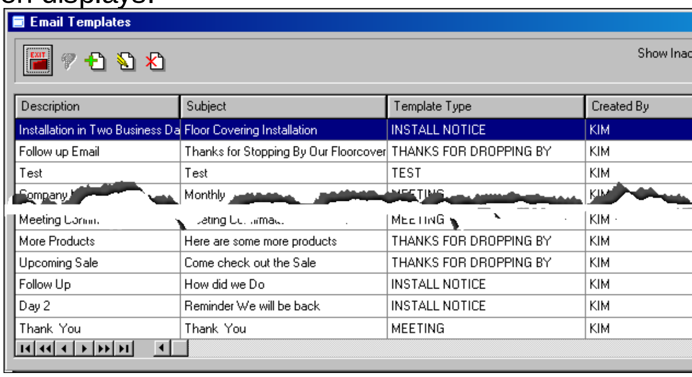



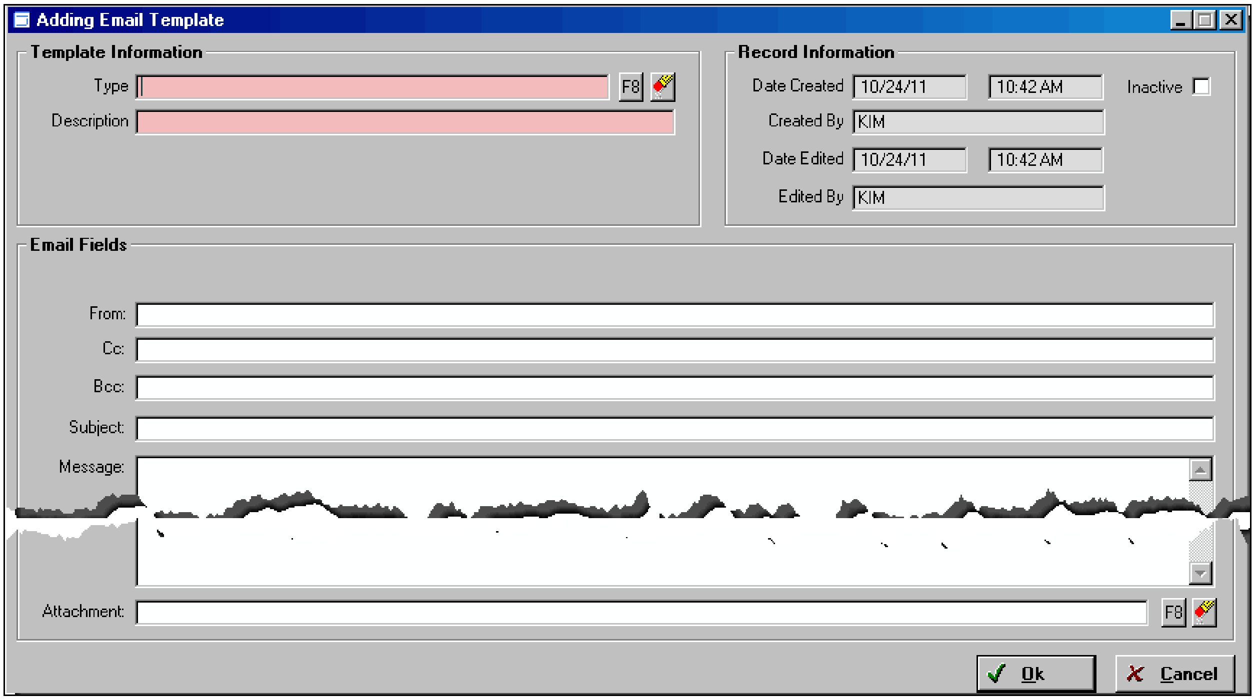

*Figure: Email Template Browse Screen*

Click the insert or edit button. The email template screen displays. The **Template Type** is a required field.  Click **F8** to select or add a type.

From the Template type screen, click the select button to choose a type or add/edit a type.

Next, Type in a description. The **record information** on the template and template type will be automatically generated by the system.

Check the **inactive** box on the template and template type to save for future use, but have it not show on the template pick list when sending emails.




The **signature** and **blind carbon copy** on the email will be pulled from the private "configure email" settings. An additional blind carbon copy can be set for this template.

Type in a **message** to be sent each time the template is used. This message can be edited or added to when emails are sent.

**Subject:** This will be the subject line of each email created using the template.

**Attachment:** The attached file will be sent with each email created using the template.

Templates can be used to send emails to multiple prospects and customers at a time using the **Mass Email Using Template** feature.

## Letter Types

*Utilities>Project Manager Set Up>Letter Types*

The letter types are user defined. The previous list has been kept but can now be changed or deleted unless they are in use by Letters, Letter Templates or Document History. Setting up **Project Report Templates** has been moved from this tab, to the **Projects** Tab.

## Letter Templates

*Utilities>Project Manager Set Up>Letter Templates*

A template can also be creating while adding a letter

*Project Manager>File>Letters or **Letters** button on tool bar click **Save as Template** button.*

Notice when dealing with a template, the letter icon is white. When adding a letter the icon is gray.

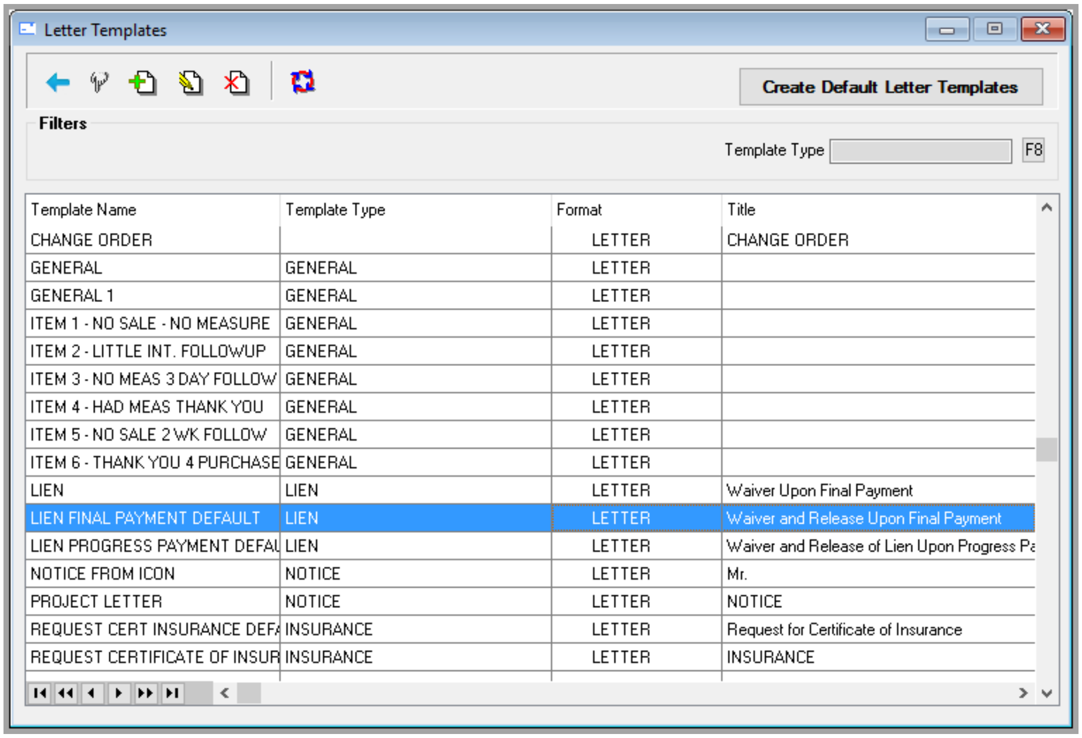



*Figure: Browse Letter Templates*

This will be used to set defaults for specific types of letters. The defaults will be used when creating a new letter but can be edited when printing a specific letter. Letter types are user defined.

Click the edit button to add this information initially or to change it later.

Below shows the Request for Information Screen:

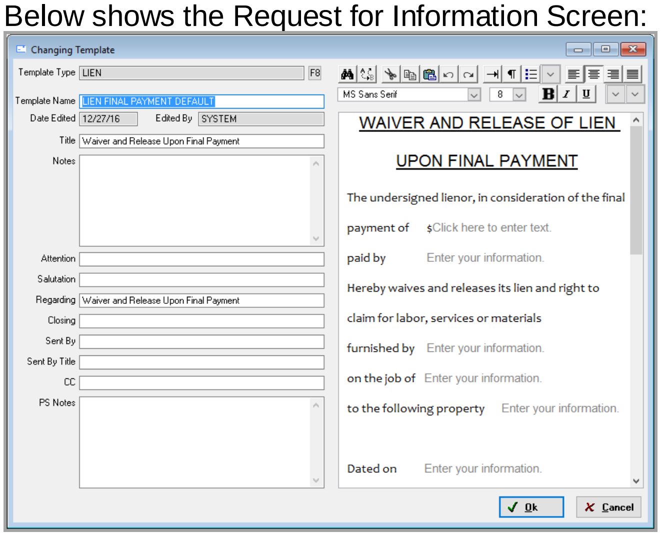



*Figure: Add/Edit Letter Template*

Complete as little or as much of the default information and fill in the rest at the time letters are created.

Notes: The attention, regarding and CC fields do not automatically include the leading indicators of attn, re or cc on the letter so these fields may be used as custom fields.

It is possible to create multiple versions of letters by clicking the Insert button.

1. Choose the Letter Type
2. Template Name: Give it a description. In the example above the Name: Certificate of Insurance specifies the type of Request for Information. Duplicate Template names are not allowed. Then complete the default information for this or letter.

## Location

*Utilities>Project Manager Set Up>Locations*
Click the **insert** button to add a location for the Sales Lead Module

An unlimited number of locations are possible. Once a salesperson is tied to a location, the location cannot be deleted. These locations are not necessarily the RFMS Store listings. In RFMS core a store usually refers to a profit center whereas this would be a physical location or group of people. There is a system option for the default location for a certain workstation.

## Project Status

*Utilities>Project Manager Set Up>Project Status*

This information is used in the Project data and can be defined as needed. An example list is included. If a project status has been used on a project record, do not delete it but instead make it inactive.

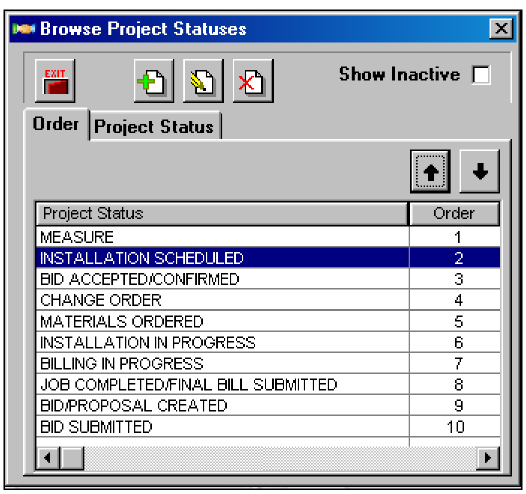



*Figure: Browse Project Status*

The order of the status list can be changed. To change the order of the statuses, highlight the status to move then click on the up or down arrow until it is in the desired position.

Statuses entered prior to Version 10.5.5 will all default to being number 1. Our suggestion is to write the status list in the desired order. Then starting with item last on the list, down arrow until its number corresponds to the highest number. Then do the same with the next to the last item.

## Project Types

*Utilities>Project Manager Set Up>Prospect Types*

A project can be a group of any related records. Since this is the case, more than one kind of project is possible. In Set Up, the list of project types for use in the project area is user definable. Types are listed alphabetically.

Click the insert button to add a new type.
Click the edit button to make changes to a type.
Click the delete button to remove a type.

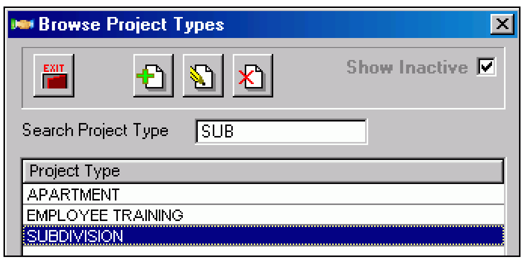



*Figure: Sample Project Types*

## Project Report Templates

*Utilities>Project Manager Set Up>Project Report Templates*

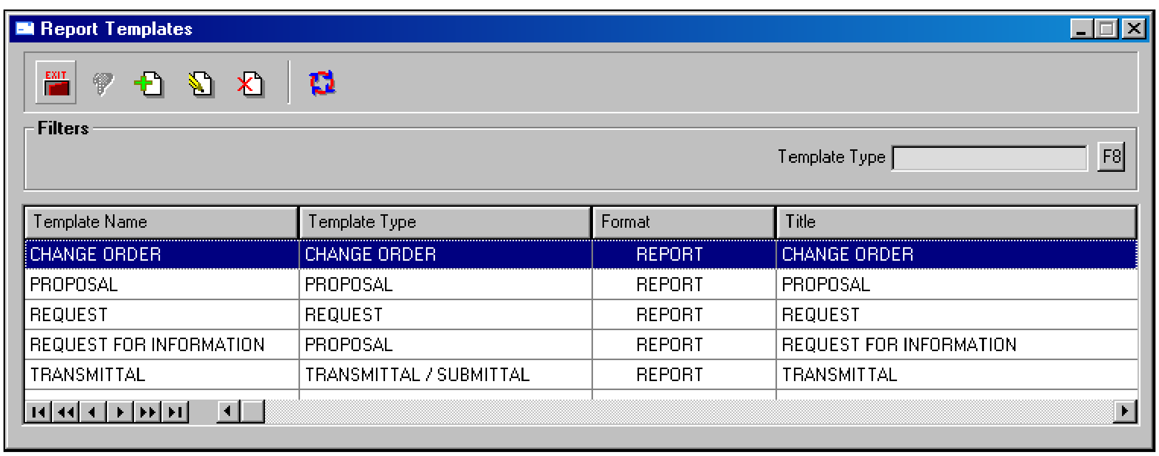



*Figure: Report Template Browse Screen*

This will be used to set defaults for specific types of project reports. The defaults will be used when creating a new report but can be edited when printing a specific report. There multiple predefined report types: PROPOSAL, REQUEST, CHANGE ORDER, TRANSMITTAL / SUBMITTAL.

Click the edit button to add this information initially or to change it later. Below shows the Request for Information Default Screen:

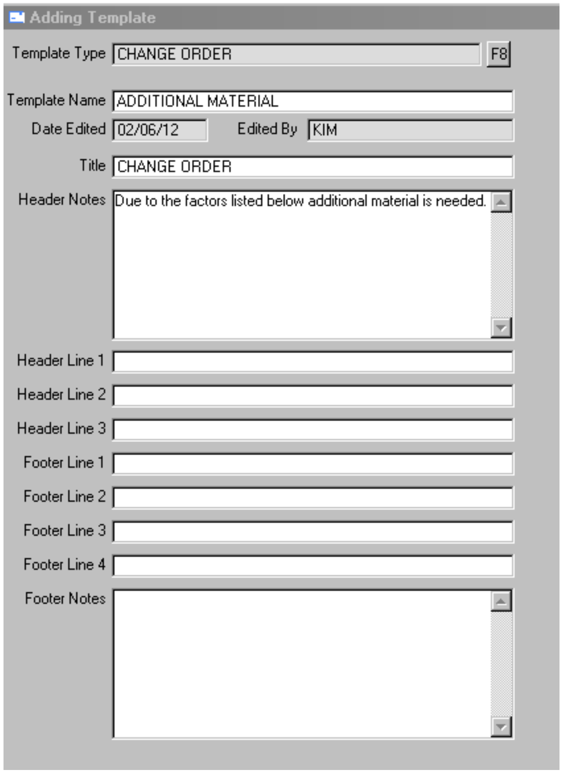



*Figure: Adding a Report Template*

Complete as little or as much of the default information and fill in the rest at the time letters are created.

It is possible to create multiple versions of reports and letters by clicking the Insert button.

1. Use F8 to choose the Report Type. This is required.
2. Use the Template name to give it a description. In the example above the Template Name Additional Material specifies the type of Change Order. Duplicate Names are not allowed. Then complete the rest of the default information for this report or letter. Name is also required.
3. In reports after choosing the type, in this case Change Order, choose the report name.

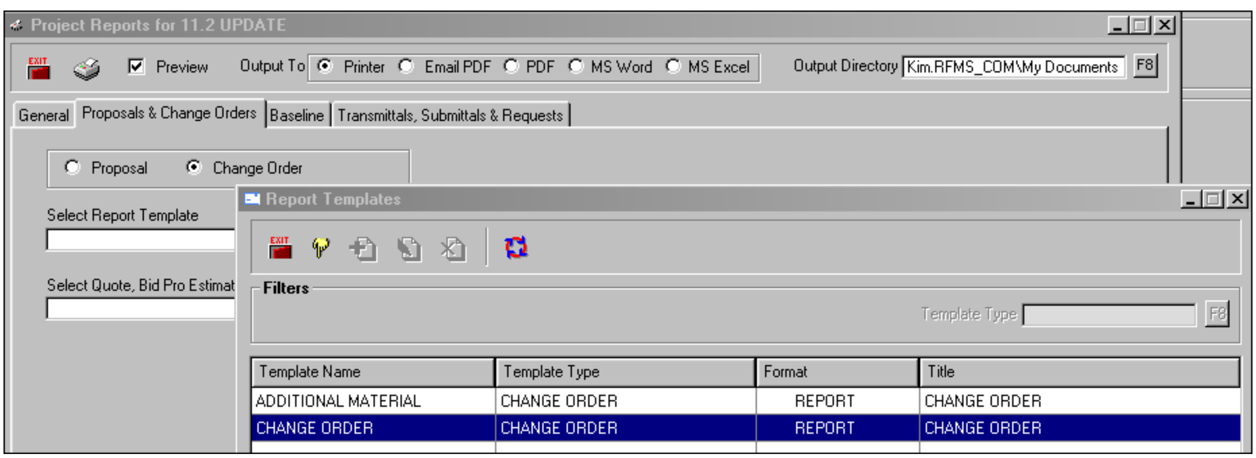


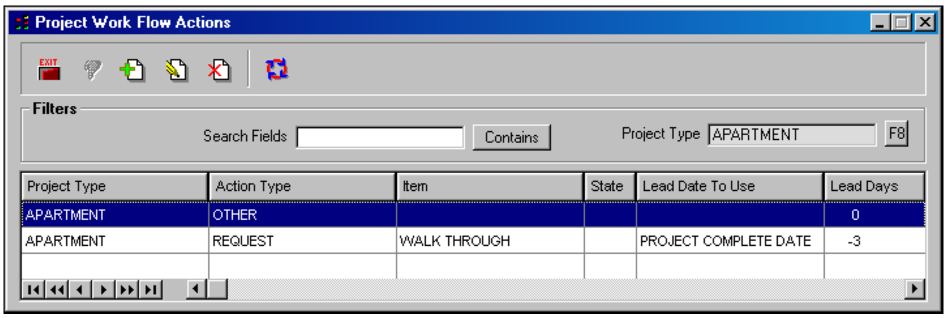

*Figure: Choosing a Report Template*

## Project Workflow Actions

*Utilities>Project Manager Set Up>Project Workflow Actions*

The name of this feature has been changed to more accurately reflect its purpose. Workflow actions do more than just "remind" the user, they actually drive a project's workflow by specifying when certain actions should take place. Prior to version 11.2, project workflow actions told the actions which needed to be done, but these actions records had to be manually created. Now actionable items can be created directly from project workflow actions.

This is where actions which will apply to a type of project rather than just a specific project can be set up. Actions are set for a project type then inherited each time a project of that type is added.




Click the insert button to create a new action.

## Adding or Editing a General Action

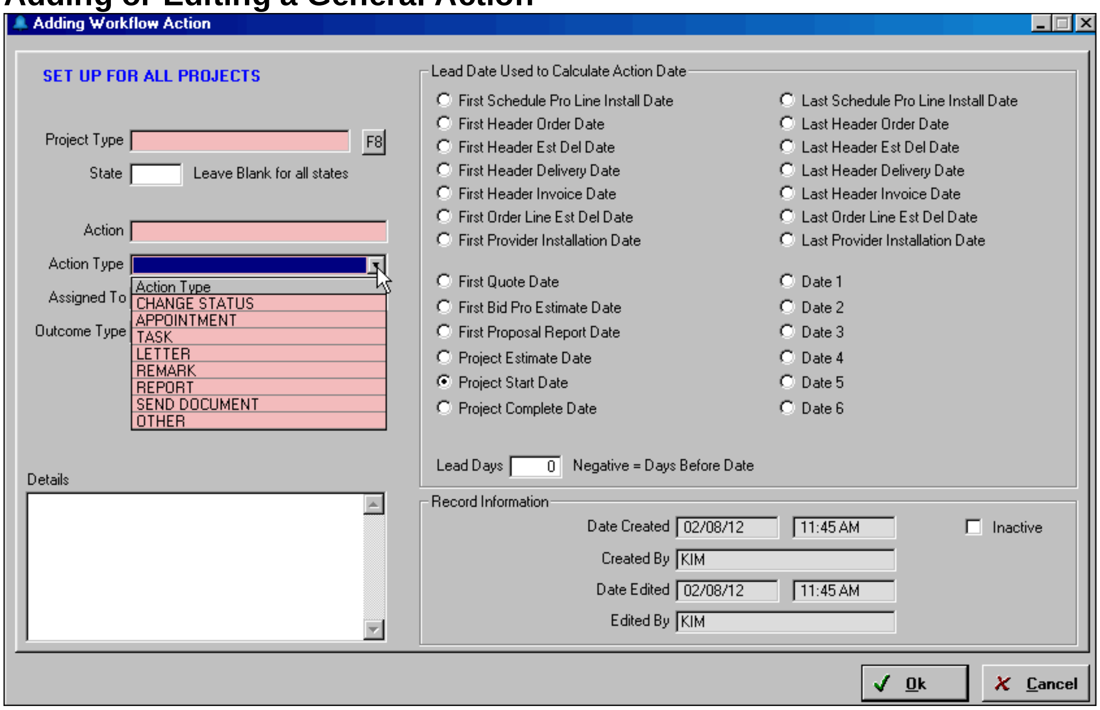



*Figure: Project Workflow Action Set up Screen*

Project Workflow Action Set Up Record Field Definitions:

Choose a **project type** by clicking **F8** and selecting from the drop down list. If the same action is used for multiple project types it must be set up for each project type.

Enter a single **state** or leave blank for all states. Workflow Action will only be generated for Projects where the Primary Customer State matches.

**Action** – Enter a description of action to be taken. This is a required field, it will display on the Work Flow Action Browse list.

**Action Type** - In addition to generating a Workflow Action record, certain Action Types also do additional actions when the Workflow Action record is marked Completed.

> Change Status - Project Status Changed
> Appointment - Creates Appointment; an Appointment Type is also required.
> Task - Creates Task; a Task Type is also required.
> Letter - Creates Letter; a Letter Type is required and Letter Template can also be entered.
> Remark - Creates Remark; a Remark Type is also required.
> Report - Print Project Report; a Report Type is also required and Report Template can also be entered.
> Send Document - Creates Project Document History for PDF and can be emailed; a pdf file can be attached
> Other - No Additional Actions

**Assigned To** - This Workflow Action Assigned to field will default to this selection. For Projects the choices are Project Salesperson, Project Manager, and Project Created By. If assigned to Project Salesperson or Project Manager and none is listed on the project, the assigned to will be **"to be assigned"**.

**Outcome Type-** Different Action Types will require information here. For example, if the Action Type is Task, a task type will be required here.

**Details** - Populates the corresponding Details field on the created record.

**Automatically Create Task on Action Date –** Checking this box means that **on the action date** the workflow action will automatically convert from a workflow action with a date based on a lead date that could change to a specific action with a specific date. Until the action date, the record remains a workflow action. This applies to Action Types APPOINTMENT, TASK, LETTER, REMARK and CHANGE STATUS.

Example: For Tasks, this would mean that the Task record would be created and the Workflow Action would be marked completed on the action date.

If a Workflow Action is set to Automatically Do the Outcome on Action Date, then the Assigned to Status for the Outcome record will be set to ***Requested.*** This will prevent the assigned person from missing the record.

**Select Date or Event to Use to Calculate Action Date-** More date options have been added including the user defined dates.

**Events** have been added as an option for creating actions. These include every new quote, every new bid or every new order added to a project. For example with every new Bid Pro Estimate added to a project a task to make a call to confirm the receipt of the estimate could be added.

**Inactive -** Marking this Inactive will delete existing Outstanding Workflow Action records on projects but will not delete Completed ones. Workflow Action records will no longer be generated for this Workflow Action Set Up record.

A reminder will automatically be created for the workflow action for 8:00 AM on the action date. This will cause the workflow action to display on the **Reminders and Requests Screen** if it is Outstanding, Assigned to the User and has an active reminder. Workflow actions are no longer separate reminders.

### Project Work Flow Actions Browse Screen

Actions for all projects can be viewed from *Project Manager Module>File>Project Workflow Actions or Project Work Flow Actions button on tool bar.*

Actions for a specific project can be viewed from *Projects>Select Project>Project Work Flow Actions button.*

---

### Prospect Types

*Utilities>Project Manager Set Up>Prospect Types*

Prospect types can be added and defined here. This information can then be added to each prospect or customer. If a prospect type has been used on a prospect record, it should not be deleted, instead make it inactive. This field is available on the Prospects & Customers reports.

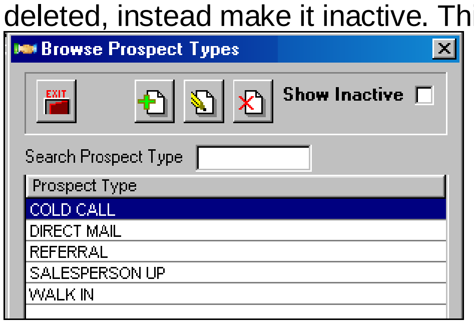
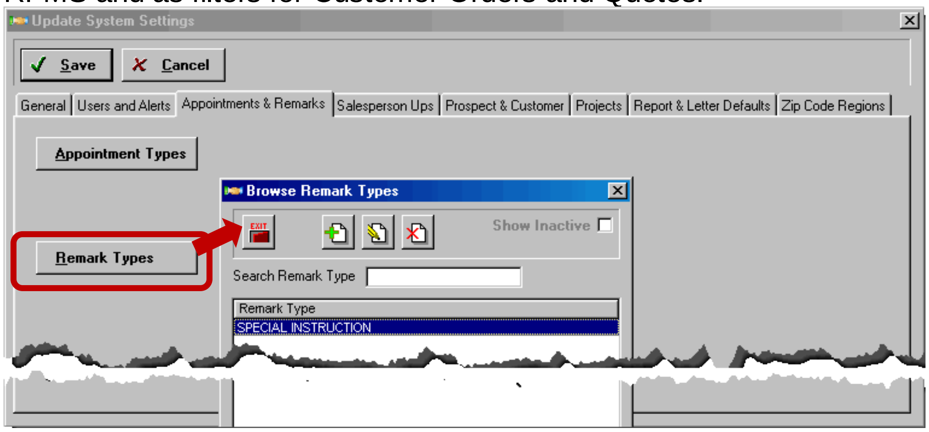



*Figure: Browse Prospect Types*

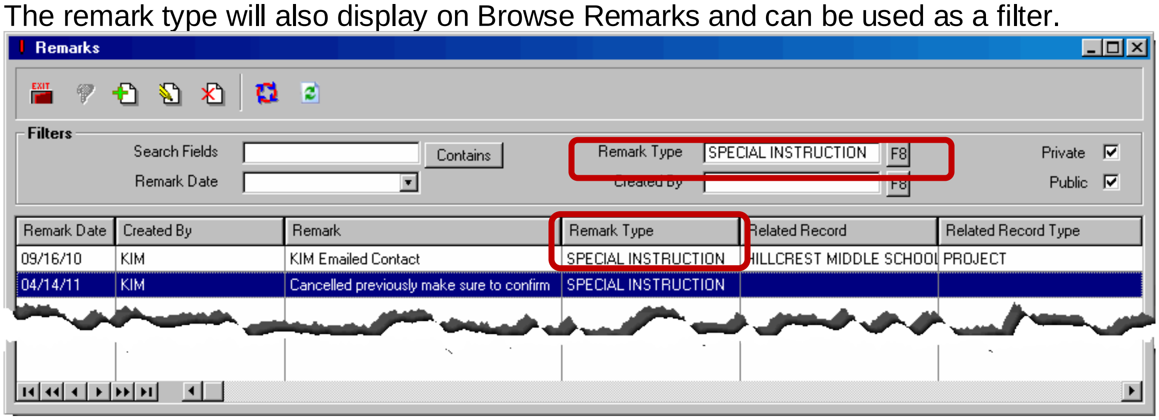
## Remark Types

*Utilities>Project Manager Set Up>Remark Types*

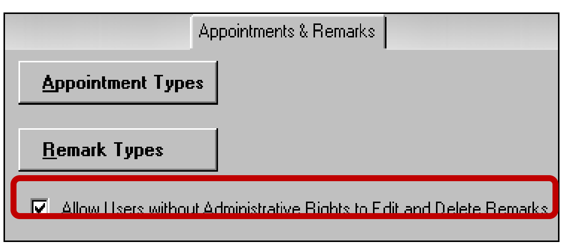
These remark types are available on the A/R Report, A/R Collections and Ageing Reports in RFMS and as filters for Customer Orders and Quotes.



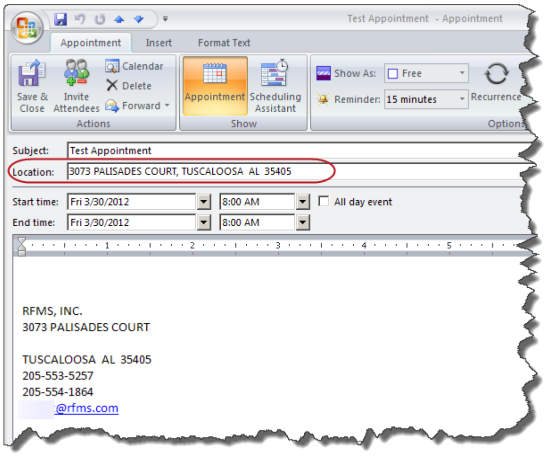

The remark type will also display on Browse Remarks and can be used as a filter.




By default Remarks cannot be edited and cannot be deleted. Although the Remark cannot be edited or deleted it can still be marked Inactive or Use as Template in Project Manager. This can be changed by checking the **Allow users without administrative rights to edit and delete remarks** box. Users with Administrative rights will be able to edit and delete Remarks regardless of this setting.



The company address from the appointment related record is now going to populate the location field in outlook.




## Sales Leads Types

*Utilities>Project Manager Set Up>Sales Lead Types*

This information can then be added to each prospect or customer. If a sales lead type has been used on a record, it should not be deleted, instead make it inactive. This field is available on the Prospects & Customers reports.

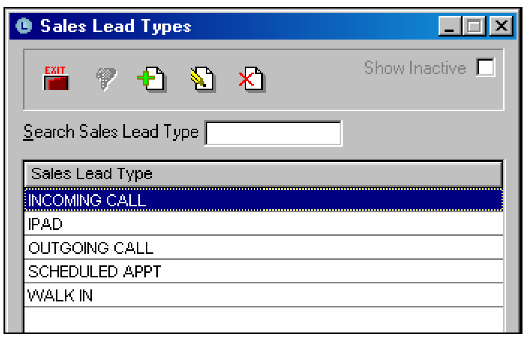



*Figure: Sales Lead Types List*

## Sales Lead User Defined List Items

*Utilities>Project Manager Set Up>Sales Lead User Defined List Items*

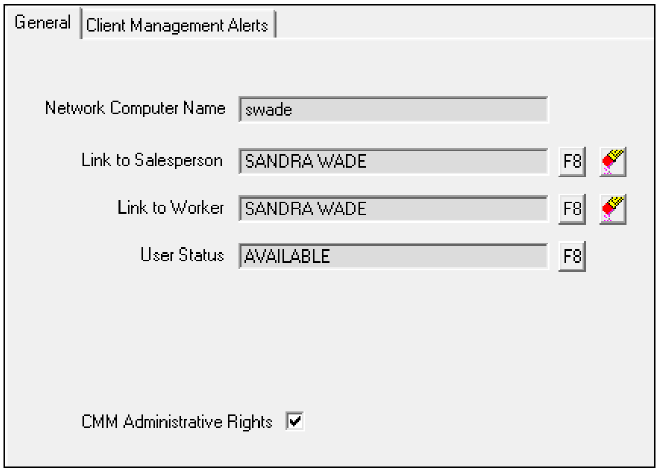
To create a custom checklist for handling sales leads complete the information in this section.

1. Give the list a description. (System Options)
2. Give the items in the list a field name. (System Options)
3. Click the **Sales Leads Items** button to create the items in the list.
4. Define the choices for the answers or outcomes to these items. (System Options)

For a more detailed description of this feature, click here.

## Users

*Utilities>Project Manager Set Up> Users*




This screen allows associating either a Salesman or a Worker or both to a screen name. This is because the screen name comes from the user's log in name, but the alerts are tied to the record from either the RFMS Salesperson file or RFMS worker file. This screen also allows specifying which system events send an alert. This is a public screen so all users can be set up here.

Type the first letter of the user name and then scroll to the exact user name. Click on the Pencil to edit the existing information. Users that come from the RFMS list which won't be used in PM can be deleted. User Status will tie to the SALES LEAD system as a notification of a user's current status. A pick list is provided for the user status. See Changing User Status, for directions on changing this status more quickly.

Checking the Administrative Rights box will allow that user to be able to view all public and private records and will be able to change the viewing rights of any record. If this user is linked to other network computers they will have administrative rights no matter which computer they use. See System Options to temporarily choose whether or not to see everyone's records.


Notes: It is highly recommended that the edit button on the Set Up, User Settings and **alerts** tab be password protected because of this change.

### Linking Multiple Computers to One User

For those who use more than one computer, each of those Computer User names can be linked to one PM identity.

In the example below Mike uses both the computers named Mikec and Plasma. By entering the same Salesperson and Worker Name for both these Network Computer names they have been linked together.

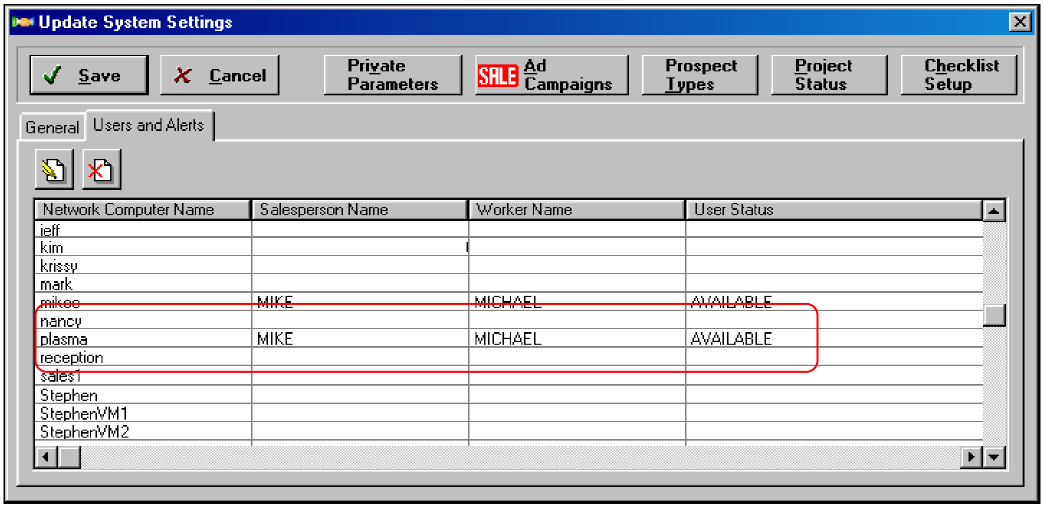
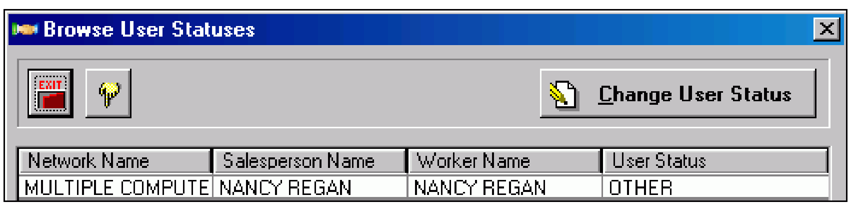



*Figure: Users and Alerts Tab*

Viewing Rights - An internal list of user names is created for the current user comprising of all their Network Names, Salesperson Names and Worker Names for all of their linked computers. So that the private records will be the same no matter which computer is used.

On the Browse user screen, this will show as network name-Multiple Computers. This screen replaces the select user drop down list, which displayed only the single user names requiring choosing between the names if a user had multiple computer log ins.




When Mike was linked to the second computer the messages below notified us that when either of these machines logs in Mike will be the salesperson.


## Zip Code Regions

*Utilities>Project Manager Set Up>Zip Code Regions*

Prospects & Customers can be filtered by a user defined region. Define the region name, and then add the zip codes separated by a comma.  Region filtering will only look at first 5 digits of the prospect/customer zip code.

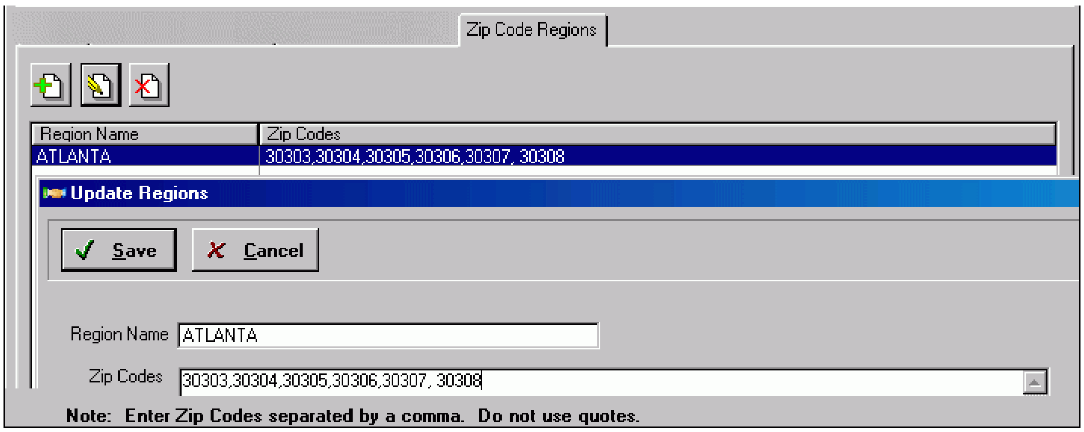
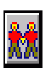



*Figure: Zip Code Region*

# View User Status

*Project Manager>Utilities>Users*



This screen allows changing user status.
Highlight the user to change, and then click the **Change User Status** Button. This brings up a box allowing a new user status to be chosen. This browse box is sorted by the network user name.

# Import

*Project Manager>Utilities>Import*

Importing data to Project Manager
Data can be imported from other software via a .csv or .xls file.

As of version 11.2 The Import into Prospect and Customer now allows bringing in Yearly Volume, Profession, Marital Status (M or S), Children (number of children) and Gender (M or F).

## Prepping an Excel document for import

**Notes:**

1. Important Note: When importing email addresses, hyperlinks cannot be imported. To remove the hyperlinks use the following technique:
   i. Type the number 1 in a blank cell, and right-click the cell.
   ii. Click Copy on the shortcut menu.
   iii. While pressing CTRL, select all the cells with the hyperlink.
   iv. Click Paste Special on the Edit menu.
   v. Under Operation, click multiply and then click OK.
   vi. Note: This will put a 0 in blank cells, use find/replace to fix.

2. If the excel document has data in 2 fields for the customer name (first name and last name) the data will need to be merged together before it can be brought into the customer name field in RFMS. This is one way to do this in excel.

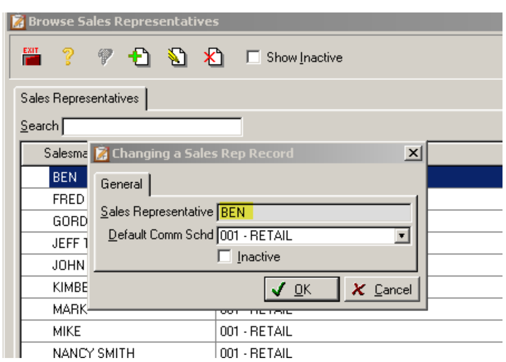
3. Use a formula to merge the data from 2 fields together into one field. The formula is: =A2 &', '& A1. Find more information on this in excel, searching on combine data from 2 cells.

4. Make sure there are not empty formatted cells off to the right or below the desired data.
   i. Select just the cells to import.
   ii. Copy and paste into a new excel document.

5. Clear Formats – Select entire grid and do Edit/Clear/Formats

6. Formatting - Select entire grid and use Format/Cells to set the following.
   i. Number Format = Text
   ii. Wrap Text = No
   iii. Horizontal Layout = Left

7. Salesperson – to bring in a salesperson with the data enter a column for this information in the spreadsheet. Make sure the name matches exactly to the salesperson name from RFMS by going to *RFMS>Order Entry>Utilities>Set Up>Sales Representatives.* Copy and paste the name from the file.



First import the information to a preview screen. Click he button and then find the file for import. Make sure the file is closed while it is being imported then double click on the file to select it. Depending on the size of the data, this may take a while. Click Ok to start the process.


*Figure: Import File*

The result will be a preview of the data.

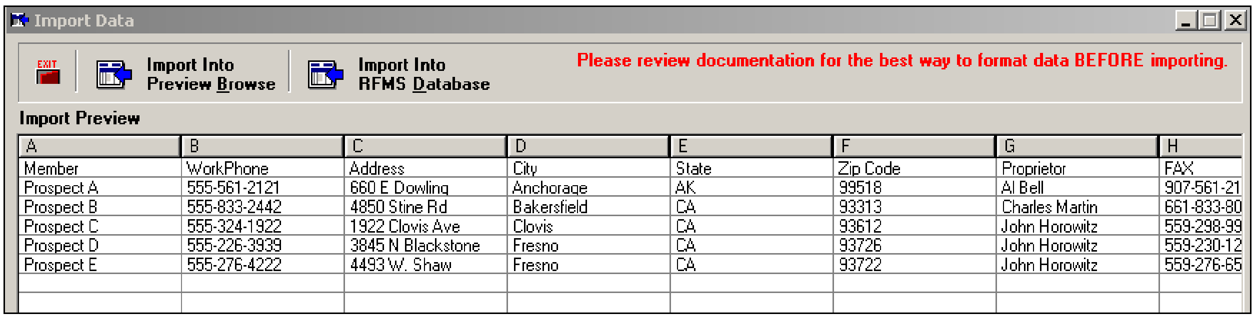
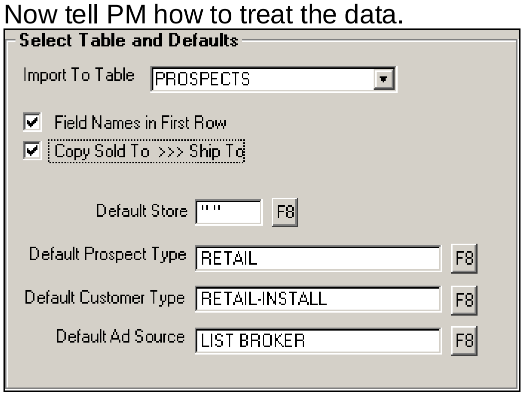



*Figure: Import Preview Screen*

Now tell PM how to treat the data.




**Import to Table**: currently only Prospects are allowed.

**Field Names in First Row:** Check this if the first row of the data has column headings like the one above.

**Copy Sold To >>>Ship To:** Check this to have both addresses the same

The entire list will be added to the **default store** chosen.

Choose the value for **Prospect Type; Customer Type** (this is a required field) and **Ad Source.**

PM uses the Customer Type and Sold to Name to look for duplicate records.  A duplicate record will be added to the list with a number at the end of the name. (Example Construction Company, Construction Company 1)

Now match the records in the data (shown as Column) to the fields in PM (shown as field).

In the Map Fields section, highlight the column in the data, then double click to bring up the list of Prospect fields.

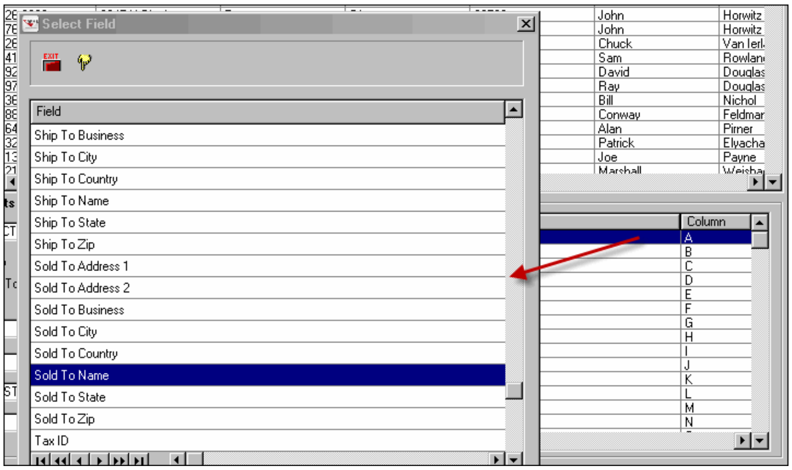
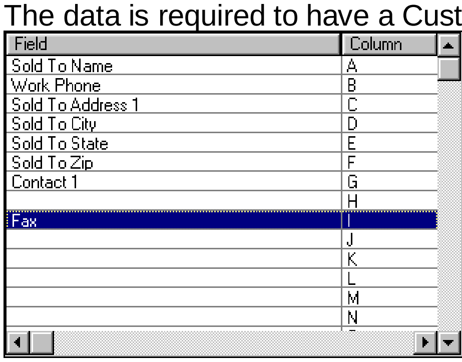



*Figure: Mapping Data to Fields*

Column A (Name) can be put into Sold to Name so double click on sold to name or click the select button. Next Colum B in the data is work phone, so double click with column B highlighted and find the work phone field and select it. Skip a column to not map it to a field.

The data is required to have a Customer Type and a Sold to Name.



| Field | Column |
|---|---|
| Sold To Name | A |
| Work Phone | B |
| Sold To Address 1 | C |
| Sold To City | D |
| Sold To State | E |
| Sold To Zip | F |
| Contact 1 | G |
| | H |
| Fax | I |
| | J |
| | K |
| | L |
| | M |
| | N |

*Figure:  Example Mapped Fields*

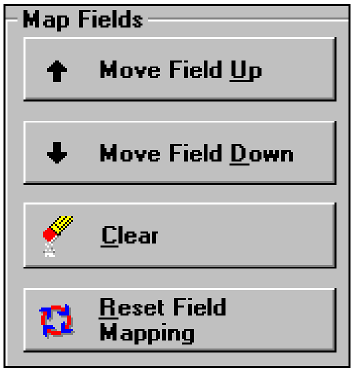
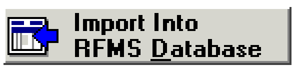



*Figure: Map Fields Options*

In case a field was mapped incorrectly, there are options for changing the mapping. For example, if fax was accidently mapped to column I instead of J, simply highlight the row and click **Move Field Down.** To remove the field name, click **Clear**. To remove all the field names, click **Reset Field Mapping**.



When ready, click the import data button. Depending again on the size of the list this may take a while. When it is completed, a message will be displayed indicating the import was successful.

## Calculator

This functions the same in all RFMS Modules, click here for details.

## Calendar

This functions the same in all RFMS Modules, click here for details.

## Reset Windows Position

This functions the same in all RFMS Modules, click here for details.

# Project Manager Remote Actions

Remote action is the way to connect records and activities in other parts of RFMS with the Project Manager Module.

The PM button  in any RFMS Menu allows access to the PM Remote Actions Screen for any highlighted record. This button can be password protected. If the button appears as above no PM information has yet been created. Clicking on the button, allows the highlighted record to be added to a project, have an alert, appointment, task, or remark added or letter can be related to it.

Notes:

- Remote Actions such as adding tasks do not sync with outlook. This can only be done inside the Project Manager Main Application.
- Reminders only work if the Project Manager Main Application is open.
- Opening remote actions does not count against the Project Manager user count

- The following actions are not available in the Remote Actions update screens:
    1. Selecting or Viewing a Related Record.
    2. Adding additional Tasks, Appointments or Remarks for the Related Record.

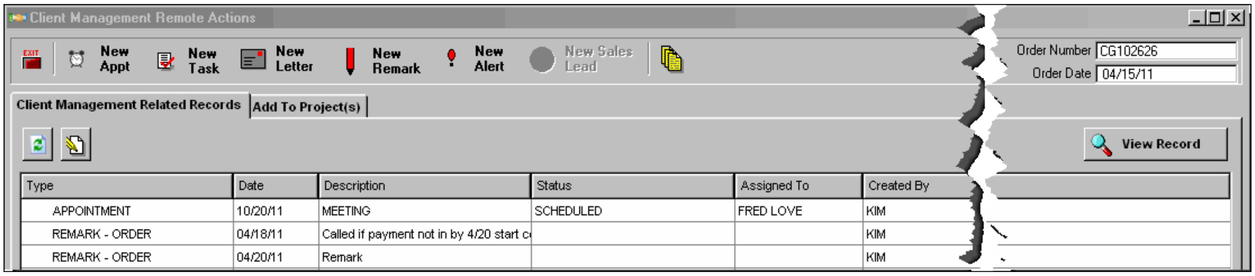
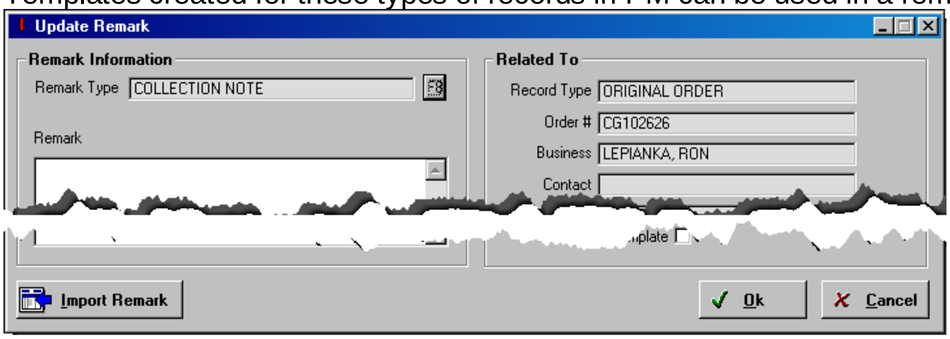
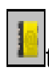



*Figure: PM Record viewed from BCOE*

Templates created for these types of records in PM can be used in a remote action.




When it is highlighted in yellow, there is already activity or a record associated in PM with the highlighted record. For these records related PM records can also be viewed and edited. If an item is private it will show for the record creator and if different, the person it is assigned to and the administrator on the view related screen. Records can be edited from the **remote actions** screens. Highlight the record to edit from the View Related Records Tab, and then click the edit button.

When adding a remark via RFMS in BCOE or a Quote, it can be added to the selected order, selected customer or both. Adding to both will require clicking the add remark button twice.


*Figure: Remark to Order or Customer?*

When adding an order to a project that belongs to a billing group to a project, a message will display asking if all related billing group orders would also be added to the project.

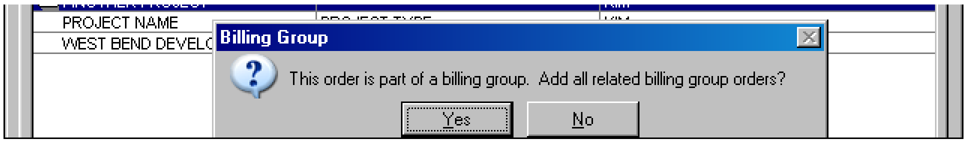
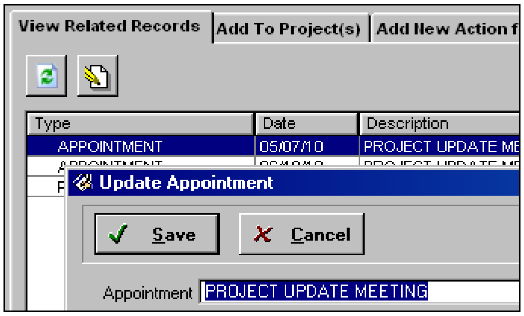
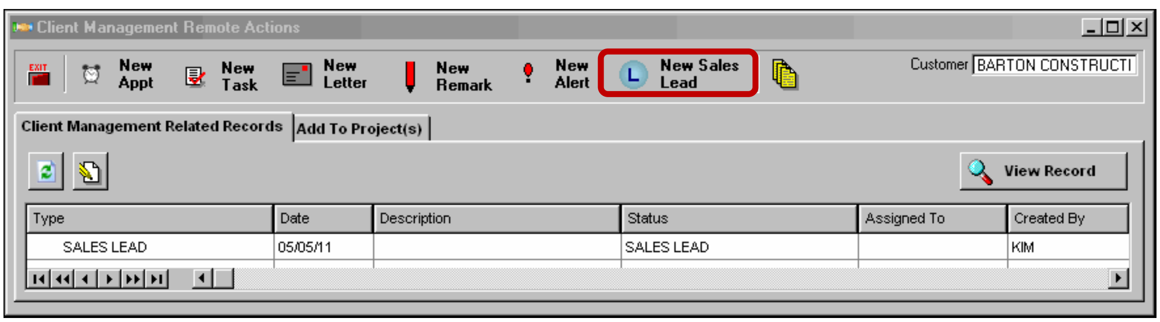



Figure: Remote Actions/ Add to Project Screen




For Orders, Quotes and Estimates, View Related Records will also show remarks and alerts for the customer.

| Type | Date |
|---|---|
| REMARK - ORDER | 06/25/10 |
| REMARK - CUSTOMER | 05/14/09 |




From the Remote Actions screen, a sales lead record can be viewed or edited.

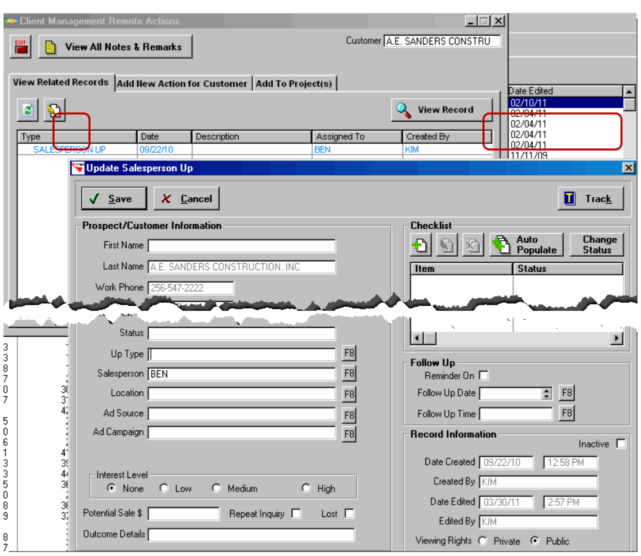



Figure: Sales Lead viewed PM Remote Actions.

View Related Records now has color coding and a status column.

Inactive - Gray

Completed - Blue (Status = Order)

High Priority – Red Arrow

Red (Follow Up = True and Date is Today or Past Due)

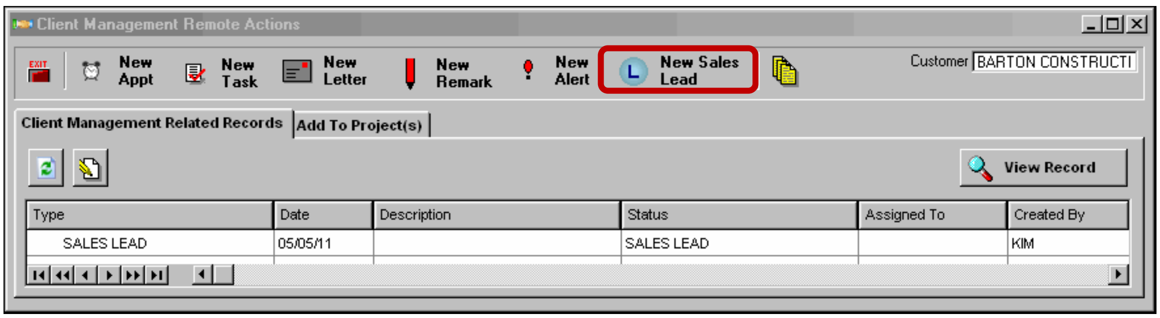
Lost - Green

## PM Integration

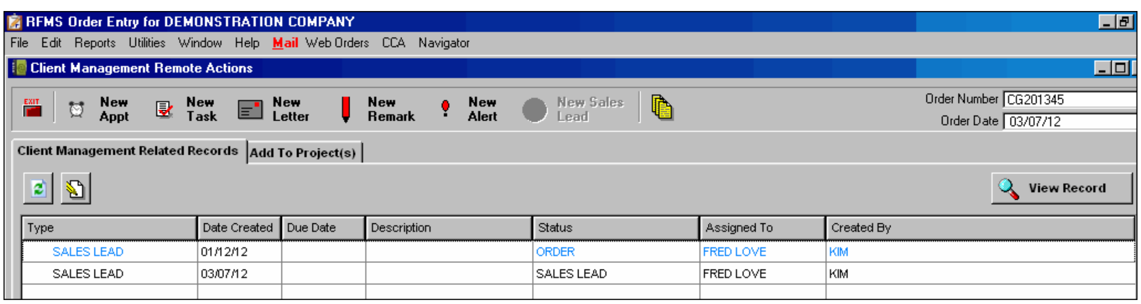
### RFMS

A sales lead can now be entered from a customer record.

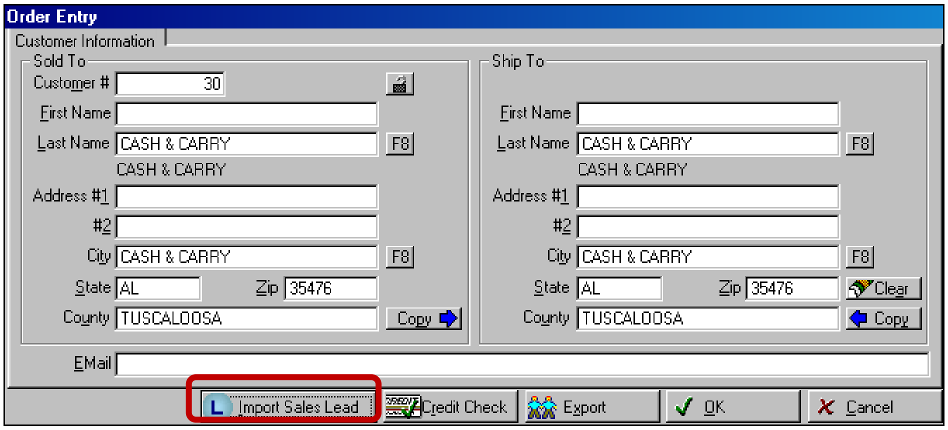
*Order Entry>Customers>PM Remote Actions>New Sales Lead Button or*
*Order Entry>Customers>Edit>Project Manager> New Sales Lead Button*




If an item is related to a *Sales Lead* record then the most recent *Sales Lead* record can be viewed. For example, an order is related to a lead created on 1/12/12, when a new sales lead is created for the same record on 3/7/12 that lead is also shown on the order.




Sales leads can now be imported into a quote or order. This will change the status of the lead and create a tracking record the next time the **Browse Sales Lead** screen is opened. For this to be available the system option Customers from Customer File only cannot be set to yes.



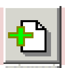
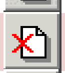
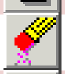
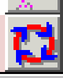

## Viewing RFMS Information

Anywhere costs would be shown in PM, they will not show if the System Option "Show Costs" system option is set to no.

## Using PM with Sales Pro Mobile

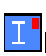
When a quote is entered in Sales Pro Mobile and exported to RFMS quotes a sales lead is created in PM, so it is not necessary or desired to enter the lead first into PM. PM General Record Fields

**Every record (Contact/Task/Letter etc.) created in PM will have the basic options and format as below.**

| | |
|---|---|
| | **PM Commonly Used Buttons** |
|  | Enter a new record. |
|  | Edit a record. |
|  | Deletes the record. |
|  | Clears a field. |
|  | Resets the filter. |
|  | Cancel the current procedure. Could be shown without the word cancel. |

## Hot Keys

Hitting the combination of ALT + the underlined letter is the same as clicking on the button

In this example hit Alt+M to access Interoffice Mail.

Hitting enter on a highlighted record in a list will open the add/edit screen.

Inactive and completed records on a list will be shown in gray.

Many of the record types in PM have the same basic information as shown on the example appointment screen.

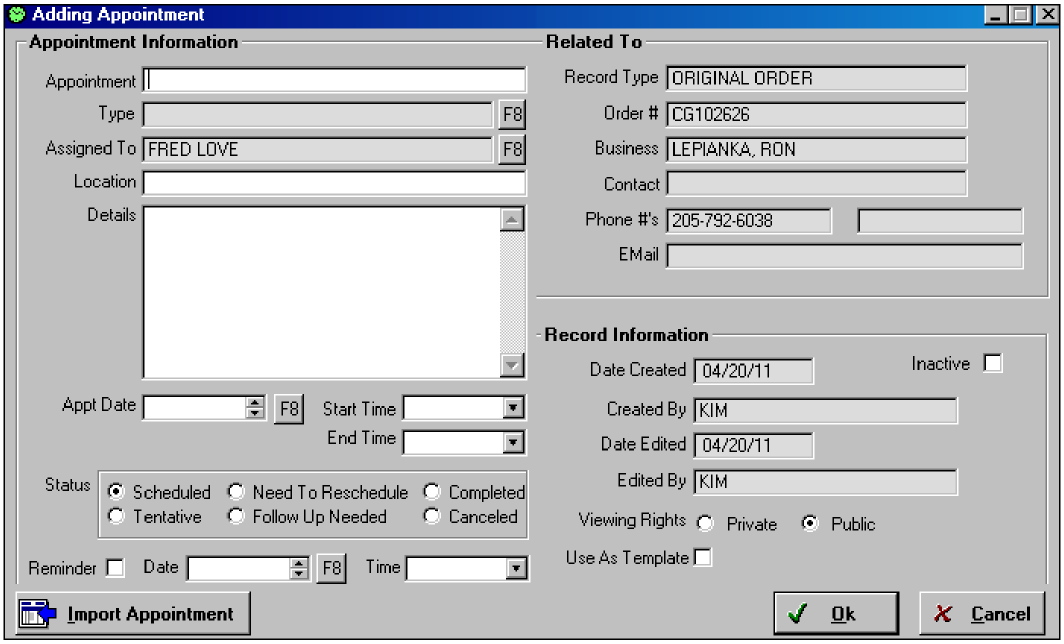


*Figure: General PM Record*

**Import:** Allows using a template record to pre-fill many of the fields.
**Appointment**: The first field allows typing in a general description of the record.
**Assigned to:** Clicking **F8** pulls from the Browse Users list to allow assignment to any user.

When a task is assigned to another user it becomes private to both the assigned and assignee.

When assigning a record to a user and the browse users box displays, the current user will be indicated with a green check mark.

**Details**: Type in a more detailed description

**Location:** This field is only for appointments

**Related To** This option allows connecting data throughout the system. For example a call may be related to a particular customer. Pressing F8 here brings up the **Browse all** screen. See more details on this under the description of the Search All Function.

The ability to add appointments, tasks and remarks from the following update screens has been added. This will add a new appointment/task/remark for the Related To record. The update task screen has been used as an example. Clicking the add task button will bring up the add task screen with the same related record.

Update Appointment
Update Task
Update Remark
Update Salesperson Up

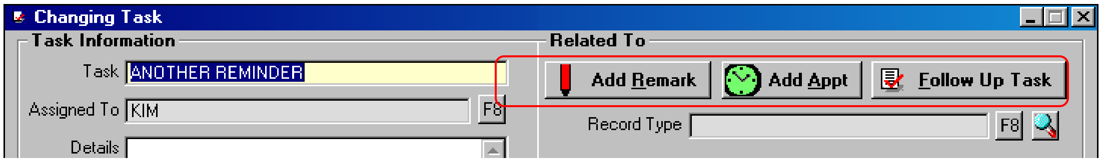
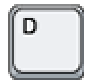


*Figure: Update Task screen as an example*

**Date:** Here, as with all **date** fields in RFMS, hit the 

key to fill in today's date, type in a date, use the up and down arrows to move the date on day at a time or hit 

to bring up a calendar and then choose the date.

Much of the **Record Information** is automatically updated by the software:
Date/Time Created
Created By
Date/Time Edited
Edited by

Check to make a record **inactive.**

Choose the **Viewing Rights** as either **Private** or **Public**. If a job is marked Private, it will now be private not only to the "Created By" user. It includes the user that the item is assigned to, as follows:
Moisture Tests: Created By & Tested By
Letters: Created By & Sent By
Appointments, Tasks, and Alerts: Created By & Assigned To
Sales Lead: Created By & Salesperson
This has the effect of creating a private record between the Created By user and the Assigned To user.

This is very important as each person will be able to view only their own private records plus all public records. A search within each record type will allow choosing to view only private records or only public records or both. If a record begins as public only the record creator or the administrator can change it to private.

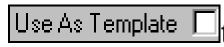
These new records will default to public:
Appointments
Alerts (All System Generate Alerts are public)
Letters
Tasks
Remarks
Projects
Project Tests
Prospects (All Customers are Public)
Contacts
Salesperson Sales Lead

## Templates

There are 2 types of templates in Project Manager.

1. Project Report & Letter Templates - These are stored in a separate template table that can be viewed and edited from *Utilities>Project Manager Set Up>Letter Templates and Utilities>Project Manager Set Up>Project Report Templates*. Letter and Project Report Templates serve as a framework which will have specific information about the related project or record added to it to create a report or letter. These were called defaults in the past.

Letter Templates can be saved by using the Save as Template button in the Update Letter screen. To use an existing Letter Template when writing a new letter, select one of the choices in the Letter Type / Select Letter Template box.

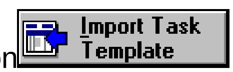

2. Appointment, Task, Alert, Remark and Project Tests - These are not stored in a separate template table. Check the **Use as Template** box 

to indicate that the record can be imported into another record of the same type. These templates serve as a reusable piece of information which will be added to a specific record. To select an existing template to use, click the Import Template button at the bottom of the update screen. 


## Record Templates

A record can be made into a template and then import it whenever needed to create a new task. One example could be a template task to call customer to confirm installation next business day.

Create a template record by entering it as any other record then mark it as a template. Then it will be available when the Import template button is clicked.

When the Import Template Button 

is clicked, choose from the list of records that have been created as templates and those details will automatically be pulled into the new record.

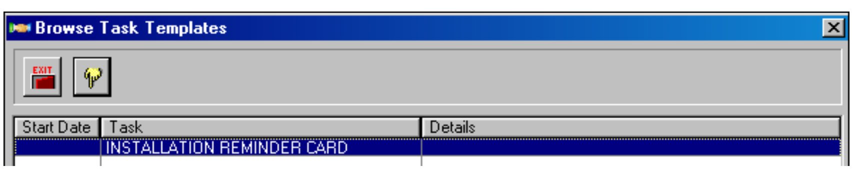



*Figure: Example Template Record*

## Edit Menu

*Project Manager>File>Screen Name>Edit*

Once other screens are open, the edit menu has the same options as that screen's toolbar. For example the only tools on the Workbench toolbar and *Project Manager>File>Workbench>Edit or **Workbench** button on tool bar>Edit* are:
Change: Change the highlighted record.
Refresh: Update the workbench with the latest information.

## Filters and Searches throughout PM

Set the default for each user under *Utilities>System Options>General> Category Default Filters.*

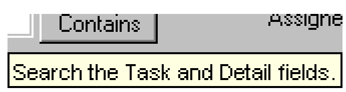
| Module | Applies To | Category | Option | Value |
|---|---|---|---|---|
| Client Management | General | Default Filters | Assigned To User Only | No |
| Client Management | General | Default Filters | Created By User Only | No |
| Client Management | General | Default Filters | Include Active Items | Yes |
| Client Management | General | Default Filters | Include Completed Items | Yes |
| Client Management | General | Default Filters | Include Inactive Items | No |
| Client Management | General | Default Filters | Include Outstanding Items | Yes |
| Client Management | General | Default Filters | Include Private Items | Yes |
| Client Management | General | Default Filters | Include Public Items | Yes |

*Figure General Default Filters*

On each record browse list specify the records to see by checking the options. It is not required to choose between the options. For example choose to see private only, public only or both private and public. Records that are "Completed" will display in blue and "Inactive" will display in gray.

### Search Fields

This will search the fields in the alert for the value typed. Click the button to the right to change from Contains to Starts with. Hover the mouse over the empty field to see exactly what fields are being searched in each browse.




By typing in a few letters or numbers bring up everything that contains that sequence, there is no need for * or %. The exception to this is Order History; a specific order is being sought. It is not necessary to enter CG or ES to search for orders or quotes.

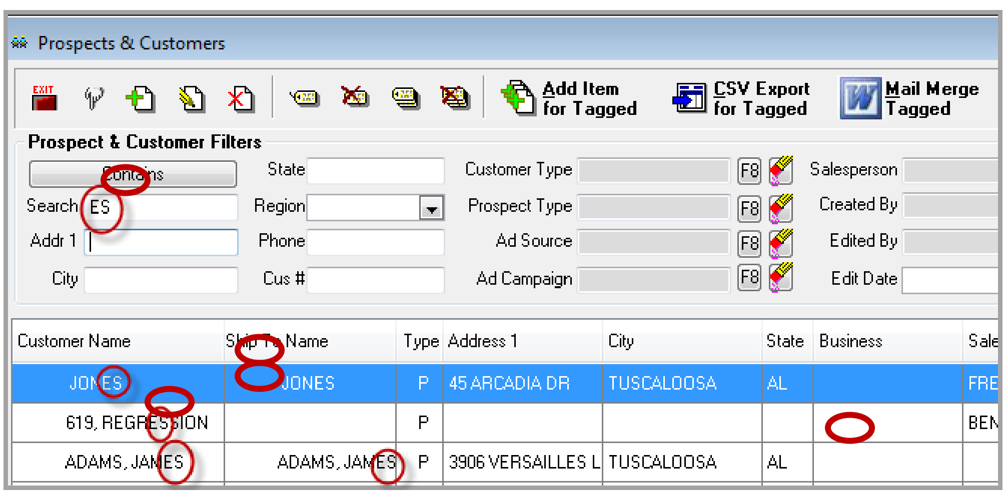
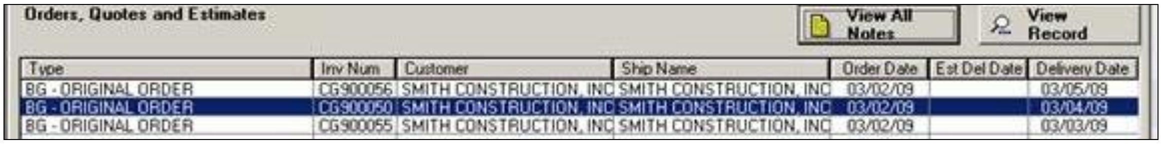



*Figure: Example Text Search Results*

Since all orders in a **billing group are** related, when searching for one order in a billing group all of the orders in that group will be listed. This is indicated by the BG as the type.


Orders, Quotes and Estimates

View All Notes | View Record

| Type | Inv Num | Customer | Ship Name | Order Date | Est Del Date | Delivery Date |
|---|---|---|---|---|---|---|
| BG - ORIGINAL ORDER | CG900056 | SMITH CONSTRUCTION, INC | SMITH CONSTRUCTION, INC | 03/02/09 | | 03/05/09 |
| BG - ORIGINAL ORDER | CG900050 | SMITH CONSTRUCTION, INC | SMITH CONSTRUCTION, INC | 03/02/09 | | 03/04/09 |
| BG - ORIGINAL ORDER | CG900055 | SMITH CONSTRUCTION, INC | SMITH CONSTRUCTION, INC | 03/02/09 | | 03/03/09 |

*Figure: Example Billing Group Orders*

**Ctrl-S** can be used as a search option in these lists:
Remark Type
Sales Leads Types
Prospect Types
Appointment Types
Project Types

## Filter Dates

On Records that use dates, for example, Alerts, filtering by date is an option. Click on the down arrow next to the date field and these options are displayed:

Today: Goes by the computer date

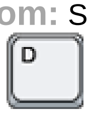
Current Week: Sunday through Saturday

Current Month: The calendar month, so on the 1st of the month only records for that day would be shown.

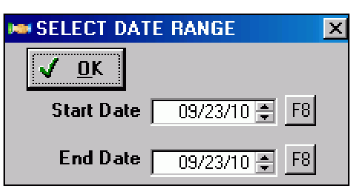
Last Week: The past Sunday through Saturday, so for example on Saturday the 19th, the last week filter will start on the Sunday the 7th.

Last Month: The last calendar month.  So even in the middle of the current month, this filter will show records from the whole prior month.

Last Year: The last calendar year.

Custom: Simply enter the desired start and end date. Here, as with all **date** fields in RFMS, hit the 

key to fill in today's date, type in a date, use the up and down arrows to move the date on day at a time or hit **F8** to bring up a calendar and then choose the date.




## Browse Screens

The Project, Prospect & Customer and Contact update screens are very similar.

The column headings including date fields can be used to sort the list.

Sorting is not possible in:
View Order History
Browse All records.

A series of tabs along the bottom allows access to additional and historical information. The font color of the tab will turn red if there are records meeting the following conditions:

Related Records - Any Exist
Appointments - Outstanding
Tasks - Outstanding
Letters - Drafts
Remarks - Any Exist
Mail - Unread
Tests - Any Exist
History - Any Exist
Record Edits - Any Exist

Right Clicking on most full browse screens (not the workbench) allows these actions.


**Change-** Brings up the highlighted record for editing.
**Reset Filters-** Sets the filters on the browse back to the default
**Refresh-** Refreshes the data listed on the browse to include any recent changes.

## Due Dates

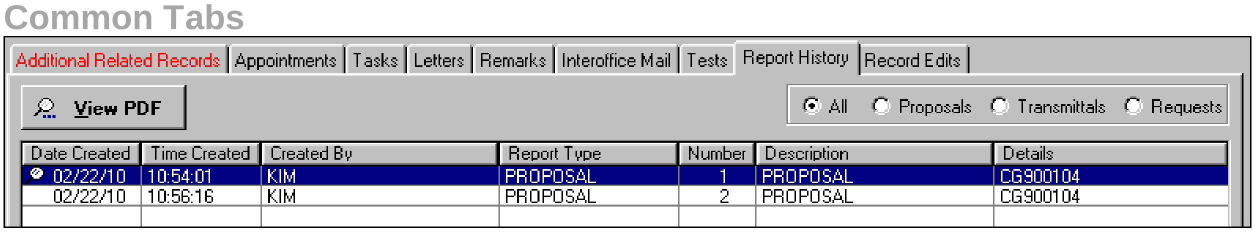
Due Date refers to the date that the Assigned To user needs to complete the item.
For Appointments the Appointment Date is considered to be the Due Date.
For Interoffice Mail the Reply By Date is considered to be the Due Date.
Due dates can be manually added to: Alerts, Letters, Sales Leads, and Tasks.

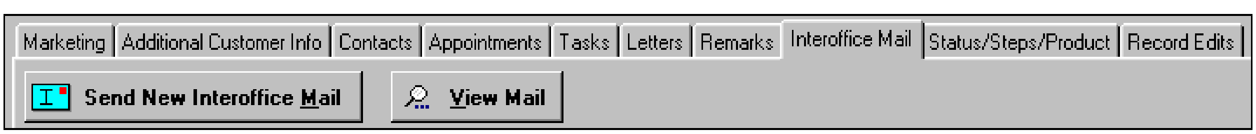
Items will appear in red text on the workbench or in their browse screens if they are past due or are due today.

## Inactive

Items can be either Active or Inactive.  For Interoffice Mail an item is considered to be Inactive if it has been deleted.

## Common Tabs




**Appointments**

**Tasks**

**Letters**

**Remarks**

**Interoffice Mail**
Sending new and viewing previously sent mail related to this record can be done from this tab.

**Record Edits**

## On Prospect & Customer Screens

**Marketing Information**

**Additional Information**

**Related Contacts**

**Checklist Information (Status/Steps)**

## On the Project Data Screen

**Tests**

**Report History**

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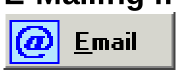
### E-Mailing from PM




An external email can be sent through outlook directly to a contact, prospect or customer. If the email address is in the file it will automatically fill that in. If an email address has been entered in the system options, it will automatically be entered into the CC: field in the email software.
A remark will be added to the record history when an external email is sent.

This is not related to the internal RFMS Mail.

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### Completing a PM Record

Marking a record completed will remove it from the outstanding list and remove any reminders associated with it.

The completed status of an item can have several stages depending on the type of item.

Alerts - Not Started, In Progress, Completed

Appointments - Scheduled, Completed, Tentative, Need To Reschedule, Follow Up Needed, Cancelled - Appointment is considered to be completed if it is marked completed or cancelled. Any reminders will be cancelled also.

Letters - Draft or Sent - Letter is considered completed when marked Sent.

Tasks - Completed or Not Completed

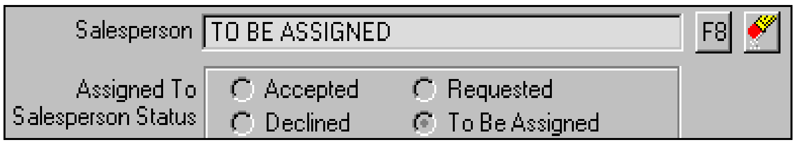
Interoffice Mail - Read, Not Read or Deleted - Message is considered to be completed if it has been Read or Deleted. Deleting a mail message cancels the reminder.

Sales Leads - Up, Quote, Bid Pro Estimate or Order - Sales Lead is considered to be completed if either an Order has been created for or it is marked Lost.

Project Tests - Completed or Not Completed

## To Be Assigned

Records can now have a status of **to be assigned**.
In the Assigned to field, use the clear button and the current user becomes **to be assigned.**
The record status also becomes **to be assigned.**




Items that are **To Be Assigned** will be considered to be associated with the Created By user until it has been assigned and accepted by the Assigned To user. These records will be marked with a blue arrow on the Created by Users' workbench.
This can be used with Tasks, Appointments, Letters, Alerts or Sales Leads.

## Assigning Items

The process of users assigning items to other users has been enhanced.

**Assigned To** refers to the user that is currently responsible for the item.

The **To** field in **Interoffice Mail** is considered to be the Assigned To user.

The **Salesperson** in **Sales Leads** is considered to be the Assigned To user.

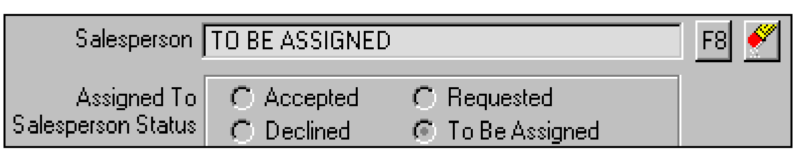
For Alerts, Appointments, Tasks, Letters & Project Tests the field is displayed as **Assigned To**.

### Filtering by Assigned To

- Items will display if they are EITHER
  - Assigned To the filtered user and the Assigned To Status = Accepted/Requested OR
  - Created By the filtered user and the Assigned To Status = Declined/To Be Assigned.

## To Be Assigned

Records can now have a status of **to be assigned**.
In the Assigned to field, use the clear button and the current user becomes **to be assigned.**
The record status also becomes **to be assigned.**



Items that are **To Be Assigned** will be considered to be associated with the Created By user until it has been assigned and accepted by the assigned to user. These records will be marked with a blue arrow on the Created by Users' workbench. .
This can be used with Tasks, Appointments, Letters, Alerts or Sales Leads.

## Requested

Click F8 to get a list of names for the assignment.

The item gets the status Requested until the assigned user either accepts or Declines the task.


The green question mark indicates to the assigned user an item has been requested. This displays in the **Workbench** and in **item browses**. In **Reminders & Requests screen**, the type will be **Request.**

<u>The assigned user can accept or decline the request in any of these 3 places.</u>

1. In the **workbench**, right click to bring up the options or double click to bring up the update screen.

2. In a **browse** list, double click to bring up the update screen. Do not make other changes to the record if declining as the changes will be overwritten with the decline.

3. In the **Reminders & Requests screen**, buttons will display allowing the assigned user to either accept or decline the request.

Accepting or declining changes the assigned to status appropriately.

Declining still leaves the requested name until it is changed.
The Red X indicates to the assigning user that the requested item has been declined. This displays in the **Workbench** and in **item browses**. In **Reminders & Requests screen**, the type will be **Request Declined.**

**System Generated Alerts** will automatically set the Assigned to Status to Accepted. The alert cannot be declined, but can be assigned to another user.

**Internal mail** is considered requested, and will display the in the workbench, if a reply is required but has not been sent. Otherwise the message will be considered accepted.

## Due Date

Due Date refers to the date that the **Assigned To** user needs to complete the item.
For Appointments the Appointment Date is considered to be the Due Date.
For Interoffice Mail the Reply By Date is considered to be the Due Date.
Due dates can be manually added to: Alerts, Letters, Sales Leads, and Tasks.

Items will appear in red text on the workbench or in the browse screens if they are past due or are due today.

# Reminders & Requests

This screen is set to display initially 15 seconds after Project Manager opens if reminders exist. After that the system will run a check every 2 minutes to see if any new reminders need to be displayed.

To Set up Reminders go to *Utilities>System Options>Project Manager>Reminders and Requests>…*

[Reminder Settings](#)

### Interoffice Mail

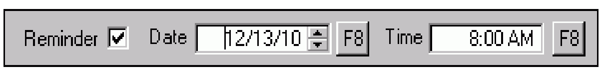
Mail to which a reminder has been added will be included.

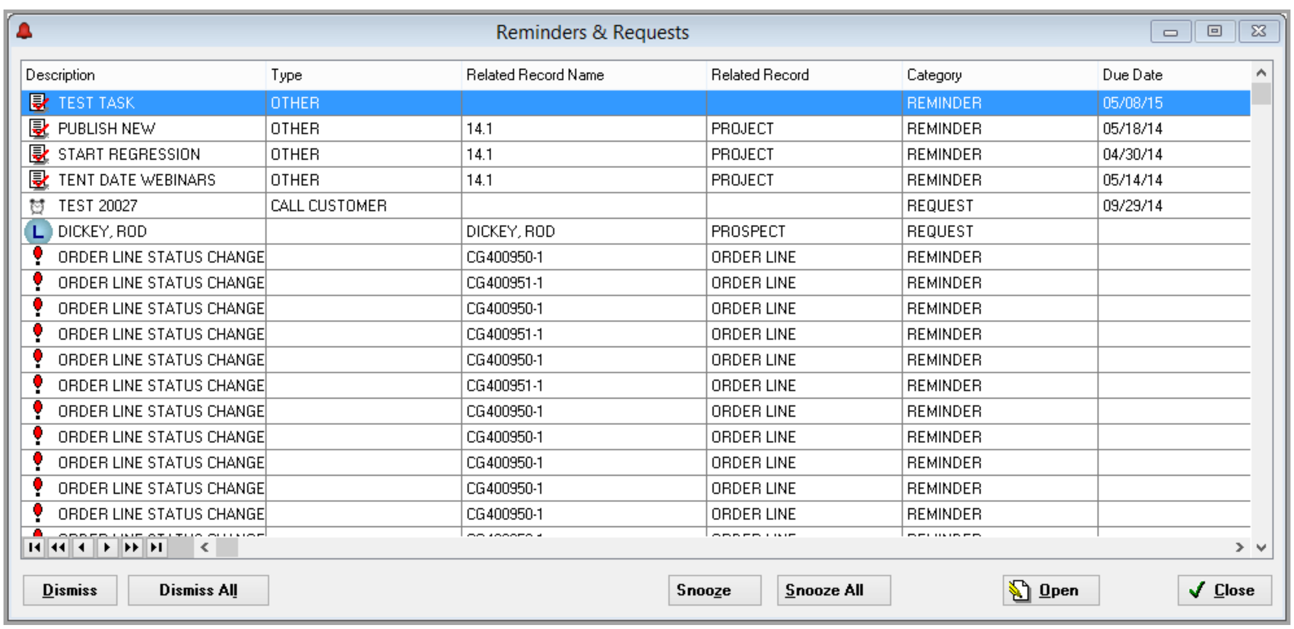
### Requests

The Reminders Screen has been changed to Reminders and Requests; this is in conjunction with the changes in assigning items. [See assigning items for details.](#)

Items requested by other users of you will be listed in this box waiting to be accepted or declined. If an item is declined a Request Declined record will display in Created By user's Reminders & Requests screen. The requesting user can then open the item and decide what to do with the item then.

To set a reminder for a PM record, check the reminder box and then enter the Reminder Date and Time.  Currently reminders are available on Tasks, Appointments, Letters, Alerts, Sales leads and Project Tests and Received Interoffice mail.




| Description | Type | Related Record Name | Related Record | Category | Due Date |
|---|---|---|---|---|---|
| TEST TASK | OTHER | | | REMINDER | 05/08/15 |
| PUBLISH NEW | OTHER | 14.1 | PROJECT | REMINDER | 05/18/14 |
| START REGRESSION | OTHER | 14.1 | PROJECT | REMINDER | 04/30/14 |
| TENT DATE WEBINARS | OTHER | 14.1 | PROJECT | REMINDER | 05/14/14 |
| TEST 20027 | CALL CUSTOMER | | | REQUEST | 09/29/14 |
| DICKEY, ROD | | DICKEY, ROD | PROSPECT | REQUEST | |
| ORDER LINE STATUS CHANGE | | CG400950-1 | ORDER LINE | REMINDER | |
| ORDER LINE STATUS CHANGE | | CG400951-1 | ORDER LINE | REMINDER | |
| ORDER LINE STATUS CHANGE | | CG400950-1 | ORDER LINE | REMINDER | |
| ORDER LINE STATUS CHANGE | | CG400951-1 | ORDER LINE | REMINDER | |
| ORDER LINE STATUS CHANGE | | CG400950-1 | ORDER LINE | REMINDER | |
| ORDER LINE STATUS CHANGE | | CG400951-1 | ORDER LINE | REMINDER | |
| ORDER LINE STATUS CHANGE | | CG400950-1 | ORDER LINE | REMINDER | |
| ORDER LINE STATUS CHANGE | | CG400950-1 | ORDER LINE | REMINDER | |
| ORDER LINE STATUS CHANGE | | CG400950-1 | ORDER LINE | REMINDER | |
| ORDER LINE STATUS CHANGE | | CG400950-1 | ORDER LINE | REMINDER | |
| ORDER LINE STATUS CHANGE | | CG400950-1 | ORDER LINE | REMINDER | |

*Figure: PM Reminders & Requests Browse*

The reminder date and time will work in PM, and can optionally be sent to Outlook (see [below](#).) If Turn on Project Manager reminders is checked in settings they will work in PM.

PM reminders only display when PM is open.

Reminders set in outlook will not transfer to PM.

If a reminder date is selected then the reminder check box will automatically be marked true. If reminder is unchecked, then the reminder date and time fields are disabled.

If a reminder date is selected and the reminder time is blank then it will automatically default to 8:00 AM.

An appointment, Task, alert or interoffice mail which is marked completed or inactive, cancelled or deleted will also satisfy a reminder on the record.  Marking to be rescheduled will not satisfy the reminder.

## Included Records

Records that are both Outstanding and Active and meet one of the following 4 criteria will display:

1. Assigned To current user and Assigned To Status is Requested.
2. Assigned To current user, Assigned To Status is Accepted and Reminder Date/Time is activated.
3. Created By the current user and Assigned To Status is Declined.
4. Created By the current user, Assigned To Status is To Be Assigned and Reminder Date/Time is activated.

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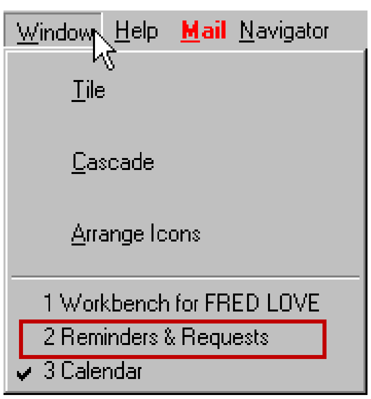
## Snoozing Reminders

If the desired reminder is not highlighted then highlight it. Click the **Snooze** button and select a time to snooze.

The reminders and request screen now has an option to **snooze all** reminders at once.  While this does not snooze the requests, the screen will remain open in the background without popping back up when another screen is selected. To get back to the Screen go to the **Windows** menu, then click on Reminders & Requests in the listing of open screens.

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## Inactive Reminders

If the reminder box is not checked then the reminder date and time fields are disabled.

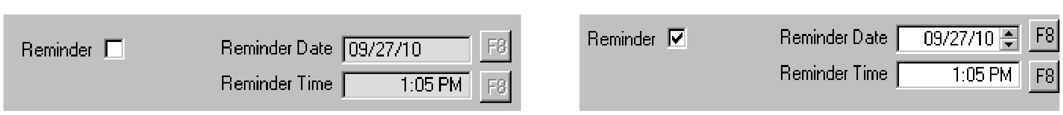



*Figure: Disabled Reminder and Enabled Reminder*

## Integration with Outlook

PM has the capability to integrate with MS Outlook. Tasks and Appointments that are added in PM can be added to Outlook as well. This is a “one-way Street,” and any task or appointment that should show both in PM and Outlook should be first added and then edited in PM.

Deletions in PM: When deleted in PM the item will be moved to the Outlook **deleted folder**. Items in the outlook deleted folder can still be updated.

Changes must be made in PM, not outlook.

The following fields are added/updated in Outlook from PM.

| Outlook Task/Appointment Field | Project Manager Field |
|---|---|
| **Subject** | Task/Appointment |
| **Body** | Details<br>Related Record Information |
| **Priority** | Priority |
| **Location (Appointments)** | Location (Appointments) |
| **Start Date/Time Appointments** | Appointment Date Start Time<br>Required for Synchronization of Appointments |
| **Start Date** | Start Date (Tasks) |
| **Due Date** | Due Date (Tasks) |
| **Reminder On/Off** | Reminder |
| **Reminder Date** | Reminder Date |
| **Reminder Time** | Reminder Time |
| **Reminder Play Sound** | Reminder Play Sound *As set in PM System options |
| **Reminder Sound File** | Reminder Sound File *As set in PM System Options |
| **Creation Date** | Date Created |
| **Creation Time** | Set to Current Computer Time |
| **Modification Date** | Dated Edited |
| **Modification Time** | Set to Current Computer Time |

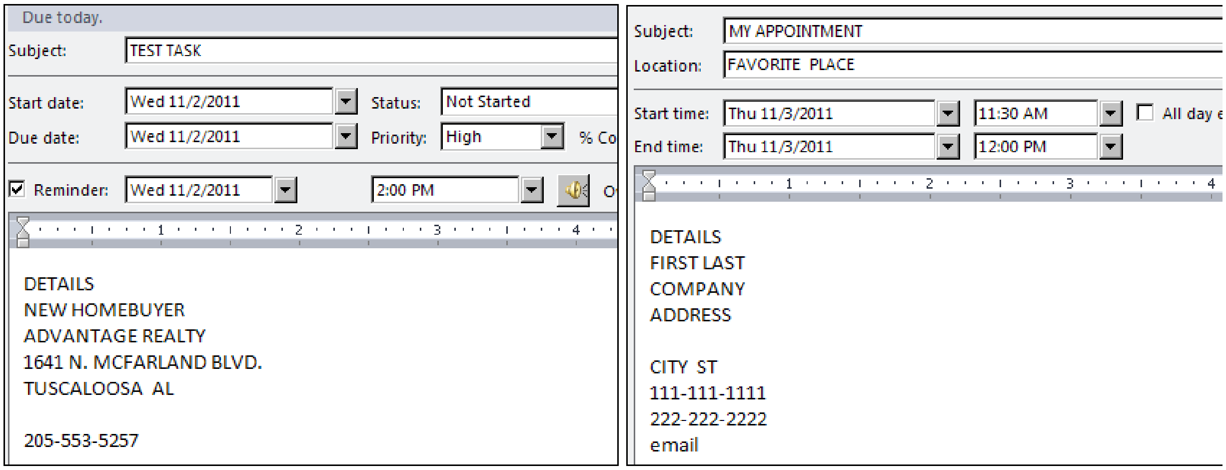



*Figure: Sample Task and Appointment created from PM*

The following are the conditions of the synchronization:

When adding, updating or deleting a task or appointment, if the following conditions are met, the item will be **added, updated** or **deleted** in the users' outlook file automatically:

Synchronize Outlook is enabled for the users.
Automatically Add item is enabled for the users. (**Added only**)
Automatically Update/Delete item is enabled (**Updated or Deleted only**)
User is **not** in Project Manager Remote Actions.
Item is assigned to user and Status is accepted.
Item exists in users outlook file. **(Updated or Deleted)**
Item is either no longer assigned to user or the Status is not Accepted. (**Deleted only**)

When a task or appointments is **deleted** from the **browse** list if the following conditions are met, the item will be **deleted** from the users outlook file automatically:

Synchronize Outlook is enabled for the user.
Automatically Update/Delete item is enabled for the user.
User is not in Project Manager Remote Actions.
Item exists in users outlook file.

When in the task or appointments **browse** list and **add to outlook** button  is used, if the following conditions are met, the item will be added to the users outlook file:

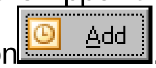
Synchronize Outlook is enabled for the user.
Automatically Add item is enabled for the user.
User is not in Project Manager Remote Actions.
Item is assigned to user and Status is accepted.

NOTE: At this time, using the short cut to accept an Item using the right click on the **Workbench** will **not** automatically add it to the user's outlook files.

Items which have been sent to Outlook will have this button next to them. 

## Adding PM Items to Outlook

1. Automatically: Set the Outlook Setting as described above for all new items to be automatically added to Outlook

2. Manually: In the Tasks browse or the Appointments browse highlight the record to add and Click the Add to Outlook button .



## Outlook Security Software

To get rid of the annoying pop ups for Outlook Security install this 3rd party security software that will allow Allowing and Blocking specific applications for Outlook
[http://www.mapilab.com/outlook/security/](http://www.mapilab.com/outlook/security/)

# View Related Record

This screen is accessible from Order History or anywhere an order, quote or bid is the primary or additional related record.

This information is pulled from the customer order that was highlighted when the **View Related Record** button was clicked.

Information available about the record includes:

- Tracking information
- History
- Custom Notes
- Internal Notes
- Images

If a note or picture is attached, the words on the button will be in red.

The order lines can be sorted by either line number or line status. If a quote is used as a related record and then later deleted, the message **No Related Record** will display.

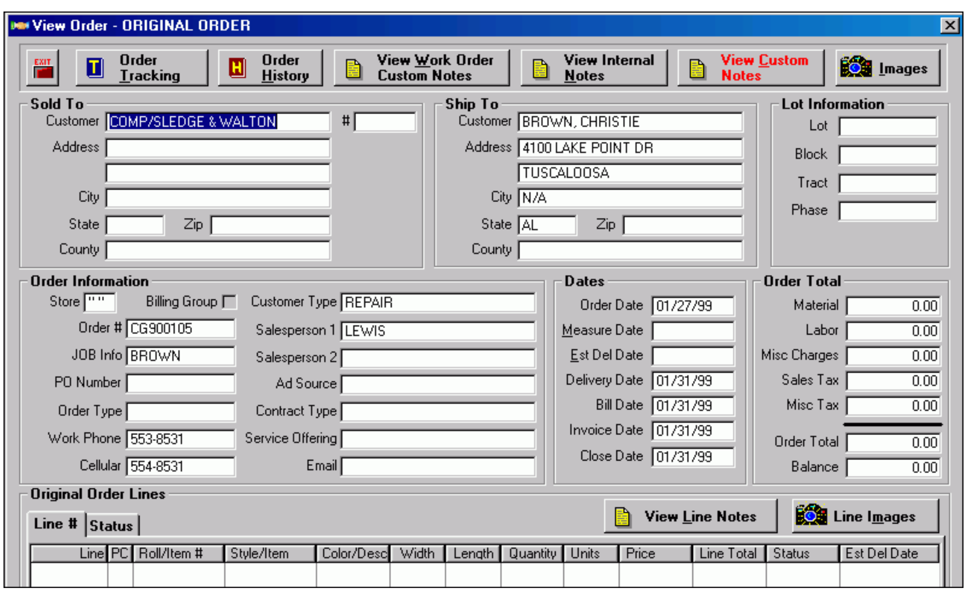




*Figure: View order screen*

# Tracking

Users will be able to browse Order Tracking information on every record insert made into Orders, Quotes and Bid Pro Estimates.

Information being tracked is ...

Date Created
Time Created
Machine Name
User Name
Source (Manual Insert, Web, Link, NHMS, etc...)
Source Table
Source Record Sequence Number
Source Description (application creating the insert)
Destination Table
Destination Record Sequence Number

Order Tracking Information will only be fully populated from 10.6 install date forward.

Click the Order tracking button to see the history. 

If there are no orders the T will be white. 

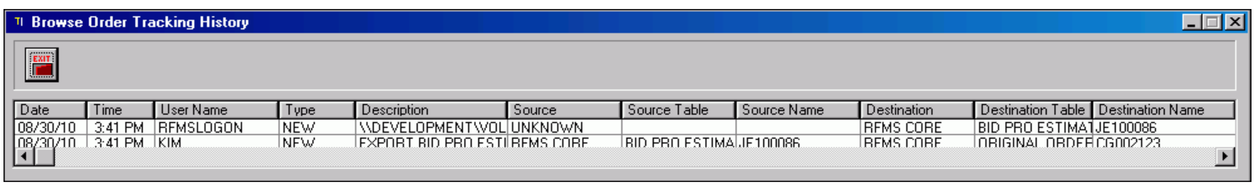



*Figure: Order Tracking History Screen*

# Duplicate Record/Deleting Checking

The program has been updated to either prevent or warn users when duplicates are being added in certain fields.

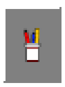
| Adding Duplicate Records not Allowed | | |
|---|---|---|
| Location | Field | Reason |
| *Utilities>Project Manager Set Up>Letter Templates* | **Description** | This is how variations of the same reports are distinguished |
| *Utilities>Project Manager Set Up>Project Report Templates.* | **Description** | This is how variations of the same letters are distinguished |
| *Utilities>Project Manager Set Up>Customer Ad Campaigns* | **Description** | For Similar Campaigns add the date to the Description ex Spring Sale 09 |

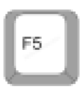
| **Deleting a Record** | **If these record types are being used a message indicating that the record should be made inactive instead of deleting will display.** |
|---|---|
| | *Utilities>Project Manager Set Up*>*Sales Lead Locations* - warning if being used in the salesperson Sales Lead lists |
| | *Utilities>Project Manager Set Up>Checklist* - warning if being used in a customer checklist |
| | *Utilities>Project Manager Set Up>Ad Campaigns* - warning if being used by a customer |
| | *Utilities>Project Manager Set Up>Prospect Types* - warning if being used by a customer |
| | *Utilities>Project Manager Set Up>Project Status* - warning if being used by a project |

# PM Record Types

## Workbench

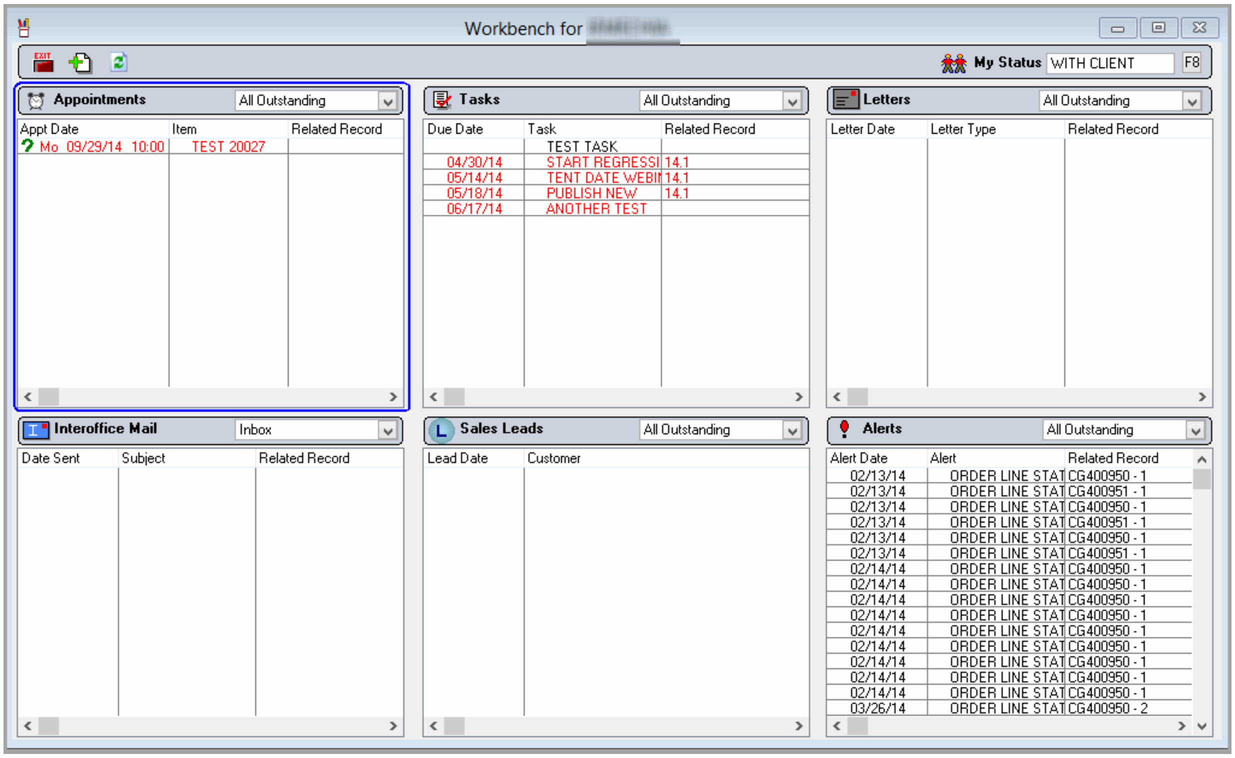
*Project Manager>File>Workbench or **Workbench** button on tool bar*

 The Project Manager Workbench is like a user's master to do list. Every item is not listed on the workbench, but the main action items are. For example items assigned to you will be listed on the workbench, but to see items you have assigned to other users, which have not been accepted, go to the item browse screen.
The format of the Workbench has been changed. The workbench now has a mini browse of PM actions. The browses displayed depend on the Project Manager Mode. The browse currently being worked with is outlined with a blue line.



Use the F5 Key or to refresh the workbench to include recent changes. The browses will also automatically refresh every 60 seconds.

If password protection is added to the individual browses for Insert, Change and Delete, then the user will be required to enter the password when doing these actions from the workbench.




## What is included the Workbench

Items displayed on the Workbench meet the following 4 criteria:

1. Item must not be completed.
2. Item must be Active.
3. Item date falls in the date range selected.
4. One of the following must be true:
   Item is Assigned To the current user and Assigned To Status = Accepted
   Item is Assigned To the current user and Assigned To Status = Requested
   Item is Created By the current user and Assigned To Status = Declined
   Item is Created By the current user and Assigned To Status = To Be Assigned
   For an administrator to see other's items, they must go to the full browse lists.

Note: If a date range is selected that includes past dates, only Outstanding and Active Items that fall in the date range will be displayed.

Item Dates:
Appointment = Appointment Date
Tasks = Due Date
Letter = Letter Date
Alerts = Alert Date Created
Interoffice Mail = Date Sent
Sales Leads = Lead Date Created
Project Workflow Actions = Action Date

***What do you want to see***

## Filters

Each area has a drop down list to specify which records will be displayed on the browse. The options for each record type are:

**Filters for All**
- All Outstanding
- Today
- Custom

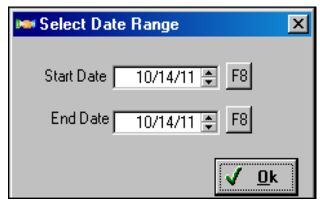
**Filters for Interoffice Mail:**
- Inbox
- Unread
- Last 5 Days

**Filters for Appointments, Tasks, Letters & Project Workflow Actions:**
- Today & Tomorrow
- Next 5 Days

**Filters for Alerts & Sales Leads:**
- Last 5 Days
- Over 5 Days Old

**Custom**

Enter a starting and ending date to create a range.




## What does it all mean

 High Priority Items will be displayed with a Red Up Arrow icon next to the item.

Items that are either past due or due today will be displayed in red text.

Interoffice Mail Items listed in red have a reply requested with status **reply not sent**. The date for past due or today for letters, sales leads and alerts refers to the **Due Date** which is different than the date listed on the workbench of **Letter Date**, **Lead Date** and **Alert Date.**

. Items **to be assigned** will be displayed with a blue right arrow.

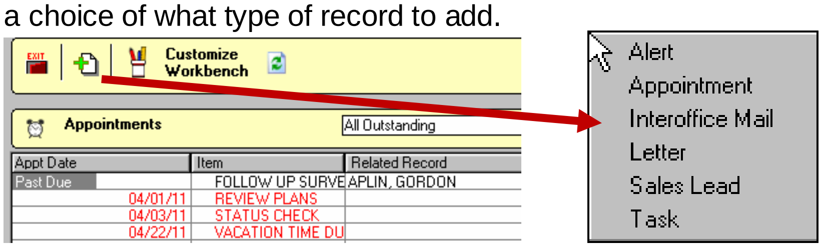
. A declined item will be marked with a red x.

 The green question mark indicates to the assigned user an item has been requested.

## What can you do from the workbench

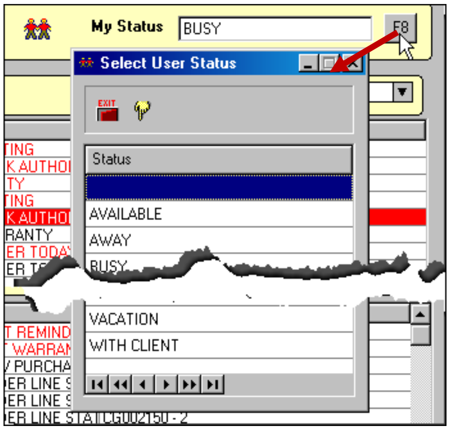
### Insert Records

Click the insert button on the Workbench Tool bar to add a new record. A box displays allowing a choice of what type of record to add.



## Change your Status

Click **F8** next to the My Status field and select a status.




## Working with Highlighted Records

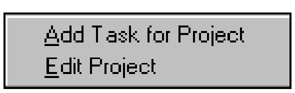
### Edit Screens

Highlight a record in any of the lists on the workbench and Double Click on it. This will bring up the edit screen for that particular record type.

### Right Click or Hit Context Menu Key  then the underlined letter.

These are short cuts which do not require actually opening the record. Highlight a browse in the workbench and then a record in any of the lists on the workbench and Double Click on it or hit the context menu key. Accepting an item using the right click feature on the workbench will not automatically add/update/delete the item from the user's outlook files. The following actions are possible depending on the record type.


New Item
Edit Item
Assign Item (Not applicable for Interoffice Mail)
Mark Item Completed (Not applicable for Sales Leads)
Delete Item
Accept Item
Decline Item
View Related Record




Add Task for Project - (Project Workflow Actions Only)
Edit Project - (Project Workflow Actions Only)

# Interoffice Mail

*Project Manager>Mail*


## RFMS Interoffice Mail Overview

The ability to generate and send mail from one user to another within the RFMS Application is available from any RFMS module. This system is basically used for tracking information on specific orders, inventory records, payables, etc. Only those users who have logged into the RFMS application will be available for email. Once a user logs into the RFMS application, their user name will be available in the user list.

## Receiving a Message

When a message is received, a notification box is displayed no matter which module in the RFMS system is opened. The word **Mail** will also be in bold until open messages have been checked.


*Figure Mail Notification*

If not already open, open Inter office mail.


*Figure: RFMS Mail Tool Bar*

The options then are:

Reply to or forward the message, which will bring up the new message box.

Swap between “Mark as Read” and “Mark not Read”. Opening a message will automatically mark it as read.

Double clicking on the highlighted message allows viewing the full detail.

Filter the messages shown by selecting Current/Deleted or Sent.

High priority mail, not read and not deleted is in red.

Deleted mail is in gray.

Read but not deleted mail will be in blue.

Not read, not deleted and not High Priority mail will be in black.

Any email that has not been read, regardless of color coding will be **BOLD**.

**Internal mail** is considered requested, and will display the  in the workbench, if a reply is required but has not been sent. Otherwise the message will be considered accepted.

Deleting a current or sent message does not permanently delete the message, but puts it into the deleted list. It then can be permanently deleted from the deleted list. A confirmation will be required first.


From the list of messages highlight the message to see, and the body will show in the preview screen below.

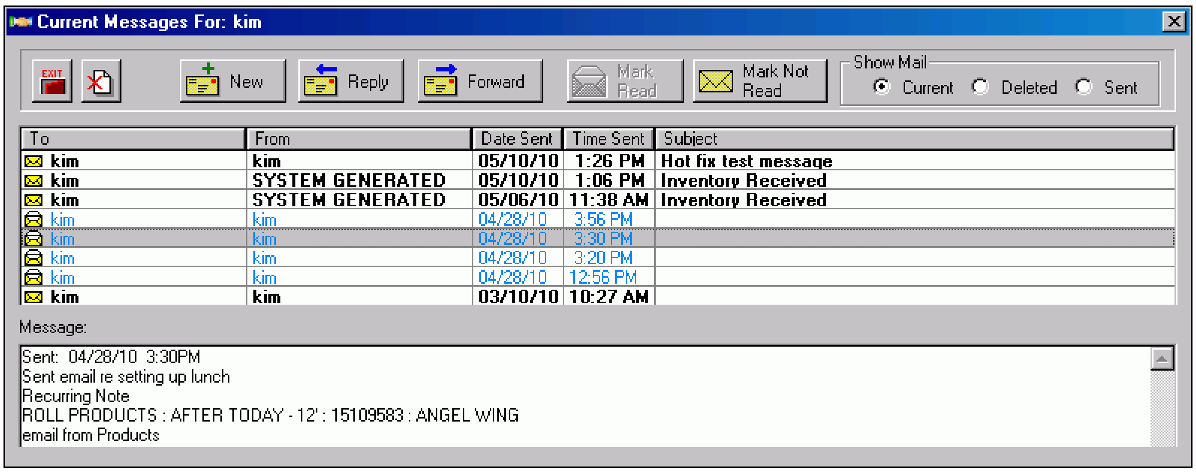
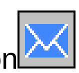


*Figure: RFMS Mail Browse Screen*

## Sending a Message

To send a message associated with a particular record, click on the button .

The New Message box will appear with that record referenced in the body of the interoffice mail message. Any template remarks added will go to the top of the message.

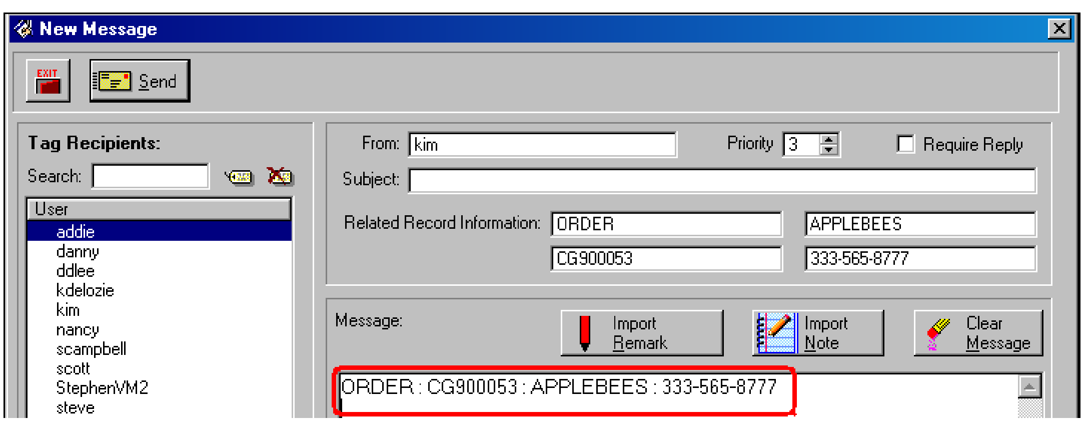
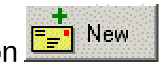


*Figure: RFMS New Message Screen*

While in PM to a new general message, click on the new button 



Once the new message box is displayed from either of these methods:

- Tag the recipient(s). One or more recipients may be tagged
- The From name pulls from RFMS login information.
- Set a priority of 1 to 3 to the message and choose to require a reply. Each organization should decide what each priority means.

  Example: 1 Urgent 2 Important 3 Informational
- Type into the subject field.

  It is best to make the subject something that gives a quick idea of the topic as it will show on the list of current message.
- Message: Select a template note from the Template Remarks which are specific to the PM or from Recurring Note file which is shared by all RFMS Modules or type a new message into the message block.
- When finished click the send button

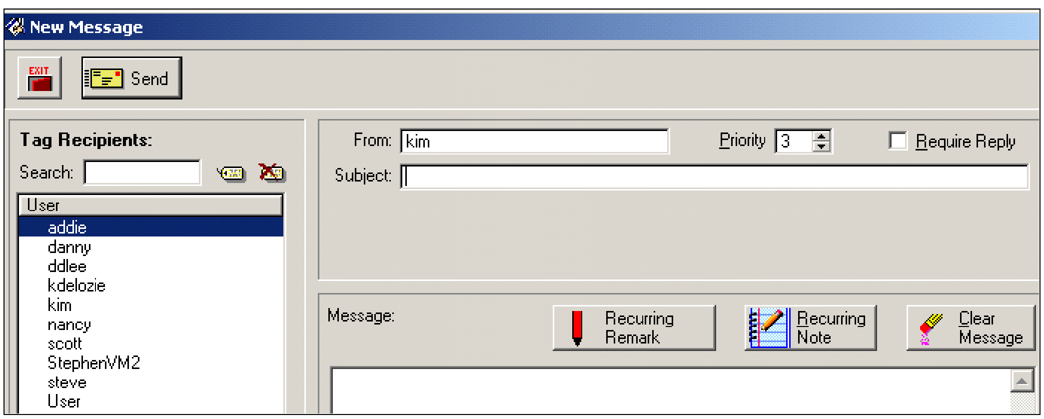
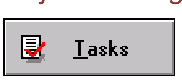




*Figure: RFMS Mail selecting recipient*

# Tasks

*Project Manager>File>Tasks or **Tasks** button on tool bar*





## Browse Tasks

**Search Fields:** This will search the **Task** and **Detail** fields in the tasks for the value typed. Click the button to the right to change from Contains to Starts with.

**Due Date Filter:** Use the drop down list which includes today, this week etc.

**Assigned to/created by:** The default for this can be set in System Settings.

When filtering by Assigned To, tasks will display if they are EITHER 1) Assigned To the filtered user and the Assigned To Status = Accepted/Requested OR 2) Created By the filtered user and the Assigned To Status = Declined/To Be Assigned.

If included in the filter:
**Assigned To Status = Requested** a Green Question mark will display.
**Assigned to Status = To Be assigned** a Blue Arrow will display.
**Assigned to Status = Declined** a red x will display.

**Task Type:** filter by Task Type to group like tasks together for efficiency

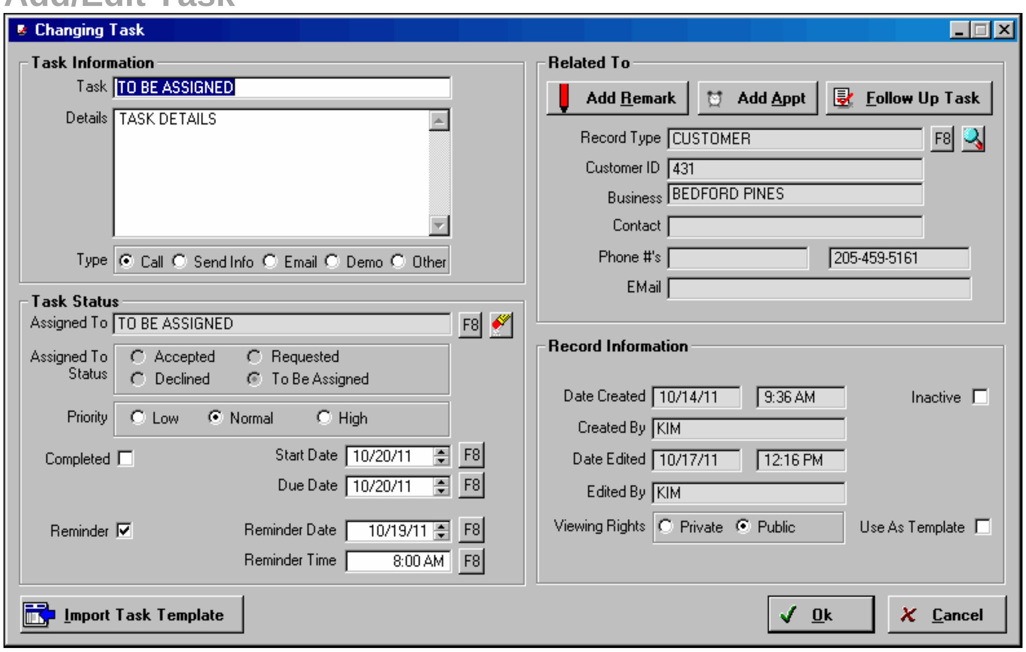
**High Priority Tasks** will have a red arrow displayed next to them.
Inactive will be listed in gray. Completed or cancelled tasks are listed in blue. Uncompleted tasks will appear in red text on the workbench or in their browse screens if they are past due or are due today.

The data can be sorted by any of the column headings including date fields.

## From the Toolbar or Edit Menu


Add/Edit/Delete a task Add a Task to Outlook Reset Filter Refresh listing

## Add/Edit Task

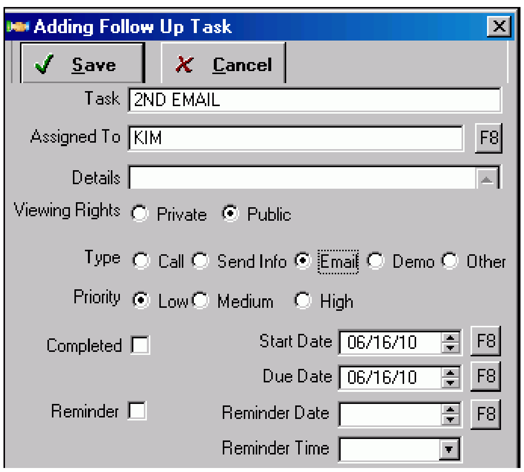



The **Task** Name is required.
Next enter the **details**.
Click to choose a **Task type**. **Task type** is optional, but using it allows sorting by task type on the browse screen and group like tasks together.
**Assigned to:** will default to the current user, but tasks can be assigned to other users.

The **assigned to status** will be completed automatically by the system depending on the user response.
**Start date** and **due date** can also be entered. If no **due date** is entered, then the **due date** will be set to the **start date**.  If a due date exists and the start date changes, then the due date will be adjusted accordingly. Pressing F8 next to the date field allows choosing this date from a calendar.
Check next to **completed** to mark the task as done. A task's status can only be completed or not completed.
**Reminder:** check this box to enter a reminder that will display automatically reminders & requests box until the task is marked completed or the reminder box is unchecked.

For a series of tasks that are usually done together, create templates for this series and then just edit the specific details.

A follow up task can be created while editing a task.




An appointment can be scheduled from the update task screen, by clicking the Appointment button.

Tasks may be globally added for multiple records.

## Appointments

*Project Manager>File>Appointments or* ***Appointments*** *button on tool bar*

An appointment differs from a task in that it has a start and end time which must be entered. Appointments also have a location and show on the calendar.

## Appointment Browse

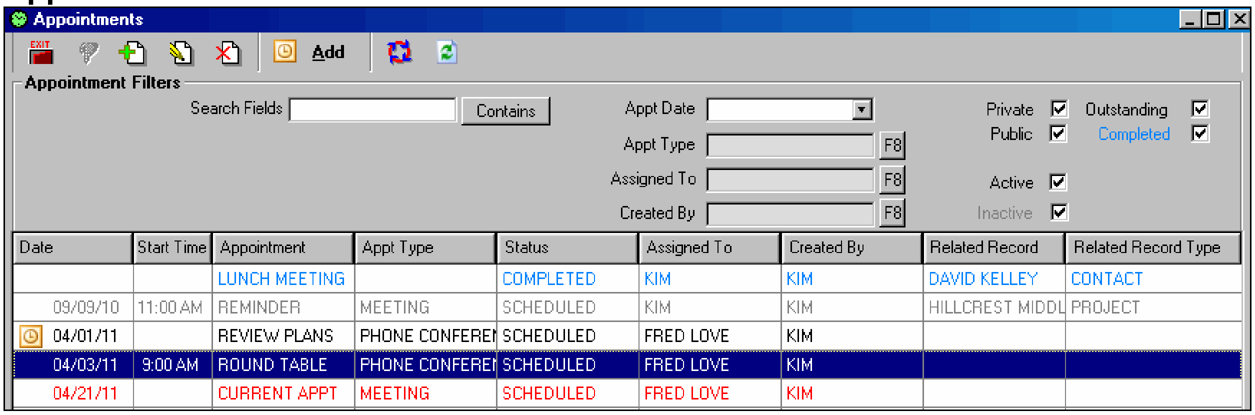



*Figure: Browse Appointments*

### Filters

**Search Fields:** This will search the fields in the appointment for the value typed. Click the button to the right to change from Contains to Starts with.

**Appointment Date:** Use the drop down list which includes today, this week etc.

**Appointment Type:** Use the F8 button to search by the list created in System Settings.

**Assigned to/created by:** The default for this can be set in System Settings.
When filtering by **Assigned To** in Browses: Items will display if they are EITHER

- Assigned To the filtered user and the Assigned To Status = Accepted/Requested OR
- 2) Created By the filtered user and the Assigned To Status = Declined/To Be Assigned.

If included in the filter:
**Assigned to Status = Requested** a Green Question mark will display.
**Assigned to Status = To Be assigned** a Blue Arrow will display.
**Assigned to Status = Declined** a red x will display.

**High Priority Items** will have a red arrow displayed next to them.
Inactive or completed items will be listed in gray. Completed or cancelled items are listed in blue. Uncompleted items will appear in red text on the workbench or in their browse screens if they are past due or are due today.

The data can be sorted by any of the column headings including date fields.

### From the Toolbar or Edit Menu


Add/Edit/Delete an appointment Add Appointment to Outlook Reset Filter Refresh listing

## Add/Edit Appointment

An appointment differs from a task in that it has a start and end time. Appointments also have a location and show on the calendar.

When adding or editing an appointment PM gives a warning if a time conflict is found.

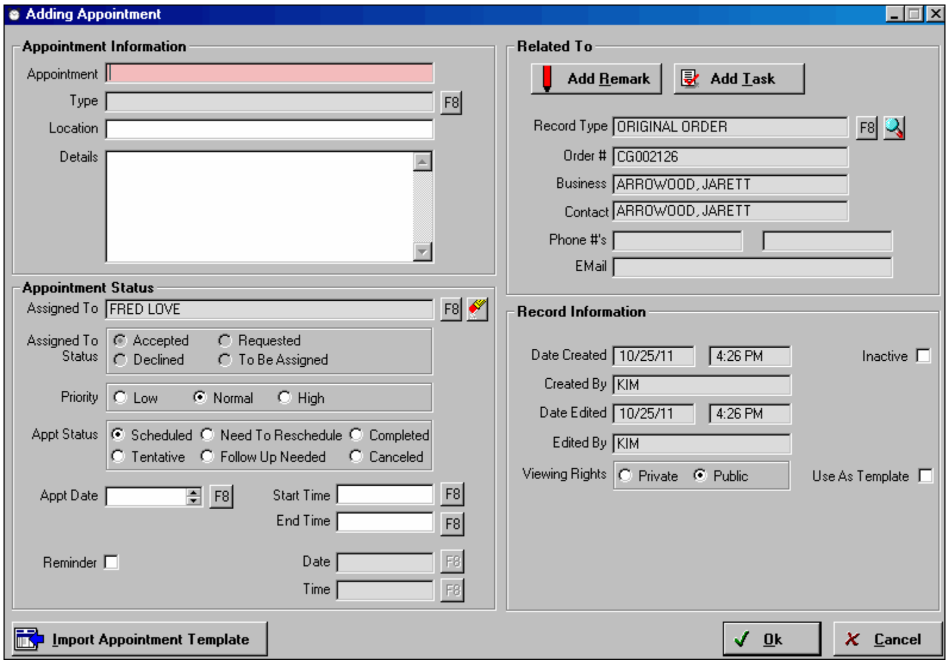




*Figure: Add/Edit Appointment Screen*

Enter information or use the Import Appointment Template Button to pull information from a previously created template.

**Appointment:** Enter a description. This will show on the browse screen and the calendar.

Choose an **Appointment Type.** The type list is set up in *Utilities>Project Manager Set Up.* This shows on the browse list but does not show on the calendar. The appointment type can be used to filter appointments both on the browse list and the calendar. This can be useful in scheduling like appointments together.

Type in **Location** if desired. The company address from the appointment related record populates the location field in both the PM appointment record and outlook.

Type in **Details** if desired.

## Assigned To

Refers to the user that is currently responsible for the item.
Assigned to will default to the current user, but can be assigned to other users.
The **assigned to status** will be changed automatically by the system depending on the user response.

### To Be Assigned:
In the Assigned to field, use the clear button and the current user becomes **to be assigned.** The record status also becomes **to be assigned.**

### Requested
Click F8 to get a list of names for the assignment. The item gets the status **Requested** until the assigned user either accepts or Declines the task.

Due Date refers to the date that the **Assigned To** user needs to complete the item.

### Appointment Status
Click to choose a status. This will show on the browse screen.
Choices for appointments are: Scheduled, Tentative, Need To Reschedule, Follow Up, Needed, Completed and Canceled. An appointment is considered to be completed if it is marked completed or cancelled.

Notes: The Appointment Status is a dropdown menu. It does not reset with the reset button.

### Appointment Date
Optionally enter the date and times. This will show on the browse screen.
For Appointments the Appointment Date is considered to be the Due Date.
When adding or editing an appointment PM gives a warning if a time conflict is found.

### Start/End Time
If no End Time exists, it will default to 1 hour after the start time. For example, if a start time of 8:00 AM is entered, the default end time will be 9:00 AM.

If an End Time exists and the start time changes, the end time will default to the same time span. For example, with an existing start time of 12:30 PM and end time of 2:30 PM, if the start time is changed to 1:30 PM the end time will automatically change to 3:30 PM.

### Related to
A remark or task can be added to this related record from this screen.
Much of the **Record Information** is automatically updated by the software:

| | |
|---|---|
| The Date/Time Created | Date/Time Edited |
| Created By | Edited by |

Check to make a record **inactive.**
Choose the **Viewing Rights** as either **Private** or **Public**. If a record is marked Private, it will be private not only to the “Created By” user. It includes the user that the item is assigned to.

This has the effect of creating a private record between the Created By user and the Assigned To user.
This is very important as each person will be able to view only their own private records plus all public records. If a record begins as public only the record creator or the administrator can change it to private.
Check Use as Template to make this information available for creating future items.

 **Notes:**

When adding a new appointment and selecting a related record, users can choose to use the Ship To or Sold To location.

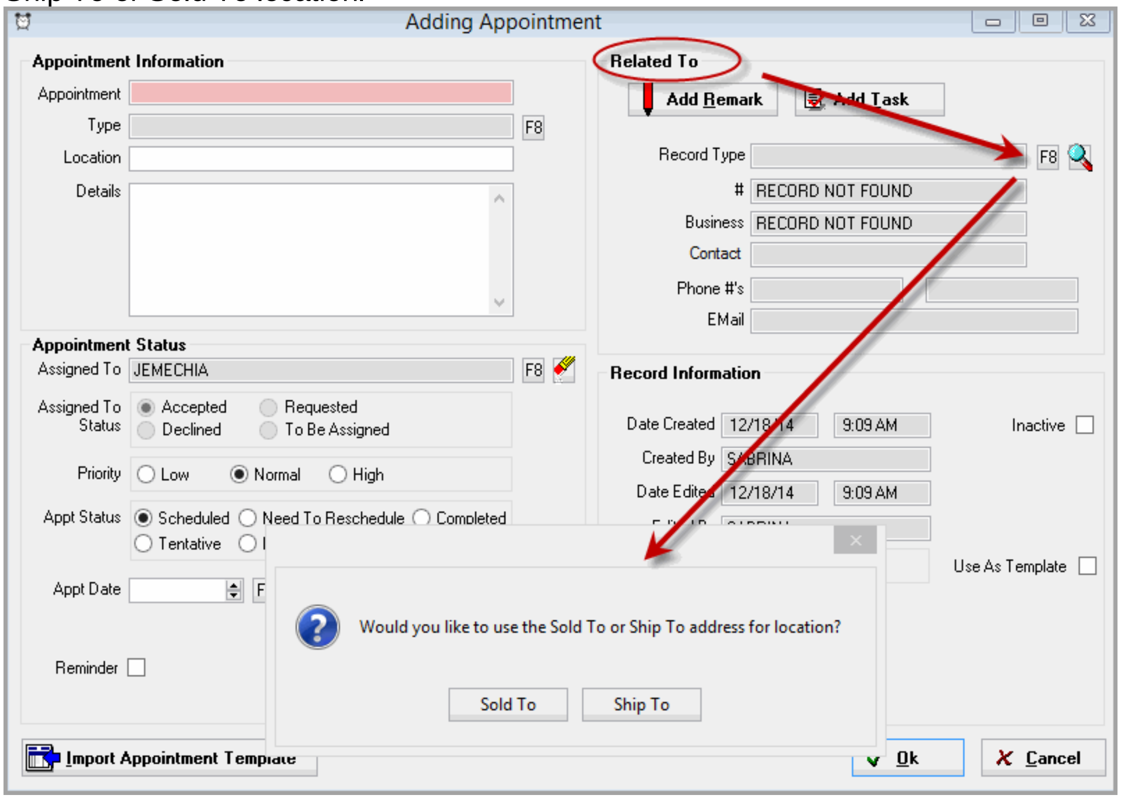



*Figure Adding Appointments Screen*

---

# Calendar

*Project Manager>File>Calendar or **Calendar** button on tool bar* 

The calendar format is for the week starting on Monday. Currently only appointments are shown on the calendar. Today's date is in red. Use the arrow buttons to move back and forth a month at a time. 

From the calendar use the buttons in the top-left corner to manage tasks.

| | |
|---|---|
| Add -Green plus | Edit - Pencil |
| Delete Red X with paper | Copy (Stacked Papers) |

Paste (Clip Board) to a new date

Printer- Print a copy of the calendar which looks just like the screen view.

Right click on an appointment and the same editing options are available

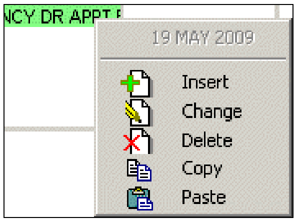


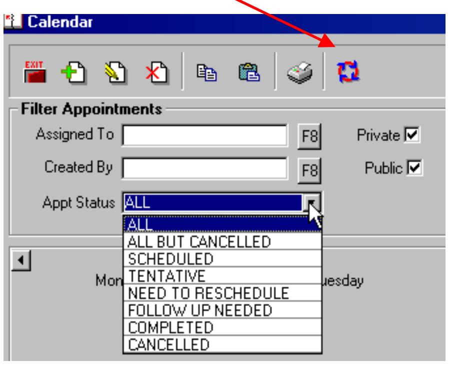
*Figure: Editing an Appointment*

Drag and drop to schedule on another date. Double click on an appointment to get to the update appointment screen.

Filtering by Assigned To, Created By, Active/Inactive, Private/Public and Appointment Type is possible. For appointment types, to include more than one type, highlight and check the types to include. Appointments which were added before appointment types were created, will be *no type assigned*.

Cancelled appointments can optionally be shown on the calendar. To include them, choose **all** in the **Appointment Status** field.

Remember to reset the filters if you need to change any of the fields.




The detail for the highlighted appointment is shown on the right hand side of the calendar.

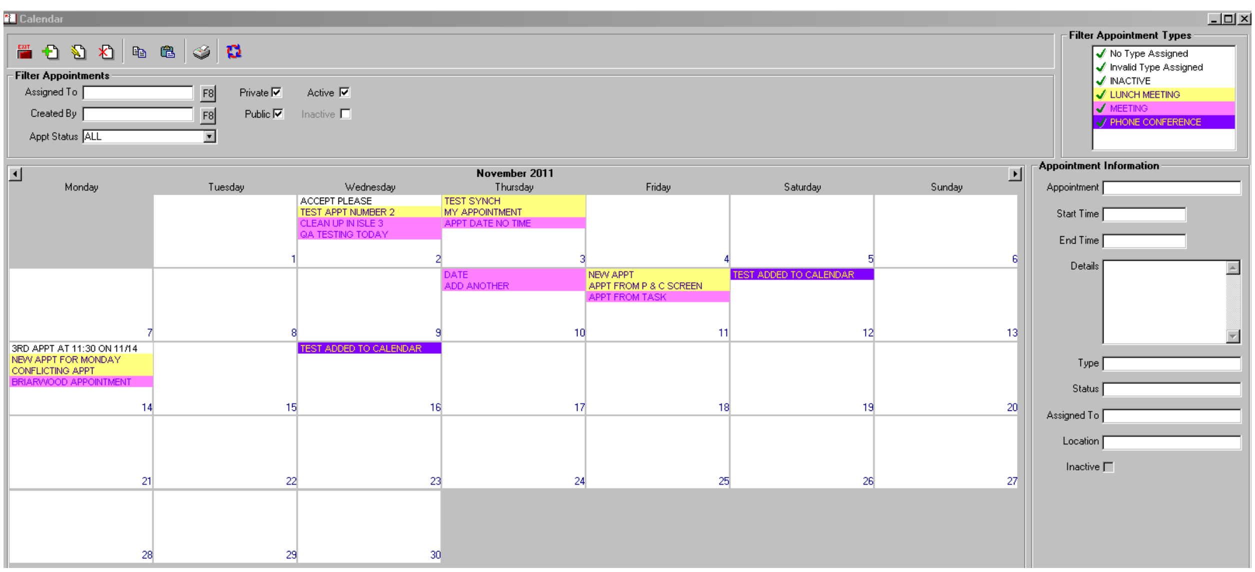


*Figure: Sample Calendar*

## Letters

*Project Manager>File>Letters or **Letters** button on tool bar*


Default information and variations for these letter types can be set in *Utilities>Project Manager Set Up>Letter Types* Individual letters may also be used as templates.

### Browse Letters

This is a listing of the letters which have been drafted or sent based on the filter information chosen.

**Search Fields:** This will search the Title, Attention, Salutation and Regarding fields in the letter for the value typed. Click the button to the right to change from Contains to Starts with .

**Letter Date:** Use the drop down list which includes today, this week etc.

**Assigned to/created by:** The default for this can be set in System Settings.
When filtering by Assigned To, items will display if they are EITHER 1) Assigned To the filtered user and the Assigned To Status = Accepted/Requested OR 2) Created By the filtered user and the Assigned To Status = Declined/To Be Assigned.

If included in the filter:
**Assigned To Status = Requested** a Green Question mark will display.
**Assigned to Status = To Be assigned** a Blue Arrow will display.
**Assigned to Status = Declined** a red x will display.

**High Priority Tasks** will have a red arrow displayed next to them.
Inactive or completed tasks will be listed in gray. Completed or cancelled tasks are listed in blue. Uncompleted tasks will appear in red text on the workbench or in their browse screens if they are past due or are due today.

The data can be sorted by any of the column headings including date fields.

**Due date** can be manually added to Letters. Letters will appear in red text on the workbench or in their browse screens if they are past due or are due today.

### From the Toolbar or Edit Menu

Add/Edit/Delete a letter Reset Filter Refresh listing

## Adding or editing a letter

Enter information or use the Import Template Button to pull information from a previously created template.

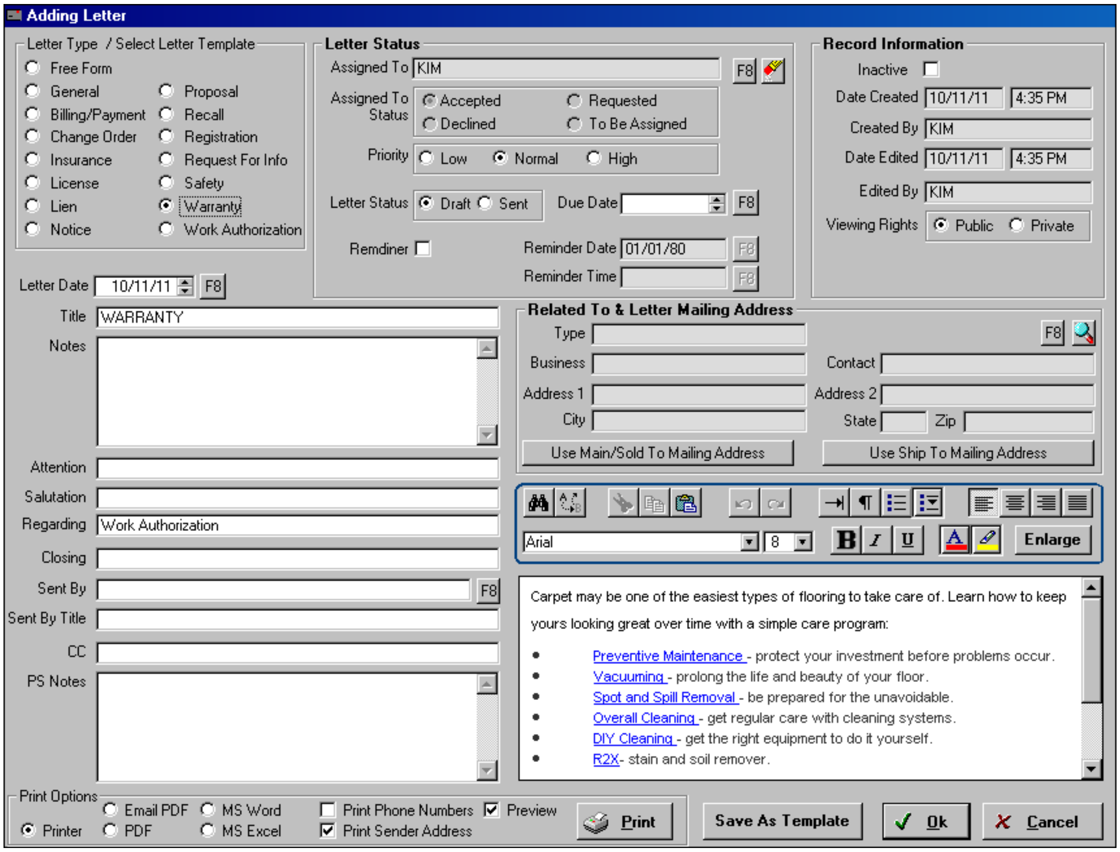
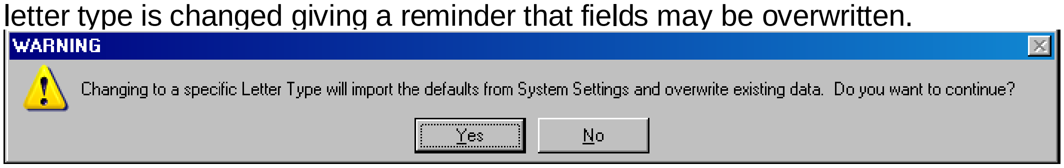



*Figure: Letter Set up*

### Types

Choose the letter type by clicking an option button. If there is more than one version of the letter type, a pop up box will prompt choosing a version. The default information will then be imported. Any of the information that has been imported may be edited. The difference between the other letter types is determined by how it is set up in Report & Letter Defaults.

Because these defaults can be different for each letter type, a warning will display when the letter type is changed giving a reminder that fields may be overwritten.




If any edits have been done, save the specific letter before changing types.

### Free Form

This is what was considered to be a general letter, and there are no default settings for this letter type, and it cannot be used to create a template.

### General

The letter type general has been enhanced to have the ability to have different versions or templates.

The difference between the other letter types is determined by how it is set up in Report & Letter Defaults. The Letter Type will appear on the letter except for the general letter. This is helpful for clients who have a series of letters that must be sent to each client.
Then choose the related record.

## Letter Status

### Assigned To

Refers to the user that is currently responsible for the item. Assigned to will default to the current user, but can be assigned to other users.

The assigned to status will be changed automatically by the system depending on the user response.

### To Be Assigned:

In the Assigned to field, use the clear button and the current user becomes to be assigned. The record status also becomes to be assigned.

### Requested

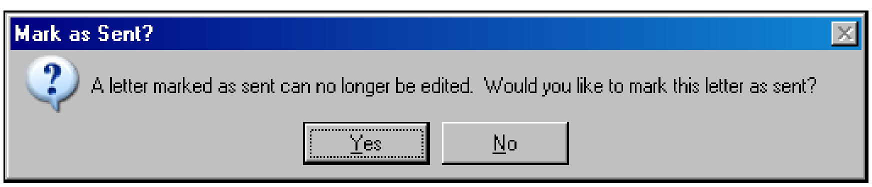
Click F8 to get a list of names for the assignment. The item gets the status Requested until the assigned user either accepts or Declines the task.

**Due Date** refers to the date that the Assigned To user needs to complete the item.
**Priority** Click to select a **priority**.
**High Priority Items** will have a red arrow displayed next to them in browse lists.

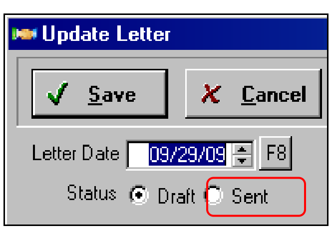
### Sent Status

Once a letter is marked as sent it can no longer be edited, this includes letters marked as templates. Sent is the letter equivalent to completed. Copying and pasting information from a sent letter or marking a sent letter as a template is allowed. The template is still available to be exported and this new letter can be edited.

After a successfully printing a letter, there will an option to mark the letter as sent.




A letter can also be marked as sent manually by clicking the sent radio button on the update letter screen.



**Reminder:** check this box to enter a reminder that will display automatically reminders & requests box until the item is marked completed or the reminder box is unchecked.

Optionally enter a reminder date and time.

## Record Information

Much of the Record Information is automatically updated by the software:

| | |
|---|---|
| The Date/Time Created | Date/Time Edited |
| Created By | Edited by |

Check to make a record inactive.
Choose the Viewing Rights as either Private or Public. If a record is marked Private, it will be private not only to the "Created By" user. It includes the user that the item is assigned to.

This has the effect of creating a private record between the Created By user and the Assigned To user.

This is very important as each person will be able to view only their own private records plus all public records. If a record begins as public only the record creator or the administrator can change it to private.

## Letter Content

**Regarding** is no longer a required field.

To allow more room for editing letter content, there is a now a enlarge button which displays the letter content in its own window. You can also double click within the letter content box to display the enlarged edit area.

**Letter date** is the date to be printed on the letter.

The mailing address and contact information is pulled from the related record. Contact #1 is used as the name on the inside address. Choose to use the main address or ship to address. The pulled information can be edited. This edit is only for the letter it does not affect the original record.

There are check boxes to choose to print the phone number and sender address on the letter.

The entire letter will print in the same font style and font size as selected for the body of the letter. If more than one font is used in the body of the letter, the first font will be used to print the rest of the letter. Letters are limited to font sizes 8, 9, 10, 11 or 12 as fonts larger than the address information will not fit in their areas. The margins are set to 1 inch.

## Letter Templates

Letter types other than Free Form **can** be saved as a template. This process was required to be done through *Utilities>Project Manager Set Up>Letter Templates.* Templates can now be created directly from the Letters Add/Update Screen as well.

1. Choose the letter type.
2. Fill in any of the information in the white fields.
3. Click the save as template button.
4. The information entered on the letter will be saved as a template.
5. The Template type is determined by your letter type choice in #1.

6. Give a description here to help identify the specific template; otherwise the system will name the template with the template type and a number.

Letter templates can be **saved as templates** from the letter module. To change an existing template, go to *Utilities>Project Manager Set Up>Letter Templates* or save the changed template under a new description.

## Print Options

When printing a letter, previewing the letter before printing is an option.  It can also be E-mailed or choose from the output options: Spreadsheet, Word Document, Text File or PDF file.

## Sample Letter

**WARRANTY from System Settings**

02/24/10

Chandler's Department Store
9900 Main Ave
Tuscaloosa AL 35401
333-897-5421

Notes from System Settings

Attention from System Settings

Salutation from System Settings

Warranty from System Settings

Details from System Settings

Carpet may be one of the easiest types of flooring to take care of. Learn how to keep yours looking great over time with a simple care program:

- Preventive Maintenance - protect your investment before problems occur.
- Vacuuming - prolong the life and beauty of your floor.
- Spot and Spill Removal - be prepared for the unavoidable.
- Overall Cleaning - get regular care with cleaning systems.
- DIY Cleaning - get the right equipment to do it yourself.
- R2X- stain and soil remover.

### No carpet is absolutely stain proof

Some carpets have stain resistant treatments that improve your ability to clean stains, but not prevent them. Similarly, carpets with soil resistant treatments reduce the rate of soiling, but all carpets require regular care and maintenance. Resist carpet soil and stains with R2X, Shaw's own breakthrough technology.

Closing from System Settings

Sent by from System Settings
Sent by Title from System Settings
Demo Data
3073 Palisades CT
Tuscaloosa, AL 35405
(205) 553-5257

CC from System Settings

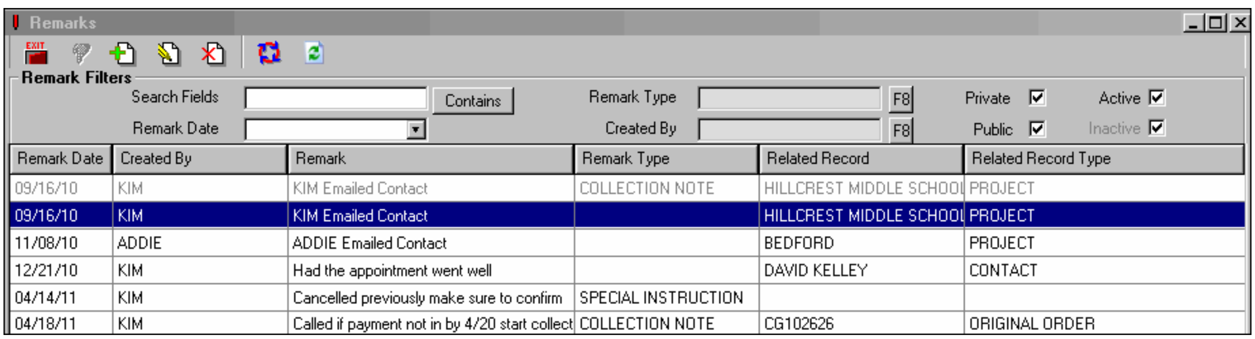
Notes from System Settings

# Remarks

*Project Manager Module>File>Remarks or **Remarks** button on tool bar*


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. RFMS Notes can also be edited from PM. Filter the list by remark date using a provided selection list which includes today, this week etc. To view details or edit a remark, highlight the line then double click or click on the edit button.

Remark can be added via RFMS in a customer order or a quote, by clicking the Remote Action button  choose to add it to the selected order or the selected customer or both. Adding to both requires clicking the add remark button twice.




## Browse Remarks

**Search Fields:** This will search the remark field in the remark for the value typed. Click the button to the right to change from Contains to Starts with.

**Remark Date:** Use the drop down list which includes today, this week etc.

**Remark Type:** Types are set in *Utilities>Project Manager Set Up>Remark Types*.

**Related to:** A remark, appointment or task can be added to this related record from this screen

**Created By:** Set the default for this in *>Utilities>System Options>Project Manager>General>Created by*

**Active/Inactive:** If included in the filter, inactive Remarks will be listed in gray.

Data can be sorted by any of the column headings including date fields.

## From the Toolbar or Edit Menu

Add/Edit/Delete a Remark     Reset Filter     Refresh listing

## Add/Edit Remark

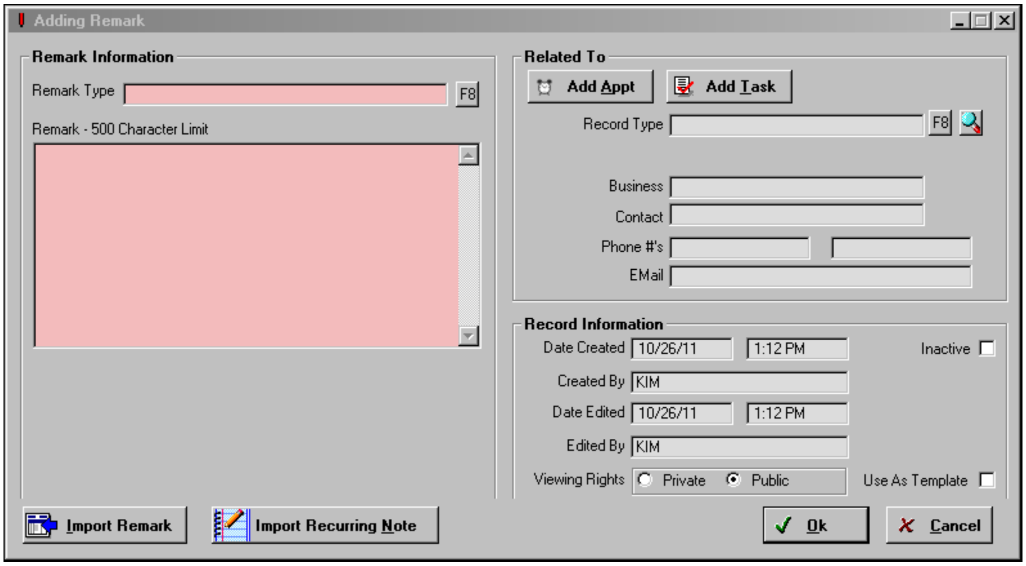



*Figure: Remark Add/Edit Screen*

Enter information or use the Import Template Button to pull information from a previously created template.

**Remark Type:** Types are set in *Utilities>Project Manager Set Up>Remark Types*.

These remark types are available on the A/R Report, A/R Collections and Ageing Reports in RFMS and as filters for Customer Orders and Quotes.

Click **Import Remark** to use a previously created **Remark Template**.

Click **Import Recurring Note** to use a recurring note from RFMS for the remark. The maximum size for a remark is 500 characters. The remark field size has been decreased to not allow more than this many characters.

**Related to:** A remark, appointment or task can be added to this related record from this screen

Much of the **Record Information** is automatically updated by the software:

The Date/Time Created      Date/Time Edited

Created By      Edited by

Check to make a record **inactive.**

By default Remarks cannot be edited and cannot be deleted. Although the Remark cannot be edited or deleted it can still be marked Inactive or Use as Template in Project Manager. This can be changed on the Project Manager *Utilities>System Options>Project Manager>Remark>Allow Users Without Administrative Rights to Edit and Delete*. Users with Administrative rights will be able to edit and delete Remarks regardless of this setting.

Choose the **Viewing Rights** as either **Private** or **Public**.  If a record is marked Private, it will be private not only to the “Created By” user. It includes the user that the item is assigned to.

This has the effect of creating a private record between the Created By user and the Assigned To user.

This is very important as each person will be able to view only their own private records plus all public records.  If a record begins as public only the record creator or the administrator can change it to private.

Check **Use as Template** to make this information available for creating future items.  The **Remark Type** and **Remark** will be saved as the template.

See Global to add remarks for multiple records.

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# Alerts

*Project Manager>File>Alert or **Alert** button on tool bar*


These keep salespersons abreast of the progress of orders or to serve as reminders. System generated alerts are defined in set up. An alert can also be manually entered.

## Browse Alerts

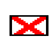
**Search Fields:** This will search the fields in the alert for the value typed. Click the button to the right to change from **Contains** to **Starts with**.

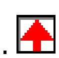
**Date Created:** Use the drop down list which includes today, this week etc.

**Assigned to/created by:** Set the default for this in System Options

**User Created/System Generated:** In addition to the filters included for other record types, alerts can also be filtered based on whether they were created by a user or system generated.  System generated alerts have a computer next to them in the browse. 

**Assigned to/created by:**
When filtering by Assigned to, alerts will display if they are EITHER 1) Assigned To the filtered user and the Assigned To Status = Accepted/Requested OR 2) Created By the filtered user and the Assigned To Status = Declined/To Be Assigned.

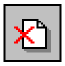
If included in the filter:
**Assigned to Status = Requested** a Green Question mark will display. 
**Assigned to Status = To Be assigned** a Blue Arrow will display. 
**Assigned to Status = Declined** a red x will display. 

**High Priority Alerts** will have a red arrow displayed next to them. 
Inactive or completed alerts will be listed in gray. Completed or cancelled alerts are listed in blue. Uncompleted alerts will appear in red text on the workbench or in their browse screens if they are past due or are due today.
Data can be sorted by any of the column headings including date fields.

## From the Toolbar or Edit Menu

 Add a user generated alert

 Edit or View an alert

 Delete an alert

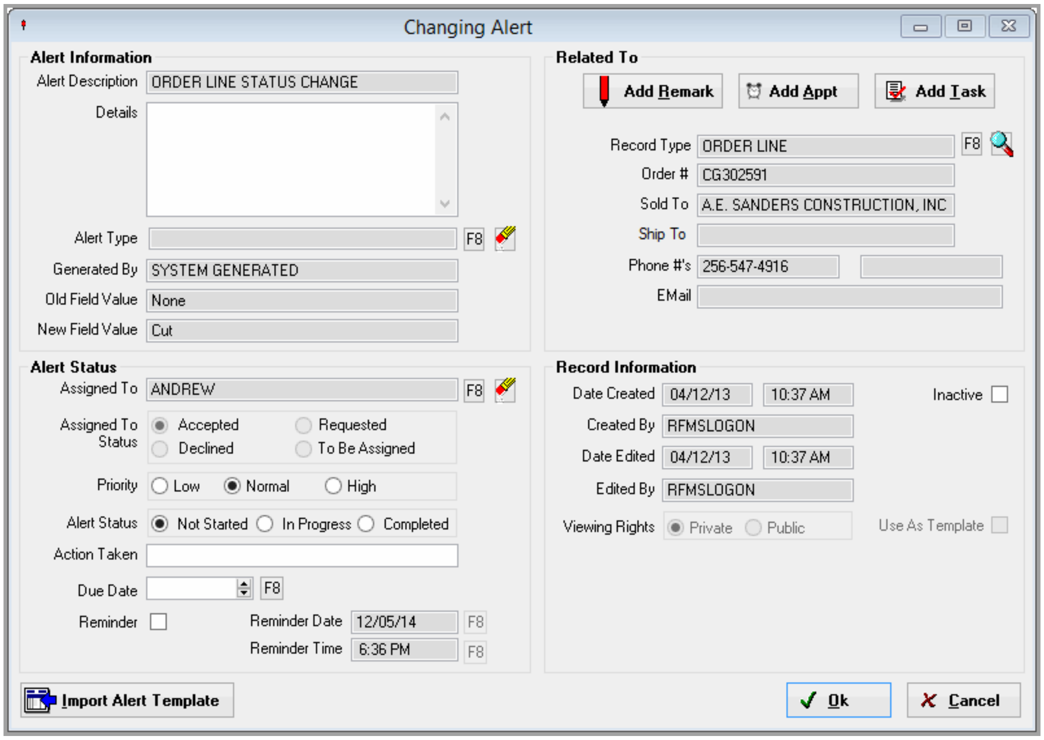



*Figure: Add/Edit Alert Screen*

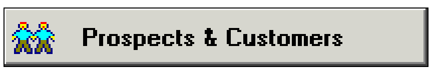
The **Alert Description** is required.
Next enter **details**.
**Alert Type:** F8 the Alert Types (Alert Types can be created and deleted here also)
**Generated by** will automatically either be system generated or user generated.
**Assigned to:** will default to the current user, but tasks can be assigned to other users.
The **assigned to status** will be completed automatically by the system depending on the user response.
System Generated Alerts will be assigned to the salesperson associated with the order which generated the alert.
Choose a **Priority**.
**Alert Status:** Can be Not Started, In Progress, Completed. In Progress is useful to let other users know that the alert is not being ignored. An alert must be marked completed manually.
**Action Taken:** Allows typing in any description.
**Due date** is optional. Alerts will appear in red on the workbench or in the browse screens if they are past due or are due today.
**Reminder** is optional for user generated alerts.

System generated alerts default to **reminder on** and the reminder date and time is set to the date the alert was generated and the reminder time will default to 8 AM.
**Related to:** optionally, choose a record to relate the alert to.
In a **system generated alert**, use the **View** button to see the details of the related record.

A remark, appointment or task can be added to this related record from this screen.
Most **Record Information** is automatically created by the system.
System generated alerts default to **private**, but user generated ones can be made **public**.
Check the box to make the alert **inactive.**
Check the box to use this alert as a **template.**

## Prospects & Customers

*Project Manager Module>File>Prospects & Customers or* ***Prospects & Customers*** *button on tool bar*




Prospects and customers have additional search fields not included for other record types. Below are the explanations of some of those fields:

1. The **Search Fields** entry (formerly called Enter Text) now searches the Contact 1 and Contact 2 fields as well as Customer, Business, Ship to Name, Ship to Business.
    a. Click the button to the right to change from **contains** to **starts with** depending on the search.
2. Prospects and customers can be filtered by **Address 1**.
3. Multiple **states**: enter the state abbreviation separated by commas.
4. User Defined Regions. See Zip Code Regions for information about defining regions. Region filtering will only look at first 5 digits of the prospect/customer zip code.
5. **Phone**: will search through all of the possible phone fields.
6. Can be filtered by **customer number**.
7. Multiple **Customer Types**: At the Customer Type field, F8 then tag the desired types.
8. Multiple **Prospect Types**: At the Prospect Type field, F8 then tag the desired types.
    a. To include most prospect types, tag all then untag the ones not needed.
9. **Salesperson**: A default Salesperson for this browse can be set in System Options.
    a. To see all salespersons click the reset button.
10. Prospects and customers can be filtered by **Ad Campaign**.
11. **Created by**: Set the default for this in System Options.
12. **Edited by:** find records changed by a certain user.
13. **Edit Date**: this will help find more current records.
    a. The recorded edit date on the record only refers to actual changes to the Customer/Prospect record not the create date or dates that other records or actions were related to the record.
    b. The filter includes changes made to the record as well as the date of other records or activities associated with the prospect or customer record.
14. It is possible to sort the data by any of the **column** headings including date fields.
15. If they are included in the filter, inactive records will be listed in gray.
16. A **Type** column has been added to the Prospects and Customer browse. **P** indicates the record is a prospect, **C** is a customer.

17. In Version 12.0 **Contact 1 and 2** were added to the browse list.

This screen allows not only the sold to and ship to and Additional information  that is available in RFMS, but also has fields for direct marketing. From here it is also possible to view the customer Notes from RFMS.

These options also available from *Project Manager Module>File>Prospects & Customers>Edit or **Prospects & Customers** button on tool bar>Edit*

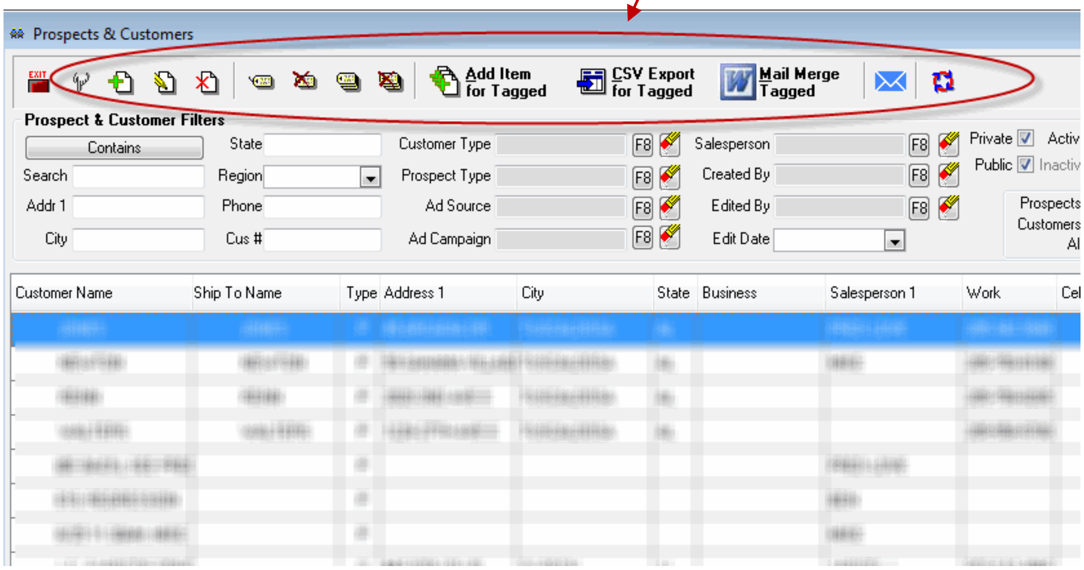



*Figure: Browse Prospect & Customers*

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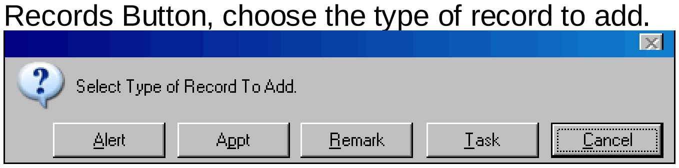
## Add for Tagged


While in the Prospects & Customers screen, a group of names can be tagged and a record (Alert, Appointment, Remark, or Task) added to the group.  After clicking on the Add for Tagged Records Button, choose the type of record to add.




Then the normal screen for that record will display.  If the record needs to be assigned to someone, it can be assigned to the person entered on the record, the Salesperson 1 from the filter screen or yourself.


*Figure: Global Assign*

## Export Records to CSV 


Use this to send records to a .csv file which can be sorted and edited for specific preferences. Use a csv file for printing labels, group emailing etc. with outside programs. The Selector Directory in the SAVE TO CSV FILE screen will default to the last selected directory for the user. Choose to send this export using upper and lower case letters by setting the option in System Options.
*>Utilities>System Options>Project Manager>General>Use Upper and Lower Case for CSV exports*

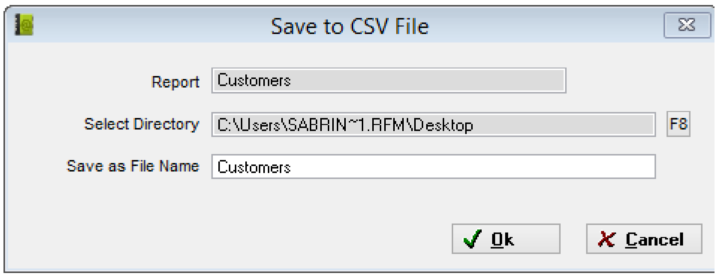
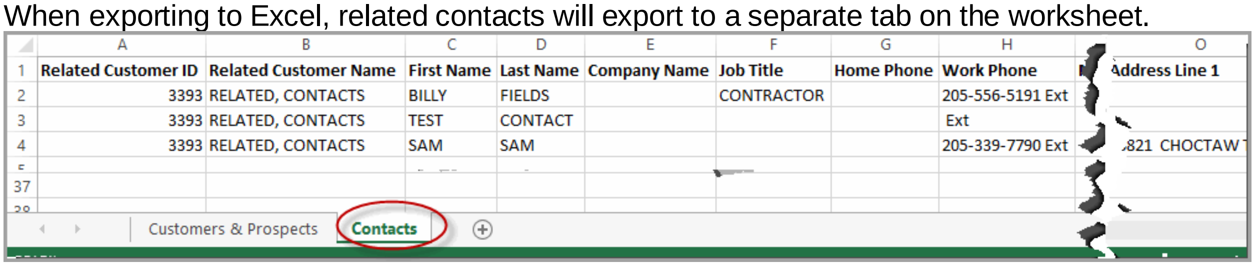



*Figure: Save to csv file screen*

Notes:

When exporting to Excel, related contacts will export to a separate tab on the worksheet.




The fields exported include:

| | | |
|---|---|---|
| Account ID | Prospect Type | Sold To Business |
| Ad Source | Record Type | Sold To City |
| Affiliation | Renewal Date | Sold To Country |
| Cellular | Salesperson 1 | Sold To Name |
| Contact 1 | Salesperson 2 | Sold To State |
| Contact 2 | Ship To Address 1 | Sold To Zip |
| Customer Type | Ship To Address 2 | Store |
| Date Created | Ship To Business | Tax Expiration Date |
| Date Edited | Ship To City | Tax ID |
| Email Address | Ship To Country | User 1 Field |
| Fax | Ship To Name | User 2 Field |
| Home Phone | Ship To State | Work Phone |
| Last Delivery Date | Ship To Zip | Yearly Volume |
| Last Order Date | Sold To Address 1 | Edit Date |
| Pager | Sold To Address 2 | |

## Mail Merge


Using this button, do a mail merge for letters or labels with a group of prospects or customers.

First use the Filters to narrow the group for sending the letter. For example, to send a letter to all Commercial dealers. Then tag the desired records. When the button is clicked a browse screen displays to find the merge document. Highlight the merge document and click on open. Then complete the merge in Word. For help with how to add fields and edit a MS Word Mail Merge document please go to the Microsoft online help. Choose to send this export using upper and lower case letters by checking the option in system options. *>Utilities>System Options>Project Manager>General>Use Upper and Lower Case for Microsoft Word Mail Merge*

## Add or Edit Prospect/Customer

RFMS has created a downloadable document which can be modified as a prospect information form. Click here for that form.

Add a prospect directly from here or through the Sales Lead module. It is recommended that before entering a new record, search to make sure there is not already a Prospect or Customer record entered. If there is one to add another person related to the existing record edit the Prospect or Customer record and add a related contact. If there are related contacts for this record, then the button text will be red.

When adding a prospect, if the first and last name fields blank are left blank, the Business name will be copied to the last name field when the record is saved.

This same screen is available from Search All/View Record while a prospect or customer record is highlighted.

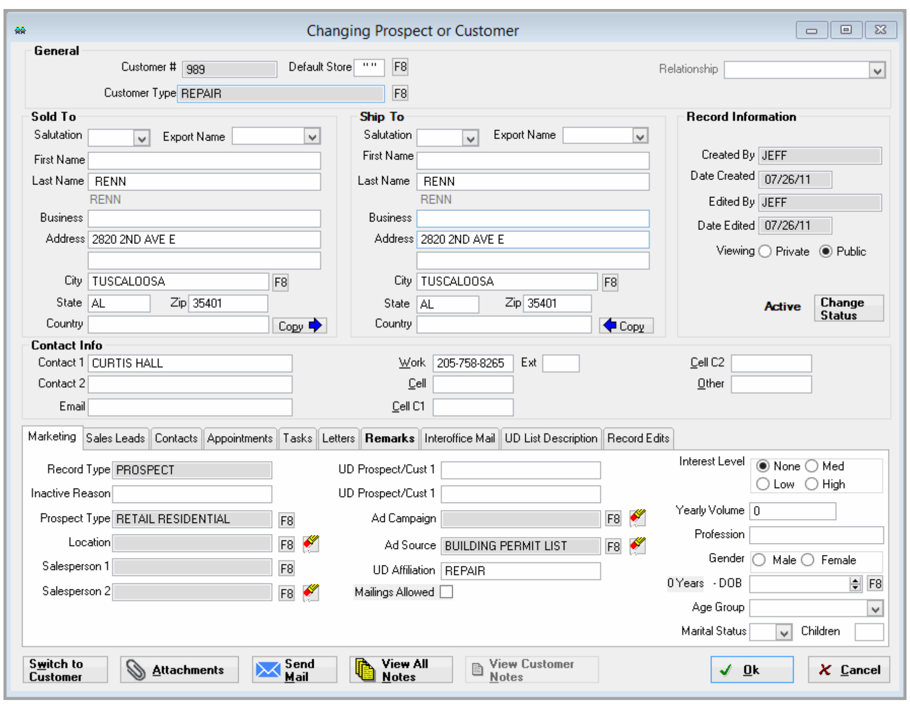



*Figure: Prospect and Customer Screen*

## Notes on Fields

**Salutation:** A value can be typed in here not which is not in the drop down list.
**Store:** To speed data entry the store number may be typed in or use F8 to choose a store.

If the status is changed from Prospect to Customer the record becomes a part of the RFMS Customer file. 

It is recommended only one person be responsible for doing this to ensure consistency in the RFMS Customer file. All Customers are Public. There are certain fields that cannot be edited on customer records from PM. These must be edited through RFMS. These include Addresses, Phone numbers, Email and Contacts. A record can only be added directly as a customer from RFMS Core.

If user defined prompts are set in Order Entry for **Telephone 1 & 2** they will be used in PM.

## Duplicate Checking

A warning will display on saving record if another record exists where the customer name contains the current last name and has the same Telephone 1 data. Answering yes saves the record as it is, answering no allows the current record to be edited or cancelled. The system will save the data entered and allow editing it. When confirming that a record is a duplicate, remember there may be another user's private record already entered.

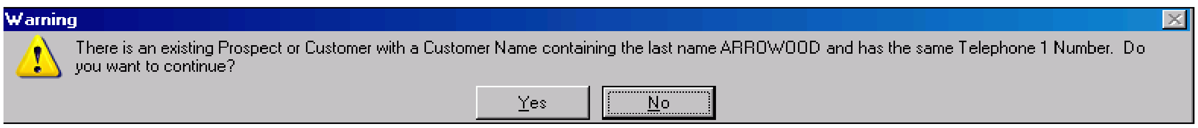
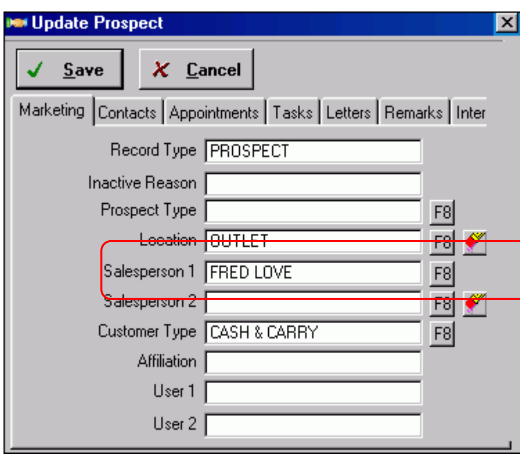



*Figure: Duplicate Record Warning*

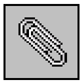
**Notes:** Multiple locations may have the same prospect in each location and those will not be duplicates.

## Default Values

When adding a new record the Location will default to the users Default Location if one has been selected in *Utilities>System Options>Project Manager>Sales Leads>Default Location for Manage Sales Leads*, the Salesperson will default to the User Settings "Link to Salesperson" if one has been selected in *Utilities>Project Manager Set Up>Users and Alerts>Update User Settings.*



## Attachments



Files can be attached to the Prospect & Customer record. This feature works the same as in RFMS Core. Click here for details. A number of different graphic picture formats can be attached. Supported picture formats are .bmp, .wmf, .pcx, .gif, and .jpg. This feature will also allow storing PDF files, Spreadsheets, Word documents and Measure Files.

## View All Notes & Remarks


The **view all notes & remarks** function is a very helpful tool that shows a consolidated list of all notes from Order entry and PM related to this prospect/customer. If the listing is too long it can be filtered by last edit date to only get the most recent notes.

The left side of the screen lists the available notes and the right side displays the detail of the note highlighted on the left. Highlighting a note in the list on the left gives the note details on the right. By clicking the **edit** button  it is possible to edit the note from this screen.

A password can be set on this function either from PM or Order Entry and will be valid in both places.

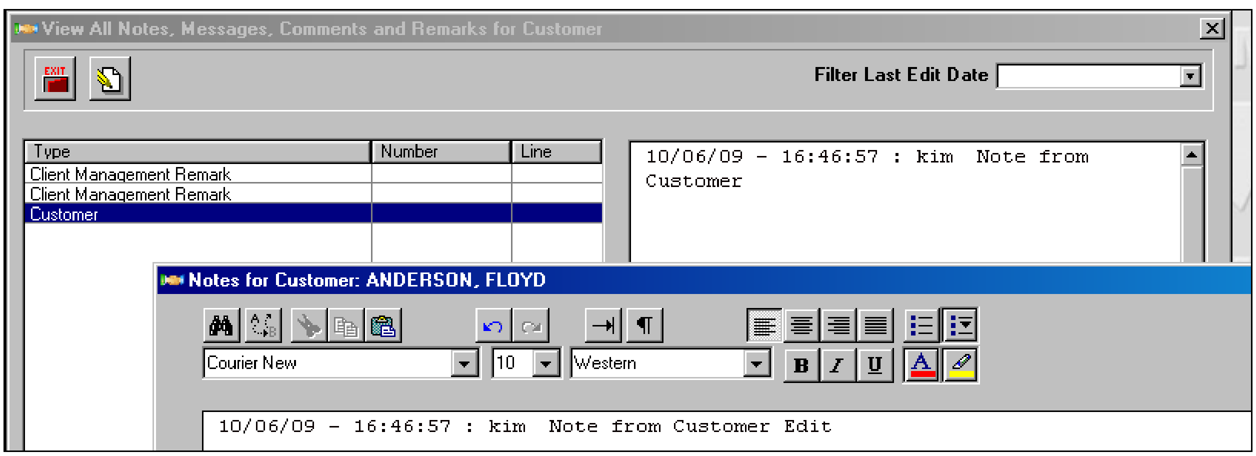



*Figure: Example View all Notes*

## Branch and Main Relationship

The ability to track Branch and Main relationships for Prospects & Customer Records has been added. Click here for details. Currently the associated branches cannot be seen from PM.

## Record Information

The recorded edit date on the record only refers to actual changes to the Customer/Prospect record not the create date or dates that other records or actions were related to the record. The dates for these records are on the records themselves.

## Tabs

The text on the tabs will display as follows:

If there are no records or all the records are inactive then it will be regular black text. See Remarks.
If there are active records then the text will be bolded. See **Contacts.**
If there is at least one active record that is not completed and is high priority then the text will be red bold. See **Letters.**
If there are no high priority active records and at least one that is not completed then the text will be bold black. See **appointments.**

If all the active records are completed then the text will be bold blue. See **Tasks**


## Marketing Info

The first field here changes depending on the record type: If it is a **prospect Status:** will be either prospect or customer; if the record is a **customer,** this will say **record type.** This is to prevent confusion of an active or inactive "status" on a customer.

**Inactive Reason:** If a record is unchecked as active, (see circled area) this field allows giving a reason

**Prospect Type** Define what to use here during system set up. See Prospect Types

**Location**: This pulls from the possible locations listed in the SALES LEAD system, this does not pull from the RFMS store codes. If a location has been used in the Salesperson Sales Lead list, do not delete it but instead make it inactive.

**Salesperson1 and 2** pull from the RFMS salesperson list if entered directly as a prospect or customer, if entered from SALES LEADS only those entered in the SALES LEAD system will be available.

**Customer Type:** Pulls from the RFMS Customer type file

**Affiliation:** This could be used for groups that leads are received from such as the Homebuilders Association or a Mortgage Company; define this and the next two fields.

**Rating:** Define what these mean internally.

**Yearly Volume:** This number is manually input, not calculated. Decide internally how to represent this number i.e. would one half million in sales be 500,000 or .5. Some suggestions for use of this field would be either the company's annual sales volume or the revenue they generate yearly.

**Ad Campaign:** Pulls from the list added in ad campaign set up; this would be the event that causes them to come to the store, for example Labor Day Sale.

**Initial Ad Source:** Pulls from the list in RFMS order entry; this would be the way they heard about the event. For Example Direct Mail Campaign.

**DOB:** When this information is entered, the age group will be auto filled.

**Contact 1 and 2:** Pulls from RFMS Customer information or can be added here. Contact 1 is used as the name above the inside address on a **letter**.

## Additional Customer Information

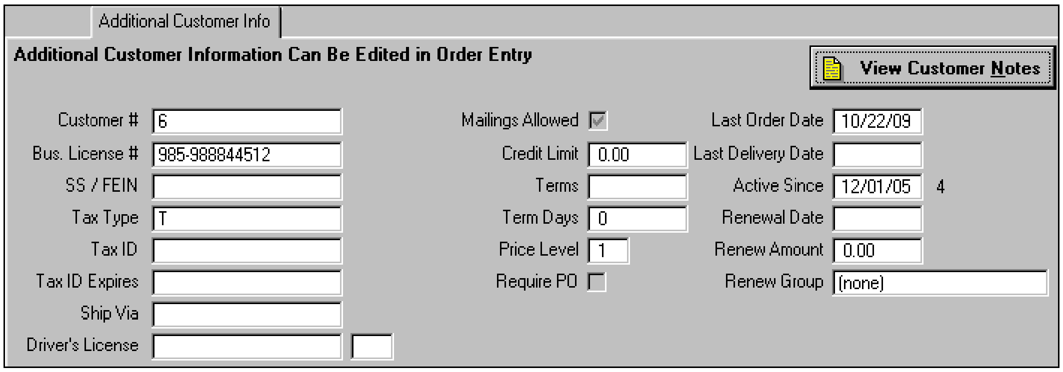
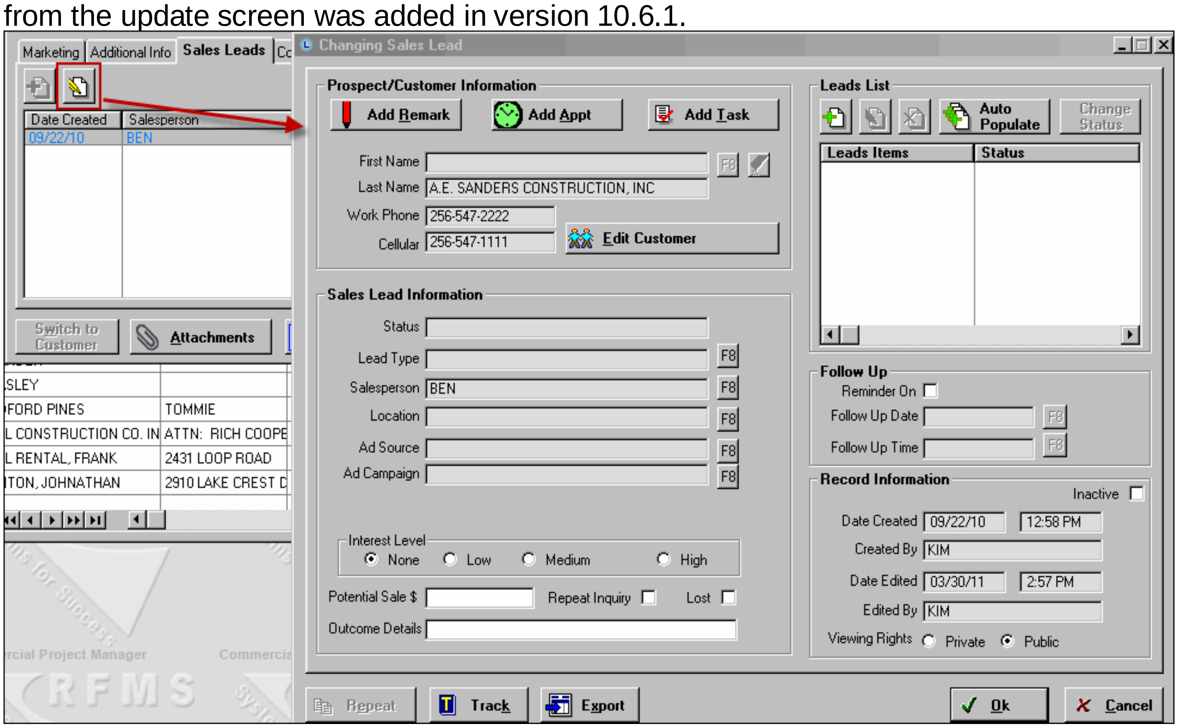



*Figure: Additional Customer Information Tab*

This screen which is available only for customers not prospects shows Additional information that is available in RFMS. From here it is possible to view and edit the Customer Notes from RFMS.

## SALES LEAD

The ability to view and edit Salesperson Sales Lead records related to the Prospect/Customer from the update screen was added in version 10.6.1.



The color coding in this list is the same as in the SALES LEAD browse list.

Inactive – Gray (Must be marked inactive on the Sales Lead record)
Completed - Blue (Status = Order or Lost)
High Priority - Red (Follow Up = True and Date is Today or Past Due)

## Prospect & Customer List Tab

A User Defined List can be set up for prospects & customers. This is a separate list from the one set for Sales Leads.

*Utilities>Project Manager Set Up>Customer User Defined Items*
Set up the items in the list. When creating the list remember there will be up to 6 status choices for these items. These items will be listed alphabetically, so numbering them is one way keep them in a logical order. If items are added and the list needs to be renumbered, the system will automatically change the names already in use.

***Some example list items:***

1. Carpet
2. Vinyl
3. Ceramic
4. Hardwood
5. Laminate
6. Cleaning
7. Anniversary Letter
8. Loyal Customer Letter

*Utilities>System Options>Project Manager>Sales Leads>Prospects & Customers*
Set up the name for the list.

***Example: Customer Check List***

Set up the name for the items list

***Example: Items***

Set up the status choices including the default status.

***Examples:***

Default: Yes
Status 1: No
Status 2:
Status 3:
Status 4:
Status 5:

If a status choice is changed the new label will apply to any records where that choice has previously been used. For example if choice 2 was changed from no to maybe, anything already set to no will be changed to maybe.

The Auto Populate button will add **all active items** in the list to the customer or prospect with the **default** status. Change Status will toggle through the statuses set up. In the example above click **change status** once to change from the default yes to status 1 no.

Here is the example list auto populated and then in progress:

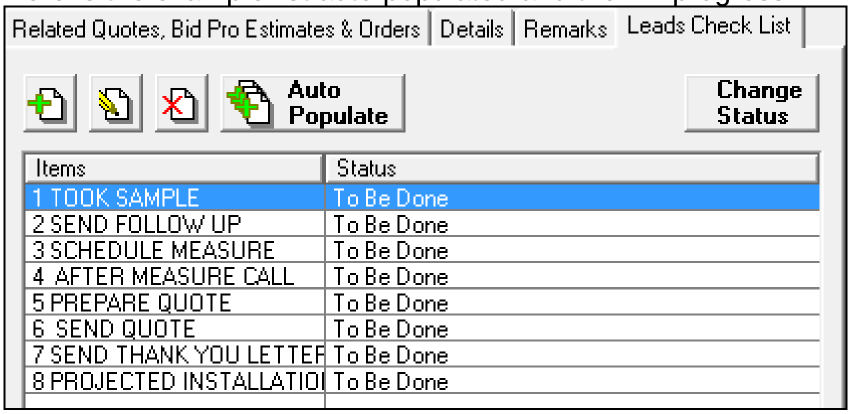



*Figure: User Defined List Auto populated*

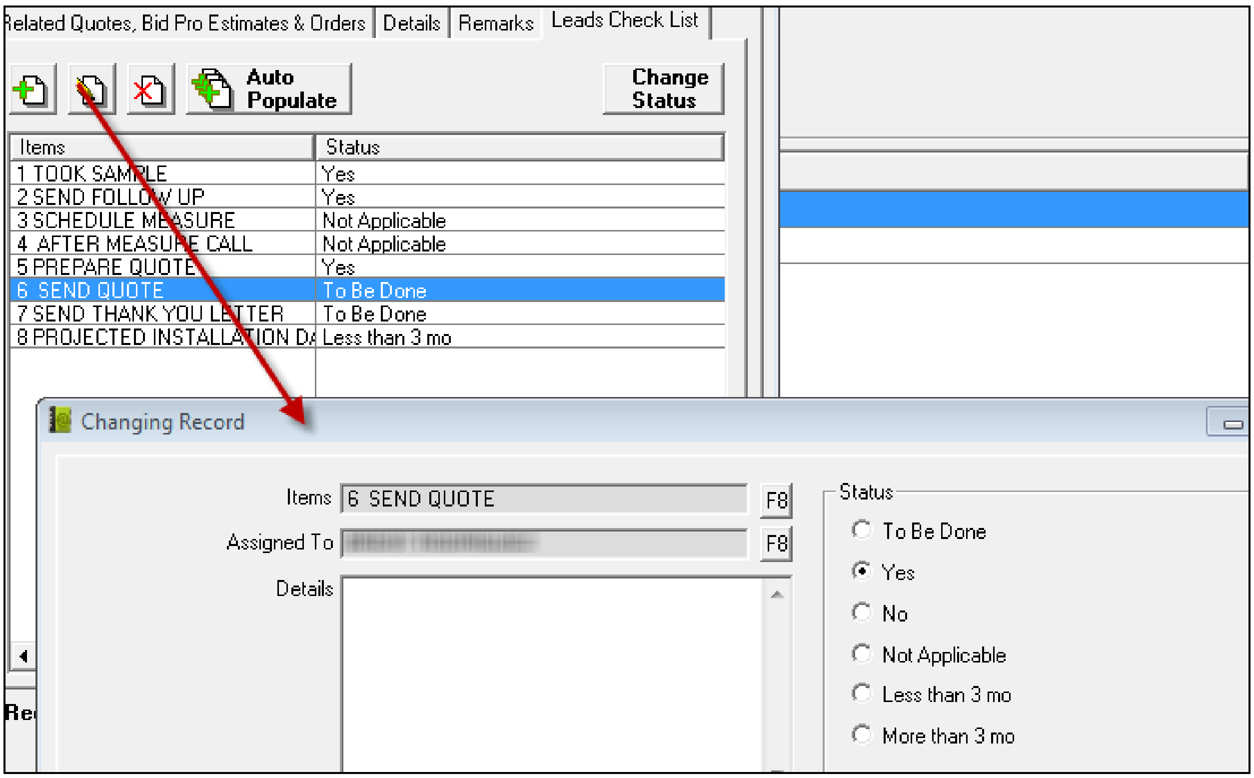


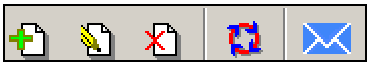

*Figure: User Defined being edited*

# Contacts

*Project Manager Module>File>Contacts or Contacts button on tool bar*


A Contact is an individual person, who can be related to a Prospect or Customer, like a Purchasing Agent who works for a builder, or a non-related Contact, like a Mill Rep. This contact can be related to any type record accessible from PM. This screen gives a quick view of all current activity related to the contact. If included in the browse, inactive contacts are listed in gray. The data can be sorted by any of the column headings including date fields.

## From the Toolbar or Edit Menu



Add/Edit/Delete Reset Filter Send a mail message.

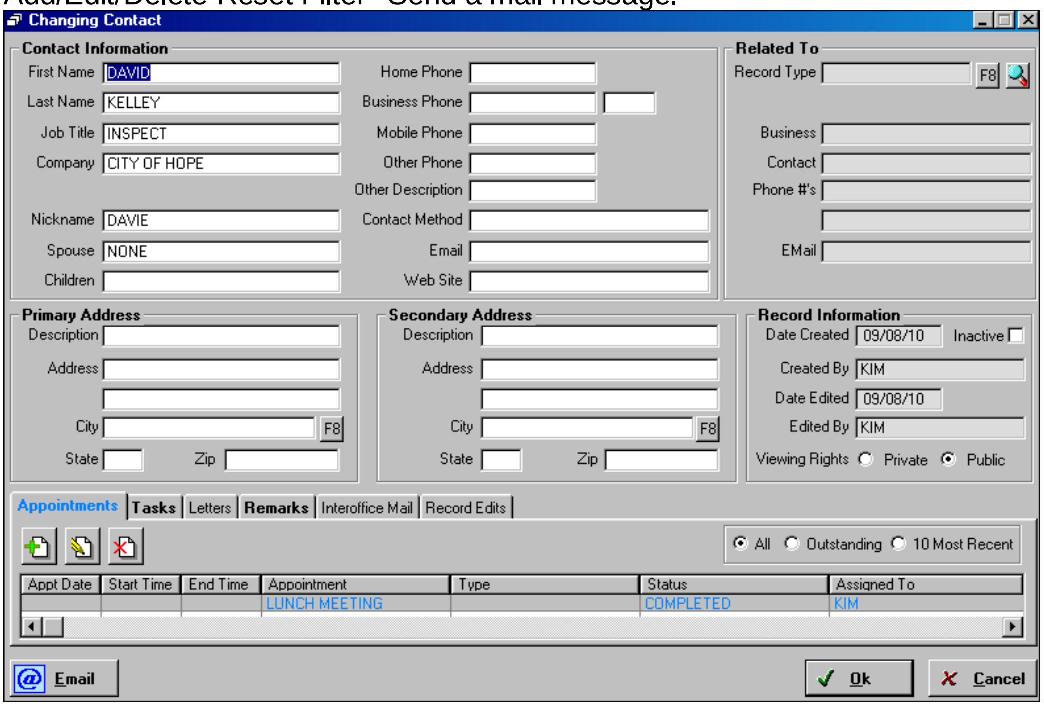



*Figure: Contact Screen*

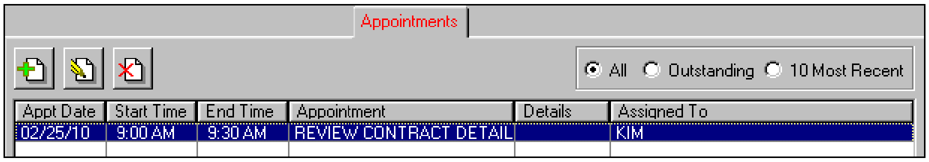
## Contact Tabs

The text on the tabs will display as follows:

If there are no records or all the records are inactive then it will be regular black text. See Remarks.
If there are active records then the text will be bolded. See example **Appointments.**
If there is at least one active record that is not completed and is high priority then the text will be red bold. See example **Letters.**
If there are no high priority active records and at least one that is not completed then the text will be bold black. See example **appointments.**

If all the active records are completed then the text will be bold blue. See example **Tasks**

## Appointments/Tasks/Letters/Remarks




These tabs tab shows all related items to this record. Filter to see just the outstanding items or the 10 most recent items. An item can also be added/edited or deleted from this tab.

## Interoffice Mail

Sending new and viewing previously sent mail related to this prospect or customer can be done from this tab

## Record Edits

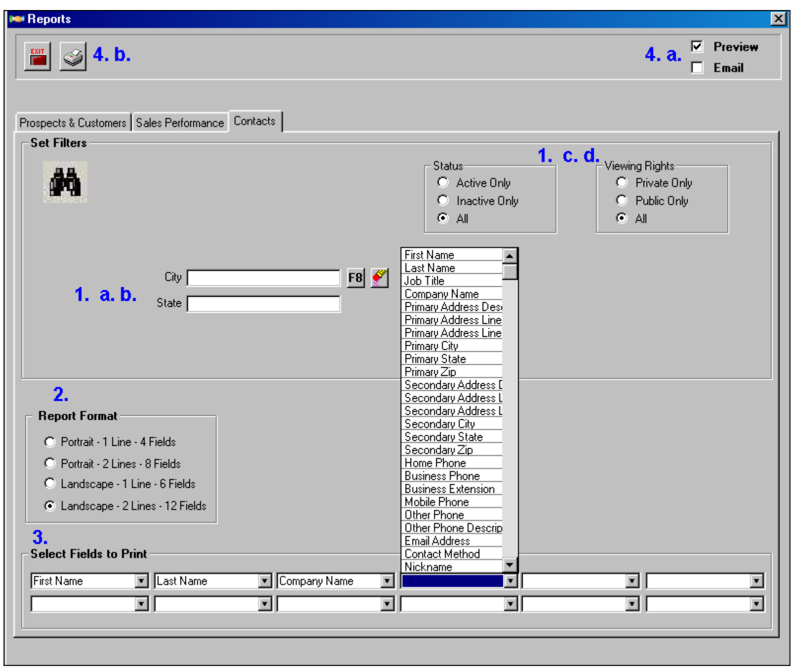
If using the RFMS Enterprise manager, any tracked edits related to this record will be listed here.


---

## Contacts Report

*PM>Reports Button>Contacts Tab*

This is a report for PM contacts.



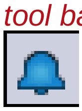
1. Filter the contacts to be included. Filter by:
    a. City
    b. State
    c. Status: Active/Inactive/All
    d. Viewing Rights: Private/Public/All
2. Choose the Format:
    a. Portrait 1 Line-4 Fields
    b. Portrait 2 Line-8 Fields
    c. Landscape 1 Line- 6 Fields
    d. Landscape 2 Line- 12 Fields
3. Choose the Fields to include on the report.
    a. The number of fields available depends on the format chosen above.
    b. Use the arrow to display a pick list of available fields.
4. Choose the report output.
    a. Choose to Preview and/or email the report
    b. Select the print button and then choose the type of output.

## Projects

*Project Manager Module>File>Projects or Projects button on tool bar*


## Project Workflow Actions

*Project Manager Module>File>Project Workflow Actions or Project Work Flow Actions button on tool bar or Projects>Select Project>Project Work Flow Actions button*

 or 


Workflow actions do more than just “remind” the user, they actually drive a project’s workflow by specifying when certain actions should take place.

There is also a Project Work Flow Actions mini-browse Screen Work Bench.

The Action Dates will change over time as the Lead Date changes. Action records will display even if the Lead Date currently does not exist.

From this screen, the action can be completed, a task can be added or another project specific reminder can be added. Adding a task for this action does not complete the action.

When an action is completed a record is saved to the Document History. A PDF document can also be attached to the record for viewing. Completed actions and the attached PDF File can be viewed on the document history tab in the Update Project Data screen. Once the PDF

File is saved with the document history record it can always be recreated and viewed. Any document type which can be saved as a pdf file can be attached here. Some examples are word documents and excel files.  The system defaults to looking for the pdf file in your RFMS directory, but pdf files from other locations can be attached.

These pdf files can then be viewed from the document history tab on the project record.

Project Work Flow Actions can be set be automatically created based on the Project Type and a specific date associated with the project.  Click here for details.

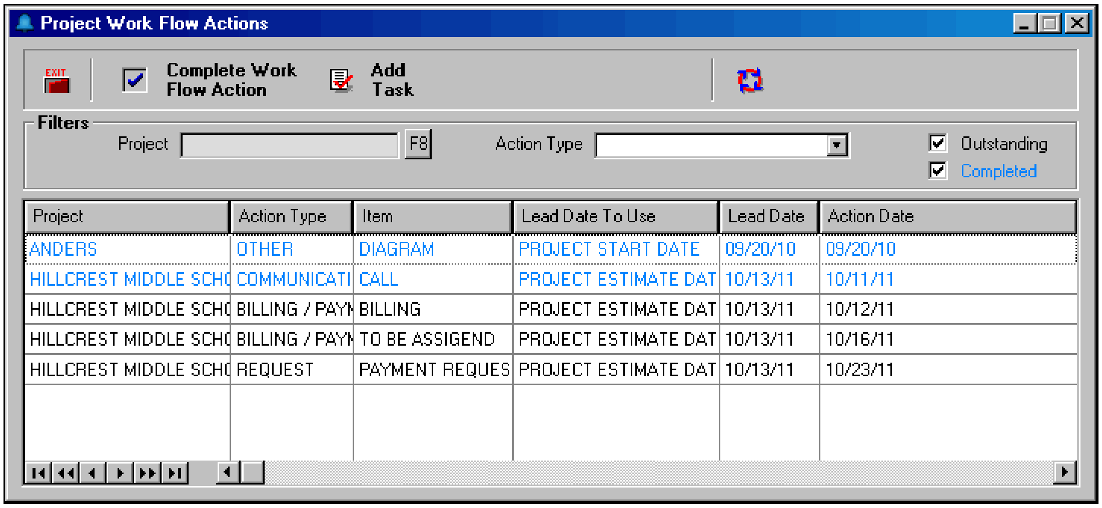



*Figure: Project Work Flow Actions Browse Screen*

This screen can be minimized and left open it will update automatically. Or it can be turned off in *Utilities>Public Parameters & Set Up*

## Editing a Work Flow Action

The information from the set up work flow action is automatically brought into the specific workflow action and only the circled information can be edited.

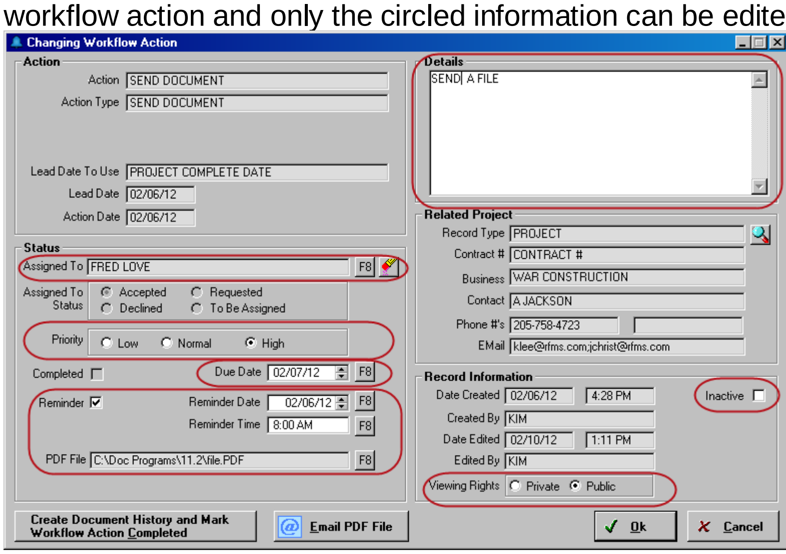



*Figure: Workflow Action Record.*

### Field Definitions:

**Action -** Defaulted from Workflow Action Set Up Record, Read Only.

**Action Type -** Defaulted from Workflow Action Set Up Record, Read Only.
**Outcome Record Type -** Depending on the Action Type this will be either Appointment Type, Letter Type, Task Type, Remark Type or Report Type. Prompt will change accordingly. Defaulted from Workflow Action Set Up Record, Read Only.
**Template Name-** Letters and Reports only Defaulted from Workflow Action Set Up Record, Read Only.
**Lead Date To Use -** Description of Lead Date. Defaulted from Workflow Action Set Up Record, Read Only.
**Lead Date-** Actual Lead Date, Read Only
**Action Date-** Date that the User should begin working on the workflow Action. This is automatically calculated based on the Lead Date to Use and the Lead Days in the Workflow Action Set Up record, Read Only.
**Assigned To -** Defaulted from Workflow Action Set Up Record, can be edited.
**Assigned To Status -** Follows the standard Project Manager rules for Requested, Accepted, Declined and To Be Assigned. This can be edited.
**Priority -** Low, Normal or High - High Priority will mark the records in browses with Red Up Arrow. This can be edited.
**Completed -** Must use the ***Complete Workflow Action*** button to complete the item. Once it is completed, the reminder will be turned off and it will no longer appear as an outstanding record on the Workbench Workflow Action browse. See Details below.
**Reminder, Reminder Date, Reminder Time -** This can be edited but is automatically set to 8:00 AM of the day before the Action Date - This will cause it to display in the Reminders window, allow snoozing and will be treated just like any another reminder.
**Due Date -** Date that the User needs to complete the workflow action by. This can be edited.
**PDF File -** For Action Types = SEND DOCUMENT, this is the PDF File that will be attached to the Document History. It is also used with the Email PDF button. Defaulted from Workflow Action Set Up Record, can be edited.
**Details -** Defaulted from Workflow Action Set Up Record, can be edited. This will also transfer to any action records created upon completion.
**Related To Information -** This is the record that the Workflow Action is related to.
**Outcome / View Outcome -** Displays what happened upon Completion of Workflow Action. The View button will open the corresponding Outcome record (i.e. the Appointment, Task, Letter, Remark, Document History record).
**Complete Button -** Completes the Workflow Action.
**Email PDF Button -** For Action Types = SEND DOCUMENT, allows the user to email the attached PDF File.

### Completing a Workflow Action
Click the ***Complete Workflow Action*** Button - This following will happen upon completion.

Complete the Work flow action record and turn off its reminder.

An Outcome Record will be related to the Workflow Action record for Action Types Appointment, Task, Letter, Remark and Send Document.
If the Workflow Action is assigned to the User who is completing it and the status is requested, it automatically sets it to Accepted. If the Workflow Action is not assigned to the User who is

completing it then a message will display stating that it is assigned to someone else and will not be completed.
Once the Workflow Action record is completed, then it is automatically saved so that if the user leaves the screen without saving the changes will not be lost.

Additionally the following will happen based on the Action Type:

**Appointment:** Creates an Appointment record with a Reminder set to 8 am on the Action Date. The Appointment Date will be defaulted to the Action Date from the Workflow Action record. The Appointment will be defaulted to the Action from the Workflow Action record. The Appointment will be defaulted to the same Appointment Type, Assigned To User and Details as the Workflow Action record.

**Task:** Creates a Task record with a Reminder set to 8 am on the Action Date. The Task will be defaulted to the Action from the Workflow Action record. The Start Date will be defaulted to the Action Date from the Workflow Action record. The Task will be defaulted to the same Task Type, Assigned To User, Due Date and Details as the Workflow Action record.

**Letter (With Template):** Creates a Letter record with a Reminder set to 8 am on the Action Date. The Letter will be defaulted to the same Assigned To User and Due Date as the Workflow Action record. Letter Type and all Letter fields will be defaulted to the Workflow Action record's Letter Template.

**Letter (No Template):** Creates a Letter record with a Reminder set to 8 am on the Action Date. The Letter will be defaulted to the same Letter Type, Assigned To User and Due Date as the Workflow Action record. Regarding and Title will be defaulted to the Action from the Workflow Action record. The Content will be defaulted to the Details from the Workflow Action record.

**Remark**: Creates a Remark record. The Remark will be defaulted to the same Remark Type and Details as the Workflow Action record.

**Report:** Opens the Project Report Screen for the related Project record to the appropriate tab based on the Workflow Action record's Project Report Template. Once the report is successfully printed a document history record will be created with a pdf copy of the report. This will be viewable from the Workflow Action.

If a Proposal, Change Order, Transmittal / Submittal, or Request is successfully printed outside of Workflow Actions then the user can choose to save it to the document history or not.

**Send Document:** Creates Document History record for related record. If a valid PDF file is attached to the Workflow Action it will be stored with the Document History record. The Document History record will be defaulted to the same Details as the Workflow Action record. E-mailing the document from the workflow action record does not complete the action.

**Change Status:** Automatically updates the Status of the Project based on the Workflow Action settings.

**Other:** The workflow action is marked completed.

**Note about Work Flow Actions and Projects Relationships:**
Because of the automatic updating of these records, as work flow actions are added or edited, projects of the associated type are automatically updated with the new work flow actions or existing actions are edited/deleted/made inactive if they are outstanding. If ***Automatically do Outcome on Action Date*** is checked on the Workflow Action Set Up record the Workflow Action will automatically be completed in certain situations. This applies to Action Types APPOINTMENT, TASK, LETTER, REMARK and CHANGE STATUS.
So a person working on a project could see changes they did not put into effect if another user is managing the general work flow actions and if work flow actions are set to automatically create other records such as appointments, letters or tasks could be created.

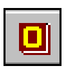
Also changing the project itself especially the dates could cause changes to that project's work flow actions.

**Reminders & Requests**
Workflow Actions will now follow the same Assigned to Request, Accept and Decline rules as other items in Project Manager. Therefore they will display as a Request for the Assigned to User until it is either Accepted or Declined. If it is declined then it will continue to show on the Created by Users screen as Request Declined.

---

# Order History

*Project Manager Module>File>Order History or* ***Order History*** *button on tool bar or Projects>Additional Related Records Order History*



This allows viewing all RFMS records related to the record chosen. In this search select a record type and enter the whole number including the prefix CG, ES or CL, or use the F8 button to search and find the desired record.

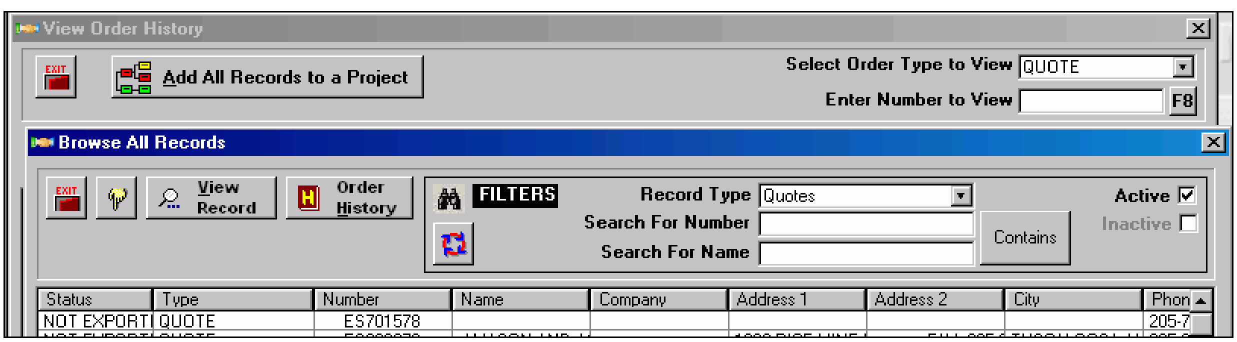


*Figure: Browse all records via F8*

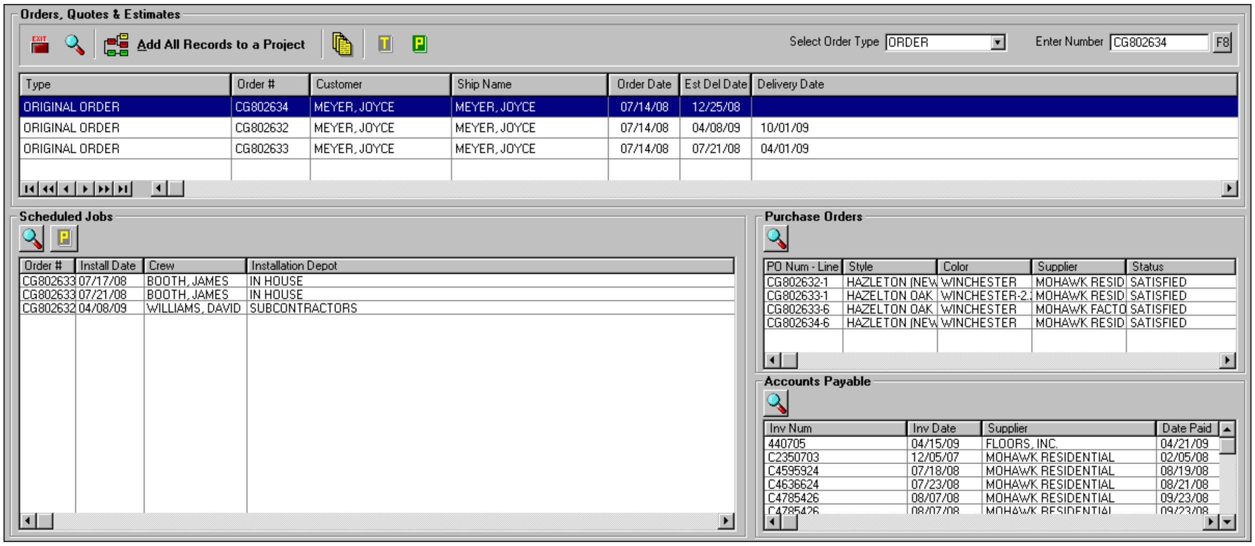



*Figure: View order History*

Clicking the **Add All Records to a Project** Button will add all records on the screen i.e., the order and the purchase order, scheduled jobs and accounts payable records to the project you select.

Notes: The notes cannot be filtered by date here as they can from Prospects and Customers. Data, other than notes, which originated in RFMS, cannot be edited here in PM.

## Orders, Quotes & Estimate Options

Highlight one of the records and click the **View record** button to see more details.

Highlight one of the records and click the **View All Notes** button.

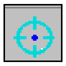
Highlight one of the records and click the **View Order Tracking** button.

Highlight one of the records and click the **PDF History** button.

If the order is part of a Billing Group, all the orders of a billing group will be displayed with a BG as part of the order type.

# Search All

*Project Manager Module>File>Search All or **Search All** button on tool bar*



From here search all records accessible by PM.  Use the selection list to designate the type of record. Then use the search by fields to further specify the information. If they are included, inactive records are listed in gray.

If the specific record type is not known, use the search by field. For example, to look for Mr. Harris' information but are not sure if he is a contact or a prospect, leave the filter by field blank and just enter Harris in the name.

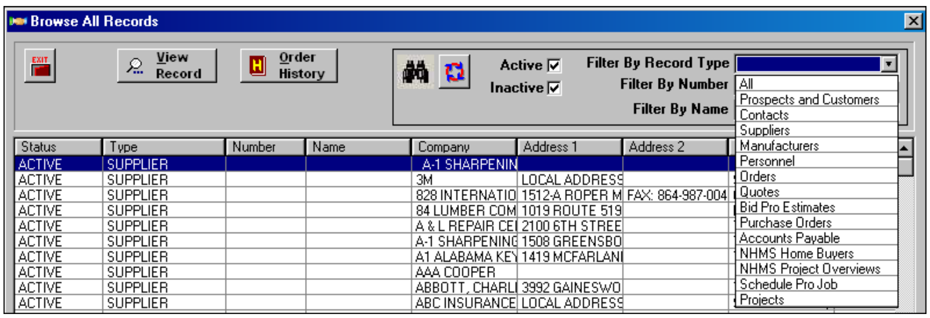



*Figure: View All Screen*

The View Button  allows viewing the detail of that related record. If it is a record created in PM (for example a contact record) editing can be done from that screen, otherwise (for example an RFMS Order) it can only be viewed.

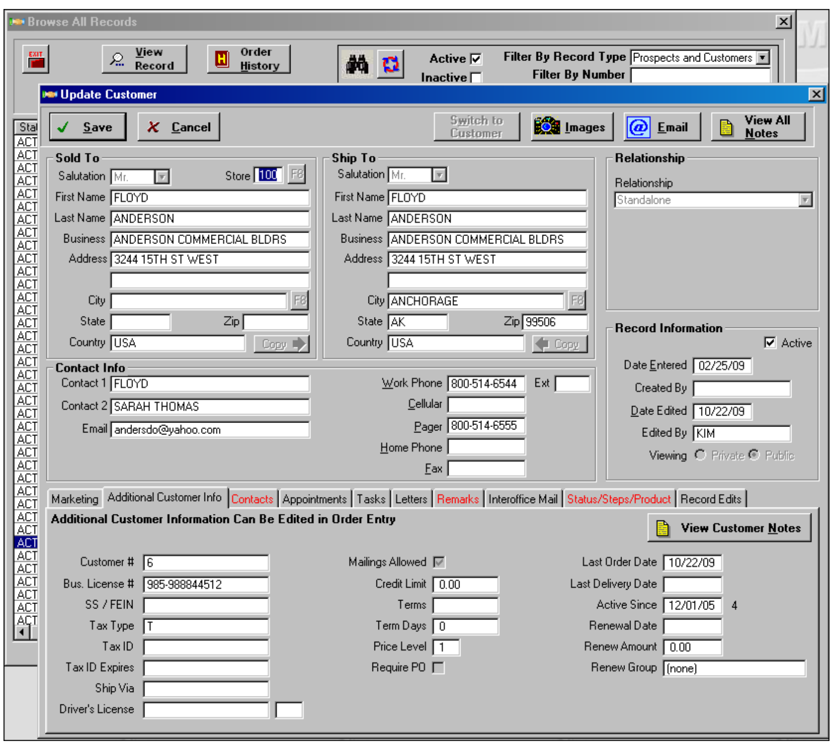



*Figure: View Additional Customer Information*

If viewing an order or quote, the header notes as well as the individual line notes are visible. Click to see more details View Order.

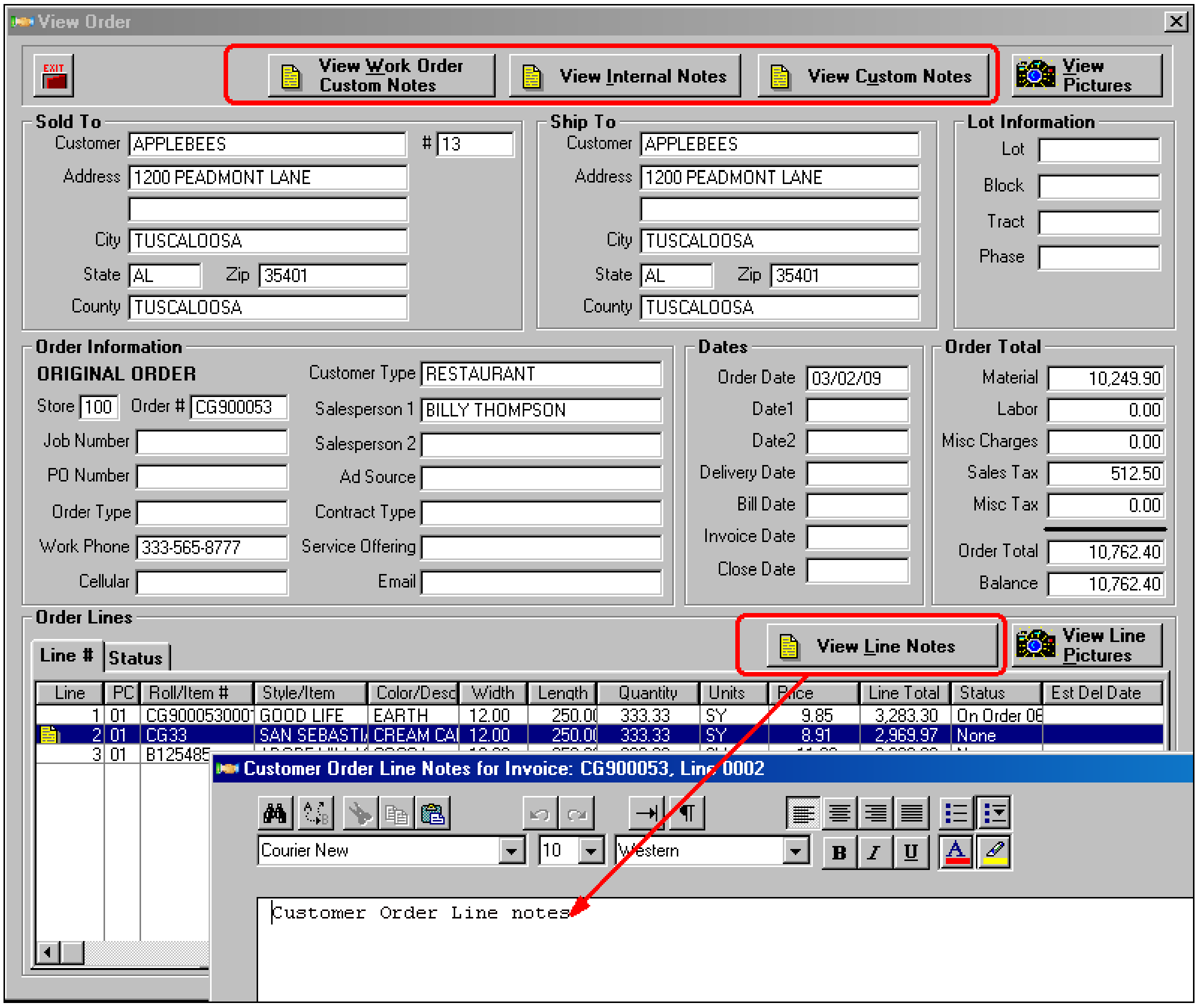



*Figure: Example of Customer Order Line Notes*

# Reports

*Project Manager Module>File>Reports or **Reports** button on tool bar*


Reports for all areas of PM except Projects will be accessed from this button. Any report which allows filtering by salesperson, allows multiple salespersons to be chosen. Use the **F8** key to bring up the list of salespersons and tag which one or ones to include.

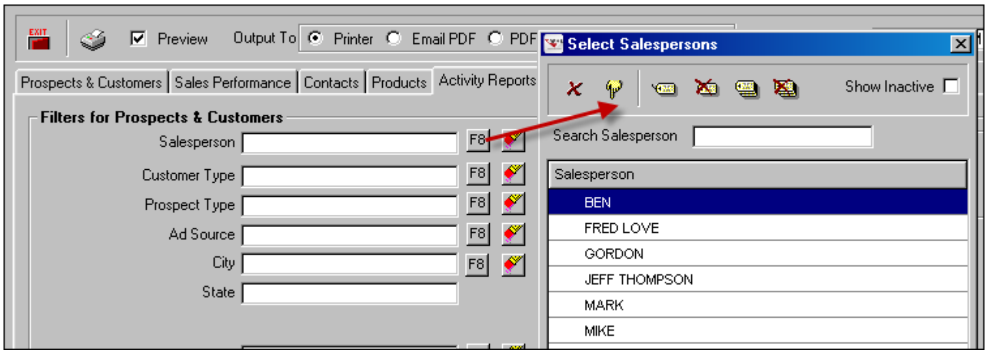



*Figure: Reports Screen*

## Output Options

**Preview:** Checking this box allows previewing output before saving or printing it.

**Output to:** Chose an option as described in the chart.


*Figure: Output Options*

| Output Options | |
|---|---|
| Printer | Prints a hard copy to the default printer |
| Email PDF | Opens an outlook mail message with the report attached as a .pdf file. A copy of the report is also saved to the location listed in the output directory field. |
| PDF | Allows saving the report as a pdf file to a chosen location. |
| MS Word | Allows saving the report as a Word Document to a chosen location. |
| MS Excel | Allows saving the report as a spreadsheet to a chosen location. |

The option will be executed after the **print** button is clicked.

**Output Directory:** Choose a location to save pdf, word and excel files created.

Create a directory for saving files to make finding and deleting old files easier.

Any report which allows filtering by salesperson, allows multiple salespersons to be chosen. Use the **F8** key to bring up the list of salespersons and tag which one or ones to include.

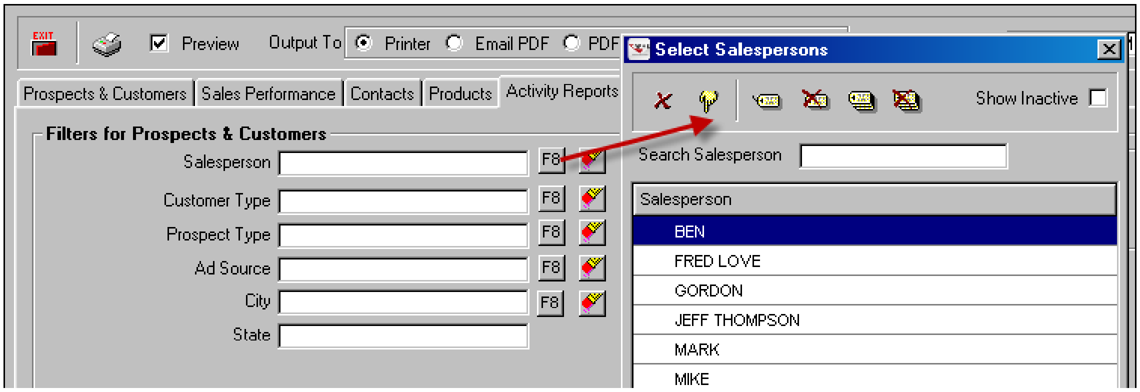



*Figure: Reports Screen*

## Sales Performance

*File>Reports>Sales Performance Tab or Reports Button* 

Using the check boxes, more than one report can be generated at a time.

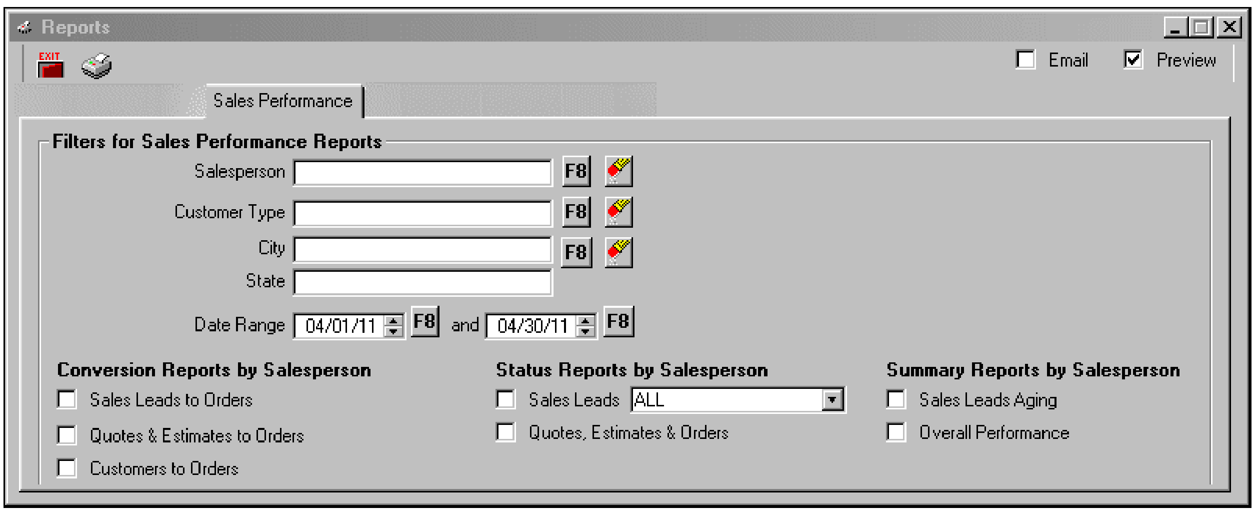



*Figure: Sales performance report options.*

## All Report Options

**Email:** Check this box to Email output as an attachment. This will automatically bring up email software after the output type has been saved

**Preview:** Check this box to preview the report before outputting it. When previewing the report, click the button with a red x to skip outputting it or click the printer button to get the desired output.

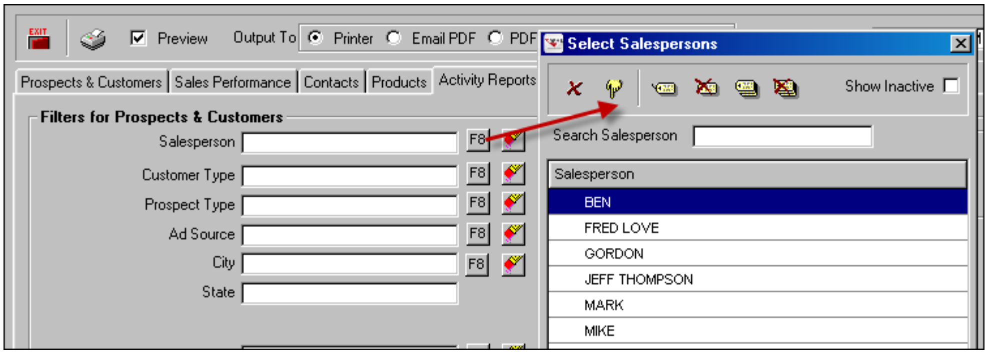
## Sales performance report options

Click **F8** to see the list for the next 3 fields, click the **select** Button when the desired option is highlighted.

**Salesperson:**

If there is more than one Salesperson on a quote, estimate or order reporting will be for Salesperson 1 only.

Use the **F8** key to bring up the list of salespersons and tag which one or ones to include.




**Customer Type:**
The Customer Type from the Order, Quote or Bid Pro Estimate will be used where applicable. Otherwise the Customer Type from the Customer record will be used.

**City:**
Sold To City will be used from the Order, Quote or Bid Pro Estimate will be used where applicable. Otherwise the Sold To City from the Customer record will be used.

**State:**
Type in the state abbreviation; Sold To State will be used from the Order, Quote or Bid Pro Estimate will be used where applicable. Otherwise the Sold To State from the Customer record will be used.

**Date Range:**
Customer (Prospects) - Customer Date Created
Sales Lead - Salesperson Sales Lead Created Date
Orders, Quotes & Estimate - Order Date, Quote Date, Bid Pro Estimate Date
To include all records set this to 01/01/80 and 12/31/79.

**Sort Order:** Sales Performance reports are sorted by Salesperson.

## Report Fields

**Average:**
NOTE: A group of Related Quotes or Sub Estimates will only count as 1 unless multiple orders have been created for the group. For example, if there are 4 related quotes and 1 has been exported to an order then the Quote & Estimate Count will be 1 and the Order Count will be 1. If there are 4 related quotes and 2 have been exported to orders then the Quote & Estimate Count will be 2 and the Order Count will be 2.

**Lost:** For a sales lead to be considered lost it will need to be marked on the record or meet the criteria set for a lost lead in *Utilities>System Options>Project Manager>Sales Leads>automatically move Sales Leads to Lost after # of Days (Feature is Inactive if 0).*

These reports will break on salesperson.

## Conversion Reports by Salesperson

### Salesperson Sales Lead to Orders

This report tracks quotes and orders created from *SALES LEAD entered within the date range.*

**SALES PERFORMANCE: CONVERSION OF SALESPERSON UPS TO ORDERS**
**Date Range: 09/08/10 to 12/31/10**

| Salesperson | Ups | Quotes & Estimates | % | Orders | % | Avg Sale | Lost Sales |
|---|---|---|---|---|---|---|---|
| GEORGE | 2 | 1 | 50% | 1 | 50% | $1,838 | $1,838 |
| JIM | 4 | 4 | 100% | 0 | 0% | $0 | $11,841 |
| JUDY | 3 | 1 | 33% | 0 | 0% | $0 | $8,881 |
| JULIA | 4 | 2 | 50% | 1 | 25% | $4,083 | $12,249 |
| NANCY REGAN | 1 | 0 | 0% | 0 | 0% | $0 | $2,960 |
| TERRY WHEAT | 1 | 0 | 0% | 0 | 0% | $0 | $2,960 |
| | 15 | 8 | 53% | 2 | 13% | $2,960 | $40,730 |

*Figure: Sample Salesperson Sales Lead to Orders Report*

**Salesperson Sales Lead Count:** Number of Sales Lead entered within the selected Date Range.
In the example report, George had 2 Sales Lead for the time period.

**Quote & Estimate Count: Number of Sales Leads within the date range** which have been exported to *or* related to one or more Quotes or Bid Pro Estimates regardless of the date of the quote or Bid Pro estimate. Quotes or estimates entered directly into other modules do not count. Related quotes or sub-estimates also do not count as they are considered to be a different version of the Primary quote or estimate.

In the example report, 1 of George's 2 Sales Lead for the time period had quotes or estimates exported from it.

**Quote & Estimate Percentage:** Quote & Estimate Count / Sales Lead Count

In the example report, 1/2 = 50%.

**Orders:** Number of **Sales Lead within the date range** which have been exported or related to one or more Quotes or Bid Pro Estimates and then exported to one or more Orders, or leads related to an existing quote. Orders entered directly into customer orders do not count.

In the example report, 1 of George's 2 Sales Lead for the time period had a quote or estimate exported from it which was then exported to an order.

**Order Percentage:** Order Count / Sales Lead Count

In the example report, 1/2 = 50%.

**Average Sale:** Average of Total Sales from Sales Lead for the Salesperson Sales Lead. Only those exported from a sales lead record will count, ones entered directly into other modules do not count.

George had one sale which originated as a sales lead in the amount of $1,837.54 so his average sale was $1,838.

**Lost Sales:** {(Sales Lead Count - Order Count) X that salesperson's average sale.} If a salesperson has no orders then the overall company average will be used as the average sale.

In the example report, since George had 1 Sales Lead that did not become an order and his average order amount was $1,838 his lost sales = $1,838.

NOTE: A group of Related Quotes or Sub Estimates will only count as 1 unless multiple orders have been created for the group. For example, if there are 4 related quotes and 1 has been exported to an order then the Quote & Estimate Count will be 1 and the Order Count will be 1. If there are 4 related quotes and 2 have been exported to orders then the Quote & Estimate Count will be 2 and the Order Count will be 2.

NOTE: This report will only be reliable for data produced with RFMS Core Version 10.6.0 and higher.

## Quotes and Estimates to Orders

This report tracks quotes and estimates entered within the date range.

**SALES PERFORMANCE: CONVERSION OF QUOTES AND BID PRO ESTIMATES TO ORDERS**
**Date Range: 09/08/10 to 12/31/10**

| Salesperson | Quotes & Estimates | Quote & Est Avg GP | Avg Quote & Est | Orders | Order Avg GP | Avg Order | Success % | Lost Sales |
|---|---|---|---|---|---|---|---|---|
| SALLY JONES | 11 | 5% | $1,760 | 5 | 28% | $2,411 | 45% | $14,468 |
| BILLY THOMPSON | 14 | 31% | $2,843 | 11 | 31% | $23,541 | 79% | $70,624 |
| HEATHER GREEN | 8 | 22% | $1,767 | 5 | 27% | $1,423 | 63% | $4,270 |
| TERRY WHEAT | 4 | 40% | $9,901 | 1 | 34% | $7,257 | 25% | $21,770 |
| NANCY REGAN | 58 | 23% | $4,336 | 55 | 1% | $3,550 | 95% | $10,650 |
| CLARENCE PHIFER | 5 | 26% | $1,408 | 4 | 49% | $526 | 80% | $526 |
| BILLY SMITH | 16 | 41% | $12,335 | 10 | 19% | $6,835 | 63% | $41,009 |
| GENE THOMPSON | 3 | 40% | $124,619 | 2 | 43% | $185,530 | 67% | $185,530 |
| GEORGE | 1 | 53% | $1,838 | 1 | 53% | $1,838 | 100% | $0 |
| JUDY | 1 | 0% | $0 | 0 | 0% | $0 | 0% | $9,769 |
| JULIA | 2 | 23% | $1,021 | 1 | 93% | $4,083 | 50% | $4,083 |
| | 123 | 26% | $7,695 | 95 | 14% | $9,769 | 77% | $362,700 |

*Figure: Sample Quotes and Estimates to Orders Report*

**Quote & Estimate Count:** Number of Quotes and Bid Pro Estimates with Quote Date or Estimate Date within the selected Date Range. Related quotes or sub-estimates do not count as they are considered to be a different version of the Primary quote or estimate. Although this report is within the PM module, the quotes and estimates counted are not necessarily related to a PM record.

| Store | Quote # | Export Date | Customer Name | PO Number | Quote Type |
|---|---|---|---|---|---|
| 100 | ES000011 | | MARSHALL EMERGENCY CARE | | Primary |
| 100 | ES000012 | | MARSHALL EMERGENCY CARE | | Original |
| 100 | ES000013 | | MARSHALL EMERGENCY CARE | | Related |
| 555 | ES000026 | 11/30/10 | THOMAS, JOHN | | Original |

In the example report, Gene Thompson has 2 original quotes, 1 primary quote with a related quote which counts as one and no estimates.   His count is 3.

**Quote & Estimate Average GP:** Average GP of all Quotes & Estimates Salesperson produced within the selected Date Range.

In the example report above, the GP %s for Gene's Quotes are:

ES000011 31.53 Primary
ES000012 33.22 Original
ES000013 31.32 Related
ES000026 55.01 Original

To get the average first average together any primary quotes with their related quotes and average together any Estimates with their sub-estimates. Then average those numbers with the remainder of the quotes and estimates.

31.53 + 31.32/2 = 31.425

31.425
33.22
+ 55.01
119.655/3 = 39.885 = 40%

**Quote & Estimate Average:** Average of all Quotes & Estimates Salesperson produced within the selected Date Range.  Total $ of quotes and estimates counted (does not include sub-estimates or related quotes)/Quote & Estimate Count

In the example report, the total $ for Gene Thompson's counted quotes and estimates is
373861.8
$369,528.40 divided by his count of 3 gives an average of $123,176.10.

In the example report above, the $ amounts for Gene's Quotes are:

ES000011 3024.18 Primary
ES000012 3100.50 Original
ES000013 895.65 Related
ES000026 367737.12 Original

To get the average first average together any primary quotes with their related quotes and average together any Estimates with their sub-estimates. Then average those numbers with the remainder of the quotes and estimates.

3024.18 + 895.65 = 3191.83/2 = 1959.92

```
         1959.29
         3100.50
+      367737.12
       372797.54 /3 = 124265.85
```

**Order Count:** Number of Quotes, related quotes, Bid Pro Estimates and sub- estimates which have been exported to an order per sales person. Those entered directly as an order including orders with leads related to them do not count

In the example report above, Gene Thompson had one quote and one related quote exported as orders.

**Order Average:** Average Order Total of the Salespersons Orders.

In the example report above, Gene Thompson's orders totaled $ 368,948.86 divided by 2 gives an average of $184,474.43.

**Order Average GP:** Average GP of all Orders Salesperson produced within the selected Date Range.

In the example report above, Gene Thompson's order had a GP% of 55.

**Success Percentage:** Order Count / Quote & Estimate Count

**Lost Sales:** (Quote & Estimate Count - Order Count) * Average Sale. If a Salesperson has no orders then the overall Average will be used as the Average Sale.

In the example report above, Gene Thompson's order average of $ 368,044.68 is multiplied by 2 for a lost sales amount of $736,089.

Notes:

A group of Related Quotes or Sub Estimates will only count as 1 unless multiple orders have been created for the group. For example, if there are 4 related quotes and 1 has been exported to an order then the Quote & Estimate Count will be 1 and the Order Count will be 1. If there are 4 related quotes and 2 have been exported to orders then the Quote & Estimate Count will be 2 and the Order Count will be 2.

This report will only be reliable for data produced with RFMS Core Version 10.6.0 and higher.

Prospects & Customers to Orders

This report gives details on prospects and customers created during selected time period by salesperson. Leads are not counted in this report.

**SALES PERFORMANCE: CONVERSION OF PROSPECTS & CUSTOMER TO ORDERS**
Prospect & Customer Records Created Between: 09/08/10 and 12/08/10

| Salesperson | Prospects & Customers | Quotes & Estimates | Quotes & Estimates % | Avg Quote & Estimate | Orders | Orders % | Avg Order | Lost Sales |
|---|---|---|---|---|---|---|---|---|
| BILLY SMITH | 3 | 2 | 67% | $4,221 | 3 | 100% | $3,903 | $0 |
| HEATHER GREEN | 1 | 1 | 100% | $16,184 | 1 | 100% | $5,691 | $0 |
| NANCY REGAN | 1 | 1 | 100% | $2,042 | 1 | 100% | $2,476 | $0 |
| SALLY JONES | 1 | 0 | 0% | $0 | 0 | 0% | $0 | $3,975 |
| | 6 | 4 | 67% | $6,667 | 5 | 83% | $3,975 | $3,975 |

*Figure: Sample Customers to Orders Report*

**Prospects &Customers:** Number of Customer/Prospect records created within the selected date range.

In the example above, Billy Smith had 3 customers or prospects entered to him during the time period.

The listing of Customer/Prospect records created within the selected date range can be found by going to *RFMS>Order Entry>File Customers>Find Button*. Use the Date entered fields and check to include CM Prospects.

**Quotes & Estimates:** Number of the Customer/Prospect records (Not the number of quotes or estimates) that generated at least one Quote or Estimate for any time period to any sales person.

In the example above, 2 of Billy Smith's 3 customers or prospects entered to him during the time period had quotes or estimates entered for them.

**Quotes & Estimates %:** Customers (not orders; a customer may have had more than one order) To Quotes & Estimates / Customers

In the example above for Billy's clients, 2/3 = 67%.

**Average Quote & Estimate:** Average Total of the Quotes & Estimates to this Salesperson's customers (Sales person does not have to be the same as the sales person on the customer record). (Total Sales $(all quotes/estimates to the filtered customers & prospects regardless of date)/Total number of quotes + estimates (not customers))

In the example above, Heather's customer had 1 quote and 2estimates totaling $48,552.90 for an average of $16184.30.

**Orders:** Number of the Customer/Prospect records that generated an Order.
In the example above, 3 of Billy Smith's 3 customers or prospects entered to him during the time period had orders entered for them.

**Orders %:** Customers/Prospects to Customers/Prospects with orders
In the example above for Billy's clients, 3/3 = 100%.

**Average Order:** Average Total of the Orders to this Salesperson's customers (Sales person does not have to be the same as the sales person on the customer record). (Total Sales $(all orders to the filtered customers & prospects regardless of date)/Total number of quotes + estimates (not customers))

In the example above, Heather's customer had 16 orders totaling $91,058.31 for an average of $5691.14.

**Lost Sales:** (Customers/Prospects – Customers/Prospects with orders) * Sales person's average Sale. If a Salesperson has no orders then the overall Average will be used as the Average Sale.

In the example above since Sally had no sales for her customer; the average of all salesperson's sales is used to calculate her lost sale.

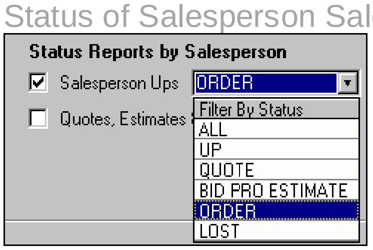
The final line of the report gives the calculations for all salespersons totaled.

NOTE: A group of Related Quotes or Sub Estimates will only count as 1 unless multiple orders have been created for the group. For example, if there are 4 related quotes and 1 has been exported to an order then the Quote & Estimate Count will be 1 and the Order Count will be 1. If there are 4 related quotes and 2 have been exported to orders then the Quote & Estimate Count will be 2 and the Order Count will be 2.

NOTE: This report will only be reliable for data produced with RFMS Core Version 10.6.0 and higher.

## Status Reports by Salesperson

### Status of Salesperson Sales Lead by Salesperson




This report breaks on salesperson giving details of SALES LEADS created during the chosen time frame. Reporting can be done on all possible status choices or one at a time.

**SALESPERSON UPS** — **JULIA**
**Date Range: 09/08/10 to 12/31/10**

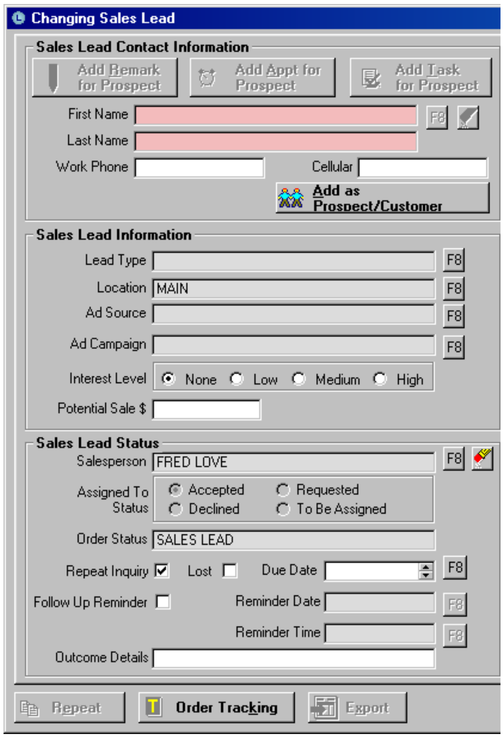
| Customer Name | Date | Type | Repeat Inquiry | Follow Up Date & Time | Potential Sale | Status | Last Quote or Estimate # | Order # |
|---|---|---|---|---|---|---|---|---|
| GREEN, HEATHER | 12/08/10 | OTHER | | 12/19/10 12:00 PM | $0.00 | UP | | |
| WALLACE, MARY | 12/08/10 | OTHER | X | 12/09/10 2:00 PM | $0.00 | UP | | |
| HIGH CHALET | 09/21/10 | OTHER | | | $265.00 | ORDER | ES000021 | CG000300 |
| WALLACE, MARY | 12/08/10 | OTHER | | | $0.00 | ORDER | JE000001-1 | CG900120 |

*Figure: Sample status of all quotes, estimates and orders by salesperson report*

**STATUS OF SALESPERSON UPS** — **JULIA**
**Date Range: 09/08/10 to 12/31/10**

| Customer Name | Date | Type | Repeat Inquiry | Oustanding Follow Up Date & Time | Potential Sale | Status | Last Quote or Estimate # | Order # |
|---|---|---|---|---|---|---|---|---|
| HIGH CHALET | 09/21/10 | WALK IN | | | $265.00 | ORDER | ES000021 | CG000300 |
| WALLACE, MARY | 12/08/10 | OTHER | | | $0.00 | ORDER | JE000001-1 | CG900120 |

*Figure: Sample status of all quotes, estimates and orders by salesperson report Orders only*




**Type:** This status may be updated manually.

**Repeat Inquiry:** will be marked with x on the report.

**Potential sale:** this is an amount manually entered on the up record.

**Status:** This status is automatically updated when a quote or bid pro estimate is exported from PM.

**Follow up date & time:** past follow ups will not show

## Status of All Quotes, Estimates and Orders by Salesperson

This report is similar to the status report in projects except that this report is for a defined time frame.

**STATUS OF QUOTES, BID PRO ESTIMATES AND ORDERS** — **SALESPERSON: BILLY SMITH**
**Date Range: 09/08/10 to 12/08/10**

**BID PRO ESTIMATES**

| Estimate # | Estimate Date | Estimate Total | Estimate GP | Estimate Type | Order Status | Order # | Order Date | Order Total | Order GP |
|---|---|---|---|---|---|---|---|---|---|
| JE000065-001 | 11/08/10 | $488 | 25% | PRIMARY ESTIMATE | NO ORDER | | | $0 | 0% |
| JE000064-001 | 11/08/10 | $6,418 | 25% | PRIMARY ESTIMATE | MATERIALS NOT ALLOCATED | CG000204 | 11/08/10 | $9,429 | 23% |
| JE000072-001 | 12/06/10 | $10,266 | 25% | PRIMARY ESTIMATE | MATERIALS NOT ALLOCATED | CG000293 | 12/06/10 | $10,266 | 100% |
| JE000072-001 | 12/06/10 | $10,266 | 25% | PRIMARY ESTIMATE | MATERIALS NOT ALLOCATED | CG000294 | 12/07/10 | $10,266 | 100% |

**QUOTES**

| Quote # | Quote Date | Quote Total | Quote GP | Related Quotes | Order Status | Order # | Order Date | Order Total | Order GP |
|---|---|---|---|---|---|---|---|---|---|
| ES000008 | 09/21/10 | $9,570 | 44% | 2 RELATED QUOTES | NO ORDER | | | $0 | 0% |
| ES000014 | 09/21/10 | $832 | 33% | RELATED TO PRIMARY QUOTE ES000008 | NO ORDER | | | $0 | 0% |
| ES000015 | 09/21/10 | $246 | -2% | RELATED TO PRIMARY QUOTE ES000008 | NO ORDER | | | $0 | 0% |
| ES000023 | 09/23/10 | $5,755 | 46% | NO RELATED QUOTES | NO ORDER | | | $0 | 0% |
| ES000024 | 09/23/10 | $5,338 | 45% | 1 RELATED QUOTE | NO ORDER | | | $0 | 0% |
| ES000025 | 09/23/10 | $5,120 | 49% | RELATED TO PRIMARY QUOTE ES000024 | NO ORDER | | | $0 | 0% |
| ES000028 | 12/02/10 | $44,970 | 100% | NO RELATED QUOTES | NO ORDER | | | $0 | 0% |
| ES000029 | 12/02/10 | $275 | 100% | NO RELATED QUOTES | NO ORDER | | | $0 | 0% |

**ORDERS**

| Order Status | Order # | Order Date | Order Total | Order GP |
|---|---|---|---|---|
| NO MATERIAL LINES | CG000269 | 12/02/10 | $175 | 100% |
| MATERIALS ALLOCATED | CG000279 | 12/06/10 | $788 | 53% |
| NO MATERIAL LINES | CG000284 | 12/06/10 | $1,418 | 46% |
| MATERIALS NOT ALLOCATED | CG000289 | 12/06/10 | $0 | 0% |
| JOB COSTED | CG000291 | 12/06/10 | $503 | 48% |
| MATERIALS DELIVERED | CG000292 | 12/06/10 | $721 | 20% |
| JOB COSTED | CG000295 | 12/07/10 | $2,276 | 20% |
| MATERIALS NOT ALLOCATED | CG000297 | 12/07/10 | $4,035 | 68% |
| Salesperson Totals | | | $39,878 | |

*Figure: Sample status of all quotes, estimates and orders by salesperson report*

The sample status of all quotes, bid pro estimates and orders report is the page for one salesperson during the time frame.

## Bid Pro Estimates

The report will list first in the top section, any Bid Pro estimates. If an estimate was converted to an order, the order will be listed to the right. If the estimate was sent to more than one order it will be listed for each order. Otherwise the section will say NO ORDER.

### Some Estimate Report Columns explanations:

**Date:** the date the record was entered
**Estimate Total:** this number comes directly from the estimate
**Estimate GP%:** this number comes directly from the estimate
**Estimate Type:** the description here will either be **primary estimate** with a dash and the number of sub estimates related to it or **sub estimate.**

**Order Status:** the status of material lines on the order

**NO LINES**: No material lines have been entered.

**MATERIALS NOT ALLOCATED:** at least one material line on the order has a status of None, Gen PO or On Order. PM defines allocated as being received into inventory and being assigned to an order.

**MATERIALS ALLOCATED:** no material lines have a status of None, Gen PO or On Order and at least one material line has a status of Cut, Staged or Reserved.

**MATERIALS DELIVERED:** no material lines have a status of None, Gen PO, On Order, Cut, Staged or Reserved and at least one material line has a status of delivered.

**COMPLETED:** no material lines have a status of None, Gen PO, On Order, Cut, Staged, Reserved or Delivered and at least one material line has a status of job costed.

**Order GP%:** this number comes directly from the order

## Quotes

The next section of the report lists quotes related to the project. If a quote was converted to an order, the order will be listed to the right. Otherwise the section will say NO ORDER.

### Some Quote Report Columns explanations:

**Date:** the date the record was entered

**Quote GP%:** this number comes directly from the quote

**Related Quote:**

Original quote will say no related quote
Primary quote will say # of related quotes
Related quote will say Related to Primary Quote and give the quote number.

## Orders

The final section lists orders which did not originate as either a Bid Pro estimate or a Quote.

Quotes to Orders data will only be accurately reflected from the 10.6.0 install date forward.

## Summary Reports by Salesperson

### Salesperson Sales Lead Aging

This report shows the total Sales Lead by Salesperson and shows the number of Sales Lead in each of the following categories:

**Active by age:** The Sales Lead ages from the date it was created.

**Quotes & Estimates:** Number of Sales Lead which have been exported to one or more Quotes or Bid Pro Estimates. Only those exported from a Sales Lead record will count, ones entered directly into other modules do not count.

**Orders:** Number of Sales Lead which have been exported to one or more Quotes or Bid Pro Estimates and then exported to one or more Orders. Only those exported from a Sales Lead record will count, ones entered directly into other modules do not count.

**Lost:** For a lead to be considered lost it will need to be marked on the record or meet the criteria set for a lost lead in *Utilities>System Options>Project Manager>Sales Leads>automatically move Sales Leads to Lost after # of Days (Feature is Inactive if 0).*

**Total:** All Sales Lead for that time period. This column should be the total of the previous 7 columns.

**SALES PERFORMANCE: SALESPERSON UPS AGING SUMMARY**
**Date Range: 09/08/10 to 12/31/10**

| Salesperson | Active Ups Aging 0-7 | Active Ups Aging 8-14 | Active Ups Aging 15-21 | Active Ups Aging >21 | Quotes & Estimates | Orders | Lost Ups | Total Ups |
|---|---|---|---|---|---|---|---|---|
| GEORGE | 1 | 0 | 0 | 0 | 0 | 1 | 0 | 2 |
| JIM | 0 | 0 | 0 | 0 | 3 | 1 | 0 | 4 |
| JUDY | 1 | 0 | 0 | 0 | 2 | 0 | 0 | 3 |
| JULIA | 2 | 0 | 0 | 0 | 0 | 2 | 0 | 4 |
| NANCY REGAN | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| TERRY WHEAT | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 1 |
| | 6 | 0 | 0 | 0 | 5 | 4 | 0 | 15 |

*Figure: Sample Salesperson Sales Lead Summary report*

### Overall Performance

This report combines transactions from SALES LEAD as well as directly entered into other RFMS modules to give a salesperson's overall performance.

**OVERALL SALES PERFORMANCE: SUMMARY OF ALL UPS, QUOTES AND BID PRO ESTIMATES TO ORDERS**
**Date Range: 09/08/10 to 12/31/10**

| Salesperson | Ups | Quotes & Estimates From Ups | % Ups to Quotes & Estimates | Other Quotes & Estimates | All Quotes & Estimates | Orders | % Orders | Avg Sale | Lost Sales |
|---|---|---|---|---|---|---|---|---|---|
| BILLY SMITH | 0 | 0 | 0% | 12 | 12 | 1 | 8% | $9,429 | $103,720 |
| BILLY THOMPSON | 0 | 0 | 0% | 6 | 6 | 2 | 33% | $114,587 | $458,348 |
| CLARENCE PHIFER | 0 | 0 | 0% | 4 | 4 | 2 | 50% | $522 | $1,044 |
| GENE THOMPSON | 0 | 0 | 0% | 3 | 3 | 1 | 33% | $3,015 | $6,029 |
| GEORGE | 2 | 1 | 50% | 0 | 1 | 1 | 100% | $1,838 | $0 |
| HEATHER GREEN | 0 | 0 | 0% | 5 | 5 | 2 | 40% | $2,092 | $6,275 |
| JIM | 4 | 4 | 100% | 0 | 4 | 0 | 0% | $0 | $78,565 |
| JUDY | 3 | 1 | 33% | 1 | 2 | 0 | 0% | $0 | $58,924 |
| JULIA | 4 | 2 | 50% | 0 | 2 | 1 | 50% | $4,083 | $4,083 |
| NANCY REGAN | 1 | 0 | 0% | 8 | 8 | 2 | 25% | $1,022 | $6,132 |
| SALLY JONES | 0 | 0 | 0% | 9 | 9 | 1 | 11% | $525 | $4,203 |
| TERRY WHEAT | 1 | 0 | 0% | 4 | 4 | 0 | 0% | $0 | $19,641 |
| | 15 | 8 | 53% | 52 | 60 | 13 | 87% | $19,641 | $746,965 |

*Figure: Sample Summary of all Sales Lead, quotes, and estimates report*

**Sales Lead:** Number of Salesperson Sales Leads Created within selected date range.

**Quotes & Estimates From Sales Lead:** Number of Salesperson Sales Leads within the date range that were exported to a Quote or Estimate.

**% of Sales Lead to Quotes & Estimates:** Quotes & Estimates to Sales Lead / Sales Lead

For details on these fields see the explanations of Salesperson Sales Lead to Orders by Salesperson.

**Other Quotes & Estimates:** Number of Quotes & Estimates with a Quote Date or Estimate Date within the selected date range that are not related to a Salesperson Sales Lead. A Quote/Estimate will not count if one of the Related Quotes or Sub Estimates is related to a Salesperson Sales Lead because that would be included in Quotes and estimates from Sales Lead. A group of Related Quotes or Sub Estimates will only count as 1 in this column.

In the sample report, Heather had 4 Bid Pro Estimates created from 9/8/10-12/31/10 plus 1 original quote and 1 primary quote with 3 related quotes (counting as 1). Her quote count and estimates count is 5.

| Store | Estimate # | Sub | Date | Customer Name |
|---|---|---|---|---|
| 100 | JE000038 | 001 | 09/17/10 | HIGH CHALET |
| 100 | JE000041 | 001 | 09/21/10 | RFMS.INC. |
| 100 | JE000051 | 001 | 09/29/10 | DCH HOSPITAL |
| 100 | JE000067 | 001 | 11/11/10 | LAW OFFICES OF LAW,PI |

*Figure: Heather's Estimates*

| Store | Quote # | Export Date | Customer Name | PO Number | Quote Type | Primary |
|---|---|---|---|---|---|---|
| 100 | ES000016 | 12/06/10 | SMITTY'S CARPENTRY | | Primary | ES000016 |
| 100 | ES000017 | | SMITTY'S CARPENTRY | | Related | ES000016 |
| 100 | ES000018 | | SMITTY'S CARPENTRY | | Related | ES000016 |
| 100 | ES000019 | | SMITTY'S CARPENTRY | | Related | ES000016 |
| 100 | ES000032 | 12/03/10 | RFMS,INC. | | Original | ES000032 |

*Figure: Heather's Quotes*

**All Quotes & Estimates:** Total number of Quotes & Estimates. Quotes & Estimates From Sales Lead + Other Quotes & Estimates.

In the sample report, Heather had no quotes & estimates from Sales Lead so this total is 5.

**Orders:** Number or All Quotes & Estimates that were exported to an Order.

In the sample report, a primary quote and an original quote were exported to Order Entry for a total of 2.

**% All to Orders:** All To Orders / All Quotes & Estimates

In the sample report, 2/5 = 40%

**Average Sale:** Average Order Total of the Salespersons Orders.

Total Average sales: to account for some salespersons having more orders than others this total is calculated by (Sum (Salesperson Orders * Salesperson Average Sale)) / Total Orders.

**Lost Sales:** (All Quotes & Estimates - All to Orders) * Average Sale. If a Salesperson has no orders then the overall Average will be used as the Average Sale.

## Product Cost History

*Reports>Products*

This report gives a history per product, customer or both on costs. As of version 10.6, this report also displays the history of the cost changes within the date range chosen.

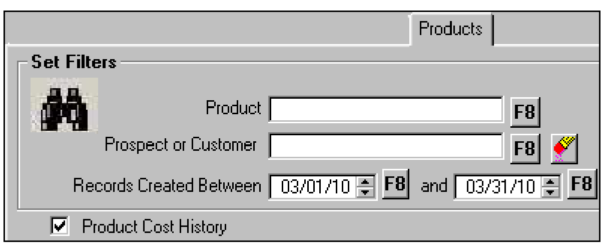



*Figure: Product Cost History Screen*

F8 to choose the product

Filter by product code and then Search by Private Style

F8 to choose the customer

Can be limited to Active Prospects, Active Customers or All.

Then search by customer name.

To make the list more manageable enter the optional Records created date range.

The top portion of the report shows the cost history during the time period reported. The bottom portion is the listing of jobs using the product and the cost, quantity and price on the record. Product Cost History is sorted by Cost, Order Date, and Order Number.

**Product Cost History**

Private Style: ABINGDON MILL - 12' Private Number: 56120
Private Supplier: MY SUPPLIER Size: 12

| Source | Start Date | End Date | Comments | Cost | Pkg Qty | Cost Type |
|---|---|---|---|---|---|---|
| COST HISTORY FILE | 02/28/10 | | | $14.40 | 0.00 | ROLL |
| COST HISTORY FILE | 04/14/10 | | | $14.40 | 0.00 | ROLL |
| COST HISTORY FILE | 05/16/10 | | | $14.40 | 0.00 | ROLL |
| COST HISTORY FILE | 02/28/10 | | | $15.65 | 0.00 | CUT |
| COST HISTORY FILE | 04/14/10 | | | $15.65 | 0.00 | CUT |
| COST HISTORY FILE | 05/16/10 | | | $15.65 | 0.00 | CUT |

| Source | Order Date | Sold To | Ship To | JOB Info | Cost | Qty | Price |
|---|---|---|---|---|---|---|---|
| CG002122 | 09/08/10 | APLIN, GORDON | APLIN, GORDON | | $15.65 | 66.67 | 43.11 |
| CG002116 | 08/23/10 | LUNSFORD, BILL | UNIVERSITY GENERAL DENTISTRY | | $15.65 | 264.44 | 20.27 |
| JE100077 | 08/23/10 | LUNSFORD, BILL | UNIVERSITY GENERAL DENTISTRY | | $26.82 | 264.44 | 43.11 |

*Figure: Sample Product Cost History Report*

## Activity Reports

*File>Reports>Activity Reports*

New capability was added in version 10.6 to report on activity for all records or just for Prospects and Customers. This screen can actually be many reports depending on the options chosen.

The Date that is used for filtering is due date.
The report can also be filtered by **Remark Type**.

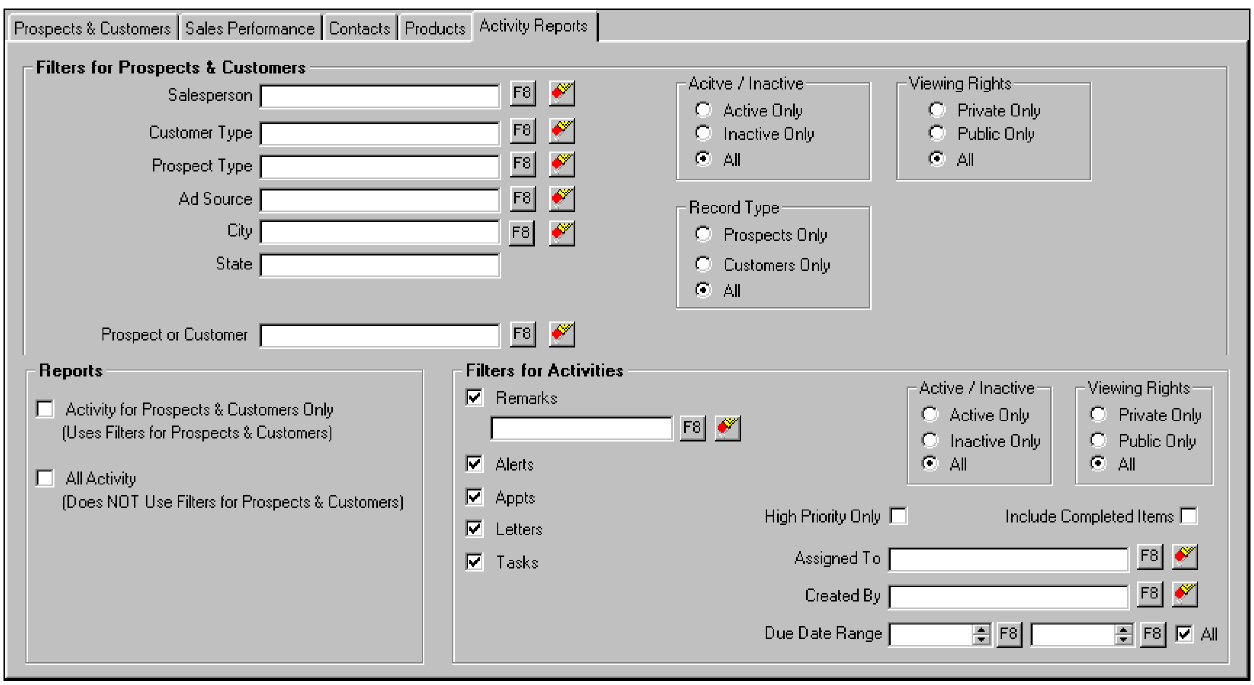



*Figure: Activity Reports Screen*

## Activity for Prospects & Customers

For reporting on prospect and customers, first use the filter options in the **Filters for Prospects & Customers** section. Then optionally use the **Filters for Activities** to further refine the list.

**Activity for Prospects & Customers**

| Source | Name | Item | Description | Type | Date | Assigned To | Status |
|---|---|---|---|---|---|---|---|
| CUSTOMER | CMMS CUSTOMER | REMARK | NANCY EMAILED CONTACT | | 05/01/09 | | |
| PROSPECT | CUSTOMER, RETAIL | LETTER | Client Management | GENERAL | 02/17/10 | kim | SENT |
| CUSTOMER | SKELTON, JERRY | REMARK | ADD REMARK RELATE IT THE CUSTOMER | | 07/09/10 | | |
| CUSTOMER | SMITH, GREG | REMARK | ADD ANOTHER | | 07/09/10 | | |
| CUSTOMER | SMITH, S. | LETTER | New relationship | GENERAL | 05/05/09 | Nancy | SENT |

## All Activity

For reporting all PM activity only the **Filters for Activities** applies.

**Activity Report**

| Source | Name | Item | Description | Type | Date | Assigned To | Status |
|---|---|---|---|---|---|---|---|
| PURCHASE ORDER | CG902011-1 | ALERT | PURCHASE ORDER STATUS CHANGE | SYSTEM GENERATED | 05/05/09 | NANCY | COMPLETED |