



Version 21.0.1

# Update Document

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# Introduction

This update to the Windows version of the RFMS Business Management System includes many new features and enhancements. The update also includes many “behind the scenes” changes that increase processing speed and other performance-related functions. This document explains only the new features contained in this update.

For all alterations, see the release notes on the download web page or [Release Notes – RFMS Help Desk \(zendesk.com\)](#)

## RFMS Core

RFMS Core Program Suite For Sql

[Rfms Update](#) (Last Download Date 4/8/2021) | [Documentation](#)  
[B2B Service](#) | [Manual](#)  
[Barfont \(New Installs Only\)](#) | [Documentation](#)  
[Release Notes](#) (Last Download Date 4/8/2021)  
[RFMS Workstation Components \(New Installs Only\)](#) | [Documentation](#)

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

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

The same documentation is included in the online help system and can be accessed by pressing the F1 button at any RFMS screen. If something is on the screen you either do not recognize or understand, check this document, refer to the Help Files by pressing F1 or go to <https://rfmsinc.zendesk.com>

# System-Wide

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## Local Outlook Warning Message

A message will appear when RFMS is opened. This message will explain the phasing out of the support of local outlook.



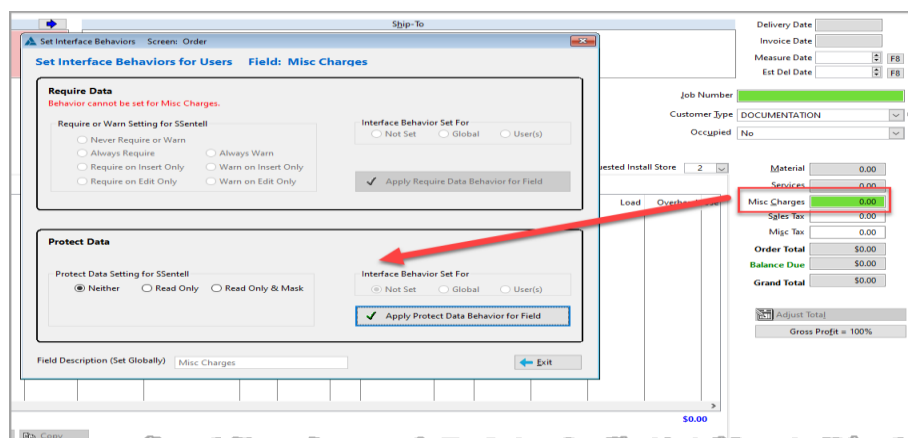
## RFMS Credit Card Services By CardConnect

RFMS has created an integrated payment processing system powered by CardConnect that processes sales orders and invoices at the point of sale, mobile payment, and customer web portal. For more information on how to sign up, go to <https://www.rfms.com/solutions/credit-card-services/>.

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## Interface Mode

The ability to make the Misc Charge field in Order and Quotes as read-only and read-only and mask has been added to the Interface mode.



## Order Entry

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### Find Screen

The ability to search by Customer Number in Orders, Quotes, and Claims has been added.

Find Orders

Order Number

Customer Number

Sold To

Name

Address 1

Address 2

City

State  Zip

County

Job Number

PO Number

Customer Type

Sales Rep 1

Sales Rep 2

RegTestPho

2Phones

Balance Options

Delivery Date Options

Commission Not Paid  Exclude Voids  Statement On Hold

Remark Type

Ad Source

Order Type/TBD

Contract Type/TBD

Service

Phase

Tract

Block

Lot

Model

Bldg Unit#

All Lines Delivered (available if "Delivery Date Options" is "UnDelivered Only")

Providers Balanced

Order Date From  To

Est Del Date  To

Measure Date  To

Delivery Date From  To

Close Date  To

Invoiced/Billed From  To

Date Entered  To

Job Cost Trans. Date  To

Balance From  0.00 To  0.00

Schedule Pro Status

Stores

0  
1  
2  
3  
4  
5  
6  
7  
8  
9  
A  
B  
C  
T  
U  
V  
Z

Clear Save Load  Create as Static List OK Cancel

# Inventory

## Purchase Orders

### Auto PO

### Notes

Internal Lines Notes and Custom Line Notes can now be viewed from the To Buy List screen.

To Buy List (Order Lines Toggled for Auto PO Generation)

Gen Po Order Lines \* NOTE - Order Lines that are currently being processed will not be displayed below.

Select Notes

Internal Line Notes

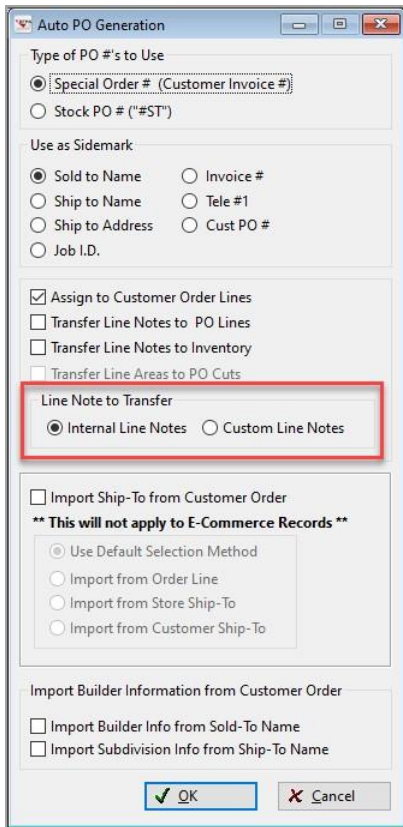
Custom Line Notes

View All Notes

Supplier	SC	PC	Style/Item	Width	Length	Item Size	Qty	Unit
	"1"	01	12' CARPET SOLI	12.00	30.75	-----	41.00	SY
	"1"	01	12' CARPET SOLI	12.00	12.00	-----	16.00	SY
	"2"	01	ALL STAR WEEKE CARIBBEAN COLE0145	12.00	39.83	-----	53.11	SY

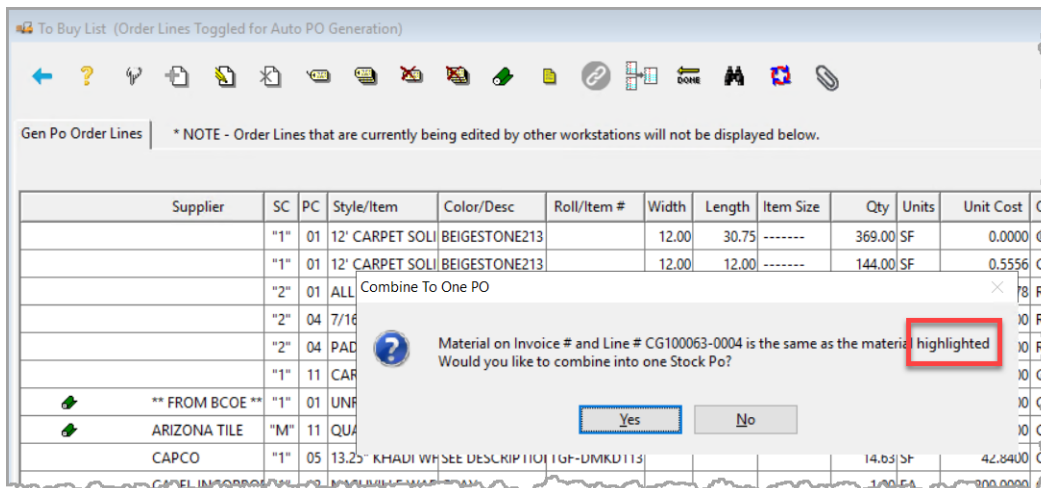
### Auto PO Generation

The option to select which Line note to transfer to the Purchase order has been added. Both cannot be selected.



## Combine

A warning message for the Combine function has been reworded.



When combining order lines with the same materials into one stock purchase order, the line assignments will be retained. This allows the link to the new purchase order and new inventory record to be kept.

## Before Version 21.0

To Buy List (Order Lines Toggled for Auto PO Generation)

Gen Po Order Lines \* NOTE - Order Lines that are currently being edited by other workstations will not be displayed below.

Supplier	SC	PC	Style/Item	Color/Desc	Roll/Item #	Width	Length	Item Size	Qty	Units	Unit Cost	Order Number	Line
DOC U. MENT	"2"	06	TELL ME A STOR	RED RIDING HO	OS123			0.0X0.0	25.00	BX	200.0000	RF000061	
DOC U. MENT	"2"	06	TELL ME A STOR	RED RIDING HO	OS123			0.0X0.0	25.00	BX	200.0000	RF000062	

Customer Order

### Original Order

Order # RF000061 Store F8 Order Date 05/13/21 RegTestPho 205-657-4000 2Phones 202-123-4567

Sold-To

MENT, DOC U.  
123 PAPER STREET  
ALICEVILLE, AL 35442  
County: PICKENS

MENT, DOC U.  
123 PAPER STREET  
ALICEVILLE, AL 35442  
County: PICKENS

Line #	Style	Product Code	Roll/Item Number	Color/Description	Status	Group
01	#ST001960001	PIE R ROUND	COOKIES AND CREA			
4 06	OS123	TELL ME A STORY	RED RIDING HOOD			

Group	PC	Roll/Item #	Style / Item Name	Color / Description	Width	Length	Quantity	Units	Price	Total	Status	Line #	Est D
01	#ST001960001	PIE R ROUND	COOKIES AND CREA		12.00	25.00	33.33	SY	25.00	833.25	On Order 05/14/21	0001	
4 06	OS123	TELL ME A STORY	RED RIDING HOOD		0.0	0.0	25.00	BX	40.00	1,000.00	None	0002	

## Version 21.0

To Buy List (Order Lines Toggled for Auto PO Generation)

Gen Po Order Lines \* NOTE - Order Lines that are currently being edited by other workstations will not be displayed below.

Supplier	SC	PC	Style/Item	Color/Desc	Roll/Item #	Width	Length	Item Size	Qty	Units	Unit Cost	Order Number	Line	Total Cost
DOC U. MENT	"2"	01	PIE R ROUND	COOKIES AND C		12.00	25.00	-----	33.33	SY	0.0500	RF000061	1	1.67
DOC U. MENT	"2"	01	PIE R ROUND	COOKIES AND C		12.00	25.00	-----	33.33	SY	0.0500	RF000062	1	1.67
DOC U. MENT	"2"	06	TELL ME A STOR	RED RIDING HO	OS123			0.0X0.0	25.00	BX	200.0000	RF000061	2	5,000.00
DOC U. MENT	"2"	06	TELL ME A STOR	RED RIDING HO	OS123			0.0X0.0	25.00	BX	200.0000	RF000062	2	5,000.00

Customer Order

### Original Order

Order # RF000061 Store F8 Order Date 05/13/21 RegTestPho 205-657-4000 2Phones 202-123-4567

Sold-To

MENT, DOC U.  
123 PAPER STREET  
ALICEVILLE, AL 35442  
County: PICKENS

MENT, DOC U.  
123 PAPER STREET  
ALICEVILLE, AL 35442  
County: PICKENS

Line #	Style	Product Code	Roll/Item Number	Color/Description	Status	Group
01	#ST001960001	PIE R ROUND	COOKIES AND CREA			
4 06	OS123	TELL ME A STORY	RED RIDING HOOD			

Group	PC	Roll/Item #	Style / Item Name	Color / Description	Width	Length	Quantity	Units	Price	Total	Status	Line #	Est Del
01	#ST001960001	PIE R ROUND	COOKIES AND CREA		12.00	25.00	33.33	SY	25.00	833.25	On Order 05/14/21	0001	
4 06	OS123	TELL ME A STORY	RED RIDING HOOD		0.0	0.0	25.00	BX	40.00	1,000.00	Gen PO	0002	

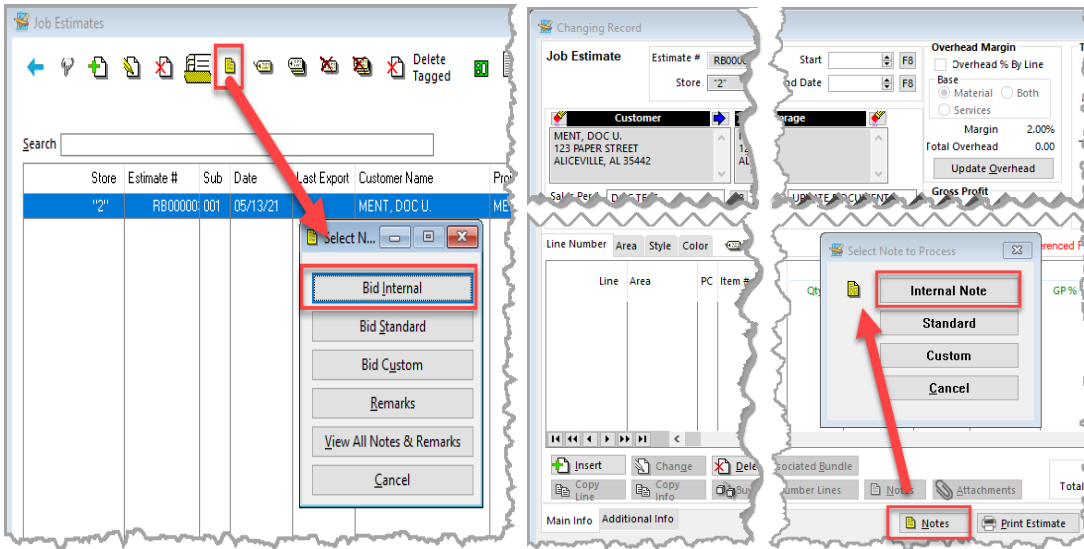
# Human Resource

The 941 form for the Second quarter of 2021 is included in version 21.0.1.

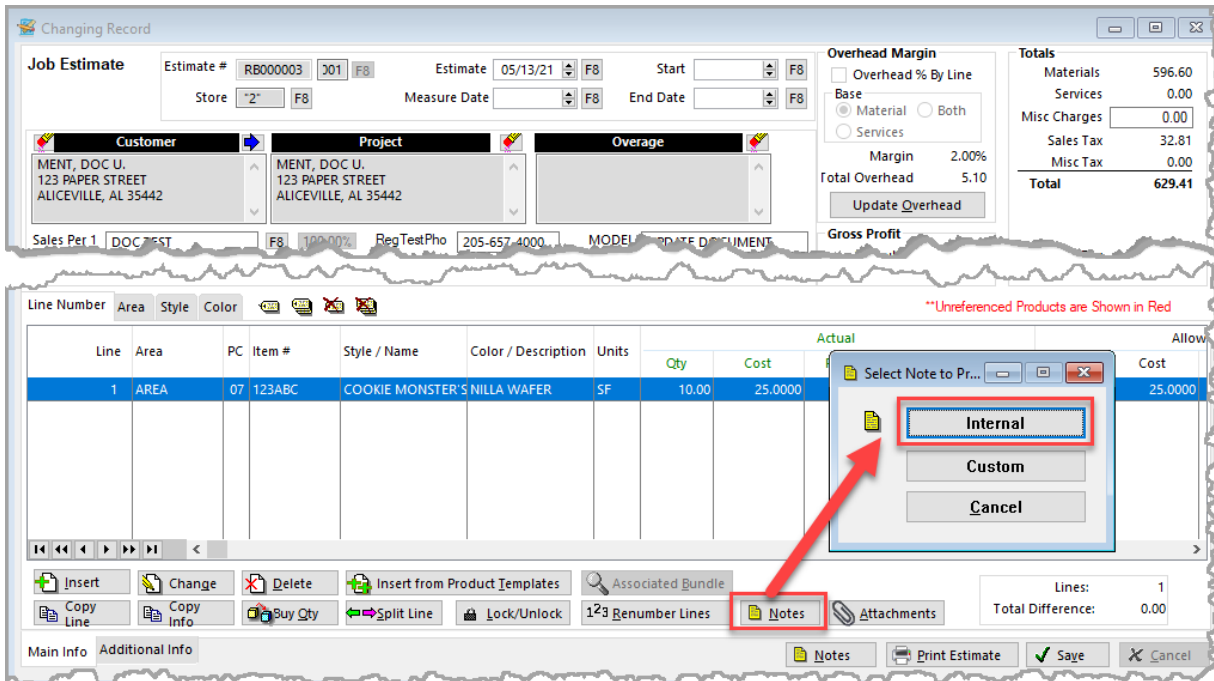
# BidPro

## Notes

The ability to add an Internal Note to an estimate has been added.



The ability to add an Internal Line Note has been added.



Internal Line Notes can now be exported as Order Line Notes if the check box "Export Internal Line Note to Order Lines" is checked.

Export Estimate to Order Entry

### Export to Order

Estimate #: FB000003      Estimate Date: 05/13/21

**Order Details**

Order Number: [F8]  
Order Date: 05/13/21 [F8]      Est Del Date: [F8]  
Customer Type: DOCUMENTATION [F8]      PO Number: [F8]

Customer: MENT, DOC U.  
123 PAPER STREET  
ALICEVILLE, AL 35442

Project: MENT, DOC U.  
123 PAPER STREET  
ALICEVILLE, AL 35442

Overage  
Salesperson(s): DOC TEST

Line	Area	PC	Style	Color	Width	Item #	Quantity	Price	Total
001	T AREA	07	COOKIE MONSTER'S COO	NILLA WAFER	0.00	123ABC	10.00	59.66	596.60

**Export Options**

- Export Custom Note to Order
- Export Custom Note to Work Order
- Export Internal Note to Order
- Export Line Notes to Work Order Lines
- Export Line Notes to Order Lines
- Combine and Append Similar Lines for Order (\*\*Line Notes will be lost when this option is enabled)
- Do Not Export Prices & Totals (Prices and Totals will be set to 0)
- Export Internal Line Notes to Order Lines
- Update Contract Pricing on Estimate before Exporting

Edit Order After Exporting