



Systems for Success

A decorative graphic on the right side of the page, consisting of three overlapping, wavy, curved shapes. The top shape is light gray, the middle is dark red, and the bottom is black. The text "Schedule Pro User Guide" is overlaid on the red and black sections.

Schedule Pro User Guide

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Getting Started

Installing Schedule Pro

The executable for this program will be included with the RFMS program, licensing the software will be necessary.

Starting Schedule Pro

There are 3 ways to open Schedule Pro.

1. After installing, a Schedule Pro shortcut will be placed on the desktop. Click the icon to open the program. (TIP: a shortcut can be created on the server and moved to the desktop of other workstations on the network as needed.)
 2. Schedule Pro can be opened from the RFMS Navigator.
 3. The program may also be run from the Windows Start Bar and by clicking on *Start>Programs>RFMS for Windows>SchedulePro*
-

Setting up Schedule Pro

Before scheduling jobs can begin, some system configuration is necessary. Most of this will be covered in the Schedule Pro training session, included with the purchase of Schedule Pro. The system Setup areas for Schedule Pro are shown below.

This checklist can be used during the setup process. Click on the item for details.

- [Order Entry Configuration](#)
- Set Up
 - [Job Types](#)

The Job Types entry is the most important part of the setup process. It is the key to how capacity tracking of crew and depots function and how installers are separated based on the different materials they install.
 - [Installation Depots](#)

An installation depot is a group of installers, it is not necessary to have more than one depot.
 - [Crews](#)




A “crew” in schedule pro can be an installer or it can be a record for an installation subcontractor who has several people working for them but gets scheduled as a single unit.
 - Job Time Slots
 - Skill Levels
 - Job Status
 - Tracking Tables
 - Stores
- [System options](#)
- [Passwords](#)

Schedule Pro Buttons in RFMS:




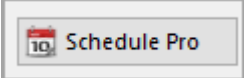
This icon indicates that the line item or job has already been scheduled. It might be seen in an Order Entry browse or when choosing a job in Schedule Pro.

Alert Indicators

These are optionally shown based on the setting in <i>Utilities>System Options>Order Entry>Alerts>Display Schedule Pro Alerts on Order Entry Browse</i>	
	This icon will appear in the Order Entry browse and it indicates that there is an outstanding Order Entry Alert for this job. This indicates that the order has been changed since the job was scheduled and the scheduled job HAS NOT been changed to reflect the order changes.
	This icon will appear in the Order Entry browse and it indicates that there is a To Be Scheduled alert outstanding for this order.
	If a job is scheduled for more than one day, a BLUE Plus sign is displayed next to the Start Date in many of the Schedule Pro screens.

Scheduling/Editing Jobs

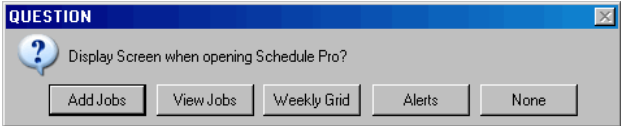
Scheduling or editing jobs in schedule pro can be done from various areas of Schedule Pro and Customer Orders. Click the marked section to see details on each area.

1. Customer Order or Claim >Schedule Pro Button  or 
 - a. Opens Schedule New Jobs
 - b. Create an alert for a job to be scheduled
2. [Scheduled Jobs](#) Insert button opens Schedule New Jobs
3. [Schedule New Jobs](#)
4. [Quick Schedule](#)
5. [Quick Edit](#)
6. [Weekly Grid](#) Insert button opens Schedule New Jobs
7. [Daily Grid](#) Insert button opens Schedule New Jobs
8. Order Entry Alerts
9. [Orders Ready to Schedule](#) –**Add to Schedule Button** opens schedule new jobs screen with the job information

Schedule Pro Main Menu



The first time entering the Schedule Pro system a decision of the default screen to open will be made. Select the screen most often used.

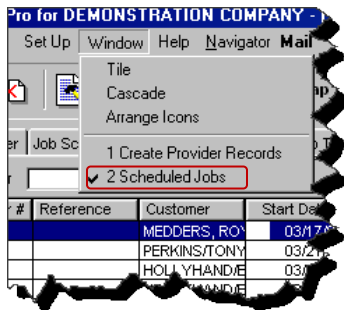


To change this later, go to *Utilities>System Options>Schedule Pro>General>Screen to Display on Start Up*



Notes: Regardless of the choice here, if the option is set to open schedule pro for the selected order, pressing the schedule pro button on the orders browse will open the schedule new job screen.

Multiple Screens can be opened at the same time. This new design should allow a job to be scheduled from Order Entry even if Schedule Pro is already open. It should just open another instance of the Schedule New Jobs screen. To see all screens open at the moment, go to *Window* and a listing will be shown. The screen currently being viewed will have a check mark beside it.



File Menu

Options for Scheduling new jobs and working with already scheduled jobs are located under this menu. See below for details on each of these options.

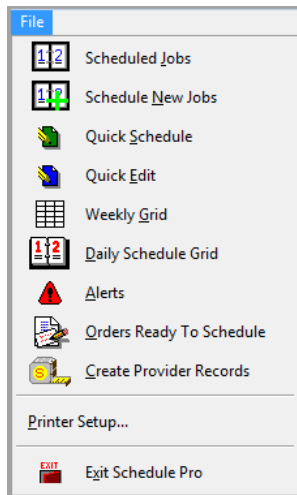


Figure: Schedule Pro File Menu

Edit for Job Screens

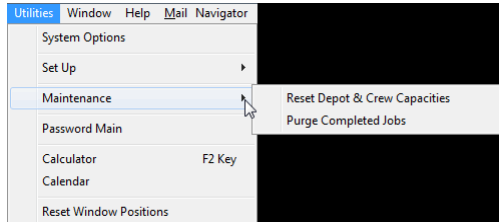
The edit menu options vary depending on the screen open at the time.

Reports

Schedule Pro Reports have their own menu.

[Click to see report details.](#)

Utilities



System Options and set up are located under the utilities menu. A maintenance menu is also under the utilities. The calculator and calendar found in other RFMS modules are included in Schedule Pro.

Window

The bottom part of the screen lists all windows open in the current module. The one currently being viewed is checked. To view a different window, click it with the mouse.

Help

Schedule Pro has a web based help file.

Navigator

Every **RFMS** for Windows module has a Navigator that serves as a "**Main Menu**". The main **RFMS** Navigator allows the user to access different modules within **RFMS**. After selecting one of the options, the main screen for that module will appear.

Mail

Allows access to the internal RFMS mail system

Utilities

Schedule Pro>Utilities

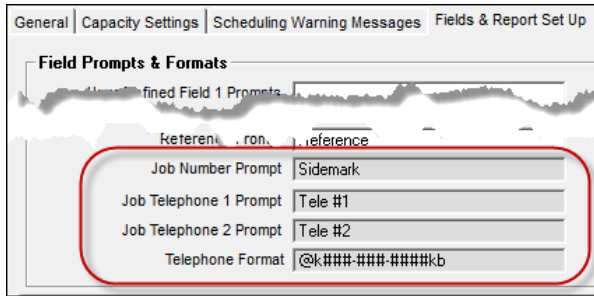
System Options

>Utilities>System Options>Schedule Pro

Assigned and User options are user specific. These settings are stored in the database. These options relate to a Windows User login, regardless of the specific computer or workstation.

Version 12.0 conversion notes: Some order entry settings were included as view only in Schedule Pro. Since all options can be viewed from any modules, these are no longer associated with schedule pro.

Example:



Capacity Settings

Schedule Pro>Utilities>System Options>Schedule Pro>Capacity Settings or X>Utilities>System Options>Schedule Pro>Capacity Settings

Type- Must be Global

The options for viewing and calculating capacities for the entire installation depot are set with these options. The capacities for each crew will be set in the crew set up. Capacities are the totals of materials or jobs which can be completed in a day.

Type	Module	Applies To	Category	Option	Value	Note
Global	Schedule Pro	Capacity Settings	Configuration	Calculate Installation Depot Maximum Capacity Based On	Automatically Calculated from Crew Capacities	
Global	Schedule Pro	Capacity Settings	Configuration	Maximum Jobs per Day per Crew	3	
Global	Schedule Pro	Capacity Settings	Configuration	Use Linear Meters	No	
Global	Schedule Pro	Capacity Settings	Configuration	View Installation Depot Capacities By	Quantity Available	
Global	Schedule Pro	Capacity Settings	Configuration	Adjust Installation Depot Capacity Levels - Friday	100	Depends on the "Calculate Installation Depot Maximum Capacity Based On" Setting
Global	Schedule Pro	Capacity Settings	Configuration	Adjust Installation Depot Capacity Levels - Monday	100	Depends on the "Calculate Installation Depot Maximum Capacity Based On" Setting
Global	Schedule Pro	Capacity Settings	Configuration	Adjust Installation Depot Capacity Levels - Saturday	100	Depends on the "Calculate Installation Depot Maximum Capacity Based On" Setting
Global	Schedule Pro	Capacity Settings	Configuration	Adjust Installation Depot Capacity Levels - Sunday	100	Depends on the "Calculate Installation Depot Maximum Capacity Based On" Setting
Global	Schedule Pro	Capacity Settings	Configuration	Adjust Installation Depot Capacity Levels - Thursday	100	Depends on the "Calculate Installation Depot Maximum Capacity Based On" Setting
Global	Schedule Pro	Capacity Settings	Configuration	Adjust Installation Depot Capacity Levels - Tuesday	100	Depends on the "Calculate Installation Depot Maximum Capacity Based On" Setting
Global	Schedule Pro	Capacity Settings	Configuration	Adjust Installation Depot Capacity Levels - Wednesday	100	Depends on the "Calculate Installation Depot Maximum Capacity Based On" Setting
Global	Schedule Pro	Capacity Settings	Configuration	Deduct Crews from Installation Depot Capacities Based On	Manually Enter Number of Crews to Deduct	Depends on the "View Installation Depot Capacities By" Setting

Figure: Capacity Settings

Calculate Installation Depot Maximum Capacity Based on:

Automatically Calculated from Crew Capacities (Recommended Setting)

This choice sets Schedule Pro to add capacities for the depot(s) and, thus, for the company, based on the daily capacities for each Crew and the days of the week they work by default. This is recommended because it changes dynamically over time as crews are hired and leave. It also eliminates the need for manual entry of crew capacities. [See Installation Depots.](#) For an explanation on these calculations, click [here](#).

Manually Entered Depot Capacities

If this option is chosen, the installation depot capacity grid (*Schedule Pro>Utilities>Set Up>Installation Depots*) becomes editable. The number of feet, yards, etc. of each job type that can be installed in a day in that depot can be manually entered. If this method is chosen, the totals should be evaluated every few months as capacities change. If this setting is changed after jobs have been scheduled, those existing jobs will be set to deduct 1 crew for each job scheduled. [See Installation Depots.](#)



Notes:

The Installation Depot Capacities Based On setting can be switched back and forth, but any manually entered capacities (option 2) would have to be re-entered each time the setting is changed.

Adjust Installation Depot Capacity Levels-Day

Each day of the week, 100% of crew capacities can be shown as available on the **Schedule New Jobs** calendar, or the days of the week can be adjusted individually. By default, manually entered depot capacity will show for each day of the week, or crew capacities will be added up for depot totals based on their daily quantity limit and the days of the week that they work.

For example, if Schedule Pro is calculating capacities, and capacities are displayed by crew, for 10 carpet providers, each of whom can install 100 SY per day, and half of them work Saturday, at 100%, the Schedule New Jobs calendar will show 10 Crews on Thursday, 10 Crews on Friday, and 5 Crews on Saturday. If it is known that some providers will no-show on Friday, it can be adjusted down to 75% so that it will show 10 Crews on Thursday, 7.5 Crews on Friday, and 5 Crews on Saturday.

This can be used to set all days down to 95% to give a cushion against overbooking. This may be adjusted over time as Schedule Pro becomes more familiar.



Notes:

If all crews are set to have Sunday off, these don't need to be adjusted down at all, as there will be no depot capacity on Sunday.

After adjusting these settings, go to *Schedule Pro>Utilities>Maintenance>Reset Depot & Crew Capacities*.

Maximum Jobs per Day per Crew

This applies to all crews, regardless of capacity or of what has been entered in their individual crew record. This corresponds with the Warning Message called "Exceed Maximum Days per Crew." It works very simply: if "3" is entered in this field, it will trigger the warning any time a crew is scheduled for the fourth job for that day.

Use Linear Meters:

Select this option to use Linear Meters in calculations.

View Installation Depot Capacities By:

This first section pertains to the **Schedule New Jobs** screen, particularly the calendar on that screen that shows how much capacity is left available for each job type (i.e. Carpet or Vinyl) for each day in the next four or five weeks.

The program calculates available capacity by subtracting the amount already scheduled for that day from the footage or yardage, or subtracting a crew based on the average number of feet or yards a crew of that job type can install. The default must be set one way for the whole company.

Number of Crews Available

Choosing this option displays the capacity left available for scheduling in "Crews." If the average yardage for a carpet crew in the system setup is 125 SY, it will subtract 1 Crew for each 125 SY, regardless of how many crews are assigned to the job. It will subtract .8 crews for 100 SY in this example, and so on.

Quantity Available

This option displays the number of feet, yards, hours, or "each" available in that job type for a certain day. This is a good choice if the capacities of each crew vary a lot, as the actual yardage available on a day will give more information than the number of crews.

Deduct Crews from Installation Depot Capacities Based On



Notes:

This feature is only available if the "View Installation Depot Capacities by" switch is set to "Number of Crews Available":

Automatically Calculate based on Line Quantities (Recommended Setting)

This choice sets the Schedule Pro to deduct capacities from a provider's day and from depot capacities for that day based on the line quantities (those that are checked to be deduct capacity lines – See Job Types and Schedule New Jobs.) This is recommended because it allows taking advantage of the dynamic features of Schedule Pro that reduce capacities based on various different job types and unit of measure for a single job if it is set that way. Also, it allows taking advantage of warnings that are built in to prevent overbooking a person or a depot. Most users are scheduling using this setting.

Manually Enter Number of Crews to Deduct

If this option is chosen, a box appears when scheduling or editing job, in which the number of crews to deduct for a job for a certain day can be entered.

Deduct # of Crews	1.00
----------------------	------

In this box, the number of days times the number of crews can be added when a job is scheduled, and it will reduce the capacities of the crews chosen and the depot accordingly. It bypasses the usual deduct capacity methods used in Schedule Pro and puts the direct control of the days in the hands of the scheduler, but it also bypasses some of the safeguards against over-scheduling.

General

X>Utilities>System Options>Schedule Pro>General Category Authorization

Authorization

Type	Module	Applies To	Category	Option	Value
User	Schedule Pro	General	Authorization	Display System Settings Restrict Message as a Warning Message	User Specific Values
User	Schedule Pro	General	Authorization	Open Schedule Pro in Read Only	User Specific Values
User	Schedule Pro	General	Authorization	View Edit Default Store Only	User Specific Values

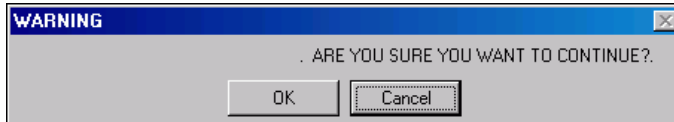
Type- Can be Global, Assigned or User

Display System Setting Restrict Message as a Warning Message

This functions as a "Manager override" for any Schedule Warnings that are set to the "Restrict" setting. For example, if a System Settings Warning is set to restrict, then a normal user tries to perform the action, they will get the following message, and will not be allowed to add the job to the schedule:



In the same scenario, a user with this box checked would only get a warning message, allowing the user to add the job at his or her discretion.



Open Schedule Pro in Read Only

To set up a certain workstation or user for Read Only access to Schedule Pro, click the button labeled "**ENABLE READ ONLY SETTING**" and choose "Always." Close and reopen the Schedule Pro, it will now be in read only mode. The **Enable Read Only** button should be password protected so that the Read only setting cannot be changed by anyone without the password. Opening Schedule Pro in Read Only Mode from Order Entry - will now open View Schedule Jobs and display related jobs if scheduled jobs exist.

An administrator may want to be able to see both Read only and full edit modes at different times. In this case, choose Select on Open, and a prompt to choose an edit mode will display whenever Schedule Pro is opened.

Read only users have access to fewer options as illustrated in the File menu example.

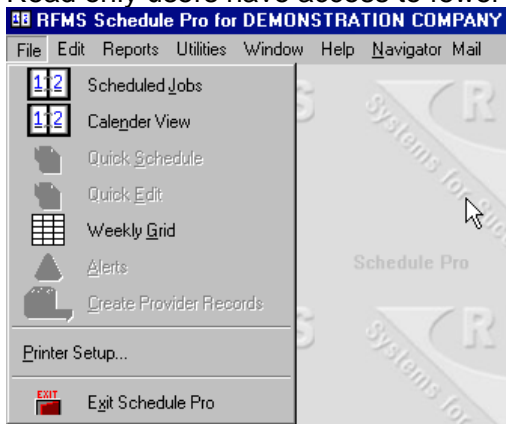


Figure: Read Only File Menu

Instead of the Schedule New Jobs screen, they have a Calendar View Screen listing the scheduled jobs and quantities left available.

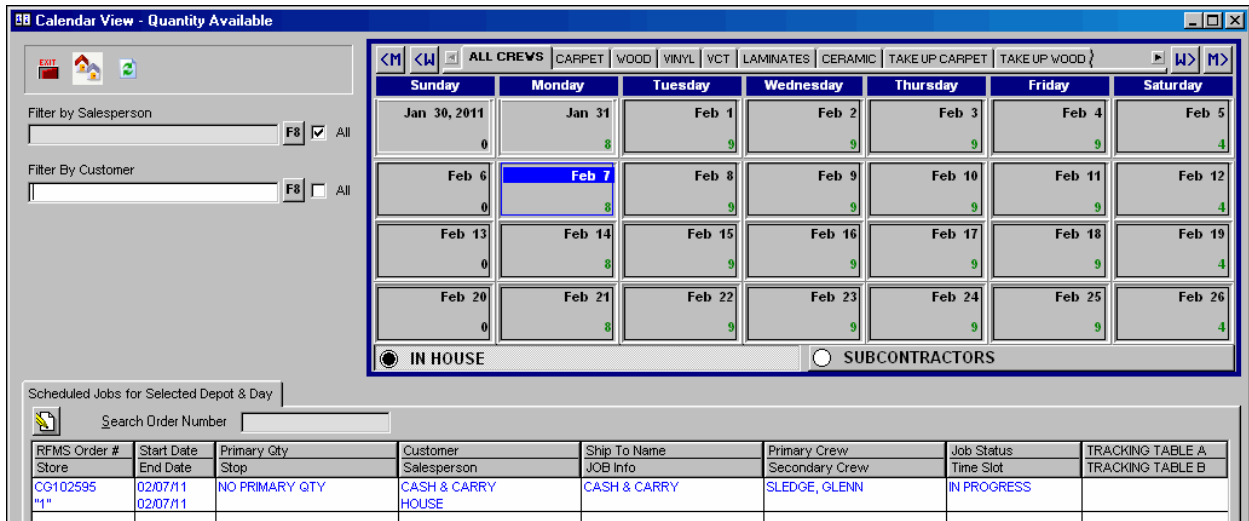


Figure: Read Only Calendar View



Notes:

Users viewing Schedule Pro in Read Only mode will not count against the Schedule Pro user count.

View Edit Default Store Only

If multiple users will be scheduling for their own Store Code and should not have access to view other Store Codes, this option, in tandem with the Current Store option will lock the user down into their Current Store Code.

Before turning this feature on, be sure to have the correct “Current Store” selected in system options.

Configuration

Schedule Pro>Utilities>System Options>Schedule Pro>General Category Configuration or X>Utilities>System Options>Schedule Pro>General Category Configuration

Type- Must be Global

	Global	Schedule Pro	General	Configuration	Quick Schedule Display Time Slot Totals 1	2 DAYS
	Global	Schedule Pro	General	Configuration	Quick Schedule Display Time Slot Totals 2	1 DAY

Quick Schedule Display Timeslot 1 & 2

Choose from the predefined [Job Time Slots](#)– Cannot be edited manually. This defines the time slots which will be tallied on the [Quick Schedule Screen](#).

Default Filters

X>Utilities>System Options>Schedule Pro>General


Type- Can be Global, Assigned or User

Type	Module	Applies To	Category	Option	Value
User	Schedule Pro	General	Default Filters	COLLECT CHECK	ALL
User	Schedule Pro	General	Default Filters	CONFIRMED	ALL
User	Schedule Pro	General	Default Filters	Date Filter	Range
User	Schedule Pro	General	Default Filters	General Filter Job Status	ALL
User	Schedule Pro	General	Default Filters	Installation Depot	
User	Schedule Pro	General	Default Filters	Job Time Slot	
User	Schedule Pro	General	Default Filters	Job Type	
User	Schedule Pro	General	Default Filters	Select Order Screen Default Order Type	Current Original
User	Schedule Pro	General	Default Filters	Select Order Screen Default Tab	ORDER
User	Schedule Pro	General	Default Filters	Sort By	CREW
User	Schedule Pro	General	Default Filters	Store Filter	All Stores



Figure: Default Filters

General Filters

The Scheduling Grid, View Scheduled Jobs, Report Menu, and other screens have a Find

button. 

The set up in this screen determine how these filters will be set when the screen is first opened. This is a time saving tool. The filter settings can be changed while the screens are open, but will revert back to the defaults the next time the screen is opened. To go back to the default settings

while still in the screen, use the reset button.  The clear filter button  will set the find to include all records.



If experiencing slowdowns in Schedule Pro, setting more filters to blank should improve system performance speed.

User Defined 1 & 2

Under the General Filters section, if User Defined 1 and 2 fields are not used, set this to "All." This will prevent filtering based on an unused field. If User Defined 1 or 2 has been renamed to be able to use it to say whether a job is "Business Sector = R" or has been "Confirmed," for example, choose to filter on these each time a screen is opened. If expected records are not found, check the filter settings. In this case, be sure to switch both to "All" in the yellow filter box to show jobs, regardless of the value of these switches.

Date

There are three options here:

Specific

This defaults to one specific date. With this selection, when opening View Scheduled Jobs or the Report Menu, for example, they will automatically be filtered to the current date. A different single date can then be chosen.

Range

This defaults to a date range, which will initially be set for beginning with the current date and two weeks forward. Again, once in the screen, the start and end dates can be changed to a different date range. This is the recommended setting if speed is not a huge issue. (Reports will default to using range regardless of the setting here.)

All

This doesn't filter based on date at all. This will work best for opening screens quickly if speed is an issue. On the View Scheduled Jobs screen, all jobs will appear in the browse box, but the first job for the current day will be highlighted.

General Filter Job Status

This field allows selection of one of the Job Statuses from the Job Status list as the default when using the custom filter option throughout the Schedule Pro module. For example, select "In Progress" to automatically filter out jobs of any other status.

Installation Depot

This works the same way as the store code filter. If scheduling for one depot, to see that depot only, select it here. To view the whole schedule, select all.

Job Time Slot

This pulls from the Job Time Slots list, and allows filtering by only one job time slot as a default. The recommended setting for this filter is to leave it blank.

Job Type

This will automatically apply a filter based on one of the Job Types set up for Schedule Pro. If Carpet Jobs are the only ones scheduled, for example, apply this filter to automatically filter down to just carpet jobs whenever a screen to view jobs or run reports in Schedule Pro is opened.

For a repair job, for example, that has no lines in product codes that are associated with the Carpet Job Type; it will be filtered out using the Job Type filter. A job must have at least one line with the Job Type selected to appear once this filter is applied.

The next two options select the default filter for the Select Order to Schedule Screen

Clicking the **F8** button on the Schedule New Jobs screen to pull up an RFMS Order, gives options for the filtering that display.

The screenshot shows the 'Select Order to Schedule' window. At the top, there are icons for 'EXIT', 'Send Order & Lines to Scheduled Job', and a refresh icon. Below that is a 'Filter' section with 'Store' set to 'F8' and 'Orders' set to 'Current Original'. The 'Orders' section has radio buttons for 'All', 'Current Original', 'Current Claims', and 'Job Costed'. Below the filter is a table with columns: 'RFMS Order #', 'Est Del Date', 'Customer', 'Customer PO #', 'Work Phone', 'JOB # PRMP', 'Ship To Name', and 'Ship To'. The 'RFMS Order #' column is highlighted. There is also a 'Search Est Del Date' input field.

Select Order Screen Default Order Type Type- Can be Global, Assigned or User

The selection made here will set the default order type shown. Selecting a different option will temporarily display a different list of orders.

All

This doesn't filter based on whether the RFMS Order is an original order, a claim, or a job costed order. This is the speediest way to pull up the list of jobs.

Current Original

This filters out all Job Costed orders and all Claims. If scheduling for Job Costed orders is not allowed this makes the most concise list. However, this option may cause a delay on some workstations.

Current Claims

This will pull up open orders from the RFMS claims module only, and would only be a good filter for someone who is scheduling service and/or claims only.

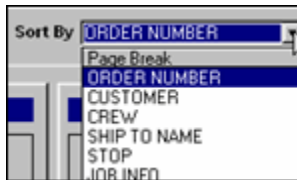
Select Order Screen Default Tab

Type- Can be Global, Assigned or User

Once a list of the RFMS Orders from Order Entry is displayed, there are various tabs with different sorts and search options that help locate the correct job to schedule. Choose which one comes up by default in this list, for example, choose to sort by Estimated Delivery Date.

Sort By

This sets up a sort for any reports printed (with a few exceptions, like Crew Names & Contacts, that have their own sort hardcoded). Options include: Order Number, Customer, Crew, Ship to Name, Stop, or "Job Number", which is a user defined field in RFMS, and may be called "Side mark," "Job / Lot," "Add'l Info" or something else.



Store

This field allows selection of "Current Store" or "All Stores" as the default when using the custom filter option throughout the Schedule Pro module. If a user always schedules for Store Code "1" in Phoenix and should not see any of the jobs scheduled for Store Code "2" in Tucson, for example, filter to Current Store, and they will always see Store Code "1" jobs as long as the last job they were working with was a Store Code "1." If a user schedules all jobs regardless of Store Codes, leave this set to All Stores.

Default Values

Schedule Pro>Utilities>System Options>Schedule Pro>General>Default Values or X>Utilities>System Options>Schedule Pro>General>Default Values

Type- Can be Global, Assigned or User

Type	Module	Applies To	Category	Option	Value
User	Schedule Pro	General	Default Values	Default User	
User	Schedule Pro	General	Default Values	Schedule Pro Default Store	"2" - DEMO STORE

Default User

This will save time in data entry, as a name must be entered each time a job is added or edited in Schedule Pro. First click "Edit User Name". Select a user. For a person to be included in the pick list, they must be checked as a Scheduler in RFMS Human Resources.

Schedule Pro Default Store

This displays the store code setting that is current in Schedule Pro. If default filters are set to a certain store code, the Current Store can be changed here. It can also be changed at various places throughout the program that have this icon:

Display

>Utilities>System Options>Schedule Pro>General>Display

Type- Can be Global, Assigned or User

Type	Module	Applies To	Category	Option	Value
User	Schedule Pro	General	Display	Display Availability on Schedule New Jobs Calendar	User Specific Values
Global	Schedule Pro	General	Display	Limit Quick Edit Screen to 1 Store or 1 Depot at a Time	No
User	Schedule Pro	Scheduling Grid	Display	Display Crew Availability Dots on Select Crew Screen and Grids	User Specific Values
User	Schedule Pro	Scheduling Grid	Display	Display Material Status Delta on Grids	User Specific Values

Display Availability on Schedule New Jobs Calendar

This will turn off the color coded "Crews" or "Quantities" that display whether the crews in the depot is already booked or fully booked for the day in question. This option has will make the Schedule New Jobs screen open and run faster.

Limit Quick Edit Screen to 1 Store or 1 Depot at a Time

The Quick Edit screen allows filtering to a batch of jobs based on Date Ranges, Store Codes, Depots, Job Types, and other criteria and then tagging and editing those batches of jobs. The Primary Crew, Job Status and other information can be changed. If a user is scheduling for one Store Code or one Depot, to avoid the risk of editing the jobs for other Store Codes or Depots that might be kept separate at the company, check this box. This will require a Store Code or Depot selection before allowing any batch edits. For one Store Code, leave this box unchecked to avoid having to make unnecessary selections on the Quick Edit screen.



Notes:

- Before turning this feature on be sure to have the correct current store selected. Both the **Edit View Current Store Only** and the **Edit Current Store** buttons will need to be password protected.
- The 4 **update and delete alert** buttons in the **Alerts** screen will affect all jobs, not just those that are for the current store, even with this setting in place. Password protect these buttons as needed.

Display Crew Availability Dots on Select Crew Screen and Grids

Setting this to yes will turn on the color coded dots that display whether the crew is already booked or fully booked for the day in question. A black dot will still be displayed for days crews are off or unavailable. This option has been added for those users who are looking for an increase in speed.

Display Material Status Delta on Grids

Setting this option to yes will display the material status indicators on the **detailed** grid. This refers to: material status triangle color coded icons.

Interface

>Utilities>System Options>Schedule Pro>General>Interface

Type	Module	Applies To	Category	Option	Value
User	Schedule Pro	General	Interface	Enable Drag and Drop	User Specific Values
User	Schedule Pro	General	Interface	Job Schedule Screen from Order Entry	User Specific Values
User	Schedule Pro	General	Interface	Screen to Display on Start Up	User Specific Values

Enable Drag and Drop

To Enable Drag and Drop on the Scheduling Grid for this user, click "Edit Drag and Drop" and check the box.

Job Scheduled Screen from Order Entry

A simple version of the Schedule New Jobs Screen is now available. The selection of which to use is made here.

The Simple Job Schedule Screen

Screen to Display on Start Up

Choose the screen to automatically open without having to go to the file menu first when opening Schedule Pro.

Prompts

>Utilities>System Options>Schedule Pro>General>Prompts

Type	Module	Applies To	Category	Option	Value
Global	Schedule Pro	General	Prompts	Tracking Table 1 Description	TRACKING TABLE A
Global	Schedule Pro	General	Prompts	Tracking Table 2 Description	TRACKING TABLE B

Figure: Prompts

Type- Must be Global

Tracking Table 1 and 2 Description

These can be up to 30 Characters. Tracking Table 1 and 2 allow tracking and reporting on scheduling activity. This tracking or categorizing of scheduled jobs is user definable. The data entry in this field is names that category.

The [options](#) for these tables will be added later in the set up process.



Notes:

To assign tracking to a scheduled installation, click the **F8** button for the tracking field that is located in the lower right hand portion of the Schedule New Jobs screen. See Scheduling Jobs.

Reporting

>Utilities>System Options>Schedule Pro>General>Reporting

Type	Module	Applies To	Category	Option	Value
Global	Schedule Pro	General	Reporting	Company Name for Reporting	DEMONSTRATION
User	Schedule Pro	General	Reporting	Default Path for CSV Reports	r\

Figure: Reporting

Company Name for Reporting

Type- Must be Global

This can be up to 50 Characters. When Schedule Pro is licensed, the company name will be filled in from the RFMS Company Information file. This field prints on the footer of all reports. The Company Name CAN be edited so that it differs from that of "regular" RFMS on Screens and Reports.

Order Number	Customer	Ship To Name	JOB # PRMP	Primary City
SUNDAY				
CG102596	KIMBERLY LEE	LEE, KIMBERLY	REGRESSION 10.6.1 HF	NO PRIMARY CITY
CG601698	HAMNER CONSTRUCTION	HAMNER CONSTRUCTION	2 OAK CREEK, TUSC	WOOD 1224 SF
CG601939	LEAVELLE, FAYE	LEAVELLE, FAYE		VINYL 696.94 SF

10/30/12 11:50 AM

COMPANY NAME FOR REPORTING

Default Path for CSV Reports:

Each user can set the location for any reports they “print” to a file, rather than to paper.

Warning Message

>Utilities>System Options>Schedule Pro>General>Warning Messages















Warning When Changing Stores

If a user schedules orders related to various RFMS store codes, but they are not separated by store code for scheduling purposes, turn this checkbox off so the system will allow switching between store codes without generating a warning.

For different store codes for different locations, with some users only scheduling for one of those store codes, this warning will be sure they know if they accidentally pull a job from Order Entry that is in a different store code:

Order Entry

>Utilities>System Options>Schedule Pro>Order Entry

Type	Module	Applies To	Category	Option	Value	Note
User	Schedule Pro	Order Entry	Authorization	Allow User to Edit Order Entry Notes	No	
 Global	Schedule Pro	Order Entry	Data Transfer	Allow Job Costed Orders to be Scheduled	Yes	
 Global	Schedule Pro	Order Entry	Data Transfer	Automatically Set Order Entry Line Status	Delivered	
 Global	Schedule Pro	Order Entry	Data Transfer	Automatically Tag the Order Lines	All Lines	
 Global	Schedule Pro	Order Entry	Data Transfer	Base Schedule Pro Install Date on the Order Header Estimated	Yes	
 Global	Schedule Pro	Order Entry	Data Transfer	Update Estimated Delivery Date with the Status of Cut	Yes	
 Global	Schedule Pro	Order Entry	Data Transfer	Update Estimated Delivery Date with the Status of Delivered	No	
 Global	Schedule Pro	Order Entry	Data Transfer	Update Estimated Delivery Date with the Status of GenPo	No	
 Global	Schedule Pro	Order Entry	Data Transfer	Update Estimated Delivery Date with the Status of None	No	
 Global	Schedule Pro	Order Entry	Data Transfer	Update Estimated Delivery Date with the Status of On Order	No	
 Global	Schedule Pro	Order Entry	Data Transfer	Update Estimated Delivery Date with the Status of Reserved	No	
 Global	Schedule Pro	Order Entry	Data Transfer	Update the Order Header Estimated Delivery Date	No	
 Global	Schedule Pro	Order Entry	Data Transfer	Update the Order Line Estimated Delivery Date	Yes - Update Order Entry Lines	
 Global	Schedule Pro	Order Entry	Data Transfer	Do Not Consider Order Entry Lines that are Not Scheduled	Yes	Depends on the "Update the Order Header Estimated Delivery Date" Setting
 Global	Schedule Pro	Order Entry	Data Transfer	Overwrite Header Est Del Date with Blank Date or Past Date	No	Depends on the "Update the Order Header Estimated Delivery Date" Setting

Type- Can be Global, Assigned or User

Allow User to Edit Order Entry Notes

Setting this option to yes will allow this user to edit the Notes attached to the RFMS Order. This includes the RFMS Order Internal Notes, RFMS Order Custom Notes, RFMS Work Order Custom Notes, RFMS Order Line Notes and RFMS Work Order Line Notes.

Type-Must be Global 

Allow Job Costed Orders to be Scheduled (Yes / No Option)

Most companies set this to NO. The one reason to have this switch set to Yes is the ability to pull over an Order Header to schedule a non-warranty or non-paid repair that is not being entered in Order Entry.

Automatically Set Order Line Status

No

Does not change the line status

Cut

The line status will automatically be changed to **cut** when the provider record is created by checking this box.

Delivered

The line status will automatically be changed to **delivered** when the provider record is created by checking this box.

Automatically Tag Order Lines when Scheduling New Jobs

This setting refers to the way an order first pulls in the Schedule Pro in the Schedule New Jobs screen.

No Lines

If multiple “trades” are entered on an order, this would be the best choice. This pulls the lines over untagged, and the person doing the scheduling can tag the lines they’d like to schedule.

All Lines

If the orders are generally entered separately for Carpet, Vinyl, Hardwood, and so on, this is the best choice. When an order is pulled into Schedule Pro, all the lines are already tagged.

This example is a group of lines in the Schedule New Jobs screen that were pulled in with “All Lines” selected. They are all tagged, even though there is a ceramic line that will probably be scheduled separately from the carpet.

										Telephone 1	555-554-8979
										Telephone 2	555-554-8982
										Deduct # of Crews	1.00
	RFMS Line #	DC	PC	Job Type	Style	Color	Description	Qty	Units	Line Status	
	1		01	CARPET	12' CARPET SOLI	BEIGESTON	Group 3	7,053.96	SF	NONE	
	2		01	CARPET	12' CARPET SOLI	PEACH255	Group 12	2,883.00	SF	NONE	
	3		01	CARPET	12' CARPET SOLI	LIGHTOLIVE	Group 5	1,901.04	SF	NONE	
	7		06	CERAMIC	CERAMIC 18"X18'	GREEN154	Elevator Lobby	571.52	SF	NONE	
	8		06	CERAMIC	CERAMIC 18"X18'	MAUVE233	Elevator Lobby	182.25	SF	NONE	

Deduct Capacity Lines Only

This setting is for those who don’t want to put all the lines from an order onto their schedule. They are scheduling based on “Deduct Capacity” lines only, which can be either primary service lines or primary material lines, depending on how Job Types are set. This, too, is a better choice if the various flooring types are entered on separate orders rather than many types on one order.

Base Schedule Pro Install Date on the Order Header Estimated Delivery Date

This option allows “Estimated Delivery Date” to be a kind of default or “suggested date” when scheduling an order that has an Estimated Delivery Date already in the Order Header. A different date can still be chosen for installation.

Update the Order Line Estimated Delivery Date

This option determines whether the scheduled date of the individual order *lines* updates the Est. Del Date on the line in Order Entry. This won’t apply to orders scheduled before Schedule Pro

was licensed, but will apply to new or edited jobs. Keep in mind the appropriate status boxes must be checked.

No- This will not update line dates.

Yes- Update Line Dates for lines with the Statuses Below - (Order Entry Job Line Statuses are listed)

Recommendation: If update Line Dates is chosen, it makes sense to update for all statuses to be consistent.

Update the Order Header Estimated Delivery Date

This determines whether the Estimated Delivery Date in the Order *Header* gets updated based on Schedule Pro dates.

No Schedule Pro will not update the Order Header Estimated Delivery Date.



Notes:

Keep in mind that if Schedule Pro is updating line dates in the setting above, the Order Entry “Auto Post Estimated Delivery Date” system option may update the header date based on these line dates anyway. See Order Entry Configuration in the RFMS User Guide to read further. If both of these date integration switches in Schedule Pro are turned on, it is best to set Auto Post Est Del Date in System Options to No.

Yes- Use Order Entry Lines Only

This updates the Order Header Estimated Delivery Date based on Order Lines that are scheduled. With this setting, the header date will always show the NEXT thing happening on that order. For example, if hardwood is scheduled on 6/15 and carpet on 6/20, on 6/10, the header date will display the 15th, and on the 16th, the header date will roll forward to displaying the 20th, and so on.

Yes- Use Order Entry Lines and Schedule Pro Temporary Lines

This setting is just the same as the one above (Jobs with RFMS Order Lines Only) except that it also looks at the dates on “Temporary Lines” – lines that are entered in the Schedule Pro but do not exist in order entry – related to the order when deciding which date is coming up next on that order.

Do not consider Order Entry Lines that are not scheduled









Dates can be entered onto order lines by means other than scheduling. This checkbox helps the Order Header Estimated Delivery Date keep current even with date changes in Schedule Pro. It tells the system to look ONLY at lines that are on the Schedule Pro when determining the Header Date. This way, even if there are a few lines for supplies or billing purposes in the Order that have a line date that was included when the line was added, the dates from these lines won't affect the header date if the job gets moved.

Overwrite Header Estimated Del Date with Blank or Past Date

By default, if the above switch is enabled to handle the date in the Order Header, the program will keep the Order Header Est Del Date updated, unless a job is changed to a date that has passed (in the case of correcting an error on the schedule after the fact) or the job has been deleted from the schedule. If this box is checked, it will keep the Header Date updated in all cases, even a change to the past or to a blank date.

Providers

>Utilities>System Options>Schedule Pro>Providers

Type	Module	Applies To	Category	Option	Value
Global	Schedule Pro	Providers	Configuration	Populate Hours From Job Into Providers Regular Time Field	Yes
 Global	Schedule Pro	Providers	Data Transfer	Allow Provider Rate Override	No
 Global	Schedule Pro	Providers	Data Transfer	Automatically Set Product Code to 00	No
 Global	Schedule Pro	Providers	Data Transfer	Automatically Set Rate to 0	Never
 Global	Schedule Pro	Providers	Data Transfer	Combine Split Lines Display on Last Install Date	Yes
 Global	Schedule Pro	Providers	Data Transfer	Create Provider Records for Labor Lines with No Crew Scheduling	Warning
 Global	Schedule Pro	Providers	Data Transfer	Post Load to Provider Rate for Subcontractors	No
 Global	Schedule Pro	Providers	Data Transfer	Provider Work Order Number Field	Empty
 Global	Schedule Pro	Providers	Data Transfer	Use Units and Dates From	Actual Fields
User	Schedule Pro	Providers	Default Filters	Include Provider Records	User Specific Values
User	Schedule Pro	Providers	Default Filters	Include Temporary Provider Lines	User Specific Values
Global	Schedule Pro	Providers	Default Filters	Provider Job Status	FINISH

Populate Hours from Job into Providers Regular Time Field

Type-Can be Global, Assigned or User

If option is set to Yes, when creating provider records it saves the hours from the job into the regular time field in the provider record.

It also follows the switch to “Use Units and Dates From” either Actual or Scheduled, and the switch to “Combine Split Lines and Display on Last Install Date.”

If the hours for a job are 9 or more, an hour is removed for lunch. For example, 8 am -5 pm=9 hours, but 8 will be posted.

Allow Provider Rate Override

Type-Must be Global 

Setting this option to yes allows the rate on individual provider records to be edited before sending them to order entry.

Automatically Set Product Code to 00

Type-Must be Global 

By default, this option is set to no. Typically, a provider record has the same Product Code as the line it is related to, and this allows easily seeing whether labor costs are balancing with the order. If this option is set to yes, it will send the provider records with a PC of “00” so they can be sent to Accounts Payable if not being paid through the HR module.

Automatically Set Rate to 0(Select One)

Type-Must be Global 

Never (Default)

If the provider record should use the “Cost” from the Order Line for the rate to pay the provider, or if providers are hourly, leave this set to “Never.” This is the default.

Always

Otherwise, the provider records can set the per unit rate to “0” (to be manually filled in later) for all records.

Subcontractors Only

For only for those installed by crews set as “Subcontractors” in the Human Resources / Worker Information file.

Combine Split Lines & Display on Last Install Date

Type-Must be Global

This gives the ability to recombine the split lines back together for creating the provider records. The quantity for split lines that have the same:

- Line Number
- Crew Name
- Job Type
- Style

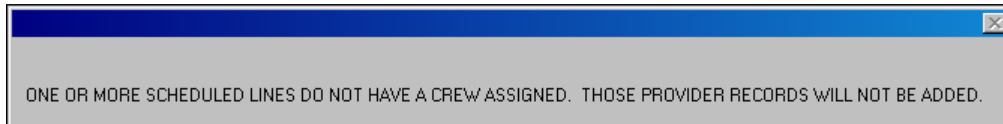
Will be added together. This total quantity will be used to create the provider record with an install date of the last day that the line was scheduled.

When using this feature, the Create Provider Records browse will only show scheduled lines if they are on the last day that the line was scheduled and the total quantity will be displayed.

Create Provider Records for Labor Lines with No Crew Scheduled

Type-Must be Global

With “create provider records with no crew scheduled” in *Utilities>System Options>Schedule Pro>Providers>Create Provider Records for Labor Lines with No Crew Scheduled* set to restrict, previously users were not warned that no provider record was created. Now there will be a message to inform the user if records were not created.



Post Load to Provider Rate for Subcontractor's

Type-Must be Global

Checking this box will allow a load in to some provider records automatically. Load here is treated differently than in Order Entry so an access code is required to select this option to ensure that it is understood that this selection will pay (Rate + load) to non-hourly providers. The work order labor rate will be added in the order line load where applicable.

It will cause the Load field to be used as follows when creating provider records:

Subcontractors:

Provider Rate = Line Rate (Cost) + Line Load

Provider Load = 0

Employees (Non Hourly):

Provider Rate = Line Rate

Provider Load = Line Load

Employees (Hourly):

Provider Rate = Hourly Rate

Provider Load = 0

Provider Work Order Number (Select One)

Type-Must be Global

Empty

This leaves the Work Order Number field empty so a provider invoice number can be added later if needed.

Service Description

This choice puts the “Service Description” of the Labor Line in the Work Order Number field in the Provider Record. This description will be truncated if it is more than 10 characters long. It is a nice way to show what the provider is getting paid for on the reports.

Order Number

This puts the Order Number (CG number) into the Work Order Number field.

Use Units and Dates From

Type-Must be Global 

Scheduled Fields (Recommended Setting)

This pulls the Install Date in the Provider Record from the date that the job was scheduled. If this setting is chosen, it means that the Scheduled Dates will also be used as the Install Date. After the jobs have been installed, the Scheduled Dates can be edited to reflect what actually happened, and only one set of dates has to be maintained.

Actual Fields ([See Edit & Complete / Actual Fields](#))

This pulls the Install Date in the Provider Records from the date fields labeled “Actual Fields” in Schedule Pro, which are only used by a few users. When choosing use these, a second set of dates must be filled in after the job has been completed to note what the Actual Install Date was, regardless of the Scheduled Date.

Providers- Category Default Filters

>Utilities>System Options>Schedule Pro>Providers

These three options set up the default filters for the screen in Schedule Pro that allows creating Provider Records. This screen also defaults to showing today as the install date. Changes can be made to include other records once on the screen; these settings are just the default.

Global	Schedule Pro	Providers	Default Filters	Default for Job Status Filter on Create Provider Records Screen	ALL
User	Schedule Pro	Providers	Default Filters	Default for Show Records Filter on Create Provider Records Sc	User Specific Values
User	Schedule Pro	Providers	Default Filters	Default for Temporary Lines Filter on Create Provider Records S	User Specific Values

Type-Can be Users, Assigned or Global

Default for Show Records Filter on Create Provider Records Screen

The recommended default setting is Not Created. This shows only labor lines that haven't already been turned into provider records. This is to prevent someone from accidentally sending the same record over to the Providers Module twice. While in the Create Provider

Records screen, this can be changed to "Created" or "All" temporarily to see which ones have already been created.

Default for Temporary Lines Filter on Create Provider Records Screen

The recommended default setting is "No" or unchecked. A Temporary Line is a line that is entered in the Schedule Pro but doesn't exist in Order Entry. Usually, creating a provider record from this type of line is NOT done. This is because although there may be a quantity and crew associated, there is no cost associated with this line.











(This does not include temporary lines on jobs without an associated customer order.)

Default for Job Status Filter on Create Provider Records Screen

This filter will default to the "All" status, so it will show all labor lines for jobs scheduled on the selected day. Our recommended setting is to set the default to "Completed." This forces the Schedule Pro user to review jobs after receiving an invoice from a provider and changing them to the Completed status before provider records are created.

Schedule Pro

>[Utilities](#)>[System Options](#)>[Schedule Pro](#)>[Schedule Pro](#)

Type	Module	Applies To	Category	Option	Value
 Global	Schedule Pro	Schedule Pro	Configuration	Crew Name Format from Worker Information File	Last Name, First Name
 Global	Schedule Pro	Schedule Pro	Prompts	Reference Prompt	Reference
 Global	Schedule Pro	Schedule Pro	Prompts	User Defined Field 1 Choice 1	N
 Global	Schedule Pro	Schedule Pro	Prompts	User Defined Field 1 Choice 2	Y
 Global	Schedule Pro	Schedule Pro	Prompts	User Defined Field 1 Choice 3	DK
 Global	Schedule Pro	Schedule Pro	Prompts	User Defined Field 1 Prompts	CONFIRMED
 Global	Schedule Pro	Schedule Pro	Prompts	User Defined Field 2 Choice 1	N
 Global	Schedule Pro	Schedule Pro	Prompts	User Defined Field 2 Choice 2	Y
 Global	Schedule Pro	Schedule Pro	Prompts	User Defined Field 2 Choice 3	DK
 Global	Schedule Pro	Schedule Pro	Prompts	User Defined Field 2 Prompts	COLLECT CHECK

Type- Must be Global 

Crew Name Format from Worker Information File

This sets up the default format for pulling in Crew Names from [Accounting](#)>[Human Resources](#)>[Worker Information](#) when initially adding crews to the Schedule Pro. If "Worker Number" is not used in HR, the choice is between Last Name and First Name first. If a "Worker Number" is used, it can be listed before the actual name in the Crew Name field, and, then followed by "Last Name, First Name" or "First Name, Last Name."

Reference Prompt

This field is generally one that isn't linked to anything in Order Entry and is used to enter any kind of invoice or work order number for jobs that are scheduled manually (that aren't in Order Entry for some reason.) To use this field for another purpose, rename it here. Keep in mind this field can always be viewed with the scheduled jobs on the screen, but it does not print on many reports.

User Defined Field 1 and 2 Prompts, Choices 1, 2, and 3

These two fields are user definable. These fields are Yes / No or A / B / C options. They can be used for filtering jobs throughout the various viewing screens and reports.

Often, these are used to indicate whether a job has been confirmed or whether a job is Retail, Builder or Commercial. Then the choices are defined to correspond with these prompts. See the before and after examples.

Before setting up user defined 1 & 2	After setting up user defined 1 & 2
User Defined Field 1 Prompts: USER DEFINED 1 Choice 1 <input type="text" value="NO"/> Choice 2 <input type="text" value="YES"/> Choice 3 <input type="text" value="DK"/>	User Defined Field 1 Prompts: BUSINESS SECTOR Choice 1 <input type="text" value="R"/> Choice 2 <input type="text" value="B"/> Choice 3 <input type="text" value="C"/>
User Defined Field 2 Prompts: USER DEFINED 2 Choice 1 <input type="text" value="NO"/> Choice 2 <input type="text" value="YES"/> Choice 3 <input type="text" value="DK"/>	User Defined Field 2 Prompts: CONFIRMED Choice 1 <input type="text" value="N"/> Choice 2 <input type="text" value="Y"/> Choice 3 <input type="text" value="DK"/>

To use one or both of these fields to modify Schedule Pro jobs, set the System Options, Schedule New Jobs defaults to define how these will default when adding a new job, and set filters to show certain data based on this field when the Scheduling Grid, View Scheduled Jobs screen, or the Report menus are first opened.

These User Defined fields can easily be used for filtering. For example, the person who confirms the installations screen could be set to show only jobs that have confirmed set to "No" and could run through the "Don't Knows" from time to time. For someone who only deals with commercial jobs, their screens could be set to show only jobs where "Business Sector" = "C."

Scheduling

>Utilities>System Options>Schedule Pro >Scheduling>

Configuration

Type	Module	Applies To	Category	Option	Value	Note
Global	Schedule Pro	Scheduling	Configuration	All Crews Tab Position	First Tab	
User	Schedule Pro	Scheduling	Configuration	ALTERNATE LIST	User Specific Values	
Global	Schedule Pro	Scheduling	Configuration	Always Default to Store (Clear to use Current Store)	"1" - MY NEW STORE	
User	Schedule Pro	Scheduling	Configuration	Automatically Select Depot	User Specific Values	
Global	Schedule Pro	Scheduling	Configuration	Job Status - Initial Value	CONTINUED	
User	Schedule Pro	Scheduling	Configuration	Job Time Slot - Initial Value	User Specific Values	
Global	Schedule Pro	Scheduling	Configuration	Jobs Scheduled for Depot Day - Default Tab	CREW	
User	Schedule Pro	Scheduling	Configuration	Jobs Scheduled Start End Times	User Specific Values	
User	Schedule Pro	Scheduling	Configuration	Order Type	User Specific Values	
User	Schedule Pro	Scheduling	Configuration	SERVICE REASON	User Specific Values	
Global	Schedule Pro	Scheduling	Configuration	Skip Day when All Scheduled Crews Off	Yes	
Global	Schedule Pro	Scheduling	Configuration	Skip Saturdays	Yes	
Global	Schedule Pro	Scheduling	Configuration	Skip Sundays	Yes	
User	Schedule Pro	Scheduling	Configuration	UD Field 1	User Specific Values	
User	Schedule Pro	Scheduling	Configuration	UD Field 2	User Specific Values	

Type- Can be Global, Assigned or User

All Crews Tab Position

In the Schedule New Jobs screen, there are tabs for each job type, and these tabs each display a calendar showing how many crews or how much quantity is available to be scheduled on each day. In addition to these Job Type tabs, there is an "All Crews" tab, which shows the big picture view of all crews. This order of this tab can be changed depending on the frequency used.

Always Default to Store (Clear to Use Current Store)

As the parenthetical suggests, for a normal user who can schedule for any store code, or in a case where there is one store code and the store code selection is not an issue, leave this field blank.

To limit a user to one store code: If a store code is selected here, the user will not be able to select jobs from another store code on their workstation without changing this setting. To keep the user from changing their store code, password protect the **F8** button and the **Eraser** button next to this field.

Automatically Select Depot

For a normal user using one depot, which is secondary, like a "Service" depot select one here to make the secondary depot for the store code the default. Typically, however, the default for the depot will come from the store code of the job, so the recommended setting is to leave this set to Primary.

User Defined 1 & 2 (Field Defaults)

These two fields may be called something else if they have already been defined. They usually have the choices of "Yes," "No," or "DK" (don't know.) These choices are user defined as well. Regardless, each of these can be set to a default for new jobs. For example, jobs are scheduled and then confirmed later; defined one user field as "Confirmed," with the default setting to be "No."

Job Status Initial Value

Most users start their jobs in the "In Progress" status.

Job Time Slot Initial Value

This, again, is to save time on data entry. Select the most frequently used time slot here, and it will only have to be changed if another time slot is used on a job.

Jobs Scheduled for Depot & Day – Default Tab



Crew	Order	Customer	Ship To Name	Order # / Ref	Crew Name	Start Time	End Time	Primary Qt
				CG800016	CREW 1	8:00 AM	5:00 PM	NO PRIMA

In the Schedule New Jobs screen, beside the calendar that shows availability, there is a list of jobs scheduled for that depot and day (and job type, depending on what is selected on the calendar.) This list of jobs has four tabs corresponding to four different sorts: Primary Crew, Order, Customer, or Ship To Name. This field allows the default sort to be defined.

Jobs Scheduled – Start and End Times

In the Schedule New Jobs screen's list of jobs scheduled for that depot and day (see field above), there are fields for Start Time and End Time. This setting determines whether those fields will be populated from the Start and End Time of the job's "Time Slot" or the Start and End Time of the first line scheduled on the job. In most cases, these are the same, but some users manually edit line times after scheduling with a generic time slot.

Order Type (Field Default)

The first step in entering a job is to choose whether the order will be exported from RFMS Order Entry, from RFMS Claims, or entered by hand because no order exists. To enter a job by hand, select "Customer" in this toggle box, then enter the job manually using temporary lines.

If this option is selected, the "Customer" field becomes one of the defining pieces of information to locate this job. A customer can be selected from the RFMS Customer file using the **F8** button, or just enter a Customer name in manually. This is usually set to default to "RFMS Original."

Skip Saturdays, Skip Sundays. Skip Day When All Scheduled Crews Off

These are, again, default settings, and can be changed on a job by job basis. Most users skip Sundays and days when they've scheduled all crews off. When a job is split over multiple days, these checkboxes will define which days are skipped as the quantities are distributed over multiple days.

Tracking Tables 1 & 2















These two fields may be called something else if they have been defined in set up. Both fields labels and choices are user defined. To have a default value, enter it here.

Deduct Number of Crews (Most likely grayed out)

Most people will not see this field. If using the method of deducting crews not based on capacity but based on a manually entered number, which is not recommended, enter the default number here. It is usually "1."

Warning Messages

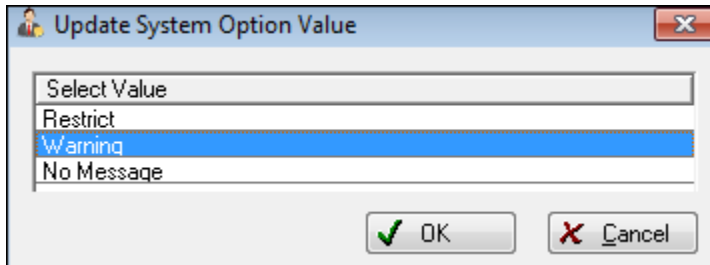
>Utilities>System Options>Schedule Pro >Scheduling>Warning Messages

Type	Module	Applies To	Category	Option	Value	Note
 Global	Schedule Pro	Scheduling	Warning Messages	Crew Does Not Install Job Type	Warning	
 Global	Schedule Pro	Scheduling	Warning Messages	Crew Does Not Work on Scheduled Day	Warning	
 Global	Schedule Pro	Scheduling	Warning Messages	Crew Overbooked for Day	Warning	
 Global	Schedule Pro	Scheduling	Warning Messages	Crew Required	No Message	
 Global	Schedule Pro	Scheduling	Warning Messages	Crew Time Conflict	No Message	
 Global	Schedule Pro	Scheduling	Warning Messages	Exceed Maximum Jobs per Day per Crew	No Message	
 Global	Schedule Pro	Scheduling	Warning Messages	Installation Depot Overbooked for Day	Restrict	
 Global	Schedule Pro	Scheduling	Warning Messages	Job must be Scheduled to the Primary or Secondary Depot for	No Message	
 Global	Schedule Pro	Scheduling	Warning Messages	Reason For Editing Required	Restrict	
 Global	Schedule Pro	Scheduling	Warning Messages	RFMS Material Order Lines - Check for Status GEN PQ, NONE	Restrict	
 Global	Schedule Pro	Scheduling	Warning Messages	Sales Representative Required	No Message	
 Global	Schedule Pro	Scheduling	Warning Messages	Scheduled Job is in the Past	No Message	
 Global	Schedule Pro	Scheduling	Warning Messages	Tracking Table 1 Required	Restrict	
 Global	Schedule Pro	Scheduling	Warning Messages	Tracking Table 2 Required	No Message	

Type Must be Global

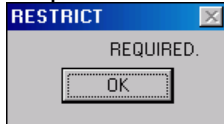
The message notification Value allows setting the level of alert for various scenarios. The restriction or warning will come up when the job is first scheduled as well as every time it is edited as long as the restriction applies.

Choose From:



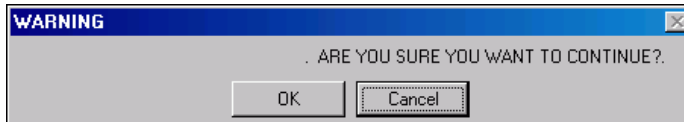
Restrict

Stops the user from going forward until the appropriate action is taken.



Warning

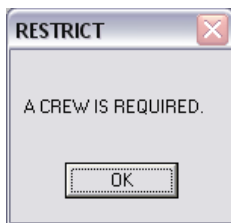
Displays a warning and gives option to proceed (OK) or Cancel to go back and enter the information.



No Message

Action is completed with no message displayed.

For example, to never allow any job to be scheduled without a Crew name being attached to the job, set that line to Restrict, and, if someone tries to add a job to the schedule without a Crew, they will encounter the following message and have to go back and add the Crew to the job before adding it.



The Warning setting will show a message if the person tries to schedule without a Crew, in this example, but would let the scheduler override the warning and schedule the job without the Crew even after being warned. The **none** setting ignores this particular factor altogether and allows the job to be scheduled with no restriction or warning. This works well for anything that is often allowed so the users don't get in the habit of ignoring the warnings.



Notes:

There is an exception to this, which is that there is a setting in the System Options screen that allows setting a manager or special user or group of users to see a **“Restrict”** message as a warning. To use this, set the “locked down” item, such as “Crew Overbooking” to “Restrict” on this screen, then for the person who can override set the Utilities>System

Options>Schedule Pro>General>Display System Settings Restrict Message as a Warning Message to yes. (Of course, to enforce the integrity of this, password protect system options.)

Most users leave these Warning Messages on “Warning” to get started.

FIELDS: Warning Choices	Description
Crew Does Not Install Job Type	This warns if a crew does not install the job type they are assigned.
Crew Does Not Work On Scheduled Day:	This warns when a job is assigned to a Crew on a day he never works, or on a day he is scheduled to “have the day off.”
Crew Overbooked for Day:	This warning appears when trying to assign more quantity to a crew in a day than they have in their Crew Capacities.
Crew Required:	This warns when a scheduler attempts to add a job without a crew. For some companies, this is how they normally schedule. In that case, this can be set to “No Message.”
Crew Time Conflict:	ALL jobs are scheduled for ALL DAY and then let the providers’ decide which jobs to do first, second, etc. turn this warning off by setting it to “None,” but otherwise, it will warn when a crew is scheduled for overlapping time slots in a day.
Exceed Maximum Jobs per Day per Crew:	As an example, if the Max Jobs per Day per Crew is set to “3”, this Restriction or Warning will come up when a scheduler attempts to schedule the fourth job for that day. NOTE: This relates back to the number entered in that field, not the individual Crew settings. See System Settings>Capacity Settings > Maximum Jobs per Day Per Crew System Settings.
Installation Depot Overbooked for Day:	This warning appears when trying to schedule a job that exceeds the depot’s capacities for that job type or types for that day.
Jobs must be Scheduled to the Primary or Secondary Depot for the Order Store Code:	If this is set to Restrict, users will not be allowed to assign a job to a crew from a depot that is not related to the store code of the job. If it is set to restrict, crews from other depots will not be available for scheduling. If it is set to warning, on the Select Crew screen, they will have the option to check a box allowing them to see crews from “All Depots” regardless of which Store Code they are associated with, and a warning will be generated if they choose one of these crews. Set to none, they can check the same box, and no warning will be generated.
Reason for Editing Required	By default, this is set to “Restrict,” which requires the user to note a “Reason for Edit” each time they change an existing scheduled job. This can be set to “Warning” or “None” instead.
RFMS Material Order Lines – Check for Status Gen PO, On Order, or Material is not Available:	This warning tells whether there are material lines that haven’t been ordered or received. If jobs are not allowed to be scheduled even when some of the order lines are not showing as available, run a report to show what lines are scheduled that have a problem line status. This switch is applicable only if scheduling material lines vs service lines.
Sales Representative Required:	This warning is to make sure a Salesperson is entered in to a job.
Scheduled Job is in the Past:	To be able to change the schedule for jobs that have already gone to reflect what actually happened; this warning should be turned to “None.”

Tracking Table 1 Required	Allows the user to have the ability to restrict, warn or set no message if a tracking table is not selected.
Tracking Table 2 Required	Allows the user to have the ability to restrict, warn or set no message if a tracking table is not selected.

Scheduling Grid

>Utilities>System Options>Schedule Pro>Scheduling Grid

Type	Module	Applies To	Category	Option	Value
User	Schedule Pro	Scheduling Grid	Configuration	Primary Daily Grid Job Type	User Specific Values
User	Schedule Pro	Scheduling Grid	Default Filters	Deduct Capacity Lines Only	User Specific Values
User	Schedule Pro	Scheduling Grid	Default Filters	Scheduling Grid Job Status	User Specific Values
User	Schedule Pro	Scheduling Grid	Default Filters	Scheduling Grid Line 1	User Specific Values
User	Schedule Pro	Scheduling Grid	Default Filters	Scheduling Grid Line 2	User Specific Values
User	Schedule Pro	Scheduling Grid	Default Filters	Scheduling Grid Line 3	User Specific Values
User	Schedule Pro	Scheduling Grid	Default Filters	Scheduling Grid Line 4	User Specific Values
User	Schedule Pro	Scheduling Grid	Default Filters	Scheduling Grid Line 5	User Specific Values
User	Schedule Pro	Scheduling Grid	Default Filters	Show Jobs / Show Crews	User Specific Values
User	Schedule Pro	Scheduling Grid	Display	Display Crew Availability Dots on Select Crew Screen and Grids	User Specific Values
User	Schedule Pro	Scheduling Grid	Display	Display Material Status Delta on Grids	User Specific Values
User	Schedule Pro	Scheduling Grid	Interface	Refresh grid when it gains focus	User Specific Values
User	Schedule Pro	Scheduling Grid	Interface	Select Grid to Display	User Specific Values

Primary Daily Grid Job Type

Type- Can be Global, Assigned or User

If a single job type will always be viewed on the daily grid, select that job type as the Primary Daily Grid Job Type.

Doing so will enable a short cut button on the screen with that job type as the name. Clicking the button will deselect all other job types, leaving the primary job type as the only one to be displayed. Use the check boxes on the grid to select and unselect job types. Use tagall to select all job types.

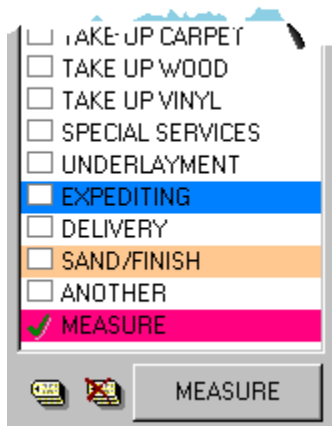


Figure: Daily Grid Job Type Options

Deduct Capacity Lines Only

If this checkbox is set to "Yes," only jobs with Deduct Capacity lines scheduled for a given day will show on the grid on that day. So, a scheduled job that does not have a deduct capacity line, for example, a job that has one "Miscellaneous" line only, will not appear on the grid. The recommended setting for this checkbox is to leave it unchecked.

Scheduling Grid Job Status

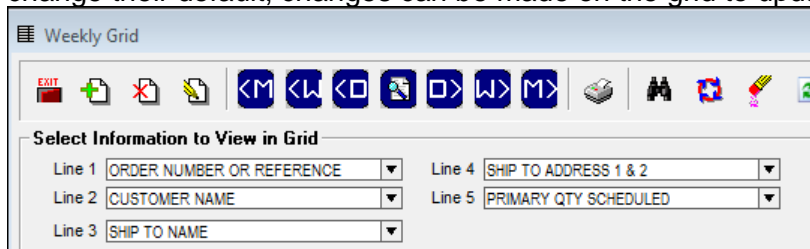
This applies a filter based on Job Status to the Scheduling Grid. The recommended choice in this field is "All" so that no jobs will be hidden. However, if a person who is just dealing with follow up calls, for example, after a job is done, might want to default to "Completed" status to filter out jobs that have been marked completed.

Scheduling Grid Line Defaults (1-5)

This option allows the ability to select the information to display as a company-wide default on the Scheduling Grid screen. Click the down arrow next to each field to choose the appropriate information.

During setup, it is a good idea to select something for the Schedule Grid Lines 1-5 default values. These values can always be changed later and the view may be edited while in the Weekly grid, however remember that these default value fields determine how the jobs are displayed when opening the scheduling grid screen. If nothing is entered in these values and they are set to type Global or Assigned, the lines will have to be manually changed from order number/reference number each time.

If these options are set to the type User, the user will not have to go to system options to change their default, changes can be made on the grid to update the default setting.



Options

ORDER NUMBER OR REFERENCE PROMPT
REFERENCE PROMPT
UD JOB #
CUSTOMER NAME
CUSTOMER ADDRESS
CUSTOMER CITY STATE ZIP
UD TELE #1
SHIP TO NAME
SHIP TO ADDRESS 1 & 2
SHIP TO CITY STATE ZIP
UD TELE #2
PRIMARY CREW NAME
PRIMARY QTY SCHEDULED
JOB TIME SLOT
JOB STATUS
JOB DAY
SHIP TO ADDRESS 1
SHIP TO ADDRESS 2
SALESPERSON
JOB TIME SLOT START/END TIMES
FIRST JOB LINE START/END TIMES

Field Definitions

Reference: the information in this field is determined by field mapping. See Field Mapping for details.

User Defined Job Number: from the customer order

Job Time Slot vs Job Time Slot Start End Times: Job time slot lists the name of the slot along with the times.

MIXED 8:00 AM to 5:00 PM
8:00 AM to 5:00 PM

Job Day: example Day 2 of 4

▲ CG302605 NO PRIMARY QTY DAY 1 OF 4 MIXED 8:00 AM to 5:00 PM 8:00 AM to 5:00 PM	▲ CG302605 NO PRIMARY QTY DAY 2 OF 4 MIXED 8:00 AM to 5:00 PM 8:00 AM to 5:00 PM	▲ CG302605 NO PRIMARY QTY DAY 3 OF 4 MIXED 8:00 AM to 5:00 PM 8:00 AM to 5:00 PM	● ▲ CG302605 NO PRIMARY QTY DAY 4 OF 4 MIXED 8:00 AM to 5:00 PM 8:00 AM to 5:00 PM
--	--	--	--

Show Jobs / Show Crews

This sets the default setting for this filter on the Weekly Scheduling Grid. The most common setting would be to leave it on "All Jobs / All Crews," which defaults to showing every provider and every job. To see only the jobs that are scheduled, hiding every provider that is not working that week, choose "All Jobs / Scheduled Crews only."

The best way to decide which filter to use is to go to the grid and pull up a week where many jobs are scheduled, test the various filters, and decide which one would be most handy. Regardless of the default set in this field, the filter can be changed for viewing and printing on the fly in the grid.

Display Crew Availability Dots on Select Crew Screen

Setting this to yes will turn on the color coded dots that display whether the crew is already booked or fully booked for the day in question. A black dot will still be displayed for days crews are off or unavailable. This option has been added for those users who are looking for an increase in speed.

Display Material Status Delta on Grids:

Setting this to yes will display the material status indicators on the **detailed** grid. This refers to: material status triangle color coded icons () ▲

Refresh Grid when it gains focus:

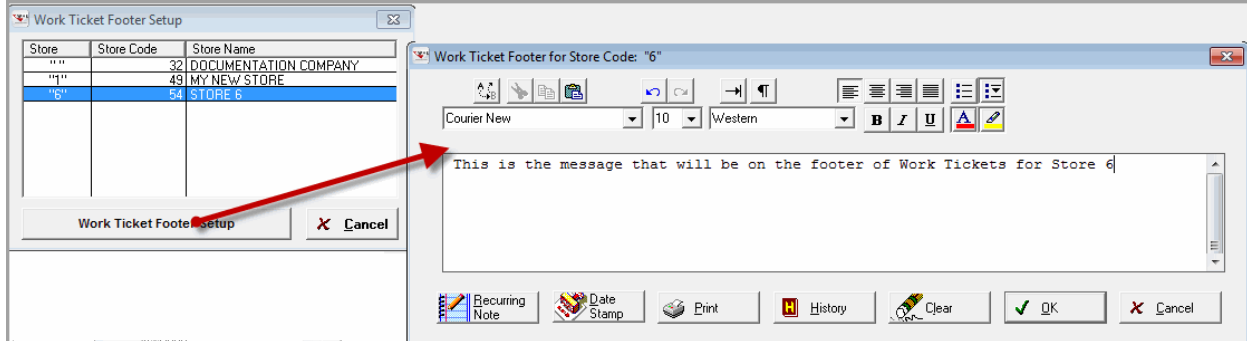
In version 11.1, a change was made so that each time the Grid Screen was clicked on after leaving it open and therefore it gained the focus in windows, it automatically refreshed. This refresh updated any changes in information made to the grid by any workstation, but it also took the user to the top of the file. Some clients only want to refresh using the refresh button. Set this to yes to automatically refresh.

Select Grid to Display:

Choose one of the options.

Work Ticket Footer

This button opens a screen to enter a message that will print at the bottom of the Work Ticket that can be printed from Schedule Pro. This is Store Code specific. For a store code for commercial jobs and a store code for residential jobs, it is possible to have separate footers on the work tickets for each of those store codes.



Notes:

This work ticket can be used in place of the Order Entry work order. The labor dollar amounts cannot be encrypted on the work ticket, but are optional for printing.

Setup Menu

Schedule Pro>Utilities>Set Up

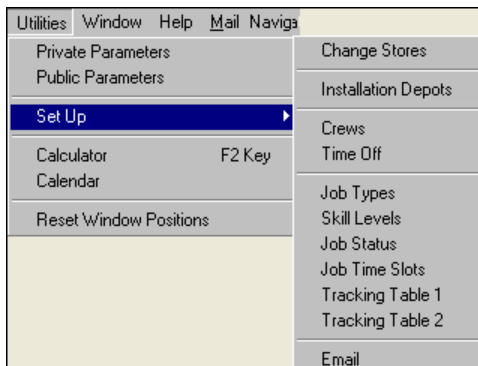
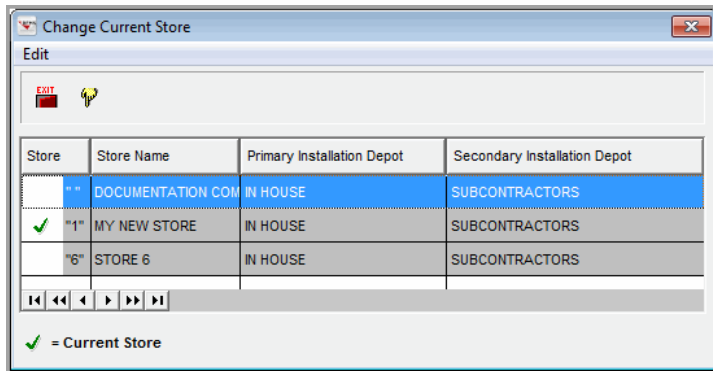


Figure: Set Up Menu

Change Stores

Schedule Pro>Utilities>Set Up>Change Stores

This screen allows selecting a current store code for scheduling. For most users, this will never need to be adjusted manually. The store code will always be the code of the last job scheduled unless manually changed.



The “current” store code selection is user specific. One user can be set to schedule for store A and another schedule for store B (see System Options). The GREEN checkmark shows the store that is currently selected for this user. The current store is always in view on the Status Bar at the bottom of the Schedule Pro screen.



Installation Depots

Schedule Pro>Utilities>Set Up>Installation Depots

This screen allows adding and editing Installation Depots. An Installation Depot is a way to group crews, usually defined by a location that is their home base. An Installation Depot could also be a second string of subcontractors that are only used when necessary. Whatever the configuration, each warehouse location should be entered into Schedule Pro as an Installation Depot, if it has its own unique group of crews. A crew can belong to **only one depot** in the system.

Each **RFMS Store Code must have at least one depot** assigned to it. Each Store Code can only be related to one Primary and one Secondary (backup) depot, so it is best to keep the number of depots to a minimum where possible. One depot can be assigned to multiple store codes, if appropriate. So, the “best practice” here is to have one or two depots at most per Store Code. It is not necessary to set up multiple depots if there are not multiple groups of crews. There is a way to assign crews to jobs from store codes unrelated to their depot, but it is considered a “work around.”

The lower portion of the Installation Depots setup screen displays the automatically calculated capacities or allows for viewing and editing the manually entered capacities for each job type the depot can install for each day of the week. A note on the tab will indicate which calculation option is being used. The ability to enter values on this screen is only available the Manually Entered Depot Capacities option on the System Settings Capacities is selected (see [System Settings–Capacities](#)).

To enter a depot click on "Installation Depots" from the Main Screen, then hit the Insert button (the Green Plus), and type in the name of the depot. If only using one group of crews, just name the depot the store name, and then tab over and type in the location. Otherwise use name and location to specify how crews are divided.

Once the depot has been entered, hit "Associate Store Codes" at the top of the screen to pull up a list of RFMS Store Codes. For any store codes to schedule, highlight the record, and hit the Edit button, then choose the appropriate Depot from the list created in the Primary Installation Depot column. To associate a Secondary Depot, which is optional, choose a different depot in that column.

For example, with two locations that are about 45 minutes drive time apart. Set up a depot labeled "A Installers" and a depot named "B Installers", then set up your A store with a Primary Depot of "Anaheim Installers" and use the B crews as a backup for that store, entering "B Installers" as a Secondary Depot.

For two locations that are too far apart to use each other's depots as a backup, just set them up with one depot each, i.e. A store has "A Installers" as a Primary and b store has "b Installers."

If you just have one store code with one group of installers, Quality Carpets can just have "Quality Installers" as Primary.

If you have one location, you can set up "In-House Installers" as primary and "Subcontractor Installers" as secondary for all of your store codes, and so on.

Installation Depot Daily Limit Capacities		Installation Depot Active Crews							
NOTE: INSTALLATION DEPOT CAPACITIES NEED TO BE MANUALLY ENTERED AS THE DAILY NUMBER OF CREWS									
Job Type	Units	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
ALL	SF	0.00	5,700.00	5,700.00	5,700.00	5,700.00	5,200.00	0.00	
CARPET	SF	0.00	400.00	400.00	400.00	400.00	400.00	0.00	
CERAMIC	SF	0.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	0.00	
HARDWOOD	SF	0.00	1,700.00	1,700.00	1,700.00	1,700.00	1,700.00	0.00	
MARBLE	SF	0.00	1,200.00	1,200.00	1,200.00	1,200.00	500.00	0.00	
PAD	SF	0.00	400.00	400.00	400.00	400.00	400.00	0.00	

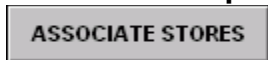
If the manual method is selected in System Settings, then the capacities of each Installation depot must be entered for each product and day of the week that applies. For example, only ceramic tile technicians are dispatched from Installation Depot One. If so, only enter capacity amounts on the line(s) that reference ceramic. The others would be left at zero.

The **Installation Depot Active Crews** tab is a view-only information tab in which all of the crews are listed for the highlighted installation depot along with the highlighted crew's available work days and capacities.

Installation Depot Daily Limit Capacities		Installation Depot Active Crews							
Crew Name	Crew Description	Sun	Mon	Tues	Wed	Thurs	Fri	Sat	
CREW 1		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CREW 2		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CREW 3		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CREW 4		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
CREW 5		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Job Type	Daily Qty Limit	Units
CARPET	500.00	SF
CERAMIC	0.00	SF
HARDWOOD	0.00	SF
MARBLE	0.00	SF
PAD	0.00	SF

Installation Depots - Associate Stores



This button allows linking or associating each store with a primary and secondary Installation Depot. This allows control of which depots and, thus, crews can be used for scheduling out of each store location. An installation depot must be associated to a store code in order to

schedule jobs for the installation depots associated crews. A depot can be linked to more than one store.



Notes:

Each store code entered in RFMS displays on this screen automatically. If a store code needs to be added, that must be done in RFMS.

Store Code	Store Name	Primary Installation Depot	Secondary Installation Depot
" "	WHEAT'S CARPET ONE-FLOOR#	IN HOUSE	SUBCONTRACTORS
"1"	TEBNER	IN HOUSE	SUBCONTRACTORS
✓ "2"	DEMO STORE	Depot IN HOUSE SUBCONTRACTORS	SUBCONTRACTORS

1. Click the **Associate Stores** button. The **Relate Installation Depots to Stores** screen appears.
2. Double-click in the Primary Installation Depot column on the line for the store code to which the depot will be associated.
3. Click the down arrow. A pick list appears that contains all the depot records already added. If an Installation depot is not in the list, exit this screen and add the depot before continuing. Select an Installation Depot name from the list.
4. If there is a second depot that needs to be associated, do the same in the Secondary Installation Depot column. Otherwise, leave the Secondary Installation Depot column blank.
5. Click **Exit** to save the changes.
6. Continue for each store code. Remember, all store codes must have a depot associated to it before a job can be scheduled for that store code.
7. If this store code is normally used at this workstation, click the **Set as Current Store** button. A Green checkmark indicates the default store.

Crews

Schedule Pro > Utilities > Set Up > Crews

View, add, edit or delete crews from this screen.

Crews should be added after Depots and Job Types have been set up.

Crew Name	Crew Nickname	Crew Description	RFMS Supplier/ Provider Name	RFMS Supplier/ Installer Status	Installation Depot
AARON, CEDRIC			AARON, CEDRIC	PROVIDER - ACTIVE	IN HOUSE
ALLEN, JASON	JASON	GENERAL			IN HOUSE
BOOTH, JAMES	JAMES-STEVE	GENERAL	BOOTH, JAMES	PROVIDER - ACTIVE	IN HOUSE
COLLAZO, JESUS	JESUS C.-JUAN JR.	CERAMIC TILE	JESUS COLLAZO-ALVARADO	PROVIDER - ACTIVE	IN HOUSE
DERRELL, SOUTH			DERRELL A. SCOTT	PROVIDER - ACTIVE	IN HOUSE
EVANS, TONY	TONY-JUSTIN	GENERAL	EVANS, TONY	PROVIDER - ACTIVE	IN HOUSE
NEW CREW			A-1 SHARPENING	SUPPLIER	SUBCONTRACTORS
PARKER, ZACH	ZACH PARKER	SUBCONTRACTOR			SUBCONTRACTORS
PORTER, CHRIS	CHRIS-TONY	CERAMIC TILE			IN HOUSE
RUSHING, LYLE	LYLE	SAND & FINISH	PORTER, STEVEN C.	PROVIDER - ACTIVE	IN HOUSE
SANDOVAL, EDUARDO	EDUARDO-ALEX	GENERAL			SUBCONTRACTORS
SLEDGE, GLENN	GLENN-DERRELL	GENERAL	SLEDGE, GLENN L.	PROVIDER - ACTIVE	IN HOUSE
WILLIAMS, DAVID	WILLIAMS, D	GENERAL	DAVID WILLIAMS	PROVIDER - ACTIVE	IN HOUSE
WILLIAMS, DEWAYNE	DEWAYNE	GENERAL	DEWAYNE WILLIAMS	PROVIDER - ACTIVE	SUBCONTRACTORS

Job Type	Units	Daily Qty Limit	Max Jobs Per Day	Skill Level
CARPET	SF	0.00	0.0	
CERAMIC	SF	0.00	0.0	
DELIVERY	EA	0.00	0.0	
EXPEDITING	EA	0.00	0.0	
UNDERLAYMENT	SF	0.00	0.0	
VCT	SF	0.00	0.0	

Viewing Crews

Update Status for All Crews based on Worker Information File

If crews were initially entered by pulling the crew in from the Worker Information File (which is recommended – see Crew Information) and the information, like name or address, or phone number(s) changes, click the **Update Status for All Crews based on Worker Information File** button to refresh Crew information in the Schedule Pro. This will NOT change the “Crew Name” field, but will update “RFMS Supplier / Provider” as well as contact information.

Filters

These filters can help narrow the view to find certain types of crews. They can be used in tandem. For example, narrow down to just view “Active” crews (Status) in one depot (Depot) who install “Carpet” (Job Type).

Filter by Crew Status

This will default to “Active” so that any old, “Inactive” crews will be filtered out of this view when the screen is first opened. To view Inactive crews only, select “Inactive.” To view ALL crews, regardless of status, select “ALL”.

Filter by Installation Depot

For most users, this will default to “ALL,” and it will not filter the list. If the system option is set to filter to a specific depot, it will filter to show only crews in that depot. The **F8** button can also be clicked to view a list of depots, and select one to use as a filter, so the list can be narrowed down to one depot.

Filter by Job Type

For most users, this will default to “ALL,” and it will not filter the list. If the system option is set to filter to a specific job type, it will filter to that job type. The **F8** button can also be clicked to view

a list of Job Types, and select one to use as a filter. If a job type is selected, the list will only display the crews who have capacities for that job type.

Crew Name

To search for a certain crew name, type the first few letters of the crew's last name in the white **search crew name** field and click "Tab."

Add/Edit Crews

To add a new crew, click the **insert** button and follow the instructions on the **Crew Information** screen. To edit an existing crew, highlight the crew name and click the **edit** button to open the **Crew Information** screen (or double click the crew that to edit).

General Information – Crews

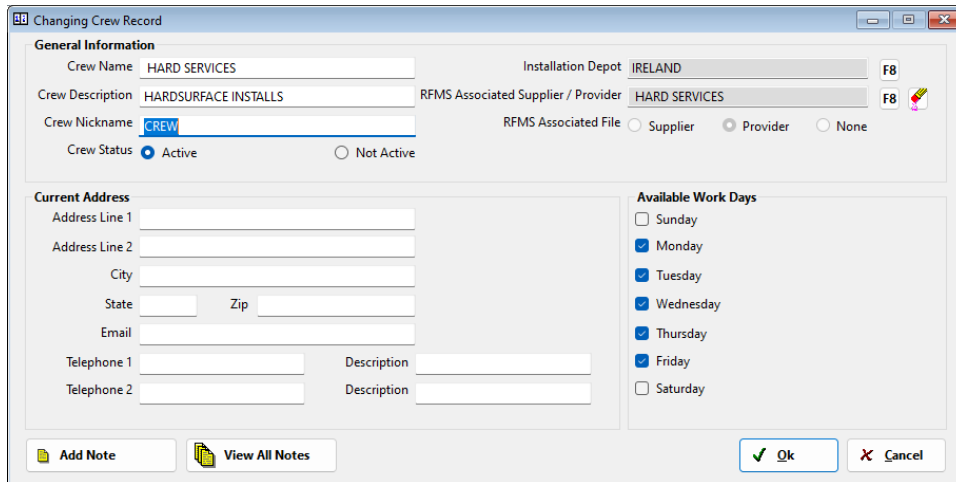


Figure Crew Set Up screen

RFMS Associated Supplier/Provider

Though this is not the first field on the screen, it is the first that should be entered. Click the **F8** button, and then choose either "Supplier" to pull from the RFMS Supplier file or, more commonly, "Provider" to pull from the RFMS Human Resources Worker Information File.



To use the Create Provider Records feature of Schedule Pro now or sometime in the future, it is best to add crews by first pulling the record in from the Worker Information or the Supplier File. This will tie the crew to the record used to pay them. Provider records cannot be successfully created for crews that are entered without importing. To enter a crew manually, just fill in Crew Name, Depot, and any other desired information



Notes:

The **Provider** box must be checked in the Provider record in the Worker Information File for the Providers to show up in the list. (**Active** and **Scheduler** boxes must also be checked.)

Double-click the desired Supplier/Provider to select, and it will fill in many of the Crew fields.

Crew Name

This field will auto-populate from the RFMS Associated Supplier/Provider selection, but can be edited afterward. For example, a provider named Theodore, is known as Ted, change the Crew Name to Ted, and this will appear throughout the schedule, while the provider records will still get created using “Theodore.”

Crew Description & Crew Nickname

These fields are optional and will not appear on any reports or many screens. Use these to note any nicknames or the primary type of material this crew installs.

Installation Depot

Click the **F8** button to choose an installation depot from the list. A provider can only be assigned to one depot.

Crew Status

Click inactive for a crew who cannot be deleted because jobs have been assigned to them but should not show on the selection list.

Web Orders

Current Address

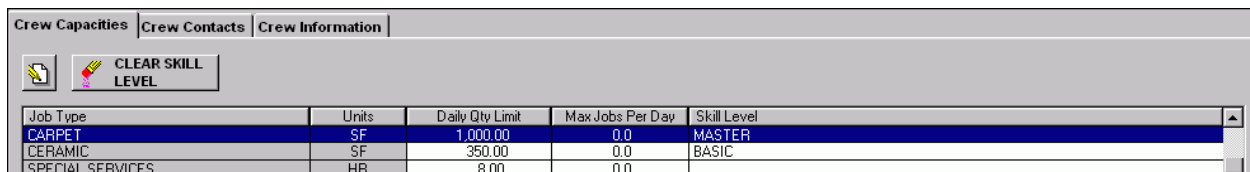
This field will auto-populate from the RFMS Associated Supplier/Provider selection, but can be edited afterward.

AVAILABLE WORK DAYS

Check each day of the week the crew is available to perform installations. The Available Work Days information is taken into consideration during the actual scheduling procedure and determines if a crew is available for a specified day or not. It also determines whether that crew’s capacities are counted in the depot capacities for that day.

Crew Capacities Tab

To edit a crew’s capacities, highlight a crew in the top half of the Crew Setup screen, and then edit the corresponding “Daily Qty Limit” for the job type(s) to add or change for that crew. In this example below, the crew can do either 1,000 SF of Carpet OR 350 SF of Ceramic or 8 HRS of Special Services, or he could do a combination of those things, and his capacities would be reduced by the percentage of the Daily Quantity Limit used by each job scheduled.



Job Type	Units	Daily Qty Limit	Max Jobs Per Day	Skill Level
CARPET	SF	1,000.00	0.0	MASTER
CERAMIC	SF	350.00	0.0	BASIC
SPECIAL SERVICES	HR	8.00	0.0	

This daily quantity limit, first says that this crew does this type of work at all. If the limit is “0” for carpet, for example, the provider will not be offered as a carpet crew on the “Select Crew” screen. It also assigns that crew’s daily capacity for that job type as well as adds that amount to that provider’s depot’s daily quantity limit for the job type.

Optionally a “Max Jobs per Day” for each job type can be added, though any messages relating to the Max Jobs per Day are generated from the system-wide generic Max Jobs field located in *X>Utilities>System Options>Schedule Pro>Capacity Settings>Maximum Jobs per Day per Crew*

Last, and optional, is the **Skill Level** field. Assign a “Skill Level” for each crew for every job type that crew installs. This field is a drop-down list that pulls from the Skill Levels list defined in Setup-Skill Levels. These will show when selecting a Crew from a pop-up screen. For example, if someone is a Master carpet installer, but a Novice at vinyl, note that and anyone scheduling them will know to try to use them on carpet, but use them as a backup vinyl installer.

Crew Contacts Tab

In the Crew Setup screen, enter additional contact information. It is not required, but could assist later if contacting the Installation Company or individual with questions about scheduling a job.

Single-click a crew name to select. Then, click the Crew Contact tab. Click the **insert** button to add a Contact. Fill in First Name, Last Name, Title, and Phone Numbers. Tab between fields to enter or edit information.

First Name	Last Name	Title	Telephone	Mobile Phone
JOHN	WILSON	OWNER	225-212-2121	925-512-0000

As many contact names as needed for each crew may be entered. For example, the crew may be an outside company each person who would perform installations under that company could be entered.



Notes:

If multiple contact names are entered, highlight one contact and click the **Main Contact** button to select the name of the individual who is the main contact person. A list of Crews and their contacts can be printed from the Report Menu.

Crew Information Tab

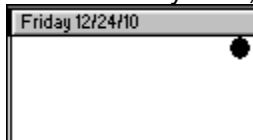
This is a convenient way to view information from the **crew general information** screen, and cannot be edited here.

Time Off

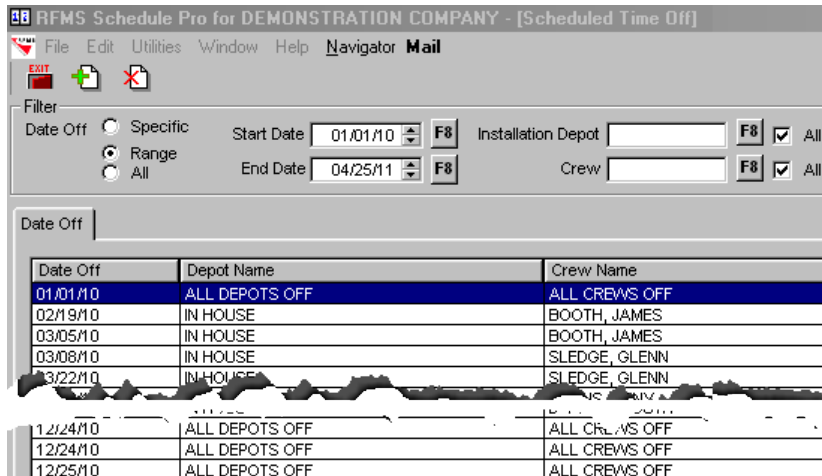
Schedule Pro>Utilities>Set Up>Time Off

The days off scheduled for each crew can be added, deleted and viewed from here.

In the Weekly Grid, a day off will be noted with a black dot



In the Select Crew screen, a day off is noted with a black dot next to their name:



Scheduling Time Off for an Individual Crew

To enter a new Scheduled Time Off date, click “Add to Schedule”. Then, on the pop-up screen, select an Installation Depot from the **F8** pop-up list. Then, select a Crew from the second **F8** pop-up list. Add a Start Date and an End Date, and then click “Add to Schedule” in the top-right corner of the pop-up screen. This will add the day(s) off to the schedule.

A message will display indicated the day off was successfully added to the schedule. Enter an additional day off or click **exit** when finished.

Scheduling Time off for all Crews

To enter a new Scheduled Time Off date, click Add to Schedule. Then, on the pop-up screen, leave the All Depots & All Crews and All Crews checkboxes checked. Add a Start Date and an End Date, and then hit Add to Schedule in the top-right corner of the pop-up screen. This will add the holiday to the schedule.

Viewing Scheduled Time Off

This screen has a few filters, like many of the other screens in Schedule Pro. If a day off is missing, check the filters first. The Date range will default according to the system options setting. This will be filtered to “Specific”, which is one day, defaulting to today, “Range”, which is two weeks, defaulting to today and the next two weeks, or “All”, which does not filter by date. A single depot and/or crew can also be used as a filter.

Job Types

Schedule Pro>Utilities>Set Up>Job Types

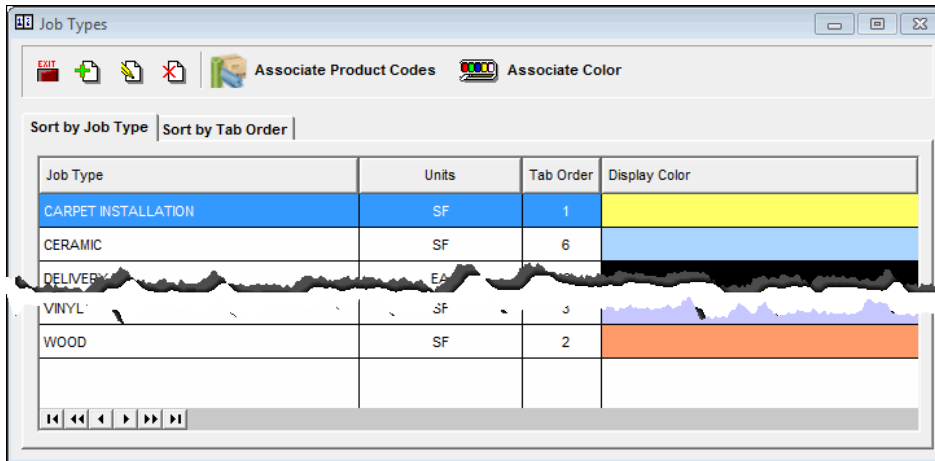
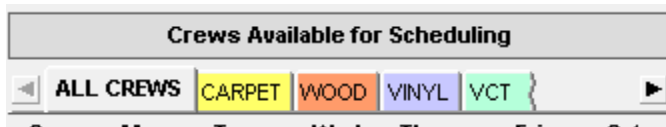


Figure Schedule Pro Job Types

While an order in RFMS may have several material lines, in schedule pro they all make up a single job. For Example, a carpet installation job may include the Carpet, Pad (Cushion), and Carpet Installation.

These Schedule Pro Job Types are also used for filtering and reporting. Each Job Type added will create a new Job Type Tab for tracking capacities on the calendar in the Schedule New Jobs screen.



For the example above, enter a job type of Carpet Installation and associate the RFMS product codes for Carpet, Pad (Cushion), and Carpet Labor as a group.

Job Type: Carpet Installation

Includes:

RFMS Product Code for Carpet: 01

RFMS Product Code for Pad (Cushion): 04

RFMS Product Code for Carpet Labor: 81 (deduct capacity product code)

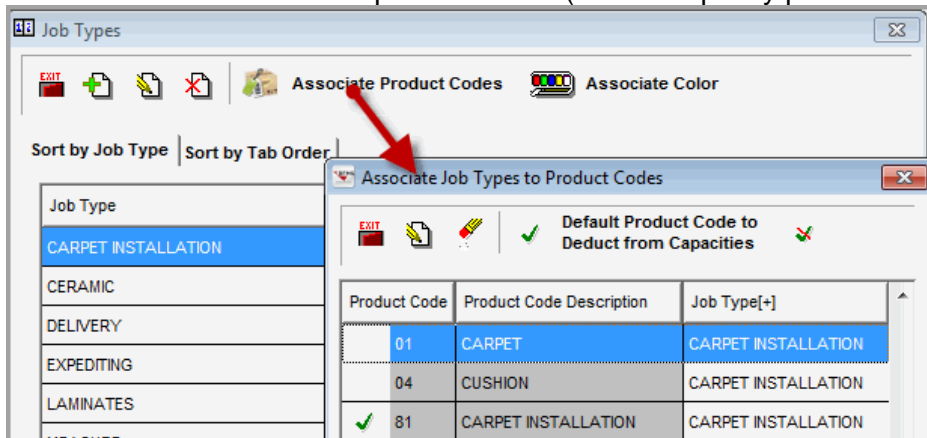


Figure Carpet Installation Job Type with Associated Product Codes

A type of unit must be assigned to each job type. Only lines with that unit type can function as "Deduct Capacity" lines. For example, if with "Hardwood" as the Job Type and the Units as "SF," any lines that fall into the Hardwood job type that are entered in LF, such as Stair Nosing

lines, will not deduct from the installer capacities even if they are marked as deduct with the green check mark. To have trim pieces deduct, they'll need to be in their own job type that's by the LF or PC.

To setup job types and associations, do the following:

Adding the Job Type

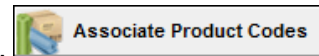


Click the **insert** button. The cursor will be positioned on a line at the bottom of the Job Type column. Type a name describing this product or group of products. For our example, type Carpet Installation.

Press the TAB key to move to the Units field. Type the appropriate unit of measure for this product. ***This should be the same unit of measure (i.e. EA, SF, LF, and SY) that used to enter most of the lines for this type of work in Order Entry.*** Because the setting for unit of measure can be different for individual users, this setting will override the user setting for scheduling making the unit of measure consistent in scheduling for all users so that capacity calculations can be done. The unit type should be two characters.

The new job type is added to the list with the next available TAB order assigned to it. See [setting the tab order](#).


Associating the Job Type to Products

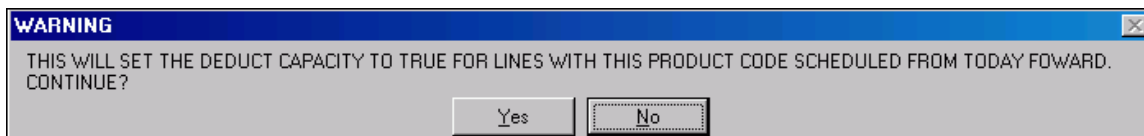


From the **Job Type** screen, click the **Associate Job Types** button. Double-click in the **Job Type** column for the desired product code. Using the down arrow select the job type from the list. These are the job types already entered on the previous screen. Select the job type that applies to this product code. Product codes which are not associated with a job type will not show on the list to be scheduled.

Designating the Deduct Capacity Product code

The last step is to designate which items in the group should be deducted from what a crew or depot can install in one day (capacities). Single-click the product code and then click the **Deduct from Capacities** button. A green checkmark will appear in the left column on the

Product Code Line.  **DEFAULT PRODUCT CODE TO DEDUCT FROM CAPACITIES**



This will only affect jobs scheduled from this point forward.

When scheduling, only the line item quantities whose product code has the Deduct from Capacities green check mark will be deducted from the crew and installation depot capacities.

Typically, the quantities would be deducted for the carpet material. In this situation the quantities for the Pad (Cushion) and labor should not be deducted also. There can be situations where it will be more effective to use the labor product codes for deducting from capacities.

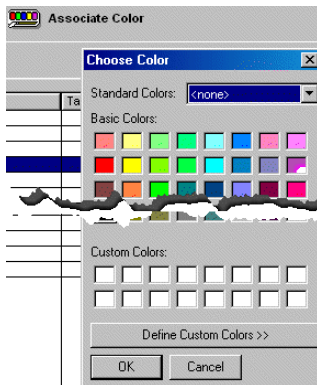


If a product no longer needs to be the deduct capacity product for this job type, click the button. This will only affect jobs scheduled from this point forward.

Associating a Color to a Job Type

Job types can also be color coded to make viewing easier on the weekly grid and schedule new jobs tabs. Darker colors are not recommended, as they will make the text difficult to view.

Highlight the job type, and then click the **associate color** button. When the **choose color** box appears; click the desired color or chose **define custom color**. When the color is chosen, click the **ok** button.



Tips for Using Job Types

- Carpet & Vinyl - When associating Product Codes Carpet (01) and Sheet Vinyl (02) a Job Type with either SF or SY Unit Types must be selected. If a SY Job Type is associated with the Carpet Product Code 01 then Schedule Pro will show RFMS Line Items for Carpet Product Code 01 in SY regardless of the user setting for other areas of RFMS. If a SF Job Type is associated with Carpet Product Code 01 then Schedule Pro will show RFMS Line Items for Carpet Product Code 01 in SF regardless of the user setting for other areas of RFMS. This is the same for the Sheet Vinyl Product Code 02.
- A built-in Job Type called **Miscellaneous** can be assigned to Product Codes for items such as Trim, Underlayment, etc. so they can be shown on a customer order without affecting the capacity settings. The Miscellaneous Job Type can be used for services that should not affect capacity settings and are not associated with a particular type of installation (removal, re-check, etc.)
- A built-in Job Type called **Unreferenced** can be assigned to a product code. This is the default setting if a product code is not assigned to a job type in Schedule Pro. Any line items containing an unreferenced product code cannot be scheduled and do not affect the capacity settings.

Setting the Tab Order

Each Job Type added will create a new Job Type Tab for tracking capacities on the calendar in the Schedule New Jobs screen. The tab order set here is used on the schedule new jobs screen.



The TAB order is also used when adding temporary lines during the scheduling of a job. The orders in which the job types appear in the drop-down list can simply the line entry process. To set the tab order in the Schedule New Jobs screen, click the **Sort By Tab Order** tab. Highlight a Job Type, then click the up or down arrow to move it forward or backward in tab order.

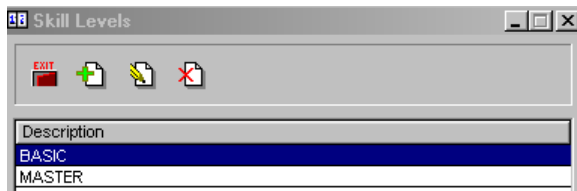
Skill Levels

Schedule Pro>Utilities>Set Up>Skill Levels

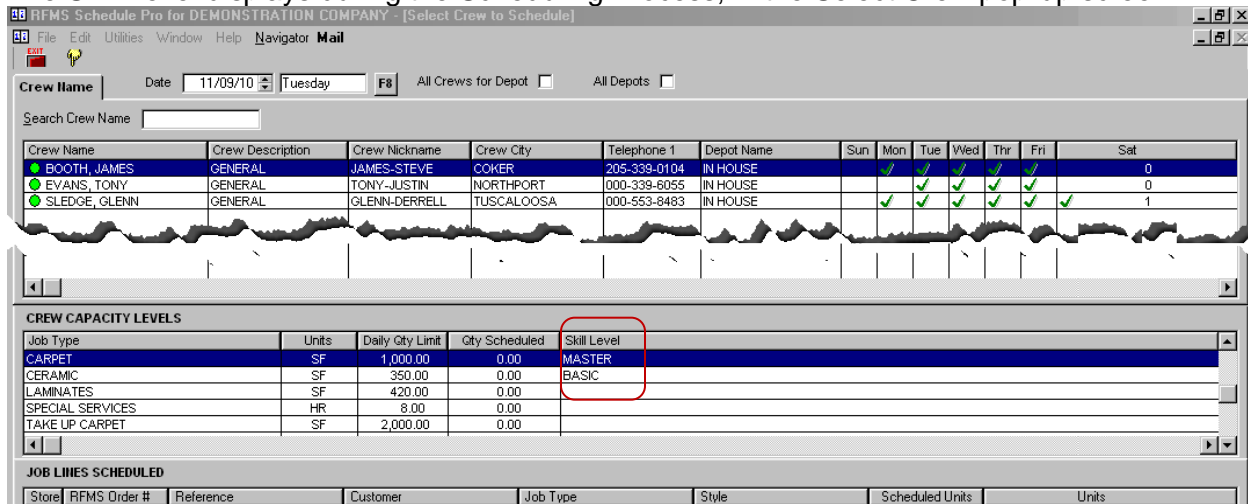
The Skill Levels area allows creation of a list of different skill levels for crews. This is optional. When a crew record is created, a skill level can be assigned to the crew that specifies the competency of installation ability (i.e. novice, master, etc.) for each job type that crew installs. For example, a crew can be a “Master” carpet provider, but a “Novice” vinyl provider. If this feature is used, create the list of skill levels on this screen, then go to Crews to use this list to modify Crews.

	Inserts a new Skill Level record.
	Changes the highlighted record.
	Deletes the highlighted record.

The Skill Level is assigned to the Crew in the Crew Information screen:



The Skill Level displays during the Scheduling Process, in the Select Crew pop-up screen:

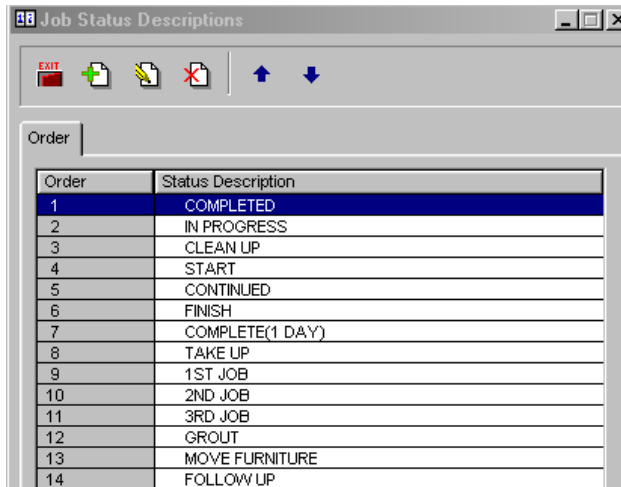


See Related: [Setting up Crews](#)

Job Status

Schedule Pro>Utilities>Set Up>Job Status

This screen allows setting up the Job Status list. Each job will have a job status, which helps to filter jobs.



- When Schedule Pro is first installed, there will be 10 default Job Statuses already in place. Any of them may be edited or deleted. To do so, highlight the proper Status and click the **Edit** (yellow pencil) button or **Delete** (red x) button.
- To add a status click the **insert** button, then type the status description in the blank field.
- The status order as appears when using **F8** to select the status on screens throughout Schedule Pro can be changed. Highlight a status then click the up or down arrow to move it up or down in order.
- Although an unlimited number of statuses are possible, it is recommended to keep this list as simple as possible to make the filtering useful.
- Once statuses are decided on, each user can have a default "Job Status" set in system options be assigned when they schedule a new job ("In Progress," for example) and another default status to filter on when loading the Create Provider Records screen ("Completed," for example).
- Once assigned to the scheduled jobs, these statuses will show in Order Entry, in the "Status" field for the soonest, or most recent jobs scheduled for that Order.

Job Time Slots

Schedule Pro>Utilities>Set Up>Job Time Slots

This screen allows creating a list of Job Time Slots to be used to quickly assign time frames to the jobs. On each job, a Start and End time can be manually edited, but most users prefer to use Time Slots for speed and consistency.

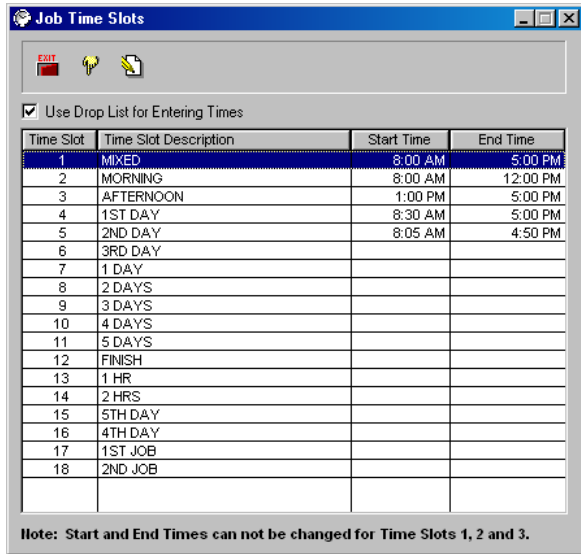
The first three time slots are hard-coded in the system. Their names however can be edited. They are "MIXED" which is an all day job (8:00 AM to 5:00 PM), "MORNING" which is from 8:00 AM to Noon, and "AFTERNOON," which is from 1:00 to 5:00 PM. To edit the name on these

three, simply highlight the line, click the **Edit** (yellow pencil) button and type the desired name. Duplicate time slot descriptions are not allowed.



Notes:

Based on System Settings (General Tab), jobs can default to a Morning or Afternoon time slot based on the Work Order Notes in order entry.



Time slot descriptions can be added or deleted from this screen. Fifteen user-defined fields are included. In the example above, Time Slot 4 has been “user defined” as an 1st Day.

To edit the fifteen user-defined time slots, highlight the line, click the **Edit** (yellow pencil) button and type the desired Time Slot Description, then click Tab and edit the start time, tab again to edit the end time.

In order to make scheduled times more flexible an option to not limit times entered to those on the time drop list has been included.

If the box is checked, picking from the 30 minute intervals in the drop list for Start and End times for each slot is required. If the box is not checked, any time can be typed in.

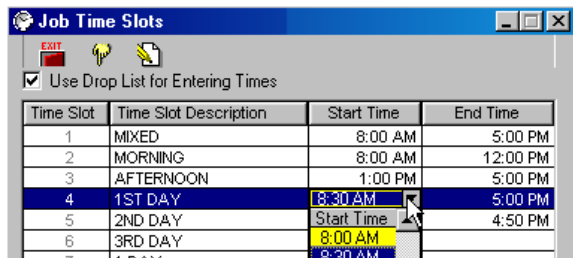


Figure: Edit using Drop List

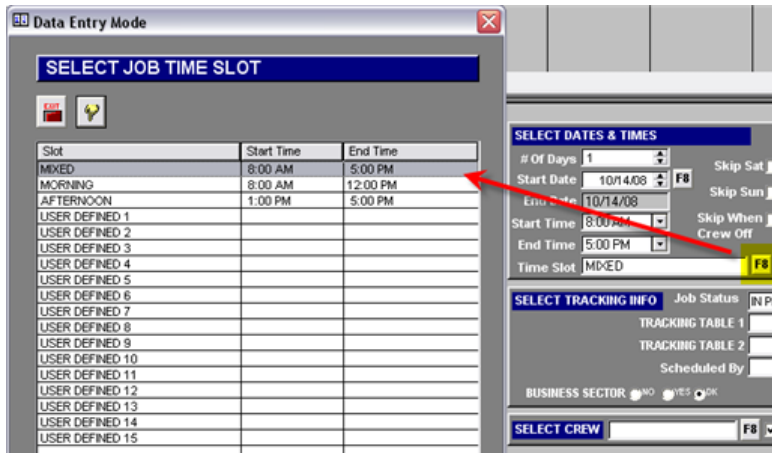


Figure: Using Time Slots

Tracking Tables

Schedule Pro>Utilities>Set Up>Tracking Table 1 or 2

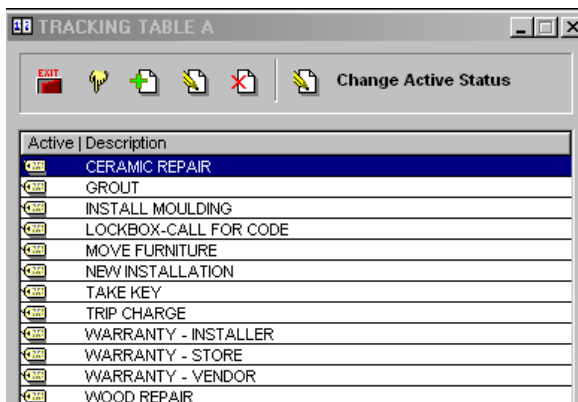
This screen allows creation of a list of descriptions that can be assigned to scheduled jobs and used to group jobs for tracking reports. Each job that is schedule can be assigned to one of these tracking descriptions on the Schedule New Jobs screen (or, later, in the Edit & Complete screen.)

The name of the **Tracking Table 1** or **Tracking Table 2** button can be changed from *>Utilities>System Options>Schedule Pro>General>Prompts* which will rename the “**Tracking Table 1 or 2**” button on the Setup screen. In this example, Tracking Table 2 was renamed to “Service Outcome”.

Adding/Editing a Tracking Record

Click the **Insert** button to add a new record. Type a description of the tracking category. Press Enter to save the record.

Click the **Edit** button to change the name of a tracking record



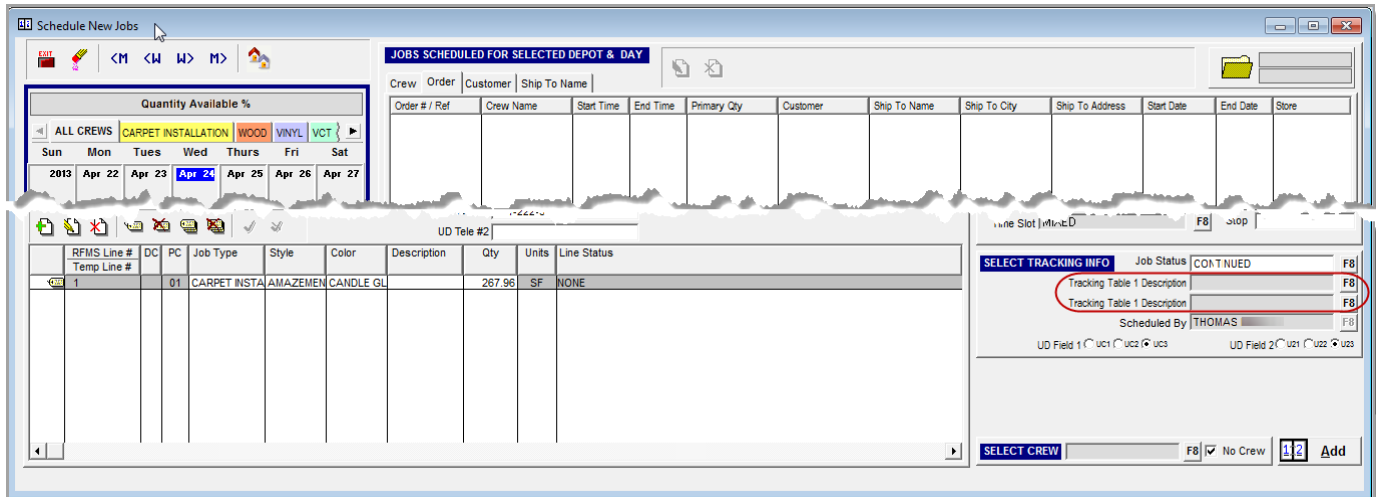
Click the **change active status** button to toggle a description between active and inactive. Active records are marked with a tag icon. Inactive records will not show in the drop down list when assigning tracking data to a job.

While a description which is assigned to a job cannot be deleted, it can be made inactive

Using the Tracking Category

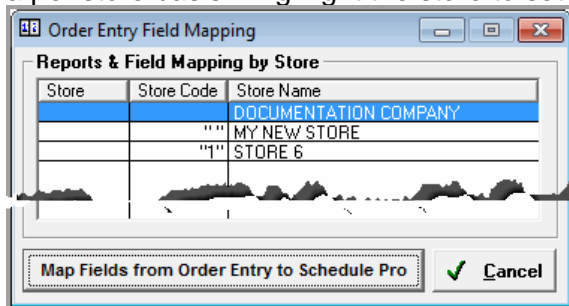
Click the **Schedule New Jobs** button.

In the lower right portion of the screen, press the **F8** next to one of the tracking fields. The tracking categories already entered appear. Click one of the categories to select it. By assigning this scheduled job to one of these categories, reports can be printed using the category as a sorting option.



Order Entry Field Mapping

For multiple stores, it is possible set the work ticket footer and field mapping from order entry on a per store basis. Highlight the store to set then click the **Map Fields** button



Map Fields from Order Entry to Schedule Pro

SCHEDULE PRO JOB FIELD	RFMS ORDER FIELD
Customer	SOLD TO LAST NAME, SOLD TO FIRST NAME
Reference	SOLD TO ADDRESS 1
Job Number	UD JOB #
Ship To Name	SHIP TO LAST NAME, SHIP TO FIRST NAME
Ship To Address 1	SHIP TO ADDRESS 1, SHIP TO ADDRESS 2
Ship To Address 2	SHIP TO ADDRESS 2
Ship To City	SHIP TO CITY
Ship To State	SHIP TO STATE
Ship To Zip	SHIP TO ZIP
Telephone 1	TELEPHONE 1
Telephone 2	TELEPHONE 2

This is where editing the field mapping that is used when a job is pulled from Order Entry to Schedule Pro is done. These settings are store code specific. To **use this Set Up for all stores**, just click the button.

The defaults are listed below, and put the Sold-To Order Header information in the Customer field in Schedule Pro and the Ship-To Order Header Information in the Ship To information in Schedule Pro. Although this screen WAS created to edit mapping if needed, it is recommended to keep it as close to the default as will work, as the reports are built with this data setup in mind.

Customer: Default Setting = Sold to First Name, Sold to Last Name

Reference: Default Setting = BLANK OR PO Number (This refers to the Order Entry Header PO Number)

Job Number: Default Setting = RFMS User Defined Job Number, often known as the "Sidemark"

Ship to Name: Default Setting = Ship to First Name, Ship to Last Name

Ship to Address 1: Default Setting = Ship to Address 1, Ship to Address 2

Ship to Address 2: Default Setting = BLANK

Ship to City: Default Setting = Ship to City

Ship to State: Default Setting = Ship to State

Ship to Zip: Default Setting = Ship to Zip

Telephone 1: Default Setting = Telephone 1

Telephone 2: Default Setting = Telephone 2

Use this Setup for All Stores: Click the button to copy these settings to all stores in the system.

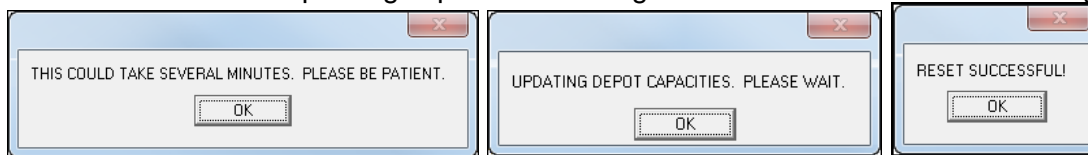
Maintenance

Schedule Pro>Utilities>Maintenance

Reset Depot and Crew Capacities

This menu item triggers a routine that refreshes job types, crews, and capacities throughout the program. So much of the program is built on data that is user defined that if a job type or crew or crew capacity is added or edited, it's a good idea to click this button to make sure those changes are reflected in the Schedule New Jobs screen and all throughout the program. This can take a few minutes, depending on the amount of data in Schedule Pro and on hardware speed.

There will be three confirmation messages, click ok on each of these. There could be several minutes between the updating capacities message and the reset successful message.



Purge Completed Jobs

This menu item allows for a periodic purge of jobs from Schedule Pro. Most users prefer to leave a backlog of jobs in the system for at least a year to have the ability to run long-term tracking and performance reports and to trace back through the service history of a job. However, after a few years, it is possible to purge some of the older jobs. Pick the most recent date to keep, and click the button to purge all jobs that were scheduled BEFORE that date.

This is the place to purge old jobs from schedule pro. If the System Settings screen has not been password protected, the **PURGE SCHEDULED JOBS** button probably should be protected.

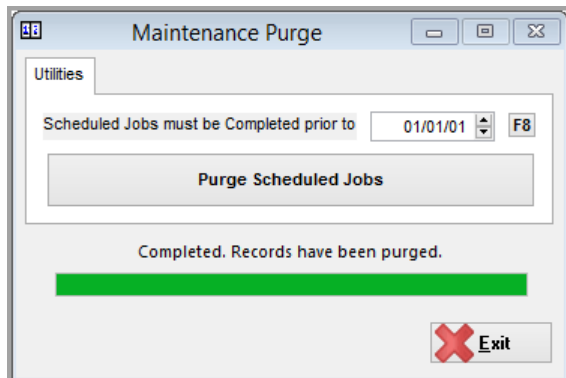


Figure: Maintenance Purge Screen

Scheduled Jobs Must Be Completed Prior To

Choose a date in this field and click the **PURGE SCHEDULED JOBS** button to remove all (job costed) jobs that fall before (not including) that date.

Calculator

Schedule Pro>Utilities>Calculator or F2 [Click Here for Details](#)

Calendar

Schedule Pro>Utilities>Calendar or F8 at any date field

With all **date** fields in RFMS, hit the **D** key to fill in today's date, type in a date, use the up and down arrows to move the date one day at a time or click **F8** to bring up the calendar and then choose the date.

[Click here for details.](#)

Order Entry/Schedule Pro Integration

Schedule Pre Related Options in RFMS



Best Practice: Require an estimated delivery date on customer orders.

The following options must be checked

>Utilities>System Options>Order Entry>Providers>Integrate Provider's Earnings, must be set to yes.

>Utilities>System Options>Order Entry>Order Entry>Automatically Post Estimated Delivery Date

This option by default is set to yes (in RFMS Order Entry). If this option is left as is, the Order Header Estimated Delivery Date will update based on scheduled line dates. For example, a job has lines scheduled for completion on May 1st and lines scheduled for completion on May 5th. In April the Order Header Estimated Delivery Date will display, as May 1, 20XX. On May 2nd, the Order Header Estimated Delivery Date will change to May 5, 20XX and stay so unless there are other dates later than that in the order (assuming nothing is added to the order). This switch is recommended in order to update the Order Header Estimated Delivery Date.

These options control a portion of the integration between RFMS Order Entry and Schedule Pro.

>Utilities>System Options>Order Entry>Schedule Pro>Schedule Pro Button on Orders Browse

Module	Applies To	Category	Option	Value
Order Entry	Schedule Pro	Interface	Schedule Pro Button on Orders Browse	Open Schedule Pro for Selected Order

Figure Pressing Schedule Pro Button on Orders Browse will

Pressing Schedule Pro Button on Order Browse

The option labeled "**Schedule Pro Button on Orders Browse**" refers to the **Schedule Pro** button on the Customer Order and Claims toolbar:



Select one of the following options for interaction with the Schedule Pro module.

Do you want alerts to be created from order entry so that a centralized office can schedule all jobs or do you want jobs to be scheduled as they are created in order entry?

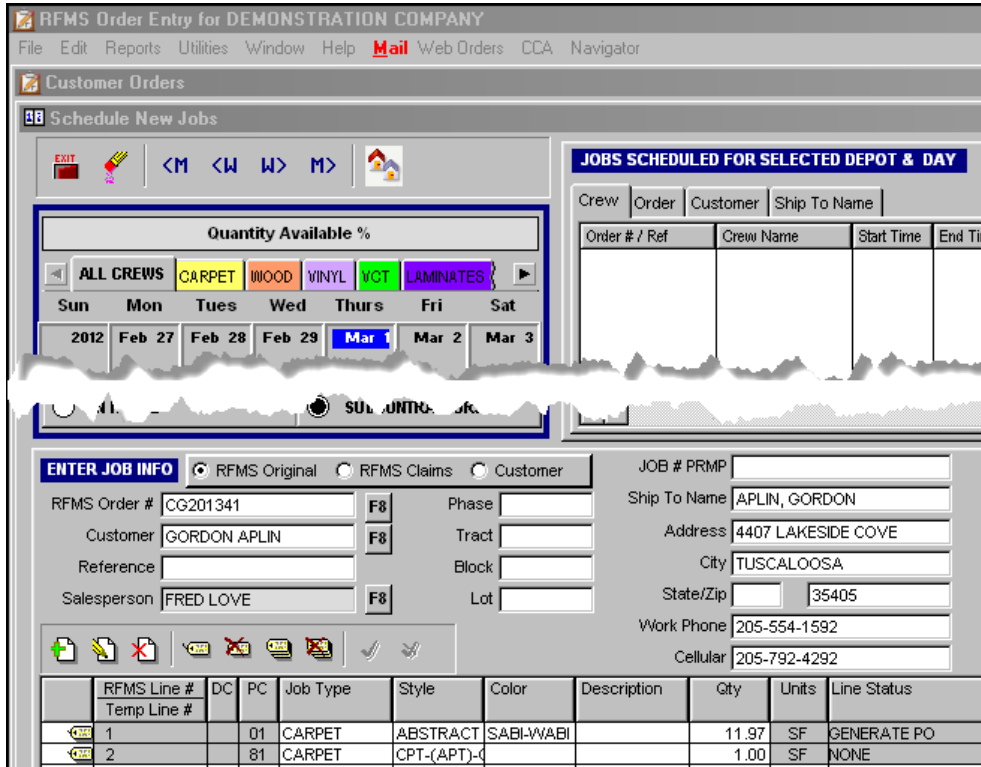
Create Schedule Pro TO BE SCHEDULED Alerts

Selecting this option will create a Schedule Pro alert for the highlighted order when the **Schedule Pro** button (located on the toolbar) is clicked. An alert indicator will be placed to the right side of the Order Number field. The alert icon is the same as the Schedule Pro icon, with one small exception - the alert will display in red. If the Order Entry people have set an Estimated Delivery Date for the order (in the Order Header), this can become the suggested schedule date, depending on the system settings. Once the job has been scheduled, the alert disappears and a regular Schedule Pro icon will appear. Note "Display Alerts on Order Entry Browse" is not selected, the red **Schedule Pro** icon will not display. However, the alert has still been created. To check these alerts go to the Schedule Pro module and click the button that is labeled **Order Entry Alerts**.

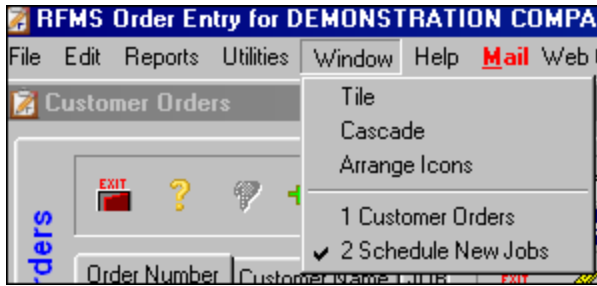
Open Schedule Pro for Selected Order

Selecting this option will allow immediate access the Schedule Pro module from the Customer Order Screen. Click the Schedule Pro icon (located on the toolbar) and the Schedule Pro module will open to the highlighted order and ask to add that job to the schedule or view existing scheduled items associated with that job. If the Schedule Pro was already open on that computer, it will bring the screen up just as it was left. Use this selection only if not creating alerts. This setting is only meant to be used by someone who should have access to adding jobs to the scheduler or editing them.

The link between Schedule Pro and Order Entry has been changed so that when the **Schedule Pro** button is clicked only the Schedule New Jobs Screen opens rather than the whole **Schedule Pro** program.



Once **Schedule Pro** is opened this way, it is available from the *Order Entry > Windows Menu*, until Order Entry is closed.



A simple version of the Schedule New Jobs Screen is available. The selection of which to use is made in *>Utilities>System Options>Schedule Pro>General>Job Schedule Screen from Order Entry.*

Alert Options

>Utilities>System Options>Order Entry>Schedule Pro>Create Schedule Pro Alerts....

Module	Applies To	Category	Option	Value	Note
Order Entry	Alerts	Interface	Create Schedule Pro Alerts for Edited Orders	No	
Order Entry	Alerts	Interface	Display Schedule Pro Alerts on Order Entry Browse	Yes	
Order Entry	Alerts	Interface	Create Schedule Pro Alert for Added Line	No	Depends on the "Create Schedule Pro Alerts for Edited Orders" Setting
Order Entry	Alerts	Interface	Create Schedule Pro Alert for Deleted Line	No	Depends on the "Create Schedule Pro Alerts for Edited Orders" Setting
Order Entry	Alerts	Interface	Create Schedule Pro Alert for Edited Line Qty	No	Depends on the "Create Schedule Pro Alerts for Edited Orders" Setting
Order Entry	Alerts	Interface	Create Schedule Pro Alert for Edited Line Style, Color or Units	No	Depends on the "Create Schedule Pro Alerts for Edited Orders" Setting
Order Entry	Alerts	Interface	Create Schedule Pro Alert for Line Status Cut or Reserved	No	Depends on the "Create Schedule Pro Alerts for Edited Orders" Setting
Order Entry	Alerts	Interface	Create Schedule Pro Alert for Voided Order	No	Depends on the "Create Schedule Pro Alerts for Edited Orders" Setting

Figure: Order Entry SP alert Options

Create Schedule Pro Alerts for Edited Orders (checkboxes)

These options determine whether to create an alert when someone changes an order in Order Entry AFTER it has been scheduled. We recommend leaving this box checked to "Yes" as to make sure changes made after scheduling don't fall through the cracks. If each choice below this line is left to "Yes" an alert is automatically created, thus turning the regular Schedule Pro icon to red in the Order Entry browse until the alert has been dealt with on the scheduling side, for the following scenarios:

- Order Voided
- Order Line Deleted
- Order Line Added
- Order Style, Color, or Units Edited
- Order Quantity Edited

Order Status Set to Cut or Reserved

(This creates an alert every time material is received *for a job that is already scheduled*, and for many users, should be left off, as it creates so many alerts, it can be difficult to keep up with them.)

The Schedule Pro users can browse through these alerts, make appropriate changes, sometimes at the push of a button (to remove deleted lines from a scheduled job, for example), and then delete the alerts so the people in the Order Entry screens will be able to see that the icon has gone back to normal, thus the scheduled job is fine.

Display Schedule Pro Alerts on Order Entry Browse

Selecting this option will display the red/green Schedule Pro icon to the right of the **order number** field on the **customer order** Line. If this option is deselected, the alert icons will no longer display. However, alerts may still be accessed by clicking on the **Order Entry Alerts** button in the Schedule Pro module.

This also controls whether or not the schedule icon will display next to orders which have lines scheduled.

Schedule Pro Icons in RFMS Order Entry

Alerts



This icon indicates that the job has been marked To Be Scheduled. There is a corresponding "To Be Scheduled" alert in Schedule Pro.



This icon indicates that there is an alert other than a "To be scheduled alert," related to the order. Indicating that an order has been changed since the job was scheduled, and as a result there is an Order Entry Alert in the Schedule Pro. Once the alert has been deleted from Schedule Pro (whether or not the discrepancy has been fixed,) this icon will change to the schedule icon.

Scheduled



This icon indicates that the line item or job has already been scheduled.

Important Considerations for Customer Orders

The estimated delivery date on the job header or the job lines can be very important as schedule pro uses this date to place the job on the schedule, if not included the date will default to today's date.

RFMS Worker Information

RFMS Accounting>File>Human Resources>File>Worker Information

Schedule Pro integrates with Order Entry when entering a provider record to keep the pay status associated with installers or suppliers in the RFMS application.

The following information must be set in the provider's worker information file in RFMS Core Human Resources.

A worker must be **active** to be available in Schedule Pro. If marked, Do Not Pay status in Human Resources, this will carry over to the provider record entered.

Check the **Provider** box for all workers who will provide services that will be posted as a cost against jobs in the Provider's module of Order Entry. This could apply to all types of workers. This box must also be checked for this worker to be available in Schedule Pro for jobs to be scheduled to them.

Checking this box makes the pay status and Do not Accrue boxes later on this screen active.

Selecting the **Scheduler** option will allow this particular worker to be available in Schedule Pro to schedule jobs. Selecting this box plus the Provider box allows a worker to be available for jobs.

Passwords

Password protect any button, field or screen in Schedule Pro.

Schedule Pro utilizes the same password functionality as the RFMS programs. Any button, except the **F8** buttons, can be password protected based on the security levels set in RFMS. Change into Set Password Mode by pressing the **F6** key. The top level password is required to do this.

Log in with the TOP Administrator Password. Go to the screen that contains the button to protect.

1. Press the **Ctrl-Alt-F6** key.
2. Click the button to protect.
3. A list of all passwords will show.
4. Select the password level to assign to this button and click the **Select** button.
5. Then click **Ctrl-Alt-F6** to exit password mode.
6. To view more information on using Passwords, refer to the help found in the Order Entry module of the RFMS core product.
7. If using "Password on Entry Only" in the Core RFMS, Schedule Pro will use that setting as well, which allows the ability to enter a password upon opening the program, and then allows entry to all authorized areas without reentering a password. In this case, a user will only be prompted for a password if the area they are attempting to enter requires a higher level password than the one used to log in.



Notes:

If using Enterprise Manager, it will apply to Schedule Pro, just as it does to any other RFMS product. Set up a group of Schedulers, and assign permissions accordingly. Edits on various tables in Schedule Pro may also be tracked.

File Menu


Scheduled Jobs

Schedule Pro>File>Scheduled Jobs

View or edit scheduled jobs from this screen. The bottom section gives the scheduled lines for the job highlighted in the top portion. Jobs listed here are determined first by the default settings in *>Utilities>System Options>Schedule Pro>General>Category: Default Filters*. Use the find button to locate other jobs. To go back to the default settings while still in the screen, use

the reset button.  The clear filter button  will set the find to include all records.

Multiple Day Jobs

If a job is scheduled for more than one day, a BLUE Plus sign is displayed next to the Start Date. 

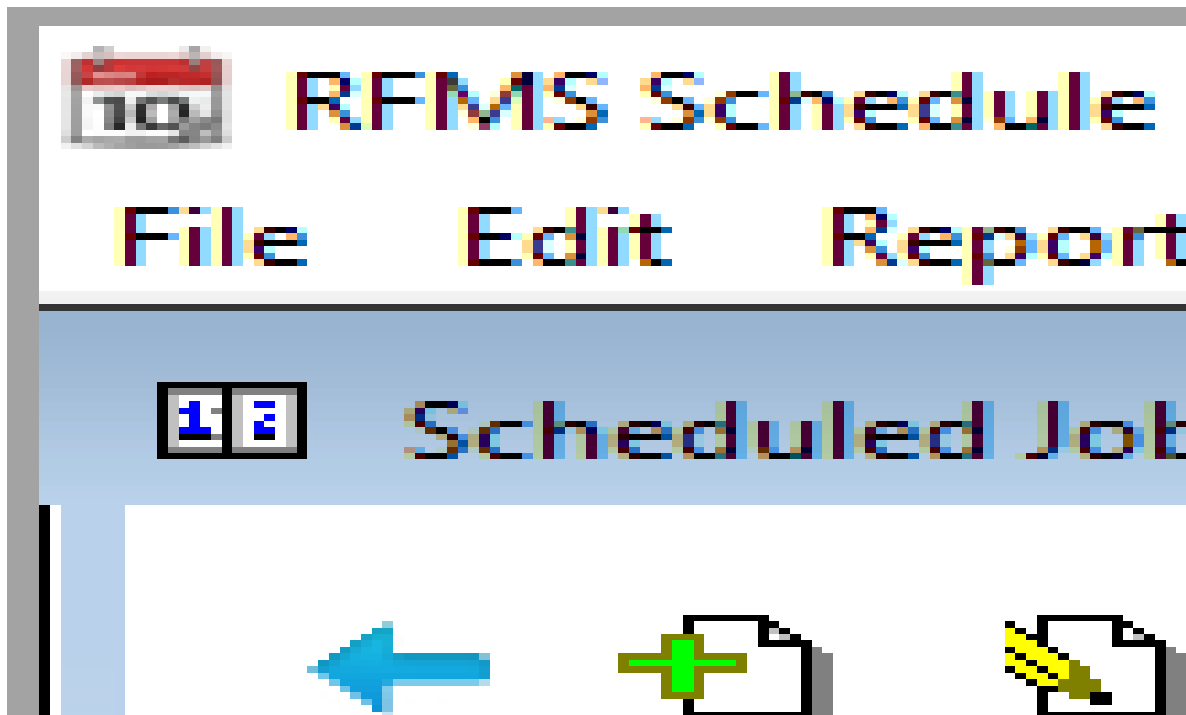


Figure: Scheduled Jobs Screen

Tool Bar


Tools available here can be customized so all options listed may not be visible on the screen.

Add: Click the **insert** button to schedule a new job.

Edit: Click the edit button to change the highlighted job. (This is the equivalent to the old edit and complete feature). [Click here for details on the changing scheduled job screen.](#)

Delete: Click the **delete** button to delete the highlighted job from the schedule.

Tagging: Tagging **jobs** on this screen is used only for mapping. **Lines** can be tagged on the highlighted jobs for printing on work orders or work tickets if this option is chosen. All other functions apply to the highlighted job. When a line is tagged, a printer icon is shown next to it to indicate this.

Print work order: Highlight the jobs to print and then click the print work order button . The options here are the same as printing a work order from Order Entry. [Click here for details.](#)

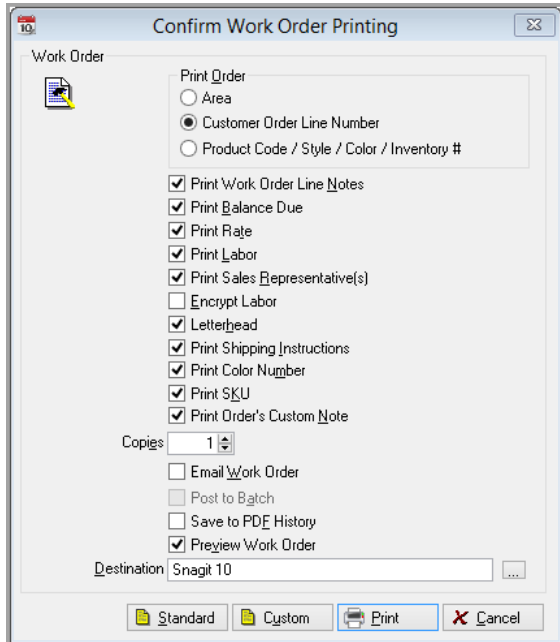



Figure: Confirm Work Order Printing

Print schedule pro work ticket: Highlight the jobs to print and then click the print schedule pro work ticket button .

Clicking this button will print a work ticket for the highlighted job. Choose a single line by tagging it. The ability was added to tag lines by clicking in the left column on the record in version 10.5.6. Choose the information to be included on the ticket by checking the boxes in the print options screen. If two crews are scheduled for one job, as of version 10.5.6 they will both be included on the work ticket.

Display Print Options

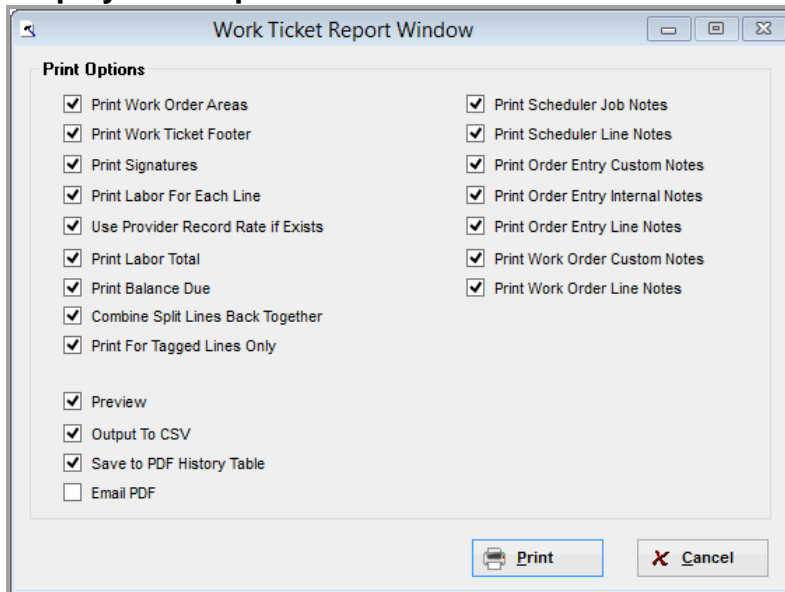


Figure: Print Options Screen.

Work Order Areas

Checking this box will print the order line areas from the RFMS Work Order on the work ticket. If there are multiple RFMS work order line areas for one order line, they will all be printed on the Schedule Pro work ticket.

Work Ticket Footer

Checking this box will print the work ticket footer as set up in *>Utilities>System Options>Schedule Pro>Work Tickets>Work Ticket Footer* on the work ticket.

Print Signatures

Checking this box will print signature lines on the work ticket.

Print Labor for Each Line

Checking this box will show the dollar amount

Use Provider Record Rate if Exists

Checking this box will use the Provider Record Rate

Print Labor Total

Checking this box will show the total dollar amount

Print Balance Due

Checking this box will show the dollar amount due on the order.

Combine Split Lines Back Together

Checking this box will take a multiple day job and combine the information to only be printed on day one.

Print for Tagged Lines Only

Checking this box will require the lines to print to be tagged on the view scheduled job screen.

Preview

Checking this box will allow viewing the work ticket on the screen before printing.

Output to CSV

Checking this box will allow the work ticket to be sent to a csv file which can be used like an excel file.

Save to pdf History Table

Checking this box saves a pdf copy of the work ticket which can then be viewed or printed later.

Email PDF

Checking this box will allow a PDF of the Work Ticket to be emailed.

Scheduler Job Notes

Checking this box will print the header notes from Schedule Pro on the work ticket.

Scheduler Line Notes

Checking this box will print the line notes from Schedule Pro on the work ticket.

Order Entry Custom Notes

Checking this box will print the custom notes from the RFMS Header on the work ticket.

Order Entry Internal Notes

Checking this box will print the internal notes from the RFMS Header on the work ticket.

Order Entry Line Notes

Checking this box will print the Line notes from the scheduled RFMS order line.

Work Order Custom Notes

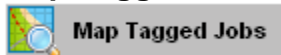
Checking this box will print the custom notes from the RFMS Work Order on the work ticket.

Work Order Line Notes

Checking this box will print the order line notes from the RFMS Work Order on the work ticket. If there are multiple RFMS work order line notes for one order line, they will all be printed on the Schedule Pro work ticket.

Work tickets can also be printed for a group of jobs from the [Quick Schedule Screen](#).

Map Tagged Jobs



Clicking this button will connect with Bing maps with the tagged location(s) marked on the map. The system asks if you would like to use the current store as the starting location, otherwise a starting point can be manually entered on Bing. Print the map from Bing. When done use the **OK** button to close the web site.

Scheduler Job Notes



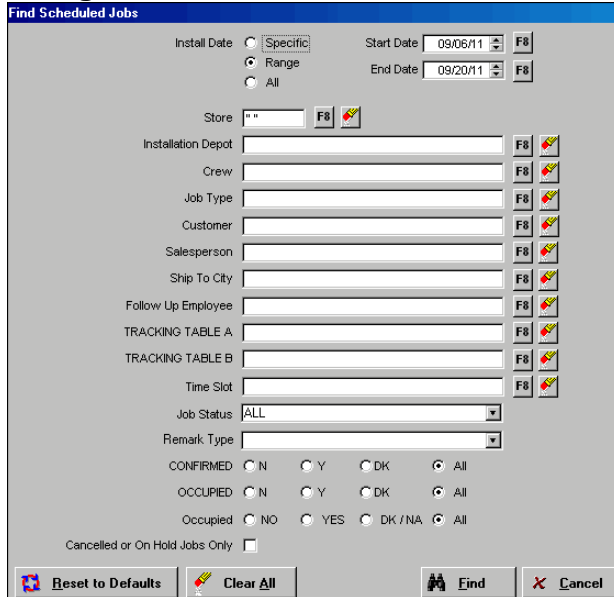
Clicking this button will allow adding or viewing notes added to the job header from Schedule Pro. If notes are present a note icon will show next to the invoice number.

View All Notes



Clicking this button will allow viewing all related notes including CMM remarks. A note icon will show next to the invoice number only if schedule pro notes are present.

Using Find for a More Streamlined Search



If a find is applied, any searches will only look at the records from within the filtered list. Check the find setting if an expected record is not found.


Find by Install Date

- | | |
|----------------|--|
| Specific | Looks at a single day |
| Range | Looks at a group of days. Enter the Start and End date |
| All | Looks at all days |
| Cancelled Only | This gives jobs with no dates and times. See Cancelled . |

Other Finds

All other Find options on this screen can be used by themselves or as a combination. They give very powerful methods of working with and searching for scheduled jobs. To include all records within a specific category, leave the field blank. Otherwise, click the **F8** button to select a specific Find from the corresponding list. To remove data from a field click the **Clear** button.



Notes about using Finds

If Finding by Job Type, only line items for the specific material will display. If a job does not have any lines items of that material, the job will not display at all. The default Store Code is applied automatically. To view all store codes, click the clear button. 

Remark Type

The remark type was added to the options for finding scheduled jobs in, Scheduled Jobs, Quick Schedule, Quick Edit, Weekly Grid and Create Providers. Only scheduled jobs with the selected

remark type will be found. Remarks can be added to scheduled jobs in Client Management or via the Client Management Remote Actions Button  while in Schedule Pro. (Version 11.1)

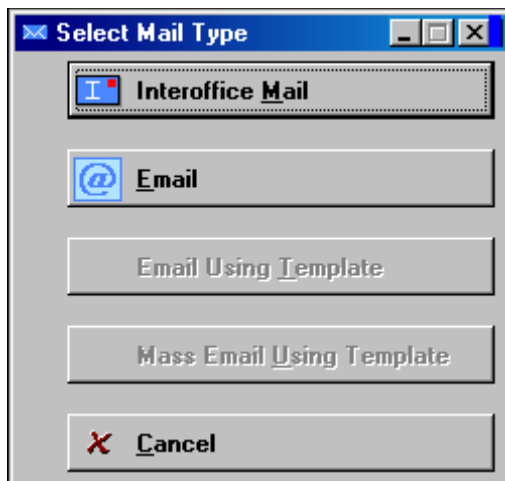
To go back to the default settings while still in the screen, use the reset button.  The clear filter button  will set the find to include all records.

Search

Click the **Search** button to search for scheduled jobs by specific fields within the find set above. Click the **reset** button to clear this **Search**.



Mail Options

Options

Interoffice Mail: Click this button to send an internal RFMS mail message regarding the highlighted record

Email: Click this button to send a blank email with the signature information added during set up.

***Email Using Template:** Email templates can be set up for Client Management Retail and Commercial users.

***Mass Email Using Template:** From Client Management Retail or Commercial, Tag multiple prospect or customer records then send a template email

Cancel: Exit without any action

[* See CMM New features for details.](#)

PDF History

Click the **pdf history** button to view all reports printed and saved to pdf history for the highlighted record.

Client Management Module



Click the CMM button to bring up the CMM remote actions screen and add a CMM action or relate a CMM record to this record.

Edit a Job

Schedule Pro>File> Scheduled Jobs>Edit Button or Scheduled Jobs>Edit>Change

Highlight a job in Scheduled Jobs or on the grid, and then double click to change the record.

The screenshot shows the 'Changing Scheduled Job Record' window. It is divided into several sections:

- Installation Depot & Primary Crew:** Fields for Installation Depot (N HOUSE), Primary Crew, Secondary Crew, and Warehouse Prep.
- Dates:** Fields for Start Date (04/21/06), End Date (04/21/06), and Time Slot (MID-ED).
- Order & Customer Information:** Fields for RFMS Order #, Reference (CHECK AREA IN VINYL), Customer (BLACK, SIDNEY), Salesperson (MICHAEL), and address information.
- Job Status:** Fields for Job Status (IN PROGRESS), Follow Up Employee, and Tracking Tables (CERAMIC REPAIR).
- Edit Information:** Fields for Date Entered (04/20/06), Scheduled By (MADELYN ROMAINE), and Last Date Edited.
- Scheduled Job Lines:** A table with columns for Line #, DC, PC, Job Type, Style, Color, Description, Crew Name, Line Status, Units, Qty, Date, Start Time, and End Time. One line is visible: Line # T1, Job Type VINYL, Style CHECK, Description AREA KITCHEN, Line Status TEMPORARY, Units SF, Qty 1.00, Date 04/21/09, Start Time 8:00 AM, End Time 0:00.
- Job Type Totals:** A small table showing Job Type (VINYL), Qty (1.00), and Dollars (\$0.00).

Figure: Changing scheduled job screen

Tool Bar

Tools available here can be customized.

Email Job Schedule



From the **Changing a Scheduled Job** screen, click the **email** button. This creates an email through Outlook. The outlook message can then be edited or have other files attached. The email address is pulled from the order associated with the scheduled job. If an email address was entered in *system options* it will automatically be carbon copied on the email.

The screenshot shows an Outlook email window titled 'Scheduled Installation For LAW, JOHN - Message (HTML)'. The 'To' field is 'lawsthe.law.@law.com' and the 'Subject' is 'Scheduled Installation For LAW, JOHN'. Below the subject, it shows 'Scheduled Start Date: 12/11/09' and 'Scheduled Completion Date: 12/12/09'. The interface includes a ribbon with 'Message', 'Insert', 'Options', 'Format Text', and 'Adobe PDF' tabs, and various toolbars for editing and sending.

Figure: Sample email generated from Schedule Pro

View Alerts



Click this button to view the [Order Entry Alerts & Tracking Notes Screen](#).

Add Alerts



Click this button to add a [tracking note](#).

View Order



Clicking this button allows the order information related to the job to be viewed.

ORIGINAL ORDER | View Work Order Custom Notes | View Internal Notes | View Custom Notes | Images

Sold To
 Customer: T & B CONSTRUCTION # []
 Address: 12301 WINTER DRIVE []
 City: BROOKWOOD []
 State: AL Zip: 35444 []
 County: TUSCALOOSA []

Ship To
 Customer: T & B CONSTRUCTION []
 Address: 15567 WALDEN POND RD []
 City: BROOKWOOD []
 State: AL Zip: 35444 []
 County: TUSCALOOSA []

Lot Information
 Lot: []
 Block: []
 Tract: []
 Phase: []

Order Information
 Store: [] Billing Group: [] Customer Type: NEW RESIDENTIAL
 Order #: CG803482 Salesperson 1: MIKE
 JOB Info: 15567 WALDEN Salesperson 2: []
 PO Number: CARPET/WOOD Ad Source: []
 Order Type: [] Contract Type: []
 Work Phone: 205-361-7783 Service Offering: []
 Cellular: [] Email: []

Dates
 Order Date: 11/24/08
 Measure Date: []
 Est Del Date: 01/05/09
 Delivery Date: 01/20/09
 Bill Date: 01/20/09
 Invoice Date: 01/20/09
 Close Date: 01/20/09

Order Total
 Material: 4,214.75
 Labor: 2,352.75
 Misc Charges: 0.00
 Sales Tax: 0.00
 Misc Tax: 0.00
 Order Total: 6,567.50
 Balance: 0.00

Original Order Lines | View Line Notes | Line Images

Line #	PC	Roll/Item #	Style/Item	Color/Desc	Width	Length	Quantity	Units	Price	Line Total	Status	Est Del Date
1	07	WEL13-40	PDRRINGER (SADDLE	0'3"	0'0"	888.00	SF	3.44	3,053.75	Job Costed	01/05/09
2	87	PL/GE	PLANK (GLUE				888.00	SF	2.25	1,995.00	Job Costed	01/05/09
3	07	7120-4G	ADHESIVE-TA	H/W-ROCK	0'0"	0'0"	25.00	GA	0.00	0.00	Job Costed	01/05/09
4	01	QA803347	JOURNEY S -	RIVERBED	12.00	56.25	75.00	SF	13.23	992.25	Job Costed	01/20/09
5	81	CP/BA-S	CPT-(BASIC)-S				675.00	SF	0.53	357.75	Job Costed	01/20/09
6	04	BRONZE-7/16	BRONZE-BASI	3.5# REBOI	6'0"	6'0"	675.00	SF	0.25	168.75	Job Costed	01/20/09
7	07	RE08-R	REDUCER-FLC	UNF-RE08-R	0'0"	0'0"	24.00	LF	0.00	0.00	Job Costed	01/20/09
8	01	550115S	JOURNEY S -	RIVERBED	12.00	11.75	15.67	SF	0.00	0.00	Job Costed	01/05/09

Figure: View Order Detail



The next buttons allow viewing the specific notes related to the job. If permission is set in system options notes in RFMS can be added or edited here also.

Buttons that are labeled **Scheduler Notes** or **Scheduler Line Notes** may be added, edited or changed in the Schedule Pro Program without special permission. When a note is added to a job, the button letters turn Green and a note icon is displayed in the far left column.

Installation Depot & Primary Crew

The store number is displayed in the upper right hand corner of this area. This area includes fields for information in addition to that which was entered on the schedule screen.

Installation Depot

If the depot is changed and does not match the current crew, a message will display warning that the crews will be deleted.



Primary Crew

If initially assigned to a crew, that crew will show here. A crew can be assigned or changed on this screen, but the crew and the depot must match.

Secondary Crew

Picking a crew here would be for display purposes only, to actually assign quantities and show on the grid use the [Split lines tool](#).

Warehouse Prep

To be available as a choice, the person must be checked in HR active and scheduler but not a provider.

Available on these reports:

- Daily Schedule by Date (Landscape)
- Daily Schedule by Date & Time (Landscape)
- Daily Schedule by Crew (Landscape)
- Daily Schedule by Order (Landscape)
- Material Status Report with PO Information (Landscape)
- Job Summary Report – Detailed 1 (Landscape)

Job Status

Job Status

Click the **F8** button to choose one of the statuses created during the set up process.

Follow Up Employee

To be available as a choice, the person must be checked in HR active and scheduler.

Follow Up Description

Free form; does not show on any reports.

Tracking Table1 and 2

User Defined 1 & 2

Occupied

If this is included in order entry the information will be pulled from the order header. In addition, if this is changed in schedule pro, it will update the order header.

Pre Walk Date

Enter the date.

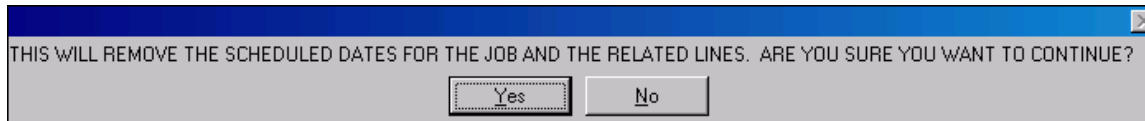
Dates

Job Cancelled or On Hold

If the job is cancelled, the system will place a check mark in this box.

Cancel Job

If a job is cancelled and not rescheduled, click the **cancel job** button which will remove the scheduled dates, but keep any associated alerts. Cancelling will also prompt adding a tracking note. A warning message will show to prevent accidental cancellation. Filters have an option to search for cancelled jobs. When rescheduling the jobs, the lines will show zero quantity.



Scheduled Date/ Time/ Time Slot

Scheduled information can be edited here. The start date can be edited here, but adding days to the job must be done using the [Split lines tool](#). When changing the number of days on a job, do not change the "End Date" of the job.

Actual Date Time

This allows recording the scheduled information vs the actual. This method is not recommended because if used the actual on the lines must be edited each time it differs; most people simply edit the scheduled information.

EDIT JOB LINES										Job Total Dollars			
										\$0.00			
										Actual			
RFMS Line #	DC	PC	Job Type	Style	Color	Description	Crew Name	Line Status	Units	Qty(+)	Date	Start Time	End Time
Temp Line #													
T1			CARPET INST.					TEMPORARY	\$Y	0.00			

Stop

10 Characters available. Some clients use this for routing jobs. Several jobs may be scheduled for the same time slot then prioritized by location or importance using the stop field.

Skip

The scheduled information can be edited here.

Edit Information

Date Entered

This information is automatically collected by the system.

Scheduled By

Can be automatically entered if so set in *Utilities>System Options>Schedule Pro>General>Default User* otherwise either type the appropriate name or choose it using the **F8** button. For a person to be included in the pick list, they must be checked as a Scheduler in RFMS Human Resources.

Edited By

Can be automatically entered if so set in *Utilities>System Options>Schedule Pro>General>Default User* otherwise type this information in.

Reason for Edit

This can be a required field. Set in *Utilities>System Options>Schedule Pro>Scheduling>Warning Messages*.

Order & Customer Information

Most of this information is brought over from the original order or claim. If necessary, the information can be edited here. If the information that needs to be changed is on the order or claim, it is best to change it in RFMS Core. Then click the **Update Info** Button to make the changes in Schedule Pro. If the field mapping is changed, clicking this button is required to apply the changes to *each* previously scheduled job.

Edit Job Lines

Deduct # of Crews	1.00	Job Total Dollars	\$277.60
-------------------	------	-------------------	----------

Deduct Number of Crews

For use with [manually deduct # of crews](#). Shows the number deducted and will editing that number here.

Job Total Dollars

Job Type Total \$ - Total sale dollar amount for the deduct capacity products. Line Units have to match the Job Type Units.

Scheduled Job Lines Job Total Dollars | \$2,250.00

RFMS Line # Line #	DC	PC	Job Type	Style	Color	Description	Crew Name	Line Status	Units	Scheduled				Actual			
										Qty	Date	Start Time	End Time	Qty	Date	Start Time	End Time
1		01	CARPET	BEAUTIFUL	MOCHA			NONE	SY	13.00	08/04/11	8:00 AM		0.00			
1		01	CARPET	BEAUTIFUL	MOCHA			NONE	SY	15.00	08/05/11	8:00 AM		0.00			
1		01	CARPET	BEAUTIFUL	MOCHA			NONE	SY	15.00	08/06/11	8:00 AM		0.00			
2		04	CARPET	7# A&H FORB	7# PAD			NONE	SF	16.67	08/04/11	8:00 AM		0.00			
2		04	CARPET	7# A&H FORB	7# PAD			NONE	SF	16.67	08/05/11	8:00 AM		0.00			
2		04	CARPET	7# A&H FORB	7# PAD			NONE	SF	16.66	08/06/11	8:00 AM		0.00			
3		13	LAMINANTE	1801 POLAR	WILSONART			GENERATE PC	EA	166.65	08/04/11	8:00 AM		0.00			
3		13	LAMINANTE	1801 POLAR	WILSONART			GENERATE PC	EA	166.65	08/05/11	8:00 AM		0.00			
3		13	LAMINANTE	1801 POLAR	WILSONART			GENERATE PC	EA	166.70	08/06/11	8:00 AM		0.00			
4		81	SERVICES SF	CPT INST BE				CUT	SF	1,655.50	08/04/11	8:00 AM		0.00			
4		81	SERVICES SF	CPT INST BE				CUT	SF	1,655.50	08/05/11	8:00 AM		0.00			
4		81	SERVICES SF	CPT INST BE				CUT	SF	1,667.00	08/06/11	8:00 AM		0.00			
5		81	SERVICES SF	TESTING SY				CUT	SY	166.65	08/04/11	8:00 AM		0.00			

Line Information

Click the **green plus** button to add a temporary line.

Click the **pencil** button to change the highlighted line.

Click the **red x** button to delete the highlighted line from Schedule Pro; it will not delete the line from the order.

Click the **Mail** button to send an interoffice mail message about the highlighted scheduled job line.

Click the **green check** button to make the highlighted line a deduct capacity line. This is restricted to items with the same unit of measure as the job type.

Click the **green check** button **with a red mark** to make the highlighted line not deduct from capacity.



When a line is untagged, the green check (Deduct Capacity Line) will be removed. When it is retagged, the green check (Deduct Capacity Line) will be put back.

Split Lines Tool

This tool allows job lines to be split between either crews or days.

Split lines will allow determining the number of days, and even the percentage to go to each day. (To schedule a Tuesday & Thursday job, do 3 days with 50% on Tuesday and 50% on Thursday, then "Apply Split" and it will show as T / Th on the grid, and show that crew as being free on Wednesday.) It is key that after setting the number of days, the percentages add up to 100, and then click "Apply Split." This screen can also be used to split jobs over multiple crews, not just multiple days.

The grid itself looks at the lines on the job to determine the quantity it is attributing to each day. So, it is key to split the lines, not just change the header dates.

Then, hit "Apply Split" to affect the change, and save the job as normal.

Use this tool to split a job between crews

First, schedule the job. (NOTE: If a "Secondary Crew" is added without splitting the lines, it will not show on the grid or many of the reports for that secondary crew.)

In the Split Lines screen, up to 10 total crews can be added, and a percentage of the overall quantity of the job assigned to each. The percentages must add up to 100.

Change Job Line Crew: Click the button to change the crew on the highlighted line only.

RFMS Order Line Notes: Click this button to view only notes on this line which were added to the order line in RFMS Core.

RFMS Work Order Line Notes: Click this button to view only notes for this line which were added to the work order in RFMS Core.

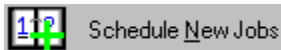
Scheduler Line Notes: Click this button to add or view notes on this line

Job Type Totals

This shows the total by Job Type of deduct capacity lines. The dollars = selling price.

Schedule New Jobs

Schedule Pro>File>Schedule New Jobs



Scheduling new jobs is easily done using the **Schedule New Jobs** function. From this screen, select an RFMS Customer Order, assign a crew and pick an available day for installation. The Schedule Pro program can determine the availability of crews by skill level, depot and daily capacities based upon data entered in the configuration areas of each category. Refer to those sections of the user guide for detailed instructions on setting up the Schedule Pro software.



To clear all the fields and reset the screen click this button.



Clicking this button displays the scheduling information for a different store.

CHANGE CURRENT STORE			
EXIT		SELECT	
Store	Store Name	Primary Installation Depot	Secondary Installation Depot
100	COMMERCIAL FLOORIN	MY DEPOT	
✓ 200	COMMERCIAL FLOORIN	STORE 200 DEPOT	
300	THE DESIGN GROUP		
900	GENERAL & ADMIN		

✓ = Current Store

Figure: Change Store Screen

On the **Change Store** Screen, high light the store to change to then either double click or click the **select** button.

Crews Available for Scheduling (The Calendar Area)

Reset Calendar Days

<M <W W> M>

Click to move the calendar forward or backward a month or week at a time.



At the top of the calendar, a dropdown menu is displayed that match up with the [job types](#) entered in the Setup area. Clicking on each tab displays the individual capacities for each job type. The ALL CREWS tab shows the depot capacities combined. The tab order is also set in [system settings](#).

- The date currently being worked with is changed to a BLUE color.
- Clicking on a calendar date box changes the Start Date for the job currently being scheduled.

The Crew Capacity is shown for each day for easy determination of which dates are available for scheduling. With the All Crews tab selected, the capacities are a total of all product types to show total capacity for the depot. Otherwise, clicking on each job type tab displays the capacity for that job type alone. If viewing capacities by quantity instead of by crew as set in *>Utilities>System Options>Schedule Pro>Capacity Settings> View Installation Depot Capacities By*, the capacity for the All Crews tab is shown in percentages.

2013	Oct 28	Oct 29	Oct 30	Oct 31	Nov 1	Nov 2
0	38	29	17	-25	100	100

Crew Capacity Color Code Legend:

Green	No jobs scheduled
Blue	Less than 75% used
Orange	Over 75% used
Red	100% booked or overbooked (can be negative numbers)
Black	Crews do not work on that day

Select on the bottom of the calendar whether to view in house or subcontractors.



Notes:

If scheduling most without selecting a crew, be aware that the specific job type tabs are not always going to be accurate. A job scheduled without a crew will deduct capacities from job type tabs that are being scheduled and from the ALL CREWS tab but it will not deduct anything from other job types. Since the crew is unknown, it is not possible to determine how the other job type capacities would be affected. For example, if a crew is selected for a carpet job and they install carpet and vinyl, then both the carpet and vinyl capacities will be reduced (the crew can't install both at the same time). But, if a crew is not selected for a carpet job, only the carpet capacities will be reduced. That is because without a crew selected, the system can't forecast the abilities or capacities of future crew assignments. Pay close attention to the ALL CREWS tab, it always considers the overall picture.

Enter Job Information

RFMS Line #	Temp Line #	DC	PC	Job Type	Style	Color	Description	Qty	Units	Line Status
	1		01	CARPET	SHAYLA	CHESTNUT	ALL CPT AREA	658.50	SF	NONE

This area is where the customer order information is selected or entered. In addition, lines for each product to be installed are either entered as a temporary line or tagged (if the lines exist on the RFMS Order already).

Job Type:

Click one of the option buttons.

Set the default under *Utilities>System Options>Schedule Pro>Scheduling>Order Type*

- **RFMS Original:** Choosing this option allows access to customer orders entered in the RFMS Order Entry module. The following information will be brought over from the RFMS order if present: Customer, Salesperson, Phase, Tract, Block, Lot, Job Number, and Ship to Information, Telephone numbers.
- **RFMS Claims:** Choosing this option allows scheduling a job entered as a claim by using the **F8** key. The following information will be brought over from the RFMS Claim if present: Customer, Salesperson, Phase, Tract, Block, Lot, Job Number, and Ship to Information, Telephone numbers.
- **Customers:** When this option is selected, choose a customer name from the RFMS Customer list by using the **F8** key, or type in the customer information. The Order # field will be grayed out with this option.



Notes:

Jobs may not be scheduled across stores. A workstation set for store 1 may not pick a customer order from store 2, etc. The store code within Schedule Pro must be changed to work with orders from other store codes. The current store code can be changed from this



screen by clicking on the **change store** button.

RFMS Order

For RFMS Original or RFMS Claims, type an order number in or use the **F8** key to display the list of available orders or claims.

The **F8** key brings up the **Select RFMS Order to Schedule Screen**.

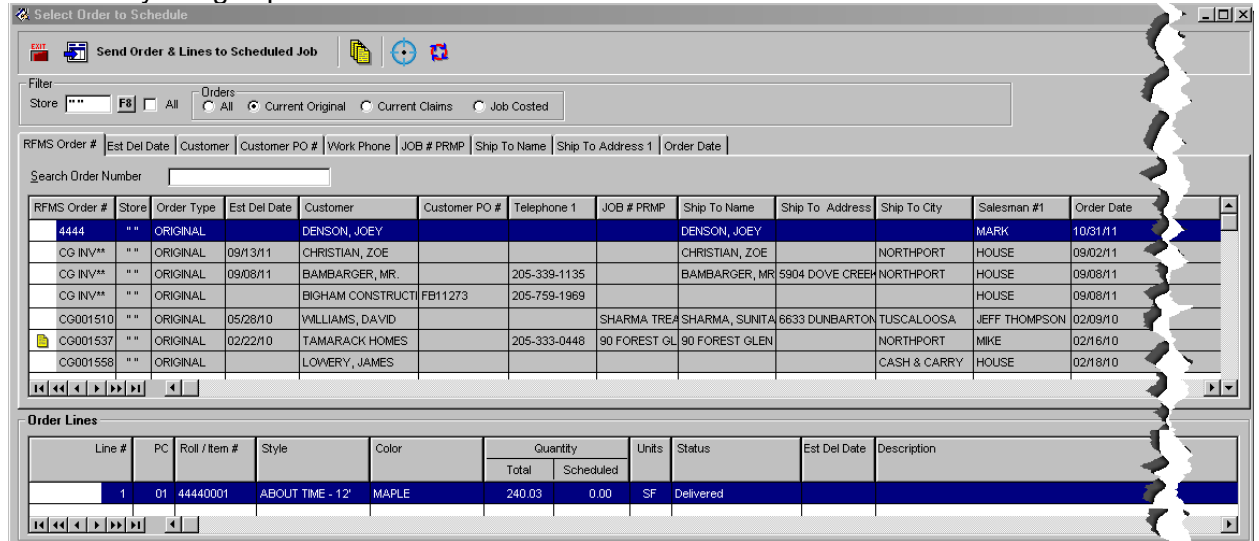


Figure: Select RFMS Order to Schedule Screen

View All

Click the view all button to see notes for the highlighted record.

Search

Click the search button for additional search options.

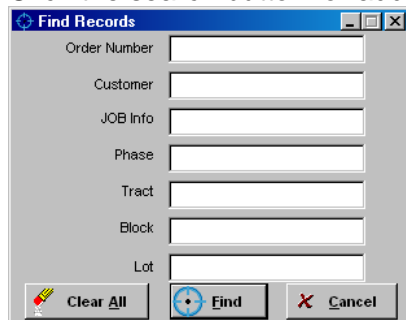
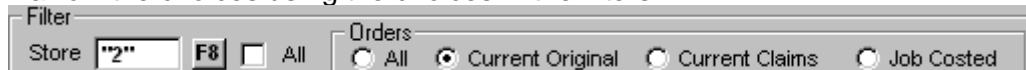


Figure: Find Records Screen

Filters

Narrow the choices using the choices in the filters.




Tabs


The search fields on each tab can also be used to narrow the choices. Clicking the tab will order the list information by the tab information.

RFMS Order	Customer	Job Scheduled Start Date	JOB Info	Ship To Name	Ship To Address 1	Ship To City
Search Order Number		<input type="text"/>				

Order Lines

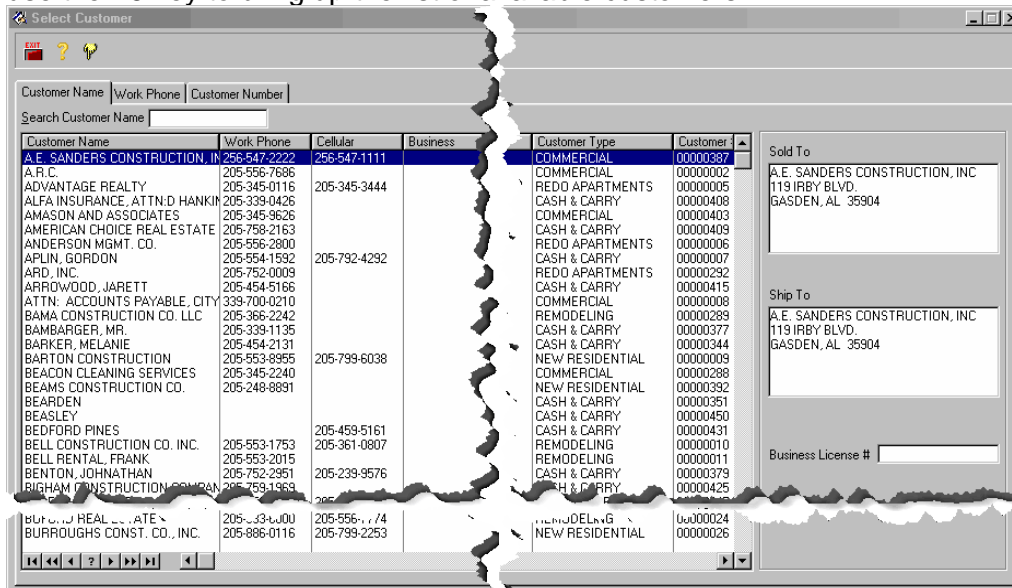
This section shows all the lines on the highlighted invoice. Lines which are already scheduled are marked with a symbol. 

Once the correct invoice is located, click the button to work with this order.

 **Send Order & Lines to Scheduled Job**

Customer

If a customer order or claim is used, this will be filled in. A customer name may be typed in or use the **F8** key to bring up the list of available customers.



The screenshot shows a window titled "Select Customer" with a search field and a list of customer records. The records are organized into columns: Customer Name, Work Phone, Cellular, Business, Customer Type, and Customer ID. The first record, "A.E. SANDERS CONSTRUCTION, INC.", is highlighted. To the right of the list, there are fields for "Sold To" and "Ship To" information, both containing the address "A.E. SANDERS CONSTRUCTION, INC. 119 IRBY BLVD. GASDEN, AL. 35904".

Customer Name	Work Phone	Cellular	Business	Customer Type	Customer ID
A.E. SANDERS CONSTRUCTION, INC.	256-547-2222	256-547-1111		COMMERCIAL	00000387
A.F.C.	205-556-7686			COMMERCIAL	00000002
ADVANTAGE REALTY	205-345-0116	205-345-3444		REDO APARTMENTS	00000005
ALFA INSURANCE, ATTN: D. HANKIN	205-339-0426			CASH & CARRY	00000408
AMASON AND ASSOCIATES	205-345-9626			COMMERCIAL	00000403
AMERICAN CHOICE REAL ESTATE	205-758-2163			CASH & CARRY	00000409
ANDERSON MGMT. CO.	205-556-2800			REDO APARTMENTS	00000006
APLIN, GORDON	205-554-1532	205-792-4292		CASH & CARRY	00000007
ARD, INC.	205-752-0009			REDO APARTMENTS	00000292
ARROWOOD, JARETT	205-454-5166			CASH & CARRY	00000415
ATTN: ACCOUNTS PAYABLE, CITY	339-700-0210			COMMERCIAL	00000008
BAMA CONSTRUCTION CO. LLC	205-366-2242			REMODELING	00000289
BAMBARGER, MR.	205-339-1135			CASH & CARRY	00000377
BARKER, MELANIE	205-454-2131			CASH & CARRY	00000344
BARTON CONSTRUCTION	205-553-8955	205-799-6038		NEW RESIDENTIAL	00000009
BEACON CLEANING SERVICES	205-345-2240			COMMERCIAL	00000288
BEAMS CONSTRUCTION CO.	205-248-8891			NEW RESIDENTIAL	00000392
BEARDEN				CASH & CARRY	00000351
BEASLEY				CASH & CARRY	00000450
BEDFORD PINES		205-459-5161		CASH & CARRY	00000431
BELL CONSTRUCTION CO. INC.	205-553-1753	205-361-0807		CASH & CARRY	00000010
BELL RENTAL, FRANK	205-553-2015			REMODELING	00000011
BENTON, JOHNATHAN	205-752-2951	205-239-9576		REMODELING	00000079
BIGHAM CONSTRUCTION COMPANY	205-759-1563			CASH & CARRY	00000425
BUTLER REAL ESTATE	205-334-0000	205-556-7774		REMODELING	00000024
BURROUGHS CONST. CO., INC.	205-886-0116	205-799-2253		NEW RESIDENTIAL	00000026

Figure: Select customer screen

Highlight a customer record and click the select button.

Other Fields

Reference

This information is set up in *Utilities>System Options>Schedule Pro>Schedule Pro>Reference Prompt* or type in the desired information.

Salesperson

If information is from an order, this will be filled in or Use the **F8** key for the list to choose a salesperson.

Phase/Tract/Block/Lot

If information is from an order which has this information, this will be filled in or the information may be typed in. Orders may be searched and filtered based on this information from the RFMS Order Section.

Deduct # of Crews

This is only visible when Schedule Pro is set to **Manually Enter Number of Crews to Deduct** in system options.

Job Number (Definable field name)

If information is from an order which has this information, this will be filled in or the information may be typed in.




Ship to Information


If information is from an order which has this information, this will be filled in or the information may be typed in.

Telephone Numbers

If information is from an order which has this information, this will be filled in or the information may be typed in.

Job Lines

										
	RFMS Line # Temp Line #	DC	PC	Job Type	Style	Color	Description	Qty	Units	Line Status
	2		81	CARPET INSTALLATIO	PRIVATE CA			50.00	SF	NONE

- If scheduling by RFMS Original or RFMS Claim, lines on the selected order are listed in this area.
 - Tag the line items to schedule using the **Tag** buttons (click a line and then click the **Tag** button or left click next to the line). The only field that can be edited for a RFMS Order Line is the quantity.
 - A temporary line may also be inserted. A temporary line is used by Schedule Pro to calculate crew and installation depot capacities but is not related to a customer order in Order Entry. For each Temporary line added enter a Job Type, Style, Color and Quantity. Temporary lines will have a line number starting with T. Temporary lines are automatically tagged and automatically have a deduct capacity status.
-  Lines on a customer order that have already been scheduled (either completely or partially) display this icon in the left column. This feature is useful if customer order lines are scheduled at different stages as the job progresses.
- Line Items can be scheduled more than once to split the quantity between different crews. To schedule a partial quantity just change the amount in the quantity column. The next time this RFMS Order is selected for scheduling the quantity will reflect only the amount left to be scheduled.

- If scheduling by Customer Name, then temporary lines will need to be added in order to schedule the job. At a later date the job can be edited. An RFMS Order with line items can be associated to the job and then the temporary line items can be deleted if desired.
- Lines that display: All statuses except for Job Costed. Unless *Allow RFMS Job Costed Line Items to be Scheduled* is checked on the General Tab in the System Settings then job costed lines will also be available for scheduling.

Select Dates and Times

SELECT DATES & TIMES	
# Of Days	1
Start Date	06/14/13
End Date	06/14/13
Start Time	8:00 AM
End Time	5:00 PM
Time Slot	MIXED
Skip Sat	<input type="checkbox"/>
Skip Sun	<input type="checkbox"/>
Skip When Off	<input type="checkbox"/>
Distribute Evenly	
Stop	

Date	%
06/14/13	100.00%

SELECTING DATES OR DISTRIBUTING INSTALLATION ON THIS SCREEN ONLY WORKS FOR NEW JOBS. Once a job is added to the schedule, dates or distributions on this screen will not take effect, click the **Edit** button or double click to change the highlighted job.

of Days

Enter a number or use the up/down arrows to increment the number.

Start and End Date

These fields work concurrently with the Calendar and are always synchronized. For a multiple day job, the percentage to be installed for each day can be edited. Initially, the installation is evenly distributed over the number of days set but can be customized to fit the job. If set in *Utilities>System Options>Schedule Pro>Order Entry>Base Schedule Pro Install Date....* and the estimated delivery date is included in order entry the start date will be pulled from the estimated delivery date from the order header. If not start date will default to today's date.

The end date cannot be manually entered; it is calculated by the number of days and whether or not skip days are included.

Time Slot

Use the **F8** key to choose the time slot. These choices are set in [Set Up>Job Time Slots](#). If this is included in order entry the information will be pulled from the order header. Also if this is changed in schedule pro, it will update the order header. There is a **system option** setting to choose between using the **Job Time Slot Start & End Times** or the **First Job Line Start & End Times**.

Start and End Time

Although these can be edited to be different from the time slot, this is not recommended. The start and end times are not used for determining crew or depot availability.

The specific start & end times are only stored on the lines. This is used to fine tune the jobs if needed to have different specific times for all or some lines. If the times on the lines have to be changed to something other than the header "time slot" times, you CAN have the "first job line start & end times show on the grid by choosing this selection on the grid. You can also show

"First job line start & end times" in the list of jobs that appears on the Schedule New Jobs screen by setting system options.

However, because many reports and other screens use the time slot description from the header, it is recommended to approximate the times of the job as best as possible using the time slots provided.

Skip Sat/Sun/When Crew Off

These check boxes will default from system options. To schedule on one of these days, uncheck them for the system to actually schedule on those jobs. For example a crew may not normally work on a Saturday, but will for this job.

Distribution

Click the **Distribute Evenly** button to spread the installation evenly for each day of the job. This only applies to jobs that are scheduled for multiple days and only when scheduling a NEW job. The daily distribution amounts can be changed as needed but must always equal 100%.

Stop

10 Characters available. Some clients use this for routing jobs. Several jobs may be scheduled for the AM slot then prioritized by location or importance using the stop field. Stop can also be seen & edited on the quick schedule screen for routing / dispatching purposes

Stop Available on these reports:

- Daily Schedule by Date (Portrait)
- Daily Schedule by Date & Time (Portrait)
- Daily Schedule by Crew (Portrait)
- Daily Schedule by Order (Portrait)
- Jobs Edited

Select Tracking Information

SELECT TRACKING INFO	Job Status	CONTNUED	F8	
	UD TRACKING TABLE 1 DESCRIPTIO		F8	
	UD TRACKING TABLE 2 DESCRIPTIO		F8	
	Scheduled By		F8	
UD Field 1		<input type="radio"/> uc1	<input type="radio"/> uc2	<input checked="" type="radio"/> uc3
UD Field 2		<input type="radio"/> u21	<input type="radio"/> u22	<input checked="" type="radio"/> u23

Use the F8 key to access the drop down listing for these fields

Job Status

These options are set up in [Set Up>Job Status](#).

Tracking Table 1/2

This field allows assigning a tracking category to this job. Press **F8** to access the tracking data listing. The tracking fields are used to categorize installations. This user defined information is set up in [Set Up>Tracking Table1 & 2](#)

Scheduled By

This is a required field. Can be automatically entered if so set in *Utilities>System Options>Schedule Pro>Default Values* otherwise either type the appropriate name or choose it using the **F8** button. For a person to be included in the pick list, they must be checked as a Scheduler in RFMS Human Resources.

User Defined 1 & 2

This information is set in [Set Up>System Settings>Fields & Report Set Up](#). If used, select the appropriate radio button for this job.

Select Crew

This is where a crew is selected for the job. By default, the No Crew box is checked. The ability to schedule a job without picking a crew is user defined in [>Utilities>System Options>Schedule Pro >Scheduling>Warning Messages>Crew Required](#). This feature is useful when scheduling days or weeks ahead to save the date but crews are not assigned until right before the job is to start. However, to select a crew while scheduling the job, click the **F8** button to access the crew listing screen.

The columns on the select crew screen are adjustable, so that more of a particular column may be viewed. Once adjusted, this setting will remain until manually changed. Adjust by hovering over the column divider until the double arrows appear, then right click and hold, moved to the desired width, and then release the mouse button.

Crew Name	Crew Descr	Crew Nickname	Crew City	Telephone 1	Depot Name	Sun	Mon	Tue	Wed	Thr	Fri	Sat
BOOTH, J	GENERAL	JAMES-STEVE	COKER	205-339-0104	IN HOUSE		✓		✓	✓	✓	0
EVANS, T	GENERAL	TONY-JUSTIN	NORTHPORT	000-339-6055	IN HOUSE			✓	✓	✓	✓	0



When all the information is entered for the job, click this button to add the job to the schedule. The software will automatically analyze to see if there are any potential capacity conflicts and display a warning if there are. If the job is added to the schedule the calendar capacities will automatically be refreshed.

Jobs Scheduled for Selected Depot and Day

Order # / Ref	Crew Name	Start Time	End Time	Primary City	ss	Start Date	End Date	Store
USER DEFINED	EVANS, TONY	8:00 AM	12:00 PM	CARPET INS		06/10/13	06/11/13	**
CG302616	EVANS, TONY	1:00 PM	5:00 PM	NO PRIMARY		06/10/13	06/10/13	"1"

This area shows the jobs scheduled for the selected calendar date and current installation depot. This list will show jobs scheduled from all stores using this installation depot. The sort order of the jobs can be changed by clicking on the various tabs.

Edit or Delete

In addition to this quick overview, jobs can be edited by double-clicking on the scheduled job or deleted by highlighting the scheduled job and clicking the **delete** button. If a job is edited, the calendar will reflect those changes after returning from the **Edit Job** screen.

DRAG & DROP to Change Installation Date

If enabled on this workstation, it's easy to move a job from one date to another from this screen. Drag and drop a job from the Jobs Scheduled list to another date on the current calendar view.

No matter which date is grabbed in the original line, for example day two of the job, the new day it is dropped on will be the new start date.

For dates not on the current calendar view, use the **Yellow Folder** as a "holding bin" to move a job to a date that is not shown on the current calendar view.

1. Click the job to be re-scheduled in the **Jobs Scheduled** list. While holding down the left mouse button, DRAG the cursor onto the **Yellow Folder**. Release the mouse button.





2. The job information is now transferred and can be viewed in the Yellow Folder.
3. Move the calendar forward or back using the arrows until the desired installation date is in view on the calendar.
4. Click the job information in the **Yellow Folder**. While holding down the left mouse button, DRAG the cursor to the new desired installation date on the calendar.
5. Release the mouse button. The job is now moved to the new installation date.


Quick Schedule

Schedule Pro>File>Quick Schedule

Jobs listed here are determined first by the default settings in System Options>Schedule Pro with the category Default Filters.

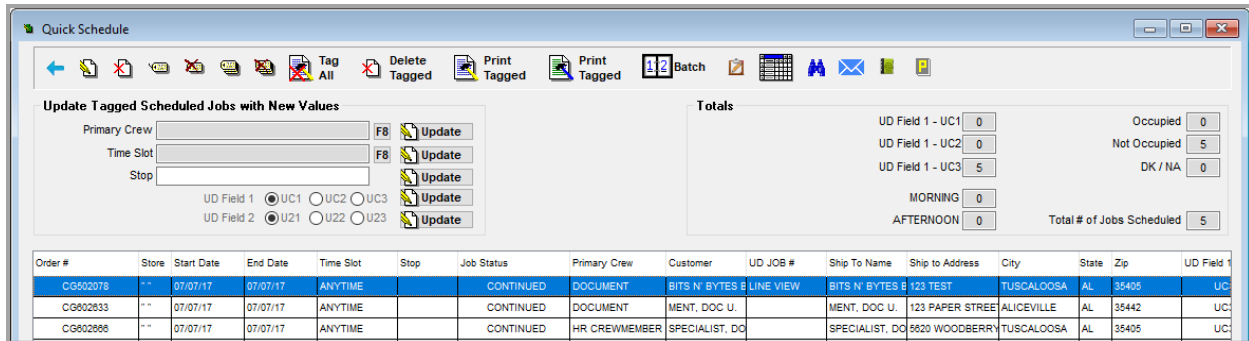
Use the find button to locate other jobs. To go back to the default settings while still in the

screen, use the reset button . The clear filter button  will set the find to include all records. The remark type was added to the options for finding scheduled jobs in, Scheduled Jobs, Quick Schedule, Quick Edit, Weekly Grid and Create Providers. Only scheduled jobs with the selected remark type will be found. Remarks can be added to scheduled jobs in Client

Management or via the Client Management Remote Actions Button  while in Schedule Pro. (Version 11.1)

The Quick Schedule screen allows viewing all jobs for a single day as well as:

- Adding jobs to the schedule from Order Entry based on the Estimated Delivery Date in the order header. See Batch Scheduling from Order Entry
- Viewing scheduled job Entry totals for a selected day for each job type.
- Editing multiple jobs simultaneously to: assign or change crews, assign or change time slots or stop numbers, or change the values for "User Defined 1 or 2."
- Deleting multiple jobs from the schedule simultaneously.
- Updating Scheduled jobs directly from Order Entry.
- Batch printing RFMS Work Orders for a day's scheduled jobs



When the Quick Schedule screen is first opened, it will show all jobs scheduled for today's date. Use the **Find** Function to narrow the jobs to view. All the jobs that meet the filter criteria will be listed in the browse below. Use the tabs at the top of the browse list to sort and search the list.

The grey box at the top left of the screen will display the Total Number of those Jobs Scheduled that meet the criteria listed and a few other totals, such as the User Defined 1 Values and the count of jobs that are scheduled for each of the two **Primary Time Slots**, as defined in *Utilities>System Options>Schedule Pro>Scheduling> Quick Schedule Display Time Slot Totals 1 and Quick Schedule Display Time Slot Totals 2.*

Many of the column widths in this browse list are adjustable.

Batch Scheduling from Order Entry



This feature allows importing ALL jobs from Order Entry that have the selected Estimated Delivery Date, usually today or the next working day. To use this feature, the Estimated Delivery Date must be entered in the order header in Order Entry. This date will become the scheduled date.

To add one more step on the Order Entry side to be sure that only jobs that are ready to be scheduled are added, Train Order Entry people to mark a job "To Be Scheduled" using the **Schedule Pro** button in Order Entry when it is ready to go. Then on the Schedule Pro import, select only jobs that have the desired Estimated Delivery Date AND are marked with the To Be Scheduled Alert rather than adding all jobs with the correct Estimated Delivery Date.



Notes:

The Estimated Delivery Date field can be renamed in System Options. If there is no field named Estimated Delivery Date in the order header, go to System Options and find out what the field has been renamed.

Before starting to batch schedule, check *Utilities>Schedule Pro>Order Entry>Automatically Tag the Order Lines* to be sure that it is set to "All Lines" or "Deduct Capacity Lines Only" so the system will know which lines to add to the job when it automatically adds it to the schedule.

Click the **batch schedule** button, and the following screen will appear:

Select a Store Code and a Depot Name from the **F8** lists. Be sure the Scheduled By field has a user name. If using the To Be Scheduled Alerts safeguard described above, check the box labeled Order Entry 'To Be Scheduled' Alerted Orders Only. Then Click "Schedule" to add the jobs.



Notes:

- Only RFMS Original Orders and those for the selected store will be scheduled.
- The routine will not check the Scheduling Warning Messages as set in system options

The following fields will be set based on defaults set in *Utilities>System Options>Schedule Pro>General Category Prompts:*

- Tracking Table 1 Description
- Tracking Table 2 Description
- User Defined Field 1
- User Defined Field 2
- Job Status
- Deduct Number of Crews (If Enabled)
- Scheduled By
- Job Time Slot:

Utilities>System Options>Schedule Pro>General

- Primary Time Slot 1 if 'AM INSTALL' entered in Custom Work Order Note
- Primary Time Slot 2 if 'PM INSTALL' entered in Custom Work Order Note
- Time Slot ID = 1 if no appropriate Custom Work Order Note



Notes:

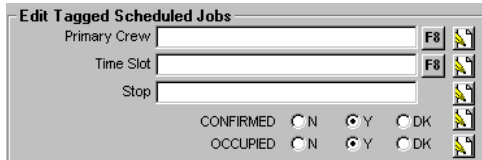
Any "To Be Scheduled" Alerts for these jobs will be deleted. Next edit the jobs by assigning crews, time slots and/or stops.

Edit Scheduled Jobs

Whether jobs were added to the schedule using the batch scheduling or scheduled one at a time in the regular Schedule New Jobs screen, they can be viewed, updated, and changed in the Quick Schedule screen.

To assign a crew to multiple jobs for that day, tag the jobs to assign, and then select the crew from the Edit Primary Crew **F8** button in the box surrounded by a teal border. (NOTE: If some of the tagged jobs do not belong to the same Installation Depot as the new Crew an error

message will be displayed and those jobs will not be changed.) Then click the **Change Primary Crew** button.



To change the Time Slot and/or Stop values for these or other tagged records, follow the same procedure until all jobs are assigned and scheduled.

The values can also be changed for the User Defined 1 and 2 fields. For instance, using User Defined 1 to note whether a job has been confirmed and all jobs for the day are set to "N" for that field, tag all the jobs for that day that have been confirmed, then select "Y" for that field in



the blue box, and click the **edit** button.

Deleting Jobs

To delete an individual job, highlight the job in the browse box, then click the **delete** button. A confirmation box will appear. There is no need to tag the record for a single delete.

If a group of jobs on a certain day have been added to the schedule in error, tag all of them on this screen, then click the button labeled **Delete Tagged Scheduled Jobs**. Again, a confirmation box will appear.

WARNING: Use this feature carefully as there is no "undo" option for these deletes!

Update Scheduled Jobs from Order Entry



WARNING: If not using the Batch Scheduling, this update feature may not be useful!

If all lines for a lot are added into one order in Order Entry, then schedule multiple separate jobs in the Schedule Pro by job type, using the Update Scheduled Jobs feature is not recommended. Instead, use the Order Entry Alerts to update scheduled jobs to reflect changes that have been made in Order Entry rather than using this automated feature. To see why, read on.

This feature essentially auto-updates all jobs that have Order Entry Alerts. Once a day is selected, click the button labeled **Update Scheduled Jobs from Order Entry** to change ALL scheduled jobs for that day to make the jobs match the order file as follows:

Line Added: If *Utilities>Schedule Pro>Order Entry>Automatically Tag the Order Lines* is set to "Deduct Capacity Lines Only," the Automatic Update will add any Deduct Capacity lines to the job that are not currently there. If that setting is set to "All Lines," all lines that are in the order and not in the scheduled job will be added. This update would only be desirable if all of an order is routinely scheduled in one job.

- Line Deleted: All lines that have been deleted from the order since the job was added to the schedule will be deleted from the schedule.
- Line Edited / Line Qty Edited: Any Product, Color, or Quantity information that has been changed for a line in the order will be changed accordingly in the schedule.

- Order Voided: If an order was voided in Order Entry, it will be deleted from the schedule.
- Once the update is complete, the Order Entry Alerts will be deleted for these jobs.



Notes:


This button does update ALL jobs for the day – tagging is irrelevant for this feature.

View Daily Totals



Clicking this button shows the daily number and quantity total for each job type as defined in Utilities>Set Up>Job Types. Each job type's amounts are showed in the unit of measure that is selected in the Job Types screen. Carpet will be displayed either by the SF or by SY, depending the selection in Job Types, and Hardwood will be displayed by SF, and so on.

If using batch scheduling for adding jobs for this day, the Daily Totals screen is a good way to check the total amounts scheduled against installation capacities for the business.

DAILY TOTALS			
 Store: ALL Depot: ALL Date: 12/14/09			
Job Type	Total Jobs	Total Qty	Units
CARPET	2	226.00	SF
WOOD	0	0.00	SF
VINYL	0	0.00	SF
VCT	0	0.00	SF
LAMINATES	0	0.00	SF
CERAMIC	0	0.00	SF
TAKE UP CARPET	0	0.00	SF
TAKE UP WOOD	0	0.00	SF
TAKE UP VINYL	0	0.00	SF
SPECIAL SERVICES	0	0.00	EA
UNDERLAYMENT	0	0.00	SF



Notes:

This button shows ALL jobs for the day – tagging is irrelevant for this feature.

Batch Print Work Orders

Use this to print multiple RFMS Custom Work Orders or Schedule Pro Work Tickets for a selected day.

In the Quick Schedule screen, tag all records, or just tag the jobs for which to print work orders. If some of the day's work orders have been printed and now wish to print the rest, tag the remaining jobs by clicking the button labeled **Tag All Jobs with No WO Printed**, then click the **print** button to print the remaining orders.

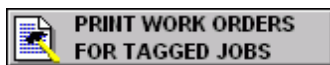


If a RFMS Custom Work Order or a Schedule Pro Work Ticket is printed for a job through the Quick Schedule screen, a work order icon will appear in the browse box next to the order number.

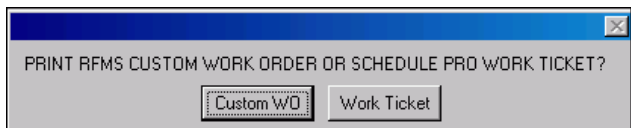
Order #
CG011250
CG014335
CG015647
CG912621
CG921418
CG922683
CG925640

The Custom RFMS Work Orders will not print temporary lines that have been added in the scheduled job but not added in the Order Entry module. To print a simple work ticket for that type of job, do so in the [View Schedules](#) screen.

To display print options check the **display print options** box, to save a step deselect this box. Click the **Print Work Orders for Tagged Records** button.



Choose whether to print an RFMS Custom Work Order or the Schedule Pro 'Work Ticket' will print.



Access the RFMS Interoffice Mail system to send a message about the highlighted job, send a generic email or an email using a template built in the CMM program.



Accesses the Client Management Remote Actions Screen for the highlighted order





View the PDF history screen.

Quick Edit

Schedule Pro>File>Quick Edit

This screen allows quick editing of previously scheduled orders. For example go to this screen at the end of the day and tag all the jobs with completed work orders and change the status of them all at once. Another example is removing all jobs from one crew.

Jobs listed here are determined first by the default settings in *>Utilities>System Options>Schedule Pro>General>Category: Default Filters*. Use the find button to locate other

jobs. To go back to the default settings while still in the screen, use the reset button.  The clear filter button  will set the find to include all records.

RFMS Schedule Pro for DEMONSTRATION COMPANY - [Quick Edit for Scheduled Jobs]

File Edit Utilities Window Help Navigator Mail

Create Provider Records for Tagged Jobs

Edt Tagged Scheduled Jobs

New Primary Crew: [F8] Change Primary Crew New TRACKING TABLE A: [F8] Change TRACKING TABLE A
 New Warehouse Prep: [F8] Change Warehouse Prep New TRACKING TABLE B: [F8] Change TRACKING TABLE B
 New Follow Up Employee: [F8] Change Follow Up New Job Status: [Change Job Status]

RFMS Order # Customer Job Scheduled Start Date JOB Info Ship To Name Ship To Address Ship To City FILTER INACTIVE

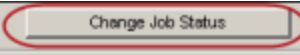
Search Order Number

Order # / Store Dept	Start Date / End Date	Customer Name / Ship To Name	Ship To Address / Ship To City	Primary Crew Name	Warehouse Prep	Follow Up Employee	TRACKING TABLE A	TRACKING TABLE B	Job Status	JOB Info
IN HOUSE	03/17/06	MEDDERS, ROY	228 MEDDERS ROAD	CARVALHO, JON					IN PROGRESS	228 MEDDERS ROAD
IN HOUSE	03/21/06	PERKINS/TONY LESTER	105 RIDGEHAVEN TUSCALOOSA	HAYNES, CHRISTOPHER			CERAMIC REPAIR			105 RIDGEHAVEN
IN HOUSE	03/22/06	HOLLYHAND/BUSBY	3513 HORSE BEND NORTHPORT	CARVALHO, JON			CERAMIC REPAIR		IN PROGRESS	77 SHIRLEY FARMS
IN HOUSE	03/22/06	HOLLYHAND/BUSBY	3513 HORSE BEND NORTHPORT						IN PROGRESS	77 SHIRLEY FARMS
IN HOUSE	03/27/06	KEYS, NATHANIEL	1531 HILLVIEW RD	CARVALHO, JON			CERAMIC REPAIR		IN PROGRESS	
IN HOUSE	03/27/06	NATHANIEL KEYS	COCKER							
IN HOUSE	03/28/06	CRAWFORD, JEAN		CORBELL, SHANNON			CERAMIC REPAIR			
IN HOUSE	03/29/06	JEAN CRAWFORD								
IN HOUSE	03/27/06	NOWACK, STEFFAN	2153 INVERNESS PLACE TUSCALOOSA	CORBELL, SHANNON			CERAMIC REPAIR			
IN HOUSE	03/27/06	STEFFAN NOWACK								
IN HOUSE	03/29/06	PERKINS/LESTER	2002 HARRISON DRIVE TUSCALOOSA	CORBELL, SHANNON			CERAMIC REPAIR			105 RIDGEHAVEN
IN HOUSE	03/29/06	TONY LESTER								
IN HOUSE	03/29/06	HELMES/RYRD	15123 MARINA ROAD NORTHPORT	BOOTH, JAMES			CERAMIC REPAIR			15123 MARINA RD
IN HOUSE	03/29/06	HELMES/RYRD								
IN HOUSE	04/04/06	LEWELLYN, SCOTT	3216 3RD STREET TUSCALOOSA	WATTERS, JOSHUA			CERAMIC REPAIR			NEEDS TO GO AT 12:00PM
IN HOUSE	04/04/06	SCOTT LEWELLYN								
IN HOUSE	04/07/06	PERKINS CONSTRUCTION	104 RIDGEHAVEN TUSCALOOSA	EVANS, TONY			CERAMIC REPAIR		IN PROGRESS	104 RIDGEHAVEN
IN HOUSE	04/07/06	PERKINS CONSTRUCTION								
IN HOUSE	04/07/06	GLADNEY BOB & BARBARA	3600 KENNEBEC NORTHPORT				CERAMIC REPAIR		IN PROGRESS	600 KENNEBEC
IN HOUSE	04/07/06	BOB AND BARBARA								
IN HOUSE	04/12/06	ADAMS, JACQUELINE	5012 3RD AVENUE TUSCALOOSA	EVANS, TONY			CERAMIC REPAIR			5012 3RD AVENUE
IN HOUSE	04/12/06	JACQUELINE ADAM								
IN HOUSE	04/17/06	MOUCHETTE, ROLAND	7001 UNITY ROAD TUSCALOOSA	CORBELL, SHANNON			NEW INSTALLATION			7001 UNITY ROAD
IN HOUSE	04/17/06	ROLAND MOUCHE								
IN HOUSE	04/21/06	BLACK, SIDNEY	5052 NORTHCLIFF NORTHPORT				CERAMIC REPAIR		IN PROGRESS	5052 NORTHCLIFF DRIVE
IN HOUSE	04/21/06	SIDNEY BLACK								
IN HOUSE	04/21/06	PROBUILT CONSTR	178 FOREST GLEN NORTHPORT				CERAMIC REPAIR		IN PROGRESS	178 FOREST GLEN
IN HOUSE	04/21/06	PROBUILT CONSTR								
IN HOUSE	04/21/06	RED, BILL & DIANE	105 WINDY RIDGE TUSCALOOSA				CERAMIC REPAIR		IN PROGRESS	105 WINDY RIDGE, TUSC., AL 3540
IN HOUSE	04/21/06	BILL & DIANE RED								
IN HOUSE	04/21/06	COOPER, BILL	1036 VINEYARDS DRIVE TUSCALOOSA	SCOTT, BEN			CERAMIC REPAIR		IN PROGRESS	1036 VINEYARDS DRIVE
IN HOUSE	04/21/06	BILL COOPER								

First use the filters at the top of the screen to narrow the scheduled jobs list. Next use the tabs to change the sort order and further search.

Tag the jobs to change.

Click the **F8** or down arrow button to the right of the field(s) to edit select the new values AND click the **Change** button.

New Job Status: **COMPLETED** 

Status: **COMPLETED**

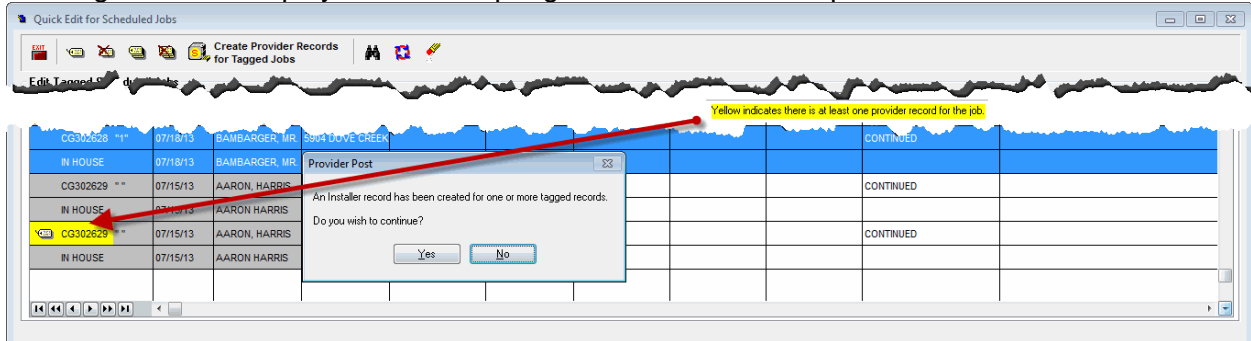
Primary Crew Name: EVANS, TONY

TRACKING TABLE A: [] TRACKING TABLE B: []

Create Provider Records for Tagged Jobs



A group of jobs can also be tagged to create provider records for them from this screen. This might be done from this screen after the status is changed for completed jobs daily. Once at least one provider record is created for a job, the invoice number is highlighted in yellow. A message will also display when attempting to add an additional provider record.



Daily Schedule Grid

Schedule Pro > File > Daily Schedule Grid

This grid shows scheduled jobs for one day at a time

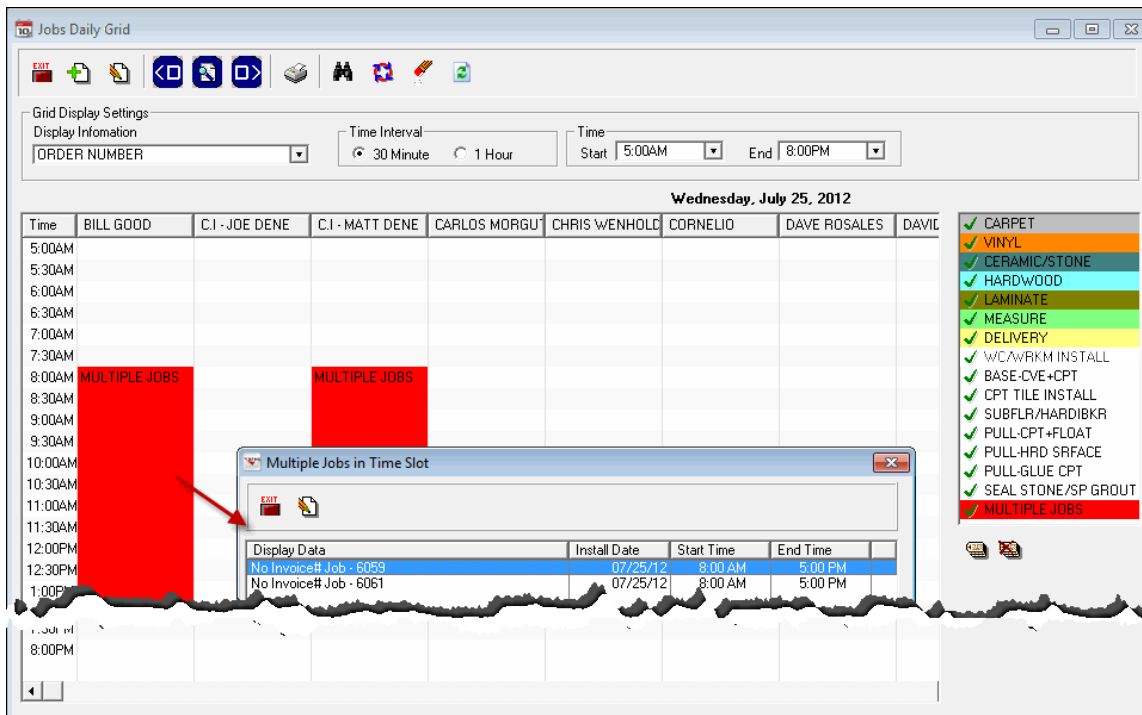


Figure: Jobs Daily Grid

Toolbar



Exit the **Daily Schedule Grid**.



Brings up the **Schedule New Job** screen.

Select to use the full or simple screen in Schedule >*Utilities>System Options>Schedule Pro>Scheduling Grid>Select Grid to Display*



Edit the selected job.



Move back one day.



Search for a specific day.



Move one day forward.



Show Detailed Crew Information for the selected job.



Print Daily Job Schedule Reports. Simple or Detailed.



Use the find feature to find specific jobs or a specific crew.



Click the reset button to set the find back to default options as set in *Utilities>System Options>Schedule Pro> Category Default Filter Settings*.



Clear the find so all options are included.




Refreshes the grid to include recent changes.

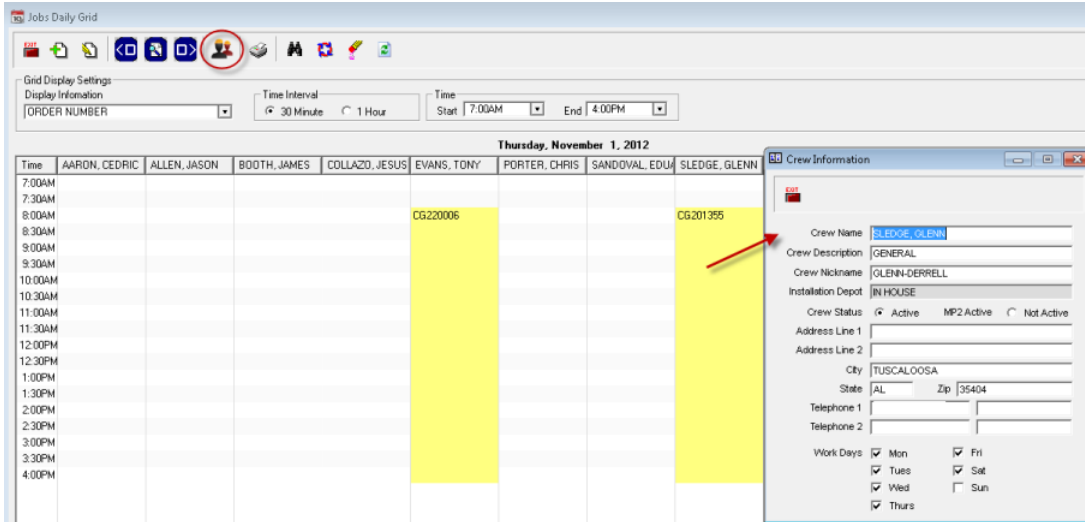
Multiple Jobs

If multiple jobs are scheduled for the same time, the words multiple jobs will show on the display. Clicking the block will pop up a listing of the jobs. The multiple Jobs type must be checked for these to show. Because the daily grid is designed to be sorted by job (material) type if more than one type is scheduled for the same job, then that job will show as multiple jobs. The job type is displayed in the pop up window.

Show Detailed Crew Information for the selected job

A button has been added to show the Crew Information on the Daily Grid. Click on a job to

select it, click on the Show Crew Information Button.  The Crew Information screen for the crew on the selected job will pop up.



Reports



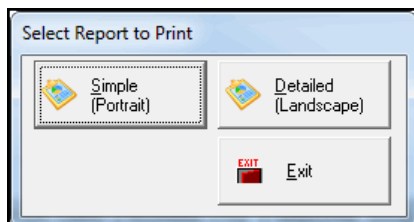
Click the Printer button.
Two reports are available from the Daily Schedule Grid.

Daily Job Schedule Report						STORE: ALL STORES
						DEPOT: ALL DEPOTS
						CREW: ALL CREWS
						JOB TYPE: ALL JOB TYPES
						CUSTOMER: ALL CUSTOMERS
						SALESPERSON: ALL SALESPERSONS
						JOB STATUS: ALL
Display	Material Type	Begin	End	Customer Name	Phone#	
Crew Name: EVANS, TONY						
CG201341	CARPET	8:00 AM	5:00 PM	GORDON APLIN	205-554-1592	
CG201341	CARPET	8:00 AM	5:00 PM	GORDON APLIN	205-554-1592	
Crew Name: SLEDGE, GLENN						
CG201342	CARPET	8:00 AM	5:00 PM	CONNIE BUTLER	205-310-1083	
CG201342	CARPET	8:00 AM	5:00 PM	CONNIE BUTLER	205-310-1083	

Figure: Simple Daily Job Schedule Report.

Report Options

Click the printer button to access the report options.



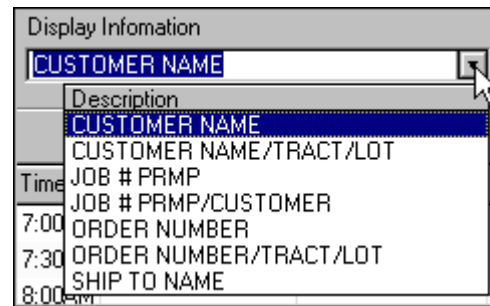
The simple report is a one line per job listing. The detailed report is the same as the Daily Schedule Landscape Report from the reports menu.

Grid Display Settings

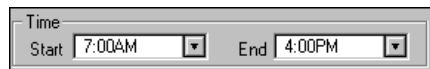
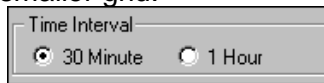
The grid can show one line of information about scheduled jobs, choose this using the drop down list under **Display Information**.

The choices are:

- Customer Name
- Customer Name/Tract/Lot
- Job # Prompt
- Job # Prompt/Customer
- Order Number
- Order Number/Tract/Lot
- Ship to Name



Next choose whether the grid will be divided into 30 minute or 1 hour intervals but selecting the desired option. 30 minute will give a more detailed time breakdown, but 1 hour will show a smaller grid.



Set a start and end time for the grid.

On the right hand side of the grid, choose the job types which will be displayed by checking or un-checking them in the list. To include just a few job types, untag all and then choose those types.

If a single job type will always be viewed, go to [Utilities>System Options>Scheduling Grid>Primary Daily Grid Job Type](#) and select that job type as the Primary Daily Grid Job Type.

Doing so will enable a button on the screen with that job type as the name. Clicking the button will deselect all other job types, leaving the primary job type as the only one to be displayed.

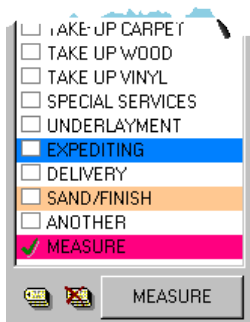


Figure: Daily Grid Job Type Options

Weekly Grid

Schedule Pro>File>Weekly Grid

This screen allows viewing scheduled jobs in a grid format for one week at a glance. It is also possible to drag & drop to move jobs around with ease.

Jobs with no crew assigned will be listed at the top of each grid. Depending on the amount of data, scroll bars may be needed to see all the information.

The Grid has two views: Simple or Detailed.

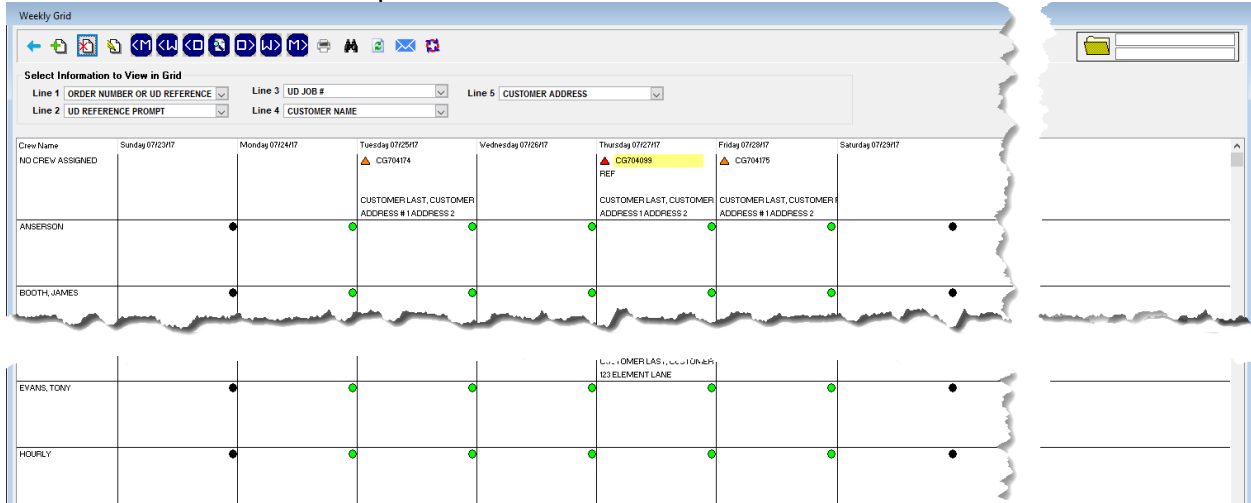


Figure: Detailed Grid

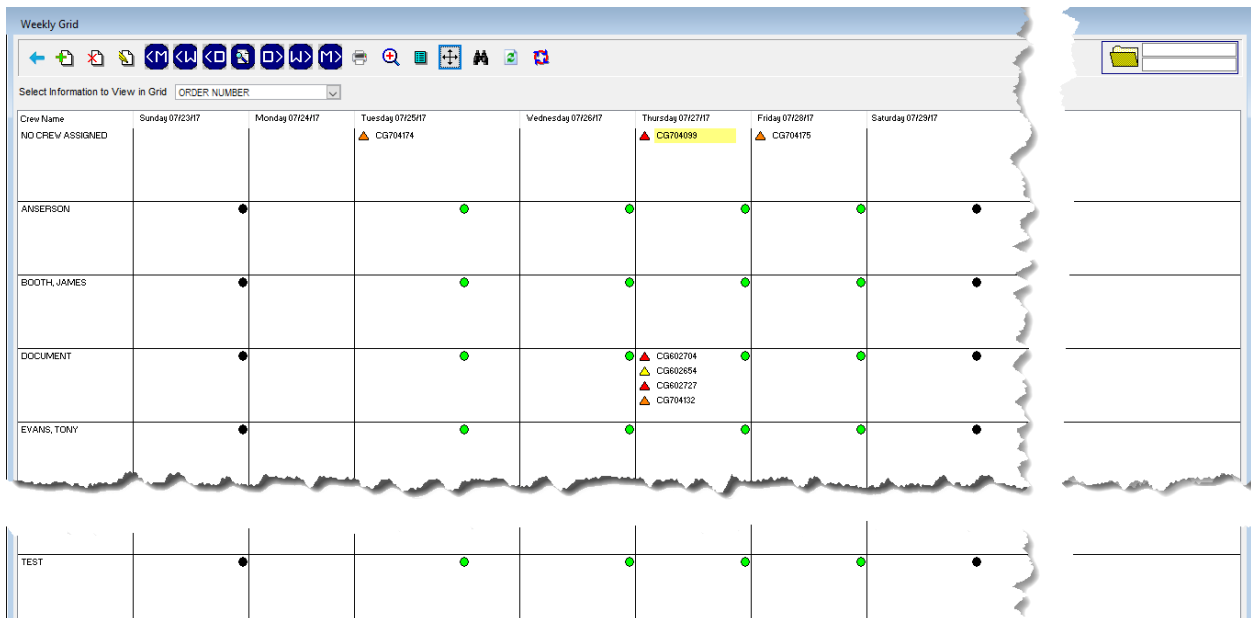









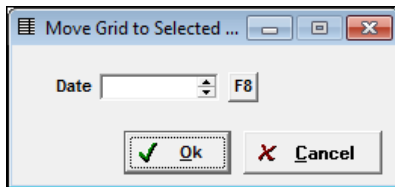
Figure: Simple Grid

Jobs with no crew assigned will be listed at the top of each grid. Depending on the amount of data, scroll bars may be needed to see all the information.

Changing to a Different Time Frame



The buttons at the top of the screen allow moving forward and backward to view different dates or to move a job from one day to another.

BUTTON	DISPLAYS
	Previous Month
	Previous Week
	Previous Day
	Next Month
	Next Week
	Next Day
	Search for Specific Day



Here, as with all date fields in RFMS, hit the D key to fill in today's date, type in a date, use the up and down arrows to move the date on day at a time or click F8 to bring up the calendar and then click the go to date button or hit enter. The grid will display with the date entered first.

Filtering Records for a More Streamlined Search

1. The default user grid setting can be set in Jobs listed here are determined first by the default settings in *>Utilities>Schedule Pro>General>Category: Default Filters*. For example a User could default to seeing only jobs from their default store.
2. Use the Find button  to narrow the jobs shown from the user defaults. If filter is applied, the grid view will only include the records meeting those criteria.  The button will turn blue if a find is applied. For example, the user may want to temporarily narrow the view to see only jobs in the morning time slot.

All filter options on this screen can be used by themselves or as a combination. They give powerful methods of working with and searching for scheduled jobs. To include all records within a specific category, leave the field blank. Otherwise, click the **F8** button to select a specific filter from the corresponding list.

If filtering by Job Type, only line items for the specific material will display. If a job does not have any lines of that material, the job will not display at all. To view all store codes, clear the store code field.



Use the reset button to get back to the user defaults.



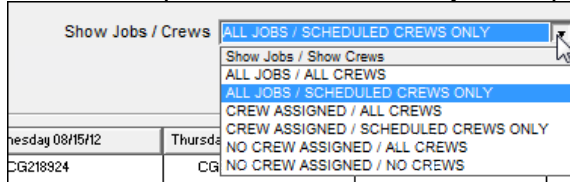
Use the clear button to clear even the user defaults and show all scheduled jobs.



Use the refresh button to include changes to jobs which have happened while viewing the screen. The screen also refreshes any time a change is made on the screen.

3. Show Jobs/Crews

Use this drop down list to limit the jobs displayed on the grid.



- a. Set the default value for this under *>Utilities>Schedule Pro>Scheduling Grid>Show Jobs / Show Crews*
 - b. All Jobs/All Crews: Includes jobs for which no crew is assigned. Includes crews to which no jobs are assigned.
 - c. All jobs/Scheduled Crews only: Includes jobs for which no crew is assigned. Excludes crews to which no jobs are assigned.
 - d. Crew Assigned/All Crews: Excludes jobs for which no crew is assigned. Includes crews to which no jobs are assigned.
 - e. Crew Assigned/Scheduled Crews only: Excludes jobs for which no crew is assigned. Excludes crews to which no jobs are assigned.
 - f. No Crew Assigned/All Crews: Only Jobs with no crew assigned. Includes crews to which no jobs are assigned.
 - g. No Crew Assigned/No Crews: Only Jobs with no crew assigned. Includes no crews.
4. Deduct Capacity Lines Only: Check this box to exclude jobs with no lines marked as deduct capacity.

Viewing Crew Information

Double click a crew name to view a crew's basic information. If the popup information is in the way, drag and move it on the screen.






The screenshot shows a 'Crew Information' dialog box with the following fields and values:

- Crew Name: BRENT SMITH
- Crew Description: (empty)
- Crew Nickname: (empty)
- Installation Depot: MY DEPOT
- Crew Status: Active, MP2 Active, Not Active
- Address Line 1: 7889 FOXFIRE ROAD
- Address Line 2: (empty)
- City: TUSCALOOSA
- State: AL, Zip: 35401
- Telephone 1: 205-897-6410
- Telephone 2: (empty)
- Work Days: Mon, Tues, Wed, Thurs, Fri, Sat, Sun






Figure: View Crew

Grid Color Coding

To the left of each job there will be a material status triangle color coded icon. They are defined as follows:

-  Red - None, Gen PO
-  Orange - On Order
-  Yellow - Reserved
-  Green - Cut, Staged, or Delivered
-  Blue - Job costed, Partial Billing

To the right of the first line for the crew/day there will be a crew status icon. This is the same icon that is displayed in the Select Crew for Job screen which displays the crew capacity for the day using the dot color coded icons. These icons are defined as follows:

-  Red - 100% booked or overbooked
-  Orange - 76% to 99% booked
-  Yellow - 1% to 75% booked
-  Green - 0% booked
-  Black - Crew does not work on selected day.

Printing the Grid

Either grid may be printed for the seven days shown on the screen. To do so, simply click the button at the top of the Scheduling Grid that says, **Print this Grid**. Printing landscape or legal gives blank space for notes.

PRINT BLANK SPACE TO THE RIGHT BY USING LANDSCAPE OR LANDSCAPE LEGAL.

7 DAY GRID REPORT

STORE: ALL STORES
 DEPOT: ALL DEPOTS
 CREW: ALL CREWS
 JOB TYPE: ALL JOB TYPES
 CUSTOMER: ALL CUSTOMERS
 SALESPERSON: ALL SALESPERSONS
 JOB STATUS: ALL

Crew Name	Sunday 05/09/10	Monday 05/10/10	Tuesday 05/11/10	Wednesday 05/12/10	Thursday 05/13/10	Friday 05/14/10	Saturday 05/15/10
NO CREW ASSIGNED					205-345-4272 NOFORMAT		CG90009 205-553-5644
NO CREW ASSIGNED					CG900010 205-553-5644		
SUBCONTRACTOR					CG900010 205-553-5644	CG900009 AUDIT TRACKER TE	
SUBCONTRACTOR					CG900010 205-553-5644		

Figure: Sample 7 Day Grid Report

7 DAY GRID REPORT

STORE: ALL STORES
 DEPOT: ALL DEPOTS
 CREW: ALL CREWS
 JOB TYPE: ALL JOB TYPES
 CUSTOMER: ALL CUSTOMERS
 SALESPERSON: ALL SALESPERSONS
 JOB STATUS: ALL

Crew Name	Sunday 06/19/11	Monday 06/20/11	Tuesday 06/21/11	Wednesday 06/22/11	Thursday 06/23/11	Friday 06/24/11	Saturday 06/25/11
BOOTH, JAMES	●					CG102607 NO PRIMARY QTY 119 IRBY BLVD. 2565474916	●
EVANS, TONY	●	●	CG102644 NO PRIMARY QTY 119 IRBY BLVD. 256-547-2222				●
SLEDGE, GLENN	●	CG102626 WOOD 122.5 75397 7266 PRESIDENTIAL 205-792-6038	CG102626 WOOD 122.5 75397 7266 PRESIDENTIAL 205-792-6038		CL000003 CARPET 201 GEE GORDON	CG102627 NO PRIMARY QTY 4233 2ND AVE E 205-345-4272	

Figure: Sample Full Legal

Grid Options

Click the **delete** button to remove a job and its alerts from the schedule.

Click the **edit** button to get to the [edit screen](#). Double-clicking the highlighted job will also allow editing.

Select a Date and a Crew by clicking in the corresponding box, and then hit the **insert** button to add a job. That Date & Crew will be pulled up in the Schedule New Jobs screen. Now, add the job, tag lines, choose a time slot, and hit "Add" to schedule. See [schedule new job screen](#) for more details on scheduling

Moving Jobs

To move a job to a different day in the current week:

1. Click the job with the left mouse button.
2. While holding the button down, drag the cursor to the new day.
3. Release the mouse button and the job is moved.
4. No matter which date is grabbed in the original line, for example day two of the job, the new day it is dropped on will be the new start date.

To move a job to a different week or month:

1. Click the job with the left mouse button.
2. While holding the button down, drag the cursor to the **YELLOW folder**.
3. Release the mouse button. The job information appears next to the **Yellow folder** button. The **folder** button changes to indicate the job is ready to be moved.
4. Click one of the **Navigation** buttons to move to another day, week or month.
5. When the new day is shown on the grid, click the **Yellow folder** and drag the job to the new day.
6. Release the mouse button and the job is moved.

Jobs moved into the Folder area are not moved from the schedule date until they are actually "dropped" into a new day. If this screen is exited while a job is in the Folder, it will revert back to the original date

Simple Grid Only



The simple grid only displays one line of information per job, this is a quick way change the information shown.



Clicking this button gives more detail on the highlighted job.

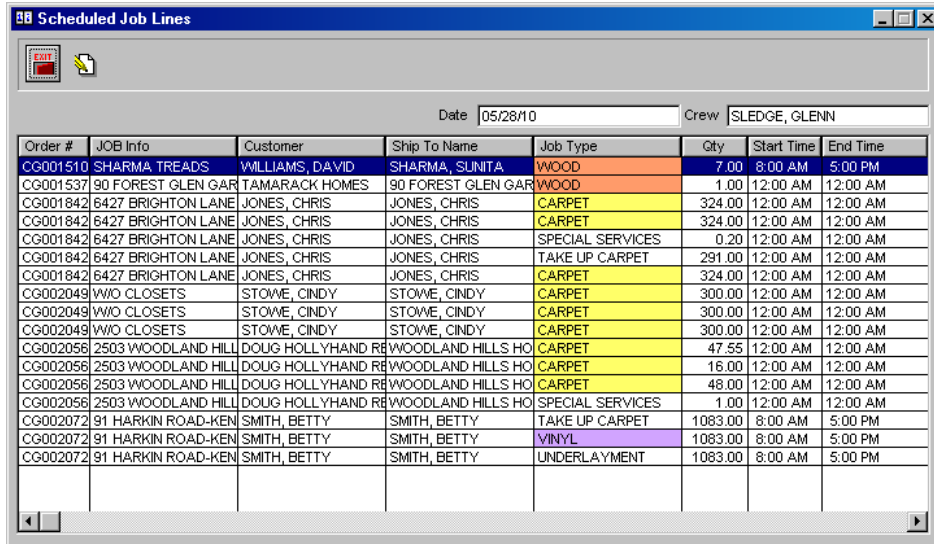
JOB INFORMATION	
RFMS Order #	CG900010
Depot Name	MY DEPOT
Primary Crew	SUBCONTRACTOR
Follow Up Employee	
Warehouse Prep	
Job Status	COMPLETED
Stop	
Track 1 Description	
TT1	
Scheduled Date	05/13/10 To 05/13/10
Time Slot	MIXED
Salesperson	NANCY REGAN
REFERENCE	
JOB NUMBER	
Customer	SMITH CONSTRUCTION
Ship To Name	SMITH CONSTRUCTION, INC.
Ship To City	TUSCALOOSA
Telephone A	205-553-5644
Telephone B	
Job Total Dollars	\$19,527.28

Figure: Job Information Screen

View All Job Lines

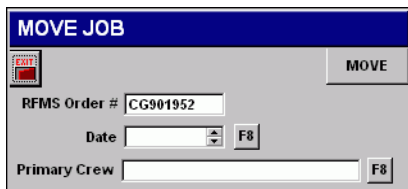
On the simple grid, the **View all job** icon indicates that there are more jobs for the crew/day than are displayed.

Clicking this button on any day shows all job lines scheduled for the same crew and day of any highlighted job.



Order #	JOB Info	Customer	Ship To Name	Job Type	Qty	Start Time	End Time
CG001510	SHARMA TREADS	WILLIAMS, DAVID	SHARMA, SUNITA	WOOD	7.00	8:00 AM	5:00 PM
CG001537	90 FOREST GLEN GAR	TAMARACK HOMES	90 FOREST GLEN GAR	WOOD	1.00	12:00 AM	12:00 AM
CG001842	6427 BRIGHTON LANE	JONES, CHRIS	JONES, CHRIS	CARPET	324.00	12:00 AM	12:00 AM
CG001842	6427 BRIGHTON LANE	JONES, CHRIS	JONES, CHRIS	CARPET	324.00	12:00 AM	12:00 AM
CG001842	6427 BRIGHTON LANE	JONES, CHRIS	JONES, CHRIS	SPECIAL SERVICES	0.20	12:00 AM	12:00 AM
CG001842	6427 BRIGHTON LANE	JONES, CHRIS	JONES, CHRIS	TAKE UP CARPET	291.00	12:00 AM	12:00 AM
CG001842	6427 BRIGHTON LANE	JONES, CHRIS	JONES, CHRIS	CARPET	324.00	12:00 AM	12:00 AM
CG002049	W/O CLOSETS	STOWE, CINDY	STOWE, CINDY	CARPET	300.00	12:00 AM	12:00 AM
CG002049	W/O CLOSETS	STOWE, CINDY	STOWE, CINDY	CARPET	300.00	12:00 AM	12:00 AM
CG002049	W/O CLOSETS	STOWE, CINDY	STOWE, CINDY	CARPET	300.00	12:00 AM	12:00 AM
CG002056	2503 WOODLAND HILL	DOUG HOLLYHAND RE	WOODLAND HILLS HO	CARPET	47.55	12:00 AM	12:00 AM
CG002056	2503 WOODLAND HILL	DOUG HOLLYHAND RE	WOODLAND HILLS HO	CARPET	16.00	12:00 AM	12:00 AM
CG002056	2503 WOODLAND HILL	DOUG HOLLYHAND RE	WOODLAND HILLS HO	CARPET	48.00	12:00 AM	12:00 AM
CG002056	2503 WOODLAND HILL	DOUG HOLLYHAND RE	WOODLAND HILLS HO	SPECIAL SERVICES	1.00	12:00 AM	12:00 AM
CG002072	91 HARKIN ROAD-KEN	SMITH, BETTY	SMITH, BETTY	TAKE UP CARPET	1083.00	8:00 AM	5:00 PM
CG002072	91 HARKIN ROAD-KEN	SMITH, BETTY	SMITH, BETTY	VINYL	1083.00	8:00 AM	5:00 PM
CG002072	91 HARKIN ROAD-KEN	SMITH, BETTY	SMITH, BETTY	UNDERLAYMENT	1083.00	8:00 AM	5:00 PM

Move Job



MOVE JOB

RFMS Order #

Date

Primary Crew

If a job is highlighted on the grid, the order number will be automatically entered; otherwise a number can be typed in. A date must be entered or use the **F8** button to access the calendar. To change the primary crew, use the **F8** button to select a new crew from the list.

Orders Ready to Schedule

Schedule Pro>File>Orders Ready to Schedule

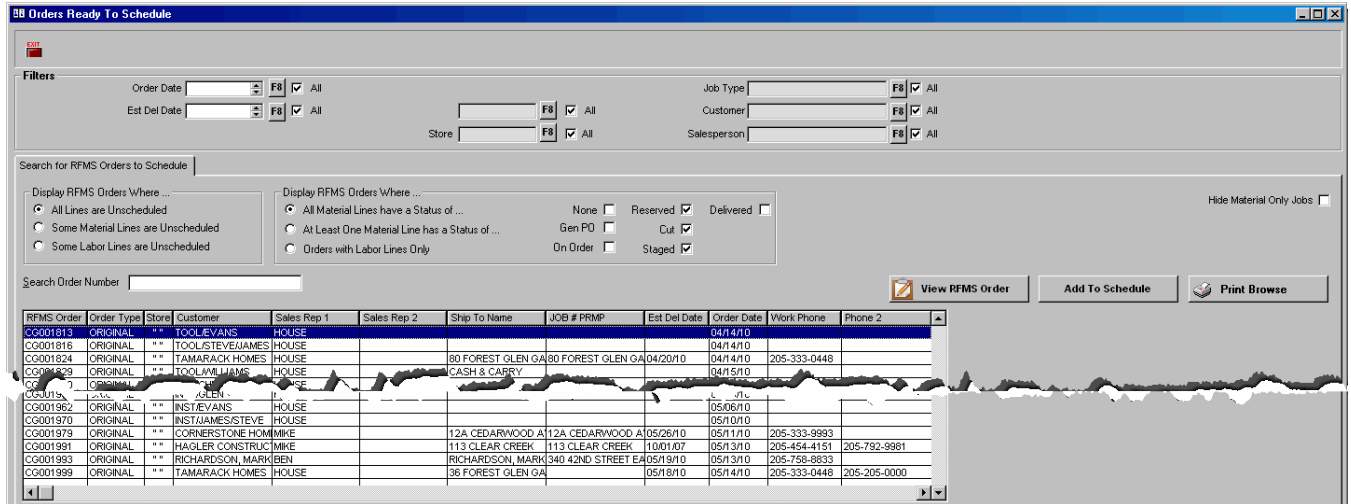


Figure: Orders Ready to Schedule Browse List

Schedule Pro has had this function for quite a while, but it was with the alerts screen. It was relocated in version 11.2 to the file menu for easier access.

These alerts represent customer orders that have NO Delivery Date or Estimated Delivery Date. It is a reference to see all jobs that have never been scheduled.

Display RFMS Orders When- choose between:

- All Lines are Unscheduled
- Some Material Lines are Unscheduled
- Some Labor Lines are Unscheduled

Display RFMS Orders when- choose between:


- All Material lines have a status of>>>
- At Least One Material Line has a status of>>>
- For these two choose any combination of statuses
- Orders with Labor Lines Only (Status does not apply)

Hide Material Only Jobs Check this if scheduling is done only via service lines.

Clicking on Add to Schedule brings up the [Schedule New Job Screen](#).

View RFMS Order  **View RFMS Order**: Clicking this button allows viewing the order information related to the job. [Details](#).

Jobs filtered on the Search for RFMS Orders to Schedule tab can now be printed.

Using the Orders and line options filter to the desired list, and then click the  **Print Browse** Button.

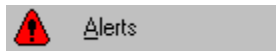
RFMS Orders To Schedule										STORE: ALL STORES JOB TYPE: ALL JOB TYPES CUSTOMER: ALL CUSTOMERS SALESPERSON: ALL SALESPERSONS ORDER NUMBER: ALL ORDERS TYPE: ALL ALERTS & NOTES	
Invoice	Order Type	ST	Customer	Sales Rep 1	Sales Rep 2	Ship To Name	JOB Info	Est Del Date	Order Date	Tele 1	Tele 2
CG001824	ORIGINAL	*	TAMARACK HOMES	HOUSE		80 FOREST GLEN GARI	80 FOREST GLEN GARI	76449	76443	205-333-0448	
CG001837	ORIGINAL	*	TAMARACK HOMES	MIKE		92 HUNTINGTON GARD		0	76444	205-333-0448	
CG001845	ORIGINAL	*	TAMARACK HOMES	HOUSE		92 HUNTINGTON GARD	92 HUNTINGTON GARD	76477	76445	205-333-0448	
CG001851	ORIGINAL	*	HAGLER CONSTRUCTI	MIKE		88 FOREST GLEN	88 FOREST GLEN	0	76407	205-454-4151	205-792-9961
CG001901	ORIGINAL	*	HESTEVOLD, BOOT	JEFF THOMP		HESTEVOLD, BOOT	3752 PAVE	DRIVE	76457	205-516-3895	
CL800026	CLAIMS	*	MANNINGTON MILLS			HARBIN, L. A	CG600693		75283	74988	
CL700076	CLAIMS	*	WARRANTY REPAIRS	HOUSE		PRO-BUILT CONSTRUC	CG600991		75493	75492	
CL800002	CLAIMS	*	EMSER TILE	HOUSE		CORNERSTONE HOME	CG703748		75694	75644	
CL800005	CLAIMS	*	SPACE FLOORING	GORDON		MCCURLEY, BOB	CG801814		75687	75687	

1/30/2012 DEMONSTRATION 1

Figure: Sample Report

Alerts

[Schedule Pro>File>Alerts](#)



This screen allows viewing and acting on 'Alerts' created in Order Entry and exported to the Schedule Pro module as well as tracking notes which are created in Schedule Pro.

To create alerts, set up specific Order Entry Options:

[Utilities>System Options>Order Entry>Alerts>Display Schedule Pro Alerts on Order Entry Browse](#)

Alerts are meant as a way for the scheduler to find out about new jobs that need to be scheduled (To Be Scheduled Alerts) and/or things that have been changed in Order Entry for jobs that have already been scheduled. **Tracking Notes** are a way to create a reminder for someone to follow up on some part of scheduling a job.

Filters

Filter through these alerts/notes by using Filters on the screen.

Filters	
Order Date <input type="text"/> <input type="button" value="F8"/> <input checked="" type="checkbox"/> All	Alert / Note <input type="text" value="ALL"/> <input type="button" value="v"/>
Est Del Date <input type="text"/> <input type="button" value="F8"/> <input checked="" type="checkbox"/> All	Job Type <input type="text"/> <input type="button" value="F8"/> <input checked="" type="checkbox"/> All
	Order Number <input type="text"/> <input type="button" value="F8"/> <input checked="" type="checkbox"/> All
	Customer <input type="text"/> <input type="button" value="F8"/> <input checked="" type="checkbox"/> All
	Store <input type="text"/> <input type="button" value="F8"/> <input checked="" type="checkbox"/> All
	Salesperson <input type="text"/> <input type="button" value="F8"/> <input checked="" type="checkbox"/> All

Alert/Notes options

All-All alerts and tracking notes

All Alerts-Only alerts

Orders To Be Scheduled - these alerts represent orders from the Order Entry module that have been sent over to the Schedule Pro module, but have not been scheduled nor have had any changes made to them. Schedule Pro will prompt deletion of this alert when any part of the order is scheduled.

Orders Voided – these alerts represent orders that have been sent from the Order Entry module, but have now been voided in Order Entry. There is a button in the Alerts screen that will allow deleting any jobs from the schedule that have an “Order Voided” alert. Clicking the button will also delete the related alerts.

Lines Added - these alerts represent customer orders that have had lines added to orders AFTER the order has been scheduled and BEFORE the scheduled date has passed. Note that the Product Code for the line is showing in the alert. If this is for a product code not used for scheduling (supplies, sundries, for example) delete these alerts. If it is a line to add to a scheduled job, do so (see below) from this screen and when returning to alerts a prompt will ask to delete the alert.

Lines Deleted – these alerts represent customer orders that have had lines deleted from an order AFTER the order has been scheduled and BEFORE the scheduled date has passed. There is a button in the Alerts screen that will allow deleting these lines from the scheduled jobs. Clicking the button will also delete the related alerts.

Lines Edited – these alerts represent customer orders that have had changes made to line information such as: Style/Item, Color/Description or Units in order entry AFTER the order has been scheduled and BEFORE the scheduled date has passed. These are optional and are not used by most users.

Lines Edited Qty – these alerts represent customer orders that have had changes made to line quantity in order entry AFTER the order has been scheduled and BEFORE the scheduled date has passed. These are among the most important alerts. There is a button that will automatically update the corresponding line (by line number) in the scheduled job to the NEW quantity in Order Entry. This auto-update will only work if the line hasn't been split over multiple days or multiple installers in Schedule Pro. When the auto-update is run, it will delete the alerts for any lines that it was able to change and leave the remaining alerts on this screen to be dealt with.

Line Status Cut/Reserved- these alerts show when individual lines are changed to the “Cut” or “Reserved” line status AFTER the order has been scheduled and BEFORE the scheduled date has passed. Alerting when material has been received for a scheduled job. Most people DO NOT use these alerts, as the scheduler will be inundated with this information.

See [REPORTS](#) for information on a report that will show any material lines that have NOT been received on jobs scheduled for a certain time period.

Tracking Notes- Only Tracking Notes These are the only alerts that can be made in Schedule Pro. They are notes that the scheduler can make as a reminder to follow up with a customer on scheduling at a set time in the future. These can be printed as well.

Alert Routines

WARNING: Any of these four Auto-Updates will apply to ALL alerts, regardless of filters applied on this screen. Therefore, even if filtered to a certain Job Type or Store Code, and Delete All Alerts for All Job Costed Orders is clicked, it is going to remove all the alerts for orders that have been job costed, regardless of whether any are showing on the screen at the time based on the filters.



Auto Update All Scheduled Quantities for All Edited RFMS Order Quantities

If a line was in Order Entry and was scheduled along with a job, and then the quantity was changed in Order Entry by someone who had the “Create Alerts for: Line Qty Edited” option set to yes, a Line Qty Edited alert will show the Order Number, Product Code, and Est. Del. Date for that line (in addition to other information.) To change the quantity of the related (the line with the same RFMS Order Number and Line Number) line in Schedule Pro to the NEW quantity in Order Entry FOR ALL LINE QTY EDITED alerts simultaneously, click this button. This will update all the lines it can, and for all the lines it updates, it will delete the alerts.

After clicking the button, some Line Qty Edited alerts may be left: the button will update all the lines that haven’t been split in Schedule Pro over several days or several trips or several crews. For the ones that have been split or partially scheduled, any adjustments will need to be made one at a time (see below).

Auto Delete All Scheduled Jobs for all RFMS Voided Orders

If an order was entered in Order Entry and was scheduled, and then it was deleted from Order Entry (before the Scheduled Date) by someone who had the “Create Alerts for: Order Voided” option set to yes, an Order Voided alert will be created. To delete the related job(s) from Schedule Pro FOR ALL ORDER VOIDED alerts simultaneously, click this button.

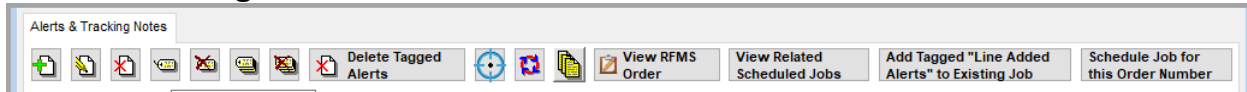
Auto Delete All Related Scheduled Lines for All Deleted RFMS Order Lines

If a line was in Order Entry and was scheduled along with a job, and then it was deleted from Order Entry by someone who had the “Create Alerts for: Line Deleted” option set to yes, a Line Deleted alert will show the Order Number, Product Code, and Est. Del. Date for that line (in addition to other information.) To delete the related (the line with the same RFMS Order Number and Line Number) line from Schedule Pro FOR ALL LINE DELETED alerts simultaneously, click this button.

Delete All Alerts for All Job Costed Orders

This button does exactly what it says. If there are leftover To Be Scheduled or Line Added alerts, for example, that were never used or deleted. If the job has been Job Costed in Order Entry, it is assumed for the normal user of RFMS that that job has been completed, billed, and completely closed in RFMS. Therefore, adding or editing the job in Schedule Pro is not necessary. With that in mind, click the button from time to time to clear out all “obsolete” alerts. This will also remove the related red icons from Order Entry.

Alert & Tracking Note Functions



Highlight an Alert or Tracking Note

Insert: only a tracking note can be added, alerts are automatically added from the system depending on the settings in *Utilities>System Options>Order Entry>Alerts>Display Schedule Pro Alerts on Order Entry Browse*

Edit:

Delete or Delete Tagged:

Tagging:

Search

Reset:

VIEW RFMS ORDER:

VIEW RELATED JOBS: Then hit "View Related Scheduled Jobs" to see all the Scheduled jobs related to that alert's Order Number (in a filtered View Scheduled Jobs screen). If there are multiple jobs related to this Order, for example, a tile job and a carpet job, you can highlight them in the top box and preview their lines in the bottom box of this screen to determine which is which and decide what job to edit.

ADD TAGGED "LINE ADDED ALERTS" TO EXISTING JOB: This button allows the user to tag Line Added types and add those lines to the existing job. This also allows you to remove the alert once the line is added.

SCHEDULE JOB FOR THIS ORDER NUMBER: This button allows the user to schedule jobs that are in the To Be Scheduled type. Once it is clicked it takes the user to the Schedule New Job screen. Once the job is scheduled the To Be Scheduled alert is deleted.

OPEN THE CORRECT JOB: Find the Scheduled job that relates to this alert (there will often only be one job showing in this screen), and double-click on it to open in the Edit & Complete screen.

PULL UP THE ORDER LINES: Hit the F8 button next to the Order Number to pull up the Order Entry lines and see which lines have been scheduled and which haven't (the lines with the Schedule Pro icon on the left HAVE been scheduled) and to compare the Total quantities of the lines in Order Entry v. the Scheduled Quantities of the lines.

EDIT & COMPLETE A JOB Data Entry Mode

OK CANCEL

INSTALLATION DEPOT & PRIMARY CREW
 Installation Depot: LINCOLN
 Primary Crew: _____
 Secondary Crew: _____
 Warehouse Prep: _____

JOB STATUS
 Job Status: IN PR
 Follow Up Employee: _____
 Follow Up Description: _____
 SERVICE DESCRIPTION: _____
 TRACKING TABLE 2: _____
 CONFIRMED: IN
 INSTALLER CONF: Y
 Occupied: IN

EDIT JOB LINES Deduct # of C

RFMS Line #	DC	PC	Job Type	St
1		01	CARPET	AB
3		04	CARPET	7#
8		81	CARPET	CF

SELECT RFMS ORDER LINES TO SCHEDULE

SEND TAGGED LINES TO SCHEDULED JOB

RFMS ORDER CUSTOM NOTES RFMS ORDER INTERNAL NOTES RFMS WORK ORDER CUSTOM NOTES

RFMS Order #	Est Del Date	Customer	Customer PO #	JOB NUMBER	Ship To Name	Ship To Address 1	Ship To City
CG703428	07/17/07	K&W CONSTRUCTION		THE OAKS		PAUL LA CROIX	LINCOLN

ORDER LINES ORDER LINE NOTES WORK ORDER LINE NOTES

Line is Already Scheduled Tag Lines to Associate with Scheduled Job >>>

Line #	PC	Roll / Item #	Style	Color	Quantity		Units	Status	Est Del Date
					Total	Scheduled			
1	01		ABINGTON	BEIGE	129.00	100.00	SY	Generate PO	07/17/07
2	02		VINYLCREST		25.11	0.00	SY	Generate PO	
3	04	PLATINUM	7# A&H FOREVER LU		122.55	100.00	SY	Generate PO	07/17/07
4	05	887	GROUT	ANTIQUE WHITE	5.00	0.00	EA	Generate PO	
5	06	124	SIERRA 6 X 6	IVORY	194.38	0.00	SF	Generate PO	
6	81		CPT INST STRETCH		129.00	100.00	SY	None	07/17/07
7	83		TILE INSTALL		194.38	0.00	SF	None	
8	83		VINYL INSTALL		25.11	0.00	SY	None	

NOTE: In this example, Lines 1, 3, and 6 have been scheduled. They are Carpet, Pad (Cushion), and Carpet Labor. It looks like 100 SY was scheduled, however, and 129 yards (and a little less for Pad (Cushion)) is in the Order Entry module. You can either (a) tag the lines and hit "Send Tagged Lines to Scheduled Job" to add the remaining quantity to the scheduled job in new lines. OR (b) you can exit this pop-up screen, delete the original lines, then pop back in (using the Order Number F8,) and tag and add the lines again now with the new quantity. Or (c) you can make a note of the new quantity, then go back to the Edit and Complete screen and manually edit the line quantities to the new amounts. After you manually edit, you can always pop back into the Order Number F8 screen to be sure the Total quantities and Scheduled quantities match.

While in the Edit & Complete screen Delete lines from the Scheduled job, edit line quantities, and Add lines to jobs (by using the Order Number F8 button, tagging lines, and hitting "Sent Tagged Lines to Scheduled Job") as needed. Once you're done editing, change the Reason for Edit, and hit OK. Then exit from the View Scheduled Jobs screen to return to alerts.

Record Details/Print Report

Order Internal Notes	Work Order Custom Notes	Action Date: 11/29/11	Next Action Date: 01/04/12
Order Custom Notes	Print Report for Filtered Records	Action By: KIMBERLY LEE	Next Action By: DAVID WILLIAMS
		Action: _____	Next Action: CONFIRM MATERIAL

A listing of the filtered alerts can be printed. Use the Print Report for Filtered Records button on the bottom of the screen.

Tracking Notes

ALERTS AND JOB TRACKING NOTES

✓ OK
✗ CANCEL

Type Alert Tracking Note

TRACKING NOTE

Date & Time Created: 05/19/10 1:37 PM

Order Number: F8

Order Type: ORIGINAL

Action By: SCHEDULER F8

Action Date: 05/19/10 F8

Action: BUYER CALLED TO SCHEDULE

Next Action By: F8

Next Action Date: F8

Next Action:

Follow Up Action By: F8

Follow Up Action Date: F8

Follow Up Action:

Note: CHECK WITH SALES RE: OUTSTANDING BALANCE

Figure: Tracking Note Screen

Tracking notes can be added any time, with or without an Order Number related. They are for schedulers to make notes for themselves to follow up on jobs that may not even be on the schedule yet. To add, click the **Insert** button on the Alerts screen. Then fill in the Order Number (if applicable,) Action, next action, and a note if needed, then click “OK” to save. Later, a list of these can be printed (see below.)

If, in the Edit & Complete screen, a job is put on Hold, or a job is cancelled without being deleted, it will bring this screen up and prompt for a tracking note to be entered. This is meant to be used when a job is postponed with no new date set. The tracking notes are used as reminders to follow up on the job after a certain amount of time has passed. Keep in mind, a “reminder” does not pop-up, and the Tracking Notes must be checked, whether on this screen or in report format, to be helpful.

Alert & Tracking Notes Report

Click the **print report for filtered records** button.

This report will print alerts just as they are filtered in the **RFMS Order Entry Alerts & Tracking Notes** screen. If filtered to only show “Tracking Notes” a listing of tracking notes can be printed, for follow up actions. On the other hand, a certain Salesperson can be filtered to give them a list of **To Be Scheduled** alerts to verify. The format looks like this:

ALERTS & TRACKING NOTES

STORE: ALL STORES
 JOB TYPE: ALL JOB TYPES
 CUSTOMER: ALL CUSTOMERS
 SALESPERSON: ALL SALESPERSONS
 ORDER NUMBER: ALL ORDERS
 TYPE: ALL

Order Number	Customer	Order Date	Action Date	Action By	Action
Order Type	Salesperson	Est Del Date	Next Action Date	Next Action By	Next Action
Line Number	JOB NUMBER	Alert / Note Type	Follow Up Action Date	Follow Up Action By	Follow Up Action
CG703381	K&W CONSTRUCTION	01/23/07	02/20/07	HG	LEFT MESSAGE ON MACHINE
ORIGINAL	DOROTHY MCWILLIAMS	03/13/07	02/21/07	GENNIE ACCOUNTANT	THEY WILL CALL THIS AFT. WITH A DATE
NA	9 / MEDITERRANEAN VLLAGE	TRACKING NOTE			
Note:					
CG703414	K&W CONSTRUCTION	04/06/07			
ORIGINAL	FRED LOVE	04/17/07			
NA	27 / SWAN GROVE	TO BE SCHEDULED			
Note:					
CG402252	LEDBETTER, SUSAN	03/05/04			




Create Provider Records

Schedule Pro>File>Create Providers Records

Before beginning to use this section of Schedule Pro check the settings in *>Utilities>System Options>Schedule Pro>Providers*. The information sent is customized in those settings. [Click here for details.](#)

Schedule Pro integrates with Order Entry when entering a provider record to keep the pay status associated with installers or suppliers in the RFMS application.

Jobs listed here are determined first by the default settings in *>Utilities>System Options>Schedule Pro>Providers Category Default Filters*.

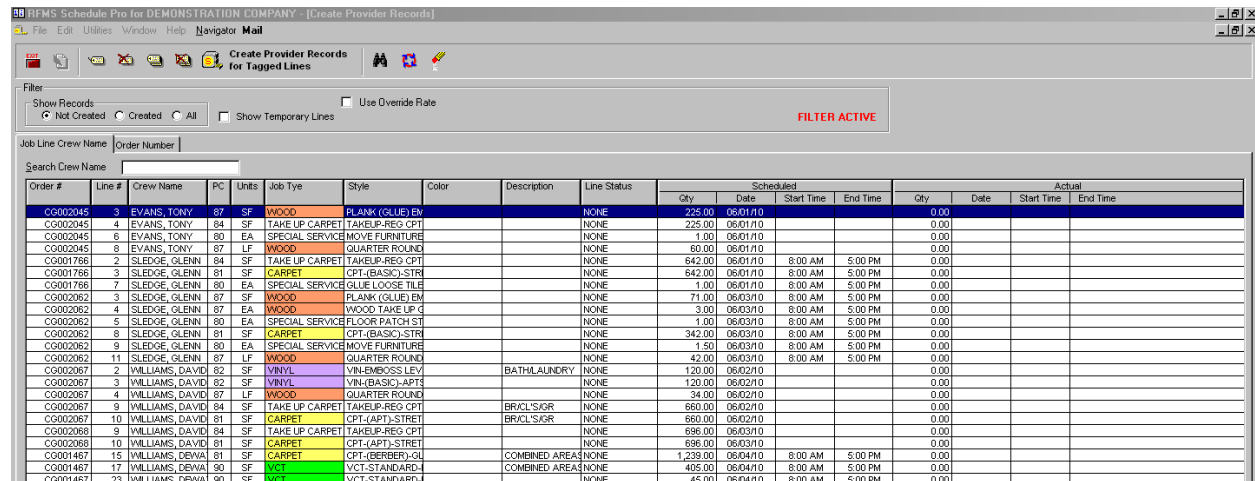
Use the find button to locate other jobs. To go back to the default settings while still in the screen, use the reset button.  The clear filter button  will set the find to include all records. The remark type was added to the options for finding scheduled jobs in, Scheduled Jobs, Quick Schedule, Quick Edit, Weekly Grid and Create Providers. Only scheduled jobs with the selected remark type will be found. Remarks can be added to scheduled jobs in Client Management or via the Client Management Remote Actions Button  while in Schedule Pro. (Version 11.1)

Let's also say Joe Installer is marked with a pay status of Do Not Pay in Human Resources. If a provider record is added in Schedule Pro, this status will be inherited in Order Entry for this customer order.

Schedule Pro has also been updated to work with ERRM. When Schedule Pro posts an installer record to Order Entry, then the appropriate journal entries will be made if ERRM is turned on.


Creating Provider Records

Schedule Pro>File>Create Providers Records



Order #	Line #	Crew Name	PC	Units	Job Type	Style	Color	Description	Line Status	Scheduled				Actual				
										Qty	Date	Start Time	End Time	Qty	Date	Start Time	End Time	
CG002045	3	EVANS, TONY	87	SF	WOOD	PLANK (GLUE) EM			NONE	225.00	06/01/10			0.00				
CG002045	4	EVANS, TONY	84	SF	TAKE UP CARPET	TAKEUP-REG CPT			NONE	225.00	06/01/10			0.00				
CG002045	6	EVANS, TONY	80	EA	SPECIAL SERVICE	MOVE FURNITURE			NONE	1.00	06/01/10			0.00				
CG002045	8	EVANS, TONY	87	LF	WOOD	QUARTER ROUND			NONE	60.00	06/01/10			0.00				
CG001786	2	SLEDGE, GLENN	84	SF	TAKE UP CARPET	TAKEUP-REG CPT			NONE	642.00	06/01/10	8:00 AM	5:00 PM	0.00				
CG001786	3	SLEDGE, GLENN	81	SF	CARPET	CPT-(BASIC)-STR			NONE	642.00	06/01/10	8:00 AM	5:00 PM	0.00				
CG001786	7	SLEDGE, GLENN	80	EA	SPECIAL SERVICE	GLUE LOOSE TILE			NONE	1.00	06/01/10	8:00 AM	5:00 PM	0.00				
CG002062	3	SLEDGE, GLENN	87	SF	WOOD	PLANK (GLUE) EM			NONE	71.00	06/03/10	8:00 AM	5:00 PM	0.00				
CG002062	4	SLEDGE, GLENN	87	EA	WOOD	WOOD TAKE UP C			NONE	3.00	06/03/10	8:00 AM	5:00 PM	0.00				
CG002062	5	SLEDGE, GLENN	80	EA	SPECIAL SERVICE	FLOOR PATCH ST			NONE	1.00	06/03/10	8:00 AM	5:00 PM	0.00				
CG002062	8	SLEDGE, GLENN	81	SF	CARPET	CPT-(BASIC)-STR			NONE	342.00	06/03/10	8:00 AM	5:00 PM	0.00				
CG002062	9	SLEDGE, GLENN	80	EA	SPECIAL SERVICE	MOVE FURNITURE			NONE	4.00	06/03/10	8:00 AM	5:00 PM	0.00				
CG002062	11	SLEDGE, GLENN	87	LF	WOOD	QUARTER ROUND			NONE	42.00	06/03/10	8:00 AM	5:00 PM	0.00				
CG002067	2	WILLIAMS, DAVID	82	SF	VINYL	VIN-EMBOSSE LEV	BATH/LAUNDRY		NONE	120.00	06/02/10			0.00				
CG002067	3	WILLIAMS, DAVID	82	SF	VINYL	VIN-(BASIC)-APT			NONE	120.00	06/02/10			0.00				
CG002067	4	WILLIAMS, DAVID	87	LF	WOOD	QUARTER ROUND			NONE	34.00	06/02/10			0.00				
CG002067	9	WILLIAMS, DAVID	84	SF	TAKE UP CARPET	TAKEUP-REG CPT	BRICK/SGR		NONE	660.00	06/02/10			0.00				
CG002067	10	WILLIAMS, DAVID	81	SF	CARPET	CPT-(APT)-STRET			NONE	660.00	06/02/10			0.00				
CG002068	9	WILLIAMS, DAVID	84	SF	TAKE UP CARPET	TAKEUP-REG CPT			NONE	696.00	06/03/10			0.00				
CG002068	10	WILLIAMS, DAVID	81	SF	CARPET	CPT-(APT)-STRET			NONE	696.00	06/03/10			0.00				
CG001467	15	WILLIAMS, DEVAL	81	SF	CARPET	CPT-(BERBER)-GL	COMBINED AREAS	NONE	1,239.00	06/04/10	8:00 AM	5:00 PM	0.00					
CG001467	17	WILLIAMS, DEVAL	90	SF	VCT	VCT-STANDARD-I	COMBINED AREAS	NONE	405.00	06/04/10	8:00 AM	5:00 PM	0.00					
CG001467	23	WILLIAMS, DEVAL	90	SF	VCT	VCT-STANDARD-I		NONE	45.00	06/04/10	8:00 AM	5:00 PM	0.00					

This screen is where the provider information from schedule pro to the provider's record in RFMS Core is tagged and sent. The only lines listed here will be service lines or temporary lines. Provider records can also be created from the [Quick Edit Screen](#).

Use the find button to list the records to be created and then tag the records to create. The ability to search by multiple **job types** for finding scheduled jobs was added in **Create Providers Records** in version 11.1. After running the update, the system will default to having all **job types** tagged. Click the **Find** button . Click **F8** at **job types**. Tag **job types** to be included. This list is sticky (will remain until changed manually).

Click the **Create Provider...** button to actually post these records to RFMS Core.

Use Override Rate

When creating provider records, check the **use override rate** box, and then click in the **rate** field and type in the new rate to use. This is the rate which will be used to create the provider record regardless of other system settings, the order line costs, provider type, provider rates and load costs. Once the use override rate box is checked another box, **Ignore Override Rates = 0** displays. Checking this box allows using the feature to use the "Cost" from the Order Line for the rate to pay the provider.

Provider records sent over from Schedule Pro can be edited once they are in Order Entry just like any other provider records.

Job Line Crew Name		RFMS Order #											
Order #	Line #	Crew Name	PC	Units	Job Tye	Style	Color	Description	Line Status	Override Rate	Scheduled		
											Qty	Date	Sta
CL000001	2	EVANS, TONY	81	SF	CARPET	CPT-(BASIC)-STRI			NONE	3.50	450.00	07/09/10	8:
CG001932	3	SLEDGE, GLENN	81	SF	CARPET	CPT-(BASIC)-STRI			NONE	0.00	336.00	07/09/10	8:
CG001932	4	SLEDGE, GLENN	80	EA	SPECIAL SERVICE	PRE-MEASURE \$5			NONE	0.00	1.00	07/09/10	8:

Subcontractor & Non-Hourly Employee Installer Provider Record:

Changing a Provider Record

Provider

Store: ""

Name: Provider, Joe

Worker #: 326

Pay Type: Salaried+Commission

Invoice Number: CG002054

Order Date: 05/24/10

Delivery Date:

Installation Date: 06/01/10

Work Order Number: CPT-BAS

Product Code: 81 CARPET INSTALLATION

Service: CPT-(BASIC)-STRETCH/IN

Service #: CP/BA-S

Rate: 0.0000

Total Units: 928.00

Overtime Hours: -----

Doubletime Hours: -----

Miscellaneous Earnings: 0.00

Total Earnings: \$0.00

Paid

Date Paid:

Special Period

Pay Status: 000-OK to Pay

Do not Accrue

OK Cancel

Name: This comes from the “RFMS Associated Supplier / Installer” of the Crew that was assigned to the job in Schedule Pro.

- If the Name is blank, first be sure there was a crew assigned to the job.
- If there was a Crew, go to Setup / Crews and look up that Crew’s record. Be sure the “RFMS Associated Supplier / Installer” is populated. This should either pull in from Human Resources / Worker Information file, or less commonly, from the Supplier file in RFMS.

Worker #: This comes from the “RFMS Associated Supplier / Installer” of the Crew that was assigned to the job in Schedule Pro. If it is blank, that probably means Worker numbers are not used in the HR module. Otherwise, it would be blank for the same reasons as the Name – see above.

Pay Type: This comes from the “RFMS Associated Supplier / Installer” of the Crew that was assigned to the job in Schedule Pro. If it is “Subcontractor,” the install quantities of the job will pull over from Schedule Pro. If it is “Hourly,” there will be a place below to manually fill in the number of hours for which to pay the crew.

Invoice Number: This is the Order Number of the job and the order in Order Entry.

Order Date: This is the date the order was entered, and pulls from Order Entry.

Delivery Date: This is the date that the line was set to “Delivered,” and comes from Order Entry, usually during the Job Costing process.

Installation Date: This date pulls from Schedule Pro, and is, by default, the scheduled date of the job.

For multiple day jobs, if the setting in in *>Utilities>System Options>Schedule Pro>Providers Combine Split Lines & Display on Last Install Date* is set to yes, this will be the last date of any multiple day jobs. If this is not checked, usually there will be a record created for each day of installation for each labor line.

If the *Utilities* in *>Utilities>System Options>Schedule Pro>Providers>Use Units and Dates from* is set to “Actual,” rather than scheduled, which is NOT RECOMMENDED, it will pull the date from the field in the Schedule Pro Job Line that is labeled “Actual Date.” Less than 1% of Schedule Pro users use this setting. It is meant to track the Scheduled Date v. the Actual Date of install, but most users prefer to just change the schedule if there is a date change.

Worker Order Number: Based on the setting in *>Utilities>System Options>Schedule Pro>Providers>Provider Work Order Number Field*, this can:

- Be left blank
- Show the Order Number of the job and the order in Order Entry (same as Invoice Number)
- Show the first 8 characters of the Service Description from the labor line, i.e. “CPT INST”

Product Code: This, by default, is the Product Code of the labor line that was used to create the Provider Record, and pulls from Schedule Pro. If the, in *>Utilities>System Options>Schedule Pro>Providers>Automatically Set Product Code to 00* switch is set to Never,

it will be “00” – this feature is used very rarely, and is meant to help people who pay labor out of Accounts Payable rather than Human Resources.

Service: This is the Service Description from the labor line.

Service #: This is the Service Number from the labor line.

Service: This is the Service Description from the labor line, and pulls from Schedule Pro.

Rate: (Subcontractor & Non-Hourly Employee Only) this is the Gross Cost from the Order Entry line. If the, in *>Utilities>System Options>Schedule Pro>Providers>Automatically Set Rate to 0* switch is set to Never, it will pull the Gross Cost from the associated labor line.

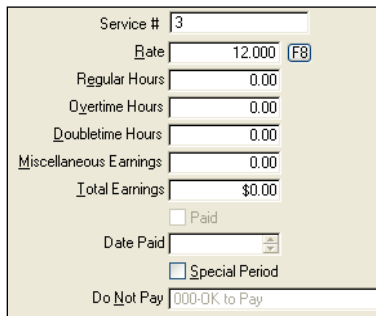
- If this switch is set to “Subcontractor ONLY,” for Crews marked Subcontractor in the Human Resources > Worker Information file, the rate will be “0” when the record is first created. This will be edited manually. This setting is meant for companies who pay various installers different rates for the same service item.
- If this switch is set to “Always,” the rate will always be “0” when the record is first created. This will be edited manually later on.

Total Units: (Subcontractor & Non-Hourly Employee Only) this is the number of SF, SY, EA, or other units of installation on the labor line in *Schedule Pro* that was sent to provider records.

Miscellaneous Earnings: This will always be blank when the provider record is created, but can be used to make manual adjustments, both positive and negative.

Total Earnings: This is the Rate x Units + Miscellaneous Earnings.

Some additional fields for Hourly Installer Provider Record:



Service #	3
Rate	12.000 (F8)
Regular Hours	0.00
Overtime Hours	0.00
Doubletime Hours	0.00
Miscellaneous Earnings	0.00
Total Earnings	\$0.00
<input type="checkbox"/> Paid	
Date Paid	
<input type="checkbox"/> Special Period	
Do Not Pay	000-OK to Pay

Rate: (Hourly Only) this is the hourly rate of the Crew’s RFMS Associated Supplier/Installer Record. For installers, this is set up in the Human Resources / Worker Information file.

All other Hours & Earnings fields: must be populated manually after the Provider Record has been sent over.

Reports

Schedule Pro>File>Reports

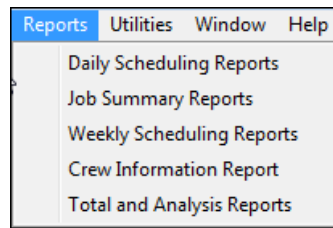
[Daily Scheduling Reports](#)

[Job Summary Reports](#)

[Weekly Scheduling Reports](#)

[Crew Information Reports](#)

[Total and Analysis Report](#)



Thousands of report configurations are available in Schedule Pro, based on the various filters, sorts, and page breaks definable in the Reports screen.



Schedule Pro Reports and Order Entry Field Mapping

If the Customer Name is set up in [Order Entry Field Mapping](#) as “First Name, Last Name”, then the F8 button on Schedule Pro Reports will not return any results when you pick a customer from the customer file. The Customer Name will need to be manually entered or use the % sign in the search.

General Report Features

Preview

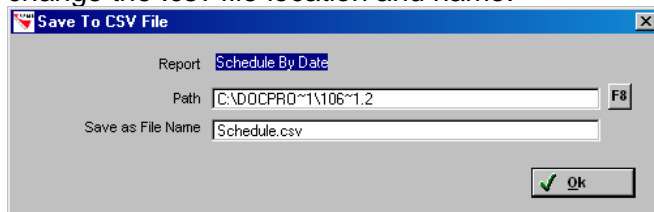


Click the button to preview the selected reports one at a time.

Output to CSV

Output to CSV File

Check this box to send the selected report(s) to a .csv file for each report. Only those reports listed in teal will export to a .csv file. The default location of this file is determined in set up. With this box is checked, when the **Print** button is clicked, a dialog box will display to confirm or change the .csv file location and name.



If a hard copy of the report is not needed, then choose preview and click the red x to not print.

Print

This selection sends the report to the chosen printer.



Preview


Use the preview option to verify the report or data.

The information on the bottom of the report is set in System Settings.

07/15/10 11:31 AM	TESTING	1
-------------------	---------	---

Define Filters

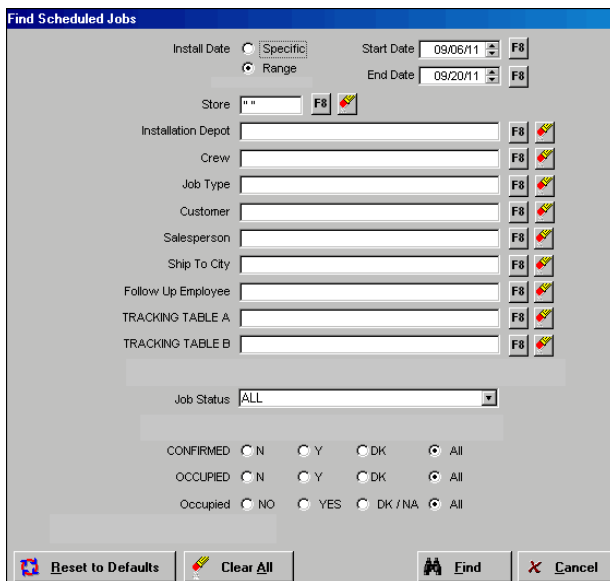
Jobs listed here are determined first by the default settings in *Utilities>System Options>Schedule Pro>General>Category Default Filter Settings*. Use the find button to locate other jobs. To go back to the default settings while still in the screen, use the reset button.  The clear filter button  will set the find to include all records.

If a filter is applied here, any reports will only include the records within that filtered range. This is indicated by the button being blue.  So, if data is missing on a report, be sure to check the filter settings.

The report header will show the filters selected on the top of the report.

```

STORE: ALL STORES
DEPOT: ALL DEPOTS
CREW: ALL CREWS
JOB TYPE: ALL JOB TYPES
CUSTOMER: ALL CUSTOMERS
SALESPERSON: ALL SALESPERSONS
SHIP TO CITY: ALL CITIES
DATE: 07/09/10 to 07/09/10
    
```



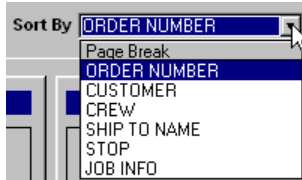
Print for Install Date(s)

- The default option is based on *Utilities>System Options>Schedule Pro>General>Date Filter*
- Specific: A single day: this defaults to “today.”
- Date Range: this defaults to “today” to two weeks later. Enter or select different Start and End dates if desired. To include all set **Start Date** to 01/01/80 and **End Date** to 12/31/79

Sort By

This field is set to a default based in system options.

This sets up a sort for any reports printed (with a few exceptions, like Crew Names & Contacts, that have their own sort hardcoded). Options include: Order Number, Customer, Crew, Ship to Name, Stop, or "Job Number", which is a user defined field in RFMS, and may be called "Side mark," "Job / Lot," "Add'l Info" or something else.



Report Parameters and Options

After setting the top filters (above), select the additional options to include for the type of report, then "check" the box for the report or reports. Multiple reports can be printed at the same time. Then click "Preview" or "Print." Some of the additional printing options available within the Report Parameter and options boxes are as follows:

Page Break

This will be applicable for all reports in the same box. The user can specify how the report will print by selecting whether to Page Break, and, if so, to use Store, Depot, Job Type, Crew, Customer or Salesperson.

Include Scheduler Job Notes

Checking this box will make sure any Scheduler Job Notes (added to the job header in Schedule Pro) will print on the report, just below that job.

Order Number Customer	Ship To Name JOB NUMBER	Ship To Address	Primary Crew Warehouse Prep	Primary Qty Job Status
FRIDAY 05/23/08				
CG889050 K&W CONSTRUCTION	MILLER, JOE 45 / SWAN GROVE	234 LINCOLN WAY / THE GREENWAY LINCOLN NE 68510	BARRY GRAMMER	TILE 1074 SF IN PROGRESS
Scheduler Job Note 05/21/08 - 09:40 : heather -				
Key is under rock near front door.				

Include Crew Contacts

The additional information from the contact tab in crew set up would be included.

CG002105	Store Name/Depot Name IN HOUSE	SNYDER, CLARICE GORDON
	07/09/10 8:00 AM To 5:00 PM	EVANS, TONY
Crew Contacts: TONY EVANS, JIMBO EVANS, OTHER CREW		

Note: The landscape reports display information which is not available on portrait reports. Daily reports are based on lines; summary reports are based on the header.

Daily Scheduling Reports

Schedule Pro>File>Reports>Daily Scheduling Reports

Report of jobs including the individual lines. First choose the lines to include from the grid. Deduct Capacity-as defined in system options [capacity settings](#).

Show Lines	Deduct Capacity Lines	Non Deduct Capacity Lines	Miscellaneous Lines
Roll Goods	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Items	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Services	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Temporary	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Then, choose the report for the required sort by... and desired amount of information.

Only the report titles written in teal can be outputted to a CSV format.

Daily Schedule Report by

Landscape Reports

Because of the size, landscape reports can contain more columns of information. These all have the same information they differ in how they are sorted.

Order Number	Store	Customer	Ship To Name	Ship to Address	Job Status	Stop
	Depot	Salesperson	Job Number	Ship to City State Zip	Warehouse	Progress
	Date & Time	Crew	Style	Color	Prep	Qty
					Job Type	

DAILY SCHEDULE REPORT BY DATE & TIME

STORE: ALL STORES
 DEPOT: ALL DEPOTS
 CREW: ALL CREWS
 JOB TYPE: ALL JOB TYPES
 CUSTOMER: ALL CUSTOMERS
 SALESPERSON: ALL SALESPERSONS
 SHIP TO CITY: ALL CITIES
 DATE: 07/01/12 to 08/16/12

Order Number	Store Depot Date & Time	Customer Salesperson Crew	Ship To Name Job Number Style	Ship To Address Ship To City State Zip Color	Job Status Warehouse Prep Job Type	Stop Progress Qty
THURSDAY 07/12/12						
CG201395	DEMO STORE TUSCALOOSA 07/12/12 8:00 AM To 5:00 PM	TEST EDIT QTY MATERIAL FROM ST FRED LOVE BOOTH, JAMES	300TX PENROSE BOTTLE-SEALER/CARPET	FIESTA 10-145 APPLICATOR	COMPLETED CARPET SF SUPPLIES EA	DAY 1 OF 1 12.00 2.00
						Total # of Jobs 1
FRIDAY 07/13/12						
WEDNESDAY 07/18/12						
CG201394	DEMO STORE NORTHPORT 07/18/12 8:00 AM To 5:00 PM	COLES TEST FRED LOVE RUSHING, LYLE	COLES TEST ANIMATED - HSC - 12'	CORINTHIAN	COMPLETED CARPET SF	DAY 1 OF 1 150.00
CG201396	DEMO STORE GORDO 07/18/12 8:00 AM To 5:00 PM	TEST OPEN SCHEDULE PRO FRED LOVE SLEDGE, GLENN	TEST OPEN SCHEDULE PRO CPT-(APT)-GLUEDOWN REBOND XV025 - STAINMASTER	1/2" REBOND 3.5# BROWN SPICE	IN PROGRESS CARPET SF CARPET SF CARPET SF	DAY 1 OF 1 1.00 1.00 12.00
						Total # of Jobs 2
THURSDAY 07/19/12						
CG201398	DEMO STORE NORTHPORT 07/19/12 8:00 AM To 5:00 PM	TEST ALL DAY JOB FRED LOVE PARKER, ZACH	TEST ALL DAY JOB CPT-(APT)-GLUEDOWN		IN PROGRESS CARPET SF	DAY 1 OF 1 500.00
						Total # of Jobs 1
FRIDAY 07/20/12						
	STORE NAME TUSCALOOSA 07/20/12 8:00 AM To 5:00 PM	TEST AARON, CEDRIC			IN PROGRESS MEASURE EA	DAY 1 OF 1 1.00
						Total # of Jobs 1
08/02/12 10:59 AM			DEMONSTRATION			1

Portrait Reports

Order Number	Job Number	Customer	Ship to Address	Stop
	Job Status	Ship to Name	Ship to City State Zip	Progress
	Date & Time	Crew	Job Type	Qty

DAILY SCHEDULE REPORT BY CREW & DATE					STORE: ALL STORES
					DEPOT: ALL DEPOTS
					CREW: ALL CREW!
					JOB TYPE: ALL JOB TYPES
					CUSTOMER: ALL CUSTOMERS
					SALESPERSON: ALL SALESPERSONS
					SHIP TO CITY: ALL CITIES
					DATE: 07/01/12 to 08/16/12
Order Number	Job Number	Customer	Ship To Address	Ship	Progress
Job Status	Date & Time	Ship To Name	Ship To City State Zip	City	Qty
Job Type		Crew	Job Type		
AARON, CEDRIC - FRIDAY 07/20/12					
	IN PROGRESS	TEST		DAY 1 OF 1	
07/20/12	8:00 AM To 5:00 PM	AARON, CEDRIC	MEASURE EA		1.00
					Total # of Jobs: 1
AARON, CEDRIC - MONDAY 07/23/12					
	IN PROGRESS	TEST 1		DAY 1 OF 1	
07/23/12	8:00 AM To 12:00 PM	AARON, CEDRIC	MEASURE EA		1.00
	IN PROGRESS	TEST 2		DAY 1 OF 1	
07/23/12	8:00 AM To 12:00 PM	AARON, CEDRIC	MEASURE EA		1.00
					Total # of Jobs: 2
AARON, CEDRIC - TUESDAY 07/24/12					
CG201400	COMPLETED	FOR SWADE		DAY 1 OF 4	
07/24/12	8:00 AM To 5:00 PM	AARON, CEDRIC	CARPET SF		125.00
					Total # of Jobs: 1
AARON, CEDRIC - WEDNESDAY 07/25/12					

Jobs Edited

Use the drop down list to choose the time frame of the edits to see only the latest edits made. For example to see what changes daily run the report at the end of each day for today. The jobs included on the report will still have to fall within the date parameters for the reports regardless of the edit dates.

Order Number	Store	Customer	Crew	Style	Qty
Job Type	Depot	Ship To Name	Warehouse Prep	Color	Material Status

Material Status

These reports are useful in listing jobs with materials which need to be ordered or have not been received for upcoming jobs.

Filter Material Status by Supplier	<input type="text"/>	F8	
Print For Status:	<input type="checkbox"/> Reserved	<input type="checkbox"/> On Order - Promise Date Conflicts	
	<input type="checkbox"/> None	<input type="checkbox"/> Cut	<input type="checkbox"/> On Order - All
	<input type="checkbox"/> Gen PO	<input type="checkbox"/> Staged	<input type="checkbox"/> Delivered
			<input type="checkbox"/> Job Costed
<input type="checkbox"/> Material Status (Landscape)			
<input type="checkbox"/> Material Status with PO Information (Landscape)			
<input type="checkbox"/> Provider Records Status (Landscape)	ALL		

Filter Material Status by Supplier

Use the **F8** Key to search for and select a single supplier to limit the material status reports.

Print for Status

Choose either On Order- Promise Date Conflicts or On Order-All
The status choices apply to both the material and provider reports.

Material Status

MATERIAL STATUS REPORT - NONE / GEN PO / ON ORDER / CUT / RESERVED / STAGED / DELIVERED / JOB COSTED						STORE: ALL STORES
Order Number Job Type	Customer Ship To Name	Crew Warehouse Prep	Style Color	Supplier Promise Date / Install Date	Qty Material Status	
FRIDAY 07/09/10						
CARPET SF	A.E. SANDERS CONSTRUCTION, II	BOOTH, JAMES		07/09/10	1.00 TEMPORARY LINE	
CG001932 CARPET SF	NORTHPORT TO, SHIP	SLEDGE, GLENN	CPT-(BASIC)-STRETCH/IN	WCO 07/09/10	168.00 NONE	

Figure: Sample Report

Material Status with PO Information

MATERIAL STATUS REPORT - NONE / GEN PO / ON ORDER / CUT / RESERVED / STAGED / DELIVERED / JOB COSTED						
Order Number Job Type	Customer Ship To Name	Crew Warehouse Prep	Style Color Supplier	PO Reference PO Sidemark PO Comments	Qty Material Status	
FRIDAY 07/09/10						
CARPET SF	A.E. SANDERS CONSTRUCTION, II	BOOTH, JAMES			1.00 TEMPORARY LINE	
CG001932 CARPET SF	NORTHPORT TO, SHIP	SLEDGE, GLENN	CPT-(BASIC)-STRETCH/IN		168.00 NONE	
			07/09/10 WCO			

Figure: Sample Report

Provider Records Status

Use the drop down list to choose between all, created or not created provider records.

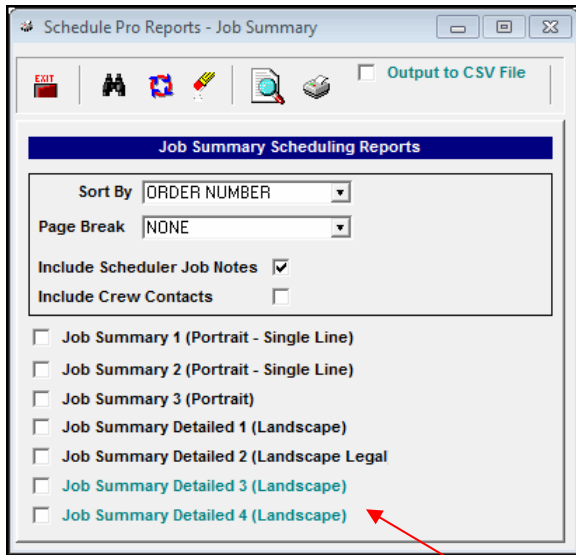
Order Number Store / Depot	Customer Ship To Name	Crew Job Type	Style Color	Order Line Qty Order Line Status	Qty Labor \$
FRIDAY 07/09/10					
** IN HOUSE	A.E. SANDERS CONSTRUCTION, II	BOOTH, JAMES CARPET		TEMPORARY LINE	1 SF \$0.00
CG002025 ** IN HOUSE	PRELICH, TOM PRELICH, TOM	NO CREW ASSIGNED 80 SPECIAL SERVICES	MOVE FURNITURE	1 EA DELIVERED	1 EA \$50.00

Figure: Sample Report

Job Summary Reports

[Schedule Pro](#)>[File](#)>[Reports](#)>[Job Summary Reports](#)

Do not include the lines and print one record per job per day.



Only the report titles written in teal can be outputted to a CSV format.

The choice of summary report is determined by the information desired to include.

Job Summary 1-3 (Portrait)

All include the shaded information in the first table. Additional information included in each report is shaded in the table under the report number.

Portrait	Order Number	Customer
Ship to name	Primary Qty	Job #
Primary Crew	Ship to Address	Job Status

Job Summary 1 Job Number

Portrait	Order Number	Customer
Ship to name	Primary Qty	Job #
Primary Crew	Ship to Address	Job Status

Order Number	Customer	Ship To Name	Job Number	Primary Qty
FRIDAY 07/09/10				
	A.E. SANDERS CONSTRUCTION, IN			CARPET 1 SF
CG001932	NORTHPORT	TO, SHIP	JOB #	CARPET 336 SF
CG002025	PRELICH, TOM	PRELICH, TOM	5924 LAKE RIDGE AVENUE	WOOD 144 SF
CG002105	SNYDER, CLARICE	SNYDER, CLARICE	13173 CENTURY DR	SPECIAL SERVICES 1 EA
CL000001	CARPET ONE	MARSH, GENE & KIM	CG903188	CARPET 450 SF

Figure: Sample Report

Job Summary 2 Primary Crew

Portrait	Order Number	Customer
Ship to name	Primary Qty	Job #

Primary Crew	Ship to Address	Job Status
--------------	-----------------	------------

Order Number	Customer	Ship To Name	Primary Crew	Primary Qty
FRIDAY 07/09/10				
	A.E. SANDERS CONSTRUCTION, IN		BOOTH, JAMES	CARPET 1 SF
CG001932	NORTHPORT	TO, SHIP	EVANS, TONY	CARPET 336 SF
CG002025	PRELICH, TOM	PRELICH, TOM	NO CREW ASSIGNED	WOOD 144 SF
CG002105	SNYDER, CLARICE	SNYDER, CLARICE	EVANS, TONY	SPECIAL SERVICES 1 EA
CL000001	CARPET ONE	MARSH, GENE & KIM	EVANS, TONY	CARPET 450 SF

Figure: Sample Report

Job Summary 3 Ship to Address/Job Status

Portrait	Order Number	Customer
Ship to name	Primary Qty	Job #
Primary Crew	Ship to Address	Job Status

Order Number Customer	Ship To Name Job Number	Ship To Address	Primary Qty Job Status
FRIDAY 07/09/10			
	A.E. SANDERS CONSTRUCTION, IN		CARPET 1 SF COMPLETED
CG001932 NORTHPORT	TO, SHIP JOB #	13682 RHANDA PKWY NORTHPORT AL 35475	CARPET 336 SF START
CG002025 PRELICH, TOM	PRELICH, TOM 5924 LAKE RIDGE AVENUE	5924 LAKE RIDGE AVE TUSCALOOSA AL 35406	WOOD 144 SF COMPLETED
CG002105 SNYDER, CLARICE	SNYDER, CLARICE 13173 CENTURY DR	13173 CENTURY DR NORTHPORT AL 35475	SPECIAL SERVICES 1 EA COMPLETED
CL000001 CARPET ONE	MARSH, GENE & KIM CG903188	13566 REJENAL FORREST ROAD NORTHPORT AL 35473	CARPET 450 SF COMPLETED

Figure: Sample Report

Job Summary Detailed 1-4

All include the shaded information in the first table. Additional information included in each report is shaded in the table under the report number.

Landscape	Order Number	Customer
Ship to name	Primary Qty	Job #
Primary Crew	Ship to Address	Job Status

Job Summary Detailed 1 Ship to Address/Warehouse Prep Start/End Date

Landscape	Order Number	Customer
Ship to name	Primary Qty	Job #
Primary Crew	Ship to Address	Job Status
Warehouse Prep	Start/End Date	

Order Number Customer	Ship To Name Job Number	Ship To Address	Primary Crew Warehouse Prep	Primary Qty Job Status	Start Date End Date
FRIDAY 07/09/10					
	A.E. SANDERS CONSTRUCTION, I		BOOTH, JAMES	CARPET 1 SF COMPLETED	07/09/10 07/09/10
CG001932 NORTHPORT	TO, SHIP JOB #	13682 RHANDA PKWY NORTHPORT AL 35475	EVANS, TONY	CARPET 336 SF START	07/09/10 07/09/10
CG002025 PRELICH, TOM	PRELICH, TOM 5924 LAKE RIDGE AVENUE	5924 LAKE RIDGE AVE TUSCALOOSA AL 35406	NO CREW ASSIGNED	WOOD 144 SF COMPLETED	07/09/10 07/09/10
CG002105 SNYDER, CLARICE	SNYDER, CLARICE 13173 CENTURY DR	13173 CENTURY DR NORTHPORT AL 35475	EVANS, TONY	SPECIAL SERVICES 1 EA COMPLETED	07/09/10 07/09/10
CL000001 CARPET ONE	MARSH, GENE & KIM CG903188	13566 REJENAL FORREST ROAD NORTHPORT AL 35473	EVANS, TONY	CARPET 450 SF COMPLETED	07/09/10 07/09/10

Figure: Sample Report

Job Summary Detailed 2 Ship To Address, Store, Depot, Warehouse Prep, Job Types and Start/End Date.

Requires legal size paper.

Landscape/Legal	Order Number	Customer
Ship to name	Primary Qty	Job #
Primary Crew	Ship to Address	Job Status
Warehouse Prep	Start/End Date	Store
Depot	Job Types	

Order Number Customer	Ship To Name Job Number	Ship To Address	Store Depot	Primary Crew Warehouse Prep	Job Type(s) Primary Qty	Start Date / End Date Job Status
FRIDAY 07/09/10						
A.E. SANDERS CONSTRUCTION, IN			WHEAT'S CARPET ONE-FLOOR/HOME IN HOUSE	BOOTH, JAMES	CARPET CARPET 1 SF	07/09/10 07/09/10 COMPLETED
CG001932 NORTHPORT	TO, SHIP JOB #	19892 RHANDA PKWY NORTHPORT AL 36475	WHEAT'S CARPET ONE-FLOOR/HOME IN HOUSE	EVANS, TONY	CARPET, SPECIAL SERVICES CARPET 336 SF	07/09/10 07/09/10 START
CG002025 PRELICH, TOM	PRELICH, TOM 5924 LAKE RIDGE AVENUE	5924 LAKE RIDGE AVE TUSCALOOSA AL 35406	WHEAT'S CARPET ONE-FLOOR/HOME IN HOUSE	NO CREW ASSIGNED	WOOD, SPECIAL SERVICES, TAKE UP CARPET, WOOD 144 SF	07/09/10 07/09/10 COMPLETED
CG002105 SNYDER, CLARICE	SNYDER, CLARICE 13173 CENTURY DR	13173 CENTURY DR NORTHPORT AL 36475	WHEAT'S CARPET ONE-FLOOR/HOME IN HOUSE	EVANS, TONY	SPECIAL SERVICES SPECIAL SERVICES 1 EA	07/09/10 07/09/10 COMPLETED
CL000001 CARPET ONE	MARSH, GENE & KIM CG903188	13668 REJENAL FORREST ROAD NORTHPORT AL 36473	WHEAT'S CARPET ONE-FLOOR/HOME IN HOUSE	EVANS, TONY	CARPET CARPET 450 SF	07/09/10 07/09/10 COMPLETED

Figure: Sample Report

Job Summary Detailed 3 Primary Quantity Style, Primary Quantity Status and Time Slot.

Can be exported to .csv

Landscape	Order Number	Customer
Ship to name	Primary Qty	Job #
Primary Crew	Ship to Address	Job Status
Export to .csv	Primary Qt Style	Primary Qty Status
Time Slot		

Order Number	Customer Salesperson	Ship To Name Job Number	Primary Qty Primary Qty Style	Time Slot Job Status	Primary Crew Primary Qty
FRIDAY 07/09/10					
A.E. SANDERS CONSTRUCTION, IN			TEMPORARY LINE	MIXED COMPLETED	BOOTH, JAMES CARPET 1 SF
CG001932 NORTHPORT MIKE		TO, SHIP JOB #	CPT-(BASIC)-STRETCH/IN NONE	MIXED START	EVANS, TONY CARPET 336 SF
CG002025 PRELICH, TOM BEN	PRELICH, TOM BEN	5924 LAKE RIDGE AVENUE	PLANK (GLUE) EMPTY DELIVERED	MIXED COMPLETED	NO CREW ASSIGNED WOOD 144 SF
CG002105 SNYDER, CLARICE GORDON	SNYDER, CLARICE GORDON	13173 CENTURY DR	SANFORD SERVICE CO NONE	MIXED COMPLETED	EVANS, TONY SPECIAL SERVICES 1 EA
CL000001 CARPET ONE JEFF THOMPSON		MARSH, GENE & KIM CG903188	CPT-(BASIC)-STRETCH/IN NONE	MIXED COMPLETED	EVANS, TONY CARPET 450 SF

Figure: Sample Report

Job Summary Detailed 4 Telephone 1, Telephone 2, Salesperson, Ship To Address, Primary Quantity Style, Primary Quantity Status, Time Slot and Progress

Can be exported to .csv

Landscape	Order Number	Customer
Ship to name	Primary Qty	Job #
Primary Crew	Ship to Address	Job Status
Export to .csv	Primary Qt Style	Primary Qty Status
Time Slot	Tele 1	Tele 2
Salesperson	Progress	

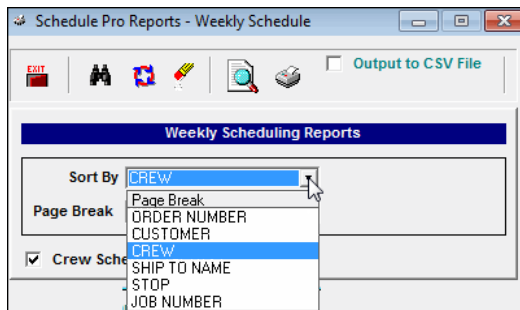
Order Number Telephone 1 Telephone 2	Customer Salesperson Job Number	Ship To Name Ship To Address	Primary Qty Primary Qty Style Primary Qty Status	Primary Crew Time Slot Progress / Job Status
FRIDAY 07/09/10				
256-547-4916	A.E. SANDERS CONSTRUCTION, IN		CARPET 1 SF TEMPORARY LINE	BOOTH, JAMES MIXED DAY 1 OF 1 COMPLETED
CG001932 205-339-7697 205-886-5997	NORTHPORT MIKE JOB #	TO, SHIP 13682 RHANDA PKWY NORTHPORT AL 35475	CARPET 336 SF CPT-(BASIC)-STRETCH/IN NONE	EVANS, TONY MIXED DAY 1 OF 1 START
CG002025 205-752-1253	PRELICH, TOM BEN 5924 LAKE RIDGE AVENUE	PRELICH, TOM 5924 LAKE RIDGE AVE TUSCALOOSA AL 35406	WOOD 144 SF PLANK (GLUE) EMPTY DELIVERED	NO CREW ASSIGNED MIXED DAY 1 OF 1 COMPLETED
CG002105 205-333-6144	SNYDER, CLARICE GORDON 13173 CENTURY DR	SNYDER, CLARICE 13173 CENTURY DR NORTHPORT AL 35475	SPECIAL SERVICES 1 EA SANFORD SERVICE CO NONE	EVANS, TONY MIXED DAY 1 OF 1 COMPLETED
CL000001	CARPET ONE JEFF THOMPSON CG903186	MARSH, GENE & KIM 13666 REJENAL FORREST ROAD NORTHPORT AL 35473	CARPET 450 SF CPT-(BASIC)-STRETCH/IN NONE	EVANS, TONY MIXED DAY 1 OF 1 COMPLETED

Figure: Sample Report

Weekly Scheduling Reports

Schedule Pro>File>Reports>Weekly Scheduling Reports

This report lists the schedule by week for the time frame selected in filters and sorts. If the dates included in the Find range cover multiple weeks, multiple reports will be printed. Use the dropdown arrow to select a sort and a page break.



WEEKLY SCHEDULE FOR CARPET INSTALLATION							
CREW	SUN 05/09/10	MOH 05/10/10	TUES 05/11/10	WED 05/12/10	THURS 05/13/10	FRI 05/14/10	SAT 05/15/10
NO CREW ASSIGNED Phone: Daily Capacity: 0.00	0.00	0.00	0.00	0.00	12345678901234567 8:00 AM- 5:00 PM 5.00	0.00	0.00
13 - THOMPSON, JASON Phone: 205-837-5400 Daily Capacity: 0.00	0.00	0.00	0.00	0.00	CG900017 JONES JOB NUMBER 8:00 AM- 5:00 PM 133.33	0.00	0.00
BRENT SMITH Phone: 205-837-6410 Daily Capacity: 1,000.00	0.00	0.00	CG900013 BF GOODRICH 8:00 AM- 5:00 PM 200.00	0.00	CG900004 SMITH CONSTRUCT 8:00 AM- 5:00 PM 1,000.00	0.00	0.00
SUBCONTRACTOR Phone: Daily Capacity: 1,000.00	0.00	0.00	0.00	0.00	CG900010 SMITH CONSTRUCT 8:00 AM- 5:00 PM 1,133.33	CG000009 NEW CUSTOMER 8:00 AM- 5:00 PM 666.67	0.00
TOM SMITH Phone: Daily Capacity: 1,000.00	0.00	0.00	0.00	0.00	CG900004 SMITH CONSTRUCT 8:00 AM-12:00 PM 1,000.00	0.00	0.00

STORE: ALL STORES
 DEPOT: ALL DEPOTS
 CREW: ALL CREWS
 CUSTOMER: ALL CUSTOMERS
 SALESPERSON: ALL SALESPERSONS
 SHIP TO CITY: ALL CITIES
 05/09/10 TO 05/15/10

Figure: Sample Report



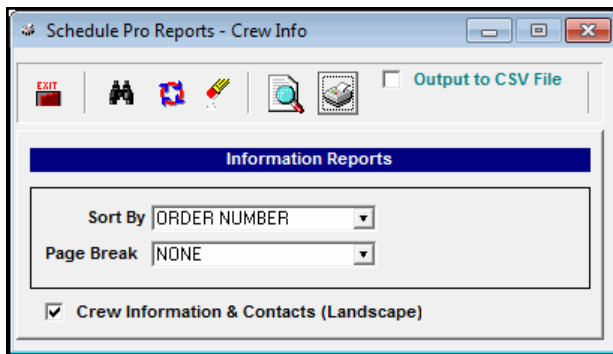
Notes:

The Weekly Scheduling Report is not able to be saved to CSV due to the format of the report.

Crew Information Report

Schedule Pro>File>Reports>Crew Information Report

This report lists crews based on the selected depots. Their contact information is included.



CREW CONTACTS REPORT					DEPOT: ALL DEPOTS
Crew	Crew Description	Telephone 1	Telephone 2	Address	
Installation Depot	Crew Nickname	Description	Description		
19 - THOMPSON, JASON STORE 200 DEPOT		205-807-5400		1212 MAIN AVE TUSCALOOSA AL 35401	
Crew Contacts:					
BRENT SMITH MY DEPOT		205-807-5410		7889 FOXFIRE ROAD TUSCALOOSA AL 35401	
Crew Contacts:					
GONZALES, MICHAEL STORE 200 DEPOT				4500 HITCH RD TUSCALOOSA AL 35401	
Crew Contacts:					
SUBCONTRACTOR MY DEPOT					
Crew Contacts:					
TOM SMITH MY DEPOT				657 OLD FACTORY ROAD TUSCALOOSA AL 35401	
Crew Contacts:					
5/21/2010		DEMO DATA			1

Figure: Sample Report

Totals and Analysis Reports

Schedule Pro>File>Reports>Totals & Analysis Report

Note that only the report is written in teal can be outputted to CSV.

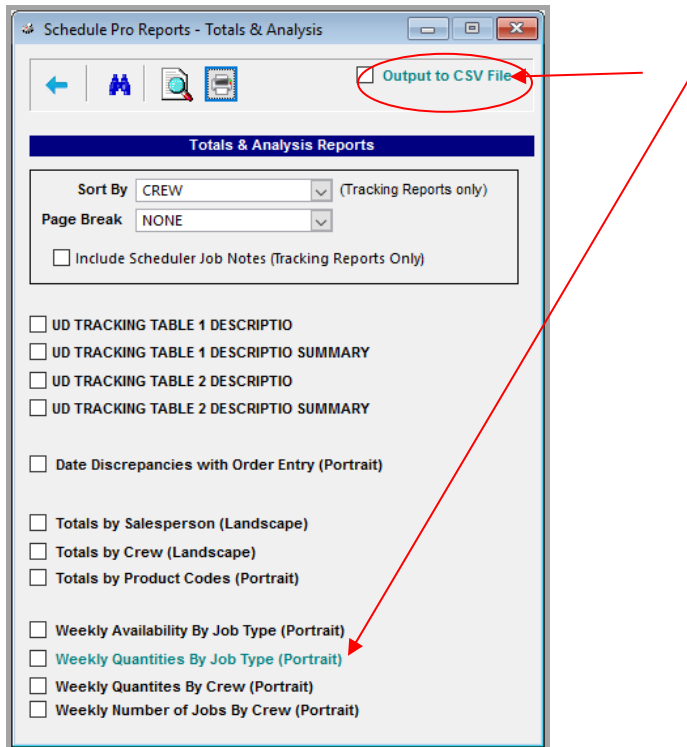


Figure Totals & Analysis screen

Figure: Totals & Analysis Reports Screen

This report has the ability to print the Totals and Weekly reports based on all job lines or on Deduct Capacity Lines only. In either case job lines with a Job Type of "MISCELLANEOUS" will not be included

Tracking Table 1/Tracking Table 2

The labels for these tables are set in [System Settings](#).

Full Report

Subtotals by each value for the tracking table, gives a count and percentage with job details.

TRACKING TABLE 2 REPORT							STORE: ALL STORES
							DEPOT: ALL DEPOTS
							CREW: ALL CREWS
							JOB TYPE: ALL JOB TYPES
							CUSTOMER: ALL CUSTOMERS
							SALESPERSON: ALL SALESPERSONS
							SHIP TO CITY: ALL CITIES
							DATE: 07/09/10 to 07/09/10
Order Number	Customer Salesperson	Ship To Name Job Number	Ship To Address	Primary Crew	Install Date Job Status	TRACKING TABLE 2	
	A.E. SANDERS CONSTRUCTION, I			BOOTH, JAMES	07/09/10 COMPLETED	ALTERNATE-APARTMENTS	
CG001986	MORROW CONSTRUCTION GORDON	CANTEBURY APTS CANTEBURY-FIRST FLOOR COM	FIRST FLOOR COMMON AREAS GREENSBORO AL 36744	EVANS, TONY	07/09/10 COMPLETED	ALTERNATE-APARTMENTS	
CG002105	SNYDER, CLARICE GORDON	SNYDER, CLARICE 13173 CENTURY DR	13173 CENTURY DR NORTHPORT AL 35475	EVANS, TONY	07/09/10 COMPLETED	ALTERNATE-APARTMENTS	
						Count: 3 of 6 Percentage 50.0%	
CG001932	NORTHPORT MIKE	TO, SHIP JOB #	13682 RHANDA PKWY NORTHPORT AL 35475	EVANS, TONY	07/09/10 START	ALTERNATE-COMMERCIAL	
CG002025	PRELICH, TOM BEN	PRELICH, TOM 5924 LAKE RIDGE AVENUE	5924 LAKE RIDGE AVE TUSCALOOSA AL 35406	NO CREW ASSIGNED	07/09/10 COMPLETED	ALTERNATE-COMMERCIAL	
CL000001	CARPET ONE JEFF THOMPSON	MARSH, GENE & KIM C6903186	13566 REJENAL FORREST ROAD NORTHPORT AL 35473	EVANS, TONY	07/09/10 COMPLETED	ALTERNATE-COMMERCIAL	
						Count: 3 of 6 Percentage 50.0%	

Figure: Sample Report

Summary

Subtotals by each value for the tracking table, gives a count and percentage only.

TRACKING TABLE 2		
ALTERNATE-APARTMENTS	Count: 3 of 6	Percentage 50.0%
ALTERNATE-COMMERCIAL	Count: 3 of 6	Percentage 50.0%

Figure: Sample Report

Date Discrepancies with Order Entry

This is a report of jobs where the scheduled date and the order entry estimated delivery date do not match. It is sorted by the estimated delivery date with those with no date listed first.

<u>ORDER ENTRY EST DEL DATE VS SCHEDULED JOBS DISCREPANCY REP</u>						
						STORE: ALL STORES
						CUSTOMER: ALL CUSTOMERS
						SALESPERSON: ALL SALESPERSONS
						DATE: 01/01/10 to 07/09/10
						SHIP TO CITY: ALL CITIES
Order #	Store	Customer	Ship To Name	Job Number	Scheduled Start Date	
ORDER ENTRY EST DEL DAT						
CG001548	" "	KEELING, TODD	KEELING, TODD	2011 VETERAN'S MEMORIAL PKWY	02/21/10	
CG001594	" "	BLACKWOOD, RAY	SINGH	661 HELEN KELLER BLVD	03/13/10	
ORDER ENTRY EST DEL DAT 01/13/10						
CG903186	" "	RUST, RYAN & SUMMER	RUST, RYAN & SUMMER	1697 ARBOR WAY DRIVE	01/14/10	
CG903186	" "	RUST, RYAN & SUMMER	RUST, RYAN & SUMMER	1697 ARBOR WAY DRIVE	01/13/10	
CG903186	" "	RUST, RYAN & SUMMER	RUST, RYAN & SUMMER	1697 ARBOR WAY DRIVE	01/13/10	

Figure: Sample Report

Totals By Salesperson

This report gives a tally of the job types by salesperson for the parameters chosen in filters and sorts.

<u>QUANTITY TOTALS BY SALESPERSON</u>										
										STORE: ALL STORES
										DEPOT: ALL DEPOTS
										CREW: ALL CREWS
										JOB TYPE: ALL JOB TYPES
										CUSTOMER: ALL CUSTOMERS
										SALESPERSON: ALL SALESPERSONS
										SHIP TO CITY: ALL CITIES
										DATE: 07/01/10 to 07/30/10
Salesperson	CARPET	WOOD	VINYL	VCT	LAMINATES	CERAMIC	TAKE UP CARPET	TAKE UP WOOD	TAKE UP VINYL	SPECIAL SERVICES
	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
BEN	0.00	144.00	0.00	0.00	0.00	0.00	141.00	0.00	0.00	1.00
GORDON	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
JEFF THOMPSON	450.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
MIKE	336.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
	788.00	144.00	0.00	0.00	0.00	0.00	141.00	0.00	0.00	3.00

Figure: Sample Report

Totals by Crew

This report was added in version 10.5.6

This report can be printed by any selected date range. It will print the Total Number of Jobs and Job Type Quantities by Crew.

WEEKLY QTY TOTALS FOR CARPET SF								STORE: ALL STORES
								DEPOT: ALL DEPOTS
								CREW: ALL CREWS
								CUSTOMER: ALL CUSTOMERS
								SALESPERSON: ALL SALESPERSONS
								SHIP TO CITY: ALL CITIES
								DATE: 07/04/10 TO 07/10/10
CREW	SUN	MON	TUES	WED	THURS	FRI	SAT	TOTALS
BOOTH, JAMES	0.00	0.00	0.00	0.00	0.00	1.00	0.00	1.00
EVANS, TONY	0.00	0.00	0.00	0.00	0.00	450.00	0.00	450.00
SLEDGE, GLENN	0.00	0.00	0.00	0.00	0.00	336.00	0.00	336.00
TOTALS	0.00	0.00	0.00	0.00	0.00	787.00	0.00	787.00

Figure: Sample Report

Weekly Number of Jobs by Crew

This series of reports summarizes the number of jobs scheduled per crew and per week for the parameters chosen in filters and sorts. One report per Job Type is given.

WEEKLY NUMBER OF JOBS FOR CARPET SF								STORE: ALL STORES
								DEPOT: ALL DEPOTS
								CREW: ALL CREWS
								CUSTOMER: ALL CUSTOMERS
								SALESPERSON: ALL SALESPERSONS
								SHIP TO CITY: ALL CITIES
								DATE: 07/04/10 TO 07/10/10
CREW	SUN	MON	TUES	WED	THURS	FRI	SAT	TOTALS
BOOTH, JAMES	0	0	0	0	0	1	1	2
EVANS, TONY	0	0	0	0	0	1	1	2
SLEDGE, GLENN	0	0	0	0	0	2	2	4
TOTALS	0	0	0	0	0	4	4	8

Figure: Sample Report

References

Understanding Schedule Pro

Jobs

A group of lines scheduled to be completed at the same time. Can be all or part of an RFMS customer order, claim or temporary job.

Header

Information about the job, some of which can be edited manually for tracking and reporting purposes. Crews and Scheduled start and end dates should not be edited here.

Lines

Individual material and service lines which make up the job

Crew

An installer or group of installers who perform a job.

Depot

A way of grouping crews.

Color	Description	Crew Name	Line Status	Units	Qty	Date	Start Time	End Time	Actual Qty	Date	Start Time	End Time
	BOCCOLATI	BOOTH, JAM	RESERVED	SF	11.00	05/02/13	8:00 AM	5:00 PM	0.00			
		BOOTH, JAM	CUT				8:00 AM	5:00 PM	0.00			

3 Ways to Schedule Jobs

Set Alert for Order to be scheduled through a Centralized Alerting System Schedule Job for Created Alert and Establish Specifics

- Select Dates and Time
- Select Tracking Information
- Select Crew
- Add to Calendar

Manually Schedule Order to Provide for more Focused Control

- Select Order to be Scheduled from Calendar
- Tag Lines to be Scheduled for Installation
- Check Installation Availability for Selected Date
- Select Date, Time, and Crew for Job
- Add to Calendar

Temporarily Schedule Order to Reserve Future Installation Dates (Soft Schedule)

- Enter Job Information for Customer Without an Order Being Created
- Create Temporary Line(s) Indicating the Job Type and Estimated Quantity
- Associate Actual Order with Temporary Order Once Created
- Locate Actual Order and Tag Appropriate Lines
- “Send Over RFMS Order and Lines to Schedule Job”
- Save Job

Schedule Pro Work Flow

SCHEDULE JOB

- 1- Alert Set for Requested Installation Date (Est Del Date or Line Est Del Date)
 - a. Multiple Schedule Dates- Internal Notes indicate what dates for each phase
- 2- Job put on schedule based on date requested,
 - a. IF material line(s) from Order Entry in GEN PO status the Schedule Pro default status should be left as **SCHEDULE REQUESTED**
- 3- Once or twice a day filter scheduled jobs by "Schedule Requested" Status.
 - a. Review line statuses to see updated line status from Gen PO to On Order.
 - b. Review the **Promise Date** for the material to confirm meets 2 day prior to installation date deadline.
- 4- Contact customer to confirm the installation date desired.
 - a. Review any details of installation as needed
 - b. Email client reminder of installation appointment as well as documents to review prior to installation ("How to prepare for your floor covering installation" etc.)
- 5- Change Schedule Pro Status to **SCHEDULED**

GET READY FOR INSTALL

- 6- Material Status Report generated to track materials 2-3 Days prior to installation date
- 7- Call customer to confirm installation 24 hours prior to installation.
 - a. Discuss normal installation preparation for the type of job being installed.
 - b. Review the scheduled job for any extraordinary things the client was supposed to perform, usually indicated with a service line indicating what is their responsibility (client to remove existing material or client to remove and replace furniture, etc.). Confirm the client has completed the necessary work and is ready for installation
 - c. Discuss balance due and review policy regarding collecting COD
 - d. Make notes of the conversation in Scheduler Notes section
- 8- Change status to **CONFIRMED**
- 9- Generate Installation Job Packet
 - a. Work Order for customer sign off
 - b. Work Ticket for installer's copy
 - c. Tag jobs for Installer to generate Map. (if multiple jobs being performed during a day from one jobsite to the next)
 - d. Print Diagram (Open scheduled job- click on View Order- Open attachments- find diagram and print)
- 10- Add additional flags in Tracking Table Notes 1 (Material pick up, Material Not Ready etc.)

SPECIAL NOTE: Additional Charges

Additional Charges phoned in throughout the day should be added to the schedule and a Work Ticket generated in advance to check the installer back in with a document that has already been prepared.

DISPATCH CREWS

- 11- Print Grid as a guideline to expedite loading crews
- 12- Collect PREVIOUS job's work orders, work tickets, COD's prior to releasing NEW installation job packet
 - a. Note material changes on Work Ticket/Pick Ticket
 - b. Note job site changes on Work Ticket (job not ready, reschedule, inspect, etc.)
 - c. Additional Work Tickets prepared given to installer for review and sign off

UPDATE SCHEDULE/ORDERS

- 13- Collate Work Tickets/Install Bills into two categories
 - a. Work Tickets-NO Changes
 - b. Work Tickets- WITH Changes
- 14- Go to Quick Edit to Update Statuses
 - a. Change today's jobs status to **IN PROGRESS**
 - b. Change jobs turned in status as needed (**PHASE COMPLETE, JOB COMPLETE**, Reschedule, and Inspect etc.)
 - c. Add Tracking Table Follow up as needed (Installer Bill Needed, Repair Needed, Change Order Pending)
- 15- Providers Earnings Posted
 - a. Filter by Status if required for job completion to be confirmed prior to earnings being posted. (Phase Complete and Job Complete)
 - b. Post Earnings for Work Tickets with NO Changes
 - c. Post Earnings for Work Tickets WITH Changes
 - **ONLY** if access to Order Entry is available to make necessary corrections (Since additional charges should be added while installation is still being performed the only changes that would be necessary would be to reduce qty, rate due to job site difficulties)

Tab Capacity Calculations

Using Automatically Calculate based on line quantities.

Crew Assigned

Line item material type units / Line item material type line item crew daily quantity

Crew Unassigned – same tab

Line item material type units (a) / total depot quantity for line item material type for day (b1) / total depot crews for line item material type for day (b2)

Crew Unassigned – different tab

Line item material type units (a) / total depot quantity for line item material type for day (b1) / total depot crews for line item material type for day (b2) * total depot quantity of tab material type that also installs the line material type (e) / total depot quantity of tab material type for the day (f)

Qty Assigned

Line item material type units / Line item crew line item material type daily quantity * line item crew tab material type daily quantity

Qty Unassigned

$a/b1/b2 * c/d * e/f$

a = line item units

b1 = total quantity for line item material type for depot

b2 = total number of crews for line item material type for depot

c = total depot quantity for tab material type for day

d = total depot crews for tab material type for day

e = total depot quantity of tab material type that also installs the line material type

f = total depot quantity of tab material type for the day

FAQ

Can I have people in just to look at the schedule?

Yes, Read-Only users do not count toward the Schedule Pro user count. That count is only for active simultaneous users. Opening Schedule Pro in Read Only Mode from Order Entry - will open View Schedule Jobs and display related jobs if scheduled jobs exist. [Click here for details.](#)

Is it possible to condense the grid down to fit more jobs on the screen?

Yes, it is! The “simple” grid view allows the users to see the grid with one line per job, rather than five. This grid also has a few enhanced features, such as a “Right Click” menu to edit jobs or view more information, and a Search feature. [Click here for details.](#)

If a job is split over multiple days, does a provider records for each day of the job need to be added?

No! Go to *Utilities>System Options>Schedule Pro>Providers> Combine Split Lines Display on Last Install Date and* set it to yes. Also, the “Work Ticket” in schedule pro can now do the reverse, and combine split lines all on the first day of the job, using a checkbox in the Print Preview menu.

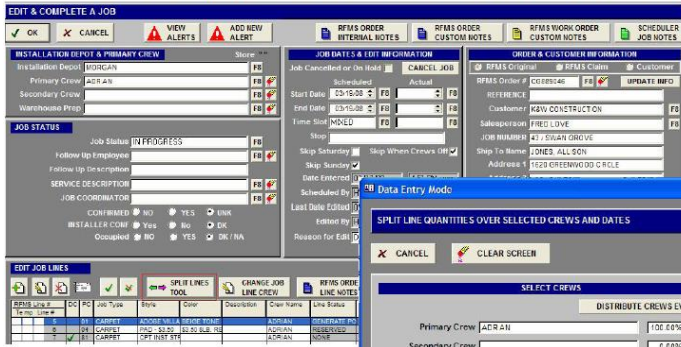
Is it possible to just schedule from the grid?

To some degree; go to the grid, and select a Date and a Crew, and click in the corresponding box, then click the **insert** button to add a job, that Date & Crew will be pulled up in the Schedule New Jobs screen. Now, add the job, tag lines, choose a time slot, and click “Add” to schedule.

How can the number of days on a job be changed?

It is not a good idea just to change the “End Date” of the job. This doesn’t affect the actual line quantities, thus it doesn’t affect the “Deducting of capacities” from crews or depots. It is best to use the “Split Lines” tool to add more days to a job, or reduce the number of days on a job. First, schedule a job initially for the number of days to allow using the Number of Days field on the Schedule New Jobs screen.

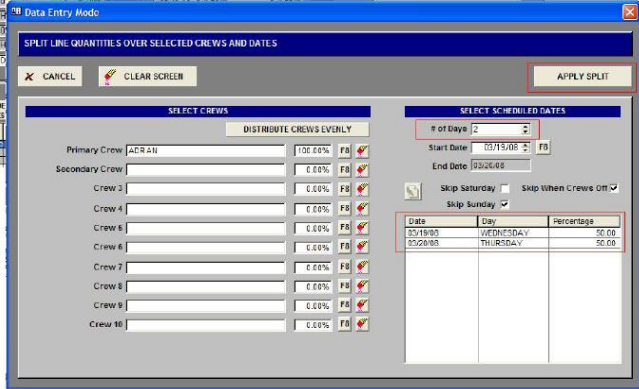
Use the “split lines tool” to edit the number of days, or add more crews



Open in Edit & Complete, then hit the “Split Lines Tool” button.

In the Split Lines screen, edit the number of days for the job, verify the percentages, and hit “Apply Split.”

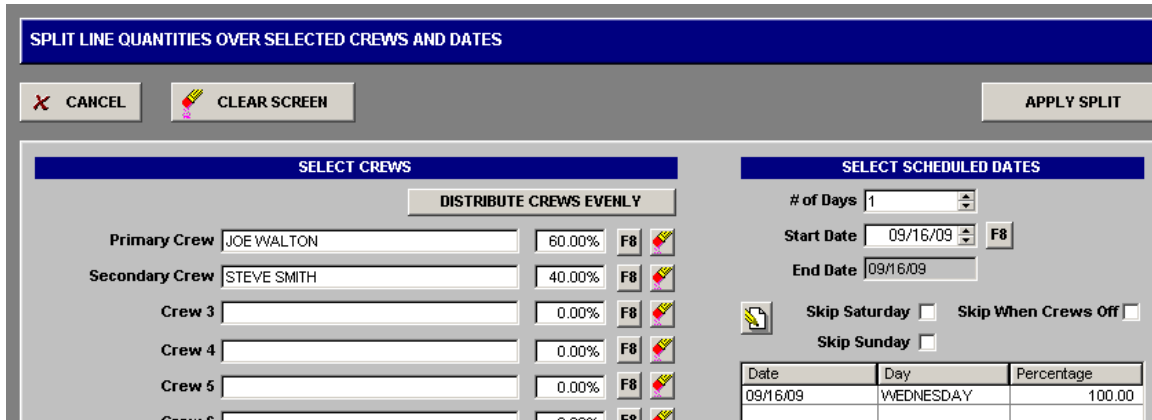
(Note: Additional Crews can be added using the fields on the left.)



How can a job be split between multiple crews?

This is very similar to the “changing of number of days” described above. First, schedule the job. Then, **double-click** the job to open in the “**Edit & Complete**” screen. Then, click the “**Split Lines**” tool. (NOTE: If a “Secondary Crew” is added without splitting the lines, it will not show on the grid or many of the reports for that secondary crew.)


In the Split Lines screen, up to 10 total crews can be added, and assign a percentage of the overall quantity of the job to each. The percentages must add up to 100.



Then, click “Apply Split” to affect the change, and save the job as normal.

How can the material status for upcoming jobs be checked?

Print the Material Status report, using the settings here:



Reports: Check Material Status for Scheduled Jobs

Set Date Range & other generic filters in the top filter box.

Check boxes for Rolls and Items, Deduct Capacity and Non Deduct Capacity, as you wish. This example will check all material lines.

Check the boxes for the status' you wish to flag: usually *On Order, Gen PO, and None*.

Check the box for the desired report, & hit Print or Preview.

REPORTS

FILTERS & SORTS

Follow Up Employee >>> [F8] All Store >>> [F8] All
 SERVICE DESCRIPTION [F8] All Depot >>> [F8] All
 JOB COORDINATOR [F8] All Line Crew >>> [F8] All
 Job Type >>> [F8] All
 Customer >>> [F8] All
 Salesperson >>> [F8] All
 Ship To City >>> [F8] All

Print for Install Date(s)
 Specific Range
 Start Date [03/10/08] [F8]
 End Date [04/01/08] [F8]
 Sort By >>> [ORDER NUMBER] Job Status >>> [ALL]

DAILY SCHEDULING REPORTS - PRINT INDIVIDUAL JOB LINES
 Page Break [SALESPERSON] Include Scheduler Job Notes
 Include Scheduler Line Notes
 Include Crew Contacts

Show Lines	Deduct Capacity Lines	Non Deduct Capacity Lines	Miscellaneous Lines
Roll Goods <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Items <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Services <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Temporary <input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Schedule By Date (Landscape) Schedule By Date (Portrait)
 Schedule By Date/Time (Landscape) Schedule By Date/Time (Portrait)
 Schedule By Crew (Landscape) Schedule By Crew (Portrait)
 Schedule by Order (Landscape) Schedule by Order (Portrait)
 Jobs Edited (Landscape) [TODAY]

JOB SUMMARY SCHEDULING REPORTS
 Page Break [STORE] Include Scheduler Job Notes
 Include Crew Contacts
 Job Summary 1 (Portrait - Single Line)
 Job Summary 2 (Portrait - Single Line)
 Job Summary 3 (Portrait)
 Job Summary Detailed 1 (Landscape)
 Job Summary Detailed 2 (Landscape Legal)
 Job Summary Detailed 3 (Landscape)
 Job Summary Detailed 4 (Landscape)
WEEKLY SCHEDULING REPORTS
 Page Break [NONE] Crew Schedule (Portrait)
INFORMATION REPORTS
 Page Break [NONE] Crew Information & Contacts (Landscape)

TOTALS & ANALYSIS REPORTS
 Page Break [CREW] Include Scheduler Job Notes (Tracking)
 SERVICE DESCRIPTION Summary
 JOB COORDINATOR Summary
 Date Discrepancies with Order Entry (Portrait)
 Totals by Salesperson (Landscape)
 Totals by Product Codes (Portrait)
 ALL
 Weekly Availability By Job Type (Portrait)
 Weekly Quantities By Job Type (Portrait)
 Weekly Quantities By Crew (Portrait)
 Weekly Number of Jobs By Crew (Portrait)

Filter Material Status by Supplier >>> [F8]
 Print For Status: On Order - All On Order - Promise Date Conflicts
 Gen PO None Cut Reserved Delivered Job Costed
 Material Status (Landscape)
 Material Status with PO Information (Landscape)
 Provider Records Status (Landscape) [ALL]

How much work can be done?

By Crew:

On the crew set up screen, enter the amount of each job type a crew can do in one day. This is helpful when scheduling to know if a job will take a crew a single or multiple days.

Job Type	Units	Daily Qty Limit	Max Jobs Per Day	Skill
CARPET	SF	1,000.00	0.0	
CERAMIC	SF	350.00	0.0	BASI
DELIVERY	EA	0.00	0.0	
EXPEDITING	EA	0.00	0.0	
LAMINATES	SF	0.00	0.0	
MEASURE	EA	0.00	6.0	

Where can I find this information?

On the Select Crew to Schedule Screen, there are several indicators of a crew's availability.

1. The dot next to their name.
2. The amounts in the crew capacity levels section.
3. The details of these capacity levels scheduled are found in the Job lines scheduled section.

4. The system can be set to give warnings when crews are overbooked.

Select Crew to Schedule

Crew Name | Date | 07/20/12 | Friday | F8 | All Crews for Depot | All Depots

Search Crew Name |

Crew Name	Crew Description	Crew Nickname	Crew City	Telephone 1	Depot Name	Sun	Mon	Tue	Wed	Thr	Fri	Sat
AARON, CEDRIC			TUSCALOOSA		N HOUSE		✓	✓	✓	✓	✓	0
ALLEN, JASON	GENERAL	JASON		205-333-4444	NORTHPORT		✓	✓	✓	✓	✓	0

CREW CAPACITY LEVELS

Job Type	Units	Daily Qty Limit	Qty Scheduled	Skill Level
CARPET	SF	1,000.00	850.00	
CERAMIC	SF	350.00	0.00	BASIC

JOB LINES SCHEDULED

Store	RFMS Order #	Reference	Customer	Job Type	Style	Scheduled Units	Units
			TEST CREW TYPE	CARPET		850.00	SF

The indicator dots can also be seen on the weekly grid.

RFMS Schedule Pro for DEMONSTRATION COMPANY - [Weekly Grid]

Select Information to View in Grid

Line 1: ORDER NUMBER OR REFERENCE | Line 4: CUSTOMER ADDRESS | Show Jobs / Crews: CREW ASSIGNED / SCHEDULED CREWS ONLY

Line 2: CUSTOMER NAME | Line 5: WORK PHONE | Deduct Capacity Lines Only:

Line 3: REFERENCE | FILTER INACTIVE

Crew Name	Sunday 08/20/10	Monday 08/23/10	Tuesday 08/24/10	Wednesday 08/25/10	Thursday 08/26/10	Friday 08/27/10	Saturday 08/28/10
BOOTH, JAMES			CG002054 HARRP, RICK & VICKIE	CG001926 MATTIE LEE			
EVANS, TONY			1815 RECREATION AREA 205-593-4888 CG000349 DUNCAN, TOM	1700 DAVID CAMPBELL RD 205-271-4605 CG000939 TAMARACK HOMES CPT HONV.FRP.TUBDECK 4100 HWY 69 NORTH 205-333-0445	CG001982 GADDY, STACY	CG001982 GADDY, STACY	
EVANS, TONY			1426 PLANTATION LANE 205-343-1912		4109 43RD STREET	4109 43RD STREET	
SLEDGE, GLENN			CG001766 KATZ, RICHARD	CG002062 BANKS, JERRY	CG002062 BANKS, JERRY	CG001989 WEISBERG, ROBERTA 330 RIVERDALE DR 205-798-2489	
WILLIAMS, DAVID			1001 LAKESIDE PLACE 205-210-1244	4909 CREEKWOOD DR 205-556-1238 CG002067 ACCOUNTS PAYABLE, UNI PO974087 BOX 870137 205-344-2998	4909 CREEKWOOD DR 205-556-1238 CG002068 ACCOUNTS PAYABLE, UNI PO974088 BOX 870137 205-344-2998		
WILLIAMS, DEVAYNE				CG001467 K & A BUILDERS INC. ORDER THIS INCLUDES AL 2420 12TH STREET 205-349-3126	CG001467 K & A BUILDERS INC. ORDER THIS INCLUDES AL 2420 12TH STREET 205-349-3126	CG001467 K & A BUILDERS INC. ORDER THIS INCLUDES AL 2420 12TH STREET 205-349-3126	

Scheduling Warning Messages

Crew Required Restrict Warning No Message

Job must be Scheduled to the Primary or Secondary Depot for the Order Store Code Restrict Warning No Message

Exceed Maximum Jobs per Day per Crew Restrict Warning No Message

Crew Does Not Work on Scheduled Day Restrict Warning No Message

Installation Depot Overbooked for Day Restrict Warning No Message

Crew Overbooked for Day Restrict Warning No Message

Figure: Crew Capacity Related Warnings

By Depot:

Each crew is assigned to a depot. The daily quantities for all the crews add up the depot capacity. Depot capacities are helpful in determining if outside crews might be needed or to advise the sales staff that installation times may be further out than normally expected. Look at trends to see if crews need to be redistributed between depots.

Where can I find this information?

The percentage of depot availability by Job Type is shown on the calendar portion of the **Schedule New Job Screen**. Click on the depot name at the bottom to switch between depots.

Quantity Available - %						
ALL CREWS	CARPET	WOOD	VINYL	VCT	LAMINATES	
Sun	Mon	Tues	Wed	Thurs	Fri	Sat
2012	Jul 2	Jul 3	Jul 4	Jul 5	Jul 6	Jul 7
0	100	100	100	100	100	100
Jul 8	Jul 9	Jul 10	Jul 11	Jul 12	Jul 13	Jul 14
0	100	100	100	100	100	100
Jul 15	Jul 16	Jul 17	Jul 18	Jul 19	Jul 20	Jul 21
0	100	100	97	100	100	100
Jul 22	Jul 23	Jul 24	Jul 25	Jul 26	Jul 27	Jul 28
0	100	100	100	100	100	100

NORTHPORT TUSCALOOSA

Trouble Shooting

Provider records are not being created.

- Is the crew marked inactive in Human Resources or Accounts Payable>Suppliers?

Lines on the job are not showing up in schedule pro.

- Has the product code been associated with a job type? [Click here for details.](#)

The ending date was changed in schedule pro, but it still shows on only one day.

- The dates must be split on the lines not on the header of the job.

A secondary crew was added in schedule pro, but it still shows scheduled to one crew.

- The job must be split between crews on the lines not on the header of the job.

Completed jobs are not showing on the Create Provider Screen.

- Have service lines been completed?

Internal Warning Messages

Message	Description	Level when scheduling new job	Level when editing existing job
Customer Name or Order Must be selected	An existing customer order or customer name must be added to each job	Restrict	Restrict
Line(existing or temporary) must be present	a line on a customer order must be tagged or a temporary line must be entered	Restrict	NA
Appropriate Dates	The scheduled dates must be logical	Restrict	Restrict
Multiple Day % must add up to 100 %	Total for all days must equal 100%	Restrict	NA
Crew Installs all job types	When assigning a crew to a job, the crew must be setup to install the job type of the line items	Restrict	Restrict
RFMS line item unit type conflicts with job type unit type	The unit of measure on the customer order line is compared with the unit of measure selected when setting up the job types.	Restrict	