

BUSINESS  
MANAGEMENT  
SOFTWARE



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## 10.3 FEATURES AND ENHANCEMENTS

Before you download Version 10.3, you'd might like to know what features and enhancements are available in the release. The following outlines the new features, why you would need them and how to use them.

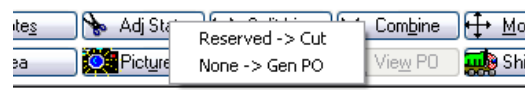
### Store Code - Change Invoice Pre-fix

Now in Order Entry, by Store Code, you can change the Computer Generated prefixes of your invoice numbers, quotes and estimates. This does not affect any previous invoices.

1. Click File, Stores.
2. Select the store for which you wish to make changes.
3. Notice at the bottom of the screen there is a section called Store Prefixes. There are subsections beneath that. There are subsections for Order Entry, Quotes and Bidpro. If you wish to change the 2 digit prefix select the checkbox located next to module you want to change.
4. After doing so, for the store code you changed, all future Computer Generated Invoices, Quotes or Estimates will display with the prefix you have added as opposed to CG, ES, or JE, which are default with the RFMS system.
5. Once you have changed invoice prefixes for a particular store, the Public Parameter switch, **Sequence Number by Store** is no longer available.

### Line Status Adjustments

The Cut Lines icon has now been replaced or renamed to "Adj Status" with added functionality. Now instead of just changing the selected lines from "Reserved" to "Cut", you can also change lines from "None" to "Gen PO".



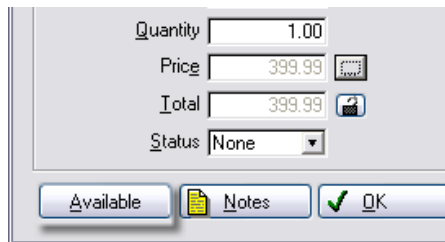
# Features...and Enhancements

## Line Status Adjustment cont.

This feature will allow you to select multiple lines and adjust the status as it always has (from "Reserve" to "Cut") but for orders being exported from Quotes or Measure that start out in a "None" status those lines can be tagged and changed to "Gen PO" status. For instance, if you have 3 lines that need to be changed from "Reserved" to "Cut", you can do this by clicking the Adjust Status button. All lines in a "Reserved" status will be automatically tagged and you can click the select button to change all statuses on the customer order line. Likewise, if the order had lines in a "None" status, by clicking on "None to Gen PO" option all lines in a "None" status are tagged and will be changed to "Gen PO" status. You can un-tag any lines that you do not want to change.

## Available Inventory - Item Inventory

This button allows you to access inventory amounts from Order Entry on unreferenced lines. When creating an Order Line, if the Line is for an Item, unreferenced ("None" status), and has an Item Number, Item Name and Description, a new button will display. The Item Number and Name and Description must be the same as the Inventory record or this feature will not work.



Quantity	1.00
Price	399.99
Total	399.99
Status	None

Buttons: Available, Notes, OK

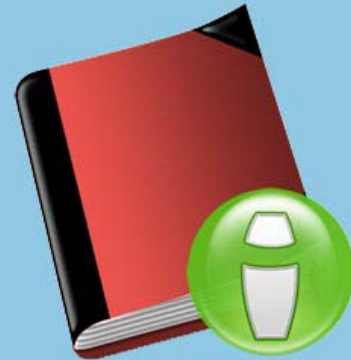
This feature can be used for materials that will be allocated at the time it is pulled or picked. Reserving a specific inventory record is not appropriate but knowing inventory availability is crucial in processing the order. For example, if you have several items that have the same Item Number but different colors or descriptions, you can use this feature in Order Entry to quickly determine what is available in a specific color/description rather than sort through your entire item record list. The system will look at every order with matching inventory specifications in a NONE or Soft Reserves status.

## GST Taxes

This feature is applicable to all Australian and New Zealand clients. GST stands for Good and Services Taxes and RFMS now accommodates this tax process. The appropriate tax percentage is set up and it will be reflected in the order total once you have set this option up in RFMS Order Entry. In order for the job to reflect the net gross profit after GST, an allowance must be made in the selling price to include GST owed.

## Export PO Notes to A/P when Costing Inventory

Click Utilities, Parameters, Public Parameters. This switch, if selected, allows you to export PO notes to the Accounts Payable record when material listed on the PO is costed. If you receive inventory and cost at the same time, any PO notes will export as well.



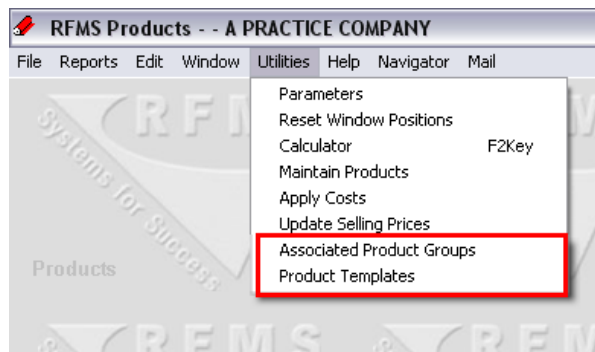
# Features...and Enhancements



## Product Bundling

Now in RFMS Products you have the ability to create product bundles, thus making it easier in Order Entry to create orders for these products. Product Bundling is basically creating product groups in your Products module of certain material that you may frequently sell together. For instance, you may have a hardwood order that needs to be completed. This order may include a product called Beautiful Wood, color Maple. Each time you use this specific product, there will be specific matching trim pieces that you need to include. It is possible you will use a specific glue as well. You can use this product grouping system to create a specific "bundle" including all these specific products. When doing so, in Order Entry, the person who is entering the order can quickly and easily import the bundle and adjust quantities appropriately. A separate line will be created for each material in the bundle.

In addition to specific bundling, you can also use a generic bundling system. This allows you to create a template in products that can be imported into Order Entry. This template will create a material line for each roll or item included in the bundle but without using specific products. This allows you to select the appropriate product and quantity in Order Entry.



## Merge Products

This feature allows you to merge two product records together. It is available on the Roll and/or Item Products screen. Use this feature if you have more than one product record for the same product. If, for instance, you use a product importer to bring in information into your products file, there may be discrepancies in products you have manually entered as opposed to products that have been imported that may result in more than one record for a particular product. In that case, you may use this feature to merge these records together.



# Features...and Enhancements

## Enhanced Revenue Recognition

Enhanced Revenue Recognition is a feature in RFMS designed to allow you more detail in your journal. It utilizes new Standard Account Codes for enhanced journal reporting. This feature breaks apart the journal summary reports for A/R, A/P, Customer Deposits, Sales, Cost of Sales and Inventory into a detailed listing that shows when specific transactions are made. Use this feature if you have a need for a more detailed journal listing than what RFMS currently provides or if you have a need for Work In Progress tracking through the journal.

There are numerous procedural changes that take place when using ERRM. **Note that this feature is not automatically activated when you install 10.3. You must contact RFMS for a access code to turn this feature on. Please be advised by carefully reading the help files and the ERRM checklist before selecting this as your system of accounting because this is a permanent system change. Four hours of training is required before an access code will be given to you. Contact RFMS Training Department for details.**

## New Standard Account Codes

If you opt to use Enhanced Revenue Recognition, there will be several new Standard Account Codes added to the system. Listed below are all new account codes and they account type (asset, liability, etc). You will need to associate the appropriate account code from your Chart of Accounts with the newly added Standard Account Codes below.

### New Account Code

### Type of Account Code

Inventory In Uncosted	Asset
Accrued Inventory for Costing	Liability
Work in Process Material	Asset
Work in Process Labor	Asset
Accrued Labor	Liability
A/R Unbilled	Asset
Cost of Labor	Cost of Goods Sold
Receipts Not Deposited	Asset



# Educational... Opportunities



Since we began offering our web-based classes, we've had a lot of questions and gotten a great deal of feedback. I would like to take this opportunity to let you know how our new training programs are set up.

Previously, training was purchased in a block of time. When you purchased the system initially, you may have bought 3 days of onsite training and 10 to 20 hours worth of eLearning and our trainer typically relied on you to direct their efforts. As we have learned from many of our clients, they would like to have a more structured training process, also.

Accordingly, we have introduced some specific RFMS University formats:

**eLecture** - eLecture utilizes the latest innovations in web training events to train as many people as possible at one time on courses selected from the [RFMS University Course Catalog](#). These lectures are scheduled in advance and can be registered through the [RFMS University Schedule](#). The eLecture is conducted with only the instructors having speaking capabilities. Attendees can submit limited questions electronically during the lecture. Extensive course literature is included and a recorded version of the event is typically available 24 hours after the event. These classes are highly affordable with most costing less than \$25 per course hour.

**eClassroom** - eClassroom utilizes the same technology and course selections as the eLecture format but are conducted on a smaller scale. Attendees can interact with the instructors and the instructors work to make sure all questions are followed up. Typically, classes are limited to less than 30 attendees. Extensive course literature is included and a recorded version of the event is typically available 24 hours after the event. The classes are scheduled in advance and can be registered through the [RFMS University Schedule](#). These classes are very affordable with most costing less than \$50 per course hour.

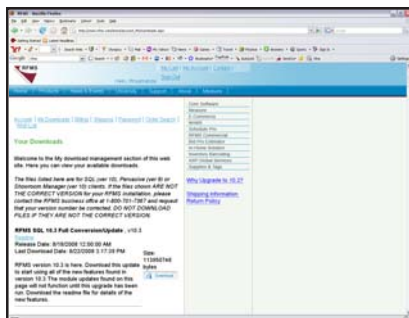
**eConsulting** - eConsulting is the classic online training many of you have already experienced. This can be directed by you, or you can choose from any of our predefined courses in the [RFMS University Course Catalog](#). eConsulting is scheduled at your convenience and is typically a one-on-one training event. If you've seen a course in the catalog that hasn't been offered in eLecture or eClassroom and would be interested in taking the class, visit <http://www.rfms.com/University/eConsultingSchedule.aspx> and set the class up immediately. eConsulting is billed at an hourly based on the certification level of the consultant required for the consultation.

**Travel vs. Online** - All of these classes can be taught online or at your facility. We've been getting consistent information from our clients that the economy is pressuring everyone to economize and based on that feedback, we've focused a great deal of our effort on promoting Internet based training. However, if it better suits your business needs, we will come onsite and work with you face-to-face. Onsite rates are billed hourly based on the certification level of the consultant required. One-half of the hourly consulting rate will be charged for the time to travel onsite. To arrange onsite training, contact [training@rfms.com](mailto:training@rfms.com).

Please send any questions or comments directly to me at [wshank@rfms.com](mailto:wshank@rfms.com). Your feedback keeps us on the cutting edge.

Thank you very much for your time and attention, Wes Shank, CFE Director of Continuing Education RFMS, Inc.

# RFMS.. Software Downloads



When you log in to the website, click on the link labeled Program Updates. All software updates that you have purchased will be available for download.

The 10.3 Conversion update will be the first file on the list if you are currently running SQL. (If you are running 9.6 and wish to upgrade, you will need to log a call with our Technical Support department.

To upgrade from 10.3, run the 10.3 Conversion update before downloading any product module updates).



## B2B SUPPLIER LIST



Over 500 Users  
Currently Enrolled

### Active (20):

- Shaw
- Mohawk
- Beaulieu
- Ohio Valley
- WM Bird
- All Tile
- Adleta
- JJ Haines
- Florstar
- Dal Tile
- Gulistan
- Tri West
- BR Funsten
- RA Siegel
- Tom Duffy
- Royalty Carpet
- Case Supply
- BPI
- Beaulieu Canada

### In Test (6):

- Herregan
- The Dixie Group
- C & C Wholesale
- Jaeckle
- CMH
- Buckwold

### Committed (8):

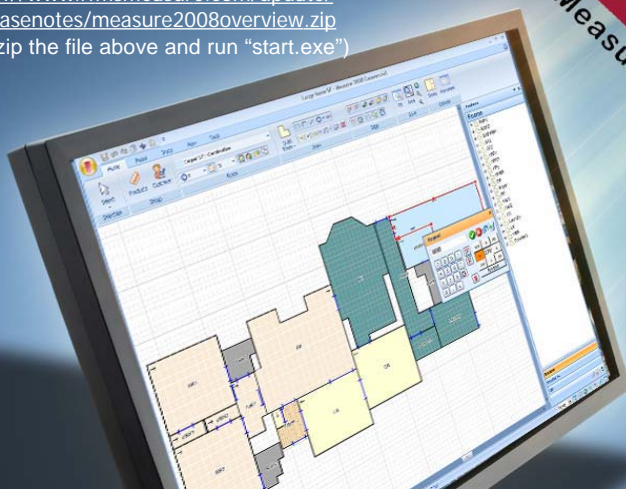
- Longust
- Galaher
- CDC
- T & A
- WC Tingle
- SeaPac
- T & L
- Virginia Tile

## MEASURE 2008

RFMS is proud to announce a new version of the Measure estimating software: Measure 2008. For more details copy the following links and paste them into your internet browser.

<http://www.rfmsmeasure.com/update/releasenotes2008mustread.pdf>

<http://www.rfmsmeasure.com/update/releasenotes/measure2008overview.zip>  
(unzip the file above and run "start.exe")



Call 1-800-701-7367, ext. 3306

# Regional...Sales Analysts



Listed below are the Regional Sales Analysts for RFMS. Contact the RSA in your area for questions and/or comments about any of our RFMS products!

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