

## THE CUSTOMER ORDER

The core of the RFMS system is the Customer Order screen. Entering the necessary sales information for a customer on this screen allows you to extract and print a variety of analytical reports without further data entry. Knowing where to get this information and what it is used for can improve the efficiency and profitability of your organization.



*In this Issue:*

**GETTING THE MOST FROM ORDER ENTRY**



**Customer Order - CG600040**

**Original Order**

Order # **CG600040** (F8) Store **3** (F8) Order Date **10/26/06** (F8) Work **F8** Cell **F8**

Hold  Customer # **11**

Sold To: TAYLOR, LUCY  
225 65TH STREET NE  
ANYWHERE, US 25252  
County: SAME

Ship To: TAYLOR, LUCY  
225 65TH STREET NE  
ANYWHERE, US 25252  
County: SAME

Delivery Date   
Invoice Date   
Measure Date  (F8)  
Est Del Date  (F8)

Sales Rep #1 **WILLIAM HENDERSON** (12)  
Sales Rep #2 **CLARA NELSON**

Tax Status **Taxable** (8)  
PO Number

Job Number  (6)  
Customer Type **CASH & CARRY** (7)

Material  5,214.00  
Services  0.00  
Misc. Charges  0.00  
Sales Tax  364.98  
Misc. Tax  0.00

**Order Total** \$5,578.98  
**Balance Due** \$5,578.98  
**Grand Total** \$5,578.98

Gross Profit = 24.51%

Line #	Style	Product Code	Roll/Item Number	Color/Description	Status
01					
01	BEAUTIFUL	PEBBLE		ROYAL BLUE	Gen

Search Line Number **0000** (10)

Buttons: Insert, Change, Delete, Notes, Cut Lines, Split Lines, Combine, Move, Export, Area (11), Picture, PO, View PO, Ship To

Buttons: Chg Order, Providers, Receipts, Payment, Notes, Express, Save, Cancel

- |                         |                       |                        |
|-------------------------|-----------------------|------------------------|
| 1. Order/Invoice Number | 2. Order Date         | 3. Hold Status         |
| 4. Delivery Date        | 5. Estimated Del Date | 6. Job #(User defined) |
| 7. Customer Job Type    | 8. Tax Status         | 9. Line Status         |
| 10. Product Sold        | 11. Providers         | 12. Sales Rep          |

The following pages highlight items 1-12 and explain how to print the corresponding reports.

# Getting the most... from Order Entry

## 1 Order/Invoice Number

Report: Sales Information  
 Purpose: To verify that all order/invoice numbers have been accounted for  
 Access: Sales Reports Module, File, Sales Info Report

## 2 Order Date

Report: Sales Audit Report  
 Purpose: Prints a report of all orders entered, based on Order Date  
 Access: Sales Reports Module, File, Sales Audit Report

Report: Material Analysis Report  
 Purpose: Prints a report by order date. Can be used for scheduling purposes  
 Access: Sales Reports Module, File, Material Analysis

## 3 Hold Status

Report: Orders on Hold  
 Purpose: Shows all customer orders that are marked as "Hold"  
 Access: Accounting Module, A/R, Orders on Hold

## 4 Delivery Date

Report:	Purpose:	Access:
Sales Totals	Report by Sales person for a given period of time	Sales Reports Module, File, Sales Totals
Jobcost Analysis	Shows Profitability	Sales Reports, File, Jobcost Analysis
Sales Info	General Sales Info	Sales Reports, File, Sales Info
Delivered Sales Analysis	Profitability by Product and Job Type	Sales Reports, File, Delivered Sales Analysis
Profit Analysis	Profitability by Salesperson and Job Type	Sales Reports, File, Profit Analysis
Material Analysis	Powerful report with many sorting capabilities	Sales Reports, File, Material Analysis
Jobcost Audit	Report of all orders jobcosted on a given day	Sales Reports, File, Jobcost Audit

## 5 Estimated Delivery Date

Report: Material Analysis  
 Purpose: Prints details of customer order lines, sorted by estimated del date  
 Access: Sales Reports, File, Material Analysis

Report: Material Analysis Report  
 Purpose: Prints a report by order date and can be used for scheduling purposes  
 Access: Sales Reports Module, File, Material Analysis

## NOVEMBER SPECIALS

### Measure Professional



**\$400**  
off

### Measure Commercial



**\$400**  
off

offer lasts thru November 30, 2006 only

# Getting the most... from Order Entry



## FROM THE CUSTOMER ORDER YOU CAN....

### Add Provider Records



You can Add Installer Records and Express Generate Purchase Orders from the customer order line?

Entering Installer Records can easily be done by clicking the Provider button located at the bottom of the customer order screen.

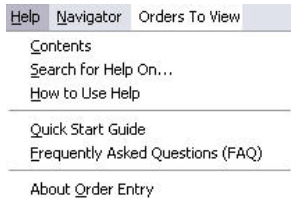
### Add Purchase Orders



If you want to create a PO directly from the customer order line, click the PO button. Its that easy.

### F1 Help

See the F1 help files for more details on these exciting features!



### 6 Job # (User Defined Field)

This is a field that you can name yourself. You may use it for Subdivision, Model #, etc. It is a searchable field when looking for customer orders. It's also available on the Material Analysis report.

### 7 Job Type (Customer Type)

Report:	Purpose:	Access:
Jobcost Analysis	Shows profitability by customer type	Sales Reports Module, File, Jobcost Analysis
Sales Info	General Sales Info	Sales Reports, File, Sales Info
Profit Analysis	Profitability by Salesperson and Job Type	Sales Reports, File, Profit Analysis
Material Analysis	Powerful report with many sorting capabilities	Sales Reports, File, Material Analysis

### 8 Tax Status

Report:	Month-End Tax Reports
Purpose:	Use to reconcile and pay sales and use tax due
Access:	Accounting, File, Month-End Reports, Tax Reports

### 9 Line Statuses

Report:	Material Analysis
Purpose:	Use for scheduling and receiving
Access:	Sales Reports, File, Material Analysis

### 10 Customer Lines

Report:	Material Analysis
Purpose:	Use for scheduling, ordering and receiving
Access:	Sales Reports, File, Material Analysis

Report:	Top Sellers from Lines
Purpose:	Use for ordering product line determination
Access:	Sales Reports, File, Top Sellers from Lines

### 11 Providers

Enter charges for installation, burdens, etc. Print reports that you use to pay your installers.

### 12 Salesperson

Report:	Purpose:	Access:
Jobcost Analysis	Shows profitability by salesperson	Sales Reports Module, File, Jobcost Analysis
Sales Info	General Sales Info by salesperson	Sales Reports, File, Sales Info
Profit Analysis	Profitability by Salesperson and Job Type	Sales Reports, File, Profit Analysis
Material Analysis	Powerful report with many sorting capabilities	Sales Reports, File, Material Analysis
Delivered Sales	Shows profitability by salesperson with labor	Sales Reports, File, Del. Sales Analysis

# Entering Customer Orders

The following instructions explain how to enter three types of customer orders in the Order Entry.

## Cash and Carry - Non-Inventory



1. Click on File, Customer Orders. Click the Insert button.

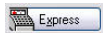


2. Click on the Insert button at the bottom of the page.

3. Click in the Misc. Charges field.

4. Enter the amount of the sale.

5. Verify the taxes.



6. Click the Express Checkout button.

7. Set the number of copies for the customer invoice to at least one.

8. Set the number of copies for a picking ticket to zero, as you have no inventory on this order.

9. Set the number of copies for the jobcost ticket to reflect what you need.

10. Click on the Invoice button to jobcost the order and print a customer invoice.

## Cash and Carry - Inventory



1. Click on File, Customer Orders. Click the Insert button.



2. Click on the Insert button at the bottom of the page.

3. Scan the bar code. Enter the quantity sold. Continue scanning until all products are entered. If you do not use bar codes, manually enter the inventory.



4. Click on the Payment button.

5. Swipe credit card, if applicable, at the Reference # field (if you have a POS keyboard). Or, enter a check number.

6. Click the appropriate payment field (cash, check, card) to enter the payment amount.

7. Type in the payment.

8. Press Enter to accept the payment.



9. Click on the Express Checkout button.

10. Follow steps 8-10 for the Cash and Carry - Non-Inventory Order to print a customer invoice.

## POSTING A PAYMENT (FROM A CUSTOMER ORDER)

1. From Order Entry, click File, Customer Orders.

2. Search for the appropriate customer order and single-click to highlight it.

3. Click on the Edit icon.



4. Click on the Payment button.



5. Select the appropriate receipt register.

6. Enter the amount tendered in the Check, Cash, or Card field.

7. Click the OK button to save.

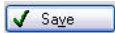
Customer	DAVIDSON, DAVID
Invoice	10600037
Store	3-A CONTRACT CARPET COMPANY
Due	34.33
Payment	34.33
Balance	0.00
Payment Date	10/24/06
Reference	
Register	002-VISA/MASTERCARD (Store: *1*)
Approval Code	
Check	0.00
Total Paid	\$34.33
Cash	0.00
Card	34.33
Tendered	34.33
Discount Account	4020
Comments	

**Note:** You can also post payments through the Multpay module (Accounting) or from the main Customer Order Screen by clicking the payment button.

# Entering Customer Orders

## Customer Order with Services

1. Click on File, Customer Orders. Click the Insert button.
2. Double click in the Sold To field and enter the customer's name and address.
3. Click on the Insert icon to add an order line.
4. Enter a product code between 80 and 98. This indicates that the line is a service line. Press the Tab key.
5. Double click on a service description from the list screen. This information is entered in the Products module.
6. Enter the quantity for this service line.
7. Click OK to save the line.
8. Click the Save button to save the order.



PC	Supplier	Service Description	Price	Servi
81	ABC INSTALLERS	CARPET TAKE-UP	\$10.00	
98	IN STORE CREW	COMPLAINT CHECK	\$25.00	
80	UNIVERSAL LINES	FREIGHT - UNIVERSAL	\$0.00	
87	ALL INSTALLERS	HW PARQUET	\$0.00	
87	ALL INSTALLERS	HW PLANK	\$0.00	
81	ABC INSTALLERS	INSTALL BERBER	\$4.00	
81	ABC INSTALLERS	INSTALL CARPET	\$3.25	
81	ABC INSTALLERS	INSTALL CPT- STRETCH	\$4.00	
80	ABC INSTALLERS	MOVE FURNITURE	\$0.50	
82	RZ INSTALLERS, INC.	VINYL INST/INLAID	\$11.20	
82	RZ INSTALLERS, INC.	VINYL INSTALL/SOFT	\$7.00	
82	RZ INSTALLERS, INC.	VINYL REPAIR	\$5.00	



## Did You Know?

RFMS founder and operator Terry Wheat was selected as one of the **TOP 20 IN FLOOR COVERING**. This selection was made by the industry journal, Floor Covering News, in their September 18/25 issue and was based on people whose vision over the past 20 years forever changed the scope of the floor covering industry. Visit us on the web at [www.rfms.com](http://www.rfms.com) for the whole story.

# RFMS Educational Opportunities



- **CLASSROOM TRAINING**
- **ON-SITE TRAINING**
- **E-LEARNING**
- **SEMINARS**



## EC AND MEASURE E-LEARNING CLASSES

### November

EC Demo	November 1, 2006	10:00 AM
Measure 101	November 3, 2006	10:00AM   2:00PM
Measure 101	November 6, 2006	10:00AM   2:00PM
Measure 101	November 8, 2006	10:00AM   2:00PM
Measure 101	November 10, 2006	10:00AM   2:00PM
Measure 101	November 13, 2006	10:00AM   2:00PM
Measure 101	November 15, 2006	10:00AM   2:00PM
EC 101	November 15, 2006	2:00 PM
EC Demo	November 15, 2006	10:00 AM
Measure 101	November 17, 2006	10:00AM   2:00PM
Measure 101	November 20, 2006	10:00AM   2:00PM
Measure 101	November 22, 2006	10:00AM   2:00PM
EC Demo	November 28, 2006	2:00 PM
EC 101	November 28, 2006	10:00 AM

### December

EC Demo	December 13, 2006	2:00 PM
EC 101	December 13, 2006	10:00 AM

## NOVEMBER/DECEMBER CLASSROOM TRAINING

### Classroom Training

Nov 6-8, 2006	Total Implementation	Tuscaloosa, AL
Nov 9-10, 2006	Windows Refresher	Tuscaloosa, AL
Nov 27-29, 2006	Total Implementation	Tuscaloosa, AL
Dec 11-13, 2006	Total Implementation	Tuscaloosa, AL
Dec 14-15, 2006	Windows Refresher	Tuscaloosa, AL

## GET READY!

**RFMS TRAINING EXPO**  
**FEBRUARY 6, 2007**  
**1 DAY FREE/10 DIFFERENT WORKSHOPS**

**MORE DETAILS  
 TO COME!**

# Software Versions

PROGRAM	VERSION	DATE
Accounts Payable	9.6.0.1889	1/04/06
Bid Pro	9.6.2.397	9/28/06
E-Commerce	9.6.0.544	8/21/06
Human Resources	9.6.1.17	10/16/06
Inventory	9.6.0.1563	10/23/06
Multi-Pay	9.6.1.5	4/21/06
Order Entry	9.6.1.34	10/16/06
Products	9.6.0.518	3/31/06
PO Printing	9.6.0.4	08/08/05
Sales Floor Assist	9.6.1.10	10/16/06
Sales Reports	9.6.0.697	4/14/06
Schedule Pro	3.5.9	8/01/06

## B2B SUPPLIER LIST

Over 380 Users Currently Enrolled



Active:	Committed :	In Test:
• Shaw	• Longust	• CMH
• Mohawk	• Gallher	• BR Funsten
• Beaulieu	• CDC	• BPI
• Ohio Valley	• Emser Tile	• Dal Tile
• WM Bird	• The Dixie Group	• RA Siega
• All Tile	• Royalty Carpet	• Case Supply
• Adleta	• Hoboken Floors	• Herragan
• JJ Haines	• Florstar (NEW!)	
• Gulistan (NEW!)	• C&C Wholesale	
• Tri West (NEW!)		

Contact David Marshello at 1.800.701.7367 ext. 3306 to get started with RFMS B2B.

## What's the News?

OVER 380 RFMS CLIENTS ARE USING B2B E-COMMERCE SOFTWARE...

**WHY?** Because B2B gives *YOU*, the independent floorcovering dealer the same technological capability as the large retailers and home centers by automating key business functions:

- Price catalog maintenance
- Purchasing
- Billing



In addition, RFMS B2B supplies:

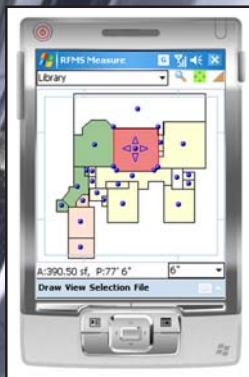
- An up-to-date product catalog that provides your sales staff with reliable pricing for quotes and estimates and keeps your showroom priced correctly.
- Accurate PO pricing that improves the accuracy of product delivery dates and job cost reports.
- Increased productivity by eliminating the extra work and errors associated with processing documents manually.

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

## Now SHIPPING...



RFMS is pleased to announce the release of **Measure Mobile** for the Pocket PC supporting Pocket PC 2003 and Windows Mobile 5 operating systems.



**Measure Mobile** is an on-site drawing tool that supports the Leica Disto A6 and Pro with Bluetooth and requires RFMS Measure for importing and calculating the materials for the estimate.

Other versions of Measure are currently available. Visit us on the web at [www.rfmsmeasure.com](http://www.rfmsmeasure.com) for more details.

**ONLY \$199!**