



## RFMS Hands-On Workshops Agenda

Spring / Summer 2020

### RFMS BASIC

#### Products

- Product Codes
- Add Product
- Edit Product
- Enter Cost
- Enter Price
- Sample Indicator
- Price Tags/Barcode

#### Order Entry

- Quotes
- Copy Quotes
- Related Quotes
- Sample Checkput
- Sample Return
- Notes
- Export
- Payments
- Single Line PO
- Line Statuses
- Cutting Lines
- Work Order
- Assign Material
- Filters
- Saved Filters
- Provider Records
- Print Invoice
- Email Invoice
- Daily Workflow

#### Inventory

- Look up Inventory
- Tags
- Express Receiving
- Costing Inventory

#### RFMS Mobile

- POS
- Customer Lookup
- Schedule Pro

#### Accounting

- Enter AP
- Check Writing
- Add Supplier

#### Schedule Pro

- Schedule from OE
- View Schedule
- Print Schedule
- Map Installers Jobs

#### System Admin

- Review Passwords
- System Options



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### RFMS ADVANCED

#### Products

- Price Range Edit
- General Range Edit
- Assoc Bundles
- Product Templates
- Special cost
- line commissions
- Product Sets

#### Order Entry

- Batch Processing
- Batch Jobcosting
- Line Groups
- Config Creator
- Billing Groups
- Percentage Billing
- Partial Billing
- AIA
- Using Product Sets/Templates
- Customer File - advanced hold types
- Customer File - discount percent/levels

#### Sales Reports

- Open Orders
- Saved parameters/Automated printing
- Review top sales and material reports
- Reports to run daily/weekly/monthly

#### Business Insights

- Overview of Dashboards
- Benchmark data
- Product Data

#### Inventory

- Receiving
- Warehouse Receiving
- Barcode Receiving
- Physical Inventory
- Tricoder

#### Accounting

- Check Writing
- Online Payments
- GL Configuration
- Budgets
- Month End

#### Human Resources

- Pay Providers
- Configure Providers

#### CMM

- Projects

#### Schedule Pro

- Create Provider Records
- 7 ways to schedule a Job.
- Quick Schedule
- Quick Edit

#### RFMS Mobile

- POS
- Customer Lookup
- Schedule Pro

#### System Admin

- Review Passwords vs. Enterprise
- System Options
- Interface Mode