



RFMS Beginner Class Agendas



Beginning Data – Part 1

- **Store Locations**
- **Sales Representatives**
- **Commission Schedules**
- **Customer Types**
- **City List**
- **Customer Record**
- **Receipt Configurations**
- **Chart of Accounts**
- **Standard Account Codes**
- **Supplier Records**
- **Product Codes (Categories)**

Beginning Data – Part 2

- **Roll Products**
- **Item Products**
- **Services (Labor)**
- **Generate Sale Prices**
- **Global Editing of Product Information**
- **Product Templates**
- **Associated Products**
- **Product Sets**

Showroom

- **Create/Select New Customer in CRM**
- **Begin a Text Conversation**
- **Enter Product Options, Share with Customer & Create Measure Drawing**
- **Draw Rooms, Add Options and Apply Products**
- **Publish each Measure, Sync and then view in CRM**
- **Export to RFMS Quotes & Share with Customer**
- **Customer Chooses and Approves Quote**
- **Export Approved Quote to an Order**
- **Sample Checkout**

Order Entry

- **Create Quote**
- **Convert Quote to an Order**
- **Create/Select New Customer for Order**
- **Select Products to Special Order**
- **Designate Special Shipping Locations for Material Ordered**
- **Assign Existing Inventory**
- **Establish Areas of Installation**
- **Posting Customer Deposits**
- **Staging Materials for Installation**
- **Preparing Crews for Installation**
- **Express Checkout of Cash & Carry Orders**

Inventory

- **Creating Special Order & Stock Purchase Orders**
- **Printing & Emailing Purchase Orders**
- **Receiving Inventory with/without Barcodes**
- **Printing Barcoded Inventory Tags**
- **Performing Inventory Adjustments**
- **Returning Inventory to Stock**
- **Review Key Inventory Reports**

Operational Accounting – Part 1

- **Costing Inventory**
- **Posting Labor to Job**
- **Job Costing an Order**
- **Daily Recap of Customer Payments**
- **Weekly Recap of Labor Bills**
- **Monthly Recap of Commissions**

Operational Accounting – Part 2

- **Customer Account Balance Settlement**
- **Printing Statements**
- **Accounts Receivable Aging Report**
- **Posting of “Non-Inventory” Payables**
- **Accounts Payable Check Run**
- **Accounts Payable Aging Report**
- **Performing Bank Deposits**

- **Bank Reconciliation**
- **Preparing Payroll**
- **Printing Payroll Checks**
- **Sales & Management Reports**