PRODUCTS MANAGEMENT

RFMS

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Why Optimize the Product File?

The Product File is the engine of your RFMS system. The effort that you put into building and maintaining a product file with good, clean data ensures that the entire system runs smoothly and consistently.

It is highly recommended to have a products/pricing/showroom manager. This person will manage products, B2B, importing of excel price sheets and pricing of the showroom and samples in RFMS.

The Basics – Product File Entry Types

1. E-Commerce – requires B2B subscription with RFMS
2. Gateway – for Carpet One, Flooring America and Floors to Go dealers only
3. Imported – requires Product Import Export (PIE) utility
4. Manual
5. RFMS Created

E-Commerce

B2B E-Commerce is defined as a method of doing business through the use of supplier-based websites. RFMS E-Commerce allows receiving product catalogs, advance ship notices and supplier invoices electronically through the internet; B2B E-commerce also allows sending purchase orders in real time and receives electronic acknowledgements back directly through the RFMS System. By sending and receiving documents electronically, critical business documents can be processed in a faster, more efficient and accurate manner.

Product Catalogs

- Negotiated price list - specific to your company
- Updates are sent on a daily basis to reflect your pricing changes, product adds and drops
- Includes both private label and open line products
- RFMS automatically creates Audit Reports to document changes and updates.

Invoice Matching

Suppliers generate Invoices nightly that are downloaded automatically into the RFMS B2B system
Eliminates several tedious and time-consuming steps
- Opening, sorting and routing mail
- Distributing or filing invoices for inventory costing
- Entering invoice information into system

The Electronic Invoice is matched to your POs for verification
You control when the record is posted to AP
Invoices are automatically archived. Easy to use reports detailing invoices by supplier, date, etc. are available

Shipment Notification & Details

- Notices are produced by the Supplier or Distributor in real-time when your product is shipped
- Notices provide detailed information of shipment including an RFMS inventory barcode
- ASN matches up to PO and inserts roll and dye lot numbers into inventory record

Purchase Orders

- Import up-to-date product info/pricing into your PO
- Transmit to the Supplier including:
    - Footage, Roll, Roll Balance and Item Orders
    - Requested ship dates
    - Dye lots
    - Reserve numbers
    - Ship partial
    - Special instructions
- PO’s are transmitted/confirmed on a real-time basis

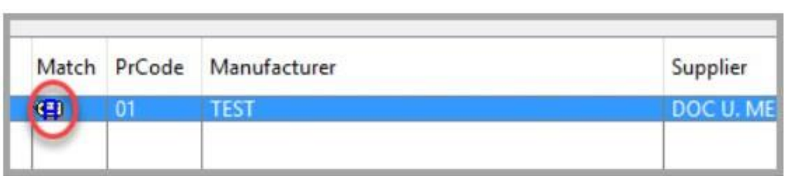
Link to participating vendors
https://www.rfms.com/vendor-list/

Product Import Export (PIE)

Products > File > Utilities > Product Import/Export
This utility requires 2 hours of training. Please contact the Training Department to schedule.

Product Import/Export (PIE) is a tool to import and export products into and out of the RFMS Product File. It uses a single spreadsheet for Rolls, Items, and Services. The older import/export required the use of multiple spreadsheets. PIE is the method used for importing product catalogs from suppliers who do not participate in B2B. Importing from the supplier spread sheets can also ensure consistent data from the supplier into the RFMS Products catalog. These records are marked as type "imported" and have some fields that are not editable manually.

Fuzzy Match
If there is a match, then Product Import/Export (PIE) will attempt to do a Fuzzy Match if Import with Match is selected. A Fuzzy Match is based on:



Product Code (Column B)
Supplier (Column D)
Private Supplier (Column E)
Supplier Style (Column F)

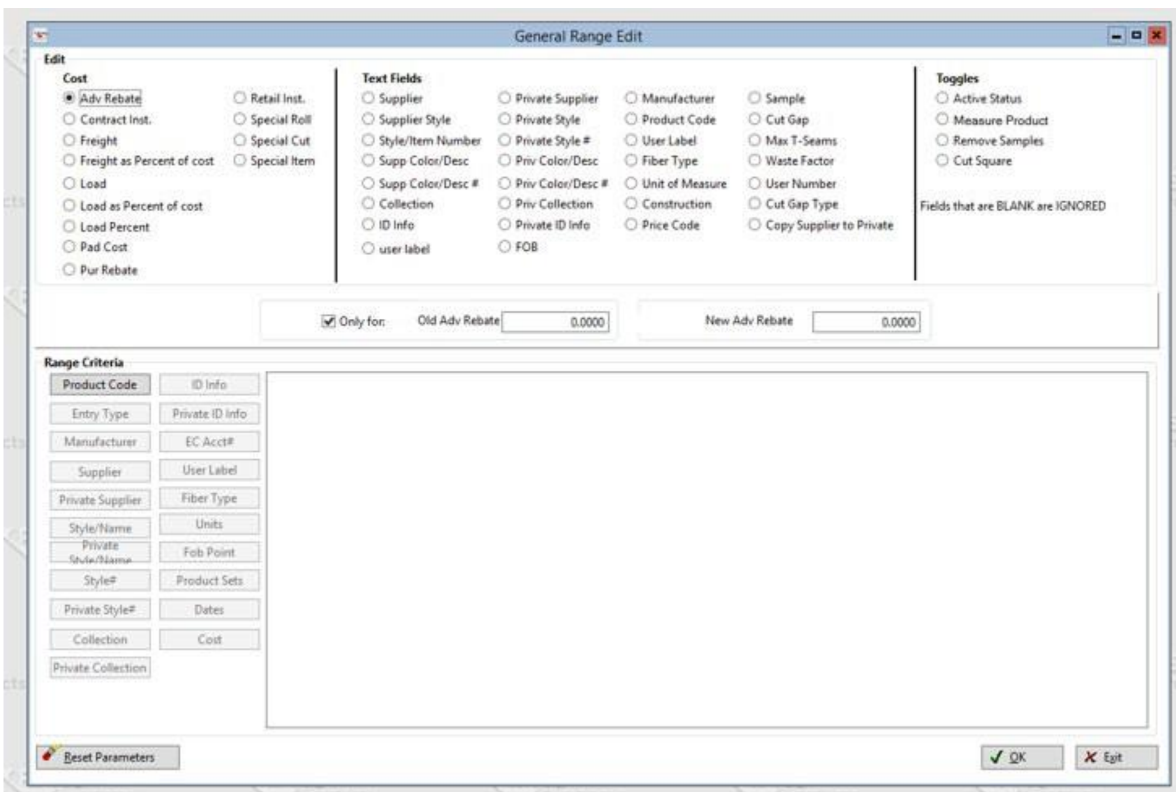
Private Style (Column G)
Supplier Style/Item Number (Column H)
FOB Point (Column X)
Store (Column Y)
Roll Width (for Rolls) (Column AK)
All of these must match for a successful match to be found. The imported product will be merged with the existing product.

Direct Match
The columns from the CSV file used for direct match are:
Product Sequence Number (Column A)
Color Sequence Number (Column K)
Standard Width (Column AK)

Range Edit Tools

Products > File > General Range Edit
These parameters allow you to quickly and easily make changes to a variety of product fields.

This tool is extremely beneficial for keeping your product file consistent.

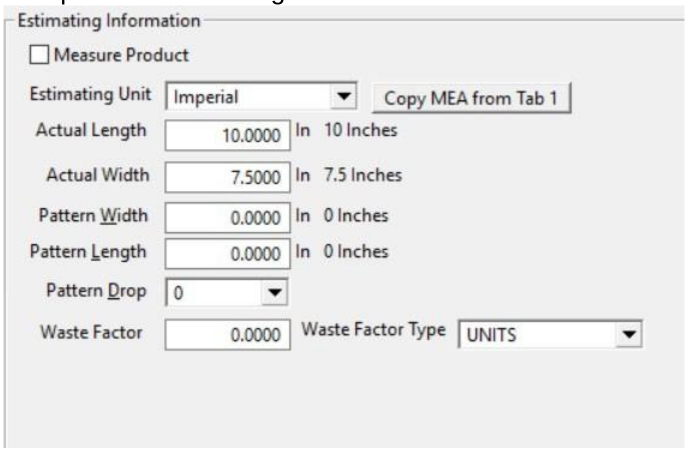


See more information here:
https://rfmsinc.zendesk.com/hc/en-us/articles/212669167-General-Range-Edit

Measure products - estimation copy utility

Products > Utilities > Estimation Measurement Copy

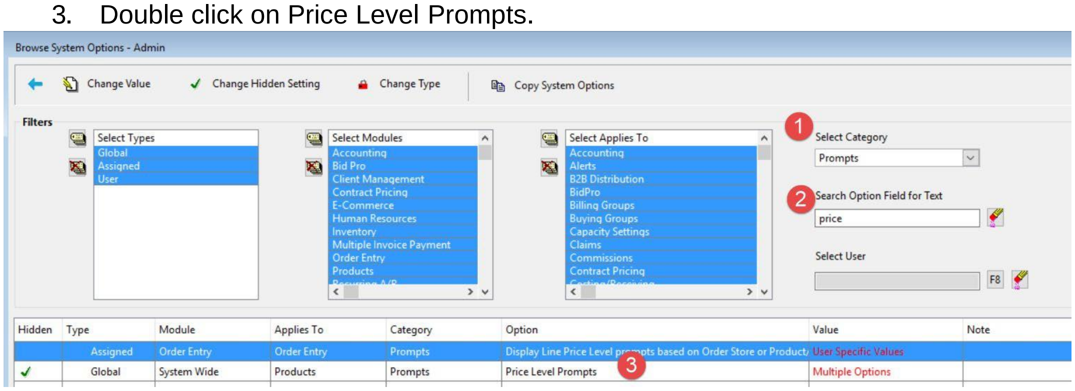
This utility will copy the data for all existing products from the Product Information tab to the Extended Information tab. This utility should be run once per week thereafter by an RFMS user to ensure that new products have length x width values available to the Measure Mobile user.



Price Labels and Formulas

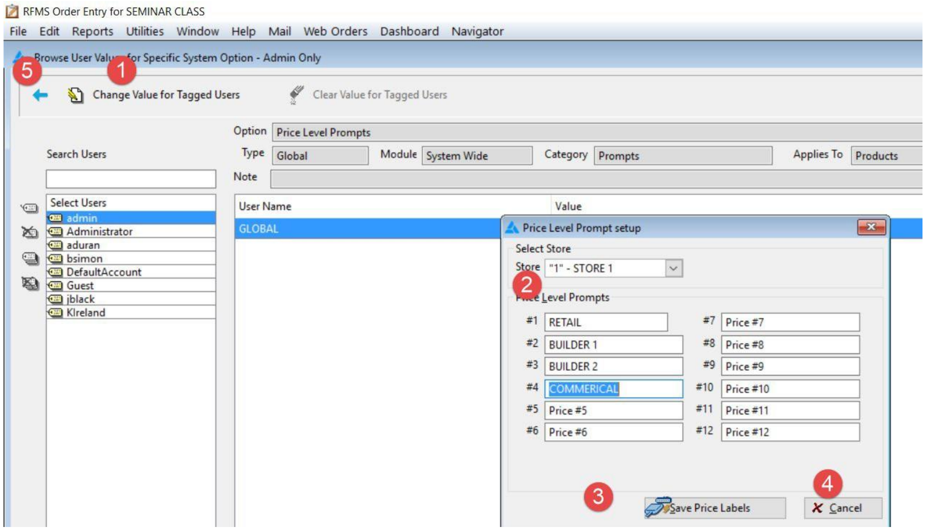
Price Labels

1. RFMS gives you 12 price points from which to choose. Here is how you can name those price levels:
    a. Go to Order Entry > Utilities > System Options > Admin System Options.
        1. Select Category choose Prompts
        2. Type in price
        3. Double click on Price Level Prompts.



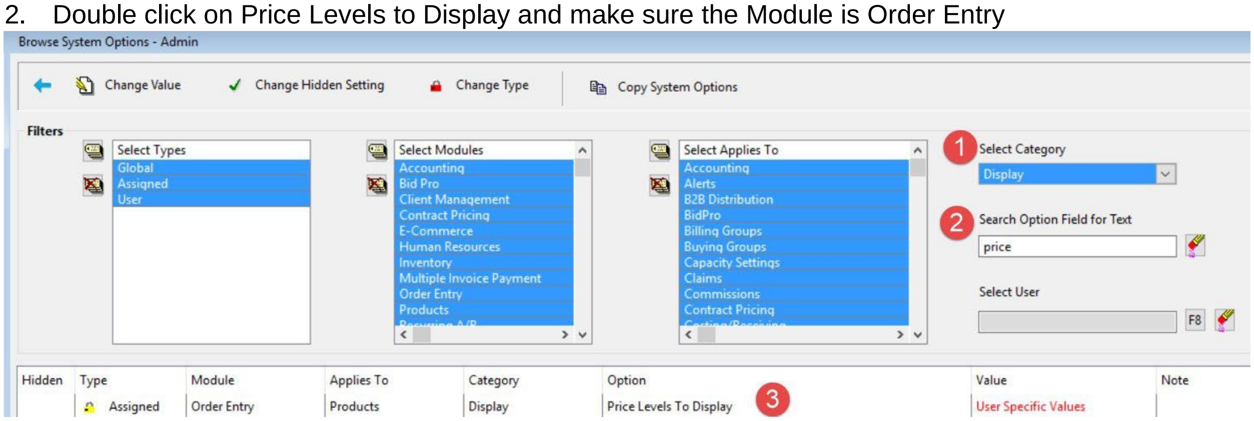
1. Rename the prompts to your preferred names. Here's an example: Choose the option Change Value for tagged users
2. Rename the prompts
3. Click save price levels

4. Click cancel (this does save them)
5. Then, click the blue arrow to back out of this record.

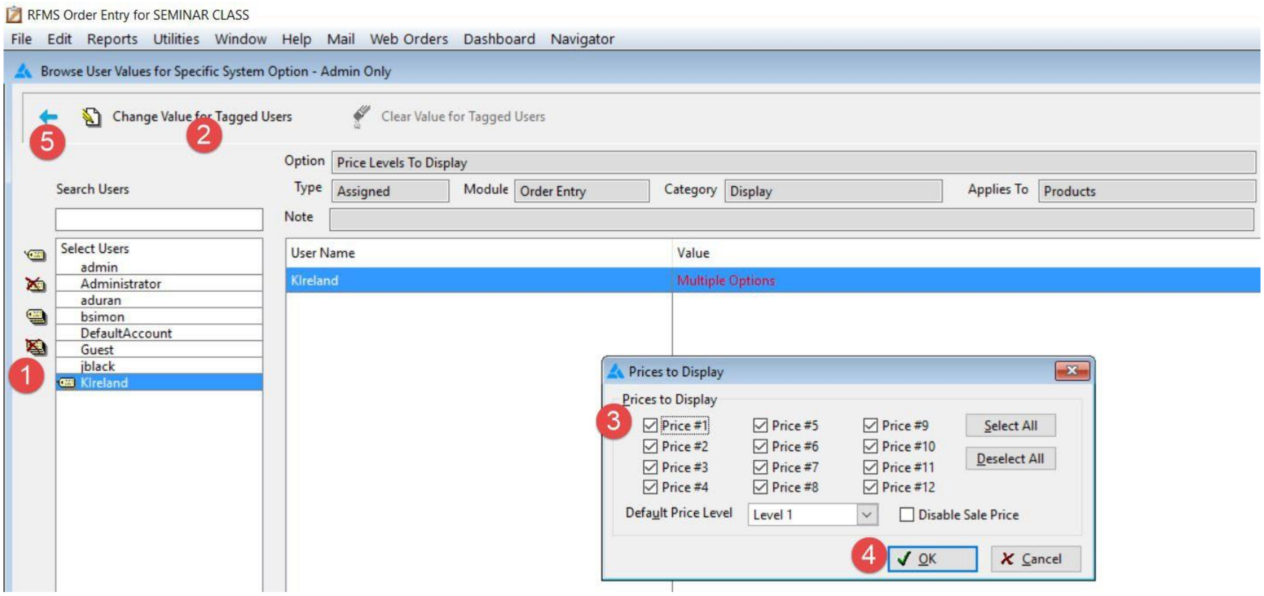


While you are still in System Options, you should set user permissions for the price levels.
Select Category Display

1. Search option field for text type in Price hit tab
2. Double click on Price Levels to Display and make sure the Module is Order Entry



1. Tag the user. This can only be done one at a time
2. Change Value for Tagged users
3. Select the price levels you want this user to see
4. Click ok – and continue the steps till all the users can view the price levels
5. Click the Blue arrow to exit this screen

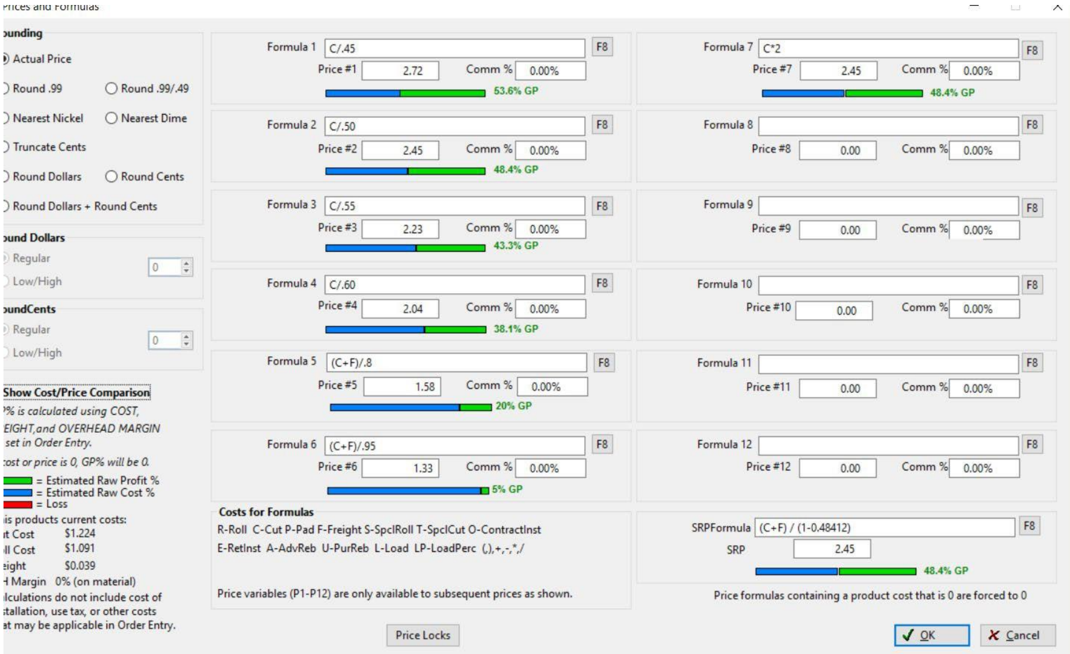


Now that you have done all this, you will be able to see the prices you have set up in the Products module for Rolls, Items and Services.

The Prices selection is used to apply multiple selling prices. Price Ranges are calculated using basic algebraic formulas.
RFMS has two ways to apply formulas. Method #1 is on the individual record and Method #2 is globally.

Method #1 - Individual records.
Open Products and go to File Roll, Items or Services.
Find the Product you want to put pricing on and highlight it. With the record highlighted, choose the green dollar sign

Enter your formulas for each price needed. If you
Rolls C = Cut cost R = Roll cost
Items I = Cost
Services S = Cost
F=Freight (estimated freight cost per unit of measure)



<u>Method #2 - Globally change prices</u>

Products > File > Price Range Edit

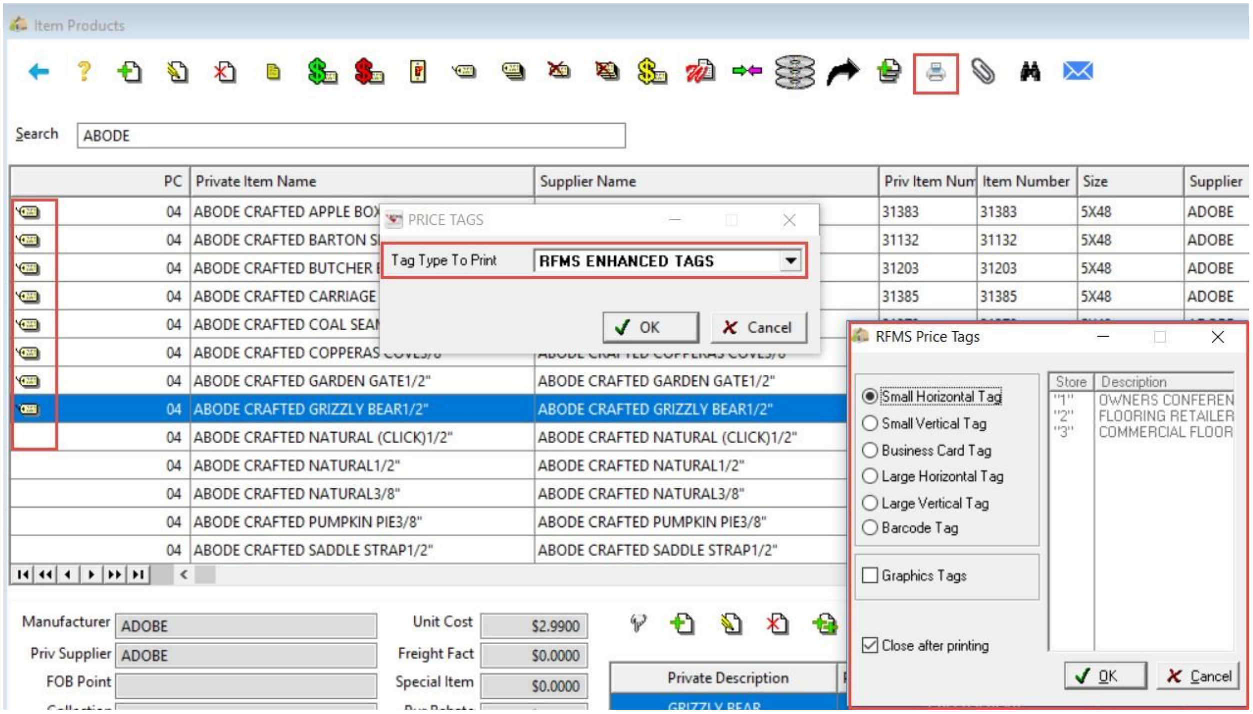
1. Select the Product Type Roll, Items or Services you want to create pricing on for the formulas you are using and tag the product codes and select them with the finger icon.
2. You have the option to narrow down your selection or you can simply put the formulas on ALL then, click Go To formula set up
3. Here is where you will enter the formulas for your price level prompts. Keeping in mind you need to enter the formula for the prices as they are named. * Please note this screen doesn't show the price level names.*

The same price formulas can also be set up in your EC module to automatically apply pricing as records are imported.

E-Commerce > Utilities > Set Up > Price Formula

Price Tags

To generate price tags, first the select the product record by tagging one or more records. Then, click the printer button.

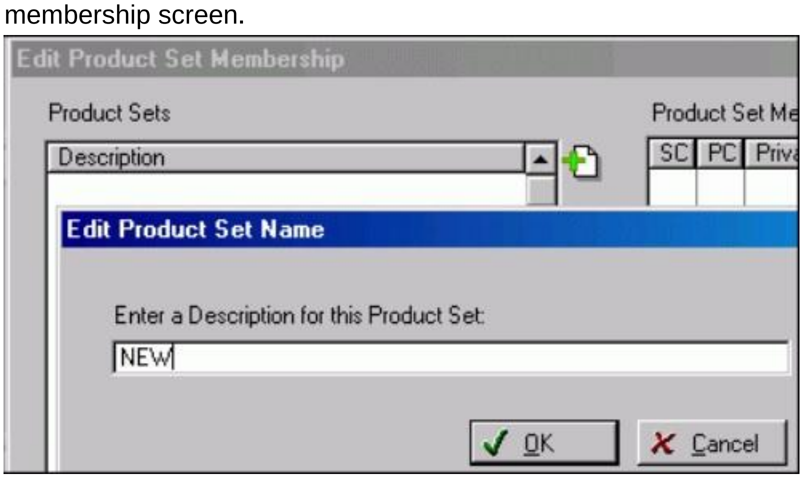


The RFMS Enhanced Tags have a pre-printed border and are available in two sizes, 5" x 7" and "3.5 x 5.5". A business card sized tag is also available. The tags can be printed either vertically or horizontally through the software. To purchase tags, please contact RFMS.

Product Sets

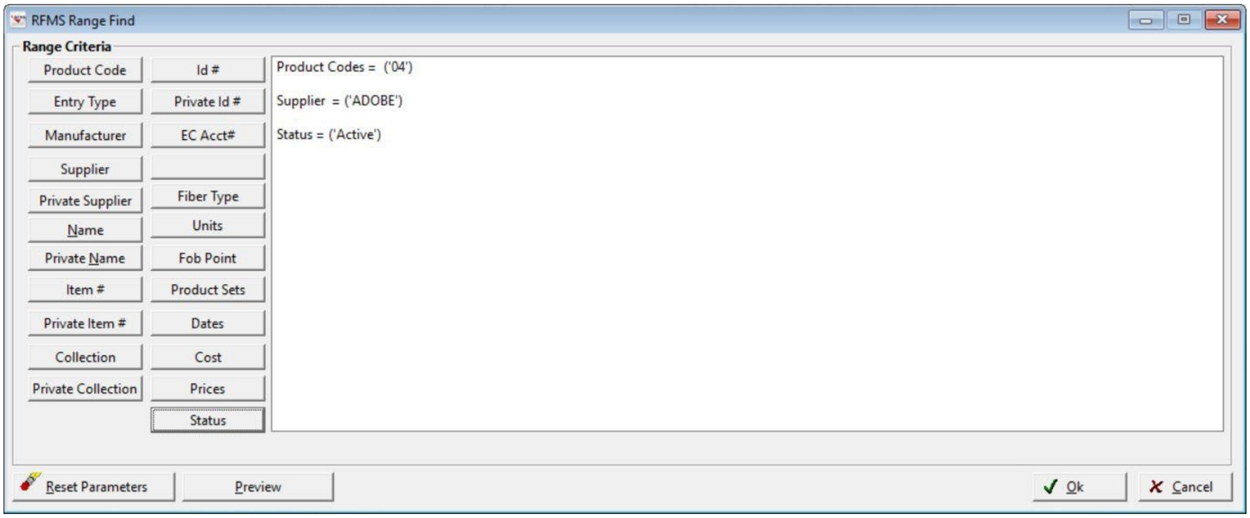
Products > Utilities > Product Sets

This feature gives the ability to associate products for reporting by user defined categories. These associations are called product sets and can also be added on an individual product record.
First, add a new set by clicking the insert button next to the product set area of the edit product set membership screen.

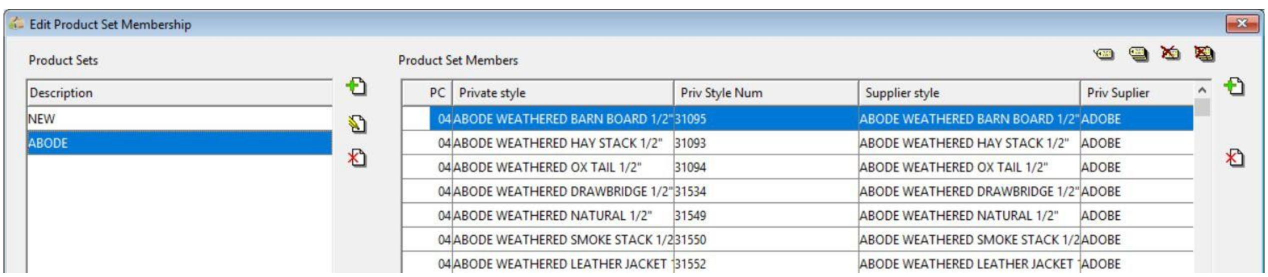


Next, add members to the set by clicking the insert button next to the product set members area.

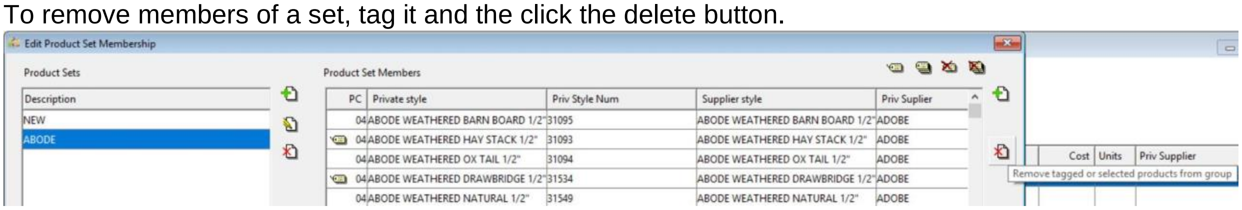
This displays the parameter selection window allowing filtering of the products to be added. Select the options to refine the list. Click the preview button to see if the selections are giving the desired results. Click OK when list is refined.



Now the filtered list is a part of the set. Highlight a product and click the delete button to remove it from the set. Click the insert button to filter and add more members.

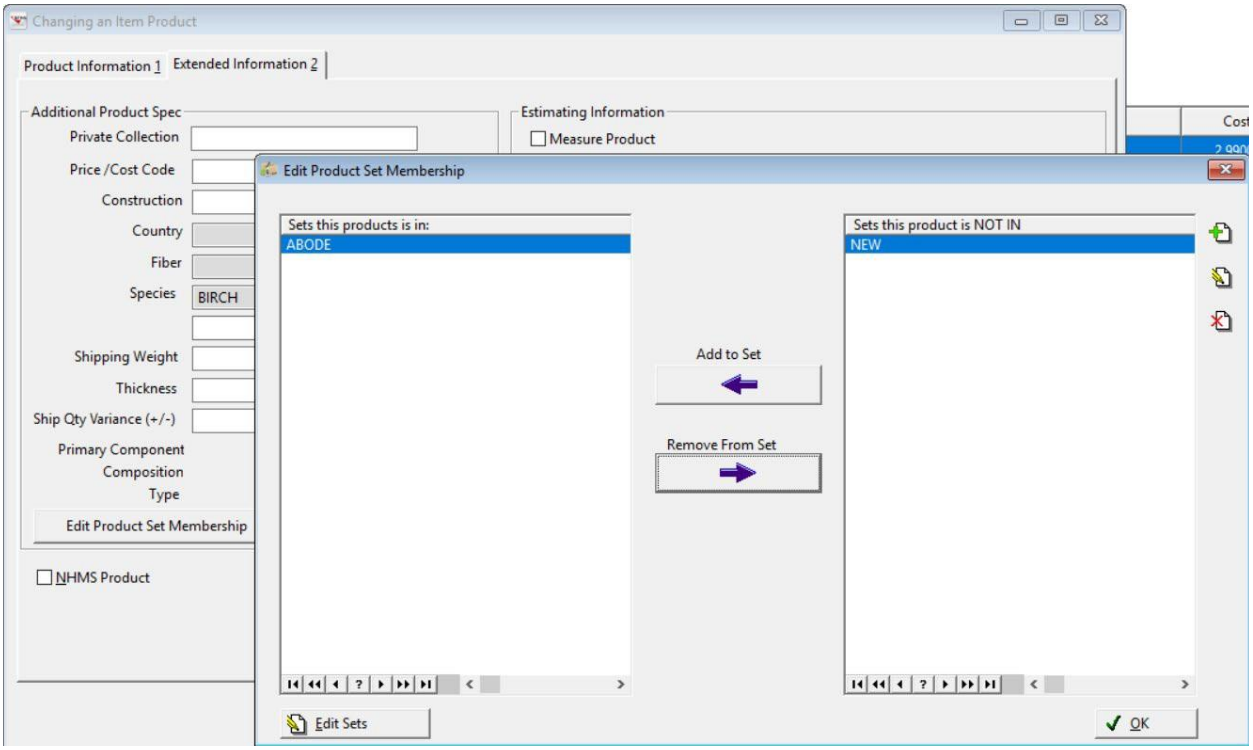


To remove members of a set, tag it and the click the delete button.



Set member may be sorted by clicking the column headers. The current sort is indicated by a + sign.

On individual product records the membership can be accessed by going to the extended information tab and clicking on the edit product set membership button.



This displays the edit product set membership screen. This shows the sets the product is a member of, the sets the product is not a member of and allows the addition or removal of the product from sets. Using the buttons next to the sets this product is not in section, set can be added, the names edited or sets deleted.

Click the edit sets button to display the screen to add new members as a group to sets.

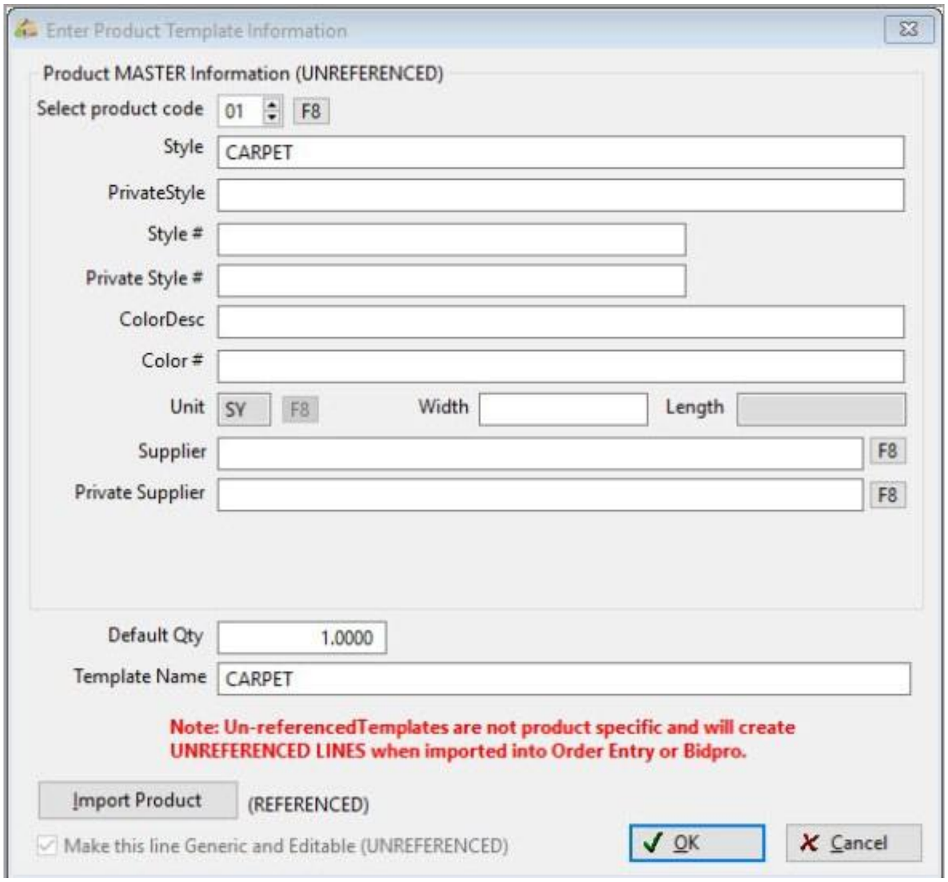
A product may be added to a set also by right clicking on the product and selecting add to set from the pop-up menu.

Product set has been added as a sort option and a filter parameter to the materials analysis report. This can be an excellent way to determine the performance of displays in your showroom.

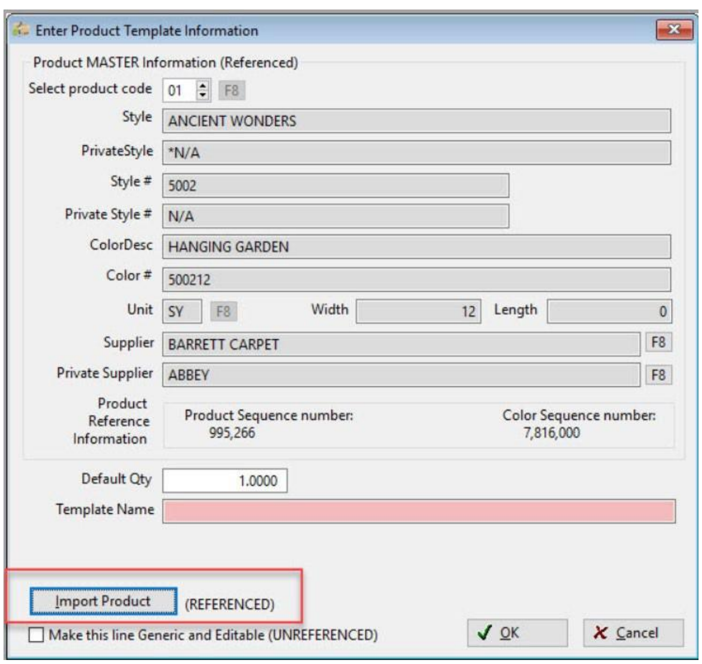
Product Templates

The Product Templates feature allows creating product groupings for specific types of jobs in order to populate generic order lines as well as referenced product lines. This feature can be used to assist the order entry employee, especially if a particular job requires multiple materials that could be possibly forgotten or overlooked. One example is a Hardwood Install Template created that consists of transitions, glue and quarter round, in addition to the hardwood material.
Creating a Product Template
Create a Product Template Name and Add Template Master Product.

1. Create a Generic Template by typing in a Style and a Template Name. This template would not have an actual master product. For example, Carpet and Carpet.



2. Create a Template based on a specific product by clicking Import Product and pull the product in. This will leave it referenced.



To leave the template record referenced to the product record, leave it as is. This means when changes are made to the product record, the template record will pick up these changes. This template record will only be applicable to the specific color used to create it.

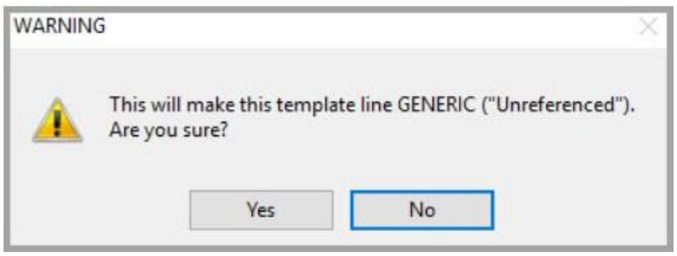
The advantage is when a bid, quote or order is created; the information from products is up to date.

The disadvantage to this method is one template must be created for every color in a style that is routinely used.

3. Create a Template based on a specific product by clicking Import Product and change it to unreferenced.

If the product information pulled in is just going to be used as an example line which can be edited to select a specific color, check the box which says, and “Make this line generic and editable (UNREFERENCED).

A warning message will display.



The template record is now unreferenced and will not pick up changes made to the product record.

The advantage to this method is one template can be created which can be used for every color in a style.

The disadvantage is when a bid, quote or order is created, the user must F8 and pull the information back in from products to get the correct color and up to date information.

Adding Template Member Products

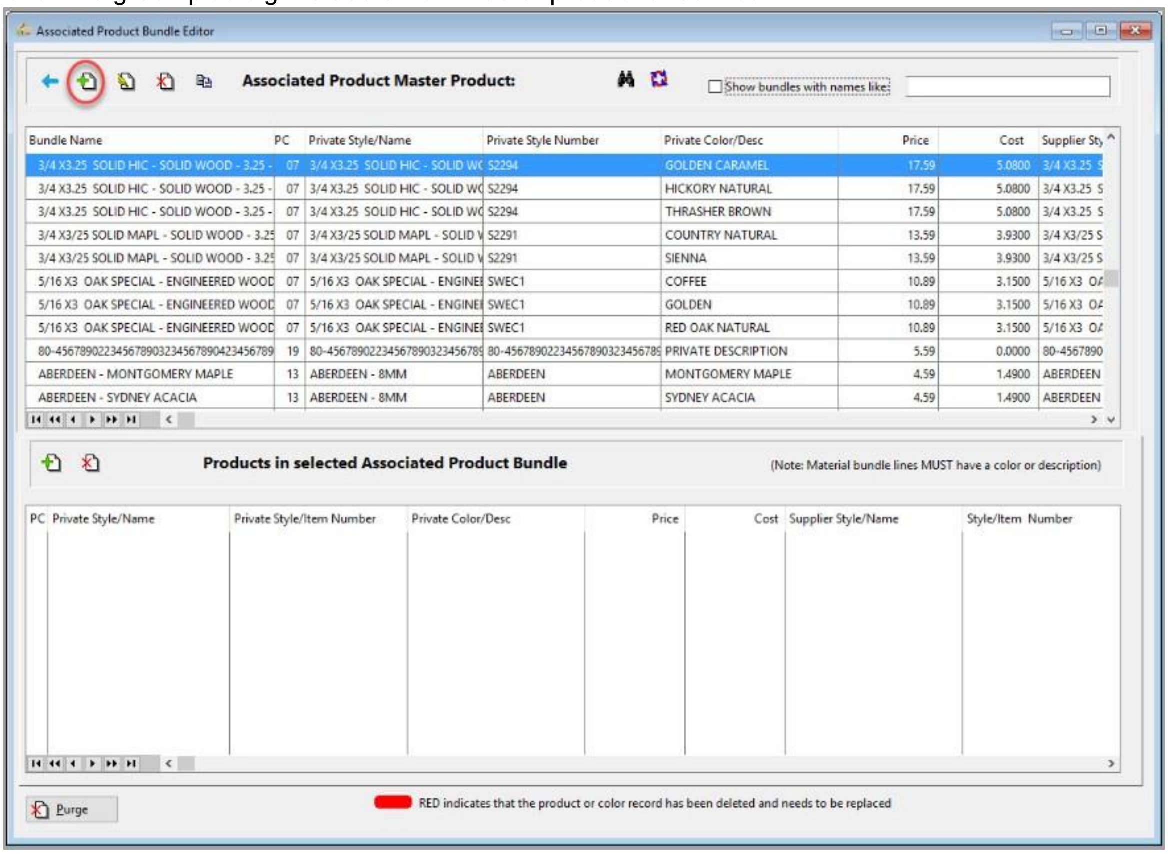
The template product members can be added in the same three options as the main record. When adding an item product, the product record must include a color record to be valid.

Using a Product Template in Order Entry or BidPro
When entering a quote, bid or order line, click the Template button. The Template screen will display. Select the appropriate template for this particular job from template screen.
An order line will be populated for each material included in the template. Select the appropriate product for each line and enter the appropriate quantity for each order line.
Product Templates can be created using actual products and the template line will remain associated or referenced to the product.

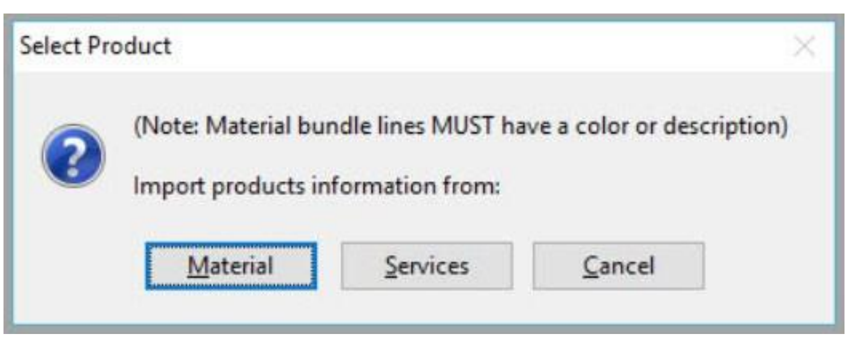
Associated Product Bundles

Associated Product Bundling allows entering multiple products from your Products module together in a specified group. Using this feature makes data entry in the Order Entry module much easier because all products for a particular type of job can be pulled into the Customer Order and lines are automatically populated using these products.

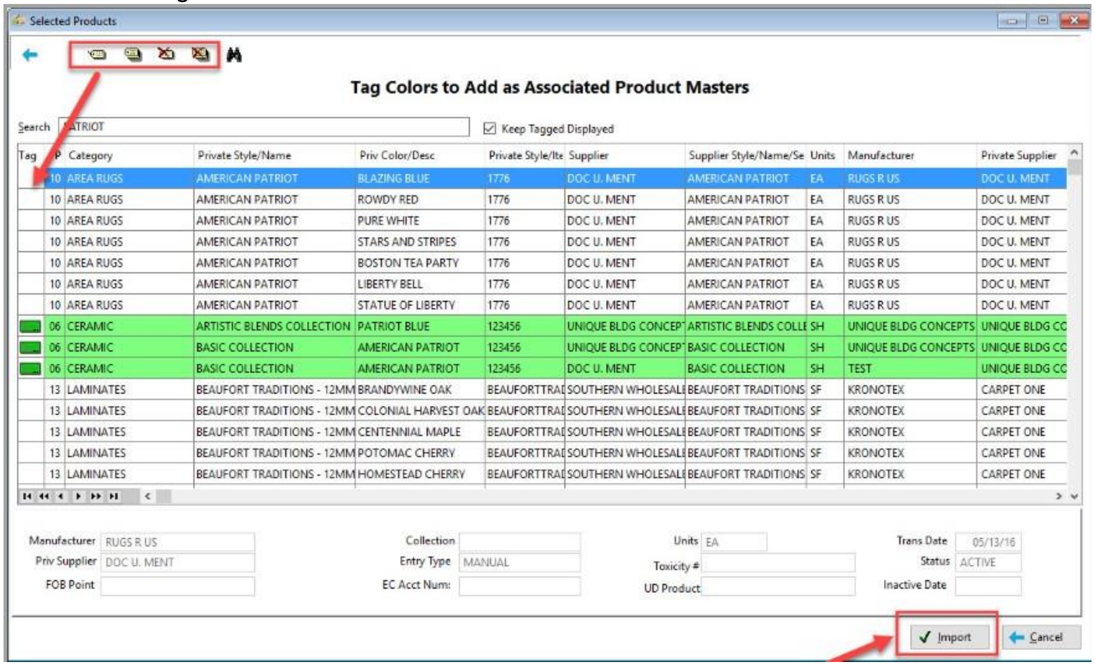
Click the green plus sign to add a new master product or service.



On the Select Product screen, select either Material or Services.

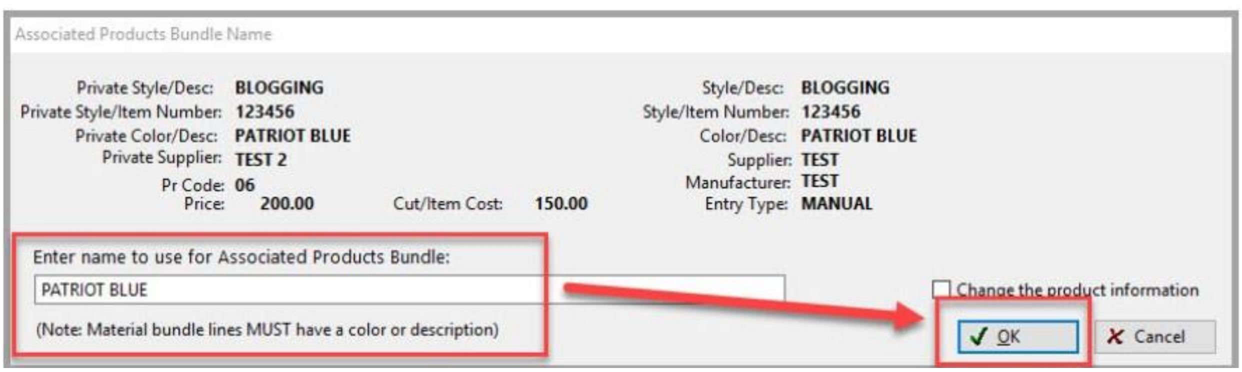


To create the new bundles, search and tag the product(s) or service(s). Tagging can be done with the icons or clicking in the far left column.

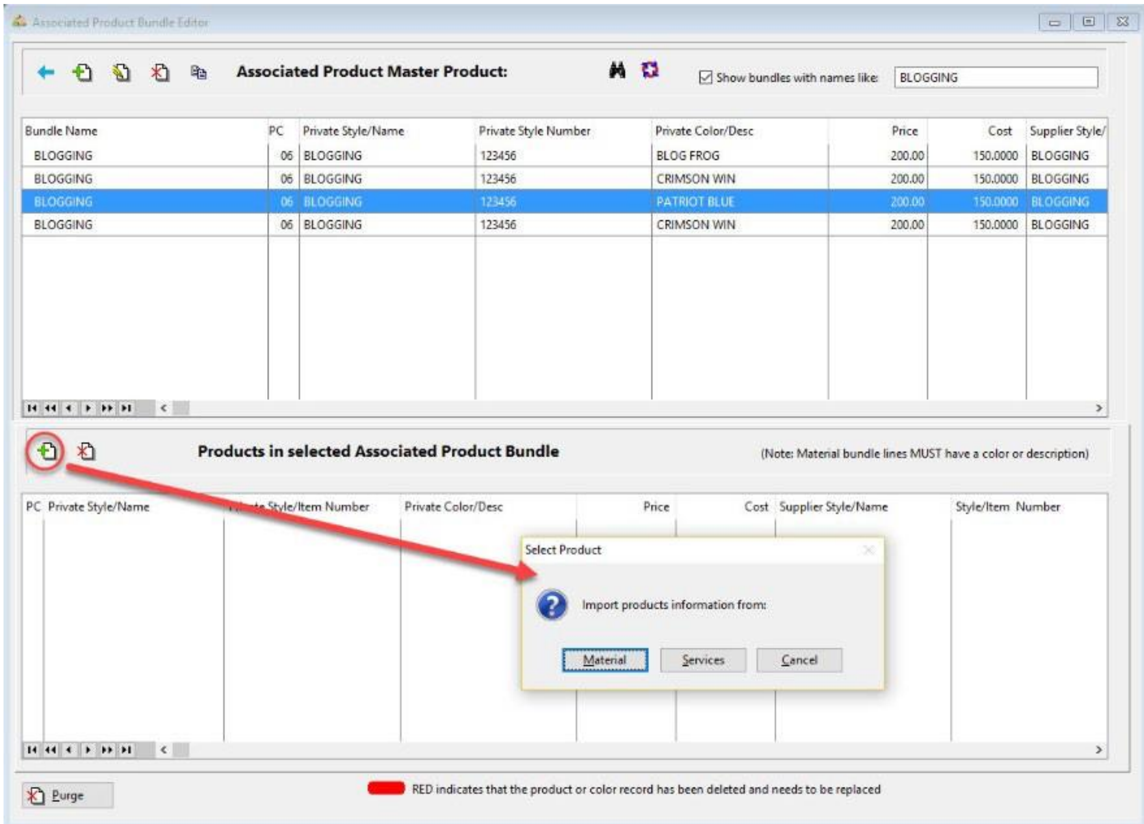


After all needed product(s) or service(s) are tagged, click the Import button on the bottom right of the screen.

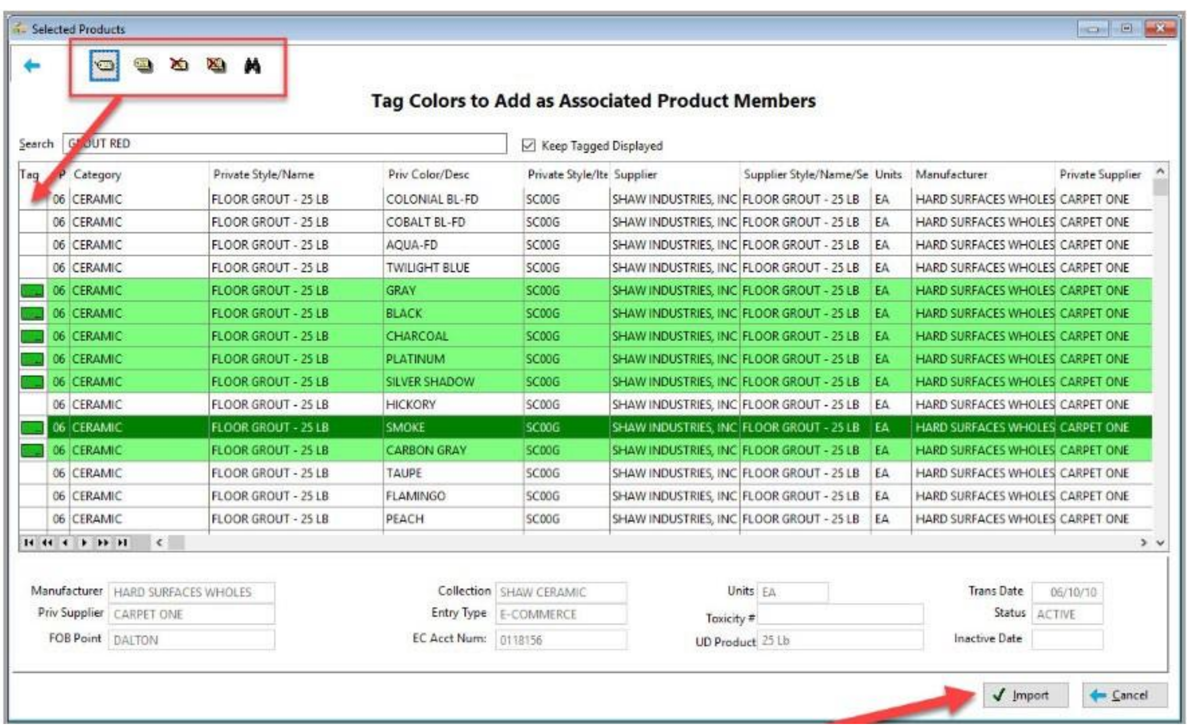
Each record will open allowing the name of the bundle to be changed. Click OK after the name has been checked or changed.



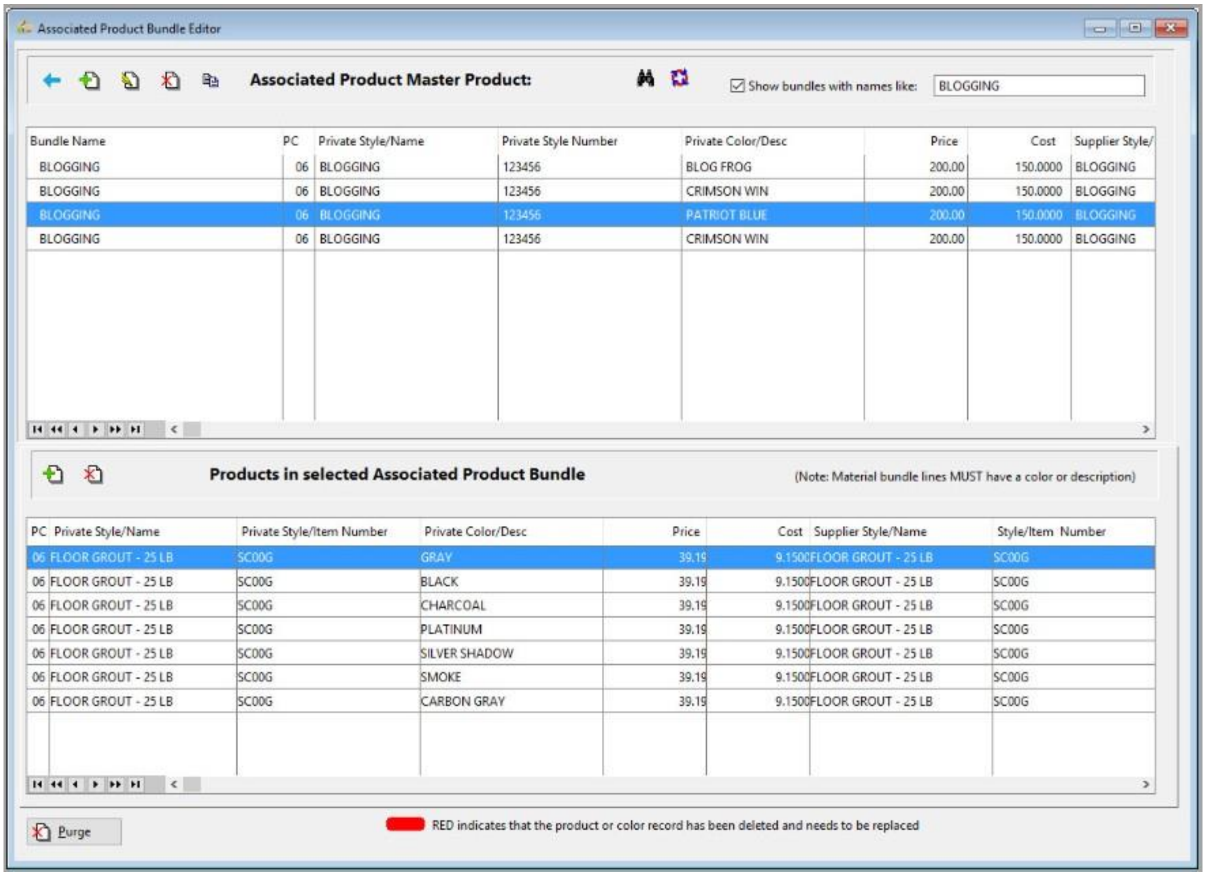
Highlight the master product or service and click the green plus sign at the bottom of the screen to select the materials or services that will be associated with it. Choose Material or Services.



To add the Associated Product(s) or Service(s), search and tag the product(s) or service(s). Tagging can be done with the icons or clicking in the far left column.

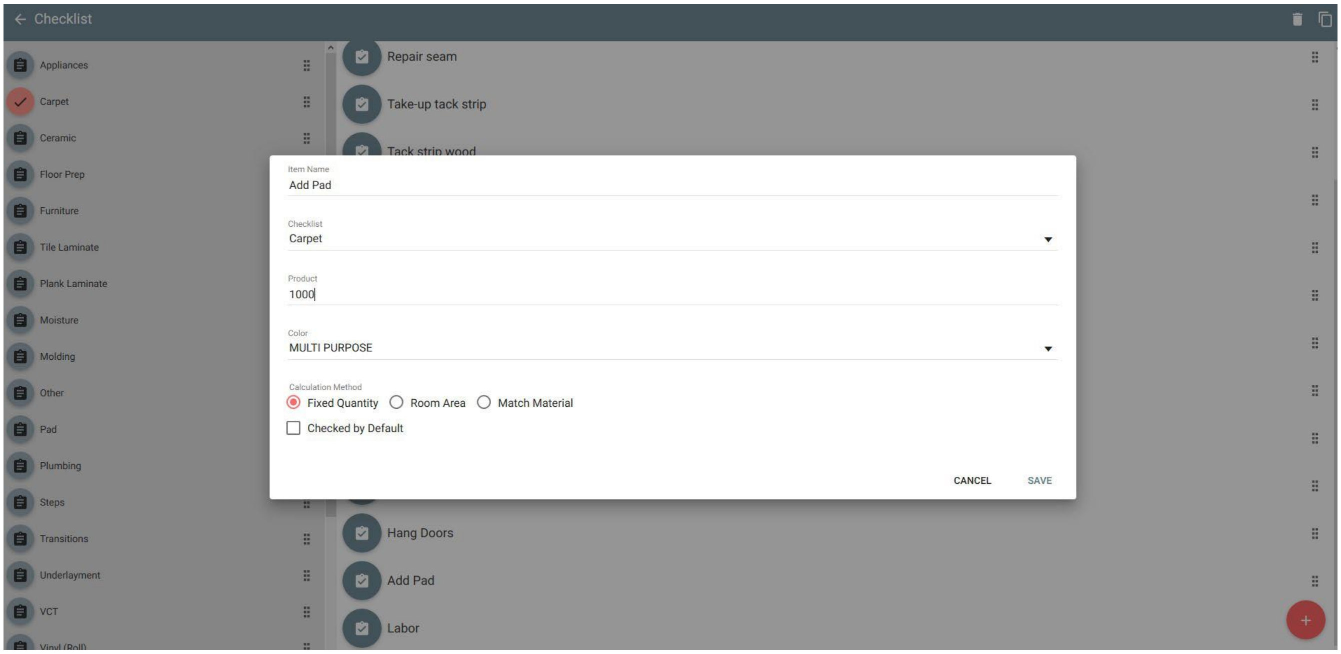


After all needed product(s) or service(s) are tagged, click the Import button on the bottom right of the screen.
All the tagged records are now pulled over to the master record.



Checklists for RFMS Mobile

As more companies turn to mobile solutions, the Product File gains increasing importance. RFMS Mobile checklists are most effective when they are tied to a valid product file entry.



Unreferenced Lines

With a properly built and maintained customer file, unreferenced lines should not be necessary. The use of unreferenced lines while seemingly quick and easy causes a great deal of duplication in your system and makes tasks like order entry, reporting and taking a physical inventory much more difficult. For this reason, we do not recommend the use of unreferenced lines as a best practice.

https://rfmsinc.zendesk.com/hc/en-us/articles/209092297-Easy-Way-to-Keep-from-Using-Unreferenced-Lines