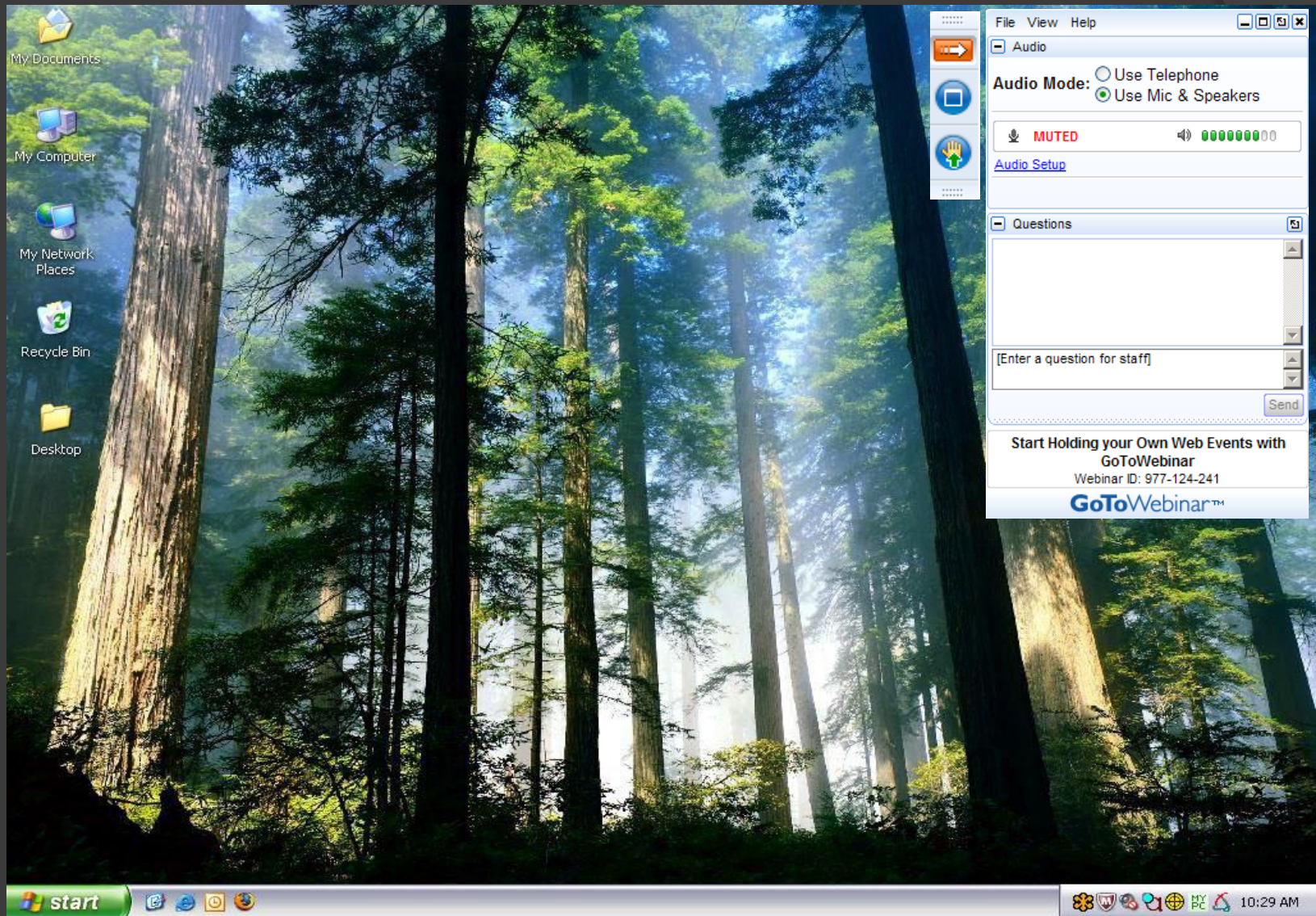


Utilizing RFMS to increase Professionalism in your Business

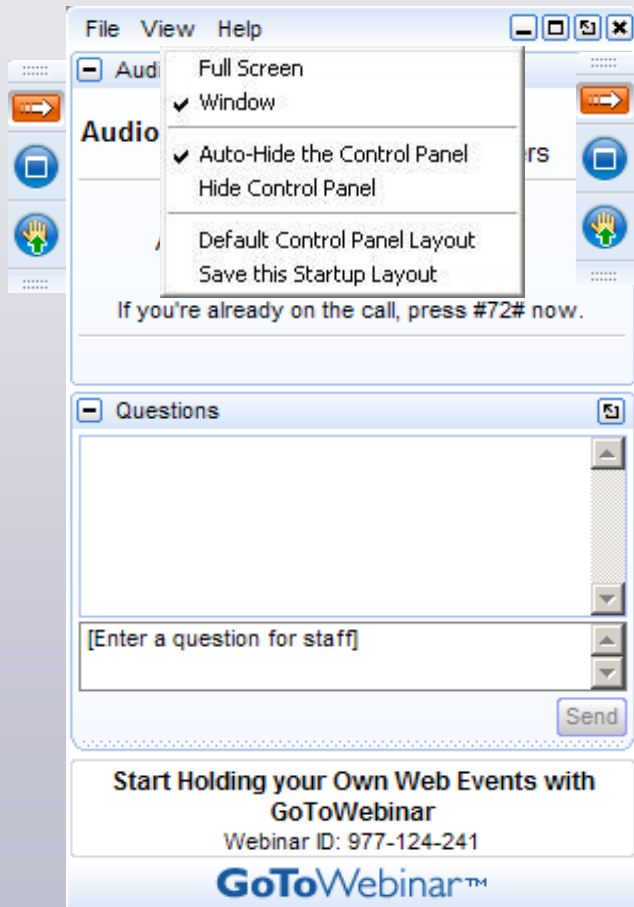


Presented by: Kerri Ireland
RFMS Trainer / Consultant
kireland@rfms.com

The GoToWebinar Attendee View



How to Participate Today



- Open and close your Panel
- View, Select, and Test your audio
- Submit text questions
- Raise your hand
- Q&A addressed at the end of today's session
- Everyone will receive an email within 24 hours with a link to view a recorded version of today's session

Upcoming Webinars

Overview

Learn all the ways RFMS can make your business more professional and punctual. Automated actions, emailed reports, and customized print layouts are a few of the topics we will cover.

Today's Webinar Outline

- Going Green – Print Options
- Required Fields – Interface
- Presentation to customers- Custom Config & Mail Merge
- Emailed reports- Reports save Parameters, Task Scheduler

Three ways to save a pdf file in RFMS

- ④ Save As PDF
- ④ Save to PDF History
- ④ Save Invoice CG#####
- ④ Print using PDF printer
- ④ Emailing

Save as PDF

When Print Previewing a report/document the user can select **File > Save As PDF**.

The user will be able to enter a name for the document and select a location to save the document.

Note, when using this method, legal size reports can be saved then printed on letter size paper. To do this open the saved PDF file, then when printing choose "Fit to Page." It is recommended to print in landscape mode as using "Fit to Page" will shrink the printed data to fit the width of the paper size.

Pages to Print...

Across: 1 Down: 1 Zoom: Tile pages

Print

Print Current Page

Save As PDF

Exit

OWNER'S CONFERENCE 2017

Page

Sold To

MOUSE, MICKEY
12345 DISNEY WAY
ANAHEIM, CA 9280

Invoice Date

08/08/18

Inventory

Style/Item

M35150H PRELUDE - VIN
00IN
9971 BUILDER VINYL

Save PDF File

This PC > Documents

Search Documents

Organize

New folder

- 2019 Webinars
- Boot Camp Wor
- Pr
- RemotePackage
- OneDrive - Resou
- This PC
- 3D Objects
- Desktop
- Documents
- Downloads

Name	Date modified	Type	Size
Custom Office Templates	2/27/2018 3:25 PM	File folder	
...			
...			
...			
...			
...			
...			
RingCentralMeetings	7/29/2019 3:30 PM	File folder	
Scanned Documents	9/4/2019 10:42 AM	File folder	
Snagit	3/26/2018 7:54 AM	File folder	

1. Go to File-Save As

2. Choose Destination to save the document

3. Choose a File Name

File name: Mickey Mouse_OC000009

Save as type: PDF

Hide Folders

Save

Cancel

Save to PDF History

PDF History can now be stored for some reports that are printed for Orders, Quotes; Scheduled Jobs work tickets and Client Management Projects. More options will be added as needed.

PDF History is a new way to store a report into the sql database using pdf formatting. The entire report is stored directly into a PDF History table in the database.

There is no external file. Therefore it cannot be accidentally moved or deleted.

When viewed it will always be reproduced the exact same way as when it was saved.

Users will easily be able to browse the PDF History and view each of the reports that have been **PRINTED** if Save to PDF History is checked on the Print Screen for an order, quote, job etc...

Confirm Invoice Printing

Invoice

Invoice to Print: FINANCE CHARGE

Copies: 1 ☒ Print Invoice

Invoice Date: 05/25/04 F8

Times Invoice Printed = 0

Line Grouping: Do not Subtotal

☐ Post to Batch

☐ Save "Invoice 14743.pdf"

☐ Email PDF ☐ Create OPS Invoice

☐ Save to PDF History

☒ Preview Invoice

Destination: NPIC3BC7F (HP LaserJet M604)

Options Standard Custom Print Cancel

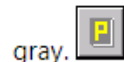
When you choose to print a document from RFMS, you will see the option to Save to PDF History.

Every time you print and all the different ways you printed it will be in PDF History

The Order in RFMS will have a history of the Printed Documents



To see the pdf history, click the **pdf** button. If there are no pdf files attached the button will be



gray.

To view the actual record, click the **view** button.

Browse PDF History

EXIT View PDF

Date Created	Time Created	Created By User	Created By Machine	Description
08/09/10	10:58 AM	KIM	KIMBERLY-DELL	Schedule Pro Work Ticket

When viewing the pdf, it can be attached to an email for electronic delivery.

Save Invoice CG#####.pdf

When printing an Invoice or Acknowledgement in Order Entry a user can select the option for, "**Save Invoice CG#####.pdf**"

In previous versions this option would automatically create and save the file in your RFMS program folder/drive. In Version 18 this changed, and the program now automatically directs the file to be created and saved in the user's Documents\RFMS_PDF folder (when using a local connection).

Please note: When connecting to RFMS through a remote connection the location is determined by how your profile path is setup. For example, the path could be similar to c:\users\username\RFMS_PDF. If you are uncertain of the path setup, please check with your local IT Professional.

Confirm Invoice Printing

Invoice

Invoice to Print: DEFAULT RFMS INVOICE

Copies: 1 ☒ Print Invoice

Invoice Date: 08/06/18 F8
Times Invoice Printed = 0

Line Grouping: Do not Subtotal

☐ Post to Batch

☒ Save "Invoice OC000009.pdf"

☐ Email PDF

☐ Save to PDF History

☒ Preview Invoice

Destination: CutePDF Writer (redirected 19)

Options Standard Custom Print Cancel

Select to Save "Invoice CG#####.pdf"

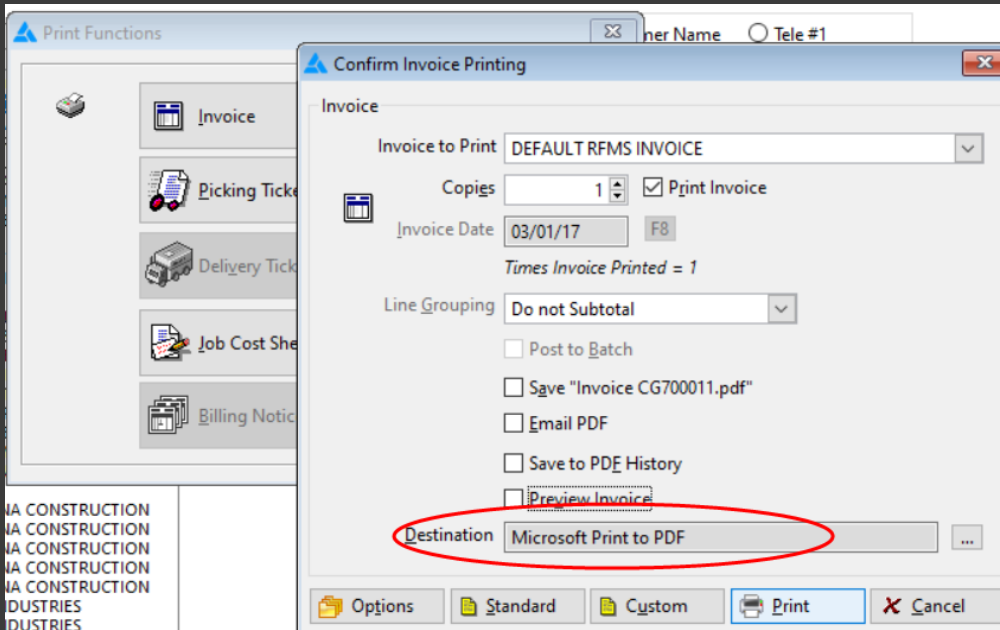
the program now automatically directs the file to be created and saved in the user's Documents\RFMS_PDF folder (when using a local connection).

Print using PDF Printer

- Instead of a physical printer, you can select a PDF in almost any Windows or Mac OS application.
- Print to PDF creates an electronic copy of your file that you can save.

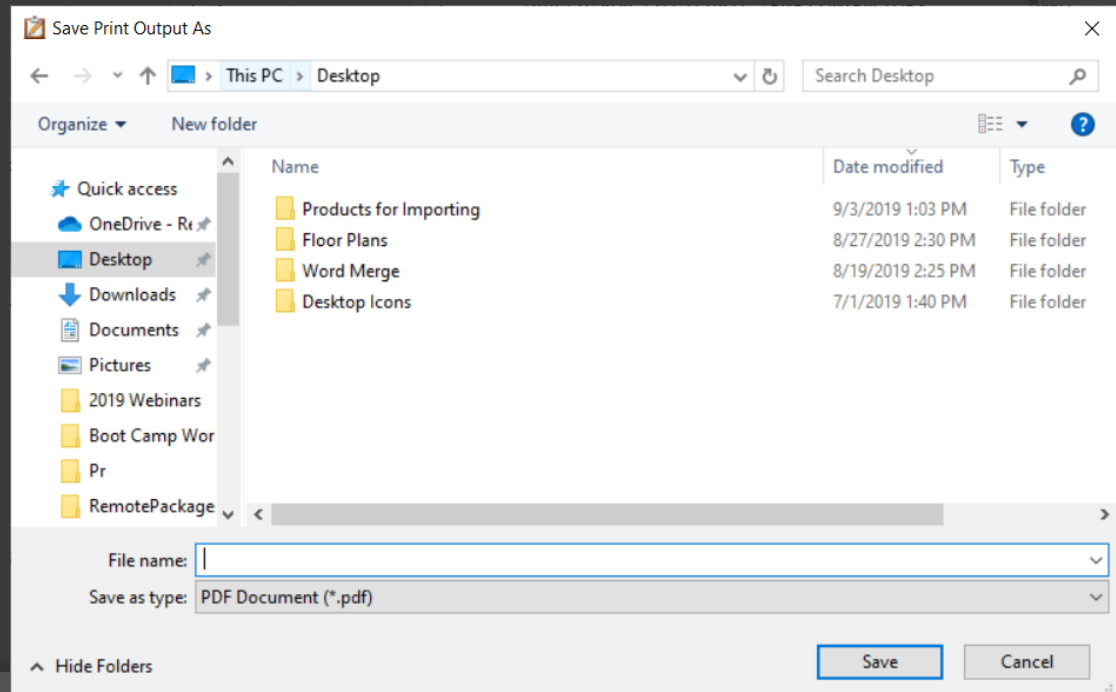
PDF Printers

- ① Find a pdf printer that suites your company.
 - Some options are free.
- ① Install the PDF printer to your computer or network.
 - You should have an IT professional assist you
- ① Set the PDF printer as your default printer.



Destination printer will default to PDF Printer

1. Choose the Destination to save your document.
2. Choose a File Name for your Document



Capture all the information first time around using RFMS Interface

- Interface mode gives the ability to make fields required, editable or hidden based on your company's needs. Interface Mode also gives the ability to determine which tabs are hidden.
- Interface Mode is available on the Edit Order, Quote, or Claim screens, Customer screen and Client Management Projects.
 - Interface will be available in Bidpro in version 19

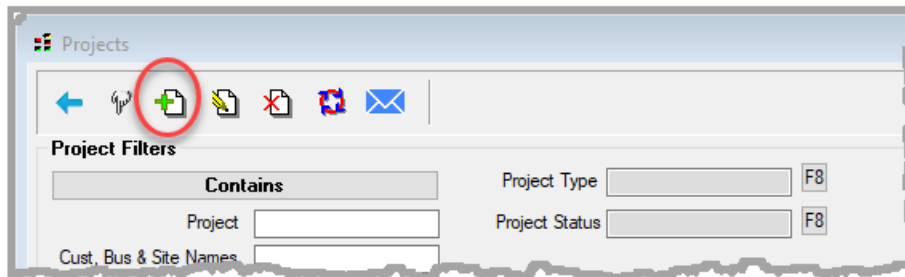
RFMS Interface

Setting up

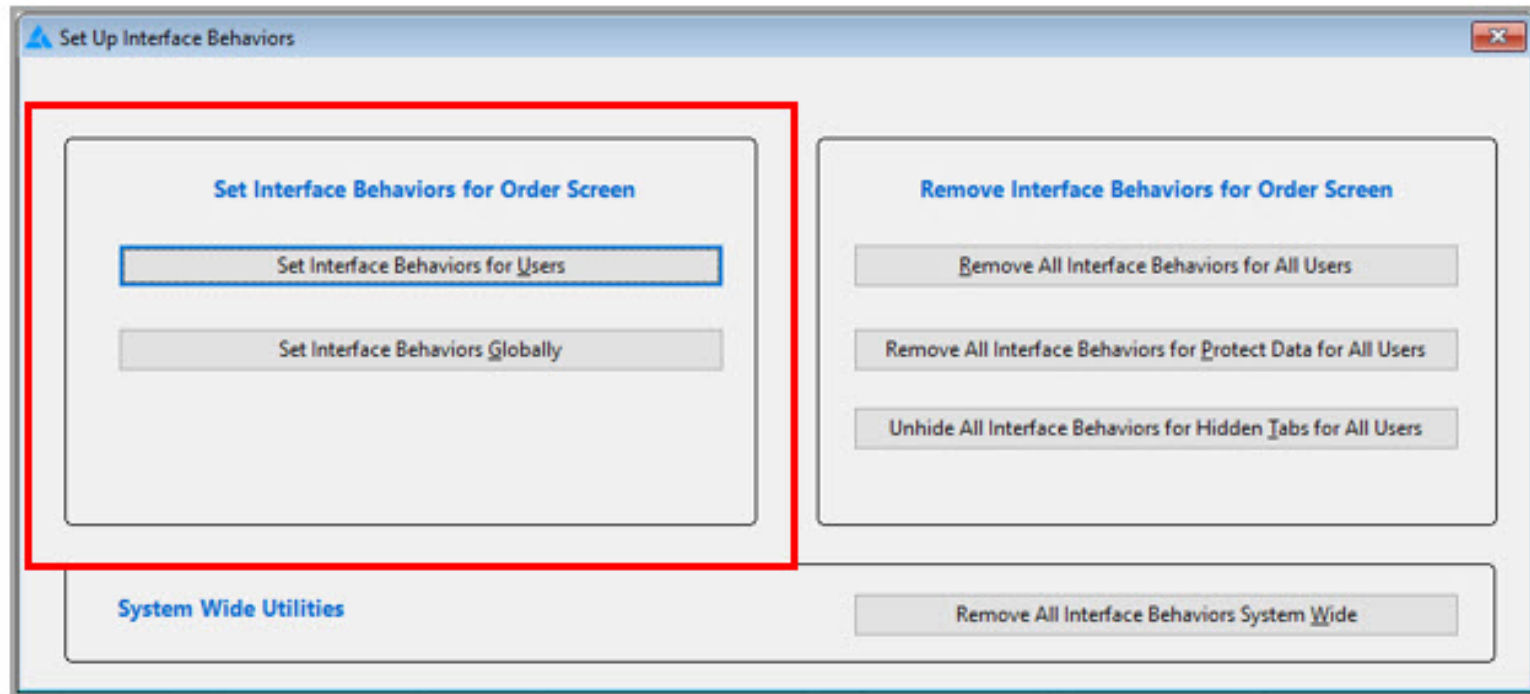
To enter Interface screen in Order Entry, click the Insert button  to create a new record (customer/order/quote) and Ctrl + Alt + F9.



In Client Management Projects, click the Insert button  on the Projects screen and Ctrl + Alt + F9.



The Set Up Interface Behaviors screen will pop up.



Set Interface Behaviors Screen

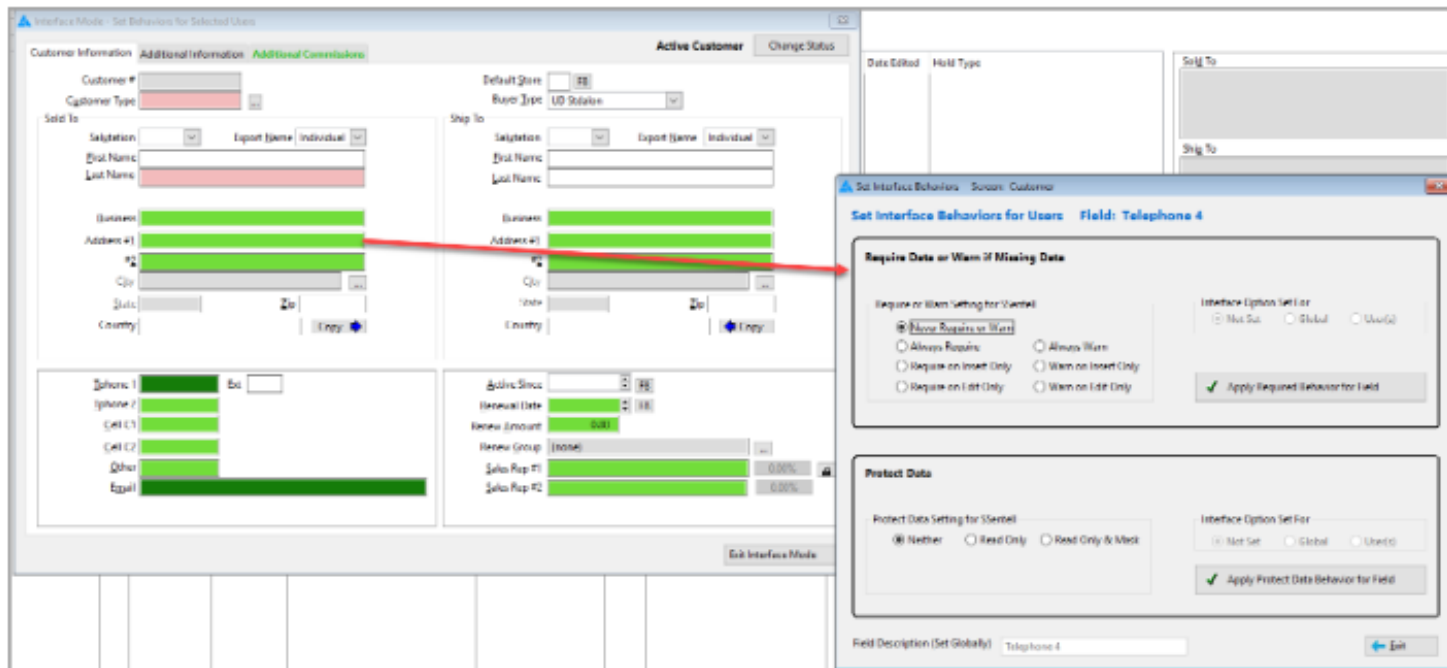
Select either to set the behaviors for Users or Globally.

The record will pop up in Interface Mode.

Fields and tabs that can be set as required/editable/hidden are highlighted in green.

The fields will be dark green if they have currently set behaviors.

The fields will be light green if no behaviors have been set.



Click the desired field and Ctrl + Alt + F to set a behavior in a field.

Click the tab and Ctrl + T to hide a tab.

The Set Interface Behaviors screen will appear.

The field that has been selected will be listed at the top of the screen.

The screenshot shows a software window titled "Set Interface Behaviors" with a subtitle "Screen: Order". The main heading is "Set Interface Behaviors for Users", and the selected field, "Field: Job Number", is circled in red. The window contains two main sections: "Require Data or Warn if Missing Data" and "Protect Data".

Require Data or Warn if Missing Data

Require or Warn Setting for SSentell

- ☒ Never Require or Warn
- ☐ Always Require
- ☐ Require on Insert Only
- ☐ Require on Edit Only
- ☐ Always Warn
- ☐ Warn on Insert Only
- ☐ Warn on Edit Only

Interface Option Set For

- ☒ Not Set
- ☐ Global
- ☐ User(s)

✓ Apply Required Behavior for Field

Protect Data

Protect Data Setting for SSentell

- ☒ Neither
- ☐ Read Only
- ☐ Read Only & Mask

Interface Option Set For

- ☒ Not Set
- ☐ Global
- ☐ User(s)

✓ Apply Protect Data Behavior for Field

Field Description (Set Globally) Job Number

← Exit

Select the choice for Require Data or Warn if Missing Data and Click Apply Required Behavior for Field.

Select the choice for Protect Data and click Apply Protect Data Behavior for Field.

Field Description can only be edited Globally. This is the name used in Required and Warning messages. It will default to the typical description. Currently some prompts can be named differently per user. If this is the case, your interface mode Field Description should include both names.

Presentation to Customers

When presenting documents to customers, RFMS has a few options to meet your needs

- RFMS Default Quote and Invoice
- RFMS Config Creator
- Word Merge

RFMS Default Quote and Invoice

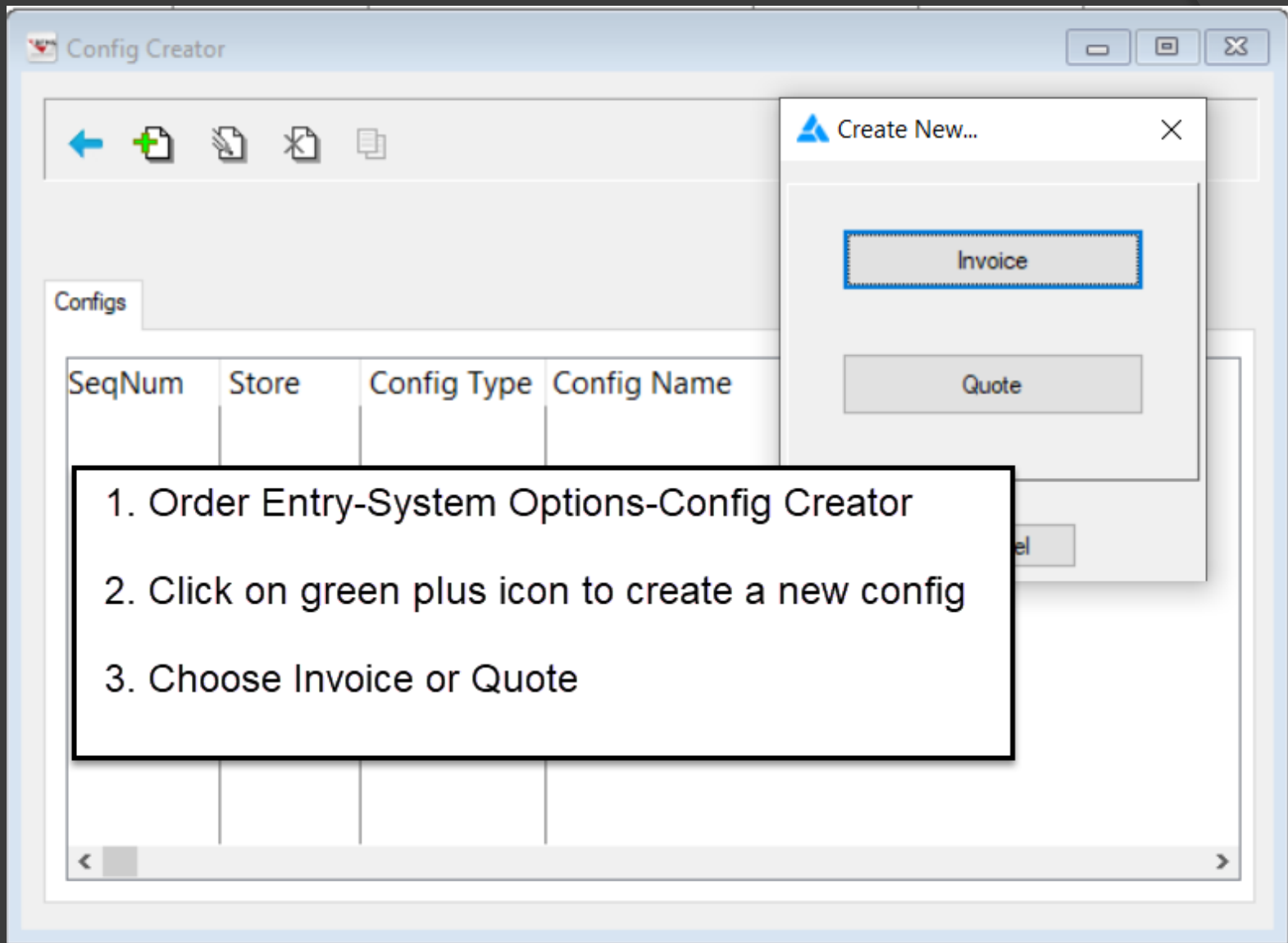
You can customize some options on the RFMS
Default Invoice or Quotes

- You can add a logo to your Quotes and Invoices
- You can customize the color boxes

	OWNER'S CONFERENCE 2017 3073 PALISADES CT TUSCALOOSA, AL 35405 205 553 5257	Page 1	SE000001
ACKNOWLEDGMENT			
Sold To MOUSE, MICKEY 12345 DISNEY WAY ANAHEIM, CA 92801	Ship To MOUSE, MICKEY 12345 DISNEY WAY ANAHEIM, CA 92801		
Order Date 09/06/19	Tele #1	PO Number	Order Number 05000001

Config Creator

This utility will allow invoices and quotes to be formatted to a company's needs. It will give the company the ability to create many different styles of invoices/acknowledgments and quotes and the choice of which one to print each time.



GeneralQuote Name:

Applicable Stores

*1"
*2"
*3"

Print RTF File After Quote (Term and

☒ Do Not Print RTF File☐ Print RTF File after quote

Select RTF File:

**Header**

Logo

☒ No Logo☐ Left Aligned

Select Logo File

Setup Company
Information**General**

*Type in the Title for the invoice

*Tag the stores that will be able to use the invoice style

*Do Not Print or Add an RTF file to the quote or invoice.
This can be used for Terms and Conditions or other documents that need to be added to an invoice.
RTF files are limited to only one page.

☒ Custom Quote Message

Save

Cancel

General

Quote Name:

Applicable Stores



Header

Logo

- ☒ No Logo
☐ Left Aligned
☐ Center Aligned
☐ Right Aligned
☐ Banner (Page Width)

Select Logo File:

F8

Setup Company
InformationSetup Header
Fields**Header**

1. Choose Logo Location
2. Choose Logo to print
3. Set up Company Information - Use Company Information from RFMS.
This information is pulled from the RFMS license.
4. Use Custom Company Information-Type the information that needs to be included in the header.

Save

Cancel

Setup Header Fields

Use Custom Document Tile- Choose the tile you want to print

Optionally select 4 or 5 fields to be printed on the invoice or quote.

Select the information to be printed by choosing the field name from the drop down list.

Field Titles: To use the field name as the column title, leave the title field blank. Type in any custom title as desired.

Setup Company
Information

Setup Header
Fields

Number of Header Fields

☐ 4

☒ 5

☒ Use Custom Document Title

SAMPLE CHECK OUT

10021

Sold To

FIRSTNAME LASTNAME
1234 ADDRESS STREET
MYTOWN, AL

Ship To

FIRSTNAME LASTNAME
1234 ADDRESS STREET
MYTOWN, AL

Select Fields for Header

Title:

Field:

Quote Number

Quote Date

Telephone 2

Telephone 1

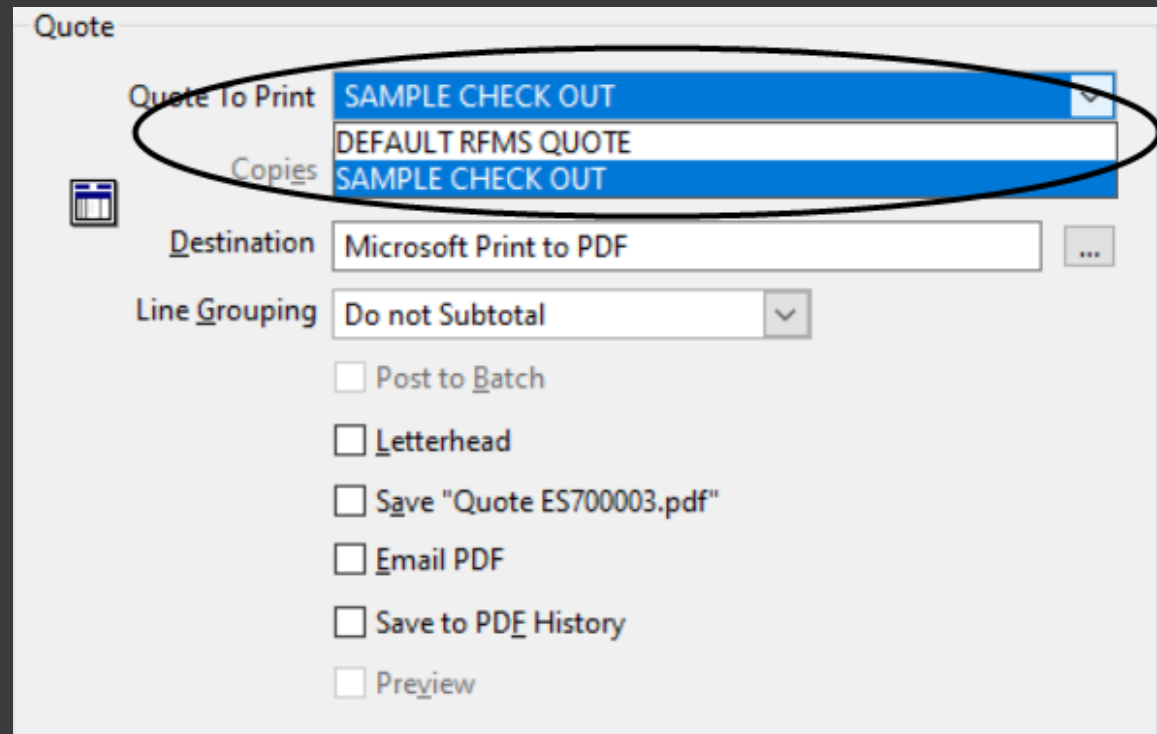
Order Type

✓ OK

✗ Cancel

Once you have created your Custom Quote or Invoice it is an option when you choose to Print.

Select the options from the Drop down menu



Quote

Quote To Print **SAMPLE CHECK OUT** ▼

Copies **DEFAULT RFMS QUOTE**

SAMPLE CHECK OUT

Destination Microsoft Print to PDF ...

Line Grouping Do not Subtotal ▼

- ☐ Post to Batch
- ☐ Letterhead
- ☐ Save "Quote ES700003.pdf"
- ☐ Email PDF
- ☐ Save to PDF History
- ☐ Preview

Word Merge

This feature exports the data from the selected records in Customer Orders, Quotes, or BidPro and creates a Microsoft Word Merge document for the Invoices, Quotes, or Estimates.

By doing this, it allows RFMS users to customize these documents by

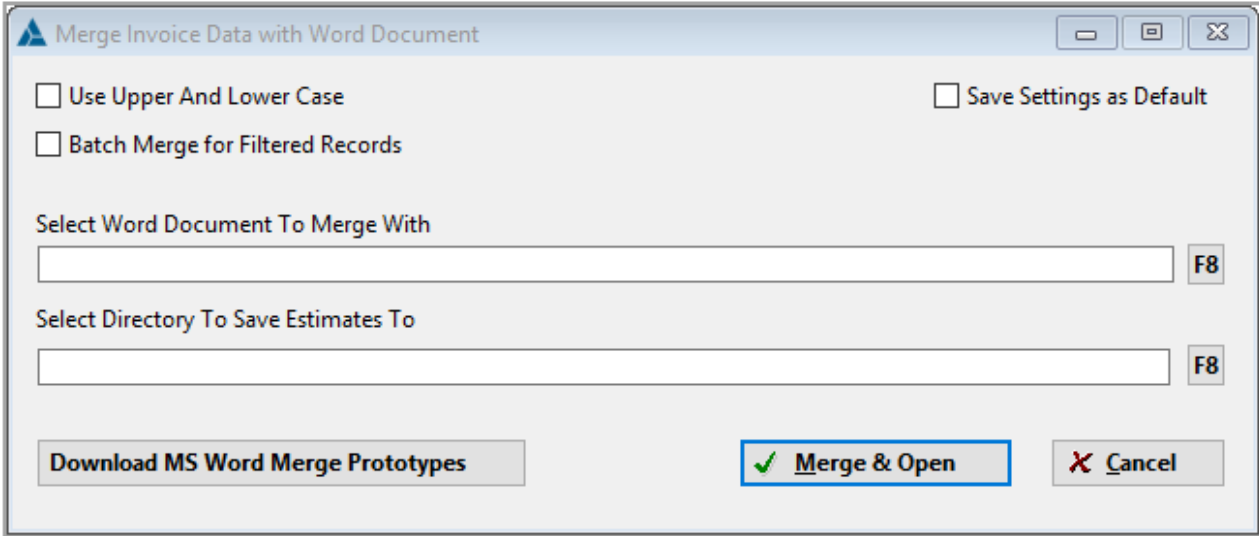
- Adding fields
- Deleting Fields
- Changing Font Style, Size and Color
- Changing the Placement of fields
- Inserting Additional Text
- Adding Supplemental Pages
- Printing multiple Quotes or Invoices at one time

To use this feature, a user must have Word 2007 or later on the workstation they are working on at the time. Also, an understanding of how to use Microsoft Word is required. RFMS will not offer support or training once the template and document are in Microsoft Word.

1. Highlight the record that is going to be exported or filter the browse screen for all the records that need to be exported.

2. Click the Word Merge icon  on the toolbar.

3. The Merge Data with Word Document screen will appear.



Merge Invoice Data with Word Document

☐ Use Upper And Lower Case ☐ Save Settings as Default

☐ Batch Merge for Filtered Records

Select Word Document To Merge With

F8

Select Directory To Save Estimates To

F8

Download MS Word Merge Prototypes Merge & Open Cancel

4. If records have been filtered, make sure the *Batch Merge for Filtered Records* box is checked.

5. Select the document to use in the *Select Word Document To Merge With* field by using F8.

6. Select where the new file should be saved once created by using F8 in the *Select Director to Save Estimates To*

7. Click Merge & Open.

8. The document can be accessed either by going to the location it has been saved to or clicking the word icon at the bottom of your screen.

Automated Reporting

RFMS Reports that can be automatically created and emailed to you using Windows task Scheduler

- ⦿ Sales Totals
- ⦿ Material Analysis
- ⦿ Job Cost Analysis
- ⦿ AR Aging

Your IT will be responsible for setting this up since this is a Windows feature.

Once you have set your parameters and saved them. Your IT professional can set up the Task Scheduler.

The screenshot shows the 'Sales Totals Report' window in the RFMS Sales Reports application. The window is titled 'Sales Totals Report' and has a menu icon in the top right corner. The main area contains several sections: 'Begin Date' (09/01/19) and 'End Date' (09/08/19) with 'F8' shortcuts; 'Sales By' (Customer Type selected) and 'Sort Order' (Volume selected); 'Stores' (1, 2, 3); 'Sales People' (Kerri Ireland selected); 'Customer Types' (Builder, Cash & Carry, Claim - Repair, Claim - Replace, Claim - Return, Commercial Designer, Education, Government, Healthcare, Hospitality, Installer, Multi-Family, Multifamily, Realtor); 'Report Type' (Delivered selected); 'Comparison Reports' (Compare selected, Weekly selected); 'Print Options' (Print Preview, Break after Store, Break After Customer Type, Output CSV To: RFMSCSV.CSV); and 'Comparison Reports' (Compare selected, Last Year, Weekly, Daily). A 'Save Current Filter' dialog box is open in the foreground, with 'Filter Name' set to 'Kerri Ireland Sales Total Report'. The 'Save' button is highlighted with a green checkmark, and the 'Cancel' button is highlighted with a red X. The 'Save' button in the main window is also circled in red.

1. Open the Reports Menu

2. Choose the Parameters

3. Click the Save Option and Name your Parameter settings

4. You can load each parameter setting as needed

Filter Name: Kerri Ireland Sales Total Report

Save Cancel

Clear Save Load Print Exit