

Product Showcase: RFMS Next

Webinar #2



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The future is now



**RFMS Next is the Future of
RFMS!**



The future is now

RFMS Next is the Future of RFMS!

- Browser based application
- Communicates to current database





Today's Webinar



Access RFMS Next

- Fill out request form
- Set up Users
- URL link



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Set up Users in ROS account

- Map users in RFMS Online services – Users Tile
- Verify RFMS Next access



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Set up Users in ROS account

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Users & Groups

- Quickly create permission groups for user roles

What do I need to do to obtain access to RFMS Next?

- Must be a current subscriber to RFMS ERP
- Fill out the RFMS Next Access Request Form

How do control access to RFMS Next?

- RFMS System Options
 - User must be in RFMS Core
 - Checking Account Numbers Visible to User

How do control access to RFMS Next?

- Map user in RFMS Online Services

Other Permitted Apps (if licensed to your company)

- ☒ RFMS Mobile
- ☒ RFMS CRM
- ☒ Measure Mobile
- ☒ RFMS NEXT
- ☒ Warehouse

Corresponding RFMS User
Klreland

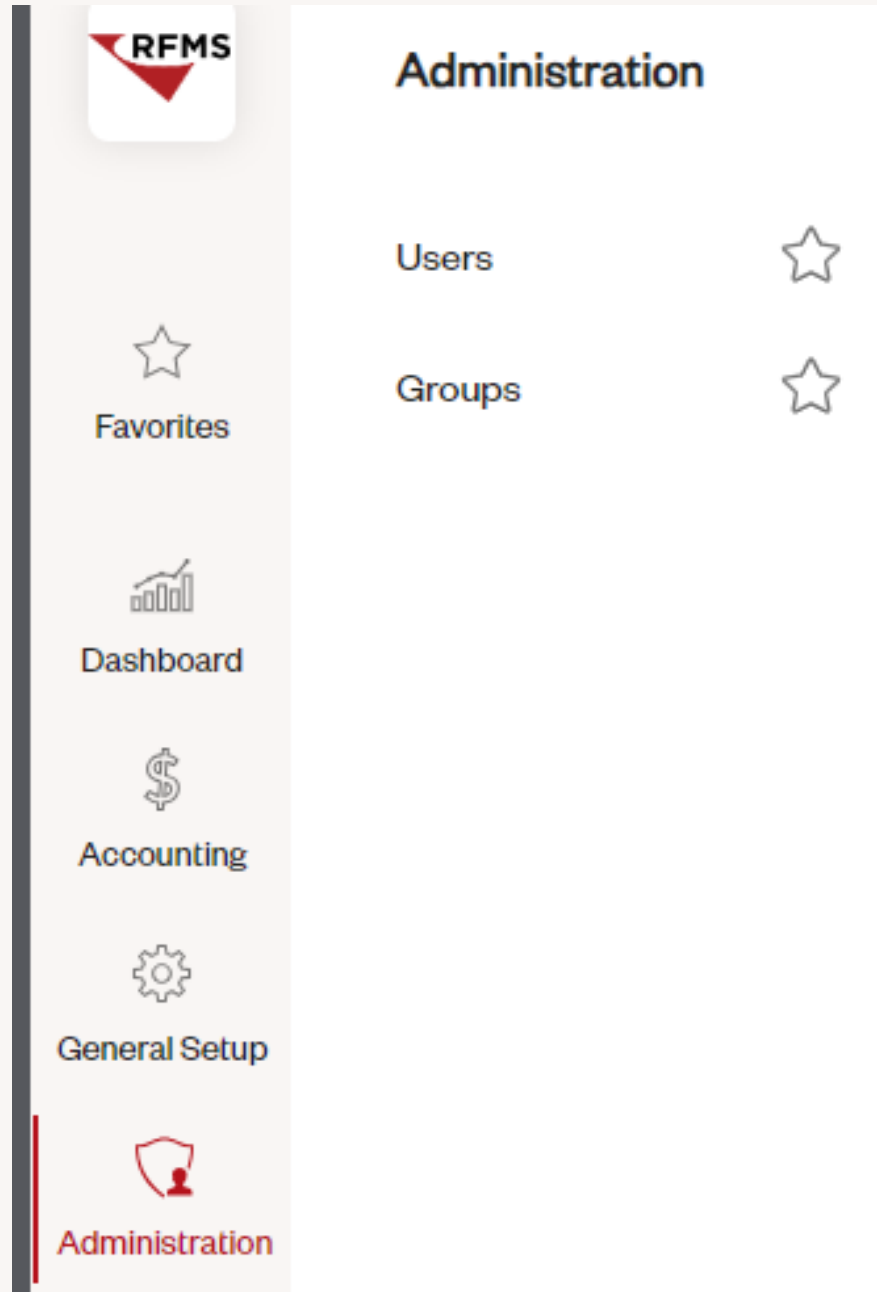
RFMS Salesperson
▼ KERRI IRELAND

How do I log into RFMS Next?

- Go to www.rfms.online
- Log in with your email and password set up in ROS

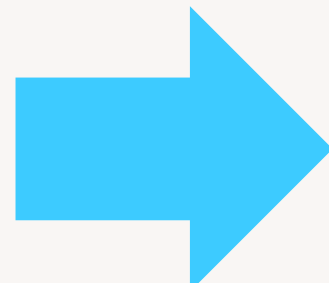


Set up Groups and Users Roles in RFMS Next





Set up Groups and Users Roles in RFMS Next



Favorites



Dashboard



Accounting



General Setup



Administration

Administration

Users

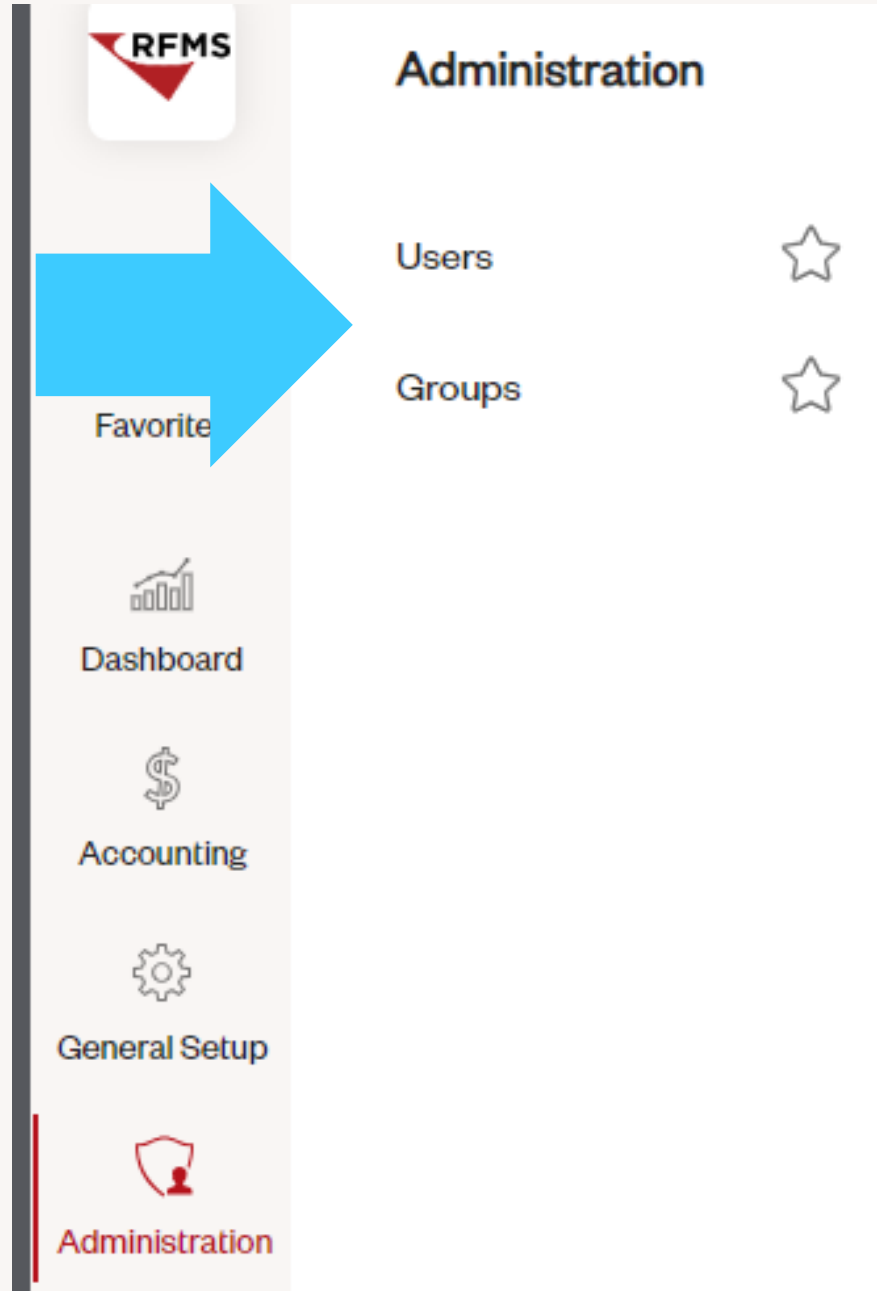


Groups





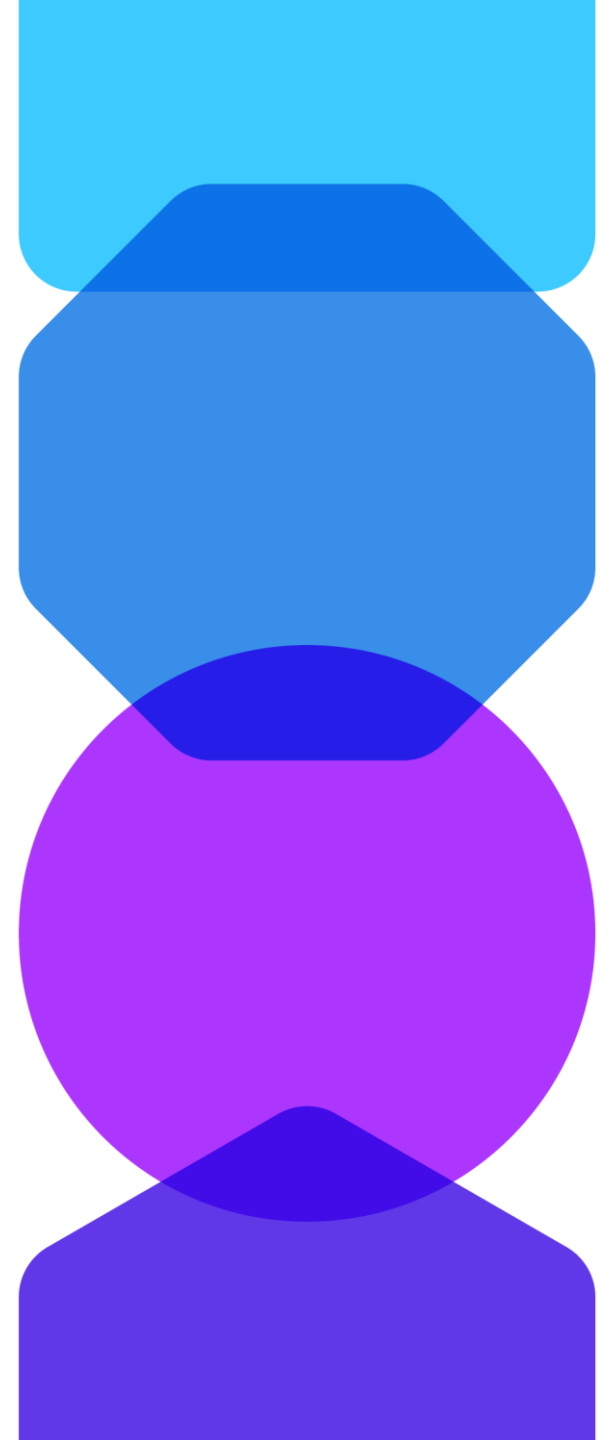
Set up Groups and Users Roles in RFMS Next



Default Groups

- Owners Dashboard
- Admins – full access to each module*

*(except checking accounts which still need to be turned on in System Options in Core)



Set up Groups in RFMS Next?



How to Add a New Group

The screenshot shows the 'New Group' form in the RFMS application. The breadcrumb trail is 'Administration > Group > New Group'. The toolbar contains 'Save', 'Save & Add New', and 'Cancel' buttons. The form includes a 'Group Name' text field (callout 2), a 'Permissions' section with an 'ADD ROW' button (callout 3), a 'Resource ID' dropdown menu (callout 4), and a table for permissions (callout 5). The table has columns for 'View', 'Update', 'Create', 'Delete', and 'Execute', each with a checkbox. A red box highlights the 'Create' column and its checkbox.

Resource ID *	View	Update	Create	Delete	Execute
Select a value...	☐	☐	☐	☐	☐

1. Select the **+ Add** button in the toolbar.
2. Enter the Group name
3. Add a row for permissions
4. Select a module, screen, or field using the dropdown.
5. Check the boxes to allow access.
6. Click **Save** or **Save & Add New** to add the group and save changes.

Set up Users in RFMS Next?



Users must be assigned to a group in order to use RFMS NEXT. For more information about groups please see the article [How to Use Groups](#).

The Users screen shows your complete list of users and include their email address, name, and phone number. What columns you choose to see in the browse window are customizable under the [Sort and Filter Options list](#).

Users

Administration > Users

View Print Preview

REFRESH

Email	Name	Phone
abailey@withaname.com	Anthony Bailey	
mcarter@withaname.com	Martin Carter	
mgonzalez@withaname.com	Mildred Gonzalez	
msimmons@withaname.com	Marie Simmons	
nlflores@withaname.com	Nicholas Flores	
pgonzalez@withaname.com	Philip Gonzalez	
ssadler@withaname.com	Seraphina Sadler	
wnelson@withaname.com	Wanda Nelson	

Record count: 17

Preview

Email
abailey@withaname.com

Name
Anthony Bailey

Accounting

Accounts Payable:

- Search, edit & add payables
- Print multiple or single checks
- Mark bills paid

Accounts Payable

Adding a payable:

Accounts Payable

Accounting > Accounts Payable

+ Add

View

Download

Print

Search

Flag	Supplier ^	Invoice #	Invoice Date	Due Date	Check #	Checking Account	Total	Discountable	Non Discountable	Discount Rate	Transaction Date	Order Applied
------	------------	-----------	--------------	----------	---------	------------------	-------	--------------	------------------	---------------	------------------	---------------

Accounts Payable

Tagging and Printing Flagged Checks:

Accounts Payable

Accounting > Accounts Payable

+ Add

View

Download

Print

Search

Flag	Supplier ^	Invoice #	Invoice Date	Due Date	Check #	Checking Account	Total	Discountable	Non Discountable	Discount Rate	Transaction Date	Order Applied
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COMING SOON

RFMS Next Release Roadmap

Next Roadmap | September 2023 thru January 2024*



Objectives

- Owner Dashboard
- Accounting



Next Roadmap | September 2023 thru January 2024*



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- Owner Dashboard
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• September 20

- User/Group Enhancements
- Keyboard Shortcuts
- Custom Filters
- AP Reports

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• November 29

- Manual Costing (Both EC and Regular)
- Electronic Funds Transfer

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- **December 27**

- Automated Costing

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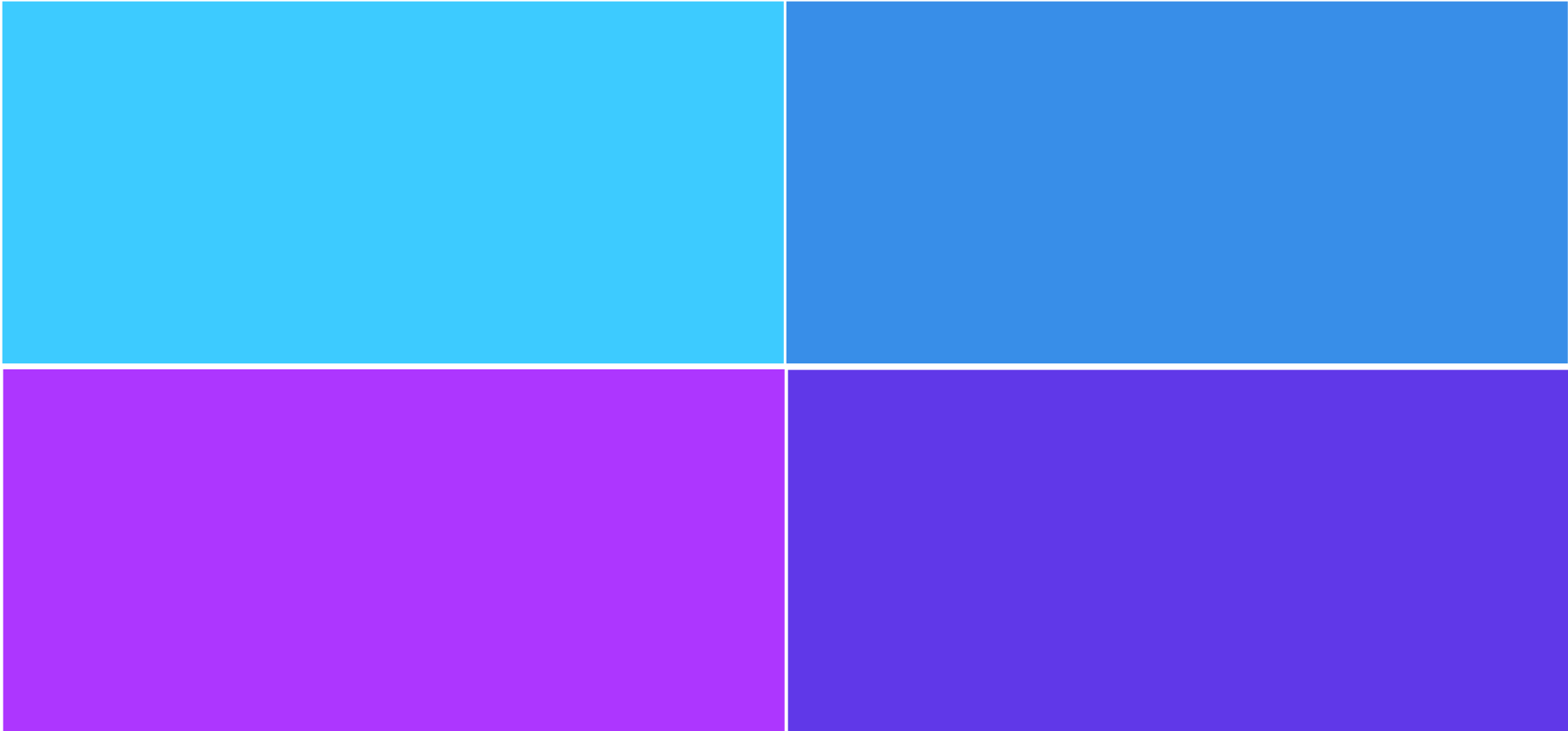
- Bank Transfers
- Multi-Pay
- Receipt Recap Report
- AR Reports
- Journal Close



Next Roadmap | 2024*

Objectives

- Order Entry
- Inventory
- Scheduling
- Products





Next Roadmap | 2024*

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- Order Entry
- Inventory
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Q1

- Point of Sale
- Payment Processing
- Products View/Edit
- 2020 Integration
- Schedule Jobs



Next Roadmap | 2024*

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- Order Entry
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Q1 ○ Point of Sale ○ Payment Processing ○ Products View/Edit ○ 2020 Integration ○ Schedule Jobs	
Q2 ○ Inventory View/Edit ○ Stock Adjustments/Reservation ○ Quote & Order Create/Manage ○ Products ○ B2B ○ Purchase Orders ○ Price Management	



Next Roadmap | 2024*

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- Order Entry
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Q1

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Q3

- Billing Groups
- Customer Facing Portal
- Inventory
 - Receiving and Put Away
 - Batch Allocation
 - Barcoding and Scanning

Q2

- Inventory View/Edit
- Stock Adjustments/Reservation
- Quote & Order Create/Manage
- Products
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 - Price Management



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Q2

- Inventory View/Edit
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 - Purchase Orders
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Q4

- Inventory
 - Returns
 - Reports
- Products
 - Reports

RFMS
A Cyncly Company

