

Product Showcase: RFMS Next

Webinar #3



Tony Cargill

Training & Implementation Specialist

Tony.cargill@cyncly.com



cyncly.com



Today's Webinar



Accessing RFMS Next

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



Setting up Users in ROS account

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



Managing Users & Groups

- Quickly create permission groups for user roles



Today's Webinar



Creating Accounts Payable

- Create Payable
- Flag Payables
- Print Checks



Accounts Payable Reports

- Review the AP reports that are now available
- Print Preview, Print, and Save as PDF

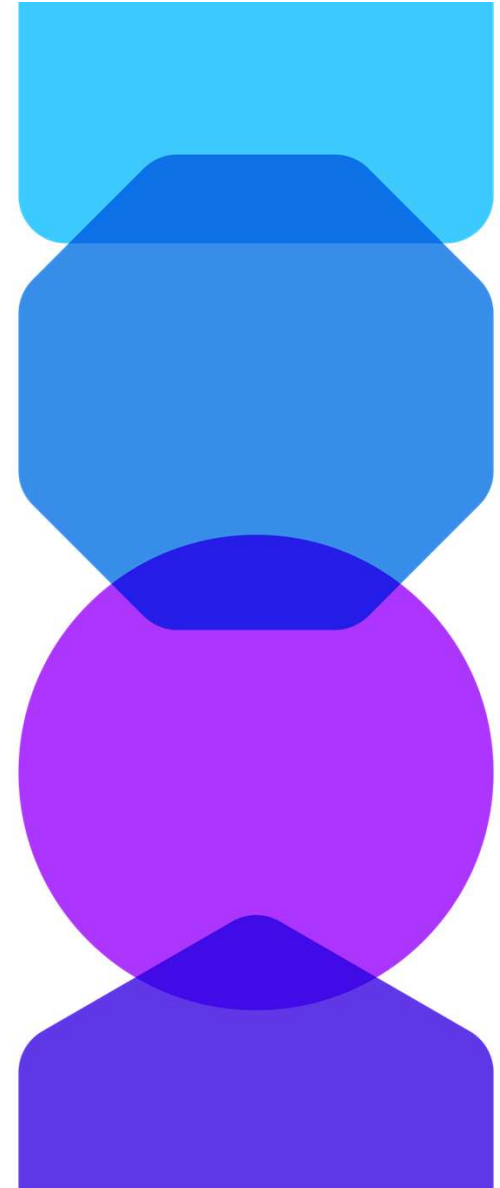


Working with CRM

- Customer File – view, add and edit the customer file
- View communication center

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)

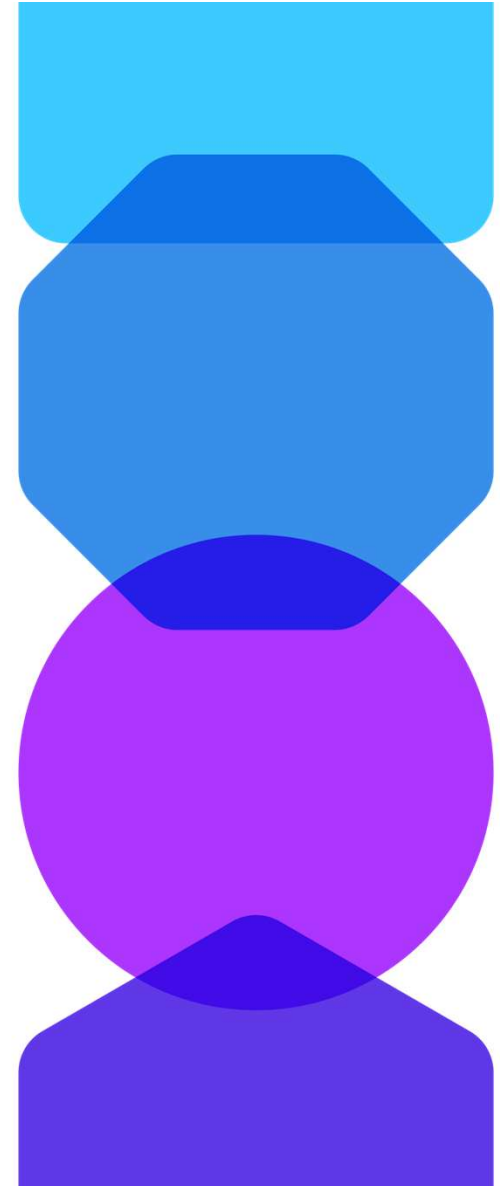
- ☒ RFMS Mobile
- ☒ RFMS CRM
- ☒ Measure Mobile

☒ RFMS NEXT

☒ Warehouse

Corresponding RFMS User
Kireland

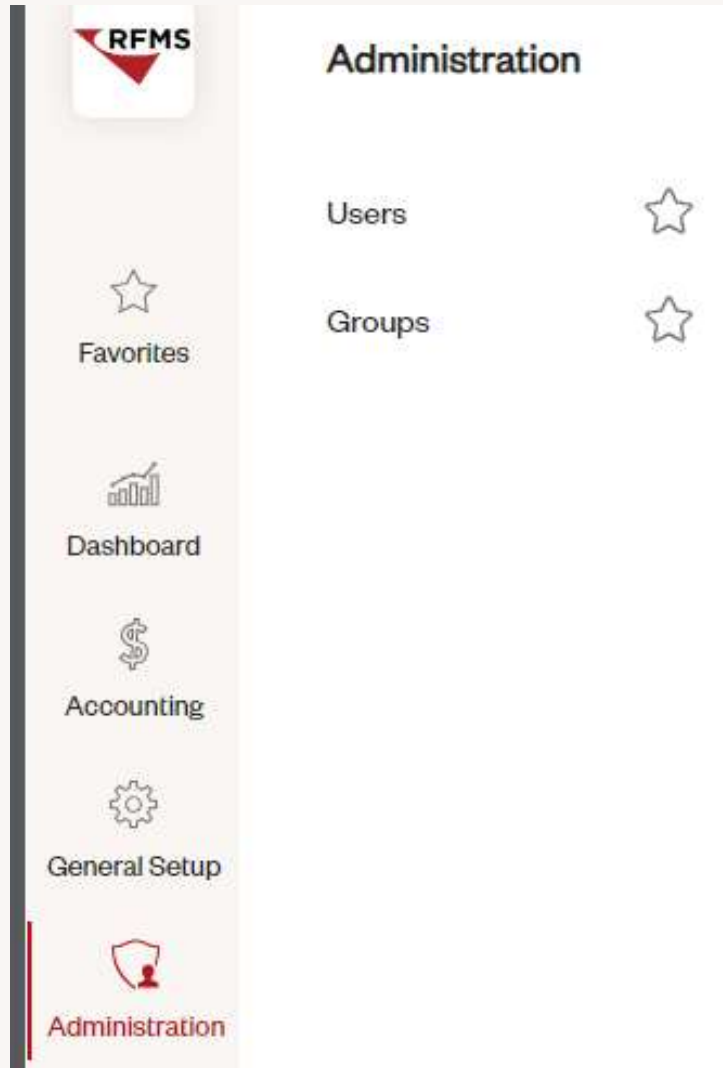
RFMS Salesperson
▼ KERRI IRELAND



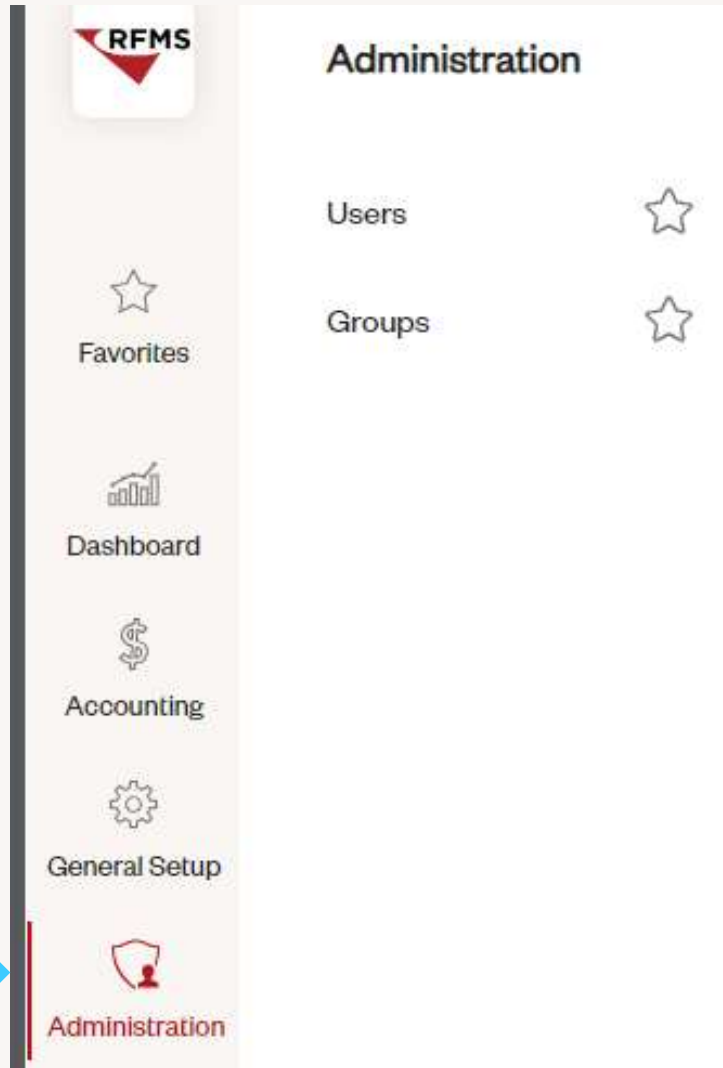
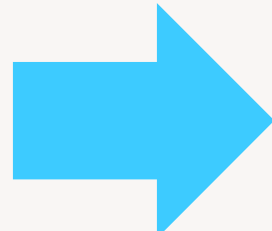
How do I log into RFMS Next?

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

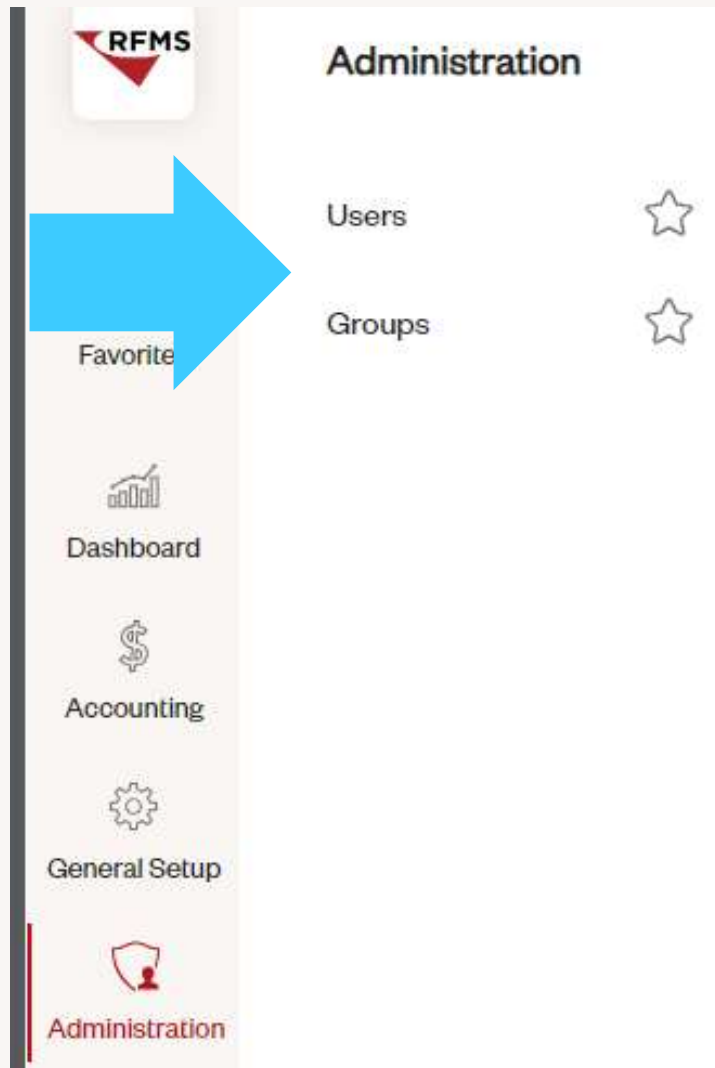
Set up Groups and Users Roles in RFMS Next



Set up Groups and Users Roles in RFMS Next



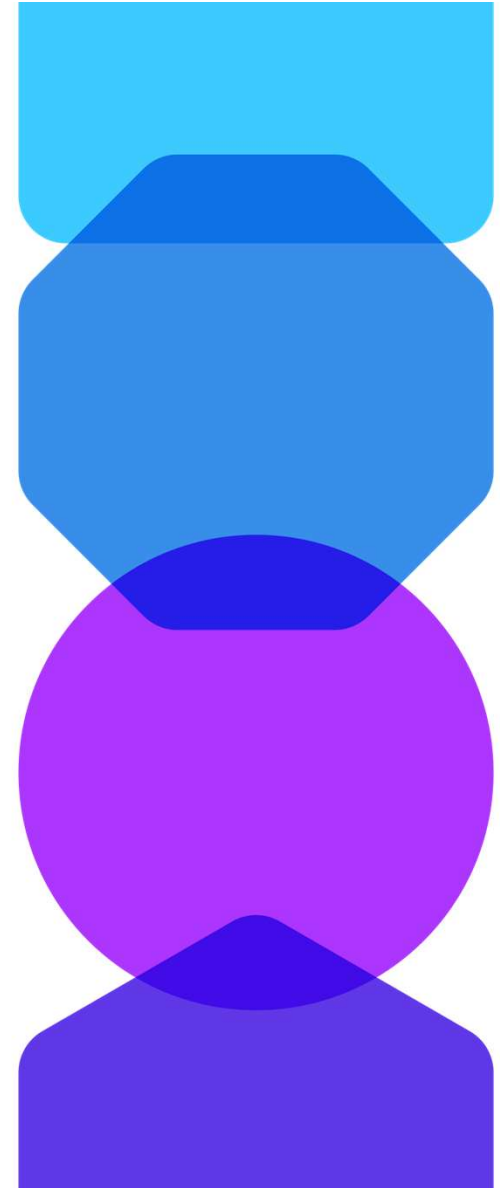
Set up Groups and Users Roles in RFMS Next



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 & AP Reports)



Set up Groups in RFMS Next?



How to Add a New Group

The screenshot shows the 'New Group' form in the RFMS application. The form is titled 'Administration > Group > New Group' and includes buttons for 'Save', 'Save & Add New', and 'Cancel'. The form fields are as follows:

- Group Name:** A text input field with a red circle '2' next to it.
- Permissions:** A section with a red circle '3' next to it, containing a table with columns for 'View', 'Update', 'Create', 'Delete', and 'Execute'. A red circle '5' is next to the 'Create' column header.
- Resource ID:** A dropdown menu with a red circle '4' next to it, showing 'Select a value...'.

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](#).

☆ Favorites

Dashboard

Accounting

General Setup

Administration

Help

Settings

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	
nflores@withaname.com	Nicholas Flores	
pgonzalez@withaname.com	Philip Gonzalez	
ssadler@withaname.com	Seraphina Sadler	
wnelson@withaname.com	Wanda Nelson	

Email

abailey@withaname.com

Name

Anthony Bailey

Record count: 17

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	Disountable	Non Disountable	Disount Rate	Transaction Date	Order Applied
------	------------	-----------	--------------	----------	---------	------------------	-------	-------------	-----------------	--------------	------------------	---------------

Ci

Accounts Payable

Accounting Reports

Tony Cargill

Payables By Supplier

Accounting > Accounting Reports > Payables By Supplier

Submit X Reset

Report Category

Account Payables

Report Type

Payables By Supplier

Payables By Supplier

Accounts Payable Paid By Account Code

Accounts Payable Totals

Accounts Payable Paid By Check

Accounts Payable Paid Online

Top 10 Material Vendors

Supplier

☒ Open Only

☐ Include Hold

Due Date From

MM/DD/YYYY

Due Date To

MM/DD/YYYY

Transaction Date From

MM/DD/YYYY

Transaction Date To

MM/DD/YYYY

Invoice Date From

MM/DD/YYYY

Invoice Date To

MM/DD/YYYY

Accounts Payable

Accounting Reports – Payables by Supplier

Payables By Supplier

Accounting > Accounting Reports > Payables By Supplier

Submit X Reset

Report Category

Account Payables

Report Type

Payables By Supplier

Report Parameters

☐ Summary

Group Sorts

Supplier

Stores

[*] RFMS CLOUD

Supplier

SHAW INDUSTRIES, INC.

☒ Open Only

☒ Include Hold

Due Date From

01/01/1980

Due Date To

12/31/2079

Transaction Date From

MM/DD/YYYY

Transaction Date To

MM/DD/YYYY

Invoice Date From

MM/DD/YYYY

Invoice Date To

MM/DD/YYYY

Accounts Payable

Accounting Reports – Payables by Supplier

1/1									
RFMS TRAINING SERVER									
10/11/2023 6:25:59 PM									
Payables By Supplier									
SHAW INDUSTRIES, INC									
Invoice Number	Invoice Date	Trans. Date	Due Date	Invoice Amount	Discount Percent	Discount Amount	Non Disc. Amount	Amount Due	Status
123456	9/13/2023	9/6/2023	9/26/2023	\$5,000.00	5.00%	\$250.00	\$0.00	\$4,750.00	Open
232685	8/6/2023	8/7/2023	8/6/2023	\$4,041.83	5.00%	\$200.00	\$41.75	\$3,841.83	Open
232685/S01	8/6/2023	8/7/2023	9/26/2023	\$4,041.82	5.00%	\$200.00	\$41.75	\$3,841.82	Open
232685/S02	8/6/2023	8/7/2023	10/26/2023	\$4,041.83	5.00%	\$200.00	\$41.75	\$3,841.83	Open
3456789	3/23/2023	3/24/2023	4/12/2023	\$690.68	5.00%	\$34.53	\$0.00	\$656.15	Open
3456789-1	7/20/2023	7/20/2023	8/9/2023	\$582.30	5.00%	\$24.17	\$99.00	\$558.13	Open
908765	10/2/2023	10/2/2023	10/22/2023	\$1,054.50	2.00%	\$19.40	\$75.00	\$1,035.10	Open
Supplier Total:				\$19,452.96		\$928.10	\$299.25	\$18,524.86	
Grand Total:				\$19,452.96		\$928.10	\$299.25	\$18,524.86	

Accounts Payable

Accounting Reports – Accounts Payable Paid by Account Code

Tony Cargill

Accounts Payable Paid By Account Code

Accounting > Accounting Reports > Accounts Payable Paid By Account Code

Submit X Reset

Report Category

Account Payables

Report Type

Accounts Payable Paid By Account Code

Report Parameters

☐ Summary

Stores

I*1 RFMS CLOUD X

☐ Combine Stores

Supplier

Account Codes

140 - INVENTORY X

Checking Accounts

114 - OHIO TEST BANK X

Date Paid From

01/01/2023 X

Date Paid To

10/11/2023 X

Accounts Payable

Accounting Reports – Accounts Payable Paid by Account Code

1/210/11/2023 6:46:59 PM

RFMS TRAINING SERVER

Accounts Payable Paid By Account Code

From: 1/1/2023 To: 10/11/2023

Store: [] RFMS CLOUD

Account Code: 140 INVENTORY

Sub-Account Code: 1 CARPET

Supplier	Invoice Number	Invoice Date	Transaction Date	Paid Date	Check Number	Checking Account	Gross Amount
AAB	AAB	2/4/2014	2/4/2014	10/11/2023	ONLINE	114	\$32.00
ABC	K001	2/20/2018	6/29/2018	10/3/2023	69	114	\$1,800.00
MOHAWK BILLING	91883838	7/10/2023	7/20/2023	7/20/2023	ONLINE	114	\$191.72
MOHAWK CARPET CORPORATION	56789	6/19/2023	6/19/2023	6/19/2023	ONLINE	114	\$442.79
MOHAWK-BILLING	76473290	2/22/2023	2/22/2023	2/22/2023	55	114	\$937.53
PHENIX FLOORING	5473289	2/2/2023	2/22/2023	2/22/2023	ONLINE	114	\$274.33
SHAW	123435	9/7/2023	9/7/2023	10/3/2023	ONLINE	114	\$360.00
SHAW BILLING	3213255-A	2/17/2014	2/17/2014	10/11/2023	ONLINE	114	\$1,699.96
Sub-Account Total :							\$5,738.33

Sub-Account Code: 11 VINYL TILE/SUPPLIES

Supplier	Invoice Number	Invoice Date	Transaction Date	Paid Date	Check Number	Checking Account	Gross Amount
SOUTHERN WHOLESALE	4738229	2/22/2023	2/22/2023	2/22/2023	56	114	\$644.03
Sub-Account Total :							\$644.03

2/210/11/2023 6:46:59 PM

RFMS TRAINING SERVER

Accounts Payable Paid By Account Code

From: 1/1/2023 To: 10/11/2023

Sub-Account Code: 25 GRANITE

Supplier	Invoice Number	Invoice Date	Transaction Date	Paid Date	Check Number	Checking Account	Gross Amount
DAL TILE	387872	5/30/2017	5/30/2017	7/5/2023	ONLINE	114	\$1,000.00
Sub-Account Total :							\$1,000.00

Sub-Account Code: 8 SUPPLIES

Supplier	Invoice Number	Invoice Date	Transaction Date	Paid Date	Check Number	Checking Account	Gross Amount
TOM DUFFY COMPANY	678904	6/1/2023	6/1/2023	6/1/2023	61	114	\$86.24
Sub-Account Total :							\$86.24
Account Total :							\$7,468.60
Total For Store: [] RFMS CLOUD							\$7,468.60
Grand Total Gross Amount:							\$7,468.60

Accounts Payable

Accounting Reports – Accounts Payable Totals

Accounts Payable Totals

Accounting > Accounting Reports > Accounts Payable Totals

Submit

Reset

Auto Fill

Report Category

Account Payables

Report Type

Accounts Payable Totals

Report Parameters

	Begins On	Ends On	# of Days
Period #1	01/01/2023	01/30/2023	30
Period #2	01/31/2023	03/01/2023	30
Period #3	03/02/2023	03/31/2023	30
Period #4	04/01/2023	04/30/2023	30
Period #5	05/01/2023	05/30/2023	30
Period #6	05/31/2023	06/29/2023	30
Period #7	06/30/2023	07/29/2023	30
Period #8	07/30/2023	08/28/2023	30
Period #9	08/29/2023	09/27/2023	30
Period #10	09/28/2023	12/31/2079	20549

Accounts Payable

Accounting Reports

1/1

RFMS TRAINING SERVER

10/11/2023 6:33:15 PM

Accounts Payable Due

Period Beginning	Period Ending	Invoice Totals	Eligible Discounts	Net Due
* All Payables Due (including those with Hold Status)				
1/1/1980	12/31/2079	\$62,562,092.78	\$20,220.36	\$62,541,872.42
* All Payables Due (excluding those with Hold Status)				
1/1/1980	12/31/2022	\$1,263,470.31	\$18,102.58	\$1,245,367.73
1/1/2023	1/30/2023	\$12,460.74	\$7.50	\$12,453.24
1/31/2023	3/1/2023	\$47,612.87	\$618.96	\$46,993.91
3/2/2023	3/31/2023	\$19,328.85	\$137.89	\$19,190.96
4/1/2023	4/30/2023	\$4,605.38	\$109.28	\$4,496.10
5/1/2023	5/30/2023	\$8,986.16	\$6.58	\$8,979.58
5/31/2023	6/29/2023	\$2,130.00	\$0.00	\$2,130.00
6/30/2023	7/29/2023	\$4,459.27	\$32.25	\$4,427.02
7/30/2023	8/28/2023	\$6,603.76	\$244.58	\$6,359.18
8/29/2023	9/27/2023	\$58,750.98	\$452.50	\$58,298.48
9/28/2023	12/31/2079	\$61,133,684.46	\$508.24	\$61,133,176.22
* Total Payables Due				
1/1/1980	12/31/2079	\$62,562,092.78	\$20,220.36	\$62,541,872.42

Accounts Payable

Accounting Reports – Accounts Payable Paid by Check

Tony Cargill

Accounts Payable Paid By Check

Accounting > Accounting Reports > Accounts Payable Paid By Check

Submit X Reset

Report Category

Account Payables

Report Type

Accounts Payable Paid By Check

Report Parameters

☐ Summary

Supplier

Checking Accounts

114 - OHIO TEST BANK

Check Number From

65

Check Number To

68

Accounts Payable

Accounting Reports – Accounts Payable Paid by Check

1/1

Press **Esc** to exit full screen

10/11/2023 6:55:37 PM

RFMS TRAINING SERVER

Accounts Payable Paid By Check Number

From: 65 To: 68

Account Number: 114 OHIO TEST BANK
Check Number: 67

Supplier	Invoice Number	Inv. Date	Paid Date	GL Act.	Sub Code	Gross Amount	Disc. Taken	Net Amount
ALABAMA POWER	66543	10/27/2023	10/3/2023	580	0	\$378.65		
Check Total:						\$378.65	\$0.00	\$378.65

Check Number: 68

Supplier	Invoice Number	Inv. Date	Paid Date	GL Act.	Sub Code	Gross Amount	Disc. Taken	Net Amount
A.T.D.	741001/S01001	9/27/2012	10/3/2023	132	80	\$3,750.00		
A.T.D.	FDSAD	3/9/2023	10/3/2023	555	0	\$150.00		
Check Total:						\$3,900.00	\$187.50	\$3,712.50
Grand Total:						\$4,278.65	\$187.50	\$4,091.15

Accounts Payable

Accounting Reports – Accounts Payable Paid Online

Tony Cargill

Accounts Payable Paid Online

Accounting > Accounting Reports > Accounts Payable Paid Online

Submit X Reset

Report Category

Account Payables

Report Type

Accounts Payable Paid Online

Report Parameters

☐ Summary

Supplier

Checking Accounts

114 - OHIO TEST BANK X

Date Paid Online From

01/01/2023

Date Paid Online To

10/11/2023

Accounts Payable

Accounting Reports – Accounts Payable Paid Online

1/2

10/11/2023 6:59:57 PM

RFMS TRAINING SERVER

Accounts Payable Paid Online

From: 1/1/2023 To: 10/11/2023

Account Number: 114 OHIO TEST BANK

ONLINE

Supplier	Invoice Number	Inv. Date	Paid Date	GL Act.	Sub Code	Gross Amount	Disc. Taken	Net Amount
AAB	AAB	2/4/2014	10/11/2023	140	1	\$32.00		
Total:						\$32.00	\$0.00	\$32.00

ONLINE

Supplier	Invoice Number	Inv. Date	Paid Date	GL Act.	Sub Code	Gross Amount	Disc. Taken	Net Amount
DAL TILE	387872	5/30/2017	7/5/2023	140	25	\$1,000.00		
Total:						\$1,000.00	\$0.00	\$1,000.00

ONLINE

Supplier	Invoice Number	Inv. Date	Paid Date	GL Act.	Sub Code	Gross Amount	Disc. Taken	Net Amount
PHENIX FLOORING	5473289	2/2/2023	2/22/2023	140	1	\$274.33		
Total:						\$274.33	\$0.00	\$274.33

ONLINE

Supplier	Invoice Number	Inv. Date	Paid Date	GL Act.	Sub Code	Gross Amount	Disc. Taken	Net Amount
MOHAWK CARPET CORPORATION	56789	6/19/2023	6/19/2023	140	1	\$442.79		
Total:						\$442.79	\$0.00	\$442.79

2/2

10/11/2023 6:59:57 PM

RFMS TRAINING SERVER

Accounts Payable Paid Online

From: 1/1/2023 To: 10/11/2023

ONLINE

Supplier	Invoice Number	Inv. Date	Paid Date	GL Act.	Sub Code	Gross Amount	Disc. Taken	Net Amount
MOHAWK BILLING	91883838	7/10/2023	7/20/2023	140	1	\$191.72		
MOHAWK BILLING	91883838	7/10/2023	7/20/2023	451	0	\$100.00		
Total:						\$291.72	\$0.00	\$291.72

ONLINE

Supplier	Invoice Number	Inv. Date	Paid Date	GL Act.	Sub Code	Gross Amount	Disc. Taken	Net Amount
SHAW	123435	9/7/2023	10/3/2023	140	1	\$360.00		
SHAW	123435	9/7/2023	10/3/2023	451	0	\$100.00		
Total:						\$460.00	\$0.00	\$460.00

Grand Total:

						\$4,200.80	\$0.00	\$4,200.80
--	--	--	--	--	--	------------	--------	------------

Accounts Payable

Accounting Reports – Top 10 Material Vendors

Tony Cargill

Top 10 Material Vendors

Accounting > Accounting Reports > Top 10 Material Vendors

Submit X Reset

Report Category

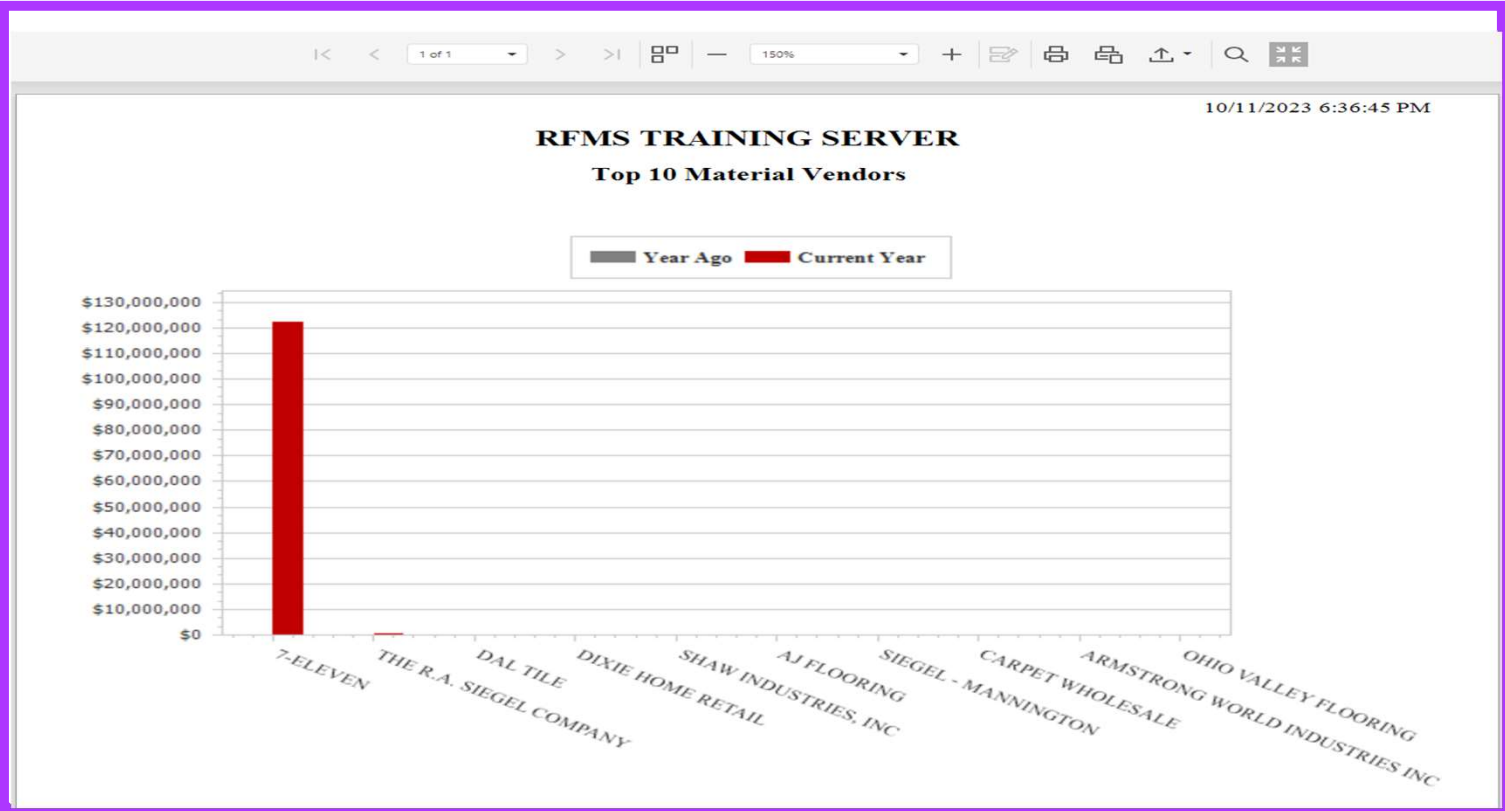
Account Payables

Report Type

Top 10 Material Vendors

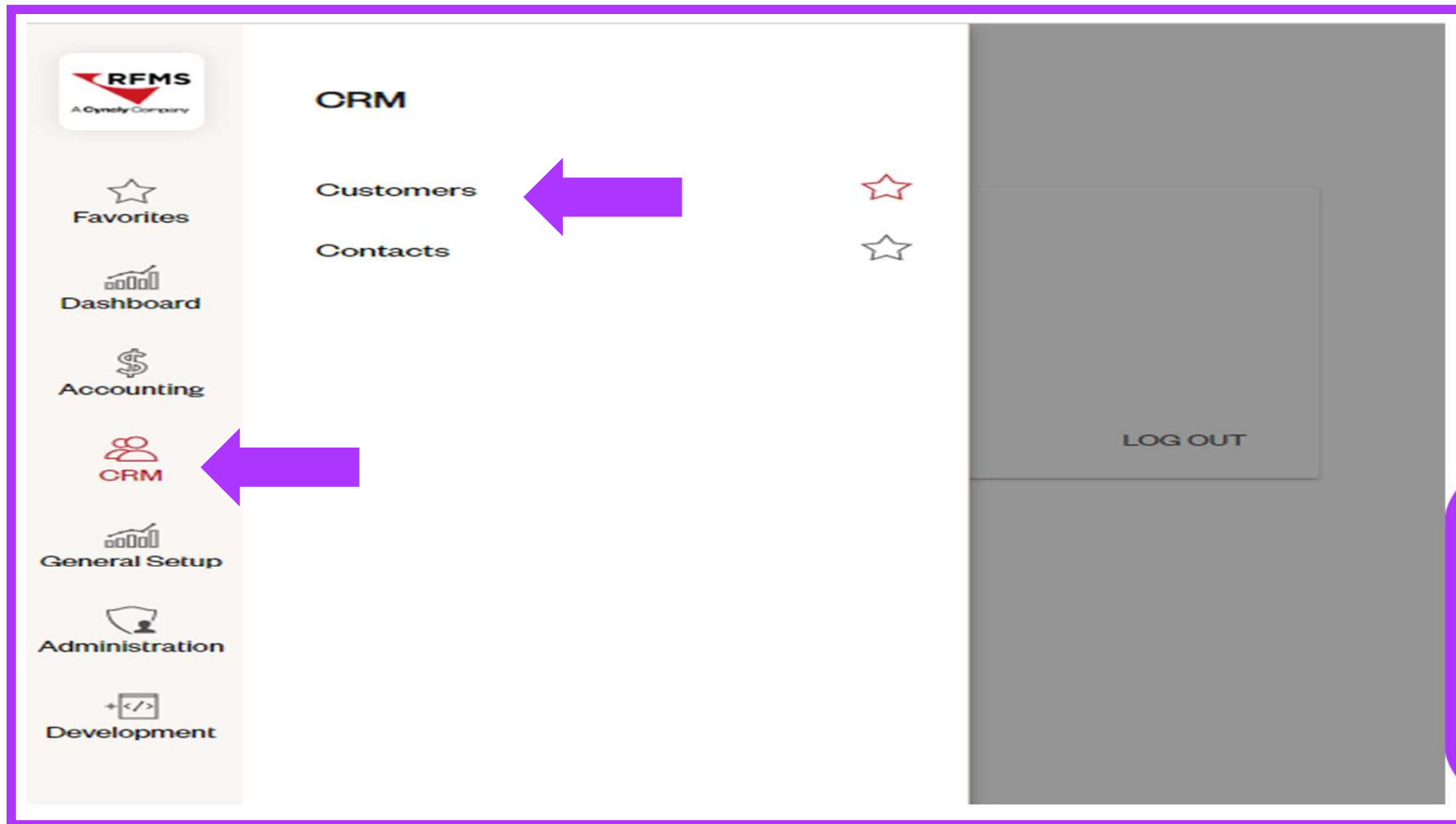
Accounts Payable

Accounting Reports – Top 10 Material Vendors



CRM

Manage Customer File



CRM

Manage Customer File

Customers

CRM > Customers

+ Add View Delete Download Print Communications Center Preview Refresh

Search
vaughan



Record Type



☐	Last Name	First Name	Business Name	City	St
--------------------------	-----------	------------	---------------	------	----

Manage Customer File

Copyright ©Cyncly Group

CRM

Manage Customer File

Custom

CRM > Custom

+ Add

View

Delete

Download

Print

Communications Center

Preview

Refresh

Search

vaughan

X

Record Type

X

	Last Name	First Name	Business Name	City	State	Zip	Ship Last Name	Ship First Name	Ship City	Sh
☒	VAUGHAN	STEVIE RAY		AUSTIN	TX	73344	VAUGHAN	STEVE	AUSTIN	TX

CRM

Manage Customer File

STEVE RAY VAUGHAN

CRM > Customers > STEVE RAY VAUGHAN

Edit

Delete

Back

Record Information

Communications Center

Standard

Ship To

Tax Certifications

Discount Levels

Credit Card Tokens

Sold To

Salutation

Select...

First Name

STEVE RAY

Last Name

VAUGHAN

Name

VAUGHAN, STEVE RAY

Business Name

Use Business Name

Address 1

1 BLUES LN

Address 2

City

AUSTIN

State

TX

Zip

73344

Country

Ship To

Ship Salutation

Select...

Ship First Name

STEVE

Ship Last Name

VAUGHAN

Name

VAUGHAN, STEVE

Ship Business Name

Use Ship Business Name

Ship Address 1

1 BLUES LN

Ship Address 2

City

AUSTIN

Ship State

TX

Ship Zip

73344

Ship Country

General Information

Customer Number

2430

Active

✓

Default Store

[*] RFMS CLOUD

Customer Type

RETAIL

Relationship

Standalone

Salesperson 1

TONY CARGILL

Commission Split

100.00%

Salesperson 2

Select...

Commission Split

0.00%

Pricing, Credit, PO and Invoicing

Require PO

Credit Limit

\$ 0.00

Terms

Term Days

0

Active Since Date

MM/DD/YYYY

Contact Information

Phone 1

Phone 2

330-555-1111

Phone 3

Phone 4

Phone 5

Email

SRVBESTGUITARIST@AOL.COM

Account Information

Renewal Amount

\$ 0.00

Renewal Date

MM/DD/YYYY

Tax Type

Tax

Tax Id

Tax Expire Date

MM/DD/YYYY

DOB

MM/DD/YYYY

SSN FEIN

Drivers License

DL State

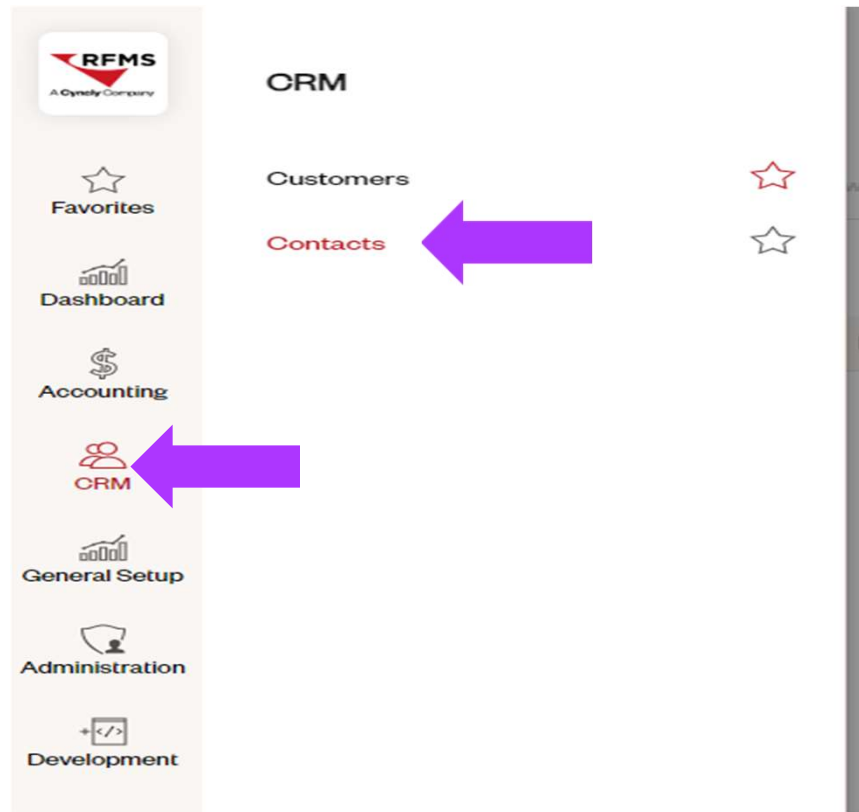
Tony Cargill

Copyright ©Cyncl Group

34

CRM

Manage Contacts



CRM

Manage Customer File

Contacts

CRM > Contacts

+ Add View Delete Show Related Customer Copy Download Print Communications Center Preview Refresh

Search

Minimum Two Char...

☐	Record Type	Record Description	First Name	Last Name	Job Title	Company Name
--------------------------	-------------	--------------------	------------	-----------	-----------	--------------



COMING SOON

RFMS Next Release Roadmap



Next Roadmap | Q4 2023-Q1 2024*

November 29	December 18	January 24	February 28	March 27
Version 1.2 • User Experience ◦ Custom Search Filters ◦ Improved Tabbing through Editable Fields • Accounting / Accounts Payable ◦ Manual Costing of Inventory ◦ Pay Bills via EFT ◦ Mark Invoices as Paid Online via Batch • Accounting / Banking ◦ Perform Bank Transfers	Version 1.2.1 • Accounting / Accounts Payable ◦ Automated Costing of EC Records	Version 1.3 • Accounting / Accounts Receivable ◦ AR Detail Report ◦ AR Totals Report ◦ AR Aging Report • General Ledger Functions and Reports • Accounting / Banking ◦ Receipt Recap Report • Owner Dashboard Reports ◦ Business Insights Reporting		Version 1.3 • Accounting / Accounts Receivable ◦ AR Credit Management ◦ Preview/Edit Statements ◦ Print Statements ◦ Manage Finance Charges • Accounting / Month End Reports Phase 1 • Inventory ◦ View/Edit Inventory ◦ Browse/Search Inventory • Products ◦ View/Edit Products ◦ Browse/Search Products ◦ Create New Products

Client Success Manager Territory Map

