

# How To: Sample Process

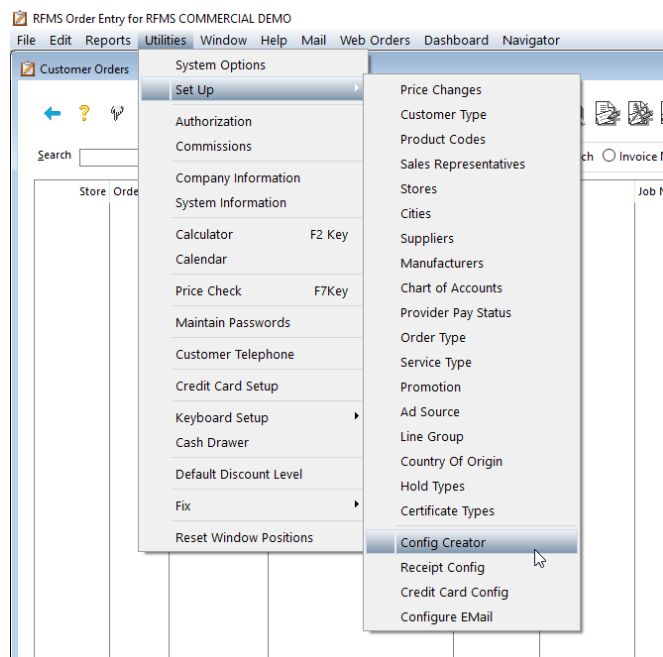
## RFMS Sample Process

If you wish to manage your samples in RFMS, you will want to set up a Sample Docket in Config Creator, and may wish to set up a Price Level for samples. This document covers:

1. Setting up the Sample Docket in Config Creator
2. Establishing a Sample Price Level
3. Issuing Samples
4. Returning Samples
5. Sample Management Report
6. Filtering for outstanding samples
7. Recommended best practice

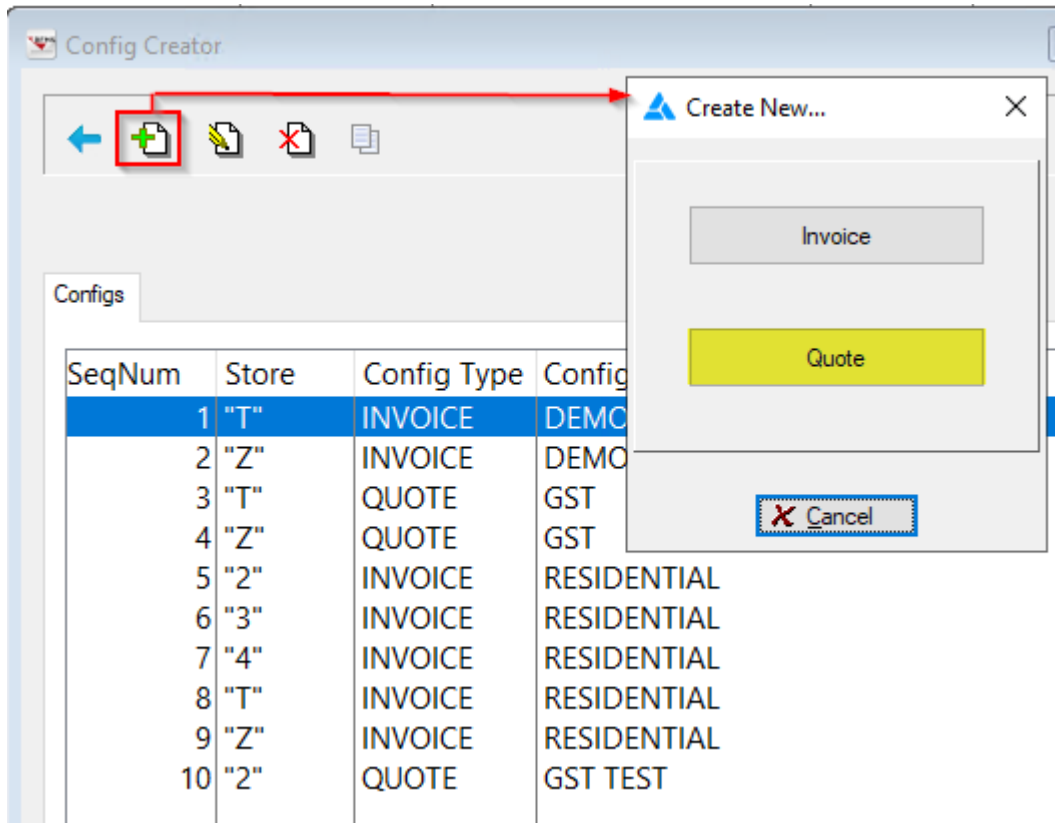
### 1. Set Up Sample Docket

In Order Entry go to Utilities > Set Up > Config Creator

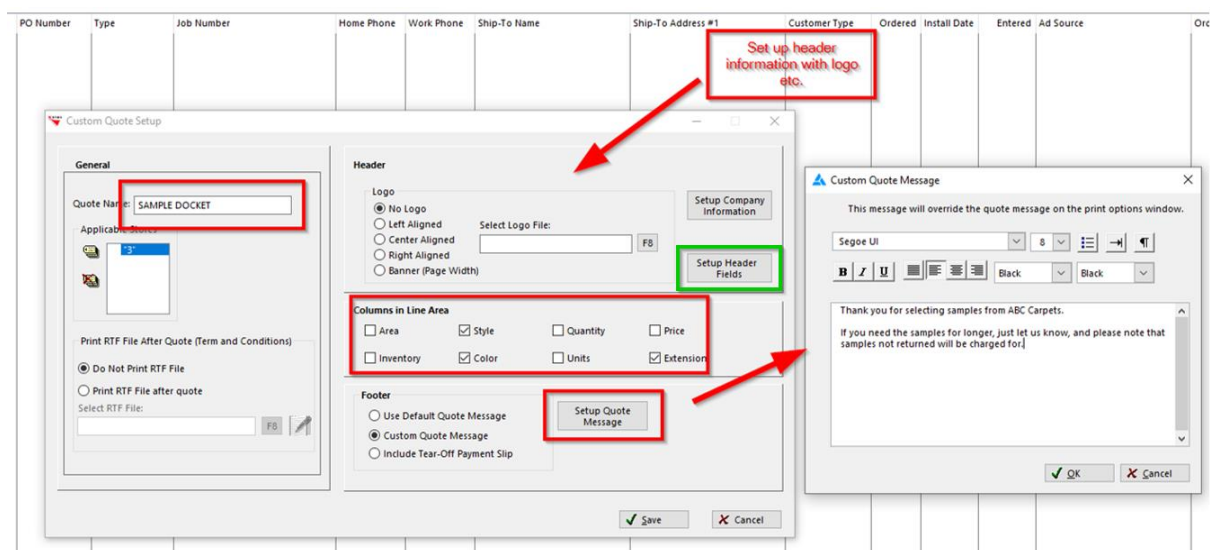


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Click on and you will be returned with a Create New box. Click on Quote to create a new document:

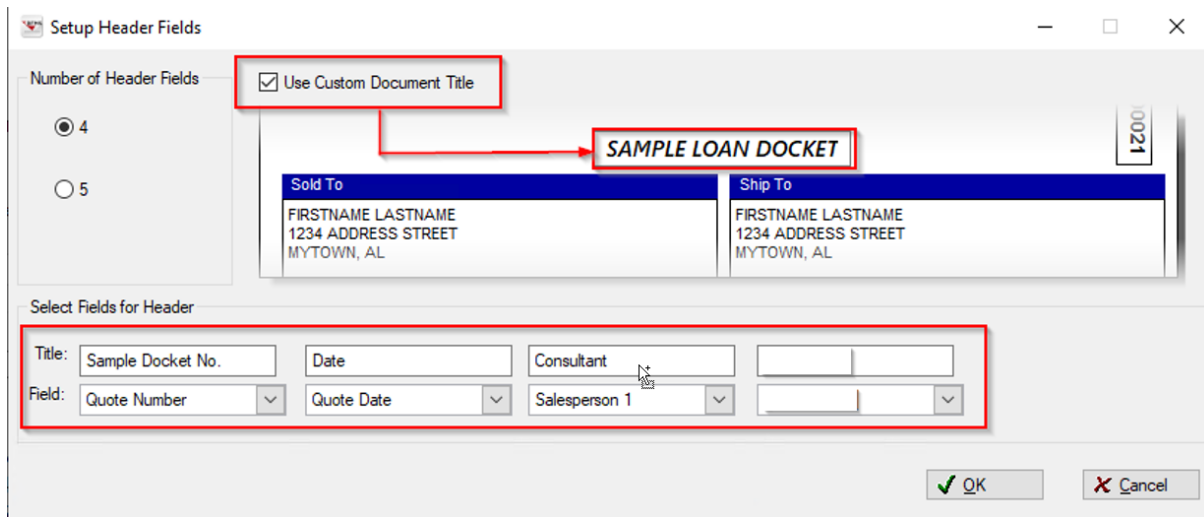


Complete the screen as below:

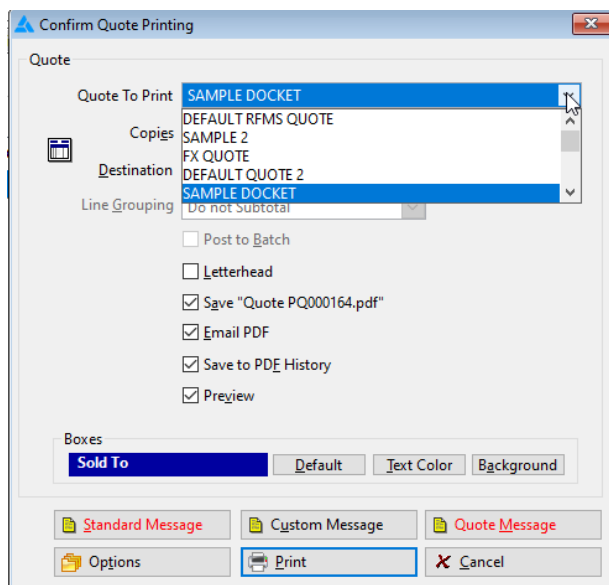


Click on Setup Header Fields (highlighted in green above).

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When printing a sample docket, you will select the appropriate form from the drop-down box when printing:



## 2. Set Up Sample Price Level

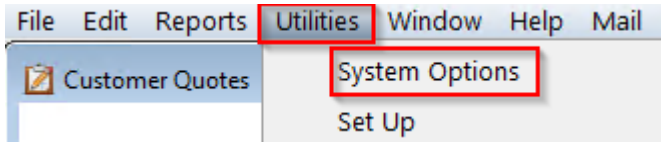
Having a price on the sample docket that will be charged if the sample is not returned will encourage customers to return samples. In this example, the sample charge will be \$50.00.

To do this you will need to (a) Rename a price level in System Options and then, (b) populate the price level with a price in the Products module.

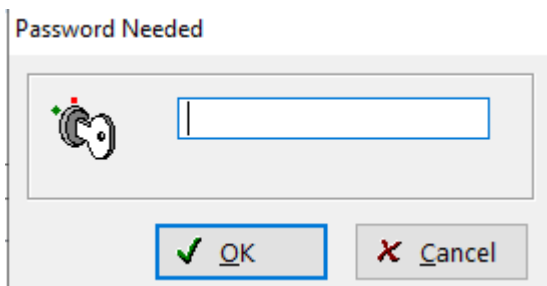
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## 2(a) Renaming a price level in System Options.

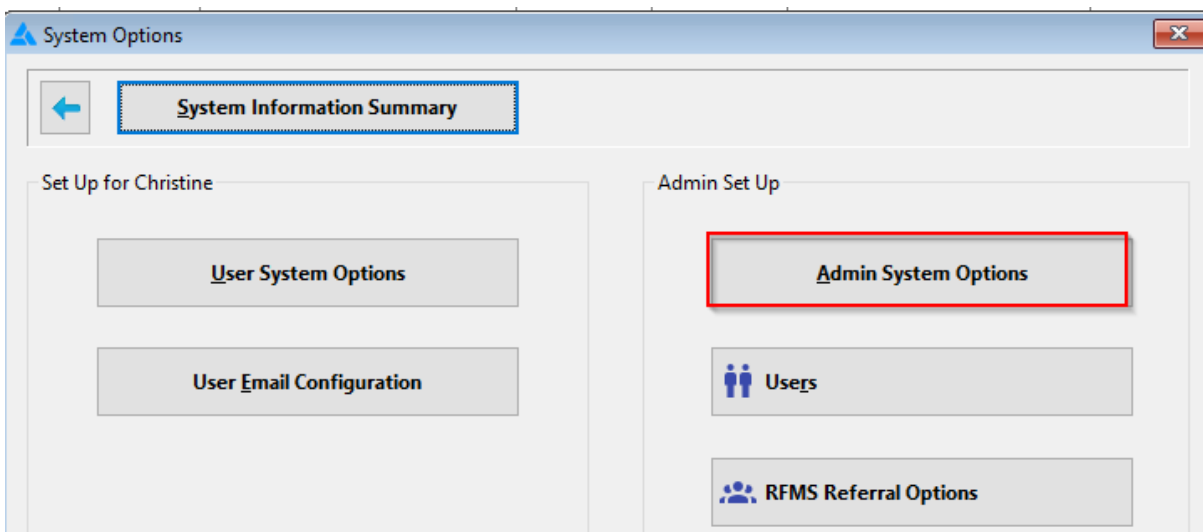
Go to Order Entry > Utilities > System Options;



Likely you will need a password to make this change. Enter the password and click OK



Click on Admin System Options – again likely you will need a password



Type in **Price Level Prompts** in the Search Option Field for Text as shown below. Press the TAB button on your keyboard to progress

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Browse System Options - Admin

Change Value | Change Hidden Setting | Change Type | Copy System Options

Filters

- Select Types: Global, Assigned, User
- Select Modules: Accounting, Bid Pro, Client Management, Contract Pricing, E-Commerce, Human Resources, Inventory, Multiple Invoice Payment, Order Entry, Products, Resource APB
- Select Applies To: Accounting, Alerts, B2B Distribution, BidPro, Billing Groups, Buying Groups, Capacity Settings, Claims, Commissions, Contract Pricing, Custom Resources
- Select Category: All
- Search Option Field for Text: Price Level Prompts
- Select User: [Empty]

Hidden	Type	Module	Applies To	Category	Option	Value	Note
	Assigned	Order Entry	Alerts	Interface	Create Schedule Pro Alerts for Edited Orders	User Specific Values	
	Assigned	Order Entry	Alerts	Interface	Display Schedule Pro Alerts on Order Entry Browse	User Specific Values	
	Assigned	Order Entry	Alerts	Interface	Create Schedule Pro Alert for Added Line	User Specific Values	Depends on the "

You will be returned with a Price Level Prompt system option as shown below

Hidden	Type	Module	Applies To	Category	Option	Value	Note
	Assigned	Order Entry	Order Entry	Prompts	Display Line Price Level prompts based on Order Store or Product	User Specific Values	
✓	Global	System Wide	Products	Prompts	Price Level Prompts	Multiple Options	

Double click on the Price Level Prompts system option to open and be returned with

Browse User Values for Specific System Option - Admin Only

Change Value for Tagged Users | Clear Value for Tagged Users

Option: Price Level Prompts

Type: Global | Module: System Wide | Category: Prompts | Applies To: Products

Note: [Empty]

Search Users: [Empty]

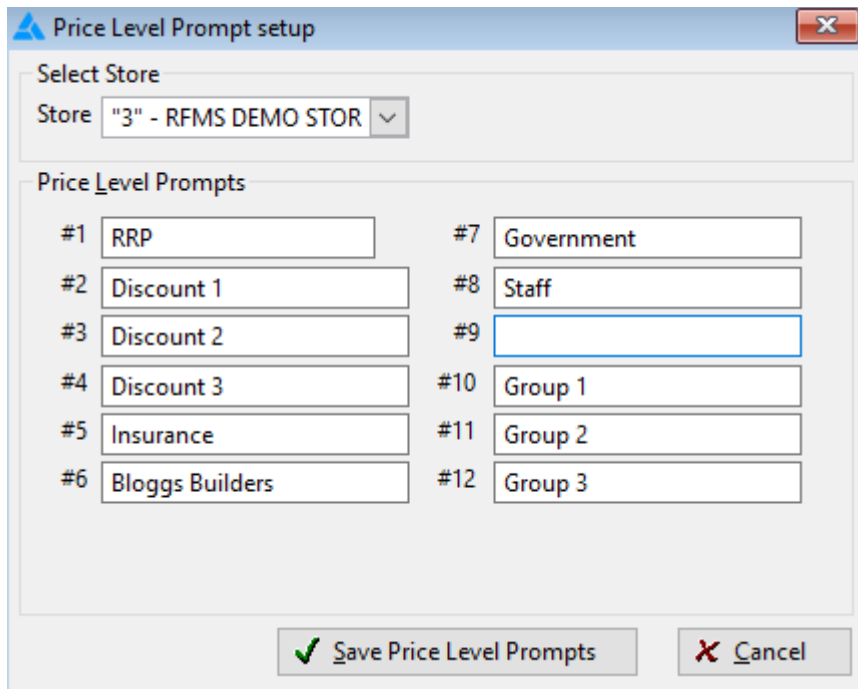
Select Users:

- adam-ccnz
- Administrator
- al.hargrove
- Andrew.George
- anthony.carter
- arodgers
- barry.galbreath
- brendanm
- caedan.lavender
- Catherine
- christine

User Name	Value
GLOBAL	Multiple Options

Double-click on the highlighted blue line to open up the Price Level Prompt Set-Up

# How To: Sample Process



Price Level Prompt setup

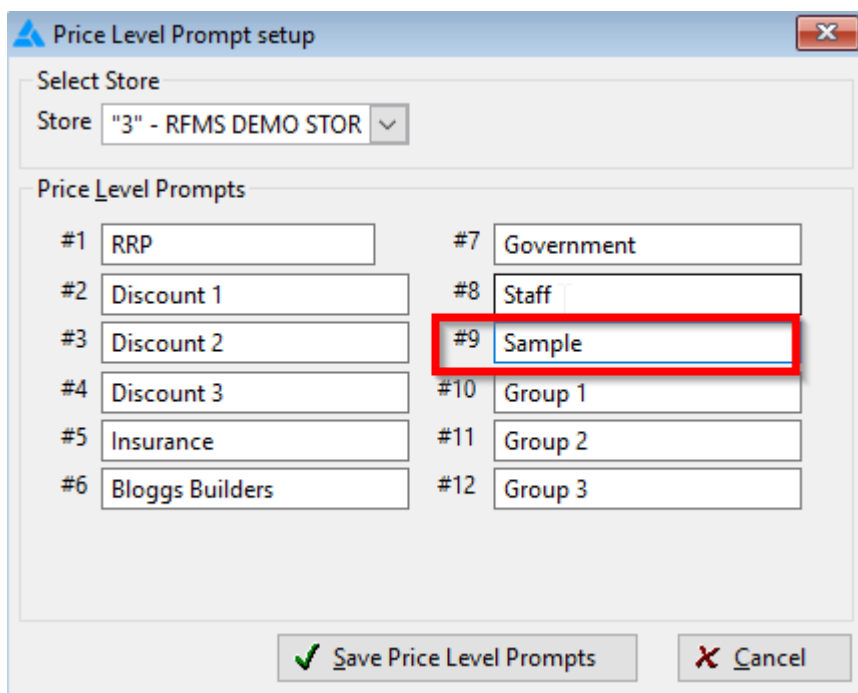
Select Store  
Store "3" - RFMS DEMO STOR

Price Level Prompts

#1 RRP	#7 Government
#2 Discount 1	#8 Staff
#3 Discount 2	#9
#4 Discount 3	#10 Group 1
#5 Insurance	#11 Group 2
#6 Bloggs Builders	#12 Group 3

Save Price Level Prompts Cancel

Rename one of the price levels to Sample and click on the Save Price Level Prompts button



Price Level Prompt setup

Select Store  
Store "3" - RFMS DEMO STOR

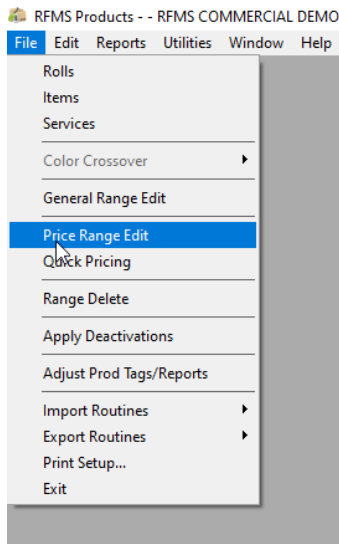
Price Level Prompts

#1 RRP	#7 Government
#2 Discount 1	#8 Staff
#3 Discount 2	#9 Sample
#4 Discount 3	#10 Group 1
#5 Insurance	#11 Group 2
#6 Bloggs Builders	#12 Group 3

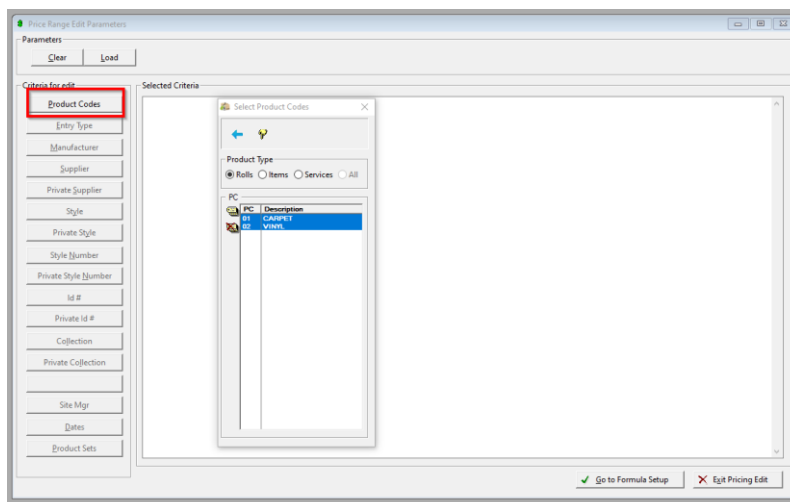
Save Price Level Prompts Cancel

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## 2(b) To create the sample price to go Products > File > Price Range Edit

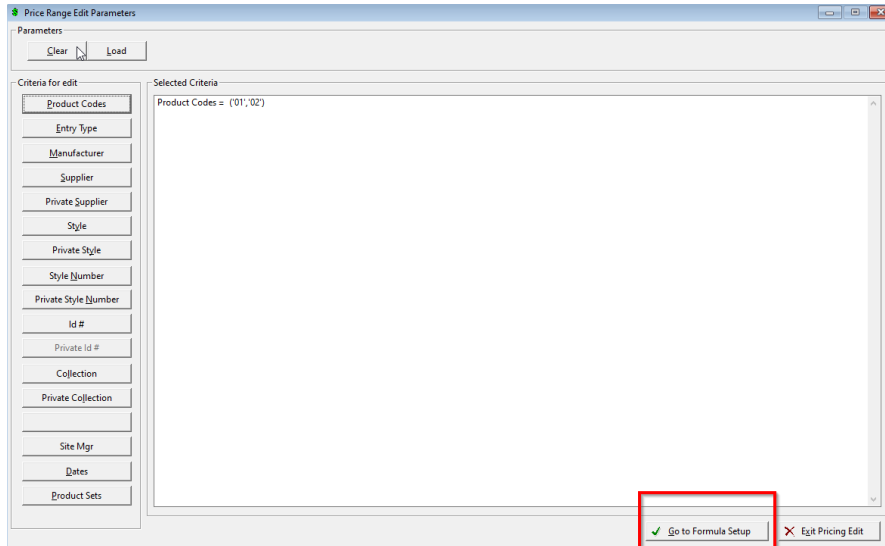


Click on Product Codes and highlight both Carpet and Vinyl, then click on the selection finger:

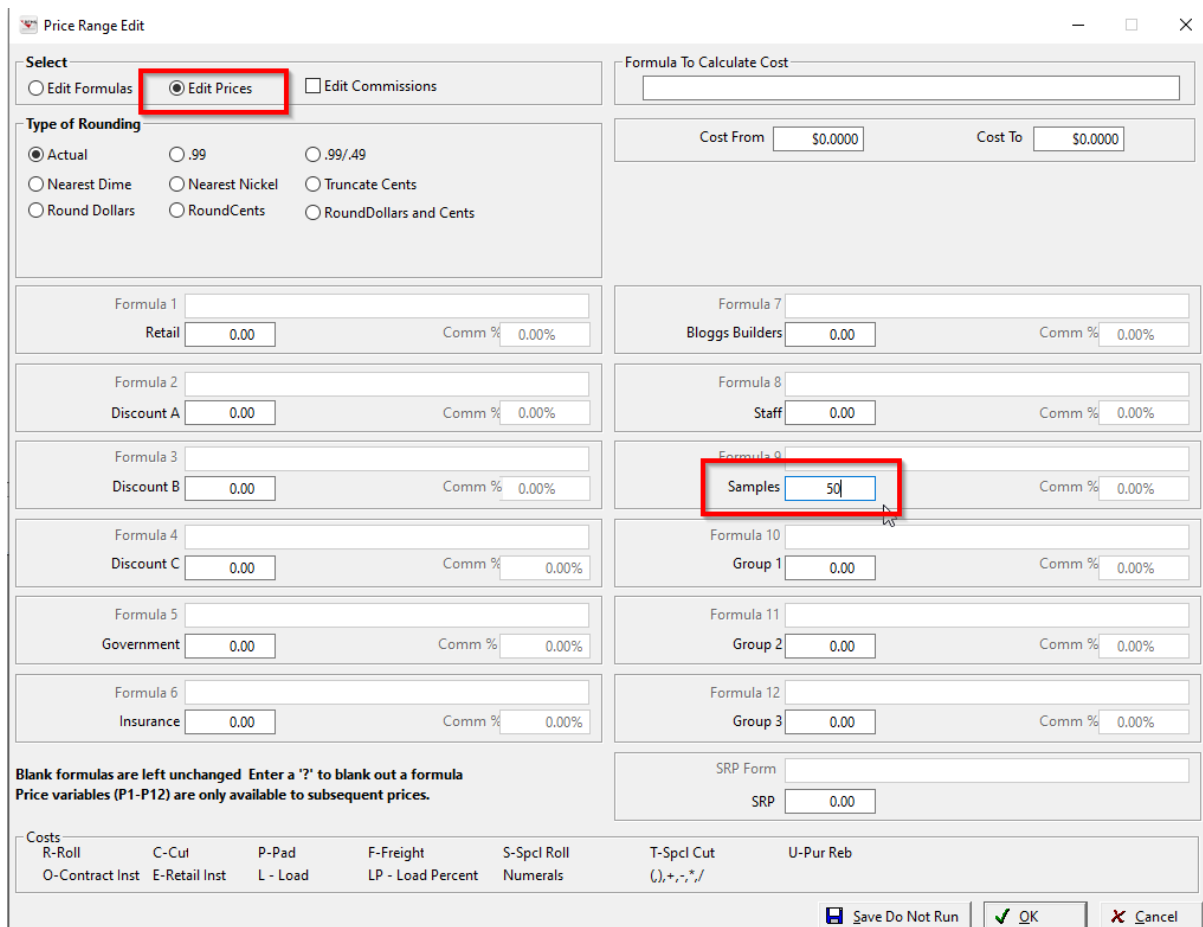


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Click on Go to Formula Setup:



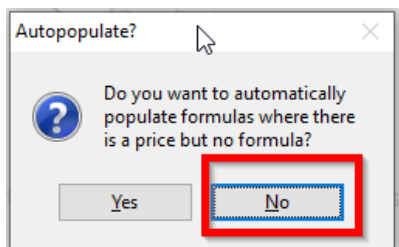
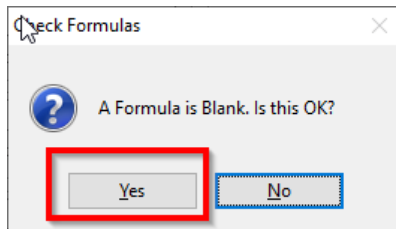
Select the price level line that you renamed to Sample (It won't be named Sample here), and enter in the price you wish to show for samples:



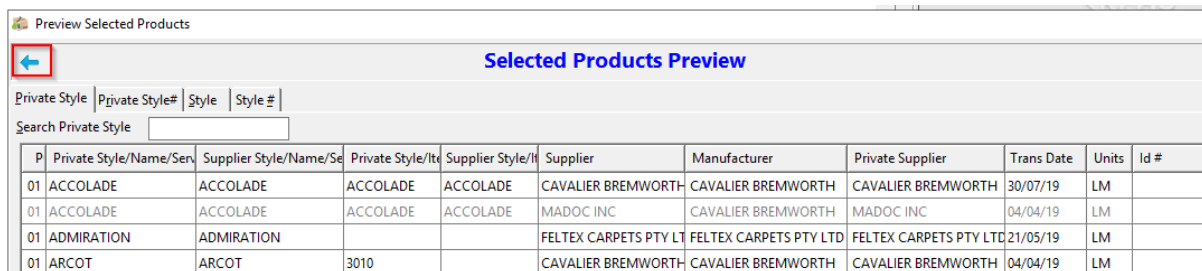
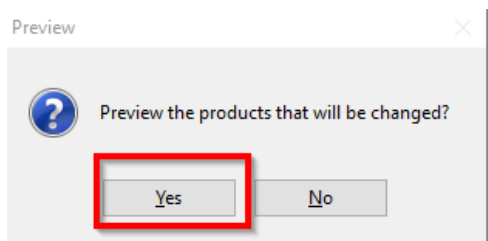


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Click on okay and click on Yes for the next two windows:




You can preview all the products that have been changed; click Yes:

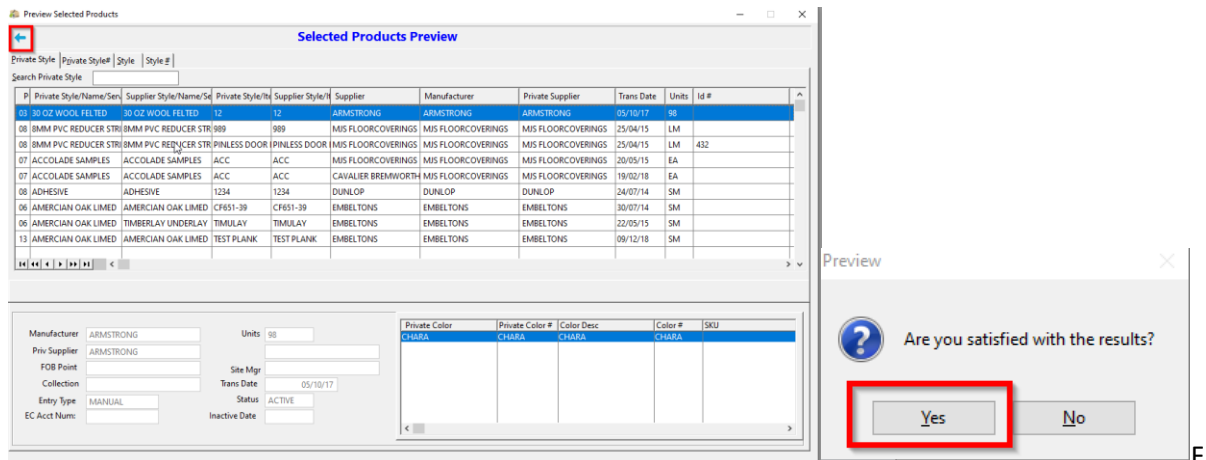


A window titled "Preview Selected Products" showing a table of product data. A blue arrow points to the back arrow icon in the top left corner of the window.

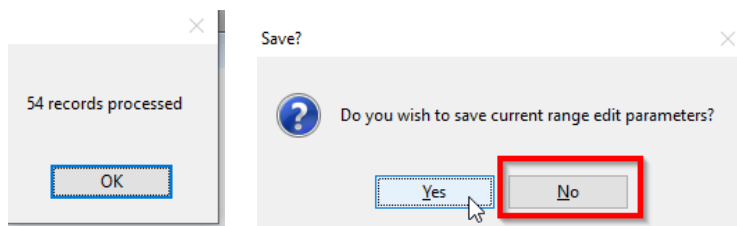
P	Private Style/Name/Se	Supplier Style/Name/Se	Private Style/It	Supplier Style/It	Supplier	Manufacturer	Private Supplier	Trans Date	Units	Id #
01	ACCOLADE	ACCOLADE	ACCOLADE	ACCOLADE	CAVALIER BREMWORTH	CAVALIER BREMWORTH	CAVALIER BREMWORTH	30/07/19	LM	
01	ACCOLADE	ACCOLADE	ACCOLADE	ACCOLADE	MADOC INC	CAVALIER BREMWORTH	MADOC INC	04/04/19	LM	
01	ADMIRATION	ADMIRATION			FELTEX CARPETS PTY LTD	FELTEX CARPETS PTY LTD	FELTEX CARPETS PTY LTD	21/05/19	LM	
01	ARCOT	ARCOT	3010		CAVALIER BREMWORTH	CAVALIER BREMWORTH	CAVALIER BREMWORTH	04/04/19	LM	

Click the exit arrow  and Yes when you are happy that you have changed the correct records:

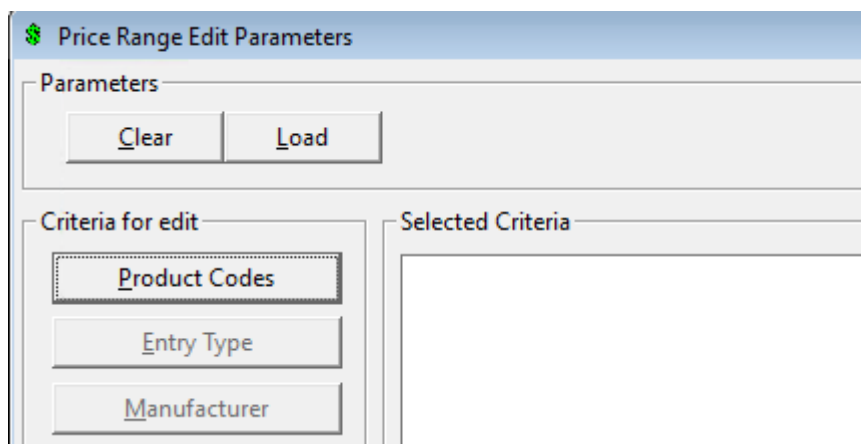
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Next window tells you how many products were processed and finally, because we are not using a complex formula, there is no need to save it.



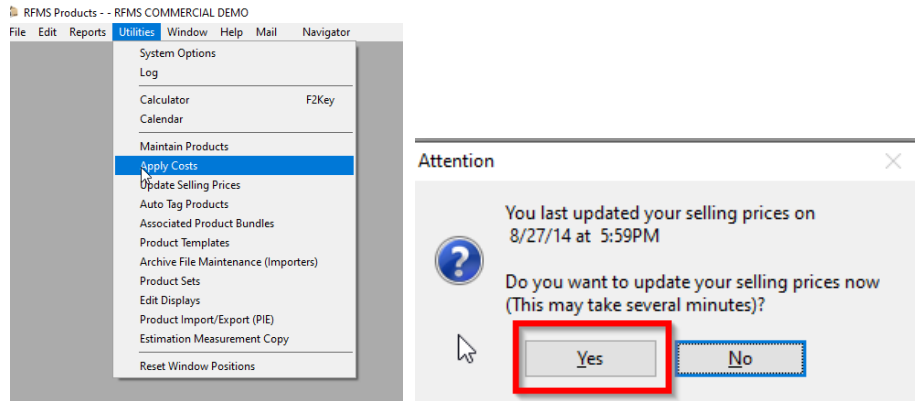
You should now be back at the Price Range Edit Parameters screen



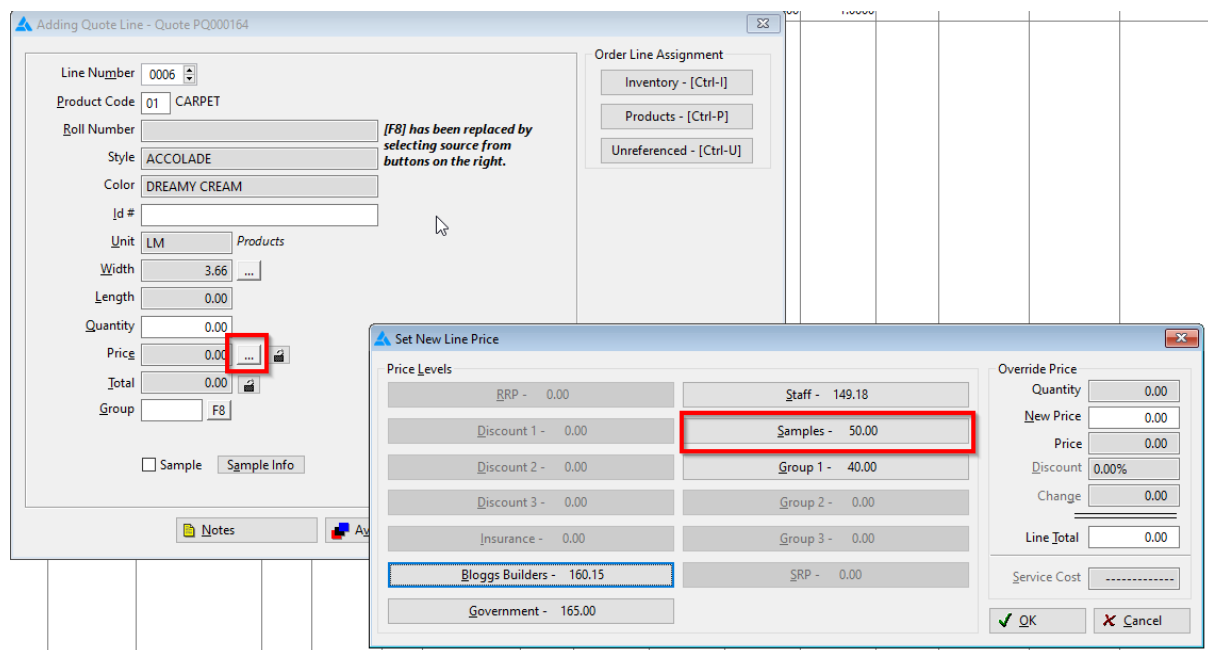
Follow the same process for items.

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To complete go Product/Utilities/Apply Costs, click on Yes:




If all has gone according to plan, when you click on the ellipsis icon when adding a product, you will now see your Sample price level is available for selection.



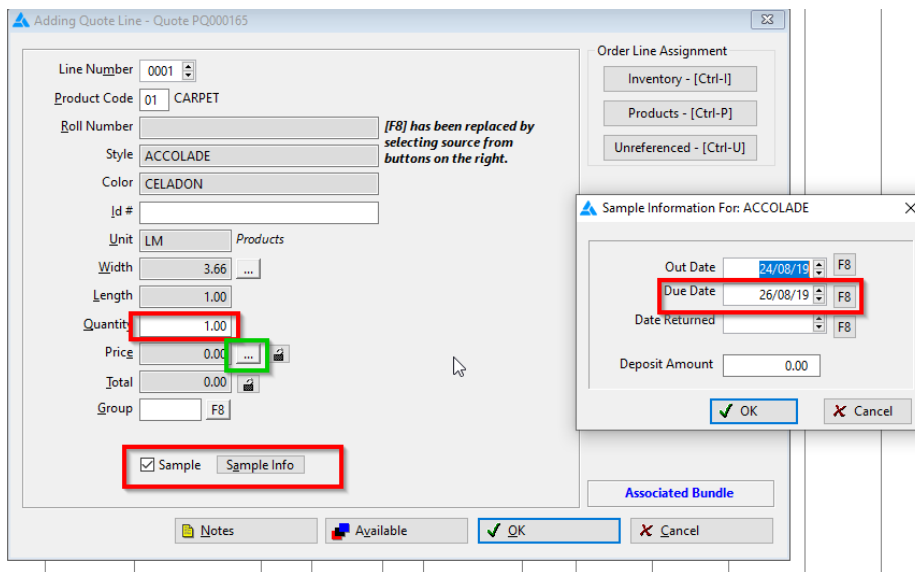
# How To: Sample Process

## 3. Issuing Samples

Go to Order Entry > Quotes and click on  to create a new quote.

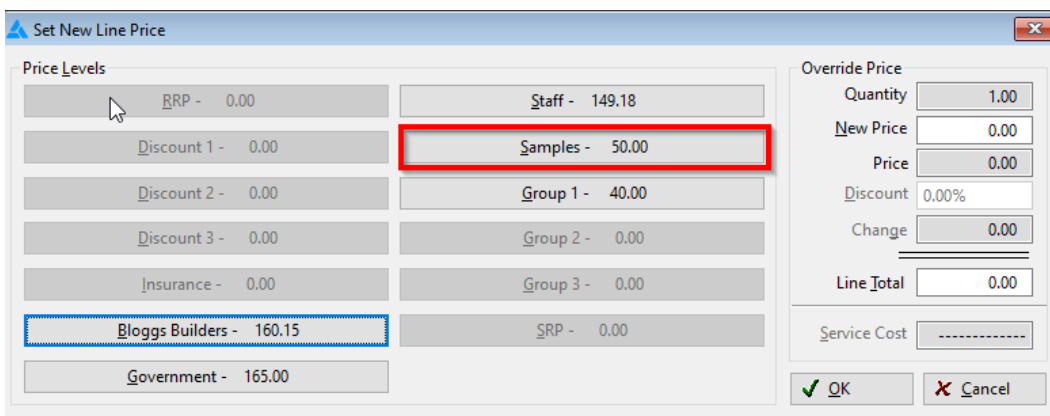
Add customer details either from an existing customer or create a new one.

For each sample the customer wishes to take, create a product line; enter the quantity (likely 1), and check the Sample checkbox. In the Sample Info window that opens, you can accept the default period for the sample loan, or change the return date as required.



The screenshot shows the 'Adding Quote Line - Quote PQ000165' window. The 'Line Number' is 0001, 'Product Code' is 01 CARPET, and 'Style' is ACCOLADE. The 'Quantity' is 1.00, and the 'Sample' checkbox is checked. A 'Sample Info' sub-window is open, showing 'Out Date' as 24/08/19 and 'Due Date' as 26/08/19. The 'Price' field in the main window has an ellipsis button highlighted in green.

When you click on the ellipsis button (in green above), your price levels will display including the the Sample Price Level:

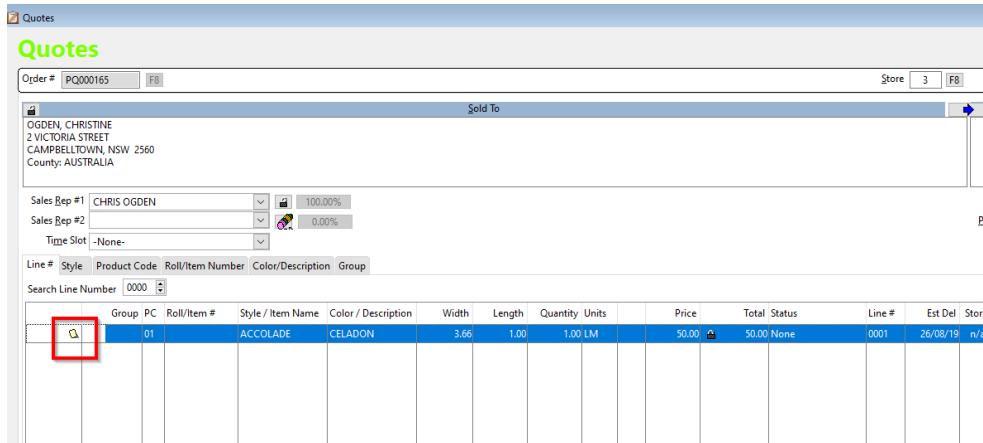


The screenshot shows the 'Set New Line Price' window. The 'Price Levels' table lists various price levels, with 'Samples - 50.00' highlighted in red. The 'Override Price' section shows 'Quantity' as 1.00, 'New Price' as 0.00, and 'Line Total' as 0.00.

Price Levels	
RRP - 0.00	Staff - 149.18
Discount 1 - 0.00	<b>Samples - 50.00</b>
Discount 2 - 0.00	Group 1 - 40.00
Discount 3 - 0.00	Group 2 - 0.00
Insurance - 0.00	Group 3 - 0.00
Bloggs Builders - 160.15	SRP - 0.00
Government - 165.00	

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The product is now added to the quote as a sample, indicated by the icon on the left of the line:



Quotes

Order # PQ000165 | Store 3 | FB

Sold To  
OGDEN, CHRISTINE  
2 VICTORIA STREET  
CAMPBELLTOWN, NSW 2560  
County: AUSTRALIA

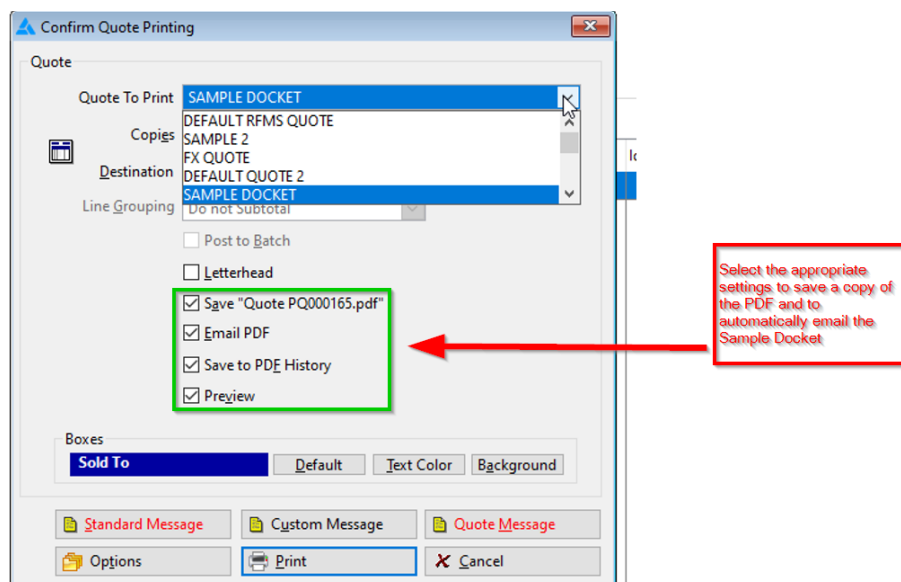
Sales Rep #1 CHRIS OGDEN | 100.00%  
Sales Rep #2 | 0.00%  
Time Slot -None-

Line #	Style	Product Code	Roll/Item Number	Color/Description	Group
0000					
		01		ACCOLADE CELADON	

Search Line Number 0000

Group	PC	Roll/Item #	Style / Item Name	Color / Description	Width	Length	Quantity	Units	Price	Total	Status	Line #	Est Del	Ston
		01		ACCOLADE CELADON	3.66	1.00	1.00	LM	50.00	50.00	None	0001	26/08/19	n/a

Print the quote, selecting your Sample Docket as the desired format:



Confirm Quote Printing

Quote

Quote To Print: SAMPLE DOCKET  
Copies: SAMPLE 2  
Destination: SAMPLE DOCKET  
Line Grouping: Do not subtotal

Post to Batch  
 Letterhead  
 Save "Quote PQ000165.pdf"  
 Email PDF  
 Save to PDF History  
 Preview


Boxes: Sold To | Default | Text Color | Background

Standard Message | Custom Message | Quote Message  
Options | Print | Cancel

Select the appropriate settings to save a copy of the PDF and to automatically email the Sample Docket

# How To: Sample Process

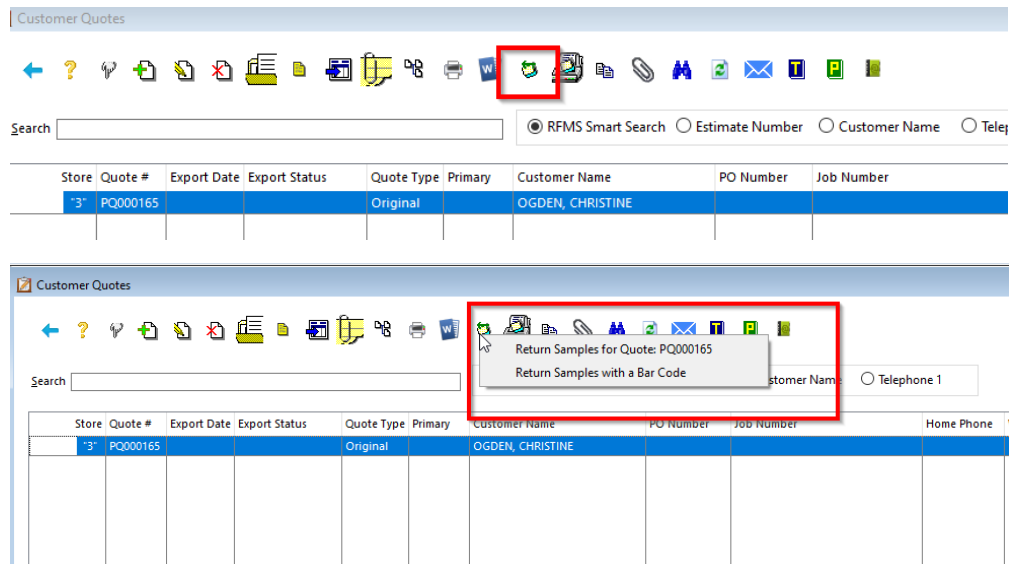
Your Sample Docket will appear something like this:

 <p>Systems for Success</p>		<b>RFMS DEMO STORE</b> 127 GORDON ROAD AUCKLAND, 2013 Telephone:	
Page 1	<b>SAMPLE DOCKET</b>	<b>PQ000165</b>	
<b>Sold To</b> CHRISTINE OGDEN 2 VICTORIA STREET CAMPBELLTOWN, NSW 2560		<b>Ship To</b>	
<b>Quote Number</b>	<b>Quote Date</b>	<b>Telephone 1</b>	<b>Return Date</b>
PQ000165	24/08/19		/ /
<b>Style/Item</b>	<b>Color/Description</b>	<b>Extension</b>	
ACCOLADE	CELADON	50.00	
<b>Terms and Conditions</b>			
- 24/08/19 - Sales Representative(s): CHRIS OGDEN		3:05PM - Order: PQ000165	
<b>Sample Docket</b> Thank you for selecting samples from Carpet Court. If you need further samples we will be happy to help and if you need these samples a little longer just let us know. Please note that samples that are not returned will be charged for.		Material: 50.00 Service: 0.00 Misc. Charges: 0.00 GST: 4.55 <b>QUOTE TOTAL: \$50.00</b>	

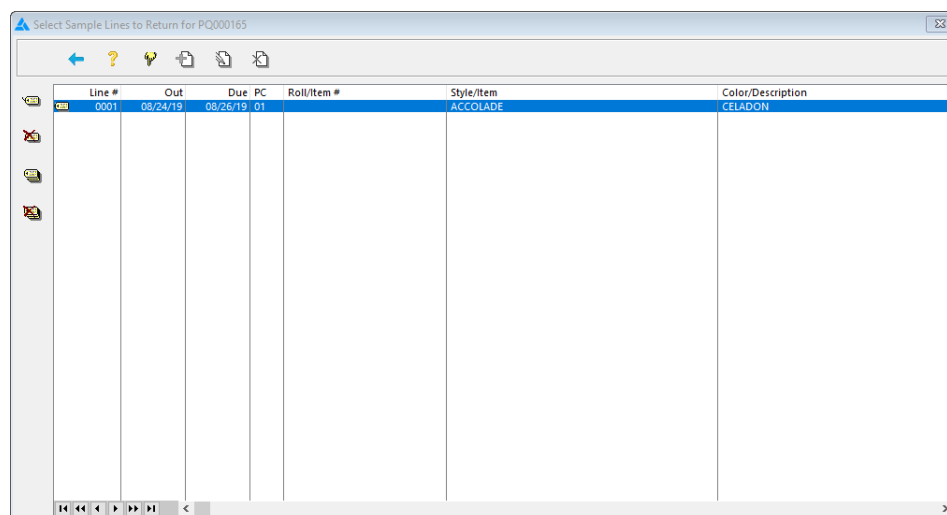
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## 4. Returning Samples

When samples are returned, highlight the quote, click on the Return Sample icon, and select from the menu that appears:



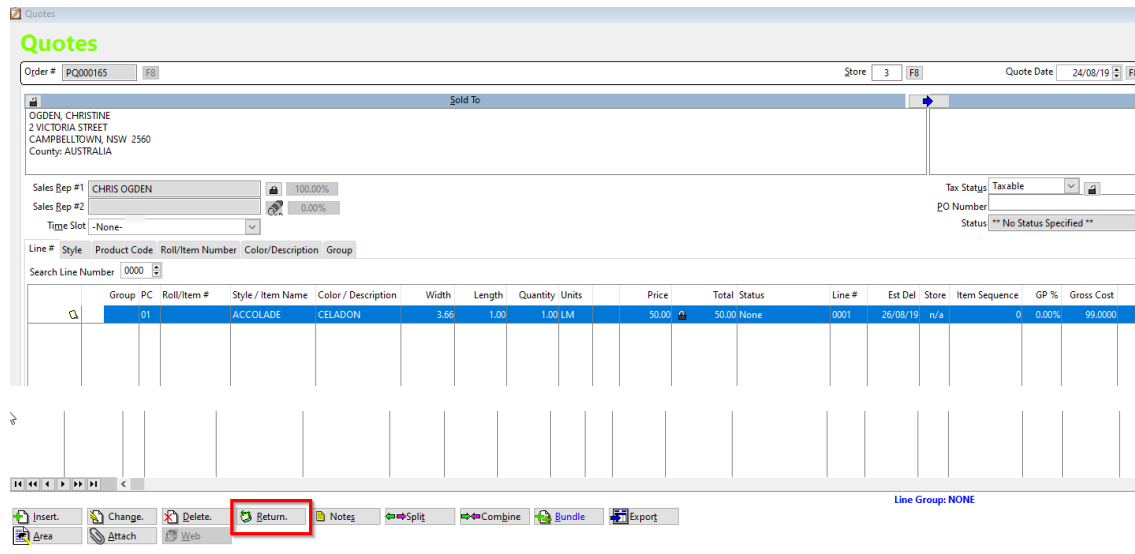
In the next window tag the returned samples and then click on the selection finger icon.



The samples are returned, the sample icon is removed from the line in the quote, and the date of return now shows in the Sample Management Report.

Alternatively, open the quote, select the product line for the returned sample, and click on the return button.

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Quotes

Order # PQ000165 Store 3 Quote Date 24/08/19

Sold To

OGDEN, CHRISTINE  
2 VICTORIA STREET  
CAMPBELLTOWN, NSW 2560  
County: AUSTRALIA

Sales Rep #1 CHRIS OGDEN 100.00%  
Sales Rep #2 0.00%  
Time Slot -None-  
Tax Status Taxable  
PO Number  
Status \*\* No Status Specified \*\*

Line #	Style	Product Code	Roll/Item Number	Color/Description	Group	Width	Length	Quantity	Units	Price	Total	Status	Line #	Est Del	Store	Item Sequence	GP %	Gross Cost
01				ACCOLADE CELADON		3.66	1.00	1.00	LM	50.00	50.00	None	0001	26/08/19	n/a	0	0.00%	99.0000

Line Group: NONE

Return

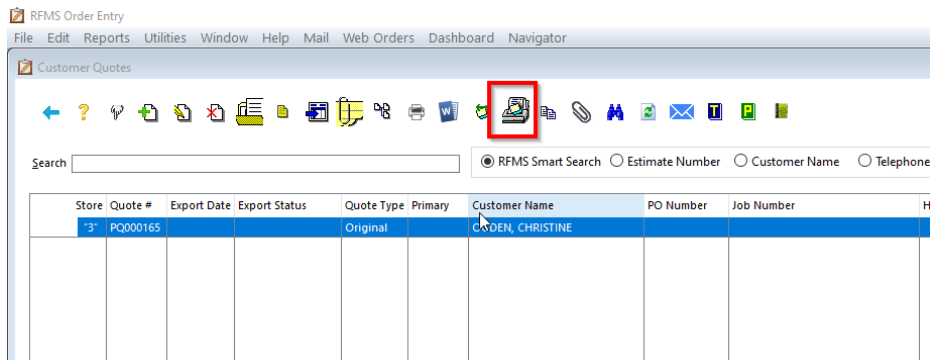
As for the first Return option, the sample icon is removed, and the date of return is shown in the Sample Management Report.



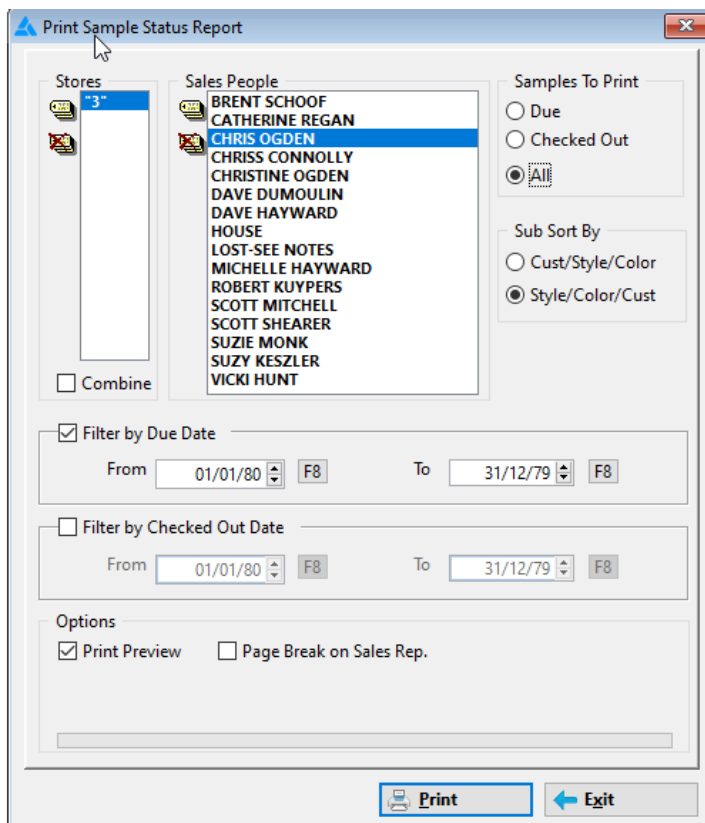
# How To: Sample Process

## 5. Sample Management Report

To access the report, click on the icon on the toolbar:



Select the desired settings for your report:



# How To: Sample Process

## Sample Management Report:

Page No: 1  
24/08/19  
03:57PM

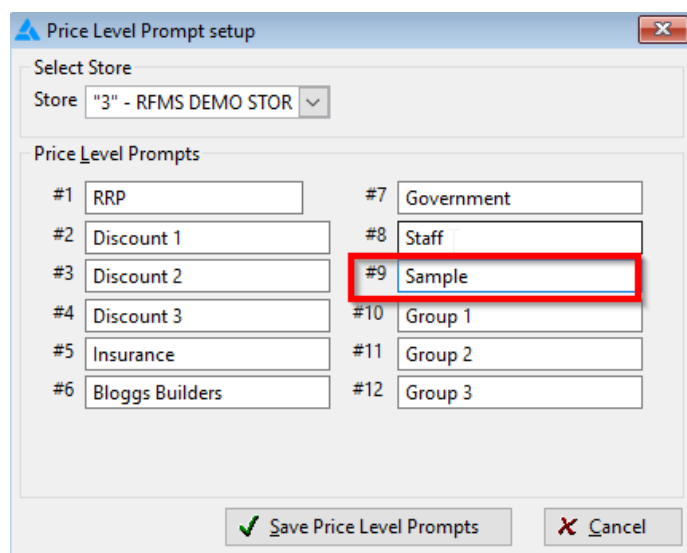
RFMS COMMERCIAL DEMO  
SAMPLE STATUS REPORT  
All Samples  
Sub Sort By: Style/Color/Customer  
\*\*\* denotes that sample is due

Store: "3"

Quote #	Customer	Style	Color	Out	Due	Returned
Sales Rep: CHRIS OGDEN						
PQ000165 OGDEN, CHRISTINE						
Phone:						
Email: christine@rfms.com						
* PQ000159	MONK, SUZIE	ACCOLADE	DREAMY CREAM	18/07/19	20/07/19	
Phone: 03 8754 2365						
Email: smonk@rfms.com						
PQ000164 MCKAY, TIM						
Phone:						
Email: tim@mckay.com						
PQ000164 MCKAY, TIM						
Phone:						
Email: tim@mckay.com						
PQ000164 MCKAY, TIM						
Phone:						
Email: tim@mckay.com						

Asterisk indicates samples are overdue

To find out who has a particular sample, filter the report as follows; checked out samples for all salespeople according to Style/Colour/Customer:



Price Level Prompt setup

Select Store  
Store: "3" - RFMS DEMO STOR

Price Level Prompts


#1 RRP	#7 Government
#2 Discount 1	#8 Staff
#3 Discount 2	#9 Sample
#4 Discount 3	#10 Group 1
#5 Insurance	#11 Group 2
#6 Bloggs Builders	#12 Group 3

Save Price Level Prompts Cancel

The resulting report will show product range in alphabetical order, making it easy to see who has the sample you are looking for.

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## 6. Use Filters to Access Sample Data

In Quotes, the Black Binocular Filters is a quick way to identify customers who are yet to return samples;; click on  in the Quotes toolbar.

Check the Quotes With Samples Outstanding checkbox (1), select the salesperson (2), and a date range (3):

The resulting screen shows only those customers with samples on loan:

RFMS Order Entry

File Edit Reports Utilities Window Help Mail Web Orders Dashboard Navigator

Customer Quotes

Search  RFMS Smart Search Estimate Number Customer Name Telephone 1

Store	Quote #	Export Date	Export Status	Quote Type	Primary	Customer Name	PO Number	Job Number	Home Phone	Work Phone	Ship-To Name
"3"	PQ000132			Original		DEAN, JAMES			03 98978 097		
"3"	PQ000138	13/05/19	Original Exported	Original		FRANCIS, MICHAEL			0423 100 477		
"3"	PQ000159		Related Exported	Primary	PQ000159	MONK, SUZIE			03 8754 2365	03 9862 3514	MONK, SUZIE
"3"	PQ000165			Original		OGDEN, CHRISTINE					

# How To: Sample Process

## Sample Management Best Practice

Managing samples is one of the single most overlooked opportunities in almost all flooring businesses. The goal of sample management is not simply to ensure samples are returned but to follow up on the interest.

Recommended best practice:

- Issue samples in a branded bag (reusable/recyclable), making it easier for the customer to identify those samples from our store
- Identify those samples that are loaned more frequently, and have more of these on hand
- All samples should be issued via the RFMS management system (we are not just tracking samples, we are creating sales leads)
- When issuing samples, get all the customer's contact information; address, phone numbers and email address. The more information we have, the easier it is to follow up, and the less information we have to gather when we move to the quoting stage
- Follow up on all samples loaned within 24 hours. It is much easier to make the follow-up call if we lay the foundation that we will call – "I'd love to know which ones work best at home so may I call you...." Be ready to look for samples to fill any gaps in colour so you can have them ready for pick-up or delivery to their home.
- Set expectations for staff when samples are returned. They should be asking questions to ensure we stay on the customer's list of retailers they might want to deal with:
  - Which sample did the customer like?
  - Can we help them find other samples?
  - Have they seen anything elsewhere they like?
  - Can we arrange a measure?
- For conversion rates, include samples issued, i.e. don't exclude samples from the Quote Information Report
  - Initially, this will have an impact on conversion rates, but it will be one time, and everyone will be on the same level playing field
  - If we start thinking about samples the same way we do quotes, our sales will increase
  - Do we have an expectation as to how many customers who take samples eventually go on to have a measure and a quote?
- Sample Management Report:
  - Salespeople should review this report daily:
    - Overdue Samples – to follow up on
    - Sample loan outs that have not yet resulted in Measures and quotes
    - As a prompt for follow up calls
  - Managers or sales managers should be running this as a report or a filter from time to time:
    - Discuss sales opportunities with salespeople
    - See how many samples are being issued by each salesperson; too few and the salesperson is possibly not engaging well with customers, or they are not following the process for issuing samples

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The opportunity is to make more sales by giving those customers who take samples the same care and attention we give those for whom we have measured and quoted. We all want more store traffic, but are we making the most of the traffic we are getting?

The flooring business that gets a handle on sample management will have a significant competitive advantage over its competitors because it's unlikely they are acting on the opportunity.