



## **RMS FAQs**

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### **How can I check that an emailed invoice has been sent properly or received?**

It is possible view electronically sent invoices and resend if required. This is achieved by selecting the *Invoice Email Receipts* menu option in the *Invoicing* main menu, which brings up the Invoice Receipts List.

The list is populated with all electronic emails that have been sent over the last week for all accounts, although an individual account can be specified, as well as a custom date range. To re-queue an un-received invoice, tick the relevant checkbox associated with the invoice and press the re-queue selected Invoices button. The date time received is set when the recipient, by way of an acknowledgment link.

### **How do I mark invoices as paid in RMS?**

It's possible to mark an invoice as paid. There is some initial setup that is required to mark invoices as paid (This only has to be undertaken once for each sales account). This is achieved by selecting the *Sales Accounts* menu option in the *Setup* main menu, which brings up a list of the sales accounts on the system. Double-click a sales account to show the *Sales Account Maintenance* screen. Navigate to the *R & R* tab and within the *Invoicing* section tick the *Requires Remittance* and press the *Save* button.

To mark an invoice as paid is achieved by selecting the *Invoice Remittance* menu option in the *Invoicing* main menu, which brings the *Remittance Details* screen. Use the supplied search options to generate a list of relevant invoices. Double-click a row to show the *Remittance Entry* popup. Here you can mark an invoice as paid by ticking the *Fully Paid?* Checkbox and pressing the *Save* button.

### **How do I change the name or address on an invoice once it has been created?**

To change the name or address on an invoice, select the *Transaction List* from the *Invoicing* main menu to show the transaction list. Use the *Search & Filter* options to generate a list of relevant invoices. Double-click the desired grid line to show the *Transaction Maintenance* screen, from here you can specify a new *Name* or *Address* and update the invoice details by pressing the *Save* button.

### **What night control options does RMS have?**

You have the following night control options in RMS:

- Auto Accept - This night control option automatically accepts the job and responds to the originator notifying them to call a pre-arranged number.
- Pda Divert - This night control option automatically accepts the job then allocates the job to the specified driver and vehicle and issues the job to the drivers PDA.
- Subcontract - This night control option automatically accepts the job then subcontracts it to the specified supplier.
- Auto Divert - This night control option forwards all RAM messages to the specified ANS node. The night controller then carries out the job on your behalf with all updates coming back into your system and also to the job originator.
- Pda Divert and Request Confirmation Call - This night control option automatically accepts the job then allocates the job to the specified driver and vehicle and issues the job to the drivers PDA.
- Pda Divert for Acceptance - This night control option is only available when using Android® PDAs (it is not compatible with the Windows Mobile ones). When a this option is selected any jobs that come in via the ANS network will be automatically diverted to the selected driver's PDA. The driver will then be able to either accept the job (with an ETA) or reject the job (with a refusal code). It is also possible for the driver to select another driver to send the job to. The acceptance / refusal will be sent back to the job originator as normal. No other updates are automatically sent back to the job originator.

### **How do I send a job to a subcontractor?**

To send a job to a subcontractor, click the *Subcontract* (hand) icon next to the *Vehicle* field in the *Main Service* section of the job screen. This brings up the *Subcontractor Selection* popup. Select a subcontractor from the *Subcontractor* selector and press the *Subcontract* button to send the job to the subcontractor.

### **How do I add information to my invoice (i.e. like payment information)?**

You can add additional information to an invoice in RMS easily. Simply go to the job screen and in the *Other Details* section is an *Invoice Notes* field. Here you can type free text that will appear on your invoice.

### **How do I credit an invoice?**

To raise a credit note in RMS. Select the *Transaction List* from the *Invoicing* main menu to show the transaction list. Use the *Search & Filter* options to generate a list of relevant invoices.

Double-click the desired grid line to show the invoice details. To raise the credit note, press the *Raise Credit Note* button to show the Raise a Credit Note popup – here you have two options:

- Full Credit - shows the *New Credit Note* screen and gives you the option to generate a full credit note.
- Part Credit - shows the *New Credit Note* screen and gives you the options to generate a part credit note.

### **Is it possible to delete an invoice?**

Yes, this is possible from the job screen go into 'charges' then 'view invoices', click the delete button at the end of the row for the required invoice.

### **How can I set up the SMS feature in RMS?**

Please contact Apex Networks about this feature.

### **Can I export sales accounts from RMS into Sage to prevent me retyping everything?**

It is possible to export sales accounts so that they can be imported into Sage. Select the *Sales Accounts* menu option from the *Setup* main menu to show the list of sales accounts on the system. Pressing the *Sales Account Sage Export* button at the bottom of the screen generates a CSV file named *AccountExport.csv*, which can be saved to the HD and used to import sales accounts into Sage.

### **Invoices for cash jobs are not showing the owner's name and address, why is this?**

Make sure the Sales Account is set as a "Cash account": go to the Sales account maintenance screen, open the sales account details and verify that the checkbox "Cash Account" is ticked.

### **Why are no services displayed on the recovery job's dropdown list?**

Make sure the required services are added to the rate card for the job account. Open the rate required rate card (either via the sales account maintenance screen 'R&R' tab then press 'View' next to the rate card drop down which will open the rate card for that account, or via setup -> rate cards). Choose the 'vehicle classes / services' tab and make sure the correct services have been added.

### **On the printed invoices, the address and telephone numbers of the depots are showing blank or incorrectly?**

Please check the setup system in particular the sites and control rooms to make sure the addresses are correct there. If they are then call Apex support.

### **Why are no fault codes available in the list on the recovery job screen?**

Select *Agencies* from the *Setup* menu to show a list of agencies. Double-click an agency to show the *Agency Details* popup. On the *Main Details* tab make sure that you have *Sales Accounts* linked to the selected agency. Additionally.....

## Apex RMS Frequently Asked Questions

- Make sure that your *Fault Codes* are setup correctly on the *Fault Codes* tab.
- Make sure that your *Outcome Codes* are setup correctly on the *Outcome Codes* tab.
- Ensure that the sales account for the job belongs to an agency with fault codes.

### Why cannot I find a Sales Account in the Sales Account list on the job screen?

Select the *Sales Account* menu item from the *Setup* menu. This will open show a list of all Sales Account on the system. Make sure that the *Status* of the account is set to *Current* (Misc section) and make sure that the *R&R Account* tickbox is ticked

### My on scene times are not going back to the club?

To allow sending on scene times back to the club – Select the *Sales Account* menu item from the *Setup* menu. This will show a list of all Sales Account on the system. Double-click the required row to show the *Sales Account Maintenance* screen. Select the '*R & R*' tab – In the *Job Notifications* section tick the 'At Scene Message' tickbox.

### How do I setup Sales Account mobidem overrides?

When setting up a mobidem for a sales account, you can use the filter section at the bottom of the screen to tell RMS that ram jobs with a specific order number pattern must be allocated to a specific sales account, other than the default sales account indicated at the top of the screen.

If the order number starts with HAS, please enter ^HAS in the filter box as shown in the picture below. (NB: character ^ is above the letter 6 on the keyboard). Select the alternate sales Account, then click the green cross. Finally click the Save button.

The screenshot shows the 'Mobidems' application interface. At the top, there is a search bar labeled 'Search Mobidems:'. Below it is a table with columns: 'Mobidem #', 'Description', 'Site', 'Sales Account', and 'Subcontractor'. The table lists several entries, each with a 'Set up Account' and 'Set up Contractor' link. A dialog box titled 'Mobidem Sales Account Details' is overlaid on the table. It contains the following information:

- Messages from mobidem: 3021134 will go to sales account: STA03
- Filters section with a table:

Destination Mobidem	Job Order # Filter	Sales Account
All Mobidems	^HAS	STA05

At the bottom right of the dialog box, there is a green plus sign icon and a 'Save' button.

### How can I get a list of all sales accounts and their details?

Select *Sales Accounts* menu item from the *Setup* menu, which will show a list of the Sales Accounts on the system – to get a complete list of sales accounts in Excel format, press the *Sales Account List Report* button on the bottom left of the screen

### **How do I setup Green Flag's invoice files?**

Select *Sales Account* from the *Setup* menu, which gives you a list of sales accounts. Double click a *Sales Account* to show the *Sales Account Maintenance* popup. On the *R & R* tab set the *Method* to *Electronic*, then enter their email address ([central.invoicing@greenflag.com](mailto:central.invoicing@greenflag.com)) in the *Invoice Email* field. An automatic process runs every night to email the Green Flag invoices (only the new invoices that have not yet been sent). You can check whether an invoice email has been received by Green Flag by selecting *Electronic Invoice Files* from the *Invoicing* menu.

### **Why can't I un-invoice this job?**

RMS allows uninvoicing a job in the following conditions:

- The user has permission to edit job after invoicing.
- the invoice has not already been exported to Sage.
- the invoice is either a normal invoice or a statutory invoice.

### **Why is the "Alter Callout" button not visible on the Job Charges screen?**

Check that the following permission is set for the user's role:

- Manually alter job prices

If the job has already been invoiced but job information not yet exported to accounts, the callout can be edited if the following permission is enabled:

- Edit Job after invoicing

### **How do I get the owners name and address printed on an invoice?**

If a job is for a 'cash' account then the invoice will show the owners details rather than the account details, accounts are specified as cash accounts by ticking the relevant checkbox in the account setup screen. If an invoice contains parking and recovery charges then the billing details section of the parking job is used on the invoice, make sure this section contains the owners details.

### **How do I use the system to obtain quotes for work?**

There is no quotation system currently in RMS. Most companies will leave a job at the top of the screen on hold for this purpose, changing the sales account and other parameters as required then getting the values from the charges screen.

### **How do I create an invoice with a different date?**

There is a date selection field on the login screen of RMS, defaulted to the current date. All invoices created by that user will take the date selected. To select a different date, untick the 'use current date' and select the required date. To reset the date simply log out then back in again.

### **When I start up my PDA it says 'this device is inactive or unregistered in RMS', how do I resolve this?**

Make a note of the device ID shown on the PDA screen. Go into RMS recovery section then choose 'Setup -> Recovery Parameters' then choose the 'PDA Setup' tab. From the drop down list choose 'Inactive PDAs' (or find the device by entering part of the device ID into the 'PDA Number' field). Edit the required row and set the PDA to active, press the 'retry connection' button on the PDA and it should now connect correctly.

### **No drivers are appearing on my PDA**

Firstly, check that every driver that will use a PDA has a PDA PIN number set up in their driver record which is accessed from the driver list in the setup system. Secondly, from the PDA login screen press the devices menu button and choose 'Reload Driver List'.

### **Why is the 'Ram Email' button greyed out in the recovery job screen?**

This button will only be available for jobs that originated from the ANS network, if a job was manually entered into the system this button will be disabled.

**When I send a job to the driver via Navman it is not received, is this an RMS issue or a Navman issue?**

This could be either a navman or an RMS issue. Firstly check the Navman Online AVL software to see if you can see the job message, if you cannot then contact Apex. If the message shows in the AVL software and hasn't got to the device please contact Navman.

**I am getting a 'payment type' option when creating an invoice, why?**

In the sales account setup screen under the 'R&R' tab there is a checkbox labelled 'Force Payment Type', it is this setting that does this.

**How do I override the rates (i.e. add a manual price) for a job?**

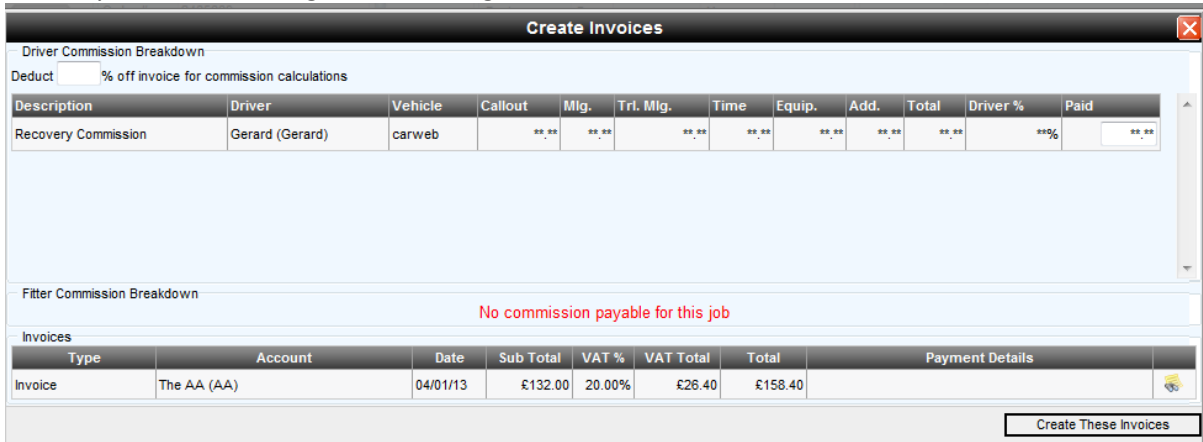
On the job charges screen there is a button to override the rates values:



Note that this button will not be available for statutory jobs.

**Why can't I edit the drivers commission values when invoicing?**

You may see the following when creating invoices:



This is because the user does not have the permission 'Drivers Ledger' set. To view the details set this permission.