



# Measure Mobile Handbook

MM V. 5.1.4

Notes:

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# Measure Mobile App Workflow Training

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1. Home Projects Screen – Filters/Icons
2. Project Settings
3. Project Information
4. Drawing – Quick Rooms, Transitions, Re-name room, Line Draw, Touch Draw
5. Drawing – Stairs, ABC, Measure Line
6. Drawing – Choose Product, Estimate and Notes Tab
7. Checklist
8. Worksheet
9. Proposal document
10. Installation document

[ FOR HELP: ]

Support Site:

[www.support.measureflooring.com](http://www.support.measureflooring.com)

Email:

[measuresupport@rfms.com](mailto:measuresupport@rfms.com)

# Step by Step of creation of Measure Mobile project to a quote in RFMS

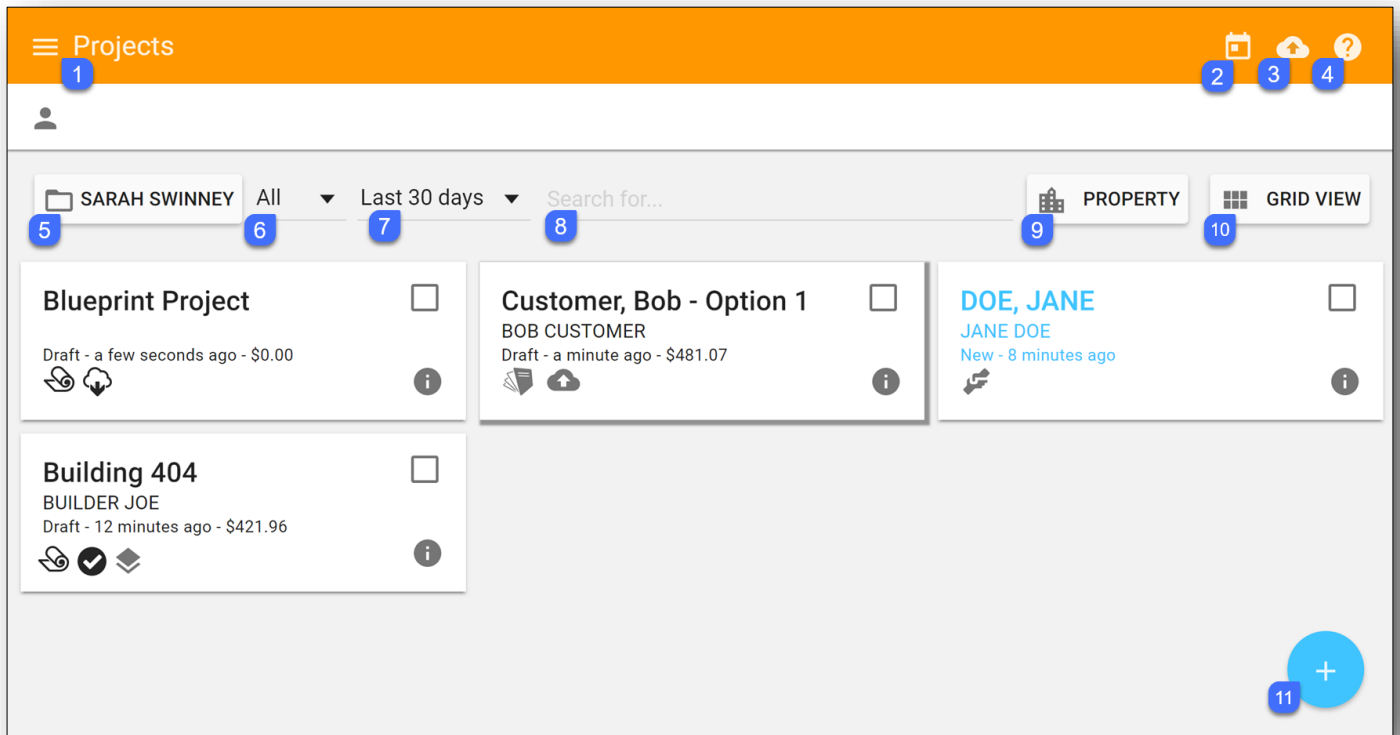
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1. Tap the cloud icon at the top right corner to sync device
2. Tap blue plus icon bottom right corner
3. Tap Create New Project (paper icon)
4. If an existing customer, Tap Search Store for Customer (blue font), type name and Begin search.  
Tap on customer desired  
OR  
Enter a new customer's information and check the New Customer checkbox  
(Use magnifying glass between City and State fields to search for correct county with zip code)
5. Tap Add Project
6. Tap Project Information icon (little i bottom left corner of the screen)
7. Enter Measure Date, Estimated Delivery Date and any internal/private notes on right side of screen
8. Tap Customer tab up at the top and enter any information missing ("Sold to" of quote)
9. Tap Job tab at the top and enter job address if different ("Ship to" of quote)
10. Tap Done
11. Draw your floor plan - Tap blue plus icon to start drawing and any time you have to add a room or door DON'T FORGET TO NAME THE ROOM, ADD YOUR DOORS, AND ENTER NOTES AND TAKE PICTURES
12. Choose your products by tapping on the room(s) you want to add it to and tap "Choose Product"
  - a. If product chosen is a roll good, lay direction can be adjusted and check your Estimate tab for waste
  - b. If product chosen is hard surface, verify that you have enough waste with arrow percentage icon on top right corner of the screen on the Estimate tab
13. After finished drawing, Go to Checklist screen (clipboard icon), select services needed one at a time and go through the Rooms, Products and Notes tab for each line selected
14. Go to Worksheet screen (calculator icon), to set your pricing for each line. Tap to select the line, and then tap the price where it says RETAIL. Tap the appropriate price level desired or tap "Write-in" to enter your own price.
15. Rearrange your lines in the order you want them on the quote
16. Tap square and arrow icon top right corner of the screen to send to RFMS, then tap "New Export to RFMS"
17. Tap Save once RFMS Mobile (red app) opens
18. Once it saves and quote number appears, tap Customize PDF and select/deselect what you want the customer to see
19. Tap Create PDF in the top right corner to preview the quote in PDF
20. Tap Send in the top right corner to email the quote to customer
21. ALWAYS go back to Measure Mobile and tap "Check Now"
22. Tap house icon top left corner to go back to home project screen

## MISCELLANEOUS

23. Go to Proposal screen (pen and paper icon), all boxes should be UNCHECKED
24. Go to Installation screen, (box and paper icon), all boxes should be CHECKED except 3D ones
25. Don't forget to go back to Home screen and sync your device

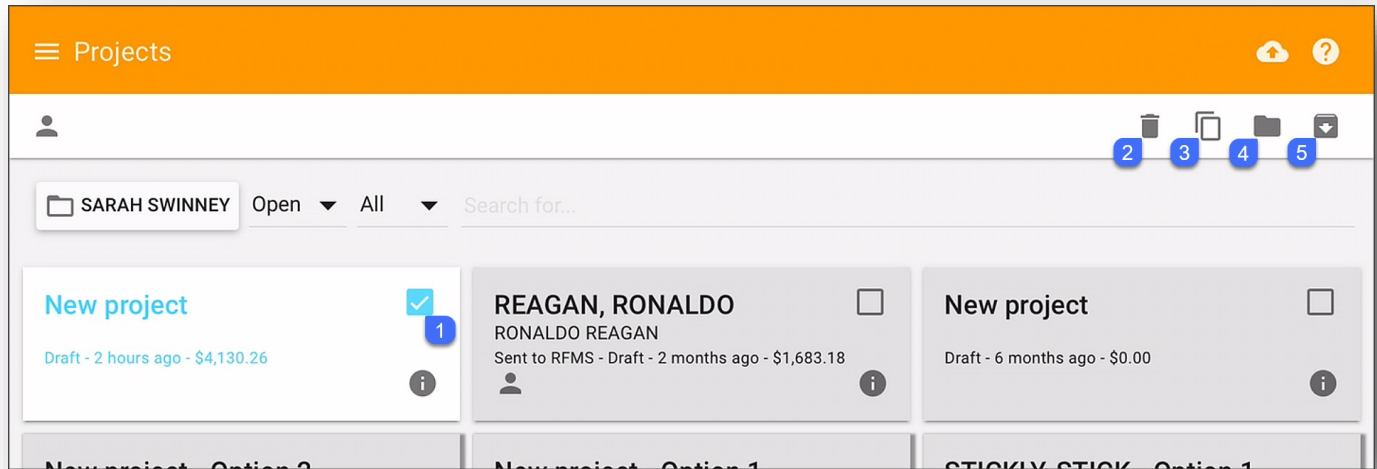
# Home Projects Screen



1. Menu
2. View calendar appointments (CRM users only)
3. Sync device to cloud
4. On screen tool tips
5. Access another user's folder
6. Switch current folder view to view projects in other status
7. Date range filter
8. Search by customer name, project title or quote/order number if created from Measure Mobile
9. Assign properties to projects (only for Property Manager users)
10. Change projects view
11. Create a new project

# Home Projects Screen

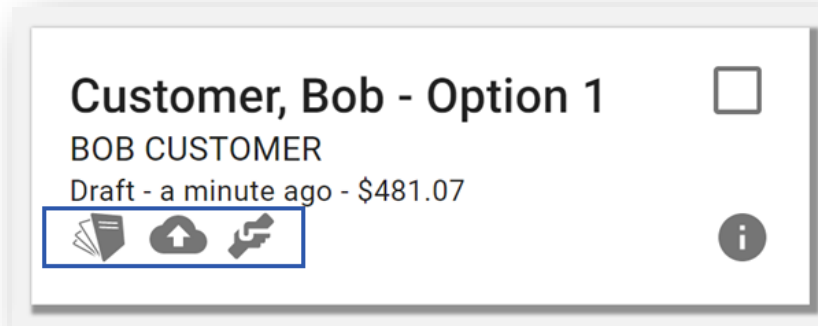
When a project is selected



1. Select a project
2. Delete the selected project
3. Duplicate the selected project
4. Move the selected project to another user's folder
5. Archive the selected project

# Home Projects Screen

## Project Card Notification Icons



## Notifications and Meanings



This icon appears when there are multiple sheets associated with a project. Select this icon to select which sheet to open and start working on. (Measure Desktop Users Only)



This icon pair indicates that there is a blueprint for this project that are available to download from the cloud. Tap on the icon to download the blueprint. (Measure Desktop Users Only)



This icon pair indicates that the blueprint for this project has already been downloaded and is on the device. (Measure Desktop Users Only)



This icon indicates that the measure project is associated with an opportunity in CRM.



The Project Set icon indicates that there are multiple project options in this project. Tap the icon to select which project option to open. *(Note: You can also switch between project options of the Set while the project is open.)*



This icon indicates that the project has not been synced to the cloud.



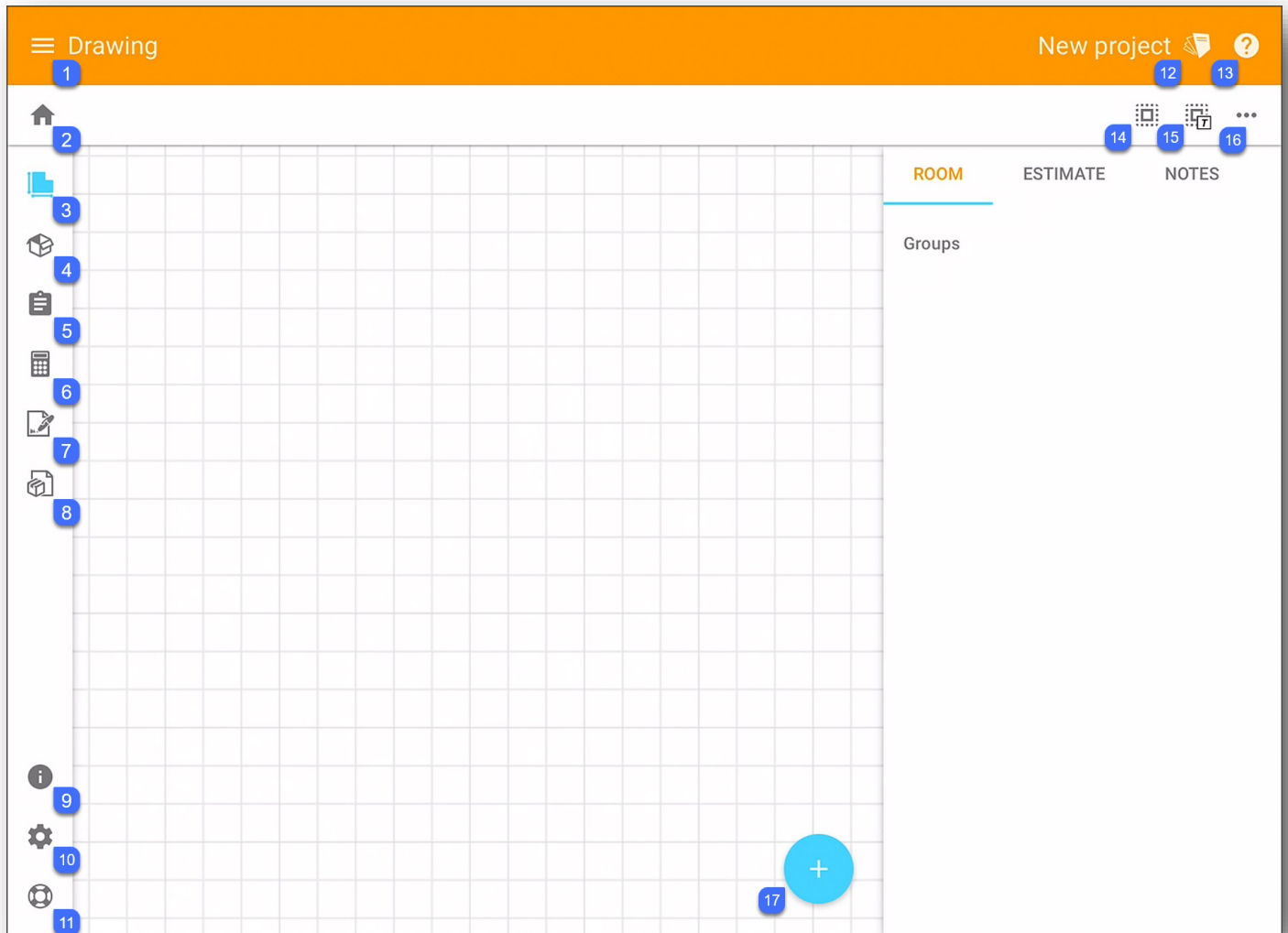
# Add Project Screen

The screenshot shows the 'Add Project' screen with the following elements and callouts:

- 1**: A blue button labeled 'SEARCH STORE FOR CUSTOMER' at the bottom left.
- 2**: A checkbox labeled 'New Customer' in the bottom left section.
- 3**: A checkbox labeled 'New Opportunity' in the bottom left section.
- 4**: A location pin icon next to the 'Address 2' field.
- 5**: A Zillow logo icon next to the 'Address 2' field.
- 6**: A text input field for 'Project Title' containing 'New project'.
- 7**: A dropdown menu for 'Based on Template' with options: 'TOP SELLERS', 'RETAIL', and 'APARTMENTS'.
- 8**: Radio buttons for 'Start project in' with options: 'Drawing' (selected) and 'Worksheet'.
- 9**: A yellow button labeled 'ADD PROJECT' at the bottom right.

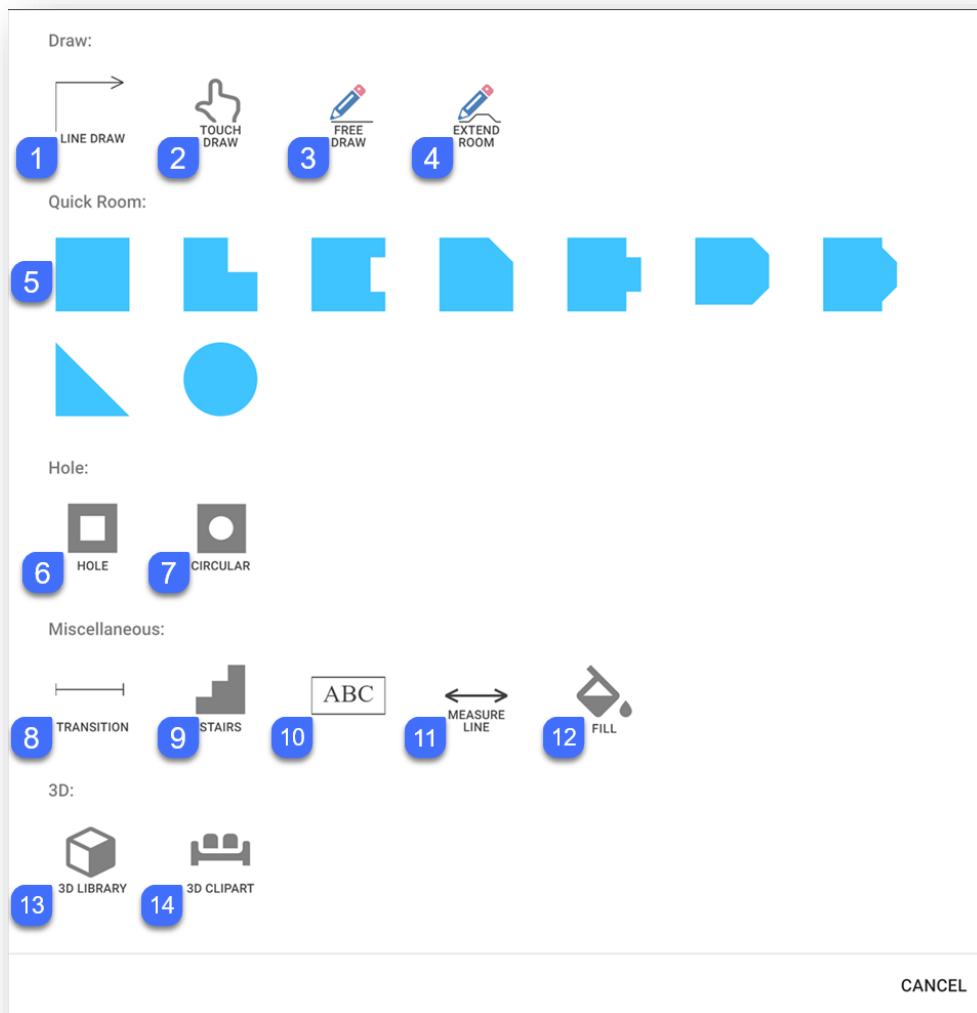
1. Tap to search your RFMS customer file for a customer record to pull it into the Measure Mobile project
2. If you enter a new customer's info, select this checkbox to add them to the customer file
3. Select this checkbox to create a new Sales Lead in CMM (only appears if CMM is active)
4. Tap to google map customer address
5. Tap to view Zillow website info on customer address
6. Rename the project title
7. Select desired template
8. Select to start project in Drawing or Worksheet screen
9. Tap to add project

# Drawing Screen



1. Menu
2. Return to Projects Home screen
3. Drawing
4. Products
5. Checklists
6. Worksheet
7. Proposal
8. Installation
9. Project Information
10. Project Settings
11. Link to Support site
12. Project Set
13. On screen tool tips
14. Multi select box
15. Multi select transitions
16. Toggle sidebar
17. Add Menu. (Add rooms, doors, stairs, text boxes, holes, and clipart)

# Add Menu

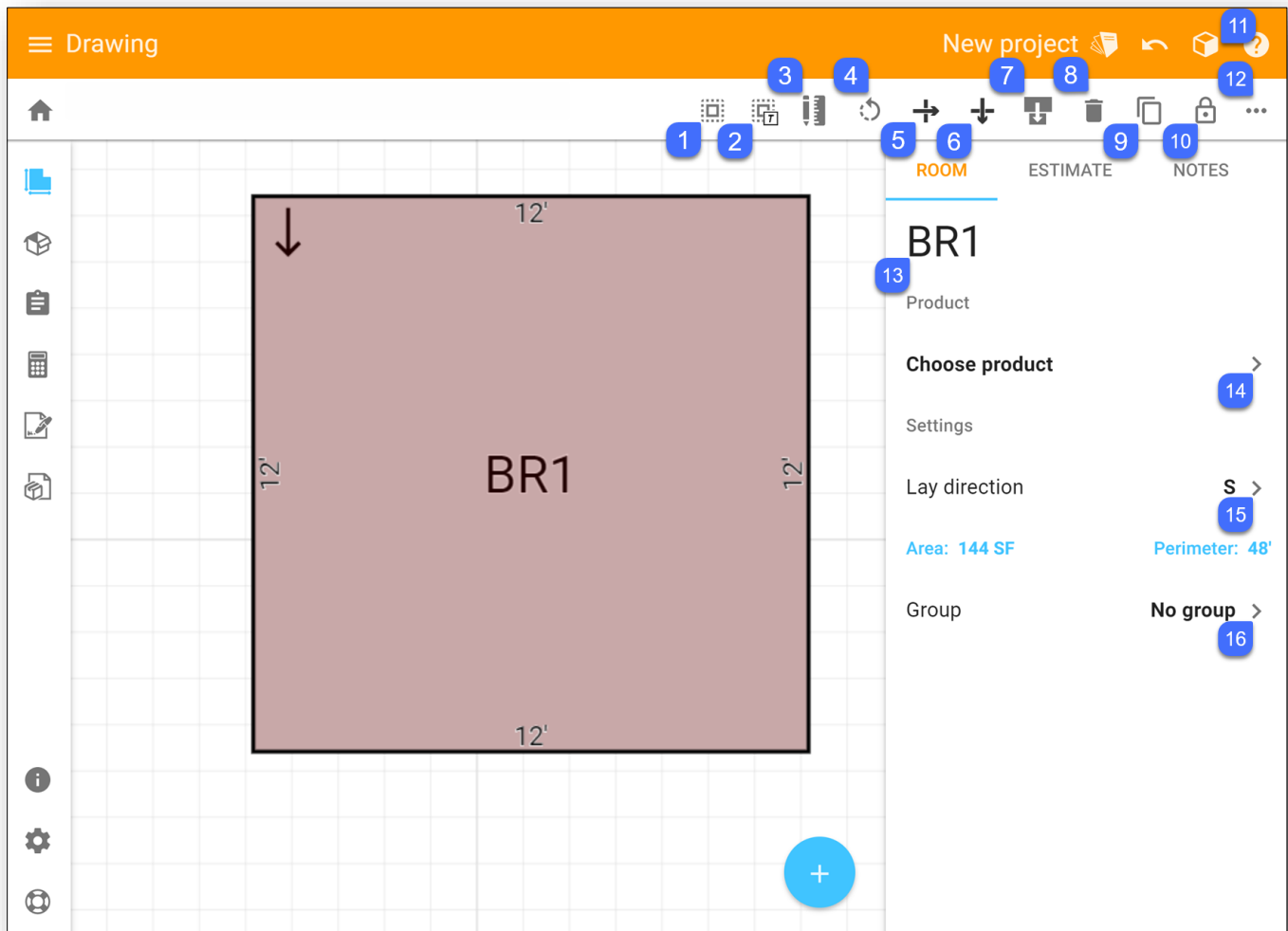


+ Tap plus icon to access add menu

1. Line draw allows you to draw a room wall by wall
2. Touch draw allows you to draw shape of a room and then apply dimensions to it
3. Free draw allows you to draw a room by placing points on the drawing area
4. Add a new section to an existing room
5. Quick room drops in predefined shape of room and can then be edited
6. Add a square or rectangular hole to a selected room
7. Add a circular hole to a selected room
8. Add a transition to a selected room
9. Add staircase
10. Add text box directly on your floorplan
11. A measure line between 2 points on your drawing to calculate distance
12. Turn the space between drawn rooms into a room
13. Add from Library of 3D objects created and uploaded from Measure Desktop
14. Add from 3D Clipart Library of common household furniture objects

# Drawing Screen

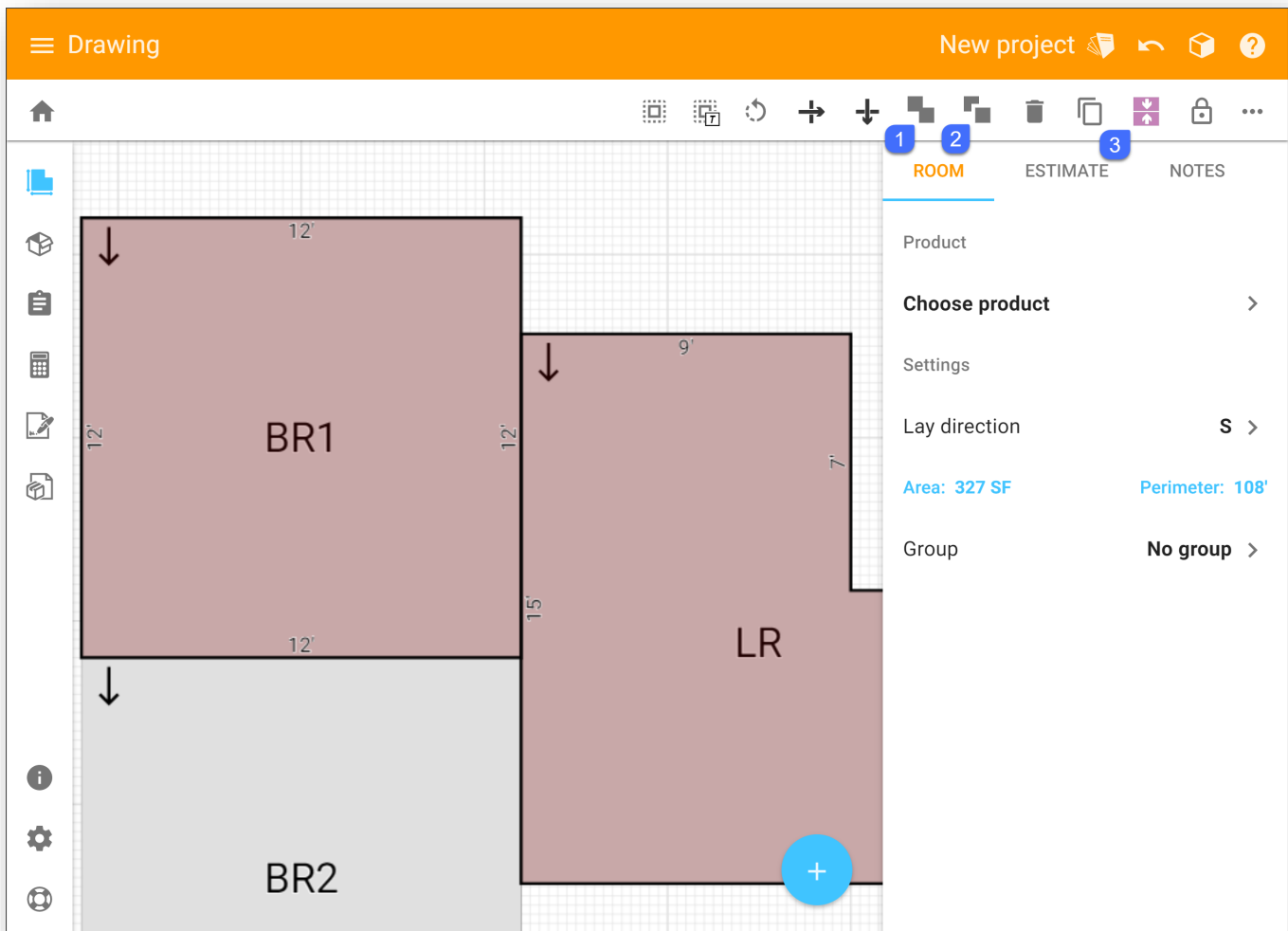
## With 1 Room Selected



1. Boundary box used to select multiple rooms and objects
2. Boundary box used to select transitions
3. Edit selected room
4. Rotate room
5. Flip selected room(s) left/right
6. Flip selected room(s) up/down
7. Split a room into two areas/rooms
8. Deleted selected room(s)
9. Copy/duplicate selected room(s)
10. Lock room location
11. View selected room in 3D
12. Hide side bar
13. Edit name of selected room
14. Choose product for selected room(s)
15. Edit lay direction of material in selected room(s)
16. Assign room to a group

# Drawing Screen

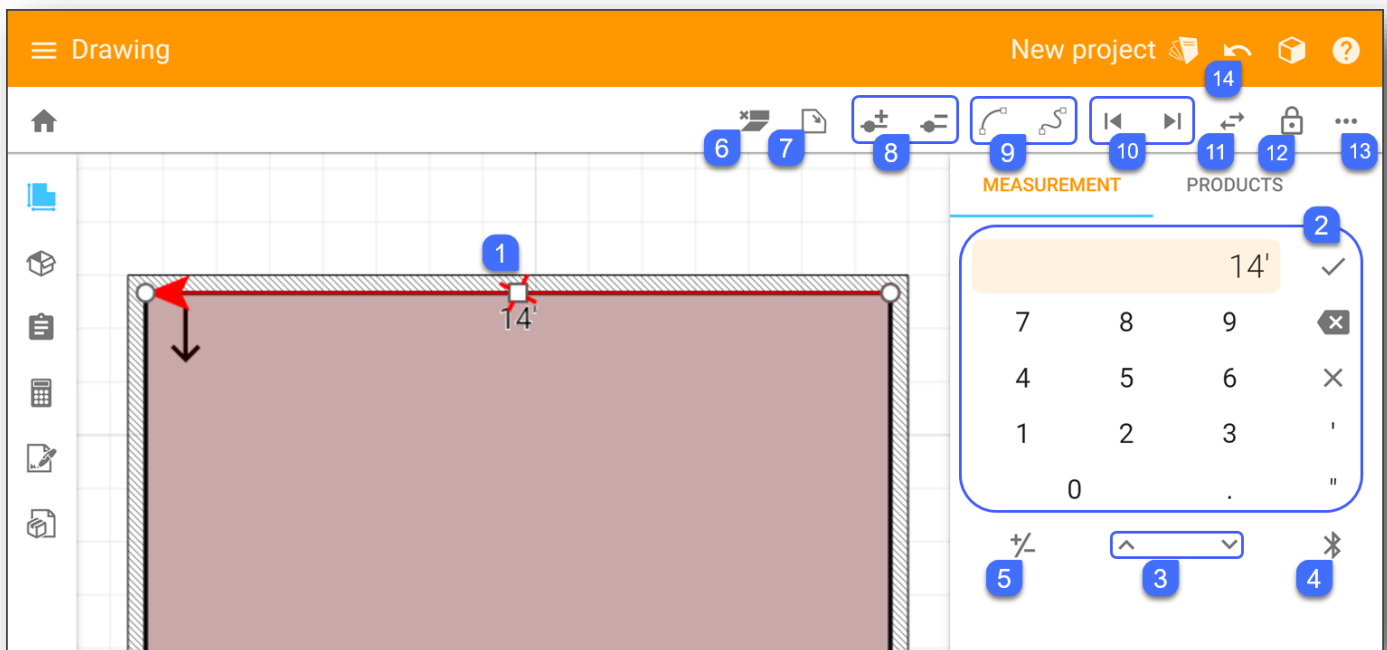
## With Multiple Rooms Selected



1. Join selected rooms
2. Punch out smaller area/room from larger area/room
3. Align

# Drawing Screen

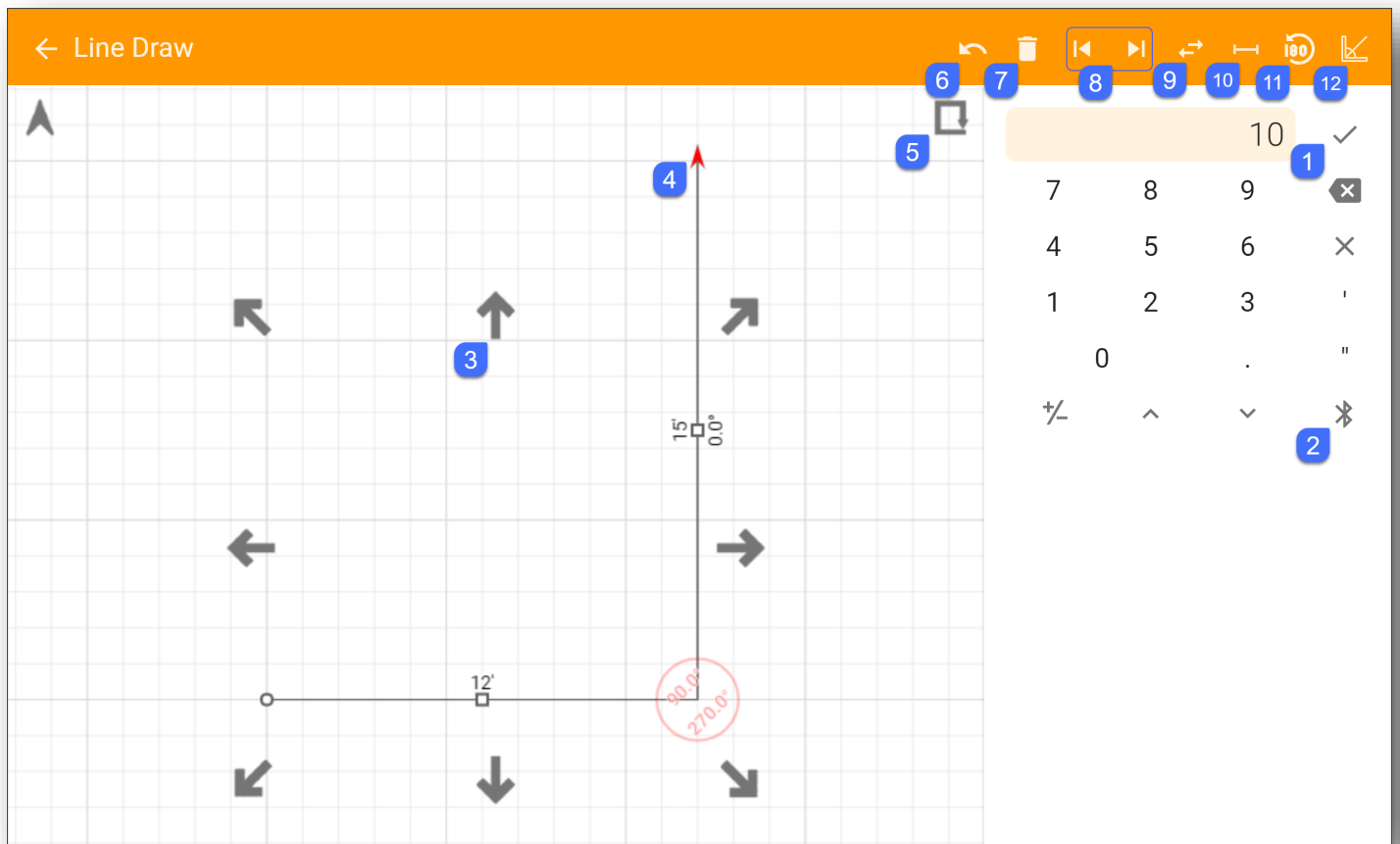
## Edit Mode



1. Tap on square to select wall to edit
2. Use keypad to enter desired measurement and tap checkmark to confirm
3. Increase/decrease measurement by 1" (or snapping amount)
4. Connect Leica Disto laser
5. Add/subtract next measurement from previous measurement
6. Toggle wall for 3D view
7. Match lay direction to wall direction
8. Add/Delete a point to selected wall
9. Add curve to selected wall
10. Move to previous/next wall
11. Flip direction of red arrow
12. Lock/unlock room location
13. Hide side bar
14. Undo last action

# Drawing Screen

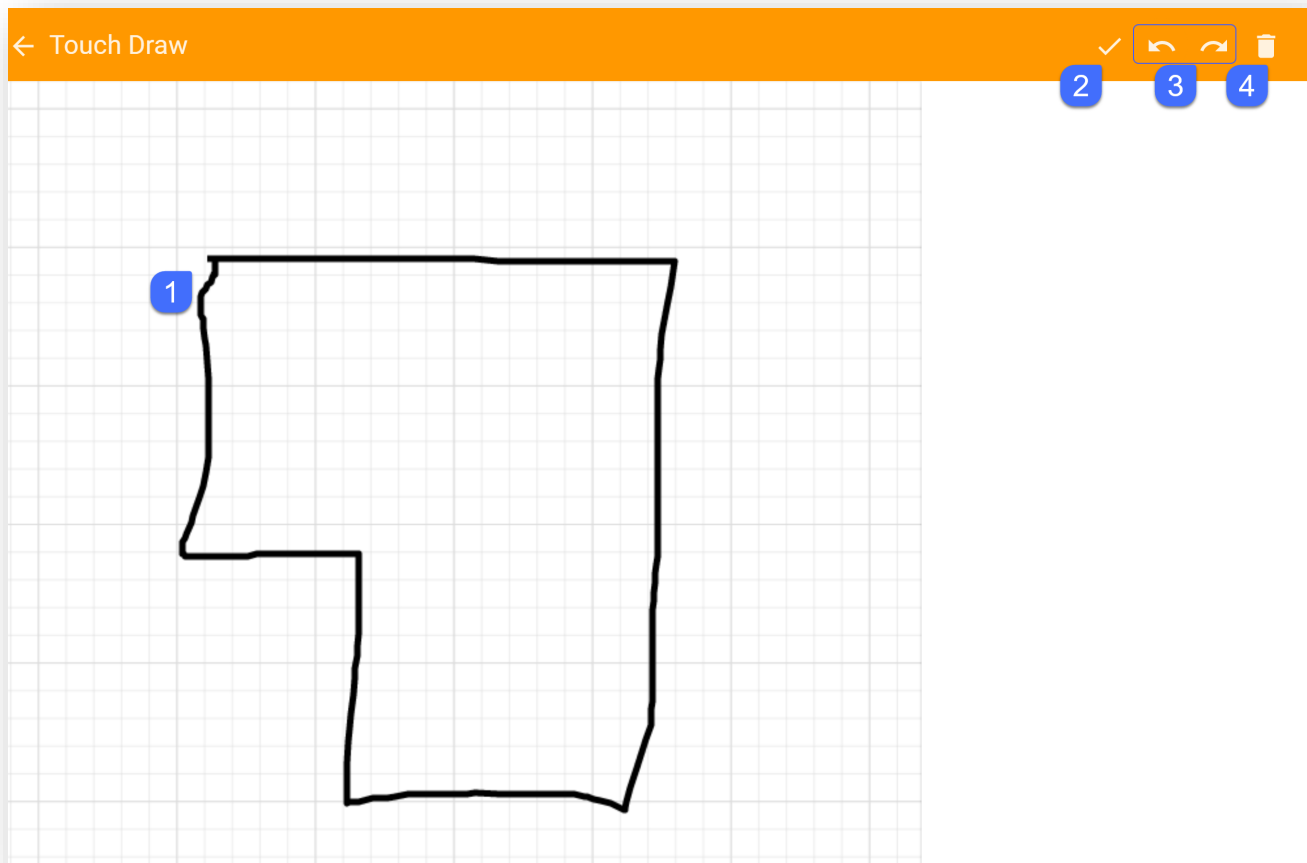
## Line Draw



1. Use keypad to enter desired measurement and tap checkmark to confirm
2. Connect Leica Disto laser
3. Once dimension entered, use arrows to indicate wall direction
4. Red arrow indicates starting location of next wall (red arrow can also be dragged to adjust angle of last wall drawn)
5. Close room icon (draws your last wall and closes room)
6. Undo last wall
7. Delete room
8. Return to previous wall/go to next wall
9. Bring red arrow to initial start point
10. Add transition
11. Flip wall 180°
12. Snap to 45° angle increments

# Drawing Screen

## Touch Draw

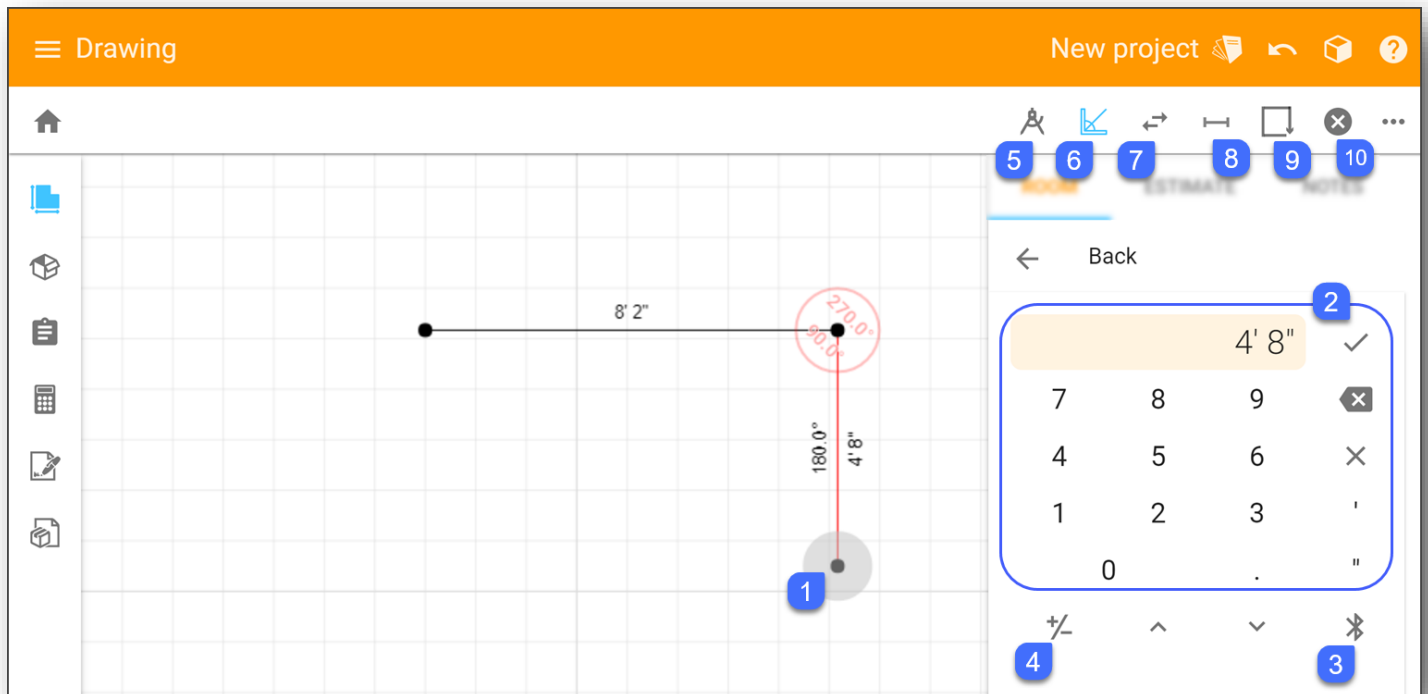


1. Use your finger or stylus to draw shape of room (all lines must touch)
2. Accepts your drawing (also straightens out lines)
3. Undo/redo last action
4. Delete your drawing



# Drawing Screen

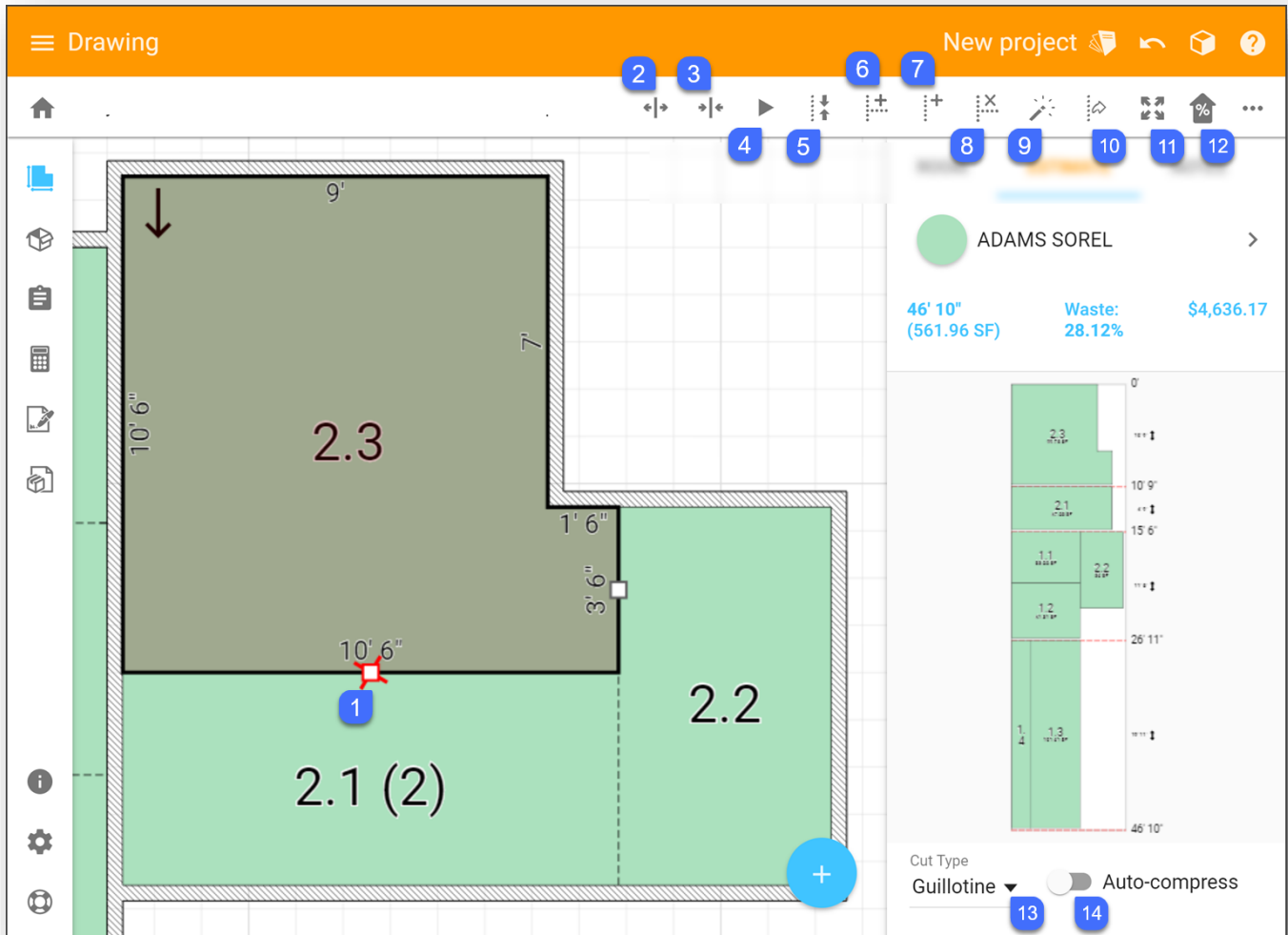
## Free Draw



1. Tap to place point in drawing area. Last point placed is highlighted in grey
2. Use keypad to enter desired measurement and tap checkmark to confirm
3. Connect Leica Disto laser
4. Add/subtract next measurement from previous measurement
5. Calculate wall angle
6. Toggle angle snapping of 45° increments
7. Change line segment the next will be drawn from
8. Insert transition
9. Close room
10. Cancel Free Draw

# Drawing Screen—Estimate Tab

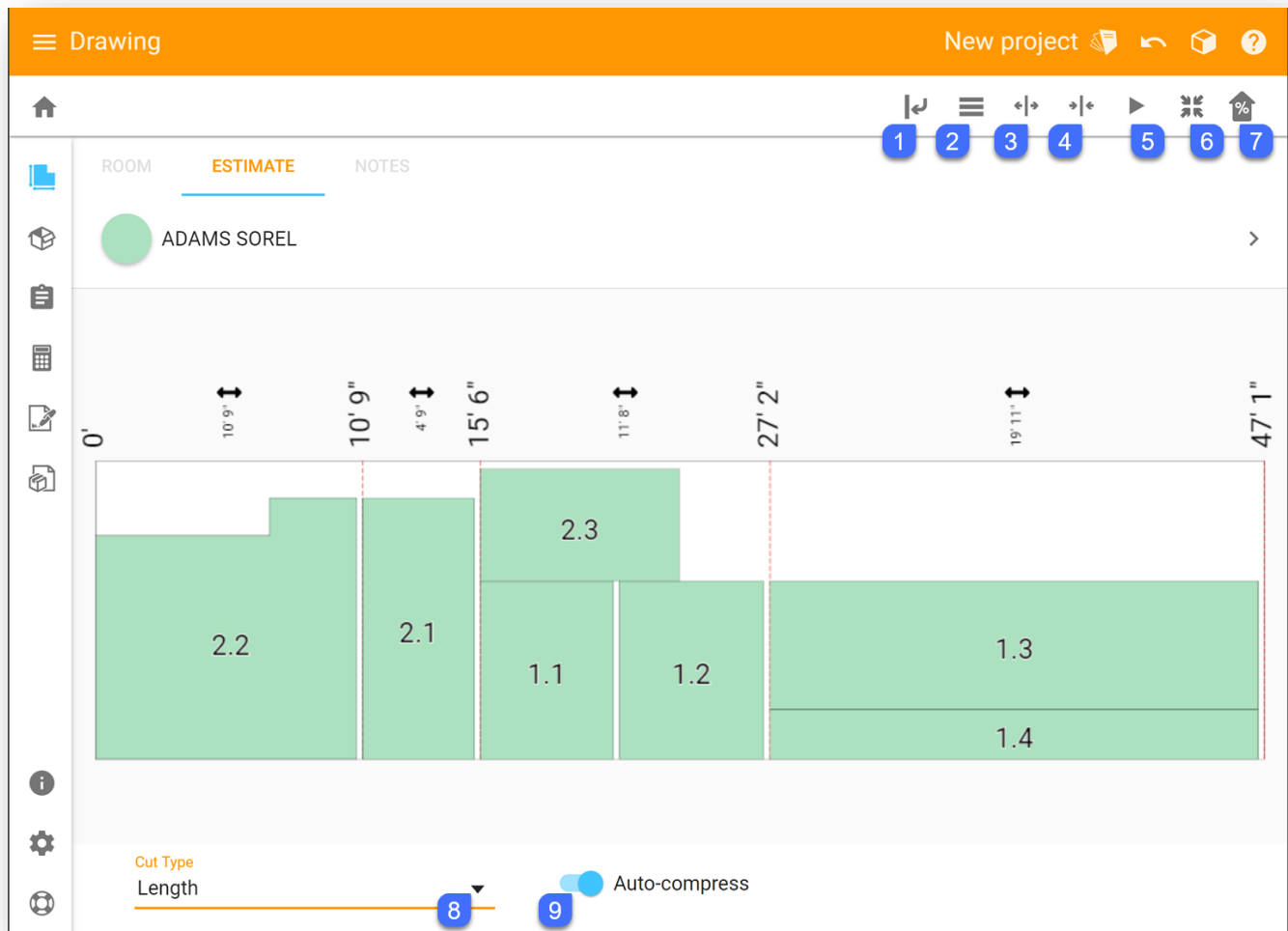
## Roll Product



1. Select square to drag it to move seam
2. Place splitter line on the roll. Material below line will be placed in another cut group.
3. Join cut groups together
4. Automatically moves cuts to reduce waste
5. Combines cuts that don't need to be split
6. Add T-seam
7. Add Room seam
8. Eliminate selected seam
9. Resets cuts to initial allocation
10. Flips seams to opposite side of room
11. Expand cut plan to full screen
12. Add extra waste
13. Adjust cut gap type
14. Toggle Auto-compress

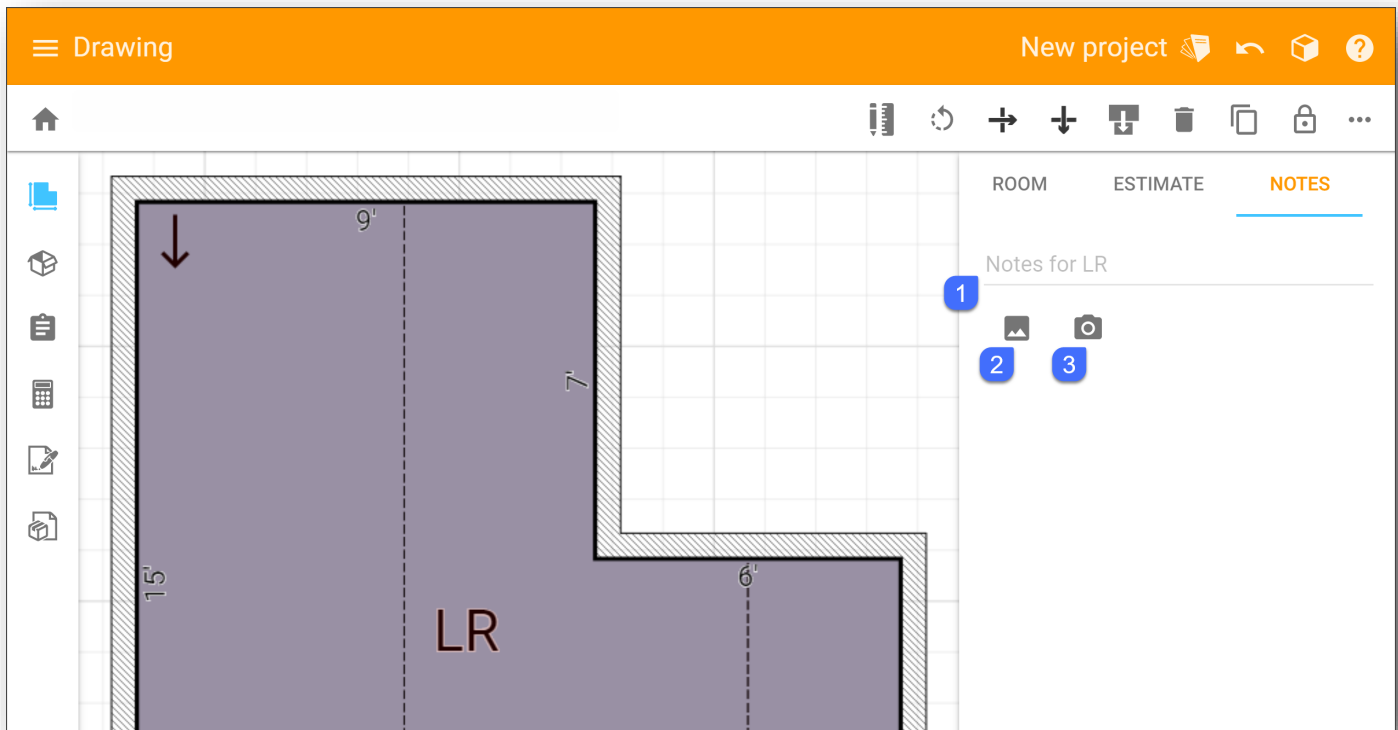
# Drawing Screen—Estimate Tab

## Full Screen



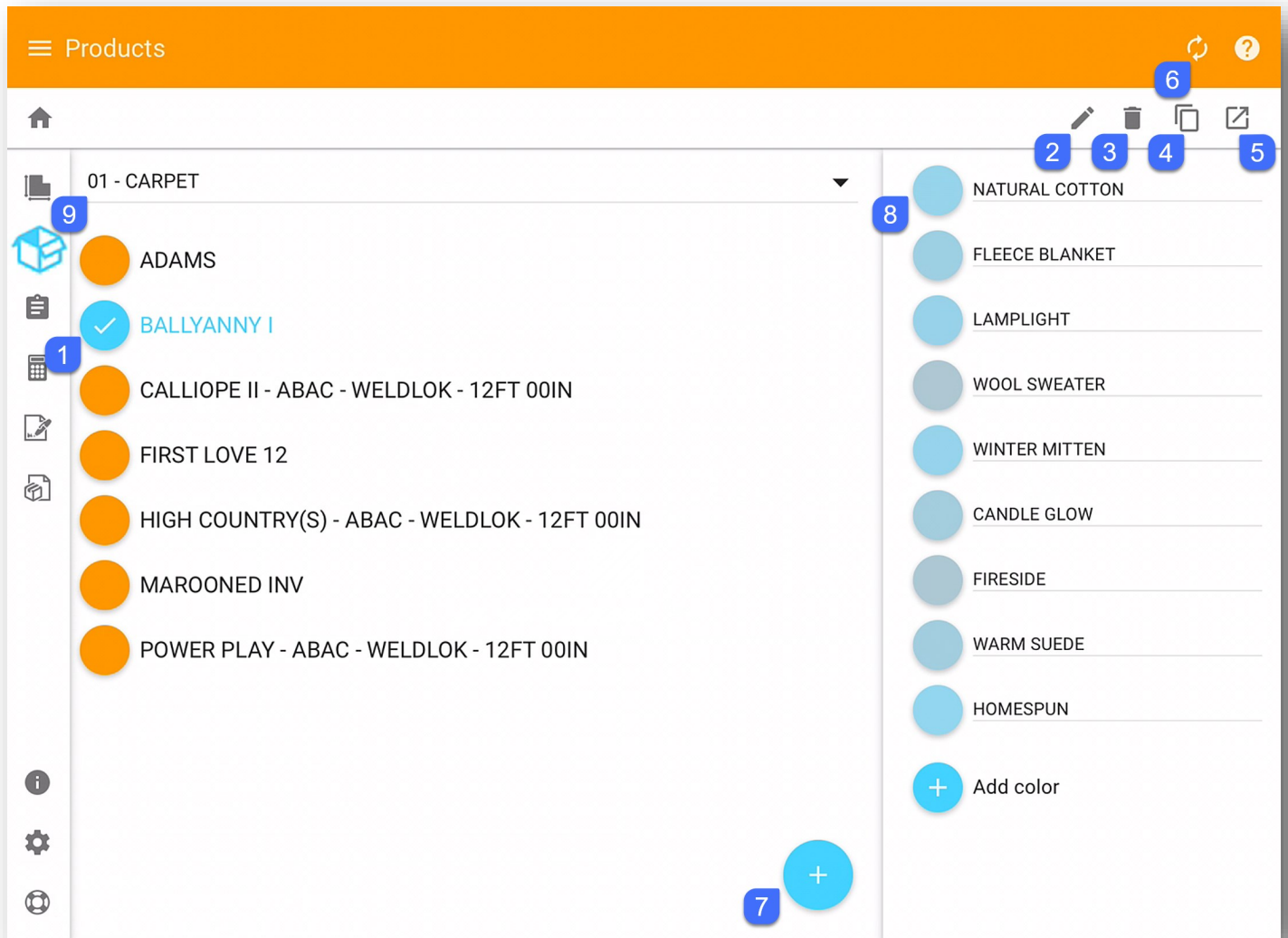
1. Rotate cut plan
2. Allow cut groups to be viewed side by side
3. Use splitter line to add/divide cut group(s)
4. Combine cut groups
5. Auto minimize waste. (This will change any cuts you have moved manually)
6. Exit FULL SCREEN cut plan mode
7. Add extra waste
8. Change cut type
9. Toggle Auto-compress

# Drawing Screen—Notes Tab



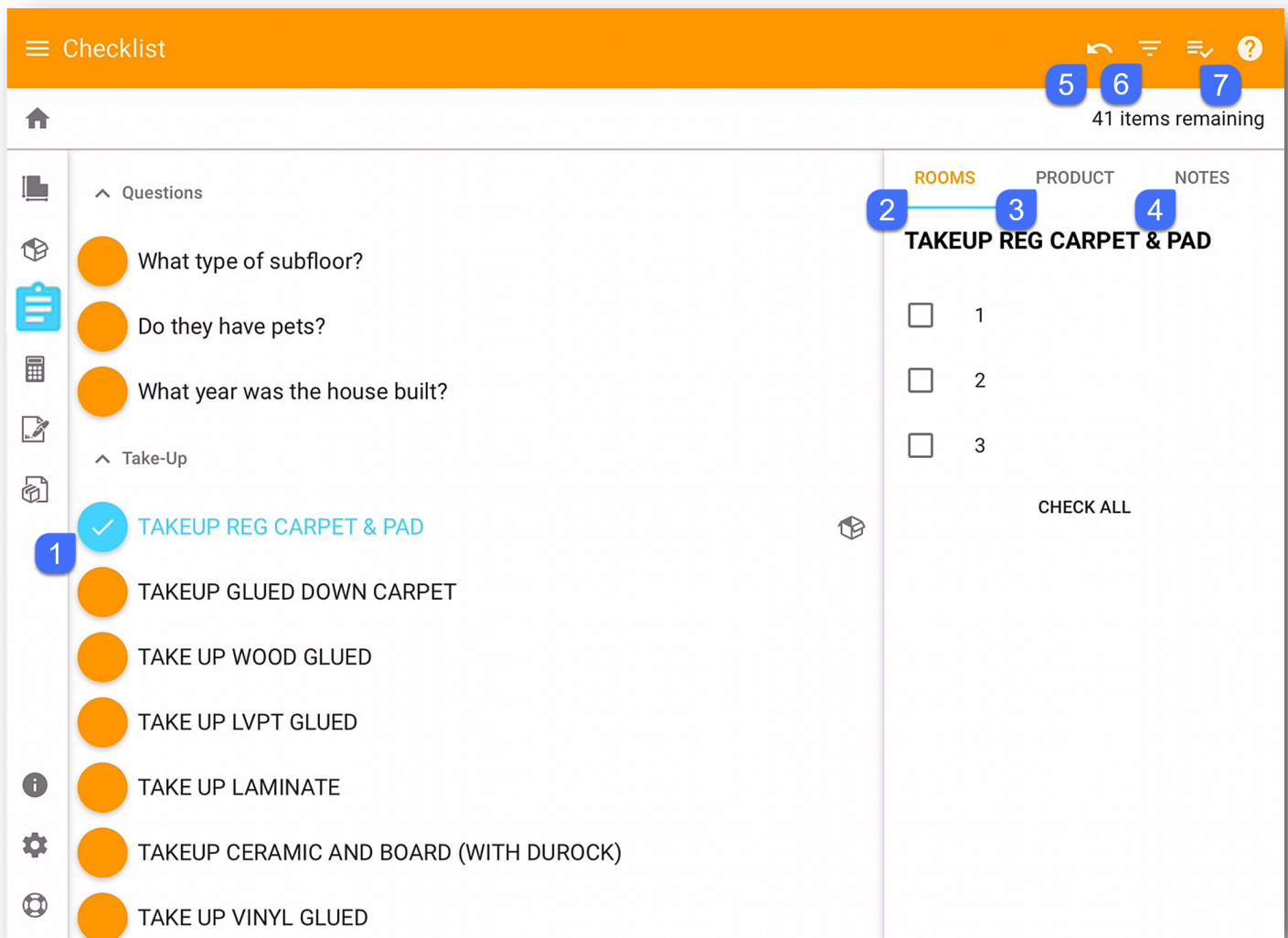
1. Enter notes for selected room
  2. Insert existing picture from your device
  3. Take picture with your device's camera
- \*Note** – Turns into Project Notes when no room is selected

# Products Screen



1. Select product
2. Edit selected product
3. Delete selected product
4. Duplicate selected product
5. View selected product in RFMS Mobile
6. Refresh pricing from database
7. Add product to project
8. Select color to change display color, check inventory or indicate sample taken
9. Toggle product code

# Checklist Screen



1. Select checklist item
2. Select rooms checklist item applies to
3. Select quantity for checklist item selected
4. Enter notes and/or take pictures for checklist item selected
5. Undo action
6. Filter Checklist
7. View checklist menu

# Worksheet Screen

The screenshot shows a software interface for managing a worksheet. The top bar is orange and contains the title 'Worksheet' and 'STICKLY, STICK - Option 1'. Below this is a navigation bar with icons for home, list, and search. The main area is divided into three columns. The left column lists line items with their descriptions and quantities. The middle column shows prices and totals. The right column provides details for the selected line, including product information, calculation options, and a 'RETAIL INSTALLED' status. Numbered callouts (1-14) are placed over various UI elements to indicate their functions.

Line Item	Quantity	Price	Total
CALLIOPE II - ABAC - WELDLOK - 12FT 00IN: COFFEE	32 SY @ \$18.90   Waste: 36.46%   Extra Waste: 0%	\$604.80	\$604.80
INSTL ACCESS - SETTING MATERIAL - 3/16 LEVELING SYSTM: GREEN	183 SF @ \$1.36   Extra Waste: 0 SF	\$248.34	\$248.34
INSTL ACCESS - SETTING MATERIAL - 1/8 LEVELING SYSTM: RED	300 SF @ \$1.66   Waste: 1.29%   Extra Waste: 0 SF	\$496.68	\$496.68
PANORAMA COVEBA: ASH	404 EA @ \$22.38   Waste: 4.58%   Extra Waste: 0 EA	\$9,041.52	\$9,041.52
TAKEUP CARPET REG CARPET & PAD TSC	0 SF @ \$0.14   Extra Waste: 0%	\$0.00	\$0.00
<b>Material:</b>		\$10,391.34	\$10,391.34
<b>Service:</b>		\$0.00	\$0.00
<b>Total:</b>		\$10,391.34	\$10,391.34

1. Select line
2. Change price for selected line(s)
3. Select/deselect all lines
4. Delete selected line(s)
5. Duplicate selected line
6. Fix the grand total
7. Add line to worksheet
8. Opens calculator
9. Discount
10. Refresh prices from RFMS
11. Send to RFMS
12. Drag line up or down to adjust order of lines
13. Verify rooms for selected line
14. Enter notes and/or take pictures for selected line

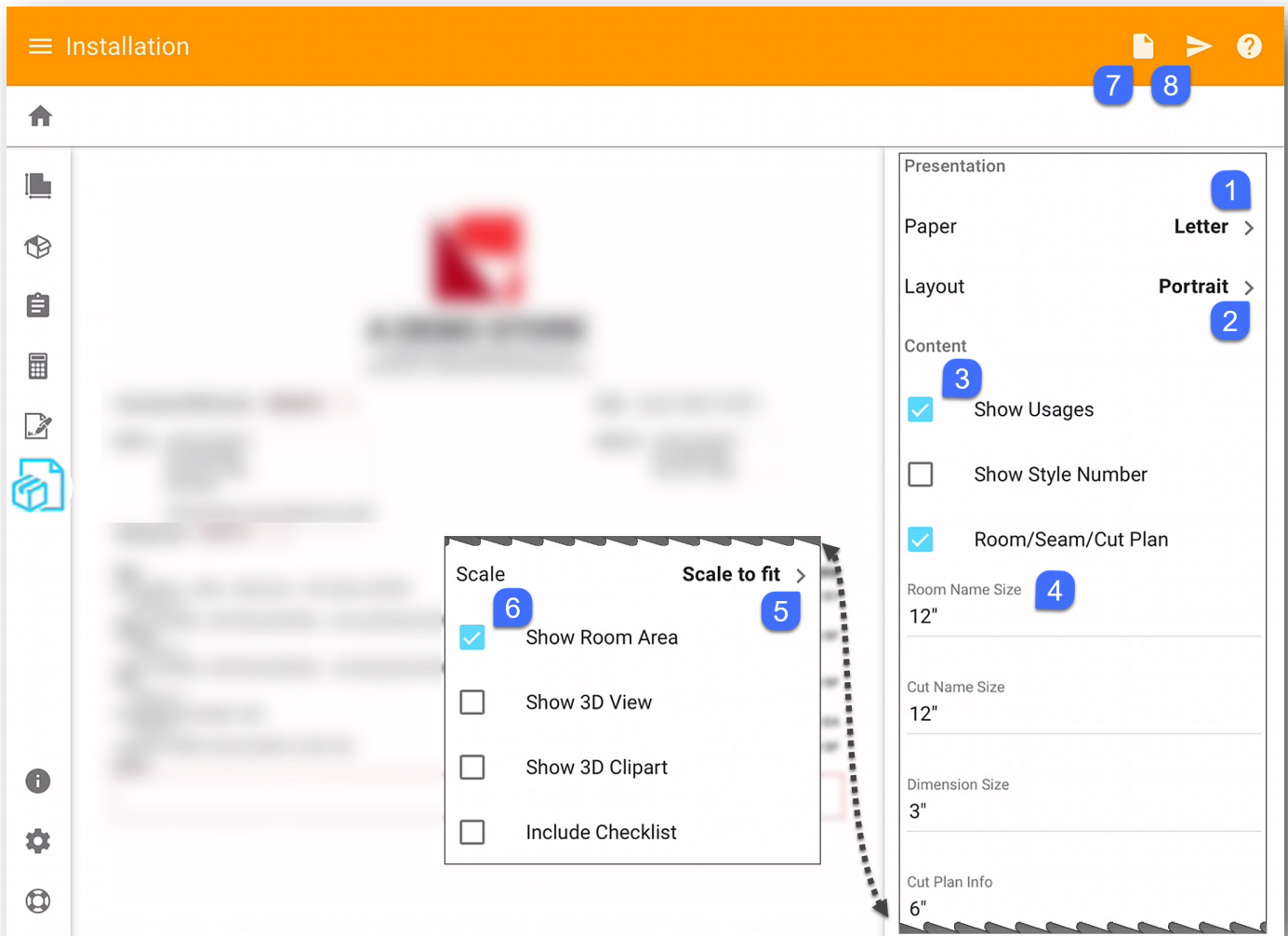
# Proposal Screen

The screenshot shows a mobile application interface for creating a proposal. At the top is an orange header with a menu icon and the word "Proposal". On the right side of the header are icons for file, share, lock, and help, with callouts 5, 6, 7, and 8 respectively. Below the header is a navigation bar with icons for home, list, cube, clipboard, calculator, document, and settings. The main content area is divided into two columns. The left column displays a proposal form for "A DEMO STORE" with fields for associated RFMS quote (ES900181), date (Aug 26, 2020 10:45 AM), bill to, and ship to information. Below this is a table with columns for Item, Quantity, Price, and Amount, listing various flooring items and their costs. A summary at the bottom right of the table shows Material: \$10,391.34, Service: \$0.00, and Total: \$10,391.34. A "Notes" field is at the bottom left. The right column contains settings for Paper (Letter), Layout (Portrait), Content (with a list of checkboxes for Show Line Quantities, Show Line Amounts, Show Unit Price, Show Subtotals, Show Usages, Show Style Number, Room Plan, and Include Checklist), and Terms and Conditions. Callouts 1, 2, 3, and 4 point to these settings. Callout 1 points to Paper, 2 to Layout, 3 to the Content list, and 4 to Terms and Conditions.

1. Adjust paper size of proposal document
  2. Adjust layout to portrait or landscape of proposal document
  3. Select content to display (checked shows content/unchecked hides content)
  4. Select which Terms and Conditions to add
  5. Preview proposal document
  6. Email, share, or send proposal document to RFMS
  7. Finalize project
  8. Accept payment
- \*Note – Best Practice for RFMS Users: Use RFMS Mobile to generate a Quote or Order PDF and Post Payment**



# Installation Screen



1. Adjust paper size of installation document
2. Adjust layout to portrait or landscape of installation document
3. Select content to display (checked shows content/unchecked hides content)
4. Adjust font size on installation document of the 4 different fields
5. Set scale of included drawing
6. Select additional items to display on drawing
7. Preview installation document
8. Email, share or send installation document to RFMS