



R.F. MacDonald Co.
your boiler & pump solutions team
~ since 1956

QUICK START GUIDE

Welcome to RFM Job Scope

Your first 10 minutes — account, sign in, first job.

This short guide gets you up and running. For the complete reference, see the full RFM Job Scope User Manual.

RFM Job Scope is the RFM sales app for building job estimates, managing customers, and sending quotes to NetSuite. Follow the steps below to get started — it only takes a few minutes.

GET SET UP

1 Activate your account

You'll receive an **invite email** from RFM Job Scope.

1. Open the email and click **Accept Invite** (the link is valid for 24 hours).
2. Create your **password**.
3. You're in — the app opens to your dashboard.



LINK EXPIRED?

If more than 24 hours have passed, ask your office admin to resend the invite from **People → Team → Manage Users**.

2 Sign in

1. Go to the RFM Job Scope web address (bookmark it for next time).
2. Enter your **username** — just the part before @. The `@rfmacdonald.com` domain is added for you.
3. Enter your password and sign in.

For security, the app signs you out after 15 minutes of inactivity (with a warning first). Any click or keystroke resets the timer.

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Install it on your phone (recommended)

RFM Job Scope installs like an app, with a home-screen icon and no browser bar.

- **iPhone (Safari):** tap **Share** → **Add to Home Screen** → **Add**.
- **Android (Chrome):** tap the **:** menu → **Install app** → confirm.

FIND YOUR WAY AROUND

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The main sections

Use the sidebar (desktop) or bottom bar (mobile) to move between sections:

Home — dashboard

Jobs — your estimates

People — customers & team

Reports — exports

Files

Help

CREATE YOUR FIRST JOB

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Add a customer

Every job needs a customer. To add one:

1. Go to **People** → **Customers**.
2. Click **New Customer**.
3. Enter the **Company Name** (the only required field) and save.

Open a customer to add contacts and equipment on their tabs — these can be linked to jobs later.

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Create a job

From the **Dashboard** or **Jobs** page, click **New Job** and follow the 5-step wizard:

1. **Select Customer** — search or pick from the list.
2. **Select Category** — Boiler or Pump.
3. **Select Job Type** — e.g. AM Job Estimate, EMP Estimate, Pump Quote.
4. **Project Name** — optional.
5. **Select Equipment** — optional; pick from the customer or add new.

Make sure your profile has an **Office** assigned — you'll be prompted to add one if it's missing.

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Fill it out & submit

Complete the estimate fields, then submit using the button at the bottom:

- **Submit to Quote** — appears when your margin meets the auto-approve threshold. The job is approved instantly, no review needed.
- **Submit for Review** — appears otherwise. Your manager reviews and approves or returns it with notes.

Once approved, a manager marks the job **Uploaded** after entering it in NetSuite. You can share all job files anytime with the **Share Link** button.



NEED HELP?

Open the **Help** section for FAQs, tutorials, and release notes — or use **Report a Problem** at the bottom of that page. For anything urgent, contact your office manager.