

# Contents

- Setup Guide I . . . . . 1**
- Logging in to SIMMS . . . . . 1**
  - Connect to Your Company's Database . . . . . 1**
  - Log in to SIMMS . . . . . 3**
- Registering Your Software . . . . . 3**
  - Register Your Software. . . . . 3**
- Creating Your Company Database . . . . . 4**
  - Create Your Company Database . . . . . 4**
  - About the Mass Copy Inventory Window . . . . . 4**
  - Mass Copy Data . . . . . 4**
  - About the Setup Step by Step Window . . . . . 4**
  - Use the Setup Step by Step Window . . . . . 5**
- Company Information . . . . . 5**
  - Enter Your Company Information . . . . . 5**
  - Enter Alternative Company Information . . . . . 5**
  - Change the Start Page Image. . . . . 5**
- Locations . . . . . 6**
  - Add a Location . . . . . 6**
  - Add a Location's Address to the Address Manager . . . . . 7**
  - Assign a Customer to a Location. . . . . 7**
  - Assign a Vendor to a Location . . . . . 7**
  - Print Labels (Locations) . . . . . 8**
- Categories and Subcategories . . . . . 8**
  - Create a Category . . . . . 8**

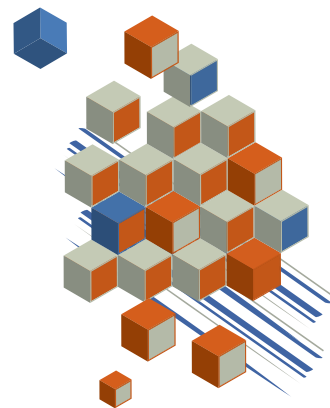
<b>Add a Subcategory to a Category</b> . . . . .	8
<b>Units of Measure</b> . . . . .	8
<b>Create a Unit of Measure</b> . . . . .	9
<b>Define a Relation Between Units of Measures</b> . . . . .	9
<b>Taxes</b> . . . . .	10
<b>Create a Tax Code</b> . . . . .	10
<b>Create a Tax Schedule</b> . . . . .	11
<b>Add Tax Details to Your Tax Schedule</b> . . . . .	11
<b>Departments</b> . . . . .	11
<b>Create a Department</b> . . . . .	11
<b>Shipping Methods</b> . . . . .	12
<b>Add a Shipping Method.</b> . . . . .	12
<b>Edit a Shipping Method.</b> . . . . .	12
<b>Stock-Keeping Units (SKU)</b> . . . . .	12
<b>Define Your SKU Formula</b> . . . . .	13
<b>Branches</b> . . . . .	14
<b>Add Your Main Branch</b> . . . . .	14
<b>Add a Branch</b> . . . . .	14
<b>Assign Users to a Branch</b> . . . . .	15
<b>Add Locations to a Branch.</b> . . . . .	15
<b>Multi-Currency</b> . . . . .	15
<b>Specify Your Default Currency</b> . . . . .	15
<b>Add a Foreign Currency</b> . . . . .	16



# Setup Guide I

**SIMMS** Inventory Management Software 8.0

January 10, 2012



# Setup Guide I

This document covers how to complete the following tasks:


- Register your SIMMS software.
- Create your company database.
- Enter your company information.
- Create your locations.
- Create your units of measure.
- Create your categories.
- Create your tax schedules.

You need to complete these tasks to use SIMMS. There are additional tasks you will need to complete before you can start using SIMMS. They include adding your inventory items in the Item Manager; adding your customers in the Customer Manager; adding your vendors to the Vendor Manager; and configuring your global settings.

## Logging in to SIMMS

Each time you start SIMMS you need to log in to use the software. The first time you log in you must establish your database connection. This requires that you specify the SQL Server that hosts your company's database. You only need to do this once, at your first log in.

## Connect to Your Company's Database

1. Start SIMMS. In the **Login Information** window, click the **DB Connection** link.
2. Click the **Ellipsis** button  adjacent to the **Server Name** list.

This refreshes the list of available SQL servers.

3. In the **Server Name** list, select the name of the SQL server that host your company's database.

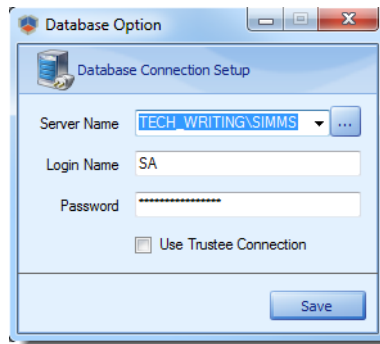


Figure 1: Connect to your company's database.

4. Do one of the following steps:
  - Click the **Use Trusted Connection** check box.  
If selected the SQL server uses your Windows Authentication to validate your access to the SQL server instance. The result is that you do not need to enter an SQL server login name or password.
  - In the **Login Name** text box, type your SQL server login name. In the **Password** text box, type your SQL server password.  
The default login name is **sa**. The default password is **Allyoucaneat123!**.
5. Click **Save**.

## Log in to SIMMS

1. If not already started, start SIMMS.
2. In the **Username** text box, type your user name.

The default user name is **admin**.

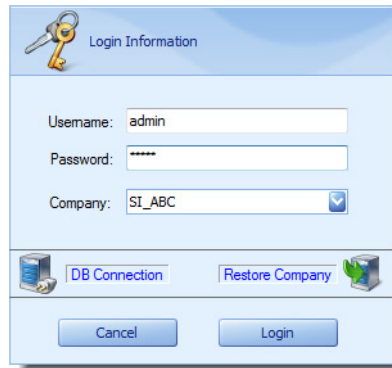


Figure 2: The Login Information window.

3. In the **Password** text box, type your password.  
The default password is **admin**.
4. If not already selected, in the **Company** list, select your company's database.  
If you have not created your company database yet, log in to SIMMS' default database SI\_ABC.
5. Click **Login**.

## Registering Your Software

You need to register your SIMMS software with KCSI. Before you do this, contact KCSI for your PIN code. You will need this PIN code as part of the registration process.

### Register Your Software

1. Open the **Setup** menu, and then click **Register**.
2. In the **PIN** text box, type the six character PIN code you received from KCSI.
3. Click **Online Registration**.
4. Type the appropriate information in the text boxes.  
Your company name is mandatory.
5. Click **Check for Registration Updates**.

SIMMS confirms your registration and updates your version of SIMMS.

# Creating Your Company Database

Your company database holds all the information related to your company. This includes your contacts, inventory, transactions, and more.

## Create Your Company Database

1. Open the **Administration** menu, and then click **Company Manager**.
2. Click **New**
3. In the **Company Code** text box, type the name of your company's database.
4. Click **Save**.
5. Click **Next**.

You will need to click Next several times to continue the creation of your company's database.

6. Click **Close**.

You will need to click Close several times to complete the creation of your company's database.

## About the Mass Copy Inventory Window

After SIMMS creates your database, the Mass Copy Inventory window opens. Use this window to import data from an existing database to your new database.

If you do not want to import data from an existing database, or you do not have an existing database, simply close the Mass Copy Inventory window to continue the setup process.

## Mass Copy Data

1. In the **Importing from** list, select the database from which you want to import its data.
2. Click the check boxes to select the data you want to import.
3. Click **Import**.
4. After SIMMS has imported your data, close the Mass Copy Inventory window.

## About the Setup Step by Step Window

After you close the Mass Copy Inventory window, the Setup Step by Step window opens. Use this window to guide you through most of the tasks you need to complete before using SIMMS.

Close the Setup Step by Step window if you do not want to use it.

## Use the Setup Step by Step Window

- ◆ In the **Setup Step by Step** window, click **Next**.

SIMMS opens the Company Information window. In this window you enter your company's information. After you have completed entering this information, close the window. Return to the Setup Step by Step window, and click Next to continue with the next setup task listed.

## Company Information

Your company information includes your company's address, phone number, fax, and so on. These details appear on your printed transactions such as your invoices and purchase orders. Your company information also includes your federal ID/ABN/GST No. This information only appears on your sales orders and invoices. The address you enter as part of your company information is used as your default bill-to and ship-to address.


SIMMS has an Address Manager in which you can enter alternative addresses for your company. You can replace your default bill-to or ship-to address on a transaction with any of the addresses you entered in the Address Manager.

## Enter Your Company Information

1. Open the **Setup** menu, click **Company Information**.
2. In the appropriate boxes enter your company's information.

There are two information fields that you can use for any purpose. The content of these fields appear on your transactions.

## Enter Alternative Company Information

1. In the **Company Information** window, click **Ship-To**.
2. Click the **Plus Sign** .
3. In the row that is added to the grid, enter the details of your alternative company information.
4. Click **Save**.

## Change the Start Page Image

You can change the image that appears on SIMMS' start page.

1. In the **Company Information** window, click **Load Picture**.
2. Locate your image, and then click **Open**.
3. Click **Save**.

## Locations

Each location within SIMMS has a location code. These codes represent the physical place you stage or store your inventory. Location codes are used extensively throughout SIMMS and are critical to managing your inventory.

There are additional features you can use with your locations. For instance, you can limit the capacity of a location by volume or a single pallet. SIMMS will alert you if you try to store more items in a location than its set capacity allows.

You can assign a location to a customer or vendor. The assigned location is for the exclusive use of that customer or vendor. One reason you might want to assign a location to a customer is if the customer sells your inventory on consignment. Any inventory that is taken by the customer would be transferred to their assigned location. You can then easily track the inventory a customer has in their possession by their assigned location. You might want to assign a location to a vendor to make certain that items bought from that vendor are stored in a specific place, their assigned location.

You can record a location's address in the Address Manager. You can then use these alternate addresses to replace your default ship-to and bill-to address for purchase orders and receipt of goods.

### Add a Location

1. Open the **Setup** menu, and then click **Locations**.

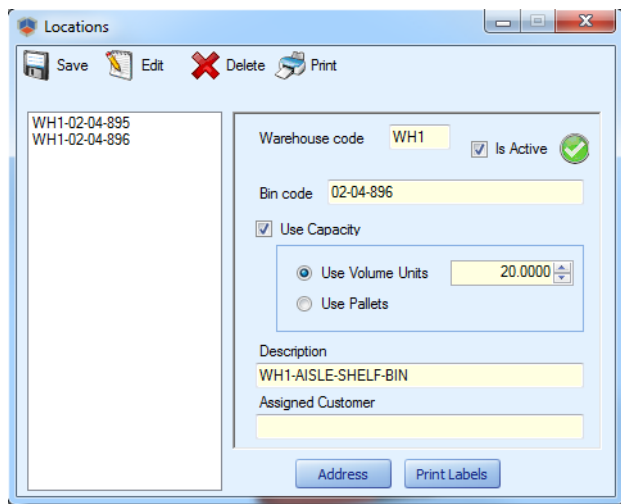



Figure 3: Locations.

2. In the **Warehouse code** text box, type a warehouse code. Your warehouse code can be up to three characters long.



3. In the **Bin code** text box, type a bin code.  
Your bin code can be up to ten characters long.
4. (Optional) Click the **Use Capacity** check box, and then do one of the following steps:
  - To limit a location by a specific volume. Click **Use Volume Units**. In the adjacent box, type the capacity of the location.  
  
In the Item Manager, you will need to specify the volume of the item you want to store in this location.  
  
This is the formula SIMMS uses to determine if the capacity of a location is exceeded:  $\text{Item Quantity} \times \text{Item Volume} \leq \text{Location's Capacity}$ .
  - To limit a location to a single pallet, click **Use Pallets**.
5. In the **Description** text, type a description for your location.
6. Click **Save**.

### Add a Location's Address to the Address Manager

1. Open the **Locations** window, and then click **Address**.
2. Click the **Plus Sign** .
3. In the grid enter your location's address, and then click **Save**.


### Assign a Customer to a Location


You can assign a customer to a location. This means that the location is for the exclusive use of that customer.

1. Open the **Sales** menu, open the **Sales** submenu, and then click **Customer Manager**.
2. Select a customer, and then click the **Edit** icon .
3. Click the **Advanced** tab. In the **Assign Location** list, select the location you want to assign customer to.
4. Click the **Save** icon .

### Assign a Vendor to a Location

You can assign a vendor to a location. This means that the location is for the exclusive use of that vendor.

1. Open the **Purchasing** menu. Click **Vendor Manager**.
2. Select a vendor, and then click the **Edit** icon .

3. Click the **Advanced** tab. In the **Assign Location** list, select the location you want to assign a vendor to.
4. Click the **Save** icon .

### **Print Labels (Locations)**

1. Open the **Locations** window. Select a location, and then click **Print Labels**.
2. Click the **Print** icon.

## **Categories and Subcategories**

Every inventory item must be assigned to a category. Although not required, you can also assign an item to a subcategory (or even subsubcategory). Use categories and subcategories to organize your inventory items into meaningful groups.

### **Create a Category**

1. Open the **Setup** menu, and then click **Categories - Subcategories**.
2. Drag the **Drag New Category/Subcategory** icon into the window.
3. In the **Category/Subcategory** field, type the name of your category, and then click **Save**.

### **Add a Subcategory to a Category**

1. Open the **Category Subcategory Tree** window.
2. Drag the **Drag New Category/Subcategory** icon over an existing category (a yellow arrow appears when you are over a category)  
  
(If you drag the Drag New Category/Subcategory icon over a subcategory you create a subsubcategory.)
3. In the **Category/Subcategory** field, type the name of your subcategory, and then click **Save**.

## **Units of Measure**

All inventory items must be assigned a standard unit of measure. An item's standard unit of measure is the smallest unit of measure the item is stored in. The most common unit of measure is each, but a unit of measure can be box, pallet, case, bag, inch and so on.

You can also specify an item's purchase and sales unit of measure. To do this you need to define how many standard units of measure for an item

equals its sales or purchase unit of measure. In other words you need to define the relationship between an item's standard unit of measure and its sales or purchase unit of measure.

## Create a Unit of Measure

1. Open the **Setup** menu, click **Units of Measure**, and then click **UM Setup**.
2. In the **Enter UM** text box, type the name of your unit of measure, and then click **Save**.

## Define a Relation Between Units of Measures

1. Open the **Units of Measure** window, and then click **New**.
2. In the **Item** list, select your item.

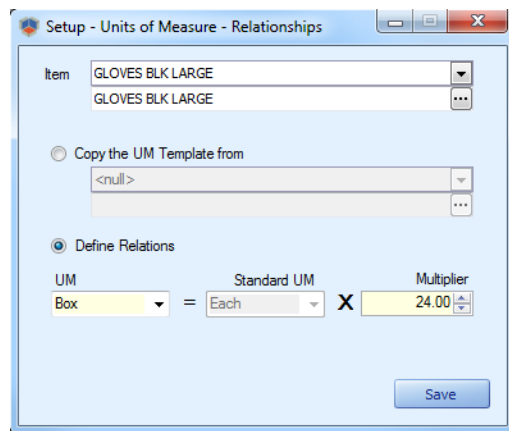


Figure 4: Defining a relation between units of measures.

3. Do one of the following steps:
  - To copy an existing unit of measure relation, select the **Copy the UM Template from** option. In the list below the option, select the unit of measure relation you want to copy.
  - To define a new unit of measure relation, select the **Define Relations** options. In the **UM** list, select a unit of measure. In the **Multiplier** box, type how many of your item's standard unit of measure equals the unit of measure you chose in the **UM** list.
4. Click **Save**.


## Taxes

A tax schedule is a group of tax codes you assign to either a customer or vendor. Each time you sell or purchase an item SIMMS tracks the taxes you need to collect from your customer or pay your vendor.

There are two prerequisites to creating your tax schedules:

- You need to enter in the Vendor Manager the tax agencies that are owed taxes. A tax agency must be assigned the client type Tax Agency.
- You need to create your tax codes.

### Create a Tax Code

1. Open the **Setup Menu**, click the **Tax Details** tab, and then click the **Ellipsis** , adjacent to the **Tax** list.
2. Enter the appropriate information in the grid.  
See “Table 1: Tax Codes for more information”.

**Table 1:**

Field	Action
<b>Code</b>	Type your tax code.
<b>Tax Percent</b>	Type your tax code’s percentage.
<b>Description</b>	Type a description of your tax code.
<b>Tax Account</b>	If you are using SIMMS General Ledger, in the field’s list, select the account the taxes are posted to.
<b>Client</b>	In the field’s list, select the tax agency owed the taxes you collect.  A tax agency is the government agency you remit the taxes you collect. To appear in this, list the tax agency must be entered in the Vendor Manager and assigned the client type Tax Agency.

## Create a Tax Schedule

1. If not already open, Open the **Taxes** window, on the **Schedule** tab, in the **Schedule Code** text box, type your tax schedule's code.
2. In the **Description** text box, type a description for your tax schedule.
3. Click **Insert**.

## Add Tax Details to Your Tax Schedule

1. Click the **Tax Details** tab, and then in the **Tax** list, select the tax code you want to add to your tax schedule.

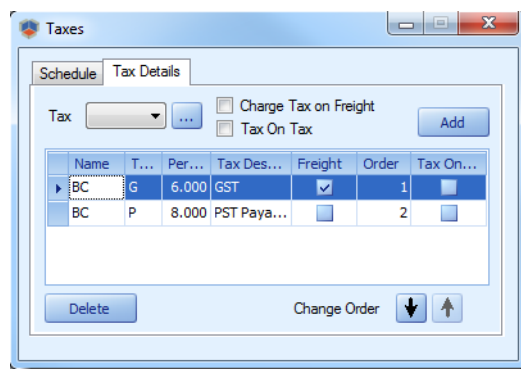


Figure 5: Add tax details to your tax schedule.

2. If this tax code is applied to freight charges, click the **Charge Tax on Freight** check box.
3. If this tax code is applied to other taxes, click the **Tax on Tax** check box.
4. Click **Add**.

Taxes are applied to an item in the order they appear in your tax schedule. This is significant if your tax schedule includes a tax that is applied to an already taxed item (a tax on tax). Use the arrows at the bottom of the window to reorder the taxes.

## Departments

A department's name is an additional piece of information you can add to a transaction or contact's profile.

### Create a Department

1. Open the **Setup** menu, and then click **Departments**.
2. In the **Enter Department** text box, type the name of the department, and then click **Save**.

## Shipping Methods

You can record in SIMMS your shipping methods, such as FedEx, UPS and so on. This information includes the shipping company's contact details and your account number with the shipping company.

### Add a Shipping Method

1. Open the **Setup** Menu, click **Shipping Methods**.
2. In the **Method** text box, type the name of a shipping carrier (such as FedEx, UPS, Canada Post).
3. In the **Account** text box, type your account number.
4. In the appropriate text boxes, type the contact details for the carrier, and then click **Insert**.

### Edit a Shipping Method

1. Open the **Shipping Method** window, in the bottom pane select the shipping method you want to edit.
2. Edit your shipping method, and then click **Edit**.

## Stock-Keeping Units (SKU)

**Caution:** *Once you have assigned SKU to your items, you cannot return to use item codes.*

A stock-keeping unit (SKU) is a code used to identify a unique item. In SIMMS you can configure and automatically generate SKU codes for your inventory items.

For example, an SKU could consist of three parts: two characters for the manufacturer's name, three characters for the category name, and two characters for an incremented number. If for this example, the manufacturer is Smith and the category is Computers, the SKU would be SMCOM01.

Note if you are using any of the following elements as part of your SKU code:

- Category (including any of the three subcategory levels)
- Manufacturer
- Manufacturer's SKU
- Vendor
- Vendor Part Number

all your inventory items must have a category/subcategory, manufacturer, manufacturer SKU, vendor, or vendor's part number assigned to them in the Item Manager.

For example, if one element of your SKU is Manufacturer, all your items must have a manufacturer assigned to them in the Item Manager.

**Note:** One of your SKU elements must be an incremented number. This ensures all your SKU are unique.

## Define Your SKU Formula

1. Open the **Setup** menu, click **SKU Configurator**.
2. Click the **Use Automatic SKU** check box.
3. Under **Element**, in the **Part 1** list, select the first part of your SKU.
4. Under **Calculation Method**, choose one of the following options:
  - **Automatic Generated #**  
SIMMS automatically generates a number for your element.
  - **Alphanumeric**  
SIMMS generates an alphanumeric code based on your chosen element.  
For example, if you chose Category for your element; three for the number of alphanumeric characters; and if Computer is your item's category, this SKU element would be COM (the first three letters of the category Computer).
  - **Alphanumeric + Extra Chars**  
SIMMS generates an alphanumeric code based on your chosen element and appends a number to the code. For example, if Category is your element; four for the number of alphanumeric characters; two for the number of extra characters that are appended to your element; then for an item whose category is Software the SKU element would be SOFT01. (The first four letters of software with two numeric characters appended to it).
5. Under **No. of Characters**, type the number of characters you want for your element.
6. If you selected **Alphanumeric + Extra Chars.**, under **Extra Characters**, type the number of characters you want appended to your element.

7. Repeat this process for other parts (elements) of your SKU formula.
8. Click **Save**.

## Branches

You can create multiple branches for one company, all of them using the same database. With branch management you can do the following:

- Assign users to specific branches of your company. Users can only log in to the branches assigned to them.
- Share contact information between branches.
- Generate branch specific reports.

You create your main branch first, and then create your subsidiary branches. Each branch you create must have both users and locations assigned to it.

### Add Your Main Branch

1. Open the **Setup** Menu, and then click **Branch Management**.
2. In the **Code** text box, type the code for your main branch.
3. In the **Description** text box, type a description for your main branch.
4. In the **Address** text box, type the address of your main branch.
5. Click **Next**.

### Add a Branch

You overwrite other information.

1. In the **Code** text box, type the code for your branch.

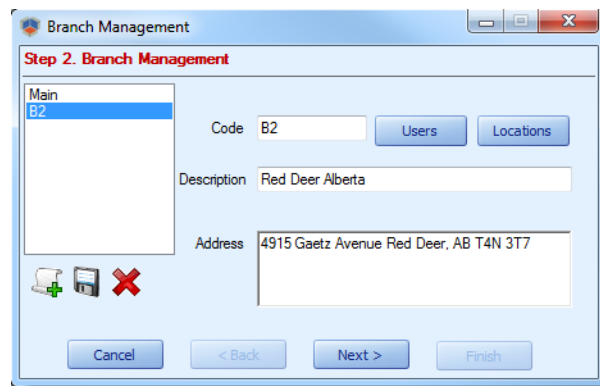


Figure 6: Add a branch.

2. In the **Description** text box, type a description for your branch.
3. In the **Address** text box, type the address of your main branch.
4. Click the **New** icon.

### **Assign Users to a Branch**

1. In the **Branch Management** window, click **Users**.
2. Under **Unassigned Users**, select the user you want to assign to this location, and then click the **Arrow** link.

### **Add Locations to a Branch**

1. In the **Branch Management** window, click **Locations**.
2. In the **Warehouse code** text box, type a warehouse code.  
Your warehouse code can be up to three characters long.
3. In the **Bin Code** text box, type a bin code.  
Your bin code can be up to ten characters long.
4. (Optional) Click the **Use Capacity** check box, and then do one of the following steps:
  - **Click Use Volume Units.** In the adjacent box, type the capacity (volume) of the bin.  
For example, if you enter 10 as the
  - **Use Pallets.**  
With this option selected you can store only one pallet in your location.
5. In the **Description** text, type a description to help better identify the location.
6. Click **Save**.

## **Multi-Currency**

You can manage multi-currency transactions in SIMMS. This means you can purchase and sell items in a currency other than your default currency. You can also process your payments and receipts in a currency other than your default currency.

### **Specify Your Default Currency**

1. Open the **Setup** menu, and then click **Currency Manager**.
2. In the **Default Currency Code** text box, type the abbreviation for your currency. (USD, CAD, AUD, EUR).

## Add a Foreign Currency

1. Open the **Setup** menu, and then click **Currency Manager**.
2. Click **New**.
3. Enter the appropriate information in the grid, and then click **Save**.

See “Table 2: Foreign Currency Details” for more information.

**Table 2: Foreign Currency Details**

<b>Code</b>	In this field, type the currency's code.
<b>Description</b>	In this field, type a description for the currency.
<b>Selling Parity</b>	In this field, type the sell rate for the currency.
<b>Buying Parity</b>	In this field, type the buy rate for the currency.