# SIMMS Online

## Installing SIMMS Online

With SIMMS Online your customer's and employee's can view your inventory and create sales orders online.

### Prerequisites

To install SIMMS Online you need the following:

- IIS
- .NET 4.0 Framework
- SIMMS 8.0.8 or higher
- SIMMS Online installer

You need to configure your IIS server and enable asp.net v4.0.

### Install SIMMS Online

1. Open the SIMMS Online installer and follow the instructions on the installation wizard.
2. Open the web.config file. Under `<connectionStrings>` edit the database connection string.

   The connection string has the following format:

   ```
   <add name="SIMMSWEB" connectionString="Data
   Source=MYSERVER\SQLSIMMS;Initial Cata-
   log=SI_ABC;Application Name=Simms;Pool-
   ing=true;persist security info=False;packet
   size=4096;User ID=user;Pwd=password"/>
   ```

   You will need to edit the following details: **name** (This is your PIN. You use this PIN to log in to SIMMS Online.); **Data Source** (The location of your SQL Server.); **Initial Catalog** (The name of your company database.); **User ID**; **Pwd**. (The user ID and password needed to log in to your SQL server.)

   If you use multiple SIMMS databases, you can add additional connection strings.

## Web Accounts Settings

Both customers and SIMMS' users need a web account to sign in to SIMMS Online. Note, employee's use their SIMMS user name and password to log in to SIMMS Online.

## Set Web Accounts for Employee's

1. Open the **Administration** menu, and then click **User Manager**.
2. Select a user, and then click the **Edit** icon.
3. On the **Web Account Settings** tab, click the **Enable Web Login** check box.
4. To allow the user to view a list of inventory items, click the **View Inventory Check** box, and then choose one of the following options:
   - **All Items**
     This is the default setting. It allows users to view items in all locations.
   - **Items in User's Location**
5. To allow the user to create sales orders, click the **Create Sales Order check** box.
6. Click the **Save** icon.

## Set Web Accounts for Customers

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. On the **Web Account Settings** tab, click the **Enable Web Login** check box.
4. In the appropriate text boxes, type the customer's user name and password.
5. To allow the customer to view a list of inventory items, click the **View Inventory Check** box, and then choose one of the following options:
   - **All Items**
     This is the default setting. It allows the customer to view items in all locations.
   - **Items in User's Location**
6. To allow the customer to create sales orders, click the **Create Sales Order** check box.
7. Click the **Save** icon.

# Sales Orders

You can create a sales order online and view existing sales orders.

## Create a Sales Order

1. Log in to SIMMS Online. Click **New Sales Order**.
2. In the **Customer** list, select a customer.
3. In the **Contact** list, select a contact.
4. In the **Due Date** box, select the date you require the items on the sales order.
5. In the **Doc No.** text box, type a document number.
6. In the **Comment** box, type a comment.
7. In the **Ship To** list, select the address you want the items on the sales order shipped to.
8. Click the **New** link.
9. In the **Item Code** list, select an item, and then click **Check Stock**.
10. In the list of stock items that appears, click the **Select** link adjacent to the item you want to add to your sales order.
11. Click **Update**.
12. Click **Save Sales Order**.

## View Existing Sales Orders

1. Log in to SIMMS Online. Click **Sales Orders**.
2. Click the **Magnify Glass** icon adjacent to the sales order whose details you want to view.

## Add a Shipping Address

Before you save a sales order you can add a alternate shipping address for the customer on the open sales order. This address is saved in SIMMS' Address Manager for your customer. You can retrieve this address online or in SIMMS.

1. In an open sales order, click the **Shipping Address**.
2. Type your customer's address and contact information in the available boxes, and then click **Save New Address**.

# Inventory

You can view a list of your company's inventory You can export that list as a PDF or XLS file.

## View Inventory

- On the SIMMS Online home page, click **Show Inventory**.

## Export Inventory List as a PDF

1. On the SIMMS Online home page, click **Show Inventory**.
2. Click **Export to PDF**.

## Export Inventory list as an XLS File.

You will need a version of Microsoft Excel that supports XLS files.

1. On the SIMMS Online home page, click **Show Inventory**.
2. Click **Export to XLS**.