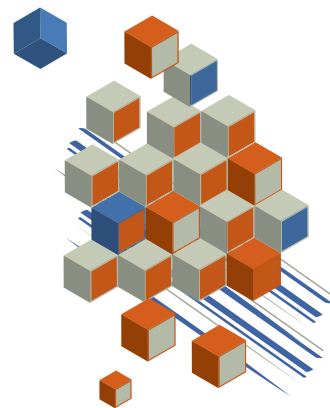




# **SIMMS Online**

**SIMMS** Inventory Management Software 2012

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# SIMMS Online

SIMMS Online is a web application in which you can perform many of the same tasks you currently perform in SIMMS. With SIMMS Online your customer's and employee's can view a list of your inventory items and create sales orders online.

In addition, you can create your transfers online. This is useful if you need to create a transfer off-site, away from your computer.

A unique type of transfer is between a storage facility and an employee. Typically, this type of transfer is used to distribute tools and equipment to your employees. They would normally return the tools or equipment to the storage facility after use. For this type of transfer, use SIMMS' Tool/Equipment Crib to easily track where your equipment is and who has it.

SIMMS Online is directly connected to your company database. This means that what you do in SIMMS Online immediately effects your database. It is just like working in SIMMS on your workstation.

## Installing SIMMS 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. This file is located at **Program Files > Kornyk Computer Solution International > SIMMS Online**.
3. Under **<connectionStrings>** edit the database connection string.

The connection string has the following format:

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

You will need to edit the following details in the Web.config file:

- **name**  
This is your PIN. You enter this PIN to log in to SIMMS Online.
- **Data Source**  
This is the location of your SQL Server.
- **Initial Catalog**  
This is the name of your company database.
- **User ID**  
This is the username used to log in to your SQL server.
- **Pwd**  
This is the password used 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 employees 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 Employees

1. Open the **Administration** menu, and then click **User Manager**.
2. Select an employee, and then click the **Edit** icon.
3. On the **Web Account Settings** tab, click the **Enable Web Login** check box.
4. To allow the employee 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 an employee to view items in all locations.
  - **Items in User's Location**

This option allows the employee to view only the inventory assigned to their location. Note the user is still able to view all items from all locations when creating a sales order.

5. To allow the employee 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**  
This option allows the customer to view only the inventory items assigned to their location. Note the customer is still able to view all items from all locations when creating a sales order.
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 and view existing sales orders online. Customer's can only view their own sales orders and do not have access other customer's names or addresses.

### Create a Sales Order

1. Log in to **SIMMS Online**. Click **Sales Orders**.
2. Click the **New Sales Orders** link.
3. In the **Customer** list, select a customer.

4. In the **Contact** list, select a contact.
5. In the **Due Date** box, select the date you require the items on the sales order.
6. In the **Doc No.** text box, type a document number.
7. In the **Comment** box, type a comment.
8. In the **Ship To** list, select the address you want the items on the sales order shipped to.
9. Click the **New** link.
10. In the **Item Code** list, select an item, and then click **Check Stock**.
11. In the list of stock items that appears, click the **Select** link adjacent to the item you want to add to your sales order.
12. Click the **Update** link.
13. 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**

You can add a customer's alternate shipping address on an open (not saved) sales order. This address is saved in the customer's Address Manager which is part of SIMMS. 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 also 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**.

## **Item Transfers**

You can transfer items from one location to another. You can also link a transfer to a specific project and stage in the Project Manager.

### **Create a Transfer**

1. On the **SIMMS Online** home page, click **Item Transfer**.
2. Click the **New Item Transfer** link.
3. In the **Transaction Date** box, select the date of your transfer.
4. In the **Document No** text box, type a document number.
5. In the **Initial Location** list, select the location you want to transfer your item from.
6. In the **Final Location** list, select the location you want to transfer your item to.
7. In the **Comment** box, type a comment.
8. If you want to link your transfer to a kit project, in the **Project list**, select your kit project. In the **Stage** list, select your project's stage.
9. Click the **New** link.
10. In the **Item Code** list, select an item, and then click **Check Stock**.
11. In the list of stock items that appears, click the **Select** link adjacent to the item you want to add to your transfer.
12. Click the **Update** link.
13. Click **Save Transfer**.

## **Tool Crib**

Use SIMMS' Tool/Equipment Crib to record equipment transfers between a storage location and an employee. By doing so, you are able to track where your equipment is and in whose possession it is in.



You set up your tool crib by designating specific locations as a tool crib. In addition, you assign an employee to a location. This location should be unique to the employee, that is there should be one employee to one location.

### **Designate a Location as a Tool Crib**

1. Open the **Setup** menu, click **Locations**.
2. If not already created, create a location that you want to use as a tool crib, and then click the **Tool Crib Location** check box.

### **Assign a Location to an Employee**

1. Open the **Administration** menu, and then click **User Manager**.
2. Select an employee, and then click the **Edit** icon.
3. Click the **Equipment/Tool Crib** tab, and then in the **Checkout Location** list, select a location.
4. Click **Save**.

### **Mask an Employee's Password**

For security reasons, an employee's password can be masked. This means their password appears as a series of asterisks, one for each character of their password. By doing this no other person can see their password.

1. Open the **Setup** menu, and click **Global Settings**.
2. On the **Equipment/Tool Crib** tab, click the **Mask Employee ID** check box, and then click **Save**.

### **Check In or Out Equipment**

Note: You can scan in the following information: employee's ID, UPC, item code, or serial number. If you scan an item's serial number, SIMMS automatically enters the item's remaining details.






1. On the **SIMMS Online** home page, click **Item Transfer**, and then click the **Equipment/Tool Crib** link.
2. In the **Tool Crib** location list, select a tool crib.
3. In the **Employee** list, select an employee.
4. In the **Item Code** list, select an item.
5. In the **Serial Number** text box, enter your item's serial number.
6. Click **Add**.

7. Do one of the following steps:
- To check an item in, click **Check In**
  - To Check an item out, click **Check Out**.

## SIMMS Online and Your Mobile Device

You can use SIMMS Online with your mobile device. Currently you can view a list of your inventory items and create a transfer with your mobile device.

**Table 1: Home Page Icons**

Icon	Action
	Click to view a list of your inventory items.
	Click to create a sales order. (Currently not available).
	Click to log out of SIMMS Online.
	Click to create a transfer.
	Click to edit your SIMMS Online settings for a mobile device.

### Log In to SIMMS Online with Your Mobile Device

1. Open your web browser for your mobile device, and then open **SIMMS Online**.
2. Log in, by entering your PIN, user name, and password.

3. Click Log In.



Figure 1: SIMMS Online home page for your mobile device.

### Settings for SIMMS Online

1. On the **SIMMS Online** home page, click the **Settings** icon.
2. Under **Item Transfer Fields**, click to select any of the available check boxes, and then click **Save**.

### View Inventory Items

1. On the **SIMMS Online** home page, click the **Inventory** icon. SIMMS list your inventory items alphabetically by item description.
2. To navigate to other pages, at the bottom of the window click the page number you want to view.

### Create a Transfer

1. On the **SIMMS Online** home page, click the **Transfer** icon.
2. In the available text boxes enter the details of your transfer. You can either scan or type in your item's UPC, item code, or serial number.