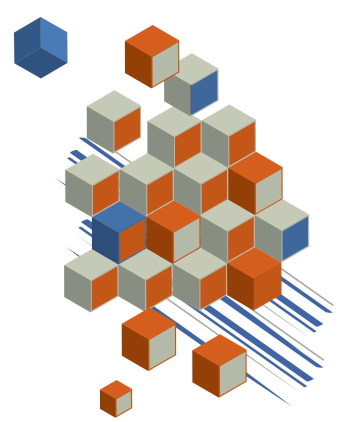
SIMMS

Item Management

SIMMS Inventory Management Software 2012

October 20, 2011



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Item Management

Adding an Item's Profile

Items can exist within SIMMS with very few details, but every item must have the following four details:

- **Item Code**
  This is a unique reference code for your item. You cannot duplicate an item code. Your item code can be up to 30 characters long.
- **Item Description**
  This is a short description of your item. For example, bicycle, hammer, or chair. Your item description can be up to 60 characters long.

  To require that your item descriptions be unique, go to **Setup** > **Global Settings** > the **Item & Stock** tab, and then click the **Use Item Description Unique** check box.
- **Category**
  This is a meaningful classification of your inventory. Your category name can be up to 50 characters long.
- **Standard Unit of Measure**
  This is the smallest unit of measure for which an item is used in a transaction.

  An item's standard unit of measure is its default unit of measure. The cost or price you assign to an item is the cost or price for each standard unit of measure of the item.

Add an Item's Basic Profile Details

1. Open the **Warehouse** menu, open the **Inventory** submenu, and then click **Item Manager**.
2. Click the **New** icon .
3. In the **Type** list, select one of the following types:
   - **Stock Item**
     Use this type for items you stock and use regularly in transactions.

     Stock items are included in quantity and valuation reports.
   - **Misc. Item**

Use this type for items that you do not stock, but may bring in as a special order, or items used for in-house activities, such as office supplies, tools, and equipment.

Miscellaneous items are not included in item quantity and valuation reports.

- **Misc. Charge**
  Use this type for charges you apply to customers, such as inspection, waste, or handling charges.

  You can add these charges to your transactions just as you would an item.

4. On the **Primary Info** tab, in the **Description** text box, type the item's description.

   By default, SIMMS sorts your items in the Stock Window and other item lists alphabetically by their description.

5. In the **Item Code** text box, type the item's code.
6. If you are using universal price codes (UPC), in the **UPC Code** text box, type the item's UPC.
7. In the **Default Category** list, select the item's default category.
8. In the **Standard UM** list, select the item's standard unit of measure.
9. Click the **Advanced** tab. In the **Default Location** list, select the item's default location.

Enter Last/Preferred Vendor Details

1. In the **Item Manager** window, click the **Primary Info** tab.
2. In the **Last/Pref. Vendor** list, select the item's last/preferred vendor.
3. In the **Pref. Vendor Part #** text box, type the item's vendor part number (VPN).

   The VPN must be unique.

By default, SIMMS updates your last/preferred vendor with the vendor from which you last purchased the item.

To prevent SIMMS from updating your last/preferred vendor, go to **Setup** > **Global Settings** > the **Purchase** tab, and then click the **Last/ Pref. Vendor Static** check box.

Enter Manufacturer Details

1. In the **Item Manager** window, click the **Primary Info** tab.

2. In the **Manufacturer** list, select the item’s manufacturer.
3. In the **Mfg. Part #** text box, type the manufacturer’s part number.
4. In the **Mfg. SKU** text box, type the manufacturer's SKU.
5. In the **Country of Origin** list, select the country the item was manufactured in.

Change an Item’s Tax Status

By default, SIMMS assigns the tax status *Fully Taxable* to all items.

1. In the **Item Manager** window, click the **Advanced** tab.
2. In the **Taxable** list, select one of the following:
   - **Fully Taxable**
   - **Partially Taxable**
     A prompt appears asking if you would like to assign the tax exemptions for your item. Click **Yes**. The Items Tax Exemptions window opens. Under **Tax Schedules**, click your tax schedule. Under **Tax Codes**, click the check boxes to select the taxes that you want to apply to your item.
   - **Non-Taxable**
3. Click **Save**.

Assign General Ledger Accounts to an Item

If your using SIMMS’ general ledger, assign to your item’s a sales account, inventory account, and cost of sales account.

1. In the **Item Manger** window, click the **Advanced** tab.

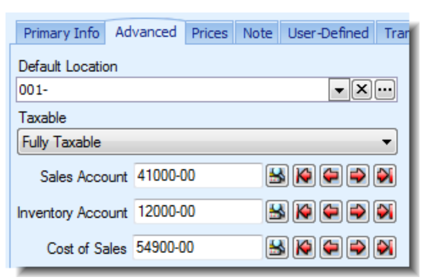

Figure 1: General ledger accounts for inventory items.

2. To the right of **Sales Account**, click the magnify icon.
3. Click the appropriate sales account, and then click **OK**.
4. To the right of **Inventory Account**, click the magnify icon.

5. Click the appropriate inventory account, and then click **OK**.
6. To the right of **Cost of Sales**, click the magnify icon.
7. Click the appropriate cost of sales account, and then click **OK**.

Assign an Item to a Category/Subcategory

In addition to assigning your item to a default category (required), you can assign the same item to other categories and to subcategories.

1. In the **Item Manager** window, click the **Advanced** tab.
2. Under **Category/Subcategory** click the **Ellipsis** icon.
3. In the **Select** column, click the check box beside the category/subcategory you want to add your item to.
4. Click **Save**.

Enter an Item's Physical Measurements

1. In the **Item Manager** window, click the **Advanced** tab.

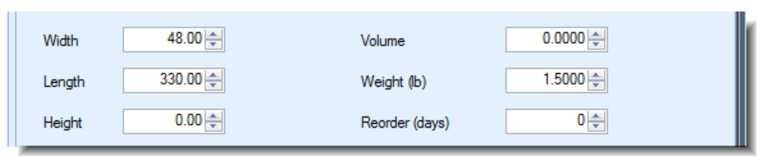

Figure 2: An item's measurements.

2. In the appropriate boxes, type your item's physical measurements (width, length, height, volume, weight).

Enter an Item's Default Warranties

1. In the **Item Manager** window, click the **Advanced** tab.
2. In the **Default Warranty on Receiving** box, type the number of months an item's warranty lasts after receiving the item.
3. In the **Default Warranty on Issuing**, type the number of months an item's warranty lasts after issuing the item.

Enter the Lead Time Needed to Receive an Item

1. In the **Item Manager** window, click the **Advanced** tab.
2. In the **Reorder (day)** box, type the number of days it takes to receive an item after you place an order for it.

Specify an Item's Default Purchase Unit of Measure

When specified, SIMMS uses the purchase unit of measure for purchase transactions (not your standard unit of measure).

1. In the **Item Manager** window, click the **Advanced** tab.
2. In the **Default Purchase UM** list, select the unit of measure your item is purchased in.

Specify an Item's Default Sales Unit of Measure

When specified, SIMMS uses your sales unit of measure for sale transactions (not your standard unit of measure).

1. In the **Item Manager** window, click the **Advance** tab.
2. In the **Default Sales UM** list, select the unit of measure your item is sold in.

Expiration Dates

To use expiration dates for an item you need to enable the feature in the Item Manager. You assign an expiration date to an item when you receive the item into inventory.

SIMMS can alert you when an item comes close to its expiration date.

To receive alerts for items close to their expiration dates, go to **Setup** > **Global Settings** > the **General** tab. In the **Expiration Date - advance warning of** box, type the number of days before an item expires you wish to be alerted.

There are two reports related to expiration dates. To view these reports go to **Reporting** > **Report Center** > **Inventory** > **Expiration Dates**.

Table 1: Expiration Dates Reports

Reports	Description
Expired Item List	This report list items that are past their expiration date.
Expiration Report	This report lists items with expiration dates.

Enable Expiration Dates

You enable this option for each item you want to assign expiration dates to. For items with this option enabled, you must assign an expiration date to the item when you receive it into inventory.

- In the **Item Manager** window, click the **Advanced** tab, and then click **Use Expiration Dates**.

Enable Serial Numbers

You enable this option for each item you want to assign serial numbers to. For items with this option enabled, you can assign them serial numbers when you create your purchase orders, receipt of goods, sales orders invoices and transfers.

- In the **Item Manager**, click the **Advanced** tab, and then click the **Use Serial Numbers** check box.

Enter an Item's Standard Cost

The standard cost of an item is what you pay for that item.

1. In the **Item Manager** window, click the **Prices** tab.
2. In the **Cost** box, type your item's cost.

To have SIMMS automatically update the cost of an item with the cost you last paid for it go to **Setup** > **Global Settings** > **Purchasing** tab. Click **Update when "Last Cost" is changing**, and then click **Save**.

Enter an Item's Standard Price

An item's standard price is its normal selling price without additional markups or discounts applied.

1. In the **Item Manager** window, click the **Prices** tab.
2. In the **Price** box, type the item's price.

Enter an Item's Repair Cost

An item's repair cost is used for service and returns and appears in the Fix and Destroy window. It is the cost of the item after it is repaired.

1. In the **Item Manager** window, click the **Prices** tab.
2. In the **Repair Cost** box, type the repair cost for your item.

View a Snapshot of the Sales and Inventory for an Item

1. In the **Item Manager** window, select an item, and then click the **Prices** tab.
2. Click the **Snapshot** icon .

   A concise summary of the item's sales and inventory information displays.

Upload a Document for an Item

If your item has a document associated to it (such as data sheets, manuals, or specifications) you can upload these documents to SIMMS. You can then easily access them from the Item Manager.

1. In the **Item Manager** window, click the **Documents** tab, and then click **New Document**.

   The Attach Documents dialogue box opens.

2. Click **Browse**.

   The Find File window opens.

3. Locate and select your file. Click **Open**.
4. In the **Attach Documents** window, click **Attach**.

   Your document is added to the list box.

5. Click **Upload**, and then click **Close**.

   Your document is listed in the Documents grid on the Documents tab.

Upload a Picture for an Item

1. In the **Item Manager** window, select an item.
2. On the **Tools** menu, click **Pictures**.
3. In the **Picture Name** text box, type the name of your picture.
4. Click the **New** icon .
5. Locate and select your picture. Click **Open**.

   Your picture is uploaded into SIMMS.

6. Click the **Save** icon , and then click **Close**.

To have an item's image print on your sales reports, go to **Setup** > **Global Settings** > and then click **Include item images in sales transaction reports**.

You can upload as many images as you need for an item, but only the last image you upload appears on your printouts.

Your images should be 4cm x 4cm in size (1.5" x 1.5").

Define an Item's Alias

Your customer or vendor may use a different name for an item than you do. You can record this name (alias). And then use its alias instead of your item's default name for transaction printouts.

1. In the **Item Manager** window, select an item.
2. On the **Tools** menu, and then click **Item Alias**.
3. In the **Item Alias** text box, type the item's alias.
4. Do one or both of the following steps:

- If it is a vendor that uses this alias, in the **Vendor** list, select the vendor.
- If it is a customer that uses this alias, in the **Customer** list, select the customer.

5. Click **Save**.

Assign a Vendor for Repair

When you create an RTVOUT, by default the vendor you return your item to is the vendor you purchased your item from. However, you may want to send your item to another vendor to repair it. To do this you need to assign that vendor as a vendor for repair. By doing so your assigned vendor is available to choose during the RTVOUT process.

1. In the **Item Manager**, on the **Tools** menu, click **Vendor for Repair**.

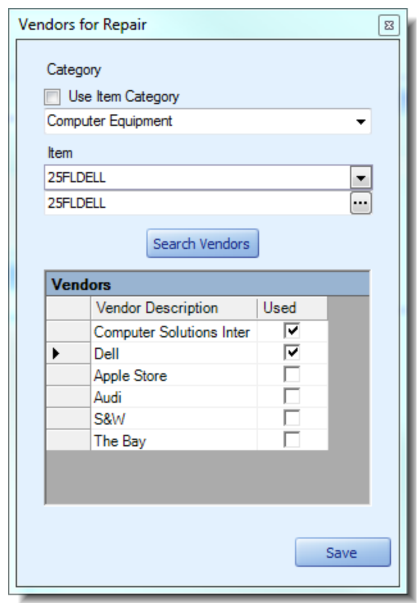

Figure 3: Vendors for repair.

2. You can assign a vendor for repair to an entire category of items, or to a single item.

   Do one of the following steps:

   - To assign a vendor for repair to an entire category, click the **Use Item Category** check box, and then select a category from the **Category** list.
   - To assign a vendor for repair to a single item, in the **Category** list select a category, and then in the **Item** list select an item.

3. Click **Search Vendors**.

4. In the **Used** column, click the check box beside the vendor that you want to repair your item.

   You can select more than one vendor.

5. Click **Save**.

Assign a Vendor Part Number

You can assign a vendor part number to an item. When you purchase the item from the vendor, their part number appears on your transaction printouts.

1. In the **Item Manager**, select an item.
2. On the **Tools** menu, click **Vendor Part Numbers**.
3. In the **Vendor Part Number** text box, type the item's vendor part number.
4. In the **Vendor** list, select the item's vendor.
5. In the **Cost** box, type what the vendor charges for this item.

   This cost replaces the standard cost on purchase orders and receipt of goods.

6. In the **Cost Additional Currency** list, select the currency with which you purchase this item.
7. Click **Add**.

Vendor Part Numbers and Global Settings

There are two global setting related to vendor part numbers:

- Use VPN cost when available and warn if no VPN for selected item
- Only show VPN items when purchasing

You can find these global settings at **Setup** > **Global Settings** > **Purchasing** tab.

Record an Item's Hazardous Material Information

An item's hazardous material information appears on the Bill of Lading.

1. In the **Item Manager**, on the **Tools** menu, click **Hazardous Items**.

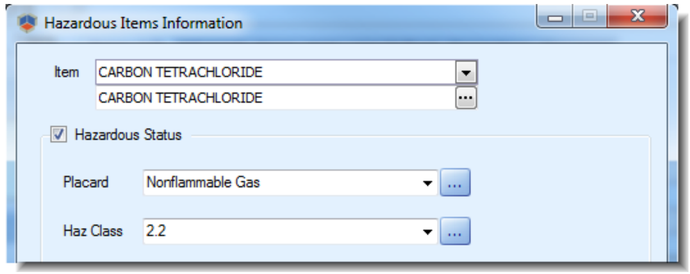

Figure 4: Hazardous item's information.

2. In the **Item** list, select your item.
3. Click the **Hazardous Status** check box.
4. In the **Placard** list, select the item's placard description.
   - To add a new placard description to the list, click the **Ellipsis** button . The Hazardous Place Card dialogue box opens. In the **Enter Data** text box, type the placard's description. Click **Save**.

     Common examples of placard descriptions are poisonous material, flammable liquid, biohazard, poison.
5. In the **Hazclass** list, select the item's hazardous class.
   - To add a new hazardous class to the list, click the **Ellipsis** button . The Hazardous Class dialogue box opens. In the **Enter Data** text box, type the hazardous class number. Click **Save**.
6. In the **Hazardous Items Information** window click **Save**.

Add an Extended Description

You can add a detailed description of your item to its profile.

1. In the **Item Manager** window, select an item.
2. On the **Edit** menu, click **Extended Description**.
3. Type your description in the text box, and then click **Save**.

   Your extended description can be up to 1000 characters long.

To have your extended description print on your transactions, go to **Setup** > **Global Settings** > **Reporting** tab. Under **Additional Fields**, click **Include Extended Descriptions**, and then click **Save**.

Edit an Item's Profile

You cannot edit an item's profile until you click the Edit icon on the toolbar. This helps to prevent accidental changes to an item's profile.

1. Open the **Item Manager**, in the category list, select a category. Select an item, and then click the **Edit** icon.
2. Make the required changes to the item's profile, and then click the **Save** icon.

User-Defined Fields

User-defined fields are fields such as drop-down lists, text boxes, and date fields that you can customize. Customize these fields so you can record those item details unique to your company's needs.

For example, you could customize a drop-down list by naming it Color and then specifying its values: Red, Orange, Yellow, Green, Blue. Each item would then have a drop down list named Color with the values Red, Orange, Yellow, Green, Blue. You could then select an item's color from the drop-down list.

User-defined fields are located in three areas of the Item Manager.

On the User-Defined tab, you find these fields:

- 2 drop-down lists.
- 3 text boxes.

At Tools > Assigned User-Defined Fields, you find these fields:

- 15 drop-down lists.
- 11 text boxes.
- 5 date fields.

At Edit > Extended Description, you find these fields (when enabled):

- 8 drop-down lists.
- 2 text boxes.

Customize User-Defined Fields (User-Defined tab)

1. Open the **Setup** menu. Click **User Defined** fields.
2. On the **General** tab, in the appropriate text box, type the name of your field, and then click **Save**.

   Next, in the Item Manager, you need to enter the values for your drop-down lists.
3. Open the **Item Manager**. Select any category and then select any item. Click the **Edit** icon.

   There are two drop-down menu's available to you, User-Defined drop-down 1 and User-Defined drop-down 2.

4. Click the **Ellipsis** icon to the right of the drop-down list you want to add values for.
5. In the text box, type a value for your list, and then click **Save**.

   Repeat this step to add more values to your list.

Customize User-Defined Fields (Assigned User-Defined Fields)

1. Open the **Item Manager**, click **Tools**, and then click **Assigned User-Defined Fields**.

   Begin by entering the names of your fields.
2. Click **Update Labels**.
3. In a fields text box, type the name of the field. Click **Update** and then click **Close**.

   Next add values to your drop-down lists.
4. Click the **Ellipsis** icon to the right of the drop-down list you want to add values for.
5. In the text box, type a value for your list, and then click **Save**.

   Repeat this step to add more values to your list.

Customize User-Defined Fields (Extended Description)

You can replace extended descriptions with user-defined fields. The values for your fields appear on your printed transactions.

1. Open the **Setup** Menu. Click **User-Defined Fields**.
2. Click the **Customizable** tab, and then click the **Item Extended Description Concatenated Fields** option.
3. In the appropriate text box, type the name for the fields you want to use.

   Only Drop-down Field 1-8 and Text Field 1 and 2 are used for this feature.
4. To assign values to your drop-down lists, click the appropriate link.
5. In the **Enter Data** text box, type a value for your list. Click **Save**.

   Repeat this step to add more values to your list, and then close the window.
6. Click **Save**.

Unique Features

Unique features are descriptive details, such as a color, size, material, that you can assign to an item. As such they are similar to user-defined fields. And like user-defined fields you can customize these details.

You can do the following tasks with unique features:

- Assign unique features to items when you receive them into inventory (that is when you create your receipt of goods).
- View an item's unique features from the Stock Window.
- Search for an item based on its unique features and then view those unique features. You do this from the Item Manager.

Enable Unique Features for an Item

1. Open the **Item Manager**.
2. In the **Category** list, select your item's category, select the item, and then click the **Edit** icon .
3. Click the **Advanced** tab, and then click **Use Unique Features** (bottom).

Customize the User-Defined Fields

You have 22 user-defined field you can customize. However, only the first four drop-down lists appear in the Unique Item lookup window. This means that you can only search for an item using the values for drop-down field 1-4.

1. Open the **Setup** menu. **Click User-Defined Fields**.
2. Click the **Customizable** tab, and then click the **Extra Unique-Stock Fields** option.
3. In the appropriate text box, type the name for the fields you want to use.
4. To assign values to your drop-down lists or multiple selection boxes, click the link to the left of the field.
5. In the **Enter Data** text box, type a value for your list or multiple selection box. Click **Save**.

   Repeat this step to add more values, and then close the window.
6. In the **User-Defined Fields** window, click **Save**.

Assign Unique Features to an Item

You assign an item's unique features when you receive the item into inventory. To assign unique features to an item you also need to assign a lot number to the item.

1. Open the **Receipt** window. Create your receipt of goods as you normally would.
2. Enter a lot number for any of the items you want to assign unique features to.
3. After you added all your item's to your receipt, click **Save**.

   The Unique Item Lookup window opens.

   Listed in the window are all the items on your receipt that have a lot number and use unique features.
4. Select an item's row, and then click **Details**.

   The Unique Features window opens.
5. Select your item's unique features and then click **Update**.

View Unique Features from the Stock Window

- List your item in the **Stock** window. Select the item's row and then click **Unique Features**.

Search for Items Assigned Unique Features

1. Open the **Item Manager**. On the **Tools** menu, click **Unique Item Lookup**.
2. Use any of the available search parameters to narrow your search results, and then click **Find**.
3. To view an item's unique features, select the item's row, and then click **Details**.