SIMMS

Managing User Profiles

SIMMS Inventory Management Software 2012

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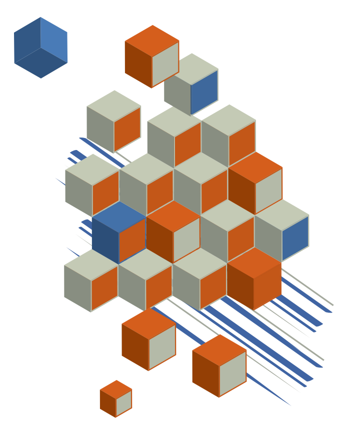

Contents

Managing User Profiles

A user's profile requires at least the following information:

- User name
- Password
- Last name
- First name

Optionally, you can include such details as their address, role, picture, and so on.

By default, a new user has access to all of SIMMS features and reports. However, you are able to limit a user's rights to specific features and reports.

This document covers a sales agents profile. This includes how to create commission templates and generate a list of commissions for sales agents.

Adding a User Profiles

Add a User's Basic Information

User name, Password, Re-enter Password, Last Name, First Name are required fields. If you want to send a user e-mail alerts, you need to enter their e-mail address. as part of their profile.

1. Open the **Administration** menu, click **User Manager**, and then click the **New** icon .
2. On the **Username Information** tab, type the appropriate information in the text boxes.

Job Roles

The tasks an employee performs, their job role, may have special significance within SIMMS: for instance, a production employee.

You can assign the job role *Production Employee* to a user. The benefit is that you are then able to assign that employee to a specific task, book time for that task, and track the associated labor costs.

There are six predefined job roles in SIMMS.

Define a User’s Job Role

- In the **User Manager**, click the **Details** tab. Select and enter the appropriate details for the user’s job role.

  See “Table 1: Job Roles” for more information.

Table 1: Job Roles

Label	Action
Production Employee	Select this check box to include a production employee in the **Employee** list. In the **Standard Labor Rate** box, type the employee’s rate of pay. In the **SSN/TFN** box, type the employee’s SSN, SIN, or TFN. The Employee list is available when you book time for kit builds, projects, and automotive repairs. From this list, you select the employee you want to assign a task to and book time for. SIMMS uses the rate of pay you enter for a production employee to calculate the labor costs associated to performing a task.
Sales Manager	Select this check box to include a sales manager in the **Manager** list. The Manager list is available in the User Manager, on the Details tab. You select a sales agent’s sales manager from this list. In the box to the right of the list, you enter the percentage of an agent’s commission that their manager receives. Sales managers can generate a Gross Margin by Sales Agent report for the sales agents they supervise. Sales managers can also override a customer’s credit limit.

Table 1: Job Roles

Label	Action
Shipping Duties	Select this check box to include the user in the **Shipped by** list. The Shipped by list is available in the Shipping Details window. Use this list to record who shipped an item.
Service /Repairs Technician	Select this check box to include a technician in the **Technicians** list. The Technicians list is available in the Fix and Destroy window and in the RMA - Testing and Comments window. Use this list to record who serviced an item.
Sales/Purchasing Agent	Select this check box to include sales and purchasing agents in the Agent list. The Agent list is available on your transaction window's such as the Sales window, or Receipt window. Use this list to record the sales or purchasing agent associated to a transaction.
Sales Administrator	Select this check box to allow a user to generate a Gross Margin by Sales Agent report for all sales agents.

User's Rights

User rights determine what a user can do and see within SIMMS. You can grant or deny these rights. For example, you can prevent a user from processing payments by denying them access to the Accounts Payable Manager.

User rights are organized in a hierarchy. At the top of that hierarchy are modules, such as Accounts Payable, Kits, and Service/Returns. If you grant access rights to a module, by default, the user has full access to all of the module's features. However, you are able to change this and limit the user's rights to just some of the module's features.

Many features have options below them on the hierarchy. To grant access to these options the user must have full access to the feature.

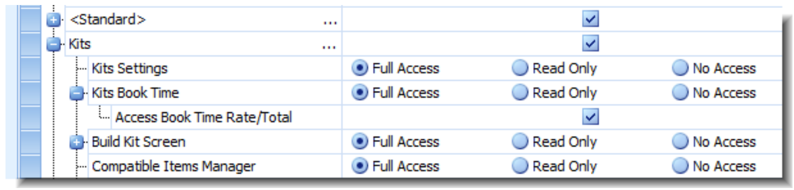

Figure 1: User rights.

Note: *By default, a new user has full access to all modules and reports within SIMMS.*

Deny or Grant User Rights

1. In the **User Manager**, click the **User Rights** tab.
2. Do one of the following steps:
   - To grant full rights to a module, in the **Access Rights** column, click the check box to the right of the module.
   - To deny all rights to a module, in the **Access Rights** column, clear the check box to the right of the module.
3. If a user has full rights to a module, you can limit their rights to just some of a module's features. Click the plus sign (+) to expand the module's tree view. To limit a user's rights to a feature, choose one of the following options:
   - **Read Only**
   - **No Access**
4. Some features have additional options associated with them. Only if a user has full access to a feature can you grant rights to a feature's options. Click the plus sign (+) to expand the feature's tree view. Do one of the following steps:
   - To grant rights to an option, click the option's check box.
   - To deny rights to an option, clear the option's check box.

Add a User's Picture

1. In the **User Manager**, click the **Signature and Picture** tab.
2. Click the **Edit** link below the **User Picture** box.
3. In the **Select an Image** window, click the **Ellipsis** button ....

4. Find and select your image, and then click **Open**.
5. Return to the **Select an Image** window, and click **Select**.

Add a User's Signature

1. In the **User Manager**, click the **Signature and Picture** tab.
2. Click the **Edit** link, below the **User Signature** box.
3. In the **Select an Image** window, click the **Ellipsis** button.
4. Find and select your image, and then click **Open**.
5. Return to the **Select an Image** window, and click **Select**.

Edit a User's Profile

To edit a user's profile after it is saved, you must enable the edit mode for the profile.

1. Open the **User Manager**, select a user, and then click the **Edit** icon.
2. Edit the user's profile, and then click the **Save** icon.

Delete a User's Profile

You cannot delete a user's profile if the user has been included in a transaction. This is because SIMMS maintains a historical record of all transactions, and therefore requires the user's information.

- Open the **User Manager**, select a user, and then click the **Delete** icon.

Sales Agents

Define a Sales Agent's Profile

1. In the **User Manager**, click the **Details** tab.
2. Click the **Sales/Purchasing Agent** check box.

3. In the **Commission** list, select the commission template for the sales agent.

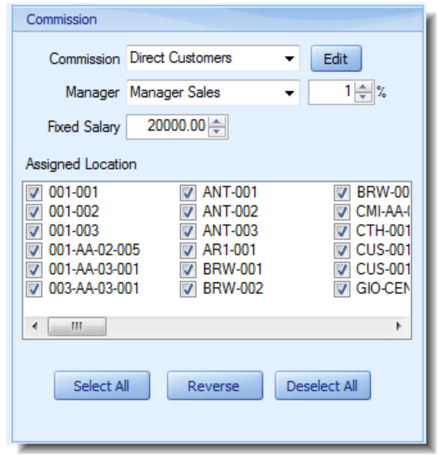

Figure 2: Features related to a sales agent's profile.

4. In the **Manager** list, select the sales agent's manager.
5. If the manager receives a percentage of the sales agents commission, in the box adjacent to the **Manager** list, type the percentage.
6. In the **Fixed Salary** box, type the sales agent's salary.
7. In the **Assigned Location** box, click the check box for the locations the sales agent can sell inventory from.

Commissions

To receive commissions, a sales agent must have a commission template assigned to them and be assigned to a transaction. Commission templates determine how commissions are calculated. There are three types of commission templates:

- **Maximum Value**
  Commissions are based on the dollar value of an invoice.
- **Items-Categories**
  Commissions are based on the item sold.
- **Customers**
  Commissions are based on the customer sold to.

SIMMS can calculate your commissions automatically, or you can calculate them manually. Either way, after commissions are calculated you print the Commission Report. This report lists commissions due your sales agents.

Create a Commission Template (Maximum Value)

Use this template to base your commissions on the total dollar value of an invoice.

1. Open the **Sales** menu, open the **Sales Commissions** submenu, and then click **Commission Template Manager**.
2. Click **New**, and then in the **Description** text box, type the name of your commission template.
3. On the **Maximum Value** tab, in the **Beginning With** column, type the beginning dollar value for this level of commissions.
4. In the **Percentage (%)** column, type the percentage of commission received for selling equal to or above the **Beginning With** value.

Create a Commission Template (Item-Categories)

Use this template to base your commissions on the item sold.

1. Open the **Sales** menu, open the **Sales Commissions** submenu, and then click **Commission Template Manager**.
2. Click **New**, and then in the **Description** text box, type the name of your commission template.
3. On the **Items-Categories** tab, select a category, and then in the list that appears, choose an item.
4. Click the **Down Arrow** to move the item to the lower box.

   A dialog appears.
5. In the **Percentage (%)** box, type the percentage of commission received for selling the item, and then click **OK**.

Create a Commission Template (Customers)

Use this template to base your commissions on the customer sold to.

1. Open the **Sales** menu, open the **Sales Commissions** submenu, and then click **Commission Template Manager**.
2. Click **New**, and then in the **Description** text box, type the name of your commission template.
3. On the **Customers** tab, select a customer, and then click the **Down Arrow** to move the customer to the lower box.

   A dialog appears.
4. In the **Percentage (%)** box, type the percentage of commission received for selling to this customer, and then click **OK**.

Commissions and Global Settings

There are options in Global Settings related to commissions.

See “Table: 2 Commission Settings” for more information.

Table 2: Commission Settings

Options	Action
Accounts Receivable	Select this option to base your commissions on only paid or partially paid invoices.
Transactions	Select this option to base your commissions on all invoices whether paid or not.
Calculate Manually	Select this option if you want to calculate your commissions manually. Under **Choose frequency of alerts**, enter how often you want SIMMS to alert you to calculate commissions.
Calculate Automatically	Select this option if you want SIMMS to calculate your commissions automatically. Under **Automatic calculation will occur every**, enter how often you want SIMMS to calculate commissions.
Deduct from % from Estore sales	In the **Deduct** box, enter the percentage of e-store sales you want deducted from a sales agent’s commission.
Return Records	Select this option to remove commissions on returns.
RMAIN Records	Select this option to remove commissions on an RMAIN.

Table 2: Commission Settings

Options	Action
RMAOUT Records	Select this option to restore commissions on an RMAOUT. The RMAOUT can be for the same, refurbished, or new item.
Manual Credit Records	Select this option to remove commissions when you issue a manual credit memo (negative invoice).
ZERO Invoice Records	Select this option to include invoices with zero amount totals in the Commission Report.

The Commission Report

The Commission Report lists the commissions for your sales agents. If your commissions are calculated automatically all you need to do is generate the report. However, if your commissions are calculated manually, you need to first calculate your commissions and then generate the report.

The Commission Manager

From the Commission Manager you manually calculate your commissions and generate the Commission Report. The options available on the Commission Manager depend on how you have chosen to calculate your commissions, on accounts receivables or on transactions. See "Table 3: The Commissions Manager" for more information.

Table 3: The Commission Manager

Feature	Action
Last Calculation Time	This date shows the day and time commissions were last calculated.

Table 3: The Commission Manager

Feature	Action
Calculate	Click this button to calculate commissions. This button is dimmed if SIMMS calculates your commissions automatically. To have SIMMS calculate your commissions automatically, go to **Setup** > **Global Settings** > **Commissions tab** > and click **Calculate Automatically**.
Delete All Calculations and Recalculate	Click this button to delete all previous commission calculations and recalculate commissions.
Delete Last Calculations and Recalculate	Click this button to delete the last commission calculations and recalculate commissions.
By Salesman	Select this check box if you want to calculate commissions for just one sales agent. In the list adjacent to the **By Salesman** check box, select the sales agents name.

Table 3: The Commission Manager

Feature	Action
Calculation Date Filter	Select this option to show commissions for a chosen date range. Use the **Initial** and **Final** date box, to specify your date range. If your date range overlaps with the dates of previous commission calculations, the Commission Report will include the results of those previous calculations. This means that it is likely that the Commission Report will include commissions from AR documents/invoices that are older than your chosen date range. This is because these AR documents/ invoices were included in previous commission calculation. And you have included the results of those previous calculations in your Commission Report. Use the date stamp on the Commission Manager to guide you in choosing a date range.
AR Date Filter	Select this option to calculate your commissions on AR documents with dates that fall between your chosen date range. Use the **Initial** and **Final** date box, to specify your date range.
Invoice Date Filter	Select this option to calculate your commissions on invoices with a transaction date that falls between your chosen date range. Use the **Initial** and **Final** date box, to specify your date range.
Show Commissions	Select this check box to show the sum of all commissions for a sales agent. This includes previous commissions.

Table 3: The Commission Manager

Feature	Action
Show AR Documents	Select this check box to list all the AR documents that your commissions are based on. The AR date, AR number, customer name, AR total, and commission owed for the AR document show.
Show Invoices (Available when the Show AR Documents check box is selected)	Select this check box to show the invoice number your AR documents are based on.
Print Invoices (Available when the Show AR Documents check box is selected)	Select this check box to open in the Report window the invoices your AR documents are based on. You can then review and print these invoices.
Show Invoices (This is a different option then the Show Invoices above. It is only available when you base your commission calculations on transactions).	Select this check box to list the invoices your commission calculations are based on. The invoice date, invoice number, customer name, invoice total, and commission owed for the invoice show.

Automatically Calculate Commissions

To have SIMMS automatically calculate your commissions, the option must be enabled in Global Settings. Generate the Commission Report to view the results of your commission calculations.

1. Open the **Setup** menu, and then click **Global Settings**.
2. On the **Commission** tab, click **Calculate Automatically**.
3. Under **Automatic calculation will occur every**, enter how often you want SIMMS to calculate commissions.
4. Click **Save**.

Manually Calculate Commissions

To manually calculate your commissions, the option must be enabled in Global Settings. Generate the Commission Report to view the results of your commission calculations.

1. Open the **Sales** menu, open the **Sales Commissions** sub-menu, and then click **Commission Manager**.
2. Do one of the following steps:
   - Click **Calculate**.

     SIMMS calculates your commissions from the last time you calculated your commissions up to the present the present date and time.
   - Click **Delete All Calculations and Recalculate**.

     SIMMS recalculates all your commissions up to the present date and time.
   - Click **Delete Last Calculation and Recalculate**.

     SIMMS recalculates your previous commission calculations and includes the results with your present commission calculations.

Generate a Commission Report

1. Open the **Sales** menu, open the **Sales Commissions** sub-menu, and then click **Commission Manager**.
2. To show the commission results for just a single sales agent, click the **By Salesman** check box, and then in the adjacent list select the sales agents name.
3. Do one of the following steps:
   - To show the commissions for a specific date range, click the **Calculation Date Filter** option. In the **Initial** and **Final** date boxes specify the date range.

     If your date range overlaps with the dates of previous commission calculations, the results of those calculations are included in the commission report.
   - To show the commissions for only the invoices that fall between a specific date range, click the **Invoice Date Filter** option. In the **Initial** and **Final** date boxes specify the date range.
4. Click **Generate**.

Adjust a Sales Agent's Commissions

You can manually adjust a sales agent's commissions .

1. Open the **Commission Manager**, and then click **Adjust**.
2. In the top pane, select the sales agent whose commissions you want to adjust.
3. Select the AR document/invoice for which you want to adjust the commissions.
4. In the **Commission** box, type the new commission amount.
5. Click **Save**, and then click the **Recalculate** link.

Split a Sales Agent's Commission

You can split a sales agent's commission with another sales agent.

1. Open the **Commission Manager**, and then click **Adjust**.
2. In the top pane, select the sales agent whose commissions you want to adjust.
3. Select the AR document/invoice for which you want to split the commissions.
4. In the **Second Agent With** list, select a sales agent.
5. In the **Percentage Amount** box, type the percentage the second sales agent receives from the commission. Click **Save**.
6. Click **Save**, and then click the **Recalculate** link.