SIMMS Server Agent

SIMMS Inventory Management Software 2012

July 18, 2011

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SIMMS Server Agent

The SIMMS Server Agent (SSA) is installed with SIMMS. Its primary purpose is to alert you of important events related to managing your business. For example, the SSA can send you an alert when an accounts receivable becomes overdue. Use the SSA to do the following tasks:

- To send users the Gross Margin Report by Sales Agent.
- To alert users of a particular event. There are 14 predefined alerts within the SSA.
- To send users an e-mail when the status of a purchase order changes. This option is used together with SIMMS' purchase order authorization feature.

A workstation (a computer that connects to the server which hosts SIMMS) does not automatically have access to the SSA. This is because the SSA is installed and runs on the same computer as SIMMS not on workstations.

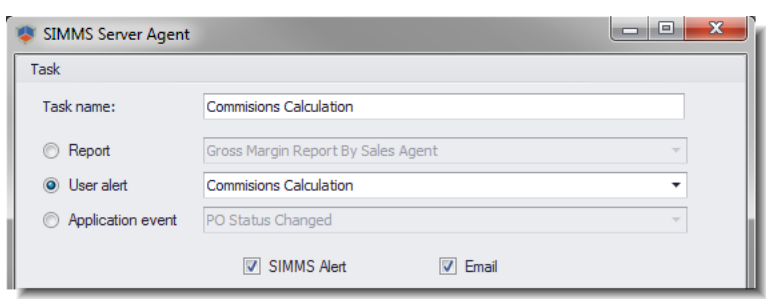
For a workstation to access the SSA, your system administrator must link the workstation to the SSA.

Adding a Task to the SSA

The first steps in adding a task to the SSA is to name your task and choose the action you want it to perform. After that you schedule how often you want the SSA to perform the task.

Add a Task to the SSA

1. Start the **SIMMS Server Agent**.
2. Click **Add**.
3. In the **Username** text box, type **admin**. In the **Password** text box, type **admin**, and then click **Login**.
4. In the **Task name** text box, type a task name.



5. Choose one of the following options:
   - **Report**
     With this option you can send the Gross Margin Report by Sales Agent to an e-mail account. This report includes such details as what items a sales agent has sold and the gross margin for each of those items.

     SIMMS also sends you an alert notifying you that the Gross Margin Report has been sent to you.
   - **User alert**
     With this option you can send users one of 14 alerts. From the list adjacent to the **User alert** option, select the alert you want to send.

     See *Table 1: User Alerts* for a description of each alert.
   - **Application event**
     With this option you can select the users you want to notify by e-mail that the status of a purchase order has changed. This option works together with SIMMS purchase order authorization feature.
6. If you chose the option **User alert**, do one or both of the following steps:
   - To receive your alerts in the **SIMMS Software Alerts** window (that is directly in SIMMS), click the **SIMMS Alert** check box.
   - To receive your alert by e-mail, click the **Email** check box.

     For a user to receive an e-mail alert, they must have an e-mail address entered as part of their profile in the User Manager.

   ***Note**: If you chose either the Report option or the Application event option, SIMMS automatically sends both an alert and e-mail to your selected users.*
7. Click the **Ellipsis** button (adjacent to the Recipient(s) box). Click the check box beside the users you want to receive the report, alert or application event notice.
8. If you are sending e-mails to users, in the **Subject** text box, type a subject for your e-mail. In the **Body** text box, type the message that appears in the body of your e-mail.

Table 1: User Alerts

Alert	Description
Stock - Expiration Date	This alert appears when a stock item reaches its advance warning date. The purpose of this alert is to notify you when an item is close to its expiration date. You set an item's advance warning date in Global Settings.
Reorder List	This alert appears when a stock item reaches its reorder point. You set an item's reorder point in the Item Manager.
Expired Quotes	This alert appears when a quote is past its expiration date. The date in which you want your quotes to expire is set in Global Settings.
Sales Order Expired	This alert appears when a sales order is past its expiration date. The date in which you want your sales orders to expire is set in Global Settings.
Purchase Order Expired	This alert appears when the item's on a purchase order are not received into inventory and the purchase order is past its required date.
Accounts Receivable Overdue	This alert appears when a customer's invoice is not paid and it is past its due date.
Accounts Payable Overdue and Discounts	This alert appears when a vendor's invoice is not paid and it is past its due date.

Table 1: User Alerts

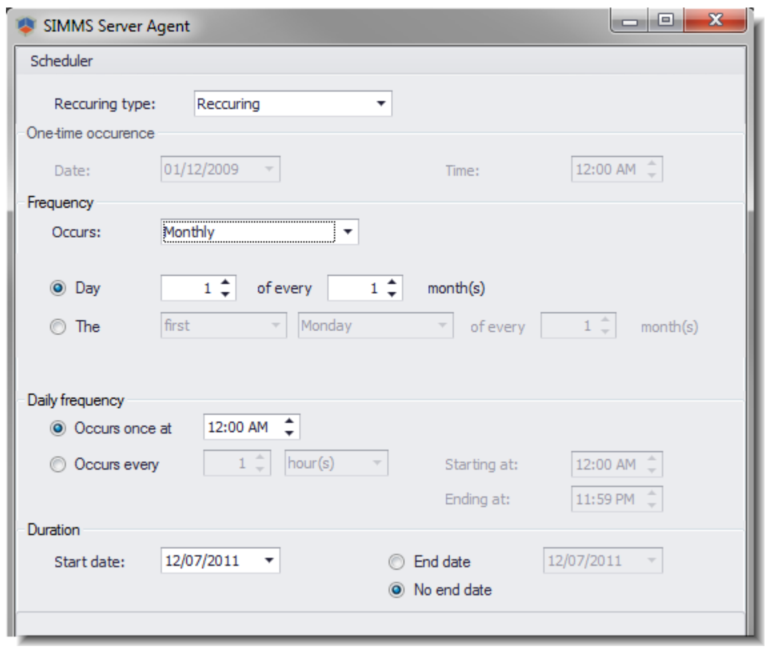
Alert	Description
Un-Shipped Orders	This alert appears when there are unshipped orders listed in the Shipping Manager.
Un-Received Orders or Transfers	This alert appears when there are receipts or transfers not confirmed received.
Commission Calculation	This alert appears when you need to manually calculate the commission for your sales agents.
Back Ordered Items	This alert appears if a stock item is back ordered.
Uncommitted Transactions	This alert appears if a transaction (sales order invoice, purchase order or receipt of goods) is in draft mode (uncommitted). To commit a transaction you need to save it. This changes the transaction from a draft document to a committed document. You need to commit a transaction before you can process it further. For example, if a sales order is in draft mode (uncommitted) you cannot import that sales order into an invoice.
Price Alerts	This alert appears when the price of an item fluctuates either higher or lower than its predefined range. You set this allowable range of fluctuation in Global Settings.
Cost Alerts	This alert appears when the cost of an item fluctuates either higher or lower than its predefined range. You set this allowable range of fluctuation in Global Settings.

Schedule a Task

After you select a task's action and it's recipients, you schedule how often you want your task performed.

***Note**: You cannot schedule a purchase order's status change (application event). This is because, by default, SIMMS notifies users that a purchase order's status has changed at the time of the change. For example, when you save a purchase order, SIMMS immediately notifies users that a purchase order is submitted.*

1. At the bottom of the **SIMMS Server Agent** dialogue box, click **Schedular**.



2. Do one of the following group of steps:

   - To have your task done repeatedly, in the **Recurring type** list, select **Recurring**.

     Configure the available options to set how often and how long you want your alerts sent.

   - To have your task done only once, in the **Recurring type** list, select **One time**.

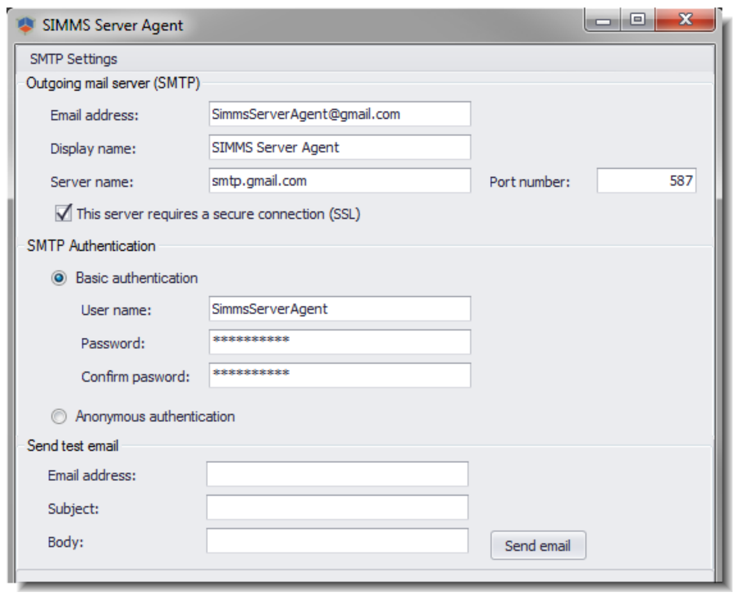
     Configure the available options to set the date and time you want your alert sent.

3. Click **Save**.

Configure Your E-Mail Settings

For the SSA to send e-mail messages over the internet, you need to enter your mail server's Simple Mail Transfer Protocol (SMTP) settings. Typically, you have the person who manages your computer network to enter or supply you with your SMTP settings.

1. Start and log in to the **SIMMS Server Agent**.
2. Click **Email** settings.
3. In the appropriate fields enter your SMTP settings.



Test Your E-Mail Settings

After you have entered your SMTP settings, you can test to confirm that you are able to receive e-mails.

1. In the **SMTP Settings** pane, under **Send test email**, in the **Email address** text box, type your e-mail address.
2. In the **Subject** text box, type the subject of your e-mail.
3. In the **Body** text box, type the message that appears in the body of your e-mail.
4. Click **Send Mail**.
5. Retrieve the e-mail you sent to confirm your SMTP settings are correct and that your are receiving e-mails sent by the SSA.

Viewing Your Alerts in SIMMS

You can view your alerts directly in SIMMS. This incudes SIMMS standard alerts available in the SSA and those related to purchase order authorization available in Global Settings. If your are automatically receiving by e-mail the Gross Margin Report by Sales Agent, SIMMS also alerts you that the report has been sent to you.

View Your Alerts

- On SIMMS' main page, click the **Alerts** icon.

  SIMMS Software Alerts window opens.

Working with the SIMMS Server Agent Window

You can close the SSA window by either clicking the Close or Minimize button. Clicking the Close button does not exit the SSA, the SSA continues to run in the background.

The following procedures are written for Windows 7.

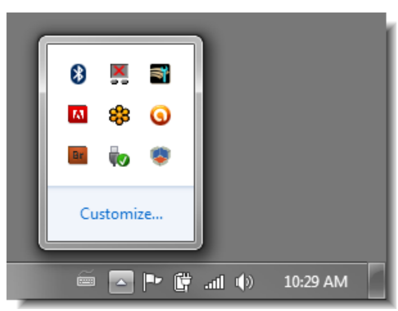
Re-Open the SIMMS Server Agent Window

1. On your computer's desktop, click the triangle on the taskbar.
2. In the window that appears, right-click the **SIMMS logo**, and then click **Open Application**.

Note: *The SIMMS logo may appear on the taskbar itself. This depends on how you have configured your icons to appear in the notification area of the taskbar.*

Exit the SIMMS Server Agent

1. On your computer's desktop, click the triangle on the Taskbar.
2. In the window that appears, right-click the **SIMMS logo,** and then click **Exit**.



Note: *The SIMMS logo may appear on the taskbar itself. This depends on how you have configured your icons to appear in the notification area of the taskbar.*