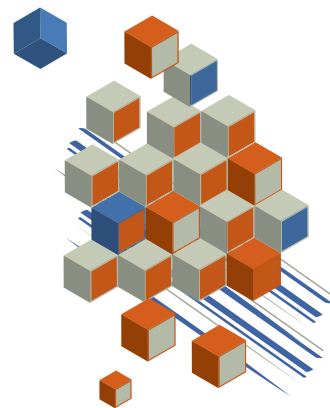




Visual Import Manager

SIMMS Inventory Management Software 2012

August 12, 2011



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Visual Import Manager

The Visual Import Manager (a separate application from SIMMS) enables you to import data into your SIMMS database.

Typically, you use the Visual Import Manager to import data into a new database. For example, if you have an existing comma-separated file with the name and addresses of your customers, you can import that information into SIMMS. This dramatically reduces the time and effort required to manually enter this data into SIMMS.

You can also import data into your existing database. This is helpful if you have a lot of information you want to add to your database such as more stock items, customer addresses, and so on.

You can export data from SIMMS, edit that data, and then use the Visual Import Manager to bring the data back into SIMMS. For example, if you wanted to update the price of all your stock items, you could export that data, edit it in Microsoft Excel and then import it back into SIMMS with the Visual Import Manager.



Caution: *To avoid the loss of data or damaging your database, it is recommended that you receive training from KCSI on the proper use of the Visual Import Manager. KCSI is not responsible for the loss of data or damage to your database as a result of the improper use of the Visual Import Manager.*

About Importing Data

You can import a variety of data into your SIMMS database. This includes sales order, customer, vendor, and stock item details.

The order in which you import your data into SIMMS is important. For example, you cannot import your sales order details until you have imported your stock item and customer details. This is because the table that contains your sales order details pulls some of its information from the tables that contain your item and customer details.

You should import the following data first: customer, vendor and item.

See *Table 1: SIMMS Tables* for an explanation of what data you can import and to which SIMMS table the data is imported to.

Although you can import data from a Microsoft Access file (.mdb), or Microsoft Excel file (.xls or .xlsx), it is recommended that you import only text files or comma-separated value files. If your original file is a Microsoft Access file, you can export it as one of the recommended file types and then import that file into SIMMS. If your original file is a

Microsoft Excel file, you can save it as one of the recommended file types and then import that file into SIMMS.

Table 1: SIMMS Tables

Table	Explanation
<p>SalesOrders</p>	<p>This table contains your sales order information. Details included are your customer's name, address, the item code, unit of measure and quantity for the items on a sales order.</p> <p>Prerequisite: <i>Before you can import your sales orders, all customers and items referred to in the source document must already exist in SIMMS.</i></p>
<p>Stock</p>	<p>This table contains your stock item's information. Details included are an item's code, location, on-hand quantity, and lot number.</p> <p>Prerequisite: <i>Before you can import an item's stock quantity, the item referred to in the source document must already exist in SIMMS.</i></p>
<p>Customers</p>	<p>This table contains your customer information. Details included in the table are your customer's name, address, and phone number.</p>
<p>Vendors</p>	<p>This table contains your vendor's information. Details included are your vendor's name, address and phone number.</p>

Table 1: SIMMS Tables

Table	Explanation
<p>CustomerShipTo</p>	<p>This table contains alternate ship-to and bill-to addresses for your customers and vendors.</p> <p>In the Description field (under SIMMS-Fields) you map your customer's or vendor's name. It is under this name the address appears in the Address Manager.</p> <p>Prerequisite: <i>Before you can import alternate bill-to and ship-to addresses for a customer or vendor, the customer or vendor referred to in the source document must already exist in SIMMS.</i></p>
<p>Locations</p>	<p>This table contains the names of your locations</p>
<p>Quotes</p>	<p>This table contains the information for your quotes. Details included are your customer's name, the item code, unit of measure, and quantity for the items on a quote.</p> <p>Prerequisite: <i>Before you can import your quotes, all customers and items referred to in the source document must already exist in SIMMS.</i></p>
<p>PurchaseOrders</p>	<p>This table contains your purchase order information. Details included are your vendor's name, address, the item code, unit of measure, and quantity for the items on a purchase order.</p> <p>Prerequisite: <i>Before you can import your purchase orders, all vendors and items referred to in the source document must already exist in SIMMS.</i></p>
<p>Matrix</p>	<p>This table contains your apparel matrix information. This includes the color, size, and style details for your apparel matrix.</p>

Table 1: SIMMS Tables

Table	Explanation
<p>ItemMatrix</p>	<p>This table contains information about an item's matrix style.</p> <p>Prerequisite: <i>Before you can import an item's matrix style, the items referred to in the source document must already exist in SIMMS.</i></p>
<p>VendorPartNo</p>	<p>This table contains information about your vendor part numbers. Details included are your item's code, vendor and vendor part number.</p> <p>Prerequisite: <i>Before you can import your item's vendor part number, the items and vendors referred to in the source document must already exist in SIMMS.</i></p>
<p>KitSchema</p>	<p>This table contains information about your kit schemes (BOM). Details included are your kit's item code, and component items.</p> <p>Prerequisite: <i>Before you can import your kit's schema, the kit and its component items must already exist in SIMMS.</i></p>
<p>Items</p>	<p>This table contains information about your stock items. Details included are an item's code, description, category, unit of measure, price and cost.</p>
<p>SerialNumbers</p>	<p>This table contains information about your serial numbers. Details included are an item's code, serial number, and user serial number.</p> <p>Prerequisite: <i>Before you can import an item's serial number, the item's code referred to in the source document must already exist in SIMMS. In addition, the item must have the Use Serial Number check box selected. This check box is located at Item Manager > Advance tab.</i></p>

Table 1: SIMMS Tables

Table	Explanation
VendorCatalog	This table contains information about a vendor's catalog. Details included are an item's code, description, category and the vendor's name.
ItemAlias	This table contains a stock item's alias. Details included are your item's code, alias, and the vendor or customer that uses the alias. <i>Prerequisite: Before you can import a stock item's alias, the item, customer or vendor referred to in the source document must already exist in SIMMS.</i>
Country	This table contains the country names and codes you use in SIMMS.
Transfer	This table contains information about your transfers. Details included are an item's code, initial location and final location. <i>Prerequisite: Before you can import your transfers, the item referred to in the source document must already exist in SIMMS.</i>
ZipCodes	This table contains zip code information. Details included are the zip code, city, state code, and country code.

About the Fields that Make Up a Table

Each field that makes up a table has its own set of parameters. The fields you import from your source file must match the parameters of its destination field.

For example, the Items table includes a field called Items_Code. Some of its parameters include that the field cannot be empty and that it is unique. This means that every item you import into the Items table must have an item code and that code must be unique.

The parameters that define a field appear in its row.

See *Table 2: Field Parameters* for an explanation of some of the parameters in a fields row.

Table 2: Field Parameters

Updateable	<p>This field determines if the data in the field can be changed. Yes means you can change the data. No means you cannot change the data.</p> <p>This is not important if you are importing information into an empty table. However, if you are importing information into a table that has information in it already you may not be able to change some of table's data.</p> <p>To change the data in an updateable field, you need to select the Update check box for its row.</p>
Length	<p>This field determines how many characters you can enter in the field.</p>
Unique	<p>This field determines if the data in the field must be unique. Yes means the field must be unique. No means the field does not need to be unique.</p> <p>For example, in the Items table the field Item Description must be unique. This means no items can have the same description.</p>
Nullable	<p>This field determines if you must have data in the field. No indicates the field requires data. That is it cannot be empty. Yes indicates the field does not require data.</p>

Importing Data

Use the Visual Import Manager to import data into your company's database. To import data into your company's database you need to select the file whose data you want to import and then connect to your server hosting your company's database. After which you map your source data to your company's database.

Select Your Source File and Connect to your Server

1. On the **Start** menu, click **All Programs**, click the **SIMMS Inventory Management** folder, and then click **Visual Import Manager**.

The View Templates window opens.

Files that you have imported data from before appear in the **View Template** window. You can import from the same file again.

2. Do one of the following steps:
 - To import data from a file that appears in the **View Template** window, Select the file and then click **OK**. Click **Continue**. The Visual Import Manager opens.
 - If you no files appear in the in the **View Template** window or you do not want to import data from any of the files that do appear, click **Cancel**. Continue with the next step.
3. In the **Please select a file type** list, select the type of file you are importing from.

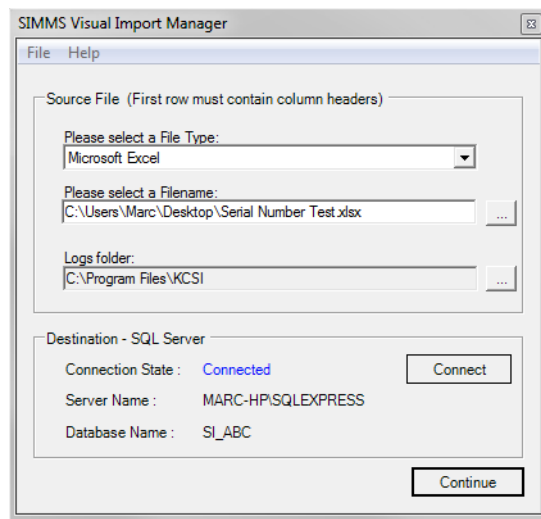




Figure 1: Selecting a source file.

4. Adjacent to the **Please select a file name** box, click the **Ellipsis**  button. Locate your file and then click **Open**.
5. Click **Connect**.

The SQL Server Connection window opens.
6. In the **Server Name** list, select the server you want to connect to.

If your server does not appear in the list, click the **Ellipsis**  button to have SIMMS update the list of servers.

7. In the **Login Name** box, type your login name.
8. In the **Password** text box, type your password.
9. Click **Connect**, and then in the **Database Name** list, select the database you are importing data to.
10. Click **OK**.
11. Click **Continue**.

Map Your Source Data to a SIMMS' Table

1. In the **Source Tables** list, select the table you want to import data from.
2. In the **SIMMS Table** list, select the table you want to import data to.
3. Under **Source Table Fields**, click the field whose data you want to import.

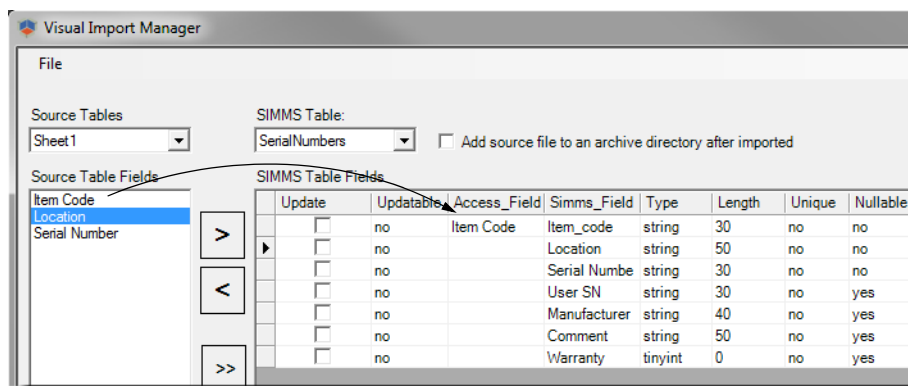



Figure 2: Mapping your source data to a SIMMS table.

4. Under **SIMMS Table Fields**, click in the **Access_Field** for your destination field (the field you are importing information to). and then click the **Arrow** .
5. Repeat this process to import data from other fields from your source table.
6. After you have mapped all your source fields to their destination fields, click **Import**.

Exporting Data

You can export data from SIMMS, edit that data in Excel, and then import the data back into SIMMS. This is useful if you have large amounts of data you need to edit.

Export Data

1. Open the **Reporting** menu, and then click either the **Custom Exports** submenu or **Custom Query** submenu.

Most of your export options are located under the Customer Exports submenu. However, the Custom Item Export option appears under the Custom Query submenu.

2. Click any of the export commands listed in the following table:

Table 3: Custom Exports Submenu

Command	Action
Export Invoices/Receipts	Click to export your invoice and receipt details. The data exports as a Microsoft Excel file.
Export Item Data	Click to export your item's code, description, standard unit of measure and purchase unit of measure. The data exports as a tab delimited text file that you can edit in Microsoft Excel.
Export My Company Ship-To Data	Click to export your companies addresses. (Address Manager). The data exports as a tab delimited text file that you can edit in Microsoft Excel.
Export Vendor Data	Click to export your vendor's addresses. (Vendor Manager). The data exports as a tab delimited text file that you can edit in Microsoft Excel.

Table 3: Custom Exports Submenu

Command	Action
Custom Item Export (Appears under the Custom Query submenu).	Click to export your item's code, category, location, manufacturer's lot number, expiration date, and on-hand quantity. The data exports as a Microsoft Excel file.

3. Edit the exported file in Microsoft Excel. Import the file back into SIMMS using the **Visual Import Manager**.