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# SIMMS

## Sales Project Manager

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### **Sales Project Management**

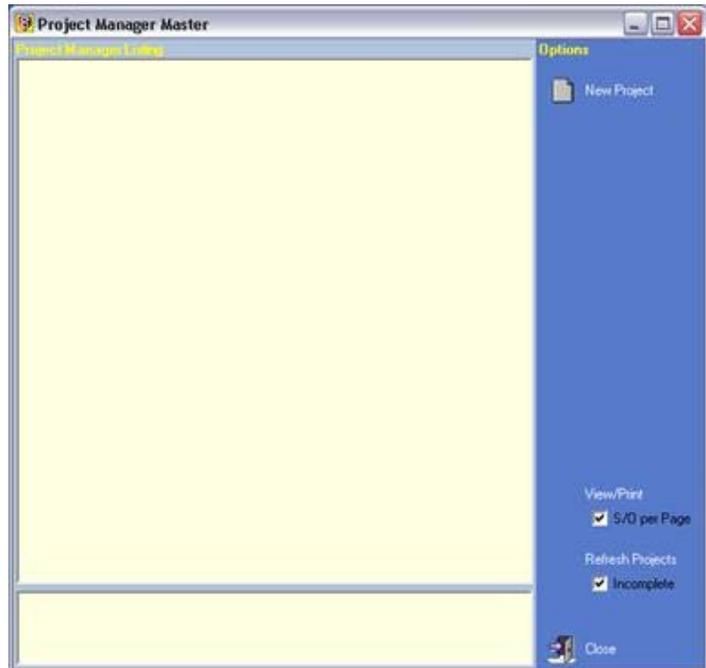
The Sales Project Manager enables a series of phases and/or steps of a larger project to be coordinated and managed in terms of each phase's relative sales orders.

On the Project Manager Master screen, users can re-open ongoing sales projects, embellish them (by adding sub-projects), add notes, and ultimately finalize (close) them.

### Creating a New Sales Project

From the SIMMS main screen, click the Project Management link in the left panel.

1. Click the **New Project** button.



2. Enter a Project Code for reference purposes.

3. Enter a description for the project.

4. Select a customer to whom the project will be assigned.

5. Select a start date (default is the current date).

*Once the project is completed (closed) at some future date, the user can return to this reference screen and select the **Close** checkbox.*

6. Click the **Save** button to create the project.  
The sales project will now be established.

From this point, various sub-projects can be created and particular sales orders related to each subproject can be assigned.

## Creating a Sub-Project

To create a new sub-project, do the following:

1. Click the **New Sub Project** button.
2. Enter in the project code, description and start date for the sub-project.
3. Click the **Save** button to create the sub-project.

## Assigning Sales Orders to a Sub-Project

To assign a sales order to a sub-project, do the following:

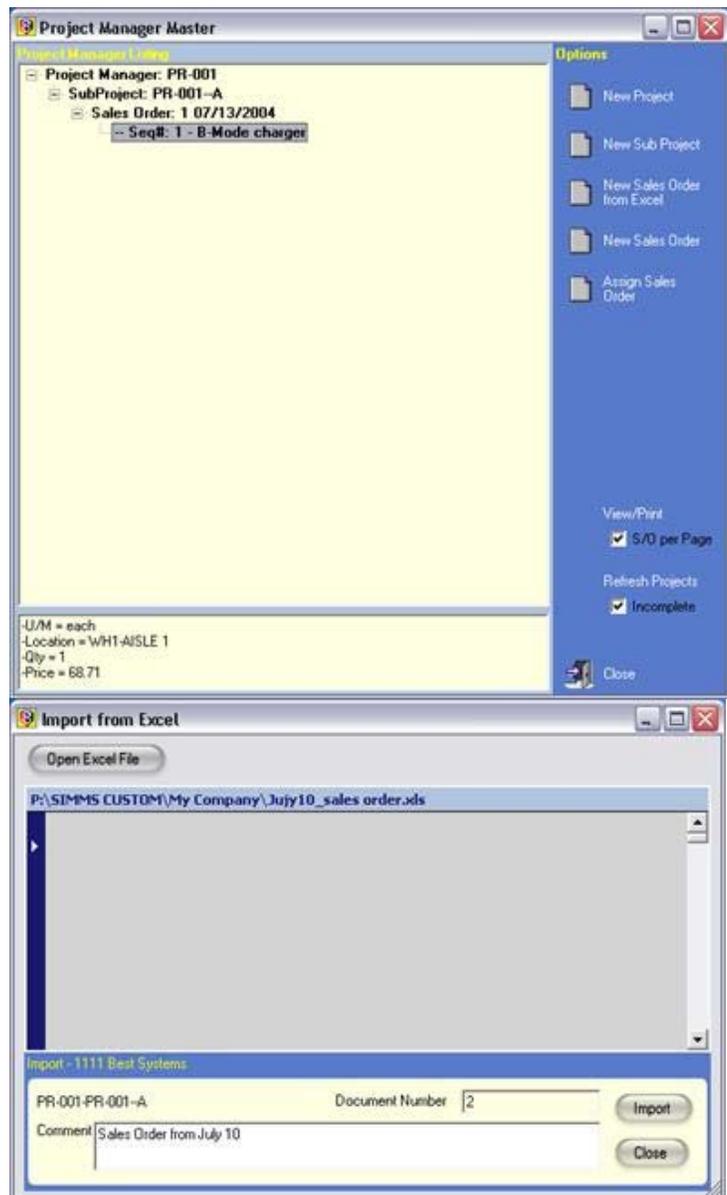
4. Click the **Assign Sales Order** button.
5. From the list of existing sales orders, highlight the sales order you wish to assign to the sub-project.
6. Click the **OK** button to assign the sales order.

*Users may create new sales orders for the sub-project by clicking the New Sales Order button and completing the sales order(s). Upon saving, the*



*sales order will be assigned to the sub-project.*

The newly-assigned sales order will bring its own document number and sequence numbers (if the sequencing feature was active during the creation of the sales order), and if the user drills down (by clicking the + symbol, details of the sales order may be viewed in the bottom left pane.



### Importing an Excel file as a Sales Order

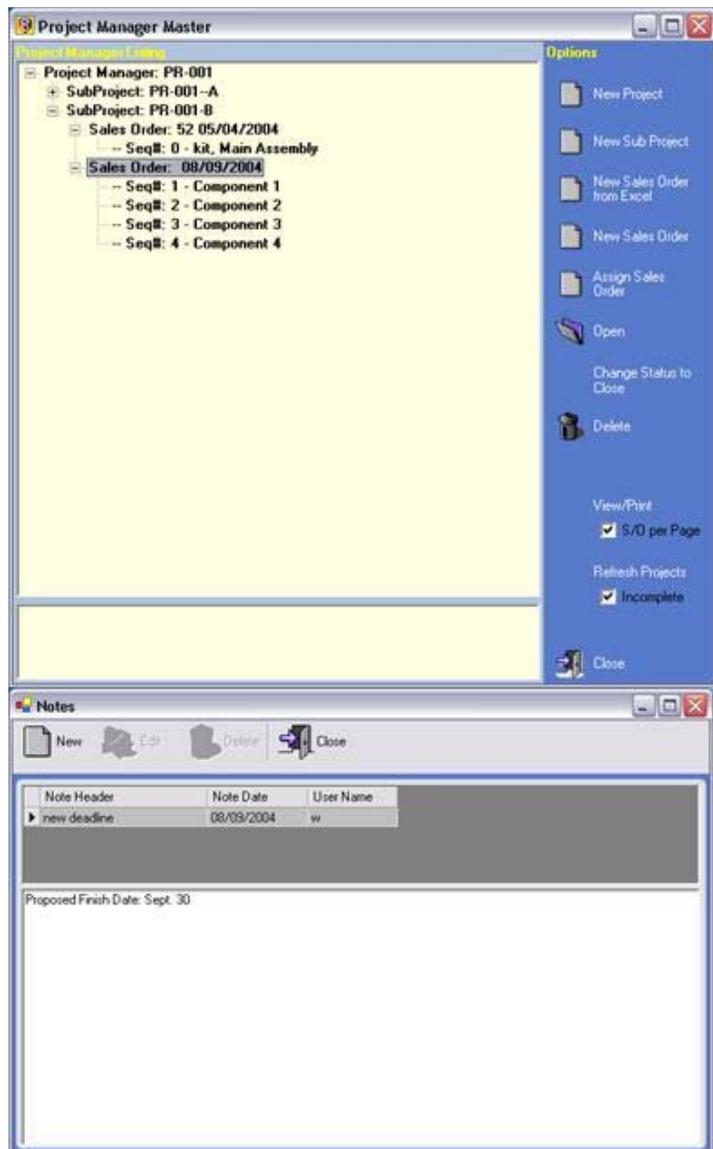
1. Click on the **New Sales Order from Excel** button.
2. Click the **Open Excel File** button to locate and select the Excel file.
3. Click the **Import** button to complete the process.

Users may continue to add sub-projects and assign sales orders to them as the needs of the project require.

### Editing Assigned Sales Orders

As the project itself progresses, items can be added to or deleted from the assigned sales orders.

1. Assigned sales order can be re-opened from the Project Manager Master screen by highlighting the sales order in the left pane and then clicking on the **Open** button.
2. After clicking Edit from the Return menu, making the change(s) and re-saving the sales order, return to the *Project Manager Master* screen to view the detail changes.



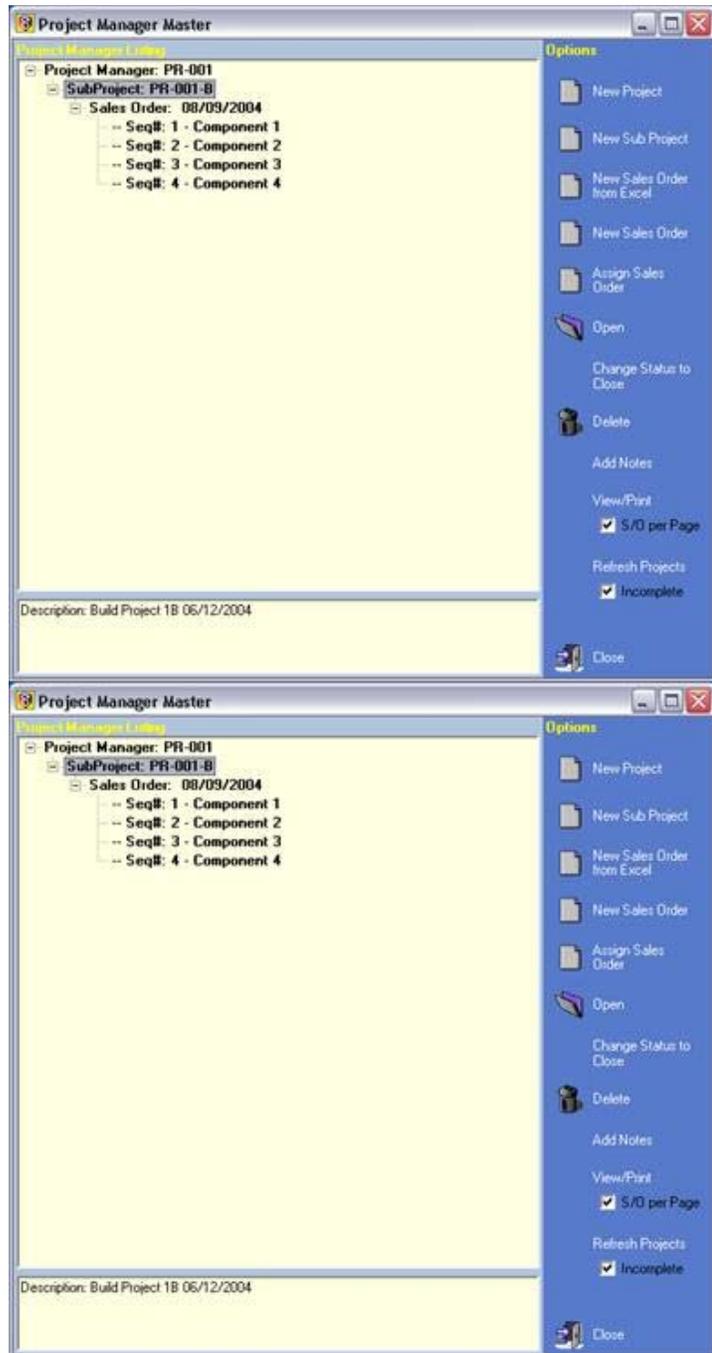
### Adding Notes to a Project or Sub-Project

1. Select the project or subproject in the left pane.
2. Click the **Add Notes** button.
3. Click the **New** button, and then add the note description and information desired.
4. Click the **Save** button to add the note.

*Users can import the contents of the note from an existing text (.TXT format) file by clicking the **Load File** button.*

### Closing Sales Orders

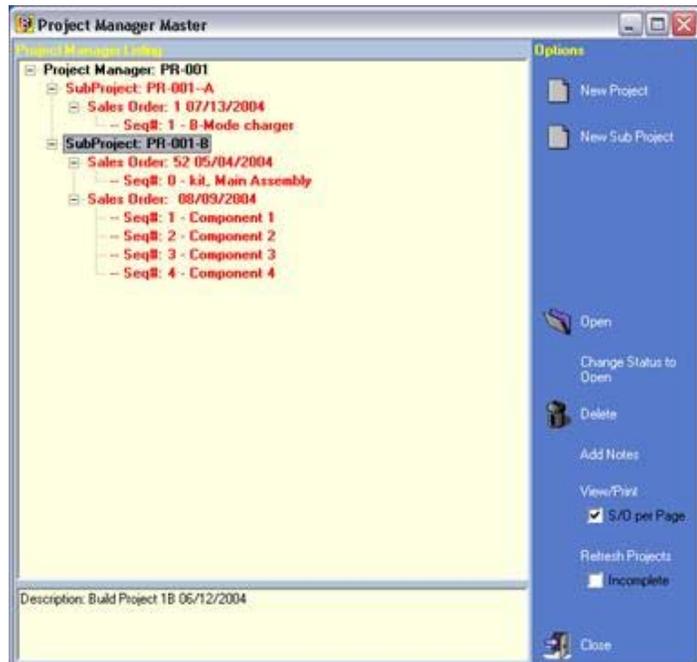
1. As the sales order status within each sub-project is completed, users can mark its closure (completion).
2. In the Project Manager Master screen, drill-down within the sub-project that contains the sales order you wish to close.
3. Highlight the sales order to be closed, then click the **Change Status to Close** button.
4. The sales order will be closed and will be removed from the drill-down list for the sub-project.



## Closing Sub-Projects

1. As each sub-project is completed, users can mark its closure (completion).
2. Highlight the sales order to be closed, then click the **Change Status to Close** button.
3. The sub-project will be closed and will be removed from the drill-down list for the project.

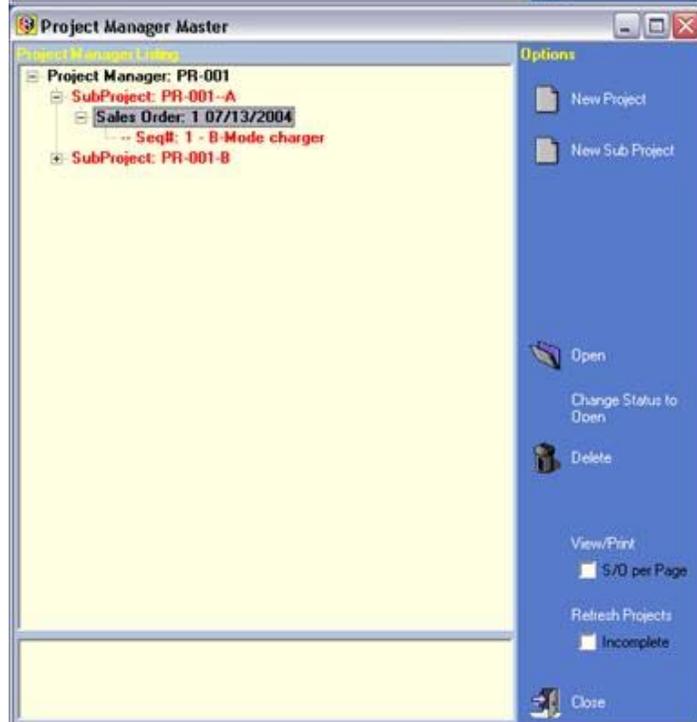
*To re-visit the sub-projects and sales orders of a particular project once it has been closed, deselect the **Incomplete** checkbox on the bottom left and the featured sub-projects and sales orders will again be visible.*



### Reopening a Sub-Project or Sales Order

To reopen a sub-project/sales order, do the following:

1. Clear the **Incomplete** checkbox, then click the **Refresh Projects** button.
2. Drill-down to the sub-project/sales order you wish to re-open and highlight it.
3. Click the **Change Status to Open** button.
4. Continue with any other activities required within an open sub-project/sales order.



### Printing a Project or Sub-Project

To print a project or sub-project, do the following:

5. Highlight the project/sub-project you wish to print.
6. Click the **View/Print** button to view the details of the selection. Proceed with printing a hard copy (if required).

*When printing the details of entire project, the*

report will show a continuous report of all cumulative sub-projects and their sales orders (as at left). To include only one respective sales order per page of printing, select the **S/O per Page** checkbox.

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**Project Manager Report**

Project Code	Description	Customer	Date	Status				
PR-001	Build Project 1A	1111 Best Systems	06/10/2004	Open				
SubProject Code	Description	Date	Status					
PR-001-A	Section One	06/11/2004	Closed					
Sales Order	Order No.	Date	Status					
	20299	07/13/2004	Closed					
Seq No.	Item Code	Location	Manuf. Lot	Exp. Date	Qty	U/M	Price	Outband
1	HMPS-0806	WH1-AISLE 1			1	each	68.71	3
This piece has the internal number 194								
SubProject Code	Description	Date	Status					
PR-001-B	Build Project 1B	06/12/2004	Closed					
Sales Order	Order No.	Date	Status					
	20193	05/04/2004	Closed					
Seq No.	Item Code	Location	Manuf. Lot	Exp. Date	Qty	U/M	Price	Outband
0	KIT234-L2	KIT-HOLDING			1	bulk	66.00	12
This piece has the internal number 106								
Sales Order	Order No.	Date	Status					
	20290	06/09/2004	Closed					

Current Page No: 1      Total Page No: 1      Zoom Factor: 88%

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