Contact Management

SIMMS Inventory Management Software 7.3

August 10, 2010
Contact Management

In the Contact Manager, you maintain detailed contact records for vendors, customers, manufacturers, and employees.

You can assign multiple contact types (vendor, customer, manufacturer, employee) to a single contact. For example, a vendor can also be a customer.

As well, in the Contact Manager, you can process payments, view the transactions associated with a contact, and generate reports for a contact.

Managing Vendor Contacts

Add a Vendor’s Contact Information

1. On the SIMMS [Start page], click the Contact Manager menu, and then click Vendors.

2. Click the New icon on the toolbar.

3. On the Information tab, type the appropriate contact information in the text boxes.

   Most often the Description text box is used for the vendor’s name.

   The Additional Description text box is a user-defined field (TextBox 10). You can change the label Additional Description and use the text box for whatever purpose you may find useful.

   To change the label Additional Description go to Setup>Settings>User-Defined fields, and change the label for TextBox 10.
The content of both the Description and Additional Description text boxes appears on transaction print outs.

4. If not selected, click **Is Active** to set this vendor as active.
   
   A vendor that is active is available for transactions. If in the future a vendor becomes inactive, you can return to this setting and clear the check box.

5. In the **Client Type** list, select a client type for your vendor.
   
   - To create a new client type, click the ellipsis button . The Client Type dialogue box opens. In the **Enter data** text box, type the name for your client type. Click **Save New Data**, and then click **Close**.
   
   By default, SIMMS creates the following client types at setup: Currency Trader, Freight Forwarder, Customs Broker, Port Warehouse, Trucking Broker, Financial Institution, Tax Agency.

6. In the **Default Contact** list, select the default contact for the vendor.
   
   - To create a new contact, click the ellipsis button . The Contact Person dialogue box opens. In the **Contact description** list, select the description (the vendor’s company name). Type the appropriate contact information in the text boxes. Click **Add**, and then click **Close**.
   
   Although you can have only one default contact, you can add, in the Contact Person dialogue box, as many contacts as you need for a vendor.
Add a Vendor's Shipping Information
You will need a vendor's shipping information to return purchased items to the vendor.

1. On the Contact Manager - Vendor window, click the Advanced tab.

![Contact Manager Advanced tab](image)

2. In the Department list, select the appropriate department for the vendor.
   - To create a new department, click the ellipsis button. The Departments dialogue box opens. In the Enter data text box, type the name of the department. Click Save New Data, and then click Close.

3. In the Sales/Purchasing Agent list, select your company’s purchasing agent that is assigned to this vendor.

4. In the Assigned Location list, select a location.
   - When you assign a location to a vendor you are reserving that location exclusively for that vendor.

5. In the Shipment Method list, select the shipment method for the vendor.

6. In the Shipping Account Number text box, type the vendor’s shipping account number.

7. In the Default Shipping Address list, select the vendor's default shipping address.
   - To create a new shipping address, click the Find button. The Address Manager dialogue box opens. Type the vendor’s shipping address in the text boxes. Click Save, and then click Close.
You can have multiple shipping addresses for a vendor, but only one default shipping address. If required for a transaction, you can change a vendor's default shipping address to another shipping address in the Transaction Manager.

8. In the Territory list, select a territory for your vendor.

   • To create a new territory, click the ellipsis button \(...\). The Territory dialogue box opens. In the Enter data text box, type the name of the territory. Click Save New Data, and then click Close.

Assign a Purchase Tax Schedule to a Vendor

1. In the Contact Manager - Vendors window, click the Advanced tab.

2. In the Purchase Tax Schedule list, select the tax schedule for the vendor.

Assign a Foreign Currency to a Vendor

If, for a vendor, you are using a different currency than your company’s default currency, do the following:

1. In the Contact Manager - Vendors window, click the Advanced tab.

2. In the Foreign Currency list, select your vendor’s currency.

If no foreign currency is assigned to a vendor, your company’s default currency is used for transactions with the vendor.

You have the option to change the currency used for a transaction in the Transaction Manager.

You set your default currency and foreign currencies at Modules>Currency Manager.

Select Vendor Terms

Vendor terms are the early payment discounts and late payment interest rates from a vendor.

1. In the Contact Manager - Vendors window, click the Advanced tab.
2. For Vendor Terms, in the **Description** list, select the vendor terms from the vendor.

![Vendor Terms](image1)

*Figure 4: Vendor Terms*

- To create new vendor terms, click the magnify icon . The Terms dialogue box opens. Type the vendor terms and a description in the text boxes. Click **Save New**. Click **OK**.

**Enter a Vendor’s Opening Balance**

If you are adding a vendor to SIMMS, and you have an existing balance with that vendor, you can record that existing balance in the Contact Manager.

1. In the **Contact Manager - Vendors** window, click the **Advanced** tab.
2. In the **Opening Balance** box, type the customer’s opening balance, and then click the **Set** button.

**Assign General Ledger Accounts to a Vendor**

This feature is available if you are using SIMMS general ledger.

1. In the **Contact Manager - Vendor** window, click the **Accounting** tab.
2. For **Vendor GL**, click the search button .

![Vendor GL](image2)

*Figure 5: Vendor general ledger accounts.*

A list of vendor GL accounts appears.

3. Click **Accounts Payable**, and then click **OK**.
4. For **Expense GL**, click the search button .

A list of expense GL accounts appears.

5. Click the appropriate expense account for the vendor, and then click **OK**.
After adding your vendor’s profile, click the **Save** icon on the toolbar.

**View Receipts and Purchase Orders in the Contact Manager**

1. In the **Contact Manager - Vendors** window, select a vendor, and then click the **Purchases** tab.

2. Choose one of the following:
   - **Receipts**
   - **Purchase Orders**

   Depending on your choice, SIMMS lists on the Document tab the receipts or purchase orders associated with your selected vendor.

   ![Diagram of the Purchases tab]

   - To view payments made on a receipt, click a document line item.

   SIMMS lists any payments in the Payment pane (below the Document pane).

   Only payments made on receipts appear in the Payment pane. Payments made on a purchase order appear as a credit owed by the vendor to your company.

   - To view an original document in the Transaction Manager, in the **Document** pane, click to select a document line item, and then click the folder that appears.
SIMMS opens your original document in the Transaction Manager.

- To view the items associated with a document, in the Document pane, click to select a document line item, and then click the Items tab.

The items associated with your document are listed on the Item tab.

**Apply Accounts Payable Payments to a Vendor**

1. In the Contact Manager - Vendors window, click the Purchases tab.

2. Choose one of the following:
   - Receipts
   - Purchase Orders

3. Click the New Payment button.

The Accounts Payable - Vendor's Payments window opens.

4. In the Payment Type list, select a payment type (cash, check, credit card, write off).

5. In the Payment Per Type box, type the payment amount.

6. In the Unpaid Receipts grid, click the Pay check box to apply a payment to a specific receipt.

7. Press the TAB key.
SIMMS updates the Payment field in the grid.

8. Click **Save**, and then click **Close**.

**Generate a Purchase Report**

1. In the **Contact Manager - Vendors** window, click the **Reports** menu, and then click **Purchase Reports**.

   The Accounts Payable - Report Generator opens.

![Figure 9: Accounts Payable - Reports Generator](image)

2. Under **Report Type**, choose the type of report you would like to generate.

3. Depending on the type of report you are generating, do any of the following:
   
   - To filter the information displayed in the report by date, under **Date Filter**, clear the **No Date Filtering** check box, and set the initial date and final date for your search.
   
   - To refine your report results, under **Extra Options**, click and select the appropriate options to refine your report results.

4. Under **Vendor**, in the **Description** list, select the vendor for which you are generating a report.

5. Click the **Generate** button.

   Your report displays. You can view, print, export, or e-mail your report.
6. Click to close your report, and then click the Close button to close the Accounts Payable - Report Generator.

Managing Customer Contacts

Add a Customer’s Contact Information

1. In the SIMMS [Start page], click the Contact Manager menu, and then click Contacts.

Figure 10: Contact Manager menu

The Contact Manager - Customers window opens.

2. Click the New icon on the toolbar.

3. On the Information tab, type in the text boxes the appropriate contact information.

Most often the Description text box is used for the customer’s name.

The Additional Description text box is a user defined field (TextBox 10). You can change the label Additional Description and use the text box for what ever purpose you may find useful.

To change the label Additional Description go to Setup>Settings>User-Defined fields, and change the label for TextBox 10.

The content of both the Description and Additional Description text boxes appear on transaction print outs.

4. If not selected, click Is Active to set this customer as active.

A customer that is active is available for transactions. If in the future a customer becomes inactive, you can return to this setting and clear the check box.

5. In the Client Type list, select a client type for the customer.

• To create a new client type, click the ellipsis button . The Client Type dialogue box opens. In the Enter data
text box, type the name of your client type. Click Save New Data, and then click Close.

By default, SIMMS creates the following client types at setup: Currency Trader, Freight Forwarder, Customs Broker, Port Warehouse, Trucking Broker, Financial Institution, Tax Agency.

6. In the Default Contact list, select the default contact for the customer.

   • To create a new contact, click the ellipsis button . The Contact Person dialogue box opens. In the Contact Description list, select the description (the contact’s company name). Type the appropriate contact information in the text boxes. Click Add, and then click Close.

Although you can have only one default contact, you can add, in the Contact Person dialogue box, as many contacts as you need for a customer.

Add a Customer's Shipping Information

1. In the Contact Manager - Customer window, click the Advanced tab.

2. In the Department list, select the appropriate department for the customer.

   • To create a new department, click the ellipsis button . The Department dialogue box opens. In the Enter data text box, type the name of the department. Click Save New Data, and then click Close.
3. In the **Sales/Purchasing Agent** list, select your company’s sales agent that is assigned to this customer.

4. In the **Assigned Location** list, select a location.

   With this feature, you can manage consigned stock. For example, an agent takes unpaid inventory from a warehouse and stores and sells it from his home. If you create an unique location, and assign it to the agent, then you can track the inventory the agent has in his possession.

   You can assign a location to only one contact.

5. In the **Shipment Method** list, select the shipment method for your customer.

6. In the **Shipping Account Number** text box, type the customer’s shipping account number.

7. In the **Default Shipping Address** list, select the customer’s name.

   - To add a new shipping address for this customer, click the **Find** button. The **Address Manager** dialogue box opens. Type the customer’s shipping address in the text boxes. Click **Save**, and then click **Close**.

   You can have multiple shipping addresses for a customer, but only one default shipping address. If required for a transaction, you can change a vendor’s default shipping address to another shipping address in the Transaction Manager.

8. In the **Territory** list, select the customer’s territory.

   - To create a new territory, click the ellipsis button . The **Territory** dialogue box opens. In the **Enter data** text box, type the name of the territory. Click **Save New Data**, and then click **Close**.

**Enter the Payment Terms for a Customer**

1. In the **Contact Manager - Customer** window, click the **Advanced** tab.

2. For **Payment Terms**, in the **Description** list select the appropriate payment terms for the customer.
• To create new payment terms, click the magnify icon . The Terms dialogue box opens. Type your payment terms and description in the text boxes. Click Save New, and then click OK.

Assign a Foreign Currency for a Customer
If, for a customer, you are using a different currency than your company’s default currency do the following:

1. In the Contact Manager - Customers window, click the Advanced tab
2. In the Foreign Currency list, select your customer’s currency.

![Figure 13: Foreign Currency list](image)

If no foreign currency is assigned to a customer, your company’s default currency is used for transactions with the customer. You have the option to change the currency used for a transaction in the Transaction Manager.

You set your default currency and foreign currencies at Modules>Currency Manager.

Enter a Customer's Credit Limit

1. In the Contact Manager - Customers window, click the Advanced tab.
2. Under Credit Limit, choose one of the following:
   • Unlimited
   • Maximum

![Figure 14: Customer's credit limit](image)

3. If you chose Maximum, type in the box the maximum dollar amount for the customer’s credit.
Assign a General Ledger Account to a Customer
This feature is available if you are using SIMMS General Ledger.

1. In the Contact Manager - Customers window, click the Accounting tab.
2. For Customer GL, click the search icon.

A list of customer GL accounts displays.

3. Click Accounts Receivable, and then click OK.

Assign a Price Level to a Customer
If you are using price level discounting, you assign a price level to your customer in the Contact Manager.

1. On the Contact Manager - Customers window, select your customer, and then click the Advanced tab.
2. In the Price Level list, select the appropriate price level for the customer.

Enter a Customer’s Opening Balance
If you are adding a customer to SIMMS, and they have an existing balance with your company, you can record that existing balance in the Contact Manager. The opening balance for a customer is recorded as a Miscellaneous Charge.

1. In the Contact Manager - Customers window, and then click the Advanced tab.
2. In the Opening Balance box, type the customers opening balance, and then click the Set button.

Record a Customer’s Credit Card Information
1. In the Contact Manager - Customers window, click the Accounting tab.
2. In the Credit Card pane, click New.
The Credit Card dialogue box opens.

3. In the **Type** list, select a credit card type (Visa, Master Card, and so on).
   - To create a new credit card type, click the magnify icon \( \text{🔍} \). The Credit Card Type dialogue box opens. In the Card Type text box, type the credit card name. Click **Insert**, and then click **Close**.

4. Type the remaining credit card information into the appropriate text boxes.

5. If you are using SIMMS General Ledger feature, for **CC Account**, click the search icon \( \text{🔍} \). A list of credit card accounts displays.

   **Note:** *If no credit card accounts are listed, then there are no credit card accounts set up in your chart of accounts. You need to set up your credit card accounts in the chart of accounts.*

6. Click to select the appropriate credit card account, and then click **OK**.

7. Click **Save**.
   - The Credit Card dialogue box closes.

**Select the Shipping Options for a Customer**

1. In the **Contact Manager - Customers** window, click the **Others** tab.
At the bottom of the window there are three options related to shipping.

2. Click the appropriate options for your customer.

Review Table 1: Shipping Options for guidance.

<table>
<thead>
<tr>
<th>Label</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not charge freight for this client</td>
<td>Click to not charge freight for this customer.</td>
</tr>
<tr>
<td>Override freight and use Percentage</td>
<td>If your freight costs are calculated by SIMMS automatically:</td>
</tr>
<tr>
<td></td>
<td>Click to override automatically calculated freight costs.</td>
</tr>
<tr>
<td></td>
<td>Type in the box the percentage of the net total to assign as the</td>
</tr>
<tr>
<td></td>
<td>freight cost for sales orders and issues.</td>
</tr>
<tr>
<td></td>
<td>The option to automatically calculate freight costs is at Setup&gt;</td>
</tr>
<tr>
<td></td>
<td>Settings&gt;Global Settings&gt;Automation tab&gt;Automatically calculate</td>
</tr>
<tr>
<td></td>
<td>freight check box.</td>
</tr>
<tr>
<td>Do not auto-fill sales order if the quantity for any item</td>
<td>If you are using the Fulfillment Manager, type in the box the</td>
</tr>
<tr>
<td>is less than:</td>
<td>minimum quantity of an item required to auto-fill a sales order.</td>
</tr>
<tr>
<td></td>
<td>This option defines the auto-fill rules for this customer only.</td>
</tr>
<tr>
<td></td>
<td>It is used by the Fulfillment Manager to determine at what point the</td>
</tr>
<tr>
<td></td>
<td>customer’s sales orders are filled.</td>
</tr>
<tr>
<td></td>
<td>The auto-fill rule defined in a customer’s contact profile overrides</td>
</tr>
<tr>
<td></td>
<td>the auto-fill rules set at Setup&gt;Settings&gt;Global Settings&gt;Automation</td>
</tr>
</tbody>
</table>

After adding your customer’s profile, click the Save icon on the toolbar.
View the Issues, Sales Orders, or Quotes for a Customer

1. In the **Contact Manager - Customers** window, click the **Sales** tab.

2. Choose one of the following:
   - **Issue**
   - **Sales Order**
   - **Quote**

   Depending on your choice, SIMMS lists in the Document pane the issues, sales orders, or quotes associated with your selected customer.

   - To view payments made on an issue, in the **Document** pane, click to select a document line item.
     SIMMS lists any payments in the Payment pane (below the Document pane).
     Only payments made on an issue appear in the Payment pane. Payments made on a sales order appear as a credit.

   - To view the original document in the Transaction Manager or Quote Manager, in the **Document** pane, click to select a document line item, and then click the folder that appears.
     SIMMS opens issue and sales order in the Transaction Manager, and quotes in the Quotes Manager.
• To view the items associated with a document, in the Document pane, click to select a document line item, and then click the Items tab.

The items associated with your document are listed on the Item tab.

Apply Account Receivable Payments from a Customer
1. In the Contact Manager - Customers window, click the Sales tab.
2. Choose one of the following:
   • Issue
   • Sales Order
3. Click the New Payment button.
   The Accounts Receivable - Customer Payment window opens.
4. In the Payment Type list, select a payment type (cash, check, credit card, write off).
5. In the Payment Per Type box, type the payment amount.
6. In the Unpaid Invoices grid, click the Pay check box to apply the payment to a specific invoice.
7. Press the TAB key.

   Figure 19: A detail of the Accounts Receivable window

   Select your payment type from the Payment Type list.

   Type your payment amount in the Payment Per Type box.

   Figure 20: A detail of the Accounts Receivable window

   Click the Pay check box to apply a payment to a specific invoice.

   Press the TAB key to update the payment field.
SIMMS updates the Payment field in the grid.

8. Click **Save**, and then click **Close**.

**Generate a Sales Report**

1. In the **Contact Manager** window, click the **Reports** menu, and then click **Sales Reports**.

![Image of Reports menu](image)

**Figure 21: Reports menu**

The Accounts Payable - Report Generator opens.

2. Under **Report Type**, choose the type of report you would like to generate.

3. Depending on the type of report you are generating, do any of the following:
   - To filter the information displayed in a report by date, under **Date Filter**, clear the **No Date Filtering** check box, and then set the initial date and final date for your search.
   - To refine your report results, under **Extra Options**, click and select the appropriate options to refine your report results.

4. Under **Customer**, in the **Description** list, select the customer for which you are generating a report.

5. Click the **Generate** button.

   Your report displays. You can view, print, export, and e-mail your report.

6. Click ![Close button](image) to close your report, and then click the **Close** button to close the Accounts Payable - Report Generator.
Common Tasks for all Contact Types

Add a Note to a Contact's Profile

1. In the Contact Manager, click the Notes tab.
2. Click the New button.
   The Note dialogue box opens.
3. In the Description text box, type a description for your note.
4. In the main text box, type your note.
   • You can upload the content of a text file (.TXT) into the Notes dialogue box. Click the Load File button. The Open dialogue box opens. Select your text file, and then click Open. The content of your text file is entered into the main text box.
5. Click Save.
   The Notes dialogue box closes.
6. In the Enable Alert column, click the check box to have the note display when the customer is selected in the Contact Manager or Transaction Manager.
   You can have more than one note attached to a contact, but you can have only one note automatically display at a time.

Search for a Contact

1. In the Contact Manager, for any of your contact types (vendor, customer, manufacture, employee), click the Search icon.
   The Enhanced Contact Search window opens.
2. Type the appropriate information in the text boxes.
   You do not need to enter all the information in the text boxes. Often one or two pieces of information is enough for SIMMS to find your contact.
3. To use wildcard characters, click Left and/or Right.
   Review Table 2: Wildcard Characters for guidance.
4. Click Find, your search results appear in the grid.
5. Click OK to close the Enhanced Contact Search window.
**Wildcard Characters in Searches**

You can use wildcard characters for your searches. For example, if you typed *ow* in the Description text box, and click the Left option your search results would include *owed*, *owing*, and *owned*.

With the same letters, and the Right option selected, your search results would include *how*, *throw*, and *plow*.

Again with *ow* typed in the Description text box, and both the Right and Left option selected, the search results would include *owed*, *power*, and *throw*.

<table>
<thead>
<tr>
<th>Position</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Left</td>
<td>Finds the characters or numbers at the beginning of the text.</td>
</tr>
<tr>
<td>Right</td>
<td>Finds the characters or numbers at the end of the text.</td>
</tr>
<tr>
<td>Left and Right</td>
<td>Finds the characters or numbers anywhere in the text.</td>
</tr>
</tbody>
</table>

**Add an Alternate Ship-to Address for a Contact**

In the Transaction Manager, you have the option to change the default ship-to address to an alternate ship-to address. You add the alternate ship-to address in the Address Manager.
1. In the **Contact Manager** window, click the **Tools** menu, and then click **Ship To**.

![Figure 22: Tools menu](image)

The Address Manager dialogue box opens.

2. In the **Contact** description list, select a contact.

3. In the text boxes, type the appropriate information for your contact’s alternate ship-to address.

4. Click **Add**, and then click **Close**.

*Note:* In the **Transaction Manager**, you also have the option to change the default bill-to address to an alternate bill-to address. Like the alternate ship-to address, you add the alternate bill-to address in the **Address Manager**.

**Edit a Contact’s Profile**

To prevent the unintentional changes to a contact’s profile, you cannot edit a profile without first clicking the Edit icon.

1. In the **Contact Manager** window, for any contact type (vendor, customer, manufacturer, employee), select a contact, and then click the **Edit** icon on the toolbar.

2. Make the desired changes to the contact’s profile, and then click the **Save** icon on the toolbar.
Generate a Contact Report

1. In the Contact Manager window, click the Reports menu, and then click Reports Generator.

   The Contact Report Generator dialogue box opens.

   ![Contact Report Generator](image)

   Figure 23: Contact Report Generator

2. Under Select Contact Type, click a contact type (customers, vendors, manufacturers or employees).

   You can select more than one contact type to include in your report.

3. To show a contact’s details, under Options, click Show Details.

   With this option selected the contact report shows more details from your contact’s profile, such as the default contact, foreign currency, default location, and so on.

4. If you are using user-defined fields, you can show these fields in the report. Under Options, click Show User Defined Fields.

   The User Defined Fields section expands.

5. Under User Defined Fields, in the Selected Fields list, click the check box for the user-defined fields to include in your report.

   Only selected user-defined fields appear in the report.
6. To sort the order in which the user-defined fields appear in the report, in the Selected Fields list, click to select a user defined field, and then click the side arrow ⬤.

    SIMMS moves your selected user-defined field to the Sorted by Fields list.

    Repeat this step to add more user-defined fields to the Sorted by Fields list.

7. In the Sorted by Fields list, click to select a user-defined field, and then click either the up arrow ↑ or down arrow ↓ to sort the list.

8. Click the Generate button.

    The Contact Report displays. You can view, print, export, or e-mail the report.

9. Click ✗, and then close the Contact Report Generator.