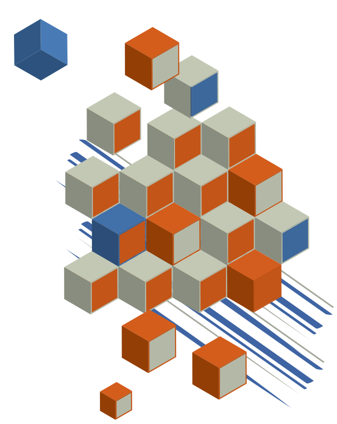
# Contact Management

**SIMMS** Inventory Management Software 7.3

August 10, 2010



# Contents

# 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**.

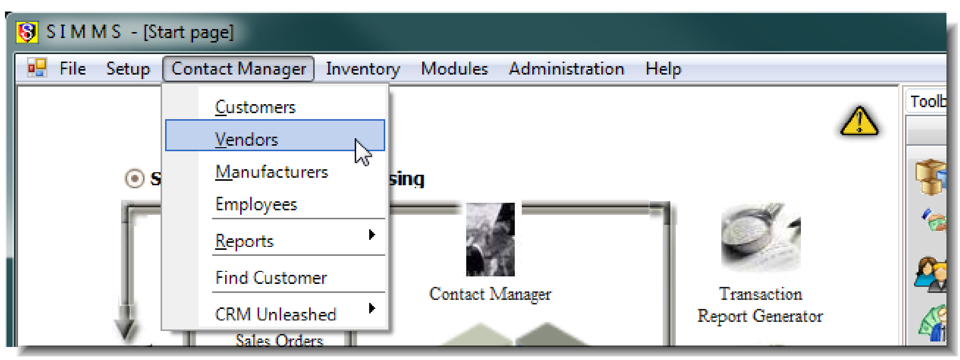



*Figure 1: Contact Manager menu*

   The Contact Manager - Vendors window opens.

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 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 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.

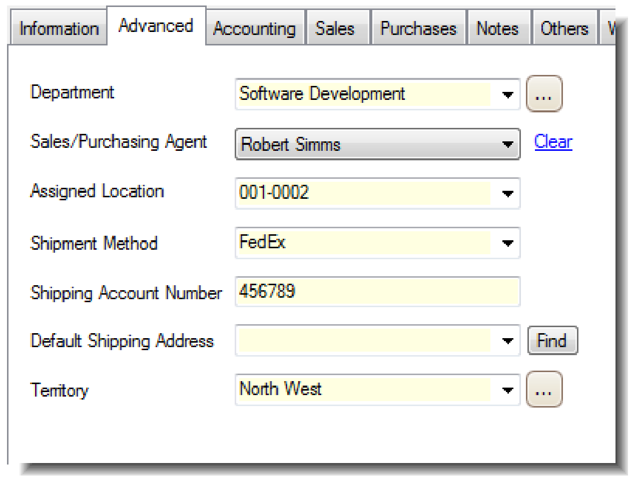



*Figure 2: Contact Manager Advanced tab*

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**.

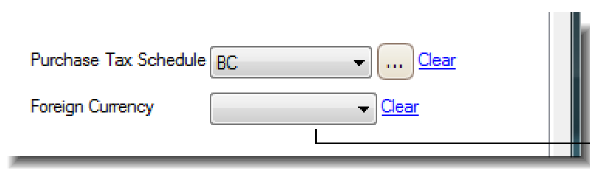
## Assign a Purchase Tax Schedule to a Vendor

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 selected, your company’s default currency is used.*

*Figure 3: Foreign Currency list*

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.

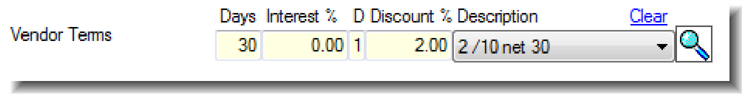



*Figure 4: Vendor Terms*

- 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 customers 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.

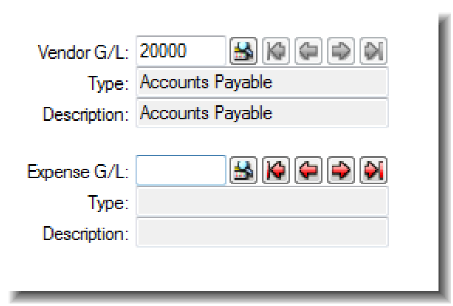



*Figure 5: Vendor general ledger accounts.*

   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.

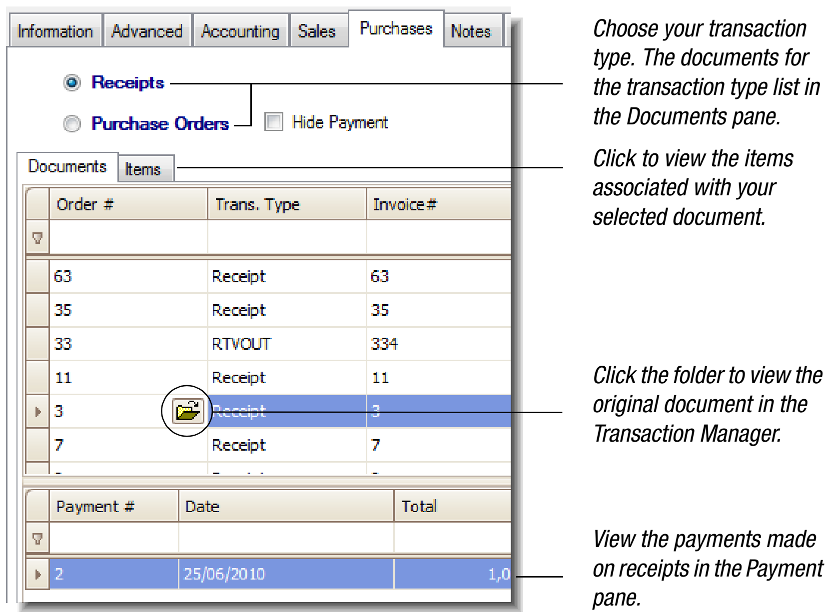



*Figure 6: Purchases tab*

- 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.

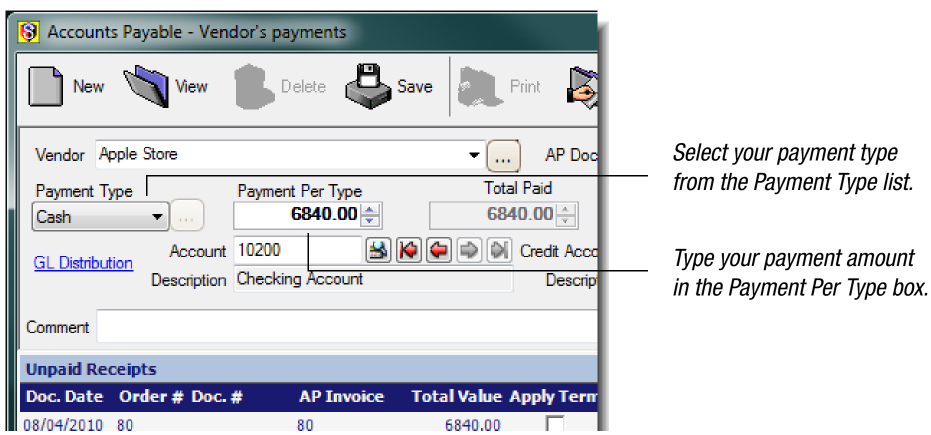



Figure 7: A detail of the Accounts Payable window

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.

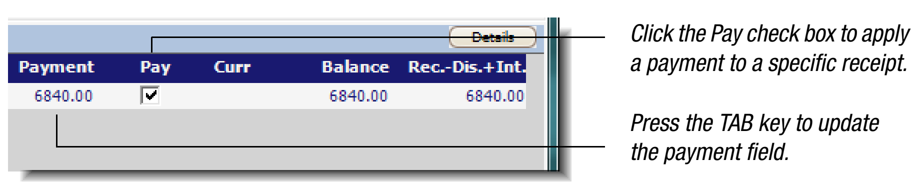



Figure 8: A detail of the Accounts Payable window

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.

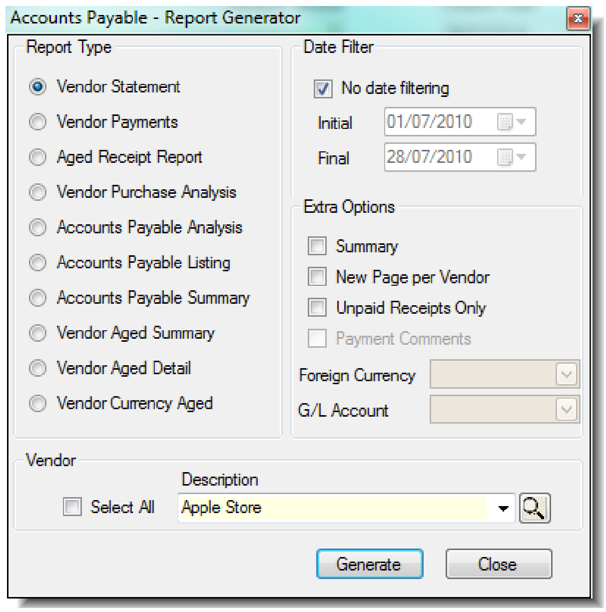



*Figure 9: Accounts Payable - Reports Generator*

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**.

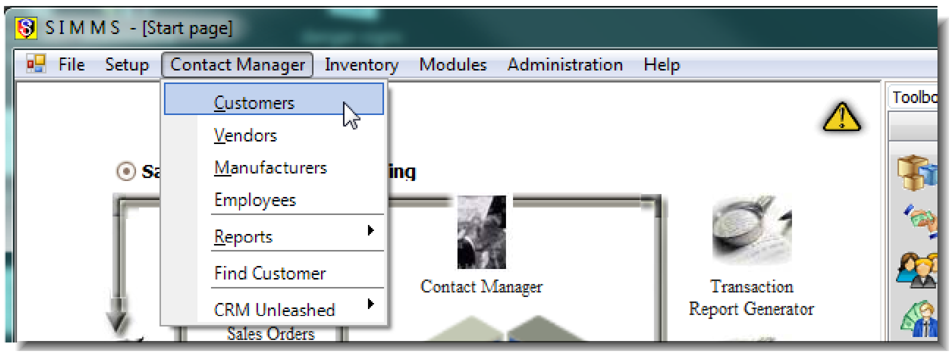



*Figure 10: Contact Manager menu*

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.

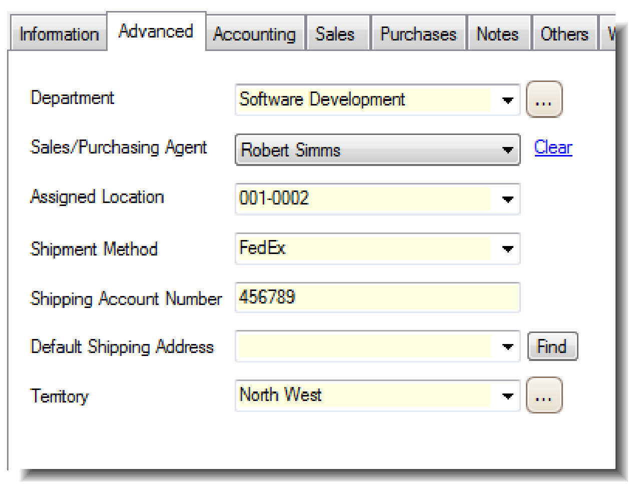



*Figure 11: Contact Manager Advanced tab*

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.

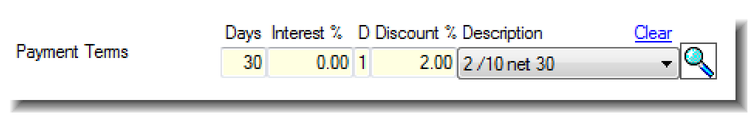



*Figure 12: Customer's payment terms*

- 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.

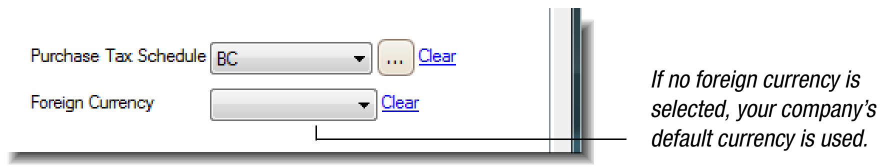



*Figure 13: Foreign Currency list*

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**

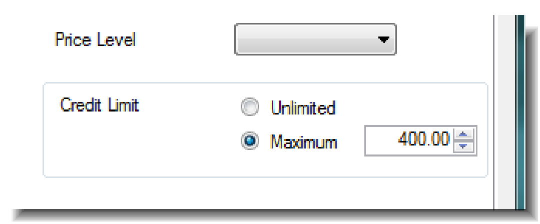



*Figure 14: Customer's credit limit*

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 .

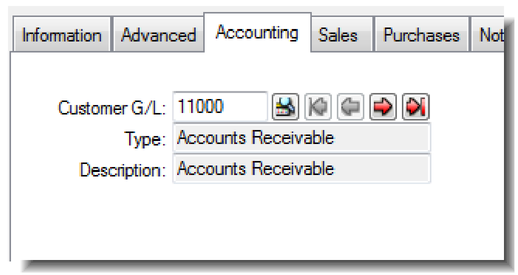



*Figure 15: A customer general ledger account*

   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.

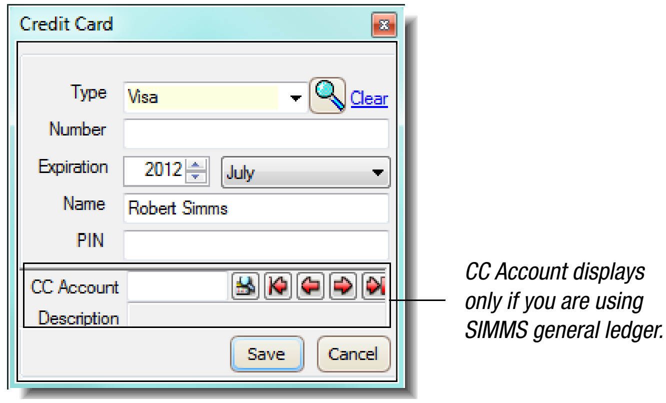



*Figure 16: Credit card dialogue box*

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 . 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 .

    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.

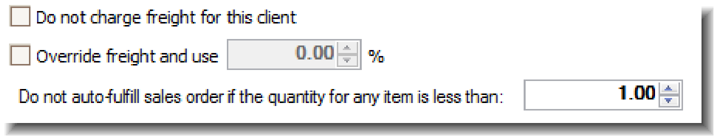



*Figure 17: Shipping options*

2. Click the appropriate options for your customer.

   Review *Table 1: Shipping Options* for guidance.

**Table 1: Shipping Options**

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

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**

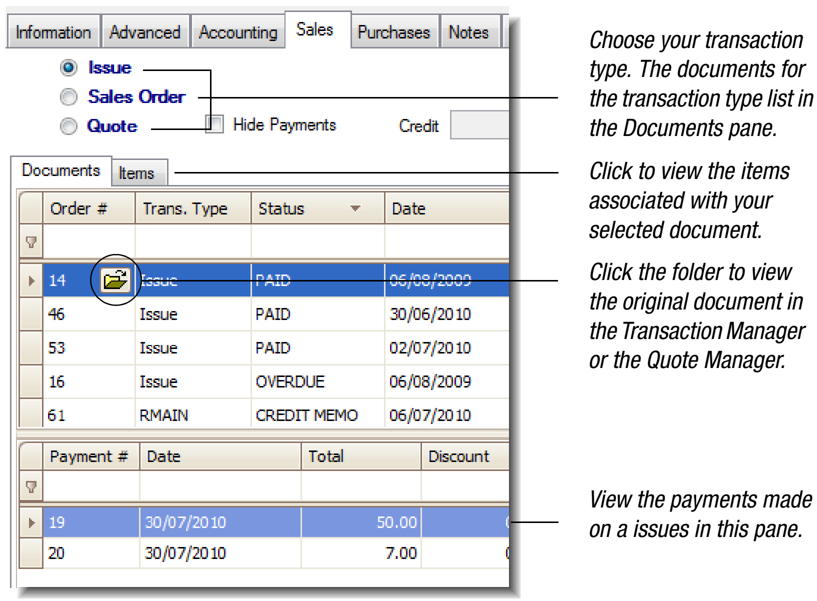



*Figure 18: Sales tab*

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 a 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).

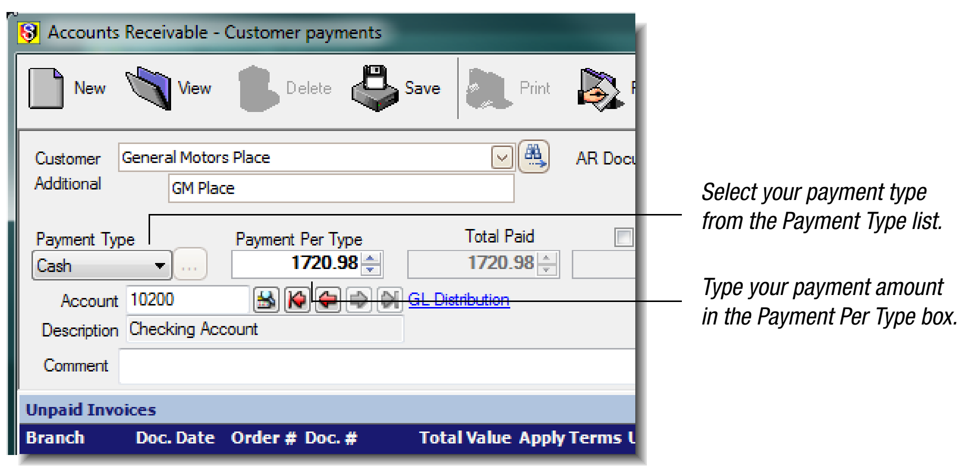



*Figure 19: A detail of the Accounts Receivable window*

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.

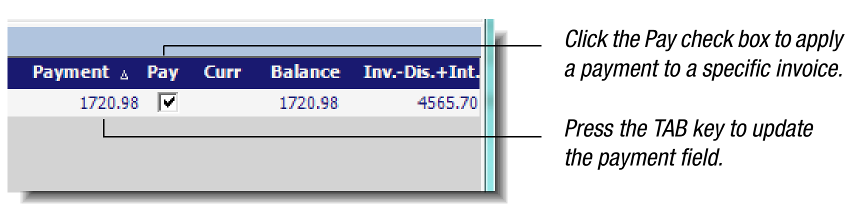



*Figure 20: A detail of the Accounts Receivable window*

7. Press the **TAB** key.

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**.

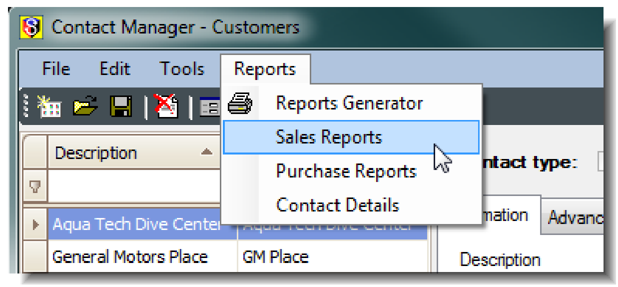



*Figure 21: Reports menu*

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  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 to 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 2: Wildcard Characters**

| Position | Results |
|---|---|
| Left | Finds the characters or numbers at the beginning of the text. |
| Right | Finds the characters or numbers at the end of the text. |
| Left and Right | Finds the characters or numbers anywhere in the text. |

## 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**.

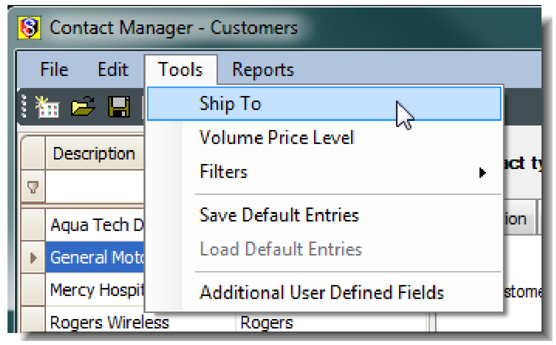



*Figure 22: Tools menu*

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.

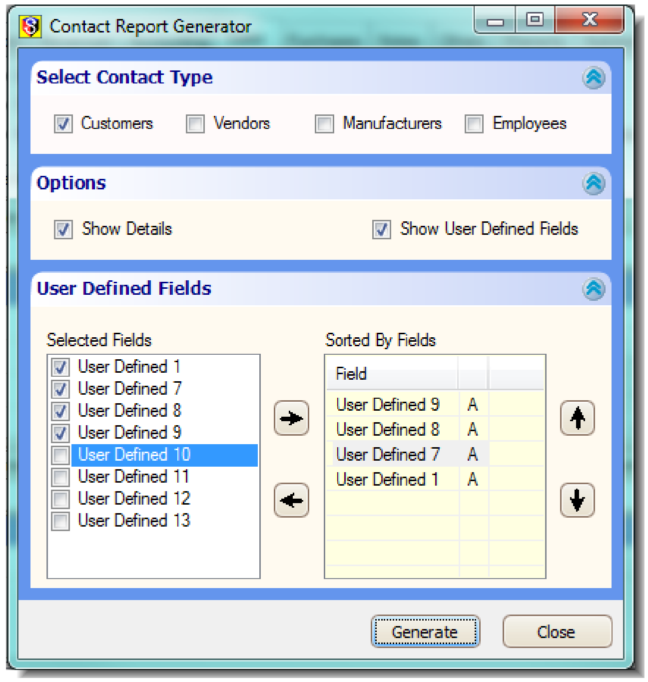



*Figure 23: Contact Report Generator*

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.