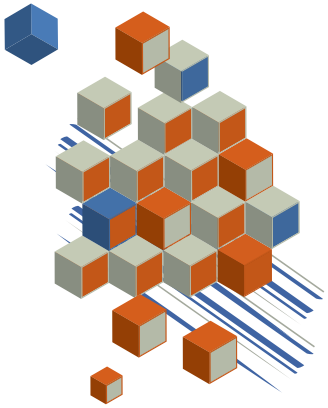
SIMMS Mobile

SIMMS Inventory Management Software 8.0

February 14, 2012



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SIMMS Mobile

With SIMMS Mobile, you can perform such essential tasks as receive inventory, physical counts, and stock adjustments, all on your Windows mobile device. You can then transfer the data you generate on your mobile device to SIMMS. You can also transfer data from SIMMS to your mobile device.

Installing SIMMS Mobile

You need to download and install several files to get SIMMS Mobile operating. Some of these files are downloaded and installed on your computer, the others on your mobile device.

You can find the links to these files at http://setup.kcsi.ca/dc.aspx.

If your computer's operating system is Windows Vista or Windows 7 you use Windows Mobile Device Center to handle synchronization between your Windows Mobile device and your computer. If you are using Windows XP, synchronization is handled with Active Sync.

Install SIMMS Mobile Components on Your Computer

Make sure your mobile device is in its cradle and the cradle is connected to your computer.

1. If not already installed, install **Windows Mobile Device Center** on your computer (Windows Vista, Windows 7).
2. Install the following files on your computer:
   - **Remote Display Control Host**
     The Remote Display Control Host is not compatible with Windows Vista.
   - **Microsoft .NET Compact Framework 2.0 SP1**
   - **Microsoft SQL Server Compact for Devices**
   - **Microsoft SQL Server Compact 3.5 Run Time**

   You can find the links to these files at http://setup.kcsi.ca/dc.aspx under the heading **Workstation Installation Instructions**.

   To install a file, click its link, and then click **Run**. Follow the instructions on the screen. Check your mobile device for additional instructions: A prompt will appear asking you to choose the location you want to install the file. Choose **Device**, and then click **Install**.

Install SIMMS Mobile Components on Your Mobile Device

Make sure your mobile device is in its cradle and the cradle is connected to your computer.

You can find links to the files you need at http://setup.kcsi.ca/dc.aspx, under the heading **Device Installation Instructions**.

1. Download the following files to your device:
   - **SQL Sever Compact 3.5 Core**
   - **SQL Sever Compact 3.5 Tools**
   - **SQL Server Compact 3.5 Replication**
   - **SIMMS Mobile Program**

   Next install the files on your device.
2. On your mobile device, click the **Start** menu, and then click **File Explorer**.
3. Click the file **sqlce.ppc.wce5.armv4i.CAB** to install SQL Server Compact 3.5 Core.
4. A prompt appears, asking you to choose the location you want to install the file. Choose **Device**, and then click **Install**.

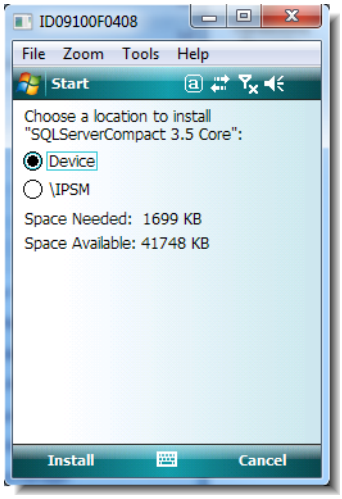

Figure 1: Choose Device and then click Install.

5. In the same way as the previous file, install the remaining three files in the following order:
   - **sql.dev.ENU.ppc.wce5.armv4i.CAB** (SQL Server Compact 3.5 Tools).
   - **sql.repl.ppc.wce5.arm4i.CAB** (SQL Server Compact 3.5 Replication).
   - **SimmsMobile.CAB** (SIMMS Mobile).

Using your Mobile Device

These instructions explain how to enter data into SIMMS Mobile manually. For example, the instructions on how to do a stock adjustment include how to manually enter an item's details. However, a more typical scenario is that you will scan an item's details into SIMMS Mobile rather than entering it manually. You can disregard any part of these instructions that you want to perform with a scanner.

Note: *An inventory of 5000 or more items will slow down your mobile device. This is because SIMMS Mobile generates a list of all those items. The list is generated so you can manually select your items when performing a task such as creating a sales order or stock adjustment. If you are using a scanner to enter your item's details, the item list is unnecessary. Configure SIMMS Mobile so it does not generate this list. To do this go to* **SIMMS Mobile Start page > Menu > Settings > Items By** *> and click either* **UPC** *or* **Code***. The result is SIMMS Mobile will run faster because it does not generate a list of your inventory items. You will need to enter your item's details by scanning either its UPC or item code, depending on your settings.*

Create a Purchase Order

SIMMS assigns a purchase order number to your purchase order after you sync your data with SIMMS.

1. On the **SIMMS Mobile** start page, click **Purchase Orders**.
2. Click **New PO.**
3. Click **Go**.

   A list of your vendors appears.
4. Select a vendor, and then click **Select**.
5. In the **Location** list, select a location.
6. In the **Item** list (under Search by Description), select the item you want to purchase.
7. If required, enter your item's lot number and expiration date.
8. In the **Qty** text box, type the quantity of the item you want to purchase.
9. Click **Insert**.

Receive Items on a Purchase Order

1. On the **SIMMS Mobile** start page, click **Receive PO**.
2. Click **Go**.

   A list of your purchase orders appears.

3. Select a purchase order, and then click **Select**.
4. Click on the item you want to receive, and then in the **Received** box enter its quantity.
5. Click **Save**.

Create a Receipt of Goods

1. On the **SIMMS Mobile** start page, click **Receipt**.
2. Click **Go**.

   A list of your vendors appears.
3. Select a vendor, and then click **Select**.
4. In the **Doc#** text box, type your receipt's document number.
5. In the **Location** list, select a location.
6. In the **Item** list, select the item you are receiving into inventory.
7. If required enter the item's lot number, expiration date, serial number, or user serial number in the appropriate boxes.
8. In the **Quantity** box (adjacent to the Cost box), type the quantity of the item you are receiving into inventory.
9. Click **Insert**.

Adjust Stock Quantities

1. On the **SIMMS Mobile** start page, click **Stock**.
2. In the **Location** list, select a location, and then click **Go**.
3. Select an item, and then click the **Adjust** button.
4. Select the item's location/quantity combination whose quantity you want to adjust.
5. In the **Count** box, type your item's new quantity, and then click **Set**.

Count Stock

1. On the **SIMMS Mobile** start page, click **Physical Count**.
2. In the **Location** list, select the location in which you want to count stock.
3. In the **Item** list, select an item.
4. If required select your item's lot number and expiration date in the appropriate boxes.
5. In the **Qty** box, type your item's physical count.

6. Click **Add**.

Create a Transfer

You can have one item on a transfer. You can link your transfer to kit project.

1. On the **SIMMS Mobile** start page, click **Transfer.**
2. In the **Initial Location** list, select the location you want to transfer your item from.
3. In the **Item** list (under Search by Description), select your item.
4. If required select your item's lot number and serial number.
5. In the **Qty** box, type the quantity of the item you want to transfer.
6. In the **Final Location** list, select the location you want to transfer your item to.
7. Click **Insert**.

To link your transfer to a kit project and stage do the following steps:

8. Click **Menu**, and then click **Link to kit project**.
9. In the **Project** list, select a project.
10. In the **Stage** list, select a stage.
11. Click **Select**.

Create a Sales Order

1. On the **SIMMS Mobile** start page, click **Sales Orders**.
2. Click **New SO**.
3. Click **Go**.
4. Select a customer, and then click **Select**.
5. In the **Doc#** text box, type a document number.
6. In the **Location** list, select a location.
7. In the **Item** list, select an item.
8. In the **Quantity** box, type the quantity of the item you are selling.
9. Click **Insert**.
10. A dialog appears prompting you to confirm that you want to add your item to your sales order, click **Yes**.

To add additional details to your sales order do the following steps:

11. In the **Ship To** list, select a new ship-to address for your sales order.
12. In the **Contact** list, select a contact.
13. In the **Agent** list, select the agent responsible for this sales order.
14. In the **Comment** text box, type a comment.
15. Click **OK**.
16. After you have added all the items to your sales order and any additional information, click **Menu**, and then click **Save Sales Orders**.

Pick Orders

1. On the **SIMMS Mobile** start page, click **Order Picking**.
2. Choose one of the following options:
   - **Invoice**
   - **Sales Order**
3. In the **Order#** list, select the order you want to pick.
4. In the **Location** list, select the location.
5. In the **Item** list, select the item.
6. If required, in the **MFG** list, select your item's lot number.
7. Click **Go**.
8. In the **Pick Qty** box, type the quantity of the item you want to pick.
9. Click **Update**.

Create an Invoice

1. On the **SIMMS Mobile** start page, click **Issue**.
2. Click **Go**.

   A list of your customers appears.
3. Select a customer, and then click **Select**.
4. In the **Doc#** text box, type a document number.
5. In the **Location** list, select a location.
6. In the **Item** list, select the item you want to invoice.
7. If required enter the item's lot number, expiration date, serial number, or user serial number in the appropriate boxes.

8. In the **Quantity** box, type the quantity of the item you want to invoice.
9. Click **Insert**.

Add an Inventory Item

To create an item you need to enter its description, item code, category and unit of measure, all other details are optional.

1. On the **SIMMS Mobile** start page, click **Menu**, click **View**, and then click **Items**.
2. Click **Menu**, and then click **New Item**.
3. In the **Description** text box (top), type your item's description.
4. In the **Item Code** text box, type your item's code.
5. In the **UPC** text box, type your item's UPC.
6. In the **Category** list, select your item's category.
7. In the **UM** list, select your item's unit of measure.
8. In the **Price** box, type the amount you sell this item for.
9. In the **Cost** box, type the amount you pay for this item.
10. In the **Volume** box, type your item's volume.
11. In the **Weight** box, type your item's weight.
12. In the **Comment** text box, type a comment.
13. Click **Save New Item**.

Viewing Data on Your Mobile Device

View Documents

- On the **SIMMS Mobile** start page, click **Menu**, click **View**, and then click **Documents**.

Vies Transfers

- On the **SIMMS Mobile** start page, click **Menu**, click **View**, and then click **Transfers**.

View Items

1. On the **SIMMS Mobile** start page, click **Menu,** click **View**, and then click **Items**.
2. Click **Go**.
3. To view an item's details, click **Menu**, and then click **Detail**.

4. To view the quantity of the item you have on-hand and their locations, click **Menu**, click **View**, and then click **Stock**.

View Customers

1. On the **SIMMS Mobile** start page, click **Menu,** click **View**, and then click **Contacts**.
2. Click **Go**.
3. To view a customer's details, select the customer, and then click **Select**.

View Mobile Screen on Your Desktop

These instructions are for Windows 7.

1. On your computer, click the **Start** button, click **All Programs**, open the **Remote Display Control** folder, and then click **Remote Display Control Host**.
2. On your mobile device, click the **Start** button, click **Programs**, and then click the **cerdisp** icon.
3. Click **OK**, click **Connect**, and then click **OK**.

   The Windows Mobile Device screen appears on your computer.

Transferring Data

Transfer Data from Your Mobile Device

1. On the **SIMMS** Mobile start page, click **Menu,** click **Batch**, and then click **Prepare for Download**.

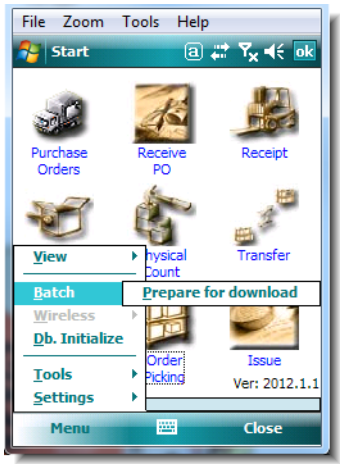

Figure 2: Prepare data to download to SIMMS.

2. A dialog appears asking you to confirm that you want to synchronize your download with SIMMS. Click **OK**.
3. To synchronize your data, in SIMMS, open the **Warehouse** menu, open the **Mobile Devices** submenu, and then click **Windows Mobile**.
4. Click **Connect**, and then click **From Device**.

   The data you downloaded from your SIMMS Mobile is listed on the appropriate tabs in the window.
5. Return to **SIMMS Mobile** and do one of the following tasks:
   - To confirm your download was successful click **Yes**.
   - If your download was not successful, click **No**.

Transfer Data to Your Mobile Device

1. Start **SIMMS**, open the **Warehouse** menu, open the **Mobile Devices** submenu, and then click **Windows Mobile**.
2. Click **Connect**.

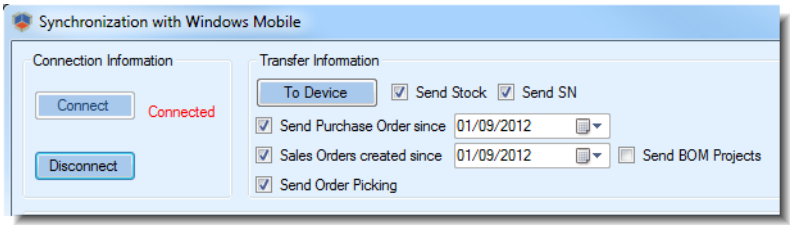

Figure 3:Options for transferring data to your mobile device.

3. Select any of the available options, and then click **To Device**.

Table 1: Options

Option	Explanation
Send Stock	Select this option to send your stock information to SIMMS Mobile.
Send SN	Select this option to send your serial number information to SIMMS Mobile.

Table 1: Options

Option	Explanation
Send Purchase Order since	Select this option to send your purchase orders to SIMMS Mobile. Only purchase orders dated on or after the adjacent date are sent to your mobile device.
Sales Orders created since	Select this option to send your sales orders to SIMM Mobile. Only sales orders dated on or after the adjacent date are sent to your mobile device.
Send BOM Projects	Select this option to send your BOM Project information to SIMMS Mobile. You will need this information if you want to link a transfer to a specific project and stage.
Send Order Picking	Select this option to send your oder picking information to SIMMS Mobile.