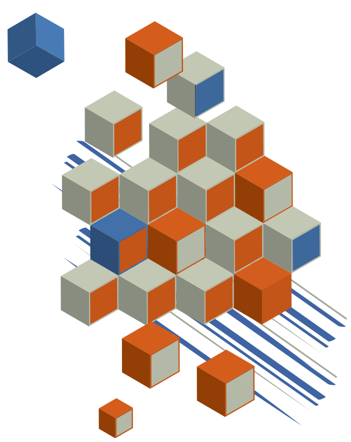
SIMMS Setup Guide II

SIMMS Inventory Management Software 7.3

July 22, 2010



Contents

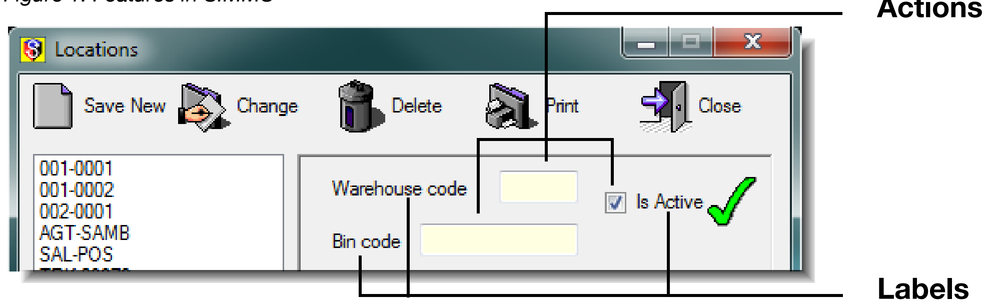
Introduction to SIMMS Setup Guide II

What this Setup Guide Covers:

- Global Settings.

How to Use this Setup Guide. This guide is organized with tables. The **Label** column in a table lists the names of the features available to you. The **Action** column in a table contains instructions on what action you take to enable a feature. The organization of a table resembles how a typical feature appears in SIMMS. See Figure 1.

Figure 1: Features in SIMMS



There is a column in the table with a check mark (✓) in its header. If you print out this document, check off the changes you have made during your setup. In this way you can keep track of the changes you have made to SIMMS.

Note: *Restart SIMMS after you finish making your changes. This ensures your changes take effect.*

Global Settings

On the **Setup** menu, point to **Settings**, and then click **Global Settings**. The Setup - Global Settings dialogue box opens.

General (tab)

Warning: *Do not change your inventory costing method once you have set it and begun using SIMMS.*

Table 1: Global Settings—General (tab)

Label	Action	✓
Show Comment Window	Click to have a comment window display after changes are made to an existing transaction. You can then type in the comment window the reason why changes were made to the transactions.	
Time out SQL Commands (seconds)	Type the time, in seconds, to run an SQL command before the SQL command times out. The default setting is 30 seconds.	
Expiration Date - advance warning of	Type the number of days prior to an item's expiration date you would like to receive an alert. An item's expiration date is entered in the Item Manager.	
Standard ... Weighted Average Cost	Choose one of the following inventory costing methods for your company: • **Standard** • **FIFO** • **LIFO** • **Average** • **Weighted Average Cost**	

Table 1: Global Settings—General (tab)

Label	Action	✓
Prices	Type the number of decimal places to which you want prices rounded off.	
Prices for Customer Printouts	Type the number of decimal places used for prices on customer printouts (quotes, sales orders, invoices, receipts, purchase orders).	
Quantities	Type the number of decimal places to which you want quantities rounded off.	
Maximum	Type the maximum value for a price (0=unlimited).	

Price Calculations (tab)

Table 2: Global Settings—Price Calculations (tab)

Labels	Action	✓
Quantity Volume Discounts	Click to calculate price discounts by quantity volume. You manage your quantity volume discounts in the Customer Quantity Volume Discounting window.	

Table 2: Global Settings—Price Calculations (tab)

Labels	Action	✓
Standard Price ... Pre-calculated Average Price	If you have selected Quantity Volume Discounts, you can choose one of the following pricing methods: • **Standard Price** • **Pre-calculated FIFO Price** • **Pre-calculated Weighted Average Price** • **Pre-calculated Average Price** • **Pre-calculated LIFO Price**	
Use Markup Percent	Click to use a markup percent, and then type the percentage to use. (This option is not available if you have chosen Standard Price as your pricing method).	
Round Price to__Decimals	Click to round off the discount price, and then type in the box the number of decimal points to which the price is rounded. (This option is not available if you have chosen Standard Price as your pricing method).	
Item Price Levels	Click to set your discount prices by price levels. You can set up to 12 different discount price levels for each item. You define an item's price levels at Inventory> Item Manager> Prices tab.	
Add Landed Cost to Sales Price	Click to add landed cost to an item's standard price. With this feature, in the Price Markup dialogue box you can add fixed costs, and a percentage markup to an item's standard price. The Price Markup dialogue box is at Inventory> Item Manager> Prices> Price Variables.	

Table 2: Global Settings—Price Calculations (tab)

Labels	Action	✓
Use the Item Promotional Price	Click to use an item’s promotional price. The promotional price overrides any discounts that are calculated with Quantity Volume Discounting, Dollar Volume Discounting, and Price Levels. You set an item’s promotional on the Item Manager.	
Use Dollar Volume Discounts	Click to use price discounts by dollar volume. You setup dollar volume discounts at Setup> Pricing, Discount, Costs> Prices - Dollar Volume Discounting.	
Update Standard Cost with Actual Cost	Click to have SIMMS update your standard cost with the actual cost you last paid for an item. By default, you would need to manually change an item’s standard cost. You can view an item’s standard cost and actual cost at Inventory> Item Manager> Prices tab.	

Reporting (tab)

Table 3: Global Settings—Reporting (tab)

Label	Action	✓
Include Serial Number(s)	Click to include serial numbers in your transaction reports (invoice, receipt of goods, picking list, packing list etc.). You manage serial numbers at Inventory> Serial Numbers> Serial Number Manager.	
Include Item Details	Click to include item details in your reports. You can then add item details (comments) to any individual line item in a transaction window.	

Table 3: Global Settings—Reporting (tab)

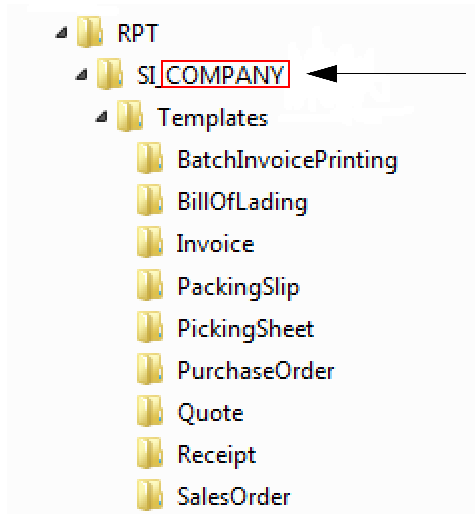
Label	Action	✓
Include Extended Descriptions	Click to include extended descriptions in your transactions and reports. You add extended descriptions at Inventory> Item Manager> Edit> Extended Descriptions.	
Include Kit Components	Click to include kit components in your reports. By default only the parent name of a kit appears in reports. If you choose this option, your reports include the parent name of the kit and the kit's highest level of components.	
Include All Level of Kit Components	Click to include all levels of kit/subkit components in your reports. By default only the parent name of a kit appears in reports. If you choose this option, your reports include the parent name of a kit, its components, and all subassembly components.	
Include Item Images in Sales Transaction Reports	Click to include item images in sales transaction reports. You upload an item's image at Inventory> Item Manager> Tools> Pictures. By default, the last image uploaded into the Item Manager is the image that displays in your transactions. For the best results, your images should be 4 cm x 4cm in size (1.5" x 1.5").	
Reports	To change the default printing options for a report, select the name of the report from the **Reports** list, and then select either **Print**, **Do Not Print**, or **Ask for Printing**.	
Use External Editable Reports Instead of Internal Reports	Click to use external editable reports. You need to edit pre-existing reports in Crystal Reports, and then store them in C:\Program Files\KCSI\SIMMS\RPT folder.	

Table 3: Global Settings—Reporting (tab)

<table>
<tr><th>Label</th><th>Action</th><th>✓</th></tr>
<tr><td>Use Report Templates, if available</td><td>

Click to use report templates. With this feature, you can assign custom reports to specific customers or vendors.

If you select this option SIMMS creates a group of folders under **C:\Program Files\KCSI\SIMMS\RPT**. See Figure 2.



SIMMS automatically names this folder with the name of your company.

Figure 2: Template folder structure

1. Edit SIMMS default reports in Crystal Reports. Place the edited reports in the appropriate folders under the **Templates** folder.

   You may find it helpful to add the name of your contact to the report's file name. This helps you to identify which report is for which contact.
2. In the **Contact Manager,** click the **Template** tab. For each report type (Invoice, Quotes, Sales Orders, etc.), select from the lists the customized report for your contact.

</td><td></td></tr>
</table>

Purchasing (tab)

Table 4: Global Settings—Purchasing (tab)

Label	Action	✓
Ignore on P/O Quantities when Reordering	Click to have SIMMS ignore quantities on existing purchase orders when calculating items for reorder. You set an item's reorder point at Inventory> Item Manager> Tools> Item Reorder.	
Include Reserved Quantity in Item Reorder Point Calculations	Click to have SIMMS include reserved quantities when it calculates items for reorder. You set an item's reorder point at Inventory> Item Manager> Tools> Item Reorder.	
Include Back ordered Quantity in Item Reorder Point Calculation	Click to have SIMMS include back ordered quantities when it calculates items for reorder. You set an item's reorder point at Inventory> Item Manager> Tools> Item Reorder.	
Show Quick Payment Screen after Saving a Receipt	Click to show the Quick Payment window after saving a receipt of goods. In the Quick Payment window, you can process a payment for an item immediately. Consequently, there is no need to process the payment through accounts payable.	

Table 4: Global Settings—Purchasing (tab)

Label	Action	✓
Auto AP Invoice... No Auto AP Invoice	Select one of the following for accounts payable invoices: • **Auto AP Invoice** - after saving a receipt of goods, an accounts payable invoice is automatically generated. • **Prompt for Auto AP Invoice** - after saving a receipt of goods, a dialogue box opens with the option to automatically generate an accounts payable invoice. • **No Auto AP Invoice** - an accounts payable invoice is never automatically generated. After saving a receipt of goods, you need to manually create an accounts payable invoice.	
Update when "Last Cost" is Changing	Click to have SIMMS update an item's cost price with the last price you paid for the item. By default, you would need to manually change an item's cost price in the Item Manager.	
Use VPN Costs when Available and Warn if Vendor has No VPN for selected Item	Click to use the vender part number (VPN) costs, and to display a dialogue box, alerting you when the vendor has no VPN. The VPN cost overrides the cost assigned to an item in the Item Manager. You assign VPN costs and a VPN for an item at Inventory> Item Manager> Tools> Vendor Part Number.	
Use Auto Receive for Receipts and Transfers	Click to have receipts and transfer of goods marked received when they are saved. By default, you would manually confirm the receipt of goods in Modules> Purchasing> Receipt Confirmation. You manually confirm a transfer of goods in Modules> Transfers> Transfer Confirmation.	

Table 4: Global Settings—Purchasing (tab)

Label	Action	✓
Only Show VPN Items when Purchase	Click to show only items with a vendor part number (VPN) in the Item list when you create a purchase order. If you select this option, SIMMS filters your item list and displays only items with a VPN for your selected vendor. You assign a VPN for an item at Inventory> Item Manager> Tools> Vendor Part Number.	
Last/Preferred Vendor Static	Click to prevent SIMMS from changing your last/preferred vendor for an item. By default, SIMMS updates your last/preferred vendor with the vendor from which you last purchased the item. You can view the last/preferred vendor for an item at Inventory> the Item Manager> Primary Info tab.	
Calculate Discounts/ Interest (Overdue) Based on Net Total	Click to calculate the discounts and overdue interest for purchases on the net total. By default SIMMS calculates the discount and overdue interest of a purchase on the gross total. You enter vendor terms at Contact Manager> Vendors> Advanced tab.	
Number of Invoices per Cheque	Type in the box the number of invoices a user can pay per cheque.	

Table 4: Global Settings—Purchasing (tab)

Label	Action	✓
PO number -> Doc. Number ... Increment Doc. Number	Choose one of the following: • **P/O number -> Doc. Number** - when you import a purchase order into a receipt of goods, the purchase order number is also used as the document number for the receipt of goods. • **Doc. Number -> Doc. Number** - when you import a purchase order into a receipt of goods, the purchase order's document number is also used as the document number for the receipt of goods. • **Increment Doc. Number** - when you import a purchase order into a receipt of goods, the purchase order number is incremented by one, and then used as the document number for the receipt of goods.	
Import Approved PO Only	Click to import only authorized purchase orders into receipts. SIMMS displays a dialogue box alerting the user that the purchase order is not authorized, and prevents the importing of the purchase order. You approve a purchase order at Modules> Purchasing> Waiting for PO Authorization.	
Use Budgets - Purchase Order Authorization	Click to require authorization for purchase orders. When a purchase order is submitted the person who is designated to authorize purchase orders is alerted.	
Enforce Budget Limits in PO and Receipts	Click to enforce budget limits on purchase orders and receipts. You set budget limits in the Budget Detail window when setting up your purchase order budget limits.	

Table 4: Global Settings—Purchasing (tab)

Label	Action	✓
PO Submitted - All Approvers Alerted	Click to send alerts to Approvers when a purchase order is submitted.	
Send E-mail	Click if you would like to also send an e-mail to the Approver when a purchase order is submitted.	
Approver Declines an Order - Submitter Review	Click to have the Submitter alerted that a purchase order is declined and returned for review. The Submitter reviews the Approver’s comments, adjusts the purchase order, and submits the revised purchase order.	
Send E-mail	Click if you would also like to send an e-mail to the Submitter when a purchase order is declined and returned for review.	
Order Approved - Send Alert	Click to send an alert to the Authorizer and the Submitter when a purchase order is approved.	
Send E-mail	Click if you would like to also send an e-mail to the Authorizer and the Submitter when a purchase order is approved.	
Authorizer Declines an Order - Approval Review	Click to have the Approver review the declined purchase order. The Approver reviews the Authorizer’s comments, adjusts the purchase order, and submits the revised purchase order.	
Send E-mail	Click if you would also like to send an e-mail to the Approver.	

Table 4: Global Settings—Purchasing (tab)

Label	Action	✓
Order Authorized - Send Alert	Click to send an alert to the Approver and Submitter when a purchaser order is authorized.	
Send E-mail	Click if you would also like to send an e-mail to the Approver and Submitter when a purchase order is authorized.	
Order Shipped - Send Alert	Click to send an alert to the Authorizer, Approver, and Submitter when a purchaser order is shipped.	
Send E-mail	Click if you would also like to send an e-mail to the Authorizer, Approver, and Submitter when an purchase order is shipped.	
Order - Received - Send Alert	Click to send an alert to the Authorizer, Approver, and Submitter when the item ordered is received.	
Send E-mail	Click if you would also like to send an e-mail to the Authorizer, Approver, and Submitter when an order is received.	
Use GL Definition for Fiscal Year	Click to use the general ledger (GL) definition for a fiscal year. You define the GL definition for the fiscal year during the setup of the GL. You cannot change the GL definition for your fiscal year after you define it during the GL setup.	

Apparel (tab)

Table 5: Global Settings—Apparel (tab)

Label	Action	✓
Scan UPC as UPC + Manufacturer Lot	If you are scanning your barcodes during sales, click to have SIMMS append the UPC number to the manufacturer's lot code, and display the combined code as the manufacturer's lot code in your transactions and Point of Sales (POS).	
Use Apparel Matrix for Issues and Sales Orders	Click to display the Apparel Matrix when creating issues and sales orders. You can then use the Apparel Matrix to select specific styles, colors, and sizes of apparel for your issues and sales orders.	
Print Apparel Matrix (SO and Invoice)	Click to print the style, color, and size details of apparel items on sales orders and invoices. You define the style, color, and size of apparel items in the Apparel Matrix.	
Use apparel Costs/ Prices	Click to use apparel cost/prices for sales and purchases. If selected, a dialogue box opens with the option to use the apparel cost/prices for an item. The apparel cost/ price replaces the standard or discount price for an item. You enter the apparel cost/price in the Apparel Costs/Prices window.	

Transaction Generic (tab)

Table 6: Global Settings—Transaction Generic (tab)

Label	Action	✓
Increment Document Number	Click to increment your document numbers by one over the last saved document. For example, if your last saved purchase order has the document number 101, your new purchase order will have the document number 102.	
Transaction Screen - Clear Text Box 5 after every new line item inserted	Text Box 5 is a user defined field. Text box 5 displays in your transaction grids and prints in your reports. Click to have this text box cleared for every new line item.	
Alert when Stock is insufficient	Click to have a dialogue box display an alert when there is insufficient stock on hand for a transaction.	
Find Transaction Lookup - time Frame of__months	Type the number of months back you want SIMMS to search for transaction documents. If for example you choose 1 month, when you search for transaction documents SIMMS retrieves only those transaction documents from the preceding month.	
Use Sequence Number	Click to assign sequence numbers to line items. SIMMS numbers each line item in a transaction window. You can then sort and search line items by their sequence numbers.	

Table 6: Global Settings—Transaction Generic (tab)

Label	Action	✓
Disable Order Number in Transaction Manager	Click to disable the order number in the Transaction Manager. The order number is dimmed, and cannot be edited.	
Uncommitted Transactions - delete after __ day(s)	Type in the box the number of days you want to keep uncommitted transactions. After this period, SIMMS automatically deletes the uncommitted transactions. An uncommitted transaction is a transaction that is incomplete. You need to complete and save a transaction before you can process it further. View uncommitted transactions at Inventory> Uncommitted Transaction Listing.	
Selecting Manufacturer Lots	Choose one of the following: • **By Entry Order** - for sales orders and issues, SIMMS automatically assigns to an item the manufacturing lot with the oldest entry date. • **Manually** - for sales orders and issues, you manually assign to an item the appropriate manufacturer lot. • **By Expiration Date** - for sales orders and issues, SIMMS automatically assigns to an item the manufacturer lot with the oldest expiration date.	
Move Remaining BO Quantity to the New Invoice when Filling BO	Click to add unfilled items of a back order to a new invoice. In the Back Order Manager, you can create a new invoice based on the back order quantities of an existing invoice. Consequently, there is no need to reopen an invoice to process its back order quantities.	

Table 6: Global Settings—Transaction Generic (tab)

Label	Action	✓
Shipping Manager - Show Invoices Only	Click to display only invoices in the Shipping Manager. By default, both invoices and sales orders display in the Shipping Manager.	
Use Detailed Discount Grid	Click to use the detailed discount grid in the Quotes Manager. This feature is designed to track the type of discounts applied to an items standard price. There are three types of discounts: quantity, dollar, and sales agent discounts.	
By Synapse	Click to process credit cards through Synapse Credit Card Gateway. Enter your Gateway Account ID and Gateway Password in the text boxes.	

Accounting (tab)

The following options are for users of SIMMS General Ledger Feature.

Table 7: Global Settings—Accounting (tab)

Label	Action	✓
Allow Editing of Invoices and Receipts	Click to allow editing of invoices and receipts.	
Allowed Number of Days	Type in the box the number of days after which invoices and receipts can no longer be edited.	

Table 7: Global Settings—Accounting (tab)

Label	Action	✓
General Ledger Integration	Choose one of the following: • **Item priority** - SIMMS enters the credit or debit for a transaction to the item's sales account and cost of sales account. You set an items sales account and cost of sales account in the Item Manager. • **Customer priority** - SIMMS enters the credit or debit for a transaction to the customer's sales account and cost of goods account. You set a customer's sales account and cost of sales account in the Customer's GL Defaults window.	

Commissions (tab)

Table 8: Global Settings—Commissions (tab)

Label	Action	✓
Calculate Manually	Click to calculate commissions manually. You calculate commissions in the Commission Manager.	
Choose Frequency of Alert	If you are calculating commissions manually, define how often you want SIMMS to alert you to calculate commissions.	
Calculate Automatically	Click to have SIMMS calculate commissions automatically. Consequently, the Calculate button is unavailable in the Commission Manager.	

Table 8: Global Settings—Commissions (tab)

Label	Action	✓
Automatic Calculations will Occur Every	If SIMMS is automatically calculating commissions, define how often you want SIMMS to calculate commissions.	
Return Records	Click to include return records in the commission calculations.	
RMAIN records	Click to include RMAIN records in the commission calculations.	
RMAOUT Records	Click to include RMAOUT records in the commission calculations.	
Manual Credit Records	Click to include manual credit records in the commission calculations.	
ZERO Invoice Records	Click to include ZERO invoice records in the commission calculations.	

Table 8: Global Settings—Commissions (tab)

Label	Action	✓
Accounts Receivable, Transactions	Choose one of the following methods to calculate commissions: • **Accounts Receivable** - commissions are based on paid sales, not on all transactions. • **Transactions** - commissions are based on all transactions including those that have not been paid. If you choose to calculate commissions by Accounts Receivable, you can use all available templates: Maximum Values, Clients, and Items. If you choose to calculate commissions by Transactions, you can only use the Maximum Values, and Clients templates. You create commission templates in the Commission Template Manager. You assign these templates to agents in the User Manager.	

Sales (tab)

Table 9: Global Settings—Sales (tab)

Label	Action	✓
Show Agent in Invoice/ SO List	Click to display the agent's name on invoices and sales orders listed in the Find Transaction window.	
Authorization for Editing Quote	Click to require authorization for editing quotes. If selected, the person who originally made the quote must authorize any editing of the quote.	

Table 9: Global Settings—Sales (tab)

Label	Action	✓
Negative Inventory not Allowed	Click to prevent negative inventory. SIMMS prevents transactions that generate negative inventory.	
Use Pro Forma Invoicing/SO	Click to use pro forma invoicing and sales orders. You can print a pro forma invoice based on your sales order. You can also import a pro forma sales order into an invoice. Your invoice will then have "PRO FORMA, DO NOT MAIL" across the top.	
Show Quick Payment Screen after Saving an Invoice	Click to show the Quick Payment window after saving an invoice. In the Quick Payment window, you can process a customer's payment immediately. Consequently, there is no need to process the payment through accounts receivable.	
Sales Agents are Mandatory in Transactions	Click to require a sales agent to be assigned to transactions. If a sales agent is not assigned, a dialogue box opens requesting that a sales agent be assigned to the transaction.	
Use Default Item Locations when Importing Quotes	Click to use an item's default location when importing a quote into a sales order. This prevents you from changing the location of an item in the sales order. This ensures the item is pulled from the location assigned in the quote.	
Prompt for Invoice after Save Sales Order	Click to display a dialogue box with the option to generate an invoice after you save a sales order.	
Back Order Items have Value on SO	Click to include the value of back ordered items on a sales order.	

Table 9: Global Settings—Sales (tab)

Label	Action	✓
S/O Number -> Doc. Number ... Increment Doc. Number	Choose one of the following: • **S/O number -> Doc. Number** - when you import a sales order into an invoice, the sales order number is used for the invoices document number. • **Doc. Number -> Doc. Number** - when you import a sales order into an invoice, the sales order document number is used for the invoices document number. • **Increment Doc. Number** - when you import a sales order into an invoice, the sales order number is incremented by one, and then used as the document number for the invoice.	
Import Approved SO Only	Click to import only approved sales orders into invoices. A dialogue box opens, alerting the user that the sales order is not approved, and prevents the importing of the sales order.	
Print Sub report with SO Record with BO	Click to display a list of the back ordered items and their quantities on your invoice. The sales order needs to be imported into the invoice for this feature to work.	
Sale Price in POS is Editable	Click to edit sales prices in your POS. By default, you cannot change the price of an item in your POS. An item's price is set in the Item Manager.	
Scan serial Number in POS Module	Click to scan serial numbers into your POS.	

Table 9: Global Settings—Sales (tab)

Label	Action	✓
Use BRANCH_LOCATION in POS for Document Number	Click to use an item's branch location as the document number in your POS.	
Disable Discounts in POS	Click to disable discounts in your POS.	
Show Customer's Total Credits and Balances in their Default Currencies in Contact Manager	Click to show in the Contact Manager the customer's total credits and balances in their default currencies. For this feature to work, it is required that all your transactions with the client are in their default currencies. If you use multiple currencies for a client, the client's credit and balances are shown in your default currency. You set your default currency in the Currency Manager. A customer's default currency is set in the Contact Manager.	

Automation (tab)

Table 10: Global Settings—Automation (tab)

Label	Action	✓
Integer-based, Percentage-based	Choose one of the following: • **Integer-based** - SIMMS compares your on-hand quantity to an integer value. • **Percentage-based** - SIMMS compares your on-hand quantity to a percentage.	
Sales Orders (Aggregate)	Type a number for your fill threshold in the box. SIMMS interprets this number as an absolute numeric value, or a percentage, depending on what you chose for your auto-fill method. For example, if you chose percentage based as your auto-fill method, and set the Sales Orders (Aggregate) at 80%, SIMMS compares your quantity on hand with the quantity needed to fill all line items for the sales order. If the quantity on-hand is greater than 80% for all line items, SIMMS sets a fill quantity for the sales order. If the quantity is less than 80% SIMMS sets the fill quantities to zero (0).	

Table 10: Global Settings—Automation (tab)

Label	Action	✓
Sales Orders (Line Items)	Type a number for your fill threshold in the box. SIMMS interprets this number as an absolute numeric value, or a percentage, depending on what you chose for your auto-fill method. For example, if you chose integer based as your auto-fill method, and set the Sales Orders (Line Items) at 10, SIMMS compares your quantity on hand with the quantity needed to fill each line item for the sales order. If the quantity on-hand is greater than 10 for a line item, SIMMS sets a fill quantity for the sales order. If the quantity is less than 10 SIMMS sets the fill quantities to zero (0).	
Quotes Expire after__(days)	Type in the box the number of days after which a quote expires. If you want to delete quotes once they expire, click **Automatically Delete**.	
Sales Order Expire after__(days)	Type in the box the number of days after which a sales order expires. If you want to delete sales orders once they expire, click **Automatically Delete**.	
Automatically Delete Once Used	Click to delete quotes and sales orders after they are imported into documents. You can import a quote into a sales order and invoice. You can import a sales order into an invoice.	
Pop up Reminder of Credit Due to Customer	Click for a reminder when a credit is due a customer. When a customer is selected for a transaction, and the customer is owed a credit, a dialogue box opens alerting you that a credit is due the customer.	

Table 10: Global Settings—Automation (tab)

Label	Action	✓
Pop up Reminder of Customer Past Due	Click for a reminder when a customer is past due on a payment. When a customer is selected for a transaction, and the customer is past due on a payment, a dialogue box opens alerting you that the customer is past due on a payment.	
Use Autoship for Invoices	Click to use autoship for invoices. Your invoices are marked shipped after you save them. Consequently, there is no need to manually confirm the shipment of an item in the Shipping Manager.	
Use Auto Increment for Way Bill #	Click to automatically increment the way bill number. Then define the **Way Bill# Format** (Prefix, Separator, Increment). If you choose this feature, SIMMS automatically generates a way bill number and increments the number for every new way bill. By default, you would need to manually enter a way bill number in the Shipping Manager.	
Default Required Date for Purchase Orders	Type the number of days after which a purchase order expires. If you want to delete purchase orders once they expire, click **Automatically Delete**.	

Table 10: Global Settings—Automation (tab)

Label	Action	✓
Automatically Calculate Freight	Click to calculate freight automatically, and then click **Net Total**. The Freight Net Total Calculation dialogue box opens. Choose one of the following: • **Based on List Price** • **Based on List Price Less Quantity Discount** • **Based on List Price Less Quantity Discount and Dollar Volume Discount** • **Based on List Price Less Quantity Discount, Dollar Volume Discount, and Sales Rep Discount** Click **OK**, and then type in the boxes the appropriate numbers for SIMMS to automatically calculate your freight cost.	
Price Fluctuation Alerting	Click for price fluctuation alerts, and then choose one of the following: • **Amount Difference of Standard Price**. Type the dollar value in the box. • **Percentage Difference of Standard Price**. Type the percentage value in the box. Recipients of price fluctuation alerts are assigned in the SIMMS Server Agent.	

Table 10: Global Settings—Automation (tab)

Label	Action	✓
Cost Fluctuation Alerting	Click for cost fluctuation alerts, and then choose one of the following: • **Amount Difference of Standard Cost**. Type the dollar value in the box. • **Percentage difference of Standard Cost**. Type the percentage value in the box. Recipients of cost fluctuation alerts are assigned in the SIMMS Server Agent.	

Kitting BOM (tab)

Table 11: Global Settings—Kitting (BOM)

Label	Action	✓
Kit Building Create an Auto-generated Production Lot	Click to have SIMMS automatically generate a production lot code for a kit. The production lot code that SIMMS generates is a unique identifier that consists of the current date and an incremented number.	
Phantom Kit - Use Default Item Location for Phantom Kits	Click to use the default item location for phantom kits. An item's default location is assigned in the Item Manager.	

Item & Stock (tab)

Table 12: Global Settings—Item & Stock

Label	Action	✓
Use Standard Quick Stock Window ... Use Tree Quick Stock Window	The Quick Stock window lists your inventory items. There are up to 16 available columns of information for your inventory items: **Branch, Item Code, Item Description, Category, Location, On Hand, On Hold, RMA Qty, In Transit, Reserved, BO Qty, On PO, Manu. Lot, Expiration Date, Text Box 5.** Choose one of the following Quick Stock windows: • **Use Standard Quick Stock Window -** displays all available columns in the Quick Stock window. • **Use Simplified Quick Stock Window -** displays the most used columns in the Quick Stock window: **Branch Item Code, Item Description, Location, On Hand, On Hold, RMA Qty In Transit, Manu. Lot, Expiration Date, Text Box 5.** • **Use Tree Quick Stock Window -** displays all available columns in the Quick Stock window, plus a line item breakdown of all receipt of goods, transfers, adjustments, and returns for an item. With this additional information you can trace how the on-hand quantity for an item was achieved.	
Sort Quick Stock Window by Item Code	Click to sort the items in the Quick Stock window by the item code. By default, items in the Quick Stock window are sorted by the item description.	

Table 12: Global Settings—Item & Stock

Label	Action	✓
Retain Zero Stock	Click to have your Stock Reports display items currently with zero quantity. By default, SIMMS displays only items that have a quantity greater than zero in your Stock Reports.	
Exclude "Next Month(s)" Transactions with Stock Activity from Inventory Valuation Report	Click to exclude next month's transactions in your Inventory Valuation Report. The Inventory Valuation report is at Inventory>Operational Reports	
Split Item Lists	Click to split your item lists, and then type in the box the number of items to display per page. To make your item lists manageable, use this option if you have more than 1000 items in a category.	
Unit of Measure of Item for Weight	Type in the box the unit of measure used for weight. For example, Kg or lb.	
Associate Unique UPC with each Unique UM Related to the Item	Click to have a unique UPC code for each unit of measure associated to an item. Choose one of the following: • **Manage it Automatically (UPC = Item Code + UM Related)** • **Manage it Manually**	
Use Item Description as Unique	Click to enforce unique description for each item. If selected a dialogue box opens, alerting you if a description for an item is duplicated.	

Table 12: Global Settings—Item & Stock

Label	Action	✓
Use Custom UPC (used in the in-store marketing of variable weight non-UPC type items such as meat)	Click to use a custom UPC for variable weight items without a UPC. For scaled items, your label printer prints a UPC code based on the weight of the item and the standard price of the item. For this feature to work, your item code and UPC code for the item must be the same. The item code and UPC code are set in the Item Manager	

Serial Numbers (tab)

Table 13: Global Settings—Serial Numbers

Label	Action	✓
Unique to Inventory, Unique to Item, or Not Unique	Choose one of the following for serial numbers: • **Unique to Inventory** - a serial number that is unique throughout SIMMS. • **Unique to Item** - a serial number that is unique to an item. With this option, you can also assign the same serial number to a different item. For example, a polo shirt has the serial number “456”. You can assign the same serial number “456” to blue jeans, but not to another polo shirt. • **Not Unique** - a serial number that is not unique to any item, or anywhere in inventory.	

Table 13: Global Settings—Serial Numbers

Label	Action	✓
Serial Number Mandatory for Issues, Transfers, Kit Components, and Stock Adjustments	Click to enforce the mandatory assignment of serial numbers for issues, transfers, kit components, and stock adjustments. This feature ensures the serial number for an item is entered into issues, transfers, kit components, and stock adjustments.	
Serial Number Mandatory at Receiving, Kit Building	Click to enforce the mandatory assignment of serial numbers for receipt of goods and kit builds. This feature ensures a serial number is assigned to items on receipt of goods and kit builds.	
Use User SNs	Click to assign user-defined serial numbers to items. User serial numbers are an additional identifier that helps you manage your inventory.	
Unique to Inventory, Unique to Item, or Not Unique	Choose one of the following for user serial numbers: • **Unique to Inventory** - a user serial number that is unique throughout SIMMS. • **Unique to Item** - a user serial number that is unique to an item. But, You can also assign the same serial number to a different item. For example, a polo shirt has the serial number “456”. You can assign the same serial number “456” to blue jeans, but not to another polo shirt. • **Not Unique** - a user serial number that is not unique to any item, or anywhere in inventory.	
Include User SN(s) when Printing	Click to include user serial numbers in printed documents.	

Table 13: Global Settings—Serial Numbers

Label	Action	✓
Automatically Increment User SN	Click to automatically increment user serial numbers by one for each item subsequently added into SIMMS.	
Disable User SN Edit for SKU Users	Click to prevent the editing of user serial numbers in the Serial Number Manager. With this feature you can still generate user serial numbers, but you cannot edit them.	

Advanced (tab)

Table 14: Global Settings—Advanced

Label	Action	✓
Show Barcode Interface after Receiving Apparel Items	Click to show the Barcode interface when receiving apparel items into SIMMS.	

Table 14: Global Settings—Advanced

Label	Action	✓
Generate Barcodes Using the First Serial Number and Quantity	Click to generate a barcode for each line item of a receipt of goods. SIMMS generates the barcode based on the total quantity of the line item and the first serial number from the sequence of serial numbers for the items. For example, you have a receipt of goods with a line item of 50 hammers. You generate 50 serial numbers for your hammers. The first serial number in your sequence of 50 serial numbers is 45678. The barcode you generate is 5045678. The total quantity (50) is appended to the first serial number (45678) for your hammers.	
Use Authorize.NET to Process Credit Card Receipts	Click to process credit card receipts through Authorize.NET.	
Create POs in Draft Mod for Reordering Purchase Order and RFQ Sessions	Click to create a draft version of a purchase order when using the Reordering Purchase Orders or RFQ Creation features.	
Do Not Allow the Parent Item in a Phantom Kit to be Selected in Sales Order Picking and Fulfillment Manager Forms	Click to prevent the parent item in a phantom kit from appearing in the Fulfillment Manager and the Pick Report. You generate the Pick Report through the Fulfillment manager.	

Table 14: Global Settings—Advanced

Label	Action	✓
Sales Printing Documents - Display zero price as	Type the characters or phrase you would like to replace zero (0) with in your printed sales documents. For example, you could replace zero (0) with Free, No Charge, or $0.	
Hide "Account Number" Field in Contact Manager	Click to not display a client's account number in the Contact Manager.	

Work Order (tab)

Table 15: Global Settings—Work Order (tab)

Label	Action	✓
Product Category	This is a feature in development. At this time there are no options available on the Work Order tab.	