KCSI is pleased to announce the release of SIMMS 2019

The following are the release notes for SIMMS 2019 vol. 1.1 to 1.2

<mark>Note, you need to be running Microsoft SQL Server Express 2012 or higher to run the latest version of SIMMS.</mark>

There have been many changes to SIMMS over the last year. If you have not upgraded recently it is a good idea that you also review the release notes for 2017 and release note for 2018.

The following enhancements have been in direct response to you, our customer's feedback. We encourage you to contact us with any feedback you have at support 604-504-7936.

Release notes for SIMMS 2019 vol. 1.2

Enhancements

Case 10433

You are now able to contact support using the Live Help chat feature at the bottom left of the SIMMS window. Note, Live Help is available from 9:00 AM to 3:00 PM Monday to Friday (excluding holiday).

Case 11378

There have been several enhancements to physical count feature. Now, the Physical Count window is locked so you can only open the same physical count document once. This will prevent multiple users making changes to the same document at the same time. Also, the time it takes to load large documents has been improved. And the time to correct the stock quantities when you click "correct All" has been improved. A progress bar has been added to the window.

Case 11388

There are three major enhancements to the backorder process. The first is that you can now receive email alerts when an item on backorder has been received into inventory. This new feature is important to help bridge the gap between the receiving process and sales process. The sales team can now know that a backordered item is received into inventory and available to fill a sales transaction. To enable this alert for a user do the following steps:

1. Go to **Administration** > **User Manager**.
2. Select the user you want to enable email alerts for and click the **Edit** icon.
3. On the **User Rights** tab, expand the **<Standard>** node > and then expand the **Backordered Items** node.
4. Select the **Full Access** option and then select the **Receive email alerts…** checkbox.
5. Click the **Save** icon.

Note, to use SIMMS email functionality you need to setup your SMTP setting in Global Settings.

The second enhancement to the backorder process is the addition of the Backordered Items window. This window opens automatically after you save a receipt that has backordered items on it. The window lists the backordered items and also list the sales transactions the backordered items are on. This feature is helpful when the person who receives items into inventory can also fill backorders. The user can easily open the sales transaction from the pop-up window and fill any backorder quantities. Note, you will need to enable this feature for each user you want to have access to the Backordered Items window. You do this in the User Manager (**Administration** > **User Manager** > **Standard** > **Backordered Items** > **Full Access**).

The below image is of the Backordered Items window that opens from the Receipt Manager:

The item that is on backorder.

Click the Ellipses button to open the sales transaction and fill the backorder quantity.

The third enhancement to the backorder process is the addition of the Fulfill BO's icon on sales transactions (sales orders, invoices). Simply click the icon and SIMMS will automatically fill your backorder quantities on your sales transaction. With the addition of this option, you no longer have to manually adjust the backorder quantities for an item. Although the icon is available on both sales orders and invoices, they work in slightly different ways.

To automatically fill backordered quantities on a sales order do the following.

1. Open the sales order you want to fill its backorder quantities.
   (Note, you can do this from the Backordered Items window that opens after saving a receipt or from the Sales Order Manager).
2. Click the **Edit** icon.
3. Click the **Fulfill BO's** icon.
   SIMMS automatically moves the backorder quantity to the **Quantity** column. This also means that like all items on a sales order, the item is now reserved for the sales order.
4. Click the **Save** icon.
5. (Optional), click the **Export to Invoice** icon to complete the process and invoice out your sales order.

To automatically fill backordered quantities on an invoice do the following.

1. Open the invoice with the backordered quantities you want to fill.
   (Note, you can do this from the Backordered Items window that opens after saving a receipt or from the Invoice Manager).
2. Click the **Fulfill BO's** icon.
3. A pop-up window opens, asking you to confirm you want to create a new invoice for your backorder quantities. Click **Yes**.
   A new invoice is created for your backordered items.

4.   Click **Save**.

Backorders are not filled on the original invoice. This is because the invoice date must be after the receipt date to ensure the item has the correct cost-of-goods.

Also note, the Source Order No. field shows the original invoice number that the backordered item came from. This helps you to trace the original invoice the backorder item was on.

It is important to note, the system will only autofill all of the backorder quantity for items with lot numbers, but will partially fill items that do not have lot numbers. For instance, if a sales order has 10 of Item-A on backorder and 5 are received into inventory you can autofill the 5 of the 10 items. However, if you had 10 of Item-B (that uses lot numbers) on backorder and 5 came with a lot number, the system will not autofill any portion of Item-B. To autofill Item-B, you would need to have all 10 of Item-B from single lot number.

Case 11389

In the **Item Manager** > **Transaction** tab, we added a cost/price column for the item. So for purchasing transaction you will now see the cost of the item for each purchase order and receipt listed. For sales transactions, you will see the price of the item for each quote, sales order, and invoice. The advantage of this is that you do not have to open the transaction to see the item cost/price. This new column is also a good way to see how the cost or price for an item changed over time.

Case 11411

Added a stored procedure that makes it easy to fix issues where the stock quantity does not match the transaction history. This tool is designed to be used by people familiar with SQL. What it does is rebuild stock tables based on transaction history. This ensures your stock quantities for an item match the items transaction history. For more information about this tool please contact support.

Case 11418

Enhanced the importing of sales orders using the **Visual Import Manager**. When you import a sales order using the Visual Import Manager, SIMMS will automatically enter the item's alias on the newly created sales order. As such, you will not have to edit the newly created sales order and manually select an item's alias. Also, the alias field has been added to the Visual Import Manager, so if you choose, you can import the item alias along with the items other details.

Case 11436

Added the ability to **transfer** an item's **on-hold quantities**. Before if you wanted to transfer an item that was on-hold, you need to move the item to on-hand and then transfer the items. After which, you would place the item back on-hold.

In the Transfer window, we have added a field for the on-hold quantity (OnHold Qty) and a field for the on-hold comment (OnHold Comment). To transfer on-hold items, enter the quantity of the on-hold item you want to transfer in the OnHold Qty field. Optionally, enter a comment in the OnHold Comment field and click OK to save the

comment. NOTE, you can only transfer items manually placed on-hold, not items placed on-hold as part of the kitting process. A column that shows the quantity of the item available to transfer has also been added, called Stock OnHold. It is only shows the quantity available to transfer, i.e. Manual on-hold quantities.

Lastly, you are now able to restrict who can make an on-hold comment. To do this you simply go to a user's profile in the User Manager and remove or allow the permission called "Allow Edit On-Hold Comment." You will find this permission at User Manager > User Rights (tab) > Standard > Stock On Hold.

Case 11470

There have been several enhancements to **kitting in low memory environments**. If there is not enough RAM to process stock allocation or commit a kit, you may get a "dead lock" error. This is an error generated by the SQL server in which it locks a process when there are multiple request for a resource. It does this because there is not enough memory to process all requests. Now instead of the SQL error, SIMMS will show a warning that the server is busy. Also, importantly if the process is locked while the allocation or the commit process is partially complete, you can now continue the allocation or commit process after the warning that the SQL server is busy.

Fixes

Case 11403

Fixed a problem where the printed Transaction Activity Summary Report was printing the wrong category.

Case 11408

Fixed a problem in the Customer Manager where the user could not edit a customer's credit limit.

Case 11423

Fixed a problem that generated an error when a user tried to delete a payment that had been deposited to a cash account. You cannot delete a payment that has been deposited to a cash account.

Case 11425

Fixed a problem where the user could not import a purchase order into a receipt. This only occurred if the selected purchase order was the first purchase order listed.

Case 11438

Fixed a problem where the user would get an error when they clicked the Preview button in the Email Template window for statements.

Case 11447

Fixed a problem where the user clicked a row in the Trace Item window and received an error.

Case 11471

Fixed a problem when updating the quantity on a purchase order. The changes made to the quantity would not save but revert back to the original quantity. This only happened on the first row in the grid.

Case 11483

Fixed an issue where the New Icon was not showing on a receipt and the Cancel Document button was incorrectly deleting the document.

Case 11492

Fixed a problem when linking a document to an item in the Item Manager. The document was uploaded to the database. The document should not have been uploaded to the database but only linked.

Release notes for SIMMS 2019 vol. 1.1

Enhancements

Case 11185

Added the **kit build order number** for component items in the **Trace Serial Number** report. This will make it easier to identify the kit build a serialized item was used in.

Case 11232

In the last release of SIMMS we added the ability to add notes/alerts to items in the Item Manager. In this release we have added a **Notes Manager** (Administration > Notes Manager). This window lists all your notes for customers, vendors, and items. Only notes that you have been assigned as a recipient will appear in your Note Manager. The Note Manager will make it easier to communicate between team members the information you want to share about a customer, vendor, or item. In addition, you can now have the notes you create **emailed** to the recipient of the note. In this way, you can be certain that your note will be seen by your intended recipient.

Case 11242

In a recent release of SIMMS we added the ability to list all customers that have an outstanding balance and email your statements (Customer Manager > File > Email Statements). This is an important tool for those who use SIMMS AR feature. In this release we have added the ability to open the AR Manager and generate the statement and customer aged detail report directly from the Email Statements window. This will make it easier for you to investigate your customer's financial details directly from the Email Statement window.

In the Email Statements window, for any row do any of the following:

- To view the **AR Manager**, click in the **Total Owing** field, and then click the button that appears.
- To generate a **statement report**, click in the **Balance** field, and then click the button that appears.
- To generate an **aged detail report**, click in the **Overdue** field, and then click the button that appears.

Case 11248

We have added **pop-up message** that alerts you when your workstation has **lost connection to the SQL Server**. The message will help users better understand that they have lost connection to the SQL Server and that they need to sign back into SIMMS to reestablish that connection.

Case 11249

The **Apply Landed Costs** window has been enhanced so that it does not automatically close after you click the Save button.

Case 11268

A pop-up message has been added that **warns you if there are any sub-kits that have been started but not finished**. This message appears when you commit a parent kit with sub-kits. We found that some users where starting a sub-kit and allocating stock to the sub-kit. However, they would not commit the sub-kit. Rather they would go to the parent kit and allocate and commit the parent kit using existing stock (on the shelf). The result is that the original sub-kit that was started is left uncommitted with stock on-hold.

Case 11269

The required date has been added to the **Unreceived Item Summary Report** (Report Center > Purchasing > Status > Unreceived Item Summary Report). This report lists your open purchase orders and the dollar value of the unreceived items on the purchase order.

Case 11270

In previous versions of SIMMS, when you manually closed a sale order or purchase order, the quantities not invoiced or received were moved to the Issues or Received column on the transaction. This gave the impression that all item quantities on the transaction were either invoiced or received, which was not necessarily correct. Invoiced and received quantities are no longer moved to the Issued or Received column when you manually close a sales order or purchase order. Because of this you will be able to tell how many of your items where actually invoiced or received on a sales order or purchase order even after the transactions were manually closed.

Case 11280

Enhanced the **Stock Item Listing** report to list the items alpha-numerically by item code.

Case 11289

Various windows and grids in the financial module have been upgraded.

Case 11357

The **Usage Report** has been enhanced so that it shows the actual date an item from inventory was used. Previously, the report only showed the transaction date. This enhancement is particularly useful for people who are interested in knowing the actual date a component item was used (i.e. committed) in kitting.

Case 11361

There is an **error log** file located in the SIMMS folder for each computer SIMMS is installed on. This file will now be backed up after it exceeds 500KB and a new file will be started. In addition, all errors from all workstations are now written to your company database. This will help when investigating reported problems.

Case 11366

A column that shows **payment terms** has been added to the **Invoice Manager** and **Receipt Manager**. This will make it easier for you to determine if an invoice or receipt is overdue.

Case 11367

The **bank reconciliation window** now shows the total number of deposits and payments you have selected and their total value. Because of this, you can compare the total amounts selected for your deposits and payments with the totals on your bank statement. Also, the size of the deposit grid and payment grid have been increased. So you can now see more of your listed deposits and payments without having to scroll. Lastly, a 'select all' and 'clear all' button has been added for the deposit grid.

Case 11369

Previously, when you **exported/imported a quote** to a sales order or invoice, the document number for the sales order or invoice was always the quote's order number. This was even the case when you edited the quote's document number and entered something other than the quote's order number. Now, if you edit the document number field, your edited document number will be imported/exported into your sales order or invoice.

Case 11374

Previously, a **vendor-part-number cost** was not updated when the cost was changed in a receipt, only the standard cost was updated. Now if the cost of a VPN is changed in a receipt then both the standard cost and the VPN cost is updated. Note, both the standard cost and VPN cost are only updated if in Global Settings, the option 'Update standard cost' is selected.

Fixes

Case 11172

Fixed an issue where an error message was generated by adding an item to a kit build, deleting the item (i.e. row) and then adding the item back on the kit build.

Case 11199

Fixed an issue where the user could not save a sales order. The user would save the sales order and it would show as saved, however, when the sales order was viewed again it would show as not being saved.

Case 11202

Fixed an issue in the Enhanced Search window, where an item was incorrectly added to the transaction when searching a category.

Case 11205

Fixed an issue where the sales tax was not being imported/exported from a quote to an invoice.

Case 11206

Fixed an issue where the RMAIN does not show the taxes. This happened when a saved RMAIN was reopened and an additional item was added to the RMAIN.

Case 11215

Fixed an issue where the expiration date changed after saving an invoice.

Case 11227

Fixed an issue where an error message was generated when clicking the New icon.

Case 11244

Fixed an issue where the user deletes a single row on a quote but two rows are actually removed from the quote.

Case 11261

Fixed an issue with landed costs and currency. The user generates a receipt (bill) for landed costs but the receipt is not in the correct currency i.e. the vendor's default currency.

Case 11275

Fixed an issue where an error message was generated when importing a quote into a sale order.

Case 11295

Fixed an issue that generated error message when opening the RMA window.

Case 11299

Fixed an issue where the Required Date does not update when the terms are changed.

Case 11308

Removed budget categories from RTVOUT. The RTVOUT transaction is not related to budget categories and created errors.

Case 11309

Fixed an issue when adding a serial number to a kit.

Case 11316

Fixed an error when deleting the first (only) row on a transfer.

Case 11333

Fixed an issue where adjusting a negative inventory item. In this case the stock adjustment was backdated.