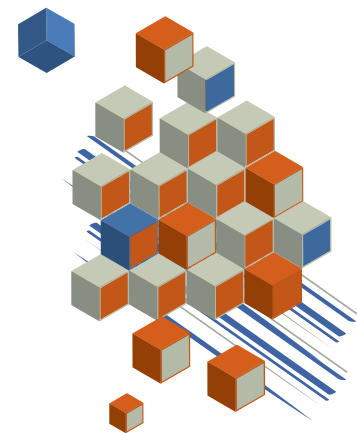




## Visual Import Manager Guide

**SIMMS** Inventory Management Software 7.3

**September 20, 2010**



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# Visual Import Manager

The Visual Import Manager is an external application that allows the contents of a user's existing Microsoft® Access® database, Microsoft Excel® file, text file or comma-separated values file into a new SIMMS database. Use of this program allows inventory details such as item characteristics, categories, locations, costs and prices, as well as transactions already performed (like purchase orders and sales orders) to be pulled into SIMMS. All this can be a huge saving of time and effort because otherwise, you would have to manually create, or recreate, everything.

The Visual Import Manager can be used to import data into an existing SIMMS database (company file), it is most often used to import all existing inventory and transaction data into a new SIMMS database so that all your items, customers, vendors, prices, and so forth can be established in one session.

## Process Overview

The SIMMS Visual Import Manager allows for the import of data into a SIMMS database (company file).

### Import Process - Overview

The steps in the process are as follows:

1. Selection of the source files from which the data will be imported.
2. Connecting to the SIMMS database into which the data will be imported.
3. Selection of the table in the database into which the data will be imported.
4. Affiliation of column headers in the source file with respective headers in the target table.
5. Importing the data.

The table in the SIMMS database into which data may be imported are as follows:

1. Items
2. Country
3. Customers
4. Customer Ship-To

5. Item Alias
6. Item Matrix
7. Kit Schema
8. Locations
9. Matrix
10. Purchase Orders
11. Quotes
12. Sales Orders
13. Serial Numbers
14. Stock
15. Vendors
16. Vendors' Part Numbers
17. Vendor's Catalog

## **Update Process - Overview**

The Visual Import Manager also permits you to update information in SIMMS by way of allowing external editing of data from SIMMS and then importing the changed data back into SIMMS. This saves the user a lot of time because in many instances, such as when sales prices are changed for a vast number of items, it is easier to make such edits externally in Microsoft Excel and then use the Visual Import Manager to perform the update of SIMMS information rather than you making edits one item at a time in SIMMS.

This update process is as follows:

1. Exporting SIMMS data to an external Excel file.
2. Editing the data in the Excel file.
3. Using the Visual Import Manager to overwrite the existing SIMMS information with the newer and more accurate information in the Excel file.
4. Resuming transactions and business flow in SIMMS.

These steps will be explained in more detail in the following pages.

## Data Management

In some cases, you would use the Visual Import Manager to import your initial inventory and transaction information into SIMMS. First, you would create a new SIMMS database for your company, and then you would import all your information.

**i** **Information:** For dates in source files, the date format must be in the mm/dd/yyyy form.

### Creating a New SIMMS Database

1. Log into an existing SIMMS database on the SIMMS Login window.



Figure 1: SIMMS Login window

The SIMMS main window opens.

2. On the Administration menu, click **Company Manager**.

The **Company Manager** window opens.

3. Click **New Company**.
4. Type a name for the new company in the blank field.
5. Click **Save**.

6. Click **Next** on each of the subsequent progress windows, then click **Close** for each one.  
A message window confirms the creation of the database.
7. Click **OK**.

### Setting the Read Permission in the Access Database

The Visual Import Manager must have read permission set before it can import information from a Microsoft Access database.

1. Start Microsoft Access.
2. Select and open the database from which you want to import data into SIMMS.
3. On the **Tools** menu, click **Options**.  
The **Options** window confirms the creation of the database.
4. Click the **View** tab.
5. Click the **System Objects** check box.
6. Click **Apply**, then click **OK**.

The **Options** window closes.

### Setting the User and Group Permissions in the Access Database

1. On the **Tools** menu, choose **Security**, then click the **User and Group Permissions** tab.
2. For the Object Type, click **Table**.
3. For the Object Name, click **MSysObjects**.
4. Click the **Administer** check box (this will select all the check boxes).
5. Click **Apply**.
6. Click **OK** to close the window.

The Read Permission has now been set in the Access database.

## Connecting to the SIMMS Database

1. From your Windows Start button>Programs menu, select the SIMMS Inventory Management program group, then click **SIMMS Visual Import Manager**.



Figure 2: View Templates window.

The **View Templates** window opens. If you are importing from a file you have imported from before, the file name will appear in the list of templates in the window. Select the file and click **OK**.

If, however, you want to import from a file you have never imported from before, close the **View Templates** window by clicking **Cancel**.

**NOTE:** If you wish to perform repeated updates from one particular file, such a file of Items, once you are ready to import the first time, the Import Manager window has a check box titles Add Source File to an Active Directory after Import. Checking this box will add the source file's name to the View Templates window contents, thus making it easier and quicker to select it for any future updates.



The SIMMS Visual Import Manager window will open.

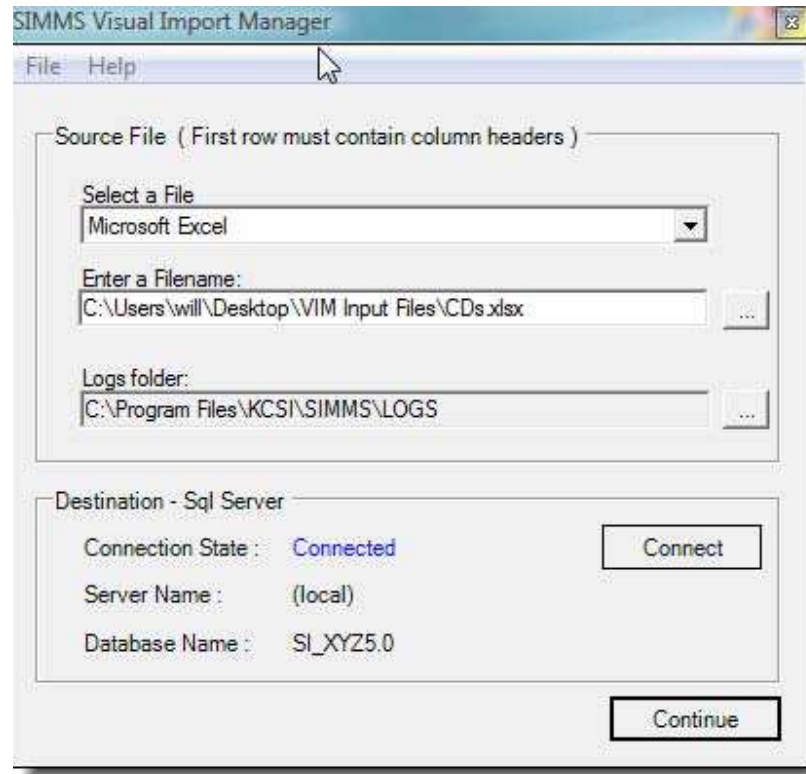



Figure 3: SIMMS Visual Import Manager window.

2. Click **Connect**.

The SQL Server Connection window will open.

3. Select the Server Name from the **Server Name** drop-down list.

If your desired Server Name does not appear in the list, click the ellipsis button . The list of SQL Servers to which you are connected will be refreshed.

4. Click the **V** icon to the right of the **Server Name** field to view the contents of the refreshed list.
5. Click the Server Name on the list.
6. Type the Login Name in the **Login Name** field.
7. Type the password in the **Password** field.

**NOTE: If the connection to SIMMS database instead uses the same Login Name and Password as you use to gain access to Windows, select the Use Windows NT Authorization check *box*.**

8. Click **Connect**.

A Connection Succeeded dialog box will appear.

9. Click **OK**.

The **SQL Server Connection** window opens.

## Connecting to the SQL Server

1. In the **SQL Server Connection** window, select the database from the Database Name drop-down list.

**NOTE: This is the database into which you want to import the data (your target database).**

2. Click **OK**.

The **SQL Server Connection** window will close.



## Connecting to the Data Source

The next step necessary for the data import is to choose the data source file *from which* the data will be imported.

You can import data in four formats:

- Microsoft Access database (.MDB) file
- Microsoft Excel spreadsheet (.XLS or .XLSX) file
- Comma Separated Values (.CSV) file
- Text (.TXT) file

1. In the **SIMMS Visual Import Manager** window, in the **Select a File** field, click the file format of your source file.

2. In the **Enter a Filename** field, click the ellipsis button  to locate and select the file.
3. In the **Logs Folder** field, click the ellipsis button  to locate and select which folder will hold any log files.

**NOTE: Logfiles will contain information about what has occurred during the import, such as how many items were imported, information on any errors that occurred, and so on.**

4. When finished with all selections, click **Continue**.

The SQL Server Connection window will close. The **Import Options** window opens.

## Importing Items into SIMMS

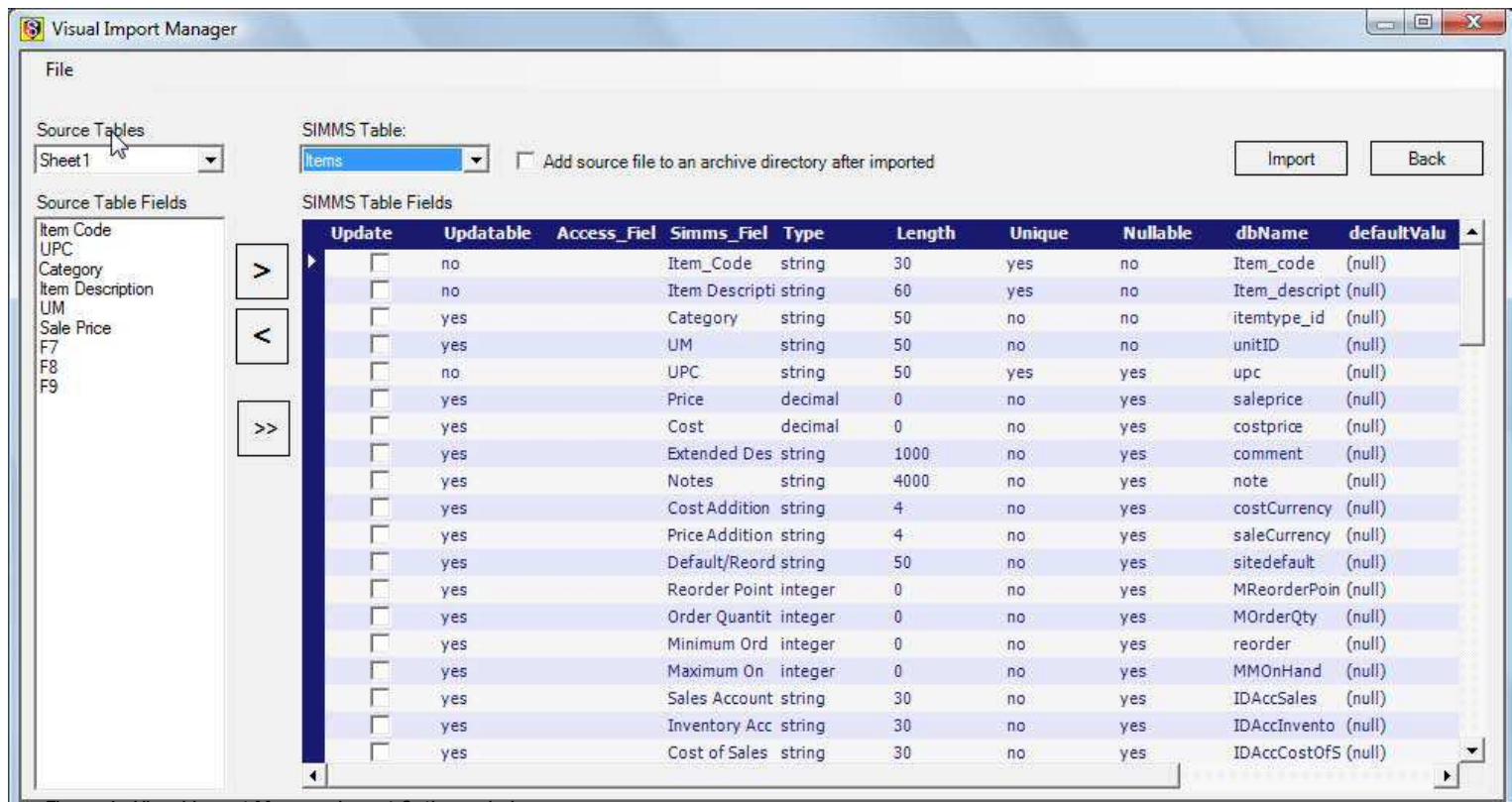


Figure 4. Visual Import Manager Import Options window.

**NOTE:** In the example shown, we use a Microsoft Excel file format as our information source file.

**Information:** Before importing items into SIMMS, the Customers and Vendors referred to in the source file must already exist in SIMMS. Please import all customers and vendors first, and then you can proceed with importing items.

1. In the **Source Tables** field, we see the Excel file that contains the item information.
2. In the **Source Table Fields** pane, we see the item details in the source file that can be imported, such as Item Code, UPC, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **Items** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the item details that can be imported into SIMMS, such as Item Code, Item Description, Category, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.



**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 1 contains the SIMMS table fields into which item information can be imported. Mandatory fields are labeled for the source document as well; the remainder are left blank so that you can use the table as a printable checklist before you import the items:

Table 1: Items - Import into SIMMS

Source Headers	SIMMS Item Table Headers	✓
Item Code (Part Number)	<u>Item Code</u>	

Table 1: Items - Import into SIMMS

Source Headers	SIMMS Item Table Headers	✓
Item Name	<b><u>Item Description</u></b> - NOTE - If users have set in Global Settings that item descriptions are not unique, then imported item descriptions do not have to be unique.	
UPC	<b><u>UPC</u></b>	
Unit of Measure	UM	
	Price	
	Cost	
	Extended Description	
	Notes	
	Cost Additional Currency	
	Price Additional Currency	
	Default/Reorder Location	

Table 1: Items - Import into SIMMS

Source Headers	SIMMS Item Table Headers	✓
	Reorder Point	
	Order Quantity	
	Minimum Order Quantity	
	Maximum OnHand	
	Sales Account	
	Inventory Account	
	Cost of Sales Account	
	User-Defined 1	
	User-Defined Text 1	
	User-Defined Text 2	
	Last/Preferred Vendor	

Table 1: Items - Import into SIMMS

Source Headers	SIMMS Item Table Headers	✓
	Is Active Item - <b>NOTE - For all items to be classed as an Active item, this field must contain a 1</b>	
	Is Salable Item - <b>NOTE - For all items to be classed as a Salable item, this field must contain a 1</b>	
	Length	
	Width	
	Height	
	Volume	
	Weight	
	Reorder Days (Lead Time)	
	Default Warranty on Receiving	
	Default Warranty on Issuing	

Table 1: Items - Import into SIMMS

Source Headers	SIMMS Item Table Headers	✓
	Use Expiration Dates: <b>NOTE - For all items to use Expiration Dates, this field must contain a 1</b>	
	Use Apparel Matrix: <b>NOTE - For all items to use Apparel Matrix, this field must contain a 1</b>	
	Use Unique Features: <b>NOTE - For all items to use Unique Features, this field must contain a 1</b>	
	Use Serial Numbers: <b>NOTE - For all items to use Serial Numbers, this field must contain a 1</b>	
	Used for E-store: <b>NOTE - For all items to be used in the E-store, this field must contain a 1</b>	
	User-Defined 2	
	Default Purchase Unit of Measure	
	Default Sales Unit of Measure	
	Subcategory	



Table 1: Items - Import into SIMMS

Source Headers	SIMMS Item Table Headers	✓
	Price Level I	
	Price Level II	
	Price Level III	
	Price Level IV	
	Price Level V	
	Price Level VI	
	Price Level VII	
	Price Level VIII	
	Price Level IX	
	Price Level X	
	Price Level XI	

Table 1: Items - Import into SIMMS

Source Headers	SIMMS Item Table Headers	✓
	Price Level XII	
	Additional Field 1	
	Additional Field 2	
	Additional Field 3	
	Additional Field 4	
	Additional Field 5	
	Additional Field 6	
	Additional Field 7	
	Additional Field 8	
	Additional Field 9	
	Additional Field 10	

Table 1: Items - Import into SIMMS

Source Headers	SIMMS Item Table Headers	✓
	Additional Field 11	
	Additional Field 12	
	Additional Field 13	
	Additional Field 14	
	Additional Field 15	
	Additional Field 16	
	Additional Field 17	
	Additional Field 18	
	Additional Field 19	
	Additional Field 20	
	Additional Field 21	

Table 1: Items - Import into SIMMS

Source Headers	SIMMS Item Table Headers	✓
	Additional Field 22	
	Additional Field 23	
	Additional Field 24	
	Additional Field 25	
	Additional Field 26	
	Additional Field 27	
	Additional Field 28	
	Additional Field 29	
	Additional Field 30	
	Additional Field 31	
	Additional Field 32	

## Affiliating Source Item Fields to SIMMS Item Fields

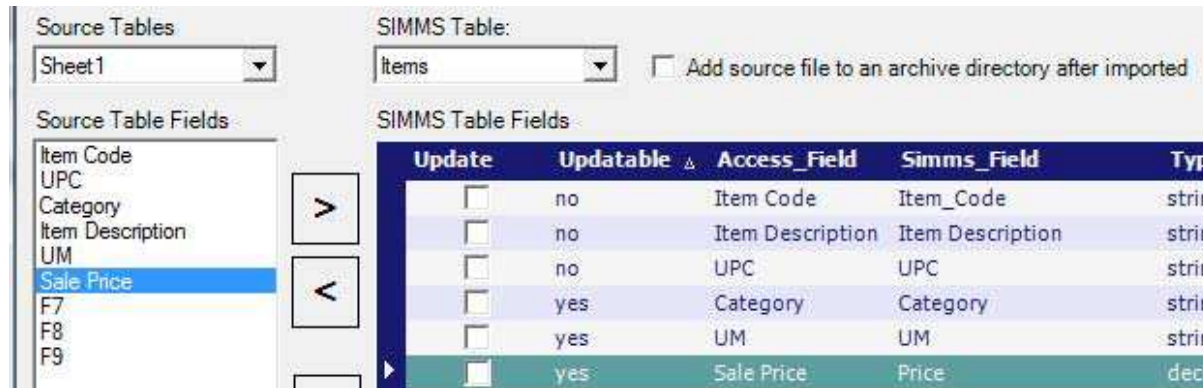


Figure 5: Affiliating fields on the Visual Import Manager window

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane (such as Sale Price, shown in Figure 5).
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click **Import**.

Upon your next log into the target database in SIMMS, the new data will exist.

## Importing Countries into SIMMS

1. In the **Source Tables** field, we see the source file that contains the country information.
2. In the **Source Table Fields** pane, we see the country details in the source file that can be imported, such as Item Code, UPC, and so on.

3. In the **SIMMS Table** drop-down list, we have selected **Country** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the country details that can be imported into SIMMS: Country Name and Country Code.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.



**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 2 contains the SIMMS table fields into which country information can be imported.

Table 2: Country - Import into SIMMS

Source Headers	SIMMS Country Table Headers	✓
<b>Country Name</b>	<u>Country Name</u>	
<b>Country Code</b>	<u>Country Code</u>	

### Affiliating Source Country Fields to SIMMS Country Fields

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.

10. Once finished, click Import.

Upon your next log into the target database in SIMMS, the new data will exist.

## Importing Customers into SIMMS

1. In the **Source Tables** field, we see the source file that contains the customer information.
2. In the **Source Table Fields** pane, we see the customer details in the source file that can be imported, such as Item Code, UPC, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **Customer** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the item details that can be imported into SIMMS, such as Description, Additional Description, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.

Table 1 contains the SIMMS table fields into which customer information can be imported. Mandatory fields are labeled for the source document as well; the remainder are left blank so that you can use the table as a printable checklist before you import the items:



**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 3: Customers - Import into SIMMS

Source Headers	SIMMS Customer Table Headers	✓
Description	<u>Description</u>	

Table 3: Customers - Import into SIMMS

Source Headers	SIMMS Customer Table Headers	✓
<b>Additional Description</b>	Additional Description	
<b>Client Type</b>	Client Type	
<b>Address</b>	address	
	City	
	State	
	Zip	
	Notes	
	Country	
	E-mail	
	Phone 1	
	Phone 2	



Table 3: Customers - Import into SIMMS

Source Headers	SIMMS Customer Table Headers	✓
	Fax	
	Website	
	Comment	
	CreditLimit	
	Textbox6	
	Textbox7	
	Textbox8	
	Textbox9	
	Combobox10	
	Combobox11	
	Date12	

Table 3: Customers - Import into SIMMS

Source Headers	SIMMS Customer Table Headers	✓
	Date13	
	Department	
	Foreign Currency	
	Assigned Location	
	Price Level	
	Shipment Method	
	Tax Code	
	Sales Agent	
	Territory	
	Payment Terms	
	Credit Card Type	

Table 3: Customers - Import into SIMMS

Source Headers	SIMMS Customer Table Headers	✓
	Credit Card Number	
	Credit Card Exp Year	
	Credit Card Exp Month	
	Name on Credit Card	
	Contact Person Name	
	Contact Person Title	
	Contact Person Phone 1	
	Contact Person Phone 2	
	Contact Person E-mail	
	Contact Person Fax	
	Default Contact	

Table 3: Customers - Import into SIMMS

Source Headers	SIMMS Customer Table Headers	✓
	Additional Field 1	
	Additional Field 2	
	Additional Field 3	
	Additional Field 4	
	Additional Field 5	
	Additional Field 6	
	Additional Field 7	
	Additional Field 8	
	Additional Field 9	
	Additional Field 10	
	Additional Field 11	



Table 3: Customers - Import into SIMMS

Source Headers	SIMMS Customer Table Headers	✓
	Additional Field 12	
	Additional Field 13	
	Additional Field 14	
	Additional Field 15	
	Additional Field 16	
	Additional Field 17	
	Additional Field 18	
	Additional Field 19	
	Additional Field 20	
	Additional Field 21	
	Additional Field 22	

Table 3: Customers - Import into SIMMS

Source Headers	SIMMS Customer Table Headers	✓
	Additional Field 23	
	Additional Field 24	
	Additional Field 25	
	Additional Field 26	
	Additional Field 27	
	Additional Field 28	
	Additional Field 29	
	Additional Field 30	
	Additional Field 31	
	Additional Field 32	

## Affiliating Source Customer Fields to SIMMS Customer Fields

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click Import.

Upon your next log into the target database in SIMMS, the new data will exist.

## Importing Customer Ship-To into SIMMS

1. In the **Source Tables** field, we see the source file that contains the Customer Ship-To information.
2. In the **Source Table Fields** pane, we see the country details in the source file that can be imported, such as Item Code, UPC, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **Customer Ship-To** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the Customer Ship-To details that can be imported into SIMMS: Description, Contact-Ship-To Name, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.



Table 4 contains the SIMMS table fields into which Customer Ship-To information can be imported.

Table 4: Customer Ship-To - Import into SIMMS

Source Headers	SIMMS Customer Ship-To Table Headers	✓
<b>Description</b>	<b><u>Description</u></b>	
<b>Contact - Ship-To Name</b>	<b>Contact - Ship-To Name</b>	
<b>Ship-To Address</b>	<b>Ship-To Address</b>	
	Ship-To Phone 1	
	Ship-To Phone 2	
	Ship-To City	
	Ship-To State	
	Ship-To Zip	
	Ship-To E-mail	
	Ship-To Country	



## Affiliating Source Customer Ship-To Fields to SIMMS Customer Ship-To Fields

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click **Import**.

Upon your next log into the target database in SIMMS, the new data will exist.

## Importing Item Aliases into SIMMS

1. In the **Source Tables** field, we see the source file that contains the item alias information.
2. In the **Source Table Fields** pane, we see the item alias details in the source file that can be imported, such as Item Code, Item Alias, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **Item Alias** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the Item Alias details that can be imported into SIMMS: item Code, item Alias, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.

Table 5 contains the SIMMS table fields into which Item Alias information can be imported.



**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 5: Item Aliases - Import into SIMMS

Source Headers	SIMMS Item Alias Table Headers	✓
Item Code	<u>Item Code</u>	
Item Alias	Item Alias	
Vendor Name	Vendor Description	
Customer Name	Customer Description	

### Affiliating Source Item Alias Fields to SIMMS Item Alias Fields

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click Import.

Upon your next log into the target database in SIMMS, the new data will exist.

## Importing Item Matrixes into SIMMS

1. In the **Source Tables** field, we see the source file that contains the item matrix information.
2. In the **Source Table Fields** pane, we see the item matrix details in the source file that can be imported: Item Code and Matrix Style.
3. In the **SIMMS Table** drop-down list, we have selected **ItemMatrix** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the item matrix information that can be imported into SIMMS: Item Code and Matrix Style.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.

Table 6 contains the SIMMS table fields into which item matrix information can be imported.





**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 6: Item Matrix - Import into SIMMS

Source Headers	SIMMS Item Matrix Table Headers	✓
Item Matrix	<u>Item Matrix</u>	
Matrix Style	Matrix Style	

## Affiliating Source Item Matrix Fields to SIMMS Item Matrix Fields

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click Import.

Upon your next log into the target database in SIMMS, the new data will exist.

## Importing Kit Schemas into SIMMS

1. In the **Source Tables** field, we see the source file that contains the kit schema information.
2. In the **Source Table Fields** pane, we see the kit schema details in the source file that can be imported, such as Kit Item Code, Component Item Code, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **KitsSchema** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the kit schema details that can be imported into SIMMS, such as Kit Item Code, Component Item Code, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.



**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 7 contains the SIMMS table fields into which kit schema information can be imported.

Table 7: Kit Schema - Import into SIMMS

Source Headers	SIMMS Kit Schema Table Headers	✓
Kit Item Code	Kit Item Code	
Component Item Code	Component Item Code	
	Quantity	
	Is Adjustable: <b>NOTE - For items to be imported as Adjustable, this field must contain a 1</b>	
	Is Phantom Kit: <b>NOTE - For items be imported as Phantom Kits, this field must contain a 1-</b>	
	Set Price of Phantom Kit to zero	
	Calculate Component Pricing	

### Affiliating Source Kit Schema Fields to SIMMS Kit Schema Fields

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.

9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click Import.

Upon your next log into the target database in SIMMS, the new data will exist.

## Importing Locations into SIMMS

1. In the **Source Tables** field, we see the source file that contains the location information.
2. In the **Source Table Fields** pane, we see the location details in the source file that can be imported: location description.
3. In the **SIMMS Table** drop-down list, we have selected **Locations** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the locations details that can be imported into SIMMS: location description.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.
- 6.





**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 8 contains the SIMMS table fields into which location information can be imported.

Table 8: Locations - Import into SIMMS

Source Headers	SIMMS Locations Table Headers	✓
<b>Location Name</b>	<b><u>Location Description</u></b>	

## Affiliating Source Location Fields to SIMMS Location Fields

7. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
8. While both are selected, click the right icon .
9. The Source Table Field name will then appear in the Simms\_Field column.
10. If a selection gets affiliated incorrectly, select it in the right pane then click the left icon  to remove it, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
11. Once finished, click Import.

Upon your next log into the target database in SIMMS, the new data will exist.

## Importing Apparel Matrixes into SIMMS

1. In the **Source Tables** field, we see the source file that contains the apparel matrix information.
2. In the **Source Table Fields** pane, we see the apparel matrix details in the source file that can be imported, such as Color Code, Color Description, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **matrix** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the Item Alias details that can be imported into SIMMS, such as Color Code, Color Description, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.



**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 9 contains the SIMMS table fields into which Apparel Matrix information can be imported.

Table 9: Apparel Matrixes - Import into SIMMS

Source Headers	SIMMS Apparel Matrix Table Headers	✓
Color Code	Color Code	
Color Description	Color Description	
Size Code	Size Code	
Size Description	Size Description	
Style Code	Style Code	
Style Description	Style Description	

### Affiliating Source Apparel Matrix Fields to SIMMS Apparel Matrix Fields

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.



10. Once finished, click Import.

Upon your next log into the target database in SIMMS, the new data will exist.

## Importing Purchase Orders into SIMMS

1. In the **Source Tables** field, we see the source file that contains the purchase order information.
2. In the **Source Table Fields** pane, we see the purchase order details in the source file that can be imported, such as PO Number, Vendor, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **PurchaseOrder** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the item details that can be imported into SIMMS, such as PO Number, Vendor, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.



**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

**Information:** *Before importing purchase orders into SIMMS, all items, customers and vendors referred to in the source file must already exist in SIMMS. Please import all items, customers and vendors first, and then you can proceed with importing the purchase orders.*

Table 10 contains the SIMMS table fields into which purchase order information can be imported. Mandatory fields are labeled for the source document as well; the remainder are left blank so that you can use the table as a printable checklist before you import the items:

Table 10: Purchase Orders - Import into SIMMS


Source Headers	SIMMS Purchase Order Table Headers	✓
<b>Description</b>	<u>Vendor</u>	
<b>Additional Description</b>	Transaction Date	
<b>Client Type</b>	Item Number	
<b>Address</b>	Quantity	
	Cost	
	Textbox 3	
	Textbox 4	
	Document Number	
	Date Required	
	Ship-To Address	

Table 10: Purchase Orders - Import into SIMMS

Source Headers	SIMMS Purchase Order Table Headers	✓
	Textbox 5	
	Item Comment	
	Item Comment	
	Item Comment	
	Item Comment	
	Item Comment	
	PO Number	

**Affiliating Source Purchase Order Fields to SIMMS Purchase Order Fields**

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.

9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click Import.

Upon your next log into the target database in SIMMS, the new data will exist.

## Importing Quotes into SIMMS

1. In the **Source Tables** field, we see the source file that contains the quote information.
2. In the **Source Table Fields** pane, we see the quote details in the source file that can be imported, such as Item Code, Quantity, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **Quotes** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the quote details that can be imported into SIMMS, such as Item Code, Quantity, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.

**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

**Information: Before importing quotes into SIMMS, all items, customers and vendors referred to in the source file must already exist in SIMMS. Please import all items, customers and vendors first, and then you can proceed with importing the quotes.**



**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 11 contains the SIMMS table fields into which quote information can be imported. Mandatory fields are labeled for the source document as well; the remainder are left blank so that you can use the table as a printable checklist before you import the items:

Table 11: Quotes - Import into SIMMS

Source Headers	SIMMS Quotes Table Headers	✓
<b>Item Code</b>	<u>Item Code</u>	
<b>Quantity</b>	Quantity	
<b>Unit of Measure</b>	Unit of Measure (UM)	
<b>Price</b>	Price	
	Quote Number	
	Customer	
	Quote Date	
	Available Date	
	Header Comment	

Table 11: Quotes - Import into SIMMS

Source Headers	SIMMS Quotes Table Headers	✓
	Final Comment	
	Item Comment	

### Affiliating Source Quote Fields to SIMMS Quote Fields

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click Import.

Upon your next log into the target database in SIMMS, the new data will exist.

### Importing Sales Orders into SIMMS

1. In the **Source Tables** field, we see the source file that contains the sales order information.
2. In the **Source Table Fields** pane, we see the sales order details in the source file that can be imported, such as Customer, Item Code, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **SalesOrders** as the target table in SIMMS that will receive the imported information.

4. In the right pane, we see the sales order details that can be imported into SIMMS, such as Customer, Item Code, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.

**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.



**Information:** Before importing sales orders into SIMMS, all items, customers and vendors referred to in the source file must already exist in SIMMS. Please import all items, customers and vendors first, and then you can proceed with importing the sales orders.

Table 12 contains the SIMMS table fields into which sales order information can be imported. Mandatory fields are labeled for the source document as well; the remainder are left blank so that you can use the table as a printable checklist before you import the items:

Table 12: Sales Orders - Import into SIMMS

Source Headers	SIMMS Sales Order Table Headers	✓
<b>Customer</b>	<u>Customer</u>	
<b>Item Code</b>	<b>Item Code</b>	
<b>Quantity</b>	<b>Quantity</b>	
<b>Cost</b>	<b>Cost</b>	
<b>Location</b>	<b>Location</b>	

Table 12: Sales Orders - Import into SIMMS

Source Headers	SIMMS Sales Order Table Headers	✓
<b>SO Number</b>	<b>SO Number</b>	
<b>SO Date</b>	<b>SO Date</b>	
	ZIP	
	Customer Address	
	Customer E-mail	
	Customer Phone 1	
	Customer Phone 2	
	Customer Fax	
	Customer City	
	Customer State	
	Customer Website	



Table 12: Sales Orders - Import into SIMMS

Source Headers	SIMMS Sales Order Table Headers	✓
	Customer Credit Limit	
	Customer Comment	
	Customer Sales Agent	
	Customer Tax Code	
	Department	
	Contact Name	
	Contact Title	
	Contact Phone 1	
	Contact Phone 2	
	Contact E-mail	
	Contact Fax	

Table 12: Sales Orders - Import into SIMMS

Source Headers	SIMMS Sales Order Table Headers	✓
	Ship-To Name	
	Ship-To Address	
	Ship-To City	
	Ship-To State	
	Ship-To Country	
	Ship-To Phone 1	
	Ship-To Phone 2	
	Ship-To E-mail	
	Item UM	
	Payment Type	
	Amount	

Table 12: Sales Orders - Import into SIMMS

Source Headers	SIMMS Sales Order Table Headers	✓
	Credit Card Type	
	Credit Card Number	
	Credit Card Expiration Year	
	Credit Card Month	
	Credit Card Name on Card	

### Affiliating Source Sales Order Fields to SIMMS Sales Order Fields

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click Import.

Upon your next log into the target database in SIMMS, the new data will exist.

# Importing Serial Numbers into SIMMS

1. In the **Source Tables** field, we see the source file that contains the serial number information.
2. In the **Source Table Fields** pane, we see the serial number details in the source file that can be imported, such as Item Code, Location, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **SerialNumbers** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the Serial Number details that can be imported into SIMMS: Item Code, Location, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.

**Information: Items already existing in SIMMS must be flagged as serialized items on the Item Manager screen before updates to them can be made. In addition, in the import source file, stock counts must be identical to Serial Number counts or the import will not work.**



**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 13 contains the SIMMS table fields into which Serial Number information can be imported.



Table 13: Serial Numbers - Import into SIMMS

Source Headers	SIMMS Serial Number Table Headers	✓
<b>Item Code</b>	<b>Item Code</b>	
<b>Location</b>	<b>Location</b>	
<b>Serial Number</b>	Serial Number	

Table 13: Serial Numbers - Import into SIMMS

Source Headers	SIMMS Serial Number Table Headers	✓
Warranty	Warranty	

### Affiliating Source Serial Number Fields to SIMMS Serial Number Fields

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click Import.

Upon your next log into the target database in SIMMS, the new data will exist.

### Importing Stock into SIMMS

1. In the **Source Tables** field, we see the source file that contains the stock information.
2. In the **Source Table Fields** pane, we see the stock details in the source file that can be imported, such as Item Code, Location, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **Stock** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the stock details that can be imported into SIMMS: Item Code, Location, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.





**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 14 contains the SIMMS table fields into which Stock information can be imported.

Table 14: Stock - Import into SIMMS

Source Headers	SIMMS Stock Table Headers	✓
<b>Item Code</b>	<b>Item Code</b>	
<b>Location</b>	<b>Location</b>	
<b>OnHand</b>	<b>OnHand</b>	
	Manufacturer Lot	
	Cost	
	User-Defined 5	
	Expiration Date	

## Affiliating Source Stock Fields to SIMMS Stock Fields

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click **Import**.

Upon your next log into the target database in SIMMS, the new data will exist.

## Importing Vendors into SIMMS

1. In the **Source Tables** field, we see the source file that contains the vendor information.
2. In the **Source Table Fields** pane, we see the vendor details in the source file that can be imported, such as Description, Credit Limit, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **Vendor** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the vendor details that can be imported into SIMMS, such as Description, Credit Limit, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.



**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 15 contains the SIMMS table fields into which vendor information can be imported. Mandatory fields are labeled for the source document as well; the remainder are left blank so that you can use the table as a printable checklist before you import the items:

Table 15: Vendors - Import into SIMMS

Source Headers	SIMMS Vendor Table Headers	✓
<b>Description</b>	<b><u>Description</u></b>	
	Additional Description	
	Client Type	
	Address	
	City	
	State	
	Zip	
	Notes	
	Country	
	E-mail	



Table 15: Vendors - Import into SIMMS

Source Headers	SIMMS Vendor Table Headers	✓
	Phone 1	
	Phone 2	
	Fax	
	Website	
	Comment	
	Credit Limit	
	Textbox6	
	Textbox7	
	Textbox8	
	Textbox9	
	Combobox10	

Table 15: Vendors - Import into SIMMS

Source Headers	SIMMS Vendor Table Headers	✓
	Combobox11	
	Date12	
	Date13	
	Department	
	Foreign Currency	
	Assigned Location	
	Price Level	
	Shipment Method	
	Tax Code	
	Sales Agent	
	Territory	

Table 15: Vendors - Import into SIMMS

Source Headers	SIMMS Vendor Table Headers	✓
	Payment Terms	
	Credit Card Type	
	Credit Card Number	
	Credit Card Exp Year	
	Credit Card Exp Month	
	Name on Credit Card	
	Contact Person Name	
	Contact Person Title	
	Contact Person Phone 1	
	Contact Person Phone 2	
	Contact Person E-mail	

Table 15: Vendors - Import into SIMMS

Source Headers	SIMMS Vendor Table Headers	✓
	Contact Person Fax	
	Default Contact	
	Additional Field 1	
	Additional Field 2	
	Additional Field 3	
	Additional Field 4	
	Additional Field 5	
	Additional Field 6	
	Additional Field 7	
	Additional Field 8	
	Additional Field 9	

Table 15: Vendors - Import into SIMMS

Source Headers	SIMMS Vendor Table Headers	✓
	Additional Field 10	
	Additional Field 11	
	Additional Field 12	
	Additional Field 13	
	Additional Field 14	
	Additional Field 15	
	Additional Field 16	
	Additional Field 17	
	Additional Field 18	
	Additional Field 19	
	Additional Field 20	

Table 15: Vendors - Import into SIMMS

Source Headers	SIMMS Vendor Table Headers	✓
	Additional Field 21	
	Additional Field 22	
	Additional Field 23	
	Additional Field 24	
	Additional Field 25	
	Additional Field 26	
	Additional Field 27	
	Additional Field 28	
	Additional Field 29	
	Additional Field 30	
	Additional Field 31	

Table 15: Vendors - Import into SIMMS

Source Headers	SIMMS Vendor Table Headers	✓
	Additional Field 32	

### Affiliating Source Vendor Fields to SIMMS Vendor Fields

6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click **Import**.

Upon your next log into the target database in SIMMS, the new data will exist.

### Importing Vendors' Part Numbers into SIMMS

1. In the **Source Tables** field, we see the source file that contains the vendors' part number information.
2. In the **Source Table Fields** pane, we see the vendors' part number details in the source file that can be imported, such as Item Code, Vendor Description, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **VendorPartNo** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the vendors' part number details that can be imported into SIMMS: item Code, item Alias, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.



**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 16 contains the SIMMS table fields into which vendors' part numbers information can be imported.

Table 16: Vendors' Part Numbers - Import into SIMMS

Source Headers	SIMMS Vendor's Part Number Table Headers	✓
<b>Item Code</b>	<u>Item Code</u>	
<b>Vendor Name</b>	<b>Vendor Description</b>	
<b>Vendor's Part Number</b>	<u>Vendor Part Number</u>	
<b>Cost</b>	Cost	

### Affiliating Source Vendors' Part Number Fields to SIMMS Vendors' Part Number Fields

6. Select each Source **Table Field** name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.



10. Once finished, click **Import**.

Upon your next log into the target database in SIMMS, the new data will exist.

## Importing Vendors' Catalogs into SIMMS

1. In the **Source Tables** field, we see the source file that contains the vendor's catalog information.
2. In the **Source Table Fields** pane, we see the vendor's catalog details in the source file that can be imported, such as Item Code, Item Description, and so on.
3. In the **SIMMS Table** drop-down list, we have selected **VendorCatalog** as the target table in SIMMS that will receive the imported information.
4. In the right pane, we see the vendor catalog details that can be imported into SIMMS, such as as Item Code, Item Description, and so on, and so on.
5. We now need to affiliate the headers from the Excel source file with the headers in the SIMMS database.



**NOTE:** Headers in **bold** must have values or the import cannot work (in other words, items cannot be missing any values for these fields); headers underlined must refer to unique values in the source document (in other words, if the source file has two items with identical Item Codes, the import will not be performed until all Item Codes in the source document are unique). Lastly, some fields contain information that can be updated once it already exists in SIMMS -- in the table below, fields that **cannot** be updated will be shaded.

Table 17 contains the SIMMS table fields into which vendor's catalog information can be imported.

Table 17: Vendor's Catalog - Import into SIMMS

Source Headers	SIMMS Vendor's Catalog Table Headers	✓
Item Code	<u>Item Code</u>	
Item Description	<u>Item Description</u>	

Table 17: Vendor's Catalog - Import into SIMMS

Source Headers	SIMMS Vendor's Catalog Table Headers	✓
Category	Category	
Unit of Measure	Unit of Measure	
	Vendor Name	
	<u>UPC</u>	
	Price	
	Cost	

### Affiliating Source Vendor's Catalog Fields to SIMMS Vendor's Catalog Fields



6. Select each Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The **Source Table Field** name will then appear in the Simms\_Field column.
9. Repeat steps 6-9 for every other Source Table Field value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click **Import**.

Upon your next log into the target database in SIMMS, the new data will exist.

## Updating Data in SIMMS

Various types of data can be updated in SIMMS using the **Visual Import Manager**.

**NOTE: Transaction updates, such as for purchase orders, quotes and sales orders are NOT updatable.**

1. In the **Source Tables** field, we see the source file that contains the data we want to update.
2. In the **Source Table Fields** pane, we see the details in the source file that can be imported by viewing the Yes entries in the Updatable column.
3. In the **SIMMS Table** drop-down list, we have selected the target table in SIMMS that will receive the imported information.
4. In the right pane, we can sort the rows by clicking on the Updatable header, which brings those rows to the top of the grid display.
5. We now need to affiliate the headers from the source file with the headers in the SIMMS database.
6. Select each updatable Source Table Field name one at a time then click the corresponding line in the SIMMS Table Fields pane.
7. While both are selected, click the right icon .
8. The Source Table Field name will then appear in the Simms\_Field column.
9. Repeat steps 6-8 for every other **Source Table Field** value. If any selections get affiliated incorrectly, select them in the right pane then click the left icon  to remove them, then affiliate the correct Source Table Field with the correct Simms\_Field row as described above.
10. Once finished, click Import. Upon your next log into the target database in SIMMS, the updated data will exist.