



WinSIMS - Business & Service Management Software

WinSIMS is the core program in a range of software, widely praised for its user friendliness and continuing product development. WinSIMS is designed to help you manage your business and is used by Fire Protection, Security and a range of other companies throughout the UK and Ireland.

Our business management software provides you with -

- a customer and site management database with no limit to the number of records you may enter
- postcode and bank details lookup via PostCodeAnyWhere
- contract renewals & maintenance scheduling (with overdue reminders)
- several engineer diaries to keep control of your outstanding work load and to record engineers' holidays and other absences
- a full history of each site's call-out and routine maintenance visits
- the ability to invoice from the client's record
- the facility to print numerous standard and management reports, including the printing of NSI and BAFE certificates
- an integrated Microsoft Word mail merge link, enabling you to create standard letters and mail shots (by post or email)
- a full audit trail of nearly all record changes, including when mail-merge documents were created, when annual charges were updated (and by how much), when the police status changed, in short: who changed what when.
- statistical and management information on maintenance achievements, call-out response, false alarm statistics, annual workload, projected income, and much more
- the facility to leave messages for yourself, someone else or for everyone – with a reminder popping up at your chosen date and time
- our WinACCOUNTS package or a link to your accounts package (Currently Sage 50 Accounts, Sage 200 Accounts, QuickBooks Pro and Pegasus Opera – a link to Xero Accounts is being worked on - and other links can be catered for). This:
 - enables you to issue single or batch recurring and callout invoices
 - will automatically update your accounts when adding new clients in WinSIMS
 - allows you to reprint invoices from WinSIMS when required
- e-mail facilities direct from the client record
 - store an unlimited number of email addresses
 - send emails, PDF or HTML reports to clients or engineers
 - send batch and one-off invoices, purchase orders, maintenance reminders, call confirmations and other messages via email
 - send text messages to your clients (uses the email function, plus your own account with an email-to-SMS provider)
- a link to Google Maps™ that enables you to print out clients' location maps. (The link to Google-Maps requires your computer to have access to the Internet.)

WinSIMS is a proven business system that is reliable, comprehensive and has been installed at over 400 sites in the UK and the Republic of Ireland, of which the majority has the ISO 9001 quality standards accreditation.

An example of a typical security, fire, access control and CCTV installation and maintenance company screen setup. Most labels can be personalised and adapted to other industries.

WinSIMS: Installation Record:1

Gigglesworth & Sons

Redcoat House
Bath Road
Kelston
Somerset

Inv Address? P/code BA1 9EY

Customer: GIGGL002
Site: 124 Inst: ALRM
Ref/Contract: GIG002/1

Direct Debit

Phones: 1 01225 822 844 2 0771 563 956 Fax

Balance: £154.20

On Contract: 1
Attend Status: 1
Renewal due: 24/11/2017
Maintenance due: 24/05/2017

Restricted access - see Notes

Customer's ID: Store 124
Response / SLA: A) 4 hour response

Disconnections: Maintenance
Engineer Actions (2)
Office Actions
Customer Actions (1)

Allow (hr): 1.00 Inter-mediate
No of Eng: 1
Appoint? RSC
Rotation No: 2

Frequency: 6 Months
DoW: None
Area: B: 6
Rotation No: 2

Customer's ID: Store 124
Response / SLA: A) 4 hour response

Disconnections: Maintenance
Engineer Actions (2)
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Contract: Inv Address: Police / Monit: Keyholders: Site Visits: Notes: Reg Invs: Spec: Docs: Accounts

Premises: B) Commercial
Installation: EB) Intruder & Hold-up Alarm, PD6662 + DD2
Signalling: EE) BT RedCARE
Panel: Pyronix Euro 280
Installed: 24/11/2014 by ACAND
Reset Meth: Remote Reset
Verification: Sequential
System No: 1357924
URN: S246801
PA URN: S246801P

WinSIMS - Expand your business potential

WinSIMS has a range of integrated modules that can increase your company's control, efficiency and profitability.

Below are brief descriptions of program add-ons designed to integrate with WinSIMS; helping you to manage your business better and to prepare your company for future growth. We can write bespoke links to most software not mentioned in here.

WinSPECS

WinSPECS, our **proposal and quotation** program allows you to: manage your prospective customers, from the point of receiving the sales enquiry to closing that sale

- import data from WinSIMS to prepare quotes for existing clients
- prepare and print sales appointments, risk assessment forms, quotations, kit lists, technical specifications, commissioning forms, etc.
- enter follow-up dates and create reminder alerts accordingly
- automatically export all relevant data (including equipment installed, notes, specification and other correspondence) into the WinSIMS customer database
- prepare multiple quotes for prospects and existing clients
- prepare 'quick quotes' from within WinSIMS for small works, usually as a result of maintenance visits
- calculate theoretical profitability and commission
- calculate the quiescent and active current drains of an installation
- raise automatic purchase orders to multiple suppliers from an accepted quote

WinSPECS comes with Stock File Maintenance, which is a subsection of WinSTOCK, our full stock control program. Stock File Maintenance allows you to enter details of the products you use in your quotations. WinSPECS uses those details to create the specification and to calculate the quotation values and costs.

WinSTOCK

WinSTOCK is our **stock and purchase control** package that

- creates purchase orders, which can be printed or emailed
- provides the inventory list that WinSPECS uses to calculate quotation values and costs
- can be linked to WinSIMS for product invoicing
- keeps track of stock issues, outstanding orders, inventory and stock values by stock location (which can include engineers' vehicle stock)
- allows issuing to your stores or directly to jobs
- can keep track of the profitability of jobs (when linked with WinSIMS through Job Costing)
- contains many built-in reports that can help you controlling your stock:
 - price lists
 - stock valuation and turnover reports
 - order proposal listing
 - purchases by supplier
 - stock issues by customer, and many more

WinSIMS Project/Job Costing

This highly adaptable module widens the scope of WinSIMS and WinSTOCK. Its key function is to link all goods and labour costs to invoicing, thereby **calculating the profitability of a job** or project.

Depending on requirements, any of the following items may be allocated as often as required against a live job:

- sales invoices
- pro-forma invoices (payment applications)
- engineers' time
- expenses such as travel costs, etc.
- site visits
- stock issues
- purchase invoices

Engineers' time and items, such as travel expenses, are treated as non – diminishing stock items.

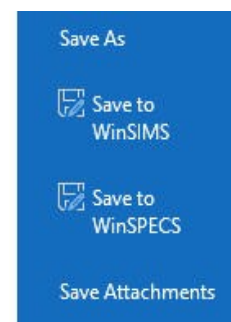
Whilst most parts of the system are common, we recognise that in this area above all, each organisation has its own agenda and requirements and therefore the philosophy is that the last 20% of the system is tailored to each customer. Much also depends on the accounts system that is used.

Save to WinSIMS / WinSPECS...

Our **document management** software allows you to

- save any file using 'drag & drop' to your WinSIMS, WinSPECS and WinSTOCK supplier records
- view those scanned documents or saved files from any WinSIMS client
- save MS Word, Excel, Visio and Outlook files directly into your WinSIMS and WinSPECS customer records, enabling you to:
 - keep copies of site drawings, contracts, quotations, etc.
 - save a copy of all emails, received or sent, with the client's record
 - keep copies of all correspondence without having to search in filing cabinets

A sample of *Save to WinSIMS...* in Outlook Office 365



WebSIMS

This software, installed on an on-site, ACA Systems supplied server, **enables your clients to access a subset of their WinSIMS records and book maintenance appointments** remotely. The client has no direct access to your WinSIMS data or server, WinSIMS sends a subset to a separate webserver, provided by ACA Systems. Access is by password (provided by you)

- access is restricted to the client's own site(s) details
- you can limit the access to certain WinSIMS areas only, usually:
 - the main name and address screen
 - outstanding jobs in the diary
 - completed site visits
 - Add, remove and update keyholders
 - selected stored documents

WinDD

WinDD is our **direct debits** program. Through this module, WinSIMS can create direct debits items automatically for one-off and batch invoices.



The module produces the file used by your BACS or bank's transmission software to generate automatic direct debit items and to allocate receipts. It will link to most of the external accounts packages listed on the last page and send assumed DD payments to that accounts package.

WinTAPI - telephone integration

This module connects WinSIMS to your 3CX, Avaya, BT, Mitel, Panasonic or other LAN-based TAPI telephone system.



- when a call comes in and WinSIMS (or WinSPECS) finds the number in a site record, that site's record will pop-up automatically, saving valuable response time to incoming calls.
- make outgoing calls by simply clicking on one of the phones numbers stored in the client's, keyholder's, contact's, agent's or prospect's record.

Reach!

We supply this software on an ACA Systems supplied, pre-loaded web-server computer that links WinSIMS in the office with the engineers in the field via their **Android smartphones or tablets**. Some advantages are:

- | | |
|--|--|
| Reduced costs | <ul style="list-style-type: none"> • eliminate paperwork for engineers • customers sign on the mobile device |
| Increased productivity and efficiency | <ul style="list-style-type: none"> • no engineers' dockets to file • engineers need not visit your office to collect new job sheets and hand in their completed ones • office staff no longer type site visit information into WinSIMS • send jobs to engineers direct from the callout logging screen • allocate the job to the engineer nearest to the client • mobile devices are capable of holding technical manuals • engineers can be forced to complete a risk assessment • for after-hours calls the engineer can check the customer's account status, system status and check if the client is 'On Stop' • the engineer can see and edit equipment installed at the site • the engineer can issue stock via his mobile device (thereby updating his van stock) and return site photographs with the job. • one-click dialling to clients, semi-automatic text messages to clients |
| Improved cash flow | <ul style="list-style-type: none"> • no more waiting for engineers to hand in their worksheets: invoice the job on the day the work is carried out. (The information sent by the engineer can include parts used and travel time.) |
| Better management controls | <ul style="list-style-type: none"> • view the current job status in the Engineers' Diary, which gets updated whenever the engineer sends a key message • review completed work before allocating to client's record • view engineers' locations in MapPoint (optionally at additional cost) • get management reports, including time sheets |

Email/eReports

Email/eReports is a very powerful feature and is included in most modules. It allows you to send one-off and batch invoices, purchase orders, semi-automatic confirmation emails of client calls, maintenance visit reminders, marketing material, automatic Reach! job reports, etc. by email (text or HTML) automatically and – if using WinACCOUNTS - statements too can be emailed in bulk. Your savings in postage are substantial. *This module is now included FOC with WinSIMS.*

WinACCOUNTS

WinACCOUNTS works in combination with WinSIMS. It helps you to manage Sales, Purchase and Nominal Ledgers and allows for the production of a set of Final Accounts: Trial Balance, Profit & Loss Statement and Balance Sheet, as well as providing you with the necessary data to complete your VAT Return. (There is a Make Tax Digital module.) You can email invoices and statements direct from clients' records. The WinSIMS Accounts module will adequately serve the needs of a small company that does not require multiple current accounts, foreign currency handling, multi-company accounting or sophisticated procedures for handling depreciation, budgeting and so on. WinACCOUNTS can also be set to export invoice data to a Xero Accounts Import file.

WinSIMS – Other accounts links

If you have **Pegasus Opera II or III, QuickBooks Pro, Sage 50 Accounts** or **Sage 200 Accounts** (and other account packages can be catered for), WinSIMS can link into to your accounts package in real time. For example, the link to Sage 50 Accounts link uses Sage 50's own SDO and



- enables WinSIMS to issue single invoices and credit notes and batch invoices, adding the data to the Sage 50 Invoice Posting file (thus giving your accountant control over the posting within Sage).
- can automatically insert or update your accounts information when changing key details in or adding new clients to WinSIMS
- allows you to view and reprint / email invoices from WinSIMS when required
- puts a WinSIMS account 'On Stop' when the account status is 'On Hold'
- will display the Account Status
- keeps WinSIMS updated with the latest account balance
- allows WinSIMS to link to (Sage 50) foreign currency invoicing
- enables a single WinSIMS database to link to up to nine Sage 50 companies

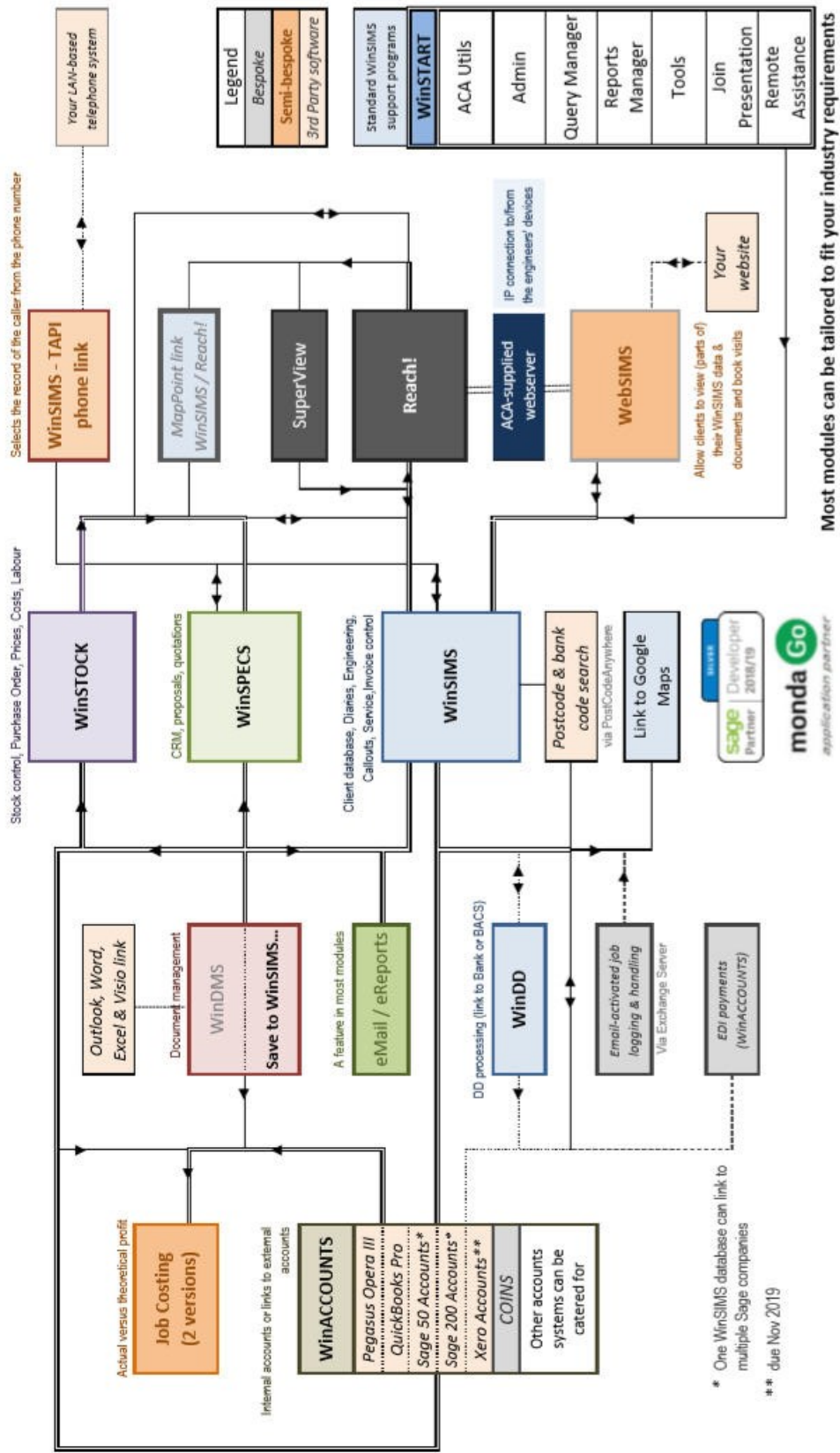
Fewer features are available for QuickBooks. Contact us for more information.

ACA Systems is an independent company that has provided impartial and appropriate solutions to service and maintenance industries since 1994. In addition to our ready-made, yet flexible and adaptable software modules, we write bespoke programs to link WinSIMS and its related software modules to other elements of your business, such as external CRM packages, larger accounting packages (e.g. COINS), Exchange Server or EDI.

Telephone us on +44 191 580 0010 or send an email to sales@acasystems.co.uk for further details.

WinSIMS software and modules

ACA Systems



Relationships Between Modules - Overview

* One WinSIMS database can link to multiple Sage companies
 ** due Nov 2019

Minimum technical requirements

Please note that the following is only a minimum guideline. Contact us if you have any doubts about the suitability of your computers, your network or both.

WinSIMS will run on both 32 and 64-bit operating systems. The operating system of the computer acting as the WinSIMS server should be Microsoft Windows 2008 Server onwards or Windows 8 Professional or later. (Please note that the Windows 8 and 10 Professional allow a maximum of 10 users. WinSIMS software cannot be installed to a compressed drive.

Recommended minimum free disk space is 5 GB. Allow an additional 10 GB disk space if using Document Management. (Note that disk space requirement will grow as time goes on.) Consideration should be given to RAID arrays of disks for improved reliability and speed, UPS provision and a backup system should be in place. Minimum server memory requirement is 4GB (64-bit) but your programs will only run properly with 8GB or 16GB on 64-bit PCs with Windows 8.1 or 10 operating systems.

Suitable operating systems for client machines are Windows 8 or later and must be the Professional version. Memory requirements are as stated above. Although WinSIMS will run with Intel i3 processors, we recommend i5 processors for most PCs and i7 processors (or AMD equivalents) with 16 GB memory for PCs that produce batch invoices (callout and recurring), batch Reach! reports, large external queries in Query Manager and some management reports. Check that your display monitor is suitable for the computer to which it is attached and that the correct drivers - matching the make and model of the monitor - are installed. In general, monitors less than 3 years old, particularly if attached to Windows 10, should fulfil all requirements.

Storing WinSIMS on non-Windows operating systems ('OS'), for example...

- Network-attached storage (NAS), a data storage device attached to a network
- Drop-box, OneDrive or similar Cloud services to store files
- Linux, an open source operating system (OS) or Mac OS X, Apple's OS.

... is not tested and therefore not supported. All can be used for back-ups but should not be used to run WinSIMS; we cannot help with performance issues when the software is not installed locally on a computer with a Windows OS.

- Your Microsoft Office programs must be installed as 32-bit; the 64-bit version is not suitable
- WinSIMS (along with many other programs) does not support, other than in a basic way, touch-screen use.