eci | MAX™

CUSTOM CRYSTAL REPORTS FOR MAX

2021

For Crystal Reports XI through 2013

For MAX v5.5.3 through v5.6.x

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
01 - Engineering				
Bills of Material				
bom.rpt	**Multi-Level BOM Report w/MPN**	William R. Elder, CPIM	38,400	08/21/20 6:17 am
	This report lists a multiple level BOM (up to fou levels) for a user-defined parent part identifier. It shows the MPN for purchased parts.			
bom_1lev.rpt	**Single-level BOM**	William R. Elder, CPIM	32,768	08/21/20 6:13 am
	This report lists a single level BOM for a user-defined parent part identifier.			
bom_8lev.rpt	**8-Level BOM Report**	William R. Elder, CPIM	47,104	08/21/20 6:10 am
	This version of the multiple level BOM report shows up to 8 levels deep.			
bom_with_reference_desg.rpt	**Multi-Level BOM Report w/ Ref Designators**	William R. Elder, CPIM	37,888	08/21/20 6:18 am
	This report lists a multiple level BOM (up to fou levels) for a user-defined parent part identifier. It shows the Reference Designators from the Product Structure Reference field.			
bom1.rpt	**Multi-Level BOM Report**	William R. Elder, CPIM	38,912	08/21/20 6:23 am
	Modifed to only show one part type code.			
bomcumlt.rpt	**Multi-Level BOM Report w/Lead-time**	William R. Elder, CPIM	41,984	08/21/20 6:23 am
	This report lists a multiple level costed BOM (up to five levels) for a user-defined parent part identifier. It also shows the lead-time for the BOM. Modified by Dick Sigrist @ Analog Devices			
bomrtg.rpt	**Multi-Level BOM Report w/Routing**	William R. Elder, CPIM	112,640	08/24/20 1:48 pm
	This report lists a multiple level costed BOM (up to four levels) for a user-defined parent part identifier. In between each level, it shows the part routing data.			
comcdeck.rpt	**Commodity Code Check**	William R. Elder, CPIM	29,696	08/21/20 6:02 am
	This report summarizes all of the commodity codes used in the system. It can be used to compare actual vs. planned codes and fix invalid codes.			
comparts.rpt	**Common Parts**	William R. Elder, CPIM	31,232	08/21/20 6:08 am
	This report counts the number of times a component part is used in a bill of material. It then shows all parts used more than once. It is sorted in descending usage. Sorted by the Number of Distinct Parents.			
consbom.rpt	**Consolidated Bill of Materials**	William R. Elder, CPIM	30,720	08/21/20 6:10 am
	This version of the MAX BOM report which will summarize the quantity of each part used in the BOM, regardless of the level. This report is run from the MAX BOM module – Report – BOM report. Report submitted by Dick Sigrist of Analog Devices.			
consbomrtg.rpt	**Consolidated Bill of Materials With Routings**	William R. Elder, CPIM	49,152	08/21/20 6:09 am
	This is the consolidated BOM report with sub-totals for adding up routing run times. This report is run from the MAX BOM module – Report – BOM report. Report submitted by Dick Sigrist of Analog Devices.			
costed_bom.rpt	**Multi-Level Costed BOM Report**	William R. Elder, CPIM	44,544	08/21/20 6:22 am
	This report lists a multiple level costed BOM (up to six levels) for a user-defined parent part identifier.			
costed_bom_mlt.rpt	**Multi-Level Costed BOM Report**	William R. Elder, CPIM	48,640	08/21/20 6:21 am
	This report lists a multiple level costed BOM (up to six levels) for a user-defined parent part identifier. It shows the costs for the Part Master and from a user-defined Cost Set side by side,			
cstbomrt.rpt	**Single-Level Costed BOM - Rtg Detail**	William R. Elder, CPIM	53,760	08/21/20 6:25 am
	This report shows a single level costed BOM and includes the part routing data.			
hitlist.rpt	**Engineering Hit List**	William R. Elder, CPIM	33,280	08/21/20 6:00 am
	This report lists all engineering status '3' parts (parts on hold) and any supply order (PL, PO, MF, MS) open calling for it out to a user-defined stop date.			
impbom_1lev.rpt	**Single-level Imploded BOM - Where Used?**	William R. Elder, CPIM	32,768	08/21/20 6:12 am
	This report lists a single level, imploded BOM for a user-defined component part identifier. This report may be termed a "where used" report.			
mlcstbom.rpt	**Multi-Level Costed BOM Report**	William R. Elder, CPIM	46,592	08/21/20 6:20 am
	This report lists a multiple level costed BOM (up to six levels) for a user-defined parent part identifier.			
newpart.rpt	**New Parts Added**	William R. Elder, CPIM	30,720	08/21/20 6:00 am
	This report lists all parts that have been entered into the Part Master file as of a user-defined date. It lists the type code, commodity code, material cost and lead-times. It can be used to make certain that these fields are being set correctly as new parts are added.			
newpartdata.rpt	**New Part Data Report**	William R. Elder, CPIM	79,360	08/21/20 6:02 am
	This report lists all key fields from the "part Initiation Form" (PIF) for parts that have been entered into the Part Master file. It can be used to verify data has been entered correctly. Thanks to Jim Redwanowski of NCL for this report.			
partsnotbom.rpt	**Parts Not Used as Components**	William R. Elder, CPIM	30,720	08/21/20 6:08 am
	This report lists part from the Part Master file that have not been used as component parts in the Product Structure file. This list represents parts that may be obsolete (i.e., status 5).			

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
phaseout.rpt	**Engineering Phase Out Report**	William R. Elder, CPIM	33,280	08/21/20 6:08 am
	This report pulls all records in the Product Structure file with zero quantities. It also pulls out the "sister" record (i.e., the part replacing the part designed out). It shows the BOM record, inventory quantities, etc. use it to help manage your start date effective dates.			
prtonhld.rpt	**Parts On Hold**	William R. Elder, CPIM	29,184	08/21/20 6:00 am
	This report prints all parts on hold from the Part Master file. It can be used in conjunction with the Engineering Hit List which shows all orders planned for these parts. It shows Engineering Status =3 or 4 only.			
sr-routing.rpt	**Routing Sub-report**	William R. Elder, CPIM	33,792	10/20/20 3:30 am
	This report pulls standard routing data for a part.			
useup.rpt	**Use Up Report**	William R. Elder, CPIM	52,736	08/21/20 6:07 am
	Engineering Use Up report to manage zero quantity BOM's.			
Bills of Material	Number of Files: 24			

Configurator

cfgorder.rpt	**Order Configuration Report**	William R. Elder, CPIM	51,712	09/09/20 1:48 pm
	Ths report prints the order configurations (like a packing list) for all configured orders for a user defined ship date.			
cfgordermargin.rpt	**Configured Order Margin Report**	William R. Elder, CPIM	37,888	08/21/20 4:23 am
	This report prints the features and options of a configured part and the corresponding price, cost and margin information.			
cfgusage.rpt	**Configuration Usage**	William R. Elder, CPIM	34,304	08/21/20 4:19 am
	This report shows the percentage of time a given option was used on a configured order based upon invoices. It can be used to verify if percentages in planning bills of material are set properly.			
configmargin.rpt	**Configured Margin Report**	William R. Elder, CPIM	43,520	08/21/20 4:23 am
	This report prints the features and options of a configured part and the corresponding price, cost and margin information.			
feabill.rpt	**Feature Bill Report**	William R. Elder, CPIM	29,696	08/21/20 4:19 am
	This report prints the contents of the Qualifier String file (feature bills) of the Configurator module. It prompts the user for a configured part number and shows all parts used in that bill.			
feaoptbom.rpt	**Features / Options Report**	William R. Elder, CPIM	36,352	08/21/20 4:19 am
	This report prints the contents of the Qualifier String file (feature bills) of the Configurator module. It prompts the user for a configured part number and a position to search. It shows all part identifiers associated with that position.			
ordcrossref.rpt	**Order Number Cross Reference**	William R. Elder, CPIM	67,584	08/21/20 4:19 am
	This report prompts for a customer order number and then shows the corresponding master scheduled order number and the features selected for that order.			
Configurator	Number of Files: 7			

Manufacturers Part Control

mpn1.rpt	**MPN Report - By Mfg PN**	William R. Elder, CPIM	68,608	08/21/20 4:12 am
	Multiple Information Report: MPN, BOM, Stock, Requirements			
mpnrpt.rpt	**Mfg P/N Report - By PM PN**	William R. Elder, CPIM	31,232	08/21/20 4:12 am
	Search by Part Master Part ID.			
mpnrpt1.rpt	**MPN Report - By Mfg PN**	William R. Elder, CPIM	31,232	08/21/20 4:12 am
	MPN Search by Manufacturer's PN.			
mpnrpt2.rpt	**MPN Report - by Mfg Description**	William R. Elder, CPIM	30,720	08/21/20 4:12 am
	MPN Search by MPN Description.			
mpnrpt3.rpt	**MPN Search - By PM Description**	William R. Elder, CPIM	31,232	08/21/20 4:12 am
	MPN Search by Part Master Description			
mpnrpt4.rpt	**MPN Report - By Mfg PN**	William R. Elder, CPIM	32,256	08/21/20 4:12 am
	MPN Search by MFG PN. Shows MPN Count > 1. Good for finding duplicate part numbers in Part Master.			
recinsp.rpt	**Receiving Inspection List**	William R. Elder, CPIM	29,184	08/21/20 4:12 am
	This report shows all parts, sorted by the inspection type flag. The inspection flag is placed in the UDF Key field of the Part Master file. "V", indicates a visual inspection is required. "I", indicates that a full incoming inspection is required. "I" types are delivered to inspection, while "V" types go to the primary stockroom.			
recinsp2.rpt	**Receiving Inspection List w/MPN**	William R. Elder, CPIM	33,280	08/21/20 4:12 am
	This report is the same as the receiving report except it only contains parts with MPN data.			
recinsp3.rpt	**Receiving Inspection List - Purchased Items only witⱨ**	William R. Elder, CPIM	31,744	08/21/20 4:12 am
	This report is the same as the receiving report except it only contains purchased parts with MPN data. Shows all approved MPN's.			
Manufacturers Part Control	Number of Files: 9			
01 - Engineering	**Number of Files: 40**			

02 - Customers

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FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME

Advanced Shipping

File	Title	Author	Size	Date / Time
bol.rpt	**Bill of Lading - Short Form**	William R. Elder, CPIM	39,936	08/21/20 6:58 am

A Bill of Lading – Short Form that is slightly different that the form shipped with the MAX Advanced Shipping Module. This report has been formatted for plain paper. Several changes have been made including:
•Shipment summary shows all packaging forms and quantities.
•2nd Carrier used as third party billing information.
•3rd Carrier used as final destination.

File	Title	Author	Size	Date / Time
bol2.rpt	**Straight Bill of Lading**	William R. Elder, CPIM	67,584	09/05/20 8:40 am

A Bill of Lading – Short Form that is slightly different that the form shipped with the MAX Advanced Shipping Module. The detail section has been modified. This report has been formatted for plain paper.

File	Title	Author	Size	Date / Time
BOLpicklist.rpt	**BOL Pick List**	William R. Elder, CPIM	53,760	09/05/20 8:40 am

This version of the BOL Pick List has address fields fixed. It can be run outside of MAX.

File	Title	Author	Size	Date / Time
BOLpicklist2.rpt	**Packing List - Advanced Shipping Module**	William R. Elder, CPIM	54,784	09/09/20 1:55 pm

Another portrait version of the Advanced Shipping Packing List. This report has been formatted for plain paper. Several changes have been made including:
•Sales order due dates added.
•Backorder quantities added.
•Sales order line comments added.

File	Title	Author	Size	Date / Time
cancustoms.rpt	**Canadian Customs Invoice**	William R. Elder, CPIM	44,544	08/21/20 6:45 am

This is a Bill of Lading that provides Canadian Customs Information.

Advanced Shipping	Number of Files:	5

Internal Custom Reports - v5.5.10

File	Title	Author	Size	Date / Time
BOL Invoice.rpt	**BOL Packing List - Portrait - v5.5.10**	William R. Elder, CPIM	140,800	10/20/20 3:42 am

This is a version of the Packing List in Portrait mode modified to be a BOL Invoice. It runs externally to MAX.

Internal Custom Reports - v5.5.10	Number of Files:	1

Sales Order Processing

File	Title	Author	Size	Date / Time
alcust.rpt	**Alpha Customer Listing**	William R. Elder, CPIM	33,280	08/21/20 5:47 pm

This report lists all customers from the Customer Master file in alphabetical order based on company name. It shows the name, address, phones, fax, and contact information for each customer. It was written to facilitate finding a customer identifier in firms with large customer databases.

File	Title	Author	Size	Date / Time
commentlookup.rpt	**Comment Lookup**	William R. Elder, CPIM	32,256	08/21/20 6:16 pm

This report does a search into sales order comments.

File	Title	Author	Size	Date / Time
cpnlookup.rpt	**Customer Part Number Lookup**	William R. Elder, CPIM	31,232	08/21/20 5:49 pm

This report can be used as an inquiry to locate a customer's part number and your internal part number. It has a progressive search field that compares the string typed with the customer part ID field.

File	Title	Author	Size	Date / Time
cpnlookupbycust.rpt	**Customer Part Number Lookup - By Customer ID**	William R. Elder, CPIM	31,232	08/21/20 5:50 pm

Another version of the customer part number look up report that can be used as an inquiry to locate a customer's part number and your internal part number. IT prompts for the customer ID and displays all parts associated with that customer.

File	Title	Author	Size	Date / Time
csttaxnbr.rpt	**Customer Tax Number Listing**	William R. Elder, CPIM	29,184	08/21/20 6:11 pm

This report is similar to the alpha customer listing except it shows customers and their tax numbers (or not).

File	Title	Author	Size	Date / Time
customerbilltolabel.rpt	**Customer Bill To Label**	William R. Elder, CPIM	65,024	08/21/20 5:48 pm

This report is similar to the alpha customer listing except it shows customers and their bill to addresses in a 3 x 10 row label format.
Has option to supress address for file folder labels

File	Title	Author	Size	Date / Time
forecastorders.rpt	**Forecast Order Worksheet**	William R. Elder, CPIM	32,256	08/21/20 5:53 pm

This report lists all status 3 orders forecast orders. See the "Master Scheduling" reports area for more forecast order reports.

File	Title	Author	Size	Date / Time
newcust.rpt	**New Customer Listing**	William R. Elder, CPIM	33,280	08/21/20 5:47 pm

This report is similar to the alpha customer listing except it only shows customers added after a user-defined date.

File	Title	Author	Size	Date / Time
pricelist.rpt	**Customer Price List By Type**	William R. Elder, CPIM	29,184	08/21/20 5:49 pm

Another version of the customer price report.

File	Title	Author	Size	Date / Time
pricelist2.rpt	**Customer Price List**	William R. Elder, CPIM	30,720	08/21/20 5:49 pm

This report shows list pricing from the part/sales file and then all customer based prices for each part.

File	Title	Author	Size	Date / Time
salesanalysis.rpt	**Sales Analysis**	William R. Elder, CPIM	36,352	08/21/20 6:00 pm

This report summarizes sales activity.

File	Title	Author	Size	Date / Time
salescard.rpt	**Sales Card Report**	William R. Elder, CPIM	129,024	08/21/20 5:50 pm

This report is very similar to the Purchasing Buycard report, except that it shows all of the sales information of a part that is sold.
This report includes Standard Sales Notes introduced in v5.0.

File	Title	Author	Size	Date / Time
shipmast.rpt	**Customer Information - Shipping Master**	William R. Elder, CPIM	29,184	08/21/20 5:48 pm

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	This report is similar to the alpha customer listing except it shows the shipping addresses of customers.			
standardpricelist.rpt	**Standard Price List**	William R. Elder, CPIM	30,720	08/21/20 5:59 pm
	This report lists the lis price and then the quantity breaks and accounts.			
Sales Order Processing	Number of Files: 14			

Sales Order Processing - Backlog

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
agedbklg.rpt	**Aged Backlog Report**	William R. Elder, CPIM	34,304	08/21/20 5:54 pm
	A special version of the Backlog by Order report which summarizes backlog in 30, 60 90 days.			
bklgbyat.rpt	**Backlog By Account Type**	William R. Elder, CPIM	38,400	08/21/20 5:51 pm
	This report lists all open orders and displays the order information for each line. It is sorted by account type code and then sales category.			
bklgbycs.rpt	**Backlog By Customer**	William R. Elder, CPIM	33,280	08/21/20 5:55 pm
	This report lists all open orders and displays the order information for each line. It is sorted by customer identifier and then order number.			
bklgbyo2.rpt	**Backlog By Date / Order Report**	William R. Elder, CPIM	43,008	08/21/20 5:55 pm
	This report lists all open orders and displays the order information for each line. It is sorted by order date and then order number.			
bklgbyo3.rpt	**Backlog By Reason / Date / Order Report**	William R. Elder, CPIM	43,008	08/21/20 5:57 pm
	This report is basically the same as the Backlog by Order except it includes the sales order line item notes.			
bklgbyor.rpt	**Backlog By Order Report**	William R. Elder, CPIM	33,280	08/21/20 5:58 pm
	This report is basically the same as the Backlog by Order #2 except it includes the sales order line item notes and a formula that tests for conditions in the sales order comments.			
bklgbypn.rpt	**Backlog By Part ID Report**	William R. Elder, CPIM	36,352	08/21/20 5:56 pm
	This report lists all open orders and displays the order information for each line. It is sorted by sales category and then part identifier.			
bklgbytr.rpt	**Backlog By Sales Territory**	William R. Elder, CPIM	33,792	08/21/20 5:56 pm
	This report lists all open orders and displays the order information for each line. It is sorted by sales territory and then by customer.			
bklgcred.rpt	**Backlog By Order Date - Credit Memo's Only**	William R. Elder, CPIM	32,768	08/21/20 5:57 pm
	This report lists all open orders and displays the order information for each line. It is sorted by sales category and then part identifier.			
Sales Order Processing - Backlog	Number of Files: 9			

Sales Order Processing - Bookings

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
bkconsm.rpt	**Product Contribution Report Based Upon Bookings**	William R. Elder, CPIM	35,840	08/21/20 6:15 pm
	This report lists all orders booked in a user-definable date range and displays the selling and cost information, as well as, the contribution margin. It is a summary report by product family.			
bookbyat.rpt	**Bookings By Account Type Code**	William R. Elder, CPIM	37,888	08/21/20 6:09 pm
	This report lists all orders booked in a user-definable date range and displays the order information for each line. It is sorted by item class (i.e., commodity code) and then by part identifier. The total section calculates the average price for an order.			
bookbycs.rpt	**Bookings By Customer**	William R. Elder, CPIM	35,328	08/21/20 6:10 pm
	This report lists all orders booked in a user-definable date range and displays the order information for each line. It is sorted by customer type and then by customer. The total section calculates the average price for an order.			
bookbyor.rpt	**Booking By Date / Order Report**	William R. Elder, CPIM	35,840	08/21/20 6:10 pm
	This report lists all orders booked in a user-definable date range and displays the order information for each line. It is sorted by current due date and then order number. The total section calculates the average price for an order.			
bookbypn.rpt	**Bookings By Part Identifier**	William R. Elder, CPIM	37,888	08/21/20 6:11 pm
	This report lists all orders booked in a user-definable date range and displays the order information for each line. It is sorted by sales category and then by part number. The total section calculates the average price for an order.			
bookbytr.rpt	**Bookings By Sales Territory**	William R. Elder, CPIM	36,352	08/21/20 6:11 pm
	This report lists all orders booked in a user-definable date range and displays the order information for each line. It is sorted by sales territory and then by customer. The total section calculates the average price for an order.			
Sales Order Processing - Booking	Number of Files: 6			

Sales Order Processing - Performance

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
ontime.rpt	**On Time Shipment Report**	William R. Elder, CPIM	40,960	08/21/20 6:06 pm
	This report measures Customer Service By Line Item based upon the current due date and the actual date shipped.			
ontime2.rpt	**On Time Shipment Report**	William R. Elder, CPIM	40,960	08/21/20 6:06 pm
	Measures Customer Service By Line Item			
	Shows Orders Not Shipped By Current Due Date			

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FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
ontmeord.rpt	**On-Time Shipments - Total Order**	William R. Elder, CPIM	38,912	08/21/20 6:06 pm
	Uses all lines on the order to determine on time rate vs. individual line items			
service.rpt	**Customer Service Report**	William R. Elder, CPIM	35,840	08/21/20 6:20 pm
	Another verson of an on-time delivery report.			
Sales Order Processing - Performa	Number of Files:	4		

Sales Order Processing - Quotes

quote-so-lookup.rpt	**Quote / SO Lookup**	William R. Elder, CPIM	71,168	08/21/20 6:00 pm
	This report can be used as to find what quotes have been converted to sales orders.			
Sales Order Processing - Quotes	Number of Files:	1		

Sales Order Processing - Sales

allorder.rpt	**All Open Orders**	William R. Elder, CPIM	38,400	08/21/20 6:24 pm
	This report lists all status 3 orders regardless of if they have been shipped or not. It totals the due quantity, as well as, the shipped but not invoiced quantity. It's purpose was to avoid the timing problems between shipping, accounting (invoicing), and reporting. It is sorted by account type and customer.			
custsch1.rpt	**6 Week Customer Schedule**	William R. Elder, CPIM	44,544	08/21/20 6:14 pm
	Shows Current Due Date in Six Week Schedule			
custsch2.rpt	**6 Week Customer Schedule Report**	William R. Elder, CPIM	44,544	08/21/20 6:14 pm
	The report shows open sales order by reason, part description and order number. It then shows the quantity due in a weekly format.			
orderstatus.rpt	**Order Status Report**	William R. Elder, CPIM	71,168	09/09/20 1:58 pm
	This report is an open order report that can be run so that all incoming sales orders may be verified. It is designed in an invoice processing format. In Invoice Posting Format			
purchasedpartssold.rpt	**Purchased Parts Sold**	William R. Elder, CPIM	36,352	08/21/20 6:24 pm
	This report summarizes all purchased parts sold in a period.			
quota.rpt	**Quota Report #1**	William R. Elder, CPIM	34,816	08/21/20 6:24 pm
	This report sorts all incoming orders (bookings) by the REP #1 field in the sales order header. This report is sorted by rep, order, and customer.			
quota2.rpt	**Quota Report #2**	William R. Elder, CPIM	35,328	08/21/20 6:00 pm
	This report sorts all incoming order (bookings) by the REP #2 field in the sales order header. This report is sorted by rep, order, and customer.			
quota3.rpt	**Quota Report #3**	William R. Elder, CPIM	34,816	08/21/20 6:00 pm
	This report sorts all incoming order (bookings) by the REP #3 field in the sales order header. This report is sorted by rep, order, and customer.			
slshist quarter.rpt	**Sales History Report By Quarter**	William R. Elder, CPIM	39,936	08/21/20 6:02 pm
	This report summarizes sales history into Dynamic Quarterly Columns.			
soedups.rpt	**Possible Duplicate Sales Orders**	William R. Elder, CPIM	28,160	08/21/20 6:02 pm
	This report lists open sales orders, sorting them by the Customer PO to verify no duplicates.			
Sales Order Processing - Sales	Number of Files:	10		

Sales Order Processing - Shipping

duesoon.rpt	**Due Soon Report**	William R. Elder, CPIM	34,304	08/21/20 6:20 pm
	Another version of a potential shipping report.			
pick1st.rpt	**Shipping Pick List**	William R. Elder, CPIM	42,496	08/21/20 5:52 pm
	This report prints all orders that were shipped (from computer) including any sales order notes and special information. It is intended to be a log for recording serial numbers, etc. on orders as they leave.			
planship.rpt	**Planned Shipping Report**	William R. Elder, CPIM	34,304	08/21/20 6:07 pm
	This report lists all orders scheduled to be shipped out between a user defined dates. It shows the part identifier and the extended value of each line. The purpose of the report is to anticipate the shipping revenue.			
potship.rpt	**Potential Shipping Report**	William R. Elder, CPIM	35,328	08/21/20 6:07 pm
	This report lists all orders scheduled to be shipped out to a user-defined date. It shows the due quantity if the order is available in the inventory. The purpose of the report is to facilitate the shipping decision.			
potship1.rpt	**Potential Shipping Report #2**	William R. Elder, CPIM	40,448	08/21/20 6:08 pm
	This report lists is similar to the report above, but also shows the next two work orders when ship quantity is less than quantity on hand. Showing Open Work Orders when Req > OnHand			
shipdisc.rpt	**Shipping Discrepancy Report**	William R. Elder, CPIM	34,304	08/21/20 5:52 pm
	This report should be run daily, at the end of the shipping day. It shows all orders that were scheduled to be shipped, that did not go. It has a place for the shipper or inventory person to document the problems experienced with the order. The report should be used to update the order with a new date.			

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
shpinfo.rpt	**Ship To Info By Customer**	William R. Elder, CPIM	33,280	08/21/20 6:22 pm
	This report shows a summary of all shipments shipped by customer.			
shpinfobystate.rpt	**Ship To Info By State**	William R. Elder, CPIM	35,328	08/21/20 6:22 pm
	This report shows a summary of all shipments shipped and provides the total weight amounts. Shows weights by product and state			
shplabel.rpt	**Shipping Label - Basic**	William R. Elder, CPIM	40,448	08/21/20 5:52 pm
	This report prompts for a order number and then prints a shipping label for each line item found on the order. It was formatted for a standard Avery 4.00wx 2.00h label, but could be easy changed.			
whership.rpt	**Where Shipped Report**	William R. Elder, CPIM	37,888	08/21/20 5:51 pm
	This report shows invoice header information for all invoices in a user-definable date range. It also shows the ship to location for each invoice (if any), the invoice value, and the standard cost.			

Sales Order Processing - Shipping	Number of Files:	10

Warranty Tracking

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
agedrma.rpt	**Aged RMA Report**	William R. Elder, CPIM	29,696	08/21/20 5:48 am
	This report lists all open RMA's and displays the data by the due date. This report is important as many RMA's that are opened, are never received back from customers!			
openrma.rpt	**RMA Report**	William R. Elder, CPIM	38,912	08/21/20 5:48 am
	This report lists the detail from the RMA file. It can quickly be modified to show open, received, or completed by adding a selection formula for the status code.			
repwocost.rpt	**Repair Order Cost Report - Summary**	William R. Elder, CPIM	54,272	08/21/20 5:48 am
	This report shows the cost of rework work orders (indicated by "RMA" in the order reference field), including material, labor and overhead.			
rmacost.rpt	**RMA Work Order Cost**	William R. Elder, CPIM	67,584	09/09/20 2:53 pm
	Another version of a costed work order report for warranty repairs.			
shiphist.rpt	**Ship History Report**	William R. Elder, CPIM	31,232	08/21/20 5:48 am
	This report lists all ship history records for a user defined date range.			
warparts.rpt	**Warranty Parts Report**	William R. Elder, CPIM	30,720	08/21/20 5:48 am
	The report lists all parts in the Part Sales file and their respective warranty information.			
warpercentage.rpt	**Warranty Returns Percentage Report**	William R. Elder, CPIM	45,568	08/21/20 5:48 am
	This report shows invoices that have a reason code of "WR" (warranty) and shows the warranty cost as a percentage of total cost.			

Warranty Tracking	Number of Files:	7

02 - Customers	**Number of Files:**	**67**

03 - Scheduling

Master Production Schedule

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
dlystat.rpt	**Daily Status Report**	William R. Elder, CPIM	53,760	08/21/20 10:19 am
	This report allows a given llist of parts to be analyzed (i.e., onhand - nettable and non-nettable, open orders and open requirements. It is sort of like the MRP detail screen, but does not contain a projected available balance.			
forecast.rpt	**Forecast Worksheet**	William R. Elder, CPIM	32,256	08/21/20 10:00 am
	This report shows all forecast orders currently in the system. The report is sorted by part identifier and then due date of the order. It can be used to verify that the input to the system matches the production plan.			
lincnt.rpt	**Total Parts Sold By Line Count**	William R. Elder, CPIM	34,304	08/21/20 10:26 am
	This report counts each part number sold on an invoice and shows the number of lines (frequency) and the total number sold. It is handy to estimate quantities and multiples.			
mfgsched1.rpt	**MFG Schedule**	William R. Elder, CPIM	52,224	08/21/20 10:10 am
	This report shows all open customer order quantities, on hand information, and corresponding manufacturing orders. The report has been designed for make to order companies so they can make certain that supply and demand are in balance. SO Backlog and Corresponding MF			
monthlyproductiondemand.rpt	**Monthly Production - Demand**	William R. Elder, CPIM	47,104	08/21/20 10:35 am
	This report shows all open customer order quantities, in one column for each day of the month. The report has been designed for make to order companies that use the sales order to drive MRP requirements. Shows open sales orders in daily columns. Used in production planning			
mpsfc.rpt	**MPS & FC Report**	William R. Elder, CPIM	33,792	08/21/20 10:23 am
	Ths report shows open forecasts, cusstomer orders (including consignment), master scheduled and shop orders. It is a snapshot of supply and demand.			
mpsfc1.rpt	**MPS & FC Report**	William R. Elder, CPIM	35,840	08/21/20 10:20 am
	This report shows status 3 forecasdts on master scheduled parts.			
mpslist.rpt	**MPS Worksheet**	William R. Elder, CPIM	33,792	08/21/20 10:20 am
	This report shows open master scheduled orders out to a user-defined cutodd date (current due).			

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
mpsparts.rpt	**MPS Parts**	William R. Elder, CPIM	28,672	08/21/20 9:58 am
	This report lists all Part Type "M" parts in the database. It sorts the list by low level code and then by part identifier. It is used as a control list between the MPS in MAX and production planning which is typically done in Microsoft Excel.			
msordersmissingsalesorders.rpt	**MS Orders Missing Sales Orders**	William R. Elder, CPIM	39,936	08/21/20 10:05 am
	This report shows MPS orders that do not have a sales order number in the order reference field. Assumes Customer Order Number exists in Order Reference Field of Order Master			
mssched.rpt	**Master Scheduling Report 1**	William R. Elder, CPIM	31,744	08/21/20 10:30 am
	This report shows released MS and MF orders for eight weekly buckets.			
mssched2.rpt	**Master Scheduling Report 2**	William R. Elder, CPIM	32,256	08/21/20 10:30 am
	This report shows released MS orders for eight weekly buckets.			
opengallonscapacityreport.rpt	**Open Sales Order Summary In Gallons**	William R. Elder, CPIM	50,176	08/21/20 10:08 am
	This report shows the capacity load from planned, approved and released orders for a user defined date range.			
shopcalendar.rpt	**Shop Calendar**	William R. Elder, CPIM	33,792	08/21/20 10:00 am
	This report lists all master scheduled orders in a "Calendar" format, with one cell per workday. Thanks to Chris Carnell of Honey Bee Manufacturing for this report.			
shopcalendar2.rpt	**MS Shop Calendar**	William R. Elder, CPIM	70,144	08/21/20 10:00 am
	Another version of the shop calendar.			
Master Production Schedule	Number of Files:	15		

Master Production Schedule - Capacity

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
capacity.rpt	**Detailed Capacity Report**	William R. Elder, CPIM	32,768	08/21/20 10:27 am
	This report shows all work scheduled (in hours) through up to three user-definable constrained work-centers. It shows orders planned by the MPS, CRP, (i.e., planned orders), as well as, released orders for these work centers.			
mpswcapacity.rpt	**MPS w/Capacity Report**	William R. Elder, CPIM	55,296	08/21/20 10:28 am
	A version of the master schedule report, but shows capacity information as well.			
plannedcapacity.rpt	**Planned Capacity Report**	William R. Elder, CPIM	43,520	08/21/20 10:29 am
	This report shows the capacity load from planned, approved and released orders for a user defined date range. The report is sorted by work center. A graph showing the load for each work center appears at the top of the page.			
rc_cap.rpt	**Rough-Cut Capacity Planning Summary**	William R. Elder, CPIM	37,376	08/21/20 10:29 am
	This report shows the labor requirements of the master schedule in 8 weekly buckets beginning with a user-defined start date for up to three user-definable constrained work centers. It is most useful when used in the Master Schedule and the Detailed Capacity Planning Report.			
rc_cap_sum.rpt	**Rough-Cut Capacity Planning by Work Center**	William R. Elder, CPIM	61,952	12/31/20 9:38 am
	This report shows the labor requirements of the master schedule in 12 weekly buckets beginning with a user-defined start date for up to three user-definable constrained work centers. It is most useful when used in the Master Schedule and the Detailed Capacity Planning Report. This report also contains a sub-report that pulls earned hours for the same work centers looking back 12 weeks. This allows you to compare future load against past experience. 12 weeks forward & 12 weeks back.			
rc_capwgraph.rpt	**Rough-Cut Capacity Planning w/Graph**	William R. Elder, CPIM	45,056	08/21/20 10:28 am
	This report is the same as the report above, except graphically shows the weekly load and the anticipated capacity available.			
Master Production Schedule - Cap	Number of Files:	6		

Master Production Schedule - Projected Inventory

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
cashflow.rpt	**Supply Summary - Detailed**	William R. Elder, CPIM	33,280	08/21/20 10:26 am
	This report lists all supply orders for purchased items in a tabular format by order type (i.e., PL, PR, SR, PO, and SO) and month due. It provides detail for the Supply Summary report.			
cfsum.rpt	**Cash Flow Summary Report**	William R. Elder, CPIM	33,792	08/21/20 10:24 am
	This report lists all supply orders for purchased items in a tabular format by order type (i.e., PL, PR, SR, PO, and SO) and month due.			
cfsumcu.rpt	**Demand Summary Report - Independent**	William R. Elder, CPIM	34,304	08/21/20 10:25 am
	The report lists all independent demand orders for manufactured items in a tabular format by orders type (i.e., CU) and month due.			
cfsumfc.rpt	**Demand Summary Report - Independent**	William R. Elder, CPIM	32,768	08/21/20 10:02 am
	The report lists all independent demand orders for manufactured items in a tabular format by orders type (i.e., FC, CU) and month due.			
cfsumfc_qt_cu.rpt	**Demand Summary Report - Independent**	William R. Elder, CPIM	33,792	08/21/20 10:25 am
	The report lists all independent demand orders for manufactured items in a tabular format by orders type (i.e., FC, QT) and month due.			
cfsummf.rpt	**Supply Summary Report - Manufacturing**	William R. Elder, CPIM	33,280	08/21/20 10:03 am
	The report lists all dependent demand orders for manufactured items in a tabular format by orders type (i.e., RQ) and month due.			

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
cfsumrq.rpt	**Demand Summary Report - Dependent**	William R. Elder, CPIM	33,792	08/21/20 10:24 am

The report lists all dependent demand orders for manufactured items in a tabular format by orders type (i.e., RQ) and month due.

Master Production Schedule - Pro	Number of Files:	7		

03 - Scheduling	**Number of Files:**	**28**		

04 - Production

Labor Tracking

File	Title	Author	Size	Date/Time
closeout.rpt	**Closeout Report**	William R. Elder, CPIM	34,816	08/21/20 9:36 am

This report prints all sequences on status 4 shop orders that have records posted from the employee work file. It shows the standard time, actual time and deltas for each sequence and allows the same to be calculated for the order.

dailylab.rpt	**Period Labor Report**	William R. Elder, CPIM	34,304	08/21/20 9:39 am

This report prints all time posted into the employee work file for a user definable date range. It displays the shop order standard, employee actual and rate variance between the two. It is sorted by record type so that direct hours and indirect hours are separated.

dlylabem.rpt	**Period Labor by Employee Report**	William R. Elder, CPIM	35,328	08/21/20 9:43 am

This report prints all time posted into the employee work file for a user definable date range. It displays the shop order standard, employee actual and rate variance between the two. It is sorted by record type so that direct hours and indirect hours are separated.

dlylabpn.rpt	**Period Labor by P/N and Employee**	William R. Elder, CPIM	39,424	08/21/20 9:43 am

This report is very similar to the Daily Labor Report by Employee, except it is sorted first by part identifier and then employee. It also shows the efficiency for the job.

empmst.rpt	**Employee Master Report**	William R. Elder, CPIM	28,160	08/21/20 9:35 am

This report lists all employees in the Employee Master file.

ernhrs3.rpt	**Standard Hours Earned Based on Labor Tracking**	William R. Elder, CPIM	33,792	08/21/20 9:40 am

This report is pulls all time posted against work orders in the Labor tracking Employee Work file. It summarizes the standard and actual data by work order.

indbyact.rpt	**Indirect Labor by Account Type Report**	William R. Elder, CPIM	33,792	08/21/20 9:38 am

This report lists all times posted as indirect via the labor tracking module by work center for a user-defined period. It is sorted by work center and account type code. It is useful for troubleshooting the amount of indirect activity reported by a work center.

indirect.rpt	**Indirect Labor Report**	William R. Elder, CPIM	33,792	08/21/20 9:39 am

This report lists all times posted as indirect via the labor tracking module by work center for a user-defined period. It is sorted by account type code.

labbyemp.rpt	**Labor by Employee**	William R. Elder, CPIM	39,936	08/21/20 9:35 am

This report Shows all time posted by employee. Both direct and indirect time are shown on the report. Theoretically, this report for one payroll period should recreate the employee's time sheet.
Direct and Indirect Time

labor_recovery.rpt	**Unplanned Labor Cost Recovery**	William R. Elder, CPIM	37,888	08/21/20 9:41 am

This report is a different version of the earned hours report.

laboractivitybyshoporder.rpt	**Labor Activity by Shop Order**	William R. Elder, CPIM	33,280	09/09/20 1:27 pm

This report is a different version of the earned hours report.

labordata.rpt	**Labor Data Report**	William R. Elder, CPIM	126,976	08/21/20 9:45 am

This report shows all the labor data, including the standard routing. It was constructed to help troubleshoot data issues between labor tables.

laborvardailybyworkcenter.rpt	**Labor Variance Daily By Work Center Group**	William R. Elder, CPIM	48,640	08/21/20 9:44 am

This report is a different version of the earned hours report.

rtperpc.rpt	**Run Time Per Unit Report**	William R. Elder, CPIM	40,960	08/21/20 9:38 am

This report is very similar to the Daily Labor Report by Employee, except it shows the calculations in a slightly different way. It can be used to determine run rates by employee.

timeattendance.rpt	**Time & Attendance Report**	William R. Elder, CPIM	69,632	08/21/20 9:37 am

This report is lists all time and attendance records when using the MDCM T&A feature.

tmetck.rpt	**Time Ticket Data**	William R. Elder, CPIM	32,768	08/21/20 9:37 am

This report lists the summary of all time posted during a user-defined date range. It summarizes direct and indirect time and calculates the utilization rate.

Labor Tracking	Number of Files:	16		

Shop Floor Execution

agedwip.rpt	**Aged WIP**	William R. Elder, CPIM	34,304	08/21/20 11:48 am

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	This report lists all open master scheduled and shop orders from the Order Master file out to a user-defined date. It is used to find old WIP orders. Keeping WIP orders open will inflate WIP inventory and prevent the material, labor, and labor overhead variances from being applied in the proper period.			
compinwip.rpt	**Component Parts in WIP**	William R. Elder, CPIM	65,536	08/21/20 11:48 am
	This report is will help determine if a part is in WIP (i.e., has it been issued to an open work order. This will help you locate and re-allocate component inventory.			
jobprogress.rpt	**Job Progress Report**	William R. Elder, CPIM	31,744	08/21/20 11:59 am
	This cross-tab report can be used to help what quantities are in what work centers based upon the Job progress table.			
kitinquiry.rpt	**Kit Inquiry Report**	William R. Elder, CPIM	41,472	08/21/20 11:58 am
	This report shows if enough material is available to kit "x" amount of a user definable part number. The report also shows incoming supply orders which will help expedite material shortages.			
mflist.rpt	**Open Shop Orders**	William R. Elder, CPIM	31,744	08/21/20 12:00 pm
	THis report lists all status 3 (open) Shop Orders.			
ontimemfg.rpt	**Ontime Manufacturing Report**	William R. Elder, CPIM	37,376	08/21/20 12:00 pm
	Assumes all orders have only one receipt record. This report calculates the on time percentage for work orders. It compares the date received into stock vs. the current due date of the order.			
picklst.rpt	**Pick List - Generic**	William R. Elder, CPIM	35,840	08/21/20 11:48 am
	This report is a generic pick list for released shop orders. It can be easily modified for MS or MF types only. It currently prompts for one order number.			
priority.rpt	**Priority Report**	William R. Elder, CPIM	48,640	01/01/21 8:52 am
	This report can be used to help determine priorities on the shop floor for release work order It calculates four different priority formulas (Slack Time, Critical Ratio, Manufacturing Lead Time Remaining, and Priority Time Remaining). It reports from all sequences where the queue code is not "C", complete.			
routingchange.rpt	**Routing Definition & Change**	William R. Elder, CPIM	32,256	08/21/20 12:02 pm
	THis report was written to review part routing data after it was loaded. It prompts for a part number range and then shows the routing data in a worksheet data where it can be marked up and renetered.			
rtgcost.rpt	**Routing Cost Report**	William R. Elder, CPIM	33,792	08/21/20 11:46 am
	This report prints the contents of the Part Routing file, showing time standards and costs.			
rtgcsttnx.rpt	**Routing Cost Report**	William R. Elder, CPIM	46,592	08/21/20 11:46 am
	Shows part routings for manufactured parts that have sales order shipments within the period specified.			
rtgnotes.rpt	**Standard Routing Notes**	William R. Elder, CPIM	28,672	08/21/20 11:47 am
	This report lists all of your standard routing notes.			
scrap.rpt	**Scrap Analysis**	William R. Elder, CPIM	33,792	08/21/20 12:01 pm
	This reports summarizes all scrap transactions from Transaction History from all forms of scrap.			
scrap2.rpt	**Scrap Expense Report**	William R. Elder, CPIM	34,304	08/21/20 11:58 am
	This report pulls all "Y" transactions from the transaction history file and extends the value of the transactions. It also pulls transactions with the "SCR" or "RTV" general ledger references, putting all scrap expense onto a single report. Sorted by dollars.			
scrap3.rpt	**Scrap Expense Report**	William R. Elder, CPIM	33,792	08/21/20 11:57 am
	Like the scrap expense report above, except it is reported by part identifier.			
sfanalysis.rpt	**Shop Floor Analysis**	William R. Elder, CPIM	37,376	08/21/20 11:57 am
	This report shows actual vs. standard labor posted against work orders. The report was intended to be used to determine where standard labor standards need to be adjusted. It reviews run time only, but can easily be changed for setup time.			
sfceffic.rpt	**Shop Floor Efficiency**	William R. Elder, CPIM	38,400	08/21/20 11:57 am
	A summary version of the Shop Floor Efficiency Report.			
sfceffic2.rpt	**Shop Floor Efficiency Report by Order**	William R. Elder, CPIM	34,304	08/21/20 11:56 am
	Open orders only (in progress). Another version of the above efficiency report. This version only looks at the open portion of the work orders (status 3).			
sfceffic3.rpt	**Shop Floor Efficiency Report by Part**	William R. Elder, CPIM	34,816	08/21/20 11:56 am
	Another version of the above efficiency report. This version is sorted by part number and then order number.			
sfcefficsm.rpt	**Shop Floor Efficiency**	William R. Elder, CPIM	39,936	08/21/20 11:56 am
	This report shows the standard run and setup times, planned run and setup times and actual run and setup times for all status 4 orders. It only shows the hours associated with the variance and not costs. It is helpful for reviewing and updating standard routing times.			
sfetnx2.rpt	**Display SFC Transactions w/ Labor**	William R. Elder, CPIM	32,256	08/21/20 11:55 am
	This report is another version of the Display SFE Transactions. It shows the actual run and setup time posted against the order.			
sfetnx3.rpt	**Display SFC Transactions w/ Labor**	William R. Elder, CPIM	31,744	08/21/20 11:55 am
	This report is another version of the Display SFE Transactions.			
sfetnx4.rpt	**Display SFC Transactions w/ Labor & Material**	William R. Elder, CPIM	43,520	08/21/20 11:55 am

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	This report is another version of the Display SFE Transactions. It contains a sub-report that shows material transactions for the order.			
shortage.rpt	**Short Term Shop Order Shortages**	William R. Elder, CPIM	45,568	08/21/20 11:54 am
	This report lists all status three work orders and the corresponding pick list. For each of the components, it shows the quantity due, the on hand quantity and any open purchase orders out to a user defined date.			
shortage prefix.rpt	**Short Term Shop Order Shortages**	William R. Elder, CPIM	46,592	08/21/20 11:54 am
	This is another version of a report lists all status three work orders and the corresponding pick list. For each of the components, it shows the quantity due, the on hand quantity and any open purchase orders out to a user defined date.			
sothrput.rpt	**Shop Order Throughput**	William R. Elder, CPIM	45,056	08/21/20 11:53 am
	This report shows the total time a work order was open (e.g., the received date less the order date). It can be used to determine the average time work orders move through your manufacturing process.			
wcdetail.rpt	**Workcenter Detail Report**	William R. Elder, CPIM	34,304	12/22/20 2:08 pm
	This report lists all released orders in a work center, one page per work center. The work is subtotaled into work that is in progress and work that is waiting and shows all orders and sequences. The report also shows the load and queue information for each work center.			
wcdetail-byrawmaterial.rpt	**Work Center Detail by Raw Material**	William R. Elder, CPIM	35,328	08/21/20 11:49 am
	This is probably one of the busiest reports on this web site. It reports status three (released) work orders by work center. This version however sorts the released jobs by raw material used, which helps eliminate material changeovers.			
wcdetail-fab.rpt	**Fab Workcenter Detail Report**	William R. Elder, CPIM	101,888	12/22/20 2:06 pm
	This is probably one of the busiest reports on this web site. It reports status three (released) work orders by work center.			
wcdetailwgraph.rpt	**Workcenter Detail Report**	William R. Elder, CPIM	41,984	08/21/20 11:50 am
	This report is similar to the work center detail report except it summarizes the capacity for each work center and displays that data in a graph.			
wcdetbkt.rpt	**Workcenter Detail Report**	William R. Elder, CPIM	37,888	08/21/20 11:53 am
	This report is similar to the work center detail report except it summarizes the work into eight weekly buckets.			
wcdetbkt1.rpt	**Workcenter Detail Report #1**	William R. Elder, CPIM	38,912	08/21/20 11:52 am
	Another version of the Work Center Detail report that shows setup instead of actuals. It uses a 16 week horizon.			
wcdetsum.rpt	**Workcenter Detail Report - Summary**	William R. Elder, CPIM	34,304	08/21/20 11:51 am
	This report shows in summary the load and queue information for all work centers.			
wocheck.rpt	**Work Order Check**	William R. Elder, CPIM	74,752	08/21/20 11:50 am
	This report is was written to show if completed work orders have had their material transactions processed properly. The report shows over issues, shortages and invalid statuses. This report should be run before any order is post order closed to status 5.			
wrkmst.rpt	**Work Center Master**	William R. Elder, CPIM	27,648	08/21/20 11:45 am
	This report prints the contents of the Work Center Master file.			
Shop Floor Execution	Number of Files:		35	

Subcontract Processing

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
porecs1.rpt	**Subcontraact Purchase Receipts**	William R. Elder, CPIM	35,840	08/21/20 8:48 am
	This report shows the value of the subcontract receipts (from the PO Receipts file).			
servmst.rpt	**Service ID Listing**	William R. Elder, CPIM	26,112	08/21/20 8:40 am
	This report produces a listing of service identifiers.			
servord.rpt	**Service Order Report**	William R. Elder, CPIM	41,984	08/21/20 8:44 am
	This report produces a listing of open orders for subcontract services.			
subcdetail.rpt	**Subcontract WIP**	William R. Elder, CPIM	64,512	11/05/20 10:29 am
	This report shows the value of the subcontract WIP (from the Work GL file). The report represents subcontract WIP posted to your integrated accounting system.			
subcpr.rpt	**Sub-C Summary Report**	William R. Elder, CPIM	33,280	08/21/20 8:44 am
	This report lists sub contract purchase requisitions and indicates if all material is available. Use it to help determine which requisitions may be sent to the subcontractor.			
subrecjournal.rpt	**Subcontract Receipts Journal**	William R. Elder, CPIM	35,840	08/21/20 8:50 am
	This report shows the value of the subcontract receipts (from the Work GL file). The report represents subcontract receipts posted to your integrated accounting system.			
subvarjournal.rpt	**Subcontract Material Variance Journal**	William R. Elder, CPIM	33,280	08/21/20 8:46 am
	This report shows the value of the subcontract receipts (from the Work GL file). The report represents subcontract receipts posted to your integrated accounting system.			
subwipjournal.rpt	**Subcontract Post Order Closure Journal Entry**	William R. Elder, CPIM	33,792	08/21/20 8:49 am
	This report shows the value of the subcontract WIP (from the Work GL file). The report represents subcontract WIP posted to your integrated accounting system.			
Subcontract Processing	Number of Files:		8	

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
04 - Production	**Number of Files:** 59			

05 - Materials

Inventory

adjtnx.rpt	**Adjustment Transactions**	William R. Elder, CPIM	32,768	08/22/20 6:36 am
	This report lists all adjustment transactions for a user defined date range. It can be used to monitor the dollar value of inventory adjustments.			
built-balance.rpt	**Built-Balance Report**	William R. Elder, CPIM	40,960	08/22/20 6:32 am
	This report lists manufactured items in inventory and the shop order receipts that generated them.			
invnobom.rpt	**Inventory w/ No BOM**	William R. Elder, CPIM	32,256	08/22/20 6:45 am
	This report displays all parts found in the part stock file that are not used as components in the product structure file. It can be used to help identify surplus items.			
invtnx.rpt	**Inventory Transactions**	William R. Elder, CPIM	33,280	08/22/20 6:34 am
	This report lists inventory transactions for a user defined date range. It sorts the report by the reference field and transaction code.			
lottransaction.rpt	**Lot Transactions**	William R. Elder, CPIM	33,280	08/22/20 7:28 am
	This report lists inventory transactions for a user defined part and lot number. It sorts the report by the transaction date and time.			
priloc.rpt	**Primary Location Report**	William R. Elder, CPIM	29,696	08/22/20 7:19 am
	This report compares the actual storage location to the primary location and prints all exceptions. This is a useful maintenance tool when running multiple locations in MAX that are set up as stockrooms. Having parts in the correct primary location facilitates the Issue Order and or Repetitive transaction.			
qchold.rpt	**QC Hold Transaction Report**	William R. Elder, CPIM	44,032	08/22/20 7:38 am
	This report shows all the contents of QC stockrooms and the transactions into and out of those stockrooms. It also calculates the length of time since the receipt. Note: This report uses the lot tracking module.			
sfctnx.rpt	**Inventory Transactions**	William R. Elder, CPIM	33,280	08/22/20 6:35 am
	This report lists shop floor transactions (i.e., post operation completions) for a user defined date range. It sorts the report by the reference field and transaction code.			
ssvalue.rpt	**Parts With Safety Stock >0 by Extended Cost**	William R. Elder, CPIM	29,184	08/22/20 7:23 am
	This report shows all parts with safety stock, the total inventory value and the portion of the total due to safety stock. The total safety stock dollars may be used to assure that safety stock policies are not set unrealistically high.			
stklist.rpt	**Stockroom Listing**	William R. Elder, CPIM	28,160	08/22/20 7:18 am
	This report prints out the contents of the stockroom master file. It is sorted by stockroom identifier and shows the number of the parts found within it.			
stockcountreport.rpt	**Stock Count Report**	William R. Elder, CPIM	77,312	08/22/20 6:46 am
	This report shows all stock in a format for counting. Designed to be used for receiving and transferring incoming goods			
stockstatuswithlots.rpt	**Stock Status with Lot Information**	William R. Elder, CPIM	31,744	08/22/20 7:17 am
	This report takes the current inventory and shows detailed lot information.			
tnxbyovr.rpt	**Transactions By Override Codes**	William R. Elder, CPIM	33,792	08/22/20 7:24 am
	This report lists inventory transactions for a user defined date range and specific general ledger override code.			
usage.rpt	**Inventory Value for Active Parts**	William R. Elder, CPIM	34,304	08/22/20 7:22 am
	This report calculates the usage for the past twelve months and then shows the current value of those parts on hand. It can be used to identify improper procurement or production decisions.			
usagebymonth.rpt	**Usage by Month**	William R. Elder, CPIM	36,352	08/22/20 7:22 am
	This report shows all parts in stock and calculates the usage for the past twelve months. It then provides days of supply information and the last used date. It can be used to identify improper procurement or production decisions.			
Inventory	Number of Files: 15			

Inventory - ABC Analysis

abc.rpt	**ABC Analysis**	William R. Elder, CPIM	31,232	08/22/20 6:24 am
	This report will list your parts in descending usage value, where usage is based upon the requirements detail file.			
abchist.rpt	**ABC Report - Historical**	William R. Elder, CPIM	33,792	09/09/20 8:03 am
	This report will list your parts in descending usage value, where usage is based upon the transaction history file.			
abcstrat.rpt	**ABC Part Strategy**	William R. Elder, CPIM	29,184	08/22/20 6:24 am
	Review your current item master strategy by class code.			
invabc.rpt	**Inventory By ABC Code**	William R. Elder, CPIM	34,816	08/22/20 6:54 am
	Evaluate your stockroom inventory by ABC classification. Rows represent Part ID's and columns ABC codes.			
invabcs2.rpt	**Inventory By ABC Class - Summary**	William R. Elder, CPIM	42,496	08/22/20 6:54 am
	Evaluate your stockroom inventory by ABC classification. Rows and columns represent ABC codes. A summary report. Supports 32 bit drill down!			

1/5/2021   9:22:59AM

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
invabcsm.rpt	**Inventory by ABC Code - Summary**	William R. Elder, CPIM	32,768	08/22/20 6:58 am
invabcsm1.rpt	**Inventory by ABC Class - Summary**	William R. Elder, CPIM	33,280	08/22/20 6:58 am
invabcsm2.rpt	**Inventory by ABC Class - Summary**	William R. Elder, CPIM	34,816	08/22/20 6:53 am
	Evaluate your stockroom inventory by ABC classification. Rows represent account type codes and columns ABC codes. A summary report.			
invabcsm3.rpt	**Inventory by ABC Class - Summary**	William R. Elder, CPIM	90,624	08/22/20 6:56 am
	Evaluate your stockroom inventory by ABC classification. Rows represent {Stock_Master.UDFREF_05} and columns ABC codes.			
Inventory - ABC Analysis	Number of Files: 9			

Inventory - Cycle Counting

cycabc.rpt	**Inventory Cycle Count Accuracy By ABC Class**	William R. Elder, CPIM	32,256	08/22/20 6:47 am
	Evaluate your stockroom inventory by ABC classification. A detailed report.			
cyccnan.rpt	**Cycle Count Results**	William R. Elder, CPIM	34,304	08/22/20 7:00 am
	This report lists all cycle count activity for parts in a user definable date range. It then displays the count data and accuracy.			
cyccount.rpt	**Cycle Count Worksheet**	William R. Elder, CPIM	41,984	08/22/20 7:01 am
	This report lists all parts in the system with counts older than 120 days or parts with count dates less than 120 days that have had four or more receipts. (> 120 days or < 120 days and Receipts > 4)			
cyccount1.rpt	**Cycle Count Report**	William R. Elder, CPIM	31,232	08/22/20 7:03 am
	This report lists all parts in the system with issue transactions and counts older than 120 days.			
cycle_count_new.rpt	**Cycle Count Report**	William R. Elder, CPIM	66,048	08/22/20 7:05 am
	Another version of a cycle count worksheet to help determine what parts to count.			
cycle_count_new_with_lots.rpt	**Cycle Count Report with Lots**	William R. Elder, CPIM	68,096	08/22/20 7:04 am
	This report lists all parts in the system with issue transactions and counts older than 120 days.			
cycle_count_zeropartstock.rpt	**Zero Stock**	William R. Elder, CPIM	29,696	08/22/20 7:03 am
	This reports shows all zero quantity part stock records. The easiest parts to count are those that have empty bins!			
cyclecount.rpt	**Cycle Count Report**	William R. Elder, CPIM	32,256	08/22/20 7:06 am
	This report lists all parts in the system with counts older than 120 days or parts with count dates less than 120 days that have had four or more receipts.			
cycparts.rpt	**Cycle Count Parts with Zero Tolerances**	William R. Elder, CPIM	28,672	08/22/20 7:04 am
	This report lists all parts in the system with zero cycle count tolerances. It can be used to assure new parts have been entered correctly.			
top200.rpt	**Top 200 Report**	William R. Elder, CPIM	31,744	08/22/20 7:08 am
	This reports finds the highest 200 parts in nettable stockrooms in terms of dollar value, which have not been counted in the past 90 days. It can be used to make certain that the highest inventory dollars are counted first.			
top300.rpt	**Top 300 Report**	William R. Elder, CPIM	40,960	08/22/20 7:08 am
	This reports finds the highest 300 parts in nettable stockrooms in terms of dollar value, which have not been counted in the past 90 days. It can be used to make certain that the highest inventory dollars are counted first.			
wkccacc.rpt	**Weekly Cycle Count Inventory Report**	William R. Elder, CPIM	37,376	08/22/20 6:14 am
	This report lists all cycle count activity for parts in a user definable date range. It then displays the current and historical accuracy rates for the parts counted, as well as, accounting measurements like change in inventory dollars due to current activity. It is an integral part of a cycle counting program.			
wkccacc1.rpt	**Weekly Cycle Count Inventory Report**	William R. Elder, CPIM	46,080	08/22/20 6:14 am
	This report lists is the same as the Weekly Cycle Count Inventory report, except it contains a sub-report showing lot numbers counted.			
Inventory - Cycle Counting	Number of Files: 13			

Inventory - Future Values

invvaluefc.rpt	**Inventory Forecast**	William R. Elder, CPIM	62,976	08/22/20 7:09 am
	This report takes the current inventory and then calculates future inventory based upon open orders.			
invvaluefc2.rpt	**Inventory Forecast**	William R. Elder, CPIM	67,072	08/22/20 7:09 am
	This report takes the current inventory and then calculates future inventory based upon open orders.			
Inventory - Future Values	Number of Files: 2			

Inventory - Kitting

parts_pick_list_1lev.rpt	**Single-level Pick List**	William R. Elder, CPIM	41,984	08/22/20 7:37 am
	This report displays a single level BOM for a part and for each component, how many are in stock and the quantity. It can be used as a simple pick list or a way to check for shortages. Spare Parts Picking from Non-nettable locations			
picklabels.rpt	**Pick Labels**	William R. Elder, CPIM	31,744	08/22/20 7:37 am

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FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	This report prints labels to aid identifying parts that have been kitted. Prints on standard address labels			
picklabelswithlots.rpt	**Pick Labels with Lot Numbers**	William R. Elder, CPIM	69,120	08/22/20 7:37 am
	This report prints labels to aid identifying parts that have been kitted. It is the same as the label above, except shows lot numbers. Prior to perfoming issue transaction. 3 up.			
picklabelswithlots1.rpt	**Pick Label with Lots**	William R. Elder, CPIM	68,608	08/22/20 7:37 am
	This report is another version that prints labels to aid identifying parts that have been kitted. It is the same as the label above, except shows lot numbers. Transaction based. Orders must be issued prior to printing. 2 up.			
Inventory - Kitting	Number of Files: 4			

Inventory - Obsolete & Surplus

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
excess.rpt	**Obsolete Material - No Requirements**	William R. Elder, CPIM	51,712	08/22/20 7:07 am
	This report calculates excess inventory based upon the date the part was added and a user defined period (i.e., last year). Requirements and/or sales orders are shown for the parts (if any).			
inventoryanalysis.rpt	**Inventory Analysis**	William R. Elder, CPIM	43,520	08/22/20 6:27 am
	This report shows all parts in stock and calculates the usage for the past twelve months. It then provides days of supply information and the last used date. It can be used to identify improper procurement or production decisions. Days of Supply Based Upon Actual Transaction (I&S) Usage			
lastused.rpt	**Last Used Report**	William R. Elder, CPIM	33,792	08/22/20 6:28 am
	This report finds the date the part was used last (in an issue or a shipment) and then provides an aging in days.			
nois.rpt	**Inventory Value of Parts Not Issued or Shipped**	William R. Elder, CPIM	32,256	08/22/20 6:31 am
	Another version of the obsolete inventory report.			
obsolet1.rpt	**Obsolete Inventory**	William R. Elder, CPIM	32,768	08/22/20 6:30 am
	Another version of the obsolete inventory report. It calculates years of supply (YOS).			
obsolete.rpt	**Obsolete Inventory**	William R. Elder, CPIM	33,792	09/24/20 3:16 pm
	This report calculates past usage (issues and shipments only) and then compares that usage to your current inventory levels. Excess quantities and values are costed and summarized.			
partsused.rpt	**Parts Used Report**	William R. Elder, CPIM	33,280	08/22/20 6:29 am
	This report finds the date that parts in inventory were last used (in an issue or a shipment). Issues and Shipments only			
surplus.rpt	**Surplus Inventory Report**	William R. Elder, CPIM	32,768	08/22/20 6:26 am
	This report calculates future usage from the requirements detail file and then compares that usage to your current inventory levels. Excess quantities and values are costed and summarized.			
Inventory - Obsolete & Surplus	Number of Files: 8			

Inventory - Receiving

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
incomingmaterial.rpt	**Incoming Material Report**	William R. Elder, CPIM	34,304	08/22/20 7:35 am
	This report shows all potential receipts from open purchase orders. It calculates the stock date based upon stock time using only business days. Uses Business Days Logic for Stock Time			
niporec.rpt	**NI Receipts**	William R. Elder, CPIM	32,256	08/22/20 7:35 am
	Non-inventoried Receipts This report shows all non-inventoried receipts for a user defined date range. Based upon Transaction History File			
porecvpage1_ext.rpt	**Receiving Transaction Log**	William R. Elder, CPIM	74,752	08/22/20 7:35 am
	This report shows prints a PO receiver for the days receipts. Can be run outside of MAX. No Report Extract table			
receiptswithshortges.rpt	**Receipts with Shortages**	William R. Elder, CPIM	78,848	08/22/20 7:35 am
	This report shows all PO receipts made to MAX that have open shop order requirements. This can be used to direct material to the shop floor instead of a stockroom location.			
recvlog.rpt	**Daily Receiving Log**	William R. Elder, CPIM	71,168	08/22/20 7:35 am
	This report shows prints a PO receiver. Submitted by Brian Palmer of Norwich Aero			
Inventory - Receiving	Number of Files: 5			

Inventory - ROP

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
invmrk.rpt	**Marketing Inventory**	William R. Elder, CPIM	31,232	08/22/20 7:12 am
	This report was written to pull inventory data for specific account type codes. If the part has a specific code and on-hand inventory, then it will appear on this report. The report is used to review current inventory status, as well as, static data on the part (i.e., commodity code, min and max quantities, etc.).			
mktrop.rpt	**Marketing ROP**	William R. Elder, CPIM	31,232	08/22/20 7:11 am

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	This report is similar to the Marketing Inventory Report in format. It only shows those parts that have tripped a "manual" reorder point. Often these parts are MRP Planned, yet we want to perform a periodic review with them. This report indicates which parts have tripped a minimum balance.			
psrop.rpt	**ROP Report**	William R. Elder, CPIM	66,048	08/22/20 7:21 am
	Uses the ROP from the Part Stock table and not the Part Master table.			
rop1.rpt	**Reorder Point Report**	William R. Elder, CPIM	37,376	08/22/20 7:21 am
	This report is a duplicate of the MAX ROP report. The fields are identical. It shows the balance due on open orders.			
rop2.rpt	**ROP using open PO's**	William R. Elder, CPIM	32,768	08/22/20 7:21 am
	This report is another version of analyzing ROP trips. The fields are slightly different than the above version.			
ropusage.rpt	**ROP Usage**	William R. Elder, CPIM	32,256	08/22/20 6:31 am
	This report finds all shipment and issue transactions in the transaction history file for part types "D", and "Y" (ROP parts). It can be used to evaluate reorder points and quantities.			
Inventory - ROP	Number of Files:	6		

Inventory - Shipping

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
dayshp.rpt	**Daily Shipping Log**	William R. Elder, CPIM	32,256	08/22/20 7:39 am
	This report summarizes all shipments from the transaction history file. It can be used for validation of packing lists early on the implementation.			
shiplog.rpt	**Shipping Log**	William R. Elder, CPIM	36,352	08/22/20 7:39 am
	This report shows all shipments for a user definable date range. It was written for a user that needed a quick and dirty summary of outgoing product without costing fields.			
Inventory - Shipping	Number of Files:	2		

Inventory - Shortages

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
shorts.rpt	**Work Order Shortages By Work Order**	William R. Elder, CPIM	35,328	08/22/20 6:42 am
	This report displays all purchase order receipts for a user-definable period and then displays the quantity received, quantity on hand, and all open requirements for the parts (i.e., work orders). This facilitates the issuing of work orders that are considered "short" and waiting for parts.			
Inventory - Shortages	Number of Files:	1		

Inventory - Valuation

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
finisgds.rpt	**Finished Goods Inventory**	William R. Elder, CPIM	30,720	08/22/20 7:29 am
	This report extracts all inventory records for parts within a user defined stockroom (any stockroom). It shows the quantity on-hand, unit cost and extended dollars. It sorts by stockroom, commodity code and part identifier.			
highinv.rpt	**High Inventory Values**	William R. Elder, CPIM	31,744	08/22/20 7:29 am
	This report summarizes all inventory in the Part/Stock file by part number and then sorts the results in descending extended dollar value. It is helpful for determining what is contributing the most to your inventory.			
invact.rpt	**Inventory By Account Type Code**	William R. Elder, CPIM	31,744	08/22/20 7:31 am
	This report shows the detail of all parts in inventory. It displays the value of each part in an engineering, active, or obsolete column depending on the engineering status code. It is typically used as an inventory reporting tool where accounting is driven by multiple account type codes.			
invactsm.rpt	**Inventory By Account Type Code - Summary**	William R. Elder, CPIM	32,256	08/22/20 7:31 am
	This report is the summary version of the Inventory by Account Type detailed report. It displays the value of each part in an engineering, active, or obsolete column depending on the engineering status code. It is typically used as an inventory reporting tool where accounting is driven by multiple account type codes.			
invbycc.rpt	**Inventory By Commodity Code**	William R. Elder, CPIM	31,744	08/22/20 7:31 am
	This report shows all part stock records that are greater than zero for a specific commodity code. Columns show the value of the status of the part (i.e., whether it is active, obsolete, or other based upon the engineering status code from the part master file).			
invbycc1.rpt	**Inventory By Commodity Code**	William R. Elder, CPIM	31,232	08/22/20 7:31 am
	This report shows all part stock records that are greater than zero for a specific commodity code. Columns show cost elements (material, labor, and overhead).			
invbyccs.rpt	**Inventory By Commodity Code - Summary**	William R. Elder, CPIM	32,256	08/22/20 7:31 am
	A summary version of the Inventory by Commodity Code report. This report shows all part stock records that are greater than zero for a specific commodity code. Columns show the value of the status of the part (i.e., whether it is active, obsolete, or other based upon the engineering status code from the part master file).			
invbyllc.rpt	**Inventory By Low Level Code**	William R. Elder, CPIM	31,232	08/22/20 7:31 am
	This report summarizes the total number of parts for each low level code used and the value of the parts at that level. It is useful for help in determining at what level of the bill of material you are stocking.			
invcogs.rpt	**Inventory - Total Cost Report**	William R. Elder, CPIM	31,744	08/22/20 7:31 am
	This report shows the detail of all parts in inventory. It displays the material, labor and overhead value of each part by account type. It can be used as a customized version of the Costing – Stock Cost Report.			

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
purchinv.rpt	**Purchased Inventory Report**	William R. Elder, CPIM	52,224	08/22/20 7:32 am

This report is similar to the Inventory – Total Cost report, but only shows purchased material on hand. The report displays the material, labor and overhead value of each part by account type. The report also shows the PO's placed in the last 180 days and calculates the average price paid. The last PO date and quantity received is also shown.

| Inventory - Valuation | Number of Files: | | 10 | |

MRP

assykanban1.rpt	**Assembly Kanban Card**	William R. Elder, CPIM	80,896	08/21/20 9:24 am

This report was designed to print kanban cards to authorize production without creating shop orders. Report prints a card for each planned order.
Works best when practicing vertical order release.

| excpctr.rpt | **Exception Counter** | William R. Elder, CPIM | 31,232 | 08/21/20 9:25 am |

This report analyzes the MRP Explosion file and counts the number of exceptions for both manufactured and purchased parts. Early in MRP implementations, we use this to measure the progress of planners. As they improve their MRP skills, the number of exception messages decline.

| excpctr2.rpt | **Exception Counter - ABC** | William R. Elder, CPIM | 33,792 | 08/21/20 9:25 am |

This report analyzes the MRP Explosion file and counts the number of exceptions for both manufactured and purchased parts. It is similar to the Exception Counter report, except it has columns for the ABC Class codes.

| fgssplanning.rpt | **Finished Goods w/ SS Planning** | William R. Elder, CPIM | 58,880 | 08/21/20 9:25 am |

This report shows all parent parts with safety stock quantities. It reports when open customer orders exceed safety stock. It also shows the demand and supply of the part to assure parts are scheduled properly.

| mfaction.rpt | **MF Action Report** | William R. Elder, CPIM | 34,816 | 08/21/20 9:24 am |

This report lists all MRP exception messages for manufactured items from the most recent MRP explosion. Your material planners, or shop scheduler should review this report after each MRP run. The report is sorted by exception type.

| mrpstat.rpt | **MRP Status Report** | William R. Elder, CPIM | 32,768 | 08/21/20 9:30 am |

This report verifies the number of parts processed during the last MRP run. It is useful in determining if MRp has finished or not.

| noreq.rpt | **On Hand with No Requirements** | William R. Elder, CPIM | 37,888 | 08/21/20 9:26 am |

This report shows all parts with on hand balances and no open requirements.

| poact2.rpt | **PO Action Report w/Filters** | William R. Elder, CPIM | 34,816 | 08/21/20 9:28 am |

This report lists all MRP exception messages for purchased items from the most recent MRP explosion. Your material planners should review this report after each MRP run. The report is sorted by exception type within vendor. This version includes filters for move in and move out exceptions.

| poact3.rpt | **PO Action Report w/ Filters - Move In Only** | William R. Elder, CPIM | 36,864 | 08/21/20 9:28 am |

This report lists all MRP exception messages for purchased items from the most recent MRP explosion. Your material planners should review this report after each MRP run. The report only includes move in exception types and prompts for an ending date range. Use this report as a quick list of hot orders to communicate to vendors.

| poact4.rpt | **PO Action Report w/ Filters - "C" Items** | William R. Elder, CPIM | 34,816 | 08/21/20 9:28 am |

This report lists all MRP exception messages for purchased items from the most recent MRP explosion. Your material planners should review this report after each MRP run. The report only includes exceptions for ABC Class "C" (low value) items only.

| poaction.rpt | **PO Action Report** | William R. Elder, CPIM | 34,304 | 08/21/20 9:28 am |

This report lists all MRP exception messages for purchased items from the most recent MRP explosion. Your material planners should review this report after each MRP run. The report is sorted by exception type within vendor. There are no filters on this version.

| vnaction.rpt | **Open PO By Vendor / Due Date** | William R. Elder, CPIM | 45,568 | 08/21/20 9:29 am |

This report shows all open orders and their corresponding exception messages from the latest MRP explosion. The form is deigned where it can be faxed to the vendor for action.

| vnactn2.rpt | **Open PO By Vendor / Due Date - 1 Vendor** | William R. Elder, CPIM | 46,080 | 08/21/20 9:29 am |

This report is the same as the vendor action report above, except it prompts the user for one vendor.

| wodispatch.rpt | **Work Order Dispatch Report** | William R. Elder, CPIM | 79,872 | 08/21/20 9:24 am |

This report was designed to help planners when using "Vertical" order release (i.e., release all work orders for a specific customer order). The report relies on passing a reference through the MRP process to all planned orders.
Supports Vertical Order Release

| MRP | Number of Files: | | 14 | |

Physical Inventory

openseq.rpt	**Open Sequence Listing**	William R. Elder, CPIM	31,232	08/21/20 9:14 am

This report is a very basic Work Center Detail report. It shows the open sequences that tags will be created for. Use this report to estimate how many WIP tags will be created.
Can be used to determine how many inventory tags are needed.

| piadjval.rpt | **Physical Inventory Adjustment** | William R. Elder, CPIM | 32,768 | 08/21/20 9:15 am |

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	This report examines the "Adjustment" records in the Transaction history file as a result of updating the tag files. It shows all parts that have had adjustments in descending value. The total number is what will be posted through to your integrated accounting system.			
pidiff.rpt	**Physical Inventory Difference**	William R. Elder, CPIM	33,792	08/21/20 9:15 am
	This report examines yours tag counts and the counts prior to the physical inventory and reports the differences in quantities and in dollars and cents. You may use it to analyze where the most significant errors have occurred. Use this report prior to purging tag files.			
precounttagreport.rpt	**Physical Inventory Pre Count Tag Report**	William R. Elder, CPIM	43,520	08/21/20 9:14 am
	This report prints a tag that can be used to perform precounts (i.e., counts prior to the actual physical inventory).			
printag2.rpt	**Print Tags - 2 up**	William R. Elder, CPIM	146,432	08/21/20 9:18 am
	This version of the MAX physical inventory tag prints two tags per page and shows the second description and account type code for the parts.			
stklbl.rpt	**Stock Label**	William R. Elder, CPIM	28,160	08/21/20 9:13 am
	This report lists bin labels for on a one-up continuous feed label. The part identifier is in code 39 format.			
stkrmlbl.rpt	**Stockroom Label**	William R. Elder, CPIM	28,672	08/21/20 9:13 am
	This report prints stockrooms labels on a four-up 5×7 card. The stock identifier is in code 39 bar-code format.			
tagaccy.rpt	**Tag Accuracy Report**	William R. Elder, CPIM	34,304	08/21/20 9:15 am
	This report analyzes your before and after counts and calculates the "materials" version of accuracy. This method looks at absolute hits and misses, therefore positive and negative values do not cancel. Find out how accurate your inventory really is! Use this report prior to purging tag files.			
tagadit1.rpt	**Tag Audit Summary Report**	William R. Elder, CPIM	30,720	08/21/20 9:16 am
	This report simply lists all tags by tag type (i.e., stockroom, WIP, voided, blank, etc.) and tag number. It shows the ticket information, including the count/recount quantity and cost information. Use this report prior to purging tag files.			
tagadit2.rpt	**Tag Audit Summary Report #2**	William R. Elder, CPIM	33,792	08/21/20 9:16 am
	Another version of a tag audit report. Use this report prior to purging tag files.			
tagauditform.rpt	**Physical Inventory Tag Audit Form**	William R. Elder, CPIM	70,144	08/21/20 9:17 am
	This report prints tags in a worksheet format for those organizations that do not wish to use actual tags. The tag number is bar coded for easy entry into the tag maintenance screen.			
tagctrl.rpt	**Tag Control Report**	William R. Elder, CPIM	30,208	08/21/20 9:16 am
	This report simply lists all tags by tag number. It can be used as a worksheet to distribute the tags to the tag teams and account for outstanding tags.			
tagvalue.rpt	**Physical Inventory Tag Value Report**	William R. Elder, CPIM	31,744	08/21/20 9:16 am
	This report lists all tags by part number and tag number. It is sorted by descending tag value (extended cost). Use this report prior to purging tag files.			
wocycnt.rpt	**Work Order Cycle Count Report**	William R. Elder, CPIM	38,912	08/21/20 9:17 am
	This report is similar to the Work Center Detail report except it is sorted by the team leader (as indicated in the UDF Key field of the Work Center Master file). It was designed to verify open work orders are correct in regards to quantity and sequence. Use it to reconcile your open work orders prior to creating the physical inventory tags. This report may be used anytime, even outside of the physical inventory process.			

Physical Inventory	Number of Files:	14		

Purchasing

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
alven.rpt	**Alpha Vendor Listing**	William R. Elder, CPIM	29,184	08/21/20 2:06 pm
	This report lists all vendors in alphabetical order by vendor name.			
buycard.rpt	**Buycard Report**	William R. Elder, CPIM	125,440	08/21/20 2:10 pm
	This report lists purchasing information for a specific parts including: Part master, Part Notes, Manufacturer's Part Control, Part Vendor, Open Orders, and the last 5 transactions. It was designed to help purchasing determine where to purchase the part from.			
buycard2.rpt	**PR - Buycard Report**	William R. Elder, CPIM	126,464	08/21/20 2:10 pm
	This report is similar to the buycard report (above), but only prints for open purchase requisitions. It was designed to provide buyers with up-to-date information for requisitions.			
buycard3.rpt	**Buycard Report**	William R. Elder, CPIM	127,488	08/21/20 2:10 pm
	This report is similar to the buycard report (above), but instead of showing the last 5 receipts and PO's it prompts for a date range. It was designed to provide buyers with up-to-date information for requisitions. Prompts for date range for history reports			
costsavreq.rpt	**Cost Savings Report - Requirements**	William R. Elder, CPIM	41,984	08/21/20 2:20 pm
	This report reads parts from a local Microsoft Access table which hold the amount of savings achieved for each part. It then pulls future requirements for that part from the requirements detail file. It shows the projected savings by month and graphs the data. Note: You must install and maintain the Microsoft Access database and maintain parts with savings for this report to operate properly. The database is included in the report file.			
costsavtnx.rpt	**Cost Savings Report - Transactions**	William R. Elder, CPIM	42,496	08/21/20 2:20 pm

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	This report reads parts from a local Microsoft Access table which hold the amount of savings achieved for each part. It then pulls transactions for that part from the transaction history file based upon the effective date of the savings. It shows the detailed savings by month and graphs the data. Note: You must install and maintain the Microsoft Access database and maintain parts with savings for this report to operate properly. The database is included in the report file.			
eau.rpt	**Estimated Annual Usage Inquiry** This report was designed to run as a query from the MAX Exact Toolbar. It sums the future requirements for the part for 365 days from the system date. It can be used to find a quick count of annual usage, going forward, based upon your current MRP run.	William R. Elder, CPIM	29,184	08/21/20 2:21 pm
eaubypn.rpt	**Estimated Annual Usage by P/N** This report begins with all active parts found on open purchase orders. In other words, if the part has been ordered, it appears on this report. Sub-reports then pull the future requirements for a user defined date range and manufacturer's part control information. The report was defined to work as a request for quote.	William R. Elder, CPIM	53,760	08/21/20 2:11 pm
eaubyvn2.rpt	**Estimated Annual Usage by Vendor** This report finds all status 2 (approved) purchase requisitions in the order master file, and for each vendor assigned to the part in the part vendor file, prints out a request for quote. A sub-report also adds the manufacturer's part number.	William R. Elder, CPIM	55,296	08/21/20 2:12 pm
firstneg.rpt	**First Negative Report** This report shows the date a part first goes negative according to the MRP detail. It can be used as an expedite report. Used to expedite.	William R. Elder, CPIM	40,448	08/21/20 2:22 pm
firstneg2.rpt	**First Negative Report** This report shows the date a part first goes negative according to the MRP detail. It differs from the report above as it shows supply orders for the next fourteen days. Used to expedite.	William R. Elder, CPIM	31,232	08/21/20 2:22 pm
isopenpo.rpt	**Is Open PO?** This report prompts you for a cutoff date and then shows you all the purchase orders that were open as of that date based upon the receipt date.	William R. Elder, CPIM	84,992	08/21/20 2:14 pm
lastpo.rpt	**Last PO Receipt** This report shows the last purchase order receipt record in the system for a user-definable date range. It can be used to monitor the order costs on purchased items.	William R. Elder, CPIM	34,816	08/21/20 2:29 pm
ltcalc.rpt	**Lead Time Calculator** This report analyzes the date received versus the create date of the purchase orders calculates the difference in days. It is very useful for evaluating lead times. Compares Demonstrated Lead Time to Part Master Lead Time	William R. Elder, CPIM	34,304	08/21/20 2:27 pm
ltdist.rpt	**Leadtime Distribution Report** This report pulls all purchased parts from the database and analyzes the lead-time. It groups the parts by lead time ranges (e.g., < 25 days, 26 -45 days, etc.). It can be used to determine the percentage of parts that fall within a range. This is helpful when monitoring the reduction of lead-time.	William R. Elder, CPIM	30,720	08/21/20 2:08 pm
nipobyvn.rpt	**Open NIPO By Vendor** This report lists all open non-inventoried purchase orders by vendor.	William R. Elder, CPIM	43,008	08/21/20 2:32 pm
non-canadianparts.rpt	**Non-Canadian Purchased Parts** This report is shows purchased parts obtained from outside of the country, in this case, Canada.	William R. Elder, CPIM	31,744	08/21/20 2:11 pm
openpr.rpt	**Open PR's** This report lists all released purchase requisitions in the system. The report is sorted by extended cost and shows the order number, quantity and due date. It is useful for getting a "ballpark" approval on funds or just manage open orders.	William R. Elder, CPIM	33,280	08/21/20 2:12 pm
po$byvendor.rpt	**PO's By Month w/ Graph** This report shows the dollar value of open purchase orders and graphs them by month using a Crystal Bar Graph.	William R. Elder, CPIM	32,256	08/21/20 2:31 pm
po recsm.rpt	**PO Receipt Summary** Ths report shows incoming cash flow requirements for purchase orders.	William R. Elder, CPIM	30,208	08/21/20 2:39 pm
poanalysis.rpt	**PO Count Summary** This report counts the number of PO's issued in a user difined date range	William R. Elder, CPIM	32,768	08/21/20 2:38 pm
poauthorization.rpt	**PO Authorization By Value** This report shows open purchase orders by dollars and then indicates the level of authorization required. This report uses a "SQL Command" to summarize open PO's. SQL Command Pre-processes Order Value to be compared against Authorisation levels	William R. Elder, CPIM	34,816	08/21/20 2:16 pm
pobydateandgl.rpt	**PO by Date and GL Ref** This report analyzes the PO activity by date and general ledger account number.	William R. Elder, CPIM	44,032	08/21/20 2:24 pm
pobyvn.rpt	**Open PO By Venor / Due Date** Print all open inventoried purchase orders by vendor and due date sequence. Supplying a date (i.e., today) makes it a past due/expediting report!	William R. Elder, CPIM	42,496	08/21/20 2:14 pm
pobyvn1.rpt	**Open PO By Vendor** Print all open inventoried purchase orders by vendor and due date sequence. This version is sorted by supplier and designed so that it can be faxed for confirmation.	William R. Elder, CPIM	44,032	08/21/20 2:13 pm

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FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
pocost.rpt	**PO Cost Report**	William R. Elder, CPIM	72,192	08/21/20 2:15 pm
	This report shows receipts of purchase orders. It can be run by date buyer or general ledger reference. Checkout the very complicated record selection formula.			
pohist.rpt	**Purchase Order History**	William R. Elder, CPIM	34,816	08/21/20 2:18 pm
	This report lists all purchase orders placed with due dates less than a user definable date. It shows all orders in this range regardless of status. It can be used to help determine where material has been purchased historically and the prices paid.			
porecost.rpt	**PO Receipt Costs**	William R. Elder, CPIM	38,400	08/21/20 2:18 pm
	This report shows all receipts for a user-definable period of time. It compares the standard cost with the PO cost for each receipt and calculates variance. For companies that are not running integrated accounting systems, this report can be used to judge the accuracy of the costs (standard and purchase order). Run for a long period of time it can be used to show purchasing price trends.			
posbymonth.rpt	**PO's By Month w/ Graph**	William R. Elder, CPIM	39,936	08/21/20 2:15 pm
	This report shows the dollar value of open purchase orders and graphs them by month using a Crystal Bar Graph.			
prtven.rpt	**Part / Vendor Report**	William R. Elder, CPIM	31,232	08/21/20 2:08 pm
	This report lists all relationships from the part/vendor file by part number. It is useful to track where material has been procured and how many different sources have been used for each part.			
purchaseexceptions.rpt	**Purchasing Exceptions**	William R. Elder, CPIM	69,632	08/21/20 2:15 pm
	This report shows receipts of purchase orders where the on hand quantities (net and non-net) is still zero. The report was written to find where 100% consumption is occurring on purchase material. Based upon receipts and no on hand inventory			
purchasescheduleexport.rpt	**Purchase Schedule for Excel**	William R. Elder, CPIM	38,912	08/21/20 2:16 pm
	This report shows formats the data from the purchasing schedule so that it can be exported to Excel. From: Carl Proescholdt, DCA Manufacturing.			
purprhist.rpt	**Purchased Part History**	William R. Elder, CPIM	41,472	08/21/20 2:33 pm
	This report lists all purchase orders for each purchased part and graphs the price history based upon the order date of the purchase order.			
rcpvsprm create cur.rpt	**Vendor Performance**	William R. Elder, CPIM	39,424	08/21/20 2:37 pm
	Uses Create Date and Current Due Date			
rcpvsprm cur.rpt	**Vendor Performance**	William R. Elder, CPIM	38,912	08/21/20 2:24 pm
	This report analyzes the date received versus the current due date and calculates the difference in days. It is very useful for evaluating supplier performance. Report updated to correctly calculate business days less holidays.			
rcpvsprm prm.rpt	**Vendor Performance**	William R. Elder, CPIM	39,424	08/21/20 2:24 pm
	This report analyzes the date received versus the promised date and calculates the difference in days. It is very useful for evaluating supplier performance. Report updated to correctly calculate business days less holidays.			
rfqrpt.rpt	**Request for Quote**	William R. Elder, CPIM	41,984	08/21/20 2:33 pm
	This report finds all status 2 (approved) purchase requisitions in the order master file, and for each vendor assigned to the part in the part vendor file, prints out a request for quote. A sub-report also adds the manufacturer's part number. Submitted by MTSI, Richardson, TX			
SearchNIPO.rpt	**Search NIPO Descriptions**	William R. Elder, CPIM	68,096	08/21/20 2:31 pm
	This report performs a key word search on NIPO descriptions from the MAX Note table.			
stdvsord.rpt	**Standard vs. Order Cost**	William R. Elder, CPIM	34,816	08/21/20 2:37 pm
	This report analyzes all purchase orders, regardless of status, in terms of the order cost and the current standard cost. It can be used by purchasing managers to anticipate purchase price variances before they occur. It can also be used to obtain an advanced warning when a standard cost may need updating.			
supphist.rpt	**Supplier History Report**	William R. Elder, CPIM	35,840	08/21/20 2:17 pm
	Lists all receipts for a user-defined period of time and vendor. Shows order number, part number (description of NI orders), transaction quantity, cost, requisitions, etc. for items received on PO's.			
supplier receipts.rpt	**Vendor Performance**	William R. Elder, CPIM	35,328	08/21/20 2:36 pm
	THis supplier receipt report shows quantity information only. Designed for use in the receiving or warehous functions.			
venapr.rpt	**Approved Supplier Report**	William R. Elder, CPIM	29,184	08/21/20 2:07 pm
	This report lists all suppliers that have an approved code (located in UDF Reference field of the vendor master master). The report is sorted by approved code and vendor identifier.			
vendor descendingpurchases.rpt	**Vendor Descending Purchases**	William R. Elder, CPIM	44,544	08/21/20 2:24 pm
	This report analyzes the vendor activity. It is like the Alpha Vendor report, but lists vendors in descending total PO value.			
ventot$.rpt	**Purchases By Vendor**	William R. Elder, CPIM	35,328	08/21/20 2:34 pm
	This report lists all purchase order receipts from Transaction History within a user-defined date range.			

Purchasing   Number of Files: 44

Repetitive Manufacturing

repanal.rpt	**Repetitive Part Analysis**	William R. Elder, CPIM	32,256	08/21/20 8:53 am

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	After entering a work order for the repetitive part, this report shows component part strategy. It was designed to assure the proper structure is in place prior to beginning backflush transactions.			
replaborrecovery.rpt	**Repetitive Cost Recovery**	William R. Elder, CPIM	35,328	08/21/20 8:54 am
	This report shows all receipts to stock as a result of the repetitive receipt transaction and extracts the standard amount of labor in the part master file. It can be used to verify the amount of labor recovered in a period.			
repparts.rpt	**Repetitive Parts**	William R. Elder, CPIM	29,696	08/21/20 8:53 am
	This report shows all part strategy information for all parts identified as repetitive (e.g., REP in user defined key field).			
reprecp1.rpt	**Costed Repetitive Part Receipts**	William R. Elder, CPIM	35,840	08/21/20 8:54 am
	This report shows all receipts to stock as a result of the repetitive receipt transaction. The report is similar to the repetitive receipts report above, except shows the standard cost value of the receipt.			
reprecpt.rpt	**Repetitive Part Receipts**	William R. Elder, CPIM	32,768	08/21/20 8:54 am
	This report shows all receipts to stock as a result of the repetitive receipt transaction. The report may be used to review daily production.			

Repetitive Manufacturing	Number of Files:	5		

05 - Materials	**Number of Files:**	**152**		

06 - Finance

Accounts Payable - Balance

glpurch.rpt	**GL Proof - All Purchasing**	William R. Elder, CPIM	36,864	08/21/20 8:13 am
	This report shows all activity residing in the MAX General Ledger Work file for purchase orders. It basically pulls all purchase order activity from the file so that it can be looked at in total. It was originally written to help isolate the Purchase Price Variance (PPV) problems associated with MAX in early version 9.0/3.2.Note: Watch the period dates. Use a large enough period to see the entire transaction for an order. There are sometimes weeks in between when an order is received and approved for payment (i.e., vouchered).			
glvsap.rpt	**G/L vs. A/P Reconciliation**	William R. Elder, CPIM	37,376	08/21/20 8:13 am
	Two of the accounts that require "balancing" at the end of a period are the purchase receipts and non-inventory receipts accounts. This report lists all activities for these accounts that reside in MAX. It can be used as a comparison with your trial balance report from your integrated general ledger module. This report does an excellent job of pinpointing timing problems between two systems.			

Accounts Payable - Balance	Number of Files:	2		

Accounts Payable - PPV

monthlywriteupdown.rpt	**Monthly Write Up/Down**	William R. Elder, CPIM	52,224	08/21/20 8:19 am
	This report pulls all variance transactions from the transaction history file and shows the impact on ppv for a period of time. This is another report to help explain purchase price variance. Based Upon the Transaction History File			
ppv.rpt	**Purchase Price Variance**	William R. Elder, CPIM	34,816	08/21/20 8:08 am
	This report reads all of the Purchase Price Variance information from the General Ledger work file and displays the important information about the variance (PO#, Voucher #, Vendor ID and Debit or Credit amount). It can be used as a detailed document for troubleshooting or explaining actual PPV's for the past period.			
ppv2.rpt	**Purchase Price Variance #2**	William R. Elder, CPIM	34,816	08/21/20 8:12 am
	Another version of the PPV (Accounting) report. Based Upon the PO Receipts file			
suprecls.rpt	**PPV - No Standard Cost - Supplies Reclass**	William R. Elder, CPIM	35,840	08/21/20 8:11 am
	This report pulls all general ledger entries from the Work General Ledger file where the standard cost is zero. These items are typically supplies that have been stocked, but not valued. This report can be used to produce a journal entry to reclass those items.			

Accounts Payable - PPV	Number of Files:	4		

Accounts Payable - Purchase Receipts

glrefpr.rpt	**G/L Reference - Purchase Receipts**	William R. Elder, CPIM	36,864	08/21/20 8:19 am
	This report shows all MAX activity for a general ledger account for a user specified date range. It was written to help explain differences between MAX and your integrated accounting system. Use this report to explain the differences in your unposted receipts report (MAX) and the posted transaction summary (accounting).			
poquery.rpt	**Purchase Receipts Query**	William R. Elder, CPIM	46,592	08/21/20 8:15 am
	This report shows all purchase order information including line and order notes, purchase receipt information, voucher information for a individual purchase order number. It was written to help A/P clerks troubleshoot vendor invoices.			
porecs.rpt	**Unposted Receipts**	William R. Elder, CPIM	35,840	08/21/20 8:14 am
	This report is the exact same report as the MAX Unposted Receipt Report except: 1) It shows inventoried, non-inventoried, and subcontracted receipts separate, and 2) It has grand totals at the bottom of the report.			
porecsm.rpt	**PO Receipts - Summary**	William R. Elder, CPIM	32,256	08/21/20 8:14 am

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	This report is similar to the cash flow reports. It summarized the receipts of purchase orders by month. The order cost is used.			
purchrec.rpt	**Purchase Receipts Proof**	William R. Elder, CPIM	36,352	08/21/20 8:10 am
	This report shows all MAX activity for a general ledger account for a user specified date range. It was written to help explain differences between MAX and your integrated accounting system. Use this report to explain the differences in your unposted receipts report (MAX) and the posted transaction summary (accounting). Report to list the net debits and credits from the MAX GL Work file.			

Accounts Payable - Purchase Rec	Number of Files:	5		

Accounts Payable - Vouchers

apbatch.rpt	**A/P Voucher Register**	William R. Elder, CPIM	33,280	08/21/20 8:07 am
	This report reads all voucher batches posted from MAX in a user defined period and summarizes all debit and credit information by batch number. It can be used to reconcile differences between MAX and your integrated accounting system.			
glunpvch.rpt	**Unposted A/P Vouchers**	William R. Elder, CPIM	35,840	08/21/20 8:20 am
	This report is a special version of the GLPROOF report for the unposted vouchers account. It searches for vouchers in the work general ledger file that have not been posted into your integrated accounting system.			
unpstvch.rpt	**Unposted Voucher Report**	William R. Elder, CPIM	38,400	08/21/20 8:06 am
	This report is used to make certain that there are no unposted vouchers at the end of the accounting period. If vouchers are marked and not posted, the balance between MAX and your integrated accounting system will be off. If all vouchers are posted, this report will return no records. If vouchers are found, either Un-mark them or post them through to accounting.			

Accounts Payable - Vouchers	Number of Files:	3		

Accounts Receivable

accounting statement GPS.rpt	**Monthly Statements from Dynamics**	William R. Elder, CPIM	93,696	08/21/20 4:49 pm
	This report reads prints a customer account statement from Microsoft Great Plains Dynamics. Thank you to Lynne Tyler @ Felton Brush for this report. From Lynne Tyler @ Felton, Inc.			
custhold.rpt	**Customers On Hold Report**	William R. Elder, CPIM	30,208	08/21/20 5:22 pm
	This report lists all customers who have been put on hold in the MAX Customer Master file.			
custstat.rpt	**Customer Statements**	William R. Elder, CPIM	28,672	08/21/20 5:25 pm
	This report lists all customers in the MAX Customer Master file where the statement flag is not set to "Y", Yes. It is used by accounting to verify all customers are receiving statements. This report is only required when an integrated accounting system is not present.			
issues shipments.rpt	**Sales By Product**	William R. Elder, CPIM	21,504	08/21/20 5:31 pm
	This reports shows shipments based upon the Transaction History.			
shpnoinv.rpt	**Items Shipped But Not Invoiced Report**	William R. Elder, CPIM	31,744	08/21/20 5:28 pm
	This report looks for occurrences of a shipment, but no matching invoice quantity. It should be run at the end of the period to show that all shipment have been properly posted to your accounting system.			
slsandgm.rpt	**Sales & Gross Margin Report**	William R. Elder, CPIM	39,424	08/21/20 5:27 pm
	This report shows all sales information for invoices within a user defined date range. It then shows material, labor and overhead costs associated with that sale. w/ FOH as freight			

Accounts Receivable	Number of Files:	6		

Accounts Receivable - Balance

arbatch.rpt	**A/R Invoice Register**	William R. Elder, CPIM	33,280	08/21/20 5:24 pm
	This report reads all invoice batches posted from MAX in a user-defined period and summarizes all debit and credit information by batch number. It can be used to reconcile differences between MAX and your integrated accounting system.			

Accounts Receivable - Balance	Number of Files:	1		

Accounts Receivable - COGS

cstslsat.rpt	**Cost of Sales Report by Account Type**	William R. Elder, CPIM	39,936	08/21/20 5:03 pm
	This report lists all invoices created during the user-defined period and breaks the cost of sales into material, labor, and overhead. It also shows the profit margin. This report is sorted by account type and sales category.			
cstslscs.rpt	**Cost of Sales Report by Customer**	William R. Elder, CPIM	23,040	08/21/20 5:33 pm
	This report lists all invoices created during the user-defined period and breaks the cost of sales into material, labor, and overhead. It also shows the profit margin. This report is sorted by Customer Type and Customer			
cstslsdt.rpt	**Cost of Sales Report By Invoice & Date**	William R. Elder, CPIM	39,424	08/21/20 5:04 pm
	This report lists all invoices created during the user-defined period and breaks the cost of sales into material, labor, and overhead. It also shows the profit margin. This report is sorted by account type and sales category.			
cstslsinv.rpt	**Cost of Sales - Invoice**	William R. Elder, CPIM	35,840	08/21/20 5:23 pm

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	This report lists all invoices created during the user-defined period and breaks the cost of sales into material, labor, and overhead. It also shows the profit margin. This report is sorted by invoice number and then date. Based Upon Invoice Files, Not Part Master			
cstslspn.rpt	**Cost of Sales Report by Part ID**	William R. Elder, CPIM	39,936	08/21/20 5:07 pm
	This report lists all invoices created during the user-defined period and breaks the cost of sales into material, labor, and overhead. It also shows the profit margin. This report is sorted by sales category and then part identifier.			
cstslspn2.rpt	**Cost of Sales Report #2**	William R. Elder, CPIM	40,960	08/21/20 5:06 pm
	This report is the same as the cost of sales report above, except it uses the standard cost from a user-defined cost set. Uses Multiple Cost Data, By Sales Type, Category and Part ID			
cstslstr.rpt	**Cost of Sales By Territory Report**	William R. Elder, CPIM	39,936	08/21/20 5:23 pm
	This report lists all invoices created during the user-defined period and breaks the cost of sales into material, labor, and overhead. It also shows the profit margin. This report is sorted by the territory and then customer identifier.			
mtdcogs.rpt	**MTD/YTD Cost of Sales Report**	William R. Elder, CPIM	35,840	08/21/20 5:06 pm
	This report shows all product shipments by commodity code and part number. It shows both the month to date and year to date shipments for each part shipped.			
Accounts Receivable - COGS	Number of Files:	8		

Accounts Receivable - Invoices

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
cnmr_cst.rpt	**Contribution by Customer**	William R. Elder, CPIM	38,400	08/21/20 4:59 pm
	This report lists all invoiced orders in a user-defined date range. It analyzes the extended selling price and selling cost and calculates the contribution margin (i.e., price-cost/price) on each invoice. The average selling prices are also calculated. It is summarized by customer identifier.			
cnmr_prd.rpt	**Contribution by Product**	William R. Elder, CPIM	38,400	08/21/20 4:59 pm
	This report lists all invoiced orders in a user-defined date range. It analyzes the extended selling price and selling cost and calculates the contribution margin (i.e., price-cost/price) on each invoice. The average selling prices are also calculated. It is summarized by part identifier.			
customers_decendingsales.rpt	**Alpha Customer - Descending Sales**	William R. Elder, CPIM	21,504	08/21/20 5:28 pm
	This report lists all invoiced orders in a user-defined date range and displays then sorts the data by descending sales dollar.			
geosales.rpt	**Geographic Sales Report**	William R. Elder, CPIM	36,352	08/21/20 4:57 pm
	This report lists all invoiced orders in a user-defined date range and displays the order information for each line. It then shows where those sales took place geographically on a world map. This is a fun example of how to use Crystal graphs.			
intsale.rpt	**International Sales Report**	William R. Elder, CPIM	38,400	08/21/20 4:57 pm
	This report lists all invoiced orders in a user-defined date range and displays the order information for each line. It is sorted by bill-to country and then by customer. International Customerd have Customer Type Beginning with "I"			
invcesum.rpt	**Invoice Summary Report**	William R. Elder, CPIM	36,352	08/21/20 5:28 pm
	This report shows all of the information in the invoice footer for a user defined period of time.			
invquery.rpt	**Invoice Query by Amount**	William R. Elder, CPIM	31,232	08/21/20 5:26 pm
	This report will allow a user to enter an invoice amount. It then traverses the Invoice Master file, looking for that amount and shows all invoices that match.			
invqury2.rpt	**Invoice Query by Invoice Number**	William R. Elder, CPIM	31,232	08/21/20 5:24 pm
	This report will allow a user to enter an invoice number. It then traverses the Invoice Master file and shows the invoice that matches.			
invtaxdata.rpt	**Sales Tax Analysis**	William R. Elder, CPIM	84,480	08/21/20 5:32 pm
	This report pulls invoice information and shows tax data.			
quick_sales_history.rpt	**Quick Sales History**	William R. Elder, CPIM	38,400	08/21/20 4:57 pm
	Another report to show sales history by customer.			
sales_info.rpt	**Sales Information**	William R. Elder, CPIM	19,968	08/21/20 5:30 pm
	Shows ship date, order and invoice numbers, invoiced dollars and then name and address information for a user defined date range			
shipdet.rpt	**Ship Detail By Type Report**	William R. Elder, CPIM	35,328	08/21/20 5:30 pm
	This report lists shipments and cost of sales data based upon the standard cost of the part.			
shipdet1.rpt	**Ship Detail By Type Report**	William R. Elder, CPIM	38,400	08/21/20 5:30 pm
	This report is the same as the ship detail report above, except it uses the standard cost from a user-defined cost set. Uses Cost Set Data			
slcom.rpt	**Sales Commission Report #1**	William R. Elder, CPIM	35,840	08/21/20 5:10 pm
	This report lists all commission expense activity as a result of invoicing a sales order. It is sorted by rep and invoice number. Notes: 1. You must be attaching reps to sales orders and including a commission percentage on the order for this report to work properly (many clients attach reps, but do not add the commission percentage). 2. See Quota Report based upon bookings for sales order received but not invoiced. Sales Rep #1			

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FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
slcom2.rpt	**Sales Commission Report #2**	William R. Elder, CPIM	34,816	08/21/20 5:09 pm
	This report lists all commission expense activity as a result of invoicing a sales order. It is sorted by rep and invoice number. Sales Rep #2			
slcom3.rpt	**Sales Commission Report #3**	William R. Elder, CPIM	34,816	08/21/20 5:09 pm
	This report lists all commission expense activity as a result of invoicing a sales order. It is sorted by rep and invoice number. Sales Rep #3			
slqtyprt.rpt	**Sales History by Part ID**	William R. Elder, CPIM	35,840	08/21/20 5:01 pm
	This report reads the invoice files and displays the total quantity sold for each part identifier. It shows the total quantity sold, average quantity sold, the highest quantity sold and the number of lines the item appears on. It is a very useful report for tracking quantities throughout the year.			
slsandgm1.rpt	**Sales & Gross Margin Report**	William R. Elder, CPIM	79,360	08/21/20 5:27 pm
	This is another report that shows sales and cost information. This report however is concerned with the shop order to build the shipment (i.e., assemble to order or make to order environment). It is formatted similarly to the Total Order Cost report.			
slsbyat.rpt	**Sales By Account Type**	William R. Elder, CPIM	37,376	08/21/20 4:56 pm
	Sales by Account Type			
slsbycountry.rpt	**Sales By Country**	William R. Elder, CPIM	39,424	08/21/20 4:57 pm
	This report lists all invoiced orders in a user-defined date range and displays the order information for each line. It is sorted by country and then by customer.			
slsbycs.rpt	**Sales By Customer**	William R. Elder, CPIM	34,816	08/21/20 5:15 pm
	This report lists all invoiced orders in a user-defined date range and displays the order information for each line. It is sorted by customer identifier.			
slsbydt.rpt	**Sales By Invoice / Date**	William R. Elder, CPIM	35,328	08/21/20 4:56 pm
	This report lists all invoiced orders in a user-defined date range and displays the order information for each line. It is sorted by invoice date and then by invoice.			
slsbydt2.rpt	**Sales By Date / Invoice No.**	William R. Elder, CPIM	45,056	08/21/20 4:56 pm
	This report is basically the same as the Sales by Invoice report except it includes the line item notes for the invoice.			
slsbydt3.rpt	**Sales By Date / Invoice**	William R. Elder, CPIM	46,080	08/21/20 4:56 pm
	This report is basically the same as the Sales by Invoice report except it includes the line item notes for the invoice and some special formulas for analyzing the sales order notes.			
slsbypn.rpt	**Sales By Product**	William R. Elder, CPIM	36,864	08/21/20 5:14 pm
	This report lists all invoiced orders in a user-defined date range and displays the order information for each line. It is sorted by sales category and then by part identifier.			
slsbyst.rpt	**Sales By State Summary Report**	William R. Elder, CPIM	36,864	08/21/20 5:14 pm
	Summarizes invoices and sales taxes charged in a user defined invoice date range.			
slsbyst1.rpt	**Sales By State**	William R. Elder, CPIM	42,496	08/21/20 5:13 pm
	This report lists all invoiced orders in a user-defined date range and displays the order information for each line. It is sorted by state and then by customer.			
slsbytr.rpt	**Sales By Territory**	William R. Elder, CPIM	35,328	08/21/20 5:13 pm
	This report lists all invoiced orders in a user-defined date range and displays the order information for each line. It is sorted by sales territory and then by customer.			
slshist$.rpt	**Sales History $ Report**	William R. Elder, CPIM	38,912	08/21/20 5:00 pm
	This report reads the invoice files and displays the total dollars sold for each part identifier in the twelve monthly columns. It is a very useful report for tracking quantities throughout the year.			
slshist.rpt	**Sales History Report**	William R. Elder, CPIM	35,840	08/21/20 5:02 pm
	This report reads the invoice files and displays the total quantity sold for each part identifier in the twelve monthly columns. It is a very useful report for tracking quantities throughout the year.			
slshist quarter.rpt	**Sales History Report By Quarter**	William R. Elder, CPIM	39,936	08/21/20 5:01 pm
	This report reads the invoice files and displays the total dollars sold for each part identifier in the four quarterly columns. It is a very useful report for tracking quantities throughout the year. has Dynamic Quarterly Columns			
taxrpt.rpt	**Monthly Sales Tax Report**	William R. Elder, CPIM	35,840	08/21/20 5:12 pm
	This report shows all invoices for a user defined period of time and the sales tax associated to them. It is not associated with a sales tax field, but instead looks for sales in a particular city and state.			

Accounts Receivable - Invoices Number of Files: 32

General Ledger

badgl.rpt	**General Ledger Expense**	William R. Elder, CPIM	35,840	08/21/20 11:24 am
	This report troubleshoots situations where shop orders were transacted with GL Override codes.			
bulkwiptransactions.rpt	**Bulk WIP By Period**	William R. Elder, CPIM	71,168	08/21/20 11:19 am

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	This report is shows all transactions to the BULKWIP account for a user defined time period. Please note that while BULKWIP is not an asset account with a balance, activity must still be monitored and understood as the difference between debits and credits will impact the profit and loss statement.			
clsord.rpt	**Closed Order Report**	William R. Elder, CPIM	30,208	08/21/20 11:08 am
	This report lists all status 4 (closed) work orders from the Master Scheduling and Shop Floor Control modules. It should be used to verify all completed orders are posted through to status 5 at the end of the period.			
ernhrs.rpt	**Earned Hours**	William R. Elder, CPIM	38,400	08/21/20 11:08 am
	This report is a version of the GLPROOF Report that pulls all instances of the labor variance account from the Work GL file for a user defined date range. This report was written for a company that is running standard labor in their costing, but not posting actual labor. In this environment, the labor variance is the earned hours. The report shows all orders and the standard hours earned. Status 5 orders only.			
ernhrs2.rpt	**Earned Hours for Status 3 & 4 Orders**	William R. Elder, CPIM	33,280	08/21/20 11:08 am
	This report is a version of the End of Period WIP Report that pulls all completions of work orders and extends the quantities by the standard cost for labor. This report was written for a company that is running standard labor in their costing, but not posting actual labor. In this environment, the labor portion of the work orders that had activity, but were not completed through to status 5. The report shows all orders and the standard hours earned.			
fromtoerror.rpt	**From To Charge Error Report**	William R. Elder, CPIM	68,608	08/21/20 11:09 am
	This report prompts you for a MAX Transaction ID number and then pulls the record associate with it. It is a troubleshooting report.			
glexp.rpt	**General Ledger Expense**	William R. Elder, CPIM	36,864	08/21/20 11:23 am
	This report shows all MAX activity for a general ledger account for a user specific date range an account number. It was written to help explain differences between MAX and your integrated accounting system. It is like the GLREF report, but prompts the user for an account number. It is sorted by account, document id and customer/vendor.			
glnoninv.rpt	**GL Proof - Non-Inventoried PO's**	William R. Elder, CPIM	35,328	08/21/20 11:18 am
	This report pulls transactions from the General Ledger Work file for non-inventoried receipts.			
glproof.rpt	**G/L Proof**	William R. Elder, CPIM	32,768	08/21/20 11:20 am
	This was the original general ledger proof report where the user enters a GL account number and the report pulls all activity for that account from the Work GL table.			
glproof4.rpt	**Departmental Expense**	William R. Elder, CPIM	37,376	08/21/20 11:18 am
	This report is the same as the expense detail report, but only looks for the 4 digit portion of the account number. This is helpful for organizations that have multiple departments coded in their general ledger account structure. It is useful for explaining expense accounts that span across departments. Report to list the net debits and credits from the MAX GL Work file.			
glpyld.rpt	**GL Proof - Yield**	William R. Elder, CPIM	35,328	08/21/20 11:17 am
	This report is a special version of the GLPROOF report for the Yield account. Report to list the net debits and credits from the MAX GL Work file.			
glrefglsum.rpt	**GL Expense Proof**	William R. Elder, CPIM	36,352	08/21/20 11:17 am
	This report shows all MAX activity for a general ledger account for a user specific date range an account number. It was written to help explain differences between MAX and your integrated accounting system. It is like the GLREF report, but prompts the user for an account number. It is sorted by account, document id and customer/vendor.			
glrefinv.rpt	**GL Proof - Inventory**	William R. Elder, CPIM	36,352	08/21/20 11:10 am
	This report is a special version of the GLPROOF report for the stockroom inventory accounts.			
glreflvr.rpt	**GL Proof Report - Labor Variance**	William R. Elder, CPIM	34,816	08/21/20 11:11 am
	This report is a special version of the GLPROOF report for the Labor Variance account. Report to list the net debits and credits from the MAX GL Work file.			
glrefmvr.rpt	**GL Proof - Material Variance**	William R. Elder, CPIM	34,816	08/21/20 11:11 am
	This report is a special version of the GLPROOF report for the Manufacturing Variance account.			
glrefpay.rpt	**GL Proof - Accrued Labor**	William R. Elder, CPIM	35,840	08/21/20 11:11 am
	This report is a special version of the GLPROOF report for the Labor Applied account. It was written to help tie Accrued labor in MAX to the payroll from a payroll service company.			
glrefwip.rpt	**GL Expense - WIP**	William R. Elder, CPIM	36,352	08/21/20 11:10 am
	This report is a special version of the GLPROOF report for the WIP account.			
glsubc.rpt	**GL Proof - Sub-Contract**	William R. Elder, CPIM	37,888	08/21/20 11:16 am
	This report analyzes all transactions on a subcontract order. It pulls all activity from the GL work file (i.e., issues, transfers to vendor, receipts, variances, etc.) for that particular order and shows the total order cost.			
glworkorderdetailedentries.rpt	**GL Transactions by Order Number**	William R. Elder, CPIM	30,208	08/21/20 11:15 am
	This report prompts for an order number and then pulls all transactions against that order. Use it for any order type that has transactions.			
hrserned.rpt	**Standard Hours Earned**	William R. Elder, CPIM	35,840	08/21/20 11:08 am
	This report pulls all work order receipts from the transaction history file. It then pulls the routing information and summarizes the labor hours by part and work center. It was designed for the firm who runs standard hours in their product costs, but does not post actual labor on work orders. It will also work with the Repetitive Manufacturing module.			
laborbyworkcenter.rpt	**Actual Labor By Work Center**	William R. Elder, CPIM	70,144	08/21/20 11:13 am

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	This report pulls labor transactions from the Transaction History table.			
labvar.rpt	**Labor Variance Report**	William R. Elder, CPIM	39,424	08/21/20 11:13 am
	This version of the Labor Variance pulls the detail from the shop floor for analysis.			
max_PandL.rpt	**MAX Financial Statement**	William R. Elder, CPIM	34,304	08/21/20 11:05 am
	This report shows MAX activity in a Profit and Loss (P&L) statement format. Keep in mind that MAX is not an accounting system so that all P&L activity is not on this report, just activity that MAX knows about.			
obsexp.rpt	**Obsolete Expense Report**	William R. Elder, CPIM	33,280	08/21/20 10:59 am
	This report reads all records in the transaction history file that contain "OB" in their general ledger reference field. "OBx" is typically used to code the writing of obsolete inventory.			
potwovar.rpt	**Potential Variance Report**	William R. Elder, CPIM	53,248	08/21/20 11:04 am
	This report lists all status 3 (open) work orders from the Master Scheduling and Shop Floor Control modules that have non-zero "potential" variances. The report was used to help identify which orders have variances before they are closed.			
stockrevaluationbyperiod.rpt	**Stock Revaluation By Period**	William R. Elder, CPIM	71,168	08/21/20 11:04 am
	This report shows all MAX activity posted for Transaction Code "E" records.			
whenclosed.rpt	**When Closed Report**	William R. Elder, CPIM	34,816	08/21/20 11:03 am
	This report lists all work orders that have had labor or material variances generated. It reports the date that the variance occurred which indicates when the work order was closed. This report can also be used to determine if a work order was post order closed more than once.			
womatlvar.rpt	**Work Order Material Variance**	William R. Elder, CPIM	34,304	08/21/20 11:02 am
	This report lists all status 4 (closed) work orders from the Master Scheduling and Shop Floor Control modules that have non-zero "potential" variances. The report was used to help identify which orders have variances since the Total Order Cost Report has had problems. Note: This report is for system configurations with no standard labor in use.			
womatlvar2.rpt	**Work Order Material Variance**	William R. Elder, CPIM	35,840	08/21/20 11:02 am
	This report lists all status 4 (closed) work orders from the Master Scheduling and Shop Floor Control modules that have non-zero "potential" variances. The report was used to help identify which orders have variances since the Total Order Cost Report has had problems. Note: This report is for system configurations with no standard labor in use. For use with Labor in Standard Cost			
yield4.rpt	**Product Line Yield**	William R. Elder, CPIM	44,032	08/21/20 11:03 am
	This report is calculates the amount of yield received to stock on work orders.			
General Ledger	Number of Files: 30			

Multiple Cost

costchng.rpt	**Change in Inventory Due to Cost Change**	William R. Elder, CPIM	33,792	08/21/20 8:30 am
	This report compares the parts master file against a user-definable cost set for the purpose of determining specifically where inventory changes have occurred due to a change in standard cost. The cost set is to be saved just prior to changing costs and running the roll-up (or run the roll-up to a new cost set). Requires the multiple cost option.			
cstchang.rpt	**Costs That Have Changed**	William R. Elder, CPIM	32,256	08/21/20 8:30 am
	This report shows all parts who's standard cost has changed from a user-defined beginning date. It can be used to help determine why your integrated accounting system is not in balance.			
cstsetcomp.rpt	**Cost Comparison Report**	William R. Elder, CPIM	33,280	08/21/20 8:35 am
	This report compares the standard cost from one multiple cost set against another stored cost set for the purpose of determining specifically where standard changes have occurred.			
mlcstbom2.rpt	**Multi-Level Costed BOM Report #2**	William R. Elder, CPIM	50,688	08/21/20 8:33 am
	This report lists a multiple level costed BOM (up to six levels) for a user-defined parent part identifier. It uses a user defined Multiple Cost Set for the cost.			
slcstbom.rpt	**Single-Level Costed BOM Report #2**	William R. Elder, CPIM	36,864	08/21/20 8:32 am
	This report lists a single level – costed BOM for a user-defined parent part identifier. Note: This report will show historical BOM's and their components. Using Multiple Cost Data			
Multiple Cost	Number of Files: 5			

Product Costing

costdist.rpt	**Cost Distribution Report**	William R. Elder, CPIM	30,208	08/21/20 8:27 am
	This report takes the cost from the part master file and counts how many records fall within user-definable cost ranges. It is useful for analyzing very high unit costs and can be used in subjective ABC analysis.			
costover.rpt	**Parts Over $X**	William R. Elder, CPIM	30,208	08/21/20 8:27 am
	This report takes the cost from the part master file and counts how many records fall equal to or greater than a user-definable unit cost. It is useful for analyzing very high unit costs and can be used in subjective ABC analysis.			
costprt.rpt	**Part Cost by Commodity Code**	William R. Elder, CPIM	32,256	08/21/20 8:26 am
	This report shows the cost elements for each part, sorted by Commodity Code.			
ordercosthistory.rpt	**Order Cost History**	William R. Elder, CPIM	46,080	08/21/20 8:26 am

1/5/2021   9:22:59AM

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	This report shows the cost of the order in terms of the current part master and the actual costs from the transaction history table.			
	Original report from Exact Software. Uses transaction cost not part mastrer cost.			
srlaborcost.rpt	**Labor Cost Sub-report**	William R. Elder, CPIM	37,888	08/21/20 8:24 am
	This report lists can be used to show planned and actual labor costs for a shop order. This report was used in the MAX Total Order Cost Report up to MAX v5.5.3.			
	From Total Order Cost Report			
srmaterialcost.rpt	**Material Cost Sub-report**	William R. Elder, CPIM	37,888	08/21/20 8:26 am
	This report lists can be used to show planned and actual material costs for a shop order. This report was used in the MAX Total Order Cost Report up to MAX v5.5.3.			
	From Total Order Cost Report			
Product Costing	Number of Files:	6		
06 - Finance	**Number of Files:**	**102**		

07 - Information Technology

External Custom Reports

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
invportx.rpt	**External Invoice for MAX**	William R. Elder, CPIM	112,128	08/21/20 6:51 am
	A portrait version of the Invoice. This report has been formatted for plain paper.			
	This report can be run outside of MAX.			
	Report written to send invoices unattended using Visual Cut			
poport recv.rpt	**Purchase Order - Receiving**	William R. Elder, CPIM	94,720	08/21/20 7:01 am
	A portrait version of the Purchase Order with a slightly different format. This report has been designed to print on the receiving dock during the receiving process. It is formatted for plain paper.			
	This report can be run outside of MAX.			
porega.rpt	**Purchase Order**	William R. Elder, CPIM	68,608	08/21/20 7:03 am
	A portrait version of the Purchase Order with a slightly different format. This report has been formatted for plain paper.			
	This report can be run outside of MAX.			
	From Lousie Lanctot @ Workplace Systems.			
poregb.rpt	**Purchase Order**	William R. Elder, CPIM	69,120	08/21/20 6:54 am
	A portrait version of the Purchase Order. This report has been formatted for plain paper. This report can be run outside of MAX.			
	From Louise Lanctot @ Workplace Systems			
qtport ext.rpt	**Quote - Portrait - v5.5.7**	William R. Elder, CPIM	73,728	08/21/20 6:18 pm
	qtport.rpt modified to run outside of MAX			
saland3.rpt	**Sales Acknowledgement - Landscape**	William R. Elder, CPIM	85,504	08/21/20 6:51 am
	A portrait version of the Sales Acknowledgement. This report has been formatted for plain paper. This report can be run outside of MAX.			
	Shows Cost Per Unit and Extended Cost			
saport ext.rpt	**Sales Acknowledgement - v5.5.7**	William R. Elder, CPIM	71,168	08/21/20 6:18 pm
	saport.rpt modified to run outside of MAX			
External Custom Reports	Number of Files:	7		

Internal Custom Reports

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
invcycw.rpt	**Cycle Count Worksheet w/Lot Tracking Support**	William R. Elder, CPIM	35,328	08/21/20 6:54 am
	This report is another version of the MAX cycle count worksheet.			
Internal Custom Reports	Number of Files:	1		

Internal Custom Reports - Shipthrough

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
invport1st v557.rpt	**Invoice w/Ship Through - Portrait**	William R. Elder, CPIM	48,128	08/21/20 7:24 am
	A portrait version of the standard MAX invoice. This report prints on plain paper and shows the Ship Through Address.			
pklport1st v557.rpt	**Packing List w/Ship Through - Portrait - v5.5.7**	William R. Elder, CPIM	39,936	08/21/20 7:24 am
	A portrait version of the standard MAX packing list. This report prints on plain paper and shows the Ship Through Address.			
saland1st v557.rpt	**Proforma Invoice - Portrait - v5.5.7**	William R. Elder, CPIM	38,912	08/21/20 7:25 am
	A portrait version of the Sales Acknowlement that has been labed as a Pro-forma invoice.			
saport1st v557.rpt	**Sales Acknowledgement w/Ship Through - Portrait - v**	William R. Elder, CPIM	39,936	08/21/20 7:24 am
	A portrait version of the standard MAX sales acknowledgement. This report prints on plain paper and shows the Ship Through Address.			
soport1st v557.rpt	**Sales Order w/Ship Through - Portrait - v5.5.7**	William R. Elder, CPIM	38,912	08/21/20 7:23 am
	A portrait version of the standard MAX sales order. This report prints on plain paper and shows the Ship Through Address.			
Internal Custom Reports - Shipth	Number of Files:	5		

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
Internal Custom Reports - v5.5.10				
invland1 v5510.rpt	**Invoice - Landscape - v5.5.10**	William R. Elder, CPIM	46,592	08/21/20 7:38 am
	This is a formatted Invoice in Landscape mode.			
invport1 consolidated v5510.rpt	**Consolidated Invoice - Portrait - v5.5.10**	William R. Elder, CPIM	43,520	08/21/20 7:38 am
	This is a formatted Consolidated Invoice in Portrait mode.			
invport1 v5510.rpt	**Invoice - Portrait - v5.5.10**	William R. Elder, CPIM	46,592	08/21/20 7:38 am
	This is a formatted Invoice in Portrait mode.			
invpr1 v5510.rpt	**Complete Purchase Requisition**	William R. Elder, CPIM	90,624	08/21/20 7:37 am
	This version of the MAX Purchase Requisition provides much more data for the buyers.			
invvals1 v5510.rpt	**Inventory Value Report - v5.5.10**	William R. Elder, CPIM	33,792	08/21/20 7:37 am
	This version of the Inventory Value Report separates Consignment Inventory			
pklland1 v5510.rpt	**Packing List - Landscape - v5.5.10**	William R. Elder, CPIM	38,912	08/21/20 7:37 am
	This is a formatted Packing List in Landscape mode.			
pklport1 v5510.rpt	**Packing List - Portrait - v5.5.10**	William R. Elder, CPIM	38,912	09/06/20 10:10 am
	This is a formatted Packing List in Portrait mode.			
poland1 v5510.rpt	**Purchase Order - Landscape - v5.5.10**	William R. Elder, CPIM	81,920	08/21/20 7:37 am
	This is a formatted Purchase Order in Landscape mode.			
poport1 v5510.rpt	**Purchase Order - Portrait - v5.5.10**	William R. Elder, CPIM	82,432	08/21/20 7:37 am
	This is a formatted Purchase Order in Portrait mode.			
qtland1 v5510.rpt	**Quote - Landscape - v5.5.10**	William R. Elder, CPIM	39,424	08/21/20 7:37 am
	This is a formatted Quote in Landscape mode.			
qtport1 v5510.rpt	**Quote - Portrait - v5.5.10**	William R. Elder, CPIM	39,936	08/21/20 7:36 am
	This is a formatted Quote in Portrait mode.			
saland1 v5510.rpt	**Sales Acknowledgement - Landscape - v5.5.10**	William R. Elder, CPIM	38,912	08/21/20 7:36 am
	This is a formatted Sales Acknowledgement in Landscape mode.			
saport1 v5510.rpt	**Sales Acknowledgement - Portrait - v5,5.10**	William R. Elder, CPIM	38,912	08/21/20 7:36 am
	This is a formatted Sales Acknowledgement in Portrait mode.			
shppaper v5510.rpt	**Shop Floor Paperwork - v5.5.10**	William R. Elder, CPIM	44,544	08/21/20 7:36 am
	This is a cleaned-up version of the Shop Paperwork. Fixes part description issues.			
shppaperbc v5510.rpt	**Shop Floor Paperwork with Bar Code - v5.5.10**	William R. Elder, CPIM	45,568	08/21/20 7:36 am
	This version of the Shop Order contains bar code data for the order number, component part number and sequence numbers.			
soland1 v5510.rpt	**Sales Order - Landscape - v5.5.10**	William R. Elder, CPIM	37,376	08/21/20 7:35 am
	This is a formatted Sales Order in Landscape mode.			
soport1 v5510.rpt	**Sales Order - Portrait - v5.5.10**	William R. Elder, CPIM	36,864	08/21/20 7:35 am
	This is a formatted Sales Order in Portrait mode.			
srBillShipAddress v5510.rpt	**SubReport - Bill and Ship Address Formatting - SOP**	William R. Elder, CPIM	30,208	10/20/20 3:41 am
	This is the MAX Bill and Ship To Address formatting sub-report. It has been cleaned-up to shpw all address lines correctly.			
srGetShipVia.rpt	**SubReport - Get Ship Via**	William R. Elder, CPIM	28,160	10/20/20 3:41 am
	This report calls the Ship Via Data from the Code Master table. It can be used to to replaccce MAX database calls when converting an internal report to run externally.			
srGetTerms.rpt	**SubReport - Get Terms Description**	William R. Elder, CPIM	28,160	10/20/20 3:41 am
	This report calls the Terms Code data from the Code Master table. It can be used to to replaccce MAX database calls when converting an internal report to run externally.			
Internal Custom Reports - v5.5.1(	Number of Files: 20			
Internal Custom Reports - v5.5.6				
qtport1 556.rpt	**Quote - Portrait - v5.5.6**	William R. Elder, CPIM	47,104	08/21/20 7:48 am
	A portrait version of the standard MAX quote from MAX v5.5.6. This report prints on plain paper. With Sales Order Number.			
saport1 556.rpt	**Sales Acknowledgement - Portrait - v5.5.6**	William R. Elder, CPIM	48,128	08/21/20 7:55 am
	A portrait version of the standard MAX sales acknowledgement from MAX v5.5.6. This report prints on plain paper. With Quote Number			
Internal Custom Reports - v5.5.6	Number of Files: 2			
Internal Custom Reports - v5.5.7				
invland1 557.rpt	**Invoice - Landscape - v5.5.7**	William R. Elder, CPIM	46,592	08/21/20 7:53 am
	A landscape version of the standard MAX invoice. This report prints on plain paper.			
invport1 557.rpt	**Invoice - Portrait - v5.5.7**	William R. Elder, CPIM	46,080	08/21/20 7:53 am

1/5/2021   9:22:59AM

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
	A portrait version of the standard MAX invoice. This report prints on plain paper.			
invport1 consolidated 557.rpt	**Consolidated Invoice - Portrait - v5.5.7**	William R. Elder, CPIM	43,520	08/21/20 7:54 am
	A portrait version of the standard MAX consolidated invoice. This report prints on plain paper.			
invpr.rpt	**Complete Purchase Requisition**	William R. Elder, CPIM	91,648	08/21/20 7:53 am
	A better version of the Purchase Requisition form showing much more information about the part. This report prints on plain paper.			
invvals.rpt	**Inventory Value Report**	William R. Elder, CPIM	33,792	08/21/20 7:54 am
	This version of the Inventory Value report has a sub-total for Consignment Inventory.			
pklland1 557.rpt	**Packing List - Landscape - v5.5.7**	William R. Elder, CPIM	38,400	08/21/20 7:52 am
	A landscape version of the standard MAX packing list. This report prints on plain paper.			
pklport1 557.rpt	**Packing List - Portrait - v5.5.7**	William R. Elder, CPIM	38,400	08/21/20 7:52 am
	A portrait version of the standard MAX packing list. This report prints on plain paper.			
poland1 557.rpt	**PO - Landscape - v5.5.7**	William R. Elder, CPIM	81,920	08/21/20 7:52 am
	A landscape version of the standard MAX purchase order. This report prints on plain paper.			
poport1 557.rpt	**PO - Portrait - v5.5.7**	William R. Elder, CPIM	81,920	08/21/20 7:51 am
	A portrait version of the standard MAX purchase order. This report prints on plain paper.			
porecvpage1.rpt	**PO Receiver - Detailed**	William R. Elder, CPIM	81,920	08/22/20 7:27 am
	This report shows prints a MAX PO receiver.			
qtland1 557.rpt	**Quote - Landscape - v5.5.7**	William R. Elder, CPIM	38,400	08/21/20 7:49 am
	A landscape version of the standard MAX quote. This report prints on plain paper.			
qtport1 557.rpt	**Quote - Portrait - v5.5.7**	William R. Elder, CPIM	38,400	08/21/20 7:48 am
	A portrait version of the standard MAX quote. This report prints on plain paper.			
saland1 557.rpt	**Sales Acknowledgement - Landscape - v5.5.7**	William R. Elder, CPIM	38,400	08/21/20 7:50 am
	A landscape version of the standard MAX sales acknowledgement. This report prints on plain paper.			
saport1 557.rpt	**Sales Acknowledgement - Portrait - v5.5.7**	William R. Elder, CPIM	38,400	08/21/20 7:49 am
	A portrait version of the standard MAX sales acknowledgement. This report prints on plain paper.			
shppaper 557.rpt	**Shop Paperwork**	William R. Elder, CPIM	44,544	08/21/20 7:51 am
	An updated version of the standard MAX shop paperwork. This report prints on plain paper.			
shppaperbc 557.rpt	**Shop Paperwork - v5.5.7**	William R. Elder, CPIM	45,056	08/21/20 7:51 am
	n updated version of the standard MAX shop paperwork with order numbers and sequences bar-coded. This report prints on plain paper.			
soland1 557.rpt	**Sales Order - Landscape - v5.5.7**	William R. Elder, CPIM	37,376	08/21/20 7:50 am
	A landscape version of the standard MAX sales order. This report prints on plain paper.			
soport1 557.rpt	**Sales Order - Portrait - v5.5.7**	William R. Elder, CPIM	36,864	08/21/20 7:50 am
	A portrait version of the standard MAX sales order. This report prints on plain paper.			
srBillShipAddress 557.rpt	**Bill Ship Address Sub-report**	William R. Elder, CPIM	30,720	08/21/20 7:55 am
	This MAX sub-report has address errors fixed			

Internal Custom Reports - v5.5.7   Number of Files: 19

MAX Data Collection Module (MDCM)

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
badge.rpt	**Employee ID Badge**	William R. Elder, CPIM	99,328	08/21/20 9:02 am
	Runs from badge.mdb Access database. Print an employee identification badge, including a picture of the employee using this Microsoft Access database and corresponding Crystal report. This report has been formatted to print on 2.25 x 3.5″ card stock (8 per page). The report uses a 2 x 2″ photograph of each employee.			
labelbag.rpt	**Bag Label**	William R. Elder, CPIM	25,600	08/21/20 9:04 am
	Print a bag label with barcodes. This report has been formatted for a 2.125 x 2″ thermal label. Designed to apply to bags of parts stored in small parts bins. Can be triggered from an inventory transaction other than an order receipt. Used in Small Parts Kitting.			
labelbin.rpt	**Bin Label w/Barcode**	William R. Elder, CPIM	30,208	08/21/20 9:04 am
	Print a bin label with barcodes. This report has been formatted for an Avery 6460 label. Designed for small parts bins.			
labelporecpt.rpt	**PO Receipt Label w/Barcode**	William R. Elder, CPIM	25,088	08/21/20 9:05 am
	Print a bag label with barcodes. This report has been formatted for a 2.125 x 2.125 x 2" thermal label. Designed to apply to bags of parts stored in small parts bins. Can be triggered from an purchase order receipt transaction.			
labelstock.rpt	**Stockroom Label w/Barcode**	William R. Elder, CPIM	28,672	08/21/20 9:03 am
	Print a stockroom label with barcodes. This report has been formatted for an Avery 6460 label. Design for small stockrooms and not warehouse racks.			
labelunpissue.rpt	**Unplanned Issue Label**	William R. Elder, CPIM	25,600	08/21/20 9:05 am
	Print a bag label with barcodes. This report has been formatted for a 2.125 x 2″ thermal label. Designed to apply to bags of parts stored in small parts bins. Can be triggered from an unplanned issue transaction.			

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
labelwocomp.rpt	**WO Component Label w/Barcode**	William R. Elder, CPIM	25,600	08/21/20 9:07 am
	Print a bag label with barcodes. This report has been formatted for a 2.125 x 2″ thermal label. Designed to apply to bags of parts stored in small parts bins. Can be triggered from a work order receipt transaction.			
labelworecpt.rpt	**WO Receipt Label w/Barcode**	William R. Elder, CPIM	25,600	08/21/20 9:06 am
	Print a bag label with barcodes. This report has been formatted for a 2.125 x 2″ thermal label. Designed to apply to bags of parts stored in small parts bins. Can be triggered from a work order receipt transaction.			
listempid.rpt	**Employee ID List w/Barcode**	William R. Elder, CPIM	26,624	08/21/20 9:02 am
	Print a list of employee identifiers with barcodes. This report has been formatted for plain paper. Prints on 8.5 x 11" plain paper			
listglref.rpt	**GL Reference List w/ Barcodes**	William R. Elder, CPIM	26,112	08/21/20 9:03 am
	Print a list of general ledger override codes with barcodes. This report has been formatted for plain paper. Prints on 8.5 x 11" plain paper			
liststockid.rpt	**Stock ID List w/Barcode**	William R. Elder, CPIM	26,112	08/21/20 9:02 am
	Print a list of stockroom identifiers with barcodes. This report has been formatted for plain paper. Prints on plain 8.5 x 11" paper			
MAX Data Collection Module (M	**Number of Files:**	11		
07 - Information Technology	**Number of Files:**	65		

08 - Data & Reporting

Data Audit

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
data_responsibility_buy.rpt	**Data Responsibility Report - Buy**	William R. Elder, CPIM	70,656	08/21/20 5:30 am
	This audit report tests many fields for purchased parts for relevance and shows those that have issues. Parts with no issues are supressed.			
data_responsibility_make.rpt	**Data Responsibility Report - Make**	William R. Elder, CPIM	82,432	08/21/20 5:30 am
	This audit report tests many fields for make parts for relevance and shows those that have issues. Parts with no issues are supressed.			
invalidcostconversions.rpt	**Invalid Cost Conversion Factors**	William R. Elder, CPIM	28,672	08/21/20 5:29 am
	This audit shows parts that have different Stock UOM and Purchase UOM, yet the Cost Conversion Factor is set to 1.			
invalidstatuscodes.rpt	**Invalid Status Codes**	William R. Elder, CPIM	30,720	08/21/20 5:28 am
	This audit compares the SO Detail status code to the Order Masterstatus code. Records must be in both files.			
mfgnobom.rpt	**MFG Parts with No BOM's**	William R. Elder, CPIM	30,208	08/21/20 5:27 am
	This audit shows parts coded as make, yet are not parents in a BOM.			
mfgnortg.rpt	**Mfg Parts Without Routings**	William R. Elder, CPIM	30,208	08/21/20 5:27 am
	This audit shows make parts that do not have a routing.			
mfgwithmanualcosttype.rpt	**Manufactured Parts With Incorrect Account Type**	William R. Elder, CPIM	28,672	08/21/20 5:26 am
	This audit shows make parts that are not automatically costed.			
noactyp.rpt	**Invalid Account Types**	William R. Elder, CPIM	29,184	08/21/20 5:26 am
	This audit verifies the correct account type code has been entered.			
nocost.rpt	**Parts With No Cost**	William R. Elder, CPIM	30,208	08/21/20 5:25 am
	This audit shows any part with no cost, entered after a user defined date. it avoids engineering status = 5 (obsolete).			
openorderswithinvalidduedates.rpt	**Open Orders with Invalid Due Dates**	William R. Elder, CPIM	28,160	08/21/20 5:24 am
	This audit shows any order that is less than 01/01/1980 and greater than 12/31/2030. Use this to resolve unexpected MAX crashes.			
orderswithnoheader.rpt	**PO's Missing Header Information**	William R. Elder, CPIM	46,080	08/21/20 5:22 am
	This audit shows PO Lines items without a PO Header record.			
ppwithautocosttype.rpt	**Purchased Parts With Incorrect Account Type**	William R. Elder, CPIM	28,672	08/21/20 5:21 am
	This audit verifies that purchased parts are automatically costed.			
ppwithnocstusg.rpt	**Parts With No Costs - Used in BOM**	William R. Elder, CPIM	47,616	08/21/20 5:20 am
	This audit shows purchaed parts with no cost. The report does not show engineering status 5 (obsolete) parts. If the part has been received, the PO Price is shown. It also shows if the part has open requirements (indicates it is active).			
ppwithoutleadtime.rpt	**Purchased Parts Without Lead Time**	William R. Elder, CPIM	28,672	08/21/20 5:17 am
	This audit shows purchased parts with no lead-time set. It avoids engineeering status 5 (obsolete) parts.			
ppwithoutprimary.rpt	**Purchased Parts Without Primary Vendor**	William R. Elder, CPIM	28,672	08/21/20 5:16 am
	This audit shows purachsed parts without a recommended vendor set in the part master.			
purnompn.rpt	**Purchased Parts with No Mfg PN's**	William R. Elder, CPIM	29,696	08/21/20 5:15 am
	This audit shows purchased parts that have their MPN Flag set to "Y", but no MPN has been entered.			
purparnt.rpt	**Purchased Parts as Parents in BOM**	William R. Elder, CPIM	32,256	08/21/20 5:14 am
	This audit shows parts coded as purchased, yet are parents in a BOM.			
stockwithnocost.rpt	**Stock With No Cost**	William R. Elder, CPIM	30,720	08/21/20 5:13 am
	This audit shows parts in stock with no standard cost.			

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FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
stockwithnocost1.rpt	**Stock With No Cost**	William R. Elder, CPIM	30,720	08/21/20 5:13 am
	This audit shows parts in stock with no standard cost. It is sorted by Stock ID.			

Data Audit	Number of Files:	19		

MAX Data

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
configurationindex.rpt	**Configuration Index Fields**	William R. Elder, CPIM	28,160	08/21/20 6:40 am
	This report lists the contents of System Manager - Activity - System Configuration.			
doclink.rpt	**Associated Documents**	William R. Elder, CPIM	26,112	08/21/20 6:40 am
	This report lists all of the documents associated in the system.			
fieldlistbyfile.rpt	**Field Listing by File**	William R. Elder, CPIM	29,184	08/21/20 6:40 am
	This report lists the contents of the MAX Field Master table. This data is another look at the Database Refernce data.			
scwrksht.rpt	**MAX Security Checklist**	William R. Elder, CPIM	27,136	08/21/20 6:40 am
	This report lists the sections for MAX Security.			

MAX Data	Number of Files:	4		

Miscellaneous

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
businessdaysbackwards.rpt	**Business Days Backward**	William R. Elder, CPIM	68,608	08/21/20 11:34 am
	This report contains the logic for calculating the number of business days between two dates. The calculation skips over Saturdays, Sundays and a user defined list of Holidays. While this report is not really an operational report by itself, the logic can be used to develop other custom reports.			
document properties.rpt	**Document Properties**	William R. Elder, CPIM	23,552	08/21/20 11:30 am
	This report illustrates Crystal Reports functionality to add additional data to reports.			
dupwebfilelisting.rpt	**Duplicate Web File Listing**	William R. Elder, CPIM	29,184	08/21/20 11:36 am
	Similar to the Web File Listing, excepts looks for duplicates.			
dupwebfilelisting2013.rpt	**Duplicate Web File Listing**	William R. Elder, CPIM	29,184	08/21/20 11:36 am
	This report lists contents of a file folder. Use it for troubleshooting setup issues and for other analysis.			
filelisting.rpt	**File Listing**	William R. Elder, CPIM	28,160	08/21/20 11:31 am
	This report lists contents of a file folder. Use it for troubleshooting setup issues and for other analysis. Reads from the local MAX\EFW folder.			
futurebusinessdays.rpt	**Business Days Forward**	William R. Elder, CPIM	28,160	08/21/20 11:31 am
	This report contains the logic for calculating the number of business days between now and a future date. While this report is not really an operational report by itself, the logic can be used to develop other custom reports.			
oneorall.rpt	**One or All Report**	William R. Elder, CPIM	29,696	08/21/20 11:31 am
	This report illustrates Crystal Reports functionality required to prompt for either one record or all records. It was used in a Solutions – CRW article.			
webfilelisting_2013.rpt	**Web File Listing v2013**	William R. Elder, CPIM	29,696	08/21/20 11:33 am
	Report used to create the Crystal Report report listing			

Miscellaneous	Number of Files:	8		

Report Extract

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME
rpt.rpt	**Report Extract Table Contents**	William R. Elder, CPIM	28,160	08/21/20 5:04 am
	Run in place of internal custom report to locate data in the table. Note: This report will give "Invalid index errors" because of the parameters MAX is trying to pass to the report. Just ignore them.			

Report Extract	Number of Files:	1		

08 - Data & Reporting	**Number of Files:**	**32**		
	Total Number of Files:	545		

FILE NAME	TITLE	AUTHOR	SIZE	DATE / TIME

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NOTES:
Unless otherwise noted, all reports from this site are written using OLE db(ADO) for Microsoft SQL data access.

Every attempt to create, document and distribute accurate custom reports has been made. When using reports that were created in other environments, there may may need to be some adjustments made due to differences in video and printer drivers. The most common problem is that the field is not large enough and data is cut off. Over time, many of the fields were enlarged and because of space limitations, some of these fields have not be "stretched" in reports.

Many of these reports were written for actual MAX clients. We have tried to eliminate all local conditions and leave the feastures of the report that support accepted MAX implementation standards. In some circumstances, you may find a report that still contains some "local" coding that you will have to eliminate. We srongly feel that it is still faster to modify an existing report, than to code the report from scratch.

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