



KnowledgeSync Alerts & Automation

MAX Event Pack

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MAX Event Pak

The following application groups and events are provided by MAX Professional Services to help you get started with Knowledge Sync Alerts & Automation (KSAA).¹ This document is to explain each of those events.

The KSAA style of reporting requires a different mindset for what is possible. Instead of thinking about a singular output, like you would for a crystal report, Excel spreadsheet or SQL Server Report Services (SSRS) report, you need to think about two things: 1) A trigger or event, and 2) The action to be taken. The trigger or event is when you want the action to take place. They could be when a field value changes, a new record added, the end of an elapsed time, or just about any other point that can be captured. The action could be an email, an email containing a crystal report, or a process (i.e., calling a SQL process to update to an existing table or to a custom table).

With a little imagination and creativity, you can solve many business process issues, including reporting. These events will help get you started.

ECI MAX AP

None

ECI MAX AR

Event: Customer Status Change. Whenever the customer status changes, this event sends an email containing the customer's name, status (i.e., release or hold), status and the sales representatives assigned to the customer in the customer master table.

ECI MAX Inventory

Event: Inventory: Qty On-Hand < Safety Stock. Whenever the Part Master Nettable Quantity on Hand is less than the Safety Stock, this event sends an email containing Part ID, Description, Quantity On-hand, and Safety Stock Value to the assigned user.

Event: Parts Rel to Production Today. Whenever a new Part Master record is created (i.e., the Production Date = System Date), an email is sent to the appropriate users with information about that part.

ECI MAX Labor

None

ECI MAX Orders

Event: Customers: No Orders in 30 Days. This event analyzes all sales orders in the past 30 days for all customers in the Customer Master table and then lists those that have a count equal to zero. An email is sent listing the Customer ID, Name, Contact and Phone Number.

Event: Orders: Today's Total Value > \$10,000. This event reports when the daily sales exceeded the user defined objective (e.g., \$10,000). An email is sent to the user (i.e., Sales Manager) showing the total for the day.

¹ Contents of ECI_KS_MAX_V10.epk in December 2020. These are free events. Please ask for them with your KSAA purchase.

ECI MAX Purchasing

Event: PO: Due Within Next 7 Days. This event delivers a pre-expedite report to buyers showing all open purchase order lines that are expected to be received in the next 7 days. An email is sent to the buyer showing the Order Number, Vendor ID, Part ID, Quantity, and the number of days until the due date.

Event: PO: Receipts Overdue. This event shows all open purchase order lines that have due quantities greater than zero and due dates less than the system date. An email is sent to the buyer showing the Order Number, Vendor ID, Part ID, Quantity, and the Current Due Date.

ECI MAX Service

None

ECI MAX Shipping

Event: Shipments: Due to Ship in 7 Days. This event delivers a pre-expedite report to the appropriate users showing all open sales order lines that are expected to be shipped in the next 7 days. An email is sent to the user (i.e., shipper, planner, production manager) showing the Customer ID, Order Number, Part ID, Current and Due Quantities, Customer and Current Due Dates and the Sales Rep for the order.

Event: Shipments: Ship Qty <> Inv Qty. This event shows any line that was shipped partial (i.e., the shipped quantity was less than the due quantity). An email is sent to the user (i.e., shipper, planner, production manager) showing the Customer ID, Order Number, Part ID, Current and Due Quantities, Customer and Current Due Dates and the Sales Rep for the order.

Event: Shipments: Yesterday's. This event shows all sales order line items that were shipped yesterday. An email is sent to the user (i.e., shipper, planner, production manager) showing the Customer ID, Order Number, Part ID, Current and Due Quantities, Customer and Current Due Dates and the Sales Rep for the order.

ECI MAX Shop Floor

Event: Jobs: Actual Labor > Std by > 10%. This event reports any master scheduled and manufactured order sequence where the sum of the actual runtime is greater than the expected run time for that job progress record. The event sends an email containing the shop order number, sequence, work center, status, and the sequence queue code.

Event: Jobs: Closed Today. This event reports all master scheduled and manufactured orders that were completed using the Post Order Close process today. It uses the Order Master Closed Date which is the date that the order becomes a status 5, closed by accounting. An email is sent to the user (i.e., planner, production manager) showing the Order Number, Part ID, Description, Current and Due Quantities and Current Due Date.

Event: Jobs: Completed Today. This event reports all master scheduled and manufactured orders that were completed from work in process today. It uses the receipt to stock on status 4 shop orders. An email is sent to the user (i.e., planner, production manager) showing the Order Number, Part ID, Description, Current and Due Quantities and Current Due Date.

Event: Jobs: Created Today. This event reports any master scheduled and manufactured orders that were created today. An email is sent to the user (i.e., planner, production manager) showing the Order Number, Part ID, Description, Current and Due Quantities and Current Due Date.

Event: Jobs: Sequence Behind Schedule. This event reports any sequences on master scheduled and manufactured orders where the sequence current completion date is less than the system date for non-

completed sequences. An email is sent to the user (i.e., planner, production manager) showing the Order Number, Sequence, Description, Part ID, Completion Date and Status.

Event: Jobs: Status Change. This event provides a notification whenever the order status changes master scheduled and manufactured orders. The event sends an email containing the shop order number, sequence, work center, status, and former status.

Support

Support for MAX KSAA Event programming can be obtained from:



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