



## Introduction to MAX ERP

MAX Expansion Modules, Tools, Utilities & Reports

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## MAX Introduction - Expansion Walkthrough

MAX is a self-contained, fully functional ERP system that overall, is very flexible in its ability to be configured for different needs in user organizations. At the same time, different organizations are unique and require software to help manage those situations.

The success of the MAX brand is, to a certain extent, due to our ability to listen to our user base. Users are “in the trenches” and facing the reality of adapting standard software to local situations. While ERP team leaders, as well as, our internal sales, technical support teams and professional services consultants, are often quick to say that a solution is not possible; many times, it is. In some cases, it has already been done, but not adequately communicated.

MAX users can choose from many bolt-on applications from across all enterprise needs like Engineering, Customers, Scheduling, Production Management, Materials Management, Executive Finance, Information Technology and Data & Reporting. We have modules, tools and utilities that span across the entire organization.

This document is an attempt to capture all current partner developed modules, tools, and utilities.

## ERP Developer Community

Even with the Enterprise bundle for MAX in place, you still could increase the power and utility that you get from MAX by deploying partner productivity enhancers and integrated solutions.

As an established ERP package in the SME marketplace, MAX has a network of dedicated and loyal developer organizations that are constantly looking for unique opportunities to make MAX more functional and efficient. We have partnered with the best to bring integrated solutions across every aspect of the MAX ERP product.

## About ECI Software Solutions

For more than 30 years, ECI has helped thousands of companies compete and grow with integrated ERP business management software, technology solutions, e-commerce, and services for independent companies. We help small and medium-sized enterprises (SME) compete and grow by providing industry expertise and purpose-built solutions that make doing business easier.

If you have any questions about the products and services that MAX offers, please contact your MAX Account Manager.

## Attend a FREE MAX Webinar

Choosing a well-designed and purposeful Partner Product does not have to be a daunting task. We provide “live” online demonstrations that are designed to provide an introductory look at our partner products. Please contact us for a schedule of events.

## MAX Professional Services



Along with these expansion modules, tools and utilities is a group of dedicated professionals that deeply understand software integration and the very operational issues these applications were developed to resolve. You will not be left alone in keeping these applications operating efficiently and effectively for your organization.

Our Professional Services team can help you navigate through these applications and help assure a successful implementation.

## Request for Custom Software

Cannot find the solution to your problem in the list below? Have a unique business challenge that you would like to solve with MAX, but don't already see it in our list of expansion capabilities? Not a problem.

This list is a snapshot in time as our expansion modules, tools and utilities change every week. There is a good chance that our custom developers are already working on a similar need for another customer. If not, our solutions team can build something to your exact specifications. We would love to discuss your unique situation and explore solution possibilities.

Contact your Account Manager to discuss your needs and learn how we will design the custom tool to get the job done right.

## Software Versions

All applications listed in this document have been approved for use with the latest MAX version. At the time of this publication, that was MAX v5.6.1. Generally speaking, modules, tools, utilities, and reports will operate on MAX v5.5.6 to the current release.<sup>1</sup> Versions of Microsoft Server and Microsoft SQL Server are also restricted.

Please check system requirements with the Partner Provider prior to purchasing.

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<sup>1</sup> MAX v5.5.6 is the lowest recommended level of operation.

With these partner products, you get a full library of expansion capabilities made for MAX to meet the needs of growing manufacturers. Many of these applications were requested by MAX users, developed, and then made available to the market as a “custom repeatable solution.”

This document is organized into departments or areas of operation, which may be visualized in the following MAX ERP Overview diagram.

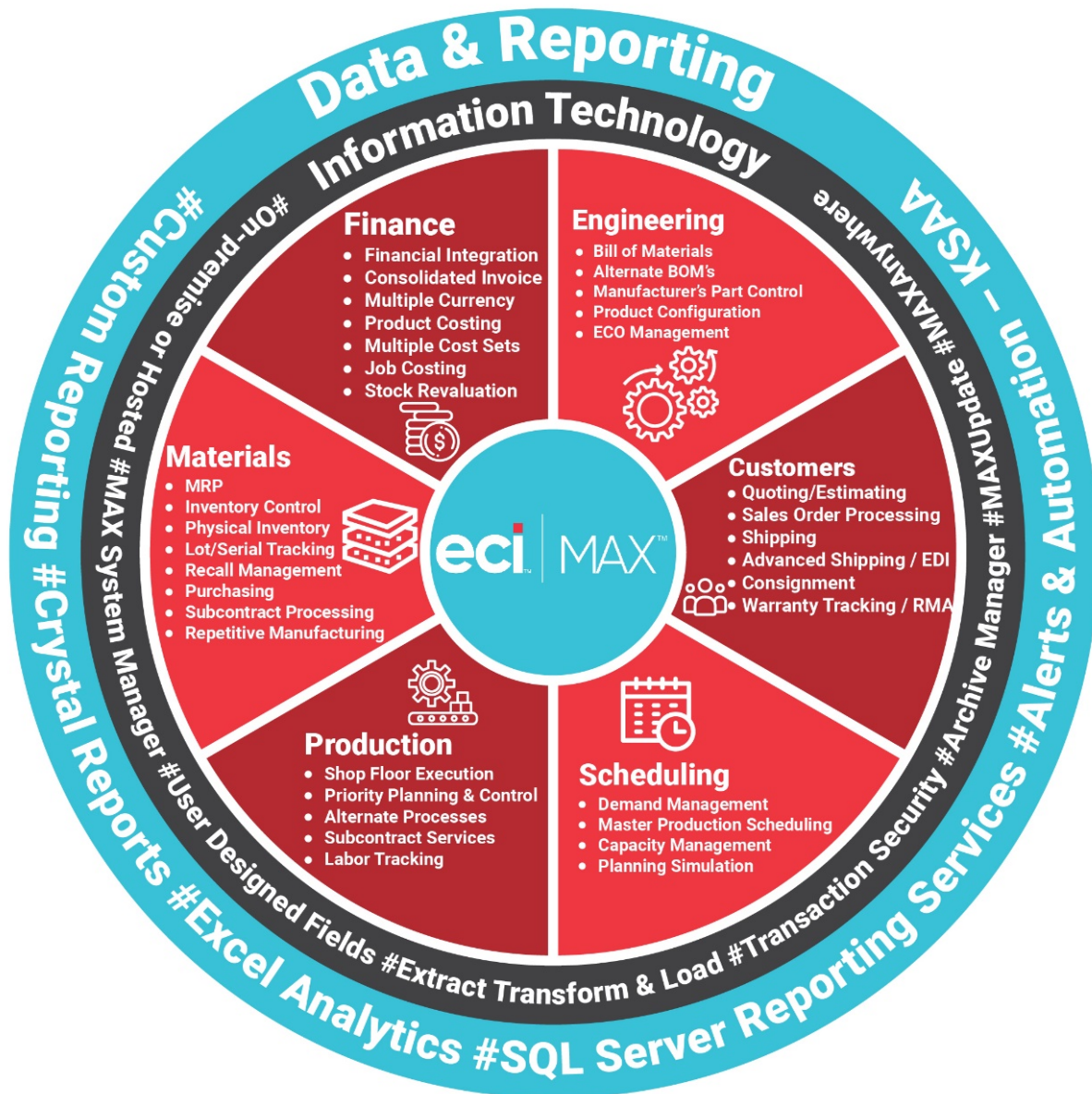


Figure1. MAX ERP Overview

All modules, utilities and tools are grouped into these areas so that you can evaluate their need in terms of your organization. The following list is a summary by area. Each of the sections and products will be summarized so that you have an indication of its purpose.

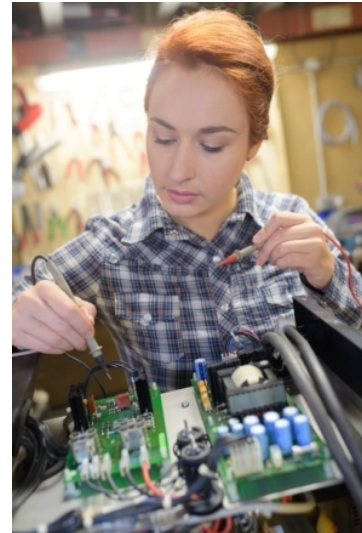
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- Convert Configured Order



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- Quote Discounter
- Web XML Connector
- Customer Based Pricing
- Customer Inquiry
- Close Sales Orders
- MAX Packing List
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It is sometimes difficult to determine the best area to include a solution. For example, is quality a materials, production, or background process? Because organizations are organized in different ways, there are different answers to that question. For that reason, please scan the entire document when looking for a specific solution. This is especially true when it comes to reports. We also recommend that you use <Ctrl><F> to search and find key words.

## MAX Additional Resources

In addition to this document, please understand that the following resources are available to help you.

### MAX Enterprise Modules

If it were a snake, it would have bitten you! See our Introduction to MAX ERP brochure for a complete listing of the internal modules found within the MAX ERP System. We often find user organizations that require specific functionality only to find that they have the module, but never implemented it!

### See Our Partner Products in Action!

Contact your Account Manager to schedule a personal demonstration with one of our Partner Product Specialists to see these modules, tools, utilities, and reports in action and find out why so any manufacturing pros have come to rely on MAX over the years.

# Background (General)

Background concerns are represented by the “MAX’ in the center of the ERP Overview Model. Solutions found here either do not fit directly into one area or may be used across the entire MAX system.

## Synergy for MAX – Workflow Process Management

**Partner Provider:** Exact Software

Synergy is referred to as “business process” software as it concentrates on automating your standard business processes. It is aimed at the front office of your organization.

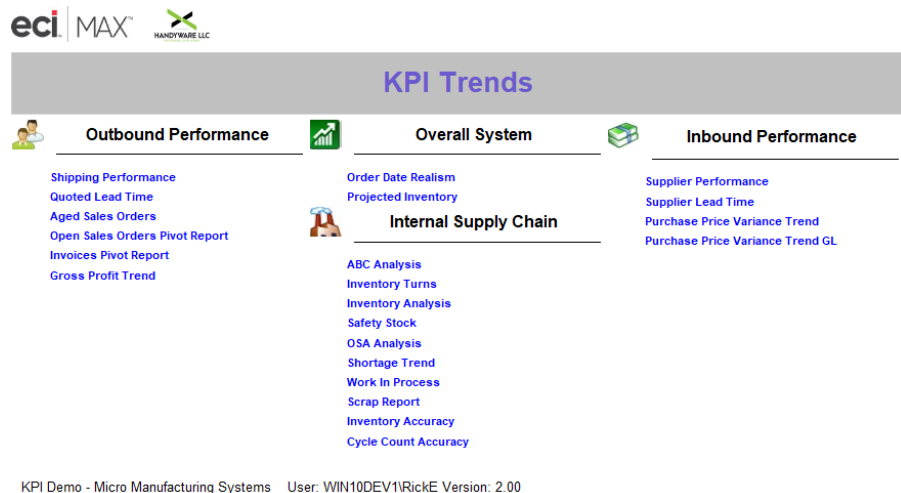
Any business process within your organization can be established in Synergy. Employees requesting vacation days, customers wanting to return parts and requesting a Return Material Authorization (RMA), your Customer Relationship Management (CRM) and your Quality Management system are examples of business process flows that can be managed in Synergy. These are not “canned” flows, however. You purchase Synergy as a platform, and you develop your own business flows.

MAX Enterprise is a suite of four pre-canned business process flows that are a great starting point for most MAX organizations: CRM, Service, Quality and Human Resources.<sup>1</sup>

## Key Performance Indicators – Trends

**Partner Provider:** HandyWare, LLC

KPI Trends is a SQL Server Reporting Services (SSRS) based application that collects relevant MAX data, processes that data and displays it as information in a manner that illustrates; 1) your current condition for that metric and for most metrics 2) how that metric is trending. Current conditions, combined with management objectives, can then set the proper course of action for improvement.



By design, the metrics included in this package are tactical in nature and depend on many operational processes and controls. While the relative importance and priority of each will vary from organization to organization, all of them focus on improving the overall value of the business and support management objectives.

Twenty-one KPI metrics four supply chain areas are currently available including:

- Overall System: Order Date Realism and Projected Inventory.

<sup>1</sup> For Synergy – CRM see “Customers” section and for Synergy – Quality see the “Production” section.



- Outbound Performance: Shipping Performance, Quoted Lead-time, Aged Sales Orders, Open Sales Orders Pivot Report, Invoices Pivot Report and Gross Profit Trend.
- Internal Supply Chain Metrics: ABC Analysis, Inventory Turns, Inventory Analysis, Safety Stock, OSA Analysis, Shortage Trend, Work in Process, Scrap Report, Inventory Accuracy and Cycle Count Accuracy.
- Inbound Performance Metrics: Supplier Performance, Supplier Lead-time, and Purchase Price Variance Analysis.

Simultaneously managing metrics across the organization has proven to be more effective than the “metric of the month” approach. Use these tools to drive inter-department collaboration that increases business value.

## Background (General) Summary

There are some solutions that apply across the organization. For the purpose of organizing and communicating these offers, we group them in the center of the ERP Overview model and refer to them as “background” or “general’ applications.

Please see the Data & Reporting section below for general reports written in Crystal, Excel, and SQL Server Reporting Services (SSRS) to meet your requirements.

# Engineering

The engineering function represents the most significant processes that determine your internal supply chain. The bottom line is that the structure of the bills of material and corresponding part routings for manufactured parts must match the production process flow through the plant. Having the right part numbers, at the proper bill of material level will either facilitate that flow or cause problems and workarounds.

Solutions in this area provide help in integrating, analyzing, and processing engineering data to increase the efficiency of the Engineering Department.

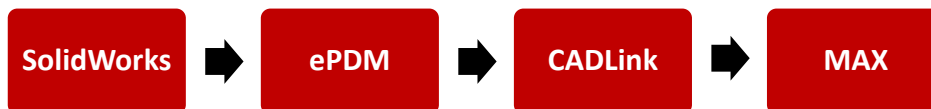
## Engineering

- CADLink – SolidWorks to MAX
- SolidWorks to MAX - Excel
- Part Cloner
- Part Clone Utility
- Handy Part Cloner
- BOM Analyzer
- BOM Manager
- Print Drawings
- Convert Configured Order

## CADLink – SolidWorks to MAX Integration

**Partner Provider:** QBuild Software

Engineering models, in the form of SolidWorks Three Dimensional (3D) models have been around for a long time now. What has been missing is the capability to translate the 3D model into data that can be used electronically with an ERP system. With the creation of QBuild’s CADLink interface, those engineering models can now be translated into ERP data.



Part master and bills of material can be read from the engineering data and “pushed” into MAX. Standard part routings may also be created in the interface and used to update MAX. With the real-time, two-way link between your SolidWorks engineering design and your MAX system, you will break down barriers between engineering and production.

## SolidWorks to MAX – Excel Integration

**Partner Provider:** Handy Ware, LLC

Read the SolidWorks Product Data Management (PDM) export file and display BOM in a Microsoft Excel spreadsheet. Based upon data quality either update SolidWorks PDM data, or spreadsheet data. When data is ready (i.e., accurate), load it into MAX.

## Part Cloner

**Partner Provider:** Balance Point Technologies

A complicated part with many attributes could take up to an hour to create. MAX Part Cloner uses existing parts as templates for new part creation. Similar parts can be created with just a few clicks. You will save keystrokes, ensure consistency, and reduce errors. Accurately and consistently create new part records in minutes.

Part Cloner provides the ability to clone all the data from an existing part including: Part Notes, Product Structure, Part Sales, Price Breaks, BOM Notes, Routing, Routing Notes, Part Vendor and Manufacturers Parts. This tool can save a lot of time when creating new parts which are like existing parts. For Bills of material, you can selectively copy the source part BOM and exclude, add, or change components as needed. Likewise, you may choose to copy routing from the source part and select/change operations.

## **Part Clone Utility**

**Partner Provider:** S.I.M Consultores S.A.S

This version of the Part Clone utility will allow you to clone part master, part master notes, bills of material and BOM notes, part routing and routing notes and part sales information to a new part number from an existing part.

## **Handy Part Cloner**

**Partner Provider:** Handy Ware, LLC

Handy Part Cloner is a lighter version of Part Cloner, where some of the advanced features are not needed. For example, this product only clones a part, and it is Bill of Materials.

## **BOM Analyzer**

**Partner Provider:** Balance Point Technologies

The BOM Analyzer provides an easy way to explode multi-level bills of material from a list of parts and quantities into a flat file for easy reporting. The data is extracted into a single MS Access table.

## **BOM Manager**

**Partner Provider:** Balance Point Technologies

The BOM Manager is designed to provide an intuitive interface for BOM entry and change management. The module allows the user to manage engineering changes by creating events and then, group multiple database tables (i.e., parts, BOMs and routings) and event details (i.e., replacements, adds, changes and deletions) in a single event. This allows for easy management should details change, or even be cancelled, prior to processing.

There are built in where used functions to help manage the impact of component part changes. It also contains conflict checking and notification if change conflicts with an already scheduled future replacement. Future changes will be blocked until conflict is resolved. It uses effective dates to manage a complex BOM change and is particularly useful in the following situations:

- Implementation date is not fixed.
- BOM changes may get cancelled.
- Quantities per may be estimates.
- Multiple BOMs or levels of a BOM are affected by related changes.

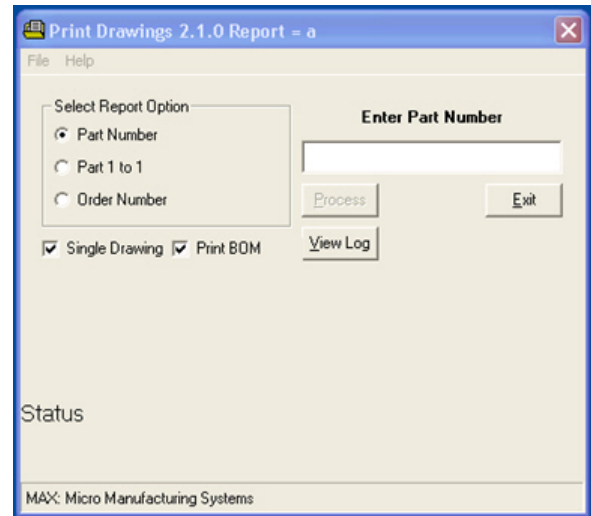
Related BOM changes are combined using a unique event ID which can be easily applied and cancelled after being applied. Email alerts of pending events can be sent, and event summaries can be printed.

## Print Drawings

**Partner Provider:** HandyWare, LLC

The print drawings application is designed to print Adobe (PDF) drawings for Single Drawings, single level parts and orders, and multiple level parts and orders. Drawings may be any type of data for the part (i.e., engineering drawings, certificates of compliance, etc.). While this application assumes only one drawing per part, drawings may also hold multiple types of data. The entire contents of the PDF will be printed.

The application will look up parts in the Part Master table and use either the engineering drawing number field, the engineering drawing filename field, or the part number as the drawing number. Drawing numbers do not have to have application paths, as the application will insert the standard path if one does not exist. Drawing numbers do not have to have “PDF” as extensions as the application will insert it if it is missing. Engineering drawings must exist in a single user defined data folder. Multiple sub-folders and levels of sub-folders are allowed.



## Convert Configured Order

**Partner Provider:** HandyWare, LLC

Many users of the MAX Feature Options Configurator module enjoy its “SHIP from WIP” orientation where the configured assembly is moved to the shipping area and shipped immediately. While this works well in most Assemble-To-Order (ATO) environments, it fails when the configured units are to be stored for a prolonged period in either local or dealer stock.

In these situations, managing stored units via open master scheduled orders is not efficient. The Convert Configured Order application resolves the stocking problem by performing the following tasks immediately after a configured order is entered. The application reads the configuration string from a configured sales order, then:

- Creates a unique Part Identifier in the Part Master and Part Sales tables.
- Creates a standard bill of material for that unique Part Identifier from the configured string (i.e., actual options chosen on the order).
- Clones the family part routing to the unique Part Identifier.
- Performs a cost roll-up on the new assembly to provide a standard cost.
- Cancels the master scheduled order tied to the original configured sales order.
- Clones the original configurator sales order to the next delivery number, using the unique Part Identifier.
- Cancels the original configurator sales order.

With the Smart Renaming option enabled, and configurator tools provided, complicated family parts can be cloned, then set up using Excel, and loaded into the Configurator tables quickly. Later, as orders are taken, the configured parts on the order can be converted to normal parts, with unique, reusable names. This way, the more popular configurations can be set up as stocked items, with their own unique part number.

## Engineering Summary

The Bill of materials module holds all the part and structure information about the flow of materials through your plant. This data, along with the part routing, which is in the Shop Floor Execution module, forms the foundation for planning, transacting, and accounting information. This critically important information is a main building block of the Material Requirements Planning (MRP) system. A high degree of accuracy is required for successful operation and any tool to simplify the process and make it more efficient is desirable.

For individual reports based upon modules found in this Engineering area see Data & Reporting. Reports are available in Crystal, Excel, and SQL Server Reporting Services (SSRS) to meet your requirements.

# Customers

Servicing customers and managing demand are important parts to Customer facing departments. Solutions in this area range from CRM, quoting and automated order entry to shipping and labeling, and coordinating all data between sales orders, packing lists and invoices.

## Synergy for MAX – Customer Relationship Management

**Partner Provider:** Exact Software

Integrate Customer Relationship Management (CRM) with ERP to achieve a far more complete understanding of your business. The right CRM solution puts actionable customer and prospect information into the hands of the right people at the right time, allowing you to take advantage of new opportunities and ensure your sales and marketing efforts are optimized.

Taking the CRM+ERP equation to the next level, Synergy for MAX incorporates several core data elements already in MAX, including customers, suppliers, items, ship history, sales orders, quotes and more to ensure your customer service and sales teams can quickly and accurately capture, store, and use critical information about your customers and store those details in a central database instead of spreadsheets or emails owned by different departments.

## Zoho Customer Relationship Management

**Partner Provider:** HandyWare, LLC

Build everlasting customer relationships and convert more leads, engage more with customers, and grow your revenue. Zoho, a Customer Relationship Management (CRM) program was built for small business, thus it made sense to interface it with MAX ERP. Customer facing work performed in Zoho may be shared with MAX is electronically synchronized with this integration. Customer account files are shared, orders are electronically transferred, and returns may be processed.

HandyWare, LLC has a library of custom integration utilities to integrate with Zoho.

## Request for Quote

**Partner Provider:** Balance Point Technologies

This application streamlines the Request for Quote (RFQ) process by automatically generating RFQs from Quotes, BOMs, Planned Orders and MAX Part Vendor Data. This new tool will help you keep your costs current, get the best prices from your suppliers, and select the right vendor for the job, while reducing your purchasing time and effort.

### Customers

- Synergy for MAX - CRM
- Zoho CRM Interface
- Request for Quote
- Quote Discounter
- Web XML Connector
- Customer Based Pricing
- Customer Inquiry
- Close Sales Orders
- MAX Packing List
- Lean Tools – Consolidated Planning/Picking
- MAX Data Collection – Shipping
- Small Package Shipping
- Handy Labels
- Document Manager
- MAX Sales Order Maintenance

## Quote Discounter

Partner Provider: HandyWare, LLC

MAX has several ways of allowing discounting of quotes, but this tool allows a quick method of discounting that conforms to the statement “quick—act now and take 10% off, and if buy it today, we will take of another 5%.” All math is performed, and the quote can be sent, while the customer is still on the line.

## Web XML Connector

Partner Provider: Balance Point Technologies

The Web XML Connector is not really a user module, but rather an interface. The purpose of the connector is to bridge your web-based store to the Sales Order Processing module by transferring external customers and sales orders.<sup>1</sup> The Web Connector works very well for standard parts that are part of a make to stock environment. A service parts inventory for example, could be linked to a self-service web store to allow customers to locate and purchase spare parts through a web browser. As orders are entered, credit card information is processed, and the customers are billed as items are shipped. This eases the load on manual sales order entry by allowing the customers to perform their own order entry.

This utility uses the standard MAX ETL schema for customers and sales orders but will fill in missing data elements so that orders or quotes can be loaded from a bare minimum of data. This utility can be set up with standard defaults for: Customer ID, Sales and COGS accounts, Terms, Ship Via, and Currency.

## Customer Based Pricing

Partner Provider: Balance Point Technologies

Your sales order processing staff should not be hindered by having to look up specific prices for customers and parts; MAX should provide an accurate price from the customer, part and quantity data entered during order entry. Customer Based Pricing allows the MAX user to set up and assign Customer Types in Excel and then assign Customers by MAX Customer ID to those types. Customer Based Pricing then updates MAX data with new list prices and discounts by customer type.

## Customer Inquiry

Partner Provider: Balance Point Technologies

Search your MAX or Consignment data using a variety of criteria. You also have four selection operators to customize, narrow, or expand your search (None, Equals, Starts With, and Contains). This is very helpful in finding a specific customer or identifying customer groups.

## Close Sales Orders

Partner Provider: S.I.M Consultores S.A.S

The purpose of this utility is to be able to close sales orders from a single screen. This Utility will allow user to close any sales orders to status 4 from an open status 3 providing that they do not have shipped quantities still pending for posting. A warning message will be provided if shipped and not invoiced.

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<sup>1</sup> Must be customized to link specific web store to MAX, thus custom development time is sold with the product.

## **MAX Packing List**

**Partner Provider:** Balance Point Technologies

MAX Packing List allows for multiple packing lists to be created before an invoice is posted. This allows for shipments that may be going both express and standard.

## **Lean Tools**

**Partner Provider:** Balance Point Technologies

### ***Consolidated Planning/Picking***

Consolidated planning and picking allows for grouping of work orders by a variety of categories such as customer, product line, project etc. Grouping can be defined using a mix of parameters including commodity code, planner, and buyer codes. The ship schedule can be reviewed and modified in place before committing it to do what if shortage analysis. Orders can be approved and or released easily from a grid. This allows for order picking, packing, and shipping to be done in waves.

## **MAX Data Collection Module – Shipping**

**Partner Provider:** Balance Point Technologies

The Shipping module allows for Sales Order Shipping with Stare and Compare logic to verify actual staged product against shipping documentation. Total integration of MAX with bar code data collection capabilities gives you optimal control of collecting and processing transactions on a timely basis with real-time validation against the MAX database using either fixed mount or radio frequency (RF) devices.

Note: Data Collection for MAX supports five different areas, including Customer (shipping), Production (shop floor, labor, and time & attendance) and Materials (inventory) areas. See each option in those areas in this document.

## **Package Shipping**

**Partner Provider:** Balance Point Technologies

The Package Shipping module is to organizations shipping via United Parcel Service (UPS) and Federal Express (FedEx) as the Advanced Shipping module is to those shipping commercial carrier. The purpose of the module is to pull sales data from MAX to the shipping software and then push collected shipping data (i.e., freight costs, ship methods and dates) back to MAX. The latter flow automates the updating of freight on the shipped order. It also transfers the unique tracking number to the MAX database where it can be used on packing lists and invoices. This eliminates a human step to update the MAX sales order shipment with shipping data.

The module interfaces with the scales and labeling systems provided by these shipping services. The sales order number is entered into the shipping system and the shipping address information from the MAX sales order populates the screen. When the carton is placed on the scale the system calculates the shipping costs from this data, assigns a tracking number, and prints the shipping label. The end of day process, which already occurs in the shipping software, is then written back to a custom MAX table for use on MAX forms and reports.



## Handy Labels

**Partner Provider:** HandyWare, LLC

This application makes it effortless to print shipping labels. Enter a MAX Sales Order Number and press Load and the grid will populate with all lines on the sales order. The quantity due will be shown but may be changed. The application can print up to three Crystal Reports (labels) for each line processed. Sample labels are provided. You may use you existing label with minor modifications. A log file of all labels created is generated: what order, what date, who, how many, etc.

## Document Manager

**Partner Provider:** Balance Point Technologies

Document Manager automates communications with customers allowing for overhead reduction and provides opportunities for improved customer service and accelerated cash receipts. It allows users the ability to configure batch processing of emailed, or snail mailed, sales orders, packing lists and invoices for distribution to customers.

With Document Manager, users can set up multiple recipients for each customer and select which sales documents each recipient is to receive. They can format separate email messages for the invoice and the sales order. Then at the end of the day or periodically throughout the day they can batch email the documents. A history of sent documents is maintained so documents can be easily resent, if needed. Paper documents can be printed for customers not receiving emailed documents.

## MAX Sales Order Maintenance

**Partner Provider:** S.I.M Consultores S.A.S

MAX Sales Order Maintenance allows you copy a sales order or a quote to a new sales order or copy an invoice to a new credit memo.

The credit memo function provides an easy method to reverse invoicing errors or generate the credit memo due to a customer return without having to rekey all the information all over again. Reason codes may be assigned to the newly created credit memo so you may track the source.

The utility also provides an option to generate a new sales order, just in case the item being credited is to be reshipped.

## Customers Summary

Setting customer expectations and making and holding customer promises is critical to the success of your business. This process begins in the quoting/estimating process and continues through to the customer invoice. MAX customer facing modules, tools and utilities help you manage those processes.

For individual reports based upon modules found in this Customer area see Data & Reporting. Reports are available in Crystal, Excel, and SQL Server Reporting Services (SSRS) to meet your requirements.

Ship To:  
Exact Software  
777 Mariners Blvd  
San Mateo, CA 94404  
USA  
Purchase Order:

Sales Order: 20000002 Line: 01 Delivery: 01  
Part ID: 1000  
Description: Computer



Box Count: 10 Quantity: 1.00

Label: 1 of 2

COMMENT 1

COMMENT2

# Scheduling

The quality of your schedule is one of the most important criteria for success with your ERP application. Schedules must cover your cumulative manufacturing lead-times, be realistic with respect to capacity and stable (i.e., you cannot keep changing your mind in the short term). Not managing any one of these factors will increase the cost of operations. It seems logical then that we find solutions to help those difficult processes.

## Advanced Forecast

**Partner Provider:** Balance Point Technologies

Advanced Forecast provides a flexible, easy-to-use method for maintaining forecasts and represents a huge timesaver for companies that rely on forecasts for planning.

Your Advanced Forecast spreadsheet starts with previous sales, existing or anticipated orders, any forecasting component needed to provide the financial and operations guidance you need. Load Forecast Orders from multiple spreadsheets for different product lines or responsibilities, for specific customers or aggregate product codes. Replace current forecasts or close past due forecasts for historical reporting.

The most significant benefit from running this module is its ability to handle forecast consumption. Consumption refers to the decision logic used when sales orders and forecasts exist in the same period for the part. Advanced forecast is the best method in the market for managing forecast consumption by netting sales orders and shipments against the forecast amount.

## Handy Forecast Worksheet

**Partner Provider:** HandyWare, LLC

Forecast orders are often used as a tactic to drive MRP planned data beyond the lead-time of customer orders. Handy Forecast Worksheet is part analytics and part reporting. The analytical part summarizes data by part and provides annual quantities shipped for the past five years, current year to date sales, current inventory status and forecast, sales, and requirement data for both year to date and future periods. This data can then be used to derive a future forecast that can be loaded into the system.

Once entered, forecasts need to be maintained. One option is to remove all existing forecasts and then load an entirely new forecast. Removing and reloading forecasts keeps them accurate and relevant, especially with respect to due dates. This also avoids the consumption issue.

### Scheduling

- Advanced Forecast
- Handy Forecast Worksheet
- Capacity Planning
- Work Order Generator
- MRP Simulator Function
- Handy Consolidated BOM
- Handy MRP
- Handy Production Schedule
- Visual Scheduler

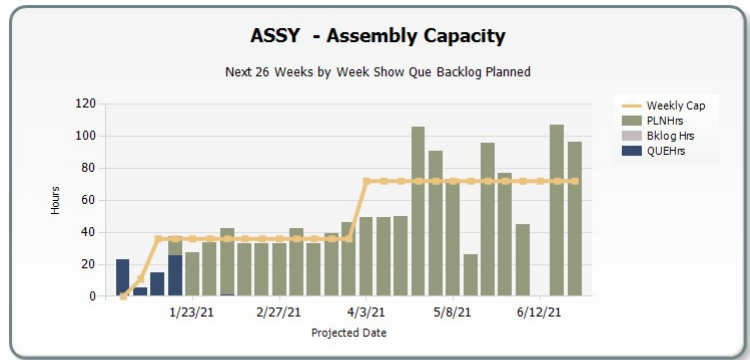
## Capacity Planning

**Partner Provider:** HandyWare, LLC

Capacity Planning was designed by experienced operations managers with real scheduling experience using industry standard fundamental principles and processes.

This tool performs rough-cut capacity planning and management, by setting the supply of capacity for each critical work center over time and reporting the demand for capacity derived from your material schedules against those levels. Information derived; directly communicates how well you are using your ERP solution to schedule your production function. This is required to effectively operate the MAX ERP infinite capacity planning system.

At the shop floor level, this tool clearly shows order priority so that schedules may be precisely executed. It can serve real-time reports to work center monitors.



User:WIN10DEV1\RickE Report Run:12/30/2020 07:46 Page 1 of 1

V2.10

## Work Order Generator

**Partner Provider:** Balance Point Technologies

Work order Generator enables users to convert a sales order directly into a shop or master scheduled order by displaying manufactured items on your sales order and immediately create shop orders for the selected items.

For regular parts or processes, shop orders may be created immediately from sales orders, and then released so that work order documents may be printed. In some environments this functionality gets work started quicker. Configured parts are supported. In general, this saves processing time and steps and shortens delivery time for manufactured products.

## MRP Simulator Function

**Partner Provider:** Balance Point Technologies

Run a simulated MRP using sales orders and forecasts as demand and fully exploding all component requirements. The application will extract and update an Access database with the summarized data for easy reporting.

## Handy Consolidated BOM Planner

**Partner Provider:** HandyWare, LLC

With the Handy Consolidated BOM Planner you can quickly and accurately summarized multiple level BOM's for single and multiple parts and quantities and store results in a data table that can be used for additional analysis. The main benefit of this application is that it will consolidate (flatten) a multiple level BOM to a single level containing all parts used with the quantity per part as the total of each part, even if used at multiple levels. It also generates a list of parts that were not used in the consolidation (i.e., records with BOM Type "E", engineering, "R", Resource, and "P", Planning, as well as relationships with zero or negative quantities).

From these outputs, numerous reports may be written from the data. For example, use quantity on hand data, open requirements and scheduled receipt information and perform a mini-MRP for a specific product. A starting Crystal Report is provided.

## Handy MRP

**Partner Provider:** HandyWare, LLC

Handy MRP produces a custom MRP command line process and controls the execution of all steps in the Explosion (i.e., Recalculate Low Level Codes, Batch MS Orders, Regen, MRP Explosion and Reschedule Order Routings). Why use a partner product for MRP? Consider the following:

- Closing quotes, sales orders, master scheduled and manufactured orders, and purchase and subcontract orders where the line is open for a zero due quantity.
- Updating header status codes to that of the minimum detailed line.
- Deleting orphan quote, sales order and purchase detailed records with no headers.
- Updating the requirements detail record with the status of the order master.
- It allows for the MRP Explosion to be performed in two passes, one for manufactured parts followed by one for purchased parts with a different “consider as initial supply” selection.
- The application provides direct feedback on if the process completes successfully and why.
  - It aborts if a BOM loop or dates outside of the acceptable range are found.
  - The process crashes.
- Reports total time for each step of the process.

HandyMRP 1.06

Login MRP Setup Info

Perform Status Cleanup

Recalculate Low Level Codes

Batch MS Option Default

Regen Option Recalc

**MRP Pass 1**

Consider as Initial Supply

Exclude Types B,D,Y

MRP Exp 1 Rounding None  Enable Horizon Range 2/21/2021 to 2/21/2021

**MRP Pass 2**

Consider as Initial Supply

Include Only Types B,D,Y

MRP Exp 2 Rounding None  Enable Horizon Range 2/21/2021 to 2/21/2021

Reschedule Order Routings

Run

MAX Company: MAX Planning Status: Waiting

Even if you do not need a multi-pass MRP, this product offers significantly better data maintenance and error reporting. This way you can feel confident, before you start working on the results, that your data is accurate.

## Handy Production Schedule

**Partner Provider:** HandyWare, LLC

Handy Production Schedule serves work center or shipping queue reports to area monitors showing current work activity in efforts to provide updated priorities and eliminate paper.

## Visual Scheduler

**Partner Provider:** Balance Point Technologies

Eliminate manual production planning with MAX Visual Shop Scheduler. Without leaving the ERP environment, your planners and schedulers will be able to more accurately evaluate and apply real-world work center conditions to balance production limitations with customer demand for product.

## Scheduling Summary

Creating a realistic and stable schedule that meets all expected demand is a “cheap” secret to successfully managing your business. MAX ERP provides the tools to properly capture and schedule independent demand so that the power of MRP can plan the rest. Under the watchful eye of your planners, that schedule can be balanced with your capacity to maximize successful completion.

For individual reports based upon modules found in this Scheduling area see Data & Reporting. Reports are available in Crystal, Excel, and SQL Server Reporting Services (SSRS) to meet your requirements.

# Production

The production function is tasked with executing the schedule in a way that utilizes resources, operates efficiently and with minimum rework and scrap (i.e., do it right the first time). Production must also provide the necessary feedback from the shop floor to keep plans valid and schedules updated.

It should not be a surprise to see solutions in this area that help communicate production needs to the floor and make it efficient to report data, often in a real-time and online mode.

## Synergy for MAX – Quality & Compliance Management

**Partner Provider:** Exact Software

Synergy for MAX provides a standardized, comprehensive workflow engine that lets you define your business rules, enabling you to track and automate manual and hidden processes from a secure, centralized portal.

With the ability to track all defects, non-conformance and corrective action processes and implement structured version control and document approval processes, you will rest easy knowing all your critical documents are organized, protected and readily available.

Whether you are operating in a regulated environment or working to achieve or maintain ISO certification, MAX and Synergy combine to present a powerful solution that will have you ready for your next audit.

## uniPoint Enterprise Quality Management

**Partner Provider:** Various

The unipoint suite of Quality and Continual Improvement modules are designed to help your company automate its journey toward excellence. Core modules include: Nonconformance, Corrective/Preventative Action, Tools & Equipment Management, Document Control, Customer Service, Inspection and more.

## ShopPaper

**Partner Provider:** Balance Point Technologies

Need to ensure correct equipment set up? ShopPaper provides a method for printing multiple Crystal Reports and other documents such as drawings, instructions etc. based on MAX part associated entries.

Shop Paper is the control center for creating the shop packet that production requires for every shop order. Once the shop order is released, the shop packet must be efficiently produced to minimize overhead and delays on the floor. Due to the volume of shop orders, any small-time savings here is quickly multiplied into large production gains.

### Production

- Synergy for MAX – Quality & Compliance Management
- uniPoint Enterprise Quality Management
- ShopPaper
- HandyWare Print Sort Drawings
- Pick Pro
- MAX Data Collection Module – Shop Floor
- MAX Data Collection Module – Labor
- MAX Data Collection Module – Labor Manager
- Lean Tools
  - Back Flush by Operation
  - Lean Tools – Supplier Kanban

This utility provides the ability to combine MAX Shop Paperwork (i.e., order pick lists and routings) with other types of supporting documentation such as part labels and drawings for each part on the pick list, setup instructions for specific routing sequences, etc. Documents may be in multiple file formats like crystal reports, office word/excel files, SQL Server Reporting Services (SSRS), Adobe PDF and SolidWorks drawing files (requires eDrawing viewer). Different sized documents may be sent to multiple printers.

## HandyWare Print Sort Drawings

**Partner Provider:** HandyWare, LLC

Print Sort Drawings provides the ability to print all Adobe PDF formatted drawings and text files that have been associated to parts in MAX single batch print. SSRS reports can be printed based on the selected item being printed, and parameters for the reports can be set to control the report output (for example a BOM or pick list can be generated on the fly). The drawings can be automatically scaled to normal paper size or scaled to separate printers with various paper sizes. It can also read the Bill of Material (BOM) for parts, collect those drawings and send them to the printer, even if the drawings on are on different paper sizes, or zipped file. This makes preparing drawing packages quick, accurate and easy. A light version with basic features is also available.

## Pick Pro

**Partner Provider:** Balance Point Technologies

Maintain routing pick entries based on the BOM of the selected part.

## MAX Data Collection Module – Shop Floor

**Partner Provider:** Balance Point Technologies

Shop Floor Data Collection contains all the transactions from the Shop Floor Execution module. This module allows you to post quantity, time and/or scrap transactions against shop orders. These are the same transactions found within the Shop Floor Execution module (i.e., post operation completions, scrap, etc.). It directly replaces the same functions and provides expanded functionality in others.

## MAX Data Collection Module – Labor

**Partner Provider:** Balance Point Technologies

Labor Data Collection contains transactions from the Labor Tracking module. This module allows individuals and crews to login/logout of work orders and indirect activities. This module directly replaces the same functions in the Labor Tracking module.

Main Menu:W.ELDER

F1 Inventory  
F2 Inquiries  
F3 Labor  
F4 ShopFloor  
F6 Shipping  
F7 Labels  
F8 Sys Password

F10 Send Message  
F11 Select Printer

GO TO:

F5-Back

## **MAX Data Collection Module – Labor Manager (LABMAN)**

**Partner Provider:** Balance Point Technologies

When you think of Labor Manager, think Time and Attendance (T&A). Time is the accumulation of time against direct (i.e., a work order) and indirect time. Attendance, which is most commonly found in a separate non-integrated sub-system, is driven by a time clock, and directly integrated to payroll software. Labor Manager allows employees to log in and out of payroll and work, keeps track of time and attendance processing with standard shifts, breaks and meal times.

The addition of the Labor Manager (LabMan) for MAX module allows for a single integrated system to be used for both MAX production reporting (i.e., job/order costing) and payroll (i.e., direct and indirect time). This provides greater control over production labor and time reporting while reducing the manual effort required to process payroll. Supervisor/subordinate relationships can be defined so supervisors can quickly approve subordinate time reporting. The module will automatically apply rules for breaks, lunches, and standard meetings each with their own start and stop times. Employee work records can be corrected, and changes generate corresponding entries in Transaction History and Job Progress tables if applicable.

You can also eliminate the task of keying payroll transaction data into your payroll system by integrating Time and Attendance with MGP Payroll or other payroll systems.

## **Lean Tools**

**Partner Provider:** Balance Point Technologies

The Lean Toolkit module provides utilities for those that are implementing lean methodologies in their organizations, all of which are launched from the Start Menu programs or a related shortcut.

### ***Backflush by Operation***

As production moves down the assembly line and production sequences are processed as complete, all the material that is used within that sequence can be issued from stock. This minimizes the number of transactions required by operators and keeps inventory moving with the actual flow of production. There are other features available in this toolkit and more are being added periodically.

### ***Supplier Kanban***

Supplier Kanban is an automatic Kanban replenishment system. As an empty bin is scanned, the material that was in the bin is issued and a purchase requisition is automatically deposited into the purchasing schedule for reorder. The result is a quick way for the stockroom to place a reorder without re-keying data.

## **Production Summary**

MAX ERP is a planning system – down to its time to execute and then, it is a detailed shop floor management and control system. Orders planned through Reorder Point or MRP are released to the floor as a shop order, which forms the basis for this control, as well as work in process accounting. As conditions on the floor changes, the shop orders may be modified to reflect those changes. Alternate processes and subcontract services may also be used to help balance the demand on production and the supply of productive capacity. The Labor Tracking module adds an extra layer of detail to actual direct time, as well as indirect time from production employees. Actual labor completes the accounting and allows for full variance analysis of planned vs. actual.

For individual reports based upon modules found in this Production area see Data & Reporting. Reports are available in Crystal, Excel, and SQL Server Reporting Services (SSRS) to meet your requirements.



# Materials

Efficient material storage and handling, along with accurate transaction processing are at the core of the Materials function. Knowing what we have, where we have it and making efficient and accurate transactions - as the material moves – are critical to the success of the department and the organization.

In addition to keeping data accurate, materials are often tasked with explaining what has happened, thus the ability to view and report on transactions is also important. Solutions in this area focus on these tasks.

## Handy ABC Analysis

**Partner Provider:** HandyWare, LLC

Handy ABC will analyze your parts using transaction history and recommend new ABC codes. Then, you can update your Part Master with those codes. Once set, other MAX Part Master fields (i.e., Order Policies, Period Days, Cycle Count Strategy, etc.) may also be set.

## Planner's Toolkit

**Partner Provider:** Balance Point Technologies

Data quality in your ERP system is of paramount importance, thus data responsibility must be taken seriously if MAX is to be predictable and valid. The Planner's Toolkit contains processes to help establish and maintain inventory and planning data. ABC Analyzer Function is an easy to use tool for using transaction activity or On Hand values and user-defined parameters to assign part master class codes, cycle count parameters, and MRP order policies.

## Advanced MRP

**Partner Provider:** HandyWare, LLC

Stop wondering if you last MRP explosion was valid. This application is a custom "front-end" to your command line MRP process that safely and reliably runs your MRP explosion process. Main features of the application are: 1) the ability to run the MRP in one or more MAX companies on a single schedule, and 2) to run a second pass. For example, the first pass could be for all make parts with the "Consider as Initial Supply" switch activated and the second pass could be for all purchased parts with the same switch deactivated, different horizons or different rounding options.

Bills of material loops and/or out of range dates are handled, as are invalid order policy conditions and nine possible data conditions (unequal order status codes, open orders with zero quantity, etc.) are fixed. Your command line credentials stay secure and each MRP step is reported as successful, or not.

### Materials

- Handy ABC Analysis
- Planner's Toolkit
- Advanced MRP
- Auto Purchase Requisition
- Add Purchase Requisition
- Explosion Shortage Analysis
- Quality @ Receiving
- MAX Data Collection Module – Inventory
- Multi-site Inventory Viewer
- Transaction Viewer
- Close Purchase Orders

## Auto Purchase Requisition

**Partner Provider:** HandyWare, LLC

Automation is being used throughout the ERP industry to make systems more efficient by reducing manual steps and the associated overhead. AUTO PR is a “background” process that consists of two components:

KnowledgeSync™

- ECI Software’s KnowledgeSync Alerts and Automation (KSAA) application – Monitors the Microsoft SQL Server database and acts.
- Custom SQL process – Creates a purchase requisition when on hand inventory (from Part Master and/or Part Stock ROP) drops below its established ROP and there are no open orders.

The result is a new Purchase Requisition (PR) in MAX – Purchasing Control – Activity – Purchasing Schedule. The next time the buyer refreshes, it is ready for human action. Using the MAX one click Assign or Auto-Assign features you now quickly and accurately have a purchase order ready for the supplier!

## Add Purchase Requisition

**Partner Provider:** S.I.M Consultores S.A.S

The purpose of this utility is to be able to generate purchase requisitions for inventoried and non-inventoried parts without the need to log into MAX. Both appear in the Purchasing Control – Activity – Purchasing Schedule.

## Explosion Shortage Analysis

**Partner Provider:** HandyWare, LLC

This SSRS based report displays the cumulative demand for a selected parent part, as well as the cumulative net available for all components for that part based on total supply and demand for each component across the time horizon.

The report contains powerful front end selection:

- By selecting the Planner ID, a list of all commodity codes under the planner will be returned.
- By selecting the Commodity Code, a list of all parts under the Commodity Code will be returned.
- The list is selectable to remove parts not wanted (already planned correctly).
- When processed, all parts selected will be displayed in a grid.

The net available calculation across time for each part in the list shows where demand and supply do not match.

## Quality @ Receiving

**Partner Provider:** HandyWare, LLC

Receiving inspection is a specialized skill is an important part of quality management and maximizing quality throughout the production function. Quality @ Receiving helps manage the flow of material through the incoming quality process, report results from inspection activity and quantify the Results of Your Receiving Inspection (RI) Process.

The system functions as a queue monitor for incoming inspection and tracks Input to the queue, output from queue – accepted, output from queue – rejected and yield (accepted divided by input) by Units of Measure (UOM) and date. The age of the parts in the queue is calculated and displayed. Priority is determined by first in/first out (age), which parts report to top level sales orders and which have immediate requirements (i.e., shop orders).

Reports are available for parts on hold, approved material from manufacturers', and approved suppliers, but the best output is supplier yield percentage.

## MAX Data Collection Module - Inventory

**Partner Provider:** Balance Point Technologies



The inventory module contains all of the transactions from MAX the Inventory Control module. All transactions support parts that are under lot and/or serial control. In addition to performing inventory transactions, it can print documents and labels through data triggers. It is designed for quick scanned entry from a variety of client devices including wireless handhelds.

The base software provides a platform for communicating to client devices and making calls to MAX. Screens can be configured to accomplish a variety of special tasks along with the standard MAX transactions.

## Multi-site Inventory Viewer

**Partner Provider:** Balance Point Technologies

The Multi-Site Inventory Viewer will show consolidated on hand inventory from up to three separate MAX databases. This is necessary for managing remote warehouses and consignment stock. See the stock identifier, on hand inventory, requirements against that inventory and scheduled orders for each part from all databases.

## Transaction Viewer

**Partner Provider:** Balance Point Technologies

Transaction Viewer provides a real time display of MAX transaction activity. The MAX Transaction Viewer displays totals for each type of inventory transaction, as well as, the detail transactions. Use to monitor a specific type of activity or to verify reports.

## Close Purchase Orders

**Partner Provider:** S.I.M Consultores S.A.S

The purpose of this utility is to be able to close or post many purchase orders from a single screen. This Utility will allow user to close any purchased orders to status 4 from an open status 3. It will also allow you to post any status 4 purchased orders to status 5 so they won't show in the inventory control browsers.

## Materials Summary

Every materials management organization shares the goal of having the right part in the right place at the right and MAX's materials area is based upon true industry fundamentals. MAX tracks your entire inventory, and with the Physical Inventory module, it simplifies very that inventory is really present. All transactions, regardless if lot or serial tracking is used, have been designed to process individual or as groups (i.e., receive the entire PO from a pick list). Purchasing management is streamlined through the use of the Purchasing schedule and the Repetitive manufacturing module helps process production completions where shop orders are not required. These features lower the overhead associated with operating MAX and using it to run your business.

For individual reports based upon modules found in this Materials area see Data & Reporting. Reports are available in Crystal, Excel, and SQL Server Reporting Services (SSRS) to meet your requirements.

# Finance

Accurately and adequately reporting activity in quantities, as well as dollars and cents, is a must to keep the accountants out of the warehouse and off the shop floor. These Partner Products support the accounting and finance function.

## Advanced Commissions

**Partner Provider:** Balance Point Technologies

Advanced Commissions is a flexible and comprehensive tool that simplifies the commission payment process. Commissions can be calculated for invoices generated or for payments received based on information posted in Dynamics GP along with the sales transaction details in MAX. For each sales transaction, users can edit the salesperson, commission rate, and commission split. The payables transaction is automatically created in GP. This tool is a must have for companies that have numerous salespeople or a complicated commission process.

## Tax Coordinator

**Partner Provider:** Balance Point Technologies

**Tax Coordinator** simplifies the process of maintaining tax codes and accurately assigning them to customers. Tax Coordinator creates the necessary tax codes and assigns them to all taxable ship to addresses in MAX. At the end of the period, Tax Coordinator generates files and supporting reports for each state that can be used to prepare the state filings, or to upload to a service provider.

The module uses a web-based tax subscription service and creates a sales tax code within MAX and GP for each taxable ship to address. Tax codes can be created or updated for a single address, or for all records in MAX, ensuring accurate tax codes based on the city, county, state, and zip code of the ship to address.

This utility increases the accuracy of sales tax returns by ensuring that accurate tax codes and rates are assigned to sales orders and that activity on those codes are properly reported and filed.

## Customer Hold Reports

**Partner Provider:** Balance Point Technologies

Customer Hold is for the MAX Company that uses Credit Limits and Aging Periods to determine if product can be shipped to customers. The utility will read the Dynamics GP accounts receivable data and then update the MAX Credit Hold field if customers are over their credit limit or late to pay their invoices.

### Finance

- Advanced Commissions
- Tax Coordinator
- Customer Hold Reports
- Handy Material Overhead Update
- Handy Cost Roll
- Inventory Balance Analyzer
- Handy WIP Difference Analyzer
- From/To Charge Analyzer
- Handy Create Voucher
- Payroll Integration
- MAX Toolbar for Dynamics GP

## Handy Material Overhead Update

Partner Provider: HandyWare, LLC

Handy Material Overhead Update prompts for a new material overhead rate and, while updating all purchased parts with that rate, it recalculates the total cost of the part using all cost fields.

## Handy Cost Roll

Partner Provider: HandyWare, LLC

The Handy Cost Roll was designed to perform a more efficient cost roll-up on large databases (i.e., greater than 100,000 part numbers) where running a normal cost roll would take an extreme amount of time.

## Inventory Balance Analyzer

Partner Provider: Balance Point Technologies

Inventory Balance Analyzer provides the ability to calculate the on-hand inventory balances as of two specified dates.

## Handy WIP Difference Analyzer

Partner Provider: HandyWare, LLC

WIP accounting is sometimes a nightmare even for those with an accounting background. This is due to the complexity surrounding the flow of manufacturing costs across the shop floor and the need to ensure that all production costs and overhead are accounted for.

As transactions are executed in MAX, they are summarized in debit and credit general ledger format and sent to the integrated accounting system. Some unforeseen factors like order maintenance can pop up and throw a wedge into this process and create variances.

With the Handy WIP Difference Analyzer you can quickly and effectively reconcile WIP details with accounting balances.

It is a robust application that verifies that the total debits and credits to WIP, which are processed as transactions, are still reflected in the details of the WIP report. It quickly shows where out-of-balance conditions have occurred, enabling ease of reconciliation as needed and ensuring accurate production costing. This resolves the WIP accounting nightmare and ultimately results in improved ROI.

Order Nbr	MAX WIP Report	Mfg Adj	Adjusted Mfg WIP	WorkGL Balance	Unposted Trans Hist	Acc Adj	Adjusted Acc WIP	Mfg/Acc Difference	Recon Status	Remarks
500039010000	732.18		732.18	48.30	0.00		48.30	683.88	DIF	
500042990000	1,684.66		1,684.66	-390.88	0.00		-390.88	2,075.54	DIF	
500492270000	7,818.65		7,818.65	7,432.37	0.00		7,432.37	386.28	DIF	
500492510000	294.48		294.48	-576.73	0.00		-576.73	871.21	DIF	
500492970000	195.71		195.71					195.71	DIF	
500503030000	4,319.13		4,319.13	509.20	0.00		509.20	3,809.93	DIF	
500503950000	158.22		158.22	0.00	0.00		0.00	158.22	DIF	
500519130000	21.24		21.24	-204.06	0.00		-204.06	225.30	DIF	
500523410000	8.82		8.82	-171.11	0.00		-171.11	179.93	DIF	
500527860000	134.36		134.36	-31.03	0.00		-31.03	165.39	DIF	
500528440000	152.60		152.60	152.63	0.00		152.63	-0.03	DIF	
500534400000	885.75		885.75	885.78	0.00		885.78	-0.03	DIF	
500544940000	5,684.96		5,684.96	7,060.63	-1,375.64		5,684.99	-0.03	DIF	
500545100000	4,918.31		4,918.31	4,918.35	0.00		4,918.35	-0.04	DIF	
500547150000	8,068.39		8,068.39	8,068.41	0.00		8,068.41	-0.02	DIF	
500547810000	3,290.02		3,290.02	3,290.05	0.00		3,290.05	-0.03	DIF	
500548450000	41,139.95		41,139.95	41,139.98	0.00		41,139.98	-0.03	DIF	
500548470000	17,452.58		17,452.58	10,168.38	2,264.24		17,452.62	-0.04	DIF	
500549580000	2,943.76		2,943.76	2,943.79	0.00		2,943.79	-0.03	DIF	
500549680000	6,529.32		6,529.32	5,354.87	1,174.47		6,529.34	-0.02	DIF	
500552250000	474.74		474.74	474.76	0.00		474.76	-0.02	DIF	
500553980000	305.05		305.05	305.08	0.00		305.08	-0.03	DIF	
500553160000	6,231.22		6,231.22	6,231.25	0.00		6,231.25	-0.03	DIF	
500554000000	5.20		5.20	5.23	0.00		5.23	-0.03	DIF	
500554950000	358.88		358.88	358.94	0.00		358.94	-0.06	DIF	
108,808,1900	0.000000		108,808.19	97,994.190	2,063.0700	0.000000	100,057.26	8,750.9400		

## From/To Charge Analyzer

**Partner Provider:** Balance Point Technologies

The From/To Charge Analyzer tool is designed to extract data from Transaction History with Accounts assigned for easier reconciliation and analysis.

## Handy Create Voucher

**Partner Provider:** HandyWare, LLC

Handy Create Voucher will receive invoice data (i.e., part number, quantity, cost, and invoice number) and if found in the purchase order receipt table with the same data, will mark the receipt record as “marked” and create a voucher record containing the invoice number. That record will be ready for final approval (i.e., check the Mark Voucher for Posting checkbox).

The result is considerable savings in accounts payable time when accounting data is properly aligned (i.e., purchase order prices, quantities received and invoice prices).

## Auto Financial Posting

**Partner Provider:** HandyWare, LLC

The early days of integrated manufacturing control systems promised almost real-time financial reports – as accurate as the last posting – yet many organizations never realized that promise. Automation makes it very easy to achieve real-time integration while reducing manual steps and their associated overhead.

KnowledgeSync™

AUTO Financial Posting supports the following financial posting processes:

1. Post Order Close – By date range – Not available in MAX.
2. From to Charge Report – Not available within MAX.
3. Post Sales Orders.
4. Post Vouchers.
5. Post Work General Ledger.

AUTO Financial Posting is another example of how KnowledgeSync Alerts & Automation can be used to streamline workflow.

## Payroll Integration

**Partner Provider:** Balance Point Technologies

Ideal for those MAX customers using MAX Data Collection – Labor Tracking and Payroll, it affords the user the ability to reduce the costs associated with expensive payroll processing services and realize Return on Investment (ROI) in as little as 6 months.

## MAX Toolbar for Dynamics GP

**Partner Provider:** Balance Point Technologies

The MAX to Great Plains Dynamics flow of accounting data is primarily a one-way flow – from MAX to Great Plains Dynamics. All the transaction data flows from MAX through a table called General Ledger Work and into the batch processing for each module (i.e., Accounts Payable, Accounts Receivable, and General Ledger). With MAX Tool Bar, you can click on a button within that batch in GP and open the corresponding MAX information without leaving the Dynamics GP environment. This saves accounting some time and effort when they have questions about MAX data in Great Plains Dynamics. Stay on top of your finances and enjoy faster research.

Quickly and easily view MAX documents and transactions affecting the GL using a toolbar that blends perfectly with GP. See the complete detail of MAX invoices, vouchers, purchase orders and transactions posting directly to the GL. Maintain customers, vendors, shipping methods, payment terms and salesperson. Choose to update any, all or none of MAX data when updating records in GP. Export data to Excel as required for further analysis, sorting data how you need to see it.

## Finance Summary

The MAX Costing and Financial Integration modules take care of the “accounting” side of the system. Product costing establishes the standard cost for every part in the system, which is then used to track performance against that standard. All transactions generated are also costed using these same costs and the results posted to the integrated accounting system. In addition, three vertical flows of data move from MAX to accounting: Sales Order Processing to A/R, Purchasing to A/P and all other inventory type transactions to G/L.

For individual reports based upon modules found in this Finance area see Data & Reporting. Reports are available in Crystal, Excel, and SQL Server Reporting Services (SSRS) to meet your requirements.



# Information Technology

Information Technology (IT) from the ERP perspective is all about providing support when it comes to loading and maintaining data and facilitating reporting. There are many solutions to help data maintenance, including loading data, changing data, and deleting data (even on indexed fields).

## MAX Data Collection Monitor

**Partner Provider:** Balance Point Technologies

Data Collection for MAX supports 18 useful transactions with real-time validation and processing against the MAX database using either Fixed Mount or Radio Frequency (RF) devices.

The MAX Data Collection Monitor runs on a Windows PC on your network and functions as the server to the data collection devices. All processing is done by this host application, and there is minimal client installation/administration. Input values are validated, and errors are communicated immediately to the operator, who virtually becomes a MAX user empowered to process transactions in real time.

With Data Collection, you can...

- Validate and process scanned data against the MAX database in real-time.
- Utilize bar codes and scanners to eliminate the need to type.
- Access information on the fly.
- Look into inventory levels, transaction history, job progress, and BOM “where used”.
- Enjoy 99.9% error free entry.
- Customize options to fit your needs.
- Use any tethered or RF scanning device capable of connecting to a network via TCP/IP.

Investing in the MAX Data Collection system is one way to gain more user access to MAX without purchasing additional MAX user licenses. This strategy moves those who only do lookups and transactions to a scanner or tablet-based system where they do not need to log directly into MAX.

This is included in with all MAX Data Collection Modules.

## MAX Workbench

**Partner Provider:** Balance Point Technologies

MAX Workbench will manage the authorization configuration of applications developed by Balance Point on Company or User/Company levels. It will provide the users with ability to create their own work environment and those who are designated as managers will be able to configure or modify work environments for the regular users.

The application will list all available applications for purchase. It shows the MAX Company database and the applications purchased. It also shows the named users that are to be allowed access to the application. Finally, it will notify the user when an update to an application is available.

### Information Technology

- Data Collection Monitor
- MAX Workbench
- Master File load
- Quick Data Loader
- Table Loader
- ID Changer
- SuperZap
- Handy Process Executor
- Handy Drop
- Handy Data Cleanup
- Handy Data Audit

## Master File Load

**Partner Provider:** S.I.M Consultores S.A.S

This utility will allow you to load new data into MAX from an Excel template. Available tables include: Part Master, Bills of Material, Work Centers, Part Routings, Customer Master, Vendor Master and Part/Vendor Data. It also allows forecasts, sales orders, manufactured and purchase orders to be loaded.

## Quick Data Loader

**Partner Provider:** Balance Point Technologies

Quick Data Loader provides methods for quickly populating data in an existing MAX database.<sup>1</sup> All data is imported from Excel files, which may consist of multiple tabs. Four major areas of MAX data may be loaded:

- Bills of Material—Add new or update existing standard or alternate BOM in the Product Structure table. Use effective date from load file or assign a date to all components. Create new Part Master and Manufacturers' Part Master records during BOM load.
- Orders –Load new Sales, Shop, Purchase and Non-inventoried PO's or update existing.
- Static Data – Upload new or changed data into almost any MAX static table.
- Transactions – Upload unplanned issues and receipts and stock to stock transfer transactions.

Quick Data Loader ensures that all data is validated against MAX data standards and populates default table values not in the input file. This prevents users from unknowingly shutting down MAX functionality due to data errors.

This tool obviously produces value for new MAX implementations but is also valuable for MAX re-implementations or when large volumes of data need to be updated/scrubbed. It is also perfect for contract manufacturers where customer data must be routinely loaded for quoting and production.

## Table Loader

**Partner Provider:** Balance Point Technologies

Table Loader provides methods for loading various sets of data from spreadsheets into MAX. GL Overrides, Cost Sets, Part Data, Routings, Customer Part Data, and Manufacturers Part Master can be easily loaded into MAX.

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## ID Changer

**Partner Provider:** Balance Point Technologies

**ID Changer for MAX** solves a specific issue for when data that is stored in indexed fields need to be changed as the SQL Server will not allow indexes to be changed directly. Examples of such data include Part, Customer and Vendor Identifiers.

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<sup>1</sup> Quick Data Loader replaced the original BOM Loader.

Choose from three methods to update Part Numbers, Customer Identifiers, or Vendor Identifiers. One at a time allows you to change one single record. Assign New IDs gives multiple records new sequential IDs incremented by the value you specify. Or update records with an Excel file. Update all related current and historical MAX tables with new record changes at the touch of a button.

All related data and transactions in all MAX tables, both current and historical, are changed. Previous values are stored in the database for reference. Establish new naming requirements or change key fields to match customer and vendor name changes.

## SuperZap

**Partner Provider:** Balance Point Technologies

The SuperZap utility will allow you to remove data from your MAX database completely, quickly, and thoroughly.

MAX is a set of data tables that are built upon each other. For example, parts are entered the part master and then used on bills of materials. They are opened on orders to be bought, built, and sold. Each transaction is recorded in the Transaction History table. If you try to remove a part number, MAX will complain and not allow you to do so because the part is used in another table. This protects what is called “referential integrity.”

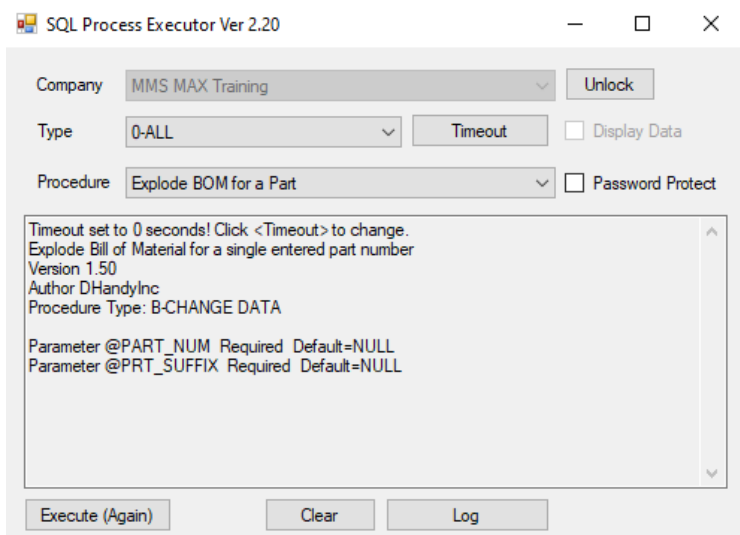
In theory, you would need to stop using the part, and after a few years, purge all the data, and then remove all the data build up one step at a time. Or you could just use SuperZap! SuperZap prompts you for a part number, and then does a “search and destroy” for that part in ALL database tables. This module is extremely handy for those who have had MAX for ten years or more and want to discard the data from early days. Reducing the table size and the number of parts to manage leads to a savings in overhead.

Even after running the Archive Manager module, you may want to use SuperZap to remove static data (i.e., parts, BOMs, stockrooms, customers, etc.) that are no longer used.

## Handy Process Executor

**Partner Provider:** HandyWare, LLC

Most database managers and administrators like SQL because of its ability to efficiently process data and update values at the database level. SQL procedures are now being used to replace what was once a compiled Visual Basic application with a lot less associated overhead (i.e., no installation programs, and/or other pre-requirements, etc.). Externalizing these procedures however, so that they can be made part of normal operations and not an IT function, is very challenging. This challenge is exactly why the Process Executor was developed.



With Process Executor it is possible to install a SQL script in the MAX database and then externalize it so that a user, without access to SQL Server Management Studio (SSMS) can use it.

When running stored procedures outside of the SQL Server environment, the Process Executor application will handle all security and any user parameters that need to be passed. Procedures may be called from the MAX Module Control Panel, Tool's menu, or desktop icon.

The perfect example is a script to update Material Overhead where an integer needs to be passed to the database and a new cost calculated. The interface asks for the number and the script handles all the work (i.e., receives the new rate, saves it to the Part Master, and then recalculates the total cost of the part based upon that rate). Back in the 1990's, this was a compiled Visual Basic application. Now it is a script with a re-useable front end. Re-useable meaning it can call any other script in the database. This safely puts tremendous power in the hands of the normal user and minimizes IT work.

This application includes a SQL Script "Shell" so you can add your own creations to your script library.

### **Handy Drop**

Partner Provider: HandyWare, LLC

This small application makes it effortless to associate documents in MAX by dragging and dropping documents of common types into the application's icon. The dropped documents will be associated to the desired MAX item with far less effort than performing the same function from within MAX, one by one.

### **Handy Data Cleanup**

Partner Provider: HandyWare, LLC

The Handy Data Cleanup routine should be run on a periodic basis to cleanup data conditions left through normal MAX operation. For example, purging temporary printing and MRP Explosion tables from the SQL database, validating sales order status codes, closing orphan purchase order lines, etc.

### **Handy Data Audit**

Partner Provider: HandyWare, LLC

The Handy Data Audit (HDA) application allows the user to summarize even the largest database within minutes. The results are a list of MAX features and functions that are licensed at your organization but may or may not be in use. These areas represent where additional benefits may be obtained from your MAX investment for very little added cost.

The HDA tool reports the number of records in each MAX table, the number of records for system features, critical fields, and significant data. It also reports enumeration values for operational fields (e.g., part types, status codes, etc.), the minimum and maximum date values, minimum, average, and maximum numeric values. Input file specifications can be tailored for specific customer analysis. Data violations become obvious.

This tool is offered as a service through our Professional Services department.

## **Information Technology Summary**

The MAX System Manager is the first screen every user sees when they log into MAX, but also contains basic functionality for system administration and configuration used by the Information Technology (IT) department.

For individual reports based upon modules found in this IT area see Data & Reporting. Reports are available in Crystal, Excel, and SQL Server Reporting Services (SSRS) to meet your requirements.

# Data & Reporting

There are many different automation and reporting applications available in the MAX market and these solutions are not mutually exclusive. For example, the materials organization may prefer Crystal Reports to dispatch produce lists, the shop floor may prefer their reports served to work center monitors, and Accounting & Finance prefer Excel based reporting. For as many different reporting packages available we have experienced reporting professionals and literally thousands of reports.

## Structure Importer

**Partner Provider:** HandyWare, LLC

Structure Importer reads any SQL database and “pumps” out the entire database (i.e., tables, fields, and data elements) to a Microsoft Access database where each of those levels may be documented. This application was designed and built to keep up with changes to the database. It can process ANY SQL database.

Originally, the tool was focused on documenting all tables. Over the years however the tool has been expanded to capture tables, views, procedures, triggers, notes, and base table enumerations. It has also been expanded to capture the changes between database versions and log database history.

Most users will only see the documentation side of the application. This is the user interface where descriptions to tables, views, fields, and field enumerations are maintained. Users can describe the database in any terms they wish including local uses of fields.

## Database Reference Guide (PDF Format)

**Partner Provider:** Micro Manufacturing Systems

This offer is simply to receive the Structure Importer table descriptions in Adobe PDF format.

## SSRS Report Installer

**Partner Provider:** HandyWare, LLC

Quickly and accurately backup and install SQL Server Reporting Services (SSRS) reports and stored procedures in your Microsoft Report Server. Browse for the folder containing the report file, set the settings for the data source and “Deploy”. All installed reports on the report server can be backed up with a few clicks, with the existing folder structure created in the target location. Installation of stored procedures, views and functions is also supported, as well as encryption of stored procedures to reduce tampering with the code. Stored procedures can be tested and combined into a single command suitable for automatic execution using the SQL Agent, according to a schedule. This application is also available in a light version.

### Data & Reporting

- Structure Importer
- Database Reference Guide
- SSRS Report Installer
- Label Pro
- Handy SSRS Labels
- MAX Report Runner
- MAX Report Viewer
- MAX Market Analyzer
- Custom Crystal Reports Library
- Custom Excel Analytics Library
- Custom SQL Script Library
- Custom SQL Script Introductory Bundle
- Custom KnowledgeSync Alerts & Automation Events Library



MAX DATABASE REFERENCE

MAX v5.6.1 Database Tables, Fields, Enumerations and Indexes

Database Descriptions from Structure Importer Software Application.

## Label Pro

**Partner Provider:** Balance Point Technologies

MAX Label Pro provides a quick and easy way to print custom carton labels for a multitude of purposes and supports multiple label formats for each. Print necessary labels for the following processes:

- Parts – Print parts labels for inventory.
- Sales Orders – Print's carton labels for sales orders.
- Purchase Orders – Print carton labels for each part received.
- Shop Orders – Print carton labels for each part produced.

Label data may include label count, box count, package weight and comments. The label also contains part number, description, quantity, and other data as well as bar codes.

## Handy SSRS Labels

**Partner Provider:** HandyWare, LLC

This application makes it effortless to print all kinds of labels based on SSRS reports. Unlike in a typical SSRS session, printer output is more controlled, with success confirmation, serial number control of label count printed, and setting of a different target printer for each label.

The following is an example of a carton label with the selection criteria parameter pane:

The screenshot displays a software interface for printing labels. At the top, there is a parameter pane with the following fields:

- Low Order: 520004490000
- High Order: (empty)
- Labels to Print: 520004490000-2004J0011 (dropdown menu)
- Special Text (csv): (empty)
- NULL:

Below the parameter pane is a printed label. The label features a QR code in the top left corner. The main text on the label is:

**0045-000**  
TURNOVER MACHINE COMPLETE  
SER#: 2004J0011  
WT: 30.0 lbs (13.6) kg  
BIN: TBD

At the bottom of the label, there is a vertical barcode on the left with the text "0045-000" and "SER#: 2004J0011" next to it. In the center, the "MAX" logo is displayed in orange. On the right, there is another QR code and contact information:

137 Max Lane  
Sunny, CA 23456  
www.max.com  
(800) GET-DONE

## MAX Report Runner

**Partner Provider:** HandyWare, LLC

This SQL Server Reporting Services (SSRS) utility was written to launch internal MAX reports from outside of MAX. The main benefit of this application is that when the report is selected, it provides the report dialog screen so that the internal MAX parameters, which are required for the report to run, may be selected. This allows non-traditional MAX users to run MAX reports without requiring MAX credentials. 45+ commonly run MAX reports are provided.

## MAX Report Viewer

**Partner Provider:** S.I.M Consultores S.A.S

This utility provides read only access to custom external Crystal Reports to both traditional and non-traditional MAX users. You can organize the reports the way you want it according to each area in your company and the viewer will display that organization in an easy to use, bill of material like, format. Double click the report name and the report will execute.

## MAX Market Analyzer

**Partner Provider:** Balance Point Technologies

MAX Market Analyzer provides a user-friendly method for running numerous sales reports from MAX Invoice History. 40+ Crystal Reports are included.

## Custom Crystal Report Library

**Partner Provider:** Micro Manufacturing Systems

Please request a copy of our Crystal Report Library that runs on the MAX Database. At the time of this printing the library contained 545 custom reports to help you report on and administer your MAX database.

## Custom Excel Analytics Library

**Partner Provider:** McLane Consulting Services

Please request a copy of our Excel Analytics Reports Library that runs on the MAX Database. While Excel Analytics ships with 50+ pivot tables and reports, there are many custom options available to help you report on and administer your MAX database.

## Custom SQL Script Library

**Partner Provider:** HandyWare, LLC

Please request a copy of our SQL Script Library that runs with the Process Executor. At the time of this printing the library contained 60+ custom reports to help you report on and administer your MAX database.

## Custom SQL Script Introductory Bundle

**Partner Provider:** HandyWare, LLC

Externalize the use of Microsoft SQL functions to do common MAX maintenance tasks and improve processes. Fifteen common scripts priced at 60% of the price if sold separately.

## Custom KnowledgeSync Alerts & Automation Events Library

**Partner Provider:** Various Developers

Please request a copy of our Custom KnowledgeSync Alerts & Automation Events Library that runs on the MAX Database. This library includes a free sample event pack, as well as custom events to help you automate your MAX processes.

### Custom Reporting

The MAX Database can safely be read by almost any reporting package in the market today and these packages are not mutually exclusive.

Accounting may prefer Excel, Production SSRS and Materials Crystal Reports. Expand your possibilities.

## Reporting Summary

For decades, MAX has been known for its open database. It is your data. Whether you want to verify data it, analyze it or use it produce charts and graphs, just pick the tool of choice, and turn data into information to operate your business. Use alerts and automation to drive the correct actions throughout your organization.



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## Intentions:

This document was written to provide a high-level overview of all expansion modules, tools, utilities, and reports for ECI Software Solutions MAX Enterprise Resource Planning (ERP) application for both prospects and customers that are interested in learning more about custom program availability.

For operational and/or technical questions or support on this document, please contact:



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