MAX Virtual Training Series
Fall 2020

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ECI MAX Virtual Training Series

This document outlines MAX Training designed by Micro Manufacturing Systems for the fall of 2020. Objectives of all training include:

- Expand on the traditional MAX Fast Track training course.
- Expand beyond clicks and tricks within MAX.
- Teach fundamentals of internal supply chains (where MAX ERP is the tool to manage).
- Present ERP paradigms and challenge preconceived ideas and conventional wisdom.

All courses are designed as instructor assisted training and workshops. While they have been designed as virtual courses may be taught in a Face to Face (F2F) session with minor adjustments. They have been designed for adult learners and utilize current virtual training methods and tactics.

Training

Courses marked as "training" will introduce concepts and review specific MAX internal supply chain topics. These public sessions are typically held in a single session. Training sessions are a mix of free and paid.

All "training" sessions:

- Are primarily synchronous training, but may contain simple polls and questions for engagement.
- Incorporate interactive technology (clickable slides, polls, chat, quizzes, gaming, etc.) to keep participants engaged.

There may be a minimum participant requirement for paid courses. There are no enrollment requirements on free sessions.

Workshops

Courses marked as "workshops" teach MAX concepts using current, industry standard, virtual training methods which demands participant interaction in sessions like they have never done before. These are multiple session, multiple hour sessions that all a deeper dive into MAX functionality and processes.

All "workshop" sessions:

- Are paid sessions.
- Utilize Blended Learning concepts.[1]
- Assume learning extends outside of the session (i.e., participants will prepare for sessions prior to the scheduled date, do assignments between dates, etc.).
- Are presented using a mixture of learning preferences (i.e., see to learn, hear to learn, do to learn).
- Promote peer to peer engagement.
- Incorporate interactive technology (clickable slides, polls, chat, quizzes, gaming, etc.) to keep participants engaged.

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[1]Contains components of Synchronous (instructor led training) and Asynchronous learning (self-paced training outside of schedule class such as watching a video, reading a white paper, direct participation, etc.

These public workshops and can be purchased by a single company providing they meet requirements. All have a minimum enrollment of 6 participants and a maximum of 14 participants.[2]

Instructors

All instructors using this material are experienced MAX instructors and certified by ECI Software Solutions as an authority in the MAX Body of Knowledge (BOK).

Training Categories

All ECI MAX training courses and workshops have been designed using the MAX ERP System Overview model and contains the following Training Categories:

> 00 – Background concepts.
> 01 – Engineering.
> 02 – Customers.
> 03 – Scheduling.
> 04 – Production.
> 05 – Materials.
> 06 – Finance.
> 07 – Information Technology.
> 08 – Data and Reporting.

These areas map to both the organization of modules within the MAX System Manager, as well as, typical departmental structures found in small to mid-sized manufacturing organizations.

Who Should Attend

For the most part, the training categories described above identify the targeted audience. For example, the engineering department should be fully trained in all modules and processes found in 01-Engineering. Sales should be fully trained in modules and processes found in 02 – Customers, and so on.

Because financial transactions are driven by MAX transaction processes, accounting typically has interest in learning the operational side of MAX. Information Technology shares this interest in terms of system security and system configuration. Both should therefore participate.

Finally, every organization should have a MAX Champion role. This role should know as much about the entire MAX system as possible. The MAX Champion should be in attendance for every session.

Materials Required to Begin Course

Each student will require the following:

- Personal computer, laptop or tablet with video camera.
- Solid Internet connection.
- If course requires data, data installed in Training Company. This is typically on the company file server.
- Other material will be sent to participants enrolled prior to the start of the course where required.

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[2] Required for operational reasons (i.e., learning experience in the classroom) and for financial reasons (i.e., minimum profit margin objectives for independent contractors). See planning worksheet.

Additional Information

- It is highly recommended that only one person utilize each reserved seat so that collaboration among participants' works as planned and we can provide full support.[3]
- All materials will be provided electronically.
- Sessions will be recorded for internal use only. Recordings will not be distributed to attendees.[4]
- Certificates of completion are available upon request.

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[3]Not applicable to free sessions.
[4]Ibid.

Training Course Descriptions– September

The following courses have been planned for September. A brief description for each workshop follows.[5]

The MAX ERP Overview Model – Free – 1 hour

Category: 00 – Background Concepts.
This course kick off the fall program for MAX training.

Course Overview:

Models are used throughout MAX training to visually describe the workings of the system.

This course introduces one of the most basic models, the MAX ERP Overview model. The model is a high level visualization that maps business process areas to both the MAX System Manager and to MAX modules. Using the model, nine highly integrated areas are reviewed. The same nine areas are also used within the MAX training program, thus this model is a fundamental roadmap for understanding MAX ERP.

Course Learning Objectives:
Upon successful completion of this course, students will:
- Learn one of seven methods of visualizing the MAX ERP system and how that model aligns with the MAX System Manager.
- Learn system narratives so that you are able to explain the system to others.
- Understand major areas for MAX Training.

Course Schedule:
One session with no preparation. Just show up ready to participate and learn.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format.Handout of ERP Systems Overview to MAX System Manager mapping.

Who Should Attend: This session applies to all MAX users that need to understand more of the fundamental models MAX is based upon.

What Should Purchasing Be Concentrating On? – Paid – 1 hour

Category: 05 – Materials.

Course Overview:
The Purchasing role is a highly complex, diverse and important role in any manufacturing organization. It is also highly visible. In our work with purchasing groups over the years, we often find that some of the issues we encounter are simply due to the planners/buyers not knowing what they need to concentrate on. In this session, we provide a step by step guide to the operational aspect of purchasing that may become a guide for what should be accomplished on a daily basis. The result is more effective management of MRP planning data and fewer material shortages.

Course Learning Objectives:

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[5]Course content, details, and timing are subject to change as courses are being developed/finalized.

Upon successful completion of this course, students will:
- Understand how to design effective action to make purchasing processes more effective (ultimately reduce overhead).
- Learn how to separate and prioritize purchasing tasks to support MRP processes.
- Be able to effectively respond to the "we don't have the time" argument.
- Be able to set the priority for how your buyers approach each day.
- Eliminate "working too hard" found in many purchasing departments.

Course Schedule:
One session with no preparation. Just show up ready to participate and learn.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format.

Who Should Attend: Purchasing department (purchasing managers, buyers, planner/buyers, etc.).Also general managers, materials managers and/or purchasing managers who specify purchasing actions.

Training Course Descriptions – October

The following courses have been planned for October. A brief description for each workshop follows.[6]

Process Flow & BOM's Workshop – Paid – 6 hours

Category: 04 – Production.

Course Overview:

You probably have taken courses on Bills of Material (BOMs) and on Shop Floor Routings with discussion on how they integrate with each other, but with a very sketchy process definition.   This workshop changes that. This workshop begins with engineering data and then translates it to the corresponding process flow.   In a second example, it describes the process flow and translates that flow into the "engineering" data so that when scheduled, the production plans to manage that flow actually match what is happening on the shop floor. Along the way, throughput and lead-time, part types and order policies, types of schedules and reports, and other system design features are reviewed.

After two common processes are presented, the discussion will return to how to add levels and/or flatten bills of material to accomplish the proper flow. Use of phantom and pseudo part type codes and the impact of changing those codes on routings will be discussed.

Course Learning Objectives:

Upon successful completion of this course, students will:

- Understand the criterion used to describe a standard process.
- Know that the narratives for how material flows must be aligned with how the ERP system is configured and managed.
- Understand the Fabricate – Paint – Assemble and Mix – Fill and Package standard process flows in terms of the standard criterion identified.
- Be able to apply concepts to your own organization and situation.
- Be able to define what "exists in process" means.
- Understand the definition and use of pseudo and phantom parts and how to use them to reconcile differences in structure and flow.

Course Schedule:

Registration and Prerequisite Reading Materials

      Material required for the first session will be sent electronically prior to that session.

      Read the material at your own pace, just be ready for the first session.

      The balance of the material will be available during the sessions.

Session 1 – Process Definitions.

      Fundamentals of Process Flow

      Names & Types

      Standard Process Criterion

      BOM's, Routings and Flows

      The Fabricate, Paint and Assemble process.

      Homework: White paper on "Is it a level in the BOM or a sequence in the routing?" white paper

      Homework: Quiz on section.

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[6]Course content, details, and timing are subject to change as courses are being developed/finalized.

Session II – Process Definitions – Continued.
        Flow, BOM's and Routings
        The Mix, Fill and Package process
        Flow, Routings and Bills of Material
        In Class Exercise: Quiz on section.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format. White Paper. Custom MAX Crystal Report to help with process.

Who Should Attend: This fundamental data is essential for the engineering team – those who build bills of materials and routings, but also must be understood by material and production managers, and by cost and financial accountants.   Because of the strategic nature of this topic, supply chain managers and anyone responsible for plant performance should attend.

Designing a Lead-time Reduction Program – Paid – 1 hour
Category: 01 – Engineering.

Course Overview:
It is a well-known fact that the longer your cumulative lead-times are, the more difficult management of the Enterprise Resource Planning (ERP) system becomes. Despite that, many organizations treat lead-times as separate, individual data elements instead of a comprehensive strategy. In this session, we will explore all of the areas where lead-time exists within the MAX ERP system and present a structure for a lead-time reduction initiative. After reviewing all of the lead-time fields, we will present strategies for effectively reducing lead-time.

Course Learning Objectives:
Upon successful completion of this course, students will:
- Understand that lead-time is a minimization rule.
- Know the effect of lead-time on the system and why it needs to be set realistically.
- Understand how MAX develops lead-time.
- Understand tactics for controlling lead-time.

Course Schedule:
One session with no preparation. Just show up ready to participate and learn.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format.

Who Should Attend: Members of the engineering team responsible for bills of material and routings, as well as, planners responsible for setting lead-time in the system.

The Power of Crystal Sub-Reports – Paid – 2 hours

Category: 08 – Data & Reporting.

Course Overview:

A sub-report is a report within a report. It is actually its own report that contains its own data structures, record selection, and fields. Sub-reports may be free standing, or unlinked. A freestanding report is a report written on tables that have nothing to do with the main report. A good example is one report that lists the sales for the top ten customers and purchases for the top ten vendors on the same report. When the main, or parent, report is run, the sub-report also runs.

Linked sub-reports are written on data related to the main report. For example, if you want to show all of the open sales orders for a part and then where the inventory is located for the same part, you would use a linked sub-report. After showing the sales order information for the part on the main report, the sub-report would be called so that all of the stock is shown.

This session reviews the basics of sub-reports, how to link them to main reports, and how to share data in between the main report and the sub-report through the use of variables.

Course Learning Objectives:

Upon successful completion of this course, students will:

- Introduce sub-reports and their need and use.
- Understand how unlinked sub-reports may be used to present data.
- Understand how linked sub-reports may be used to present data.
- Understand how the linkages work between the main report and sub-report.
- Understand the difference between implicit and explicit sub-report links.
- Know how to pass data between the main and sub-report using variables.
- Understand the commonly used sub-report properties.
- Understand how to pass data from the main report to the sub-report without using a variable.
- Understand how to pass data from the main report to the sub-report using a variable.
- Understand how to pass data from the sub-report to the main report using a variable.

Course Schedule:

One session with no preparation. Just show up ready to participate and learn.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format.

Who Should Attend: Crystal report developers.

MRP is Talking. Are You Listening? – Free – 1 hour

Category: 05 – Materials.

Course Overview:
Every time you run an MRP explosion, you are asking the Material Requirements Planning (MRP) processor for its recommendations on your production plans and every time, MRP tells you exactly what it thinks. Are you listening? In many cases, we find that MAX is "screaming" for a planner to take action, yet no one seems to be listening. Minimizing exception messages and quickly reacting to them are important to organizational improvement.

To hear and understand MAX MRP we need to be skilled in several areas. First we need to know what the MRP exceptions are and why they were generated. Second, we need to understand dependency, both vertical and horizontal. We also need to know how to peg requirements. Pegging is like a where used analysis, but uses the requirements stream instead of the bill of material. This session will review these areas to make you a better listener.

Course Learning Objectives:
Upon successful completion of this course, students will:
- Understand the concept of managing by exception.
- Understand the Material Requirements Planning (MRP) verification process.
- Be able to state the twelve MRP exception messages and why they occur.
- Understand vertical and horizontal dependencies and how to manage using both.
- Be able to peg a requirement.

Course Schedule:
One session with no preparation. Just show up ready to participate and learn.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format.

Who Should Attend: Materials and production planners, planner/buyers and those responsible for accurate MRP plan outputs.

MRP Mechanics Workshop – Paid – 6 hours

Category: 05 – Materials.

Course Overview:

The heart of any Enterprise Resource Planning (ERP) system is the Materials Requirements Planning (MRP) module. The MRP explosion process performs data analysis, formulates material and capacity plans and makes recommendations to both the shop floor execution and purchasing modules. Through its closed-loop feedback process, detailed information is then communicated back from detailed to upper level plans. Because of the sheer volume of data, most firms rely on the output of the MRP explosion to run the manufacturing/materials side of the business. This places high importance on constructing and executing realistic material and capacity plans.

Even though the system processes the data for us, as managers and planners, we are responsible for knowing how that is accomplished. The workshop has been designed to teach the mechanics of MRP and how those mechanics are executed by the MRP processor.

This course will teach you how to do MRP manually, and along the way, you will learn how all of the MRP planning fields are actually used. Completing this workshop will make you more efficient in identifying and troubleshooting MRP issues.

Course Learning Objectives:

Upon successful completion of this course, students will:
- Understand the goal of MRP.
- Understand the manual, time-phased MRP Worksheet.
- Be able to perform a manual MRP explosion.
- Understand advanced manual MRP concepts.
- Be able to relate learning derived from manual worksheets to MAX MRP.

Course Schedule:

Registration and Prerequisite Reading Materials

       Material required for the first session will be sent electronically prior to that session.

       Read the material at your own pace, just be ready for the first session.

       The balance of the material will be available during the sessions.

Session 1 – MRP Mechanics – Part I.

       MRP Mechanics

       Presentation and definition of the MRP planning grid

            Define criteria that effect MRP planning

       Step by step – Performing Manual MRP.

Session II – MRP Mechanics – Part II.

       More step by step – Performing Manual MRP

       Advanced manual MRP field (yield, scrap, lead-time offset, etc.)

       Mapping MAX to the grid.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format.

Who Should Attend: Master schedulers, material and production planners, and other parties responsible for materials and/or capacity planning in your organization.

Training Course Descriptions – November

The following courses have been planned for November. A brief description for each workshop follows.[7]

Using SQL in Crystal Reports – Paid – 2 hours

Category: 08 – Data & Reporting.

Course Overview:

There are two fundamental and mutually exclusive methods for using SQL statements in a Crystal Report. First you can use SQL to create a Command table. These are "logical" groupings of actual MAX tables that have been linked and are pre-processed before the rest of the Crystal Report. Crystal Reports refers to these as "virtual" tables. Creating command tables allows you to preprocess some of the data prior submitting it to the rest of the report. Once they are created, you can use them like a table and link additional MAX tables to them.

Crystal Reports creates SQL code for the main portion of your report and there is a utility to see that code. This is significant for users that do not have access to the SQL Server Management Studio (SSMS). These users can develop the basic structure for a report and then copy the SQL code and paste it into a command table.

The second is the ability to use SQL expressions in a Crystal Report. SQL expressions are part of the User Function Library (UFL) shipped with Crystal. In this session I will show you where to find them and how to use them to put the database name on your reports.

Course Learning Objectives:

Upon successful completion of this course, students will:

- Understand the two fundamental methods for using SQL statements in a Crystal Report: Command Tables and SQL Expressions.
- Understand how to create a command table.
- Understand how to use a parameter with the command table.
- Understand how to use SQL expressions, internal to Crystal Reports, in your reports.
- Understand how Crystal Reports generates basic SQL code for your report.
- Be able to find and read the SQL code from an existing report.

Course Schedule:

One session with no preparation. Just show up ready to participate and learn.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format.

Who Should Attend: Crystal Report Developers.

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[7]Course content, details, and timing are subject to change as courses are being developed/finalized.

Background Concepts for All MAX Training – Paid – 2 hours

Category: 00 – Background Concepts.

Course Overview:

This session reviews many different ways of visualizing and thinking about the design of internal supply chains. Understanding this data allows use to see why organizations are setup and run the way they are. This understanding provides an important baseline which allows the learner to see opportunities where what we should be doing doesn't match what we are actually doing. This mismatch provides opportunity for identifying and implementing sustainable improvement.

The material in this course applies across all manufacturing organizations and their internal supply chains, and while detailed system specifications are not presented, the basis for their formulation is provided. Many of the models apply across all manufacturing based ERP systems. This data is fundamental to _all_ MAX Training.[8]

Course Learning Objectives:

Upon successful completion of this course, students will:

- Understand seven different, yet overlapping, methods for how to "see" ERP systems.
- Learn system narratives in various ways so that you are able to explain the system to others.
- Learn the tools used by MAX consultants and begin your journey to think like one.

Course Schedule:

One session with no preparation. Just show up ready to participate and learn.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format.

Who Should Attend: This session applies to all MAX users that need to understand more of the fundamental models MAX is based upon.

MAX Materials Management Workshop – Paid – 9 hours

Category: 05 – Materials.

Course Overview:

This workshop focuses on materials management and concerns of Materials Managers are discussed throughout this course. Materials are a large investment in any manufacturing organization operating an ERP system. Inventories are necessary for many reasons, but must be properly set in proportion to business activity and tightly managed and controlled. Every inventory dollar equates to one less dollar of working capital.

This three session workshop digs into the heart of Materials Management and how to implement it using the MAX Inventory Control module.

Course Learning Objectives:

Upon successful completion of this course, students will:

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[8] For the most part, this data would apply to all ECI Manufacturing Division ERP product lines.

- Understand the set of concerns surrounding the Materials Manager role (whether you are one or not).
- Understanding the use of the MAX Inventory Control module for materials management.
- Be able to calculate the appropriate level of inventory based upon given criterion for a manufacturing organization.
- Be able to perform a Historical ABC Analysis using quantitative and qualitative data.
- Be able to assess total inventory dollars through various stratification and classification methods.
- Understand the fundamentals of inventory accuracy.
- Be able to calculate accuracy given criterion for a manufacturing organization.

Course Schedule:
Registration and Prerequisite Reading Materials
      Material required for the first session will be sent electronically prior to that session.
      Read the material at your own pace, just be ready for the first session.

Session I – Review of setup and operation of the MAX Inventory Control module.
      White paper on use of Stock Identifier field
      Homework: Quiz on section.

Session II – Mathematic of Inventory Management.
      Calculation of how much inventory is appropriate
      Inventory classification and stratification strategies
      Creation inventory targets (budgets). Actual Custom MAX Crystal Reports provided:
            ABC Analysis Crystal Report
            Inventory by ABC Class Crystal Report.
            Safety Stock Analysis Crystal Report
            Obsolete Inventory Crystal Report.
      Designing an inventory reduction program
      Exercise: Performing an inventory analysis on given data
      Homework: Quiz on section.

Session III – Inventory Accuracy – Designing an effective cycle count program.
      Reviewing the Roadmap to Accuracy
      Designing an effective Cycle count program using Control Group counting
      Converting to Process Control counting
      Measuring accuracy.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format. Handouts for calculating the appropriate inventory level and setting inventory targets. Four Custom MAX Crystal Reports to help with process. Cycle count program design handout.

Offer: MAX KPI Trends application @ 40% off for participants in this course.

Who Should Attend: Materials managers, supply chain managers, inventory personnel.

Archive Manager – Free – 1 hour

Category: 07 – Information Technology.

Course Overview:

Archive Manager comes in two flavors; free and paid for. Every MAX user organization owns the free portion that can be used to purge data from your system. Those that want to save, or Archive, that data have the paid version.

In this session we will compare purging and archiving, review some purge and archive facts, review the installation and setup of the module, review the purge and archive process, discuss the two different modes of operation, and present the need for a data retention policy.

Course Learning Objectives:

Upon successful completion of this course, students will:

- Know the process for archiving and purging data using the module.
- Understand the importance of involving the entire business when creating a purge or archive calendar and data retention policy.
- Be able to create a data retention policy and purge and/or archive schedule for your organization.
- Understand the rules for how order centric purging and archiving – sales orders and quotes, purchase orders (all types) and shop orders (including master scheduled).
- Know how to operate the file centric purges and archives.
- Be able to set the screen attributes in order to obtain the desired purge.

Course Schedule:

One session with no preparation. Just show up ready to participate and learn.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format.

Who Should Attend: System administrators.

Training Course Descriptions – December

The following courses have been planned for December. A brief description for each workshop follows.[9]

Basic Demand Planning – Paid – 1 hour

Category: 03 – Scheduling.

Course Overview:

Demand must be captured and then managed so that supply can be scheduled.   At the top of the MAX Order Number Model we find Forecast Orders and Customer Orders, which in theory, represent this demand on the organization far enough out to cover the cumulative lead-time.   Unless you operate in a strict Engineer to Order (ETO) environment, you have both elements of this demand and the combined effect of this demand in a period must be managed.

In this session, we will review a standard model for visualizing the relationship between customer orders and forecasts, over the time horizon, so that the system is scheduled properly.

Course Learning Objectives:

Upon successful completion of this course, students will:

- Understand that demand planning is about the management of customer orders and forecasts.
- Understand the importance of customer orders and forecasts over the cumulative lead-time of the part.
- Be able to describe the Stability Window model.
- Understand the concept of stability and why it is important to your planning system.
- Know how to create planning policies according to the Stability Window.

Course Schedule:

One session with no preparation. Just show up ready to participate and learn.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format.

Who Should Attend: Anyone involved in the planning process (i.e., sales managers, demand planners, master schedulers, planner/buyers, etc.).

Understanding the Shop Floor Workshop – Paid – 6 hours

Category: 04 – Production.

Course Overview:

All higher level plans are executed as planned orders are released to the shop floor. This however, does not mean planning is complete as the Shop Floor Execution module has its own short term planning and control features and functions that load work center queues and provide detailed sequence completion dates. Within the module, the Work Center Detail report is the main tool for coordinating shop floor priorities and getting work done. That can be an excellent report, or it can be another report that doesn't get the job done. Which is it for you?

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[9]Course content, details, and timing are subject to change as courses are being developed/finalized.

To completely understand shop floor control, you need to understand how the Job Progress table, used to produce the Work Center Detail report operates. In this workshop, we will step through the use of Queue vs. Routing Schedule flags, how standard part routing data is translated into order based plans, and how those plans are used for control.

Course Learning Objectives:
Upon successful completion of this course, students will:
- Completely understand the Shop Floor Execution – Reports – Work Center Detail report and how to use it to communicate short-term production schedules.
- Know the critical fields in the MAX Job Progress table that are used to produce work center detail.
- Understand the backward scheduling process.

Course Schedule:
Registration and Prerequisite Reading Materials
  Material required for the first session will be sent electronically prior to that session.
  Read the material at your own pace, just be ready for the first session.
  The balance of the material will be available during the sessions.

Session 1 – Job Progress and Backward Scheduling.
  Work Authorization Concepts
  Backward Scheduling Concepts
  Shop Floor Mathematics
  Setting Sequence Due Dates.

Session II – Managing with the Work Center Detail Report.
  Departments and Work Centers
  Queue, Backlog and Load
  Shop Floor Priority Algorithms
  Basic Communication.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format.

Who Should Attend: Engineering, production and accounting functions, as well as, production managers and supervisors.

Outbound Consignment Model – Free – 1 hour

Category: 02 – Customers.

Course Overview:

In many industries, items are shipped from the manufacturing plant to a distributor network and revenue from those sales orders are not realized until the distributor sells the item. In others, the goods are simply stocked at a customer (i.e., supplier managed inventory) and the customer pays for them when consumed. Both of these situations are referred to as consignment. In a consignment transaction, title to goods on consignment remains with the manufacturer until the sale takes place. A consignment sale is not a true sale until the customer, dealer or agent actually sells the goods; until then title remains with the manufacturer.

This course reviews the four parts to the outbound consignment model: Outbound Material Flow, Management of Consigned Inventory, Sales Flow (consumption), and the Inbound Flow when material is returned.

Course Learning Objectives:

Upon successful completion of this course, students will:

- Understand how consignment was traditionally performed without the module.
- Understand the setup of the MAX Consignment module.
- Understand the consignment model for outbound sales and the basic strategy for managing consigned stock.
- Know how to operate the module to accurately ship, manage consignment inventory, and then either invoice sales or return goods.
- Know the process for entering a consignment sales order and then shipping it to the Consignee.
- Know the process for relieving the inventory at the Consignee and invoicing when the consigned parts are sold.
- Know the process to return unsold consigned goods from the Consignee.
- Understand how to initiate already existing consigned inventory at your Consignees.

Course Schedule:

One session with no preparation. Just show up ready to participate and learn.

Provided: Interactive session with opportunity for questions to be answered. Handout of slides in Adobe PDF format.

Who Should Attend: Sales order processing and sales managers, as well as system designers and accountants.

Other Training and Workshops

Other short topic (1 to 2 hour) training courses, or more in-depth workshops, may be designed based upon customer demand.

Author/Developed By

This program was written by an experienced MAX instructor that is certified as an Associate Instructor by the Association for Supply Chain Management (ASCM), and by ECI Software Solutions as an authority in the MAX Body of Knowledge (BOK).   This adds further value by translating concepts into understandable terms, introducing real-life examples, and providing a human connection to the material.

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