

# MAX Consignment Orders

## Max Consignment Order Entry:

The purpose of the MAX Consignment Order module is to provide a method for tracking inventory that is shipped to a customer on consignment. The items that are shipped remain in inventory and have full visibility in either a customer specific or a generic consignment inventory location. The shipment is assigned an order number which is recorded along with the customer ID in transaction history when the items are shipped (transferred in MAX.)

MAX Consignment Order Entry v3.8.1 - Using Max Database in C:\EXACT\MAX\SAM

Consignment Order Inquiry Print Documents Data Sources Utilities Ship Consignment Order

**Consignment Order**

Order Number: C20878 Order Date: 11/10/2004 Customer ID: 500

Revise Closed Orders

**Bill To:** Default From Stock ID: FGI  
 Hewlett Packard  
 1400 Marietta Way  
 Atlanta GA 78662 USA

**Ship To:** Default To Stock ID: CON  
 Anaheim Distribution  
 7207 La Sierrita Avenue  
 Anaheim CA 90117

Using Application Database: C:\Projects\BPTools\MAX\Consignment\CONSIGN2\consign.mdb

|                    |                |              |                 |                      |
|--------------------|----------------|--------------|-----------------|----------------------|
| Customer PO Number | Terms          | 2% 10 Net/30 | Federal Express | Ship VIA             |
| F.O.B. Point       | Shipping Point | Ordered By   | John Bonham     | Sales Representative |
| Status             | Order Type     | Order No.    | 500             | Customer ID          |
| Closed             |                | C20878       |                 |                      |

| Line | DL | Order Qty | Ship Qty | Part ID | Description/Comments | UNIT | Due Date   | Ent Date   | Pro |
|------|----|-----------|----------|---------|----------------------|------|------------|------------|-----|
| 01   | 01 | 10        | 10       | 11000   | PowerServe 2200      | EA   | 2004-12-27 | 12/27/2004 |     |
| 02   | 01 | 10        | 10       | L1      | LOT TESTER           | EA   | 2004-12-28 | 12/28/2004 |     |
| 03   | 01 | 2         | 2        | S1      | SN TESTER            | EA   | 2004-12-28 | 12/28/2004 |     |
| 04   | 01 | 2         | 2        | LS1     | LOT /SERIAL TESTER   | EA   | 2004-12-28 | 12/28/2004 |     |
| 05   | 01 |           | 0        |         |                      |      | 12/28/2004 |            |     |

Consignment Order Notes

Consignment Order Notes:

HOLD FOR APPROVAL  
 BILL IN 30 DAYS IF NOT RETURNED  
 Per Authorization from Dr. Wim Van Dyke

Ok Cancel

Consignment Order Type Codes

CONS - CONSIGNMENT  
 CONSLT - CONSIGN LONG TERM  
 DEMO - SALES REP DEMO  
 EVAL - EVAL  
 EVAL30 - 30 DAY EVAL  
 EVAL45 - 45 DAY EVAL  
 EVAL60 - 60 DAY EVAL  
 EVAL90 - 90 DAY EVAL  
 EVALLT - EVAL LONG TERM  
 LAB - AMINAL LAB  
 MPT - OLD MPT RESECTION  
 RENTAL - RENTAL  
 RETURN - PRODUCT RETURN  
 SOLD - SOLD GENERATOR  
 TRANS - TRANSFER  
 TRAV - TRAVELING SYSTEM

Cancel OK

## Entering a new order:

1. Select File->New to clear the form if necessary.
2. Select a Customer ID by double clicking on the Customer ID field. A list of MAX customers will display:

Customer List

300 Accel Corporation  
 300 ACE  
 300 Matronic Corporation  
 300 Saturn Automotive  
 400 Magna Corporation  
 500 Hewlett Packard  
 600 Wal-Mart  
 700 Manchester International  
 AC444 ACME STUFF INC.  
 AC445 ACE WFG CORP

Cancel OK

# MAX Consignment Orders

## Shipping Parts under Lot Control:

| Lot    | QC   | EXP        | Qty |
|--------|------|------------|-----|
| M2     | QC:N | 2004-05-16 | 93  |
| M99999 | QC:N | 2004-05-26 | 101 |
| VP100  | QC:N | 2005-03-07 | 101 |
| VP101  | QC:N | 2005-03-07 | 101 |
| VP102  | QC:N | 2005-03-07 | 101 |
| VP103  | QC:N | 2005-03-07 | 101 |
| VP104  | QC:N | 2005-03-07 | 101 |
| VP105  | QC:N | 2005-03-07 | 101 |
| VP666  | QC:N | 2005-03-07 | 101 |

For parts under Serial control, the serial numbers available in the From location will be displayed. If no serial numbers are displayed, then no parts with serial numbers are available from that location. Highlight a serial number and click the add button until all serials have been assigned.

Select a serial under the selected serials display and click the remove button if a serial has been selected by mistake.

When all serials have been assigned, click the Ship Line button to transfer this inventory in MAX.

## Shipping Parts under Serial or Lot and Serial Control:

| Serial/Lot ID | Qty  |
|---------------|------|
| 80001012      | 8000 |
| 80001013      | 8000 |
| 80001014      | 8000 |
| 80001015      | 8000 |
| 80001016      | 8000 |
| 80001017      | 8000 |
| 80001018      | 8000 |
| 80001019      | 8000 |
| 80001020      | 8000 |

For parts under Lot control, the Lots available in the from location will be displayed. If no lots are displayed, then no parts are available from that location. Highlight a lot number and click the add button until all parts have been assigned.

Select the quantity from each Lot:

Please enter the number to take from lot: VP100  
 QC:N EXP:2005-03-07 Qty=101  
 Available = 101

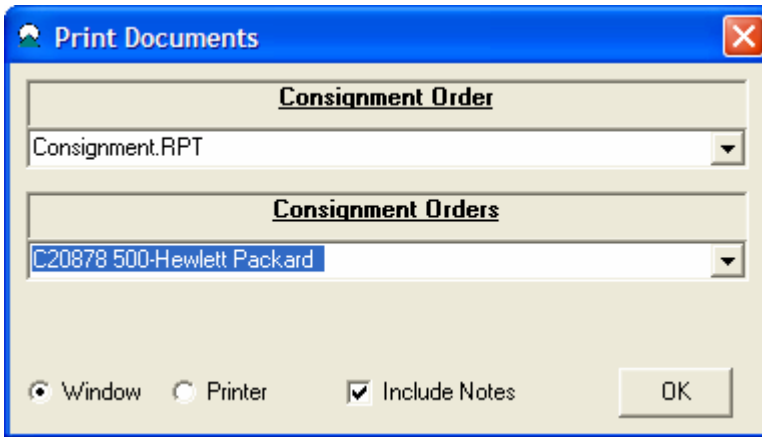
5

When all lots have been assigned, click the Ship Line button to transfer this inventory in MAX.

**Returning Consignment Shipments:** a shipment becomes a return when a matching shipment for the same order has been made to the "From" stock location. If the order or line item is closed (shipped complete) and a return is needed, click on the "Revise Closed Order" and request a shipment.

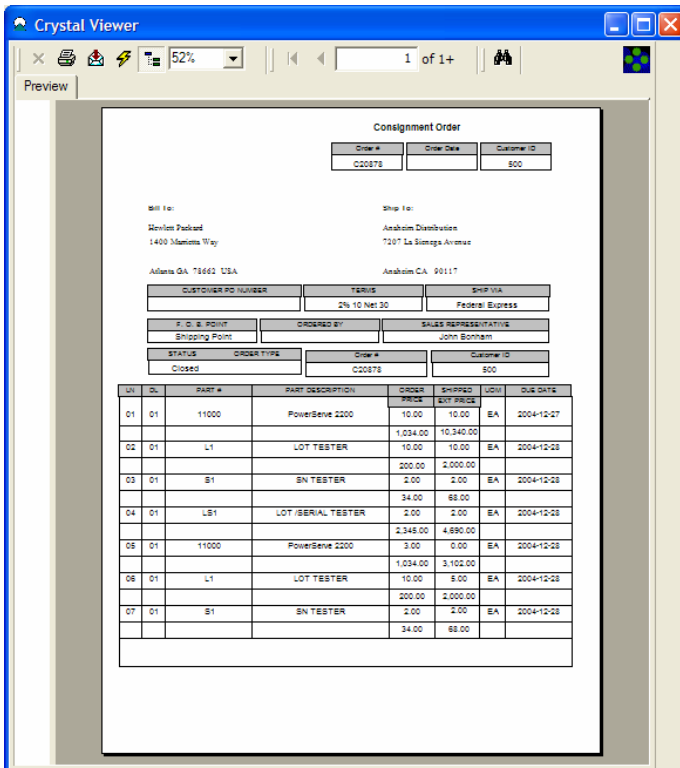
# MAX Consignment Orders

**Documents:** Separate Crystal Reports documents: Consignment, Packing List, Pick List, Labels and Invoice can be printed.



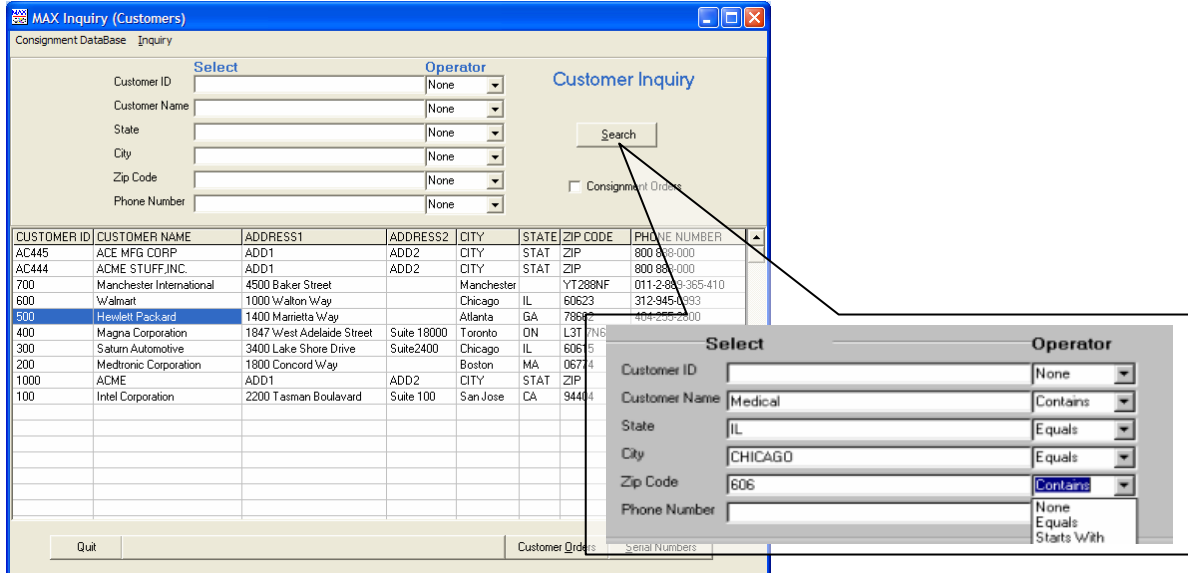
Crystal Templates are provided for each document and can be easily modified.

## Order Template:



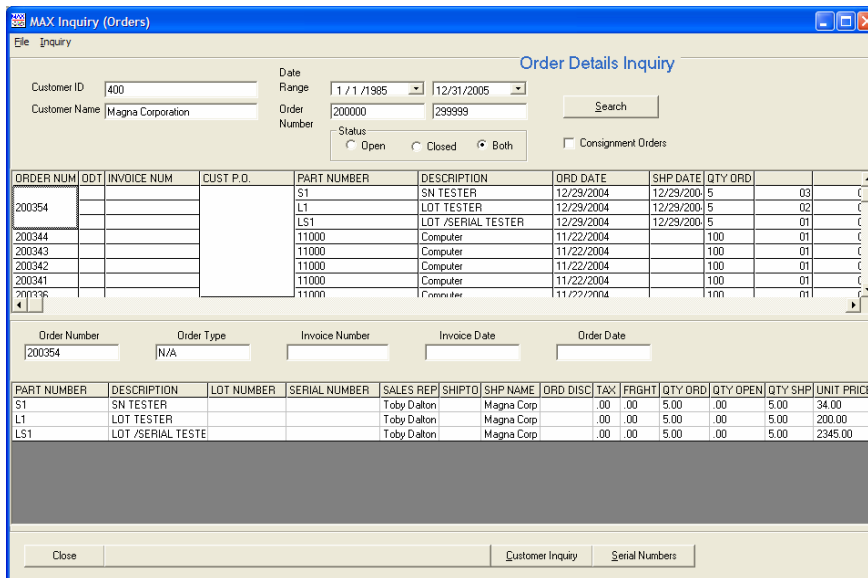
# MAX Consignment Orders

**MAX Inquiry:** the purpose of MAX Inquiry is to provide a flexible query tool for find the customer and their corresponding history details. MAX Query extracts from either MAX Sales Order or Consignment data.



**CUSTOMER INQUIRY** allows you to search your MAX or Consignment data using any or all of the following fields shown above. 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.

**Customer Orders Inquiry:** creates a compact view of all open and closed orders for a specific customer. Users can search the database for orders within a specific date range or order number. Order details and header information are presented in the top window and custom information for a particular order is shown below; in this case Serial Numbers.



# MAX Consignment Orders

**Serial/Lot Inquiry:** allows users to create a list of all product serial/lot numbers and related information for a specific customer. Searches can range in date and order numbers as well. The program gives you the option to search and retrieve all serial numbers within a certain date and order range. In addition, you can search for a specific a Serial and/or Lot Number using Equals or Starts With.

MAX Inquiry (Serial Numbers) Serial Number Inquiry

Customer ID: 400      Date Range: 1/1/1985 - 12/31/2005  
 Customer Name: Magna Corporation      Order Number: 200354 - 200354      Search

Serial Num: All      Status:  Open  Closed  Both       Consignment Order

| PART ID | DESCRIPTION        | LOT NUM | SERIAL NUMBER | ORD NUM | ORDER TYPE | INVOICE NUM |
|---------|--------------------|---------|---------------|---------|------------|-------------|
| S1      | SN TESTER          |         | 8001009       | 200354  |            |             |
|         |                    |         | 8001008       |         |            |             |
|         |                    |         | 8001007       |         |            |             |
|         |                    |         | 8001006       |         |            |             |
|         |                    |         | 8001005       |         |            |             |
| L1      | LOT TESTER         | MANE200 |               |         |            |             |
| LS1     | LOT /SERIAL TESTER | 8000    | 80001016      | 200354  |            |             |
|         |                    | 8000    | 80001015      |         |            |             |
|         |                    | 8000    | 80001014      |         |            |             |
|         |                    | 8000    | 80001013      |         |            |             |
|         |                    | 8000    | 80001012      |         |            |             |

Close      Customer Orders      Customer Inquiry