



July Newsletter

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MAX – There is an App for That

MAX from Exact Software has been in use for about 25 years and over that time a lot of functionality has been added to make MAX a strong platform for controlling and organizing the information required to run a typical medium-sized manufacturing operation. MAX is relatively inexpensive to purchase and offers a very good ROI when implemented properly. MAX works best when it is configured to reflect your operation, but for many reasons this simple objective is sometimes under-achieved.

MAX as a platform will never have all of the functions you may want. The good news is that almost any extra function that would be useful can be added. Four categories of extra functions have been developed for MAX:

1. Alternative User Interfaces – allow users to enter and maintain MAX data from a different UI that may combine steps and/or include extra information.
2. Data Loads – facilitate getting data into or out of MAX.
3. Third Party Integrations – enable the sharing of data with Web Stores, Cad Packages, Payroll Services etc.
4. Work-Arounds – may add functions to workaround or bend the rules imposed by standard MAX.

Case Study: Pallet Control for “Large Foods”

“Large Foods”, new to MAX, wanted to manage inventory in MAX like they manage it physically by receiving, moving, issuing, producing and shipping pallets. The standard MAX solution for pallet control is to use the Lot ID as a pallet ID. This approach has many shortcomings and would not work for them. We added Pallet ID as another inventory layer along with Stock ID and Lot ID which required creating a new table in the MAX database called PartPallet. They decided to use the MAX Data Collection Module to handle all of their inventory transactions, and screens were developed for every required inventory transaction. A major benefit of this approach was the ability to design the user interface (screens) to function as close to physical reality as possible. By scanning the pallet ID attached to every pallet the operators can easily perform transactions. The system can determine everything on a given pallet from the pallet ID.

In addition to the Data Collection screens, a utility called PalletMan was developed to provide pallet inquiries and reports as well as inventory reconciliation and maintenance.

Case Study: Kanban Processing

A busy contract manufacturer came to us and asked about batching their kanban reordering process. They needed something that the buyer/planners could easily use to create purchase orders based on current needs for parts that had been identified for routine re-supply from established and reliable suppliers. The orders for these parts should not require a lot of time or analysis to process. Together we designed an application that the buyers use to identify a list of parts needing to be resupplied. With a few clicks buyers can create new purchase order lines and communicate with the vendors immediately with email.

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In addition to the batch process described above, the MAX Data Collection Module has the ability to create purchase orders, shop orders and inventory move alerts by simply scanning a kanban card.

Case Study: Autodesk Inventor to MAX

A typical requirement is to be able to load parts and product structure information from a CAD package like Inventor. We developed a utility that will load Parts, BOMs, Routings, and Notes from XML documents exported by Inventor. There may be 100's of parts and BOM relationships that can be processed within seconds without the need to enter manually and without the risk of entry errors.

Summary

We look at MAX as having three components: 1) User Interface 2) Database and 3) Rules.

We usually replace the User Interface or create something new, leave the database alone and follow the rules. Wherever possible we will call MAX functions to process transactions and add or change orders, which ensures that the rules are followed just as though the process were performed in standard MAX.

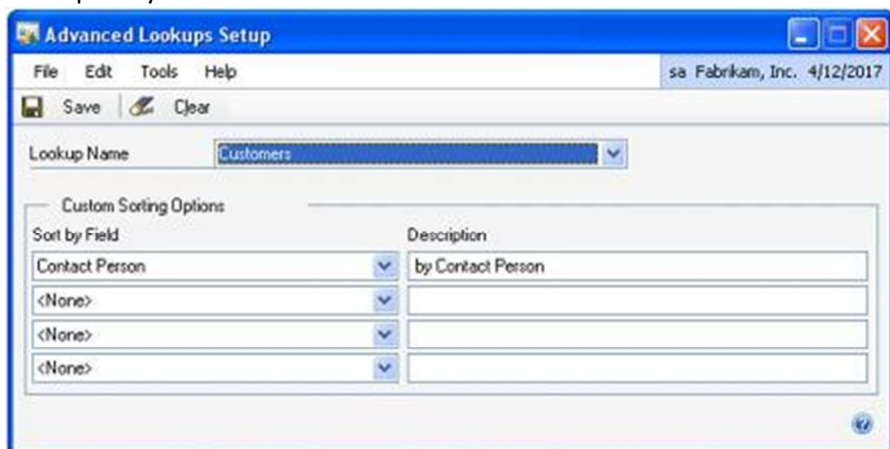
There are many cases where an investment in an extra function for MAX can save a lot of time and expense and move the overall MAX solution closer to what is actually happening on the floor, in the warehouse and in the office. Almost anything is possible.

submitted by Tim Schell

Quick Tip - GP Advanced Lookups

Many GP users regularly want to look up records by a field that is not included in standard GP sorts for that record. For example, they may frequently look up customers by contact name or vendors by city. A standard feature in GP is Advanced Lookups. Advanced Lookups gives you the ability to easily define and save up to four lookups per record type per company. The Advanced Lookups will appear in the second section of the Additional Sorts window.

To define an Advanced Lookup go to Tools > Setup > Company > Advanced Lookups. Select the type of record you want to create the Advanced Lookup for from the Lookup Name dropdown list. In the Sort by Field, select the desired sort. The description will default to "by..." but you can edit it to any description you want.



Click Save and your new Advanced Lookup will appear in the Additional Sort dropdown menu.

Balance Point Technologies, Inc. provides applications, custom development, and consulting for MAX through Exact Software.