

## May 2010 Newsletter

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## Supply Chain Management and MAX

According to research by Accenture, the supply chain can account for between 50 percent and 70 percent of a manufacturer's total cost of doing business and more than 50 percent of its assets. MAX offers several modules to improve supply chain management, including **Advanced Forecast** and **Supplier Kanban**.

**MAX Advanced Forecast** is designed for companies that utilize forecasts to determine the balance between demand for their product and their ability to generate sufficient supply in order to meet that demand. It helps assemble and consolidate forecasts and then applies rationalizing statistical forecasting techniques to develop forecasts that resemble reality. The modified forecasts are compared to actual bookings, and the consumed (or net) forecast orders are automatically loaded into MAX.

You can use weekly forecast quantities and spread them to daily buckets which allow rate-based schedules that feed into Repetitive or orderless scheduling and execution. To see how well you've done, you can use MAX Advanced Forecast to help you compare the planned versus actual with user-defined criteria so you can adjust your future activities and build the right products at the right time.

Advanced Forecast allows you to provide long-term material requirements to your suppliers so they can plan for your Kanban pulls, or it can drive long lead time items for MRP processing for parts not suitable for Kanban replenishment.

**Supplier Kanban** can significantly reduce the time and effort required to replenish inventory, allowing management to focus on exceptions rather than redundant tasks and reducing material problems that interrupt the manufacturing process. When the need arises for a part, you process the Kanban card by scanning it or keying in the data. MAX knows the vendor and the Re-order Quantity and will generate a purchase order and automatically e-mail it to the vendor. Purchase orders can be sent immediately or grouped and sent once per day. Supplier Kanban can perform validations and if an order fails any of the validation rules, an e-mail is sent to the buyer/planner alerting them of a request that should be reviewed.

Supplier Kanban can reduce inventory by eliminating the time between the requirement for a part and the placement of a PO.

## MAX Toolbar for GP to be Released in June

MAX Toolbar for GP extends the GP user's ability to view MAX data and adds the ability to maintain Customer, Vendor, payment terms, shipping methods, and sales person data in multiple MAX databases from within GP. MAX Toolbar for GP is the progressive evolution of MAX Drillbacks to enable the GP user to perform the financial tasks from a single application.

MAX Toolbar for GP gives users the ability to setup links to multiple MAX databases. When performing an inquiry or updating master records, the user can select which MAX databases to access.



Companies with multiple MAX databases integrating into a single GP database can now easily maintain Customers, Vendors, payment terms, shipping methods and sales persons across the multiple MAX databases from a single location.

In addition to the ability to maintain MAX records, other functions that have been added include the ability to restrict a MAX GL inquiry by part number, and the ability to view MAX purchase orders.

MAX Drillbacks users current with CSP will receive MAX Toolbar for GP as a benefit of their CSP plan. Special pricing is available for new users through June 30, 2010. Contact your Exact account manager for more information.

## MAX, almost but not quite?

MAX is a powerful and flexible ERP application with rock solid functionality, but does it come just a little short of meeting your exact business requirements? Could your productivity be improved if MAX could do more for you? No ERP solution can meet all of the unique requirements of every business and that is why hundreds of MAX users have purchased MAX add-on tools or had custom applications developed for them. These users have shared some of the same objectives:

- Increase productivity
- Improve customer service
- Reduce costs

Existing add-on tools range from inexpensive utilities to help manage the MAX database to full-fledged modules that streamline or expand processes. Here are some of the more popular utilities.

MAX ID Changer - Gives users the ability to change Customer, Vendor, or Part ID's wherever the ID exists in the MAX database. You can change a single record, a list of records, or all records while maintaining the integrity of the data in MAX.

SuperZap - Gives users the ability to delete Customers, Vendors or Parts and all related transaction records.

Inventory Mover - Moves all inventory, including serial and lot controlled items from one stock room to another.

BOM Loader - Loads MAX Bills of Material from a spreadsheet, including reference designators.

Custom applications have included automating the entire replenishment process, from component part procurement to automated generation of work orders, as well as many applications that extend far beyond MAX. If there is a process you would like to streamline, automate, or expand, contact us to discuss what you would like the process to do for you. We will be happy to review your objectives and propose a solution. Feel free to email [tschell@bpttechnologies.com](mailto:tschell@bpttechnologies.com) or [joneal@bpttechnologies.com](mailto:joneal@bpttechnologies.com).

More information on MAX Tools and Utilities is available at [www.maxtoolkit.com](http://www.maxtoolkit.com).

# Microsoft Dynamics GP 2010

## The New Way to Do Business

Microsoft has just released the latest version of Dynamics GP—GP 2010. The upgrade to GP 2010 from previous versions will be available in June, and Service Pack 1 is planned for August. Exact currently plans to release the integration from MAX to GP 2010 in September. An integration between GP and Synergy is also in the design stages, enabling Synergy users to view data stored in GP.

Microsoft Dynamics GP 2010 makes it easier for people to work faster and smarter. Employees can make rapid, informed decisions and take action with enhanced insight that is personalized, simple to access, and extended across the organization through familiar Microsoft Office applications. In addition, this release continues to remove barriers that get in the way of working effectively to better connect people, information, and processes across applications and systems.

*“Driving Personal Productivity” is truly a personalized experience.*

*Users can tailor their action panes with lists that give them the precise information they need for their roles and lines of business, whether they are getting it from locations within Microsoft Dynamics GP or from other data sources. And since the goal is to make it easier to do business, lists can be set up to filter out information that’s not relevant to the task at hand.*

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Watch for more information and webinars about GP 2010 as the release of the integration with MAX gets closer.

## Quick Tip: GP Account Rollup Inquiry

The Account Rollup Inquiry is one of my favorite underused functions in GP. The Account Rollup Inquiry displays summarized period balances for user defined ranges of accounts that do not have to be sequential. To define your rollup inquiry you select segment ranges that include the information you want to summarize. For example, assume your chart of accounts is set up with four segments: Division, Department, Account, and Sub-Account. You could create an account rollup inquiry option to summarize travel expenses that exist in multiple accounts for a group of departments across several divisions.

You can set up an account rollup inquiry option that includes multiple ranges for each segment. For example, you could create an option that included information for departments 100, 200, 400, and 700, and accounts 1000 through 1400, and 2700 through 2900.

The Account Rollup Inquiry window can display up to four columns of information. You can set up an option to display actual amounts, previous year balances, and budget amounts. You can also display columns that show the results of simple calculations—for example, the difference between actual amounts and budgeted amounts.

For more information about setting up an Account Rollup Inquiry, see **Creating an account rollup inquiry option** in the Microsoft Dynamics GP Online Manual, or feel free to contact us.

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

Period	Actual	Budget	Prior Year	Budget - Actual
Beginning Balance	\$0.00	\$0.00	\$0.00	\$0.00
Period 1	\$21,957.10	\$30,000.00	\$0.00	\$8,042.90
Period 2	\$39,119.43	\$30,000.00	\$0.00	(\$9,119.43)
Period 3	\$0.00	\$30,000.00	\$0.00	\$30,000.00
Period 4	\$0.00	\$30,000.00	\$0.00	\$30,000.00
Period 5	\$0.00	\$30,000.00	\$0.00	\$30,000.00
Period 6	\$0.00	\$30,000.00	\$0.00	\$30,000.00
Period 7	\$0.00	\$30,000.00	\$0.00	\$30,000.00
Period 8	\$0.00	\$30,000.00	\$0.00	\$30,000.00
Period 9	\$0.00	\$30,000.00	\$0.00	\$30,000.00
Period 10	\$0.00	\$30,000.00	\$0.00	\$30,000.00
Period 11	\$0.00	\$30,000.00	\$0.00	\$30,000.00
Period 12	\$0.00	\$30,000.00	\$0.00	\$30,000.00
Total	\$61,076.53	\$360,000.00	\$0.00	\$298,923.47