

Balance Point Technologies, Inc.
www.maxtoolkit.com

MAX Shop Paper

User Guide

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Purpose

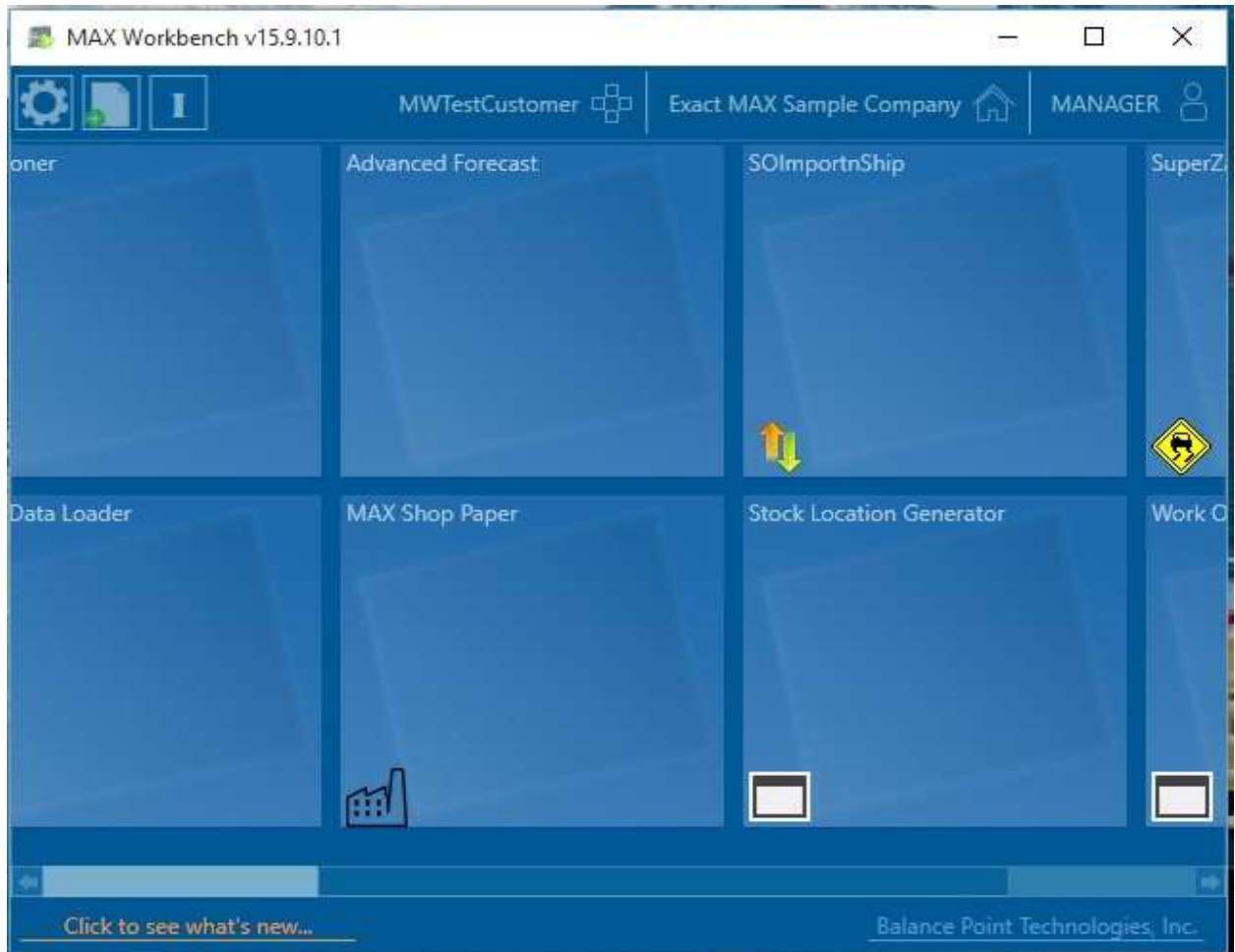
MAX Shop Paper provides the ability to print different types of work order documentation such as pick list, routing list, labels, drawings and other. Some of the supported file formats for printing are crystal reports, office word/excel files, pdf and dwg files (requires eDrawing viewer).

Minimum System Requirements

- .NET Framework 4.5
- EXACT MAX Software v5
- SQL Server 2008
- Crystal Reports Runtime

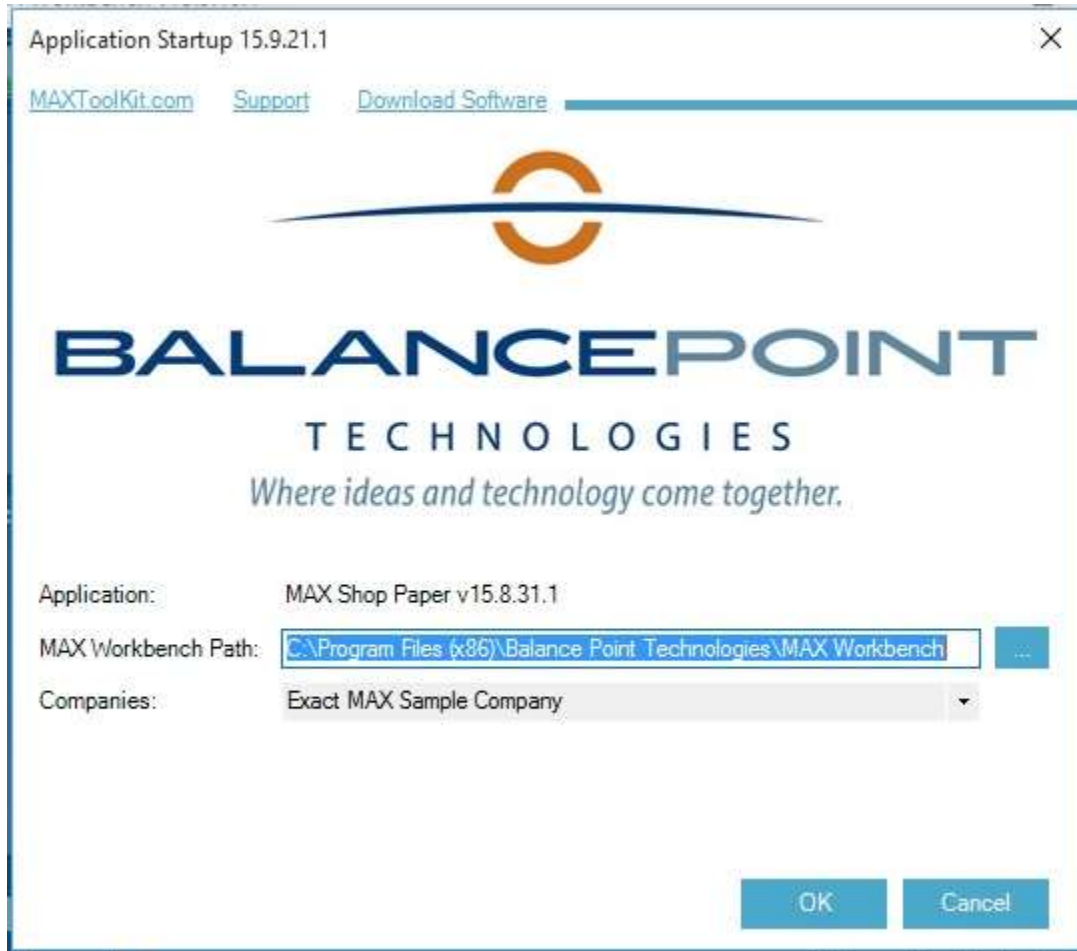
Installation

- MAX Shop Paper is automatically downloaded and installed by MAX Workbench. After a successful installation, an icon will be added on the main window of MAX Workbench.

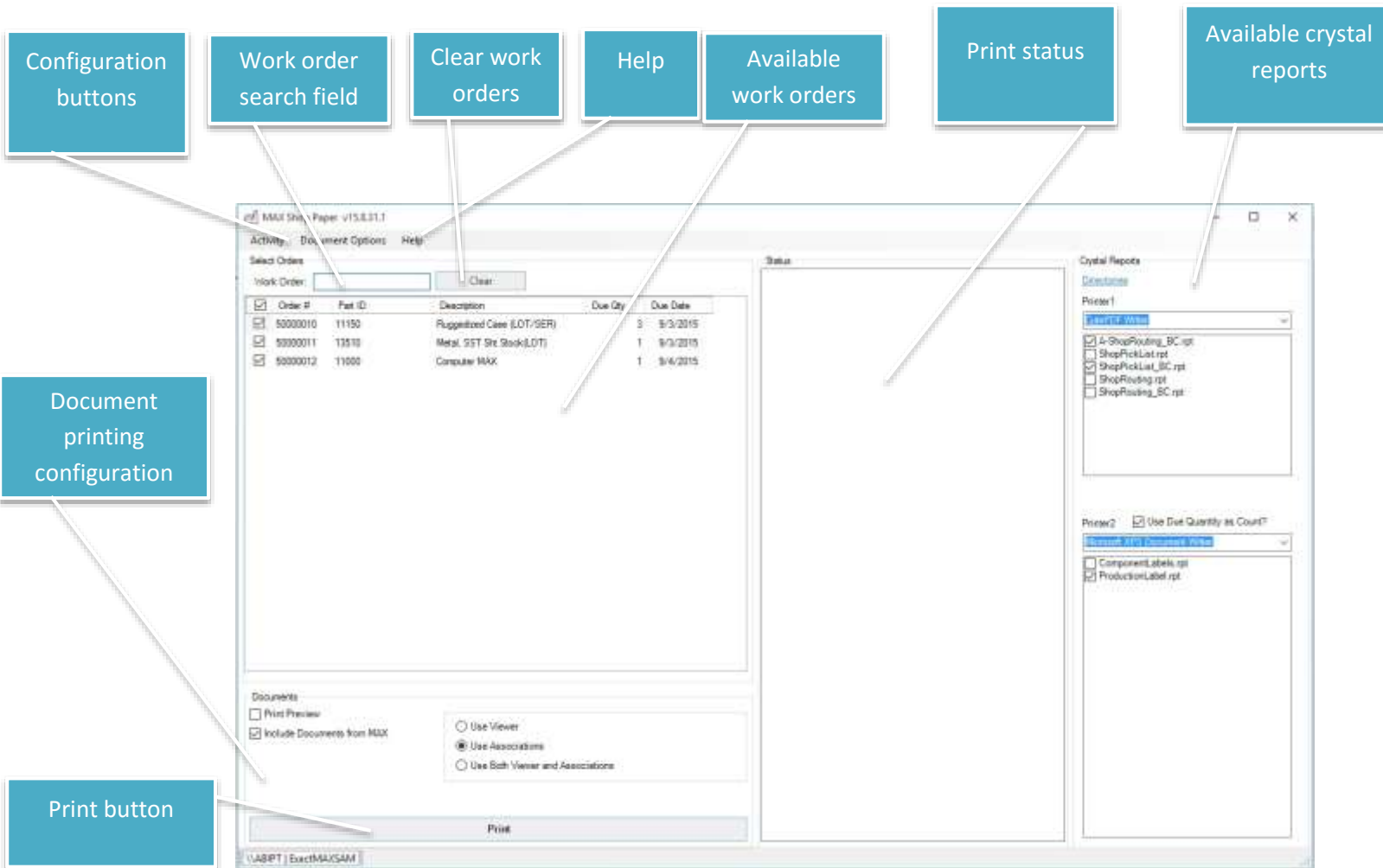


Settings Configuration

- Click the MAX Shop Paper icon on the main window of MAX Workbench to launch the application. The MAX Shop Paper login window displays.
- Database connection settings are determined after a company selection has been made on this screen.
- Select a company from the Companies dropdown and click OK to proceed to the main window of MAX Shop Paper.



Main Window



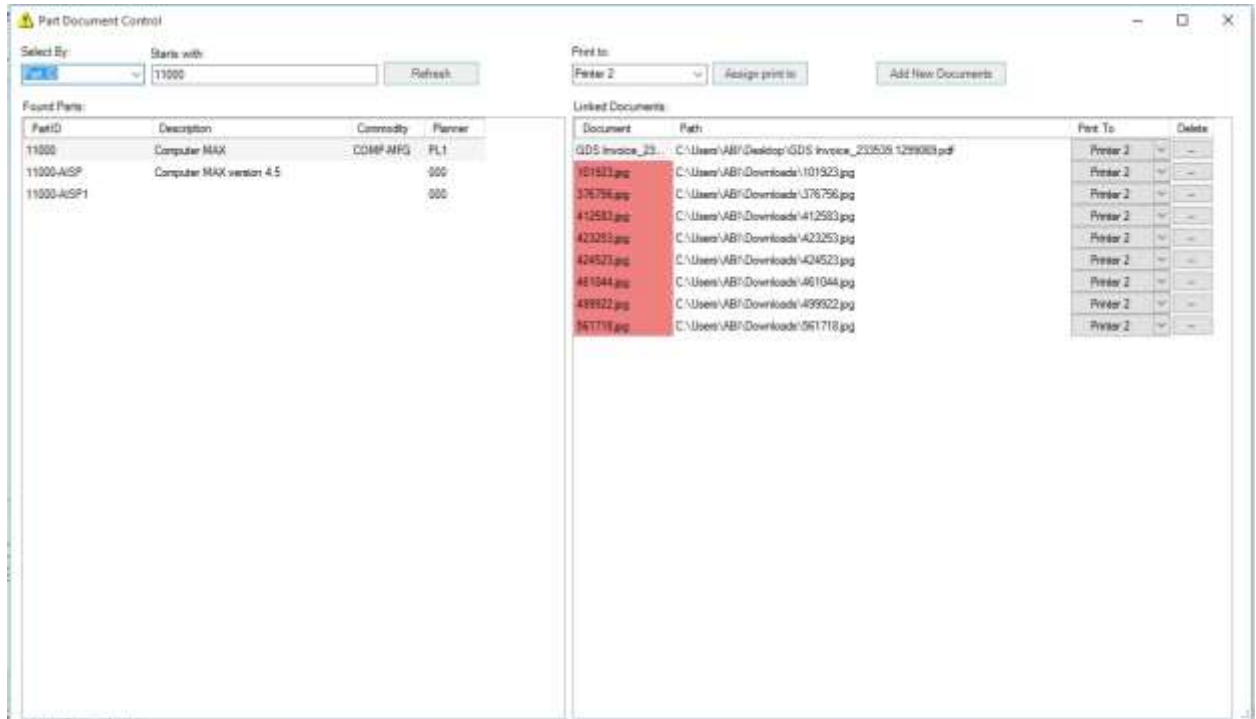
- There are three buttons on the configuration button menu at the very top of the application window – Activity, Document Options and Help

Crystal Reports Folder

Click Activity -> Preferences to see the path of the crystal reports folder.

Part Document Control Options

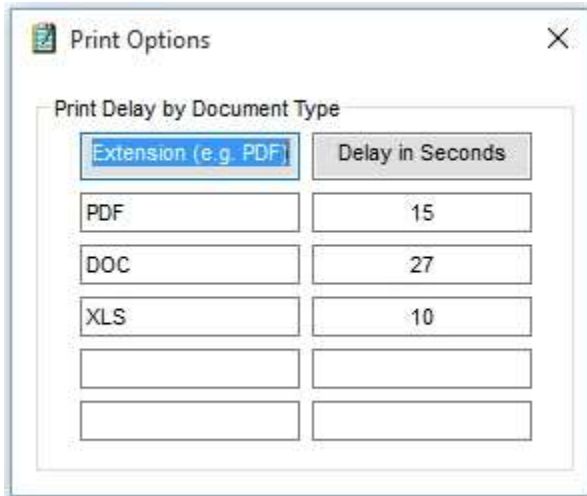
Click Document Options -> Print To to open the Print To/Part Document Control Options dialog. This dialog allows us to find a part and assign/unassigned documents to the selected part.



- a) To find a part, select a search option from the Select by dropdown, enter a value in the Starts with text field and click the refresh button. All parts matching the search criteria will be loaded in the Found Parts section.
- b) To view the assigned documents of a part, click on the part. All of the assigned documents will be displayed in the Linked Documents section on the right.
- c) To open an assigned document double click on the Document column
- d) To replace an assigned document with a different one, double click on the path column, select the desired document and click Ok.
- e) To delete an assigned document, click on the Delete button for that assigned document
- f) To assign a printer to all part document, select the printer from the Print to dropdown and click the Assign print to button
- g) To add new document/s, click on the Add New Documents button, select the document/s you would like to assign to the selected part and click OK.

Document Delays

Click Document Options -> Document Delays to open the Document Delays dialog. This dialog allows us to specify a delay (in seconds) in printing per document type.



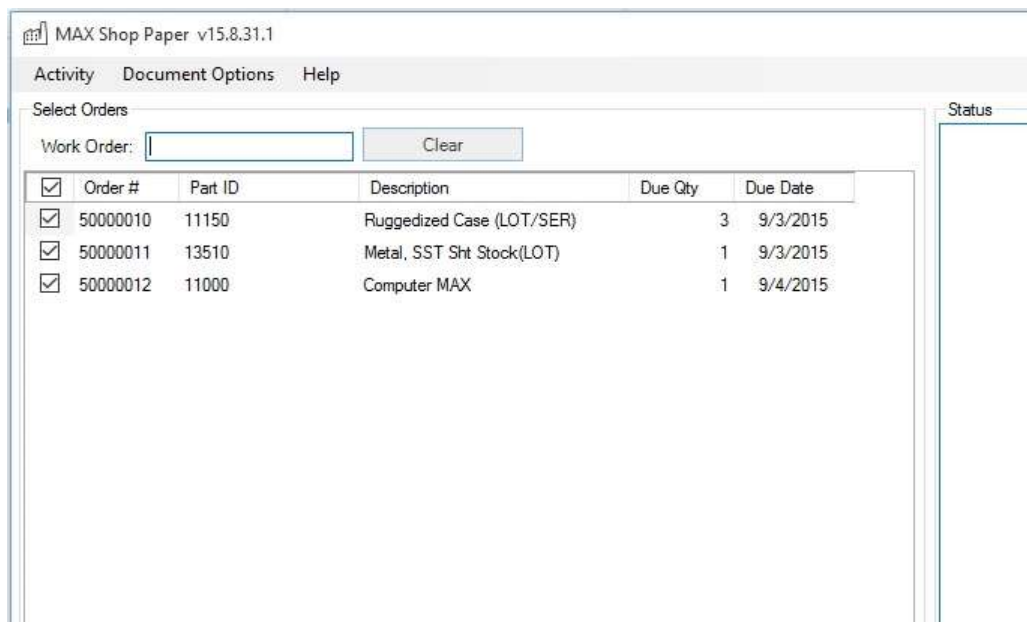
Help

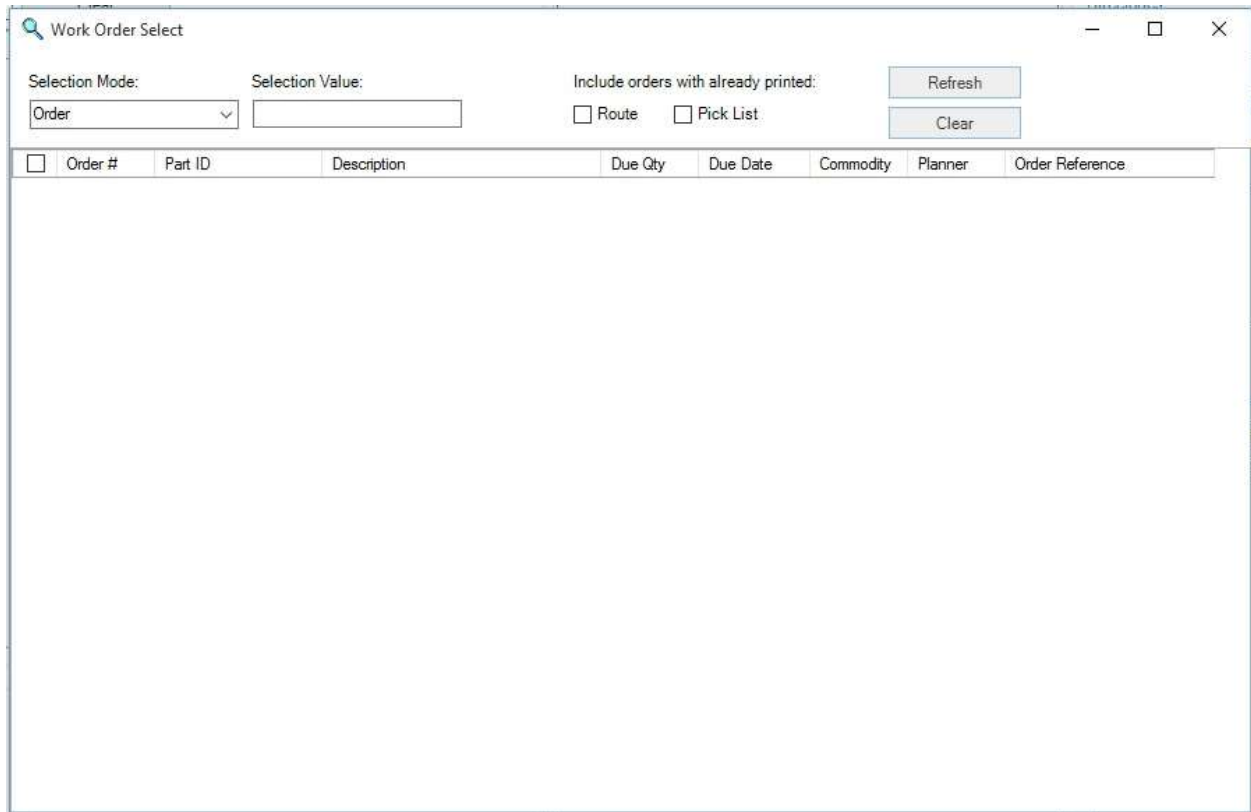
There are two options in the Help menu

1. Support – will take you to the Balance Point Technologies support site
2. User Guide – will open the MAX Shop Paper user guide

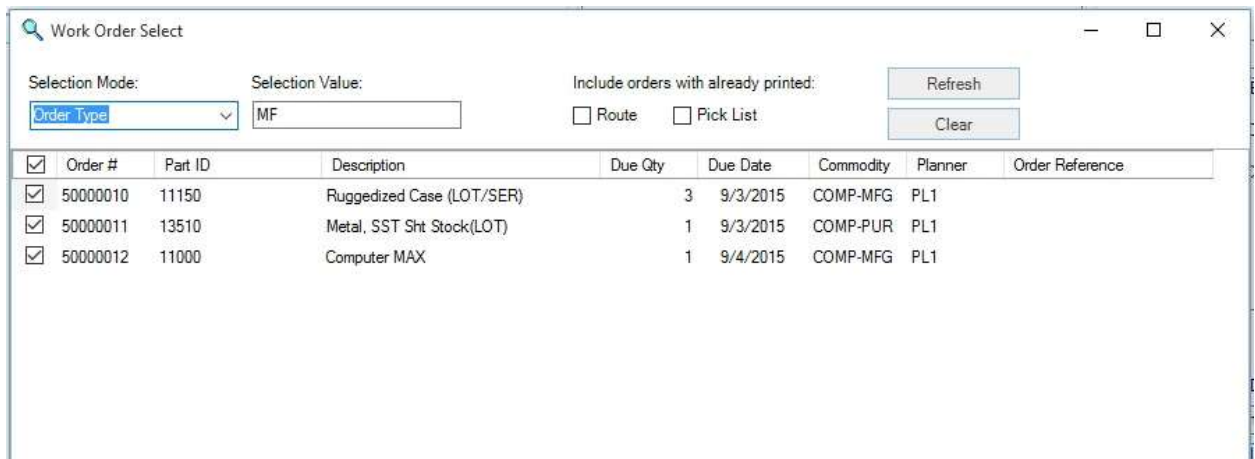
Order Selection

Double click on the work order text field to open the work order selection window





- Select the selection mode by selecting an option from the Selection Mode dropdown
- Enter a value in the Selection Value text field and click the refresh button. All matching orders will be displayed on the screen. They will be selected by default. Simply, close the window and all selected orders will be ready for printing on the main window.



- To include orders with already printed route or pick list, check the Route or Pick list check box.

Printing Documentation



Documents

Print Preview

Include Documents from MAX

Use Viewer

Use Associations

Use Both Viewer and Associations

- Select the orders for which you would like to print documentation
- In the Documents section, specify if you would like to use Print Preview or include documents from MAX that have been associated with the work order parts.
- Include Document from MAX contains three options
 1. Use Viewer – will use the viewer of the associated document to open it up and display it to the screen.
 2. Use Associations – will print additional documents associated with the parts that are part of the work order
 3. Use Both Viewed and Associations - will use the viewer of the associated document to open it up and display it to the screen and will print additional documents associated with the parts that are part of the work order.

Selecting Order Documentation

- In the Crystal Reports section of the main window the user has the option to select up to two printers. Multiple reports could be selected for each printer. Every selection in this section will be remembered and reloaded the next time MAX Shop Paper is started.
- If the user is printing labels, the user could check the Use Due Quantity as Count Checkbox. This option will tell Shop Paper to print as many labels as the due quantity of the associated work order pat.