

30 Tools in 50 Minutes

Jim O'Neal



Jim O'Neal

- ▶ Co-founder of Balance Point in 1996
- ▶ CEO
- ▶ FMC, ZFNA
- ▶ Design, Integrations, FIM, GP
- ▶ joneal@bpttechnologies.com
- ▶ (847) 265 3797

Objectives

- ▶ See what is possible
- ▶ Briefly discuss custom development projects that have provided significant productivity gains
- ▶ Discuss a few standard tools from MAXToolkit.com

High Volume Distribution

- ▶ Sales orders originate in Dynamics CRM
- ▶ Many orders are prepaid with a credit card in CRM
- ▶ Multi-currency
- ▶ Tracking in GL region of world shipped to
- ▶ Nearly every item is lot tracked
- ▶ Average 12 lines per orders > 20 pieces per line
- ▶ CRM requires update after shipment

Solution 1: Integration of CRM SO to MAX

- ▶ CRM creates file of approved sales orders
- ▶ Custom service monitors CRM file
- ▶ Performs a number of field translations
- ▶ Creates sales order in MAX
- ▶ Extensively use MAX Order Master and Order Detail User Designed Fields

Solution 2: Picking and Shipping Application

- ▶ Display of unshipped orders by due date, customer type, ship method for selecting and printing a batch of pick lists
- ▶ Grocery store checkout type order verification Lot number of each piece scanned verifying part number and quantity
- ▶ When packed they click a ship button that prints packing list, ships in MAX, and sends the package info to the shipping application Shipping labels are printed
- ▶ Shipment info returned to CRM
- ▶ Ship notifications sent to customer with Document Manager
- ▶ Invoices emailed to customer with Document Manager

Solution 3: GP Updates

- ▶ After posting from MAX and before posting in GP credit card orders are updated with the cc payment
- ▶ All sales posted to the same GL account At month end sales are reclassified based on the region of the world shipped to

Solution 4: Auto-ship and Post Credits

- ▶ A custom service monitors for credits in MAX and auto-ships them and auto-posts them

Webstore Connections

- ▶ One way and two way integrations from webstores
- ▶ Magento, FoxyCart, Shopify, and custom
- ▶ XML and API
- ▶ Conditions for free freight, rush charges, multiple MAX line items from a single webstore item
- ▶ Add new, update existing customer records in MAX

Vendor Managed Inventory

- ▶ Company has a high number of high volume components—seals, bearings, fasteners, hoses
- ▶ Vendors manage the replenishment using on-site quantity checks and company supplied reports
- ▶ Vendors ship in their own systems
- ▶ Problem—Nothing in MAX to receive against

Solution: MAX Automated Receiving System

- ▶ Vendor submits shipment information via ASN
- ▶ MARS reads ASN and writes data to custom table
- ▶ On receipt clerk enters shipment number into MARS and the contents are displayed Counts are verified and shipment is inspected Variances generate notifications
- ▶ Clerk accepts shipment MARS creates a PO line for each shipment line and receives it

Invoicing for Engineering Time

- ▶ Company performs over 100 small engineering jobs per month
- ▶ Job time and details kept in external system

Solution: Sales Import and Ship

- ▶ At month end details of engineering jobs are exported
- ▶ Imported into MAX as sales orders and auto-shipped
- ▶ After invoice edit sales orders are posted and invoices emailed to customers with Document Manager PDFs of invoices saved in db

Provide MAX Invoices with GP Statement

- ▶ Customer needed to create GP AR statement and send copies of MAX invoices with statements

Solution

- ▶ Created GP Statement ID with output to XML file
- ▶ Read XML file and retrieve PDF invoices from db
- ▶ Email statement and invoices to customer with Document Manager

MAX Integrations with Enterprise ERPs

- ▶ SAP, PeopleSoft, Baan
- ▶ Manufacturing in MAX in all cases
- ▶ SOP in large ERP and transferred down
- ▶ POP in MAX and large ERP
- ▶ Inventory balances managed in MAX and in large ERP

Inventory Transactions

- ▶ Inventory Mover Uses a cross reference file to move everything in a location to a new location
- ▶ Zero Inventory Does an unplanned issue for all inventory in a location

Automated Replenishment Supply

- ▶ Parts coded in part master as ARS
- ▶ ARS analyzes requirements and supply up to the specified date
- ▶ If there is a shortage ARS generates order based on rules in MAX
- ▶ Email purchase orders sent to vendors

Post Order Closure

- ▶ Set parameters
- ▶ Auto close completed shop orders where variances are within the set parameters

Annual Equipment Recalibration

- ▶ Company manufactures equipment that should be recalibrated each year
- ▶ Recalibrating the equipment is a revenue opportunity

Solution: Automated Notifications and Followup

- ▶ Proposal: Create an equipment file. Auto populate the file based on invoices
- ▶ Use Document Manager to send multiple notices to customer regarding the need to recalibrate

Document Manager

- ▶ Automates the document distribution process
- ▶ Email, print or text
- ▶ Sales documents, purchase orders, or reports,
- ▶ Send alerts based on any condition in MAX that can be defined
- ▶ Update MAX fields based on defined conditions
- ▶ Access multiple databases

Advanced Forecast

- ▶ Easily enter forecasts into MAX
- ▶ Easily delete old forecasts
- ▶ Compare forecasts to actual sales
- ▶ Roll unconsumed forecasts into the next forecast period

Kanban

- ▶ Re-order purchased parts by scanning a Kanban card

More Opportunities!

- ▶ February 19th – March 31st, 2018
- ▶ Software price only.



Software Promotion

March 8 1:00	30 Tools in 50 Minutes
March 15 3:00	Data Collection
April 10 11:00	Announcing Shop Pulse VPoint—A New Graphical Production Monitoring and Scheduling Tool
April 19 1:00	The Fastest and Easiest Way to Import and Maintain your MAX Data
	GP Features and Functions - You Already Own but Didn' t Know About
	Shop Pulse
	GP Essential Applications Everyone Should Own Plus A Few To Meet Unique Requirements
	Process Automation for Materials and Manufacturing
	Connecting MAX to the World - Automating Sales Order Processing Functions

Educational Webinars

Sponsoring Complimentary Solutions

Find literature in the **mpower** Meet Up



Questions?

Name Jim ONeal

Email Info@bpttechnologies.com

Email Subject mpower Question
