

MAX Consignment Orders

Users Manual

Version 2008 for SQL server

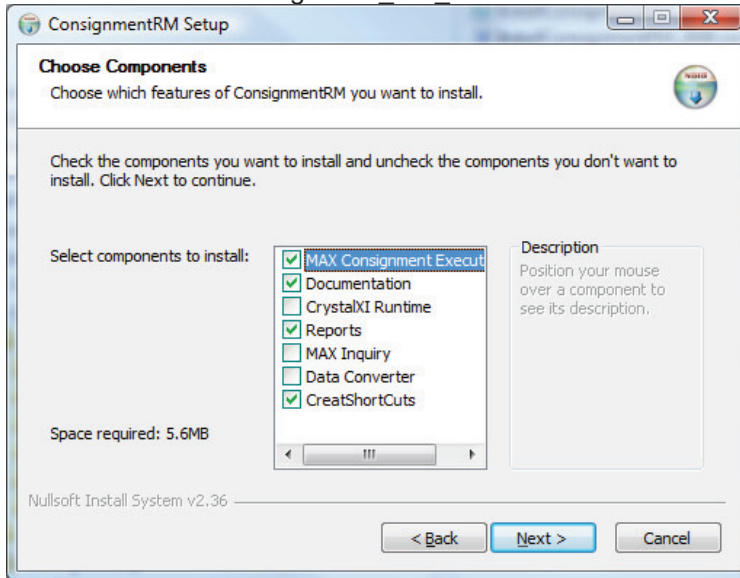
Standard Configuration

MAX Consignment Order Processing

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Installation

1. Run InstallRMConsignment_RM_2008.EXE and follow the prompts:



2. Consignment uses MAXUpdate for processing inventory transfers. MAXUpdate is a set of DLL's that provide a library of MAX functions.

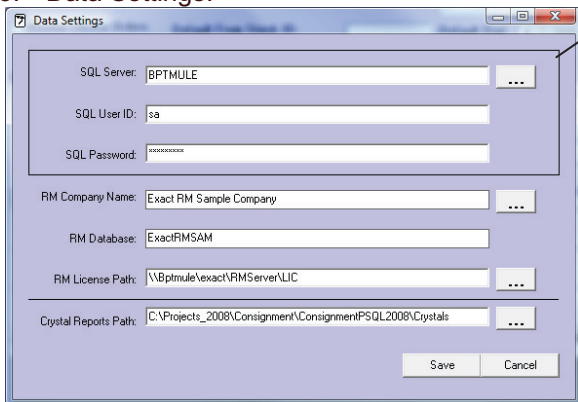
MAX DLL'S
MAXEXEC2 DLL
MAXTRAN2 DLL

These MAX function library files need to be available to the Consignment application on order to process Consignment Shipments.

Make the following MAXUpdate files available from a search path.

These files will be installed by the MAX Client Setup routine in \RMClient\EFW. As MAX is updated it is important to also update the files that are used by the Consignment application.

3. Data Settings:



Data Sources:

- 1) Server
- 2) User ID and Password
- 3) Company Name
- 4) Database name is display only and will show when the company is selected.
- 5) License path
- 6) Crystal Reports (Documents) Path – this will default to \Crystals within the application folder.

MAX Consignment Order Processing

Converting from Pervasive Database: Consignment for MAX SQL Server does not have a separate database from MAX like it does with Pervasive. If you are migrating from MAX pervasive to MAX SQL Server you will need to convert the Consignment data if you have been using Consignment Orders.

Data Conversion: select data conversion on the Installer form. When you Install Consignment, a shortcut will be placed on the desktop for the conversion called: "ConsignmentRM_DataConverter" Before you run this data conversion utility you will need to start the Consignment application first to create the Consignment tables in the MAX database.

ConsignmentRM Data Conversion Utility

ExactRM Connection Values

SQL Servers: bptmule

User ID: sa

Password: xxxxxxxx

Company: Exact RM Sample Company

DataBase: ExactRMSAM

Consignment Database (for Pervasive MAX)

DSN: TA RULES

User ID:

Password:

Enter the MAX Server, User, Password, and company.

Enter the DSN, User and password for existing Consignment data to be copied.

Copy Data

Menu Functions

Consignment Order

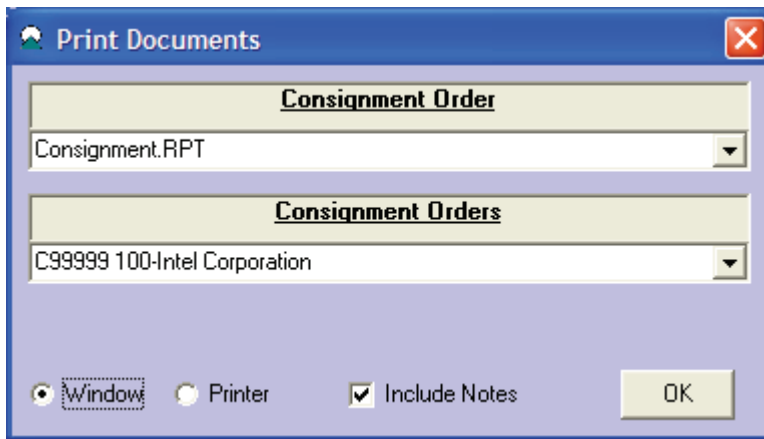
1. New Consignment Order – assign the next order number and clear screen for customer selection.
2. Save Consignment Order
3. Delete Consignment Order
4. Delete Selected Line

Print Documents

1. Consignment Order
2. Packing List
3. Pick List
4. Shipping Labels
5. Invoice

The Crystal Reports that are included are intended to be templates for creating production versions.

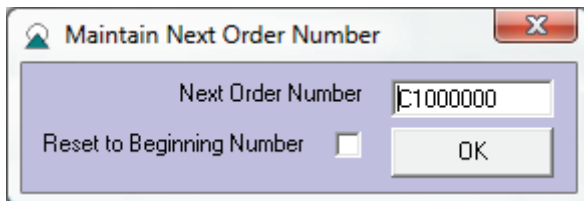
The Document Request form allows for selection of a specific Crystal Report for each document and will remember the name if changed by user. If no current Consignment Order is active the Consignment Orders browse will be visible.



Utilities

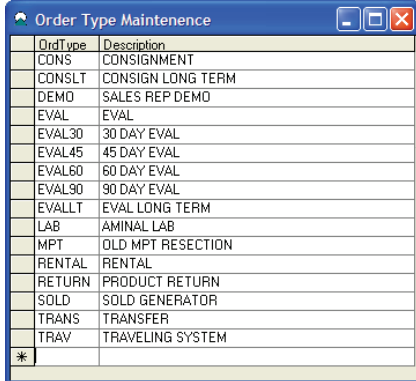
Maintain Next Order Number:

The order number is a eight-character field. It should either begin with the letter “C” or be entirely numeric for proper application operation.



MAX Consignment Order Processing

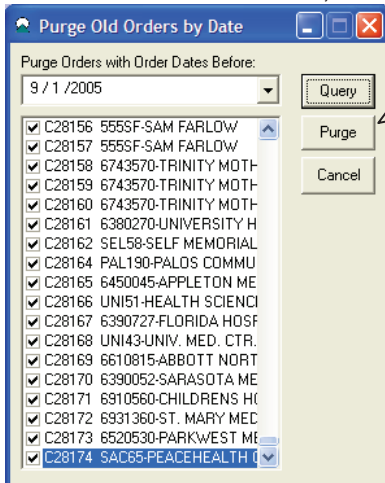
Maintain Order Type: The order type and description are user-defined fields unique to consignment. They can be added, deleted and updated, even while in the middle of an order. The order type has a limit of six characters and description is fifteen by default.



OrdType	Description
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
*	

The order type field is stored in the "consign.mdb" file and the UDFKEY in MAX's "Lottrk.dat" file. These fields can be used to create custom Crystal Reports.

Purge Old orders by Date: This function will purge all closed orders prior to the entered date. If 9/1/2000 is entered, then orders with order dates of 8/31/2000 and prior will be cleared.



Purge Orders with Order Dates Before:

9/1/2005

Query

Purge

Cancel

<input checked="" type="checkbox"/>	C28156	555SF-SAM FARLOW
<input checked="" type="checkbox"/>	C28157	555SF-SAM FARLOW
<input checked="" type="checkbox"/>	C28158	6743570-TRINITY MOTH
<input checked="" type="checkbox"/>	C28159	6743570-TRINITY MOTH
<input checked="" type="checkbox"/>	C28160	6743570-TRINITY MOTH
<input checked="" type="checkbox"/>	C28161	6380270-UNIVERSITY H
<input checked="" type="checkbox"/>	C28162	SEL58-SELF MEMORIAL
<input checked="" type="checkbox"/>	C28164	PAL190-PALOS COMMU
<input checked="" type="checkbox"/>	C28165	6450045-APPLETON ME
<input checked="" type="checkbox"/>	C28166	UNI51-HEALTH SCIENCI
<input checked="" type="checkbox"/>	C28167	6390727-FLORIDA HOSF
<input checked="" type="checkbox"/>	C28168	UNI43-UNIV. MED. CTR.
<input checked="" type="checkbox"/>	C28169	6610815-ABBOTT NORT
<input checked="" type="checkbox"/>	C28170	6390052-SARASOTA ME
<input checked="" type="checkbox"/>	C28171	6910560-CHILDRENS HI
<input checked="" type="checkbox"/>	C28172	6931360-ST. MARY MED
<input checked="" type="checkbox"/>	C28173	6520530-PARKWEST ME
<input checked="" type="checkbox"/>	C28174	SAC65-PEACEHEALTH C

1. Select a date to purge from (inclusive)
2. Click on "Query" button to see the affected orders.
3. Review orders – uncheck to preserve the order.
4. Click "Purge" button when ready.

MAX Consignment Order Processing

Data Entry Forms

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.)

Line	DL	Order Qty	Ship Qty	Part ID	Description/Comments
01	01	1	0	11000	PowerServe 2299
02	01	1	0	12100	System Unit
03	01	1	0	13800	Printed Circuit Board
04	01		0		

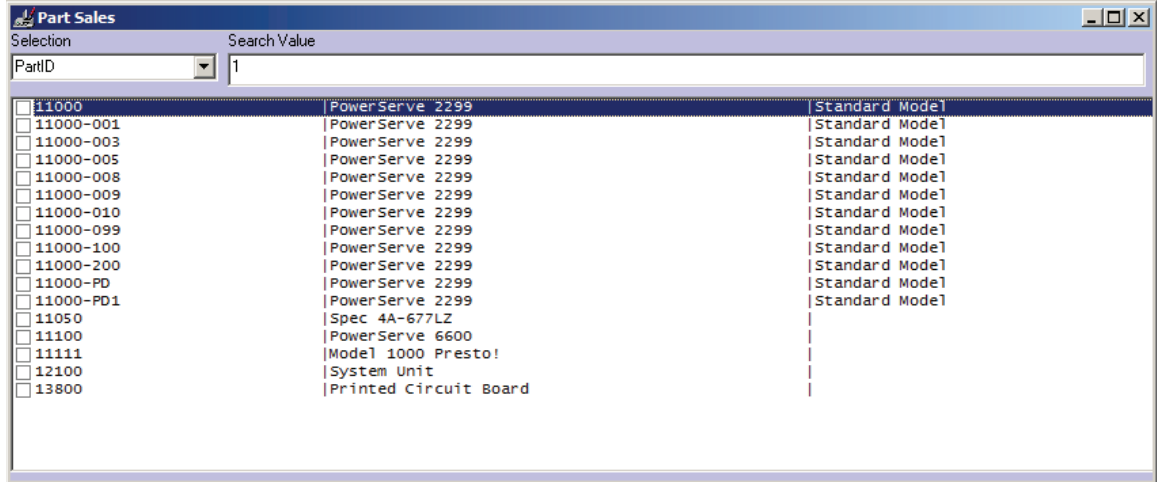
Entering a new order:

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:

MAX Consignment Order Processing

Line Items:

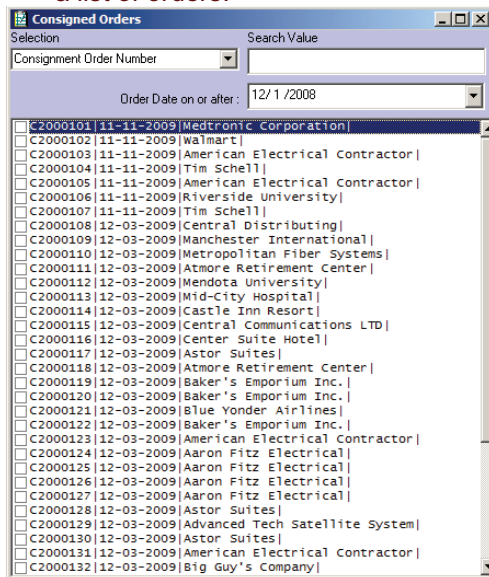
1. Line, Delivery, and Due Date are filled with default values.
2. Enter the Quantity Ordered for this line.
3. Choose the Part ordered by double clicking on the Part ID column. This will open a selection list displaying valid MAX parts:



4. Ship Qty, Description, and Unit of Measure are displayed for information purposes only and cannot be edited.
5. Additional Line Items may be edited by tabbing out of the Due Date field. If the Due Date field does not have focus, double-click on the Due Date field before pressing the Tab key.
6. When all of the order information is correct, select File->Save to save changes.

Editing an Existing Order:

1. Entering information on an existing order follows the same procedures as entering a new order.
2. To retrieve an existing order for editing, double-click on the order number field to retrieve a list of orders.



MAX Consignment Order Processing

Shipping: Select this option to transfer the inventory between MAX locations. The line items will be processed one at a time, and when all line items have shipped complete, the order will be marked "Closed".

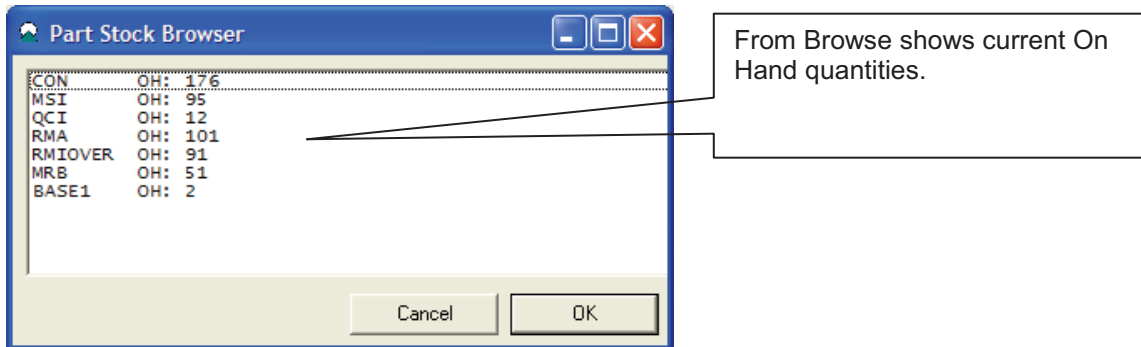
Consignment Shipments are entered by referencing line items on the order and selecting the required ship from stock location and Lot and/or Serial numbers as needed. The Consignment application is Lot and Serial aware, including parts under both Lot AND Serial control.

From and To Stock ID's may be pre-populated with the part's default stock id from MAX or if defaults were entered on the main form.

All open lines will be processed. If a part must be shipped from multiple locations, then it should be shipped once using the Shipping->Ship Consignment order menu from the first location. It can then be shipped again using the Shipping->Ship Consignment order menu for the second location.

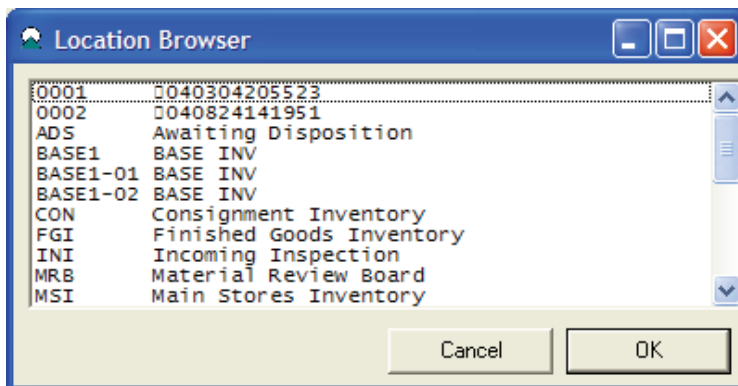
Returning Consignment Shipments: a shipment becomes a return when a matching shipment for the same order has been made to the "From" stock location. If the order or line item is closed (shipped complete) and a return is needed, click on the "Revise Closed Order" and request a shipment.

Ship From:



If the selected From Location has already been shipped to using the current order the Shipment will be considered a return and the order due quantity will be decremented accordingly.

Ship To:



MAX Consignment Order Processing

Shipping Parts not under Lot or Serial Control:

The screenshot shows the 'Line Item Details' window with the following fields and values:

- From Stock: FGI
- To Stock: CON
- Ord - Lin - Del: C2100016 01 01
- Part ID: 11000
- Description: PowerServe 2200
- Qty Available: 999951
- Tot Order Qty: 10
- Due Qty: 10
- Ship Qty: (empty)

Buttons: Ship Line, Skip

1. Select a "To Stock" location.
2. Verify that the "From Stock" location is correct.
3. Enter the quantity to ship in the "Ship Qty" field.
4. Click the Ship Line button to perform the transfer.
5. Click the Skip button if no action should be taken at this time.
6. The Qty Available, Order Number, Line Number, Delivery Number, Part Number, and Description all display for reference only.

Shipping Parts under Lot Control:

The screenshot shows the 'Line Item Details' window with the following fields and values:

- From Stock: FGI
- To Stock: CON
- Ord - Lin - Del: C2100016 02 01
- Part ID: L1
- Description: LOT TESTER
- Qty Available: 12
- Tot Order Qty: 10
- Due Qty: 10
- Pick Qty: 1

Buttons: Ship Line, Skip

Available Serial/Lot ID's:

700117	QC: N	EXP: 2006-09-25	Qty=1
700118	QC: N	EXP: 2006-09-25	Qty=1
700119	QC: N	EXP: 2006-10-08	Qty=12
700120	QC: N	EXP: 2006-10-09	Qty=12
700121	QC: N	EXP: 2006-10-09	Qty=1
700122	QC: N	EXP: 2006-10-09	Qty=1
700123	QC: N	EXP: 2006-10-09	Qty=1
8555	QC: N	EXP: 2006-10-09	Qty=2
F18CC	QC: N	EXP: 2006-05-02	Qty=2
G866	QC: N	EXP: 2006-09-25	Qty=1
h666	QC: N	EXP: 2006-10-09	Qty=1

Selected Serial/Lot ID's:

700105	QC: N	EXP: 2006-09-25	Qty=1
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Buttons: Ship Line, Skip, Remove

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:

The 'Consignment' dialog box shows the following information:

- Please enter the number to take from lot: 700119
- QC: N EXP: 2006-10-08 Qty=12
- Available = 12

Input field: 9

Buttons: OK, Cancel

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

MAX Consignment Order Processing

Shipping Parts under Serial Control:

The screenshot shows the 'Line Item Details' window for a consignment order. The 'From Stock' is MSI and 'To Stock' is CON. The 'Qty Available' is 1156. The 'Part ID' is S1 and the 'Description' is SN TESTER. The 'Available Serial ID's' list contains 10 serial numbers from 2005090030 to 2005090040. The 'Selected Serial ID's' list contains 2 serial numbers: 123456888 and 2005090028. Buttons for 'Ship Line' and 'Skip' are visible.

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 Lot and Serial Control:

The screenshot shows the 'Line Item Details' window for a consignment order with Lot and Serial control. The 'From Stock' is MSI and 'To Stock' is CON. The 'Qty Available' is 337. The 'Part ID' is LS1 and the 'Description' is LOT /SERIAL TESTER. The 'Available Serial/Lot ID's' list contains 15 entries with columns for Serial, Lot, and Exp. The 'Selected Serial/Lot ID's' list contains 3 entries: 1001002 L333, 100503 TIM200, and 100505 TIM200. Buttons for 'Ship Line' and 'Skip' are visible.

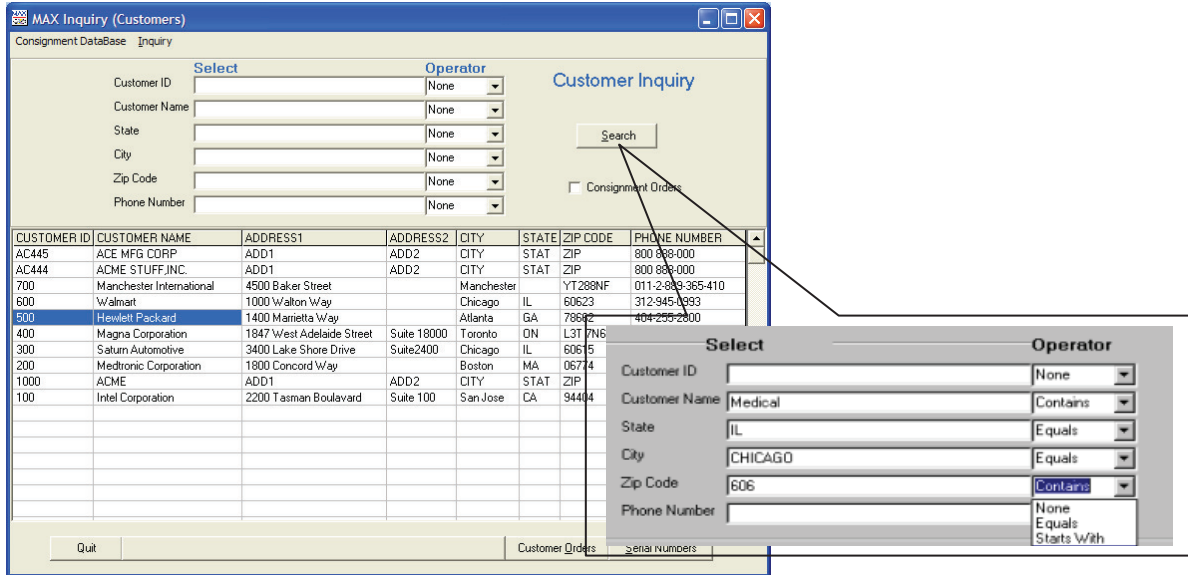
For parts under Serial and Lot control, the serial and lot numbers available in the From location will be displayed. Highlight a line and click the add button or double click until all serials have been assigned.

Select a serial/lot under the selected display and click the remove button if selected by mistake.

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

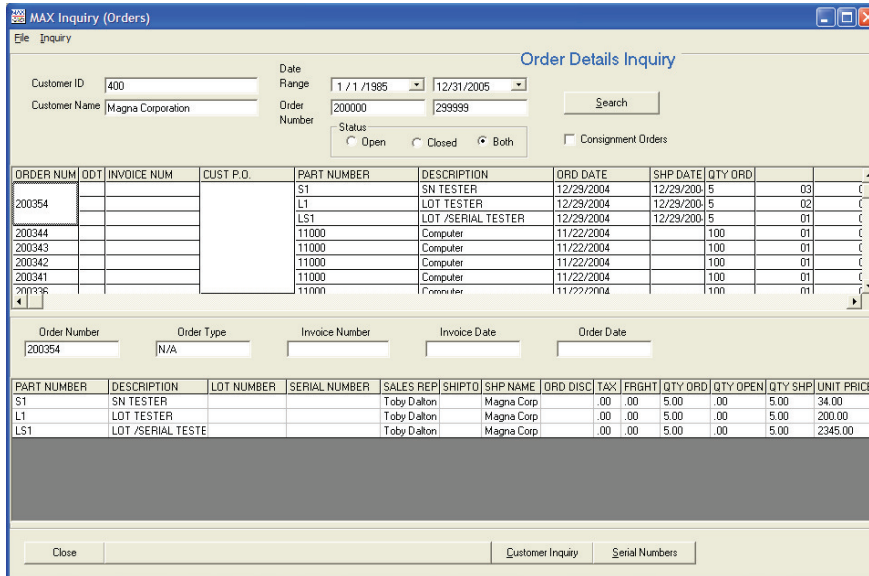
MAX Consignment Order Processing

Inquiry: the purpose of MAX Inquiry is to provide a flexible query tool for find the customer and their corresponding history details.



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.

Order Details Inquiry:



MAX Consignment Order Processing

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:

Customer Name:

Serial Num

Lot Num

Date Range: -

Order Number: -

Status: Open Closed Both

Consignment Order

Search

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			
		8000	80001015			
		8000	80001014			
		8000	80001013			
		8000	80001012			

Close
Customer Orders
Customer Inquiry