



Overview:

The Synergy for MAX Receiving Inspection Automation provides integration between the MAX Receiving process and Synergy workflow for Inspection tracking and management with documents and workflow.

There are two primary pieces of the module that:

1. Create Synergy Receiving Inspection requests when a part is received in MAX that needs inspection,
2. The Receiving Inspection Request in Synergy to track and manage the inspection workflow, along with,
3. The document management and general workflow functions of Synergy, and
4. Once the inspection is done, then logic transfers the receipt to the correct stock location or transfers the rejected receipts to a Return To Vendor stock location. Scrap caused by destructive testing is accounted for as part of the process.

The module includes SQL code that instantly detects when part is received in MAX that requires inspection and creates a new Synergy Receiving Inspection Request.

Once the Receiving Inspection request is "processed" in Synergy, then SQL code instantly transfers the receipt to the process stockroom based on the acceptance or rejection of the material.

Receipt Logic:

When a receipt occurs in MAX in the primary receiving location, the SQL logic "fires" and creates the Receiving Inspection request based on the following:

- PO, Line and Delivery Number
- Vendor ID
- Part Number
- BOM UOM
- Receipt Quantity
- Receipt Date
- MAXID of the receipt (to identify that specific receipt transaction)

The logic is only executed for Parts with Inspection required in the MAX Part Master.

Receiving Inspection Request:

The module comes with a pre-formatted Receiving Inspection Request for Synergy that can be adapted to suit specific requirements.

There are three tabs on the Receiving Inspection Request. The first is for basic information as shown below:

The screenshot shows the 'Inventory Inspection - 00.000.032' form in the 'Default section' tab. The status is 'Created' and it was modified by 'Synergy Admin' on 05/26/2014 at 11:44 AM. The form includes a toolbar with buttons for Save, Refresh, Delete, Copy, Reject, Process flow, and Close. Below the toolbar are three main sections: 'Create' (with 'Synergy Admin' and '05/23/2014 02:27 PM'), 'Inspect' (with 'Person' highlighted in a red box), and 'Process Transfer' (with 'Synergy Admin' and 'Creator'). The main data area contains the following fields:

Purchase Order	700449650601		
Part ID	10084CR3	WASHER, SEALED NUTPLATE ALT: YQ-32057-07	
Receipt Quantity	24,925.00	Scrap Quantity	2.00
BOM UOM	EA		
MRP Due Date	02/14/2014	Start Date	
Receipt Date	02/11/2014	Buyer Code	EC
Person	1	Synergy Admin — Consultant — ClickBond	
Vendor	DELST	DELSTAR TECHNOLOGIES —	
	USA — Vendor — Active	Stock ID	
Inspection Flow	Service Inspection Request	Vendor Contact	
PO Request	Purchase Requisition —		

The second tab is for Notes and Attachments to store certifications, test results, worksheets and any related data using Synergy documents or attachments like this:

The screenshot shows the 'Inventory Inspection - 00.000.032' form in the 'Notes and Attachments' tab. The status is 'Created' and it was modified by 'Synergy Admin' on 05/26/2014 at 11:44 AM. The form includes a toolbar with buttons for Save, Refresh, Delete, Copy, Reject, Process flow, and Close. Below the toolbar are three main sections: 'Create' (with 'Synergy Admin' and '05/23/2014 02:27 PM'), 'Inspect' (with 'Person' highlighted in a red box), and 'Process Transfer' (with 'Synergy Admin' and 'Creator'). The main data area contains the following fields:

MAX Drawing Number	N/A
Remarks: Workflow	
<div style="border: 1px solid gray; height: 80px;"></div>	
Timestamp	Full screen
Attachments	Browse...

The third tab provides for quality and inspection data as shown below:

Inventory Inspection - 00.000.032
Status : Created Modified : Synergy Admin 05/26/2014 11:44 AM

Save Refresh Delete Copy Reject Process flow Close

Create Synergy Admin 05/23/2014 02:27 PM Inspect Person Process Transfer Synergy Admin Creator

Default section Notes and Attachments Quality and Inspection Data

Quality Clauses

Timestamp Full screen

Inspection Required Yes ▾
MAX Inspection Requirements
Inspection Requirements
Lot Size Sample Size
Special Insp Requirements

TNXHIS MAXID 2710420

The Lot Size Sample Size and Special Inspection Requirements are options values that are stored in Synergy to further define the quality and inspection requirements.

Processing Inspection Results:

When the Receiving Inspection request is processed in Synergy, then MAX is updated dynamically with the results.

The standard fields of data include the following:

- The MAX Receipt data based on the MAX ID from the source record
- Quantity Accepted or Rejected
- Scrap Quantity, if any
- To Stock Location, based on the Part Master Primary Stock Location or a Standard Return to Vendor location.

Appendix:

Deliverables include the following:

- installation, configuration and training
- The standard Synergy Receiving Inspection request template (Request 798, Receiving Inspection Template.xml)

- The SQL logic to Process the MAX Receipt and create the Receiving Inspection request in Synergy. (sp_AddInventoryInspectin)
- The SQL logic to process the inventory transfers in MAX after the Receiving Inspection request is processed. (sp_ProcessInventoryInspection)

Additional customizations and enhancements are available using standard consulting services by contacting your Exact MAX Account Manager or by contacting PlusPoint Development, Inc.