

#### **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:

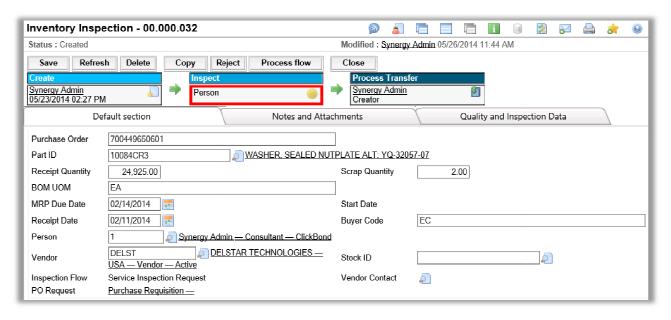
- PO, Line and Delivery Number
- Vendor ID
- Part Number
- BOM UOM
- Receipt Quantity
- Receipt Date
- MAXID of the receipt (to identify that specific receipt transaction

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

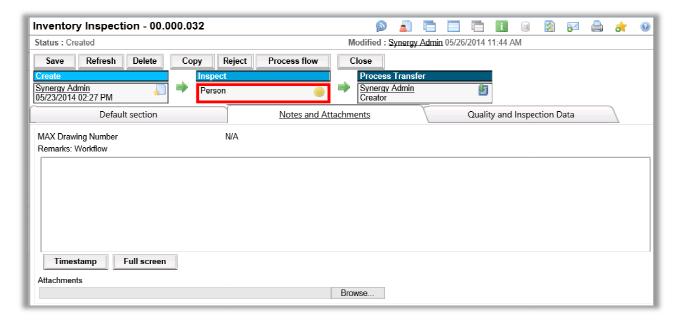
# **Receiving Inspection Request:**

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

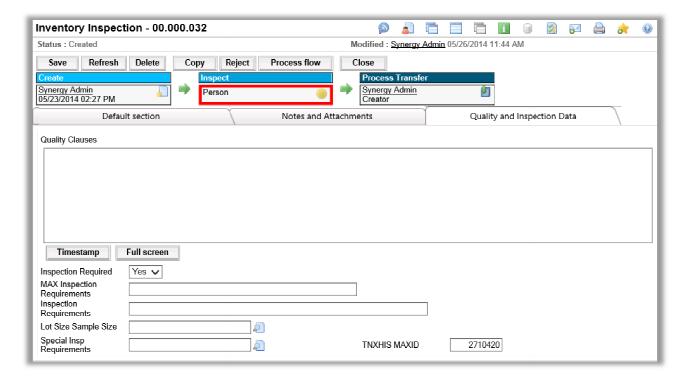
There are three tabs on the Receiving Inspection Request. The first is for basic information as shown below:



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



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.