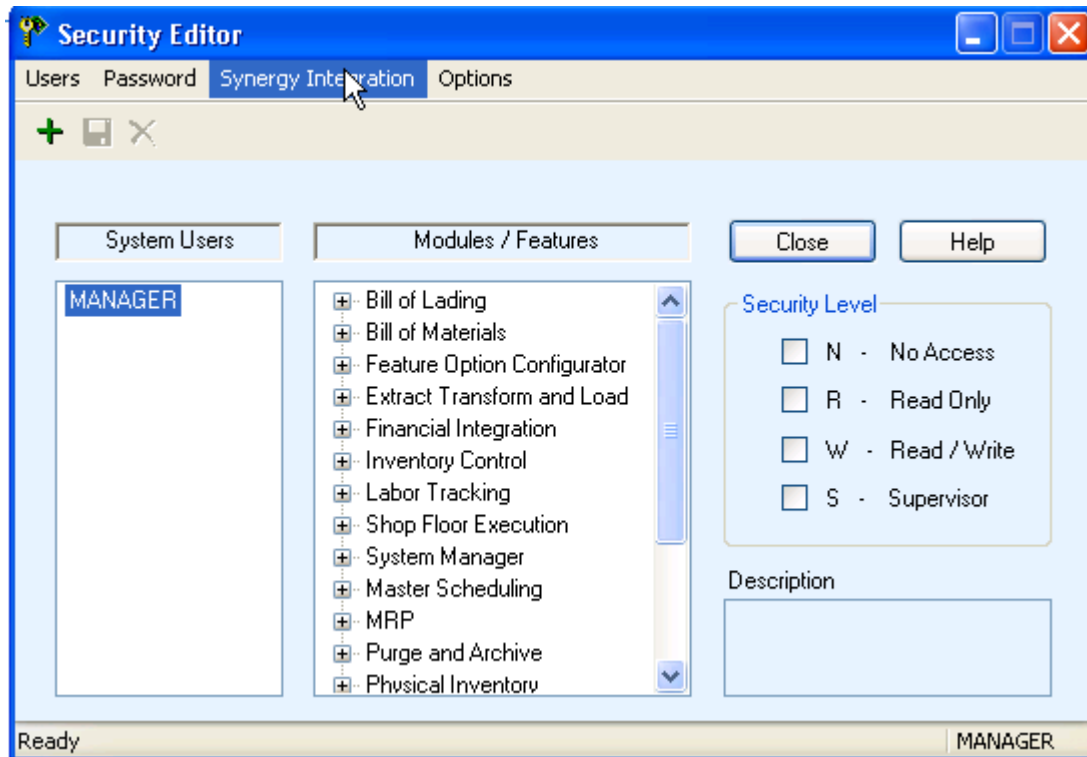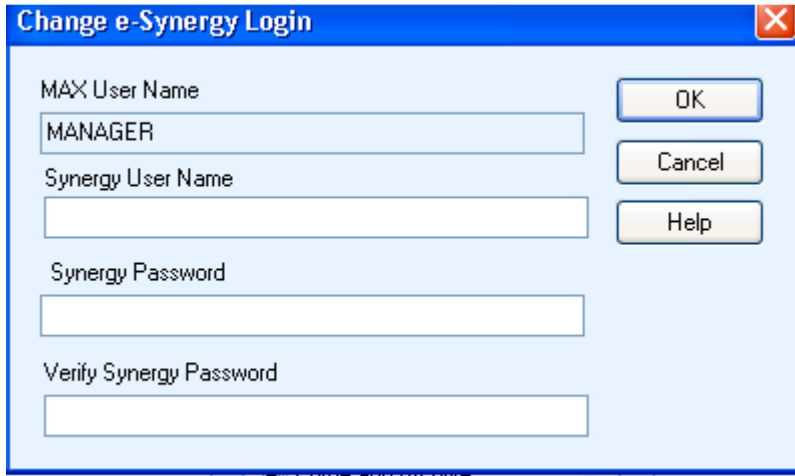# Synergy for MAX and MAX Integration

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Overview

Synergy for MAX and MAX Integration guide is a reference for the settings in MAX and also in Synergy for MAX to get the two systems working smoothly together.

Updated March 8, 2010 for Synergy Version 242 and MAX 5.0 Batch 1830
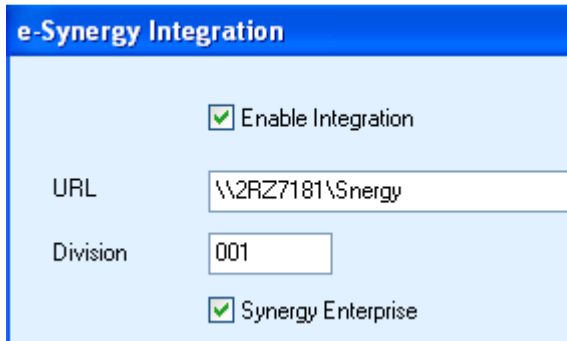
MAX Configuration

Synergy User Name = the network login User Name (for the Administrator)

Synergy Password = the Password for the network login User Name

In MAX System Manager, Options, Synergy Integration, enter the Synergy database name, Division number and check "Synergy Enterprise:
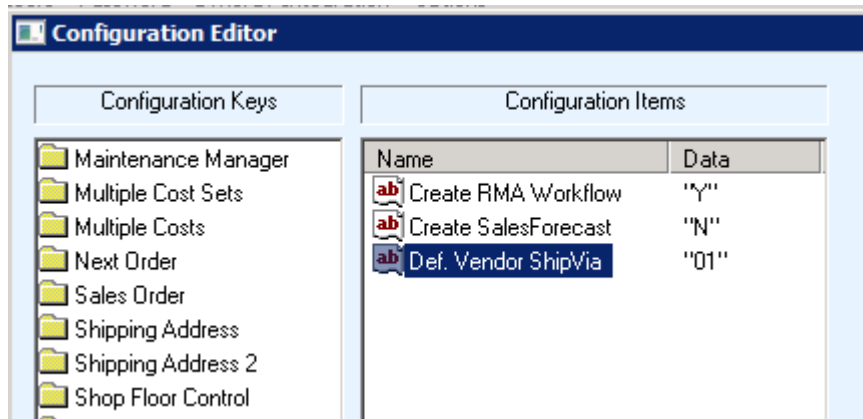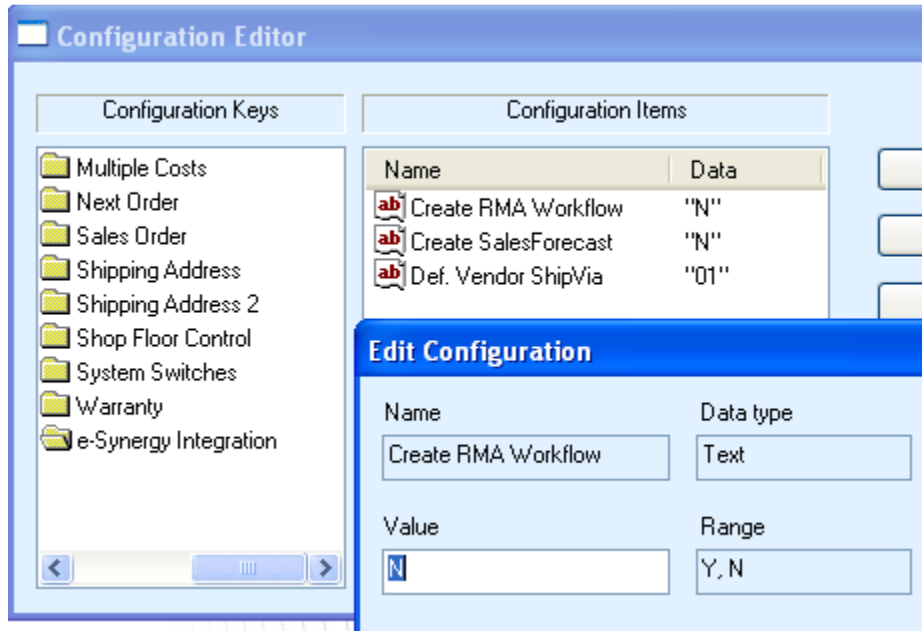
In MAX System Manager, Activity, System Configuration open the windows and scroll to the right to show the e-Synergy Integration options.
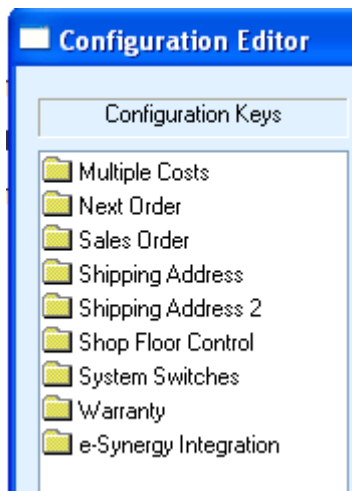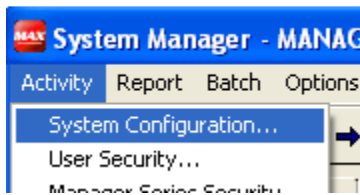
Set the Create RMA and Sales Forecast workflows as appropriate. It is best to start with NO and then refine these once the Synergy processes are defined.

MAX Data in Synergy

Using the Synergy for MAX Reference Startpage, select the Synergy for MAX Settings Startpage and enter the data as defined below.
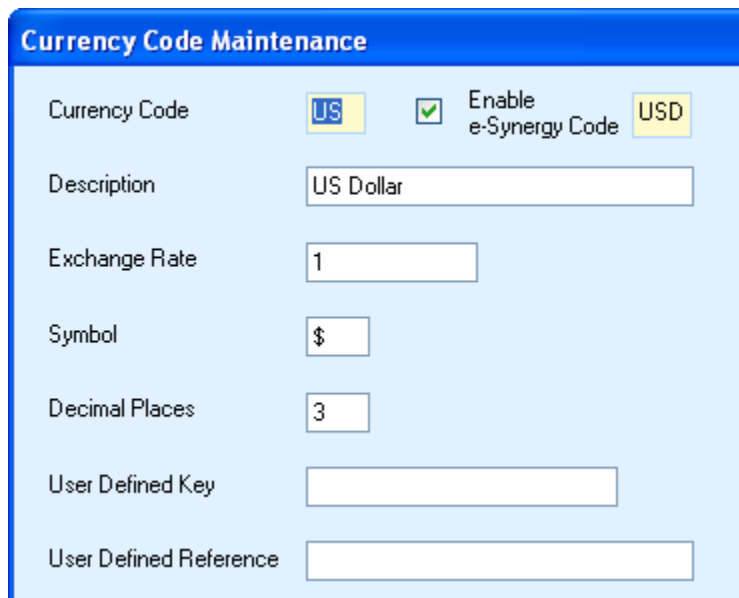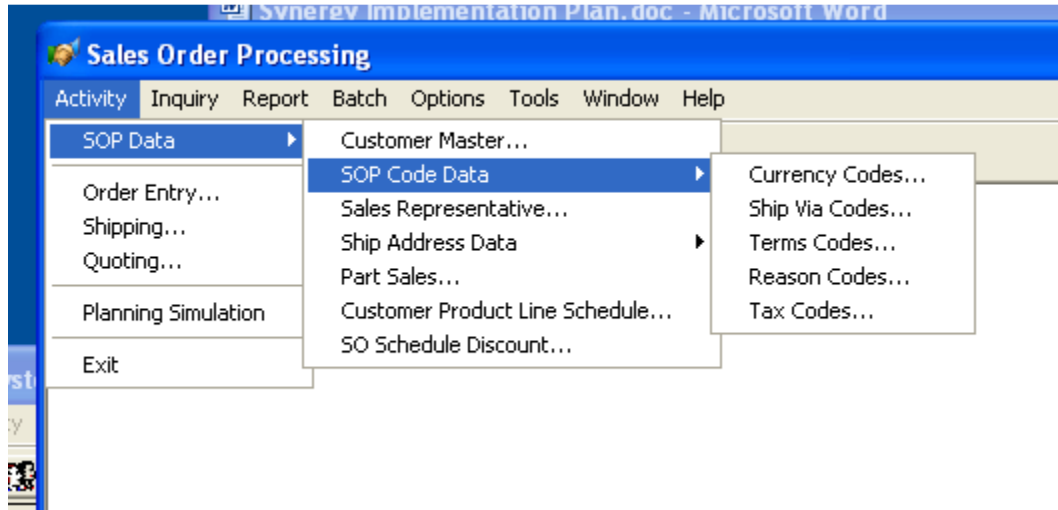
Using the data in MAX, enter the Ship Via Codes to match MAX.

Refer to the Code_Master table in MAX and add Terms, Ship Via and Currency Codes in Synergy to match MAX.

MAX Sales Order Processing Setting (SOP, Activity, SOP Data, SOP Code Data, Currency Codes)

Currency Codes – Update each Currency codes used in MAX and define a Currency code in Synergy.
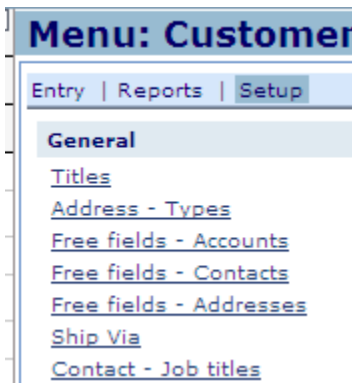
Ship Via Codes - (SOP, Activity, SOP Data, SOP Code Data, Ship Via Codes)

Make a list of the codes in MAX and create corresponding codes that use the exact same values in Synergy. (There is no translation function, so these need to match one for one.)
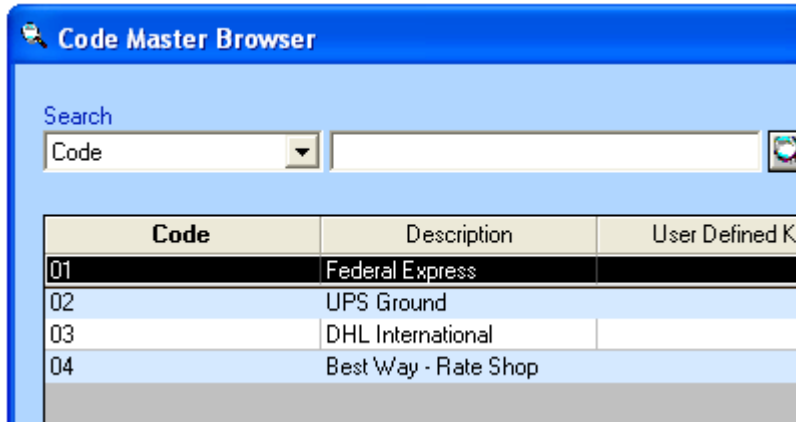
Setup the Synergy Ship Via codes with the Customer, Setup, Ship Via Codes menu option.

MAX Payment Terms Codes (SOP, Activity, SOP Data, SOP Code Data, Term Codes)

Using the Payment Terms Codes in MAX, setup matching codes in Synergy using the Financial, Setup Payment Terms Code menu option in Synergy.

MAX Sales Reps

There needs to be a matching Resource in Synergy for each Sales Rep in MAX. Using the list of Sales Representatives in MAX from SOP, SOP Data, Sales Representatives
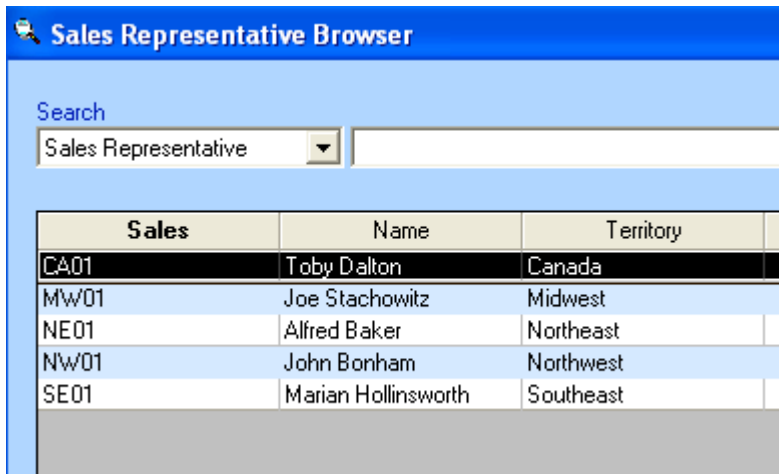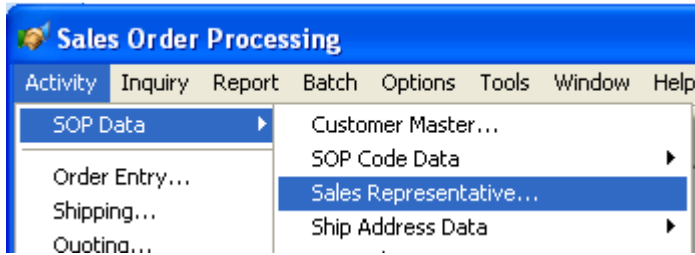
MAX Document Configuration

In MAX, set the parameters as follows to pass data from MAX to Synergy.

Sales Documents

In Sales Order Processing, open a Sales Order and select Options, Preferences and validate the Document Types for the various MAX Sales Documents:

Note: for the Sales Documents to load into Synergy for MAX, the MAX Customer needs to be loaded into Synergy for MAX using the Synergy Sync module in MAX. (See below)
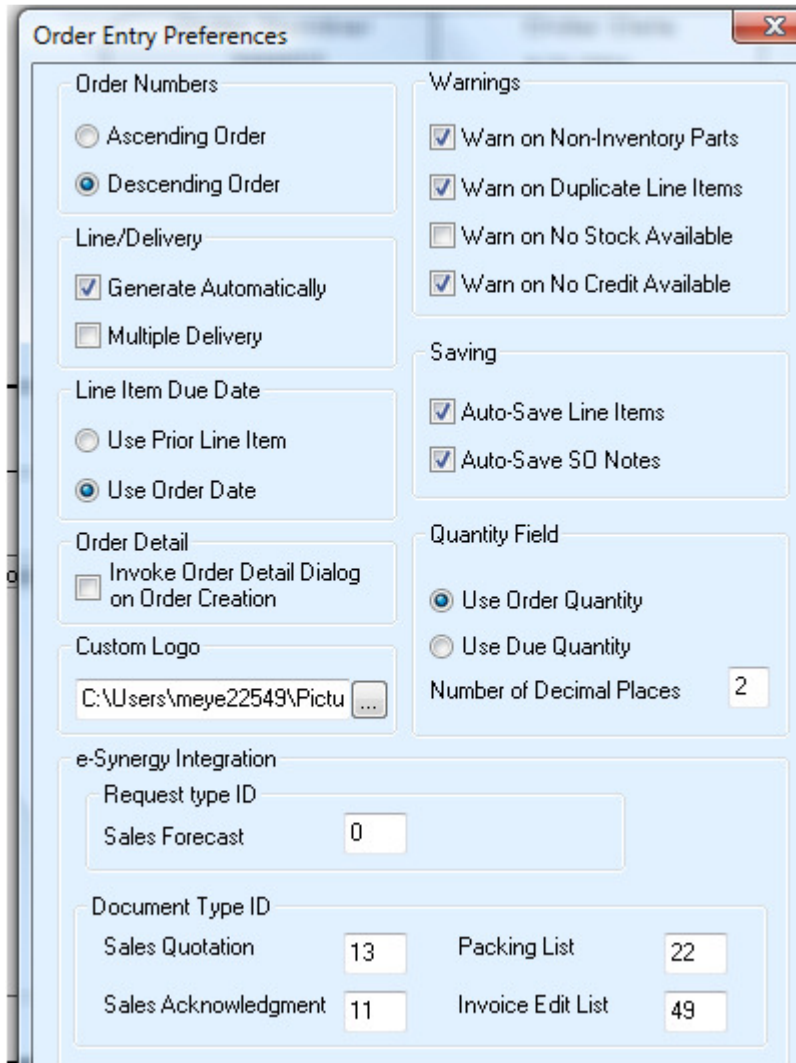
MAX RMA Setup:

Set the Synergy Request Type for the RMA Follow-up for RMAs created in MAX.
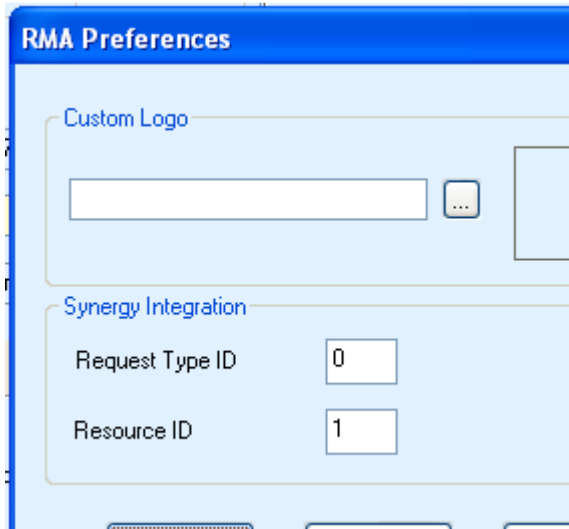
Purchase Order Preferences

System Manager, Purchasing Control, Activity, Purchase Order, Options, Preferences

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Purchase Order Preferences

Line/Delivery
☑ Generate Automatically
☐ Multiple Deliveries

Saving
☐ Auto-Save Line Items
☐ Create Part Vendor record

Non-Inventory
☐ Require GL Reference
☐ Require Receipt Flag

Warnings
☑ Warn on Duplicate Line Items

Manufacturer's Part Number
☐ Allow Entry on Form

Vendor Info
☐ Allow Editing

New POs
☐ Default to taxable POs
☑ Firm Plan PO's

Quantity Field
Number of Decimal Places 2

Requirement Qty
○ Normal Rounding
○ Round Down
○ Round Up
◉ NO Rounding

Custom Logo
[ ] [...]

e-Synergy Integration
Document Type ID
Purchase Orders 6