MaxQ TECHNOLOGIES

Business Intelligence

Financial Management

Supply Chain Management

Solutions Catalog
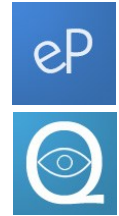## for Microsoft Dynamics SL

Business Solutions for Maximum Performance

MaxQ TECHNOLOGIES

Business Solutions for Maximum Performance

Comprehensive Suite of

Business Intelligence Products

MaxQ offers a comprehensive suite of Business Intelligence products to execute your BI strategy. Using Microsoft's BI foundation tools with eProphet and Qvision, MaxQ offers customers a rich and flexible packaged approach to build your BI framework faster.

Business Intelligence Series

The Right Information

At The Right Time

From the backroom to the boardroom, eProphet helps
every user get the right information at the right time and in a
format that's right for them. The result is people
empowerment across your entire business from a solution
that's easy to learn and use.

eProphet

MaxQ's eProphet solution leverages Business Intelligence (BI) functionality, making it easier for you to get the specific information you need, for better decision making. More than just a BI tool, eProphet is an enterprise wide solution. It delivers information consolidation, data transparency, and the piece of mind that comes from knowing your data is accurate and timely. Unlike other solutions, eProphet addresses the needs of every job function within your organization. From the backroom to the boardroom, eProphet helps every user get the right information at the right time and in a format that's right for them. The result is people empowerment across your entire business from a solution that's easy to learn and use.
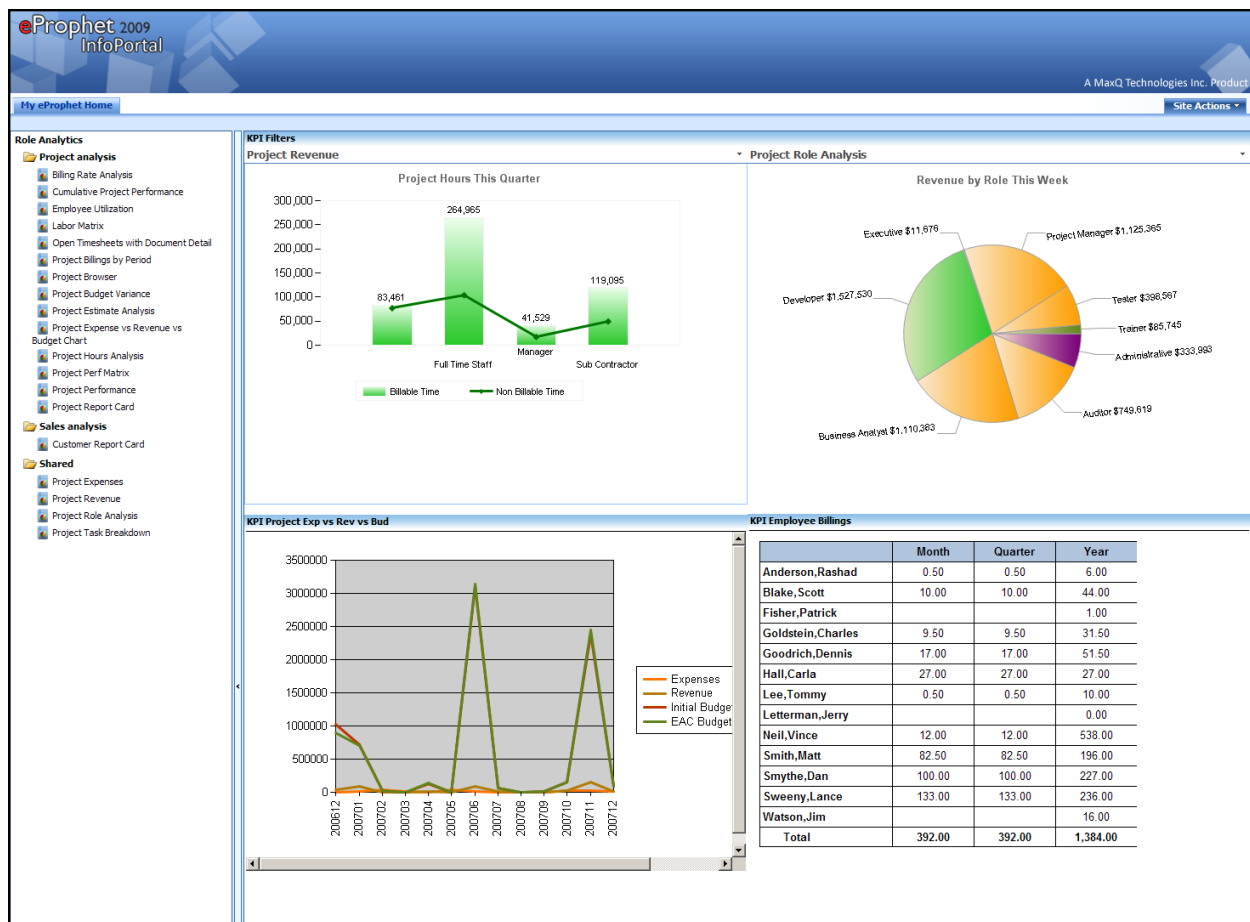
Analytics and KPIs are delivered via the web for zero touch deployment to all users

Benefits

Monitor the Health of Your Organization

Making sound decisions that affect the bottom line shouldn't be challenging. But with data arriving from a variety of companies, sources and formats it often can be. eProphet's web enabled dashboards surface Key Performance Indicators to help you monitor the pulse of every aspect within your business, so you can make decisions quickly and decisively.

### Analyze Information @ Your Fingertips– Just a Click Away!

With dozens of preconfigured analytics, eProphet gives users the ability to analyze business data in infinite ways with zero programming effort. Managed security and flexible reporting output ensures that your intended audience retrieves only the information they need.

Manage Data Your Way

The modular suite is scalable to suit specific industry needs even when those data sources are from different ERP sources. Information consolidation eliminates data silos and with full data transparency, data is easy to access, easy to work with and presented in clear business terminology.

View Data in Formats You Choose

With no "black box" data can be explored with most leading analytic clients including Microsoft Excel. Users can also deliver reports, KPIs and data models in output formats like web browser based HTML, PDF, Excel, XML and any OLAP viewer.
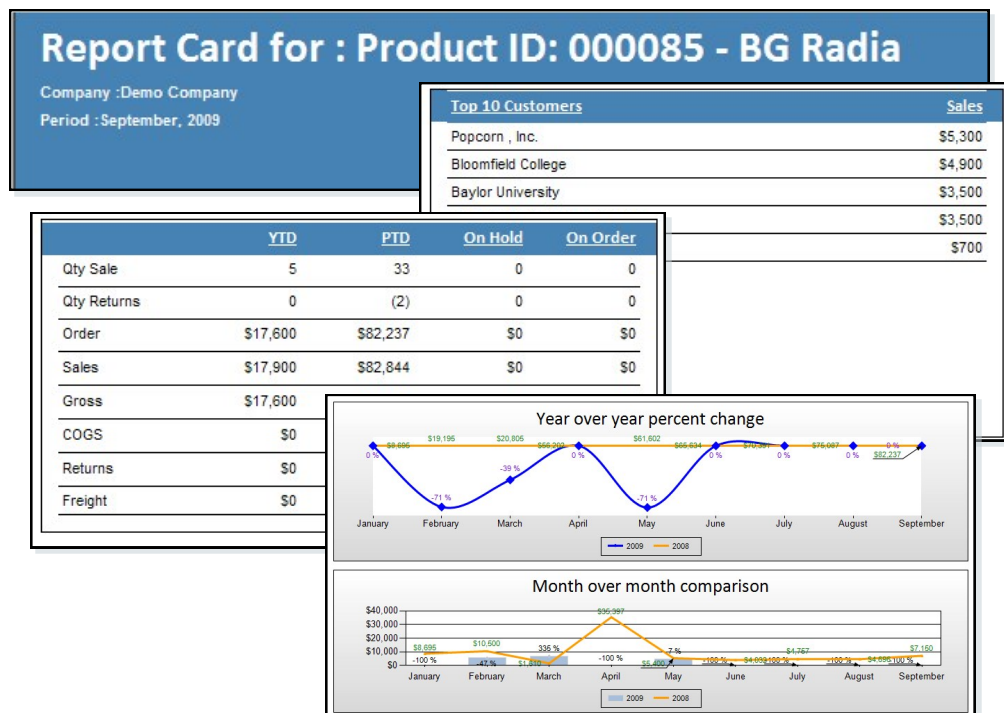
Key Features   Benefits

Alert Subscriptions

Get reports delivered to you automatically when a predefined condition occurs in the database. So if you need to know when an item falls below its reorder level, eProphet will send an alert report to ensure the right person knows it should be restocked.

KPI Assistant

Deliver Key Performance Indicators via KPI web parts with Global filters. Since the web parts work together, if a user changes the date in one web part it is automatically updated in another!

OLAP Report Builder

Enable users to build OLAP reports and queries quickly and easily.

Role Based Security

Need to set up security for Executives, CFOs, Sales Managers or Project Managers? eProphet offers role based security, menus and data level security.

Dynamic Report Columns

In addition to dynamic filters and groupings, columns on a report are dynamic (FRx like) - making it easy to change report parameters on the fly!

**Multi-Currency and
Multi-Language Support**

Innovative support for multi-currency allows users to report across the entire enterprise regardless of the base currency of the source database. Users can also nter data into fields in multiple languages.

Tight Integration

eProphet is completely built using Microsoft technologies and supports SQL 2008. Integrations supported include Microsoft Dynamics SL, Microsoft Dynamics GP, Microsoft Dynamics AX, Microsoft Reporting Services, Microsoft SharePoint and DBC accessible ERPs.

Power Drills Tool

Enable users to conduct interactive reporting & analysis with efficient drill down capabilities. Change parameters easily and reduce the size of your report library.

Business Portal

Share information and increase collaboration across your entire organization. eProphet has the ability to embed in any existing business portal including Microsoft SharePoint.

Wizards and Web Parts

Core database functions, extractions and analytics customizations can be done entirely from a web interface. Wizards ensure that IT resource requirements are low for zero-touch deployment. For most users, only a web browser is required!

Meta Base

Labels that describe the unique traits of your business are a snap to configure and since everything is controlled by the meta base you know that all the data in all reports is consistent and reliable.

MaxQ's eProphet — Project Analysis module leverages Business Intelligence (BI) functionality to make it simpler for you to use the software as your single source of information for project activity, analysis and reporting. Designed to make your entire project management team more efficient and informed, the Project Analysis module comes equipped with prebuilt reports for immediate reporting, the Power Drills tool for analysis of profitability by project and task and built-in integration with Microsoft solutions. eProphet—Project Analysis can help you analyze and generate reports quickly and easily for all your projects, across your entire company, from all angles and all sources, including archival data you may have thought was inaccessible. Your entire team will be able to determine which projects are over budget and why, analyze inventory and vendor utilization across projects and identify possible inefficiencies in existing processes.

MaxQ eProphet—Project Analysis is a complete solution to help your project and operations managers support project and service based work.

Benefits

Saves Time & Money by helping you complete projects on time and within budget each month. With full visibility into all project related metrics, you can analyze employees' activities, compare how you're doing against budget and more.

Integrates Seamlessly with existing ERP systems like Microsoft Dynamics SL and Microsoft Dynamics GP so your ERP data will be loaded without any hassles. You can also embed eProphet into your company's enterprise information portal and other project series applications for centralization of all project activity.

Increases Efficiency since it's easy to learn, implement, support and use. Allows Estimated Actual at Completion (EAC), Forecast at Completion (FAC) and Budget comparisons. If you use Microsoft Dynamics Project and Order Management modules, you can analyze any sales or project activity across both.

Lowers Total Cost of Ownership by allowing each member of your project management team to keep using existing software that is familiar to them including Microsoft Office, SharePoint, Microsoft Dynamics SL, Microsoft Dynamics GP and other Open Database Connectivity (ODBC) accessible ERPs.

Supports a Wide Range of Information Explorers by delivering reports, KPIs and data models in output formats like web browser based HTML, PDF, Excel, XML or any OLAP viewer.

The Power Drills Tool provides interactive reporting & analysis by allowing you to drill down and change parameters easily

Features / Functionality

- Enables the use of pivot tables for what if scenarios, data modeling, and ad hoc analysis and reporting on any project data.

- Allows you to perform analysis across multiple branches and/or subsidiaries; eliminating any existing software's single company setup constraints.

- Provides access to a central repository of information, regardless of data being housed in multiple databases, so your project and operations managers can monitor the pulse of each project's profitability and identify possible process bottlenecks.

- Standard prebuilt reports which provide immediate access to project details for one or more projects by task, customer employee, account categories and time.

- Complete access to archived project data allowing you to see how your projects perform over the long term for easier historical analysis.

- Ability to embed with other applications like Microsoft Dynamics SL and Microsoft Dynamics GP.

- The Power Drills Tool provides interactive reporting & analysis by allowing you to drill down and change parameters easily, hence reducing the size of your report library.

- The Scheduler Tool allows you to schedule report generation and delivery to any member of your team via email or as a link to an information portal like Microsoft SharePoint.

- eProphet's Metadata Design allows you to centralize your business and industry terminology so your reports are meaningful to your business.

Easy to Use, Ad-hoc Inquiry

And Reporting Tool

QVision is an innovative, easy to use, ad-hoc inquiry and reporting tool that provides secure access to your data right from your browser.

Windows Server 2012
Certified

QVision

INNOVATIVE

QVision is an innovative, easy to use, ad-hoc inquiry and reporting tool that provides secure access to your data right from your browser.

QVISION VIEWS

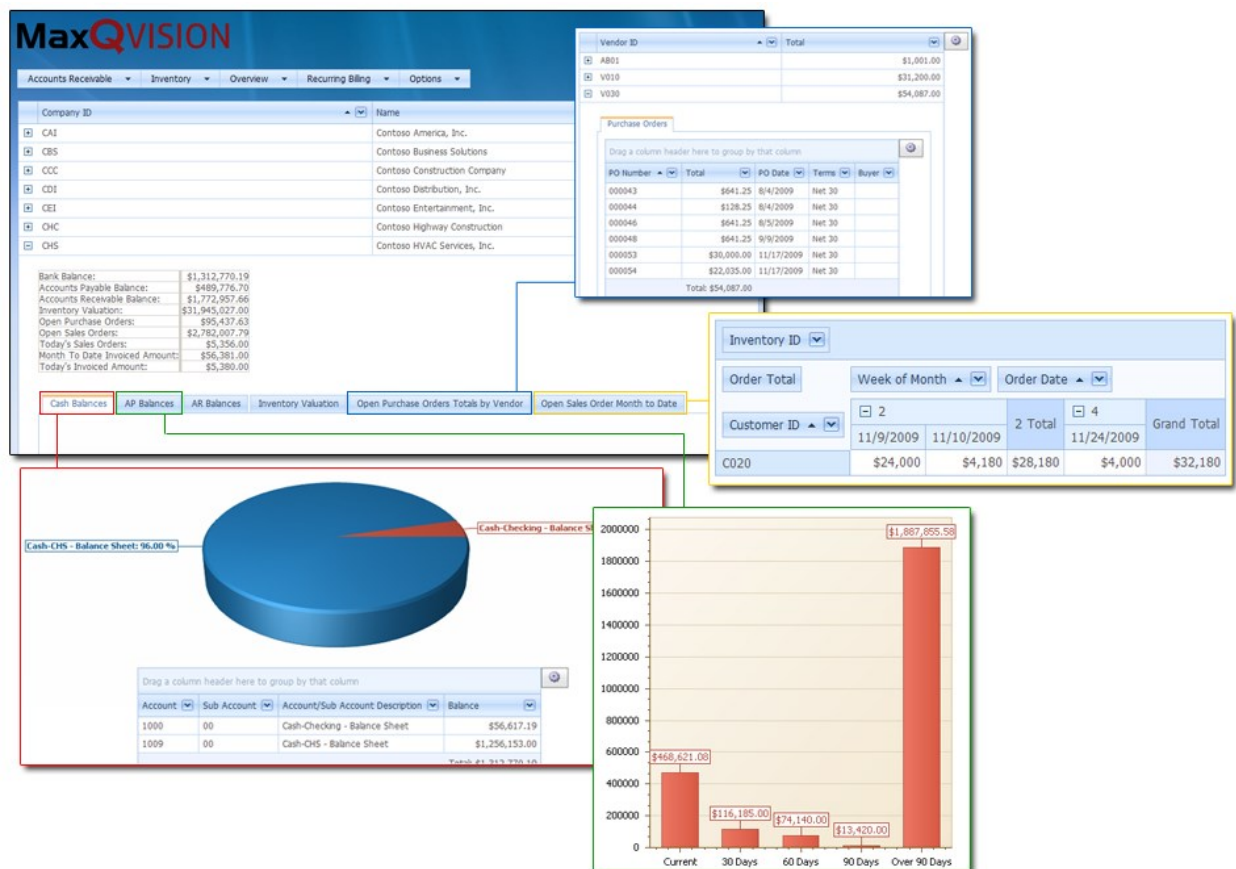QVision provides many different views of your data. Shown here are some examples of those views—KPIs, Pie Charts, Bar Charts, Grids, and Pivot Grid Views.

EXTENSIBLE AND CUSTOMIZABLE

With the QVision Wizard users can easily customize existing or develop new scenarios.

Level List

Add or delete levels from the scenario.

Description
Customers (EPro_QVision_CustomerEDI)
Additional Details (EPro_QVision_CustomerEDI)
Sales Orders (EPro_Bizscenario_SOHeader)
Lineitems (EPro_QVision_SOLines)
Shippers (EPro_QVision_SOShipHeaderByBOL)
Shipments (EDShipment)
Containers (EDContainer)
Shipping Addresses (EPro_QVision_SOAddress)
Salespeople (EPro_QVision_CustSlsPer)
Service Calls (SMServCall)
Problems (EPro_QVision_SMServFault)
Invoices (EPro_QVision_SMInvoice)
Invoice Details (EPro_QVision_SMServDetail)
Invoice Totals (SMServCall)
Recurring Billing Contracts (XRBContrHdr)
AR Documents (EPro_QVision_ARDoc)
Aging (EPro_QVision_AR_Cust_Balance)
CRM Opportunities (EPro_QVision_CRM_Opp_Temp)
Projects (EPro_QVision_PjProj)
Tasks (EPro_QVision_PjPent)

Add New Child Level | Delete Level | Modify Level | Move Level Down | Move Level Up | Import Level

Previous | Next

Available Actions

- ● Create a new scenario
- ○ Modify an existing scenario
- ○ Delete a scenario
- ○ Maintain Menu Categories
- ○ Manage the Menu
- ○ Copy a Scenario
- ○ Import a Scenario
- ○ Export a Scenario
- ○ Add a new drill down action
- ○ Modify an existing drill down action
- ○ Delete one or more drill down actions

Configure Level

Configure the grid used to display data on this level.

Preview

Drag a column header here to group by that column

Customer ID	Name	Class ID	Current Balance	Open Order Total

No data to display

Field Chooser

Sort Field: CustId

Grid Options

☑ Show Filter Bar ☑ Show Filter Row ☑ Show Filter Button
☑ Show Expand/Collapse All ☑ Show Rows Per Page ☑ Enable Customization
☑ Enable Grouping ☐ Auto Expand When Only One Row ☑ Enable Exporting
Show Group Footer:

Edit Form

Column Name	CurrBal	Display Name	CurrBal
Display Name Override	Current Balance	Display Format	
Display Format Override	c	Display Average	☐
Display Maximum Value	☐	Display Minimum Value	☐
Display Total	☐	Show Filter Button	Default
Hyperlink Scenario		Hyperlink Scenario Field Name	
Hyperlink Scenario Override		Hyperlink Scenario Field Name Override	

Update Cancel

AD-Hoc Querying	Prescriptive Guidance	Secure	Extensible and Customizable	Actionable	Data Aggregation

Features / Functionality

■ **Drill Down** — Easily drill down to see lower level details, click on the drill down button, in any grid to show lower level detail.

■ **Drill Across** — QVision can launch any related query easily. Just click on the drill across button and a new related scenario is launched.

■ **Powerful Filtering and Grouping** — Powerful and flexible filtering methods allow users to perform AD-HOC querying easily. Users can now locate just what they are looking for quickly .

■ **Security** — Role and User, Row and Column level security built right in. Powerful security let's users see only what the administrator wants them to see.

■ **Data Exporting** — It's simple to export data from QVision. Just chose what level of data you want to export and in what format, it's that easy.

■ **Actions** — The action arrow allows you to launch related screens or reports from your views.

■ **Data Aggregation** — QVision provides simple to use data aggregation. Most times when looking at customer information, it may take data from several different systems to provide a complete view of that customer. Accounts Receivable and financial information may come from one source, contract management from another, and open sales opportunities from a CRM system. QVision will aggregate all of the data into one view so users can see everything at once - a total picture of the customer. Once you have the total picture in your view, you can launch the related screen or report from the appropriate system (ERP, CRM, etc.) with just one click.

■ **Prescriptive Guidance** — Prescriptive Guidance allows a user to follow a direct path through the data to get the answer they need quickly. Do you have a customer service representative that needs to find the answer to a proof of delivery question? In this scenario, QVision guides the user from finding the customer, assessing the sales order, all the way to finding the package shipment id.

MaxQ
TECHNOLOGIES

Business Solutions for Maximum Performance

Cost Effective, Full-Featured

Financial Solutions

MaxQ's Financial Management Series of modules for Microsoft Dynamics provides integrated financial capabilities that enhance Microsoft Dynamics SL. Our Financial Series modules are designed to provide cost effective, full-featured financial solutions that are easy to install and maintain.

Financial Management Series

Simplify payment application processes.

Advanced Cash Application (ACA) is optimized for quick accurate data entry and eliminates cumbersome steps needed to apply and post cash in the Microsoft Dynamics SL AR module. ACA simplifies payment application processes, such as charge-backs, multiple write-offs, check level deductions and more, providing accurate receivables reporting and detailed cash application—all from one screen.

Advanced Cash Application

Advanced Cash Application (ACA)

Optimized for quick accurate data entry and eliminates cumbersome steps needed to apply and post cash in the Microsoft Dynamics SL AR module. ACA simplifies payment application processes, such as charge-backs, multiple write-offs, check level deductions and more, providing accurate receivables reporting and detailed cash application—all from one screen.

The Advanced Cash Application screen is optimized for quick, accurate data entry.

Benefits

Superior Processes Streamlines complex cash applications; split payments, charge backs, multiple write-offs of over/under payments and check level deductions - all handled from one screen.

Greater Optimization Post unapplied credit memos at the same time as payment application.

Seamless Integration with Microsoft Dynamics SL Accounts Receivable, links to Project Controller and supports EDI payment remittances.

Reduced Costs Reduces cost and staff requirements for cash application processing in high volume sites and sites with national accounts.

Increased Efficiency Multiple write-offs against a single invoice.

Valuable Analysis Generate more current and accurate receivables reporting as well as detailed cash application activity.

ACA allows you to set up approved and unapproved deductions. Also provides the ability to post deductions to projects and tasks.

Features / Functionality

- One screen for all cash application processes.
- User-defined payment deduction types; set deduction limits by user or group.
- Perform charge-backs with automated adjustments and invoice closure.
- Apply credit memos in Order Management to a specific Invoice/DM.
- Split a single payment across multiple AR customers.
- Supports EDI.
- Check level deductions; deductions not tied to a specific invoice.
- Post unapplied credit memos at the same time as payment application.
- Non-receivable cash processing.

Streamlining and simplifying
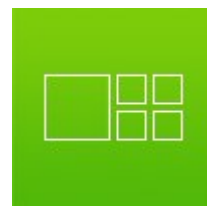
the payment application process.

This EDI Remittance for ACA add on module will allow customers and partners to send an electronic remittance advice to be imported, validated, and automatically processed into an ACA batch.

EDI
Remittance

MaxQ's EDI Remittance for Advanced Cash Application (ACA)

Providing additional functionality to the MaxQ ACA module. Advanced Cash Application eliminates the cumbersome steps needed to apply and post cash in the Microsoft Dynamics SL Accounts Receivable module, thereby streamlining and simplifying the payment application process. It simplifies the complexity of cash application and allows data entry staff to enter payments as they appear on the check advice. Split payments, charge backs, multiple write-offs of over/under payments and check level deductions can be reviewed from one screen. This EDI Remittance for ACA add on module will allow customers and partners to send an electronic remittance advice to be imported, validated, and automatically processed into an ACA batch.

The Inbound EDI Remittance maintenance screen acts as both a maintenance screen and a viewing screen for imported EDI Remittances. This screen can be used to make adjustments, correct errors, or simply view the information before converting the EDI Remittance into an ACA Batch.

Benefits

Superior Processes. EDI Remittance for ACA enables you to do business electronically with

other companies, regardless of the systems or data communications they use.

Greater Optimization. Handles high volume remittance advices from your trading partners around the world.

Seamless Integration. A full featured add-on for Microsoft Dynamics SL and links to MaxQ ACA.

Reduced Costs. Speeds turnaround on payment applications and enhances cash flow. Significantly reduces clerical costs by eliminating manual processes.

Increased Efficiency. Eliminate the time delays and potential errors associated with manual processing of business transactions.
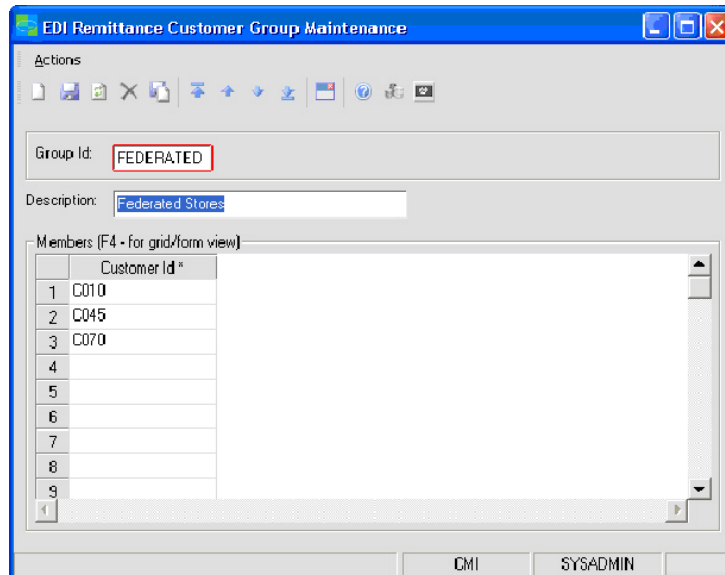
EDI for ACA finds invoices belonging to any customers within a group.

Features / Functionality

- Supports inbound EDI 820 Remittance formats.
- Converts trading partner specific adjustment reason codes to Advanced Cash deduction codes.
- Eliminates manual entry of payments into Advanced Cash Application.
- Ability to create customer groups for cross customer payments.
- Allows the correction and resubmission of EDI Remittance batches.
- Automatically processes high volume remittances.
- Converts valid EDI remittances to Advanced Cash Application batches.

Eliminate the need to purchase preprinted checks.

**MaxQ's AP/PR Laser Checks module** for Microsoft Dynamics SL is designed to leverage your investment in Microsoft Dynamics by eliminating the need to purchase preprinted checks. Check printing with AP/PR Laser Checks is quick, easy and in your control.

AP/PR Laser Checks

MaxQ's AP/PR Laser Checks module for Microsoft Dynamics SL

Designed to leverage your investment in Microsoft Dynamics by eliminating the need to purchase preprinted checks. Check printing with AP/PR Laser Checks is quick, easy and in your control. Using familiar screens, AP/PR Laser Checks produces custom laser checks for an unlimited number of companies and bank accounts on blank check stock; including logos and digitized signatures.

Print checks the way you want them to look.

Easy setup using familiar screens for custom laser check production Unlimited companies, bank accounts, logos and multiple signatures.

Features / Functionality

- Microsoft BackOffice Logo Certified.

- Seamless integration with Microsoft Dynamics SL.

- Easy installation and set up.

- One system for check processing.

- Includes a MICR True Type font to handle MICR encoding.

- Process and print checks according to your company needs.
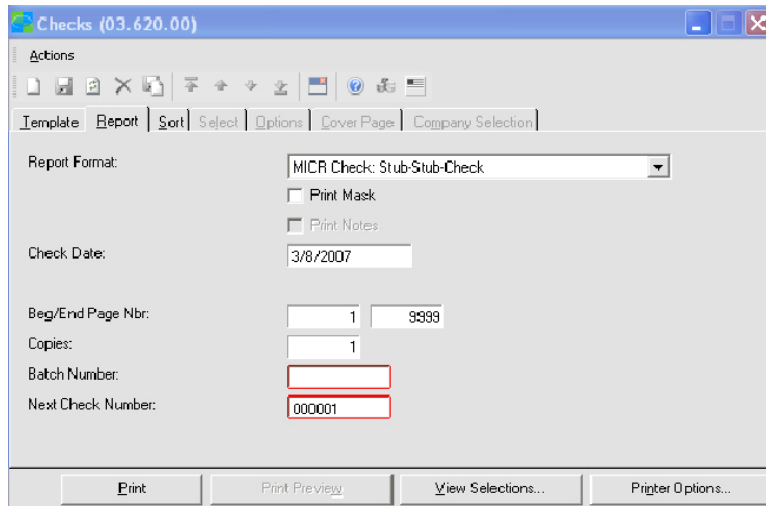
Print checks easily from the standard Microsoft Dynamics SL check printing screen.

Benefits

Superior Processes. Built in security allows for additional signature requirements on checks.

Greater Optimization. Includes a MICR True Type font to handle MICR encoding and a powerful report designer for easy check format modifications.

Seamless Integration. Seamless integration with Microsoft Dynamics SL.

Reduced Costs. Eliminates the need for costly preprinted checks. Prints high quality laser checks on blank stock using your printer.

Increased Efficiency. Handles an unlimited number of bank accounts. Easily change company and bank information or logos.

Valuable Analysis. Provides digitized signatures with maximum dollar amount security.

Automated credit card processing

at the touch of a button

Provides automated credit card processing – at the touch of a button – allowing you to realize immediate benefits through more efficient processing and streamlined operations. Whether used with Microsoft Dynamics SL's Accounts Receivable module, the Order Management module or implemented using the Charge It! Object,

Charge It!

MaxQ's ChargeIt!

Provides automated credit card processing – at the touch of a button – allowing you to realize immediate benefits through more efficient processing and streamlined operations. Whether used with Microsoft Dynamics SL's Accounts Receivable module, the Order Management module or implemented using the Charge It! Object, ChargeIt! supports all major credit card processors. It also simplifies end of day closing and automatically books all related accounting transactions.

NEW - Upgraded Encryption Methods! Supports SQL Server encryption Implements automated Audit Trails Purges cardholder data after customer defined retention periods and MORE! Customers can also place orders via credit card payments online (when combined with the ChargeIt! Object). Once the order is submitted, customers then receive an email notification (using MaxQ's Document Agent Module) when the order is received and shipped.

NEW FEATURES!

- Improved support for PCI compliance.
- Upgraded Encryption Methods—using SQL Server.
- Allows for deferred transactions—when credit card information is retrieved on web site, order can be created later with automatic matching.
- Credit card auditing and reporting available.
- Enhanced credit card purging.

Access the Credit Card Transaction screen directly from Microsoft Dynamics SL's Order Management module. Once authorized, click process – all AR transactions are booked automatically.

Additional Features / Functionality

- Processes transactions on-line or in batch mode.
- Gives customers the flexibility to place orders via credit card payments online.
- Automatically places rejected credit card purchases on hold and provides rejection reports.
- Leverages end user knowledge of Microsoft Dynamics SL - Easy installation and set up using familiar Microsoft Dynamics SL screens.
- Eliminates booking sales for customers who have exceeded their credit limits.

Benefits

Superior Processes. Integration with MaxQ Document Agent.
Greater Optimization. Split order/invoice against unlimited credit cards or apply multiple credit cards against a single sales order.

Seamless Integration. Add easy and efficient credit card processing to Microsoft Dynamics SL. Access from the Microsoft Dynamics SL menu, sales order entry screen, AR invoice screen or shipper screen. Use the Address Verification Service (AVS) to confirm legitimacy of transactions.

Reduced Costs. Decrease online order processing time - process credit card transactions in
seconds.

Increased Efficiency. Process credit cards directly from your website if using the Charge It! Object.

Valuable Analysis. Automatically create all transactions to book fees, mark invoices as paid, book revenue and create receivables.

Save time, and reduce risk with

MaxQ's Deposit Processing

MaxQ's Deposit Processing module ends the time consuming task of manually applying and reconciling deposits in Microsoft Dynamics SL. Automated deposit handling reduces processing costs and the risk of errors. With Deposit Processing you can easily manage layaways or custom jobs for your customers. Apply deposits to multiple invoices or accept multiple deposits against a single order. Ideal for situations when a deposit needs to be made at the time of the order.

Deposit Processing

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Benefits

Superior Processes. Deposit Processing delivers the ability to apply new deposits and auto-apply either existing on-account cash or credits to a specific Order Management Sales Order.

Greater Optimization. Event logs provide easy troubleshooting of data entry errors.

Seamless Integration. Integrates with MaxQ Charge It! to handle any combination of payment
situations and with Microsoft Dynamics SL Order Management's credit limit checking, to automatically release the order as payments are made.

Reduced Costs. Automated deposit processing reduces transaction processing costs.

Increased Efficiency. Fewer errors and multiple payment options contribute to improved customer service.

Valuable Analysis. Complete control of deposit checks with a complete audit rail, as well as flexible bank deposit support.

Features / Functionality

- Seamless integration with MaxQ Charge It! to combine cash, checks and credit card charges on a single order with all Accounts Receivable cash applications done automatically.

- Automates deposit processing in Microsoft Dynamics SL.

- Deposits, on-account cash or credits are automatically applied when invoices are created.

- Allows for multiple payments to be made against a single order (payment schedules).

- Deposit Processing maintains unapplied amount - a deposit cannot be over applied.

Automatically fax and/or email your
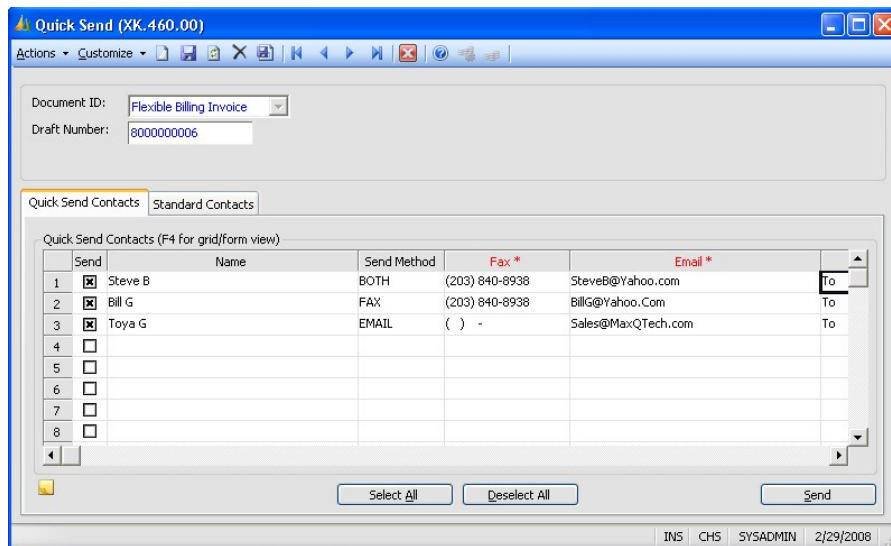
Microsoft Dynamics SL Documents

This module automatically sends, via fax and/or email, your Microsoft Dynamics SL Order Management, Accounts Receivable, Purchasing and Flexible Billing documents to key customers and suppliers. As a valuable extension of your existing supply chain planning resources, Document Agent will eliminate steps from your order processing methods, improving your productivity and customer service. This module also interfaces with a wide variety of mail and fax servers and is quick and easy to install.

Document Agent

The MaxQ Document Agent

This module automatically sends, via fax and/or email, your Microsoft Dynamics SL Order Management, Accounts Receivable, Purchasing and Flexible Billing documents to key customers and suppliers. As a valuable extension of your existing supply chain planning resources, Document Agent will eliminate steps from your order processing methods, improving your productivity and customer service. This module also interfaces with a wide variety of mail and fax servers and is quick and easy to install.

Allows you to send bulk email & faxes automatically for Microsoft Dynamics SL Sales Orders, Purchase Orders, Accounts Receivable & Flexible Billing documents.

Benefits

Superior Processes. Automatically sends quotes, order confirmations, and/or invoices as an Order Management order step.

Greater Optimization. Using fax numbers and email addresses from Microsoft Dynamics SL address and contact records, you can modify the DA document distribution list for each customer and/or vendor for all or specified documents.

Seamless Integration. Document Agent is fully integrated with Microsoft Dynamics SL Order Management, Accounts Receivable, Purchasing and Flexible Billing.

Reduced Costs. By eliminating steps from the order process, Document Agent saves time by reducing administrative tasks and improves your customer service by providing quick, consistent information.

Increased Efficiency. Enables batch sending of Order Management, Purchasing, AR and Flexible Billing documents.

Valuable Analysis. Provides a history and status log of all email and fax documents submitted and sent with the ability to resubmit documents.
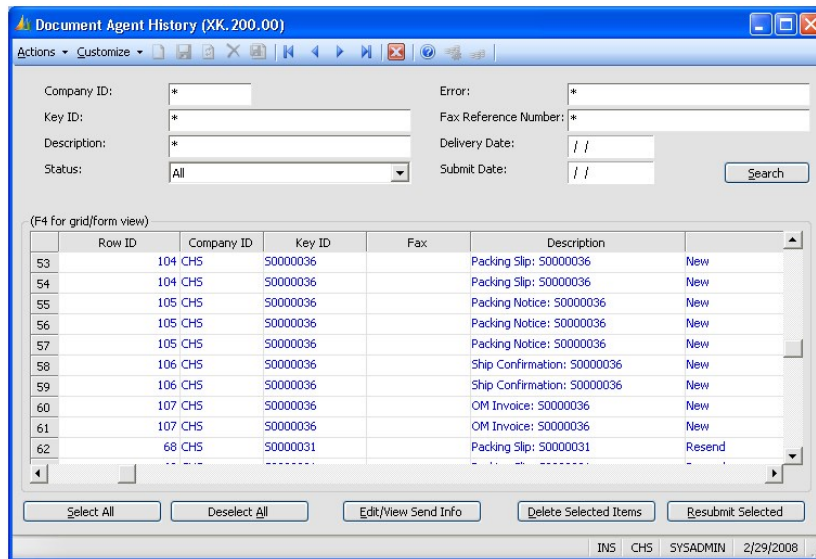
Document Agent maintains a history and status log of all email and fax documents submitted and sent with the ability to resubmit documents.

_____

May be used with Microsoft Dynamics SL Process Engine (v.7.5.0) which provides for more efficient processing of large volumes of emails and faxes.

Features / Functionality

- Documents sent are generated from the Microsoft Dynamics SL report forms used and will reflect your format customizations.

- Each document can be sent to multiple recipients via email and/or fax.

- Automatically updates customer and vendor record email addresses and fax numbers from the Document Agent distribution lists.

- User maintained distribution lists for each customer and vendor; with the capability to specify email and fax numbers for each address record type.

- Email address fields for customer bill to, customer ship to and vendor remittance address information.

- Quick send option for Microsoft Dynamics SL Sales Orders, Purchase Orders, Accounts Receivable and Flexible Billing invoices.

A Complete Billing and Revenue

Management Solution

A complete Billing and Revenue Management solution for managing complex operational and accounting processes such as billing, revenue recognition, contract management and more. RBRR allows users to better manage product licensing, contract renewals, pricing and deferred revenue processes.

Recurring Billing & Revenue Recognition

MaxQ's Recurring Billing/Revenue Recognition

A complete Billing and Revenue Management solution for managing complex operational and accounting processes such as billing, revenue recognition, contract management and more. RBRR allows users to better manage product licensing, contract renewals, pricing and deferred revenue processes. RBRR provides improved internal controls and audit support, the use of spreadsheets can be completely eliminated. RBRR is completely integrated with Dynamics SL's Order Management, Accounts Receivable and Project Accounting modules.

Turns Microsoft Dynamics SL into a flexible yet robust repetitive billing system to improve your billing accuracy, revenue flow and customer service. Easily interfaces with MaxQ Charge It!

NEW FEATURES!

- Perpetual Contracts – such contracts will bill until the contract is cancelled.

- Contract Renewals – a flexible contract renewal process which also allows the consolidation of multiple contracts into one. Historical Renewal Tracking is also available.

- Automatic generation of contracts to match new and/or existing revenue schedules.

- Revenue Recognition Adjustments – when revenue recognition schedules are modified, the appropriate adjustments are automatically generated.

- New and flexible Inquiry tools as well as reports have been added to the product.

- Contract renewal notices can be emailed and/or faxed when MaxQ Document Agent is used.

Perfect for subscription plans, membership fees, dues & license agreements. Mix time periods; bill annually/recognize monthly, bill quarterly/recognize monthly, etc. All accounting is automatically and accurately done according to the business rules you define.

Additional Features / Functionality

- Generates billings by customers, contracts, contract classes or date ranges

- Automatically alerts end user when billing process is complete.

- External contract interface for full integration with web sites and external systems.

- Flexible invoice scheduling (daily, monthly, bi-monthly, etc) or user-defined calendars.

- Use of templates for recurring billing purposes.

- Support for a variety of pricing models through the Dynamics SL Order Management system.

- Support for multiple business models such as multi-element agreements, VSOE (vendor specific objective evidence), multiple currencies.

Benefits

Superior Processes: RBRR automates important billing and revenue management processes and helps increase revenue, reduce costs and strengthen compliance.

Increased Efficiency: Automates the process of renewing contracts, billing, recognizing revenue and updating GL.

Seamless Integration: MaxQ RBRR functions within the framework of Dynamics SL which provides powerful Project Management tools. Links to MaxQ Charge It allow credit cards to be automatically billed either when billing is done or based on a pre-defined schedule.

Compliance: Automation of revenue recognition allows for a SOX compliant process to be implemented. A complete audit trail is maintained and revenue is scheduled and allocated automatically independent of billing terms.

Flexibility: Revenue can be deferred based on products or revenue type over the appropriate period of time.

Valuable Analysis: Future revenue flows can be accurately forecast based on existing Revenue Recognition Schedules. Renewal rates can also be reported and analyzed as the application keeps track of all renewals.

Increase accuracy, saves time and
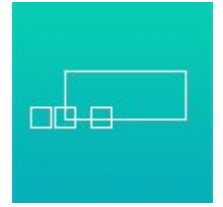
reduces legal exposure

Increase accuracy, saves time and reduces legal exposure by automating and managing the detailed procedures necessary to meet the terms of your royalty tasks. RM handles even the most complicated contractual situations. Built to support organizations of any size, it includes contract management, sales aggregation and processing, statement generation, royalty calculation and payment processing.

Royalty Mangement

MaxQ's Royalty Management

Increase accuracy, saves time and reduces legal exposure by automating and managing the detailed procedures necessary to meet the terms of your royalty tasks. RM handles even the most complicated contractual situations. Built to support organizations of any size, it includes contract management, sales aggregation and processing, statement generation, royalty calculation and payment processing.

Cash or accrual calculation per contract. Define a unique royalty payment frequency per contract – daily, weekly, monthly, quarterly, yearly. Flexible calculation types include flat fee, fixed amount, list price, net amount or a combination.

Benefits

Superior Processes. Provides the ability to track various forms of royalties including sliding scale rates, effective dates and guaranteed royalty amounts.

Seamless Integration. Integrates with Microsoft Dynamics SL. Creation of Accounts Payable vouchers enables MaxQ AP/PR laser checks to be created.

Reduced Costs. Cuts administrative time—creates general ledger entries for accrual of royalties' payables.

Valuable Analysis. Tracks licensee account information contract details, rights and the royalty payment requirements.

Increased Efficiency. Flexible calculation types include flat fee, fixed amount, list price, net amount and/or combinations of them.
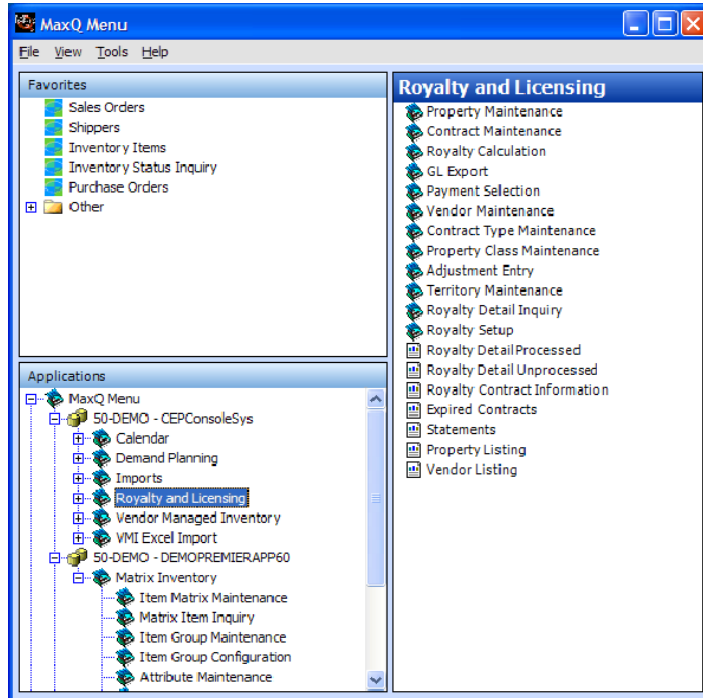
The Right Answers at your fingertips! Manage even the most complicated contractual royalties.

Features / Functionality

- Unlimited number of intellectual property codes, licenses, contracts, and royalty payees.

- Cash or accrual calculation per contract.

- Calculation of royalties due based upon actual orders or manually entered royalty sales.

- Complete auditable reporting for royalty calculations.

- Royalty statement reporting details; all transactions for licensor accounting and reporting.

Streamline the management and

tracking process

Streamline the management and tracking process for earned and used vendor rebates. Vendor Rebates handles the four most common types of   rebates that vendors offer, Cooperative (Co-Op) Marketing, Purchase Volume Rebates, SPIFFs and Price Protection. Track individual promotional programs to ensure you are taking full advantage of available discounts and get the rebates you are entitled to – painlessly.

Vendor Rebates

MaxQ's Vendor Rebates

Streamline the management and tracking process for earned and used vendor rebates. Vendor Rebates handles the four most common types of   rebates that vendors offer, Cooperative (Co-Op) Marketing, Purchase Volume Rebates, SPIFFs and Price Protection. Track individual promotional programs to ensure you are taking full advantage of available discounts and get the rebates you are entitled to – painlessly.

Keep track of earned and used vendor rebates.

Benefits

Superior Processes. Defines rebates for a class of products and/or specific inventory items.

Seamless Integration. Automatically calculates rebates earned from released Microsoft Dynamics SL Purchasing Receipt/Invoice batches including return to vendor.

Reduced Costs. Reduces administrative work. Adjusts rebates "across the board" to eliminate redundant entries and adjustments.

Increased Efficiency. Defines rebates for individual vendors or groupings of multiple site vendors.

Valuable Analysis. Reports on rebates by vendor, product line, and date range. Provides detailed tracking of rebates used and unused.

Create rebates based on any combination of locations, product types and monthly specials.

Features / Functionality

- Calculate rebates earned from Microsoft Dynamics SL Order Management shippers using processed Inventory Batch (INTRAN) records.

- Utilize rebate calculations based on percentage of vendor price or fixed amount per unit with optionally defined minimums.

- Gain the flexibility to define quantity or dollar amount breaks in rebate calculations.

- Use custom formulas to create rebates based on any combination of locations, product types and monthly specials.

- Select and process unused rebates to create Accounts Payable Debit Adjustments.

MaxQ TECHNOLOGIES

Business Solutions for Maximum Performance

Enhance your System's

Supply Chain Capabilities

The MaxQ Supply Chain Management Series of modules for Microsoft Dynamics SL are a suite of products that enhance the supply chain capabilities of your system. Using any of our modules will provide Microsoft Dynamics SL with integrated functionality to handle critical supply chain functions like Demand Planning, Supply Chain Planning and many more.

Supply Chain Management Series

Organize Your Forecasting Information

For More Effective Planning and Analysis

MaxQ's Advanced Forecasting module is the foundation of a successful supply chain planning strategy. Used as part of the Demand Planning solution or on its own, the AF module adds many collaborative features including several import and export options for the forecasting process. AF organizes your forecasting information to be used more effectively for planning and analysis.

Advanced Forecasting

MaxQ's Advanced Forecasting module (AF)

Advanced Forecasting is the foundation of a successful supply chain planning strategy. Used as part of the Demand Planning solution or on its own, the AF module adds many collaborative features including several import and export options for the forecasting process. AF organizes your forecasting information to be used more effectively for planning and analysis. Forecasts can be received or sent to customers, sales reps, or product planners. In addition, you can send your expected purchase forecasts to your vendors. Formats supported include EDI, Excel and delimited text files.
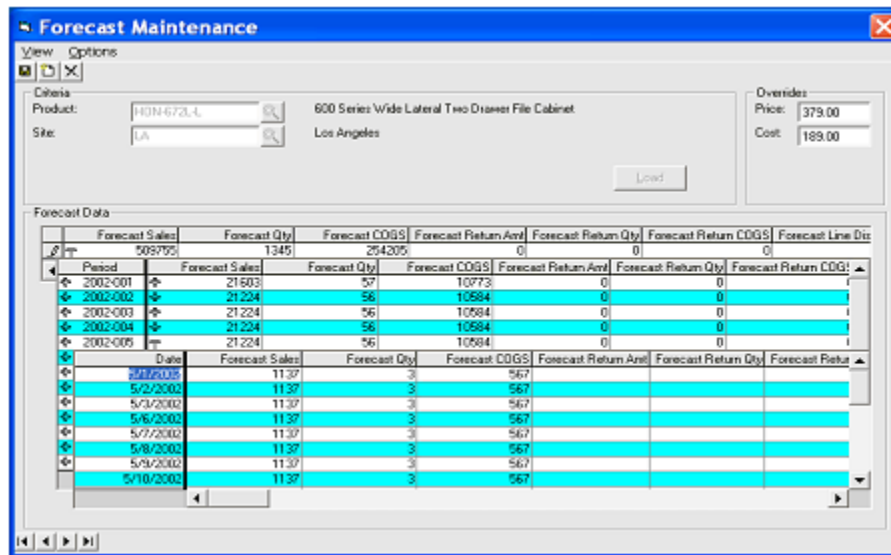
The Forecast Maintenance Screen makes it easy to enter & maintain forecast versions. Enter a forecast quantity and it is automatically distributed down to each forecast day. Prices are automatically calculated.

Benefits

Superior Processes. By increasing your ability to respond quickly to changes in customer demand you are able to deliver the highest level of customer service

Greater Optimization. The forecast inquiry screen allows you to build pivot table reports quickly and easily.

Seamless Integration. If you are receiving forecasts or planning schedules from EDI trading partners, our EDI integration makes this information transfer smooth and simple.

Reduced Costs. More accurate forecasting allows you to reduce capital expenditure in inventory and lower inventory management and warehousing costs.

Increased Efficiency. Ease of use allows for immediate reaction to demand and supply changes.

Valuable Analysis. Do you model forecasts in Excel? No problem. Our Excel Forecast wizard allows forecast data developed in Excel to be easily imported into Advanced Forecasting,   saving you time and money.

Use the feature set chart to choose the MaxQ Forecasting product that is right for you.	Forecasting	Advanced Forecasting	Demand Planning
Included with MaxQ Supply Chain Planning	●	○	○
Forecast Calendar	●	●	●
Pricing Chart	●	●	●
Manual Forecast Entry/Maintenance	●	●	●
Unlimited Forecast Versions	●	●	●
Forecast Integration to eProphet for Reporting and Analysis	●	●	●
Forecast Integration to MaxQ Supply Chain Planning	●	●	●
Excel Import	○	●	●
EDI Import/Export	○	●	●
Forecast Inquiry Screen	○	●	●
Forecast Reports	○	●	●
Data Import/Export API	○	●	●
Forecast Pro Unlimited Statistical Engine	○	○	●
Best-Fit Statistical Model Selection	○	○	●
Create Forecast Hierarchies	○	○	●
Create Forecast Product Groups	○	○	●
Top Down/Bottom Up Forecasting	○	○	●
Event Model Definition	○	○	●
Import Transactional History	○	○	●

# Create A More Accurate Forecast

With MaxQ's Demand Planning

Successfully understanding, predicting and profitably managing customer demand is an absolute need in today's fast moving world. The DP module allows users to break down demand to different components, using multiple techniques to accurately predict demand for these components and assemble them to create a more accurate forecast.

Demand Planning

MaxQ's Demand Planning (DP)

It's much more than forecasting. Successfully understanding, predicting and profitably managing customer demand is an absolute need in today's fast moving world. The DP module allows users to break down demand to different components, using multiple techniques to accurately predict demand for these components and assemble them to create a more accurate forecast. You gain the ability to turn forecasting future sales from guesswork to a sound prediction based on historical data. Complete integration with Supply Chain Planning automates distribution and supply chain planning.
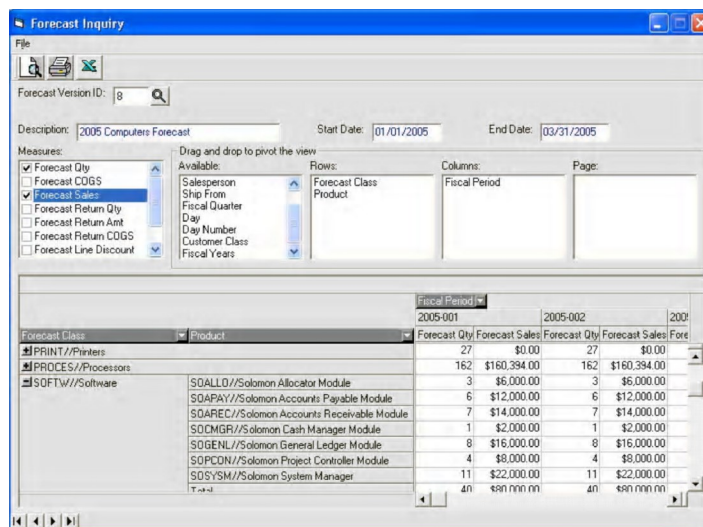
Automatically determines the forecast horizon from the last historical period, the ending date of the forecast version and the monthly or weekly option and passes this information to the project file.

Benefits

Superior Processes. Early detection of trends increases your company's agility in responding to changes in customer demand, and quickly provides the highest level of customer service.

Greater Optimization. DP's adjustment/override tool allows you to modify the forecast to easily accommodate changing conditions and align customer demand with supply chain planning.

Seamless Integration. Complete integration to Supply Chain Planning for automatic distribution and supply chain planning.

Reduced Costs. Lower capital expenditure in inventory carrying costs by reducing safety stock and over-stocked conditions – plus more accurate forecasting lowers management costs.

Increased Efficiency. Aligns customer demand with your supply chain planning. Quickly performs "what-if" scenarios and drilldowns using advanced, proven statistical forecasting methods to get unsurpassed forecast accuracy.

Valuable Analysis. DP has an electronic statistical expert that tests data properties and selects the most appropriate forecasting model to fit your data.
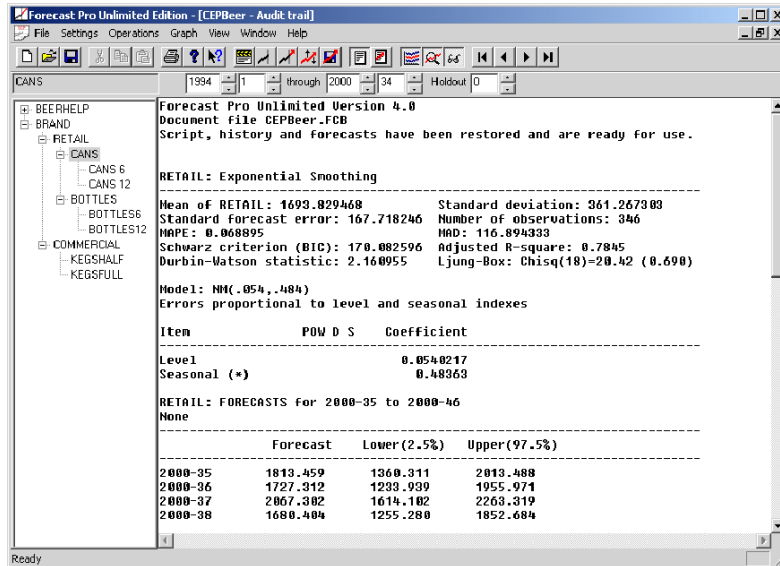
- *Gain Greater Flexibility in Organizing Your Data.*

- *Develop accurate forecasts with powerful statistical tools. This easy to use system satisfies all mainstream business forecasting needs.*

- *Forecast Overrides & Modifiers are Automatically Restored.*

Features / Functionality

- Supports Forecast Pro®; allows you to specify the sort order of the hierarchy.

- Uses sales history & statistical techniques to predict future usage for an unlimited number of items.

- Import historical item usage directly from Microsoft Dynamics SL and Microsoft Dynamics GP; serves as historical basis forecasting.

- Powerful expert selection mode calculates the optimum statistical model automatically.

- Ability to test forecasts against actual performance to increase accuracy.

- User-definable planning groups on any level or combination of levels (i.e. product, class, territory) using bottom up or top down methods for maintenance.

- Mix and match user-definable planning groups for custom forecast models that fit your business.

- Create forecast models that adjust for special events, pre/post-event effects and irregular occurrences (promotions, advertising campaigns, strikes, weather, etc).

- Uses powerful, multi-level forecasting models (Exponential Smoothing, Box-Jenkins, Curve Fitting, Simple and Low Volume Models) to forecast different product types for different market conditions.

- Document forecast changes online for instant recall.

Excellent Automation Combined with

Ease Of Use

Financial Management allows for freight shopping, least cost routing, carrier selection, printing of labels and the printing of necessary manifest documents. Excellent automation combined with ease of use makes this a valuable part of SCM fulfillment.

Freight Manifesting

MaxQ's Freight Manifesting (FM)

A complete solution and is designed to leverage your investment in Microsoft Dynamics SL (formerly Solomon). Transportation planning is the process of optimally scheduling, loading, and delivering shipments to customers and other warehouse sites while managing costs, delivery dates, carrier's paperwork, etc. FM allows for freight shopping, least cost routing, carrier selection, printing of labels and the printing of necessary manifest documents. Excellent automation combined with ease of use makes this a valuable part of SCM fulfillment.

Default carrier and user definable business rules reduces errors and streamlines freight calculations.

Benefits

Superior Processes. No need to import/export data to a third party freight application.

Greater Optimization. Available carriers include UPS, FedEx Ground & FedEx Home Delivery with the ability to configure user-definable carriers including truckload carriers. Includes Rate/Zone Imports for UPS & FedEx.

Seamless Integration. Leverages your investment in Microsoft Dynamics SL. Any Microsoft Dynamics SL user on the network can freight shop, create labels, manifest and track packages.

Reduced Costs. Cuts order processing times and produces printed or electronic shipment manifests for your carriers.

Increased Efficiency. Performs freight shopping calculations from the Microsoft Dynamics SL Order Management – Order Entry Screen, while you're on the phone with your client taking the order – it's fast and easy!

Valuable Analysis. Ability to invoice quoted freight cost regardless of actual freight cost. Uses Microsoft Dynamics SL inventory item data to automatically calculate carton and item weights.

Shop for freight directly from the Sales Order and Shipper screens.

Features / Functionality

- Flexible user defined shop calendar defining manufacturing, work, holidays and forecast days; supports electronic scales for entry of parcel weights.

- Easy to use import features to automatically update carrier rates when published.

- Handling of standard and hundred weight calculations using negotiated rates.

- Print carrier-specific labels for each container with the option to print automatically when shipper is created using Microsoft Dynamics SL Order Management Order Type steps.

- Automatic generation of tracking numbers per shipment.

- Ability to link tracking number to carrier web site for detailed tracking information.

- Tight integration with Order Management workflow and Order Type steps.

Handle Unlimited Characteristics

And a Variety of Product Types
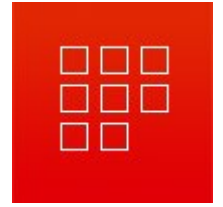
This module has the ability to handle an unlimited number of user defined characteristics. Matrix Inventory works for a wide variety of product attribute types used in many different industries. Whether working with size/color/style and waist/length for apparel, size/width for shoes, or pattern/color/width for flooring, MI is the right solution.

Matrix Inventory Management

MaxQ's Matrix Inventory Management (MI)

This module has the ability to handle an unlimited number of user defined characteristics. Matrix Inventory works for a wide variety of product attribute types used in many different industries. Whether working with size/color/style and waist/length for apparel, size/width for shoes, or pattern/color/width for flooring, MI is the right solution. MI adds matrix style entry windows to inventory item setup and maintenance, sales orders entry, purchase order entry and purchase order receipt entry with flexible inventory inquiries and attribute searches.

Inventory items with the ability to generate standardized item descriptions and Inventory IDs.

Benefits

Superior Processes. Takes less time to enter and maintain inventory items while reducing errors.

Greater Optimization. Generates standardized item descriptions and Inventory IDs.

Seamless Integration. Leverages your investment in Microsoft Dynamics SL. Automatically sets up Microsoft Dynamics SL attributes entries.

Reduced Costs. Speeds process for sales and purchase order entries resulting in increased order accuracy.

Increased Efficiency. Assign products to separate categories under the same SKU. View inventory positions by attributes. Inventory attributes allow for quick inventory item searching.

Valuable Analysis. Includes matrix reports allowing you to view your sales and/or inventory information in a "snapshot."

Flexible matrix entry with unlimited attributes; available in Inventory, Sales Order and Purchase Order Entries.

Features / Functionality

- Ability to set-up an unlimited number of item groups and an unlimited number of attributes.

- Assign color size, style, waist/length or other special attributes as needed.

- Matrix entry screens added to Inventory Entry and Maintenance, Sales Order Entry, Purchase Order entry and Purchase Order receipt.

- Powerful setup configuration allows for the grouping of items and entering of needed inventory data elements easily and quickly.

- Multiple inventory ID & description assignment methods; Auto Number Attribute, Driven or combination.

Lower Purchasing Costs

Improve Responsiveness

Better Manage Suppliers

Request for Quotation Management allows purchasing agents to lower purchasing costs, improve responsiveness to customers, and better manage suppliers; managing the entire sourcing process with ease. Users can send out multiple bids to multiple vendors quickly and easily. All responses are compiled on one screen which makes choosing the most appropriate supplier easy and efficient.

Request for Quotation Management

## Request for Quotation (RFQ)

Efficiently automate the process of sourcing inventory and services from vendors. It is fully integrated with Microsoft Dynamics SL, Sales Order Processing, Inventory Management and Purchase Order Processing modules. RFQ allows purchasing agents to lower purchasing costs, improve responsiveness to customers, and better manage suppliers; managing the entire sourcing process with ease. Users can send out multiple bids to multiple vendors quickly and easily. All responses are compiled on one screen which makes choosing the most appropriate supplier easy and efficient. With close integration to purchasing and order processing, RFQs can be sent automatically by email, EDI or fax responses.


The Excel Spreadsheet features a submit button allowing vendors to submit the responses directly to the MaxQ import web service. Email responses are received and imported into a mailbox automatically.

The RFQ entry screen enables users to customize the Purchase and Sales Order creation process to meet the unique needs of each customer.
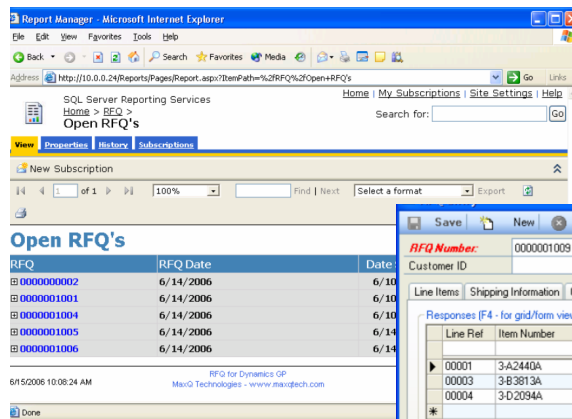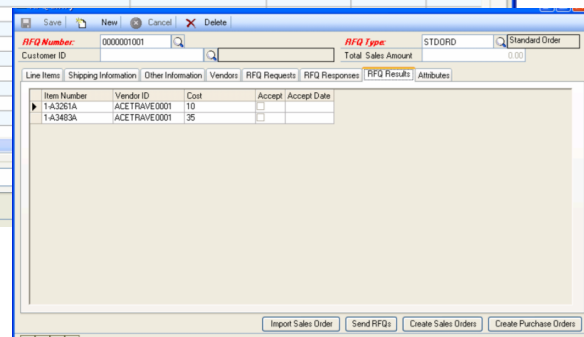
The summary of all open RFQs enables users to drill down into the line and vendor details associated with each open RFQ.
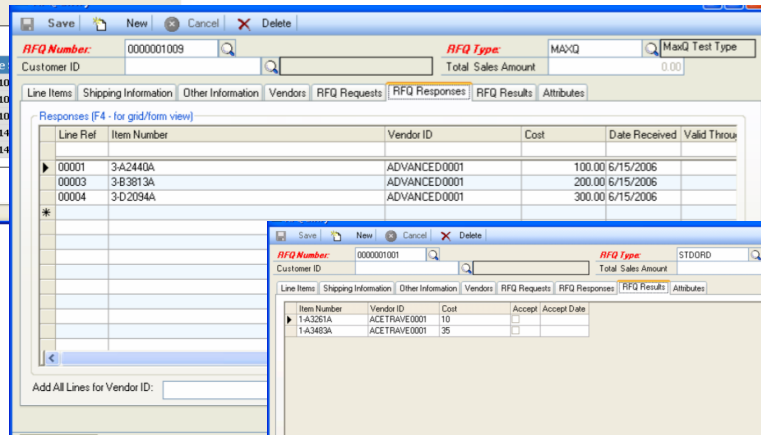
Users are able to view all vendor responses, once imported, via the RFQ Responses screen for appropriate vendor selection.

Features / Functionality

- Simple to use interface gives the user access to all information for an RFQ on one page.

- Creates RFQs with multiple lines/parts and multiple suppliers per line.

- Creates RFQ line items that may not exist in the Microsoft Dynamics SL Inventory Item Master.

- Imports all or selected items from an Order/Quote to an RFQ.

- Awards items on a RFQ to one supplier or split them between several suppliers.

- Creates purchase orders based on selected RFQ bids.

- Each vendor/part maintains its own contact (s) and due dates.

- Flexible Review Worksheet makes it easy to track and pick winning bids.

Benefits

Superior Processes Promote accuracy in your material and service purchasing and be more   responsive to customer quotations.

Greater Optimization Reduce document entry time through automated document creation. When winning bids are selected, purchase orders and sales orders are automatically created.

Seamless Integration RFQ is fully integrated with Microsoft Dynamics SL, Sales Order Processing, Inventory Management and Purchase Order Processing modules.

Reduced Costs Efficient processing and streamlined operations get you the right inventory, for the right price, at the right time.

Increased Efficiency The RFQ document is delivered automatically using the vendor's preferred delivery method – email, mail, fax, EDI, Excel spreadsheets, HTML or XML.

Valuable Analysis Easy to compare RFQs; replies vendor to vendor giving you the information and visibility you need to make intelligent purchasing decisions.

The Perfect way to keep schedule

and be in Control of Your

Supply Chain Operations

Integrate your field service needs with your supply chain operations. Service Order Management is perfect for any organization that needs to schedule and control installation and ensure other service functions are in sync with their supply chain operations.

Service Order Management

The MaxQ's Service Order Management

This module integrates your field service needs with your supply chain operations. Service Integration—Order Management is perfect for any organization that needs to schedule and control installation and ensure other service functions are in sync with their supply chain operations (sales order management, purchasing and inventory systems).

Ability to schedule service calls along with Sales Orders. Can indicate appropriate contractor skill and specialty levels.

Create service calls with your Sales Orders.

Benefits

Superior Processes. Ability to integrate field service needs with Sales Order Management; automatically sends quotes, order confirmations and/or invoices as an Order Management step.

Greater Optimization. Ability to select appropriate contractors for desired skill level, job size and travel time.

Seamless Integration. Fully integrated with Microsoft Dynamics SL Order Management and Purchasing modules.

Reduced Costs. By eliminating steps from the order process, service integration saves time by reducing administrative tasks and improves your customer service by providing quick information.

Increased Efficiency. Automatic documentation to sales orders.

Valuable Analysis. The ability to track project time, shipping, materials and contractor costs, enables you to better forecast your labor needs and quote projects more accurately.

Answer Essential Questions
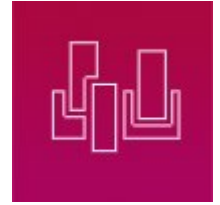
For Your Business Quickly and Easily

This module enhances Microsoft Dynamics SL with
advanced replenishment methods focusing on planning the
supply chain. Who (which customer), What (which product),
Where (ship to from), When (at the right time), and Why (at
the right cost), are essential questions that must be
answered quickly and easily in order to meet customers'
needs while minimizing your costs.

Supply Chain Planning

MaxQ's Supply Chain Planning (SCP)   Features and Functionality

• Aggregates independent demand from sales orders, forecasts, and projects and dependent demand from production orders and transfers by user specified time-periods.

• Utilizes your existing bills of material and/or kits to explode the aggregated demand to subassemblies, components, and raw materials requirements.

• Creates suggested supply orders when the projected available would go negative.

• Flexible replenishment policies including Reorder Point, Discrete, Max/Min, Days of Supply, Make to Order and Multiple Drop Ship Methods.

• Adjusts suggested order quantities to meet production and/or vendor minimums, lot sizes, and/or maximum order sizes

• Includes a simple SCP work order system supporting just-in-time or scheduled production for Kit Assembly/Production Entry that also provides for mass production reporting capability.

• Provides a work bench for planners and buyers to review the suggested supply orders, adjust/consolidate orders, and create multiple actual supply orders with a single click.

• Includes the capability to create all supply order types: purchase orders, drop ship purchase orders, OM transfers, OM Kit Assembly, SL work orders, and SCP work orders.

• Includes the capability to automatically create any type of actual or planned supply order types directly from sales orders with the option to use net of available.

• Provides a work order rescheduling work bench to mass update SL Work Order dates.

• Easy to review exception reporting including recommended planning adjustments with drill down to the update the existing orders.

• Utilizes a hierarchy of planning parameters from material class down to item site that reduces the maintenance effort.

• Includes an Available to Promise feature that explodes through the bill of material/kits and materials plan to assist you to determine realistic promise dates to your customers. It includes the capability to check all sales order lines to determine a promise date for ship complete orders.

• Offers full pegging up and down the materials plan providing visibility to the sources of demand and supply.

MaxQ's Supply Chain Planning (SCP)

Experience increased order fulfillment, more controlled inventory levels and greater customer satisfaction with MaxQ's Supply Chain Planning (SCP) module. It is designed to aggregate time-phased demand and supply to develop an optimal plan to meet customer demand, production and procurement requirements, and to reduce inventory investment. It integrates with your current Dynamics SL applications, including Order Management, Inventory, Purchasing, Bills of Materials and/or Kits, Work Orders, and Projects. Supply Chain Planning encompasses Material Requirements Planning (MRP), Distribution Requirements Planning (DRP), and all of the functionality of the Inventory Replenishment module.

Whether you are make to stock, make to order, or both; a manufacturer, a distributor, or both; single or multiple stocking locations; project oriented, product oriented or both; MaxQ Supply Chain Planning fits your business needs. Supply Chain Planning includes basic forecasting functions – historical usage or manual entry – and it also integrates with MaxQ Advanced Forecasting and MaxQ Demand Planning modules.

MaxQ Supply Chain Planning allows you to have a complete spreadsheet view of all supplies and demands in your supply chain.

Benefits

Superior Processes. Automatically processes demand and supply requirements regardless of source with complete control of output and document creation.

Greater Optimization. Calculates critical parameters and uses well proven inventory planning   techniques to optimize supply/demand balances**.**

Seamless Integration. Integrates with all MaxQ Supply Chain Management Series modules. Leverages data from existing distribution & order management systems to improve supplier management and fulfillment processes.

Reduced Costs. Cuts inventory by reducing safety stocks and overstocks.

Increased Efficiency. Easy to use — automatically creates ERP Purchase Orders, Work Orders and Transfer Orders from Planned Orders; allows for immediate reaction to demand and supply changes.

Valuable Analysis. Multidimensional analysis provides complete inventory and organization reporting.

Additional Features / Functionality

- Flexible user defined shop calendar defining manufacturing, work, holidays & forecast days.

- Establish supply chain variables faster and easier by using a hierarchical setup.

- Built in Vendor Cost/Pricing tables similar to Order Management's Sales Pricing.

- Provides transfer order planning of distribution requirements for multi-site warehousing environments.

- Ability to adjust historical demands to remove effects of unusual demand.

- Flexible replenishment policies; supports eight different planning policies including: Reorder Point, Discrete, Max/Min, Days Supply, Make To Order and Multiple Drop Ship Methods.

Automate and Streamline your

Shipping Tasks

Enable your business to integrate your UPS Online®
WorldShip® terminal into your Microsoft Dynamics SL
Order Management workflow. Automate and streamline
shipping tasks and freight cost calculations to get the best
shipping rates, cut your shipping costs and improve
customer service. Provides many of the functions found in
Freight Manifesting, but is only for use with UPS Online®
WorldShip® management software.

UPS WorldShip Link

MaxQ's UPS WorldShip Link

This module enables you to integrate your UPS Online® WorldShip® terminal into your Microsoft Dynamics SL Order Management workflow. Automate and streamline shipping tasks and freight cost calculations to get the best shipping rates, cut your shipping costs and improve customer service. Provides many of the functions found in Freight Manifesting, but is only for use with UPS Online® WorldShip® management software.

Easily process shipments and send package details electronically to UPS from your desktop then monitor UPS shipments online. When you complete your shipment the tracking numbers and freight costs are forwarded back to the Microsoft Dynamics SL shipper.

Features / Functionality

- Seamless integration between Microsoft Dynamics SL and UPS Online® WorldShip®.

- Single point of data entry.

- Ability to add the capability to ship from multiple sites and use multiple UPS accounts.

Give your customer service representatives the ability to quote UPS shipping options. All the rate and zone tables are available in Microsoft Dynamics SL right from the Sales Order or Shipper screens.

Benefits

Superior Processes. Allows UPS Rates and Zones imports enabling freight shopping and quotes on UPS services from the Microsoft Dynamics SL Sales Order screen.

Greater Optimization. Utilize the functionality of UPS OnLine® WorldShip®, a free shipping   management software, by sharing Microsoft Dynamics SL data easily.

Seamless Integration with Microsoft Dynamics SL and OnLine® WorldShip® make training and installation easy and inexpensive.

Reduced Costs. Cuts administrative time. Simply scan or type the Microsoft Dynamics SL Shipper ID passes to give UPS OnLine® WorldShip® the address information it needs.

Increased Efficiency. Easy to use. Automatically prints carrier specific shipping labels and links tracking number to carrier web sites and download to Microsoft Dynamics SL rate tables.

Valuable Analysis. Tracking numbers and package freight costs are transferred back to the Microsoft Dynamics SL shipper to be invoiced.

Decrease Your Costs While

Improving Your Customer Satisfaction

The Accellos One Warehouse Link allows you to integrate the powerful distribution features of your Microsoft Dynamics SL system with the award winning Accellos One Warehouse Management System (WMS). Automate your warehouse and see your costs decrease while your customer satisfaction improves, giving you a strategic advantage.

Accellos One
Warehouse
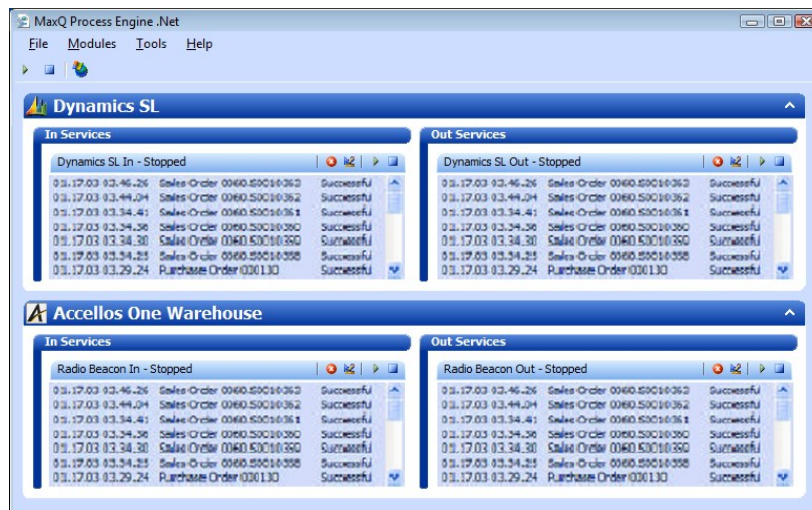# Link

Accellos One Warehouse Link

The Accellos One Warehouse Link allows you to integrate the powerful distribution features of your Microsoft Dynamics SL system with the award winning Accellos One Warehouse Management System (WMS). Automate your warehouse and see your costs decrease while your customer satisfaction improves, giving you a strategic advantage. With Accellos One Warehouse Link, your organization can manage shipping, receiving, transferring and all the physical handling of goods accurately and efficiently.

You will be able to control Order Management's fulfillment and shipment processes Purchasing/Receiving, Cycle Counts, Adjustments, Transfers and Kitting.

The Warehouse Interface Control Center is the heart of Accellos One Warehouse Link for Dynamics SL. This .NET service handles all the interfacing of information between Dynamics SL and the Accellos One Warehouse WMS. It provides a very flexible and scalable solution.

Benefits

- Seamless integration reduces installation and training costs.

- Microsoft Dynamics SL transactions are updated in real time as goods are put-away, picked, moved and counted in Accellos One Warehouse ensuring reporting is as current as the most recent bar code read in Accellos One Warehouse.

- Single point of data entry eliminates the re-keying of data to/from your warehouse management system.

- Streamlines operations and reduces errors for increased customer service and satisfaction.

- Enables bar coding capabilities for Microsoft Dynamics SL users that can range from simple data collection to sophisticated automation.

PROCESS STEP	# LINES	# UNITS	PACKSLIP	CUSTOMER #	SHIP VIA	REQUIRED DATE	SHIP NAME	STATE	SHIP COMPLETE	ZONE ?	EST TOT KG	VALUE GROSS
☑ Unallocate	1	15	0060S0010078	C315	B-EST	01/15/2003	Kevin Verboort	WV	N	1	0	5700.000
☑ Unallocate	2	18	0060S0010079	C300	B-EST	01/15/2003	Randy Reeves	IL	N	2		8910.000
☑ Unallocate	2	9	0060S0010080	C300	FEDEX	01/15/2003	Randy Reeves	IL	N	2		2960.000
☐ Unallocate	2	20	0060S0010081	C101	FEDEX	01/15/2003	Jim Stewart	OH	N	2		7600.000
☐ Unallocate	3	6	S0010073	C300	B-EST	01/08/2003	SCHOOL OF FINE ARTS	KS	N	3		2280.000
☐ Unallocate	3	11	S0010074	C315	B-EST	01/08/2003	Kevin Verboort	WV	N	3		4180.000
☑ Unallocate	1	10	0060S0010076	CT0120	UPS		Scot Schulte	IL	N	1		3800.000
☐ Unallocate	1	3	0060S0010077	CT0100	UPS	01/15/2003	Denise Smith	IL	N	1		1140.000
☑ Unallocate	3	6	S0010072	C300	B-EST	01/07/2003	SCHOOL OF FINE ARTS	KS	N	3		2280.000

Menu options shown: On/Off, Between, Allocate, Unallocate, Wave, Unwave, Ship, Nuke, Suspend, UnSuspend

Sales Order Shippers created in Microsoft Dynamics SL are seamlessly accessed in Accellos One Warehouse, enabling users to benefit from rich Warehouse Management features such as "wave picking" resulting in the best utilization of warehouse personnel, equipment and space.

You will be able to control Order Management's fulfillment and shipment processes Purchasing/Receiving, Cycle Counts, Adjustments, Transfers and Kitting.

- All necessary Microsoft Dynamics SL information is forwarded to Accellos One Warehouse in real time, eliminating double entry.

- Sales Order Shippers are handed off to Accellos One Warehouse for fulfillment using order steps – utilizing the flexibility of Microsoft Dynamics SL Process Manager to give you total control of the order management workflow.

- As shippers are confirmed in Accellos One Warehouse, all the packing, freight, and tracking information is forwarded back to Microsoft Dynamics SL for invoicing.

- Integrates with Microsoft Dynamics SL's eCommerce Gateway and Advanced Shipment Management modules for EDI and ASN requirements.

- As Purchase Orders are added in Microsoft Dynamics SL they are immediately made visible in Accellos One Warehouse.

- PO receipt information is forwarded back to Microsoft Dynamics SL for inventory update and automatic AP vouchering.

- Integrates Accellos One Warehouse inventory transfers, stock counts, and adjustments with Microsoft Dynamics SL.

- Light Manufacturing and Kitting are integrated to the Accellos One Warehouse which includes removal of component stock used in the Kitting operation.

Functionality to Support All Aspects of
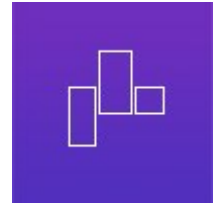
Supplier Managed Inventory

One of the most widely used partnering initiatives for improving multi-company supply chain efficiency. The VMI module enables suppliers to utilize information provided by the customer to monitor and replenish inventory levels at customer facilities. VMI provides complete functionality to support all aspects of supplier managed inventory programs for both managed and/or consigned inventory scenarios.

Vendor Managed Inventory

MaxQ's Vendor Managed Inventory (VMI)

One of the most widely used partnering initiatives for improving multi-company supply chain efficiency. The VMI module enables suppliers to utilize information provided by the customer to monitor and replenish inventory levels at customer facilities. VMI provides complete functionality to support all aspects of supplier managed inventory programs for both managed and/or consigned inventory scenarios. Perfect for managing and optimizing inventory at stores, tool cribs, etc, it combines sophisticated replenishment techniques, superior inventory transaction management and flexible billing options with excellent business intelligence and host integration to provide a complete solution that satisfies even the most demanding customer compliance needs.

See what is currently on-hand at this facility as well as what is available in the replenishment stock area and on purchase orders waiting to arrive.

Access instant product usage info to help make informed replenishment decisions. Shows previous 3 periods and YTD activity with comparisons to same time frames for previous years.

View and maintain parameters that control system generated suggested replenishments.

View and maintain an unlimited number of product cross references (customer number, vendor number, etc).

Managed and consigned transactions can co-exist and are billed in one consolidated invoice.

Billing schedules are configured at a partner and activity level (daily, weekly, etc.).

Billable transactions (shipments for managed items, usages for consigned items) are managed to a billing schedule.

Benefits

Superior Processes. Consistent order processing and shipments lower administrative costs.

Greater Optimization. Availability of detailed sales data for analysis results in higher customer satisfaction and retention and lower inventory levels through advanced replenishment techniques.

Seamless Integration. VMI accepts product usage and stock levels electronically via its defined API interface or standard EDI transactions containing product usage & stock level details from the client.

Reduced Costs. Cuts inventory excess by reducing safety stock and overstocks.

Increased Efficiency. Ease of use allows for immediate reaction to demand and supply changes.

Valuable Analysis. Multidimensional analysis provides complete inventory and organization reporting.

Features / Functionality

- Provides complete time phased planning at each facility/store to a user-defined shop calendar which defines manufacturing, work, holidays, and forecast days.

- Supports several industry planning policies including Reorder Point, Discrete, Max/Min, Days Supply and Order to Scan.

- Allows for handling of management fees in addition to billable transactions.

- Plan using forecasts generated from daily averages or a user-defined forecast.

- Allows the use of all Replenishment Values from Hierarchy.

- EDI Support for 852 – Product Data Activity to record effects of usage or inventory data.

- System calculated Lead Time, average daily usage, safety stock, and reorder point using weighted averages; enables actual versus budget tracking by account.

- Create planned replenishment orders for both independent and dependent demand by exploding demand from forecasts, sales orders, work orders, and transfer orders.

- Make recommendations for firm or in-process replenishments (cancel, reschedule in, reschedule out, surplus).

Automate the processes of building kits and managing components

Automate the processes of building kits and managing components. MaxQ's Auto Kitting module allows you to completely manage your inventory kitting needs. As sales orders are entered, kits can be setup to automatically be created and received into inventory as needed, allowing the shipper (pick ticket) to be created as expected.

Auto Kitting

MaxQ's Auto Kitting

Automate the processes of building kits and managing components. MaxQ's Auto Kitting module allows you to completely manage your inventory kitting needs. As sales orders are entered, kits can be setup to automatically be created and received into inventory as needed, allowing the shipper (pick ticket) to be created as expected. Component shortages are analyzed and reported on, given you complete control of the shortage process. As components are received the appropriate kits will automatically create. A kit component shortage report can be run at any time detailing any kits that are short inventory.
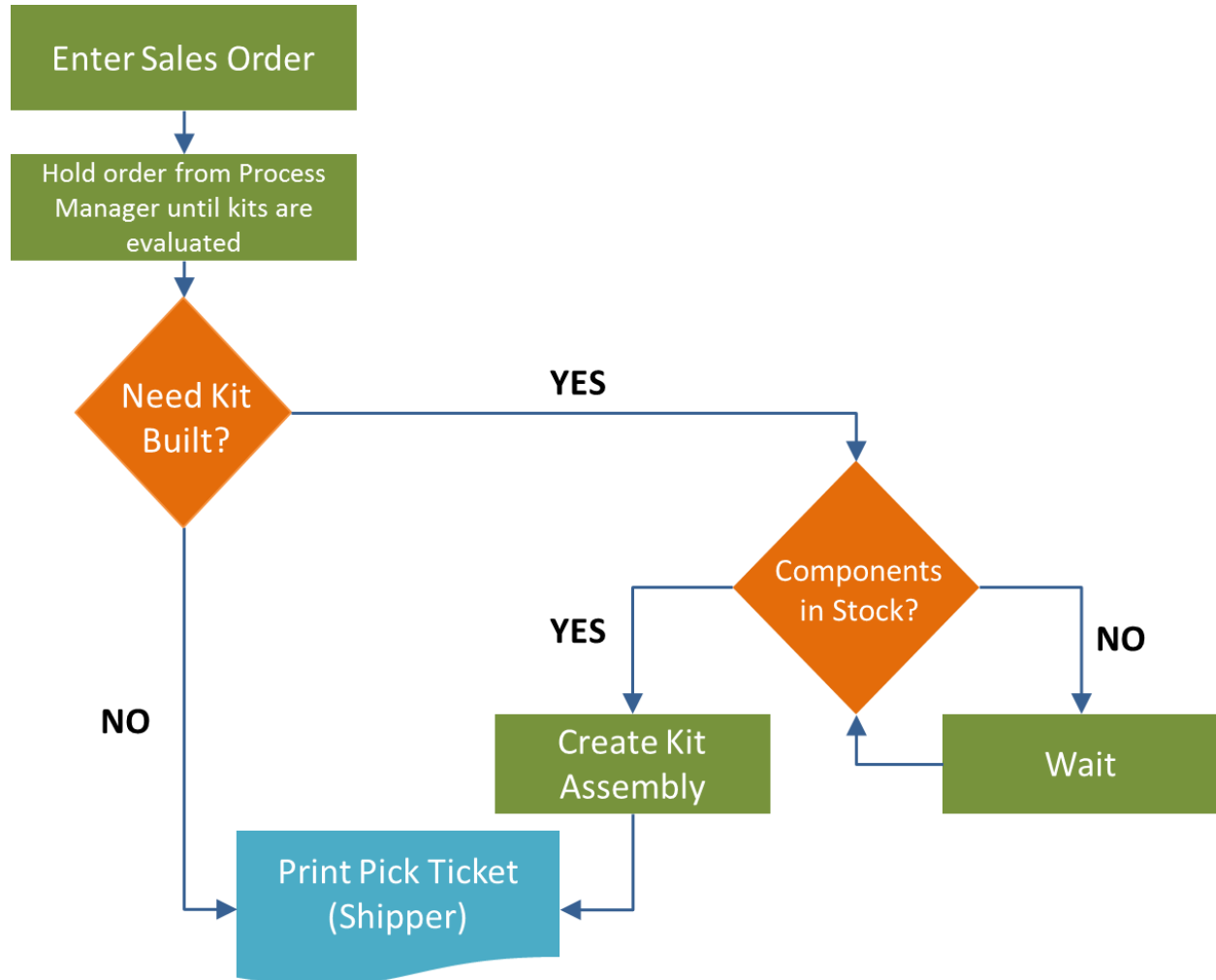
Features

- Automatic creation and receiving of kits required by a sales order

- Analyze component inventory optionally hold orders that have kits that are short components

- Automatically build kits as component inventory is received

- Pick ticket (shipper) can optionally be printed with kit components details

Benefits:

- Build kits as they are ordered

- Inventory of kits and components are much more accurate

- Shortens time needed to ship, no longer wait for manual kits to be assembled before shipper can be created

- Reduce inventory, better manage components

- System continually manages components and releases kit assemblies when appropriate

- Easy to use, flexible and efficient

Auto Kitting Process

```
┌─────────────────────┐
│  Enter Sales Order  │
└─────────────────────┘
           │
           ▼
┌─────────────────────┐
│ Hold order from     │
│ Process Manager     │
│ until kits are      │
│ evaluated           │
└─────────────────────┘
           │
           ▼
      ◇ Need Kit          YES          ◇ Components
        Built?  ──────────────────►      in Stock?
           │                          YES ╱      ╲ NO
          NO                     Create Kit      Wait
           │                     Assembly
           ▼                          │
  Print Pick Ticket ◄─────────────────┘
     (Shipper)
```

Need Kit Built? — YES → **Components in Stock?**

Components in Stock? — YES → **Create Kit Assembly**; NO → **Wait**

Need Kit Built? — NO → **Print Pick Ticket (Shipper)**

Supply Chain Management Series

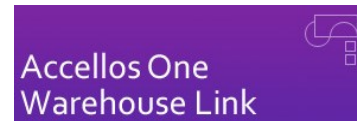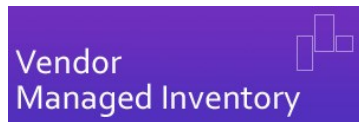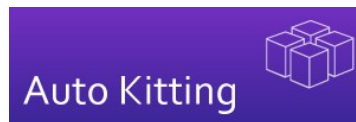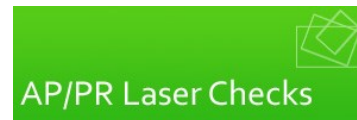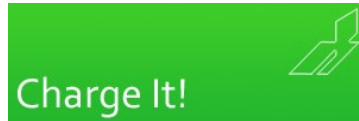|		
Advanced Forecasting	Demand Planning	Freight Manifesting
Matrix Inventory Management	Request for Quotation Management	Service Order Management
Supply Chain Planning	UPS Worldship Link	Accellos One Warehouse Link
Vendor Managed Inventory	Auto Kitting	
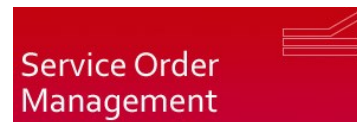
Financial Management Series

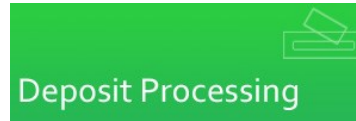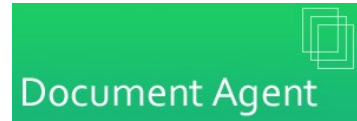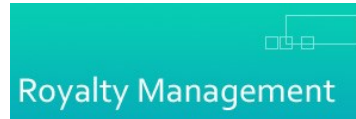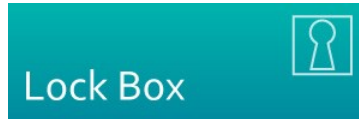|		
Advanced Cash Application	EDI Remittance	AP/PR Laser Checks
Charge It!	Deposit Processing	Document Agent
Recurring Billing & Revenue Recognition	Royalty Management	Vendor Rebates
Lock Box		

Business Intelligence Series

eProphet	QVision

MaxQ Technologies, Inc.

100 Reserve Rd.

Suite CC250

Danbury, CT 06810

sales@maxqtech.com

www.maxqtech.com

203-748-0481

Microsoft Partner

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Gold   Business Intelligence
Silver Enterprise Resource Planning