



**For**

**Independent Timber Merchants**

**Feature Guide**

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Associated Document: Maxim For Quoting & Job Costing  
Manufacturing User Guide

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# Maxim For Independent Timber Merchants – Feature Guide

## Introduction

**Maxim** provides an enterprise wide, business and accounting software solution to timber merchants who require more than off the shelf software.

Maxim is fully integrated, industrial strength with powerful features, is an affordable solution with low ongoing maintenance costs.

Maxim has functionality that enables multi branch company structures achieve Group Control. This results in significant Group efficiencies and better bottom line results....

### **A Maxim user's thoughts on Maxim.....**

From Roger Levie:           *“When I think Maxim I think the following:*

- *fully integrated, industrial strength, powerful features,*
- *affordable solution – I would imagine that there are many large companies around that have spent six or seven figure sums for products such as Oracle Financials or SAP, that would have ended up with far less capability than we had in the NHLL/PCNZ system,*
- *can grow with the business – a Maxim user should be set for life no matter how big their business grows...certainly it should offer a good long term solution for most businesses.*
- *easy to track data through the system – can easily see the impact of an entry through the system making it easy to sort out errors or explain strange results,*
- *quick, easy and relatively inexpensive to modify your specific business requirements,*
- *developer has good knowledge of business processes,”*

## Guide Cannot Show All Features

This guide cannot show all the features that are available within Maxim. It is intended to highlight the key features.

## Your Business Requires Competitive Advantage

Maxim is able to provide software and support that will:

***Put Your Business In Front Of Your Competitors***

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Maxim's view is that to get in front of your competitors and to then remain in front, requires systems and processes to be continually reviewed and refined. Change becomes an ongoing requirement, as new ideas are presented and incorporated into systems and processes.

## Coping With Change

Maxim has a track record of being able to cope with change. Maxim is able to deliver system changes in a timely and cost effective way. When changes are required it can be quite difficult for users to understand the full impact of change requirements. Users are also very busy coping with day to day requirements, so it can be difficult for them to respond appropriately.

Maxim uses prototyping as the methodology to deliver change. This is the best solution to be able to keep moving forward. Putting something in front of users to use, in a controlled way, is a sure way of getting them to tell you whether it is right or wrong.

The development tool Maxim uses is called Magic. The Magic paradigm enables us to prototype system changes in a controlled way to achieve results.

*What you have or need today, will be different tomorrow.*

## Maxim Will Work With Industry Groups

Maxim will work with industry groups to continue to improve competitive advantage.

The group, for mutual benefit, can share system enhancements and ideas.

## Your Industry Is Competitive

The timber merchants industry is very competitive, so therefore systems need to be able to provide ways that enable one industry group to do it better than another industry group.

Some key elements to this include:

### **1. Better control of trading gross profit margins.**

- This requires tight control of inventory costs and inventory selling prices.
- Requires up to date supplier costs to ensure that actual supplier invoice costs match system costs.
- Require an effective price book.

### **2. Superior Customer Service**

- Giving the best possible prices to customers – while maintaining adequate margins.
- Providing accurate and timely quotes.

- 
- Delivering products on time and to the correct site.
  - Electronic dispatch of documents as appropriate.
  - Information for builders such as comparison of job quantities quoted against job quantities dispatched.

### **3. Better Credit Control**

- Accurate and timely dispatch of quotes, invoices and statements to customers.
- Customer incentives to pay on time, such as settlement discounts.
- Good credit control practices, including recording of notes and reporting and credit follow up.

### **4. Effective Tracking Of Purchase Orders**

- Avoid ‘costs falling through the cracks’ – ie, products delivered and paid for but not billed to customers.
- Tight control of purchase orders, dispatching and invoicing and matching purchase orders with supplier invoices.

### **5. Effective Tracking Of Job Costs**

- Integrated processing of transactions to a job.
- Purchase Orders linked to jobs.
- Compare job costs with quoted cost.

## **Summarised Maxim Overview**

### **Data Base Structure**

Multiple corporate databases.

Each corporate database can contain multiple business structures.

A corporate database provides facilities for enhanced group reporting.

### **Accounting Periods**

There are no month end rollovers required.

Accounting period settings control logical month end cutoffs.

Individual user settings control the selection of accounting periods – Point of sale users get an accounting period based on today’s date. Back office users can get an accounting period based on the current period setting. This allows for real time processing to occur.

Financial year-end is no different to month end – real time business processes continue on while year-end financial reports are finalised.

### **Data Input**

All Maxim functions and processes are fully integrated, data is entered once.

A transaction can be processed to multiple ledgers.

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Database updates occur in real time. There is no subsequent batch processing required to present data to users.

Data updates are protected by transaction processing techniques.

Transaction input can occur to any open accounting periods.

Transaction input errors can be corrected without the need to generate subsequent journal entries.

### **Reporting**

Reports can be produced for any accounting period.

Reporting within a prior year is available.

Reports can be scheduled to run in ‘off peak’ and in a client and server environment reports can be ‘batched’ and run from the server.

### **Inquiry Screens**

Inquiry screens ‘drill down’ to the original transaction input screens.

### **User Rights**

Full User Right allocation capabilities are available to ensure that users only have access to appropriate screens.

## **Product File**

### **Finding A Product**


There are a number of links to your products that make locating the correct product quick and easy:

- Supplier bar code
- Supplier product code
- Your unique stock number – SKU number
- Your product code
- Key words that are derived from the product’s name

Supplier Links Search							
Company	BarCode	Supplier	Supplier Product Code	StockNbr		SupplierPrice	Effectiv
HAST		ABLECNL	ROUTERBITST6.35	13587	STARTER 6.35MM TRITON ROUTER BIT SET	43.50	01/09/2
HAST		ABLECNL	SANDERTRITON	13672	TRITON RANDOM ORBITAL SANDER	43.85	01/09/2
HAST		ACCET	313527	14466	CM4SB DIAMOND BLADE		
HAST		ACCETL	JIGSAWBLADESH21	11567	NO 21 HITACHI JIGSAW BLADES		
HAST		ACMEOSL	RH11	9223	STAPLER RAPID 11 MEDIUM HAMMER		
HAST		ACMEOSL	SYR100M	9225	TAJIMA TAPE 100 M		
HAST	049296014391	ACMEOSL	LC650RH	14055	TAJIMA LC650 CUTTER & BLADES		
HAST	4975364014276	ACMEOSL	LCB50	10461	10 PIECE TAJIMA KNIFE BLADES LCB50		
HAST	4975364020109	ACMEOSL	LC500C	10957	LC500 TAJIMA KNIFE		
HAST	4975364020871	ACMEOSL	LC650C	15014	LC650C TAJIMA UTILITY KNIFE		
HAST	4975364020888	ACMEOSL	LCB65	11196	10 PIECE TAJIMA KNIFE BLADES LCB65		
HAST	4975364021762	ACMEOSL	LC520C	15154	LC520C TAJIMA UTILITY KNIFE		
HAST	4975364024718	ACMEOSL	G257	14080	G257 TAJIMA 7M TAPE		

Ava Stock: EA 4.00	Product Note	Supplier Links
Name: LC500 Tajima Knife "Rock Hard"		
Supplier: Acme Office Supplies Ltd		
Select	Edit F5	New Item F4
Pricing	Loc Inquiry	Search
Merge Item	Delete Item F3	





## Supplier Price Updates

The supplier link records also enable supplier price changes to be quickly applied to your products.

A supplier price update creates a price change file. This file is checked, price changes are committed and price labels printed.

## Timber Products

### Properties

Timber products are controlled by properties. Properties describe the product and build the product code and short and long names.

Group: TRA Timber - Radiata StockNbr: 3038  
 Product: 100050RADH1SWNN1F Nbr of Locations: 1  
 Created: JOHNK 30/05/95 15:02:20  
 Confirmed:JOHNK

Short Name: 100 050 RAD H1 SWN NTF  
 Long Name: 100 x 50 mm Radiata H1 Sawn No1 Framing  
 Category: TIMBER RADIATA FRAMING NO1 SubCategory: H1

Status: AVA Available for Sale  
 Pack Information: 100x050xSWN 100x50 - Sawn  
 Substitute:

Buttons: Supplier Links, Notes

Property Details		
Title	Value (Table)	Unit
Width	100	MM
Thickness	x 50 mm	MM
Species	Radiata	
Treatment	H1 Treated	
Condition	Not Applicable	
Finish	Sawn	
Grade	No1 Framing	
Length (if applies)		

### Volume Calculations & UOM Conversions

Properties are also used to calculate freight volumes and conversions between M3 and LM. Timber can be purchased in M3 but sold in LM. Stock holding can be in M3 so there needs to be the ability to do conversions based on the size of the timber. The width and thickness properties are used to do this.

**PRPAKM:Standard Info**

Code: 100X075XD4S 100X75 - Dressed 4S  
 Product Group: TRA Timber - Radiata

Freight  
 Volume: 0.78000000 Units: M3 Cubic Metres  
 Weight: 0.00000000 Units:  
 Mask:

For Batch/Serial Nbr Tracking - How Sold By: Each Special Instructions

From	To	Multiply 'From' By		
LM	M3	0.00750000	1 LM = 0.0075 M3	1 M3 = 133.3333 LM
LPU	M3	0.00750000	1 LPU = 0.0075 M3	1 M3 = 133.3333 LPU

## Freight Volume

The UOM conversions are used to calculate freight out and freight costs on goods inwards.

## Stock Takes

Product can be located to multiple bins in multiple stock locations. Stock takes can be by bin or locations and done on a cyclic basis. Stock takes happen in real time and do not require the business to be *shut down* while stock takes take place.

## Stock Valuations

The default costing is moving average cost. Standard cost can be used for costing. Last cost is also available.

## Pricing

Pricing routines can be customized to suit client requirements. Shown are some examples. Pricing routines will detect the best price taking into account discount structures, promotions and customerised pricing.

Price labels can be printed.

Can have multiple sale units for a product, M3 & LM, EA & BDL as examples.

## Discount Levels

Products are allocated to a category / sub category.

The retail price is computed based on a standard markup percentage allocated to a category / sub category.

Customers are allocated a discount level.





## New Clients

Maxim generates the client code and at the same time checks for possible client duplicates.

GenerateClientCode	
SLQAJ	Jo-Anne Sloane, 5 Bute Street, Linwood, CHRISTCHURCH
SMALB	Barbara Small, 28 Alexandra Street, Richmond, Christchurch
SMARCR	Smart Collision Repairs, PO Box 11278, 15a Smarts Rd, CHRISTCHURCH
SMARDPP	Smartlock Digital Pty Pty, P O BOX 894 Artarmon NSW 2064, 59 Whiting Street,
SMARRPA	Smarts Road Panel and Paint, PO Box 11-278, 15 Smarts Rd, CHRISTCHURCH
SMIT	Mrs A. Smith, 11 Branston Street, Hornby, CHRISTCHURCH
SMITB	Barry Smith, 24 St Clio Street, Ilam, CHRISTCHURCH
SMITCSL	Smiths City (Southern) Ltd, P O Box 2343, CHRISTCHURCH
SMITDL	Smith Developments Ltd, Level 3, Langwood House, Cnr Oxford Tce & Armagh St, P
SMITHB	Jan Smith Barrett, 32 Raekura Place, Redcliffs, Christchurch
SMITK	Karl Smith, 41 Blake Street, South New Brighton, CHRISTCHURCH
SMITM	Michelle Smith, 54 Olivine Street, Shirley, Christchurch

Generate Client Code	
Company or T/A:	
Surname:	Smith
Title:	
First Name1:	
First Name2:	
First Name3:	
Client Code:	SMIT
Name:	Smith

Client code already exists

## Point Of Sale

### Full Point Of Sale Functions

Point of sale screens can link to cash drawers, cash slip printers and standard printers.

Full cash control is provided

### Credit Control

Maxim tracks customers with a credit limit and will not allow a sale if credit is exceeded.

SALE:Sales		ControlNbr: 1139		Available Credit: \$ 355.93		Depth 11		
Customer: MR D R OLIVER HERNE BAY AUCKLAND				Customer: OLIVDR	Date: 11/07/01			
COST				InvNbr: 1088	Department: ROT			
				Order No:	ROBERT			
				Sales Rep: SKELRG	Yard Man:			
				JobNbr/Ref:				
J D C Q P L V X M								
Type	Select Item	Loc	Batch	Qty	UOM	UOP	Price	Line Price
GL	1660 Motor Expenses			1.000	EA	EA	100.000	E 100.00
SKELRG								
GL	1660 Motor Expenses						500.000	E 500.00
SKELRG								
<div style="border: 1px solid black; padding: 5px; display: inline-block;"> <b>Error?</b>                      Credit will be exceeded with this item. F2 To Cancel Line.                 </div>								
<input type="button" value="Next"/> <input type="button" value="Price"/> <input type="button" value="Item Inq"/>				<input type="button" value="OK"/>		<input type="button" value="Paid"/> <input type="button" value="Credit"/>		
FreightVolume:								
						Total:	100.00	
						GST 12.50%	12.50	
						Rounding:		
						Total:	\$ 112.50	



SAOE: Sales Orders						
Customer: MS S A SKELLERN 471 SPENCER ROAD LAKE TARAWERA RD5 LAKE TARAWERA, ROTORUA EMPLOYEE 02 Confirmed			Customer: SKELSA	Date: 03/01/01	OurOrderNbr: 108	
			DateReqd: 03/01/01			
			CustOrdNbr:			
			Sales Rep: SKELRG	ROBERT		
			Yard Man:			
			JobNbr/Ref:	I J D C O L Y P		
Product	Quantity	U00	Current SOH	PO Qty	Supplier	PO Number
Battery 12 Volt	2.00	EA	15.00	2.00	BATMAKE	171
Plain Bend	1.00	EA	4.00	0.00	FIRESTO	0
Nails 100mm	1.00	EA	-9.00	0.00	BSL	0
Douglas Fir , Boxing , Rough Sawn , H3 , 150 x 40 , F	0.858	M3	19.142	0.858	TUMU	172
Create PO's				View PO		
<Enter> to next line to enable Create PO's button.				BATTERY, MAKERS, NZ LTD		
Zero PO Qty column to exclude item from a PO.				Confirmed		
					Total:	\$ 740.80
					GST 12.50%	\$ 92.60
					Total:	\$ 833.40
SF1 CLIENT	SF2 ARBIN	SF3 SALE	SF4 DEP1	SF5 DBANK	SF6 SAOE	SF7 PRSRCH SF8

## Sales Invoicing

A sales invoice can include multiple sales orders and multiple dispatches. Full audit control processes are provided for invoice checking. Invoices can be printed in batches. Free text comments can be added to invoice lines.

# Credit Control

## Settlement Discount

As an incentive to pay, customers are invoiced the Retail Price with discount shown as a settlement discount. This is deductible if paid by the due date.

**ARBIN:Customer Inquiry** Ledger: Customers  
 CASHS Cash Sale Added: 17Apr2000 Chgd: 27Aug2001  
 Invoice Amount Due

B/Ph: 068763011 Group Customer As At: **31/08/01** Bal At Previous Month End  
 Mob: View Main Ledger Transactions Open Items Balances At Todays Date

01Sep00	CUTS Client Code = 2081	CONV
---------	-------------------------	------

Balances		Discount		TRADE1	
As At:	31/08/01			Credit Limit:	CASH
Amt Due	5,521.13	%	1,383.03	Pay Method:	Cash
0-30 Days	5,371.59	97	1,383.03	100	
30-60 Days	27.45				
60-90 Days	31.26	1			
>90 Days	90.83	2			

Last Pay:	885.74	31/03/01
Last Purch:	2.16	13/09/01
Sales YTD:	5,627.73	
Charge To:		

## Credit Control Notes

Customer notes are entered detailing credit action taken. This information plus overdue balance details and other information is presented in a monthly report for management.

**ARBIN:Customer Inquiry** Ledger: Monthly  
 SKELRG5 He promised to pay 2 weeks ago. Said the cheque was in the mail. Rang him today. Chgd: 01Sep2001  
 etc..etc

B/Ph: 0738 Bal At Previous Month End  
 Mob: Balances At Todays Date

01Sep01	He promised to pay 2 weeks ago. Said the cheque was in the mail. Rang him today.	>	sasdev
01Sep01	Contacted customer again today.		sasdev

Balances		Discount		RETAIL	
As At:	30/09/99			Credit Limit:	10,000 SMALLBUS
Amt Due	11,271.13	%		Pay Method:	On Account
0-30 Days	595.00	5			

## Customer Alias Codes

Customers can be given additional customer codes. These alias codes allow for the customer to be recognized from Priority cards and Farmland cards, for example. So when a customer at the point of sale provides a priority card, the card number alias will find the correct customer account.

The screenshot shows a customer record form for 'Famlands Trading Society'. The address is 'Private Bag 9004, Hastings' and the tax invoice GST number is '11-509-878'. The record was added on 26 Apr 2000 and changed on 17 Mar 2001. A 'Customer Aliases' dialog box is open, displaying a table of aliases:

Customer	Alias
HAYDA	F10105
HAYDA	HAYDA

The dialog box also has fields for 'Full Name', 'Copy', 'Title', 'First Name', and 'First Name2'.

## Customer Rebates

Customers can be linked to a rebate group.  
Rebate reports can be produced.

## Group Buying Requirements

Group suppliers are linked to the buying group supplier. Purchase orders are issued direct to a group supplier, but payments are made from the buying group supplier.

Maxim allows selection options when paying suppliers. The group buying supplier can be paid in a separate payment run from other suppliers.

The screenshot shows the 'APSELI: Pay Suppliers' dialog box. The ledger is 'AP, Suppliers'. The 'Include Item Reference Field?' checkbox is checked. The 'For Due Date' is '21/10/01'. The 'Include' dropdown menu is open, showing options: 'All Suppliers', 'Group Buying Supplier Only', and 'Exclude Group Buying Supplier'. The 'Print Unpaid Invoices' button is visible. Below, there are checkboxes for 'Allow System To Select All Approved Invoices For Payment' and 'Or, You Select Individual Suppliers To Pay'. The 'For Due Date' is '21/10/01'. The 'Include Bank Debits?' checkbox is checked. The 'Include Cheques?' checkbox is checked. The 'Include Direct Credits?' checkbox is checked. The 'Priority Payment Selection' section has 'From Priority (0-4): 0' and 'To Priority (0-4): 0'. The 'Commit Payment' section has a 'Print Selected Invoices' button and an 'Include Item Reference Field?' checkbox. The 'Processing Status' is 'No'.

## Multiple Company Structure

Maxim provides for one inventory file with separate company price files. Companies can create new products. New product verification and product maintenance is controlled from one point.

This structure allows for all group trading companies to view stock holdings at other locations and to access other relevant information. This provides for enhanced group reporting and control.

**LOCIQ06: StockLocationInquiry()**

LC650TAJIMACUTTERBLADES TAJIMA LC650 CUTTER & BLADES  
HAND TOOLS - KNIVES & ACCESS

Pricing

Customer: CASHS Cash Sale TRADE1

Retail	Disc: 10.00%	Net	GST Incl	EA	Loc: HW
17.55	1.76	15.80	17.78	EA	
Promo Price.....>		13.00	14.63	To: 31/10/2001	Promotion

Last Sale Date: 13 Oct 2001  
Last Sale Qty: -3.000 EA  
Last Rcpt Date:  
Last Rcpt Qty:  
Unit Cost: \$ 8.770 EA  
Last Purch Price: \$  
Standard Cost: \$ 8.770 EA

Loc	Unit	OnHand	Allocated	Available	P/Os	S/Os
HHW	EA	-6.000		-6.000		
D SH	EA					
GHW	EA	-5.000		-5.000		

StockNbr: 14055 PGroup: HDW  
Bin Loc:  
Supplier ACMEOSL  
Acme Office Supplies Ltd

Select Merge Locn Pricing Purch Costs History Trans Batches POs SOs

### Group Customers

With a corporate group database structure, customers who buy from different group companies can be identified as a group customer. This provides advantages in terms of reporting and credit control.

**ARBIN - CASHS**

Ledger: Customers  
Added: 17Apr2000 Chgd: 27Aug2001

CASHS Cash Sale

Invoice Amount Due

B/Ph: 068763011 Group Customer As At: 21/10/01 Bal At Previous Month End  
Mob: View Main Ledger Transactions Open Items Balances At Todays Date

**View Group Customer - Cash Sale**

Totals:	8,547.61	(228.40)	2.16	5,600.28	3,173.57		5,629.89
---------	----------	----------	------	----------	----------	--	----------

	Amt Due	Current	Odue1	Odue2	Odue3	LastPay\$	LastPayDate	SalesYTD
DVKE	0.00						00/00/00	
GISB	3,024.32	0.29			3,024.03	0.08	06/03/01	
HAST	5,523.29	(228.69)	2.16	5,600.28	149.54	885.74	31/03/01	5,629.89

60-90 Days	5,600.28	101	1,405.91	102	Last Purch:	2.16	13/09/01
>90 Days	149.54	3			Sales YTD:	5,629.89	
					Charge To:		

SF1 CLIENT SF2 CLTNOT SF3 CLTCON SF4 ARTIN SF5 ARCOI SF6 ARDRT SF7 CLTQ2 SF8 APBIN

### Purchasing

Issuing purchase orders and linking the receipting of goods back to the purchase order maintains a tight control over purchasing.

### Preferred Suppliers

Preferred suppliers can be allocated to products. When creating a purchase order a warning is given when purchasing a preferred supplier product from another supplier.

## Allocation Of Freight

The freight component of timber is a significant cost of product into store. Maxim provides a system that ensures that freight costs are taken into account at the time of a stock receipt. Maxim will automatically create a carrier supplier invoice.

OrderNbr	OrderDate	Order Value	OrderedBy	OrderType
964	20/02/01	\$ 9,120.00	ROBSA	SD(DailyOrder)
976	21/02/01	\$ 4,196.00	METEB	SD(DailyOrder)
994	23/02/01	\$ 7,097.00	METEB	SD(DailyOrder)
1006	26/02/01	\$ 1,587.50	ROBSA	SD(DailyOrder)

Line	Description	Order Nbr: 976	Code	UOM	Rec Qty	Freight M3	Sel?
1	100 x 50 mm Radiata Untreated Kiln Dried Sawn No1 Clears		100050RADUTKDS	LM	400.000	2.000	<input checked="" type="checkbox"/>
2	150 x 50 mm Radiata Untreated Kiln Dried Sawn No2 Clears		150050RADUTKDS	LM	300.000	2.250	<input checked="" type="checkbox"/>
3	200 x 50 mm Radiata Untreated Kiln Dried Sawn No2 Clears		200050RADUTKDS	LM	200.000	2.000	<input checked="" type="checkbox"/>

## Quoting And Job Costing

Maxim provides for quotes to be provided accurately and timely. Quoting links directly to the inventory files and to the pricing routines relevant for the customer.

Plant	Cost	Charge	Quoted	M	1.Quoted Price (Fixed)	2.Quoted Materials	3.Actual Cost	%
Material	2,987.23	5,720.60	5,720.60	2,733.37	91.50%	47.78%		
Labour	0.00	0.00	0.00	0.00	0.00%	0.00%		
Sub Contracts	0.00	0.00	0.00	0.00	0.00%	0.00%		
Job	2,987.23	5,720.60	5,720.60	2,733.37	91.50%	47.78%		
		GST: 0.00	Quoted Total: 5,720.60					

Quotes can be split by levels or options. This allows for house lot jobs to be efficiently quoted. An interface to The Estimator will be provided.

Quotes cater for special buy-ins with associated purchase order control.

Quote templates can be created.  
 Quotes can be copied.

Fixed price quotes allow for items such as kit set sheds to be quoted at a fixed price. The materials in the quote are dispatched to site, with any product or quantity variances recorded in the job. When the job is completed you are able to compare the actual result against the quote.

ID Nbr	Accept?	Material	Labour	SubContract	Plant
1	<input checked="" type="checkbox"/>	STEEL	1,167.00	0.00	0.00
2	<input checked="" type="checkbox"/>	FOUNDATION HARDWARE	10,936.23	0.00	0.00
3	<input checked="" type="checkbox"/>	MASONRY	1,411.00	0.00	0.00
4	<input checked="" type="checkbox"/>	GROUND FLOOR FRAMING	585.98	0.00	0.00
5	<input checked="" type="checkbox"/>	INTERMEDIATE SUB FLOOR	5,071.30	0.00	0.00
6	<input checked="" type="checkbox"/>	FIRST FLOOR FRAMING	285.70	0.00	0.00
7	<input checked="" type="checkbox"/>	ROOF FRAMING	3,958.99	0.00	0.00
8	<input checked="" type="checkbox"/>	EXTERIOR LININGS	3,567.98	0.00	0.00
9	<input checked="" type="checkbox"/>	INSULATION	1,853.30	0.00	0.00

Product dispatch from a quoted job will be priced at the quote price. Products not included in the quote are treated as Extras so these items can be identified in the job.

The dispatch of quoted jobs is tracked to provide valuable information for both your business and for example your builder customer. You are able to determine from the original quote what you actually ended up providing the builder. Although your quote was successful – did the builder continue to shop around and purchase quoted items from other suppliers? You can provide information to the builder such as a comparison of what was quoted to what was actually delivered on site. Why the variances – how accurate was the estimator - was product misappropriated?

# Kits

Kits provides the ability for you to sell items such as pre-hung doors and made up gates. The components that make up these products are included in a kit. Non inventory components such as labour can be included in a kit. At sale time the kit components are deducted from stock but the customer only gets invoiced for a pre-hung door.

**KITS: Maintain Kits** \_ \_ X

ProdGrp: PHD Pre Hung Doors UOM: EA Each

Kit Id: DOOR1 Std Quantity: 1.000

Name: Door 1 Invoice Format: Kit Only

StockNbr: 15600

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For Effective Date: 01/11/2001  Kit Price: \$ 121.10

Comment: Kit Cost: \$ 62.61

Margin% 48.30%

Item	Loc	Activity	Std Qty	InvQty	UOS	Unit Price	Price/Cost
901840RADBUTTHINGEF/B 90 mm 1840 Radius Butt Hinge F/B	HW	MATERIAL	3.00	3.00	EA	3.05	9.15 3.63
M71F/J 125 x 40 mm Radiata Finger Jointed Slim Line Door Jamb (Moulding No.71)	EX	MATERIAL	5.00	5.00	LM	11.70	58.50 23.35
1980460MDFHCFPD 1980 mm x 460 mm MDF H/Core Plyco Flush Panel Door	HW	MATERIAL	1.00	1.00	EA	53.45	53.45 35.63
<input type="button" value="Pricing"/>						7532	

SF1 SF2 SF3 SF4 SF5 SF6 SF7 SF8

## E\_commerce

Maxim provides workable e\_commerce type solutions.

Documents such as purchase orders, quotes, invoices, statements supplier payment advices can be sent directly from Maxim by email or efax.

Reports can be emailed or efaxed to recipients.

Other e\_commerce solutions will be provided as they become available and can be introduced to clients.

PO Nbr	Date	Supplier	Order Value	Status	eDoc
4058	04/10/00	LOCKAL	4,296.98	Confirmed	
4125	19/10/00	LOCKAL	411.64	Confirmed	
4148	24/10/00	LOCKAL	919.96	Confirmed	
4178	01/11/00	LOCKAL	132.51	Confirmed	
4185	01/11/00	LOCKAL	3,345.66	Confirmed	
4213	08/11/00	LOCKAL	563.50	Confirmed	
4227	25/01/01	LOCKAL	8.80	Confirmed	Yes
4252	29/04/01	LOCKAL	76.55	Confirmed	
4262	25/01/02	LOCKAL	271.00	Open	
4266	12/09/02	LOCKAL	17.60	Open	
4341	12/09/02	LOCKAL	26.40	Open	
4342	12/09/02	LOCKAL	35.20	Open	
4354	13/09/02	LOCKAL	1.00	Open	
4355	13/09/02	LOCKAL			
4351	13/09/02	LOGI			
3676	04/07/00	ROLL			
4239	15/02/01	SECL			
4240	15/02/01	SECL			

**Confirm**  
A Non Priced Purchase Order will be sent electronically to: LOCKAL . Is this Ok?  
No Yes

Lockwood Arrow Ltd  
P O Box 59 219  
Mangere Bridge  
AUCKLAND

Ordered By: sasdev SD(DailyOrder)

Efax or Email Order  
eDoc Not Priced eDoc Priced  
robert@maxim-software.co.nz

Print Order  
Not Priced Priced

Filter View By:  
To Re-send eDoc View Closed Orders

Edit Order F5 New Order

SF1 CLIENT SF2 CLTNOT SF3 CLTCON SF4 CLTTAB SF5 APBIN SF6 APCOI SF7 APRECB SF8 SAOEB1

There has been a lot of talk and hype in respect to e\_commerce and electronic supply network type solutions. There has also been of recent times significant failures in this area. It is Maxim’s strong view that if an organization gets involved in these new technologies, with out the underpinning of a sound business accounting system, with appropriate business processes in place, they will fail.

Simply e\_commerce type solutions can make ‘things’ happen a lot faster. An organization has to be able to cope with this requirement and be comfortable dealing in a new medium.

Print or Email Doc

**Print Doc**

Print Invoice

eDoc Invoice

robert@maxim-software.co.nz

## Full Forms Logo Support

Full support is provided for printing a company logo on forms.

## E\_Intelligence

Maxim lets you know immediately, by Email when action is required:

- When goods have been received for a customer – better customer service.
- When goods have been received for a job – more efficient control of jobs.
- When inventory costs have moved outside of the norm – has there been a mistake, do prices need to be increased.
- Job costs have exceeded budget (Quote).

## General Ledger

Maxim provides full general ledger integration, including:

Cash book management  
 Financial reporting  
 Budgeting  
 Fixed Assets

## Sales / Customers

Flexible allocation of customer table attributes, such as customer type, area, discount table, etc.

Full customer sales and gross profit history available.

Comprehensive reporting and on line inquiries for customer control is provided.

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## **Purchases / Suppliers**

Flexible payment methods – computer cheque, direct credit, bank debit, manual cheque.

Flexibility in paying suppliers – on hold, supplier payment priority.

Comprehensive reporting and on line inquiries for supplier control is provided.

Full supplier purchasing history available.