Database: Date:

**Pilot Testing – Items to Check**

Here are the basic things to run through modified by any local processes that extend or alter them.

Please expand on these as you see fit.

Make sure users can add/change and delete the following and perform these processes.

1. System Manager
   1. Review System Switches (especially note the Costing section – new functionality)
   2. Run Batch Process
   3. Check User Security – enable all for MANAGER
   4. Report Viewer
2. Stockrooms
3. Part Numbers
   1. Part Notes
4. Costs
   1. Check your cost and Inventory Value Version to Version make sure these numbers match.
5. Bills of Material – Same as parts
   1. BOM Notes (Reference Designators)
6. Purchasing and Sales Order Processing
   1. Ship Via Codes
   2. Terms Codes
   3. Tax Codes
   4. Currency Codes
7. GL Accounts
   1. Stockroom
   2. Default
   3. Override
8. Purchasing
   1. Buyers
   2. Vendors
   3. Part Vendor data
   4. Manufacturer Part Number
9. Sales Order Processing
   1. Part Sales
   2. Sales Reps
   3. Customers
   4. Customer Ship To Addresses
   5. Customer Part Number
   6. Customer Based Pricing
   7. Customer Type discounts
10. Inventory Transactions
    1. Adjustment
    2. Cycle Count
    3. Receipts
    4. Issues
    5. Subcontract Transactions
11. Shop Floor
    1. Work Centers
    2. Part Routing
12. Notes Functional
    1. Part Notes
    2. BOM Notes
    3. Routing Notes
    4. Customer Notes
    5. Vendor Notes
    6. Sales Order Notes
    7. Purchase Order Notes

Make sure that users can process:

1. Forecast Orders
2. Sales Orders
   1. Add Order
   2. Ship Order
   3. Print Sales Order
   4. Print Acknowledgement
   5. Print Packing Slip
   6. Post Order
   7. Print Invoice
3. Master Scheduled Orders
   1. Add, Change, Delete
4. Do an MRP Run
   1. Recalculate Low Level Code
   2. Regenerate Requirements
   3. Do an MRP Explosion
5. Planned Orders
   1. Approve for Purchase
      1. Purchase Requisition > PO
   2. Approve for Manufacturing
6. Process a Shop Order
7. Process a Subcontract BOM Method Order
8. Process a Subcontract Shop Method Order
9. Process a Purchase Order
10. Do all the Transactions in Inventory Control > Transaction Tabs
11. Do a Cost Roll up
12. Cost Sets in Costing
13. Process a PO Voucher and post the batch – Processed ok – no posting due to GL
14. Run the From To Charge Report and Post the GL
15. Post the Batches coming from MAX in Dynamics
16. Perform the usual duties in Dynamics required by Accounting Personnel and print all the usual reports.
    1. Checks
    2. Trial Balances AR,AP, other
    3. P&L
    4. Balance Sheets
    5. Other Custom Reports

Having done the above and verifying with each user of MAX that they can indeed do their usual duties I would be satisfied that we have a green light to “Go Live”. Also, please note that this does not need to take a long time. I just needs to get done.

Attachments:

Follow this document to make sure you implement the new features

**Preparing\_for\_Upgrade\_to\_Exact\_MAX 5.5.3\_R5.pdf**

Use this document if you’d like to create a Test Environment.

**Updating and using your MAX Test Environment.pdf**