

# axis diplomat 2018 Modules

# Stock Transaction Traceability

### **Overview**

Record and track stock items by serial number or batch number and manage Best Before dates and Warranty periods more easily.

# **Traceability Modes**

Any stock item can be set as a traceable item, using one of three traceability modes:

#### **Batch Traceability**

The Batch Traceability mode records one set of traceability details (see fig. 1 overleaf) for each stock receipt. Stock issues may, of course, be from a mixture of batches.

#### Serial Number Traceability

Serial Number Traceability (see fig. 2 overleaf) works in a similar manner to Batch Number Traceability, except that the details are recorded for each individual item, rather than each whole receipt. Serial Numbers are associated with individual items and so this mode cannot be used on stock items with decimal places on quantities (because issues are then not necessarily a number of individual items).

#### **Certificate of Conformity Traceability**

CoC Traceability is similar to Batch Traceability, in that the details recorded can relate to a quantity of a stock item, rather than an individual. Additional information is recorded relating to the suppliers or manufacturers Certificate of Conformity (see fig. 3. Overleaf).

## **Using Traceability Details**

When issuing a traceable item (such as releasing a sales invoice or using the Stock Issues function), the operator is presented with a list of the batch numbers or serial numbers of the items in stock, to choose the item(s) being issued. Traceability details may, optionally, be printed on invoices and delivery notes.

When issuing traceable items, the normal FIFO rules do not apply because the cost of the issue will be taken from the particular receipt relating to the batch or serial number being issued.

A powerful Stock Traceability Enquiry (see fig. 4) is provided, which allows traceability details to be interrogated. This allows you to find, for example, who received stock from a given batch, which serial numbers of a given item have been issued to a particular customer, or which supplier a given serial number came from.

The module also adds several reports to the Stock Reporting functions, allowing traceability history to be reported.

# **Enquiry Screens**

Traceability Details		
Date received	030501	
Quantity	10	
Batch reference		
Batch date	030501	
Date manufactured	030501	
Specification code	Γ	
Specification description		
Additional information		
Manufacturer's week num	ber 18	
Manufacture's year numb	er 01	

Fig 1 - Batch Traceability Details

Traceability Details		
Date received	030501	
Item number	1 of 10	
Serial number	355576	
Automatic serialisation?	Yes 💌	
Quantity to serialise	10	
Date manufactured	030501	
Specification code	Γ	
Specification description	[	_
Additional information	[	_
Manufacturer's week number	18	
Manufacturer's year number	01	

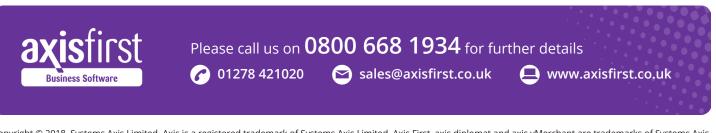
Fig 2 - Serial Number Traceability Details

eability Details - Receip	t Reference REF3	2×
raceability Details		
ate received	030501	
Juantity	10	
entificate number		
ale of certificate	030501	
ate manufactured	030501	
pecification code	Γ	
pecification description		_
dditional information		_
fanufacturer's week number	18	
(anufacturer's year number	01	

Fig 3 - Certificate of Conformity Details

	nguiry	
e Helb		
Traceability Details		
Search for	Stock Item	
Include items	Stock Item Receipt Reference Serial Number Batch Reference CoC Number	
Account Record Select	tion Customer Supplier Issue Reference	
Stock Record Selection	n Reference Search	
Search by	Reference Search	
Search by Beference search	Reference Search	
Search by Beference search Stock reference	Reference Search	

Fig 4 - Stock Traceability Details Enquiry



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