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

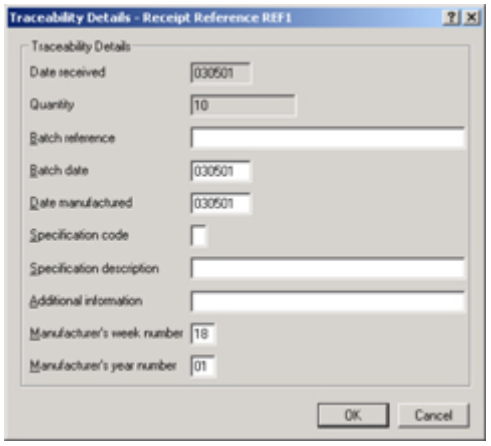

Fig 1 - Batch Traceability Details

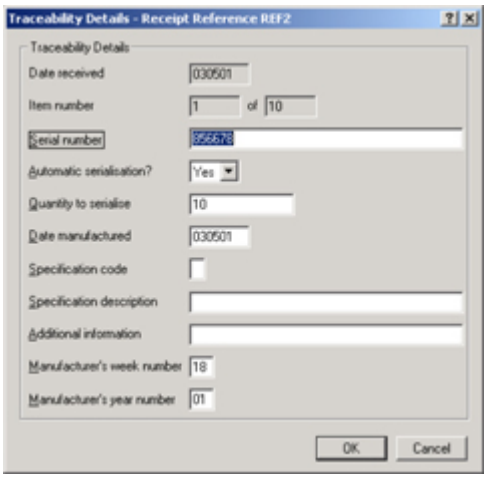

Fig 2 - Serial Number Traceability Details

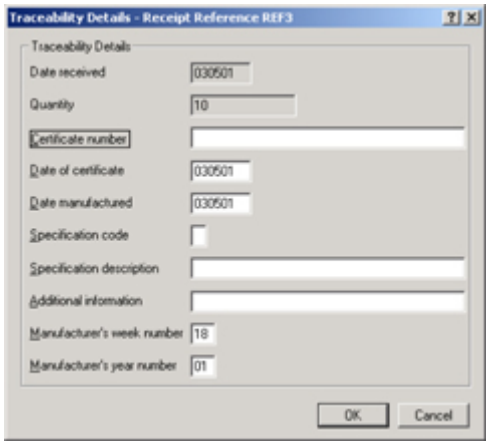

Fig 3 - Certificate of Conformity Details

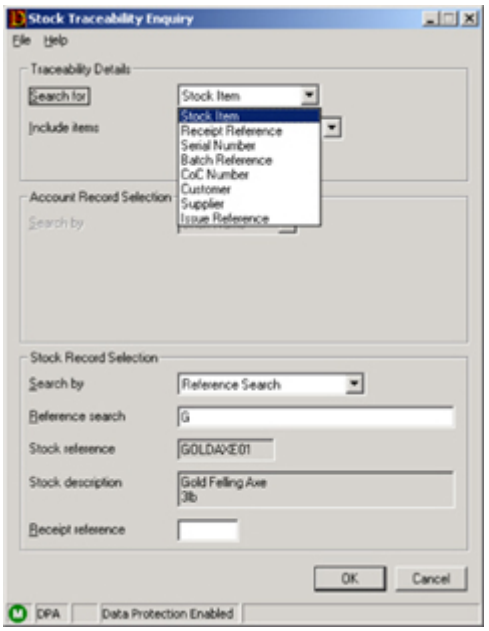

Fig 4 - Stock Traceability Details Enquiry

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