

Product Batches

Product batches can track inventory costs separately for the same product based on a batch reference. There are 3 key benefits to product batches. They are:

- to keep a special buy separate from regular stocked inventory;
- to prevent job specific buys from affecting inventory average cost; and,
- to track inventory lots.

Setup

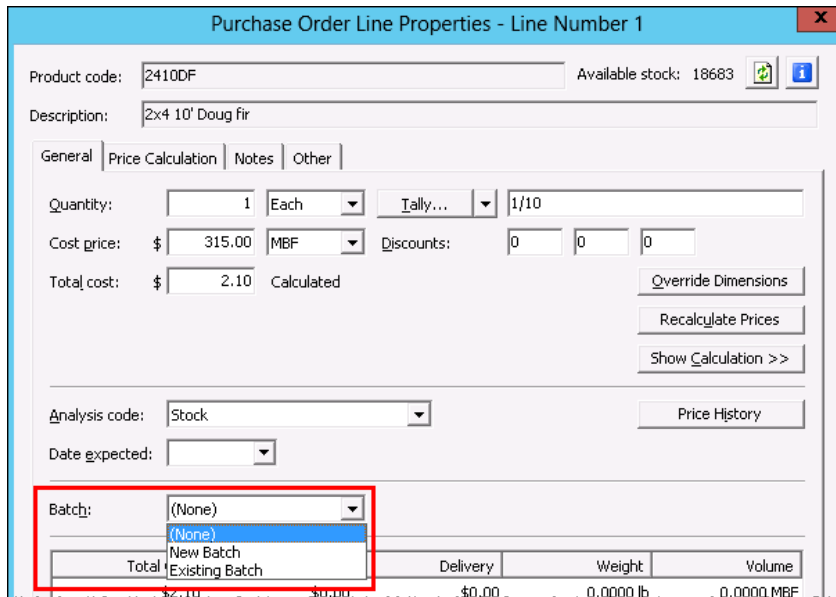
Product batches are branch and product specific and can maintain separate average costs. The 'Batch Type' column on the product properties branch stock options tab is where a specific product and branch can have either a Costed Batch or Lot Batch type specified.

Branch	Batch Type	Lead Time (Days)	Cover (Weeks)	Minif Le
(Defaults)	(None)	0	0	
Branch 444	(None)	0	0	
Cedar Rapids	Costed Batch	0	0	
Des Moines	Lot Batch	0	0	

Two new permissions are also available for controlling the ability to create and use costed batches. These permissions are found within the Operations group.

Purchasing

Once a product has been assigned a batch type it can then have a batch reference assigned during the entry of a purchase order and/or stock receipt. Once established through the purchasing process this same reference can be used on sales orders, credit notes, inventory adjustments, works orders, stock transfers, inventory counts and VMI transactions.



Purchase Order Line Properties - Line Number 1

Product code: 2410DF Available stock: 18683

Description: 2x4 10' Doug fir

General | Price Calculation | Notes | Other

Quantity: 1 Each Tally... 1/10

Cost price: \$ 315.00 MBF Discounts: 0 0 0

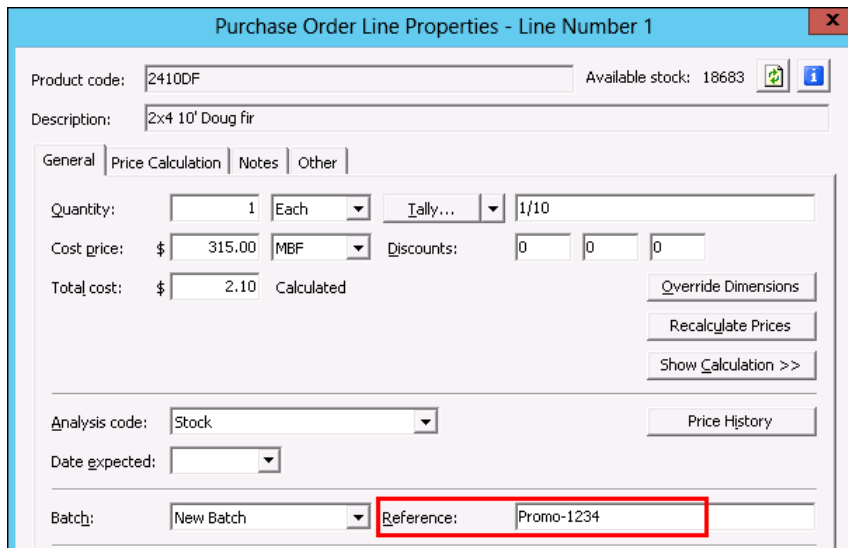
Total cost: \$ 2.10 Calculated

Analysis code: Stock

Date expected:

Batch: (None)

Total	Existing Batch	Delivery	Weight	Volume
\$2.10	\$0.00	\$0.00	0.0000 lb	0.0000 MBF



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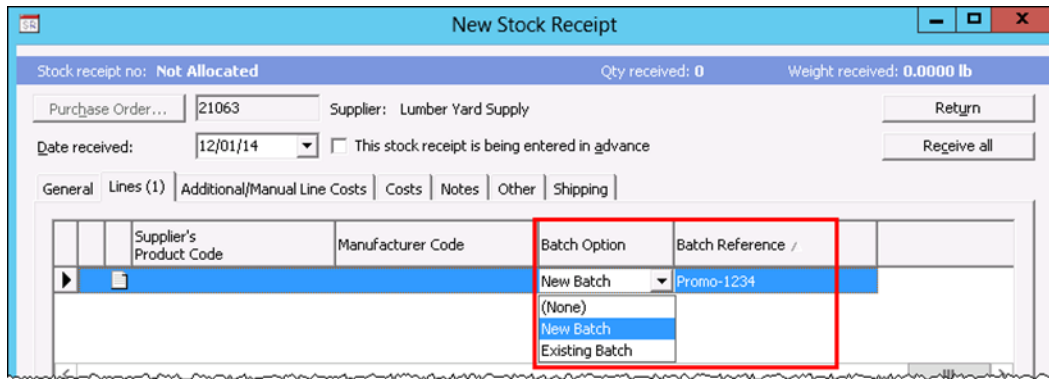
Total cost: \$ 2.10 Calculated

Analysis code: Stock

Date expected:

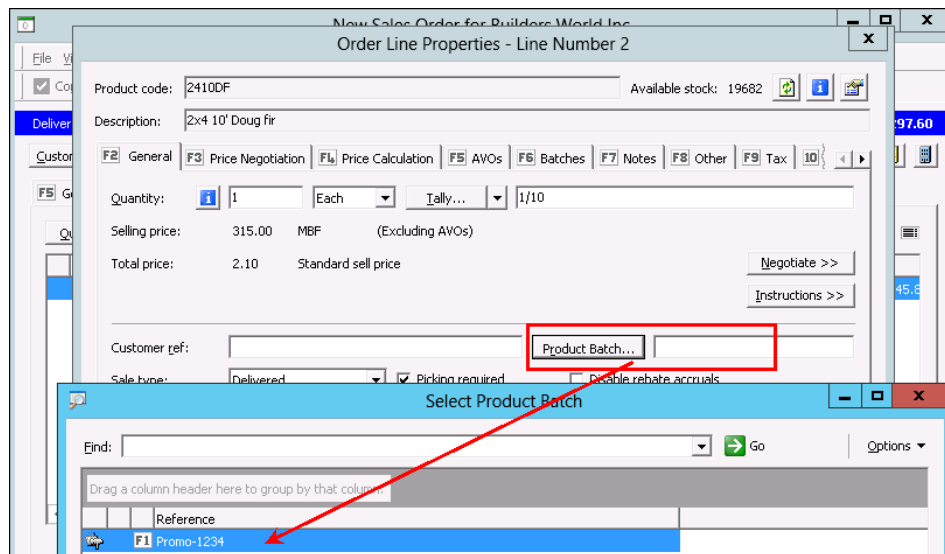
Batch: New Batch Reference: Promo-1234

Batch information is carried from the purchase order to the stock receipt. When not set on the purchase order it can still be set on the stock receipt. The same purchase order line can be received into multiple batches.

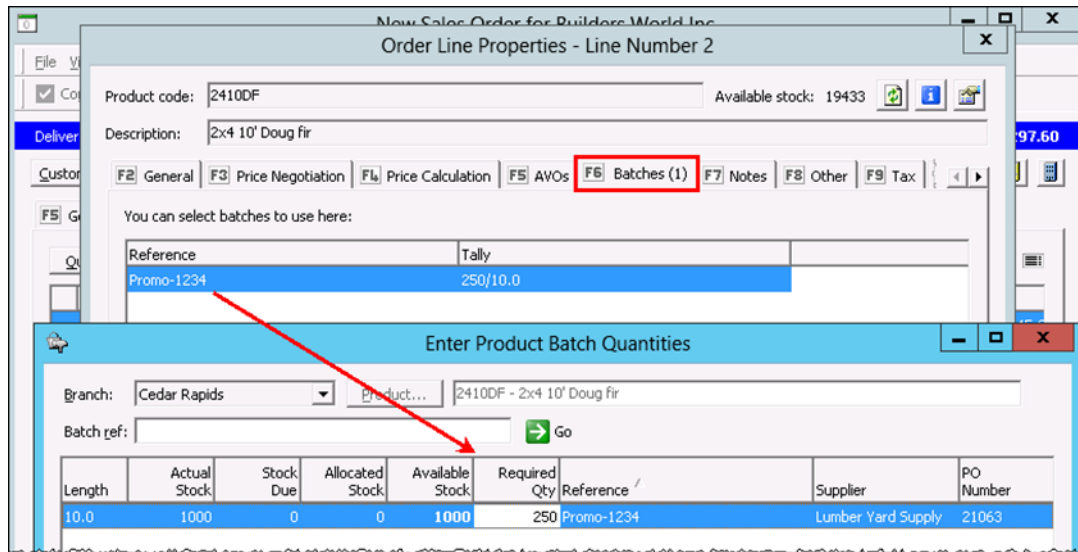


Selling

Within sales the batch reference can be entered or selected using the Product Batch Find. Product batches entered on quotes or call off orders flow through to the sales order. A batch reference can be entered even if a batch does not exist as long as the product selected for the current branch has been set up with a batch type of costed or lot.

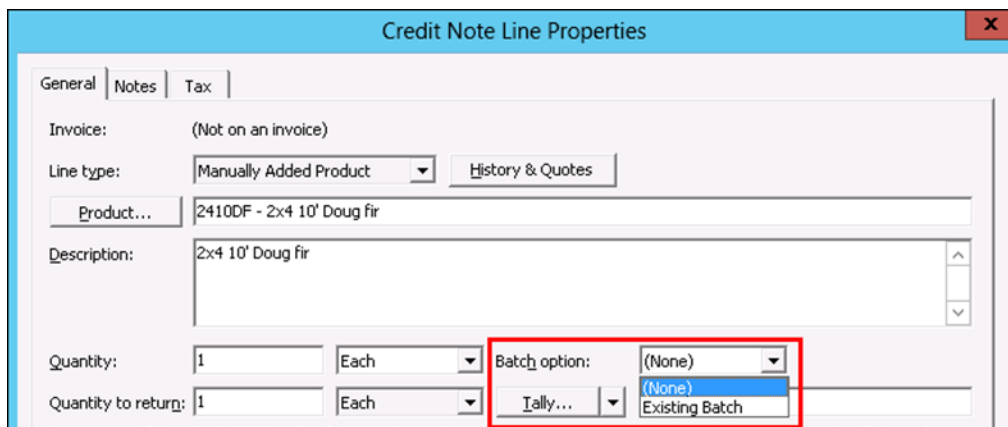


A new Batches tab can be used to enter products onto the sales order line. Multiple batches can be selected to allocate a quantity from each batch. It is however not possible to mix batches and inventory on a single line.



Batches can be entered or changed during picking however it is not possible to mix batches and inventory on a single line.

Stock on credit notes can be returned to inventory to an existing batch. It is not possible to return to a batch when the original sale was issued out of inventory (non-batch).



Inventory

Product batches can be selected when doing stock adjustments, average cost adjustments and works orders. On works orders the batches can be selected on the source material lines and can be created or selected on the finished goods lines. When a product is transferred between branches the product batch reference remains the same. Product is updated to regular stock when the branch receiving the transferred product does not support batches. Batch products can be counted and all batches are included and counted together with inventory.

VMI

VMI programs can be flagged to use batches. This allows a single product to be used in one branch as both VMI and non-VMI. The batch is generated using the batch reference entered during purchasing. Restocks of an existing VMI program can reuse the batch. Like regular VMI processing the supplier is paid only for the materials used from the batch.

Tallied Timber

Using product batches, it is possible for tagged packs to be individually costed. Each tagged pack is its own batch and the batch reference is generated based on the pack tag reference. For products that are set to 'Stock By Length' the length information is stored for the batch.

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