

Sage Evolution

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Sage Evolution Lot Tracking Module

Sage Evolution's Lot Tracking module will give you greater control of your inventory, helping you manage both the quality and sell-by dates of your stock.

Inventory management is an important discipline for all stock-based businesses. For those in the business of manufacturing, distributing and retailing perishable items however, it's an imperative. That's because perishable items are tagged with batch codes in addition to serial numbers, allowing companies who deal with this kind of stock to track items that have exceeded their sell-by or best-by dates. This prevents customers from buying them or, in the event of a problem with a product, for all items from that batch to be easily located and disposed of.

Beyond the perishables industry however, batch or 'lot' tracking has become an important measure taken by manufacturers in controlling the quality of their goods. In fact, many customers use both serial number and lot numbers for tracking purposes, since it allows for a higher level of accuracy.

The screen below illustrates how inventory items can be set-up to have expiry dates on lot items.



Lot tracking in practice

Once an inventory item has been assigned a lot tracking number, all its movements within the system must use the same lot number - a lot number is required when an item is manufactured or purchased, when it is moved between warehouses, when it is sold and when the product is returned.

The add-on module is also extremely customisable, allowing customers to specify per inventory item whether to use expiry dates per lot. If expiry dates are used, the sale of expired items is automatically prevented.

Customers can also create different lot statuses, such as approved or non-approved, and ensure that each lot goes through one or more status change before it can be sold or purchased.

This functionality enables the customer to inspect and approve batches of medicines or other perishables to ensure that their expiry dates are correct, prior to selling the items.

How it works

- Customers specify what each status code means, i.e. which codes indicate that a lot can be purchased and conversely, which indicate that a lot cannot be sold.
- Lots with an 'approved' status (in the case of quality control) can, for example, be enabled for purchase, but disabled for sales.
- Lots that are faulty or expired can be disabled for both purchasing and sales.
- If status codes aren't desired for a particular lot, customers can configure a single code that enables the lot for both purchases and sales.
- If customers specify the status code for each lot tracking item they initially have, the lot tracking 'Status Transfer' function can be used to change the status of each lot.

The screen below illustrates the expiry date and statuses of each lot number.

The screenshot shows the 'Status Transfer' application window. The 'Lot Number' section displays the following information:

Inventory Item	LOT1 (Lot Item One) (Lot Item One)
Lot Number	LOT1-000001 (15/05/2008) (100) (0)
Status	Approved
Expiry Date	15/05/2008

The 'Transfer Options' section includes the following fields and options:

- Change Status
- Change Expiry Date
- Transfer Date: 11/08/2008
- New Status: [Dropdown menu]
- Change Expiry Date: [Dropdown menu]
- Reference: [List box containing Lot Status, Expired, Not Approved, Rejected]
- New Expiry Date: [Field]

In addition to this functionality, the system also has a powerful reporting engine that allows for a list of statuses to be compiled either per lot number or by listing the transactions that have taken place for each lot.

The enquiry screen below allows customers to seek out the history of a specific lot tracking item.

Inventory Code	Lot Number	Date	Code	Reference 1	Reference 2	Account	Qty In	Qty Out
LOT1	LOT1-00000002	23/07/2008	GRVS	INV7658	GRV0096	Specialised Cars	5.00	
LOT1	LOT1-00000002	29/08/2008	IS	INV2616		AST Group		15.00