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DS0289

Lot Number U of M Entry



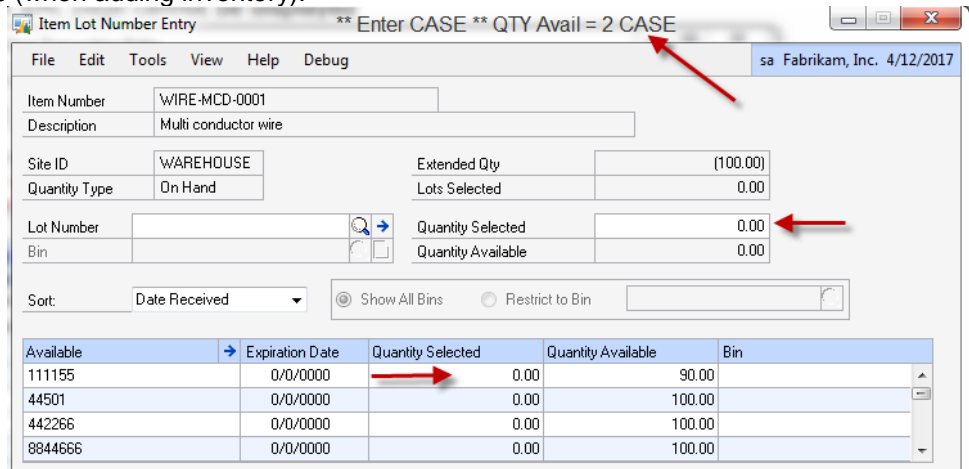
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Problem Definition

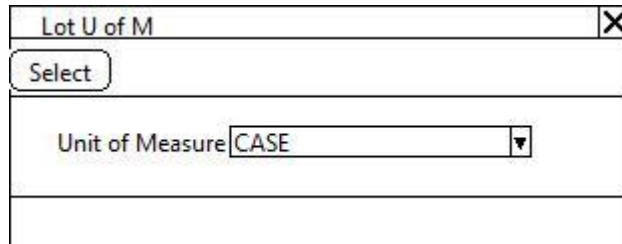
<i>Problem Definition</i>	CCDA
<p>ACMECO uses lot numbered inventory in Dynamics GP. While the main transaction windows in GP can use any unit of measure from the Item's Unit of Measure Schedule, the Lot Number selection windows are all in the base unit of measure. Most of ACME's transactions are conducted using a unit other than base, so users need to constantly perform conversions from the base when selecting lots.</p> <p>A solution is desired that allows the user to select/enter lot quantities in the transaction unit of measure.</p> <p>The following windows should be addressed:</p> <ul style="list-style-type: none"> • PO Receipts • Sales Transaction Entry • Inventory Adjustments • Stock Count Entry <p>ACMECO uses a 3rd party catch weight module from Trinity which provides alternate windows for Sales Lot Number Entry and Stock Count Lot Number Entry.</p> <p>These requirements apply only to a certain group of items that will be identified by a 1 in the Warranty Days field (Item Maintenance >> Options).</p>	

Solution Overview

Solution Overview	CCDA
<p>Lot Selection windows in GP all function in a similar manner. Depending on whether or not the transaction is adding or removing inventory from the system, there may be a list of “Available” lots to choose from (when removing inventory), or just lot number and quantity fields (when adding inventory).</p>  <p>The general approach will be to:</p> <ol style="list-style-type: none"> (1) Display the transaction Unit of Measure in the Title Bar of the window. As shown above, the Inventory Adjustment was entered using CASE, so the Lot Selection window defaults to CASE. An Additional menu option will allow the user to select a different U of M if desired. (2) Depending on the transaction, the title bar will show other quantities converted to the Lot U of M. For example, total quantity selected, and quantity available of the currently selected Lot Number. (3) When the user enters a quantity they will do so in CASE (the Lot U of M). The 	

system will automatically convert it to the quantity in base. For example, if the user entered 2 and there were 10 in a case, the quantity field would immediately change to 20.

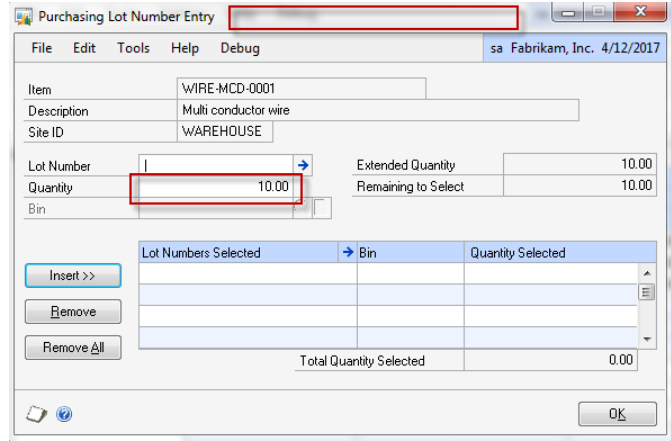
To select or change a Lot Unit of Measure from any of the affected windows, the user will click on Additional >> Select Lot U of M.



The Lot U of M window will show available Units of Measure in a drop-down list. All Units of Measure in the U of M Schedule will be displayed. For Purchasing or Sales it does not matter if the selected U of M is not defined as a Purchasing or Sales Unit of Measure because the quantity will be converted to base anyway.

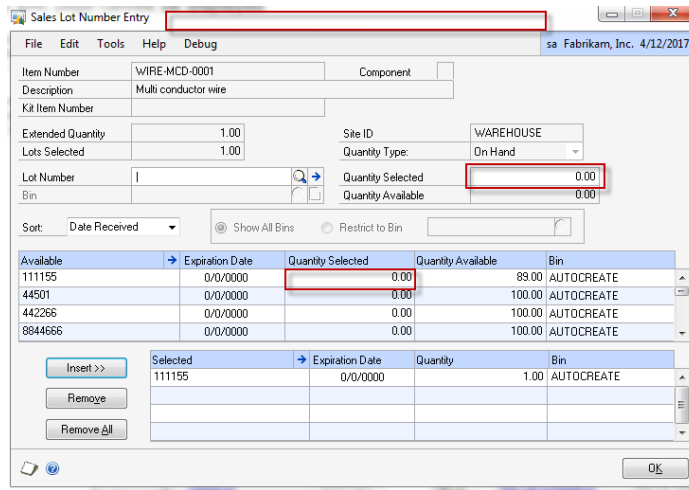
The modifications will only be active if the Item Number is (1) Lot Controlled, and (2) has Warranty Days <> 1 (not equal to 1). For these items the modifications will be activated. Otherwise the modifications will not be active and the windows will behave as they normally do in GP.

Design Features

<i>Purchasing Lot Number Entry</i>	CCDA
 <p>This window will default to the U of M used on the PO Receipt. The Title Bar will show the current U of M, and the Quantity Remaining converted to the transaction U of M.</p> <p>Additional >> Select Lot U of M to pick a different Unit of Measure.</p>	

Sales Lot Number Entry

CCDA



Available	Expiration Date	Quantity Selected	Quantity Available	Bin
111155	0/0/0000	0.00	89.00	AUTOCREATE
44501	0/0/0000	0.00	100.00	AUTOCREATE
442266	0/0/0000	0.00	100.00	AUTOCREATE
8844666	0/0/0000	0.00	100.00	AUTOCREATE

Selected	Expiration Date	Quantity	Bin
111155	0/0/0000	1.00	AUTOCREATE

For Orders and Invoices the “Available Lots” scrolling window is populated. For returns, only the Lot Number and Quantity Selected fields in the top section are available. The Lot U of M will default to the transaction U of M.

For Orders and Invoices the title bar will display the Lot U of M, total quantity selected and quantity available in the Lot U of M. The Available quantity displays only when an existing Lot is entered, or the focus is placed on a line in the scrolling window. For example:

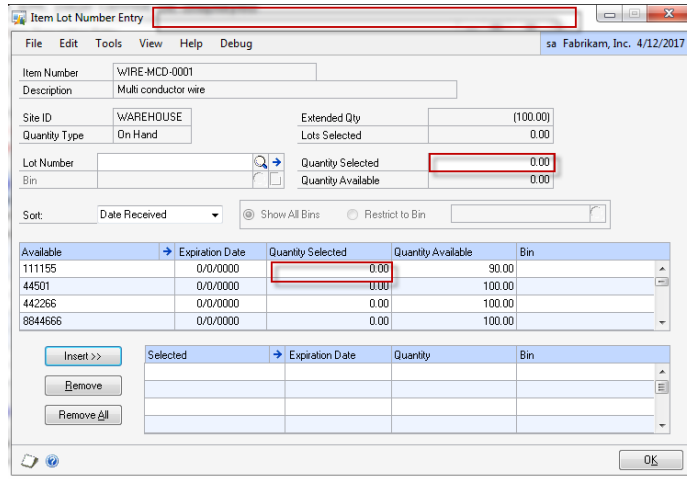
Unit: CASE ** Selected: 2 ** Available: 5

For Returns the title bar will display only the Lot U of M and total quantity selected.

Additional >> Select Lot U of M to pick a different Unit of Measure.

Item Lot Number Entry

CCDA



Available	Expiration Date	Quantity Selected	Quantity Available	Bin
111155	0/0/0000	0.00	90.00	
44501	0/0/0000	0.00	100.00	
442266	0/0/0000	0.00	100.00	
8844666	0/0/0000	0.00	100.00	

For decrease transactions the “Available Lots” scrolling window is populated. For increase transactions, only the Lot Number and Quantity Selected fields in the top section are available. The Lot U of M will default to the transaction U of M.

For decrease transactions the title bar will display the Lot U of M, total quantity selected and quantity available in the Lot U of M. The Available quantity displays only when an existing Lot is entered, or the focus is placed on a line in the scrolling window. For example, the title bar could show:

Unit: CASE ** Selected: 2 ** Available: 5

For increase transactions the title bar will display only the Lot U of M and total quantity selected.

Additional >> Select Lot U of M to pick a different Unit of Measure.

Stock Count Lot Number Entry

CCDA

Lot Number	Captured	On Hand	Allocated	Counted	Variance	Verified
1001155	100.00	100.00	0.00	0.00	0.00	<input type="checkbox"/>
1	1,000.00	1,000.00	0.00	0.00	0.00	<input type="checkbox"/>
111155	100.00	100.00	10.00	0.00	0.00	<input type="checkbox"/>
442266	100.00	100.00	0.00	0.00	0.00	<input type="checkbox"/>
44501	100.00	100.00	0.00	0.00	0.00	<input type="checkbox"/>
8844666	100.00	100.00	0.00	0.00	0.00	<input type="checkbox"/>
A1	1.00	1.00	0.00	0.00	0.00	<input type="checkbox"/>
ADJ0111	1.00	1.00	0.00	0.00	0.00	<input type="checkbox"/>
LOT B	1,000.00	1,000.00	0.00	0.00	0.00	<input type="checkbox"/>
LOT1	1,000.00	1,000.00	0.00	0.00	0.00	<input type="checkbox"/>

Lot Number Counted Qty: 0.00 Lot Number Variance: 0.00
 Item Counted Qty: 100.00 Item Variance: (3,404.00)

The Stock Count defaults to the base unit of measure. When the Stock Count Lot Number Entry window opens it will default to the “highest” Unit of Measure (the unit that converts into the largest quantity of the base unit). The user will be able to select a different Lot U of M by going to Additional >> Select Lot U of M.

The title bar will show the Lot U of M, and the Total Counted Qty and Variance Qty in the Lot U of M. For example:

Unit: CASE ** Counted: 2 ** Variance: (5)

