

AccountMate's Lot Control module adds the power of a complete lot or batch control system to your Inventory Control. It gives you the ability to track units of lot controlled items from purchase or production through inventory and sale and allows you to keep a record of each lot controlled unit's expiration date. The Lot Control module integrates with AccountMate's Accounts Receivable, Inventory Control, Kitting, and Sales Order modules.

AccountMate Enterprise 2023 Lot Control Module

Efficiently Manage Critical Inventory

Instant access to the status, effectivity date, and disposition of critical or perishable inventory items. This allows units of a lot-controlled item to be tracked, used or sold well before their indicated perishable dates. Customers to whom such items were sold can be promptly identified and notified of any problems that may arise with the items they purchased, or about plans for product upgrades.

Easy to Assign Lot Numbers

You can assign lot numbers to the units of an item stored in a specific warehouse, received on a particular purchase order, or built as a customized kit item for a sales order. Lot numbers can be assigned to standard kits as they are built. Multiple lot numbers can also be simultaneously assigned to a batch of lot-controlled item units.

The screenshot shows a software window titled "Assign Lot # by Item" with a "Selection Criteria" tab. The window includes a "Review Lot #" field and a "Selection Criteria" section. The "Selection Criteria" section contains several fields: "Warehouse" (MAIN), "Bin" (A1), "Barcode" (empty), "Main Warehouse" (MAIN), "Item #", "Specification" (Row A Section 1), "Lot Controlled Item" (LOT CONTROL ITEM), and "Stock U of M" (EACH). Below these fields are "Last Assigned Lot #", "Minimum Days To Sell" (0), "Minimum Days To Use" (0), "Default Lot #" (PL1001), and "Default Expiration Date" (12/31/2022). There are "Save" and "Cancel" buttons at the top, and an "OK" button at the bottom.

Assign Lot # by Item Function – Selection Criteria Page

Easily Identify Lot Controlled Items

Lot controlled items are clearly identified on the inventory screen and on the transaction lines of sales orders, purchase orders, and invoice screens, and during receipt of goods. You can easily spot inventory items that are lot-controlled in item lookup or transaction screens since they are specifically labelled as special items.

Assign Serial Numbers to Lot Controlled Items

Lot controlled items can also be serialized. Assigning a serial number to a lot-controlled item permits the tracking of a specific cost for the item. It also allows you to select specific lot-controlled items by its serial number during item selection in transactions.

Monitor Expiration Dates

Generate a report or view on screen the expiration date of each lot. You can quickly check for on-hand quantities of items belonging to a particular batch that are set to expire on a certain date so that you can take them out of inventory as they expire. This also helps verify the expiration dates of available lot-controlled units when processing customer orders.

Print Lot Numbers on Reports

Lot numbers can be printed on Shipment Reports, Packing Slips, Invoices, and Inventory Lot Recall Reports. This allows you to quickly verify when and to whom you sold units from a particular lot. This can be very helpful to both you and your customers in case of a product recall, modification, or upgrade.

View or Print Inventory Lot Recall Reports

You can review the transactions that involve particular system lot numbers or vendor lot numbers using the Inventory Lot Recall Report. This report helps you determine whether lot-controlled items that are being recalled have been sold to customers.

Integration with Other Modules

- Integration with Inventory Control expands the core features of the Inventory Adjustment, Warehouse and Bin Transfers,

Internal Stock Issuance and Physical Count functions to allow you to select lot numbers when dealing with lot-controlled items.

- Integration with Sales Order and Accounts Receivable modules enhances the core functionalities of these modules to support the selection of lot numbers when shipping orders and creating invoices.
- Integration with the Purchase Order module allows you to record the vendor's lot number and assign your own lot numbers upon receiving each order.
- When integrated with the Kitting module, lot numbers can be assigned to a batch of kit items. You can also track the lot numbers of any lot-controlled kit components.

AccountMate Software Corporation

1445 Technology Lane | Suite A5 | Petaluma, California 94954 | USA
800-877-8896 | 707-774-7500 | www.accountmate.com