

# YAVEON

## ProBatch 365 Lot Management

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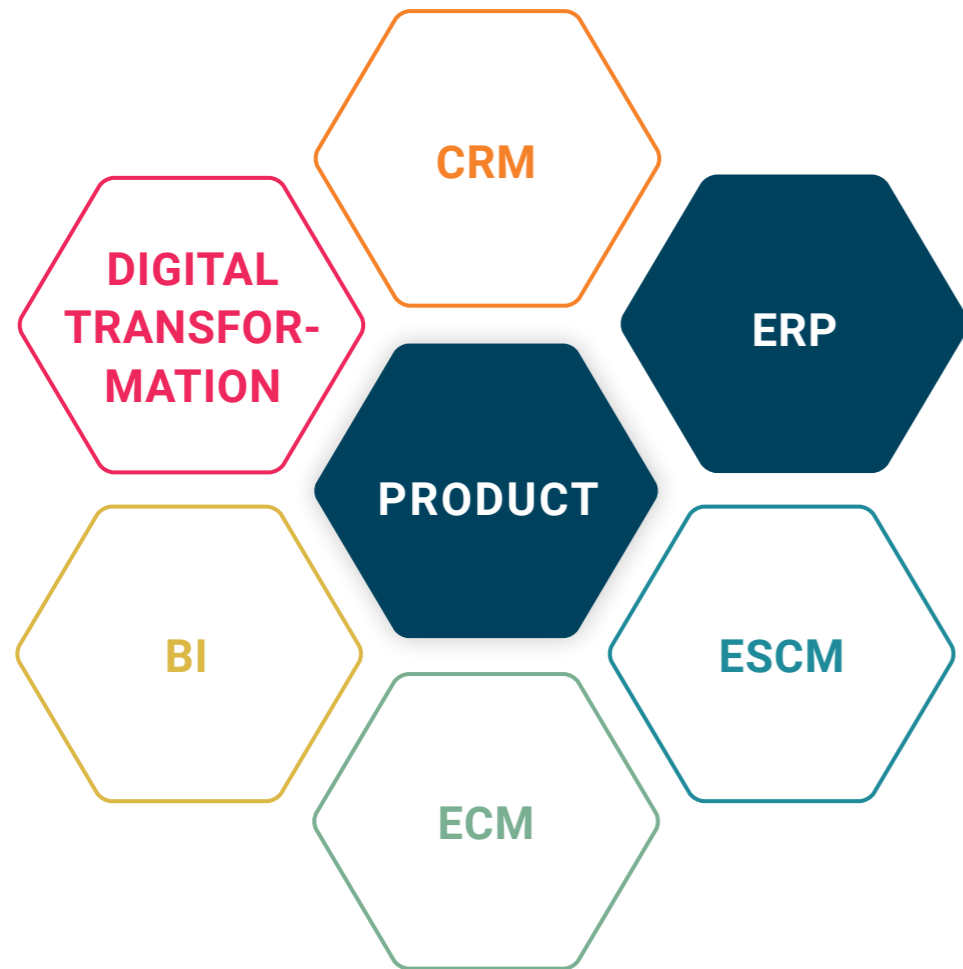
[WWW.YAVEON.COM](http://WWW.YAVEON.COM)



Microsoft  
Partner



## EVERYTHING AT A GLANCE



### BASIS

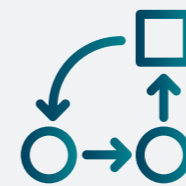
Microsoft Dynamics 365 Business Central

### COMPANY SIZE

Small and medium-sized companies

### INDUSTRIES

Chemicals, pharmaceuticals, biotechnology, cosmetics, food, medical technology



### AUTOMATION

Automated processes to reduce workload and errors while saving time.



### SAFETY

Status display of batches at a glance with traffic light colored fields for increased safety.



### OVERVIEW

From raw material to end product and vice versa: Batch histories at a glance for a better overview and the ability to react quickly in an emergency.

# HOW DOES THIS WORK EXACTLY? THE FEATURES

## Manage additional batch attributes

You can effortlessly maintain data such as the quality status, an external batch number, or delivery date. It is also possible to set up the initial quality status of a new batch on an item-by-item basis.

## Log change of batch attributes

Changing batch attributes made easy - via a document created for a specific batch of an item. The current values of the batch attributes are saved in the document, and new values are recorded.

## Set up rules for changing batch attributes

You define which users can change individual batch attributes for items or item groups.

## Split and merge

With the batch split, you can post the division of a batch stock into several partial batches. Batch merging combines stocks of different batches into a single batch.

## Keep an eye on your batches

All postings for items with full lot tracking are traced in the system. You can trace either starting from inbound to corresponding outbound postings or vice versa. Tracing resolves consumption and output postings for production orders over multiple levels.

## Take advantage of the automatic batch split

Whether it's a purchase delivery, production addition, or sales return, easily set up an automatic batch split. Suppose the batch split is activated and the batch already exists in the inventory. In that case, a new split batch is automatically formed if this is activated for the current quality status of this batch.

## Create product labels for your batches

You can easily print labels with the batch number, expiration date, and external batch number. You can also re-print existing labels; this process will be tracked so you won't lose sight of the number of labels.

**PB365 Item Tracing**

Process Reports Actions Related Fewer options

**General**

Item Filter: 1000082 Show Warehouse Movements:

Variant Filter: " Trace Method: Usage -> Origin

Lot No. Filter: LOT000403 Level of Detail: High

Ext. Lot No. Filter: Max. Tracing Level:

Serial No. Filter: Explode Prod. Order Structure only once:

Show Components: All

**Lines**

Description	Serial No.	Lot No.	Item No.	Item Descr.	Location Code	Bin Code	Quantity	Remaining Quantity	Unit of Measure	Create
Sales Shipment Header SD100034		LOT000403	1000082	YAVI Er...	MÜNCHEN	WA-01	-2	0	KG	YAVEO
Status: QC->FREIGEgeben, First Release Date: ->19.05.21...		LOT000403	1000082	YAVI Er...	MÜNCHEN	WA-01	2	0	KG	YAVEO
Pick REGK000020		LOT000403	1000082	YAVI Er...	MÜNCHEN	WA-01	-2	0	KG	YAVEO
Put-away REGE000054		LOT000403	1000082	YAVI Er...	MÜNCHEN	RW-03-03-02	-1.000	0	KG	YAVEO
Purch. Rpt. Header 100121		LOT000403	1000082	YAVI Er...	MÜNCHEN	WE-01	1.000	0	KG	YAVEO
Status: QC->FREIGEgeben, First Release Date: ->19.05.21, L...		LOT000403	1000082	YAVI Er...	MÜNCHEN	RW-03-03-02	998	998	KG	YAVEO
Put-away REGE000054		LOT000403	1000082	YAVI Er...	MÜNCHEN	RW-03-03-02	-1.000	0	KG	YAVEO
Purch. Rpt. Header 100121		LOT000403	1000082	YAVI Er...	MÜNCHEN	WE-01	1.000	0	KG	YAVEO

**LOT NO. MODIFICATION**

LNM000005

Get Lines... Post... More options

**General**

No.: LNM000005 Posting Date: 30.03.2020

**Lines** Manage

Item No.	Description	Lot No.	New Lot No.	Status	Location Code	Inventory	Qty. to Handle	Unit of Measure	Date of Entry	Expiration Date
2000	Ascorbic Acid	LOT0014	LOT0014/003	RELEASED	BLUE	120	80	KG	10.10.2019	27.03.2021
2000	Ascorbic Acid	LOT0015		BLOCKED	BLUE	150	150	KG	07.01.2020	18.03.2020
→ 2000	Ascorbic Acid	LOT0016	LOT0015	QUARANTINE	BLUE	180	120	KG	09.03.2020	03.07.2021
2000	Ascorbic Acid	LOT0017		QUARANTINE	BLUE	300	300	KG	10.01.2020	13.11.2020

**LOT NO. INFO MODIFICATION**

LIM000024

Post...

**General**

No.: LIM000024 Lot No.: LOT0015

Item No.: 2000 Posting Date: 26.03.2020

Variant Code:

**Data**

Status: BLOCKED New Status: RELEASED

Date of Entry: 07.01.2020 New Date of Entry: 07.01.2020

External Lot Number: New External Lot No.:

Expiration Date: 18.03.2020 New Expiration Date: 31.05.2020

Maximum No. of Expi...: New Maximum No. o...:

Maximum Expiration ...: New Maximum Expir...:

No. of Expiration Dat...: 1 New No. of Expiratio...:

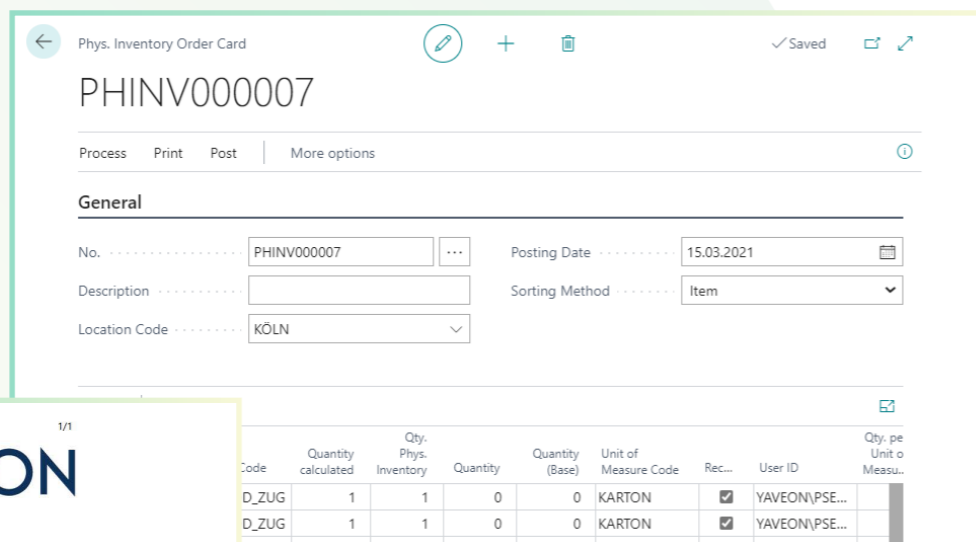
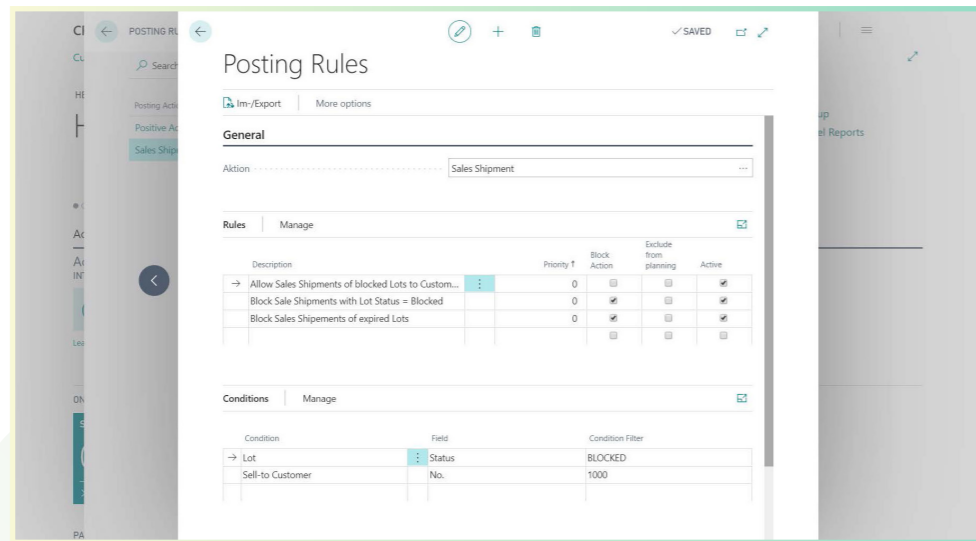
First Release Date: New First Release Date:

Last Release Date: New Last Release Date:

Container Type Code: New Container Type ...:

Base Lot No.: LOT0015 New Base Lot No.: LOT0015

## HOW DOES THIS WORK EXACTLY? THE FEATURES



**Item No.** 2000  
**Description** Ascorbic Acid  
**Lot No.** LOT0014  
**Date of Entry** 10.10.19  
**Expiration Date** 27.03.21



LOTMGT

### Set posting rules

Use these rules to restrict batch usability for sales deliveries and picking and define restrictions for storage regarding batch attributes. For example, you can prevent blocked or expired batches from being picked, delivered to a customer, or used in a production order. You can also define whether batches can be used as supply and specify posting rules that dictate where batches can be stored.

### Pick individually

Set up the picking method individually for each item. Choose between FEFO (First Expired First Out) and FIFO (First In First Out).

### Manage batch features

Apply specific feature values to a batch.

### Import your stock

To get the system up and running, simply import the inventory from a text file and post it.

### Ensure batch purity

Specify that only one batch may be used - both for specific sales deliveries and in the production order for a component.

### Create and edit inventory documents

Once an inventory document has been created, it can be used for all storage locations. You can also print a count list to be used for taking inventory. Enter the count results in the inventory document and print out an inventory difference list. By posting the inventory documents, you update the inventory data and create a history for the performed inventories.

### Appreciate the inventory overview

An inventory summary shows you an overview of current warehouse stock levels. So simple - and sorted by article, batch, storage location, and storage bin. In the inventory overview, you can directly post an inventory correction for a specific item. The lot management app extends the inventory summary through additional batch information.

### Select batch numbers - fully automatic

Do you want batch numbers to be proposed automatically, taking into account the picking method for sales orders, warehouse shipments, and components of production orders? Just set up rules for this.

# THE YAVEON PROBATCH 365 BASE APP

That all sounds excellent.

But wasn't there something about a surprise?

That's right, the **YAVEON Base app:**

It is more than a base. It is your foundation.

## Set up traffic light rules for tables

Red, yellow, green - we all know the traffic light principle. In the Base app, the colors make your life easier by acting as a visual reinforcement.

Define traffic light rules that change the colors based on values. For example, you can specify that fully delivered sales orders are indicated in green, while undelivered orders are indicated in red. Select the rules in the list view to highlight records.

You can set up the traffic light rules for the following tables:

- Items
- Vendors
- Customers
- Inventory Summary
- Purchase Lines
- Sales Lines

## Set up extended texts

Whether for master data or purchase and sales documents: Define extended texts for accounts payable, customers, G/L accounts, items, and resources. You want an automatic transfer to purchase and sales documents? No problem. Discover even more benefits by using extended texts in other YAVEON apps, for example, Research and Development, Warehouse Management, Sales & Purchase, and Quality Assurance.

No. 1	Description	Target Value	Unit of Measure Code	Data Type	Feature Type	Calcu... Feature	Calculation Formula
DETEX	detex		GR/10000M	Decimal	MA001		
F000001	Labeling	OK		Option	MA017		
F000002	Packaging	OK		Option	MA017		
F000003	Certificate	ATTACHED		Option	MA017		
F000004	Shipping Note	ATTACHED		Option	MA017		
F000005	Content of active ingre...		%	Decimal	MA002		
F000006	PH-Value	+7.0		Decimal	MA015		
F000007	Salt Content	4.00	%	Decimal	MA003		
F000008	Methanol		%	Decimal	MA015		
F000009	Optical rotation	0.0		Decimal	MA002		
F000010	Energy kj		KJ	Decimal	MA014		F000011+
F000011	Fat		GR	Decimal	MA009		
F000012	Sugar		GR	Decimal	MA010		
F000013	Ethanol		GR	Decimal	MA015		
F000014	Colour			Option	MA016		
F000015	API YAVIPROFEN		MG	Decimal	MA002		
F000016	Air pressure measur...		BAR	Decimal	MA020		
F000017	Zero Setting		GR	Decimal	MA020		
F000018	10g		GR	Decimal	MA020		
F000019	100g		GR	Decimal	MA020		

## Set up master data features

Assign features with a specific value to an item. You can also set up features whose value is calculated via a formula based on the values of other features.

Do you want to search for items with specific features? Just use the feature search. You can filter an item list so that only the items that match the criterion are displayed.

For even more benefits, combine the function with other YAVEON apps, for example, Quality Assurance and Manufacturing.

ProBatch 365 Base Corporate Design Documents Setup

Actions

**General**

Default Language: ENG  
 No copy Data run:   
 Default Date Format: 304  
 Line No divisor for POS:   
 Example for default d...: 19. May 2021  
 Proforma Invoice No.: Order No

**Report Print Details**

Print Logo:   
 Logo alignment in do...: Right  
 Print Return Address:   
 Print Footer:   
 Footer height - max...: 0  
 Doc. No. to Documen...:   
 Print Page Transfer S...:   
 Remove Empty Lines ...:   
 Show Labels without ...:   
 Show Lines with Zero...:

Print Blanket Sales Or...:   
 Length of Description: 0  
 Print Description 2:   
 Print Assembly Comp...:   
 Print Tracking Inform...:   
 PB365 Extended Texts:   
 INSERT EMPTY LINE AFTER LINE TYPE  
 Standard texts (Attac...:   
 Empty/Comment:   
 Item:



# THE YAVEON PROBATCH 365 BASE APP

## Set up a corporate design for your documents

Choose the layout that suits your company best and use it for diverse purchase, sales, and stock transfer documents.

Do you need the edited document in another language? No problem. Simply choose from the languages assigned to the labels for fields and columns and add document and field names. With one click, the finished document is ready.

To add information, choose which columns and fields to print on the document.

If you don't like the order of the columns, just change them according to your preference.

For even more benefits, extend the function for other YAVEON apps, for example, Trade, Hazardous Substances Management, Warehouse Management, Manufacturing, and Lot Management.

## Get an overview with the inventory summary

With the Inventory Summary, you always have an overview of the current inventory - sorted by item, batch, location, and storage space.

Would you like an up-to-date status report of your inventory? You've got it - because all of the information about your inventory is in one place and is automatically updated with every posting. It is your information center for warehouse managers, clerks, and production planners.

For even more benefits, add columns for other YAVEON apps, for example, Lot Management, Warehouse Management, Manufacturing, and Hazardous Substances Management.

## Extend the authorization management of Microsoft Dynamics 365 Business Central

Do you want to combine permission sets in the system and even be able to exclude certain rights? With Permission Set Management, this is possible.

Traf. Light	Item No.	Item Description	Lot No.	Serial No.	Location Code	Zone Code	Bin Code
●	E1200004	API YAVIPROFEN	LOT000081		BERLIN		
●	E1200004	API YAVIPROFEN	LOT000103		MUNICH	RECEIVE	REC-01
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02--
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02--
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02--
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02--
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02--
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02--
●	E1200005	Instruction Leaflet	LOT000018		MUNICH	RM	RM-02-02--
●	E1200005	Instruction Leaflet	LOT000054		BERLIN		
●	E1200005	Instruction Leaflet	LOT000096		MUNICH	RECEIVE	REC-01
●	E1300000	YAVINIGHT 50ml	2020703		MUNICH	SHELF	SH-01-01-0-
●	E1300000	YAVINIGHT 50ml	LOT-0069		MUNICH	PICK	KO-02-08-0
●	E1300000	YAVINIGHT 50ml	LOT-0072		UTRECHT		
●	E1300000	YAVINIGHT 50ml	LOT-0073		BERLIN		
●	E1300000	YAVINIGHT 50ml	LOT-0074		BERLIN		
●	E1300001	YAVI Bears	LOT000021		MUNICH	PICK	KO-02-08-0
●	E1300001	YAVI Bears	LOT000028		UTRECHT		

Role ID ↑	Name
BASE_ACCESS_TRAINING	Ergänzung zu SuperData
PB365 LM QP	PB Qualified Person
PB365 LM QS	PB Quality Supervisor
→ SAL-REP	Sales Representative
YAV-SUPER-DATA	YAVEON Super Data

Assigned Role ID ↑	Restrict Permissions	Scope ↑
D365 BASIC	<input type="checkbox"/>	System
D365 SALES DOC. EDIT	<input type="checkbox"/>	System
D365 SALES DOC. POST	<input type="checkbox"/>	System
RM-CONT	<input type="checkbox"/>	System
→ D365 VENDOR. EDIT	<input checked="" type="checkbox"/>	System

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