



ProcessForce User's Guide

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How to Guide – ProcessForce Item Details

The Item Details form is used to define the product master data associated with an item. ProcessForce provides a possibility to set an extended and diverse product definition. Item details make a number of item-associated activities easier, e.g. creating ingredient and allergen declaration, tracing batches, attaching files.

Item Details record is being created automatically when creating Item Master Data. If an Item Master Data was created before ProcessForce installation, restore procedure must be performed to obtain Item Details to the Item Master Data. You can check how to do this [here](#).

On this page

- [Introduction](#)
- [Revisions](#)
 - [Is MRP Default](#)
 - [Is Costing Default](#)
- [Batch Details](#)
- [Properties](#)
- [Classifications](#)
- [Phrases](#)
- [Origins](#)
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- [Texts](#)
- [Attachments](#)

Related pages

- [Item Master Data Setup](#)
- [Batch Template, Serial Template Definition](#)
- [Properties](#)
- [Item Classifications](#)
- [Phrases](#)
- [Item Groups](#)
- [Item Texts](#)
- [MSDS, Labels and Documentation](#)
- [Substitute Items](#)
- [Yield Master Data](#)
- [Country of Origin](#)

Path

Stock Management > Item Details

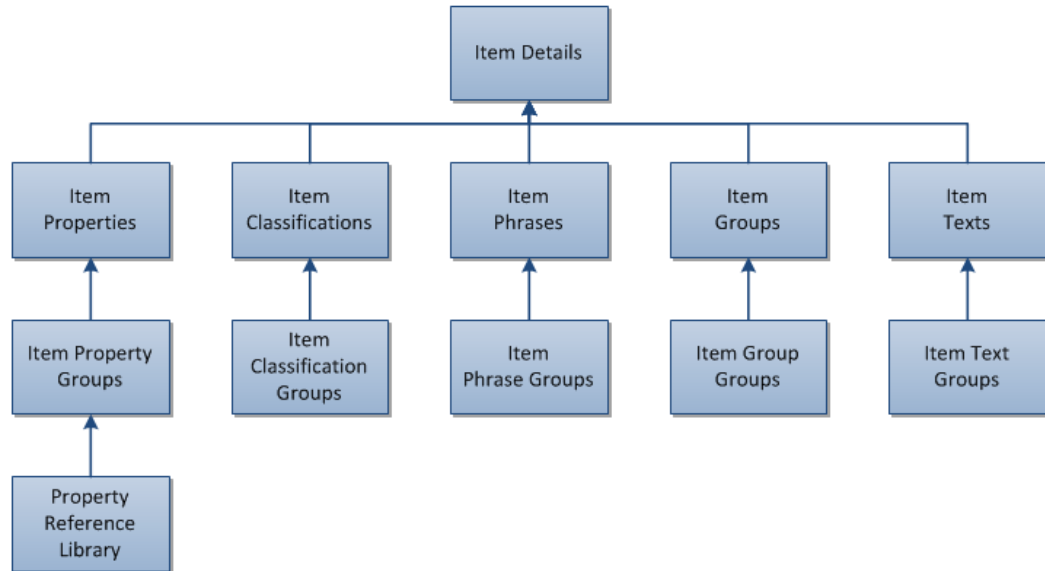
2.1 Introduction

The Item Details form is used to define the master data associated with an item. These data elements include the following:

- Revisions; to define valid to and from dates
- Batch Details; to choose batch template or serial template and define expiry/consume date and shelf life/inspection interval
- Properties; to define properties for example physical, chemical definitions, and nutritional details
- Classification; to categorize products for example toxic, non-toxic, hazard and non-hazard
- Phrases; to define for example EU phrases as part of MSDS, covering for example safety, hazard, and clean-up
- Groups; to group similar products together example acids and solvents
- Text ; to define for example hazard instructions, safety text and cleaning information in case of a product spillage
- Item Property Reference Library; to define the valid values of a property for example color; white, black, blue
- Attachments, to reference for example MSDS, work instructions, safety sheets, production videos

All of the above forms, except the Item Reference Library contain tick boxes for production orders, shipment documentation; pick lists, MSDS, purchase orders, returns and other.

These relationships not only document within the system, where these data elements are intended to be used, but also can be used as a reference when building reports and documents.



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2.2 Revisions

This form allows the user to define and record the revisions of an item.

Revisions are used to record the product life cycle of a parent and item within a Bill of Materials. Revisions can be used to vary product structure for the same product.

Revisions can be entered for the following documents:

- Sales Orders
- Manufacturing Orders
- Test Protocols and Quality Control Tests
- Complaints
- Item Costing
- Additional Batch Details

Revisions are not visible within Inventory.

2.2.1 Is MRP Default

The field "Is MRP Default" is defined within the Bill of Materials form, to define which revision is the default for MRP planning purposes.

If "Is MRP Default" is grayed out please create Bill of Materials with required Item Code and Revision.

Item Details

Item Code: Active-Item-02
Item Name: Active-Item-02
UoM: KG
Yield: 100.00

Accept Lower Qty:
Ignore Yield:

#	Revision Code	Revision Name	Status	Valid From	Valid To	Is Default	MRP Default	Costing Default	Internal lead time	Remarks
1	code00	default	Active			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
2			Active			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Remarks:

OK Cancel

Bill of Materials

Item Code: Active-Item-02 Type: Internal
Revision: code00
Quantity: 1.000 Total: 1.000
Factor: 1.000 Yield: 100.00
UoM: KG
Formula:

Distribution Rules: Project:
MRP Def:
Batch Size: 1.000

#	Sequence	Item Code	Description	Revision	Revision Description	Warehouse	Factor	Factor Description	Quantity	Scrap %	Yield	Result	Formula
1	10	Active-Item-01	Active-Item-01	code00	default	01	1.000		1.000	0.00	100.00	1.000	=U_Quantity()*U_Factor()*Iter
2	20	Active-Item-04	Active-Item-04	code00	default	01	1.000		1.000	0.00	100.00	1.000	=U_Quantity()*U_Factor()*Iter
3	0						0.000		0.000	0.00	100.00	0.000	

Remarks:

Add Cancel You Can Also

Reload Item Details form:

The screenshot shows the 'Item Details' window with the 'Revisions' tab selected. The table below shows the revision data:

#	Revision Code	Revision Name	Status	Valid From	Valid To	Is Default	MRP Default	Is Costing Default	Internal lead time	Remarks
1	cod600	default	Active			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		
2			Active			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

ProcessForce revisions behave in the same manner as SAP

- if both dates are empty – revision is valid all the time
- if Valid From date is set up – revision is valid from this date
- if Valid To date is set up – revision is valid to this date
- if both dates are set up – revision is valid between these dates

Four different statuses may be assigned to one revision:

- Active – revision is set and ready to work with
- Being Phased Out – is being prepared and is not ready to used
- Engineering – is ready but waiting to be accepted
- Obsolete – is not in use any more

2.2.2 Is Costing Default

This setting is relevant only for Items with Standard Valuation method and is used for Cost Roll-Over. When you perform Cost Roll-Over on an Item with Standard Valuation method on Revision that has *Is Costing Default* checkbox checked, [Stock Revaluation](#) is created on a price change.

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2.3 Batch Details

Yellow arrow navigates to:

- Administration → Setup → Stock Management → Batch Template Definition
- Administration → Setup → Stock Management → Serial Template Definition

This form allows the user to choose [batch or serial template for item](#). The user can select template from list or inherit from Item Group.

The user can also define [expiry date or consume by date \(or inherit from item group\)](#). If a user defines expiry date or consume by date, can also define amount of the days prior warning. This prior warning data is used within an Alert query to notify those batches that are arriving to their expiry date.

When creating a batch record, the expiry date is auto-calculated based on the shelf life interval.

Batch Queue Type and Default Batch / Quality Control Status for SAP / ProcessForce Receipt Documents options are available to set in Batches tab, in Item Details form. Default batch and quality control status can be set for SAP B1 and ProcessForce receipt documents.

The Inspection date is also auto-calculated for the batch, and is displayed within Batch Master Data form (see below)

The screenshot displays the 'Item Details' window with the 'Batches' tab selected. The form contains the following fields and options:

- Item Code:** Top-02 (with a yellow arrow pointing to it)
- Item Name:** Top-02
- UoM:** EA
- Yield:** 100.00
- Accept Lower Qty:**
- Ignore Yield:**
- Revisions:** (tab)
- Batches:** (active tab)
- Properties:** (tab)
- Classifications:** (tab)
- Phrases:** (tab)
- Origins:** (tab)
- Groups:** (tab)
- Texts:** (tab)
- Attachments:** (tab)
- Inherit from Item Group:** (checked)
- Batch Template:** 01 (with a yellow arrow pointing to it)
- Inherit from Item Group:** (checked)
- Serial Template:** (empty field)
- Inherit from Item Group:** (checked)
- Expiry Date:** (unchecked)
- Consume by date:** (unchecked)
- Warning Prior Expiry Days:** (empty field)
- Warning Prior Consume Days:** (empty field)
- Shelf Life interval:** 1d
- Expiry Eval Type:** Current date (dropdown menu)
- Expiry Eval Template:** (empty field)
- Inspection interval:** (empty field)
- Inherit from Item Group:** (checked)
- Batch Queue:** FIFO
- Inherit from Item Group:** (checked)
- Default Batch Status for SAP Receipt Docum:** Locked
- Default Quality Control Status for SAP Recei:** Inspection
- Default Batch Status for ProcessForce Receip:** Released
- Default Quality Control Status for ProcessFo:** Passed
- Remarks:** (empty text area)
- Buttons:** OK, Cancel

To get more information on this subject click [here](#).

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2.4 Properties

Yellow arrow navigates to:

- Administration → Setup → Item Details → Prop Item Property Groups
- Administration → Setup → Item Details → Property Reference Library

This form allows the user to add and remove [properties](#) for the item master. [Properties](#) define physical and chemical characteristics.

The user can select from a number of expressions to record for example a specific value or a from/to value dependent upon the expression.

Item Details

Item Code: Top-02
 Item Name: Top-02
 UoM: EA
 Yield: 100.00

Accept Lower Qty:
 Ignore Yield:

#	Property Code	Property Name	Expression	Range Value From	Range Value To	UoM	Reference Code	Reference Name	Remarks	Add Date	Update Date
1	01	Vapour Density	Equal	10.000	20.000	Air=10				2012-04-18	
2	03	Solubility in Water	Equal	0.000	0.000					2012-04-18	
3			Between		0.000						

Remarks:

Update Cancel

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2.5 Classifications

Yellow arrow navigates to:

- Administration → Setup → Item Details → Item Classifications

This form allows the user to add and delete [classification](#) codes for the item master. Classifications categorize products, e.g. as toxic or non-toxic. By checking required checkbox classification can be connected to the certain kinds of document.

Item Details

Item Code: Top-02
 Item Name: Top-02
 UoM: EA
 Yield: 100.00

Accept Lower Qty:
 Ignore Yield:

#	Classification Code	Classification Name	Valid From	Valid To	Production Orders	Shipment Documents	Pick Lists	MSDS	Purchase Orders	Returns	Other	Update Date
1	[C]	CORROSIVE	11.05.17	11.05.17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17
2	[T]	TOXIC	11.05.17	11.05.17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17
3					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17

Remarks:

OK Cancel

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2.6 Phrases

Yellow arrow navigates to:

- Administration → Setup → Item Details → Item Phrases refer to [safety or risk phrases](#) used to create Material safety data sheet. By checking required checkbox phrases can be connected to the certain kinds of document.

Item Details

Item Code: Top-02
 Item Name: Top-02
 UoM: EA
 Yield: 100.00

Accept Lower Qty:
 Ignore Yield:

#	Phrase Code	Phrase Name	Valid From	Valid To	Production Orders	Shipment Documents	Pick Lists	MSDS	Purchase Orders	Returns	Other	Update...
1	R23	Toxic by inhalation	11.05.17	11.05.17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17
2	R24	Toxic in contact with skin	11.05.17	11.05.17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17
3					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17

Remarks:

Update Cancel

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2.7 Origins

Country of Origin is the country of manufacture, production, or growth where the product comes from, and is used extensively to support Country of Origin labeling (COOL), traceability and specific ingredients in a Customers recipe.

Click [here](#) to find out more.

Item Details

Item Code: Top-02 (Yellow arrow) | Accept Lower Qty:
Item Name: Top-02 | Ignore Yield:
UoM: EA
Yield: 100.00

Revisions | Batches | Properties | Classifications | Phrases | **Origins** | Groups | Texts | Attachments

#	Country Code	Country Name
1	AO	Angola
2	AT	Austria
3	BS	Bahamas
4	DZ	Algeria
5		

Default Origin: Algeria

Copy From Another Item | Clear Origins

Remarks:

OK | Cancel

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2.8 Groups

Yellow arrow navigates to:

- Administration → Setup → Item Details → Item Groups

This form allows the user to add and delete groups for the item master. [Group](#) describe similar products, e.g. acids. By checking required checkbox groups can be connected to the certain kinds of document.

Item Details

Item Code: Top-02
 Item Name: Top-02
 UoM: EA
 Yield: 100.00

Accept Lower Qty:
 Ignore Yield:

Revisions	Batches	Properties	Classifications	Phrases	Origins	Groups	Texts	Attachments					
#	Group Code	Group Name	Valid From	Valid To	Production Orders	Shipment Documents	Pick Lists	MSDS	Purchase Orders	Returns	Other	Update Date	Add ...
1	01	Acids	11.05.17	11.05.17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17	11.05.17
2					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17	11.05.17

Remarks:

Update Cancel

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2.9 Texts

Yellow arrow navigates to:

- Administration → Setup → Item Details → Item Texts

This form allows the user to add and delete [item text](#) for the item master. Any text may be added, e.g. hazard instructions, safety texts. By checking required checkbox texts can be connected to the certain kinds of document.

Item Details

Item Code: Top-02
 Item Name: Top-02
 UoM: EA
 Yield: 100.00

Accept Lower Qty:
 Ignore Yield:

Revisions	Batches	Properties	Classifications	Phrases	Origins	Groups	Texts	Attachments				
#	Text Code	Text Name	Valid From	Valid To	Production Orders	Shipment Documents	Pick Lists	MSDS	Purchase Orders	Returns	Other	Update...
1	01	Contact with Skin and Eyes	11.05.17	11.05.17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17
2	02	Skin Exposure	11.05.17	11.05.17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17
3												

Remarks:

Update Cancel

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- Sales Item, Stock Item, Purchase Item, Fixed Assets Item - not checked in combination with Phantom Item - not checked for CoProduct production General Settings

When using license plates, ProcessForce will automatically create a licence plate number and add this record to the Item Master, with the Item Group code as defined.

- General Tab
 - Phantom Item - to be checked to define a phantom item within the Bill of Material
 - Issue Method - to define and Item Number as manual or back flush within the Bill of Materials and the Manufacturing Order
 - Serial and Batch Numbers - to utilise [Batch Template, Serial Template Definition](#) function
- Planning Tab
 - Procurement Method - Make or Buy values are used within Bill of Materials and Manufacturing Order components
- Right click navigation
 - Production → Item Details → Item Details
 - Production → Bill of Materials → Bill of Materials

2.12 Batch Template, Serial Template Definition

Here you can configure the default format of the batch number generator for creating batch and serial numbers during the receipt of Purchase and Production Orders. This information makes a traceability and a batch and serial management process much easier. You can set a number generating template that contains important information, e.g. date, time, item number or prefix.

Path

Administration → Setup → Stock
Management → Batch Template Definition

Here you can configure the format of the serial number generator for creating serial numbers.

Path

Administration → Setup → Stock
Management → Serial Template Definition

On this page:

- [Batch/Serial Template Allocation](#)
 - [General level](#)
 - [Item Group level](#)
 - [Item level](#)
- [Defining Batch Template](#)
 - [Example 1: Date](#)
 - [Example 2: Date and Time](#)
 - [Example 3: Adding prefix](#)
 - [Example 4: Embedding Item number](#)
 - [Example 5: Incremental batch number starting with 5 zeros, and maximum length of 6](#)
 - [Example 6: Using a specific value from a document in Batch generation template](#)
 - [Example 7: Current date + shelf interval](#)
 - [HANA Studio – test](#)
 - [Batch Template formula](#)
- [Defining Serial Template](#)

2.12.1 Batch/Serial Template Allocation

The Batch Template form is used to define the batch template number for products that are batch traceable. The formula is based on TSQL statements, therefore providing a very flexible batch number creation.



Batch templates (as well as Serial templates) can be set on three different levels:

- [general](#) - for all batch traced Items
- [for Item Group](#)
- [for a specific Item](#)

If a template is not specified for a specific level, a template from a level above is used.

General level

Path

Administration → System Initialization → General Settings → ProcessForce tab → Inventory tab

The screenshot shows the 'General Settings' window with the following configuration:

- Batch Number generated at MOR: Creating MOR
- Default template for batches: [Empty field]
- Default template for serial numbers: [Empty field]
- Expiry Eval Type: Current date
- Expiry Eval Template: [Empty field]
- Expiry Date
- Consume Date
- Warning Prior Expiry Days: [Empty field]
- Warning Prior Consume Days: [Empty field]
- Shelf Life Interval: Id
- Inspection Interval: [Empty field]
- Manual Issue Type: None
- Backflush Issue Type: None
- Default Batch Status for SAP Receipt Document: Released
- Default Batch Status for ProcessForce Receipt: Released
- Batch Queue Type: [Empty field]
- Revision based picking (Manual)
- Revision based picking (backflush)
- Manual Issue Behaviour: No
- Backflush Issue Behaviour: No
- Default Quality Control Status for SAP Receipt: Passed
- Default Quality Control Status for ProcessForce: Passed

You can use Batch Number generated at MOR option. To do this check Batch Number generated at MOR checkbox and choose one of the options. When choosing one of the Status options, batch will be generated on appropriate status change or on creation of a Manufacturing Order with specified status.

Note that when Batch Number generated at MOR option is checked, it is not possible to use Classification and MOR Number options on a [Batch Template](#).

Update

Usage of %MORDN% parameter when Batch Number generated at MOR option is checked will be possible in ProcessForce from official release of 9.20 PL06 R1 version.

Item Group level

Path

Administration → Setup → Inventory → Item Groups → ProcessForce tab

When checkboxes are unchecked it is possible to set a Batch or Serial template for an Item Group.

When checkboxes are checked, General Settings Batch or Serial template is used.

Item Groups - Setup

Item Group Name

General	Accounting	ProcessForce
<input checked="" type="checkbox"/> Inherit from General Settings		
Batch Template	⇒ 01	
<input checked="" type="checkbox"/> Inherit from General Settings		
Serial Template		
<input type="checkbox"/> Expiry Date	Warning Prior Expiry Days	
<input checked="" type="checkbox"/> Consume by date	Warning Prior Consume Days	
Shelf Life interval	Id	
Inspection interval		
Expiry Eval Type	Required date	
Expiry Eval Template		
Fixed Overhead		
Fixed Overhead %		
Variable Overhead		
Variable Overhead %		
<input checked="" type="checkbox"/> Inherit from General Settings		
Batch Queue		
<input checked="" type="checkbox"/> Inherit from General Settings		
Default Batch Status for SAP Receipt Docum	Locked	
Default Quality Control Status for SAP Recei	Inspection	
Default Batch Status for ProcessForce Receip	Released	
Default Quality Control Status for ProcessFo	Passed	
<input checked="" type="checkbox"/> Inherit from General Settings		
Items	=U_Quantity()*U_Factor()*Items.U_Factor(<sequence>)*Iter	
Coproducts	=U_Quantity()*U_Factor()*CoProducts.U_Factor(<sequence>)	
Scrap	=U_Quantity()*U_Factor()*Scraps.U_Factor(<sequence>)*Sc	
Phantoms	=U_Quantity()*U_Factor()*Phantoms.U_Factor(<sequence>);	
Yield		
CoProduct Yield		
ByProduct Yield		
Scrap Yield		

Add Cancel

Item level

Path

Stock Management → Item Details → Batch Details tab

When checkboxes are unchecked it is possible to set a Batch or Serial template for an Item.

When checkboxes are checked, Item Group Settings Batch or Serial template is used.

Item Details

Item Code soczewka
 Item Name Lens
 UoM
 Yield 0.00

Accept Lower Qty
 Ignore Yield

Revisions Batches Properties Classifications Phrases Origins Groups Texts Attachments

Inherit from Item Group
 Batch Template 01
 Inherit from Item Group
 Serial Template

Inherit from Item Group
 Expiry Date
 Consume by date
 Shelf Life interval 1d
 Inspection interval
 Inherit from Item Group
 Batch Queue FIFO
 Inherit from Item Group
 Default Batch Status for SAP Receipt Docum Locked
 Default Quality Control Status for SAP Recei Inspection
 Default Batch Status for ProcessForce Receip Released
 Default Quality Control Status for ProcessFo Passed

Warning Prior Expiry Days
 Warning Prior Consume Days
 Expiry Eval Type Current date
 Expiry Eval Template

Remarks

OK Cancel

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2.12.2 Defining Batch Template

It is possible to define a Batch Template as a distribution number or a Batch Template assigned for suppliers. To do that, pick a desired category (Dist Number or Suppl Batch tab).

Batch Template

Template Code
 Template Name

Dist Number Suppl Batch

Formula

Date Format yyyy-MM-dd
 Counter 0

Validate Formula

Date Counter Classification Item Code Mor Number Pick Number

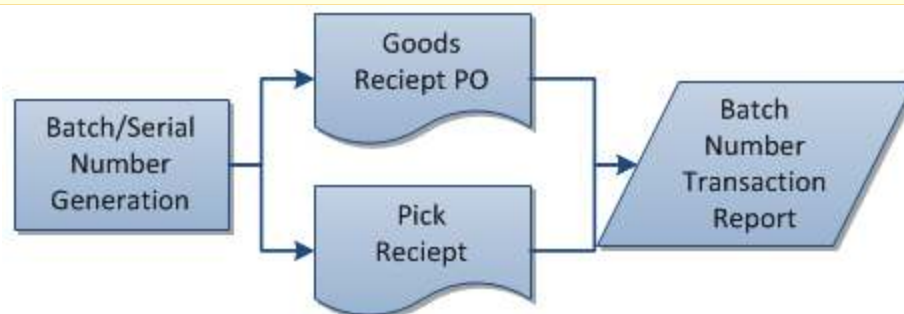
Add Cancel

It is possible to define a Serial Number Template as a distribution number, a number for manufacturing items or as a Lot Number. To do that, pick a desired category (Dist Number, Manufacturing or Lot Number tab).

When adding a new Batch/Serial template the date and counter fields are defaulted as follows:

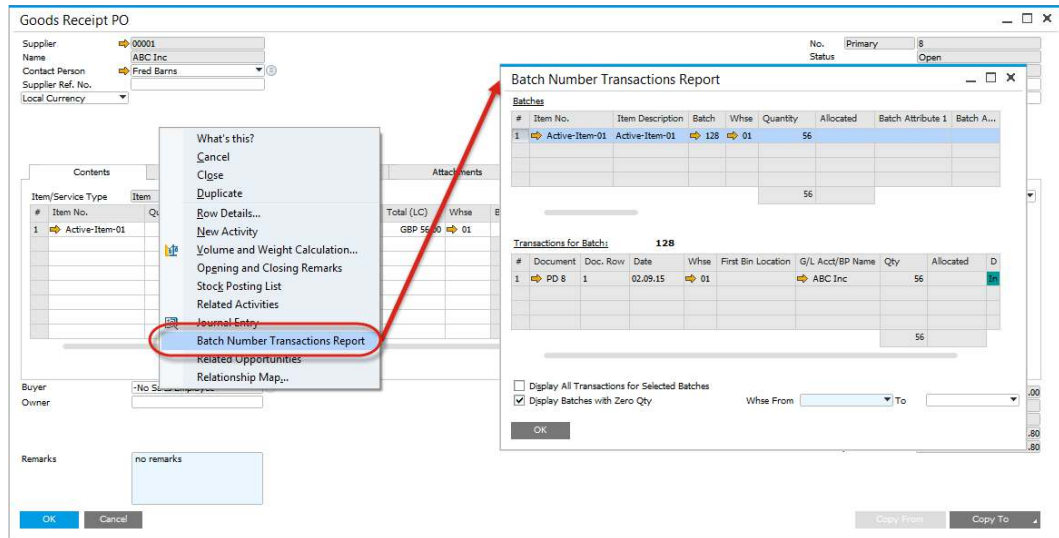
- Date = yyyy-MM-dd i.e. year-month-day
- Time = hh:mm:ss i.e hours:minutes:seconds
- Counter = 1. This is the starting value of the counter, it will increase starting with this value
- Maximum batch number = 32 characters, as per SAP Business One.

Note that Formula field is planned for 255 signs. Longer formulas will not work properly. You can use own databases procedure and scalar-valued functions.



How to reach Batch Number Transaction Report from Goods Receipt PO

Right click on Goods Receipt PO form:



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Example 1: Date

- Select the date function
- To string another element of data enter + sign

When working on ProcessForce on SAP HANA, please use || instead of + to string elements of a template

- To enter text or other symbols enter the value between ' and '
- Select the counter function
- Press the validate formula function to check the batch template syntax
- Press OK.

Batch Template

Template Code: Date

Template Name: Date

Dist Number | Suppl Batch

Formula: %Date%+''+%Counter%

Date Format: yyyy-MM-dd

Counter: 1

Validate Formula

Date | Counter | Classification | Item Code | Mor Number | Pick Number

Add | Cancel

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Example 2: Date and Time

- Select the date function
- To string another element of data enter + sign

When working on ProcessForce on SAP HANA, please use || instead of + to string elements of a template

- Select the counter function
- After the date format add : separator hh = hours, : separator mm = minutes
- Press the validate formula function to check the batch template syntax
- Press OK.

The screenshot shows a 'Batch Template' dialog box with the following fields and values:

- Template Code: DateTime
- Template Name: DateTime
- Dist Number: (empty)
- Suppl Batch: (empty)
- Formula: %Date%+%Counter%
- Date Format: yyyy-MM-dd:hh:mm
- Counter: 1

Buttons at the bottom include: Date, Counter, Classification, Item Code, Mor Number, Pick Number, Add, and Cancel. A 'Validate Formula' button is also present next to the Date Format field.

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Example 3: Adding prefix

- To enter text or other symbols as a prefix to the batch number use ' value ' = 'PF'
- To string another element of data enter + sign

When working on ProcessForce on SAP HANA, please use || instead of + to string elements of a template

- Select the date function
- To string another element of data enter + sign
- Select the counter function
- Press the validate formula function to check the batch template syntax
- Press OK

The screenshot shows a 'Batch Template' dialog box with the following fields and values:

- Template Code: Prefix
- Template Name: Prefix
- Dist Number: (empty)
- Suppl Batch: (empty)
- Formula: |PF'+%Date%+%Counter%
- Date Format: yyyy-MM-dd
- Counter: 1

Buttons include 'Validate Formula', 'Date', 'Counter', 'Classification', 'Item Code', 'Mor Number', 'Pick Number', 'Add', and 'Cancel'.

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Example 4: Embedding Item number

- To add the two first letters of the item number
 - enter left,
 - followed by (
 - select the item code function
 - followed by a ,
 - followed by the number of item code digits
 - followed by)
- To string another element of data enter + sign

When working on ProcessForce on SAP HANA, please use || instead of + to string elements of a template

- Select the date function
- To string another element of data enter + sign
- Select the counter function
- Press the validate formula function to check the batch template syntax
- Press OK

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Example 5: Incremental batch number starting with 5 zeros, and maximum length of 6

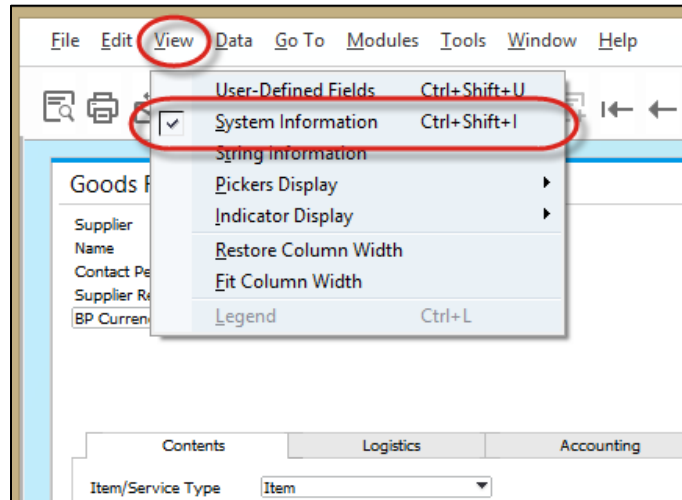
- Select the date function
- To string another element of data enter + sign

When working on ProcessForce on SAP HANA, please use || instead of + to string elements of a template

- To add an increasing number starting with 5 leading zeros
 - enter right,
 - followed by (
 - enter five zeros
 - followed by a ,
 - followed by length of the total batch number
 - followed by)
- To string another element of data enter + sign
- Select the counter function
- Press the validate formula function to check the batch template syntax

How to check a field name? Click to check

a) go to View → System Information and check the option (or click Ctrl + Shift + I):



b) point the field with a cursor – the name of the field will be displayed in System Messages Log:



Goods Receipt PO

Supplier
Name
Contact Person
Supplier Ref. No.
BP Currency

Contents Logistics Accounting Attachments

Item/Service Type

#	Item No.	Quantity	Unit Price	Discount %	VAT Code	Total (LC)	Whse	Bin Location	Alloca
1	Active-Item-01	1	GBP 1.00	0.00	I1	GBP 1.00	01		
2				0.00	I1				

Buyer
Owner

Remarks

System Messages Log (32)

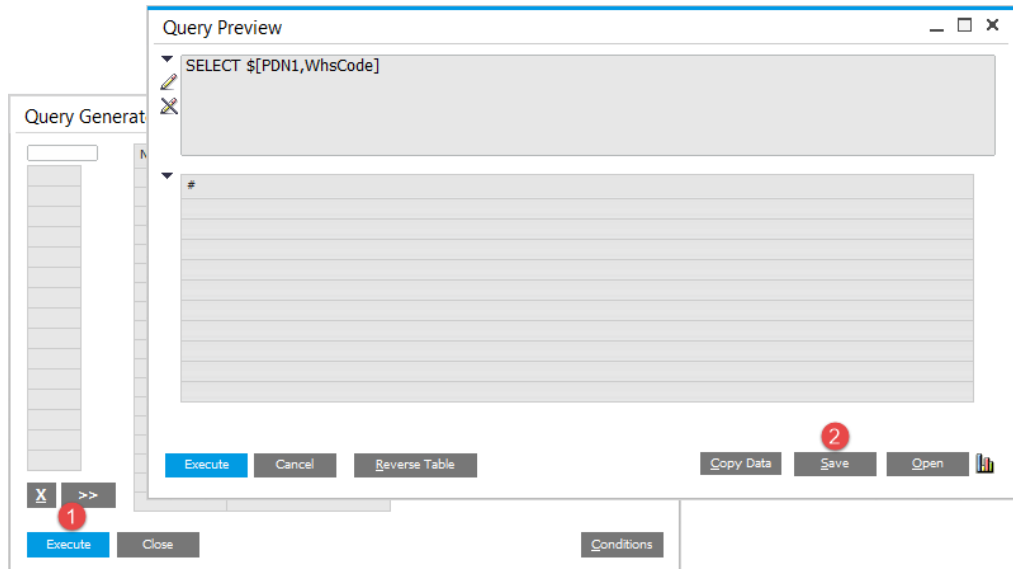
Errors Warnings Information 50 Last Messages to Display

#	Message
1	Operation completed successfully [Message 200-48]

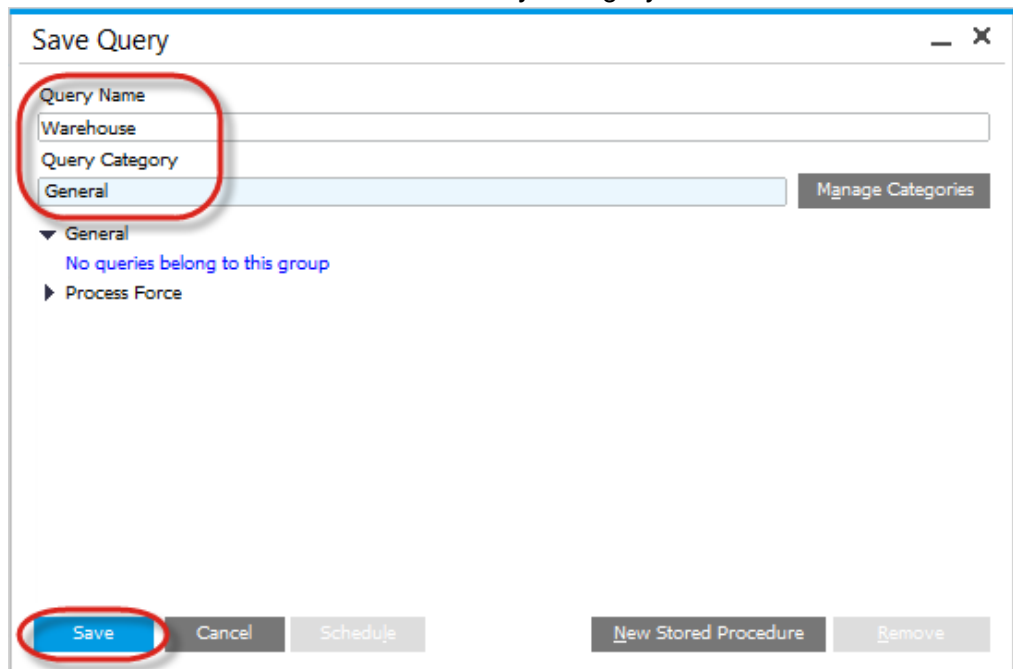
Warehouse Code
01 [Form=143 Item=38 Pane=1 Column=24 Row=1 Variable=1 PDN1.WhsCode]



Click Execute and then Save in new window:



Choose the name and Query Category and click Save:



2. Click Classification field on Goods Receipt PO and go to Tools → Customization Tools → User-Defined Values - Setup:

User-Defined Values - Setup

Without Search in User-Defined Values
 Search in Existing User-Defined Values
 Search in Existing User-Defined Values According to Saved Query

Warehouse

Auto Refresh

Whse

Refresh Regularly
 Display Saved User-Defined Values

Choose previously created query, set other values and click Update.

- From now on Classification field will be set on Whse value on every change on Whse field. Now if you would use Classification in Batch Template, a value for warehouse will be incorporated in the template. The same way you can set values from different field in the classification field and use it in a batch template.

Example 7: Current date + shelf interval

The following formula allows to generate a batch name with current date + shelf life time added.

The screenshot shows a software interface with several windows open. A red box highlights the 'Current date: 2015-12-01' in the top left. A red arrow points from this date to the 'Formula' field in the 'Batch Template' window, which contains the following formula:

```

(USE(ADD_DAYS(TO_DATE(CURRENT_DATE), (SELECT TO_INTEGER (FROM ('U_ShelfTime', 'F')) FROM REC_F0_C0017 WHERE TO_U_SumCode = 'N00000000')) as WARCHAR(30)))
  
```

Another red arrow points from the 'Batch Template' window to the 'Batches - Setup' window, which shows a table of batches. The 'Created Batches' table has the following data:

Batch	Qty	Batch Attribute 1	Batch Attribute 2	Expiry...
1	1			18.05.15

A third red arrow points from the 'Batches - Setup' window to the 'Goods Receipt' window, which shows a table of goods receipt items:

#	Item No.	Item Description	Qty	Unit Price	Total	Acc.
1	100	Receipt-02	1.000	GBP 23.07	GBP 23.07	00

SAP HANA Studio – test

To use the query for a specific Item use the following data:

```
SELECT cast(ADD_DAYS(TO_DATE(CURRENT_DATE), (SELECT TO_INTEGER
(RTRIM (T0."U_ShelfTime", 'd'))
FROM "@CT_PF_OIDT" T0 WHERE T0."U_ItemCode" = 'your item code')) as
NVARCHAR(36)) FROM DUMMY
```

Batch Template formula

The whole query result has to be converted/cast as text:

```
cast(ADD_DAYS(TO_DATE(CURRENT_DATE), (SELECT TO_INTEGER (RTRIM
(T0."U_ShelfTime", 'd')) FROM "@CT_PF_OIDT" T0 WHERE
T0."U_ItemCode" = %ItemCode%)) as NVARCHAR(36))
```

The result of the formula has to be text value (NVARCHAR type, 36 characters; it is performed by using "cast" command).

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2.12.3 Defining Serial Template

Serial Template defining process looks the same as Batch Template defining process shown in examples above.

2.13 Properties

This form allows the user to define a specific property – physical and chemical characteristics, e.g. colour.

The corresponding groups and subgroups can also be defined for example physical and colour.

A list of valid values may also be defined from the reference library for example colour has valid values of yellow, blue, red and green.

Checking the Quality Control Testing box implies that the Item Property will be used during the QC testing process.

On this page

- [Item Properties](#)
- [Item Property Groups](#)
- [Property Reference Library](#)
- [Properties assigning](#)
 - [Item Details](#)
 - [Batch Master Data](#)

2.13.1 Item Properties

Path

Administration → Setup → Item Details → Item Properties

Item Property

Code: 07
Name: Colour
UoM:

Group: Physical
Subgroup:

Quality Control Testing
 Production Orders
 Shipment Documentation
 Pick Lists
 MSDS
 Purchase Orders
 Returns
 Other

#	Reference Code	Reference Name	Remarks
1	→ 01	White	
2	→ 02	Red	
3	→ 03	Yellow	
4	→		

OK Cancel

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2.13.2 Item Property Groups

Path

Administration → Setup → Item Details → Item Property Groups

This form allows the user to define a property group and its details.

You can define a name, a code and remarks for a specific property group.

For every group, a number of subgroups with its own name, code and remarks can be defined.

For example physical, with sub-groups of form and colour.

Item Property Group

Code: 01
Name: Physical

#	Subgroup Code	Subgroup Name	Remarks
1	01	Form	
2	02	Colour	
3			

Remarks

Update Cancel

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2.13.3 Property Reference Library

Path

Administration → Setup → Item Details → Property Reference Library

This form allows the user to create a library of valid values to be used in conjunction with properties.

These valid values, can be available for a single property type or for several property types, relating to items, resources, operations and operation inputs and outputs.

Property Reference Library

Code: 12
Name: Metal Test

Available for:

- Item Property
- Test Property
- Resource Property
- Operation Property
- Operation I/O Property

Remarks

OK Cancel

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2.13.4 Properties assigning

Item Details

Once created property can be assign to an item in Item Details form, Properties tab. By clicking a second column and than a circle displayed within a field, a property can be chosen:

The screenshot shows the 'Item Details' form with the 'Properties' tab selected. The 'Item Code' is 'soczewka' and 'Item Name' is 'soczewka'. The 'Yield' is '0.00'. A red arrow points from the second column of the 'Properties' table to a small circle icon in the 'Property Name' field of the first row. A modal window titled 'List of Item Properties' is open, displaying a list of properties with 'Vapour Density' selected.

#	Property Code	Property Name	Expression	Range Value From	Range Value To	UoM	Reference Code	Reference Name	Remarks	Add Date	Update Date
1			Equal	0.000	0.000						

Modal window: List of Item Properties

#	Property Code	Property Name
1	01	Vapour Density
2	02	Specific Gravity @20DegC
3	03	Solubility in Water
4	04	Vapour Pressure
5	05	Odor
6	06	Appearance
7	07	Colour
8	08	Melting Point
9	09	Boiling Point
10	10	pH

A chosen item group can be assigned to a specific type of a document by checking a proper check-box:

The screenshot shows the 'Item Details' form with the 'Groups' tab selected. The 'Item Code' is 'Top-02' and 'Item Name' is 'Top-02'. The 'UoM' is 'EA' and 'Yield' is '100.00'. The 'Group Code' is '01' and 'Group Name' is 'Acids'. The 'Valid From' and 'Valid To' dates are '11.05.17'. The 'Production Orders', 'Shipment Documents', 'Pick Lists', 'MSDS', 'Purchase Orders', 'Returns', and 'Other' columns have checkboxes.

#	Group Code	Group Name	Valid From	Valid To	Production Orders	Shipment Documents	Pick Lists	MSDS	Purchase Orders	Returns	Other	Update Date	Add ...
1	01	Acids	11.05.17	11.05.17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17	11.05.17
2					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17	11.05.17

Batch Master Data

Path

Stock Management → Item Management → Batches → Batch Master Data

Predefined properties can be assign to a specific batch of a product.

The screenshot shows the 'Batch Master Data' application window. The 'Properties' tab is active, displaying a table with columns: #, Property Code, Property Name, Expression, Range Value From, Range Value To, and Actual Value. The first row contains the value '1' in the # column. A red arrow points from this row to a 'List of Item Properties' dialog box. This dialog box has a search field and a list of properties with columns: #, Property Code, and Property Name. The list includes: 1 01 Vapour Density, 2 02 Specific Gravity @20DegC, 3 03 Solubility in Water, 4 04 Vapour Pressure, 5 05 Odor, 6 06 Appearance, 7 07 Colour, 8 08 Melting Point, 9 09 Boiling Point, and 10 10 pH. The 'Choose' button is highlighted in blue.

#	Property Code	Property Name	Expression	Range Value From	Range Value To	Actual Value
1			Equal	0.000	0.000	0.000

#	Property Code	Property Name
1	01	Vapour Density
2	02	Specific Gravity @20DegC
3	03	Solubility in Water
4	04	Vapour Pressure
5	05	Odor
6	06	Appearance
7	07	Colour
8	08	Melting Point
9	09	Boiling Point
10	10	pH

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2.14 Item Classifications

The Item Classification function allows the user to define specific classification with its name and code, for example corrosive, toxic, and nontoxic. Classifications can be grouped.

On this page:

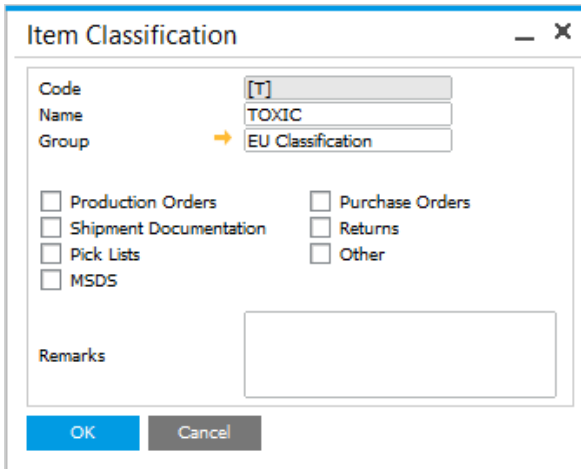
- [Item Classifications](#)
- [Item Classification Groups](#)
- [Item Classification assigning](#)

2.14.1 Item Classifications

Path

Administration → Setup → Item Details → Item Classification

In this form you can define a specific classification. You can also choose on what kind of documents a specific classification can be used (by checking a corresponding check-box).



The screenshot shows a window titled "Item Classification". It contains the following fields and options:

- Code: [T]
- Name: TOXIC
- Group: EU Classification
- Checkboxes:
 - Production Orders
 - Shipment Documentation
 - Pick Lists
 - MSDS
 - Purchase Orders
 - Returns
 - Other
- Remarks: (empty text box)
- Buttons: OK, Cancel

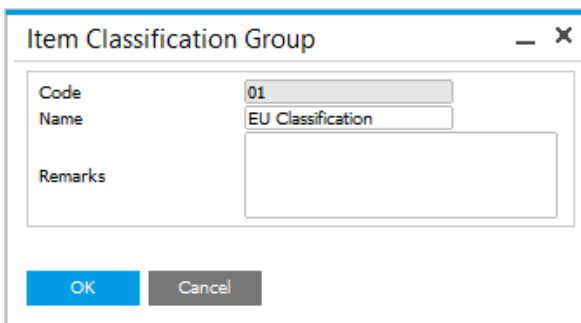
[↑ Top](#)

2.14.2 Item Classification Groups

Path

Administration → Setup → Item Details → Item Classification Groups

The Item Classification Group function allows the user to create groups of item classifications for example EU Classifications.



The screenshot shows a window titled "Item Classification Group". It contains the following fields and options:

- Code: 01
- Name: EU Classification
- Remarks: (empty text box)
- Buttons: OK, Cancel

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2.14.3 Item Classification assigning

Once created classification can be assign to an item in Item Details form, Classifications tab. By clicking a second column and then a circle displayed within a field, a classification may be chosen:

The screenshot shows the 'Item Details' form with the 'Classifications' tab selected. The 'Classifications' table has two rows. Row 1 has a dropdown arrow in the 'Classification Code' column and a circle in the 'Production Orders' column. Row 2 has a circle in the 'Production Orders' column. A red arrow points from the circle in row 2 to a dialog box titled 'List of Item Classifications'. The dialog box has a search field and a table with two rows: row 1 with code '[C]' and name 'CORROSIVE', and row 2 with code '[T]' and name 'TOXIC'. The dialog has 'Choose' and 'Cancel' buttons.

#	Classification Code	Classification Name	Valid From	Valid To	Production Orders	Shipment Documents	Pick Lists	MSDS	Purchase Orders	Returns	Other	Update Date
1	[C]	CORROSIVE	11.05.17	11.05.17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17
2					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15.05.17

A chosen classification can be assigned to a specific type of a document by checking a proper check-box:

The screenshot shows the 'Item Details' form with the 'Classifications' tab selected. The 'Classifications' table is the same as in the previous screenshot. A red circle highlights the 'Production Orders' checkbox for classification 1, which is currently unchecked.

#	Classification Code	Classification Name	Valid From	Valid To	Production Orders	Shipment Documents	Pick Lists	MSDS	Purchase Orders	Returns	Other	Update Date
1	[C]	CORROSIVE	11.05.17	11.05.17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11.05.17
2					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15.05.17

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2.15 Phrases

The Item Phrase form allows the user to define a specific phrase. Safety or Risk Phrases contain information about e.g. special transport and storage requirements or hazards. Phrases are defined in specific regulation e.g. EU Risk and Safety Phrases. ProcessForce Item Phrases functionality is also useful in creating a Material Safety Data Sheet for a specific item.

On this page

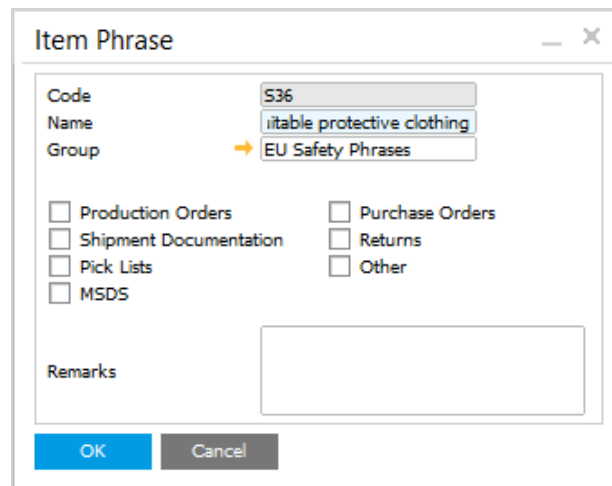
- [Item Phrases](#)
- [Item Phrase Groups](#)
- [Item Phrase Group assigning](#)
- [Item Phrase assigning](#)

2.15.1 Item Phrases

Path

Administration > Setup > Item Details > Item Phrases

You can choose on what kind of document a specific Item Phrase can be used (by checking a corresponding check-box).



The screenshot shows a window titled "Item Phrase" with a close button (X) in the top right corner. The form contains the following fields and options:

- Code:** S36
- Name:** itable protective clothing
- Group:** EU Safety Phrases
- Checkboxes:**
 - Production Orders
 - Shipment Documentation
 - Pick Lists
 - MSDS
 - Purchase Orders
 - Returns
 - Other
- Remarks:** A large empty text area.
- Buttons:** OK (blue) and Cancel (grey).

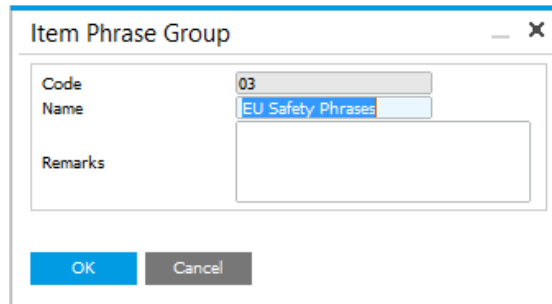
[↑ Top](#)

2.15.2 Item Phrase Groups

Path

Administration > Setup > Item Details > Item Phrase Group

The Item Phrase Group functions allow the user to create groups of standard phrases, for example EU Risk and EU Safety Phrases.



Item Phrase Group

Code: 03
Name: EU Safety Phrases
Remarks:

OK Cancel

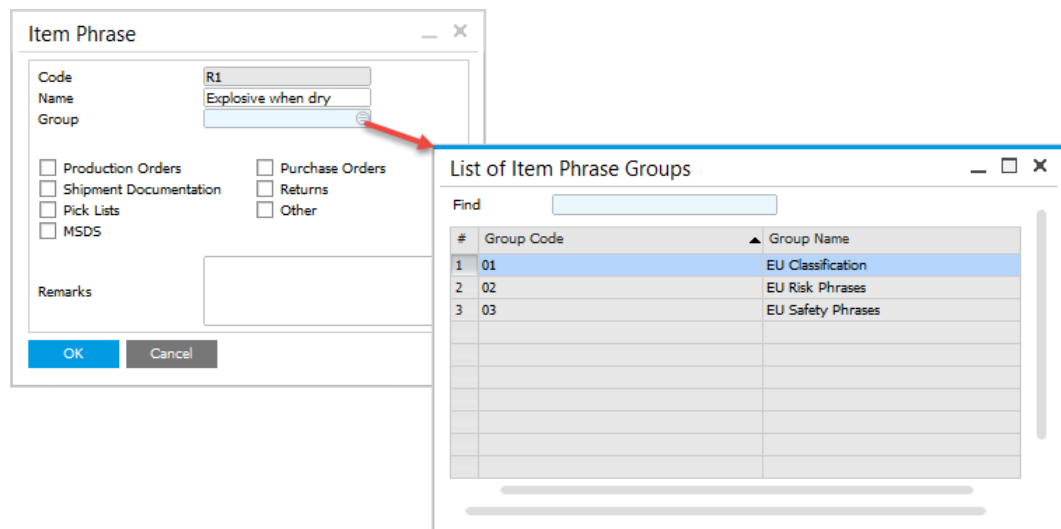
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2.15.3 Item Phrase Group assigning

Path

Administration > Setup > Item Details > Item Phrases

The user can assign an Item Phrase Group to an Item Phrase by clicking a Group field and then a circle displayed within the field and choosing a group:



Item Phrase

Code: R1
Name: Explosive when dry
Group:

Production Orders Purchase Orders
 Shipment Documentation Returns
 Pick Lists Other
 MSDS

Remarks:

OK Cancel

List of Item Phrase Groups

Find:

#	Group Code	Group Name
1	01	EU Classification
2	02	EU Risk Phrases
3	03	EU Safety Phrases

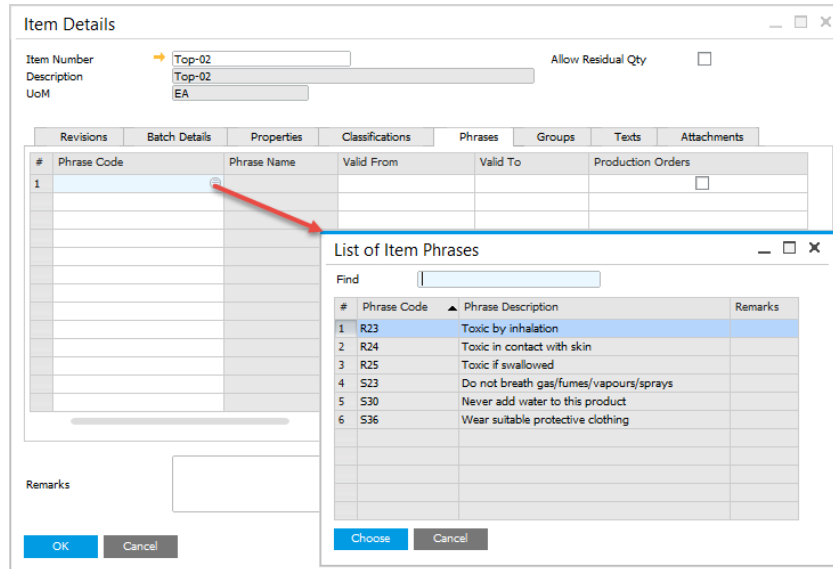
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2.15.4 Item Phrase assigning

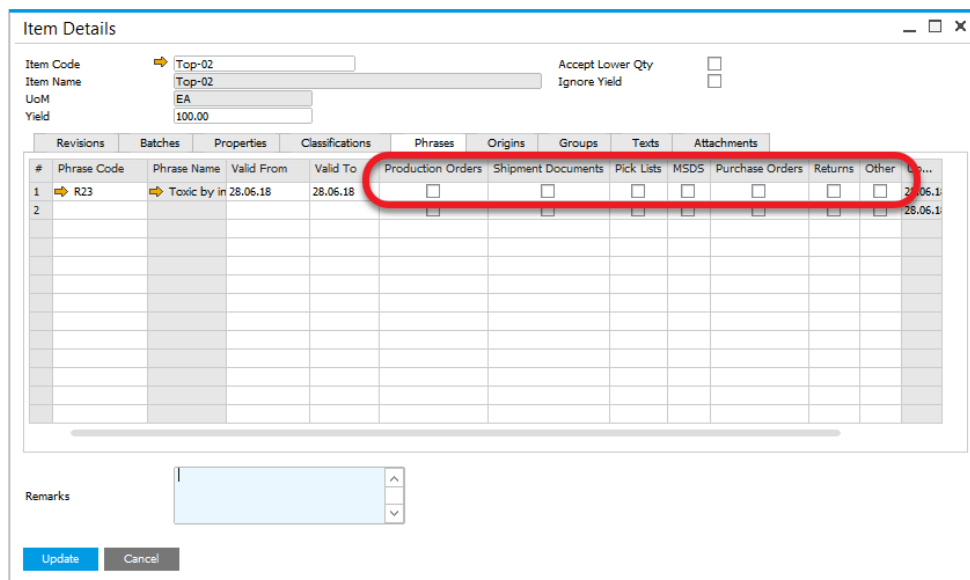
Path

Inventory → Item Details → Phrases tab

Once created phrase may be assign to an item in Item Details form, Phrases tab. By clicking a second column and then a circle displayed within a field, a proper phrase may be chosen:



A chosen phrase may be assigned to a specific type of a document by checking a proper check-box



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2.16 Item Groups

The Item Group function allows the user to create groups of similar products, for example acids, solvents, boxes, and bottles. A higher level is available too: groups of groups.

On this page:

- [Item Groups](#)
- [Item Group Groups](#)
- [Item Group assigning](#)
- [Item Group Group assigning](#)

2.16.1 Item Groups

Path

Administration > Setup > Item Details > Item Groups

The screenshot shows a dialog box titled "Item Group". It has a title bar with a minus sign and a close button (X). The dialog contains the following fields and options:

- Code:** A text box containing "01".
- Name:** A text box containing "Acids".
- Group:** A dropdown menu showing "Chemicals" with a yellow arrow pointing to the right.
- Checkboxes:** Two columns of checkboxes:
 - Left column: Production Orders, Shipment Documentation, Pick Lists, MSDS.
 - Right column: Purchase Orders, Returns, Other.
- Remarks:** A text area with the label "Remarks" to its left.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

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2.16.2 Item Group Groups

Path

Administration > Setup > Item Details > Item Group Groups

The Item Group Group function allows user to define a grouping of a grouping, which is used to group similar sub-sets of items together, to aid in reporting and analysis.

For example an item can belong to the group boxes and another grouping packaging.

The 'Item Group Group' dialog box is shown with the following details:

- Code: 02
- Name: Packaging
- Remarks: (empty text area)
- Buttons: OK, Cancel

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2.16.3 Item Group assigning

A once created item group can be assign to an item in Item Details form, Groups tab. By clicking a second column and than a circle displayed within a field, a proper Item Group can be chosen:

The 'Item Details' form is shown with the 'Groups' tab selected. The table below shows the data in the 'Groups' tab:

#	Group Code	Group Name	Valid From	Valid To	Production Orders	Shipment Documents	Pick Lists	MSDS	Purchase Orders	Returns	Other	Update Date	Add Date
1					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

The 'List of Item Groups' dialog box is shown with the following details:

- Find: (empty search field)
- Table with 1 row: Group Code 01, Group Description Acids
- Buttons: Choose, Cancel

A chosen group can be assigned to a specific type of a document by checking a proper check-box:

Item Details

Item Number: Top-02
 Description: Top-02
 UoM: EA

Allow Residual Qty:

#	Group Code	Group Name	Valid From	Valid To	Production Orders	Shipment Documents	Pick Lists	MSDS	Purchase Orders	Returns	Other	Update Date	Add Date
1	01	Acids	29.01.15	29.01.15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	29.01.15	29.01.15
2					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	29.01.15	29.01.15

Remarks:

Update Cancel

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2.16.4 Item Group Group assigning

A once created item group group can be assign to an Item Group. By clicking a group field and then a circle displayed within a field, a proper Item Group Group can be assigned:

Item Group

Code: 01
 Name: Acids
 Group: Chemicals

Production Orders Purchase Orders
 Shipment Documentation Returns
 Pick Lists Other
 MSDS

Remarks:

OK Cancel

List of Item Group Groups

Find:

#	Group Code	Group Name
1	01	Chemicals
2	02	Packaging

Choose Cancel

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2.17 Item Texts

The Item Text functions allow the user to define a set of standard texts that are used to describe the item.

For example define hazard instructions, safety text and cleaning information in case of a product spillage. You can specify on what kind of document specific Item Text will be used by checking corresponding check-box.

On this page:

- [Item Texts](#)
- [Item Text Groups](#)
- [Item Text assigning](#)

2.17.1 Item Texts

Path

Administration > Setup > Item Details > Item Texts

Item Text

Code: 09
Name: Contact with Skin & Eye!
Group:

Production Orders Purchase Orders
 Shipment Documentation Returns
 Pick Lists Other
 MSDS

Remarks: Corrosive - Contact may cause redness, pain and severe burn can occur. Contact with eyes may cause blurred vision, redness, pain and

OK Cancel

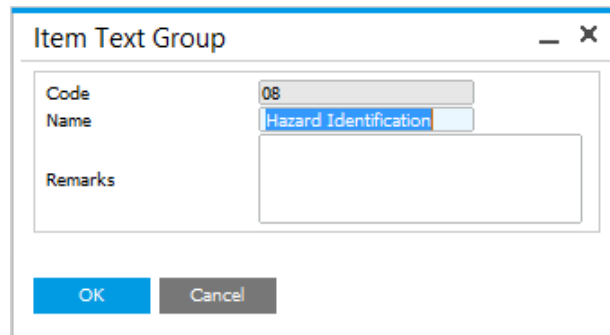
[↑ Top](#)

2.17.2 Item Text Groups

Path

Administration > Setup > Item Details > Item Text Groups

The Item Text Group function allows the user to define a Item Text Group, which is used to group similar item texts together.



Item Text Group

Code: 08

Name: Hazard Identification

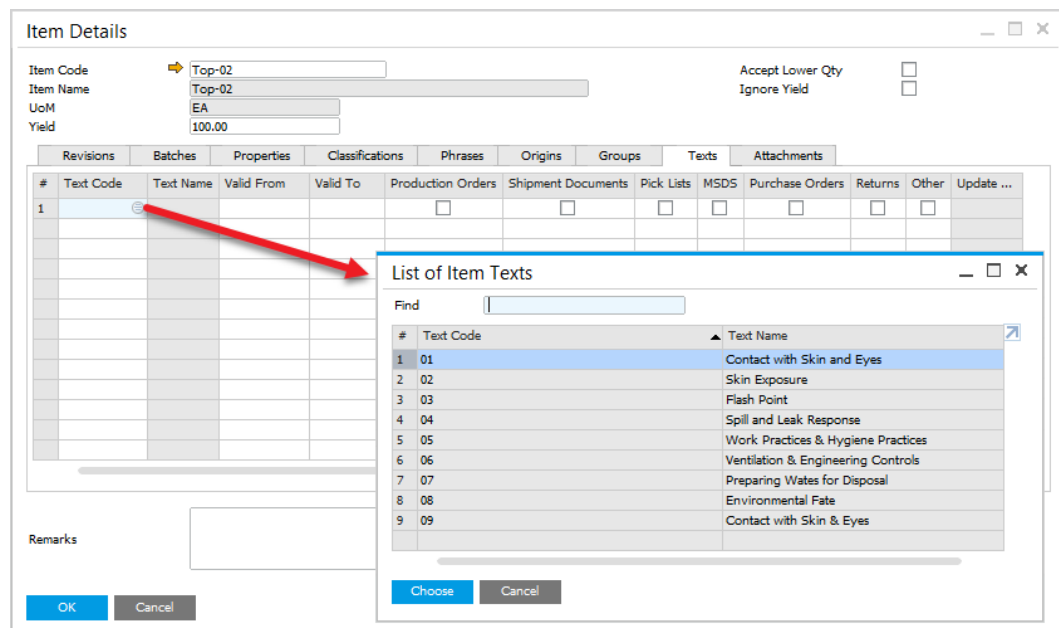
Remarks:

OK Cancel

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2.17.3 Item Text assigning

A once created item text can be assign to an item in Item Details form, Texts tab. By clicking a second column and than a circle displayed within a field, a proper Item text can be chosen:



Item Details

Item Code: Top-02

Item Name: Top-02

UoM: EA

Yield: 100.00

Accept Lower Qty:

Ignore Yield:

Revisions Batches Properties Classifications Phrases Origins Groups Texts Attachments

#	Text Code	Text Name	Valid From	Valid To	Production Orders	Shipment Documents	Pick Lists	MSDS	Purchase Orders	Returns	Other	Update ...
1					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Remarks:

OK Cancel

List of Item Texts

Find:

#	Text Code	Text Name
1	01	Contact with Skin and Eyes
2	02	Skin Exposure
3	03	Flash Point
4	04	Spill and Leak Response
5	05	Work Practices & Hygiene Practices
6	06	Ventilation & Engineering Controls
7	07	Preparing Wates for Disposal
8	08	Environmental Fate
9	09	Contact with Skin & Eyes

Choose Cancel

A chosen text can be assigned to a specific type of a document by checking a proper check-box.

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2.18 MSDS, Labels and Documentation

2.18.1 Compliance Data

Industries which sell their products both locally and internationally have to provide their customers with documents such as Material Safety Data Sheet (MSDS) in a applicable language as supporting documentation for shipping.

Using a combination of the forms listed below MSDS master data can be defined.

- Classification
- Phrases
- Texts
- Groups
- Properties

On this page:

- [Compliance Data](#)
- [Configuration](#)
- [Example](#)

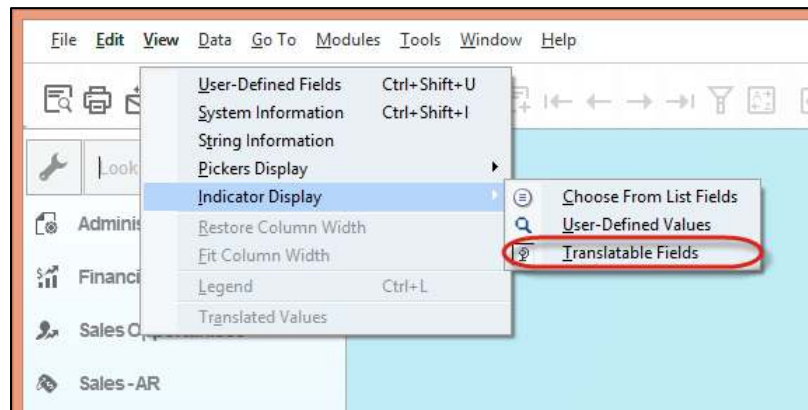
2.18.2 Configuration

- Within Company Details > Basic Initialization Tab, check the Multi-Language Support field:

The screenshot shows the 'Company Details' dialog box with the 'Basic Initialization' tab selected. The 'Multi-Language Support' checkbox is checked and circled in red. Other visible settings include:

- Chart of Accounts Template: GB_CoA
- Local Currency: British Pound
- System Currency: British Pound
- Default Account Currency: All Currencies
- Display Credit Balance with Negative Sign
- Use Segmentation Accounts
- Allow Negative Amounts for Reversal Transaction Posting
- Permit More than One Document Type per Series
- Multi-Language Support
- Use Continuous Stock
- Item Groups Valuation Method: Moving Average
- Manage Item Cost per Warehouse
- Use Purchase Accounts Posting System
- Allow Stock Release Without Item Cost
- Manage Serial and Batch Cost By:
 - Items Group Valuation Method
 - Serial/Batch Valuation Method
- Ordering Party: House Bank
- Default Bank Country: United Kingdom
- Default Bank: [Dropdown]
- Default Account No.: [Dropdown]
- Default Branch: [Dropdown]
- Install Bank Statement Processing
- Enable Intrastat
- Enable Fixed Assets
- Enable Multiple Branches
- Mask Credit Card Number
- Enable Advanced G/L Account Determination
- Allow Selection of Any Account Type for Revenue Accounts

Within View > Indicator Display, select Translatable Fields



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2.18.3 Example

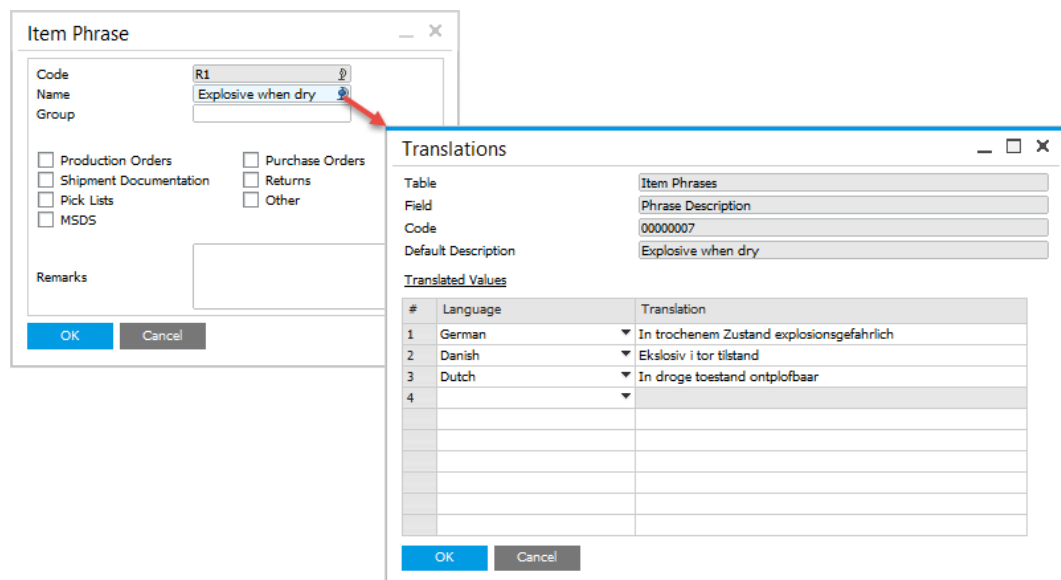
Phrases form is used to define the EU Phrases lists. The code is the same in all countries but the name is different for each languages. Data source:

<http://schoolscout24.de/cgi-bin/rsp/rspinput.cgi>

Czech **R1** Výbušný v suchém stavu.

Dansk **R1** Eksplosiv i tør tilstand.

Dutch **R1** In droge toestand ontplofbaar.



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2.19 Substitute Items

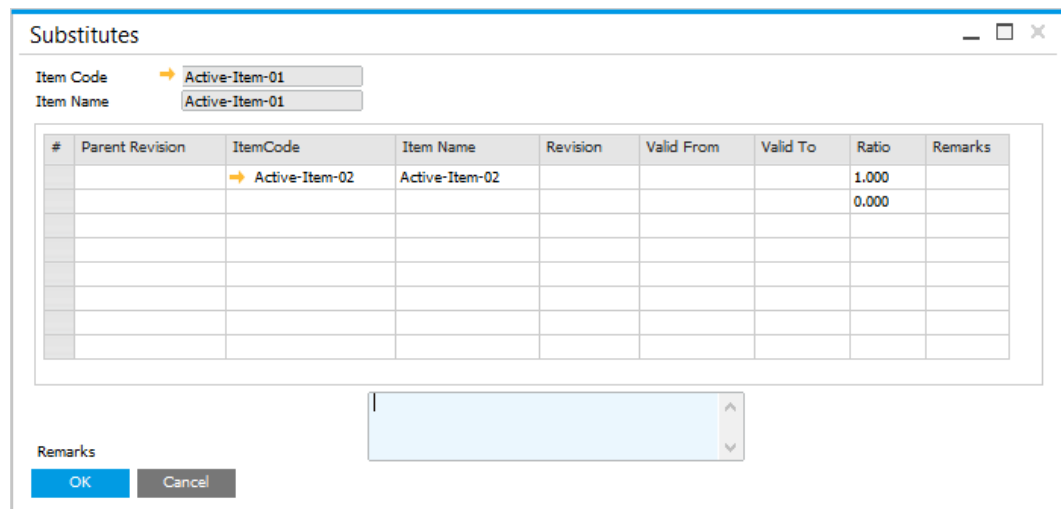
Path

Main Menu > Stock Management > Substitutes

It is possible to assign a replacement for any Item. If a specific Item is not currently available in Warehouses, it can be replaced by a Substitute assign to it.

It is possible to set following settings for a Substitute:

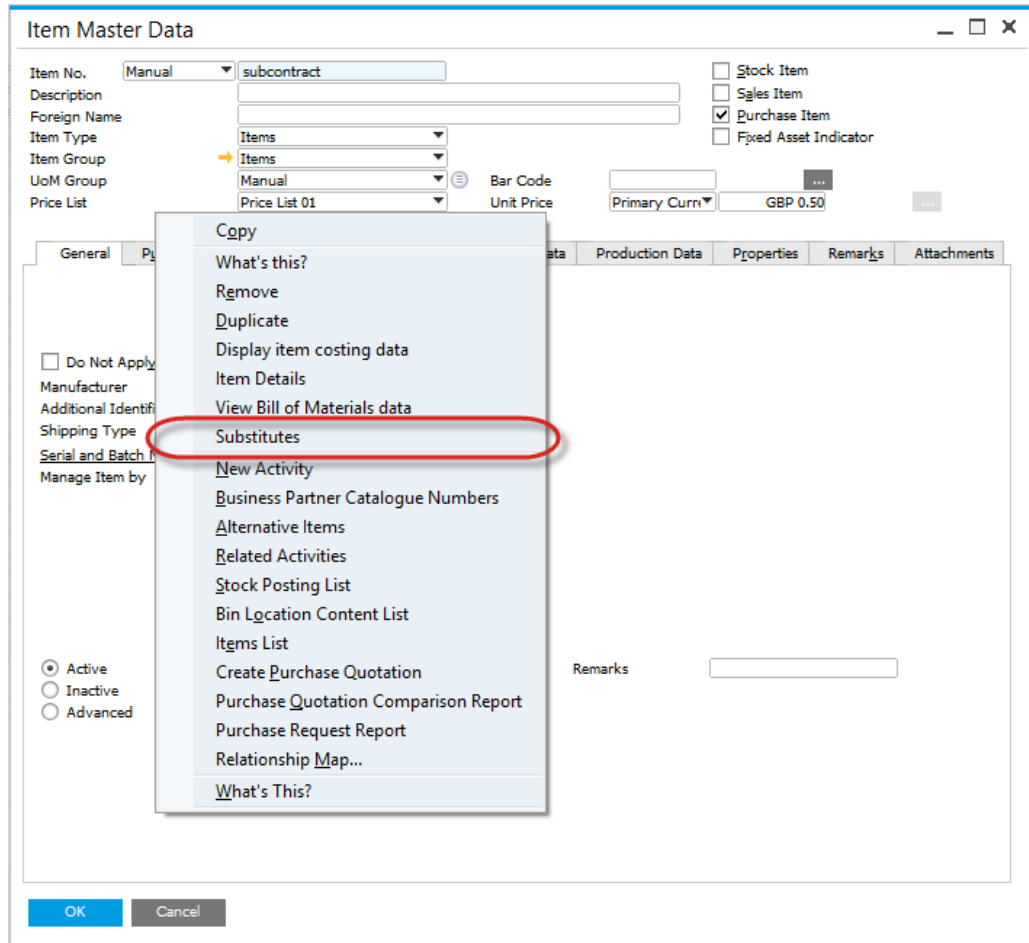
- Parent Item Revision
- Item to be a Substitute
- Revision for Item to be a Substitute
- Time constraints for a Substitute validity
- Ratio – value expressed in decimal setting a ratio of replacement, e.g.:
 - 1.00 = 100%
 - 0.5 = 50%
 - 1.50 = 150%



#	Parent Revision	ItemCode	Item Name	Revision	Valid From	Valid To	Ratio	Remarks
		→ Active-Item-02	Active-Item-02				1.000	
							0.000	

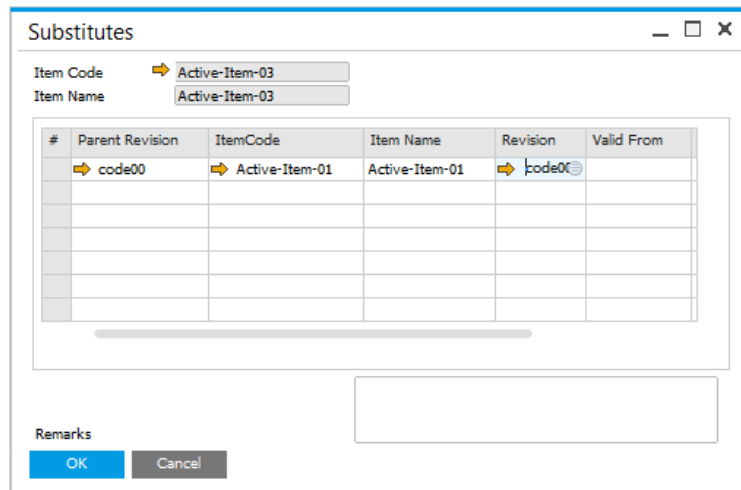
2.19.1 Item Master Data context menu

You can also reach Substitutes form from Item Master Data context menu:



2.19.2 Usage

You can change a specific Item for its Substitute on Pick Order by using Choose From List option for an Item:



Pick Order

Number: 30 No.: Primary Date: 21.11.16
 Status: Opened Ref2:

#	Document Type	Business Partner Code	Business Partner Name	Item Code	Item Name	Revision Code	Planned Quantity	Issued Quantity	Picked Q...
1	Goods Issue			Active-Item-01	Active-Item-01	code00	3,500	0,000	
2	Goods Issue			Active-Item-04	Active-Item-04	code00	7,500	0,000	
3	Goods Issue			Active-Item-03	Active-Item-03	code00	30,000	0,000	
4	Goods Issue			Active-Item-03	Active-Item-03	code00	30,000	0,000	
5							0,000	0,000	

Employee: Remarks:

Update Cancel Copy From

List of Items

Find:

#	Item No.	Item Description	In Stock
1	Active-Item-01	Active-Item-01	7,086
2	Active-Item-03	Active-Item-03	1,468

Choose Cancel New

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2.20 Yield Master Data

The default planned Yield % value is added on the Item Details form.

When the Item Detail record is created the Yield % value is set to 0.00.

If Yield % is not used within the Bill of Material, check the Ignore Yield field.

Item Details

Item Number: Recipe-02 Allow Residual Qty:
 Description: Recipe-02 Ignore Yield:
 UoM: KG
 Yield: 90.00

#	Revision Name	Status	Valid From	Valid To	Is Default	Is MRP Default	Is Costing...
1	default	Active			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2		Active			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Revisions Batch Details Properties Classifications Phrases Groups Texts Attachments

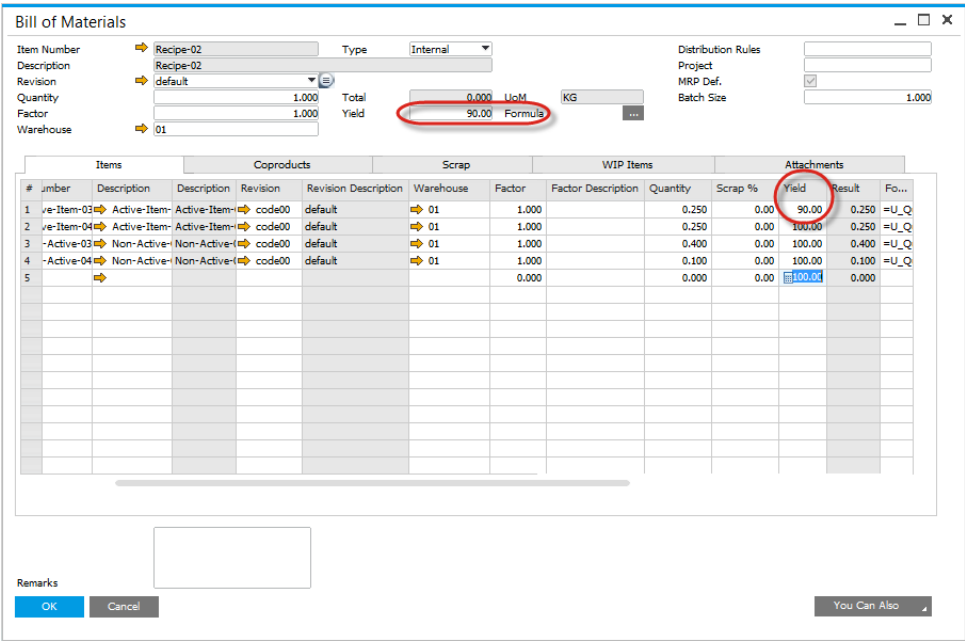
Remarks:

OK Cancel

If the item is a Parent item, the default Yield % value is copied to the Bill of Materials form header and if the Item is added to the Items, Coproducts and Scrap tab, this value is copied to the Yield field within the grid.

If the Ignore Yield field is checked then the Yield field within the Items, Coproducts and Scrap tabs will be set to 100.00.

These Yield values can be changed if required.



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2.21 Country of Origin

Country of Origin is the country of manufacture, production, or growth where the product comes from, and is used extensively to support Country of Origin labelling (COOL), traceability and specific ingredients in a Customers recipe.

To support this process, the associated master data are defined on the Item Details form.

On this page:

- [Origins Tab](#)
- [Batch Creation](#)
- [Batch Record](#)
- [Batch Selection](#)

Path:

Inventory > Item Details > Origins tab

2.21.1 Origins Tab

Item Details

Item Code: Top-02
Item Name: Top-02
UoM: EA
Yield: 100.00

Accept Lower Qty:
Ignore Yield:

Revisions | Batch Details | Properties | Classifications | Phrases | **Origins** | Groups | Texts | Attachments

#	Country Code	Country Name
1	AO	Angola
2	AT	Austria
3	BS	Bahamas
4	DZ	Algeria
5		

Default Origin: Algeria

Copy From Another Item | Clear Origins

Country Code dropdown menu:

- XX - -No Country-
- AF - Afghanistan
- AL - Albania
- DZ - Algeria
- VI - American Virg.Island
- AD - Andorra
- AO - Angola
- AI - Anguilla
- AQ - Antarctica
- AG - Antigua/Barbuda
- AR - Argentina
- AM - Armenia
- AW - Aruba
- AU - Australia
- AT - Austria
- AZ - Azerbaijan
- BS - Bahamas
- BH - Bahrain
- BD - Bangladesh
- BB - Barbados
- BY - Belarus

You can choose one default country of origin and a number of alternative countries.

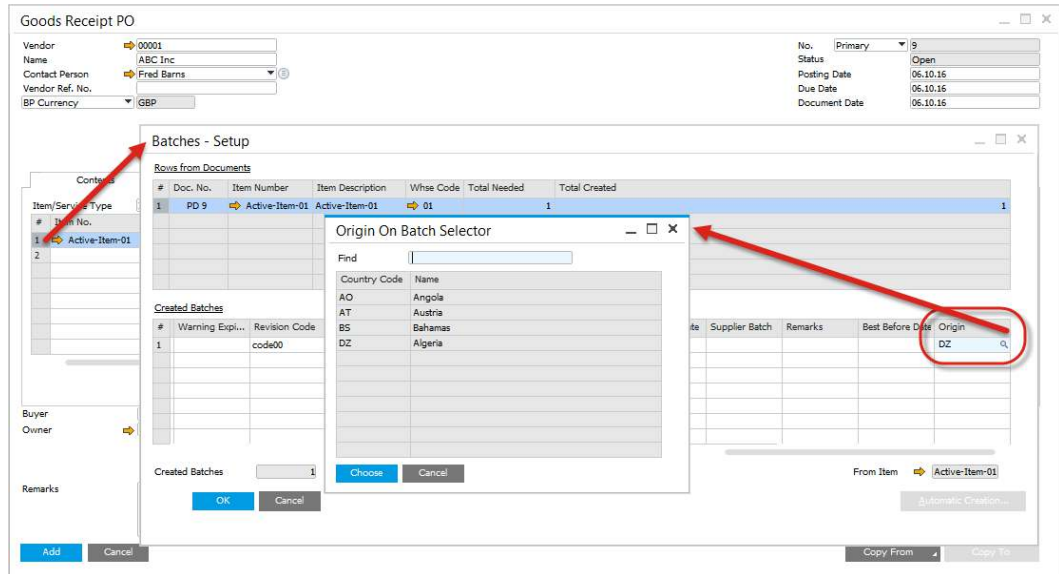
With two buttons you can either copy a set of assigned countries from another Item Details record or clear already in-putted on the tab data.

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2.21.2 Batch Creation

During the Goods Receipt PO process, the default Country of Origin is added to the batch/lot record, and if necessary can be overridden to one of the alternative origins.

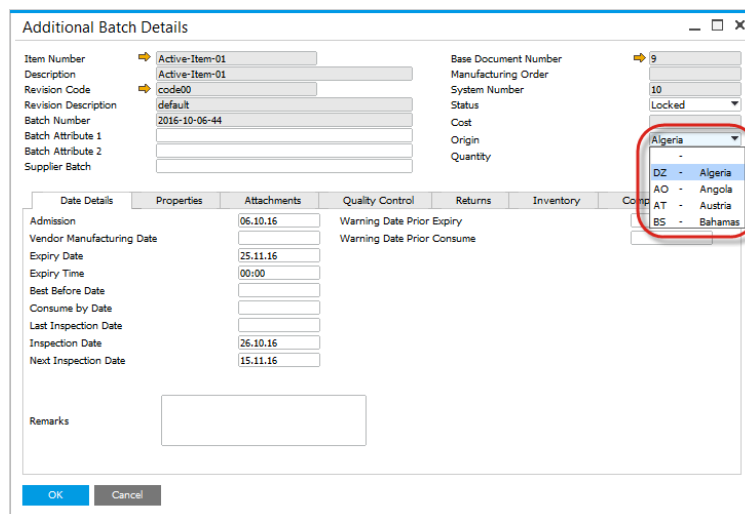
To do this, choose an Item line on Goods Receipt, right click and choose Generate Batches option.



When you choose an Item line, in Created Batches table go to Origin column. The value in it is default country chosen on Item Details form for the Item (check the previous section). On clicking magnifier symbol, a list of defined for the Item alternative countries is open. You can choose one of the values instead of the default one.

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2.21.3 Batch Record



The Origin is displayed on Additional Batch Details header. From here you can also change it to one of the alternatives defined in Item Details form.

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2.21.4 Batch Selection

When picking a Batch, Origin column is also displayed:

Batch Number Selection

Rows from Documents

#	Item No.	Item Description	Whse Code	Quantity	Total Needed	Total Selected	Total Batches	Direction
1	Active-Item-01	Active-Item-01	01	1	1	1		Out

Available Batches

Find:

#	C Action	QC Action Date	QC Status Date	Supplier Batch	Remarks	Best Before Date	Origin
1	one			12		21.07.16	
2	one						
3							
4							

Selected Batches

#	Batch	Selected Qty	System Number	Expiry Time	Base Entry	Base Type	Co...

Display Available Batches:

OK Cancel Auto Select

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