



yaveon

Yaveon 365 Lot Management

Software for
Batch Traceability

[Content]

01	Everything at a Glance.	04
02	How Does This Work Exactly? The Features.	05
03	Yaveon 365 Base	11

Microsoft
Partner

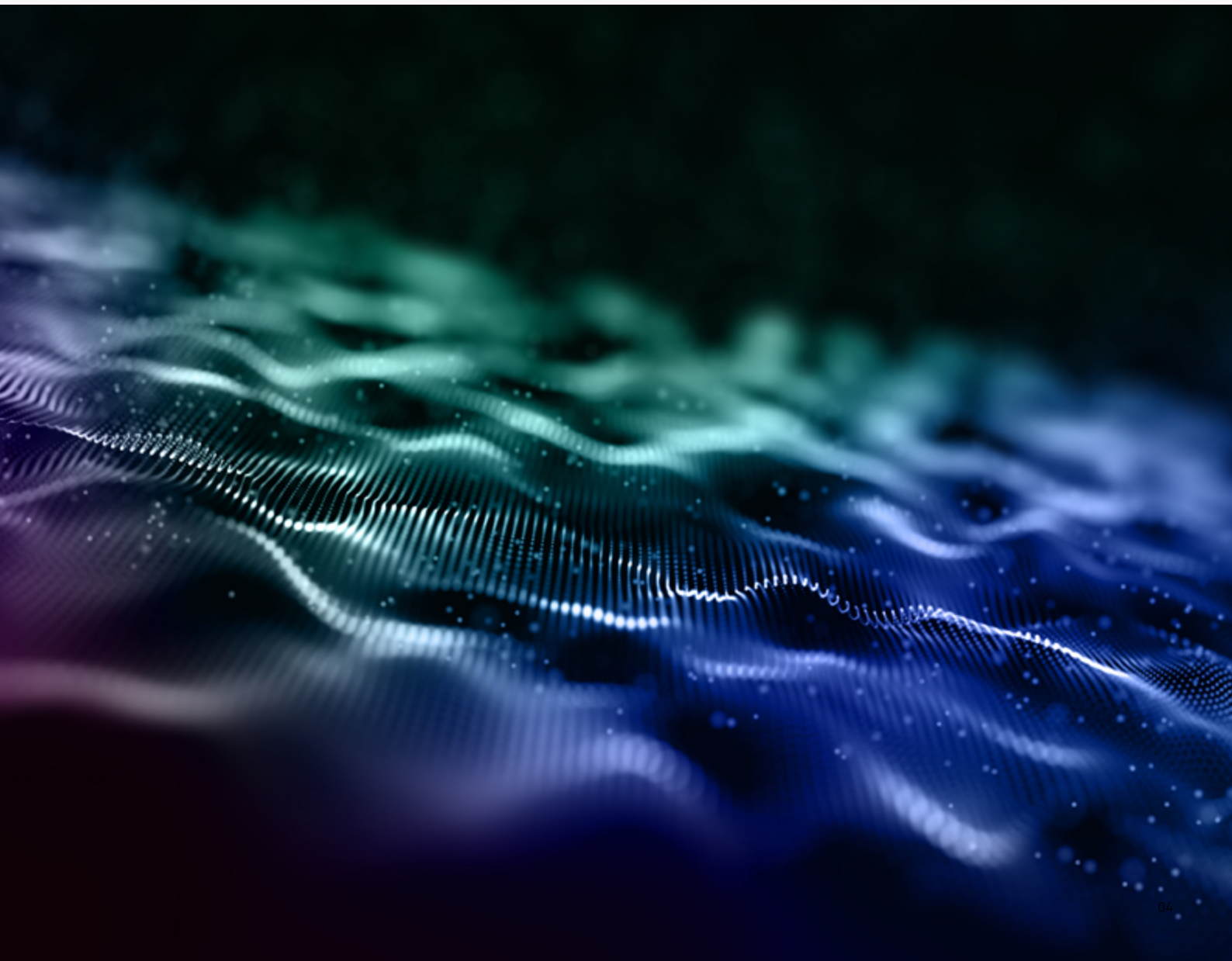
Everything at a Glance.

Product

- Product: ERP
- Basis: Microsoft Dynamics 365 Business Central
- Company size: Small and medium-sized companies
- Industries: Chemicals, pharmaceuticals, biotechnology, cosmetics, food, medical technology

The Three Most Important Advantages:

- 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.

General

Item Filter 1000082 ...

Variant Filter " ...

Lot No. Filter LOT000403 ...

Ext. Lot No. Filter

Serial No. Filter

Show Components Item-tracked Only ▾

Show Warehouse Mo... ☒

Trace Method Usage -> Origin ▾

Level of Detail High ▾

Max. Tracing Level 50

Explode Prod. Order S... ☐

Lines

⌵ Description	Serial No.	Lot No.	Ext... Lot Nu...	Item No.	Item Descrip...	Loc... Code	Bin C
✓ Sales Shipment Header SD100034		LOT000403		1000082	YAV! Erd...	MÜN...	WA-(
✓ Status: QC->FREIGEgeben, First Release ...		LOT000403		1000082	YAV! Erd...	MÜN...	WA-(

Item Tracing

Dynamics 365 Business Central

Lot No. Info Modification

LIM000015

Post...

General

No. LIM000015 ...

Item No. E1200001 ▾

Variant Code ▾

Item Description Ethanol

Lot No. LOT000007 ▾

Posting Date 06.09.2020

ID Filter

Reason Code ▾

Reason

Data

Base ID 0

Status QUARANTINE

Date of Entry 06.09.2020

Production Date

External Lot Number

Expiration Date 31.12.2024

Maximum No. of Expiration Date Ext... ..

Maximum Expiration Date

No. of Expiration Date Extensions

First Release Date

Last Release Date

New Base ID 0

New Status RELEASED ▾

New Date of Entry 06.09.2020

New Production Date

New External Lot Number

New Expiration Date 21.01.2025

New Maximum No. of Expiration Da... ..

New Maximum Expiration Date

New No. of Expiration Date Extensio... .. 1

New First Release Date

New Last Release Date

Electronic Signature ▾

Action Description

(There is nothing to show in this view)

Lot Info Modification

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.

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.

Dynamics 365 Business Central

POSTING RULES

Posting Rules

Im-/Export More options

General

AktionSales Shipment

RulesManage

Description	Priority ↑	Block Action	Exclude from planning	Active
→ Allow Sales Shipments of blocked Lots to Custom...	0	☐	☐	☒
Block Sale Shipments with Lot Status = Blocked	0	☒	☐	☒
Block Sales Shipments of expired Lots	0	☒	☐	☒
		☐	☐	☐

ConditionsManage

Condition	Field	Condition Filter
→ Lot	Status	BLOCKED
Sell-to Customer	No.	1000

Posting Rules

General

No. PHINV000007

Posting Date 15.03.2021

Description

Sorting Method Item

Location Code KÖLN

LinesManage

Item No.	Bin Code	Quantity calculated	Qty. Phys. Inventory	Quantity	Quantity (Base)	Unit of Measure Code	Rec...	User ID	Qty. per Unit of Measure
1000022	PROD_ZUG	1	1	0	0	KARTON	☒	YAVEON\PSE...	
1000022	PROD_ZUG	1	1	0	0	KARTON	☒	YAVEON\PSE...	
→ 1000022	PROD_ZUG	1	1	0	0	KARTON	☒	YAVEON\PSE...	
C1000001	S-02-0003	10	15	5	5	L	☒	YAVEON\PSE...	
C1000001	S-02-0003	10	8	-2	-2	L	☒	YAVEON\PSE...	
C1000001	S-07-0004	10	10	0	0	L	☐		
C1000002	S-04-0001	1.520	1.520	0	0	L	☐		
C1100001	S-02-0003	10	10	0	0	L	☐		
C1300001	MON_ABG	20	20	0	0	STCK	☐		

Inventory Order

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.



Item No. 2000

Description Ascorbic Acid

Lot No. LOT0014

Date of Entry 10.10.19

Expiration Date 27.03.21

Product Label

Yaveon 365 Base

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.

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.

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, HazMat Connect, 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 und HazMat Connect.

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.

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 ····· ☒Print Blanket Sales Or... · ☒

Logo alignment in do... · Right ▾

Length of Description · 0

Print Return Address ··· ☒Print Description 2 ····· ☒Print Footer ····· ☒Print Assembly Comp... · ☒

Footer height - maxi... · 0

Print Tracking Inform... · ☒Doc No. to Documen... ☒PB365 Extended Text... ☒

Corporate Design Setup

	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 Permission Sets Lines

Manage

	Assigned Role ID ↑		Restrict Permissions	Scope ↑
	D365 BASIC		☐	System
	D365 SALES DOC, EDIT		☐	System
	D365 SALES DOC, POST		☐	System

Permission Set Management



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