



# Access Right for Batch Number Creation and Selection

## Scenario:

This setting applies to users involved in stock Batch module and management processes. When a company purchases items with batch numbers, certain users are responsible for creating batch numbers provided by the supplier. In such cases, the system prompts these users with a pop-up screen to create the stock batch item during the Stock In process.

| Stock Code     | Description           | Batch |
|----------------|-----------------------|-------|
| Calcium Vit... | Calcium Vit D3 Vit K2 |       |

Conversely, other users may not need to create new batch numbers during the Stock In process because the batch numbers are already available in the system and are recurring. In this scenario, the system provides these users with a drop-down table, allowing them to select the appropriate batch number from a predefined list.

| Batch No     | Description  | Manufacturi... | Expiry Date | Balance |
|--------------|--------------|----------------|-------------|---------|
| 2024-12-2... | 2024-Dec-... | 01/04/2023     | 30/04/2025  | 1       |

This distinction ensures that users can efficiently manage batch-related tasks based on their specific roles and responsibilities within the stock management workflow.

## Solution

1. Maintenance > User Role > Select the user roles you would like to control

Security System Role - QNE Business Solutions

File Home Edit View Tools Inquiry Maintenance

User Roles Users My Details Projects Financial Period Valid Posting Periods Default Interface Accounts Currencies Terms Areas System Options Running Numbers User Default Form Format Posting Account Groups

Default Maintenance

Security System x

### Security System Role

Drag a column header here to group by that column

| Name          | Description  |
|---------------|--|
| Administrator |  |
| Default       | System predefined role with minimum required permissions |
| Manager       | Manager  |
| Purchase      | Purchase Department                                      |
| Sales         | Sales Department   |

## Allow Create Stock Batch Number

1. Permission > Other Operations > Tick **Allow Create Stock Batch Number**

Security System Role

Name\* Purchase  Administrative  Change New Password Every

Purchase Department

Description

Permissions Users Roles

Data Operations Other Operations Dashboard Transactions Reports Current Permissions

| Operation                                     | Allow                               |
|---|-------------------------------------|
| Access Web Application                        | <input checked="" type="checkbox"/> |
| Access Windows Application                    | <input checked="" type="checkbox"/> |
| Allow Create Stock Batch Number               | <input checked="" type="checkbox"/> |
| Allow Mark Documents as Bounced/Revert Cheque | <input checked="" type="checkbox"/> |
| Allow Mark Documents as Cancelled             | <input checked="" type="checkbox"/> |
| Allow Mark Documents as Closed                | <input checked="" type="checkbox"/> |
| Allow Mark Documents as PD Cheque             | <input checked="" type="checkbox"/> |
| Allow Mark Documents as Received              | <input checked="" type="checkbox"/> |
| Allow Select Stock (In) Batch Number          | <input checked="" type="checkbox"/> |
| Allow To Edit Transferred Document's Header   | <input checked="" type="checkbox"/> |
| Allow to Eject Cash Drawer in Cash Sales      | <input checked="" type="checkbox"/> |
| Customization Center                          | <input checked="" type="checkbox"/> |
| Customize Layout                              | <input checked="" type="checkbox"/> |
| Database Backup                               | <input checked="" type="checkbox"/> |
| Database Restore                              | <input checked="" type="checkbox"/> |
| Database Upgrade                              | <input checked="" type="checkbox"/> |

- In Purchase Module, when user select the Batch Item (Item Maintenance > Batched is ticked) > System will prompt the Batch 'Stock In' table for creating Batch No. & Description

- If user Untick Allow Create Stock Batch Number, means the user doesn't have access right to create the batch no,

| Operation                                     | Allow                               |
|---|-------------------------------------|
| Access Web Application                        | <input type="checkbox"/>            |
| Access Windows Application                    | <input checked="" type="checkbox"/> |
| Allow Create Stock Batch Number               | <input type="checkbox"/>            |
| Allow Mark Documents as Bounced/Revert Cheque | <input type="checkbox"/>            |
| Allow Mark Documents as Cancelled             | <input type="checkbox"/>            |

4. In Purchase Module, user can only select from existing batch number and cannot create new batch number. Batch 'Stock In' table will not pop up.

**Purchase Invoices**

Details | Supplier | Deliver To | Others | Notes | Files | Approvals | Info

Supplier: [Dropdown] Currency: RM Rate: 1.00000  
 From: [Dropdown] Attention: [Dropdown] Doc Date: 30/11/2021  
 Term: [Dropdown] Purchaser: John Invoice No.: BIL2111/024  
 Location: [Dropdown] Supplier DO No.: [Dropdown] Supplier Inv No.: [Dropdown]  
 Project: [Dropdown]  Tax Inclusive  Rounding

Scan Item... [Icons] View Variants

| Stock Code | Description | Batch No | F.Desc      | Qty            | UOM         | Unit Pr... | Disc | Amount | Tax C... | Tax |
|------------|-------------|----------|-------------|----------------|-------------|------------|------|--------|----------|-----|
| Aspirin    | Aspirin     |          |             | 1              | UNIT(S)     |            |      |        |          |     |
|            |             | Batch No | Description | Manufacturi... | Expiry Date | Balance    |      |        |          |     |
|            |             | AS 104   | Aspirin     | 01/08/2021     | 31/08/2022  | 15         |      |        |          |     |
|            |             | AS 103   | Aspirin     | 01/12/2020     | 31/12/2021  | 7          |      |        |          |     |
|            |             | AS 100   |             |                |             |            |      |        |          |     |
|            |             | AS 105   |             |                |             |            |      |        |          |     |
|            |             | AS 100   | Aspirin     | 01/10/2020     | 31/10/2021  |            |      |        |          |     |
|            |             | AS 101   | Aspirin     | 01/01/2020     | 31/12/2021  |            |      |        |          |     |
|            |             | AS 102   | Aspirin     | 01/11/2021     | 30/11/2022  |            |      |        |          |     |

Allow Select Stock (In) Batch Number

5. If the access right 'Allow Selct Stock (in) Batch Number' is **ticked**

Permissions | Users | Roles

Data Operations | Other Operations | Dashboard | Transactions | Reports | Current Permissions

View Variants

| Operation                                     | Allow                               |
|---|-------------------------------------|
| Access Web Application                        | <input type="checkbox"/>            |
| Access Windows Application                    | <input checked="" type="checkbox"/> |
| Allow Create Stock Batch Number               | <input type="checkbox"/>            |
| Allow Mark Documents as Bounced/Revert Cheque | <input type="checkbox"/>            |
| Allow Mark Documents as Cancelled             | <input type="checkbox"/>            |
| Allow Mark Documents as Closed                | <input type="checkbox"/>            |
| Allow Mark Documents as PD Cheque             | <input type="checkbox"/>            |
| Allow Mark Documents as Received              | <input type="checkbox"/>            |
| Allow Select Stock (In) Batch Number          | <input checked="" type="checkbox"/> |
| Allow To Edit Transferred Document's Header   | <input type="checkbox"/>            |

- In Purchase Module, after select the batch Item users can select the existing batch numbers from the drop-down table.

**Purchase Invoices**

Details | Supplier | Deliver To | Others | Notes | Files | Approvals | Info

Supplier: [Dropdown] Currency: RM Rate: 1.000000  
 From: [Dropdown] Attention: [Dropdown] Doc Date: 30/11/2021  
 Term: [Dropdown] Purchaser: John Invoice No.: BIL2111/024  
 Location: [Dropdown] Supplier DO No.: [Dropdown] Supplier Inv No.: [Dropdown]  
 Project: [Dropdown]  Tax Inclusive  Rounding

Scan Item... [Icons] View Variants

| Stock Code | Description | Batch No   | F.Desc      | Qty            | UOM         | Unit Pr... | Disc | Amount | Tax C... | Tax |
|------------|-------------|------------|-------------|----------------|-------------|------------|------|--------|----------|-----|
| Aspirin    | Aspirin     | [Dropdown] |             | 1              | UNIT(S)     |            |      |        |          |     |
|            |             | Batch No   | Description | Manufacturi... | Expiry Date | Balance    |      |        |          |     |
|            |             | AS 104     | Aspirin     | 01/08/2021     | 31/08/2022  | 15         |      |        |          |     |
|            |             | AS 103     | Aspirin     | 01/12/2020     | 31/12/2021  | 7          |      |        |          |     |
|            |             | AS 100     |             |                |             |            |      |        |          |     |
|            |             | AS 105     |             |                |             |            |      |        |          |     |
|            |             | AS 100     | Aspirin     | 01/10/2020     | 31/10/2021  |            |      |        |          |     |
|            |             | AS 101     | Aspirin     | 01/01/2020     | 31/12/2021  |            |      |        |          |     |
|            |             | AS 102     | Aspirin     | 01/11/2021     | 30/11/2022  |            |      |        |          |     |

- If user Untick Allow Select (In) Batch Number

Permissions | Users | Roles

Data Operations | Other Operations | Dashboard | Transactions | Reports | Current Permissions

View Variants

| Operation                                     | Allow                               |
|---|-------------------------------------|
| Access Web Application                        | <input type="checkbox"/>            |
| Access Windows Application                    | <input checked="" type="checkbox"/> |
| Allow Create Stock Batch Number               | <input checked="" type="checkbox"/> |
| Allow Mark Documents as Bounced/Revert Cheque | <input type="checkbox"/>            |
| Allow Mark Documents as Cancelled             | <input type="checkbox"/>            |
| Allow Mark Documents as Closed                | <input type="checkbox"/>            |
| Allow Mark Documents as PD Cheque             | <input type="checkbox"/>            |
| Allow Mark Documents as Received              | <input type="checkbox"/>            |
| Allow Select Stock (In) Batch Number          | <input type="checkbox"/>            |
| Allow To Edit Transferred Document's Header   | <input type="checkbox"/>            |

8. When users select an existing batch number,

**Purchase Invoices**

Details Supplier Deliver To Others Notes Files Approvals Info

Supplier: [Dropdown] Currency: RM Rate: 1.000000  
 From: [Dropdown] Attention: [Dropdown] Doc Date: 30/11/2021  
 Term: [Dropdown] Purchaser: John Invoice No.: BIL2111/024  
 Location: [Dropdown] Supplier DO No.: [Dropdown] Supplier Inv No.: [Dropdown]  
 Project: [Dropdown]  Tax Inclusive  Rounding

Scan Item... [Icons] View Variants

| Stock Code | Description | Batch No   | F.Desc      | Qty            | UOM         | Unit Pr... | Disc | Amount | Tax C... | Tax |
|------------|-------------|------------|-------------|----------------|-------------|------------|------|--------|----------|-----|
| Aspirin    | Aspirin     | [Dropdown] |             | 1              | UNIT(S)     |            |      |        |          |     |
|            |             | Batch No   | Description | Manufacturi... | Expiry Date | Balance    |      |        |          |     |
|            |             | AS 104     | Aspirin     | 01/08/2021     | 31/08/2022  | 15         |      |        |          |     |
|            |             | AS 103     | Aspirin     | 01/12/2020     | 31/12/2021  | 7          |      |        |          |     |
|            |             | AS 100     |             |                |             |            |      |        |          |     |
|            |             | AS 105     |             |                |             |            |      |        |          |     |
|            |             | AS 100     | Aspirin     | 01/10/2020     | 31/10/2021  |            |      |        |          |     |
|            |             | AS 101     | Aspirin     | 01/01/2020     | 31/12/2021  |            |      |        |          |     |
|            |             | AS 102     | Aspirin     | 01/11/2021     | 30/11/2022  |            |      |        |          |     |

system will prompt an error message

Scan Item... [Icons] View Variants

| Stock Code | Description | Batch No | F.Desc | Qty | UOM | Unit Pr... | Disc | Amount | Tax C... | Tax | Net |
|------------|-------------|----------|--------|-----|-----|------------|------|--------|----------|-----|-----|
| Aspirin    | Aspirin     | AS 100   |        |     |     |            |      |        |          |     |     |

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Permission to select stock batch number is required.

OK