



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.

The screenshot shows the 'Purchase Invoices' window with a 'Stock In' pop-up dialog. The 'Purchase Invoices' window has tabs for Details, Supplier, Deliver To, Shipping Info, Others, Notes, Files, Approvals, Info, and e-Invoice. The 'Supplier' tab is selected, showing details for Supplier 800-A001, From ALI MANUFACTURING SDN. BHD., Term 30 DAYS, Location, and Project. The 'Stock In' dialog has fields for Batch No*, Description, Manufacturing Date*, Expiry Date*, Reference 1, and Reference 2. The 'Batch No*' field is highlighted.

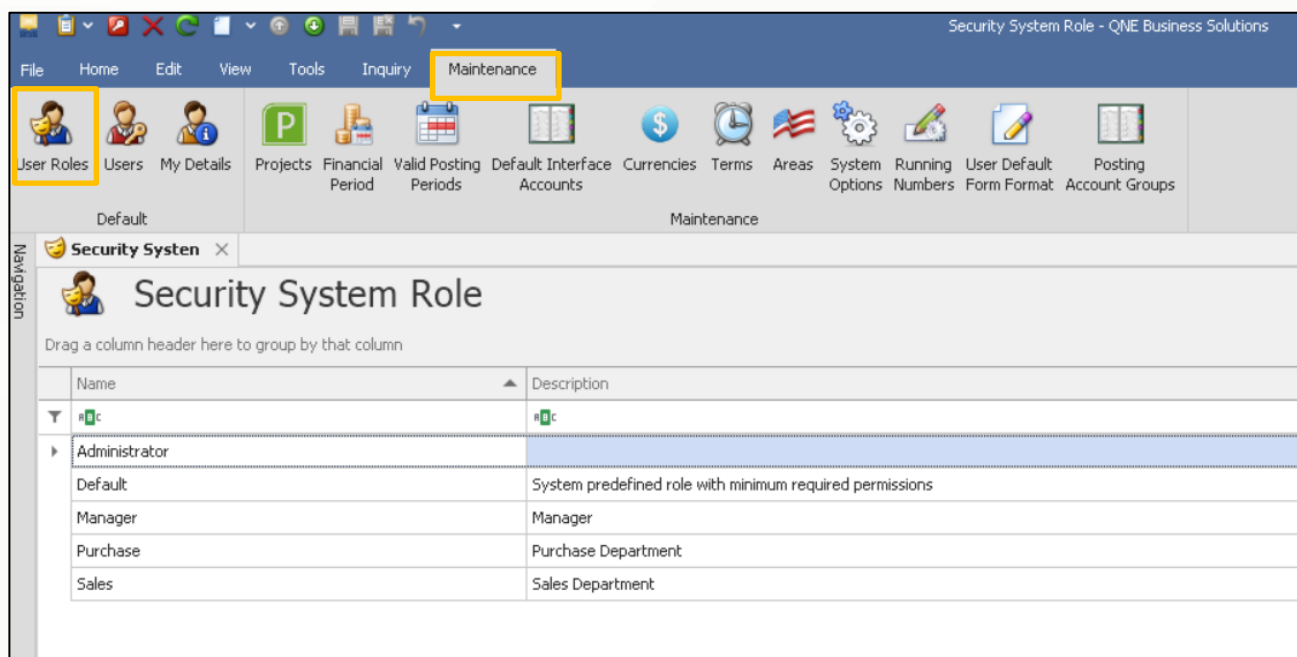
Conversely, other users may not need to create new batch numbers during the Stock In process because the batch numbers are already available in the system and are recurring. In this scenario, the system provides these users with a drop-down table, allowing them to select the appropriate batch number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

The screenshot shows the 'Purchase Invoices' window with a batch selection table. The 'Batch No' column is highlighted, showing a list of batch numbers. The table has columns for Batch No, Description, Manufacturi..., Expiry Date, and Balance. The first row shows Batch No 2024-12-2..., Description 2024-Dec..., Manufacturi... 01/04/2023, Expiry Date 30/04/2025, and Balance 1. The 'Purchase Invoices' window also shows details for Supplier 800-A001, From ALI MANUFACTURING SDN. BHD., Term 30 DAYS, Location, and Project. The 'Batch' tab is selected, showing a list of batches with columns for Stock Code, Description, and Batch. The first row shows Calcium Vit..., Calcium Vit D3 Vit K2, and Batch 1.

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

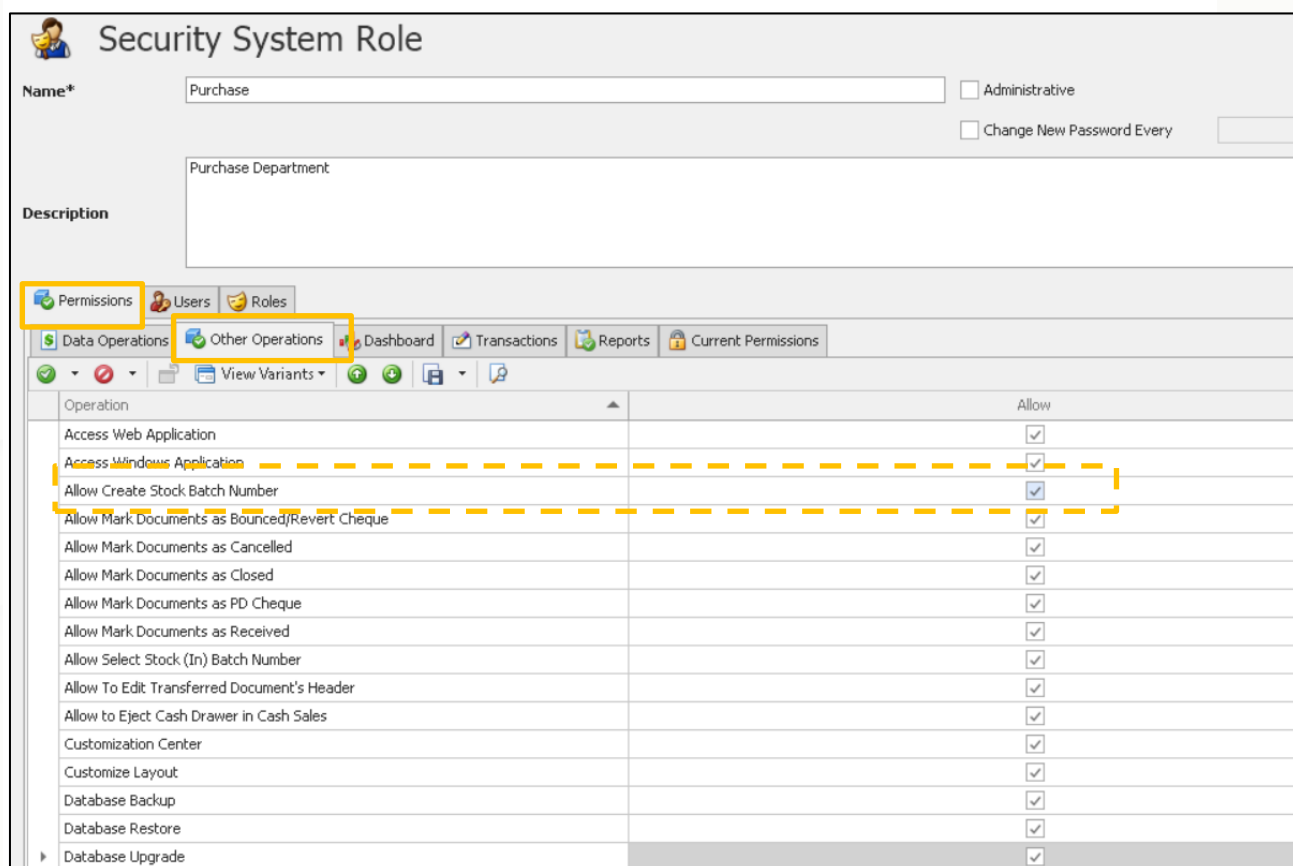
Solution

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



Allow Create Stock Batch Number

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



2. 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

3. 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: 1.000000
 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			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 [Icons]

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"/>

6. 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					

7. 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	Net
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									

QNE Business Solutions

Permission to select stock batch number is required.

OK