

Chapter 4.02: Production Batch Codes

Overview

The *Production Batch Codes* feature in Route Manager allows you to create and assign unique identification codes used to track batches of items for quality control and recall purposes. These codes can be used to establish traceability for any given item.

Batch codes are used in several industries relating to food:

- Ice
- Water
- Coffee
- Others

Whenever you need to know where any product you sell has gone, you should use Production Batch Codes.

They can be tracked to a truck or customer level – depending on how the system is configured.

Configuration

There are multiple configuration options and procedures that can be followed when using *Production Batch Codes*. Here are some common questions that should be answered prior to getting started:

1. *Will you assign Production Batch Codes as inventory is received in your warehouse?*

This is an optional feature that allows you to record *Production Batch Codes* within the *Inventory Adjustments* screen in Route Manager. Doing so gives you more complete traceability as it tracks the items from the moment they are received.

2. *Will you use invoice level batch code recording or simply handle all batch code recording during the Morning Load process?*

The *Production Batch Code* feature allows you to add and assign all batch codes during the *Morning Load* process and choose the appropriate code when the item is sold on an invoice. You have the ability to disable the invoice selection, or enable one or both of these methods.

3. *Will you allow multiple batch codes on per product on an invoice, or only one.*

When more than one unit of an item is sold, the system allows you to define whether or not they can enter multiple production batch codes, or only one.

Each topic is covered in further detail within this document.

The following list outlines the steps required to enable and begin using this function within Route Manager:

1. Enable the *Production Batch Code* option within each *Product Charge Code* that will require it.
2. Enable *Production Batch Code* related options within each *Handheld Class*.
3. Assign *Production Batch Codes* as items are received within the *Inventory Adjustments* screen (optional).
4. Select a *Production Batch Code* when a related item is sold while completing a sale.
5. Generate a *Production Batch Code Report* to view complete traceability for each group of items.

This document will guide you through each step of this process, allowing you to take full advantage of the *Production Batch Code* options within Route Manager.

Enable Production Batch Codes

It is important that each rack, pallet, case, etc. is clearly marked with a *Production Batch Code* when using this feature. This is required so that each person handling the item will be able to identify the code and enter it into the system properly.

NOTE: Further accuracy can be obtained by bar-coding labels on products so that they can be scanned. This will eliminate errors caused by either writing the code down improperly or entering it into the system incorrectly.

Product Charge Codes

To require a *Production Batch Code* for an item go to *Lists > Product Codes > Product Charge Codes* and select the 'Require Production Batch Code' option on the *Info* tab (shown below):

Product Charge Codes

100 10 Pound Bags Of Ice

Info | Pricing | Qty Pricing | Handheld | Accounting | Stock | History | Hazmat | Vendor | Internet

Charge Code	100	Units	Number of Gallons	1.00
HH Description	10 Pound Bags Of Ice to keep st		Volume/Unit	0.00
Statement Description	10 LB Ice		Net Product Weight/Unit	0.00
Mini Description			Gross Weight/Unit	0.00
Secondary Charge Code			Shipping Weight/Unit	0.00
Secondary Description				
Pre-Pay Product	<input type="checkbox"/>		Units per Package	0
Update Account Deposit	<input type="checkbox"/>		Product Unit Ref.	
Allow for Gratis	<input checked="" type="checkbox"/>			
Block Gratis On HH	<input type="checkbox"/>			
Require Production Batch Code	<input checked="" type="checkbox"/>			
Require Serial Number	<input type="checkbox"/>			
Coupon Redeemable Product	<input type="checkbox"/>			
Inactive Product	<input type="checkbox"/>			
Eligible for rent/refund	<input type="checkbox"/>			
Print as 'Extra Charge' on Invoice	<input type="checkbox"/>			
Non Inventory Item	<input type="checkbox"/>			
Count as Transaction	<input type="checkbox"/>			
Inactivity Cancellation	<input type="checkbox"/>			
Don't Include In Last 5 Deliveries	<input type="checkbox"/>			
Require Truck Compartment	<input type="checkbox"/>			
Use in Estimated Usage Calculation	<input type="checkbox"/>			

Suppress

Printing on Statements

Printing on Invoices

View on Account History

On EDI Output

Sub Product

Override Branch Qty Decimals Qty Decimals 0

Save your changes and repeat this step for each product that will require a *Production Batch Code*.

Handheld Class

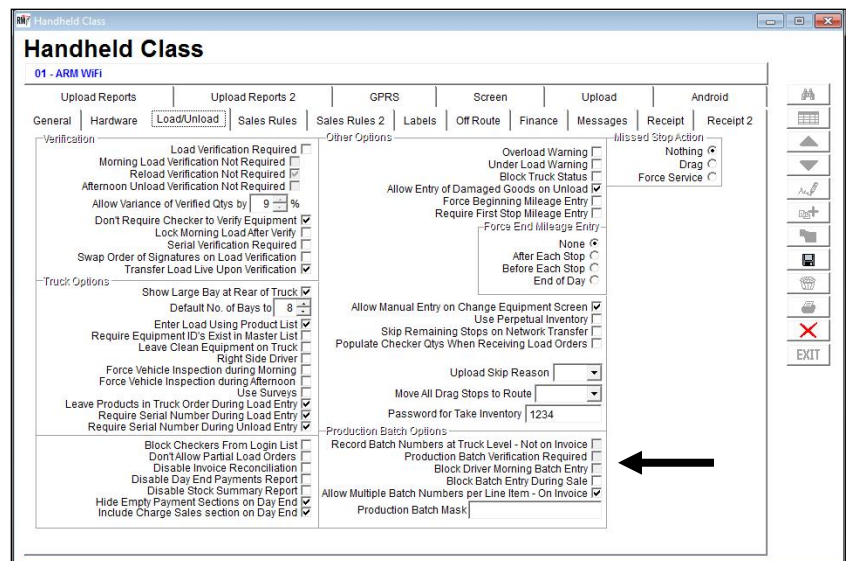
Each *Handheld Class* will need to be updated to utilize the available *Production Batch Code* features on the handheld. There are several options defined below that have a substantial impact on the process and how the system works.

NOTE: You should enable/disable *Production Batch Code* options per *Handheld Class* in Route Manager.

Additionally, customers that are not assigned to a route, or invoices created without an assigned route, will only be affected by the batch options selected within the default *Handheld Class 'ZZ'*.

Basic Setup

Navigate to *Lists > Routes > Handheld Class*, and select the *Load/Unload* tab. The *Production Batch Code* options are located on the bottom right portion of the screen, and a definition of each option is provided below:



Production Batch Options:

Record Batch Numbers at Truck Level – Not on Invoice:

Select this option to disable *Production Batch Code* entry or selection within the *Invoices and Adjustments* (Desktop) screen and the handheld *Invoice Entry* screen -- this forces you to only enter and select batch codes from within the *Morning Load* screen.

NOTE: Leaving this option unchecked allows you to enter or select batch codes within the *Morning Load* screen and the desktop and handheld invoice screens.

Production Batch Verification Required: Select this option to require that each *Production Batch Code* entered during the *Morning Load* process is verified by a checker.

NOTE: This feature requires enabling the *Load Verification Required* option within the *Handheld Class* screen.

Block Driver Morning Batch Entry: Select this option to disable *Production Batch Code* entry during the *Morning Load* process.

Block Batch Entry during Sale: Select this option to disable *Production Batch Code* entry from within the invoice screen during a transaction.

Allow Multiple Batch Numbers per Line Item: Select this option to allow more than one *Production Batch Code* to be selected per line item during a transaction.

NOTE: This is helpful when there is a large quantity of the same item assigned to different *Production Batch Codes*. You will be required to enter or select a batch code until all of the items have an applied code.

Production Batch Mask: Enter the format that should be followed when entering a new *Production Batch Code* (i.e., MMDDYY).

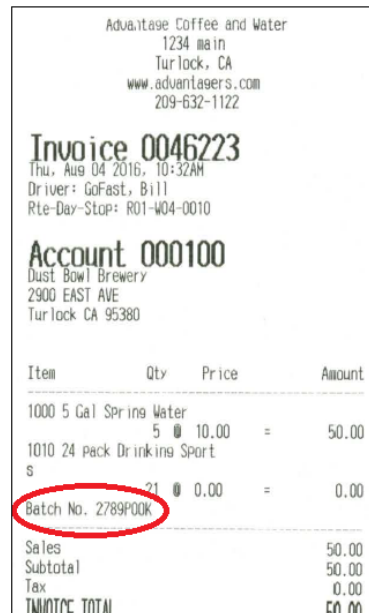
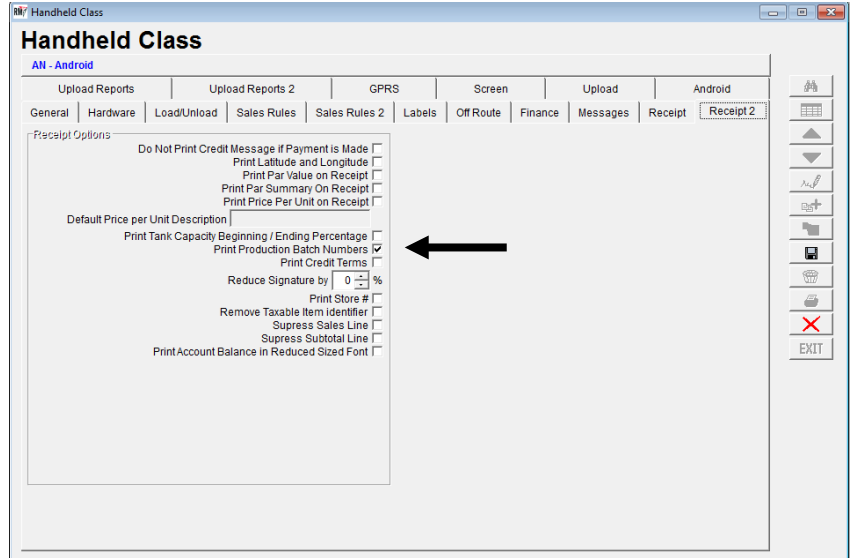
NOTE: Valid mask characters are as follows: M = numeric month; D = numeric day; Y = numeric year; 9 = numeric value; X = alpha character. For example: MM99X equals two digit month – two numeric values – one alpha character.

Printing Batch Codes on Your Receipt

If you would like to have the batch code print (or email) on the receipt to your customers, you can also set that up in the *Handheld Class*.

Follow these steps to do so:

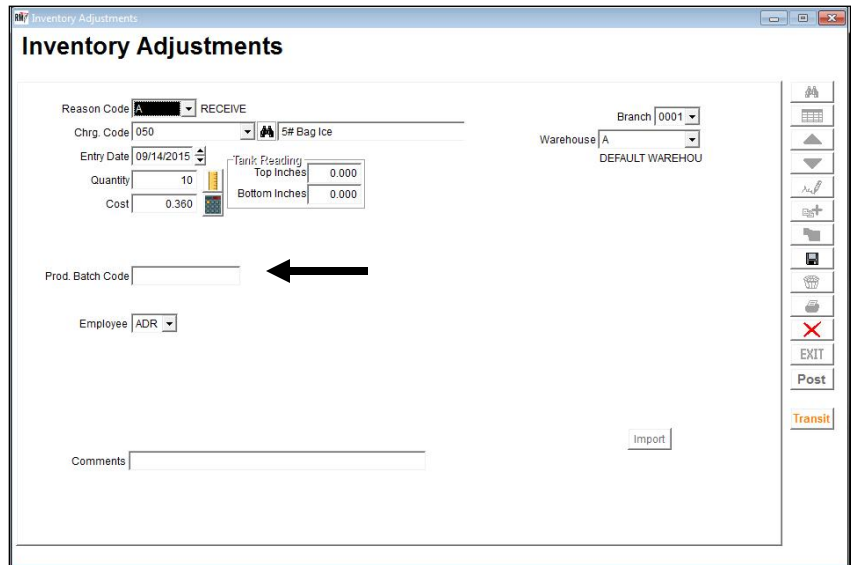
Navigate to *Lists > Routes > Handheld Class*, and select the *Receipt 2* tab. The *Print Production Batch Numbers* option is located on the left portion of the screen. Check this box to enable printing on the receipt.



Inventory Adjustments

The *Inventory Adjustments* screen includes a *Production Batch Code* entry field that can be used to assign batch codes to items as they are received in inventory.

While receiving items in Route Manager under *Modules > Inventory > Inventory Adjustments*, enter the *Production Batch Code* prior to saving and posting the entry (shown below).



The batch code and quantity will be included on the *Production Batch Report* covered in a later section of this document.

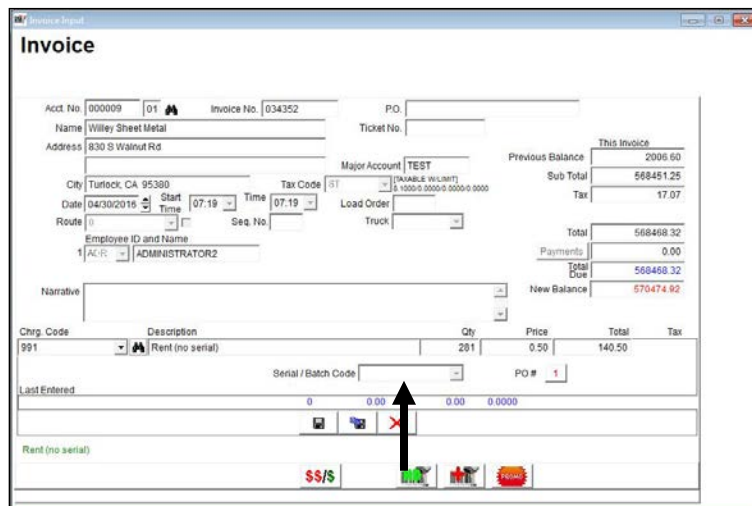
NOTE: The batch code information can also be included on the *Production Batch Report* for inventory transfers and damaged entries as long as you enter the code on the screen.

Invoices and Adjustments

The *Invoices and Adjustments* screen on the desktop includes *Production Batch Code* requirements per transaction when a related item is sold to the customer. Go to *Transactions > Invoice and Adjustments* and select *Add* or *Modify*.

NOTE: This feature is disabled if the option 'Record Batch Numbers on Truck Level – Not Invoice' is selected within the *Handheld Class* screen (discussed earlier).

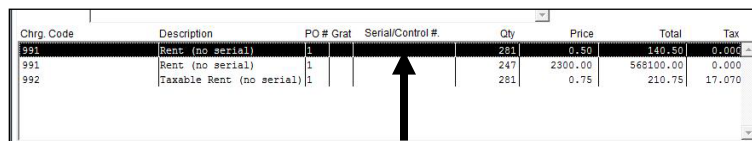
The batch code will be required per applicable item within the *Serial / Batch Code* field as it is added to the invoice (shown below):



The screenshot shows the 'Invoice' window with various fields for account information, customer details, and a line item table. The 'Serial / Batch Code' field in the line item table is highlighted with a black arrow.

Chrg. Code	Description	Qty	Price	Total	Tax
991	Rent (no serial)	281	0.50	140.50	

The saved batch code will be displayed per line item on the invoice:



Chrg. Code	Description	PO #	Grat	Serial/Control #	Qty	Price	Total	Tax
991	Rent (no serial)	1			281	0.50	140.50	0.008
991	Rent (no serial)	1			247	2300.00	568100.00	0.000
992	Taxable Rent (no serial)	1			281	0.75	210.75	17.070

Multi Batch per Line Item - Desktop

With the option 'Allow Multiple Batch Numbers per Line Item – On Invoice' enabled within the *Handheld Class* screen (discussed earlier), the invoice entry screen will display a 'Mfg. Batch No' button instead of simply entering a batch code:

Chrg. Code	Description	Qty	Price	Total	Tax	Serial / Batch Code	PO #	Grabs
098	NOAH 5 GALLON SPRI	20	7.45	149.00	0.0000	Mfg. Batch No.		Grabs <input type="checkbox"/>
Last Entered		0	0.00	0.00	0.0000			

Select the 'Mfg. Batch No' button and enter all of the batch codes and quantities needed until the *Allocated Quantity* matches the *Sold Quantity*. Enter the Batch No. in the appropriate field, and choose a quantity to apply to that Batch. Repeat as necessary for each Batch Number until all units are accounted for.

Batch Code Entry

098 - NOAH 5 GALLON SPRING

Sold Quantity Allocated Quantity

Batch No. Quantity

Batch No. Quantity

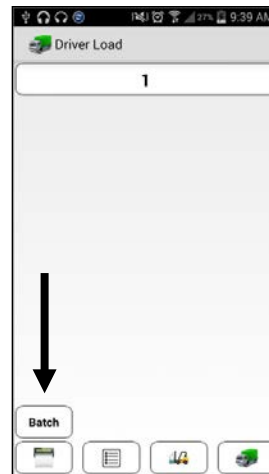
Save the batch code entry and continue with the transaction.

Handheld Usage

Each day your drivers will enter *Production Batch Codes* on the handheld to ensure traceability. There are a couple of areas within the handheld program where this can be accomplished.

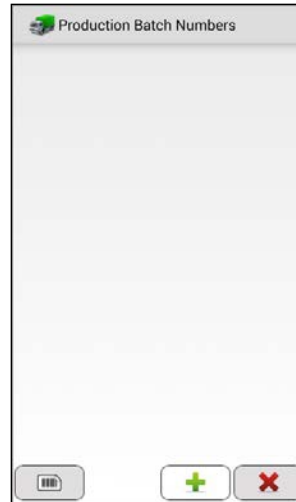
Morning Load

The primary location to enter batch codes can be accessed by clicking on the 'Prod. Batch Code' button within the *Morning Load* screen (shown below):



NOTE: The *Prod. Batch Code* button will be suppressed if 'Record Batch Numbers at Truck Level – Not on Invoice' is selected within the *Handheld Class* screen – in this case, the driver will be automatically prompted to enter the batch code when an applicable item is selected during the *Morning Load* process. Additionally, selecting the option 'Block Driver Morning Batch Entry' removes all batch code entry options from the *Morning Load* process.

The driver can key in all of the *Production Batch Codes* assigned to the items loaded for delivery that day:



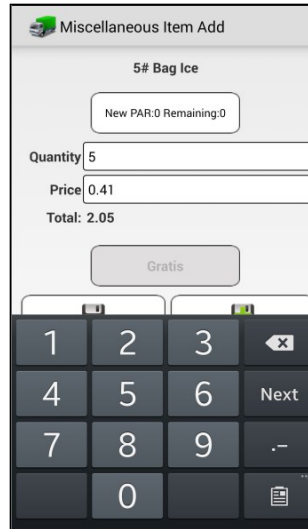
NOTE: If 'Production Batch Verification Required' is enabled within the *Handheld Class* screen (discussed earlier), then a *Checker* will be required to verify the added codes before the *Morning Load* can be completed.

Quick Entry Screen

The driver will be required to select the applicable *Production Batch Code* for Default Products as they attempt to save the invoice, prior to the Confirm Sale screen. Misc Items will be prompted after entering a quantity. Each step is outlined below:

NOTE: If the option 'Record Batch Numbers at Truck level – Not on Invoice' is selected within the *Handheld Class* screen, the driver will not be prompted for batch codes within the *Quick Entry* screen.

1. A batch code required item is selected on the handheld via *Misc Items*:



After keying in the quantity and choosing the arrow key, the 'Select Prod. Batch Code' screen will be displayed:



NOTE: For batch code items selected within the *Default Products* section, the screen above will be displayed after clicking the arrow key on the bottom of the *Quick Entry* screen.

2. Select the associated batch code and click the arrow key to continue.

NOTE: If the desired batch code is not displayed in the list, the driver can use the *Add* key on the screen to key it into the system as long as the option 'Block Batch Entry' is not selected.

During Sale' is not selected within the *Handheld Class* screen on the desktop.

3. The driver can simply repeat this process for each batch code required item assigned to the invoice.

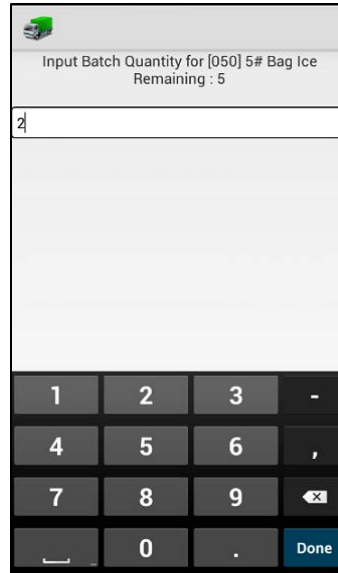
Multi Batch per Line Item - Handheld

With the option 'Allow Multiple Batch Numbers per Line Item – On Invoice' enabled within the *Handheld Class* screen (discussed earlier), the entry screen will display a modified version of the *Select Prod. Batch Code* screen that allows the driver to apply multiple batch codes to a single line item (shown below):



NOTE: If the desired batch code is not displayed in the list, the driver can use the *Add* key on the screen to key it into the system as long as the option 'Block Batch Entry During Sale' is not selected within the *Handheld Class* screen on the desktop.

The driver is required to enter a quantity that will apply to the current batch code after one has been selected:



Choose as many applicable batch codes needed until the *Remaining* quantity results in 0.

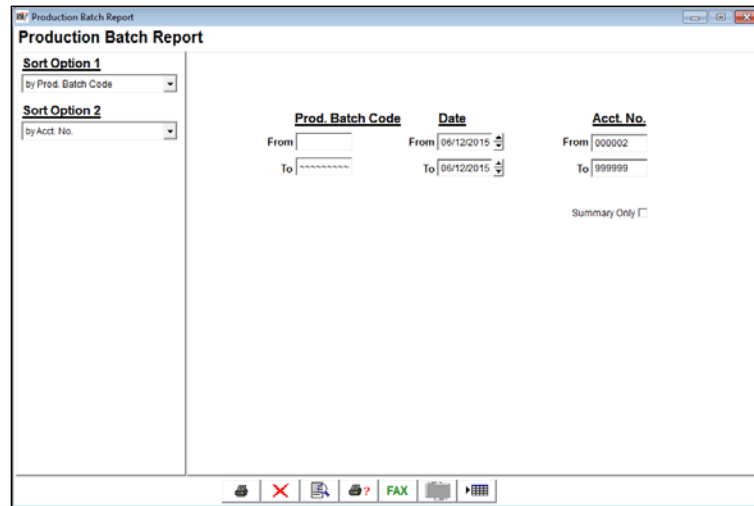


Click the arrow key and repeat this process for each batch code required item assigned to the invoice.

Production Batch Code Report

There is a single report created within Route Manager that will provide all of your *Production Batch Code* information. The report includes each batch code entered, along with the date and product sold. Additionally, the customer or route will be provided depending on the production batch settings enabled.

Navigate to *Reports > Management Reports*, and select the *Production Batch Report*.



Enter the desired criteria and preview or print the report. A standard report will look similar to the following:

Production Batch Report						
Account No. From 000100 To 999999						
Prod. Batch Code From To						
From: 02/13/2012 To: 02/15/2012						
Batch Code 02122012		Product	308	5 LB ICE		
Acct. No.	Name	Phone				Qty Sold
000100	Easy Mart 2	209-543-8945		02/15/2012		1
Batch Code 02122012/Product 308 Totals			Customer	1	Quantity	1
Batch Code 02132012		Product	308	5 LB ICE		
Acct. No.	Name	Phone				Qty Sold
000100	Easy Mart 2	209-543-8945		02/15/2012		5
100000	Robert Jordan	866-549-8837		02/13/2012		5
Batch Code 02132012/Product 308 Totals			Customer	2	Quantity	10

If the option 'Record Batch Numbers at Truck level – Not on Invoice' is selected within the *Handheld Class* screen, the account number criteria will be replaced with the driver's route identification code and description (shown below):

Production Batch Report						
Account No. From 000100 To 999999						
Prod. Batch Code From To						
From: 02/10/2012 To: 02/14/2012						
Batch Code 02102012		Product	308	5 LB ICE		
Acct. No.	Name	Phone				Qty Sold
A	North Stan County			02/10/2012		500
Batch Code 02102012/Product 308 Totals			Customer	1	Quantity	500

When entering batch codes within the *Inventory Adjustments* screen, the entry will resemble the following:

Production Batch Report					
Account No. F from 000100 To 999999					
Prod. Batch Code F from To ~~~~~					
From: 02/16/2012 To: 02/16/2012					
Warehouse MAIN - MAIN WAREHOUSE					
Batch Code 02162012		Product	309	5 LB Bag	
	Name	Phone			Qty Sold
MAIN	MAIN WAREHOUSE			02/16/2012	500
Batch Code 02162012/Product 309 Totals				Customer	1
				Quantity	500
Report Totals				Customer	1
				Quantity	500

Additionally, here is an example of the report as it would look with an inventory transfer that was completed within the *Inventory Adjustments* screen using the same batch code—'250' from the batch transferred to another warehouse:

Production Batch Report					
Account No. F from 000100 To 999999					
Prod. Batch Code F from To ~~~~~					
From: 02/16/2012 To: 02/16/2012					
Warehouse MAIN - MAIN WAREHOUSE					
Batch Code 02162012		Product	309	5 LB Bag	
	Name	Phone			Qty Sold
MAIN	MAIN WAREHOUSE			02/16/2012	-250
MAIN	MAIN WAREHOUSE			02/16/2012	500
MOD	Modesto Warehouse			02/16/2012	250
Batch Code 02162012/Product 309 Totals				Customer	3
				Quantity	500
Report Totals				Customer	3
				Quantity	500

Your report will include a combination of these report samples grouped by batch code depending on the enabled features.

Summary

The *Production Batch Code* features within Route Manager give you tracking and traceability options that you will find helpful to manage your products for effectively. Ensure that you learn how each available option works so that Route Manager can produce the desired results. If you have any questions regarding this feature, please contact a support technician to assist you.

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