

# BATCH NUMBERS AND EXPIRIES

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# BATCH AND EXPIRY SETUP

## Product Record

In the **Product record | More tab | Use Expiry** must be set to **Yes** or **Optional** for any item you wish to record batches for.

- **Yes** means a batch number and expiry MUST be recorded
- **Optional** means it's voluntary to enter the batch while receipting / selling.

## Setup Options

In **Options | Setup | Products | 1: Options** there are 6 Batch & Expiry options now with system wide scope.

<b>Auto Populate Batch Number</b>	If ticked, the last batch number dispensed will be automatically populated when dispensing a new drug while billing.
<b>Print Batch &amp; Expiry In Invoice</b>	If ticked, batch and expiry will print on Invoices
<b>Print Batch &amp; Expiry in Statements</b>	If ticked, batch and expiry will print on Statements
<b>Print Batch &amp; Expiry in Drug Labels</b>	If ticked, batch and expiry will print on Drug Labels
<b>Record Expiry Date for Each Batch</b>	Used when recording batch and expiry on reminder window at billing. If you batch and expiry must be recorded for all vaccines.
<b>Do not allow Batch Override</b>	If ticked, do not allow users to enter a new batch and expiry that is not already in the available list.

There is also an access level in **Options | Setup | Staff | 2: Access | Batch / Expiry Maintenance** so you can set which access levels are able to enter and maintain batches.

## RECEIPTING PRODUCTS

When receipting in an invoice from a supplier;

- If **Use Expiry** is set to **Yes** you must record all batch/expiry details before completing the creditor's invoice.
- If **Use Expiry** is set to **Optional** you can choose whether to update it or not.

To update the batches double clicking on the quantity to open the batch numbers input box. Continue to input batch numbers and quantities. You may use the barcode and Zebra DS4208 QR scanner to complete this.

Note: **Only for NVS** in the UK you can click on the download batches button at the bottom of the invoice to download the batch and expiry details.

V12 Open Purchase Invoice from Provet (# 1/11)

**Provet**

Staff: **OWN** Sup Inv Da:   
 To Pay: **\$0.00** Arr Date:   
 Sup Ref: Pmt Due D:

Verified	Ord#	Prd#	Description	Sup Cod	Store	Qty Arv	Bonus Arv	List (Excl.)	Buy (Excl.)	Pack Arv	Unit Sell	Total (Buy)	Sell (Incl.)	Bc Lbl	Authorised	Disc 1	Disc 2	Disc 3
▶	✓	1/4	1/1022	Revolution (selamectin)	Master	10	0.000	\$0.000	\$0.00000	1	\$5.000	\$0.000	\$5.000	N	✓	\$0.00	\$0.00	\$0.00

**Batch & Expiry**

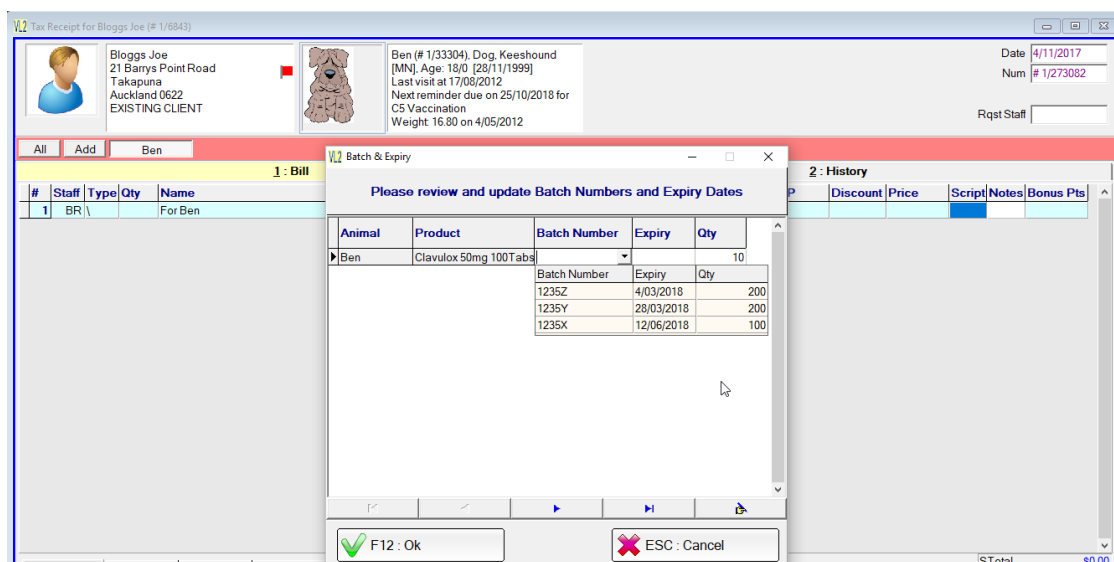
Please review and update Batch Numbers and Expiry Dates

Product	Batch Number	Expiry	Qty
▶ Revolution (selamectin)	4F14811	31/10/2017	5
Revolution (selamectin)	G571721	31/10/2015	5

## SELLING PRODUCTS

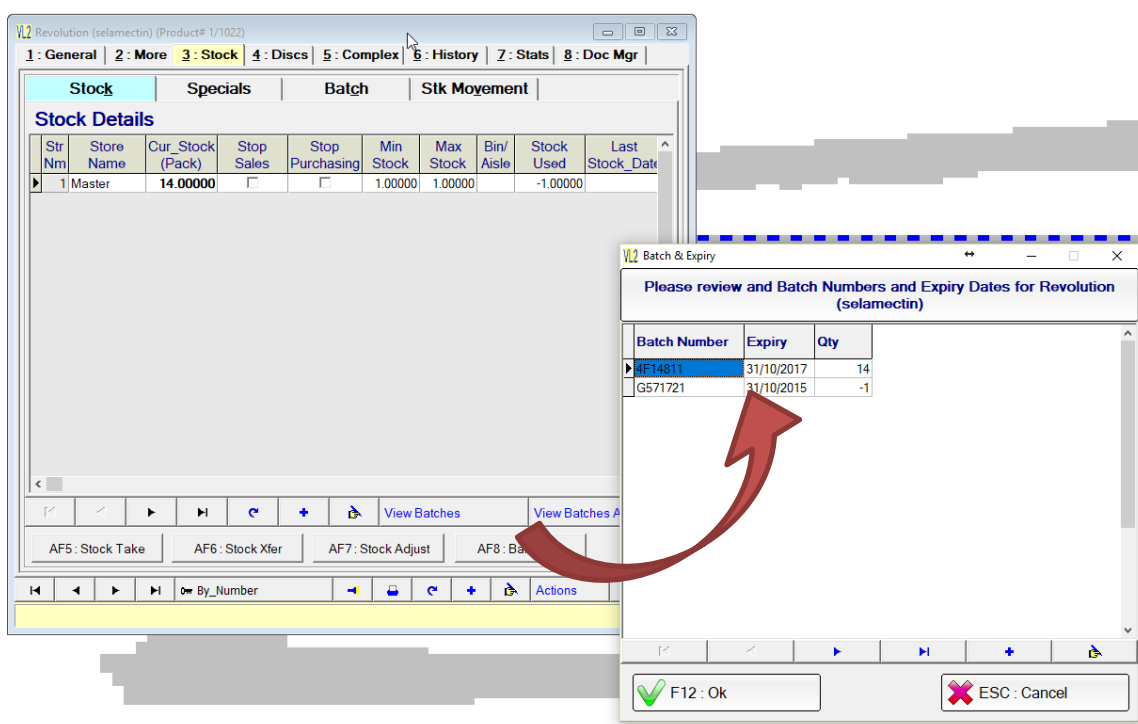
When selling a products if Use Expiry is set to Yes or Optional then a window will popup where the staff member can choose the batches to dispense. If you have a **Zebra DS4208** barcode scanner you will be able to scan the QR code on the package.

- if **Use Expiry** is set to **Yes** you must record all batch/expiry details before completing the bill.
- If **Use Expiry** is set to **Optional** you can choose whether to update batches or not.
- The ability for staff to enter unrecorded batches is controlled by the setup option under **Options | Setup | Product | 1: Options | Do not allow batch override**. If ticked they must select a batch from the list, if unticked they can enter a new batch/expiry.
- The **Zebra DS4208** barcode scanner is the only supported scanner for scanning batches. It can be used for scanning manufacturer barcodes at point of sale as well.
- If a batch is missed or exited in error, use **Action | Edit Batch Number & Expiry** to complete inputs before completing the sale.



## VIEWING BATCHES

In the Stock tab of the product record is a **View Batches** displays current stock levels by batch for the branch you are currently logged into. **View All Batches** shows the batches for all branches. These are read only fields.



# STOCK TRANSFERS WITH BATCHES

The stock transfer function in Vetlinkpro also has the functionality to transfer batches. Just start the stock transfer from [Creditors | Specials | Stock Transfers | Enter staff ID and reference details | select item and enter quantity | choose store to transfer to](#). Next choose the specific batches to transfer click on the **Batch** button and then choose the specific batches to transfer. Once batches are selected click **Post** to finish.

**Note:** The ability for staff to transfer unrecorded is controlled by the setup option under [Options | Setup | Product | 1: Options tab | Do not allow batch override](#). If ticked they must select a batch from the list, if unticked they can enter a new batch.

**Stock Transfer (041117)**

Staff:  Quantities are transferred in Packs

Existing Reference: 041117 New Reference:

#	Name	Qty (Pack)	From Store	To Store	Buy Price	Buy Size
1/3405	Clavulox 50mg 100Tabs	1.000	1	11	34.14	100

FROM: Product: Clavulox 50mg 100Tabs Store: Takapuna Qty (Pack): 1.000 Buy Size: 100 Buy Price: 34.14 SOH (Pack): 5

TO: Product: Clavulox 50mg 100Tabs Store: S11 Qty (Pack): 1.000 Buy Size: 100 Buy Price: 34.14 SOH (Pack): 0

Buttons: F7: Print, F8: Post, F9: Advanced

**Batch & Expiry**

Please review and update Batch Numbers and Expiry Dates

Product	Batch Number	Expiry	Qty
Clavulox 50mg 100Tabs			1
	Batch Number	Expiry	Qty
	1235Z	4/03/2018	2
	1235Y	28/03/2018	2
	1235X	12/06/2018	1

Buttons: F12: Ok, ESC: Cancel

## STOCK ADJUSTMENTS WITH BATCHES

Stock Adjust allows adjustment of stock levels including counts for each batch. To adjust a batch go to **Stock tab of product record | click stock adjust | enter your staff ID | enter the total SOH | click batches | enter count for each batch until it adds up to your total SOH**. You can either enter a new batch/expiry or edit an existing one.

**Stock Adjustment for Clavulox 50mg 100Tabs**

Staff: OWN  
Store: Takapuna  
Product: Clavulox 50mg 100Tabs  
SOH: 500  
Count: 600  
Variance: 100  
Reason:   
Print: ☐  
Buttons: F12: Accept, ESC: Cancel

**Batch & Expiry**

Please review and update Batch Numbers and Expiry Dates

Product	Batch Number	Expiry	Qty
Clavulox 50mg 100Tabs			600
	Batch Number	Expiry	Qty
	1235Z	4/03/2018	200
	1235Y	28/03/2018	200
	1235X	12/06/2018	100

Buttons: F12: Ok, ESC: Cancel

## STOCK TAKE WITH BATCHES

When generating a stocktake there are options to include/exclude batch & expiry based products.

When entering stock levels, enter the quantity then double click to allocate to individual batches. New batch codes may be added at this time also.

**Stock Take**

F12: Save and Exit  
Please enter stock in packs  
Columns exported to PDA cannot be edited

E	Prd_Name	Prd_Num	Buy_Size	Value	Cur_Stk	CoL_Total	Variance	CoL_01
	Revolution (selamectin)	# 1/1022	1	0	14	15	1	15

**Batch & Expiry**

Please review and update Batch Numbers and Expiry Dates

Product	Batch Number	Expiry	Qty
Revolution (selamectin)	4F14811	31/10/2017	10
Revolution (selamectin)	G571721	31/10/2015	5

Once all stock has been entered there is a **Validate** button to check that there is sufficient batches entered for each product. If batch numbers are missing an exclamation mark will appear next to that line item. You will need to update the batches for that line item before being able to post the sheet.

## STOCKTAKE / STOCK TRANSFER WITH STOCKLINK

StockLink is currently not updated for use with batches although this will be coming soon.