

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.

Revolution Cat (3 S) (Product# 179133)

1 : General 2 : More 3 : Stock 4 : Discs 5 : Complex 6 : History 7 : Stats 8 : Doc Mgr

Round Sell: On Product To 1

Buy GST: GST

Sell GST: GST

Caution:

Use Expiry: **Yes**

Category-3: Pfizer

Category-4: Default

Category-5: Default

Export To:

A : Mobile B : Web C : SFS

History:

Link to Diary Reason(s)

Apply price changes on Purchase Invoice entry

Setup Options

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

Auto Populate Batch Number	If ticked, the last batch number dispensed will be automatically populated when dispensing a new drug while billing.
Print Batch & Expiry In Invoice	If ticked, batch and expiry will print on Invoices
Print Batch & Expiry in Statements	If ticked, batch and expiry will print on Statements
Print Batch & Expiry in Drug Labels	If ticked, batch and expiry will print on Drug Labels
Record Expiry Date for Each Batch	Used when recording batch and expiry on reminder window at billing. If you batch and expiry must be recorded for all vaccines.
Do not allow Batch Override	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.

Open Purchase Invoice from Provet N Z Pty Ltd (# 1/227)

Provet N Z Pty Ltd
51 Ellison Road, Palmerston North

Staff: PE
To Pay: \$0.00
Sup Ref:

Sup Inv Date: 6/06/2023
Arv Date: 6/06/2023
Pmt Due Date: 6/06/2023

Inv Num: # 1/73063
Branch: Takapuna
Penalty:

* V A	Description	Order No	Item Code	Store	Qty	Bonus Q	Buy Siz	List (Excl)	Buy (Excl)	Unit Sell (li	Sell (Incl)	Total (Excl)	Total (li
> ✓ ✓	Revolution Cat (3's)		REVO C								\$51.84	\$25.250	\$29

Processing Batch & Expiry

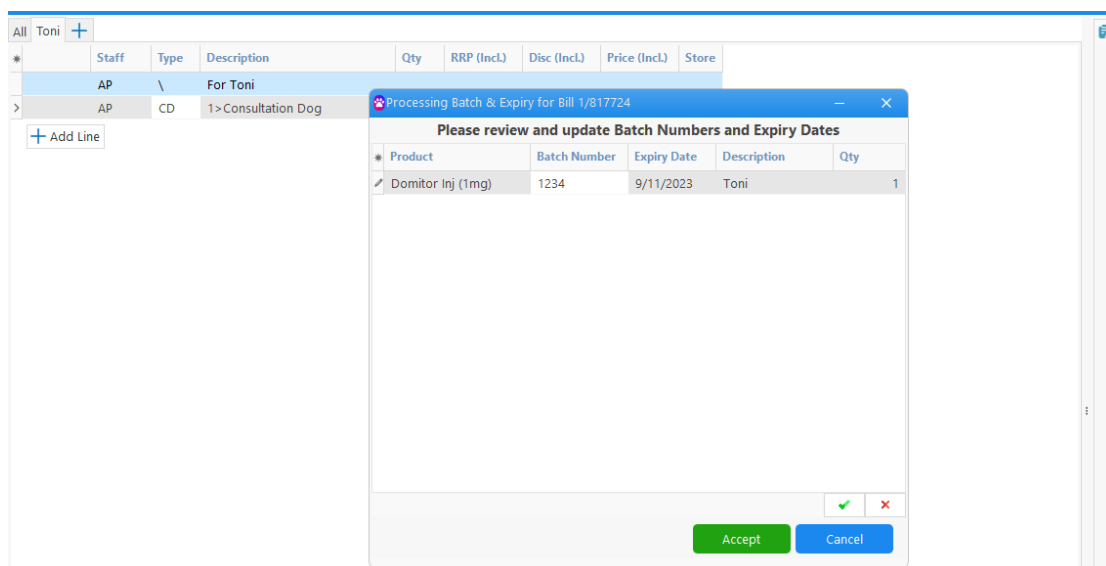
Please review and update Batch Numbers and Expiry Dates

* Product	Batch Number	Expiry Date	Qty
✓ Revolution Cat (3's)	123456	23/09/2023	1

SELLING PRODUCTS

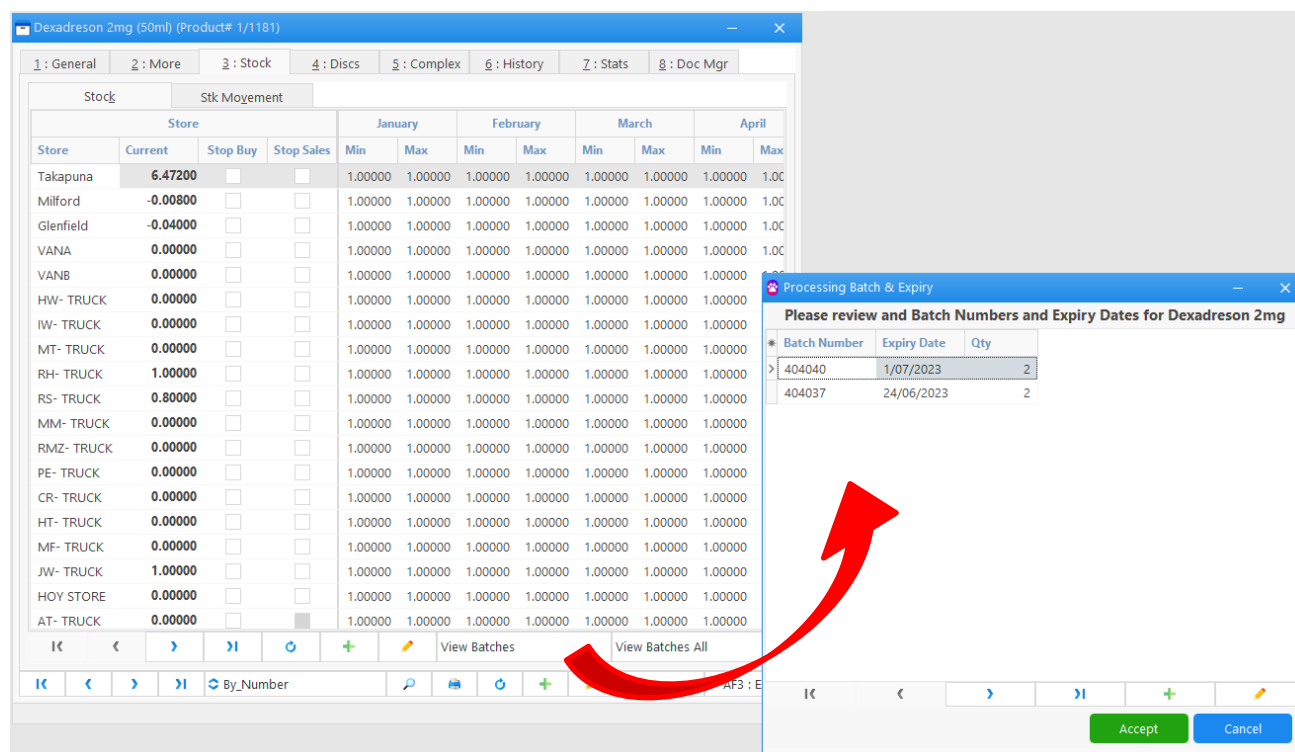
When selling a product, if 'Use Expiry' is set to Yes or Optional then a window will popup where the staff member can choose the batches to dispense. If you have a **Zebra DS4208** barcode scanner you will be able to scan the QR code on the package.

- 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. Stock transfers can be started from either:

1. In a product either go to:
 - a. [Menu | Stock | Stock Transfer](#)
 - b. OR in the ribbon, [Stock | Stock Transfer](#)
2. OR go to [Creditors | Specials | Stock Transfer](#)

Then [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 (TB)

Staff: AL Existing Reference: TB New Reference:

Quantities are transferred in Packs

Product Number	Product Name	Quantity (Unit)	Quantity (Pack)	From Store	To Store	Buy Price	Buy Size
> 1/1181	Dexadreson 2mg (50ml)	50.000	1.000	1	11	64.87	50

From: Product: Dexadreson 2mg (50ml) Store: Takapuna Qty (Pack): 1.000 Buy Size: 50 Buy Price: 64.87 SOH (Pack): 10.472

To: Product: Dexadreson 2mg (50ml) Store: RS- TRUCK Qty (Pack): 1.000 Buy Size: 50 SOH (Pack): 0.8

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

Processing Batch & Expiry

Please review and update Batch Numbers and Expiry Dates

Product	Batch Number	Expiry Date	Qty
> Dexadreson 2mg (50ml)			1
	Batch Number	Expiry	Qty
	404037	24/06/202	2
	404040	1/07/2023	2

Buttons: Accept, Cancel

STOCK ADJUSTMENTS WITH BATCHES

Stock Adjust allows adjustment of stock levels including counts for each batch. To adjust a batch, go to the product record and then either **Menu | Stock | Stock Adjust**, OR in the ribbon, **Stock | Stock Adjust** then **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 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 enter to allocate to individual batches. New batch codes may be added at this time also.

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.