Lotted Parts Overview
Reference Guide
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Overview and Summary

A "lot number" is a value stamped by the manufacturer on a box containing a number of parts or on the part itself. The box or part may also show a manufactured date, an expiration date, none or both. A lot number is very similar to a serial number except that there will be multiple parts with the same lot number. The master part number is flagged as either requiring lot numbers or forbidding them. (This is different from serial numbers, where a part can have them optionally.)

A serial number can also have manufactured and expiration dates. These are optional.

When a lotted part is received, the frame asks (in a pop-up) for the lot number and the received quantity. If the same part is received during the same transaction with different lot numbers, the two (or more) lots are entered on separate lines. If the lot has been received before, the two optional dates are already known and cannot be changed. If the lot is new for the part, the two optional dates are asked for.

When a serialized part is received, a pop-up already asks for the serial number and other optional information. A manufactured date and expiration date may also be entered. These are optional and must be entered for each instance of a serialized part. (That is, there are not default dates or dates carried from line to line).

When a lotted part is issued to a unit, work order, department or account, the user is asked for the lot to issue and is presented with a popup much like the serial number popup. Multiple lots cannot be issued on the same line; the user must have a separate line for each lot. It displays the lots on hand and dates associated with the lot and will ask for the quantity of each lot to issue. Issues of serialized parts will remain unchanged.

The printed work order displays the lot and dates for issued parts.

When a lotted part is returned to the location, the lot number is indicated on the return frame.

When a lotted part is transferred, the user is asked for the lot to transfer to and is presented with the same pop-up used to issue them. Multiple lots cannot be transferred on the same line. The lot number (and dates) appear on the pick ticket.

Required Setup

System Flag 5224 - Enable lotted part logic? (Y/N), must be set to Y.

Inventory Adjustment reasons need to be reviewed to accommodate why the lotted part is being disposed.

Creating a Lotted Part

A newly created part must have a part manufacturer associated with it. The reason is that the same part might use the same lot numbers made by different manufacturers.

Part Main Catalog

There is a flag, Lotted Part, that must be set to "Yes" in order for M5 to prompt for expiration date and lot number. The part must also be a stock part.

Receiving Lotted Parts - Manual PO

As soon as the part number is entered on Part Receive, a content 2 window displays. If the part you are receiving has more than one lot number, then you must receive that part again on a new line for the next lot number. Notice the lot # of each lotted part received displays near the end of the row.

Returning Lotted Parts

If anything about the received lotted part is mistyped (for example, wrong lot number, expiration date or manufacturers date), the part must be returned and received.

Part Journal Query

In order to see the lot number, double-click on the row of the part in question to view the Part Transaction Detail content 2 window.

Issuing Lotted Parts

Regardless, of what you are issuing the part to (WO, department, indirect account), M5 will ask for the lot number as soon as the part is entered.

Part Issue on Work Order Main

As soon as the part number is entered on the Part tab, the Lot No Entry content 2 window will display requiring the user to enter the lot number.

Transferring Lotted Parts

As with the other frames, when a lotted part is being moved, the lot number associated with that part must be entered. On the Part Transfer frame, the lot number field is on the same row as the part (far right). If transferring from different lot numbers, then each lot numbered part must be on a separate row.

Receiving a Transferred Lotted Part

You will receive the part like you would normally and notice you cannot change the lot number when receiving the transferred lotted part.

Adjusting Inventory

As with most of the other transactions, as soon as a quantity is entered, the Lot Number Entry content 2 window pops-up. The user can enter a new Lot #, Mfg Date and Expiration Date as needed. If an existing Lot number is entered, then the Mfg Date and Expiration Date is automatically displayed.

Disposing of Lotted Parts

If a lotted part has expired, then M5 allows for the disposal of that part. This can be done either on Department Main or Unit Main, depending on how the part was issued. Select the Part Disposal hyperlink to take you to the Part Disposal frame where you will see the lotted part issued and can dispose of it.

Part Merge

Parts cannot be merged together if one is lotted and one is not. If the two parts are lotted and have the same lot number, then the newly merged parts lot will use the earlier of both the manufactured date and expiration date.

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.