Bin to Serial Linkage

SYSPRO 8

Reference Guide

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CONTENTS

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Exploring

Where does it fit in?

With an ever-increased focus on warehouse management, the improved bin to serial linkage feature in *SYSPRO 8* enables you to accurately determine where serials reside in a warehouse from the perspective of bins.

Not being able to link serials to bins in previous versions of the product created problems in the stock allocation, depletion, balancing and stock take procedures. The improved linkage now provides efficient traceability of stock serial tracking across warehousing functions.

You can now find and use serials in a more timely manner, as any stock movement can be traced at bin level for serialized stock codes.

Also, when receipting, issuing or selling serialized items, you can now view the specific bin location of the serial.

Benefits:

- Improve Traceability:

  An improved method of tracking serials linked to bins provides for better visibility into serialized stock items in specific warehouses.

Starting

Prerequisites

- You require a valid license for the *Inventory Control* module.

Restrictions and Limits

- If inventory is shared between companies, then this feature can only be run in the company holding the inventory. All companies sharing the inventory will then be updated.

- Serials that cannot be converted to include the bin will result in the associated sales order lines (for the serialized item) being placed on back order.

- Business objects now have mandatory elements.

  For example: The new `<SerialBin>` element forms part of the business object in situations where multiple bins are allowed and will take the place of the existing bin elements when an item is serialized.

Setup Options

Setup Options > Configuration > Distribution > Inventory

Serial tracking system required

This records serial number information when processing transactions for serialized stock items. Once selected, you can only deselect this option when no active orders exist for any serialized item and there is no allocated quantities of serialized items.

Multiple bins

This requires entry of bins upon the receipt, issue or transfer of items and when capturing stock take information. The **Purge and Archive** program runs to ensure the default bin is inserted into existing lot records and their associated transactions against your traceable or ECC-controlled items. Run the **Balance** function of the **Order Purge** and **Inventory Period End** programs to ensure there are no quantities in ship without bin allocations and to transfer any qty on hand to the default bin.

Associate serials by bin

This is only available if multiple bins is enabled and the serial tracking system is required. You typically use this to track serialized items by bin location.

Once activated, you won't be able to switch off multiple bins at company level, or switch off the **Associate serials by bin** option. A conversion process migrates your lot/bin/serial tables, which cannot be reversed. If you need the system to function as before, you'll need to switch off multiple bins at warehouse level.

Setup Options > Preferences > Manufacturing > Work in Progress

Reserve serials for allocations

This lets you choose whether you want to reserve serials for material allocations when confirming a job. If **No**, then serial numbers are captured only when the materials are issued to the job. If **Yes** then the **WIP Reserve Lots & Serials Maintenance** program is loaded for each serialized component when the job is confirmed. If **Prompt operator**, then the operator is prompted once only to reserve serials for material allocations upon job confirmation.

Setup Options > Company > Options

Shared companies

These options let you share inventories across companies with different currencies and general ledgers across companies with differing accounting periods.

Solving

How does SYSPRO handle a shared inventory when using the bin to serial linkage functionality?

- If inventory is shared between companies, then this feature can only be run in the company holding the inventory. All companies sharing the inventory will then be updated.

What happens to serial numbers that can't be converted to include the bin?

These serials will result in the associated sales order lines (for the serialized item) being placed on back order.

- If the **Reserve serials for allocations** setup option is enabled (*Setup Options > Preferences > Manufacturing > Work in Progress*) these record types will be released in the scenario where the bin cannot be determined.

- After the sales orders are placed on back order, there will be one final attempt to convert a serial automatically, if the serialized item is also lot traceable. This will be done if only one bin is used for the lot associated with the serial.

- If a serial cannot be converted it will be placed on hold, with the hold reason being `Serial by bin migration`.

Using

How to configure the Bin to serial linkage

Before enabling the feature, ensure that the following is adhered to:

- No active stock take is in progress.

- All sales orders are complete (or at least as many as possible) as there may be some serials which cannot be converted to include a bin location.

- All credit notes/debit notes are invoiced or canceled (if they contain serialized items).

- All kit items in ship are manually moved to back order or invoiced (if they contain serialized items).

- No sales orders are in a status of `0 - In process` (if they contain serialized items).

- No active sales orders with serialized items (in ship or reserve) are on hold.

1. Enable the **Associate serials by bin** setup option (*Setup Options > Configuration > Distribution > Inventory*).

    Once you have enabled the feature, the system will run an automatic conversion.

    Follow the prompts of the conversion wizard.

    > Once you have enabled the **Associate serials by bin** setup option, you cannot disable it again.

2. During the last step of the conversion, capture any serials that are on hold.

    The conversion wizard will confirm once the process is complete and if any errors occurred.

    > When enabling serials by bin, SYSPRO automatically converts all serials to include the bin location. However, this occurs if only one bin exists (and is in use) for the stock code and warehouse combination.

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