

PROGRESSION'S VERSION 7.6 SERIAL/LOT CAPABILITIES ARE POWERFUL FEATURES THAT HELP YOUR ORGANIZATION MANAGE INVENTORY QUALITY AND TRACKING THROUGH PROCUREMENT, DISTRIBUTION, MANUFACTURING, AND CUSTOMER SERVICE.

**Visual Trace Final Disposition**

**Customers**

000000000100
000000000200
000000000300

**Customer Name/Address**

Name: 21ST Century Enterprises

Address: PO Box 4545  
670 Manson St.  
San Francisco, CA 95782

Contact: Herbert Mandel

Phone: 415-673-7844

**Order Detail**

Ord#: 00000060

Item: PARENT SER Inv#: 3737

Ser: 961210500000136	Date: 12/29/1997	Qty: 1.0000
Ser: 961210500000137	Date: 12/29/1997	Qty: 1.0000
Ser: 961210500000138	Date: 12/29/1997	Qty: 1.0000
Ser: 961210500000139	Date: 12/29/1997	Qty: 1.0000
Ser: 961210500000140	Date: 12/29/1997	Qty: 1.0000

Buttons: Mail Merge, Print, Close

*Within Progression, you may view a selected serial/lot item from source to final disposition using the Visual Trace Application*

Within Progression, serial/lot capability designates parts or batches as serialized or lotted. The unique identification of a part or batch permits a specific item or lot to be traced forward to your customer or backward to its vendor or the origin of production. In other words, serial/lot caters to the traceability requirements of your organization. For example, if a customer found that his computer did not work because of a malfunctioning chip, a Progression user could drill down on the computer's serial number to determine what lot of computer chips was used. The computer manufacturer could then eliminate the further use of that specific lot of computer chips in its manufacturing process.

### QUALITY TRACKING

Serial/Lot functionality provides an efficient way to trace specific serialized or lotted items. The ability to drill down on these items or batches helps to eliminate potential quality problems. When one item in a lot is found to be defective, others can be tested to ensure that standards of quality are upheld. This minimizes the cost of non-quality, since vendors who provide low quality products can be alerted to the problem or eliminated as a vendor, and poor manufacturing processes can be determined and corrected.

### ISSUE AND RECEIPT LOGIC

Rules-based issue and receipt logic exists for serial/lot and bin transactions, such as Earliest Expiration, FIFO (First In, First Out), and Priority. Serial/Lot issue and receipt rules allow the system to make recommendations to closely follow material movement logic. For example, Progression will use Earliest Expiration when dealing with the shipment of perishable produce. This reduces cost of obsolescence, minimizes waste, and lowers cost of goods.

### VISUAL TRACE

The Progression Serial/Lot Trace Application allows you to trace the source and the disposition of a selected serial/lot item. Progression displays this information visually from source to final disposition, in tree-like diagrams.

You may:

- Display one or both of the Source and Disposition windows
- Compress or expand the Source and Disposition trees or a single branch on either tree
- Begin a new trace with a serial/lot item that appears in the Source or the Disposition of the currently displayed serial/lot item
- Print the displayed source and/or disposition information on the Visual Serial/Lot Trace report
- View the final disposition information of the serial/lot item, print the Visual Serial/Lot Trace Final Disposition report, and/or create a mail merge file containing the customer contact information

### VIEWING AND REPORTING FUNCTIONS

Progression's Serial/Lot functionality allows you to view specific serial/lot information using several viewing functions. You can quickly display the transaction history, vendor history, and sales history for serial/lot tracked items. For a selected item, you can view information such as serial/lot effective date or expiration date, and transaction order number, date, cost, and quantity. You also are able to view several reports, including the Stock Status, Expiration, and History reports. These provide information such as item location, receipt date, item quantity information, customer number, warranty date, and allocation status.

### ADDITIONAL FEATURES

Progression helps to facilitate the processes required for FDA regulated industries and others requiring item traceability down to the serial or lot level, including the pharmaceutical, medical instrument, and machinery industries.

Some of the features include the ability to:

- Define separate serial and lot formats and numbering conventions
- Trace items upward and downward
- View manufacturer's serial/lot number
- Write unlimited notes at the serial and lot number level
- Use expiration dating
- Apply user-defined reason codes to put a serial or lot number on hold

Serial/Lot functionality provides many benefits. It ensures that parts and batches are uniquely identified. This enables an efficient process to track and drill down on specific items, and allows easy traceability forward to customer or backward to vendor or origin of production. Problem batches can easily be identified through vendor performance and manufacturing process analysis, allowing your business to deliver high quality products.

### MORE INFORMATION

For more information on how to put the power of Exact Software North America to work in your front office and mission critical back office, call today:

**800.468.0834**



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