



Summary

This page will show you how to add/remove batch-management from an item. This is generally used when a new item is created and the user forgets to mark the item as batch-managed, but it can also be used when your team decides to start or stop tracking batches for a specific item.

Step by Step Guide

NOTE: We always recommend going through this process in your TEST database before making these changes in your Live database to verify that the process works the way you expected.

1. Check your Open Items list for Open GRPOs containing the item you wish to update. All GRPOs for the item must be closed before the Batch setting can be changed.
2. Navigate to Inventory>Item Master Data and find the item that you would like to change
3. Open the Inventory Data tab and check the "In Stock" quantity
4. If the In Stock quantity is 0, you can switch to the General tab and change the "Manage Item by" field to the desired setting. No other steps are required. If the In Stock quantity is not 0, continue to step #5

The screenshot shows a software interface with four tabs: General, Purchasing Data, Sales Data, and Inventory Data. The 'Inventory Data' tab is selected. Below the tabs, there are several fields and checkboxes. A red circle highlights the 'Manage Item by' dropdown menu, which currently shows 'None'. Above this, there are checkboxes for 'Tax Liabe' (checked) and 'Do Not Apply Discount Groups' (unchecked). Below these are dropdown menus for 'Manufacturer', 'Additional Identifier', and 'Shipping Type'. The 'Serial and Batch Numbers' section is also visible, containing the 'Manage Item by' dropdown.

5. Navigate to Inventory>Inventory Transactions>Goods Issue



6. Enter the Item Code and the quantity in stock, then click "Add" to issue the item out of stock.
7. Bring the Goods Issue back up by clicking on the far-right green arrow at the top of your screen, and then right-click and choose "Journal Entry". Make a note of the Journal Entry total

8. Go back to Item Master Data and open the General tab, then change the "Manage Item by" field to the desired setting

9. Navigate to Inventory>Inventory Transactions>Goods Receipt
10. Enter the Item Code, the same quantity that was used on the Goods Issue, and the total from the Goods Issue Journal Entry in the "Total" field, then click "Add" to receive the item back into stock



11. If you are making the item batch-managed, you will need to create batches for the item at this time.

Steps #6 and #9 are very important because they will ensure that your Item Cost does not change between the Goods Issue and Goods Receipt. If the Total on the Goods Receipt does not match the Journal Entry for the Goods Issue, then your Item Cost will be incorrect.