



Summary

Sometimes when issuing an item into production, or selling an item, you will not have available batches for certain items. The item will be in-stock and the system will require you to select a batch number, but the list of batches will be blank

This usually happens when the item is set to be batch-managed "On Release Only". This setting allows you to bring an item into stock without assigning it a batch number, but does not allow you to remove it from stock without choosing a batch. This page will show you how to create batches for the items that need them.

Step-by-step guide:

1. Go to Inventory>Item Management>Batches>Batch Management



2. Change the Operation to "Complete"
3. Leave the Item No. fields blank, and make sure the Group is set to "All"
4. Check all of the boxes in each tab, Purchasing, Sales, and Inventory Posting



5. Leave the Dates blank

The dialog box is titled "Batch Management - Selection Criteria". It contains the following fields and controls:

- Operation: **Complete** (dropdown menu)
- Create batch numbers for received items: ☐
- Item No. From: To:
- Group: **All** (dropdown menu)
- Buttons: **Properties** (highlighted), **Ignore**
- Tabbed interface with three tabs: **Purchasing - A/P** (selected), **Sales - A/R**, and **Inventory Posting**.
- Under the **Purchasing - A/P** tab, there are three checked items: ☒ Goods Receipt PO, ☒ Goods Return, and ☒ A/P Invoices.
- Date From: To:
- Buttons at the bottom: **OK**, **Cancel**, and **Default Settings**.

6. Click "OK"

7. Create batches for all of the items that come up

The dialog box is titled "Batch Management - Complete". It displays the results of the batch creation process.

Rows from Documents

#	Doc. No.	Item Number	Item Description	Whse Code	Total Needed	Total Created
1	SI 10002	RH5012	Hops - Fuggle	A1	10	10

Created Batches

#	Batch	Qty	Batch Attribute 1	Batch Attribute 2	Expiration Date	Mfr Date	Admission Date
1	102214	10.000					10/22/2014

Created Batches: Created Qty:

Buttons: **Add** (highlighted), **Cancel**, and **Automatic Creation...**



8. Use the yellow arrow on each item to open the Item Master Data
9. Change the Batch Management to "On Every Transaction"

The screenshot shows the 'Item Master Data' window for item RH5012. The 'Management Method' dropdown is highlighted with a red circle and a red arrow pointing to it. The dropdown is currently set to 'On Every Transaction'. Other fields include Item No. (Manual), Description (Hops - Fuggle), Item Type (Items), Item Group (RM: Hops), UoM Group (Manual), Price List (Clust: CA), Bar Code, Unit Price, Primary Curri, and various checkboxes for Inventory Item, Sales Item, and Purchase Item. The 'Production Data' section includes Phantom Item and Issue Method (Manual). The 'Management Method' dropdown is highlighted with a red circle and a red arrow pointing to it.

10. After changing the Management Method on all of the items, click "Add" on the Batch Number Completion screen to save the new batches

This will allow you to assign batch numbers to all batch-managed items in your system that do not currently have them, and will prevent this issue from coming up with those items again. It's also a good idea to check your other items to make sure they are all set to "On Every Transaction" to prevent this from happening again in the future.