Customer-Centric Lot Processing Via Advanced Preference 23: Advanced Lots – Ship Ascending

By Susan Stooksberry

Editor's Note: What happens when you put Lot Processing and Advanced Preferences together? You get some great functionality that allows you to better serve your customers, especially those with stringent requirements when it comes to expiration dates. Susan Stooksberry details the features of this combo, including user-defined dates in the Lot Master, and inventory commitment by Customer Group. She also clues us in on some important gotchas you'll want to heed when using this powerful duo.

Introduction

It looks as though the JD Edwards® *Lot Processing* and *Advanced Preferences* have been working out together at the gym. As of Release 8.10, they are a flexible and powerful team. Advanced Preferences exist for Sales Order Management and for Demand Scheduling. In Jane Perry's JDEtips article "*Advanced Preferences in 8.10*" (May/June 2006 issue, Distribution/Sales Order Management category), we learned how each of the 18 Sales Order Management advanced preferences work. In this article, we will show that lot processing has much to offer these days, especially when a user combines it with a specific advanced preference (Advanced Lots – Ship Ascending). We will discuss some of the nifty new features, and show you how to set up customer-centric Lot Processing (who knew?). We'll also cover some of the glitches you may encounter.

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Lots of User-Defined Dates in the Lot Master - When lot-controlled items are received, adjusted in, or completed into inventory, the system can populate a number of user-defined dates in the lot master with values calculated from setups in the Item Branch/Plant. The date calculations are based on on-hand date, shelf-life days, and numbers of days (positive or negative) set up for each date field.

Inventory Commitment by Customer Group - When lot-controlled inventory is selected by the Print Pick Slips program, the system can hard-commit lots to sales orders based on the following methodologies:

Item-Centric Methodology – For each lot-controlled item, you can select one date bucket from a list of eight lot dates for committing inventory to sales orders. This is done by selecting the Commitment Date Method from the Lot Processing tab on the Item Branch/Plant form. The chosen lot-date bucket can be defined as a number of days ahead or behind other lot dates, such as Expiration Date.

Customer-Centric Methodology – Advanced Preferences can now be set up much like Advanced Pricing by using versions of the Advanced Pricing programs, but with processing options set differently. This affords you the ability to do things like commit inventory to sales orders by branch/plant and by customer/item combinations or groups from Advanced Pricing.

For example, one customer or customer group may accept only lots with at least 30 days remaining before the expiration date, while another requires 45 days, and a third has a 60-day policy. You can meet these customer-driven requirements by basing the advanced preference on ship-to or sold-to address.

Or, if a bill-to customer has ship-to's in the continental United States and others in Hawaii, for instance, the ship-to's can each be set up with different freshness requirements.

If you choose to ship to certain customers only out of a particular warehouse, you can set up the system to commit inventory based on a date bucket that represents a different number of days remaining before the Expiration Date for each warehouse. If applicable, the same complex customer/item groups that you set up for Advanced Preferences may also be used for Advanced Pricing.

You can set up the system to commit inventory based on various dates and complex customer/item groups without activating Grade/Potency Control. Instead of just one lot date (Expiration Date), there are now a total of eleven lot dates, eight of which can be used to commit inventory in Sales Order Management. Let's compare:

- **Old Faithful Functionality**
    - o Lot Expiration Date
- **Bigger and Better Functionality**
    - o Lot Expiration Date
    - o Best-Before Date
    - o Sell-By Date
    - o User Lot Date 1
    - o User Lot Date 2
    - o User Lot Date 3
    - o User Lot Date 4
    - o User Lot Date 5

In Advanced Preferences, the Advanced Lots – Ship Ascending advanced preference lets you commit inventory from lots based on the same customer/customer group and item/item group combinations that you would set up in Advanced Pricing. Not only can you set up complex customer and item groups, but you no longer need to run Preference Batch Processing (R40400) because some advanced preferences can automatically drive values into the F4211 Sales Order Detail file in a way similar to Advanced Pricing.

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