Inventory Lot Attributes

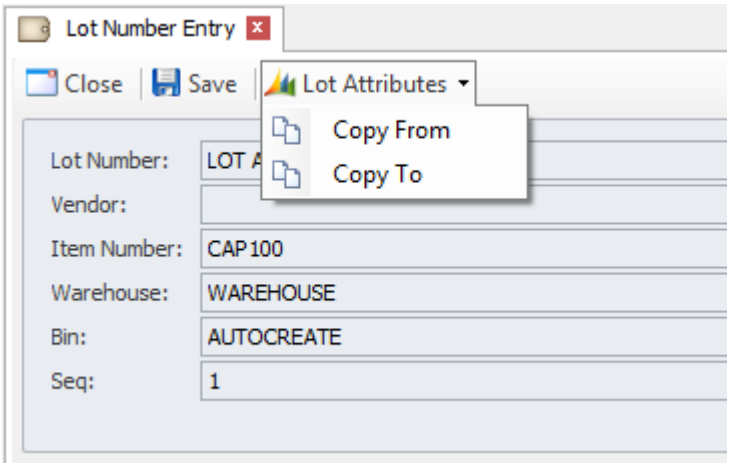
Cavallo Support - 2024-11-22 - Inventory

Overview

The Lot Attributes Copy window in SalesPad provides the user with ability to copy GP lot attributes and SalesPad lot user fields between inventory lots. The user can copy from or copy to the selected lot, and can also select if he/she would like to copy lot attributes, user fields, or both.

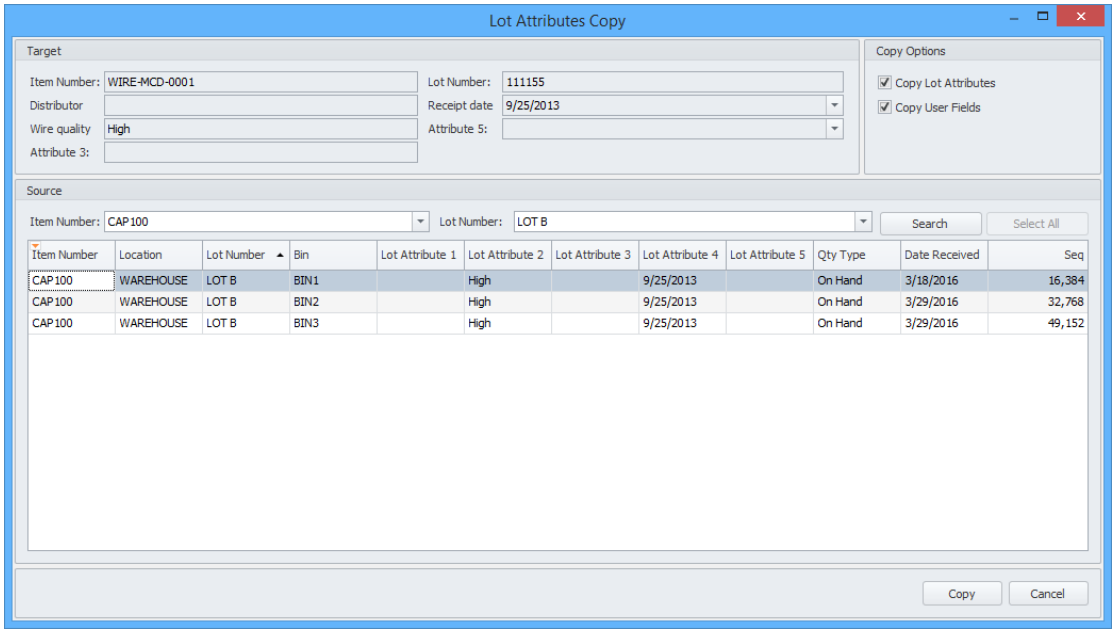
Copying Lot Attributes and User Fields

The Inventory Lot Attributes Copy screen is accessible from the Lot Number Entry card. In SalesPad, navigate to Modules > Inventory > Lot Number Search. Search for the desired lot, then click the link to open the Lot Number Entry card. The Lot Attributes menu is available on this card.



Copy From

The Copy From option allows the user to copy lot attributes and/or user fields to the currently opened lot on the Lot Number Entry card.

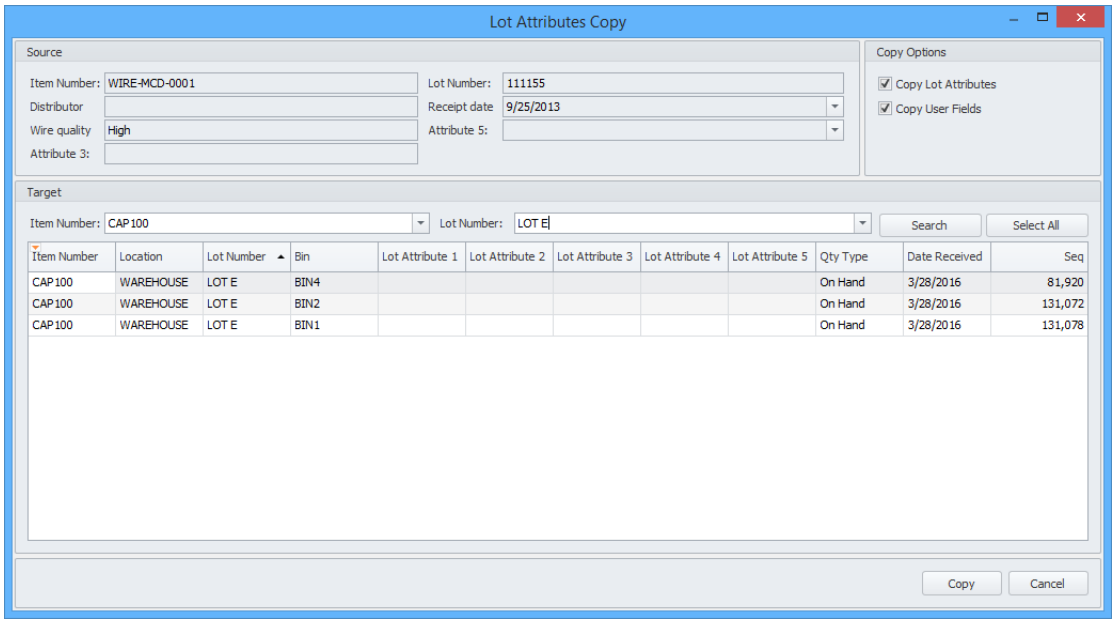


The target lot is displayed in the Lot Attributes Copy window, along with current lot attributes. Source lots are displayed on the grid. Only one source lot can be selected for copying at a time, so the Select All button is disabled. To make sure all lots for the target item/lot combination are updated, set the 'Copy User Field Values To All Lots With Same Name' security to True.

Note: The user can modify the default field and grid layouts to include user fields.

Copy To

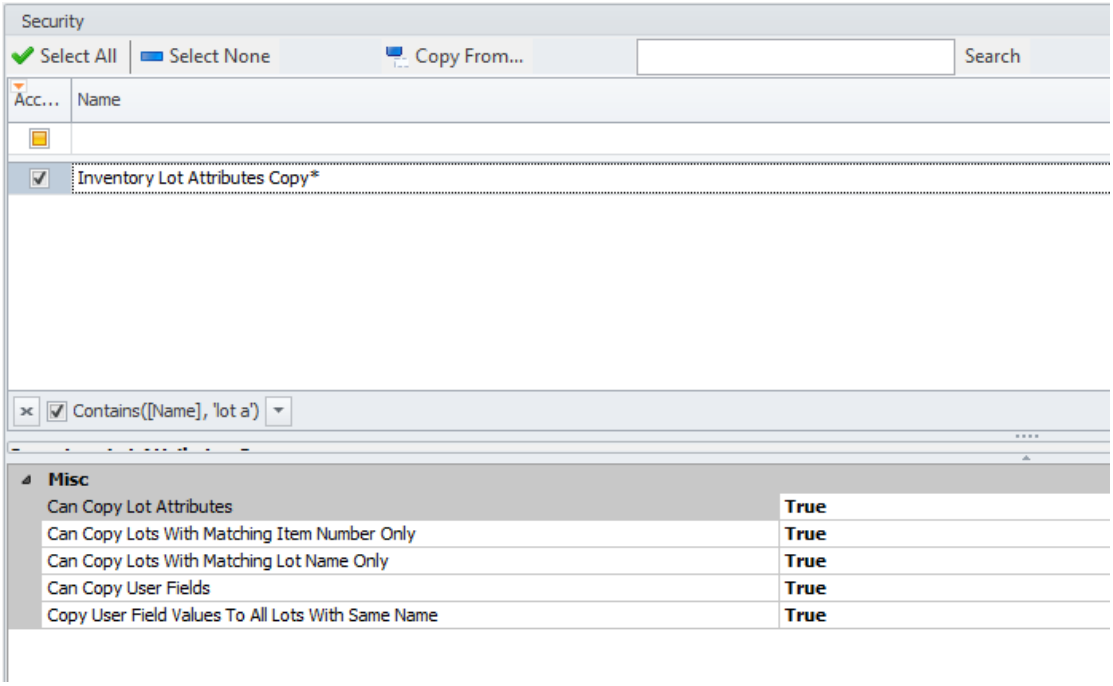
The Copy To option allows the user to copy lot attributes and/or user fields from currently opened lot on the Lot Number Entry card to other lots in the system.



The source lot is displayed in the Lot Attributes Copy window, along with current lot attributes. Target lots are displayed on the grid. Unlike the Copy From option, Copy To permits updating multiple target lots at once. The user can hold the SHIFT key and select desired lots, or click the Select All button to update all lots on the grid.

Security

To access security in SalesPad, navigate to Modules > System > Security Editor. Filter to "Inventory Lot Attributes Copy" for pertinant security options.



Can Copy Lot Attributes – Users can copy GP lot attributes between lots.

Can Copy User Fields – Users can copy SalesPad lot user fields between lots.

Can Copy Lots With Matching Item Number Only – Users can only copy lot attributes and user fields between lots that have the same item number. For example, item CAP100, LOT B can be copied to item CAP100, LOT C, but not to item WIRE-MCD-0001, LOT C.

Can Copy Lots With Matching Lot Name Only – Users can only copy lot attributes and user fields between lots that have the same lot number. For example, item CAP100, LOT B can be copied to item WIRE-MCD-0001, LOT B, but not to item WIRE-MCD-0001, LOT C.

Copy User Field Values To All Lots With Same Name – User fields will be copied to all lots with the same lot number for the selected item. This applies only to the Copy From option, as changes are applied to all lots with the selected item/lot combination regardless of lot quantity type, bin, date received, and date sequence.