

Rootstock Software®

Lot and Serial Control



Rootstock Software® provides the breadth and depth of solutions that today's discrete manufacturers need to operate and grow their business. Whether a small operation with five users, or a large organization with many sites and hundreds of users, Rootstock offers a solution for all sizes and types of discrete manufacturers and supports the manufacturing system requirements of Build to Order, Build to Stock and even Engineer to Order Manufacturers – whether standard or actual cost in both a single and multi plant environment.

Rootstock Lot and Serial Control, supporting NetSuite's lot and serial traceability, provides for an item's lot or serial number to be registered through Purchasing Receipts, Inventory, Shop Floor Control and Sales Order Fulfillment functions.

The Rootstock item master maintenance insures that the Rootstock Item and the NetSuite 'direct material items' are always kept in sync. These NetSuite 'direct material items' are classified as 'Inventory' or "Serial" or 'Lot'. Similarly within Rootstock Item Master maintenance an item can be classified as 'Serial Controlled' or 'Lot Controlled' or 'Neither Serial nor Lot Controlled'.

The Purchasing Receipt function will note the Item Number classification and if 'lot controlled', then the lot number must be assigned to the entire Purchase Receipt for the items being received prior to their 'acceptance' into stock. There is an option that allows the user to assign the 'receiver number' as the lot number which provides for an easy but practical application for the lot identification. If the Vendor assigned a lot number, then this can be assigned by the user instead. If the Item Number is 'Serial Controlled', then prior to the receipt into stock, the serial numbers can be assigned in a 'free form' text field. The software will parse that text box to insure that serial number records are created on the Purchase Receiver and on Item Location Records as well as an "item serial record" insuring that only one serial can be assigned an item.

The lot or serial number, as required, is registered on all inventory additions, adjustments and scrap transactions. While Lot and Serial controlled items are not appropriate for 'backflush' considerations, all other work order and subcontract order issues

record the lot or serial as required on the issue transaction.

On work order supplies the user must record the lot number for 'lot controlled items' and this recording must be done before the assembly is received into stock or scrapped. Likewise serial numbers must be assigned before the work order assembly is received or scrapped.

Pick lists are printed with serial number detail and lot information as appropriate. When sales order is fulfilled the serial number of the final assembly is noted on shipment.

About Rootstock Software®

Rootstock Software® is the leading Software as a Service (SaaS) provider of manufacturing enterprise software serving discrete manufacturers in the mid-market. Rootstock Software® was launched in 2008 in response to the growing need for a SaaS solution for mid-market manufacturers to cut costs, improve processes, and drive revenues. Rootstock is a premier partner with NetSuite Inc, a leading vendor of on-demand, integrated business management software suites for the mid-market enterprise and divisions of large companies. Rootstock and NetSuite deliver these critical manufacturing capabilities to the underserved mid-market with minimal IT infrastructure investment. For more information, please visit <http://www.rootstocksoftware.com>.