ORACLE NETSUITE

Lot Auto Numbering

2022.2

January 25, 2023

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Lot Auto Numbering SuiteApp

The Lot Auto Numbering SuiteApp enables you to define a lot numbering format and select items that require lot auto numbering. You can also configure additional lot information such as supplier lot number and manufactured date and maintain this information in the inventory detail.

The following video gives an introduction to Lot Auto Numbering SuiteApp:

Lot Auto Numbering SuiteApp

The SuiteApp supports lot numbered assembly and inventory items.

Transaction Types

The SuiteApp works when you add new lots in the following transaction types:

- Purchase order
- Item receipt
- Receive inbound shipment
- Work order completion
- Assembly build
- Outsourced manufacturing

Note: When you install the SuiteApp and provide the required permissions and minimum access levels to your role, a custom Inventory Detail popup window appears during the transaction entry. This custom Inventory Detail popup window lets you use the Lot Auto Numbering SuiteApp features. If the role does not have the required permissions and minimum access levels, you get an alert and the standard Inventory Detail popup window opens.

For more information, read Roles and Permissions to Use the Lot Auto Numbering SuiteApp.

Lot Number Formats

Lot number formats are custom numbering formats. These formats are created using lot number format elements. You can assign a single lot number format to one or more items.

After applying a lot number format to an item when you input inventory details for that item, the SuiteApp automatically assigns the lot numbers.

Lot Number Format Elements

Lot number format elements are used to build lot number formats. There are 17 default lot number format elements delivered with the SuiteApp. You can create additional lot numbering format elements using item number fields. For more information, see Creating Lot Number Format Elements.

Each lot number format element used in a lot number format appears as a required field in the Inventory Detail popup window.

The SuiteApp provides the following default lot number format elements:

Format Element	Description
Country of Origin	Country of origin of the item lot. **Note:** You can edit this element.
Day	Two-digit day in the transaction date.
Expiration Date	Expiration date of the lot in YYMMDD format.
Heat Code	Heat code for an item.
Internal ID	Internal Id of the lot numbered item.
Julian Days	Number of days from January 1 in that year to the transaction date.
LDY	Last digit of transaction year.
Location	Receiving or manufacturing location of the transaction.
Manufactured Date	Manufactured date is the date in YYMMDD format.
Month	Two-digit transaction month.
Order Number	Purchase order or work order number.
Receipt Date	Receipt date in YYMMDD format in the item receipt
Sequence Number	Number uniquely defined on each item record that automatically increments by one for each new lot number.
Supplier Lot Number	Lot number received from the supplier.
Text	Free format text that can be up to 12 characters in length.
YY	Last two digits of the transaction year.
YYYY	Last four digits of the transaction year.

Following are some additional notes on the lot number format elements:

- For outsourced manufacturing, the SuiteApp derives values for the following elements from the receipt date. For other transaction types, it derives the values from the transaction date:
  - Julian Days
  - Month
  - Day
  - LDY
  - YY
  - YYYY
- For purchase order transactions, the receipt date element will be blank when determining the lot number.
- If you use a lot number format element in a lot number format, you must also add that element as an additional lot field. You can add the additional lot field either at global level or at item level.
- The lot number format element names are translatable, except for abbreviations like LDY, YY, and YYYY. However, you cannot translate the description of the lot number format elements.

Additional Lot Fields

The SuiteApp enables you to configure an item to capture additional lot information and maintain this information in inventory detail. The SuiteApp provides the following default additional lot fields:

- Heat Code
- Manufactured Date
- Supplier Lot Number
- Country of Origin

Note: The **Country of Origin** additional lot field is editable.

You can create additional lot fields using item number fields at global level that can be applied to all items, or at specific item level. These additional lot fields are visible only when you create or edit a transaction. For more information, see Creating Additional Lot Fields.

Known Limitations

The SuiteApp has the following known limitations:

- You cannot import the following using the CSV import feature:
  - Lot number formats
  - Lot number format elements
  - Additional lot fields in inventory detail
- You cannot perform the following operations using SOAP or REST web services:
  - Create or update item lot information
  - Create or update additional lot fields
  - Import additional lot fields in inventory detail

Installing the Lot Auto Numbering SuiteApp

Install the Lot Auto Numbering SuiteApp from the SuiteApp Marketplace. For more information, see the help topic Installing from the SuiteApp Marketplace.

Lot Auto Numbering is a managed SuiteApp that automatically updates whenever enhancements or new features are added.

Note: Do not use the AutoLot_Custom_Role role delivered with the SuiteApp. The role is provided for internal processing and you must not use the role.

Prerequisites for Lot Auto Numbering

The Lot Auto Numbering SuiteApp is developed and tested for use primarily with NetSuite OneWorld. For more information about NetSuite OneWorld, see the help topic Introduction to NetSuite OneWorld.

To use the Lot Auto Numbering SuiteApp, an administrator must enable the following features:

Subtab	Feature Name
Items & Inventory	▪ Advanced Bin/Numbered Inventory Management ▪ Lot Tracking
SuiteCloud	▪ Custom Records ▪ Client SuiteScript ▪ Server SuiteScript ▪ SuiteCloud Development Framework

For more information, see the help topic Enabling Features.

Important: Make sure that you do not have existing additional lot fields with any of the following names:

- Heat Code
- Manufactured Date
- Supplier Lot Number
- Country of Origin

If you have existing fields with any of the above names, you must rename them.

Roles and Permissions to Use the Lot Auto Numbering SuiteApp

Administrators can create new roles or customize roles to use the Lot Auto Numbering SuiteApp. For more information, see the help topics Assigning Roles to an Employee and Customizing or Creating NetSuite Roles.

The following table provides minimum access levels for different permissions required to use the Lot Auto Numbering SuiteApp:

Subtab	Permissions	Minimum Access Level
Transactions	Find Transaction	View
Lists	Custom Record Entries	Full
	Documents and Files	View
	Locations	View
	Items	View
Setup	Custom Entity Fields	Full
	Custom Fields	View

Subtab	Permissions	Minimum Access Level
	Custom Item Number Fields	Full
	SuiteScript	View
	SuiteScript Scheduling	Full
Custom Record	Auto Format Element Mapping	View

Center Category and Center Types

For a custom role, you can add the Lot Auto Numbering center category and links. Use the following information when creating the center category:

- **Center category label** – Label the center category as Lot Auto Numbering.
- **Center type** – Select the desired center type.
- **Center tab** – Select the desired center tab.
- **Links** – Add the following links:

Link	Label
Lot Number Format	Lot Number Formats
Lot Number Format Element	Lot Number Format Elements
Additional Lot Fields	Additional Lot Fields

For more information, see the help topics Creating Center Categories and Creating Center Links.

Create Item Number Fields

Item number fields are required to create lot number format elements and additional lot fields. You can create item number fields from the Item Number Field page. Go to Customization > Lists, Records, & Fields > Item Number Fields > New. When creating an item number field, you must make the following selections on the Item Number Field page:

- Choose the **All Items** radio button (required only for additional lot fields created at global level)
- Check the **Lots** box (required only for additional lot fields created at global level)
- Make sure the **Default Access Level** list in the **Access** subtab is set to **Edit**

Lot number format elements work with the following item number field types:

- Check Box
- Date
- Decimal Number
- Free-Form text
- Integer Number
- List/Record
- Percent
- Time of Day

Additional lot fields work with the following item number field types:

- Check Box
- Currency
- Date
- Decimal Number
- Email
- Free-Form text
- Hyperlink
- Integer Number
- List/Record
- Percent
- Phone Number
- Text Area
- Time of Day

Note: After you add an item number field to an additional lot field, do not change the item number field to an unsupported type.

Edit Item Number Field Name or Type

If you must edit the type of an item number field that is added to a lot number format element, note the following recommendations:

Change in Item Number Field	Recommended Actions	
	Additional Lot Fields Page	**Lot Number Format Page and Lot Number Format Elements Page**
To a type supported for lot number format element	No action required	Remove the item number field from the lot number format element that uses the item number field and add the same item number field again. Also, remove the lot number format element from the lot number format and add it back again.
To a type not supported for lot number format element but supported for additional lot fields	No action required	Remove the element from the lot number format and delete the lot number format element
To a type not supported for additional lot fields	Choose from the following: - Remove the item number field from additional lot fields - Revert the item number field to the previous type	Choose from the following: - Remove the element from the lot number format - Revert the item number field to the previous type

For an item number field name change, you must update the lot number format element that uses the item number field. Remove the item number field from the lot number format element and add the same item number field again.

Creating Lot Number Format Elements

Use the Lot Number Format Elements page to create additional lot number format elements.

To create a lot number format element:

1. Go to Lists > Lot Auto Numbering > Lot Number Format Elements > New.
2. From the **Item Number Field**, click the double arrow to list the item number fields, and then select the item number field.
3. (Optional) In the **Description** field, enter the description for the lot number format element.
4. Click **Save**.

Creating Lot Number Formats

Create a lot number format to apply to items.

To create a lot number format:

1. Go to Lists > Lot Auto Numbering > Lot Number Formats > New.
2. In the **Name** field, enter the name of the lot number format.
3. In the sublist, add elements.
    a. From the **Element** list, select an element.
    b. (Optional) If the selected element is **Text**, to add text to the lot number, enter the text in the **Text** field.
    c. Click **Add**.
    d. To add more elements, repeat Steps a to c.
4. (Optional) To preview a sample lot number generated from the selected elements, click **Preview**.

    Note: Preview is available only when NetSuite is used in English (US) language.
5. Click **Save**.

Creating Additional Lot Fields

Create additional lot fields that you want to add in the inventory details. Then you can map additional lot fields to specific items.

To create additional lot fields:

1. Go to Lists > Lot Auto Numbering > Additional Lot Fields.
2. Click **Edit**.
3. In the sublist, make the following selections:
    a. From the **Element** list, select the item number field that you want to use as additional lot field.

To create item number field, see Create Item Number Fields.

b. From the **Purchase Order** list, select the way in which the element applies in a purchase order.
   - **Not Applicable** (default selection) - The field does not display in the Inventory Detail popup window.
   - **Optional** - The field displays as a column but entering a value in it is optional.
   - **Required** - The field displays as a column and you must enter a value in the column.

c. From the **Work Order** list, select the way in which the element applies in a work order. To know more about the options, refer to Step b

d. Click **Add**.

e. To add more lot fields, repeat Steps a to d.

4. Click **Save**.

   The additional lot fields are mapped to all items.

   Depending on the selection in the purchase order and work order columns, the additional lot fields appear as columns in the Inventory Detail popup window.

Depending on the system resources and concurrency limit, you may face delay in updating the lot record with additional lot information after saving the transaction.

Mapping Additional Lot Fields to Selected Items

Use the following procedure to map additional lot fields to specific items.

To map additional lot fields to selected items:

1. Go to Lists > Lot Auto Numbering > Additional Lot Fields.
2. Click **Edit**.
3. Click the **Item–Element Mapping** button.
4. In the popup window, do one of the following to select items for mapping:
   - From the **Items** list, select the items to which you want to map the elements.
   - If you have a saved search to select items, you can use the saved search. Choose the **Select Items Using Saved Search** radio button and then select a saved search from the **Saved Search for Selecting Items** list.

     Note: The **Saved Search for Selecting Items** list filters the saved searches locked by any other SuiteApp.
5. In the **Elements** sublist, make the following selections:

   a. From the **Element** list, select the item number field that you want to use as additional lot field.

      To create item number field, see Create Item Number Fields.

   b. From the **Purchase Order** list, select the applicability of the element in a purchase order.

   c. From the **Work Order** list, select the applicability of the element in a work order.

   d. Click **Add**.

   e. To add more fields, repeat Steps a to d.

6. Click **Submit**.

   A banner shows the progress of the mapping. When the mapping is complete, the banner provides a link to view the mapping report. Depending on the system resources and concurrency limit, you may face delay in item element mapping appearing in the item record.

   Depending on the selection in the purchase order and work order columns, the additional lot fields appear as columns in the Inventory Detail popup window.

You can also map elements to an item from the **Item Additional Lot Fields** sublist in **Lot Numbering** subtab of the item record.

Map Additional Lot Fields Using CSV Import

You can use the CSV import feature to map additional lot fields with items. The import type is Custom Records and record type is Item Additional Lot Fields. When using CSV import, you must:

- Choose **Add** as the **Data Handling** option.
- Check the **Run Server SuiteScript and Trigger Workflows** box.

For more information on the CSV import feature, see the help topic CSV Imports Overview.

Guidelines for Mapping Additional Lot Fields to Matrix Items

When mapping additional lot fields to matrix items, note the following:

- When you map additional lot fields to matrix items using CSV import and include the parent item in the import, the subitems are automatically mapped.
- For matrix items, the additional lot fields defined in **Item Additional Lot Fields** sublist of the parent item are not propagated to the child items.
- You can map item lot information using CSV import for only existing matrix items and subitems. The CSV import feature cannot map item lot information for parent-child relationships that are not created before import.
- When you map a parent matrix item using CSV import, the SuiteApp can map up to 499 child items.

Lot Auto Numbering Subtab

After creating lot number formats, you can add these formats to items. The **Lot Numbering** subtab in the item record provides the following settings for adding the lot number formats to items:

Setting	Description
Enable Lot Auto Numbering	Check this box to apply lot auto numbering for lots of the item.
Lot Number Format	Select the lot number format for the item.
Initial Sequence Number	If sequence number is part of the lot number format, enter the number from which you want to start the sequence number.
Current Sequence Number	Shows the number that will be assigned as part of the lot number in the next transaction.
Additional Lot Fields	Click **View** to open the Additional Lot Fields page.

Setting	Description
	From the Additional Lot Fields page, you can configure the display of custom columns in the Inventory Details popup window.
Item Additional Lot Fields	In this sublist, select additional lot fields that you want to display in the Inventory Detail popup window. **Note:** **Note:** When you create a copy of the item, additional lot fields are not copied to the item's copy.

When you create or update items using the CSV import feature, note the following:

- The CSV import feature does not add or update the **Item Additional Lot Fields** sublist information.
- If **Enable Lot Auto Numbering** is set to **No**, the **Lot Number Format** and **Initial Sequence Number** values are ignored.
- If **Enable Lot Auto Numbering** is set to **Yes**, but lot number format does not contain sequence number, the **Initial Sequence Number** value is ignored.
- When updating an item, note the following. If there is a value in the **Initial Sequence Number** field, any value for the field in the CSV file is ignored.

When importing non lot inventory and assembly items using CSV import, the fields in the **Lot Numbering** subtab appear in the Field Mapping page. However, any data for these fields is ignored when importing.

Generating Lot Numbers

For a lot auto numbering enabled item, when you add a lot and enter values in the additional lot fields, the lot number generates automatically. The generated lot number displays in the **Lot Number** column of the Inventory Detail popup window.

To generate lot numbers:

1. In the **Items** sublist of a purchase order, select an item that has auto lot numbering enabled.
2. Click the **Inventory Detail** icon to open the Inventory Detail popup window.
3. In the **Additional Lot Inventory Detail** sublist, enter the required lot information, such as quantity.
4. Click **Add**.

   The lot number automatically generates and displays in the **Lot Number** column.

When adding multiple rows for the same lot number, values in all other fields must be the same, except for the following:

- Quantity
- Bin (applies to item receipts, work orders, and assembly builds)
- Status (applies to item receipts, work orders, and assembly builds)

If an element in the lot number format does have a value, the element is ignored when generating the lot number.

The automatically generated lot number replaces space character in a lot number format element with a hyphen.

In the Inventory Detail popup window, the format for date and time type of fields is derived from the Set Preferences page.

The value for the **Time of Day** field is based on the date and time format selected in the General Preferences page.