Batches and serial numbers

Stock and inventory

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Batches and serial numbers

Track expiry dates by batch and individual units by serial number.

Intermediate · About 15 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Kuza** and **Enterprise** plans. It is not part of **Biashara**. Contact us if you want to upgrade.

Overview

Some items need tracking beyond a total quantity.

- A **batch** groups units made or received together, usually with an **expiry date**. Use it for paint, medicines, food and chemicals.
- A **serial number** is unique to one unit. Use it for equipment, phones and anything with a warranty.

Steps

Turn tracking on for an item

1. Open the **Item**.
2. In the **Inventory** section, tick **Has Batch No**, or **Has Serial No**.
3. For batches, you can tick **Automatically Create New Batch** and set an expiry rule (**Shelf Life in Days**).
4. Save. This must be done before the first movement of the item.

Receive stock with a batch

1. On the **Purchase Receipt**, in the item row, enter the **Batch No** (or create one), and the expiry date.
2. Submit.

Sell by batch

1. On the **Delivery Note**, choose the **Batch No** to issue (the system shows the batches with stock, earliest expiry first).
2. Submit.

Serial numbers

1. On the receipt, enter one serial number per line in the **Serial No** box, one per unit.
2. On delivery, select the serial numbers being sold.

Practical example

The shop buys 100 tins of paint in batch `PNT-2026-11`, expiring in 24 months. Later, a customer reports a faulty tin. The batch number on the delivery note shows exactly which delivery it came from, so the supplier can be told.

Important notes

- Decide whether an item needs tracking **before** it has stock. Changing it later is difficult.
- Keep the **Batch** report for expiry management. Use the **Stock Ageing** report to spot slow-moving stock.

Common mistakes

- Tracking everything by serial number, which makes data entry heavy.
- Mixing batches in one stock line.

Next steps

Read Valuation and reorder levels.

Related documentation

- Creating items
- Warehouses and stock entries