Purchase Orders and Serialized Inventory Items

Last Modified on 06/08/2022 11:46 am EDT

Serialized inventory items acquire serial number information from the Purchase Order program.

Create Serialized Inventory PO

- 1. Select Purchase Orders on the EnergyService menu.
- 2. Choose Purchase Orders then press Ctrl+C to create.
- 3. Select the Vendor# and shipping Warehouse# receiving the serialized item.
- 4. Press F5 in the Item field and select the serialized inventory items for purchase.

Vendor Name	e / Address				Ship To Ware	house			Comment	3	
Vendor# 1	Q				Warehouse#	28	Q				
RE MICHAEL	LS		12	Select Inventory Bern	-					5	
1105 KERSH	AW ST										-
MONTGOME	ERY, AL 36108		10	ategory [2] ALL		item	Start with Se	arch for		Search	Clea
			D	v Warehouse Name	Loc	Storage	Item	Description	Category	Cost	Q
	Status 1 Q Open		-	7 GLEERTOWN WH	SE 1	WAREHOUSE	MEDP475EW	MAYTAG DRYER	DRYER	560.00	0.0
	Notes			7 EMPIRE BUILDING	11	WAREHOUSE	MEDP475EW	MAYTAG DRYER	DRYER	560.00	0.1
tem	Description Orde	red i	Rec.	7 BUTLER MAIN WH	SE 18	WAREHOUSE	MEDP475EW	MAYTAG DRYER	DRYER	560.00	0.0
AEDX655DW	R MAYTAG DEVER	1.00		7 GILBERTOWN WH	SE 1	WAREHOUSE	MEDP475EW-0	MAYTAG DRYER	DRYER	560.00	0.1
MEDP475EW	Q MAYTAG DRYER	1.00	- 0	7 EMPIRE BUILDING	1	WAREHOUSE	MEDP475EW-0	MAYTAG DRYER	DRYER	560.00	0.1
		1.09		7 BUTLER MAIN WH	SE 18	WAREHOUSE	MEDP475EW-0	MAYTAG DRYER	DRYER	560.00	0.0
			2	7 GLBERTOWN WH	SE 13	WAREHOUSE	MEDK655DW	MAYTAG DRYER	DRYER	473.00	0.1
				7 EMPIRE BUILDING	11	WAREHOUSE	MEDK655DW	MAYTAG DRYER	DRYER	473.00	0.1
				7 BUTLER MAIN WH	SE 18	WAREHOUSE	MEDK655DW	MAYTAG DRYER	DRYER	473.00	0.0
				7 GILBERTOWN WH	SE 13	WAREHOUSE	MEDK6STBW	MAYTAG DRYER	DRYER	414.00	0.1
				7 EMPIRE BUILDING	11	WAREHOUSE	MEDK6STBW	MAYTAG DRYER	DRYER	414.00	0.1
Location	13 Q Vendor Part No MEDX655DW	R	ef P	7 BUTLER MAIN WH	SE 18	WAREHOUSE	MEDX6STBW	MAYTAG DRYER	DRYER	414.00	0.1
Serial#				7 GLBERTOWN WH	SE 13	WAREHOUSE	MGDP475EW	MAYTAG GAS DRYER	DRYER	635.00	0.1
				7 EMPIRE BUILDING	1	WAREHOUSE	MG0P475EW	MAYTAG GAS DRYER	DRYER	635.00	0.1
				7 BUTLER MAIN WH	SE 18	WAREHOUSE	MGDP475EW	MAYTAG GAS DRYER	DRYER	635.00	1.1
				7 GLBERTOWN WH	SE 1:	WAREHOUSE	NED4600YQ	AMANA DRYER	DRYER	263.00	0.1
				Division Warehous	e Name	Location# Storage	Item	Description	Category	Cost	
				7 GILBERT	OWN WHSE	13 WAREHO	USE MEDP47	SEW MAYTAG DRYER	DRYER	560.0	0
				7 GLBERT	OWN WHEE	13 WAREHO	USE MEDX65	5DW MAYTAG DRYER	DRYER	473.0	0 13

- 5. Choose Save Selections when all items have been chosen.
- 6. When a serialized item has been selected, the Ordered quantity will default to 1.00 and cannot be modified.

Each serialized item must have a separate line for each serial number received.

Tip: Select the serialized item and press the Down Arrow on the keyboard. Press Ctrl+D while in the Item

field and it will copy (known as Ditto) the item number listed directly above it.

	Status 1 Q Open						Created by SHANNON	
ltem	Description	Ordered	Received	Price	Disc	Tax%	Tax Expected Dt Last Recv Dt	Line Amount
MEDX655DW	MAYTAG DRYER	1.00	0.00	\$473.00	0.00%	0.00	0.00 12 00/00/00 12 00/00/00	\$473.00
MEDX655DW	MAYTAG DRYER	1.00	0.00	\$473.00	0.00%	0.00	0.00 📅 00/00/00 📅 00/00/00	\$473.00
MEDX655DW	MAYTAG DRYER	1.00	0.00	\$473.00	0.00%	0.00	0.00 🕎 00/00/00 🕎 00/00/00	\$473.00
	Q	0.00	0.00		0.00%	0.00	0.00 📅 00/00/00 📅 00/00/00	\$0.00
	Ctrl+D copies pre	viously sele	cted Iter	m numbe	r dowr	١		

- 7. As serialized items are selected, a *Serial #* field appears at the bottom of the PO. Serial numbers will be entered when the Purchase Order has been received.
- 8. Select Save & Close when all items have been listed.

Receive PO and Update Serial Numbers

- 1. Access the Purchase Order located in the Purchase Order menu.
- 2. Select Modify or press Ctrl+M.
- 3. For serialized items, the line item MUST be selected and 1.0 entered in the Received field.
- 4. A screen will appear asking for the serial number to be associated with the inventory item.

Ordered	Received	Price	Disc	Tax%	Tax Expected Dt	Last Recv Dt		
1.00	1.00	\$473.00	0.00%	0.00	0.00 📅 00/00/00	00/00/00		
1.00	0.00	\$473.00	0.00%	0.00	0.00 17 00/00/00	17 00/00/00		
1.00	0.00	473.00	0.00%	0.00	0.00 17 00/00/00	17 00/00/00		
		Se	erial#					
655DW	Ref Proposal#	Continue						

- 5. Enter the serial number and press **Enter** or choose **Continue**. The serial number is now associated with the item received.
- 6. Repeat Steps 3 5 for each serialized item. Select **Save & Close** when finished.
- Choose OK to finalize the Purchase Order if all items have been received. A message will not display if 0.00 Received quantities remain.
- 8. Once items are received, they are considered as an in stock item for inventory.