

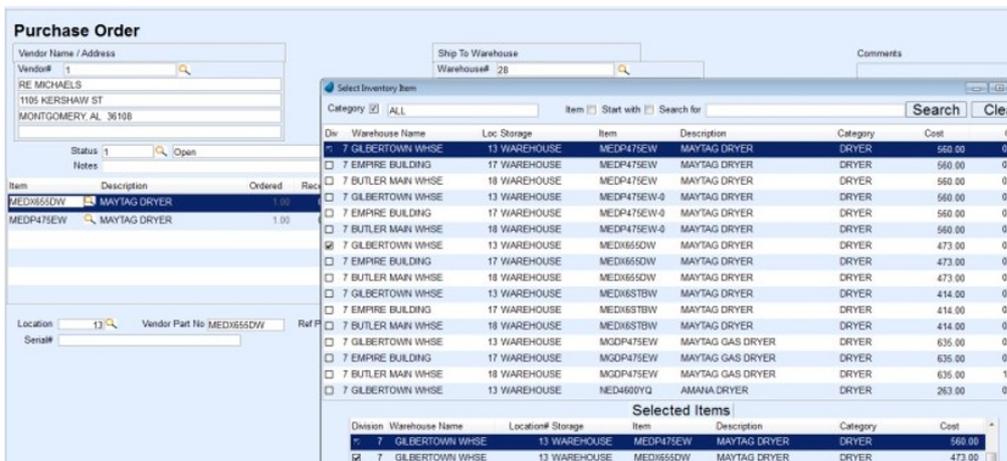
Purchase Orders and Serialized Inventory Items

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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.



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.



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	00/00/00	00/00/00
1.00	0.00	\$473.00	0.00%	0.00	0.00	00/00/00	00/00/00

Serial#

Ref Proposal#

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.
7. 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.