Serialized Items on Sales Transactions

When selling serialized items on sales transactions, you should consider the following:

- In the Item field on sales transactions, you can choose a serialized item from the inventory list. Select a serialized item by entering the item name, UPC, or serial number. When you enter a serial number, the item name or UPC autofills in the Item field.
- Serialized items added to sales transactions must include a serial number for each item when the transaction posts.
    - If a serialized inventory item is selected on a non-posting sales transaction, you enter a serial number when the order is fulfilled.

      Non-posting sales transactions include the following:
        - Prepare Estimates
        - Enter Sales Orders

      If a serial number is entered on a non-posting sales transaction, that serial number **is not on hold** and is available for sale on transactions.
    - If a serialized inventory item is selected on a posting sales transaction, enter a serial number on that transaction.

      Posting sales transactions include the following:
        - Create Invoice
        - Enter Cash Sale
        - Fulfill Sales Orders

          In the Serial Numbers field on a posting sales transaction, enter or select the serial number of the item you are selling. The quantity of serial numbers entered must match the quantity of serialized items on each transaction line.

          For example, if you are fulfilling three serialized items, the fulfillment must show three serial numbers.
- To add a new serialized inventory item, go to Lists > Accounting > Items. Click New. Click Inventory Item, and then click Serialized.
- To choose multiple serial numbered items on sales transactions, click the Select Multiple link next to the Serial/Lot Numbers field. A popup window lists available serial numbers for the item. Click each item in the left pane to add it in the list right pane. When you click Done, all items in the right pane of the popup window are added to the transaction.
- When you view a sales order, invoice, or cash sale that has more than 10 serial numbers entered, **More...** displays below the serial numbers. If you point your cursor at **More...**, a tooltip window opens that lists all the serial numbers. You can click a serial number in this tooltip window to open the serial number record.
- After an order is fulfilled and billed, the serial number on the cash sale or invoice appears for information only. Changes made to the serial number no longer affect inventory.
- If you change a serial number on a transaction, the serial number is not updated automatically on any existing linked transactions. You must update the serial number manually on the linked transactions to match the new serial number. For example, you change the serial number on a sales order when an item fulfillment record has already been created and linked to the order. You must also update the serial number on the item fulfillment.
- Note the following when you view a saved sales transaction that includes a serialized item. If you click the serialized number to view or edit values in the Memo field or a custom field on the inventory number record. For more information, see Customizing Lot or Serial Numbered Item Records.

For information about selling serialized inventory using Multiple Units of Measure, see Using Item Records.

Related Topics