

Maintaining Serial Numbers

Andrew:

This last shipment had a list of serial numbers with it. Do we need to save that?

Robert:

Yes! We need to enter those as we receive each item. Serial numbers help us keep detailed tracking on more expensive items!

Andrew:

Oh! I see, so if a customer tries to return something expensive like a lawn mower, we can know for sure we sold them it!

Robert:

Exactly, another common use for serial numbers is to verify warranty information.

Why don't I show you how to handle them?

Pick a topic and we'll dive in!

Topics

- Serial Numbers in Inventory Maintenance
- Serial Numbers while Receiving
- Serial Numbers in POS
- Serial Number Report and Count

Serial Numbers in Inventory Maintenance

To begin tracking serial numbers for specific SKUs, Flag the items in Inventory Maintenance using the Tally Code field.

Load the desired SKU and select the Codes tab.

In the POINT-OF-SALE column, set the Tally field to S – Serial Number.

Select Change to save the adjustment.

You can now add serial numbers to this SKU.

Open the Miscellaneous menu and select Serial Numbers under the Maintain Section.

Then choose Add.

Enter a serial number you want to assign to this product. If you don't have one, you can enter NSN instead and Eagle will assign it.

The Reference can be anything from the location to a general comment.

Choose whether this serial number is Available or not sold at POS.

Select a store and press OK.

You can also use the Serial Numbers for SKU window to change, delete, or print a label.

You can use the search function on release 25.1 and higher to determine if a serial number has been sold.

Select the All button to display all serial numbers, including unavailable items. The available and Date Sold columns display in the grid.

You can see details on a sold item by selecting the line and choosing the Sold Info button.

Select View documents to see the receipt or invoice from the transaction.

Use the Serial # box to search for specific serial numbers.

Select the Avail button to display only currently available serial numbers.

On release 27.1 and higher, you may have the same serial number on more than one SKU.

This is common in the firearms industry.

To enable this, set Option 1789 to yes.

Serial Numbers while Receiving

You can add serial numbers during the receiving process.

Display an existing PO and choose Receive. Select the appropriate option to move to the receiving screen.

Double-click the serial number item and enter the received quantity.

Press enter and select an option to enter the serial numbers manually or import them from a spreadsheet.

To enter them manually, complete this screen with Serial Number, reference, Availability, and Store. Repeat this for each serialized item received.

Instead of manual entry, you can use serial numbers from an import file.

Create a .csv spreadsheet file that conforms to the specifications displayed with fields named Store, SKU, Part Number, Serial Number, and Reference.

Make sure you save the finished spreadsheet as a .CSV file and move it to the drive location displayed.

Once your file is in place, select it using the dropdown, and choose OK.

If you set up the file correctly, the Import Successful screen displays. Select OK to confirm.

Once you assign the serial numbers, complete the rest of the receiving process as usual.

Serial Numbers in POS

When you sell an item with an S tally code, add them to Point of Sale one-at-a-time, and Eagle will prompt you to select the item's serial number.

Select the correct one and press Ok.

The serial number displays with the item and prints on the transaction receipt.

If there are no serial numbers available, your security settings may allow you to add one here.

If a serial number does not appear with its product, fix it with the Assign Serial number function in the Posting Menu.

When all the S-type Tally items have serial numbers assigned, you may complete the order as usual.

Use Quick Recall Viewer to locate completed transactions that contain a serial number.

Enter the number into the SKU field.

Select Enter, and Eagle displays the record for that serial number.

Serial Number Report and Count

Use the Alternate Part Number Report to print lists of serial numbers sold each day, or to remove old serial numbers from your system.

On the Options tab, select Report Type W to print a serial number list. Enable only option H; disable the rest.

Open the From/To page and set the correct Date Sold setting that you want to search. Select Y if you are adding this to your End of Day Queue.

When you view this report, Eagle shows any serial numbers that have been sold in the Date Sold range.

You can also remove serial numbers with the Alternate Part Report.

On the options tab, use report type U to print UPC list, and then enable Option Z.

Enter the number of months that you want to keep sold serial numbers.

Remember, it's important to consider manufacturers' warranties, and your return policy to determine this number.

This report removes any sold numbers that have been in the system longer than the entered time.

On Release 27.1 and higher, you can use the Serial Number Viewer to see All, Available, and Sold serial numbers.

The fields SN Last Physical and PIP Date Counted allow you to easily add items to Physical Inventory Posting.

Enable the check box and select Apply

Counts to PIP from the menu.

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