

Import Serial Numbers In Receiving Transcript

Andrew: Wow. There are a lot of new serial numbers. I guess I better get started entering them in.

Robert: Oh, Hold up. You don't have to do that.

Andrew: I don't? What do you mean?

Robert: Well, you can import file lists of serial numbers when you receive the inventory. Go ahead and select an option on the menu and we'll get into the details.

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Import Setup

Before Importing Serial Numbers in Receiving, you need to set your Options to allow it. From OPT, select Option 1846. The Default is set to N, for No Import Available. You have three choices here.

Select F to only import Firearms from Receiving. If you want to import Standard Serial Numbers but NOT Firearm Serial Numbers, select S. Choose option B to import both Firearm and Standard Serial Numbers. Press OK once you've made your selection and choose Change from the Ribbon Menu to save the update.

Build the Import File

Eagle creates the base import file for the items you receive with serial numbers. After you create a PO and add all of the items to it, select the Miscellaneous button in the Posting screen. Choose Build CSV file for Receiving Serial Numbers.

The screen will indicate the path where the import file can be found. On your computer, follow that path to locate the file. Open the file with either your spreadsheet software or your notepad application. We'll use Notepad.

The top two lines are comment lines. The next line shows column and header names. Do not change this information. It must stay in the order it is displayed. Below that is a line for every item with a serial number shipped. Make sure that if the item should have a serial number, it has been set up appropriately in Inventory Maintenance.

If you have ordered ten firearms, for example, there will be ten lines; One for each firearm. The text, Replace_Serial_1_Here is where you need to paste the item's Serial Number. When you open this file in a spreadsheet, you can paste in all of the serial numbers at once. You may have orders where there are multiple items with serial numbers. All of the items will be listed here. Fill in all serial numbers before continuing. After you have replaced all of the serial numbers, best practice is to create a serial numbers file on the desktop and save the CSV file there. Any files left in the current folder will be deleted when the Scheduler runs its clean-up process.

Import at Receiving

To Import the file with the serial numbers, Receive the Purchase Order. Select the Only receiving method. When you receive a SKU with serial numbers, the Serial Number Entry Method displays. Select Import Serial Numbers from File.

Locate the file from the dropdown list and press OK to load it. The CSV file must be placed in the location indicated here. If it is not there, you must add it before continuing. A screen displays showing the list of SKUs and their related serial numbers that have been imported.

A serial number that has already been added will have a Status of Already Exists. If you have multiple SKUs with serial numbers on the same order, receive each SKU line and select Import Serial Numbers from File for each of them. Then, complete the receiving process as you normally would.

Exceptions

There are a few exceptions that may occur when you are importing serial numbers. If the csv file has fewer serial numbers than the quantity you are receiving, a message will display indicating this. Here you can see that since two units were received, Eagle expected to find two serial numbers, for SKU 40821.

A display message will also indicate if there are more serial numbers in the import file than the number items received. If the import file has the incorrect header name or sequence, the import will not load. If your serial numbers have not been imported into the file, and your file still has the template text: “Replace_Serial_1_Here”, the import will fail.

Make sure the item number in Eagle matches the item number listed in the import file. Otherwise, it will not upload. Finally, if your serial number exceeds the 30 character limit, the import will also fail. Any serial numbers over 30 characters will be skipped.

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