



## **Serialized Parts**

### **How to Enter a Serial Number on a Parts Sale**

Software Development  
RIMSS Business Systems Technology

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In certain situations there is a need to enter a Serial Number of a part that is being sold to a customer and the Serial Number needs to be printed on the Sales Document. These instructions will cover how to set the Part Master to prompt for a Serial Number, how to correct a Serial Number that was entered incorrectly and how to track the Serial Number that was sold.

The control of serialized parts is done in the Item Master. The Item Master has a check box to indicate when the item is sold; a Serial Number must be entered. The Item Master does not contain the Serial Number.

Open the Item Master from Inventory → Find → Inventory Item

RIMSS WinNetStar Inventory Master List

Add New Refresh Print Layouts Bin Labels Manual Entry

Location: SAN ANTONIO Price Book: All Price Books Item Number: 1013988R OEM Vendor: ALL OEM Division: Item Description:

Category: Group: Class: Pricing Source: Stock Class: ☐ Include Catalog

Drag a column header here to group by that column

Select...	Associations	Inactive	Has Associations	Data Source	Company	Location	Price Book	Item Number	Oem Vendor	Oem Division	Description	QOH	Committed	AFS	Com. On Order	Average Cost	Location System ID	System ID	Serialized
>	DA	False	<input checked="" type="checkbox"/>	Location	ACME EQUIPMENT COMPANY	SAN ANTONIO	CAS	1013988R	198		REMAN-MOTOR HYD	117.0	1.0	116.0	0.0	2,826.3324	49	48	False

#1 Enter Item Number  
#2 Press Fetch  
#3 Double click on Item Number to open the Item Master

In the Item Master, check mark the Serialized box, then Save and Close

RIMSS WinNetStar Inventory Master List Item Number - 1013988R-198-- (48)

Save Save and Close Save and New Copy To Other Location

General Mfg. Data Associated Items Locations Pricing Metrics Sales History Notebook Attachments User Defined Fields

**Item Identification**

Item #: 1013988R OEM Vendor #: 198 OEM Division: Serialized: ☒

Description: REMAN-MOTOR HYD Price Book: CAS Core Item #: 1013988C

User Desc: SKU: UPC:

Category: Group: Class: Inactive: ☐

**Stocking Criteria**

Best Stocking Level (Qty): 1.0 Best Reorder Point (Qty): 5.0

BSL Override (Qty): 1.0 BRP Override (Qty): 5.0

BSL Override (Days Supply): 0.00 BRP Override (Days Supply): 0.00

Set Multiple: 0.00

Your Inventory Item List has a column (Serialized) that can be added to your layout to indicate if the item is serialized.

LocationPrice BookItem NumberOEM VendorOEM DivisionItem Description

SAN ANTONIOAll Price Books1013988RALL

CategoryGroupClassPricing SourceStock Class

Include CatalogSelect All

Default

Drag a column header here to group by that column

Select...	Associations	Inactive	Has Associations	Data Source	Company	Location	Price Book	Item Number	Oem Vendor	Oem Division	Serialized	Description	QOH	Committed	AFS
+	DA	False	<input checked="" type="checkbox"/>	Location	ACME EQUIPMENT COMPANY	SAN ANTONIO	CAS	1013988R	198		True	REMAN-MOTOR HYD	117.0	1.0	116.0

After you have entered your item number on the sales document and you attempt to save the document, the following window will display for you to enter the Serial Number

Serial Numbers Required

The Following Items Require a Serial Number Before Saving this Document

Drag a column header here to group by that column

Item Number	Description	Item Serial Number
1013988R-198	REMAN-MOTOR HYD	A1BB2C4

Enter your item Serial Number and press OK

OK

## The Serial Number entered will display on your screen in the "Item Serial Number" column

RIMSS WinNetStar | Inventory Master List | **New Sales Order** X

File Save Save and New Save and Close Print Credit Cards Capture Signature Update Line Item Data Show Open Documents

General Attachments Print History Wholegoods Document Register Document Register Detail Order Status Report Customer Master

Document Type: Sales Order Document #: 0 Invoice #: 0 Document Date: 5/25/2017 Project #:   
 Status: Open Customer PO #: Salesman: Lee Chesnut CC Auth. #: Sub Project #:   
 Internal Memo: Printed Memo:

Customer Address and Shipping Information (Ctrl-F9)

Customer Name and Address Shipping Information

Name: ROWDY DOG   
 Address 1: 2710 TREBLE CREEK   
 Address 2:   
 Attention:   
 City: SAN ANTONIO   
 State: TX Zip Code: 78258   
 Primary Contact: CHESNUT, BUDDY (800) 766-4642

☐ Ship To Shipping Method:   
 Shipment Date: 5/25/2017   
 Address 1:   
 Address 2:   
 Attention:   
 City:   
 State: Zip Code:

Show Customer Information (F9)

Item Number (Ctrl-N): F2-Find Customer F3-Add Misc. Charges F4-Item Search F5-Apply Core Credits F10-Apply Discount

Ass...	Associations	Type	Item Number	Description	Bin	Quantity	List Price	Price	Amount	Subtotal	Discount	Sales Tax	Total	Item Serial Number	Tax Group	Back Order	Drop Ship
>	DA	Item	1013988R-198	REMAN-MOTOR HYD		1.0000	\$16.50	\$16.500	\$16.500	\$16.50	0.00 %	\$1.65	\$18.15	A1BB2C4	SAN ANTO...	0.0	
		Core Chrg.	1013988R-198	REMAN-MOTOR HYD (Core Charge)		1.0000	\$10.00	\$10.000	\$10.000	\$10.00	0.00 %	\$1.00	\$11.00		SAN ANTO...	0.0	

If you don't have the "Item Serial Number" column on your screen, add it from Column Chooser

## Invoice sample with printed Serial Number

ROWDY DOG (10001B)	Invoice	Ship To:	Source	Sales Order 1234
2710 TREBLE CREEK				
SAN ANTONIO TX 78258				
Contact: CHESNUT, BUDDY (800) 766-4642				

Item Number	Description	Qty	List	Bin Location	Price	Amount	Disc	Subtotal	Sales Tax	Extended Amount	Back Order
1013988R-198											0.0000
REMAN-MOTOR HYD		1.00	\$0.00		\$16.500	\$16.50	0.00%	\$16.50	\$1.65	\$18.15	
SN: A1BB2C4											
1013988R-198											0.0000
REMAN-MOTOR HYD (Core Charge)		1.00	\$0.00		\$10.000	\$10.00	0.00%	\$10.00	\$1.00	\$11.00	
1013988R-198											0.0000
REMAN-MOTOR HYD (Core Return)		-1.00	\$0.00		\$10.000	(\$10.00)	0.00%	(\$10.00)	(\$1.00)	(\$11.00)	

If you find that you entered the Serial Number incorrectly, it can be corrected in the Customer Line Item Detail Report.

Navigate to Reports → Customers → Customer Line Item Detail Report

Location: All Doc. Type: Invoice Doc. Status: Settled, Open, Closed, Partial, Paid Line Type: Item, Core Chrg., Core Ret., Misc., Wholegood, ...

Customer: WG SN: Cust. PO#: Invoice #: Doc. #:

Item SN:

Date Filter: Period: Today From: 5/25/2017 To: 5/25/2017 Fetch

Custom Date Range

Standard Grid Pivot Grid

Right click on line item containing the Serial Number, select "Edit Serial Number" and enter the correct Serial Number in the window that displays.

Service Type	Location Name	Doc Type	Doc Date	Doc Status	Document Number	Invoice Number	Customer Name	Customer PO	Salesman	Line Type	Customer Type	Item Number	Item Desc	Item Serial Number	Quantity	Price	Line Amount	Discount
	SAN ANTO...	Invoice	5/25/2017	Paid	1236	862	ROWDY DOG		Lee Chesnut	Item	Retail	1013988R-...	REMAN-MO...	A1882C4		16.50	\$16.50	0.00 %
	SAN ANTO...	Invoice	5/25/2017	Paid	1236	862	ROWDY DOG		Lee Chesnut	Core Chrg.	Retail	1013988R-...	REMAN-MO...			10.00	\$10.00	0.00 %
	SAN ANTO...	Invoice	5/25/2017	Paid	1236	862	ROWDY DOG		Lee Chesnut	Core Ret.	Retail	1013988R-...	REMAN-MO...		-1.0000	\$10.00	(\$10.00)	0.00 %

Enter the corrected Serial Number in the window below

Edit Serial Number

Serial Number: A1882C4

OK Cancel

Enter Serial Number correction, then press OK

You can then reprint a copy of the invoice containing the corrected Serial Number.

The Customer Line Item Detail Report also gives you the ability to search for any invoices containing a specific Serial Number

RIMSS WinNetStar Customer Line Item Detail

Refresh Print Layouts User Reports Pivot Grid Options

Location: All Doc. Type: Estimate, Sales Order, Invoice, Repair Estimate, Repair ... Doc. Status: Void, Settled, Open, Closed, Partial, Paid, NA, Unknown Line Type: Item

Customer: WG SN: Item SN: AABBCC Invoice #: Doc. #:

Date Filter: Document Closed Period: Today From: 5/25/2017 To: 5/25/2017 Fetch

Standard Grid Pivot Grid

Drag a column header here to group by that column

	Service Type	Location Name	Doc Type	Doc Date	Doc Status	Document Number	Invoice Number	Customer Name	Customer PO	Salesman	Line Type	Customer Type	Item Number	Item Desc	Item Serial Number	Quantity
>		SAN ANTO...	Invoice	5/25/2017	Paid	1236	862	ROWDY DOG		Lee Chesnut	Item	Retail	1013988R-...	REMAN-MO...	AABBCC	1.0000

Enter the Serial Number here to search for and press fetch