

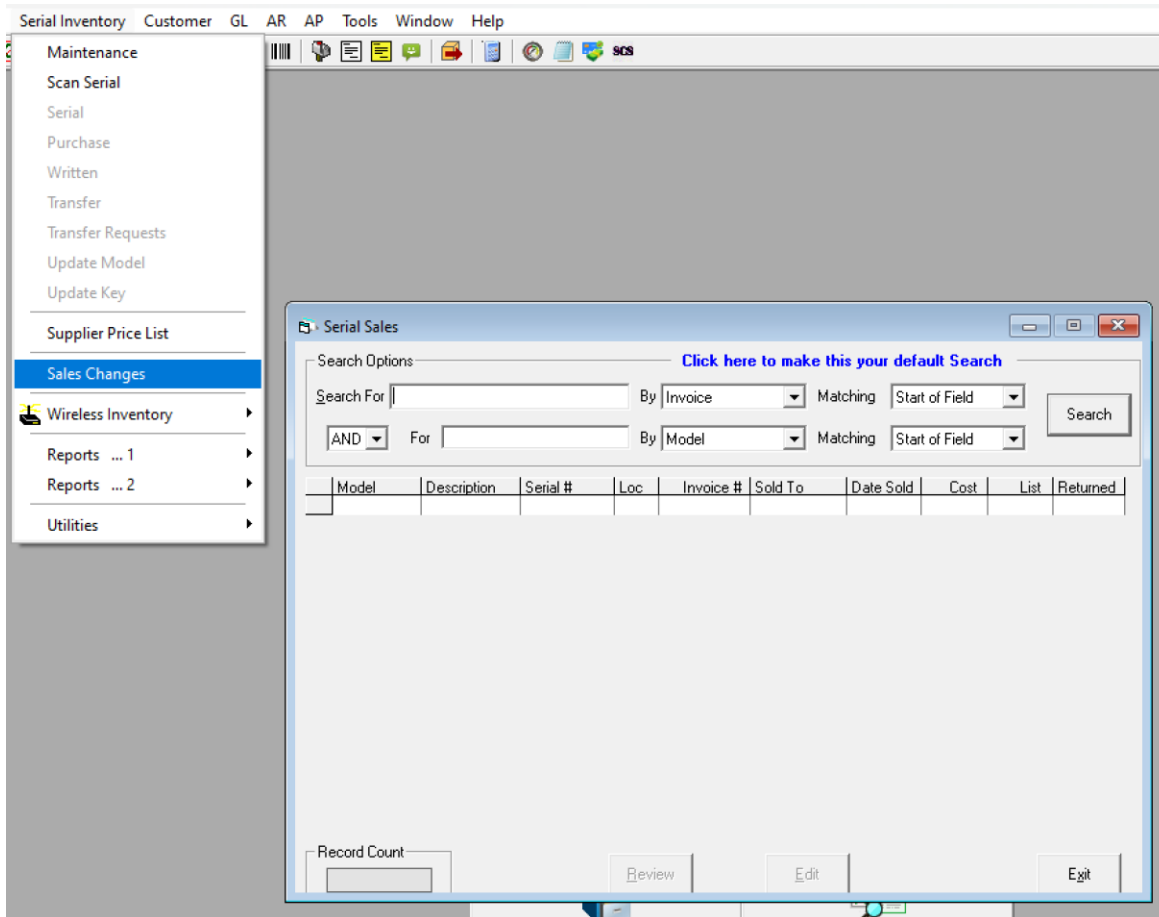
How to Edit an Incorrect Shipped Serial:

This document will walk you through different scenarios and how to correct an incorrect shipped serial

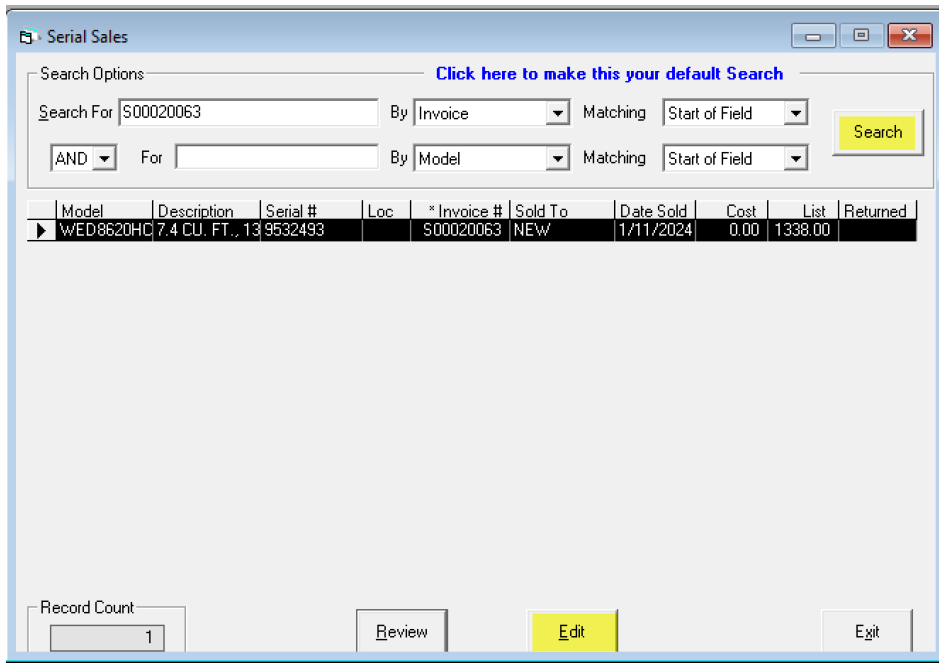
Scenario 1:

The wrong Serial barcode was scanned and the correct one is in inventory.

To correct this, you would use the Sales Changes option under Serial Inventory Menu



You would then search for the Invoice that was incorrect and select edit



You can then use the little grey box next to the Serial # to select the correct Serial that was delivered to the customer



Note: After the Sales Change is complete, please check Barcode Labels on Hand. A new inventory label may need to be re-printed.

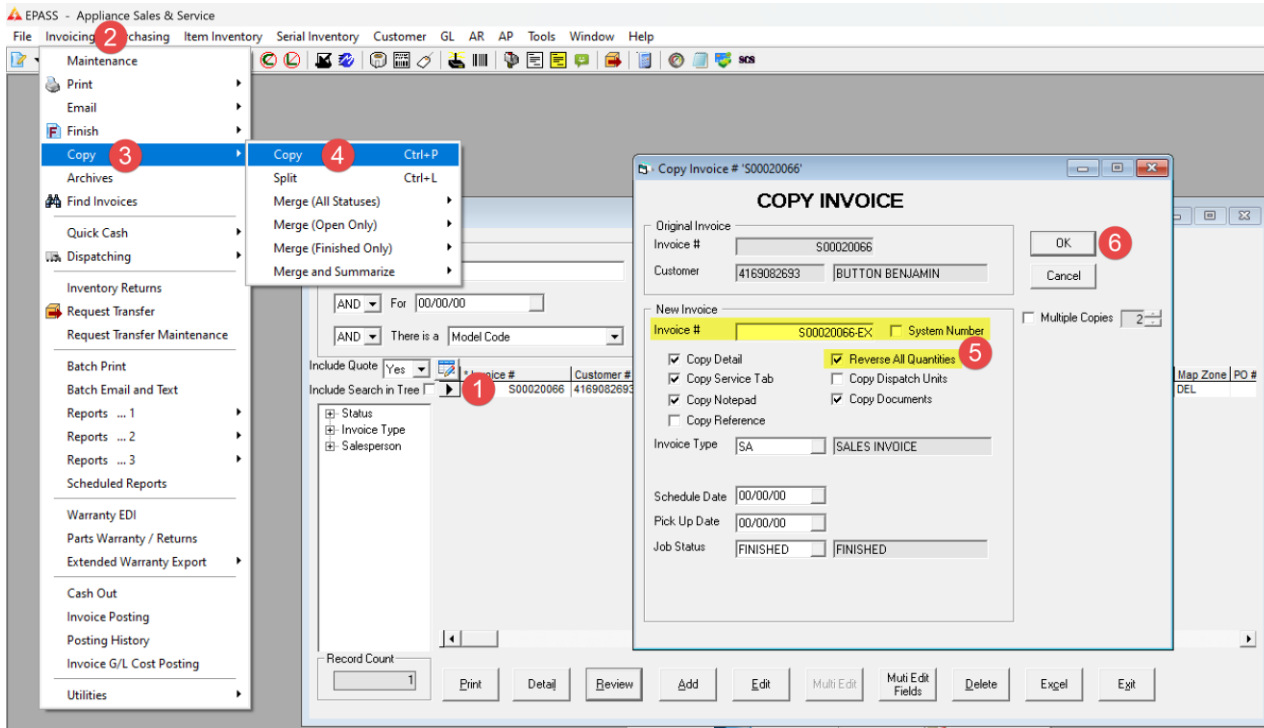
Scenario 2:

The wrong Serial was shipped and was incorrect at the time of shipping and there is no other QOH. This can be handled in 2 ways

Option 1

If there was a Warranty sold with the model that was shipped incorrectly, a full exchange invoice would need to be created to assure the correct Serial is submitted for Warranty.

To complete an exchange, you would copy the finished invoice – (unselect System Number and check off ‘Reverse Quantities’).



Then delete the lines you do not need, and add the model again as a positive number.

Invoicing _ _ X

Search Options [Click here to make this your default Search](#)

Search For By Matching

For By Matching Status

There is a Of Matching

Include Quote Yes

* Invoice #	Customer #	Name	Address	Sched Date	Status	Inv Type	SP	Total	Balance	Job Status	Map Zone	PO #
S00020066	4169082693	BUTTON BENJAM	1235 HERAL		Finished	SA	MG	2603.64	0.00	FINISHED	DEL	
S00020066-EX	4169082693	BUTTON BENJAM	1235 HERAL		Open	SA	MG	-2603.64	-2603.64	FINISHED	DEL	

Include Search in Tree

- Status
- Invoice Type
- Salesperson

Record Count

Invoice # S00020066-EX - BUTTON, BENJAMIN - Review Model _ _ X

Type	Pack	Item	Loc	Description	Qty	Amount	Tax	Status	QOH
Model	No	WFW8620HC		5.0 CU. FT., 14 CYCLES, 11 OPTIONS...	-1	-1,338.00	NYN	Committed	10/10
Warranty	No	ZY1499WS		Washers 2 Year \$1000-\$1499.99	1	-60.99	NNN		
Model	No	WED6120HW		7.4 CUFT ELEC DRYER W/HAMPER....	-1	-1,000.00	NYN	Committed	1/1
Warranty	No	ZY1499MA		Major Appliances 2 Year \$1000-\$1499....	1	-40.99	NNN		

Item	Model	Labor	Misc	Comment	Warranty	Payment	Tax	Package	Signature
Model	WED6120HW	7.4 CUFT ELEC DRYER W/HAMF	Ordered	-1		1,000.00	Package	Trip# 1	
Location	Main Stock	Shipped	0	Total	-1,000.00	-31.5	Spiff	0.00	
SKU #	Serial	Location	QOH	1	Std. Cost	685.00			
Equip		Not Avail	0					00/00/00	
Brand	UNKOWN	QOO	1						
Product	PRICE LIST IMPOF	Color	Written	0				Status	Committed
Mfr Wty	0	Features	Inventory Type					Created	
PO #	Reference	<input type="checkbox"/> Auto Backorder						XYZ	1/16/2024
Branch	Default	Commission	<input type="checkbox"/> Reserve Exclusive when Ordering					Modified	00/00/00
Note			<input checked="" type="checkbox"/> 77						

Invoice Total	
	-2,603.64
GM %	-32.9

Invoice # S00020066-EX - BUTTON, BENJAMIN - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax	Status	QOH
Model	No	WFW8620HC		5.0 CU. FT., 14 CYCLES, 11 OPTIONS...	-1	-1,338.00	NYN		10/10
Warranty	No	ZY1499WS		Washers 2 Year \$1000-\$1499.99	1	60.99	NNN		
Model	No	WFW8620HC		5.0 CU. FT., 14 CYCLES, 11 OPTIONS...	1	1,338.00	NYN	Open	11/11
Warranty	No	ZY1499WS		Washers 2 Year \$1000-\$1499.99	1	60.99	NNN		

Item	Model	Labor	Misc	Comment	Warranty	Payment	Tax	Package	Signature
Model	WFW8620HC	5.0 CU. FT., 14 CYCLES, 11 OPTI		Ordered	1	L1	1,338.00	<input type="checkbox"/> Package	Trip# 1
Location		Main Stock		Shipped	0	Total	1,338.00	25.0	Spiff 0.00
SKU #		Serial	Location	QOH	10	Std. Cost	1,003.00		
Equiv				Not Avail	0				00/00/00
Brand	UNKOWN			QOO	10				
Product	PRICE LIST IMPDI	Color		Written	16				Status
Mfr Wty	0	Features		Inventory Type					Committed
PO #		Reference		<input type="checkbox"/> Auto Backorder					Created
Branch	Default	Commission		<input type="checkbox"/> Reserve Exclusive when Ordering					XYZ 1/16/2024
Note									Modified
									00/00/00

Commit Discont Serial Split Line Header Add Edit Delete Exit Add From Cart Invoice Total 0.00 GM % 0.0

You can now put the incorrect serial shipped, back into inventory by manually serializing the negative line.

Review Invoice # S00020066 - BUTTON, BENJAMIN - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax	Status	QOH
Model	No	WFW8620HC		5.0 CU. FT., 14 CYCLES, 11 OPTIONS...	1	1,338.00	NYN	Shipped	10/10
Warranty	No	ZY1499WS		Washers 2 Year \$1000-\$1499.99	1	60.99	NNN		
Model	No	WED6120HW		7.4 CUFT ELEC DRYER W/HAMPER...	1	1,000.00	NYN	Shipped	1/1
Warranty	No	ZY1499MA		Major Appliances 2 Year \$1000-\$1499...	1	40.99	NNN		
Payment		CASH			0	2,603.64	NNN	Committed	

Item	Model	Labor	Misc	Comment	Warranty	Payment	Tax	Package	Signature
Model	WFW8620HC	5.0 CU. FT., 14 CYCLES, 11 OPTI		Ordered	1	L1	1,338.00	<input type="checkbox"/> Package	Trip# 1
Location		Main Stock		Shipped	1	Total	1,338.00	25.0	Spiff 0.00
SKU #		Serial	Location	QOH	10	Std. Cost	1,003.00		
Equiv		64-93285	Main Stock	Not Avail	0				00/00/00
Brand	UNKOWN			QOO	10				
Product	PRICE LIST IMPDI	Color		Written	16				Status
Mfr Wty	0	Features		Inventory Type					Committed
PO #	1181	Reference		<input type="checkbox"/> Auto Backorder					XYZ 1/16/2024
Branch	Default	Commission		<input type="checkbox"/> Reserve Exclusive when Ordering					Modified
Note									00/00/00

Commit Discont Serial Split Line Header Add Edit Delete Exit Add From Cart Invoice Total 2,603.64 GM % 28.8

Invoice # S00020066-EX - BUTTON, BENJAMIN - Review Model

Type	Pack	Item	Loc	Description	Qty	Amount	Tax	Status	QOH
Model	No	WFW8620HC		5.0 CU. FT., 14 CYCLES, 11 OPTIONS...	Ordered	-1	Sold	0	
Warranty	No	ZY1499WS		Washers 2 Year \$1000-\$1499.99					
Warranty	No	ZY1499MA		Major Appliances 2 Year \$1000-\$1499...					

Item	Model	Labor	Misc	Comment	Warranty	Payment	Tax	Package	Signature
Model	WFW8620HC								Trip# 1
Location									0.00
SKU #		Serial	Location	QOH					
Equiv									
Brand	UNKOWN								
Product	PRICE LIST IMPDI	Color							Status
Mfr Wty	0	Features							Created
PO #		Reference							00/00/00
Branch	Default	Commission							00/00/00
Note									00/00/00

Serial	Loc	Return	Features	Received	Cost	Std. Cost	Taken	Status
64-93285					0.00	1,003.00	Taken	Taken
								1/16/2024
								Bin Location
								Barcode ID
								3VQFK287F
								Date Received
								3/3/2023
								Status
								Created
								00/00/00
								Modified
								00/00/00
								Return Reason


Commit Discont Serial Split Line OK Cancel



Note: It is always recommended to have both the original invoice and new invoice open at this time. You can copy the Serial Number from the original invoice by clicking it and highlighting it, you can then paste that Serial Number on the Negative Line of the exchange invoice.

Once the negative line is serialized. You can then ship the correct serial out and finish the invoice to be posted.

The screenshot shows the 'Review Model' window for Invoice # S00020066-EX. The main window contains a table with columns: Type, Pack, Item, Loc, Description, Qty, Amount, Tax, Status, QOH. The table lists a Model (WF8620HC) and a Warranty (2Y1499WS). A modal dialog titled 'Assign Serials to Invoice # S00020066-EX' is open, displaying a table of serials with columns: Serial, Std. Cost, Ordered For Inv, Loc, Bin Loc, Received, Floor Due, Features, Bar. The serial 849032489034 is selected and highlighted in blue. A red circle '2' is placed over this row. At the bottom of the dialog, there are 'OK' and 'Cancel' buttons, with a red circle '3' over the 'OK' button. In the background, a 'Commit' button is visible with a red circle '1' over it.

 **Note:** If needing to Update the Serial as it was entered incorrectly at the time of receiving. Please do so before putting that Serial back on the exchange invoice. (Update Serial will be done with the scan gun, you can then scan it out to ship and finish the invoice)

Option 2

Edit Customer History – Not Recommended if appliance is sold with Warranty

Go into Customer Maintenance, Search for Customer, Select History Button, Select Edit

The screenshot shows the 'Customer' window with search options and a list of records. A red circle '1' highlights the search criteria. A second window, 'History for Customer: NEW, NEW LAST - Review Sales', is open, showing a table of sales records. A red circle '2' highlights the 'Add' button in the main window. A red circle '3' highlights the selected record in the table. A red circle '4' highlights the 'Edit' button in the detailed view below the table.

Customer #	Finish Date	Invoice #	Type	Inv.Type	Model	Serial	Sale Amount	Reference	Note
NEW	2024-01-11	S00020063	Sales	SA			37.54		
NEW	2024-01-11	S00020063	Sales	SA	WED8620HC	9532493	1,338.00		

Sales | Warranty | Service | Miscellaneous | Comment

Invoice: S00020063 Invoice Type: SA SALES INVOI Salesperson: MG MONICA GELLAR
 Model: WED8620HC 7.4 CU. FT., 13 CYCLES, 8 OPTIC Brand: UNKOWN
 Serial: 9532493 Reference: Product: PRICE LIST IMPORT
 Equipment #: Bill To: Branch: Default Appliance Sales & Service
 Run Number: Quantity: 1 Features:
 Sale Amount: 1,338.00 Note:
 Cost Amount: 0.00
 Del / Finish Date: 1/11/2024 1/11/2024

Models | View Invoice | Print | Add | Edit | Delete | Excel | Exit

After selecting Edit, you can then manually edit the serial number that was shipped to the customer

The screenshot shows the 'History for Customer: NEW, NEW LAST - Edit Sales' window. The serial number field in the detailed view is highlighted in blue, indicating it is selected for manual editing.

Customer #	Finish Date	Invoice #	Type	Inv.Type	Model	Serial	Sale Amount	Reference	Note
NEW	2024-01-11	S00020063	Sales	SA			37.54		
NEW	2024-01-11	S00020063	Sales	SA	WED8620HC	9532493	1,338.00		

Sales | Warranty | Service | Miscellaneous | Comment

Invoice: S00020063 Invoice Type: SA SALES INVOI Salesperson: MG MONICA GELLAR
 Model: WED8620HC 7.4 CU. FT., 13 CYCLES, 8 OPTIC Brand: UNKOWN
 Serial: 9532493 Reference: Product: PRICE LIST IMPORT
 Equipment #: Bill To: Branch: Default Appliance Sales & Service
 Run Number: Quantity: 1 Features:
 Sale Amount: 1,338.00 Note:
 Cost Amount: 0.00
 Del / Finish Date: 1/11/2024 1/11/2024

Models | OK | Cancel

