

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

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Maintenance	III 🖗 🗐 🖳 🕼 🕼 🕼 🖉 III 😵 💷
Scan Serial	
Serial	
Purchase	
Written	
Transfer	
Transfer Requests	
Update Model	
Update Key	
Supplier Price List	🕒 Serial Sales 📃 🗉 🎫
Color Channer	Search Options Click here to make this your default Search
Sales Changes	Search For By Invoice Matching Start of Field
Wireless Inventory	Search
Reports 1	AND V For By Model V Matching Start of Field V
Reports 2	Model Description Serial # Loc Invoice # Sold To Date Sold Cost List Returned
Utilities •	
oundes .	
	Record Count



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

B→ Serial Sales		- • •
Search Options	Click here to make this your default Search	
Search For \$00020063	By Invoice Matching Start of Field	▼ Search
AND V For	By Model Matching Start of Field	
Model Description Serial #	Loc * Invoice # Sold To Date Sold Cost S00020063 NEW 1/11/2024 0.00 13	List Returned
Record Count		
1	<u>R</u> eview <u>E</u> dit	E <u>x</u> it

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



8	e Edit Serial Sales:	9532493 for Model WED862	0HC, 7.4 CU. FT., 1	3 CYCLES, 8 OPTIONS, 5 TE
Γ	Model	WED8620HC	7.4 CU. FT., 13 CY	CLES, 8 OPTIONS, 5 TEMPER/
	Serial #	9532493	Returned	Rental OK
	Invoice #	Code 8532,592,3	al Cost	0.00 Cancel
	Sold To Customer	859428523-0523	ht Amount	0.00
2	Date Sold			0.00
	Date Delivered			1,338.00
	Supplier Invoice		sperson 1	MG MONICA GELLAR
	Freight Invoice #		Salesperson 2	
	PO #	1181	Location	Main Stock
	Date Received	3/3/2023	Brand	XX UNKOWN
	Floor Plan		Product	XX PRICE LIST IMPORT
	Floor Due	3/3/2023	New / Used	New
	Trust Document		Supplier	MISC
	Trust Line #	0	Modified	XYZ 1/11/2024
Г	Features			A
		I	* *	•

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.



20.0		
Search Uptions	Click here to make this your default Search	
Search For 20066	By Invoice # Matching End of Field -	Search
AND - For 00/00/00	By Schedule Date Matching Equal	Status All
AND There is a Model Code.	Of Matching Equal	
Include Guote Yes Yes Yes Yes Konstein Tree Source # Customer #	Name Address Sched Date Status Inv Typ BUITTON BENIAM 1235 HERAI Finished SA	ve SP Total Balance Job Status Map Zone PO # MG 2603.64 0.00 FINISHED DEI
Status \$300020066-EX 4169082693	BUTTON BENJAM 1235 HERAL Open SA	MG -2603.64 -2603.64 FINISHED DEL
Invoice Type		
- Salesperson		
Record Count		
2 Print Detail Review	Add Edit Multi Edit Muti Edit	Delete Excel Exit
	Fields	
B Invoice # S00020066-EX - BUTTON, BENJAMIN	- Review Model	
Type Pack Item Loc	Description Qty /	Amount Tax Status QOH
Model No WFW8620HC Warrantu No 2Y1499W/S	 5.0 CU, FT., 14 CYCLES, 11 OPTIONS -1 -1,2 Washers 2 Year \$1000.\$1499 99 1 	338.00 NYN Committed 10/10 -60.99 NNN
Model No WED6120HW	7.4 CUFT ELEC DRYER W/HAMPER,1 -1,	00.00 NYN Committed 1/1
Warranty No 2Y1499MA	Major Appliances 2 Year \$1000-\$1499 1	-40.99 NNN
ltem <u>M</u> odel Labor	Mi <u>s</u> c <u>C</u> omment <u>W</u> arranty <u>P</u> ayment	<u>Iax</u> Pac <u>k</u> age Signature
WOOD WEDG120HW 7.4 COFT ELEC DF		
Location Main Stock	Shipped 0 Total	-1,000.00 -31.5 Spitt 0.00
SKU # Serial Lo	cation QOH 1 Std. C	ost 685.00
Equiv	Not Avail 0	
Brand UNKOWN	<u>Q00</u> 1	,
Product PRICE LIST IMPOF Color		Status
Mfr Wty	Inventory Type	Created
PO # Reference		XYZ 1/16/2024
Branch Default Commission	Records Evaluation when Ordering	Modified
	In theserve Exclusive when Urdering	00/00/00
Note		
	1	
Dennis Discourt 1		- Invoice Total
Commit Discount		
Serial Split Line Header Add	Edit Delete Exit Add From C	art .2,603.64



🖘 Invoice # SOO	0020066-EX - BUT	ITON, BENJAN	MIN - Review	v Model						
Type Pa	ack Item		Loc Descrip	otion		Qty /	Amount Tax	Status	QOH	
Model N	No WFW8620H0	2	5.0 CU	. FT., 14 CYCLES,	11 OPTIONS	-1 -1;	338.00 NYN		10/10	
Model N	No 201499WS No WFW8620H0		Washe 5.0 CU	rs 2 Year \$1000-\$1 . FT., 14 CYCLES.	499.99 11 OPTIONS	1 1	-60.99 NNN 338.00 NYN	Open	11/11	
Warranty N	No ZY1499WS		Washe	rs 2 Year \$1000-\$1	499.99	1	60.99 NNN			
<u>l</u> tem	<u>M</u> odel	Labor	Misc	<u>C</u> omment	<u>W</u> arranty	<u>P</u> ayment	<u>I</u> ax	Pa	ac <u>k</u> age	Signature
Model	WFW8620HC	5.0 CU. FT.,	14 CYCLES, 11	Ordered	1	L1	▼ 1,338.00	🔲 Pack	age Tr	ip# 1
Location		Main Stock		Shipped	0	Total	1,338.00	25.0	Spiff I	0.00
SKU # [Equiv [Serial	Location	QOH Not Avail	10	Std. C	ost 1,003.00		00/00/00	•
Brand	UNKOWN			<u>QOO</u>	10			Charles		
Product I	PRICE LIST IMPOF	Color		▼ Written	16			Com	s mitted	
Mfr Wty	0	Features		Inventory T	ype			Jeom	Created	
P0 #		Reference		Auto Ba	ckorder			XYZ	1/16/2	024
Branch	Default	Commission		Reserve	e Exclusive wher	Ordering			Modified	00
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Commit Se <u>r</u> ial	Disc <u>o</u> unt Split Li <u>n</u> e	<u>H</u> eader	<u>A</u> dd <u>E</u> c	it <u>D</u> elete	E <u>x</u> it	Add From C	art IIIIIII		1 <u>voice Total</u> 0.00 1M % 0.00	ī ī

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

Review Invoice # \$00020066 - BUTTON, BENJAMIN - Review Mod	lel 🗖 🗖	INVOICE # S00020066-EX - BUTTON, BENJAMIN - Review Model	
Type Pack. Item Lo Description Model No WFV9820HC 50 CU.FT14 CV. Model No WFV9820HC 50 CU.FT14 CV. Model No WF1493WS Wathers 2Yeas Model No WED6120HV 7 CUFFTELED Waranty No 2/1493MA Major Appliances / Payment CASH Major Appliances /	Oty Amount Tax Statu QOH CLES_110PTING 1.3300 NNN Sheped 10/10 10003419393 1.50.39 NNN NNN 10/10 PFEW VrAMEFE_m. 1.00.00 NN Sheped 1/1 2Yeer\$1000_\$1495 1 40.09 NNN 0 2.593.54 NNN Committed	Type Pack Item Loc Description Dity Amount Tax Status QDF Model Model VPFV9520 1 Invoice € 50020066-EX Add Implement	
Item Model Labor Migc Comm Model UPWess2exc [50 OU, FT, 14 CYCLES, 11 OPT) Ord Ord	erk Warrenty Beyment I.ax Package Sign ered 1 [L1 ♥ 1,338,00 Package TripH] pped 1 Total 1,388,00 Package TripH H 10 Std. Cost 1,003,00 Q 10 USANA Q 10 Status entroy Type Status Even 16 Constitution (Constitution (Cons	ure Image: Serial series serial s	signatue pe# 1 0:00 0:00 0:00 0:00 0:00 0:00 0:00 0:

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.

Invoice #	S00020	066-EX	- BUTTON, B	enjam	IIN - Rev	view Mo	del								
Гуре	Pack	Item			Loc De:	scription				Qty	Amount	Tax	Statu	s QOI	н
vlodel	No	WFW8	620HC		5.0	CU. FT.,	14 CYCLE	S, 11 OPTION	۹S	-1	-1,338.00	NYN		11/	11
Marranty dental	No	2Y149	9WS Iepoulo		Wa	shers 2 \	rear \$1000)-\$1499.99 C. 11 ORTION	JC.	1	-60.99	NNN	0	11.2	11
viouei Marrantu	No	2Y149	9w/S		0.0 Wa	shers 25	. 14 CTCLD Cear \$1000	.5, 11 OF HUR)-\$1499 99	чэ	1	60.99	NNN	open	- 117	11
	63	nvoice	Serials for Mo	del WF	W8620HC.	Invoice	# S00020)66-EX - Add					×		
	_	_								_		_			
	Mo	del W	FW8620HC		5.0 CU. I	FT., 14 C	YCLES, 1	1 OPTIONS, §	Orde	red	1 Sold	()		
		Serial			Return Feat	tures		Received	Cost	Std. Co	st Taken	Is	tatus		
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ltem														Package	Signature
Assicu	n Serial	s to Inv	oice # \$0002	1066-E)	¥							_			
CJ: Assign	n sena	3 10 1110	0102 # 30002	5000-L7	`										Trip# 1
Serial			Std. Cost	Ordere	ed For Inv	Loc	Bin Loc	Received	Flo	oor Due	Feat	ures		Bar	
428930	0489-28	34	1003	1028				3/3/2023	3/	3/2023				370	0.00
583022	2		1003	1028				3/3/2023	3/	3/2023				37(-
84-32-4	4893248	3	1003	1028				3/3/2023	3/	3/2023				370	
84-932	285		1003					3/3/2023	3/	3/2023				3V(
849-32	2-24	6	1003	1028				3/3/2023	3/	3/2023				371	
✓ 84903.	2483034 0400	<u>۲</u>	1003	1028				3/3/2023	3/	3/2023				371	
052200	8423 10702	-	1003	1028				3/3/2023	3/	3/2023				370	
8530.2	40233		1003	1020				3/3/2023	3/	3/2023				300	/2024
	.10			1020				0/0/2020		0, 2020			_	010	
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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



E sales@epass.software

Customer		
- Search Options Click here	to make this your default Search	
Control For Junio		
Search Foil new by Account #	🔁 History for Customer: NEW, NEW LAST - Review Sales 📃 💷 📧	
AND For By Last Name	Customer # Finish Date Invoice # Tune Inv Tune Model Serial Sale Amount Reference Note	
Account # Last Name	NEW 2024-01-11 S00020063 Sales SA 37.54	Date Modified
E- Last Name	NEW 2024-01-11 S00020063 Sales SA 🚺 WED8620HC 9532493 1,338.00	Date modified
User CreatedNEW0725 NEW 0725		
	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 W 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	
- Record Count		
2 History Beview Add Edit	Delete Copy Excel Credit Exit	

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

B History for Cust	omer: NEW,	NEW LAST	- Edit Sales					
Customer # Fin	ish Date Ir	nvoice #	Type In	iv.Туре	Model	Serial	Sale Amoun	t Reference Note
NEW 202 NEW 201	24-01-11 9 24.01.11 9	00020063	Sales Si Sales Si	А А	WED8620HC	9532493	37.54	
Sales		Warrar	nty Y	Se	rvice	Miscellar	neous Y	Comment
Invoice		S00020063	Invoice Type	SA 🔄	SALES INVOI	Salesperson	MG	MONICA GELLAR
Model	WED8620	HC 7.4	CU. FT., 13 C	YCLES, 8 OI	PTIC	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	1/1	1/2024					Ŧ
	Models			OK	Ca	incel		



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