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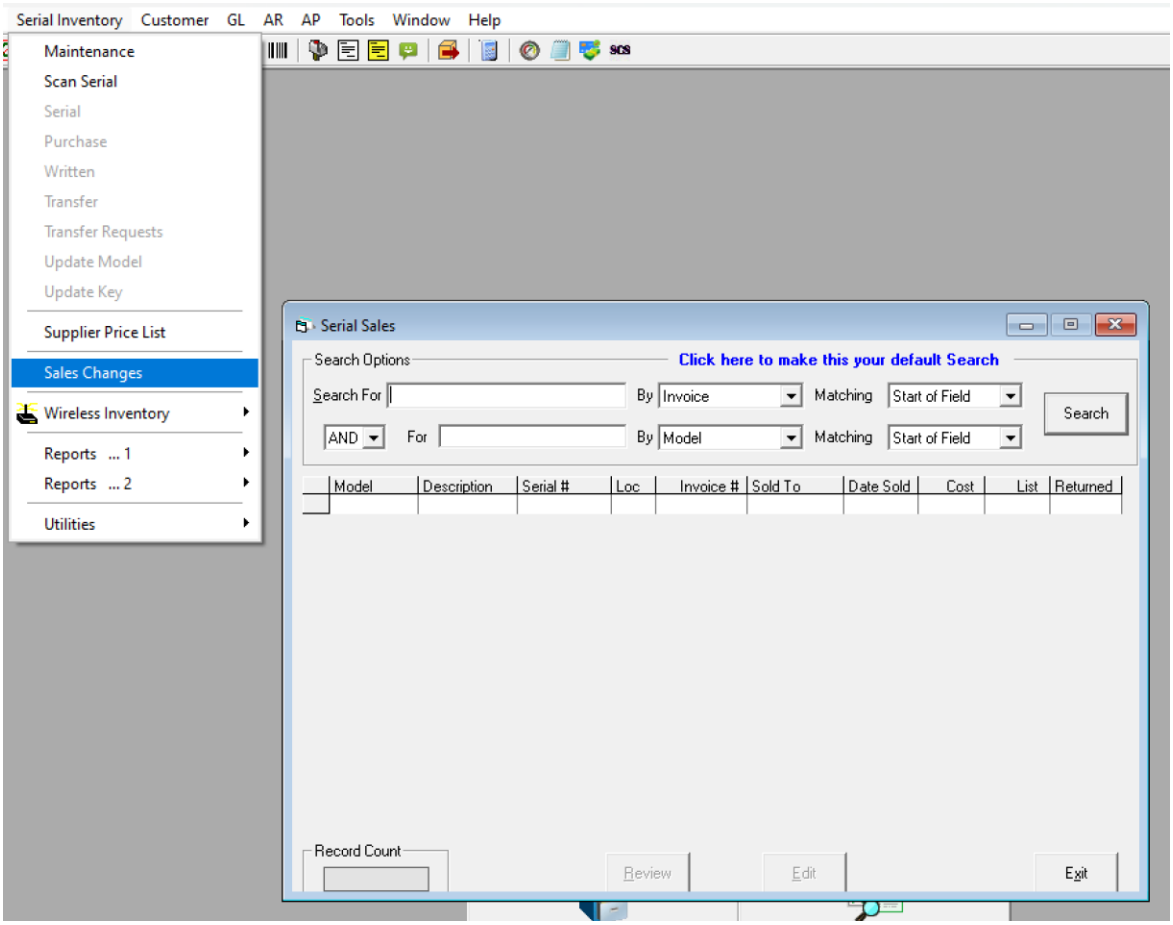
How to Edit an Incorrect Shipped Serial:

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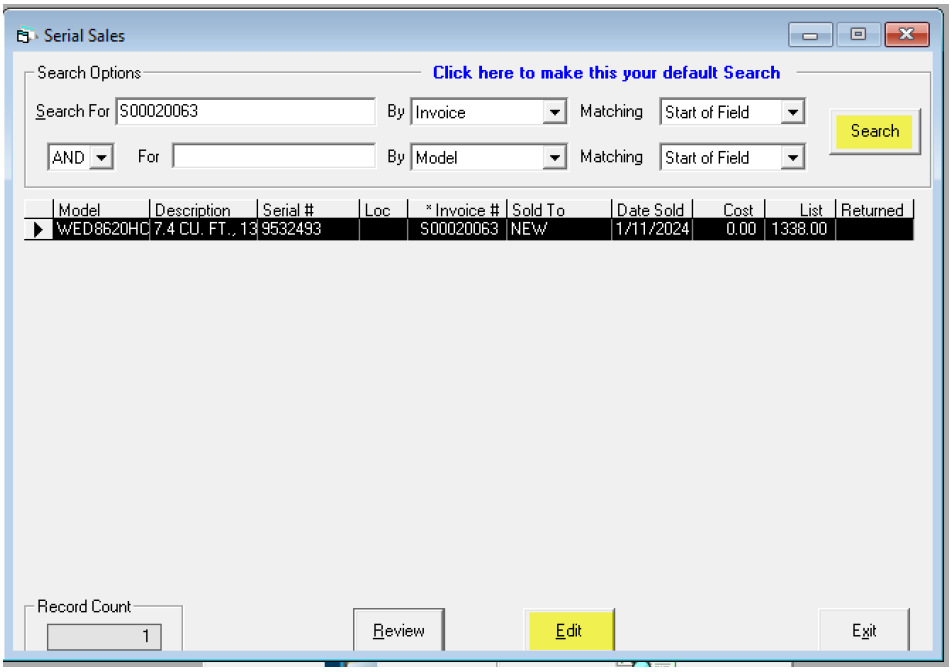
You would then search for the Invoice that was incorrect and select edit



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

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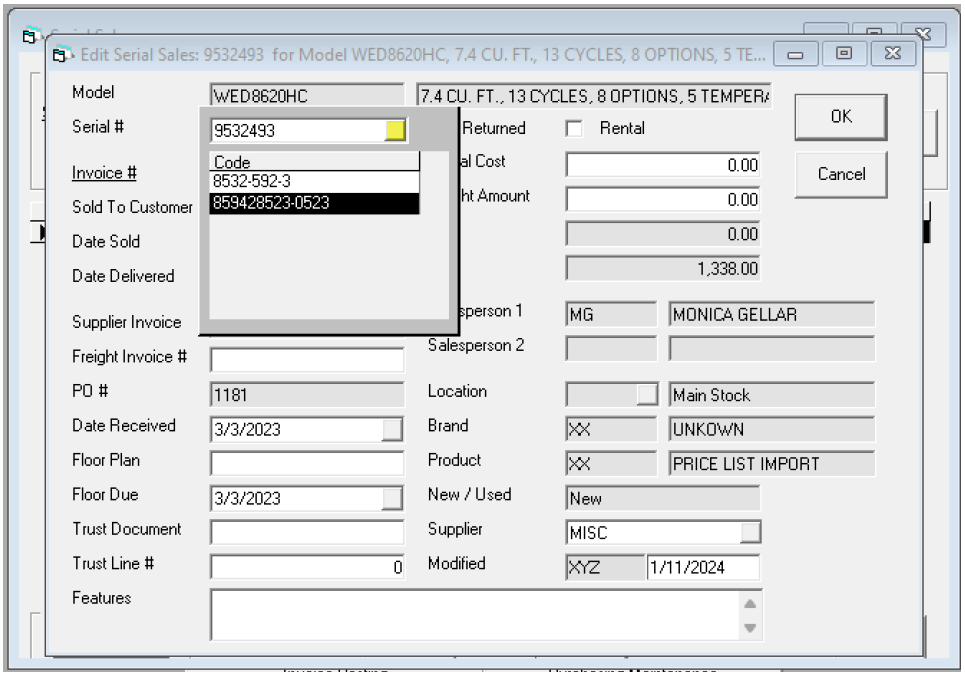


Note: After the Sales Change is complete, please check Barcode Labels on Hand. A new inventory label may need to be re-printed.

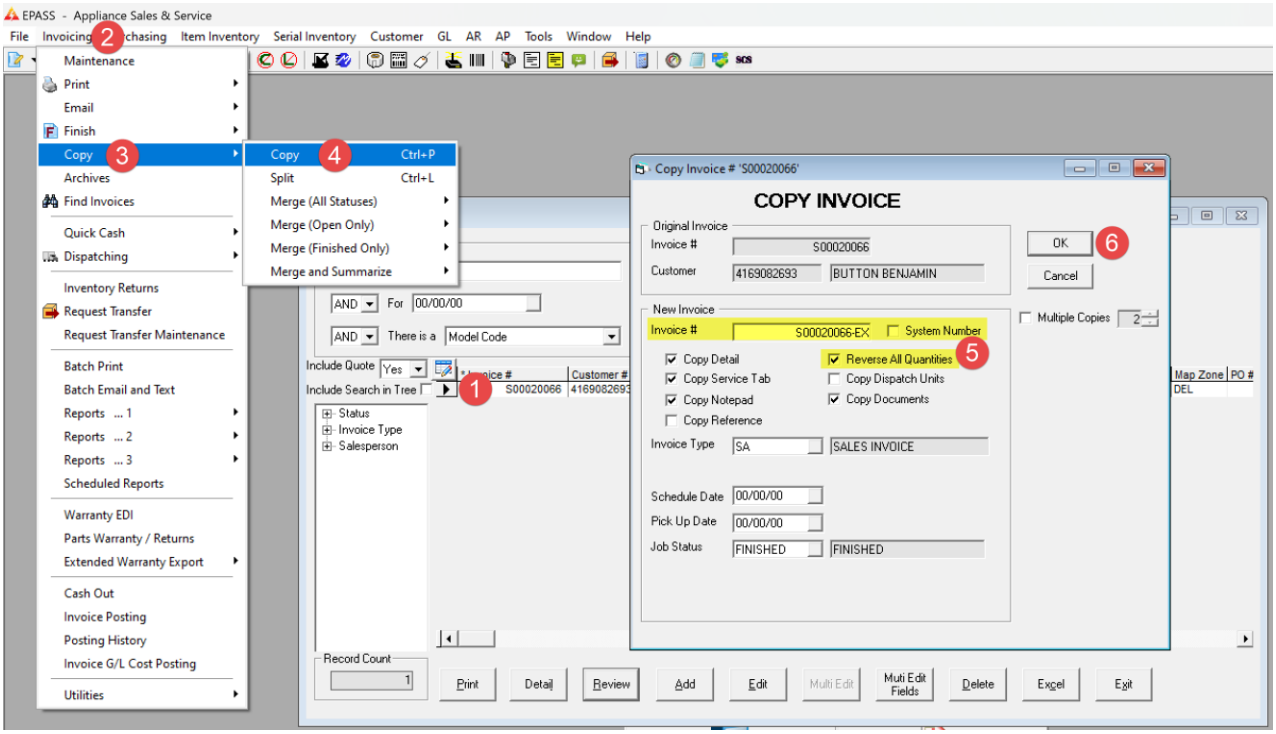
Scenario 2:

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.

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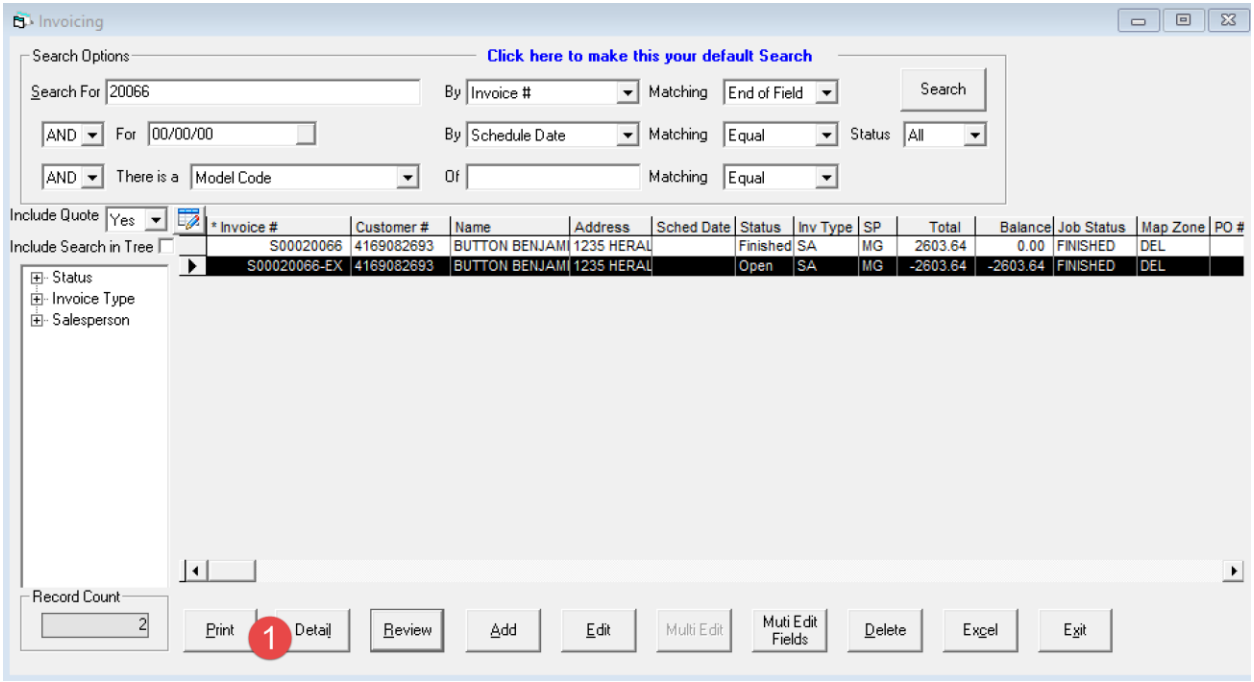
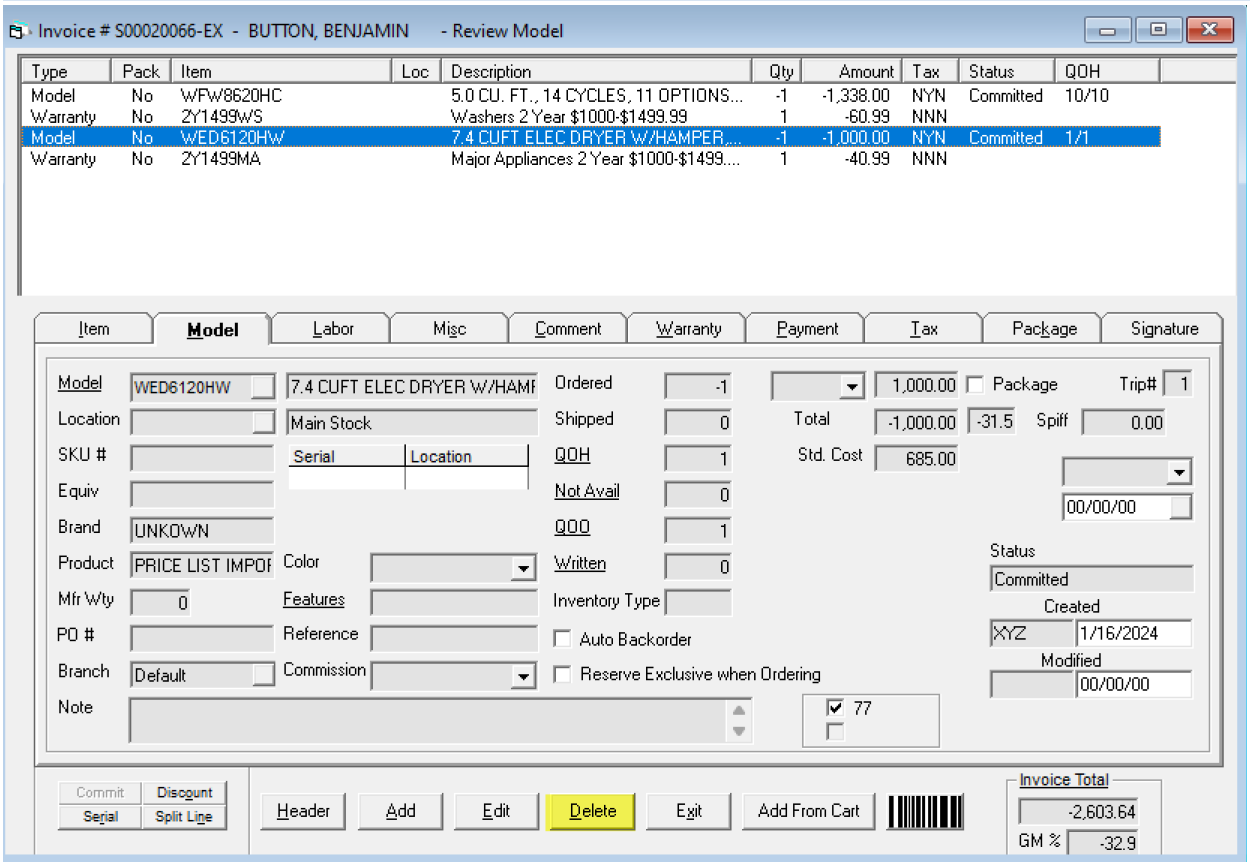
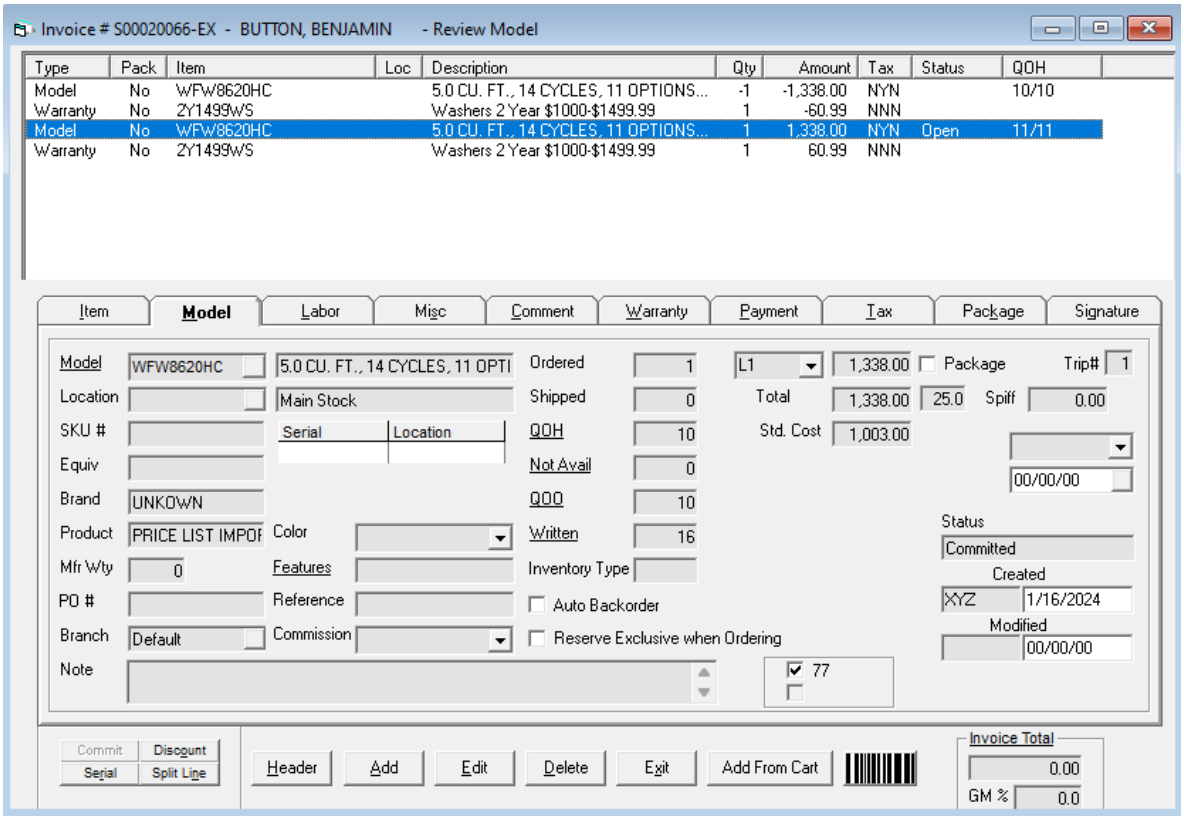
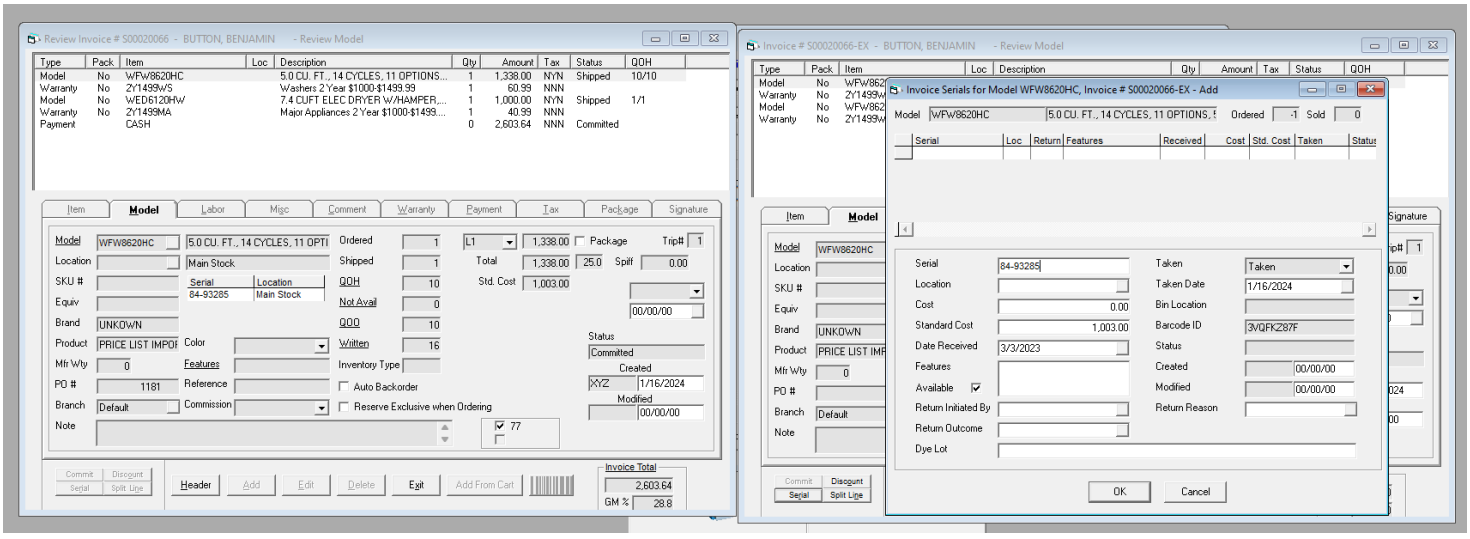






You can now put the incorrect serial shipped, back into inventory by manually serializing the negative line.



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.

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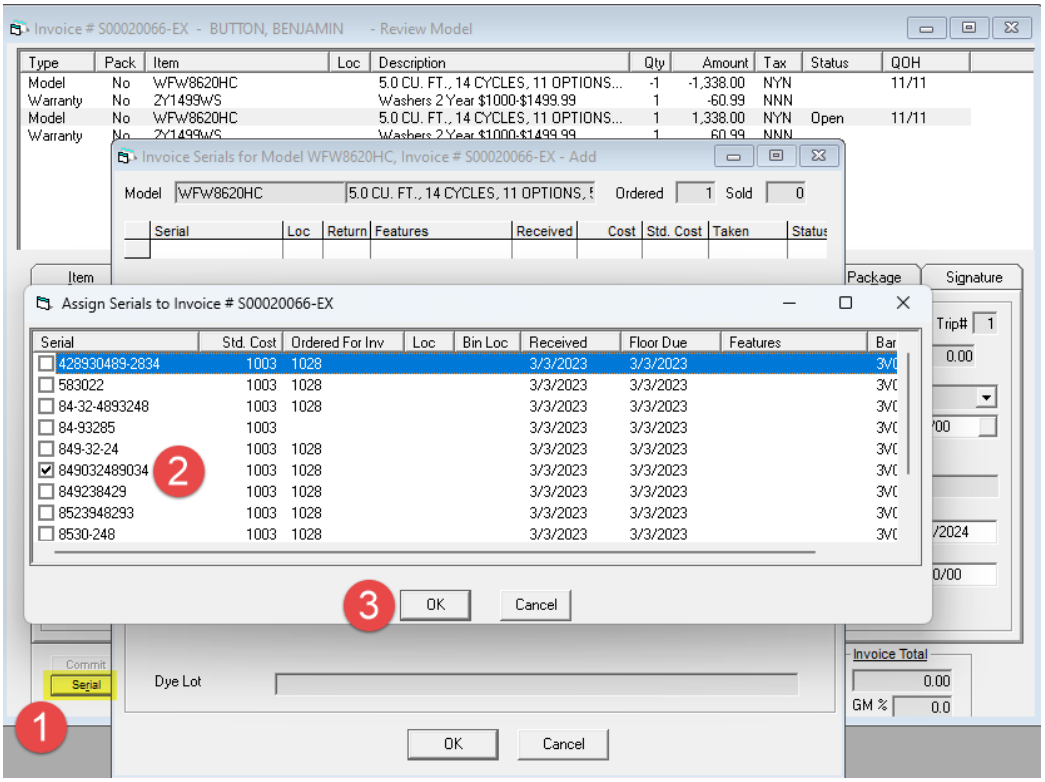
Once the negative line is serialized. You can then ship the correct serial out and finish the invoice to be posted.



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

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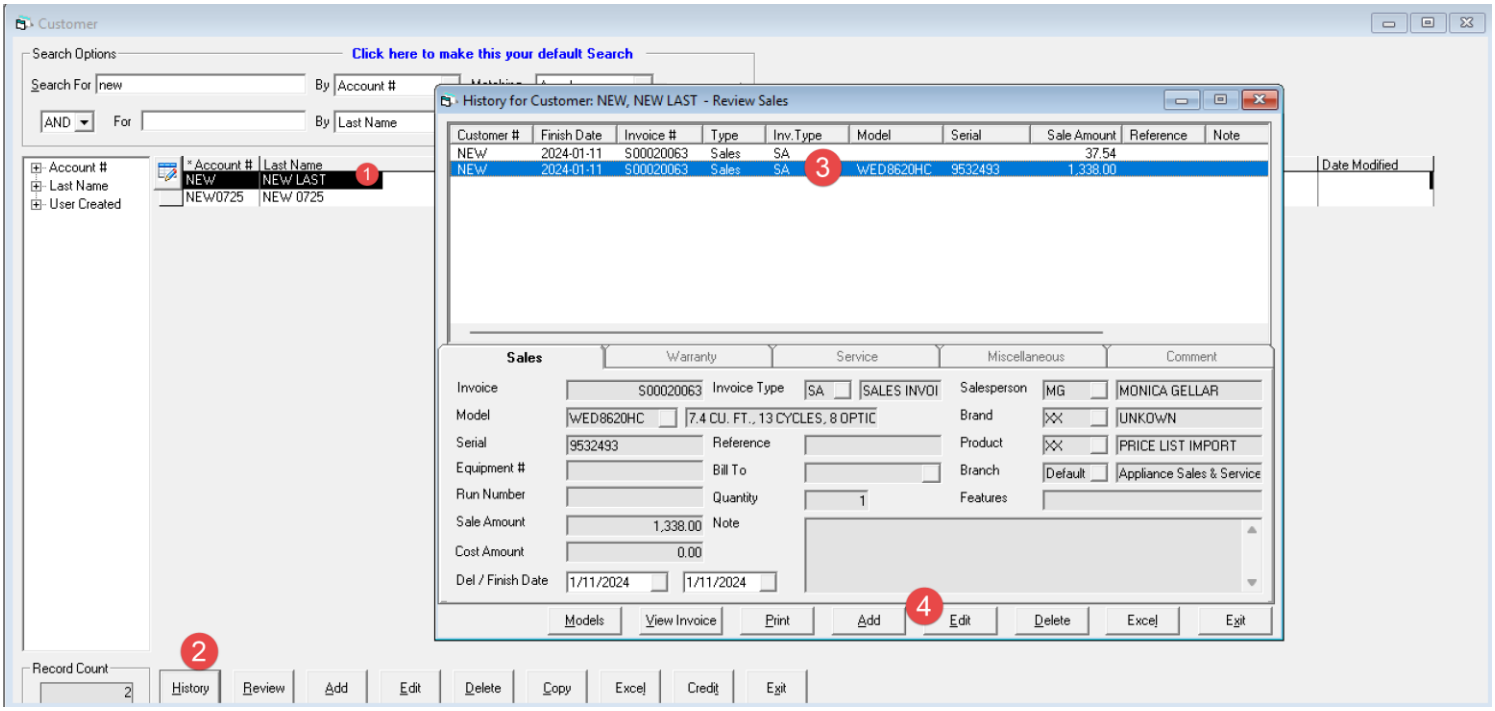
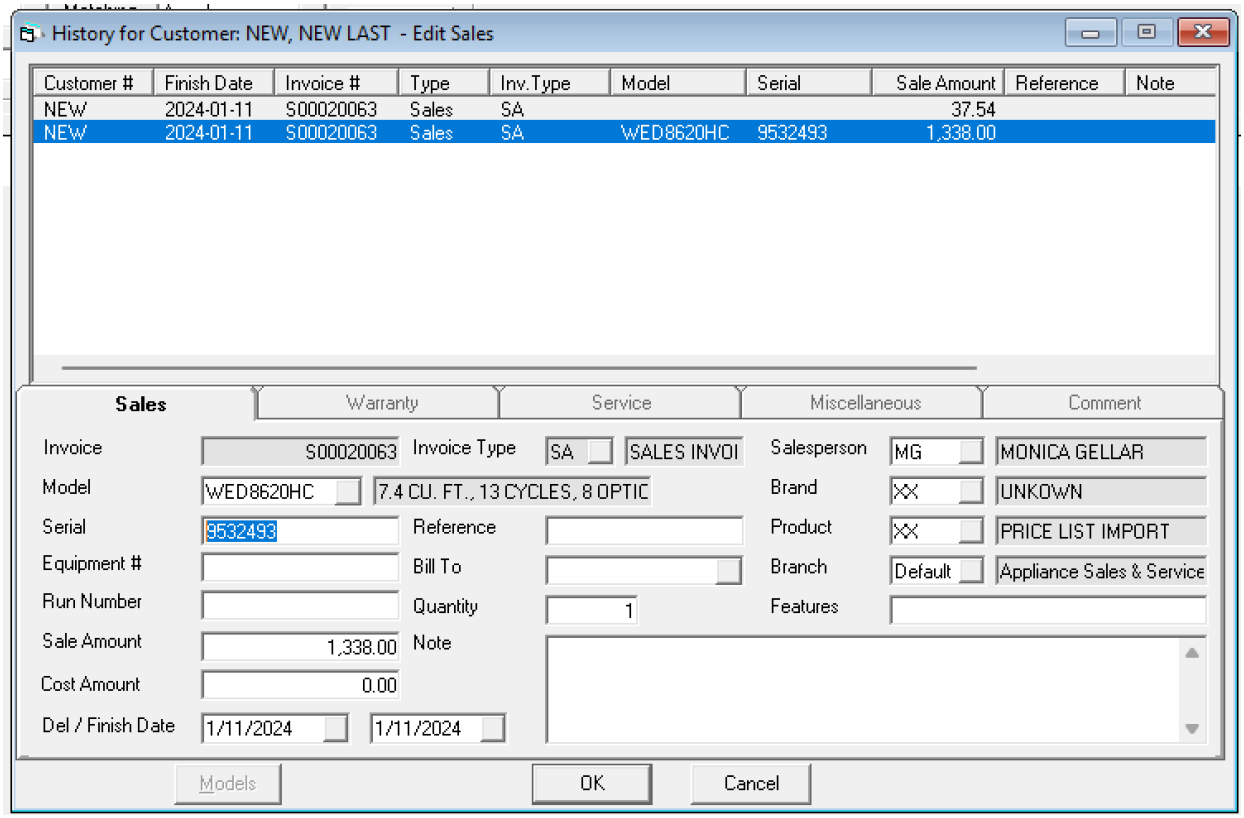


After selecting Edit, you can then manually edit the serial number that was shipped to the customer



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