



# Serialization Goes Wireless With Paladin and an RF Unit

Charles Owen

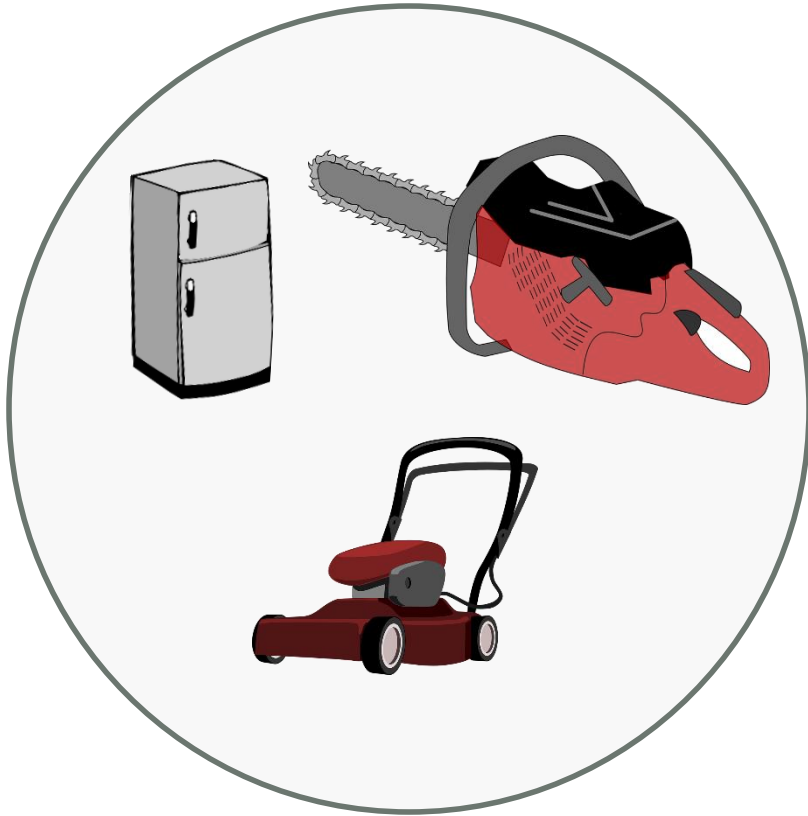
*Chief Experience Officer*

July 16, 2024

# **WHAT YOU'LL LEARN**

- What is product serialization?
- Common scenarios
- How serialization works in Paladin
  - Identifying serialized items
  - Receiving serialized items
  - RF Unit receiving serialized items
  - Selling serialized items
  - Managing serial numbers
  - Serial Number List report
  - Multi-store serialized item transfers

## What is product serialization?



Product serialization is the process of assigning unique IDs or “serial numbers” to individual items in a product line.

Serial numbers are typically used for high-value products, such as power equipment, chainsaws, power tools, and appliances.

## Common serialization scenarios



Serial numbers are useful in many scenarios including:

- Managing warranty coverage
- Maintaining ownership records
- Supplier traceability & reporting
- Enhanced accountability



## How serialization works in Paladin

The Paladin serialization feature lets you maintain and track serial numbers for any product in your store.

- **PO Receive:** Serial numbers are added when items are received. *Now available using the RF Unit 15-line display during the RF PO Receiving process.*
- **Invoice/Quote:** When a serialized item is sold or returned, the cashier is required to specify the serial number before the transaction can be completed.
- **Inventory:** A current list of in-stock serial numbers and a detailed serial number history, and status is maintained for each inventory item.
- **Reports:** View a complete list of your serialized products and all their serial numbers in Paladin, including current serial number disposition, state, and status.

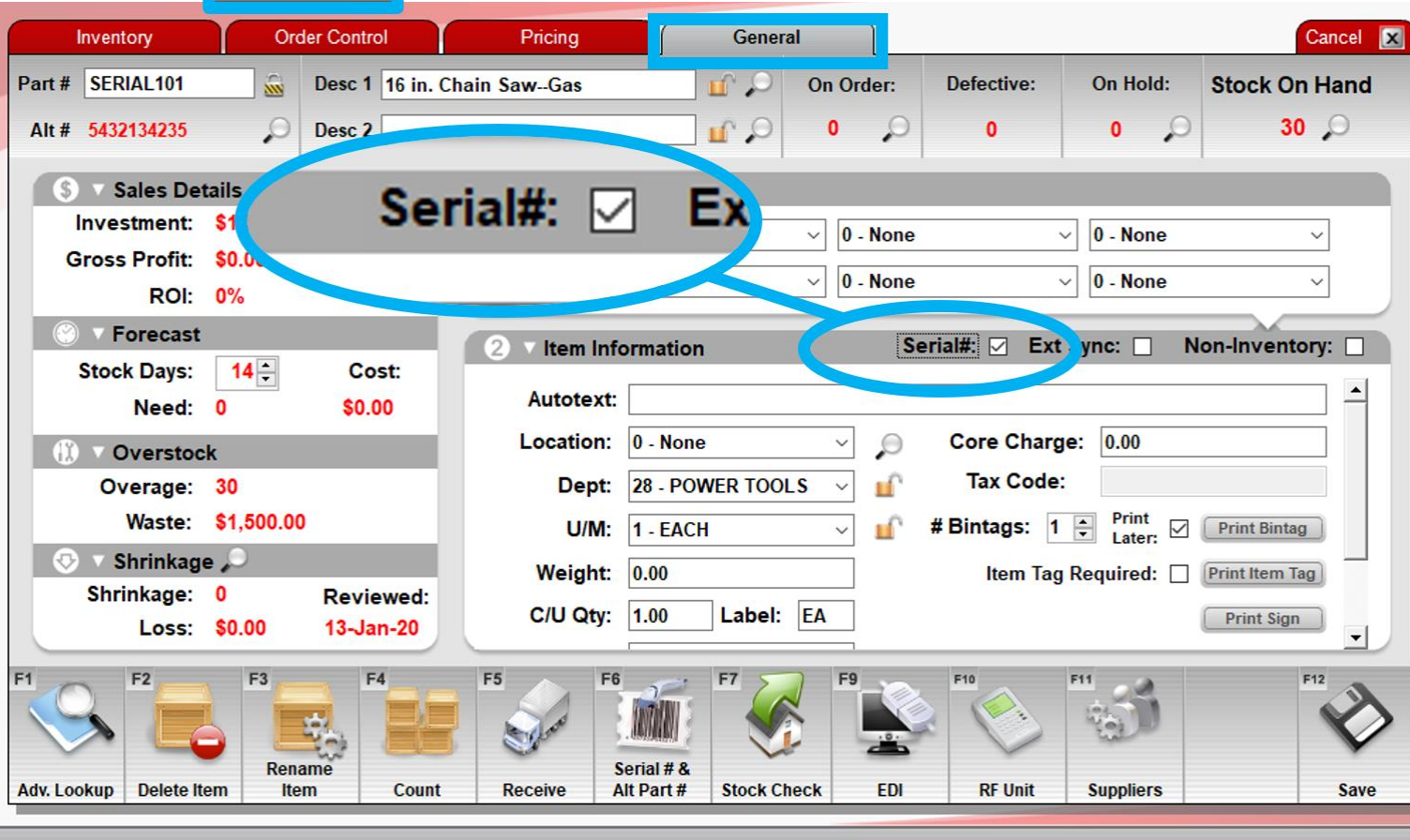
## How serialization works in Paladin

- Paladin has incorporated multiple safeguards to help you maintain exactly one serial number for each serialized item in your inventory.
- Paladin prevents you from adding duplicate serial numbers to an item.
- Paladin maintains a detailed serial number history for every serial number event and status change.
- Paladin tracks not only the serial number, but also the date received and receiving cost of each serialized item.

Identifying serialized items

Inventory module

## Identifying serialized items in your inventory

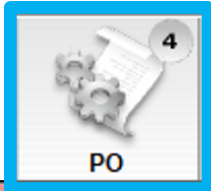


The screenshot shows the 'General' tab of an inventory management software interface. The 'Serial#' checkbox is checked and circled in blue. The 'Ext. Sync' checkbox is also checked and circled in blue. The 'Non-Inventory' checkbox is unchecked. The 'Item Information' section includes fields for Autotext, Location, Dept, U/M, Weight, C/U Qty, Label, Core Charge, Tax Code, # Bintags, and Item Tag Required. The 'Sales Details' section includes fields for Investment, Gross Profit, and ROI. The 'Forecast' section includes fields for Stock Days, Need, and Cost. The 'Overstock' section includes fields for Overage and Waste. The 'Shrinkage' section includes fields for Shrinkage and Loss. The 'Inventory' tab is selected, and the 'General' tab is active. The 'Part #' is SERIAL101, 'Desc 1' is 16 in. Chain Saw--Gas, and 'Stock On Hand' is 30. The 'Alt #' is 5432134235. The 'On Order', 'Defective', and 'On Hold' counts are all 0.

To identify a product as a serialized item, in the **Inventory** module, on the **General** tab, select the **Serial#** checkbox.

Receiving items with serial numbers

PO module



## Receiving items with serial numbers

Receive PO
Confirm Receive
Cancel

PO # 
 Supplier

Address 2 
 Phone

EDI 
 Address 1

City/State/Zip 
 Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH 10	3	\$ 50.000	\$ 150.00
	SERIAL101	Old Cost: \$50.000    Old Sell: \$160.00    Mar: 69% Ref Mar: 00%        New Sell: \$160.00    Mar: 69%		SERIAL #		
<input type="checkbox"/>	PART1	HAMMER	EACH 40	40	\$ 10.000	\$ 400.00
	PART1	Old Cost: \$10.000    Old Sell: \$20.00    Mar: 50% Ref Mar: 00%        New Sell: \$20.00    Mar: 50%		0		
<input type="checkbox"/>	SERIAL102	20,000 BTU PORTABLE A/C	EACH 5	5	\$ 150.000	\$ 750.00
	SERIAL102	Old Cost: \$150.000    Old Sell: \$300.00    Mar: 50% Ref Mar: 00%        New Sell: \$300.00    Mar: 50%		SERIAL #		
<input type="checkbox"/>			ORD			
			REC			

Advanced  
Lookup

Add  
Note

Zero Qty  
Received

Displaying  
Open | All

Recall  
Inventory

Find PO

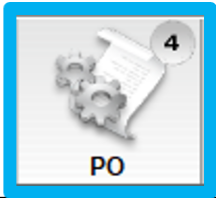
Review  
RF Receiving

Process

**Total \$ 1,300.00**

In the **PO** module, when you receive serialized items, you must add serial numbers before you can process the PO.

- A red **Serial #** warning indicates that the PO item needs serial numbers.



## Receiving items with serial numbers

Receive PO Confirm Receive Cancel

PO # 1234 Supplier 12 - MY BEST SUPPLIER Address 2 Phone  
 EDI Address 1 100 Main Street City/State/Zip Baltimore, MD, 21279-1047 Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input checked="" type="checkbox"/>	SERIAL101	16 in. Chain Saw—Gas	EACH 10	3	\$ 50.000	\$ 150.00
	SERIAL101	Old Cost: \$50.000 Mar: 00%	0	SERIAL #		
<input type="checkbox"/>	PART1	20,000 BTU	40	40	\$ 10.000	\$ 400.00
	PART1	Old Cost: \$10.000 Mar: 00%	0			
<input type="checkbox"/>	SERIAL102	20,000 BTU	5	5	\$ 150.000	\$ 750.00
	SERIAL102	Old Cost: \$150.000 Old Sell: \$300.00 Mar: 50% Ref Mar: 00% New Sell: \$300.00 Mar: 50%	0	SERIAL #		
			ORD			
			REC			

F1 Advanced Lookup F2 Add Note F3 Zero Qty Received F4 Displaying Open | All F5 Recall Inventory F6 Find PO F7 Review RF Receiving F8 Process

Total \$ 1,300.00

You can add, edit and view serial numbers using the quick access (right-click) menu.

- **Add Serial #:** Opens the **Add/Remove Serial Numbers** window.
- **Find Next Serial # Warning:** Moves to the next PO item that needs serial numbers.



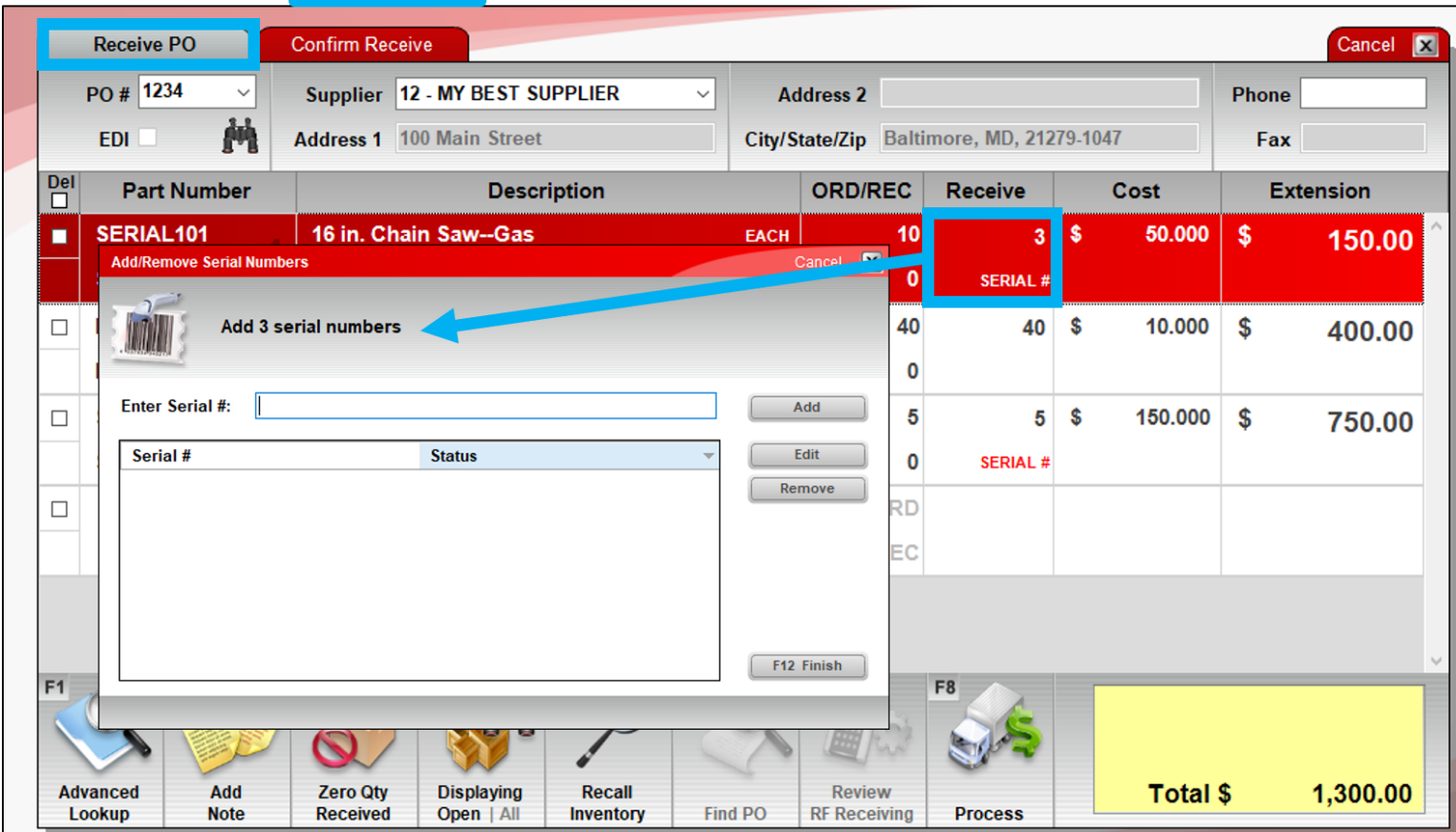
## Receiving items with serial numbers

Right-click a serialized item and select **Add Serial #** to open the **Add/Remove Serial Numbers** window.

Enter or scan serial numbers to add them to the item.

As you add serial numbers, the required number in the message decreases:

Add ## serial numbers.



Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input checked="" type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH 10	3	\$ 50.000	\$ 150.00
<input type="checkbox"/>			40	40	\$ 10.000	\$ 400.00
<input type="checkbox"/>			0			
<input type="checkbox"/>			5	5	\$ 150.000	\$ 750.00
<input type="checkbox"/>			0			

**Total \$ 1,300.00**



# Receiving items with serial numbers



Receive PO
Confirm Receive
Cancel

PO # 1234

EDI

Supplier 12 - MY BEST SUPPLIER

Address 1 100 Main Street


Address 2

City/State/Zip Baltimore, MD, 21279-1047


Phone

Fax


Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH 10	3	\$ 50.000	\$ 150.00
	SERIAL101	Old Cost: \$50.000 Ref Mar: 00%		SERIAL #		
<input type="checkbox"/>	PART1	HAMMER	EACH 40	40	\$ 10.000	\$ 400.00
	PART1	Old Cost: \$10.000 Old Sell: \$20.00 Mar: 50% Ref Mar: 00% New Sell: \$20.00 Mar: 50%	0			
<input type="checkbox"/>	SERIAL102	20,000 BTU PORTABLE A/C	EACH 5	5	\$ 150.000	\$ 750.00
	SERIAL102	Old Cost: \$150.000 Old Sell: Ref Mar: 00% New Sell:		SERIAL #		
<input type="checkbox"/>			ORD			
			REC			

F1 


Advanced  
Lookup

F2 


Add  
Note

F3 


Zero Qty  
Received

F4 


Displaying  
Open | All

F5 


Recall  
Inventory

F6 

Find PO

F7 

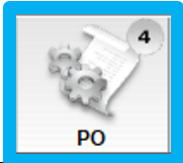
Review  
RF Receiving

F8 

Process

**Total \$ 1,300.00**

When the required serial numbers are entered for an item, the **Serial #** label turns from red to black.



# Receiving items with serial numbers

Receive PO
Confirm Receive
Cancel x

PO #

Supplier

Address 2

Phone

EDI

Address 1

City/State/Zip

Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH 10	7	\$ 50.000	\$ 350.00

Add/Remove Serial Numbers
Cancel x

Add 6 serial numbers

Enter Serial #:

Add

Edit

Remove

Serial #	Status
Y92453298	Pending Receive
A23424234	Received
Y43256890	Received
D232322242	Received

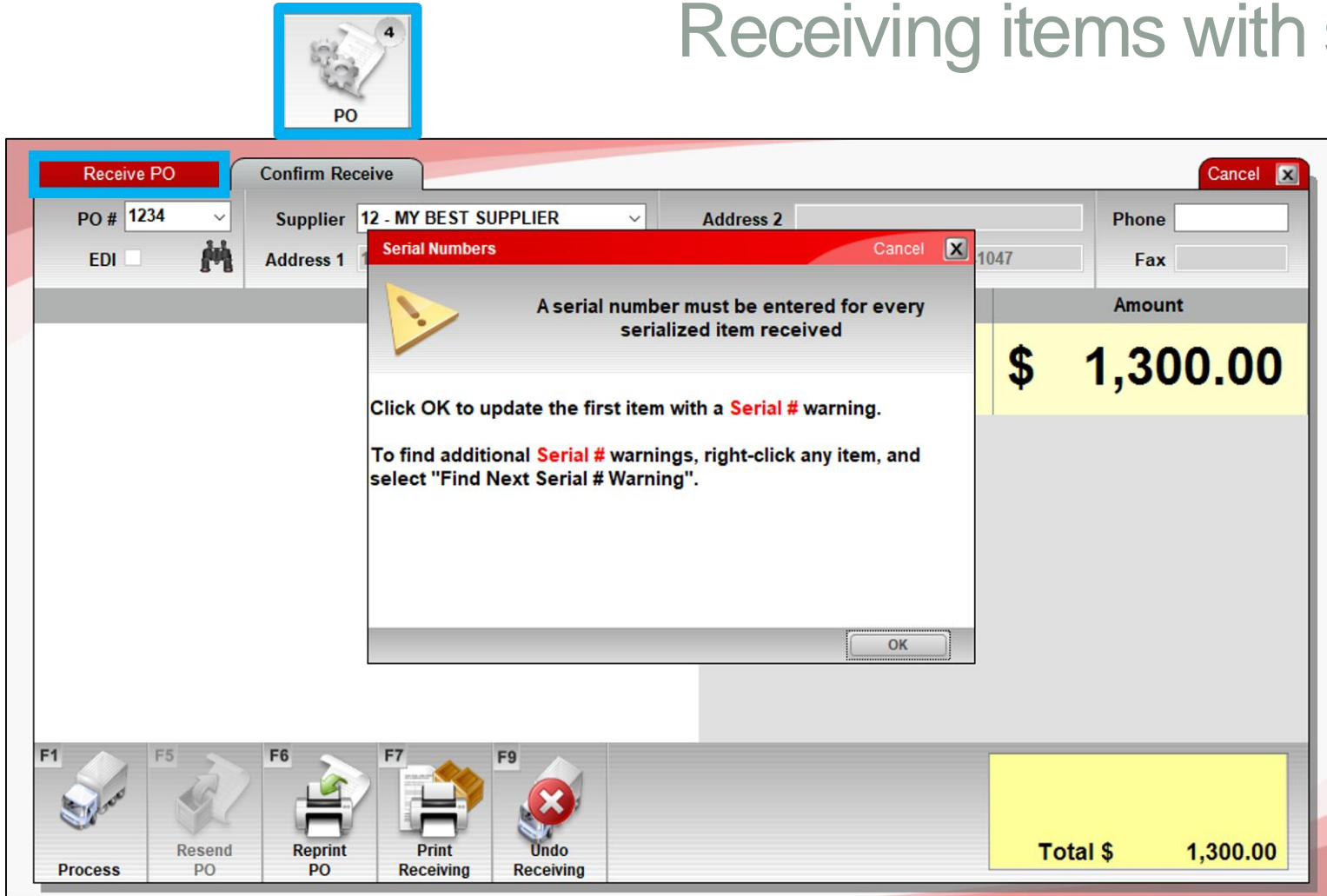
F12 Finish

Total \$

350.00

Serial numbers previously received on a partially-received PO, will appear in light gray with a **Status of Received** and cannot be edited.

## Receiving items with serial numbers



PO

Receive PO

Confirm Receive

PO # 1234

Supplier 12 - MY BEST SUPPLIER

Address 2

Phone

EDI

Address 1

1047

Fax

Amount

\$ 1,300.00

Serial Numbers

A serial number must be entered for every serialized item received

Click OK to update the first item with a **Serial #** warning.

To find additional **Serial #** warnings, right-click any item, and select "Find Next Serial # Warning".

OK

Cancel

F1 Process

F5 Resend PO

F6 Reprint PO

F7 Print Receiving

F9 Undo Receiving

Total \$ 1,300.00

You must resolve all **Serial #** warnings before you can process a PO.

As a safeguard, if you try to process a PO. without the correct number of serial numbers, a message appears and you will be taken to the first item with a **Serial #** warning.

## RF unit receiving serialized items

**RF Unit Mode:**

**#5. Receiving PO (Non-EDI)**

(Requires 15-line display)

## Receiving PO (Non-EDI)

```
Set Location loc=-1
Scan      064747503002
18 INCH CHAIN SAW
ORD=1    QTY=1
SELL=349.99 Sell=
```

Enter Serial number 1 of 1

```
-
Last Sale=12-Jul-24
Sold YTD=2
min/max=0/4
```

```
Set Location loc=-1
Scan      064747503002
18 INCH CHAIN SAW
ORD=1    QTY=1
SELL=349.99 Sell=
```

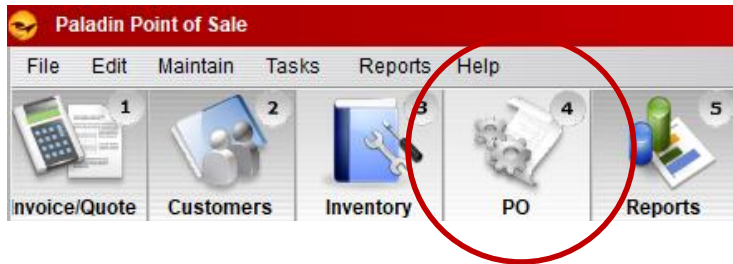
Enter Serial number 1 of 1  
CS-23499584\_

```
Last Sale=12-Jul-24
Sold YTD=2
min/max=0/4
```

- The new 15-line RF Unit function provides the capability to scan or enter serial numbers during the receiving process.
- See KBA: [RF Unit: 15 line functionality](#)
- See webinar: [New RF Gun Capabilities Put the Power of Paladin in Your Hands](#)





## Receiving PO (Non-EDI)











Receive PO Confirm Receive Cancel

PO #  Supplier  Address 2  Phone   
EDI  Address 1  City/State/Zip  Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input type="checkbox"/>			ORD REC			

F5  F6   
Mode PO | Receive Find PO

F1  F2  F3  F4  F5  F6  F7  F8   
Advanced Lookup Add Note Zero Qty Received Displaying Open | All Mode PO | Receive Find PO Review RF Receiving Process

Total \$ 0.00

- After you receive the items using the RF Unit, select the **Alt+4 PO Module** and press **Receive F5 Mode**, then **F6 Find PO**.

# Receiving PO (Non-EDI)

Receive PO **Confirm Receive** Cancel

PO #  Supplier  Address 2  Phone

EDI  Address 1  City/State/Zip  Fax

**Find PO** Cancel

1 PO Details

Enter the PO details below:

All POs  
 Open POs  
 Closed POs

Supplier

PO #

From Date

To Date

Part #

2 Matching Purchase Orders

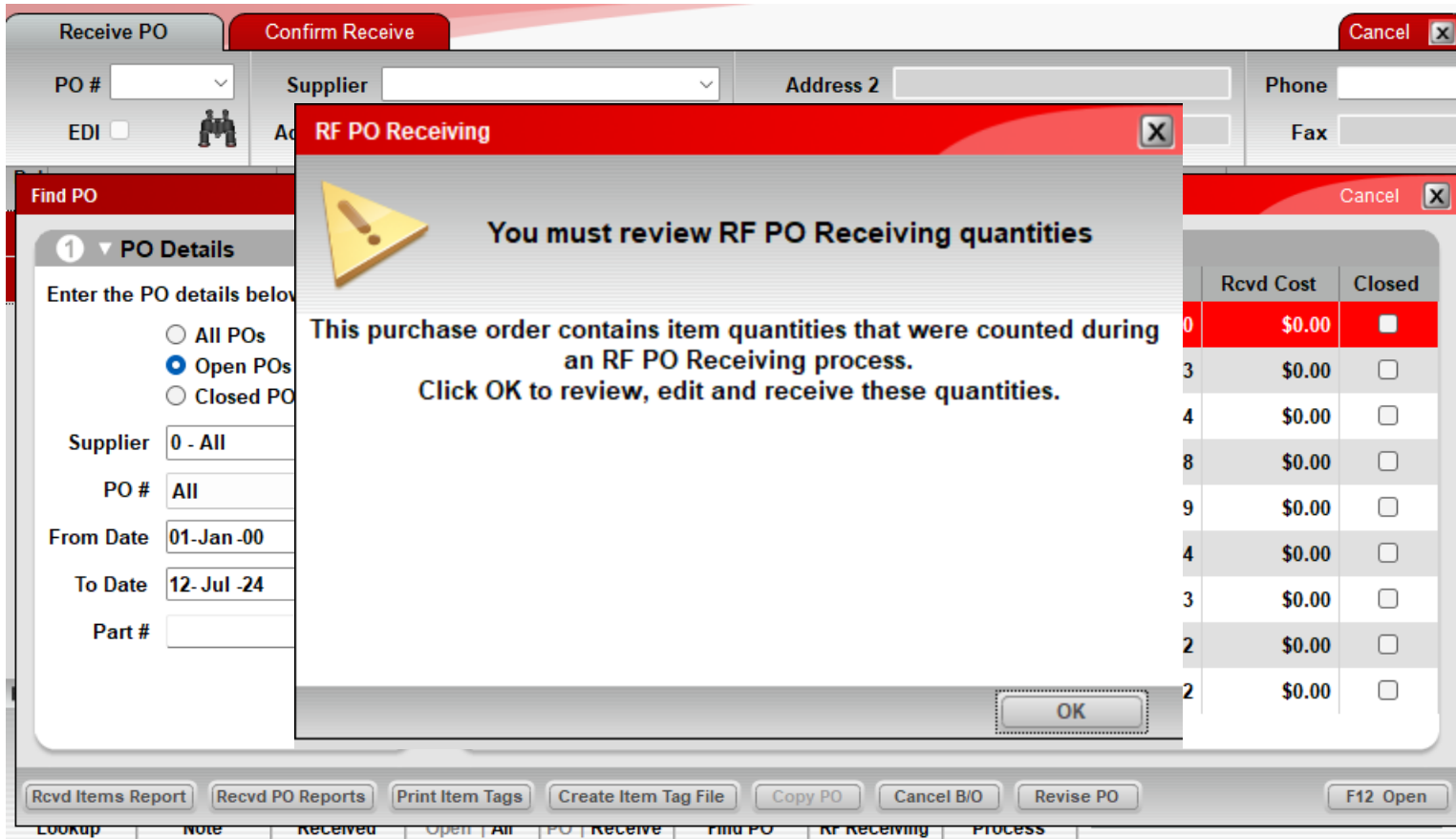
PO #	Vendor	PO Date	# Items	PO Cost	Rcvd Cost	Closed
421	DAKOTA'S BEST DIST	12-Jul-24	1	\$265.00	\$0.00	<input checked="" type="checkbox"/>
418	TRUE VALUE	03-Jul-24	5	\$412.83	\$0.00	<input type="checkbox"/>
417	TRUE VALUE	02-Jul-24	267	\$5,131.34	\$0.00	<input type="checkbox"/>
416	TRUE VALUE	02-Jul-24	437	\$5,463.88	\$0.00	<input type="checkbox"/>
415	TRUE VALUE	02-Jul-24	1	\$101.29	\$0.00	<input type="checkbox"/>
414	TRUE VALUE	02-Jul-24	1	\$17.84	\$0.00	<input type="checkbox"/>
413	TRUE VALUE	02-Jul-24	1	\$63.63	\$0.00	<input type="checkbox"/>
412	TRUE VALUE	02-Jul-24	1	\$134.72	\$0.00	<input type="checkbox"/>
411	TRUE VALUE	02-Jul-24	1	\$569.12	\$0.00	<input type="checkbox"/>

Rcvd Items Report Recvd PO Reports Print Item Tags Create Item Tag File Copy PO Cancel B/O Revise PO F12 Open

Lookup Note Received Open All PO Receive Find PO Rcv Receiving Process

- Next the **Open PO's** will be displayed.
- Select the PO of choice and either **double-click** or press the **Open F12** button.

## Receiving PO (Non-EDI)



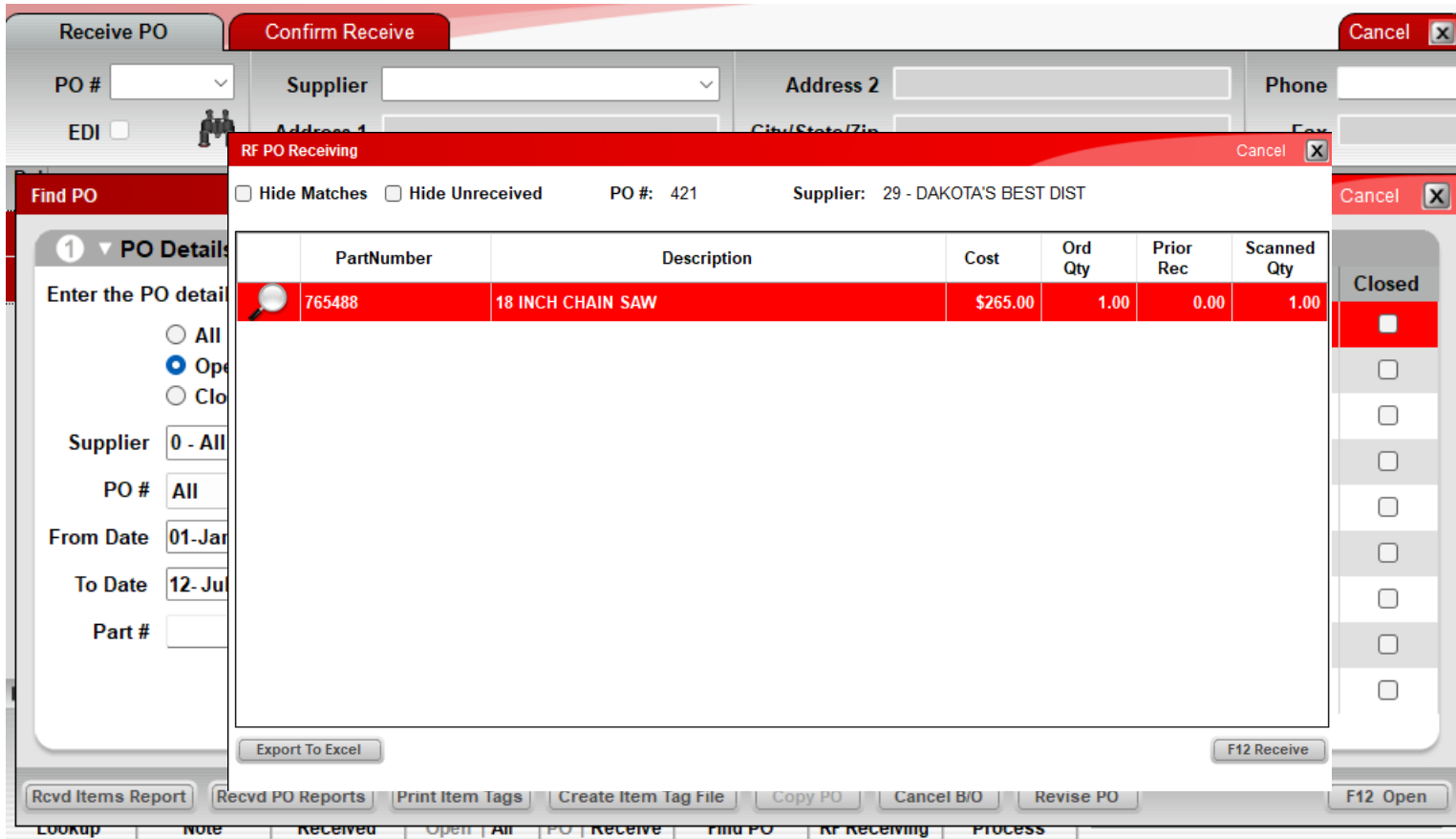
The screenshot shows a software interface for receiving a purchase order. A 'Confirm Receive' window is open, displaying a warning message: 'You must review RF PO Receiving quantities'. The message states: 'This purchase order contains item quantities that were counted during an RF PO Receiving process. Click OK to review, edit and receive these quantities.' The background window shows a 'Find PO' search form with various filters and a table of received items.

	Rcvd Cost	Closed
0	\$0.00	<input type="checkbox"/>
3	\$0.00	<input type="checkbox"/>
4	\$0.00	<input type="checkbox"/>
8	\$0.00	<input type="checkbox"/>
9	\$0.00	<input type="checkbox"/>
4	\$0.00	<input type="checkbox"/>
3	\$0.00	<input type="checkbox"/>
2	\$0.00	<input type="checkbox"/>
2	\$0.00	<input type="checkbox"/>

- If the PO was received using the RF Unit – Receive PO (non-EDI) mode, the following message will appear.
- Press OK to confirm receiving of the purchased items.



## Receiving PO (Non-EDI)



Receive PO

Confirm Receive

PO #  Supplier  Address 2  Phone

EDI  Address 1  City/State/Zip

RF PO Receiving

Hide Matches  Hide Unreceived PO #: 421 Supplier: 29 - DAKOTA'S BEST DIST

PartNumber	Description	Cost	Ord Qty	Prior Rec	Scanned Qty
765488	18 INCH CHAIN SAW	\$265.00	1.00	0.00	1.00

Export To Excel

F12 Receive

Rcvd Items Report Recvd PO Reports Print Item Tags Create Item Tag File Copy PO Cancel B/O Revise PO F12 Open

- Next the items purchased on this PO will appear.
- Press **F12 Review** to confirm receipt of product.

## RF unit receiving serialized items

**RF Unit Mode:**

**#6. Inbound Receiving**

(Requires 15-line display)

## Inbound receiving using the RF Unit

```
Set Location loc=-1
Scan      064747503002
18 INCH CHAIN SAW
ORD=1    QTY=1
SELL=349.99 Sell=
```

Enter Serial number 1 of 1

```
Last Sale=12-Jul-24
Sold YTD=2
min/max=0/4
```

```
Set Location loc=-1
Scan      064747503002
18 INCH CHAIN SAW
ORD=1    QTY=1
SELL=349.99 Sell=
```

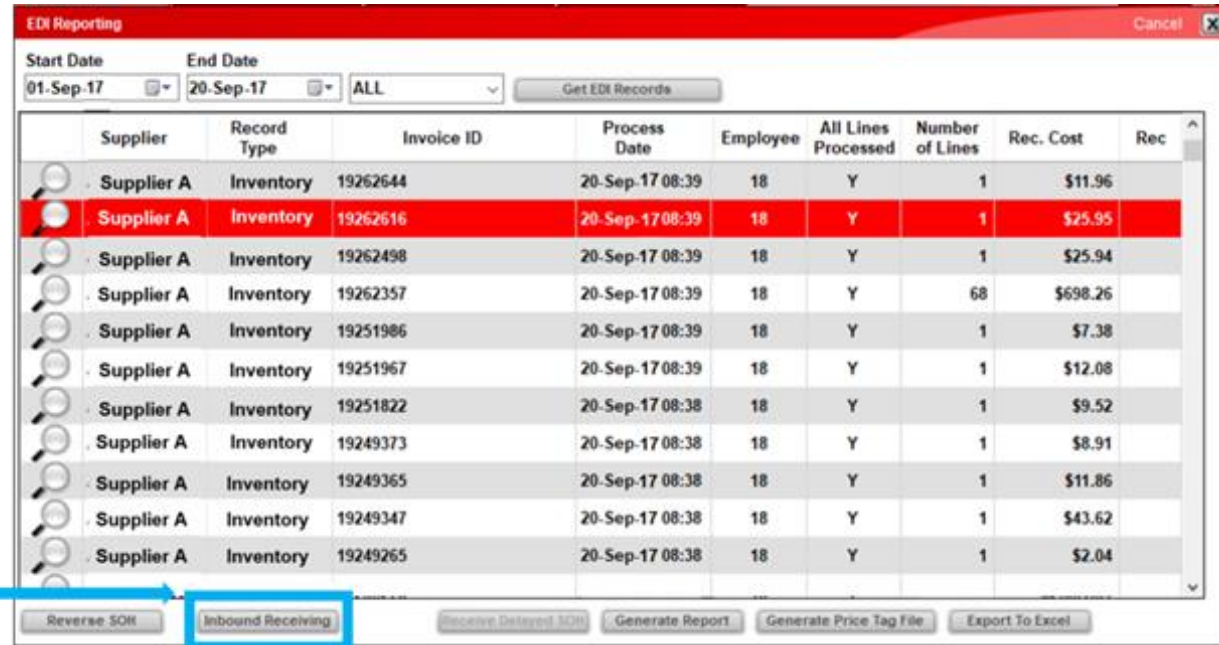
Enter Serial number 1 of 1  
CS-23499584\_

```
Last Sale=12-Jul-24
Sold YTD=2
min/max=0/4
```

- The new 15-line RF Unit function provides the capability to scan or enter serial numbers during the receiving process.
- See KBA: [RF Unit: 15 line functionality](#)
- See webinar: [New RF Gun Capabilities Put the Power of Paladin in Your Hands](#)

## Inbound receiving using the RF Unit


- From the RF unit, select **6. Inbound Receiving**.
- Scan each physically-received item and enter the received quantity on the RF unit.
- When prompted, enter the **serial number(s)**.
- When you have scanned all the items in the shipment, turn off the RF unit.
- In Paladin, on the top ribbon, select the **Inventory** module.
- On the bottom ribbon of the module, click **F9 EDI**.
- In the EDI Processing window, click **Reporting**.
- In the **EDI Reporting** window, select an EDI invoice that is associated with the received items, then click **Inbound Receiving**.



Supplier	Record Type	Invoice ID	Process Date	Employee	All Lines Processed	Number of Lines	Rec. Cost	Rec
Supplier A	Inventory	19262644	20-Sep-17 08:39	18	Y	1	\$11.96	
Supplier A	Inventory	19262616	20-Sep-17 08:39	18	Y	1	\$25.95	
Supplier A	Inventory	19262498	20-Sep-17 08:39	18	Y	1	\$25.94	
Supplier A	Inventory	19262357	20-Sep-17 08:39	18	Y	68	\$698.26	
Supplier A	Inventory	19251986	20-Sep-17 08:39	18	Y	1	\$7.38	
Supplier A	Inventory	19251967	20-Sep-17 08:39	18	Y	1	\$12.08	
Supplier A	Inventory	19251822	20-Sep-17 08:38	18	Y	1	\$9.52	
Supplier A	Inventory	19249373	20-Sep-17 08:38	18	Y	1	\$8.91	
Supplier A	Inventory	19249365	20-Sep-17 08:38	18	Y	1	\$11.86	
Supplier A	Inventory	19249347	20-Sep-17 08:38	18	Y	1	\$43.62	
Supplier A	Inventory	19249265	20-Sep-17 08:38	18	Y	1	\$2.04	

## Inbound receiving using the RF Unit

- In the **EDI Inbound Receiving** window, compare the quantities you entered on the RF unit (Rec Qty) with the EDI invoice quantities (Ship Qty).
- By default, only items with different Ship Qty and Rec Qty values appear. To show all items on the invoice, select **Show All**.
- You can edit the **Rec Qty** value without any time limits.



EDI Inbound Receiving

Show Discrepancies  Show All

	PartNumber	Description	Ship Qty	Rec Qty
<input checked="" type="checkbox"/>	6267	TRAY CUTLY 6COMP BISQUE	1.00	0.00
<input type="checkbox"/>	2207	HOOK & LOOP SAND PAD 5"	8.00	2.00
<input type="checkbox"/>	6082	COOL DADDY DEEP FRYER	1.00	3.00
<input type="checkbox"/>	6120	CUTLERY TRAY 13X11X2.3	1.00	5.00
<input type="checkbox"/>	6120	CUTLERY TRAY 16X13X1.8	1.00	1.00
<input type="checkbox"/>	6229	TABLE FAN 12" BLACK	3.00	0.00
<input type="checkbox"/>	8173	POOL FILTER TYPE A INTEX	6.00	0.00
<input type="checkbox"/>	8201	POOL FILTER TYPE B INTEX	6.00	0.00
<input type="checkbox"/>	8304	FILTER PUMP 530 GALLON	1.00	0.00
<input type="checkbox"/>	8398	SPA FILTER CARTRIDGE 2PK	3.00	0.00
<input type="checkbox"/>	8429	H FILTER CARTRIDGE	6.00	0.00
<input type="checkbox"/>	9430	MELON RINGS 3.75OZ	12.00	0.00

Reconcile Save Changes Export To Excel

You can edit these values.

Selling items with serial numbers

Invoice/Quote module



## Selling items with serial numbers



Invoice / Quote **Checkout** Cancel

Rewards 99887766558 Customer 6295 - JOHN SMITH Address 2 Phone  
Credit 0.00 Address 1 1500 MAIN AVE City/State/Zip NICE CITY, KS, 00000 Fax

Tax	Def	Net	Part	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL			0.00	\$ 160.00
40	0	SERIAL					

SOH ORD

**Add Serial Numbers** Cancel

Enter or select 1 serial number for part # 'SERIAL101'

Enter Serial Number



Available Serial Numbers

- B24039542
- N24531215
- D23232242
- E98765432
- P92384859
- I12RE2341
- YISADFA1
- N31OIOU4
- Y12SRE12
- NWA4239
- PA134110
- F12342882L
- IIISORI219

Selected Serial Numbers

- A23424234

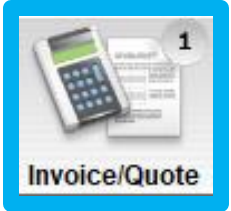
**Total \$ 160.00**  
**Tax \$ 12.80**  
**Total \$ 172.80**

F1  F2 

Advanced Lookup Add Note Delete Line Item Discount Item Account Payment Store Transaction Stock Check Checkout

In the **Invoice/Quote** module, when a cashier adds a serialized item to an invoice, they will be prompted to select a serial number from the available serial numbers for that item.

## Selling items with serial numbers



**Add Serial Numbers** Cancel X

Enter or select 1 serial number for part # 'SERIAL1'

Enter Serial Number


Available Serial Numbers

A23424234	<input type="button" value="Select &gt;&gt;&gt;"/> <input type="button" value="Remove &lt;&lt;&lt;"/> <input type="button" value="F12 Finish"/>
B24039542	
N24531215	
D23232242	
E98765432	
P92384859	
I12RE2341	
YISADFA1	
N31OIOU4	
Y12SRE12	
NWA4239	
PA134110	
E123428821	

Selected Serial

W98213489

**Add Serial Number** Cancel X

 **Serial number not found on this item**

Do you want to add the new serial number 'J31489002' to this item?

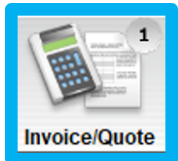
Caution: Serial numbers are not typically added at the time of sale. Make sure the serial number is correct

Manager password required:

If the serial number does not appear in the list, you can enter it manually with manager approval.



# Selling items with serial numbers



Invoice / Quote
Checkout
Cancel

Rewards

Credit

Customer

Address 1

Address 2

City/State/Zip

Phone

Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL101	16 IN. CHAIN SAW--GAS	2	\$ 160.00	\$ 320.00
			SERIAL101			160.00	
				Serial #: A23424234			
				Serial #: B24039542			
				NOTES			
				NOTES			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL102	20,000 BTU PORTABLE	1	\$ 300.00	\$ 300.00
			SERIAL102			300.00	
						SERIAL #	

SOH

ORD

F1

F2

F3

F4

F5

F6

F7

F8

Subtotal \$ 620.00

Tax \$ 49.60

Total \$ 669.60

Serialized items are identified by a **SERIAL #** label.

Selected serial numbers are added as line items on the invoice.

A red **SERIAL #** warning indicates that the item does not have the required number of serial numbers.

# Selling items with serial numbers



Invoice / Quote    Checkout    Cancel

Rewards: 99887766558    Customer: 6295 - JOHN SMITH    Address 2:    Phone:    Credit: 0.00    Address 1: 1500 MAIN AVE    City/State/Zip: NICE CITY, KS, 00000    Fax:   

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Serial #: B24039542				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL102	20,000 BTU PORTABLE A/C	1	\$ 300.00	\$ 300.00
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL102				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART1	HAMM			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART1				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART2	BUZZ S			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	PART2				

SOH    ORD

F1 Advanced Lookup    F2 Add Note    F3 Delete Line Item    F4    F8 Checkout

Subtotal \$ 692.00  
Tax \$ 55.36  
Total \$ 747.36

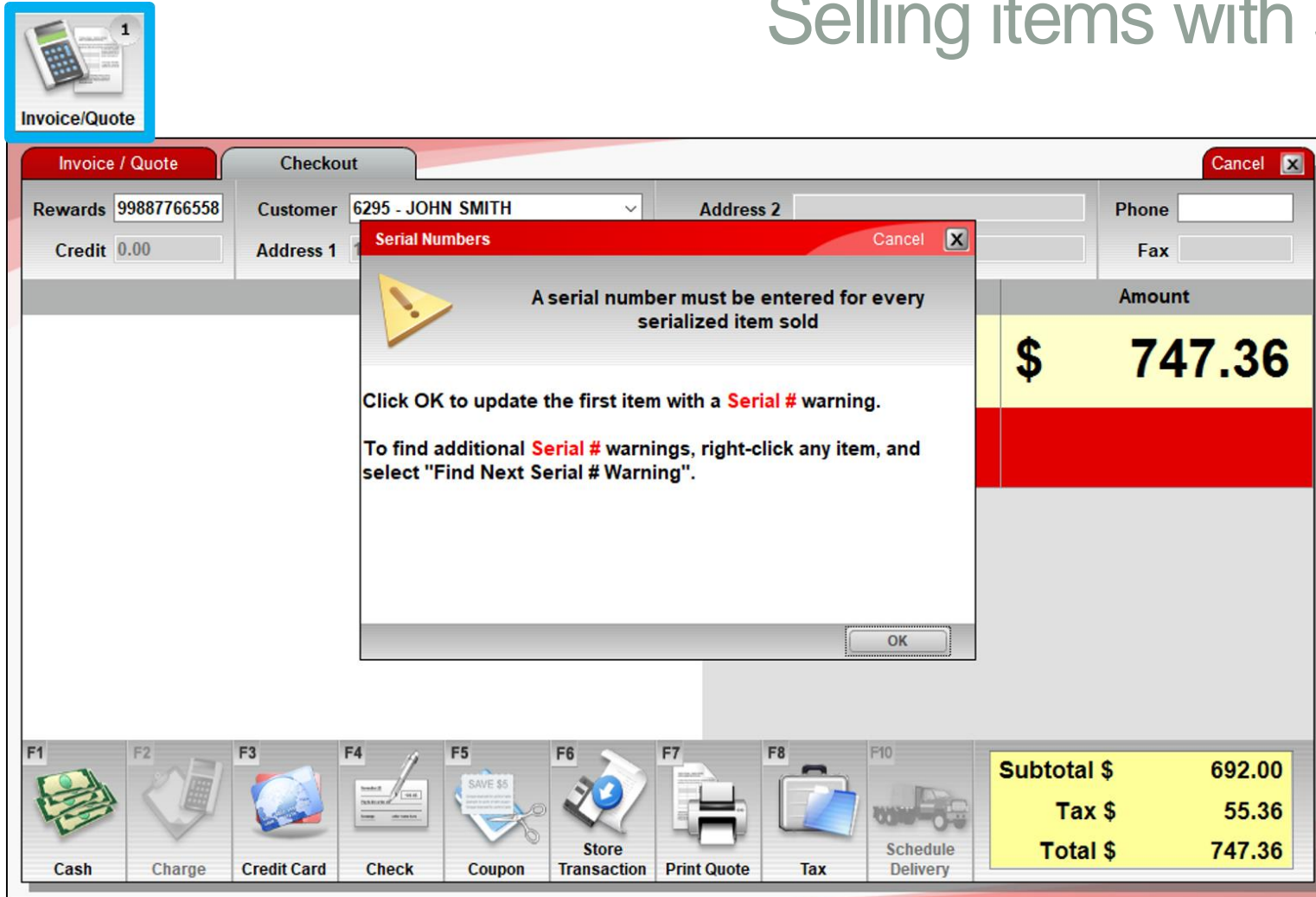
right-click

- Insert Line Item
- Delete Line Item (F3)
- Insert Note
- Add Precision
- Profit Analyst (Alt + A)
- Footage Calculator (Ctrl + K)
- Square Footage Calculator (Ctrl + S)
- Insert Subtotal
- Update to Current Price
- Update All to Current Prices
- Search Invoice / Quote
- Add Serial #
- Find Next Serial # Warning
- Weigh Item
- Copy (Ctrl + C)
- Paste (Ctrl + V)

You can also add, edit and view serial numbers using the quick access (right-click) menu.

- **Add Serial #:** Opens the **Add/Remove Serial Number** window.
- **Find Next Serial #**  
**Warning:** Moves to the next invoice item that needs serial numbers.

## Selling items with serial numbers




Invoice/Quote

Invoice / Quote    Checkout    Cancel

Rewards 99887766558    Customer 6295 - JOHN SMITH    Address 2    Phone    Fax

Credit 0.00    Address 1

**Serial Numbers**    Cancel

 A serial number must be entered for every serialized item sold

Click OK to update the first item with a **Serial #** warning.

To find additional **Serial #** warnings, right-click any item, and select "Find Next Serial # Warning".

OK

Amount
\$ 747.36

F1 Cash    F2 Charge    F3 Credit Card    F4 Check    F5 Coupon    F6 Store Transaction    F7 Print Quote    F8 Tax    F10 Schedule Delivery

Subtotal \$	692.00
Tax \$	55.36
Total \$	747.36

You must resolve all **Serial #** warnings before you can process an invoice.

As a safeguard, if you try to process an invoice without the correct number of serial numbers, a message appears and you will be taken to the first item with a **Serial #** warning.

## Selling items with serial numbers

*Your Hardware Store*

Thank you for shopping with us!

**Your Hardware Store**  
 1000 Ace Lane  
 Happyville, TX 12345  
 (123) 456-7890

JOHN SMITH  
 1500 MAIN AVE  
 NICE CITY, KS 00000  
 ACCOUNT # 7 6295

ITEM	QTY	SALE/REG	EXT
SERIAL101	2.00	160.00	320.00
EACH			
16 IN. CHAIN SAW--GAS			
Serial #: A23424234			
Serial #: B24039542			
SERIAL102	1.00	300.00	300.00
EACH			
20,000 BTU PORTABLE A/C			
Serial #: YWER23U			
PART1	1.00	20.00	20.00
EACH			
HAMMER			
PART2	2.00	26.00	52.00
EACH			
BUZZ SAW			

SUBTOTAL \$	692.00
TAX \$	55.36
<b>TOTAL \$</b>	<b>747.36</b>

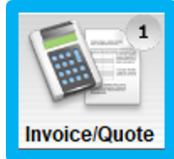
CASH 747.36

EMPLOYEE	TERM	INV#	TIME	DATE
1	11	61316	05:42	20-Jan-20

ITEM	QTY	SALE/REG	EXT
SERIAL101	2.00	160.00	320.00
EACH			
16 IN. CHAIN SAW--GAS			
Serial #: A23424234			
Serial #: B24039542			
SERIAL102	1.00	300.00	300.00
EACH			
20,000 BTU PORTABLE A/C			
Serial #: YWER23U			

Serial numbers will appear on the customer's receipt for easy reference.

## Selling items with serial numbers



Invoice / Quote    Checkout    Cancel

Rewards    Customer    Address 2    Phone

Credit    Address 1    City/State/Zip    Fax

Tax	Def	Net	Part Number	Description	Quantity	Price	Extension
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SERIAL101	16 in. Chain Saw--Gas	EACH	-1 \$ 160.00	\$ -160.00

38 Return Serial Numbers    Cancel

Enter or select 1 serial number for returned part # 'SERIAL101'

Enter Serial Number

Sold Serial Numbers    Selected Serial Numbers

A123457890       

F12 Finish

Subtotal \$ -160.00  
Tax \$ -12.80  
Total \$ -172.80

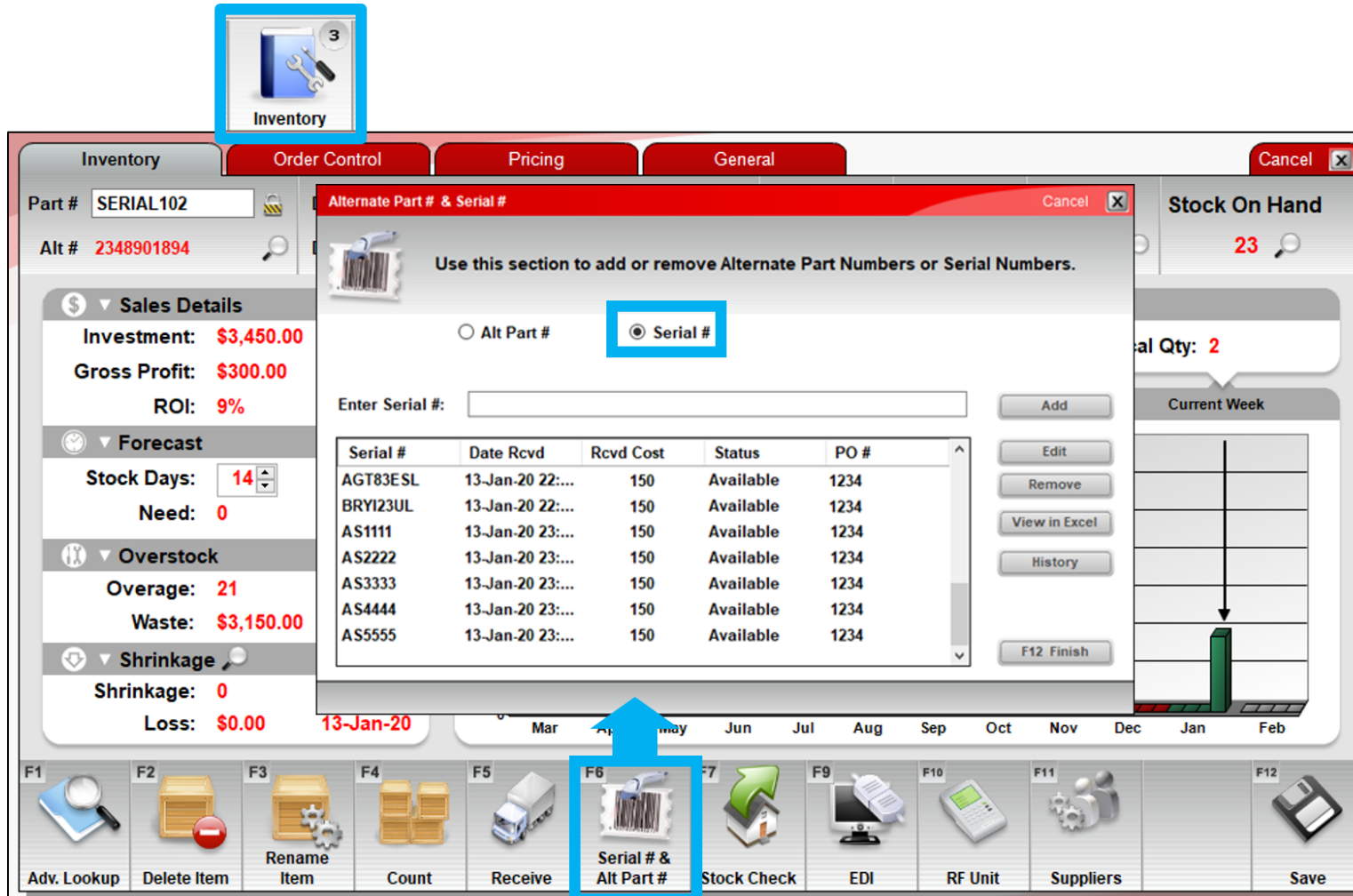
When a customer returns a serialized item, the cashier must select the serial number from this list of **Sold Serial Numbers** for that item.

The return cannot be processed until a serial number is selected.

# Managing an item's serial numbers Inventory module



## Managing an item's serial numbers



The screenshot displays the Inventory module interface. A blue box highlights the 'Inventory' icon in the top-left corner. The main window shows the 'Inventory' tab with fields for Part # (SERIAL102) and Alt # (2348901894). A dialog box titled 'Alternate Part # & Serial #' is open, allowing users to add or remove alternate part numbers or serial numbers. The 'Serial #' radio button is selected. Below the dialog, a table lists serial numbers and their details:

Serial #	Date Rcvd	Rcvd Cost	Status	PO #
AGT83ESL	13-Jan-20 22:...	150	Available	1234
BRYI23UL	13-Jan-20 22:...	150	Available	1234
AS1111	13-Jan-20 23:...	150	Available	1234
AS2222	13-Jan-20 23:...	150	Available	1234
AS3333	13-Jan-20 23:...	150	Available	1234
AS4444	13-Jan-20 23:...	150	Available	1234
AS5555	13-Jan-20 23:...	150	Available	1234

The interface also shows 'Sales Details' (Investment: \$3,450.00, Gross Profit: \$300.00, ROI: 9%), 'Forecast' (Stock Days: 14, Need: 0), and 'Overstock' (Overage: 21, Waste: \$3,150.00) information. A 'Stock On Hand' section shows a quantity of 23. The bottom toolbar includes icons for Adv. Lookup, Delete Item, Rename Item, Count, Receive, Serial # & Alt Part # (highlighted with a blue box and arrow), Stock Check, EDI, RF Unit, Suppliers, and Save.

In the **Inventory** module, you can view and edit an item's available (in-stock) serial number list.

You can also access a detailed serial number history and view the serial number information in Excel.

# Managing an item's serial numbers



Alternate Part # & Serial #



Use this

Alt F

Enter Serial #:

Book2 - Excel

File Home Insert Draw Page Layout Formulas Data Review View Add-ins Help Team Tell me

A4 4312AADA

	A	B	C	D	E
1	Partnumber: SERIAL102	Description: 20,000 BTU PORTABLE A/C	Avg Cost: \$150.00	Retail: \$300.00	Report Date: 20-Jan-20 11:59:46 AM
2					
3	Serial #	Date Rcvd	PO #	Rcvd Cost	Status
21	AS1111	13-Jan-20 11:42:27 PM	1234	150.000	Available
22	AS2222	13-Jan-20 11:42:27 PM	1234	150.000	Available
23	AS3333	13-Jan-20 11:42:27 PM	1234	150.000	Available
24	AS4444	13-Jan-20 11:42:27 PM	1234	150.000	Available
25	AS5555	13-Jan-20 11:42:27 PM	1234	150.000	Available

Sheet1

Ready Display Settings 100%

Serial #	Date Rcvd	Rcvd Cost	Status	PO #
AGT83ESL	13-Jan-20 22:...	150	Available	1234
BRYI23UL	13-Jan-20 22:...	150	Available	1234
AS1111	13-Jan-20 23:...	150	Available	1234
AS2222	13-Jan-20 23:...	150	Available	1234
AS3333	13-Jan-20 23:...	150	Available	1234
AS4444	13-Jan-20 23:...	150	Available	1234
AS5555	13-Jan-20 23:...	150	Available	1234

View in Excel

F12 Finish

To view the available serial number information in a spreadsheet, click **View in Excel** in the **Alternate Part # & Serial #** window.



# Managing an item's serial numbers



Alternate Part # & Serial #

Use this section

Alt Part #

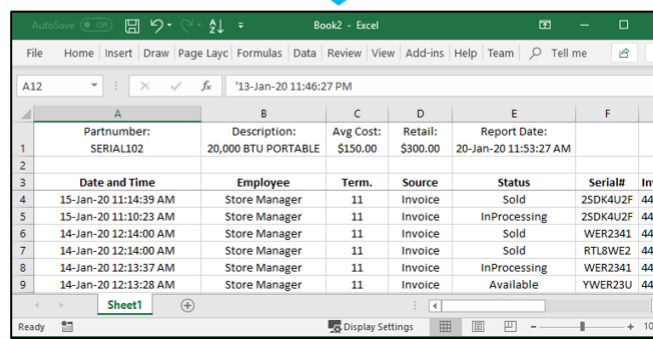
Enter Serial #:

Serial #	Date Rcvd	Quantity	Status	Location
AGT83ESL	13-Jan-20 22:...	150	Available	1234
BRYI23JUL	13-Jan-20 22:...	150	Available	1234
AS1111	13-Jan-20 23:...	150	Available	1234
AS2222	13-Jan-20 23:...	150	Available	1234
AS3333	13-Jan-20 23:...	150	Available	1234
AS4444	13-Jan-20 23:...	150	Available	1234
AS5555	13-Jan-20 23:...	150	Available	1234

Buttons: View in Excel, History, F12 Finish

Date	Time	Employee	Term.	Source	Inv Id	Serial#	Status	Memo	Invoice Id	Cust Id	Store Id	PO #
14-Jan-20	00:14	Store M...	11	Invoice	44522	WER2341	Sold	Created...	61311	6295	0	
14-Jan-20	00:14	Store M...	11	Invoice	44522	RTL8WE2	Sold	Created...	61311	6295	0	
14-Jan-20	00:13	Store M...	11	Invoice	44522	WER2341	InProce...	Created...	-1	-1	0	
14-Jan-20	00:13	Store M...	11	Invoice	44522	YWER23U	Available	Previou...	-1	-1	0	
14-Jan-20	00:13	Store M...	11	Invoice	44522	YWER23U	InProce...	Previou...	-1	-1	0	
14-Jan-20	00:08	Store M...	11	Invoice	44522	RTL8WE2	InProce...	Created...	-1	-1	0	
13-Jan-20	23:46	Store M...	11	Manual	44522	AS2222	Available	Previou...	-1	-1	0	1234
13-Jan-20	23:46	Store M...	11	Manual	44522	AS1111	Available	Previou...	-1	-1	0	1234
13-Jan-20	23:45	Store M...	11	Manual	44522	AS93U420	Available	Previou...	-1	-1	0	1234
13-Jan-20	23:45	Store M...	11	Manual	44522	AS1IEWF1	Available	Previou...	-1	-1	0	1234
13-Jan-20	23:42	Store M...	11	PO_REC	44522	AS1111	Available		-1	-1	0	1234
13-Jan-20	23:42	Store M...	11	PO_REC	44522	AS2222	Available		-1	-1	0	1234
13-Jan-20	23:42	Store M...	11	PO_REC	44522	AS3333	Available		-1	-1	0	1234

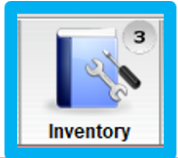
Buttons: View in Excel, Done



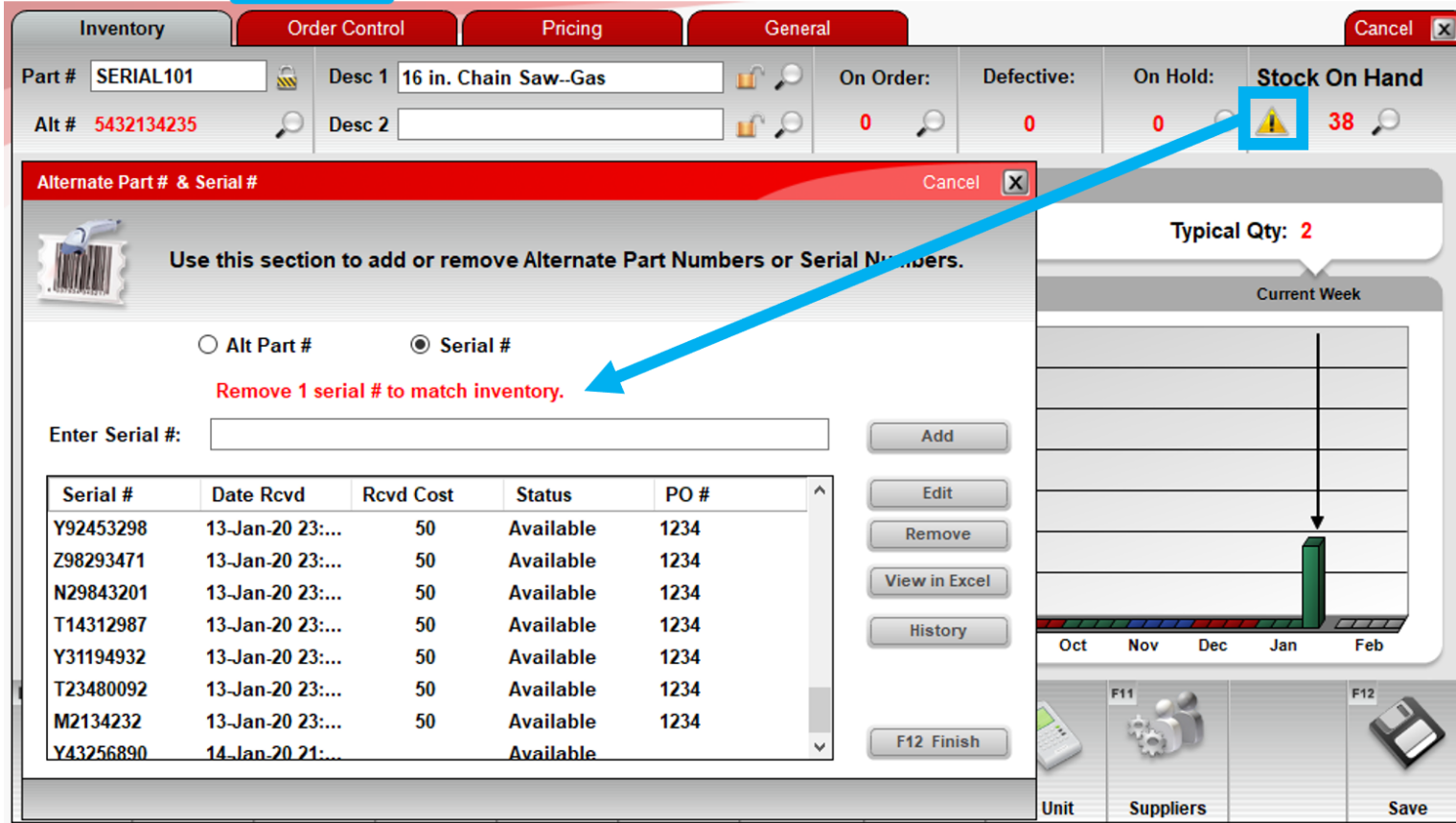
Date and Time	Employee	Term.	Source	Status	Serial#	Inv
15-Jan-20 11:14:39 AM	Store Manager	11	Invoice	Sold	25DK4U2F	445
15-Jan-20 11:10:23 AM	Store Manager	11	Invoice	InProcessing	25DK4U2F	445
14-Jan-20 12:14:00 AM	Store Manager	11	Invoice	Sold	WER2341	445
14-Jan-20 12:14:00 AM	Store Manager	11	Invoice	Sold	RTL8WE2	445
14-Jan-20 12:13:37 AM	Store Manager	11	Invoice	InProcessing	WER2341	445
14-Jan-20 12:13:28 AM	Store Manager	11	Invoice	Available	YWER23U	445

The **Serial Number History** viewer (**click History**) provides detailed documentation and transparency for all events that involve a serial number.

To review this information in an Excel spreadsheet, at the bottom of the **History** viewer window, click **View in Excel**.



## Managing an item's serial numbers



The screenshot shows the Inventory module interface for item SERIAL101 (16 in. Chain Saw--Gas). The Stock On Hand (SOH) is 38. A yellow warning icon with an exclamation point is next to the SOH value, indicating a discrepancy. A blue arrow points from this icon to the 'Alternate Part # & Serial #' dialog box.

The dialog box shows the 'Serial #' radio button selected. A red message states: "Remove 1 serial # to match inventory." Below this is a table of serial numbers:

Serial #	Date Rcvd	Rcvd Cost	Status	PO #
Y92453298	13-Jan-20 23:...	50	Available	1234
Z98293471	13-Jan-20 23:...	50	Available	1234
N29843201	13-Jan-20 23:...	50	Available	1234
T14312987	13-Jan-20 23:...	50	Available	1234
Y31194932	13-Jan-20 23:...	50	Available	1234
T23480092	13-Jan-20 23:...	50	Available	1234
M2134232	13-Jan-20 23:...	50	Available	1234
Y43256890	14-Jan-20 21:...		Available	

Buttons for 'Add', 'Edit', 'Remove', 'View in Excel', 'History', and 'F12 Finish' are visible. A bar chart on the right shows the stock level for the current week, with a peak in January.

The number of available serial numbers should equal your stock on hand (SOH) quantity.

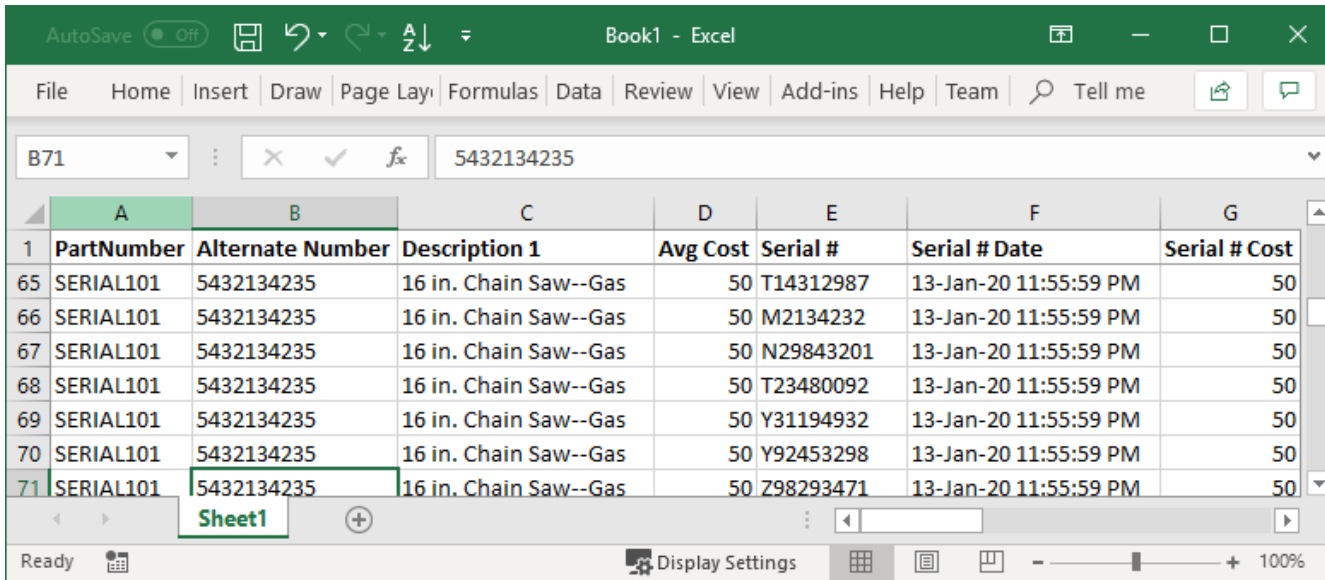
If there are too many or too few serial numbers for an item, a yield button with an exclamation point appears in the Inventory module next to the **SOH** value.

Click this button to view and address the discrepancy.

# Serial Number Reporting

Reports module

# Serial Number List Report



	A	B	C	D	E	F	G
1	PartNumber	Alternate Number	Description 1	Avg Cost	Serial #	Serial # Date	Serial # Cost
65	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	T14312987	13-Jan-20 11:55:59 PM	50
66	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	M2134232	13-Jan-20 11:55:59 PM	50
67	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	N29843201	13-Jan-20 11:55:59 PM	50
68	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	T23480092	13-Jan-20 11:55:59 PM	50
69	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	Y31194932	13-Jan-20 11:55:59 PM	50
70	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	Y92453298	13-Jan-20 11:55:59 PM	50
71	SERIAL101	5432134235	16 in. Chain Saw--Gas	50	Z98293471	13-Jan-20 11:55:59 PM	50

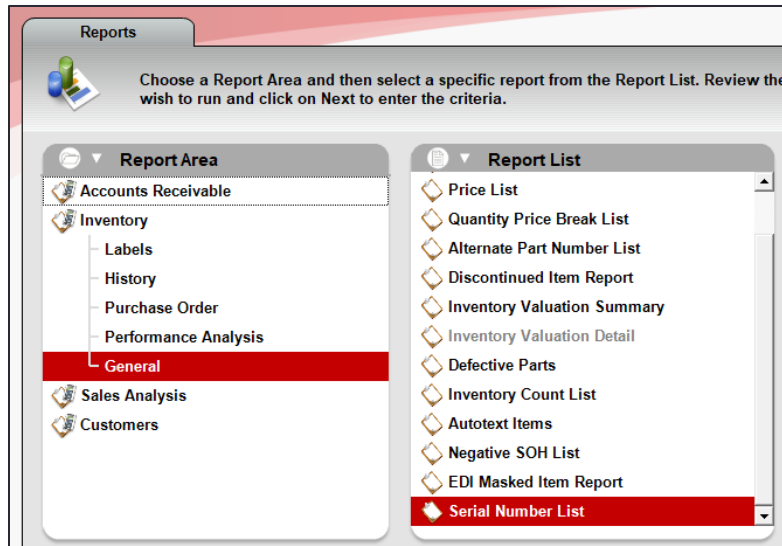
The **Serial Number List Report** provides a itemized list of serialized items and their serial numbers including:

- Serialized Part # & Alt Part #
- Serialized item description
- Serial #'s (one serial # per line)
- Serial # added/received date
- Current serial # status (Available, Sold, etc.)
- Supplier cost when serial # was received (if available)
- Received PO # (if available)

# Serial Number List Report

The **Serial Number List** Report is available in the **Reports** module, in the **Inventory > General** category.

You can filter your report by specifying inventory item parameters in the **Report Settings** pane.

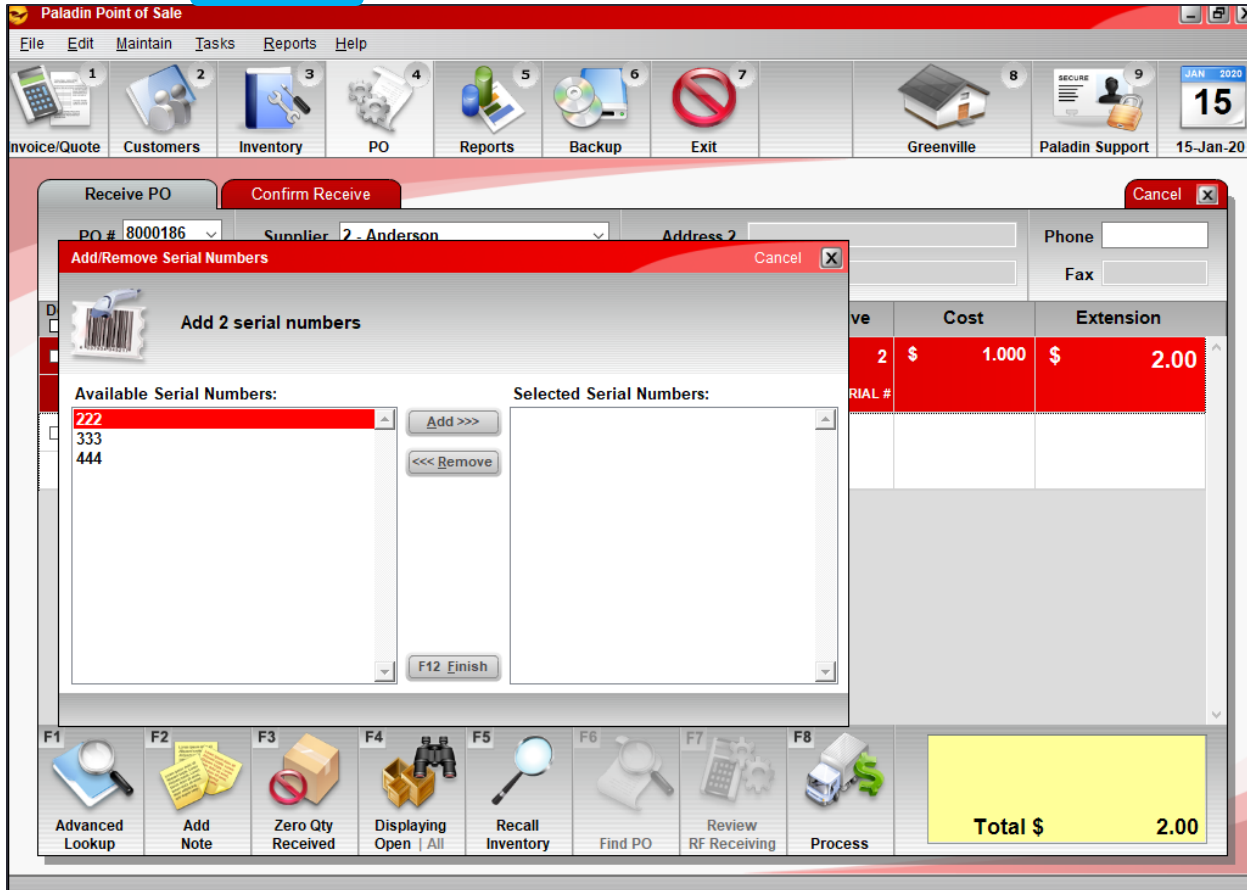


Serial Number List		
1 Report Settings		
Selection	Beginning	Ending
PartNumber	<input type="text"/>	<input type="text" value="ZZZZZZZZZZZZZZ"/>
Department	<input type="text" value="0"/>	<input type="text" value="99999999"/>
Supplier	<input type="text" value="0"/>	<input type="text" value="99999999"/>
Class	<input type="text" value="0"/>	<input type="text" value="99999999"/>
SubClass	<input type="text" value="0"/>	<input type="text" value="99999999"/>
Location	<input type="text" value="0"/>	<input type="text" value="99999999"/>

Multi-store serialized item transfers

PO and Inventory modules

## Multi-store serialized item transfers: PO module



Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 PO 5 Reports 6 Backup 7 Exit 8 Greenville 9 Paladin Support 15-Jan-20

Receive PO Confirm Receive Cancel

PO # 8000186 Supplier 2 - Anderson Address 2 Phone Fax

Add/Remove Serial Numbers Cancel

Add 2 serial numbers

Available Serial Numbers: 222 333 444

Selected Serial Numbers:

Add >>> <<< Remove

F12 Finish

Quantity	Cost	Extension
2	\$ 1.000	\$ 2.00

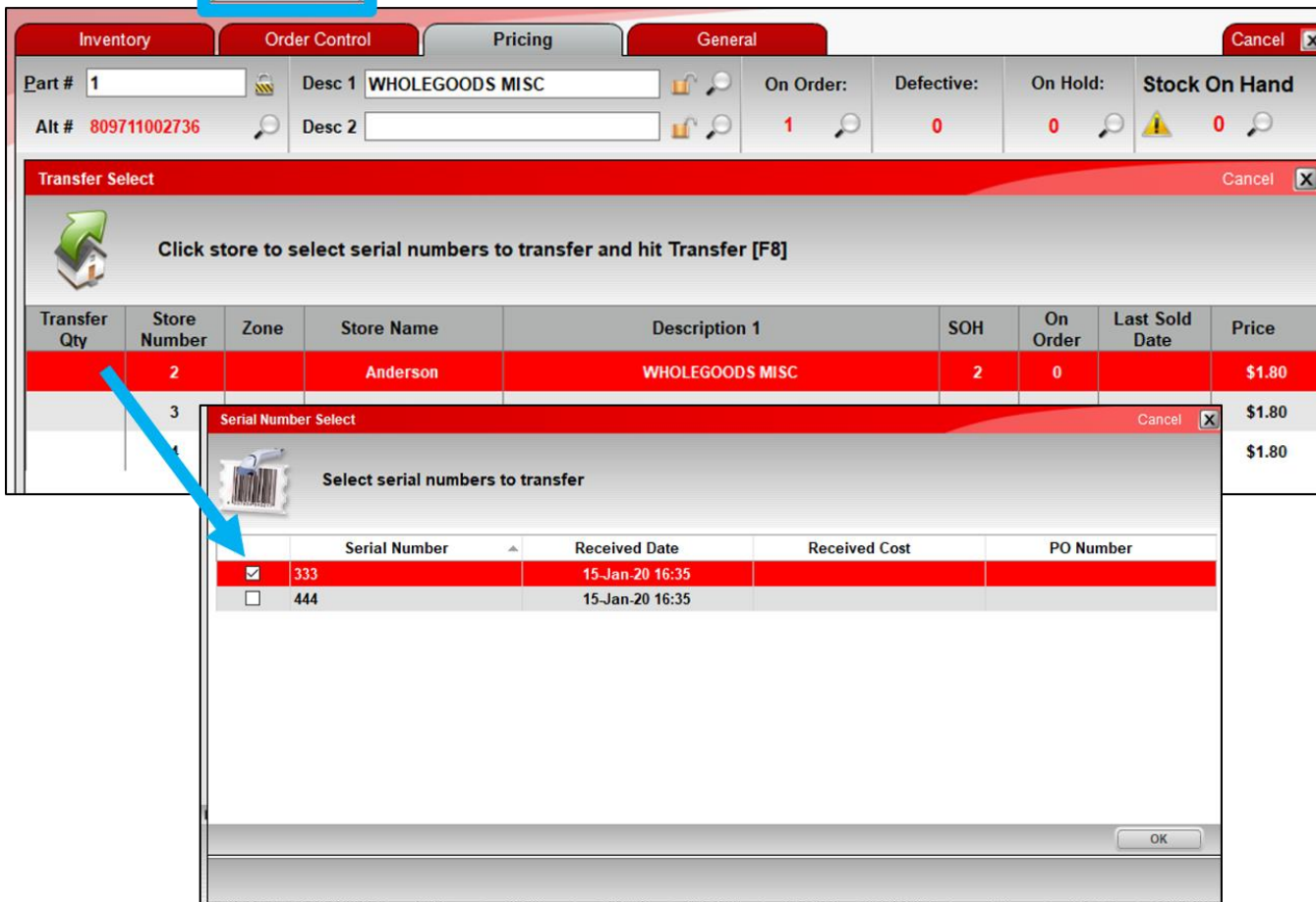
F1 Advanced Lookup F2 Add Note F3 Zero Qty Received F4 Displaying Open | All F5 Recall Inventory F6 Find PO F7 Review RF Receiving F8 Process

Total \$ 2.00

**Scenario 1:** A store creates a PO to to transfer an item from another store.

When the item is received, the store must select the item's serial number from the other store's **Available Serial Numbers** list.

# Multi-store serialized item transfers: Inventory F7 Transfer

Part # 1 Desc 1 WHOLEGOODS MISC On Order: 1 Defective: 0 On Hold: 0 Stock On Hand 0

Alt # 809711002736 Desc 2

**Transfer Select**

Click store to select serial numbers to transfer and hit Transfer [F8]

Transfer Qty	Store Number	Zone	Store Name	Description 1	SOH	On Order	Last Sold Date	Price
	2		Anderson	WHOLEGOODS MISC	2	0		\$1.80
	3							\$1.80
								\$1.80

**Serial Number Select**

Select serial numbers to transfer

Serial Number	Received Date	Received Cost	PO Number
<input checked="" type="checkbox"/> 333	15-Jan-20 16:35		
<input type="checkbox"/> 444	15-Jan-20 16:35		

**Scenario 2:** A store uses the F7 transfer feature (bottom ribbon in the **Inventory** module) to transfer an item from another store.

When the request is made, the receiving store must select a specific serial number to transfer.

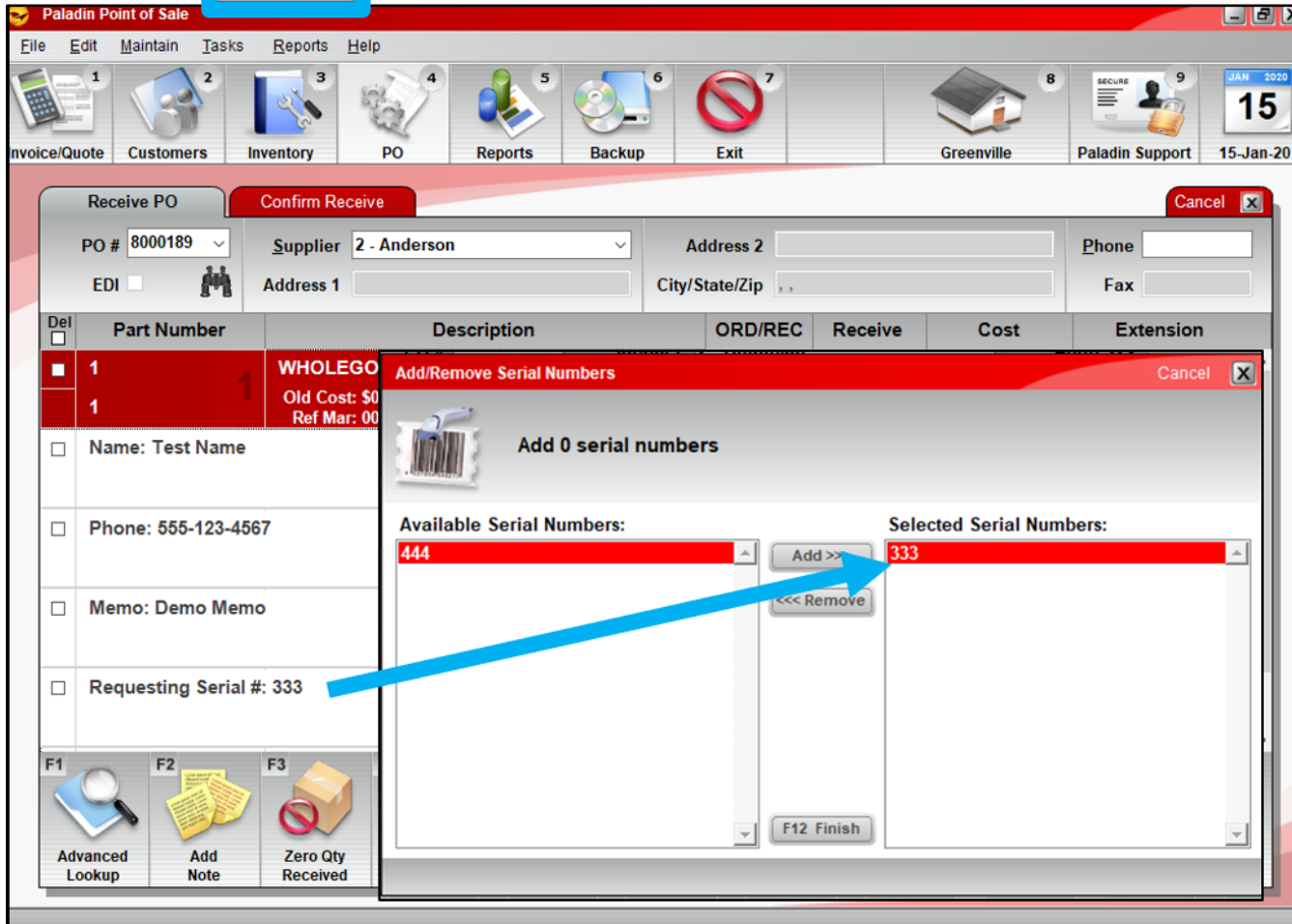
The PO that is created includes the selected serial number in a note.





# Multi-store serialized item transfers: Inventory F7 Transfer

When item is received, the serial number is automatically selected on the PO, but can be changed.



Paladin Point of Sale

File Edit Maintain Tasks Reports Help

1 Invoice/Quote 2 Customers 3 Inventory 4 PO 5 Reports 6 Backup 7 Exit 8 Greenville 9 Paladin Support 15-Jan-20

Receive PO Confirm Receive Cancel

PO # 8000189 Supplier 2 - Anderson Address 2 Phone

EDI Address 1 City/State/Zip Fax

Del	Part Number	Description	ORD/REC	Receive	Cost	Extension
<input checked="" type="checkbox"/>	1	WHOLEGO				
	1	Add/Remove Serial Numbers				
<input type="checkbox"/>	Name: Test Name					
<input type="checkbox"/>	Phone: 555-123-4567					
<input type="checkbox"/>	Memo: Demo Memo					
<input type="checkbox"/>	Requesting Serial #: 333					

Add/Remove Serial Numbers Cancel

Add 0 serial numbers

Available Serial Numbers: 444 Add >> Selected Serial Numbers: 333 <<< Remove

F1 Advanced Lookup F2 Add Note F3 Zero Qty Received F12 Finish

Save the Date

Next Webinar:  
August 6th



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