efi Productivity Suite

User Guide

Managing Receiving with and without Serialized Inventory

PrintStream Integration with EFI MIS System
V21.1.0200

EFI PrintStream | *V21.1.0200 Managing Receiving With and Without Serialized Inventory*

Patents

This product may be covered by one or more of the following U.S. Patents: 4,716,978, 4,828,056, 4,917,488, 4,941,038, 5,109,241, 5,170,182, 5,212,546, 5,260,878, 5,276,490, 5,278,599, 5,335,040, 5,343,311, 5,398,107, 5,424,754, 5,442,429, 5,459,560, 5,467,446, 5,506,946, 5,517,334, 5,537,516, 5,543,940, 5,553,200, 5,563,689, 5,565,960, 5,583,623, 5,596,416, 5,615,314, 5,619,624, 5,625,712, 5,640,228, 5,666,436, 5,745,657, 5,760,913, 5,799,232, 5,818,645, 5,835,788, 5,859,711, 5,867,179, 5,940,186, 5,959,867, 5,970,174, 5,982,937, 5,995,724, 6,002,795, 6,025,922, 6,035,103, 6,041,200, 6,065,041, 6,112,665, 6,116,707, 6,122,407, 6,134,018, 6,141,120, 6,166,821, 6,173,286, 6,185,335, 6,201,614, 6,215,562, 6,219,155, 6,219,659, 6,222,641, 6,224,048, 6,225,974, 6,226,419, 6,238,105, 6,239,895, 6,256,108, 6,269,190, 6,271,937, 6,278,901, 6,279,009, 6,289,122, 6,292,270, 6,299,063, 6,310,697, 6,321,133, 6,327,047, 6,327,050, 6,327,052, 6,330,071, 6,330,363, 6,331,899, 6,340,975, 6,341,017, 6,341,018, 6,341,307, 6,347,256, 6,348,978, 6,356,359, 6,366,918, 6,369,895, 6,381,036, 6,400,443, 6,429,949, 6,449,393, 6,476,927, 6,490,696, 6,501,565, 6,519,053, 6,539,323, 6,543,871, 6,546,364, 6,549,294, 6,549,300, 6,550,991, 6,552,815, 6,559,958, 6,572,293, 6,590,676, 6,606,165, 6,633,396, 6,636,326, 6,643,317, 6,647,149, 6,657,741, 6,662,199, 6,678,068, 6,707,563, 6,741,262, 6,748,471, 6,753,845, 6,757,436, 6,757,440, 6,778,700, 6,781,596, 6,816,276, 6,825,943, 6,832,865, 6,836,342, RE33,973, RE36,947, D341,131, D406,117, D416,550, D417,864, D419,185, D426,206, D439,851, D444,793.

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Introduction

Overview

This document covers the steps to receive both finished goods company-owned and finished goods customer-owned inventory for which serialization is required.

Contact Information

EFI Support

US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157
US E-mail:	printstream.support@efi.com

Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

EFI Professional Services

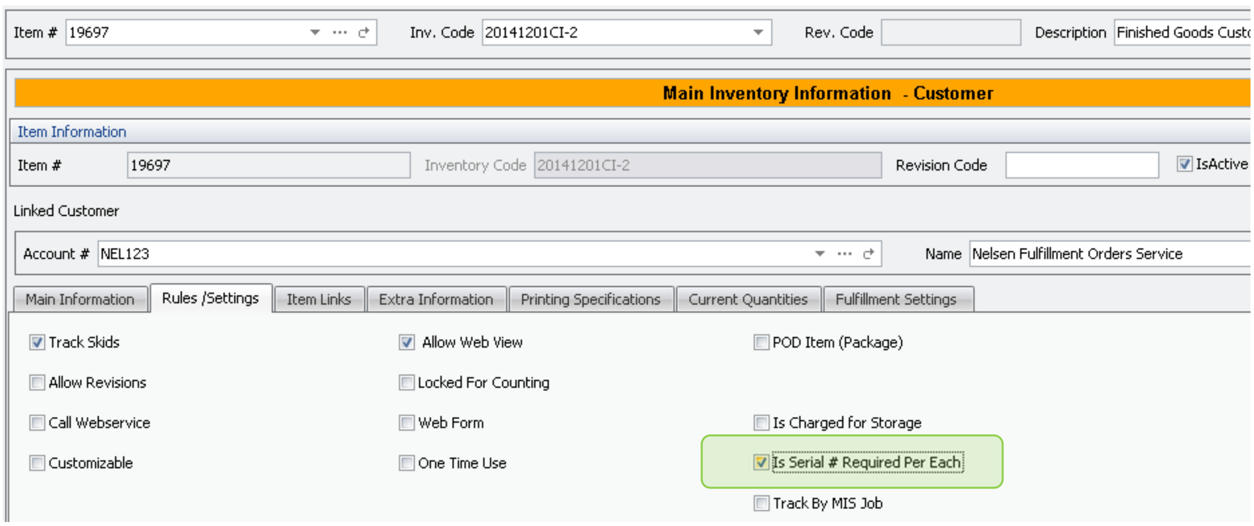
US Phone:	651.365.5321
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

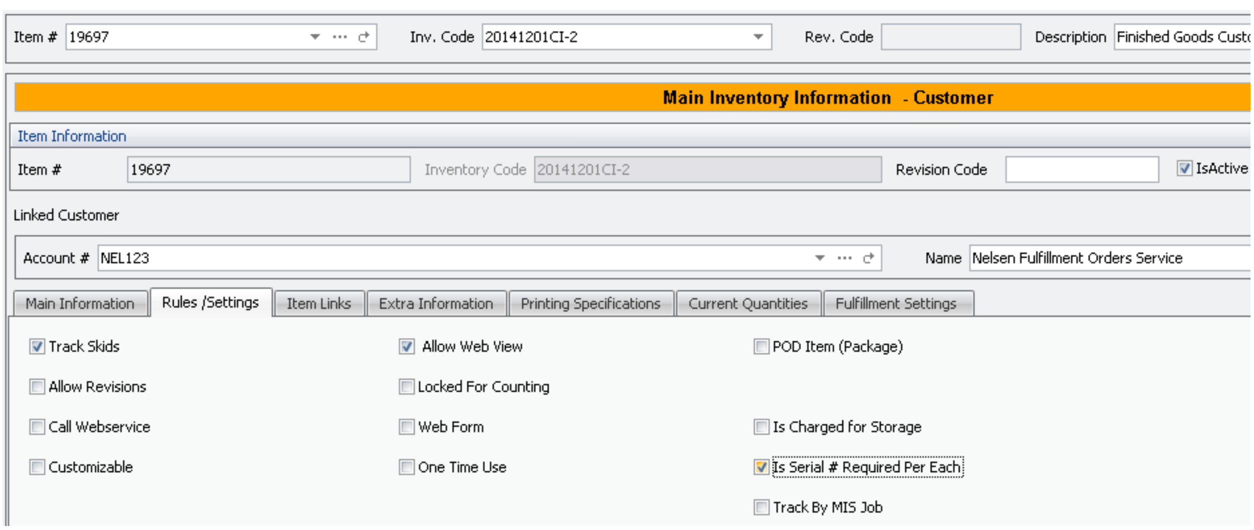
EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.

Setup

Serialization can be done with either customer owned or company owned finished goods items. Serial numbers must be recorded to the database linking the receipted skid ID. In other words the serial numbers are added *after the receipt of the inventory and establishment of the Skid Record (skid ID).* This process maintains the integrity of the serial numbers through skid ID validation during issue.

Serialization is first set on the inventory item Rules/Settings tab in Streamline.Inventory.Manager. Open the program, locate the item(s) in Main Information screen, navigate to the Rules/Settings tab and activate serialization. Click **Save**.

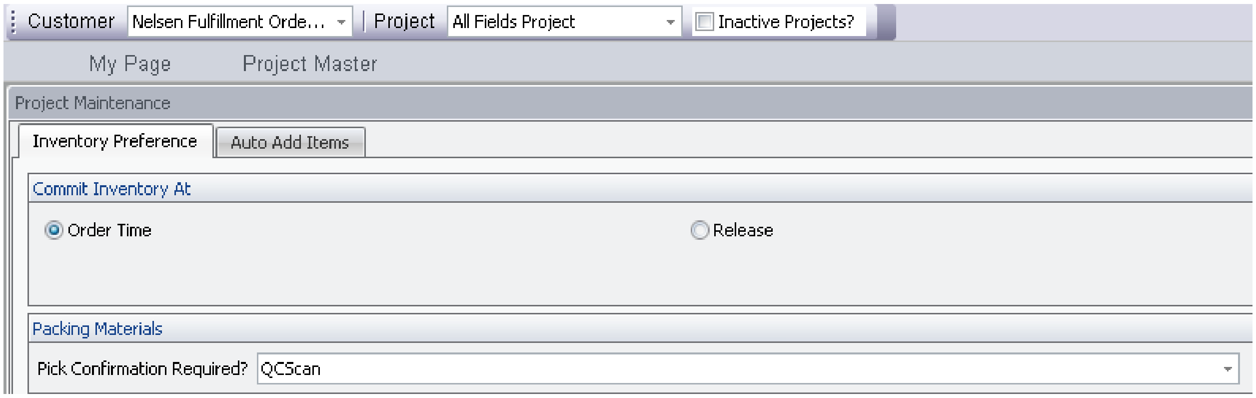




When this checkbox is selected, at receipt of inventory, serial numbers will need to be entered in one of the following ways described in this document.

In addition, the Customer:Project will need to be one with Pick Confirmation Required, as serial numbers at issue are identified through Pick Confirmation and can be done either from the UI or Wireless Warehouse.

The **QC Scan** setting needs to be set in the Project in Inventory Preferences for Pick Confirmation Required.

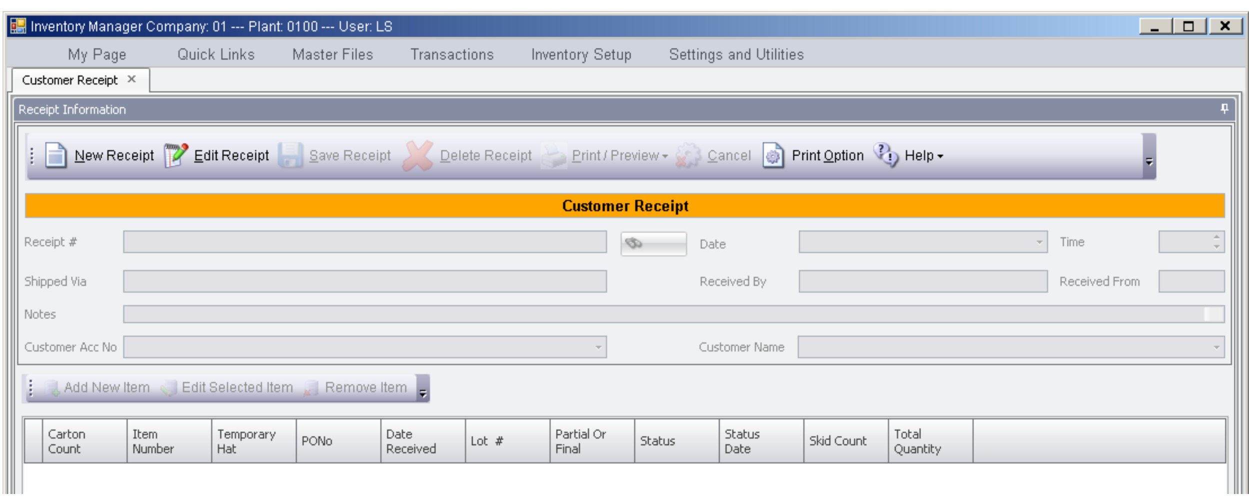


There are no changes to the usual methods of placing and releasing a sales order line with the serialized inventory item.

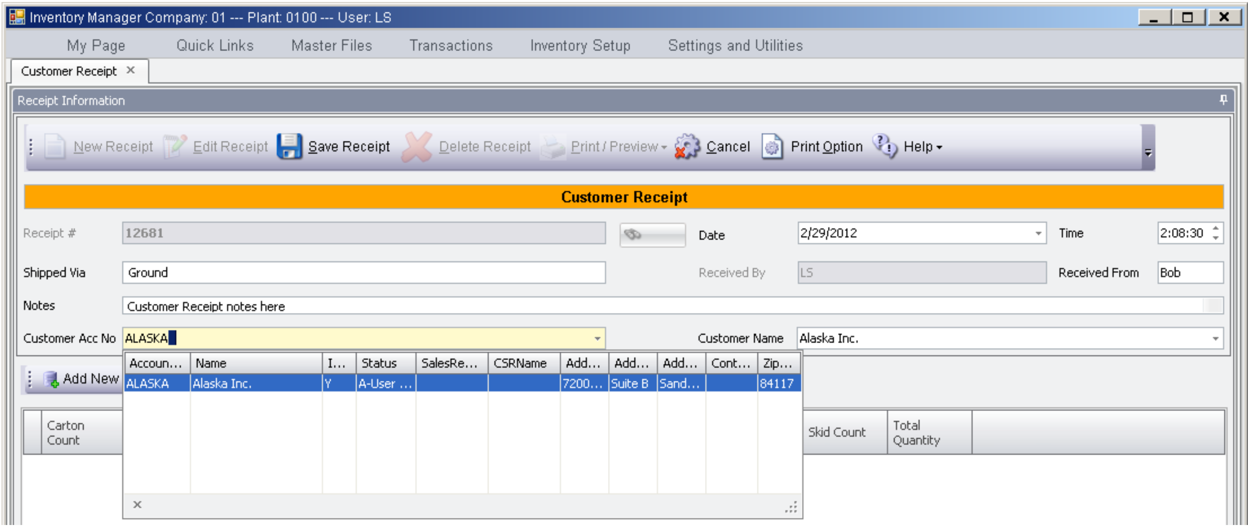
When sales orders are created and released for the serialized inventory, they will be ready to be pick-confirmed and the serial number specific to this ship-to address will be scanned or selected.

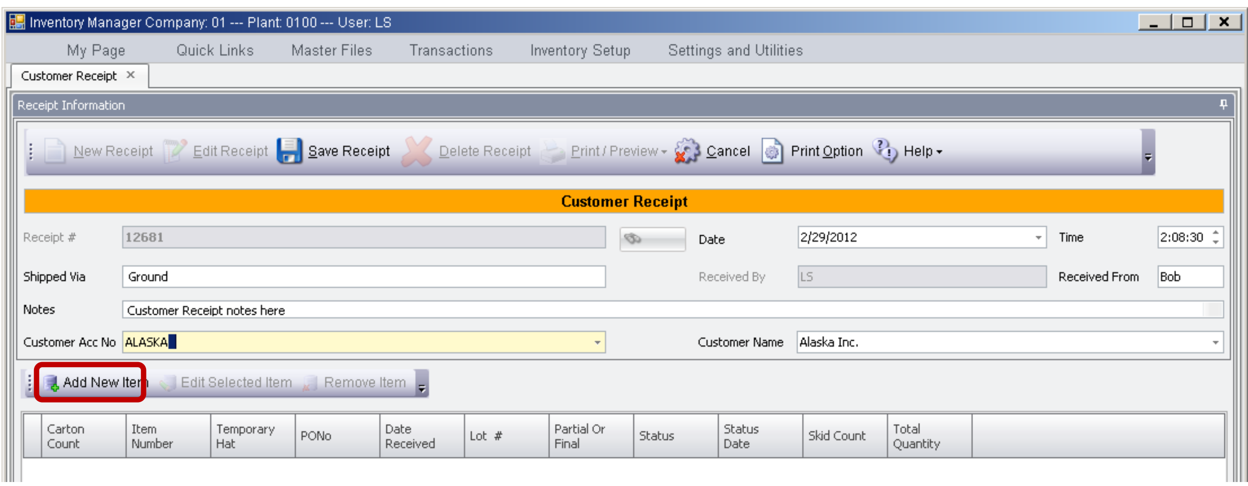
Customer Receipt for Finished Goods Customer Owned Inventory

Clicking on this feature under the Receipts menu bar displays the default screen where a new receipt is entered or an existing receipt is edited. The inventory type must be customer-owned to be able to receive it through Customer Receipt and is the method used to add inventory quantity to a Finished Goods – Customer Owned item. The receipt will update the quantity on hand in PrintStream for the inventory code and push an FGReceipt record to the MIS to update the quantity on hand in the MIS. The two on hand-quantities will be synchronized.

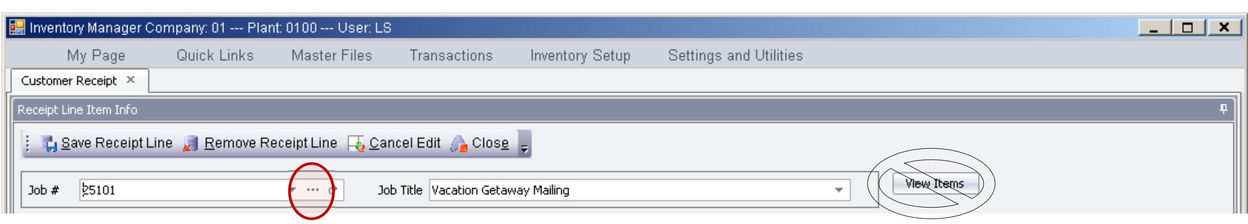


To enter a new receipt, click on the **New Receipt** icon in the horizontal menu bar at the top of the screen. The next Receipt # is populated. Other fields include the Date (which can be changed using the calendar drop) and the time. Complete the Ship Via and Received From and any receiving notes. Select the customer by starting to key in the Customer Account Number or Name and then selecting when it appears.





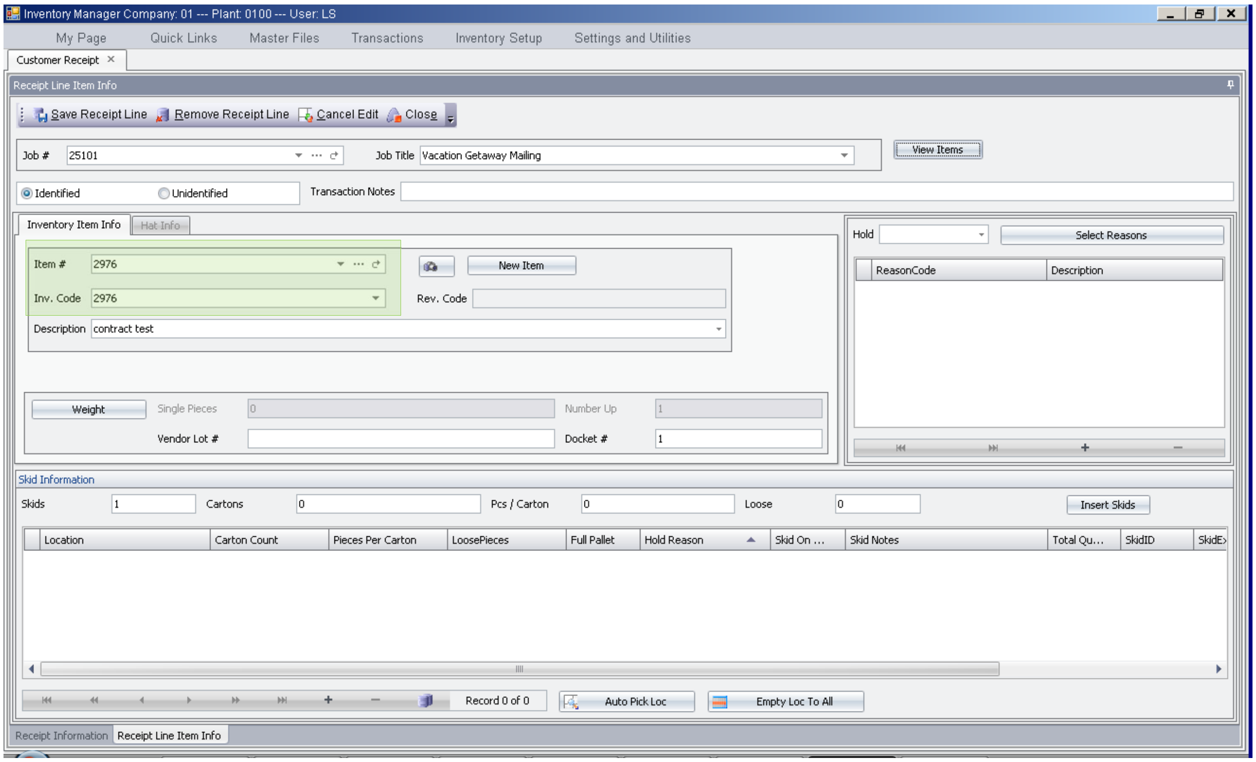
Click **Add New Item** and enter the job number and transaction notes. To look up the job number, click on the '…' icon next to the job number field or simply start keying in the job number that is linked to the customer in the Fulfillment project Jobs page. After keying a single character, hit the down arrow on the keyboard to access a list of possible options. This displayed table can be sorted to further filter the available job numbers for the customer for which the receipt is intended.



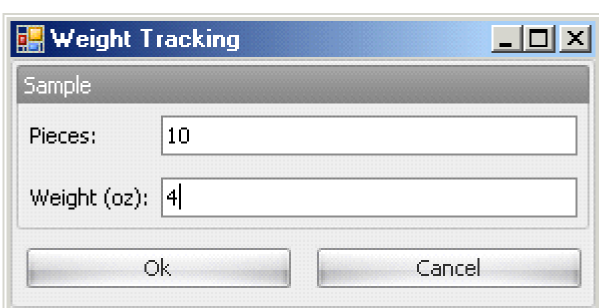
Ignore the View Items button. This is for production jobs in a PrintStream stand-alone environment and is not related to any MIS programming.

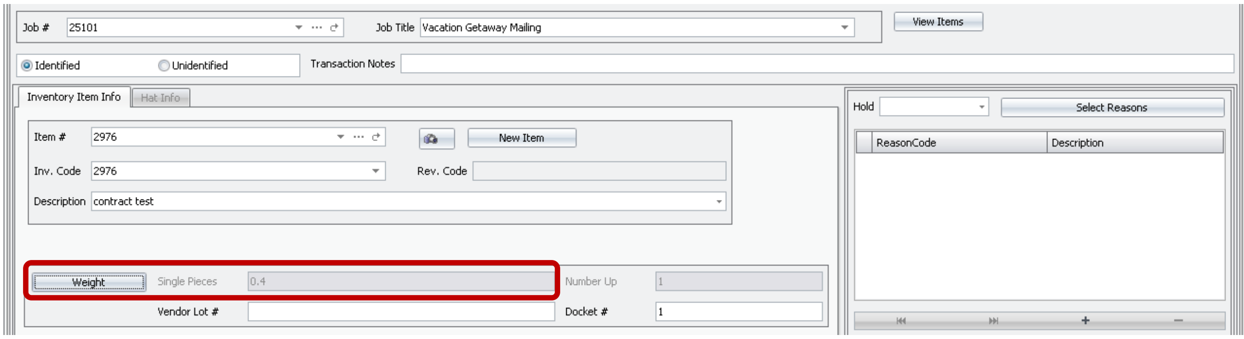
Enter the Inventory Code in the Inv. Code field. The Inventory Code is the Item ID in Pace or the Item ID or Fulfillment Item ID in Monarch. Key the first character of the inventory code and then hit the down arrow on the keyboard to get a listing of all inventory codes that begin with that character. Additional characters entered before the down arrow is hit will refine the displayed list to those characters only.

If you know the PrintStream item # (which is the record number that defines this inventory code in PrintStream), that field may be used to locate the item as well.



When the Weight button is clicked, a screen displays that provides the user with a weight-tracking measurement. Enter the number of sample pieces weighed and the total weight. PrintStream will then calculate the average piece weight for the component being received and populate the Single Piece weight.

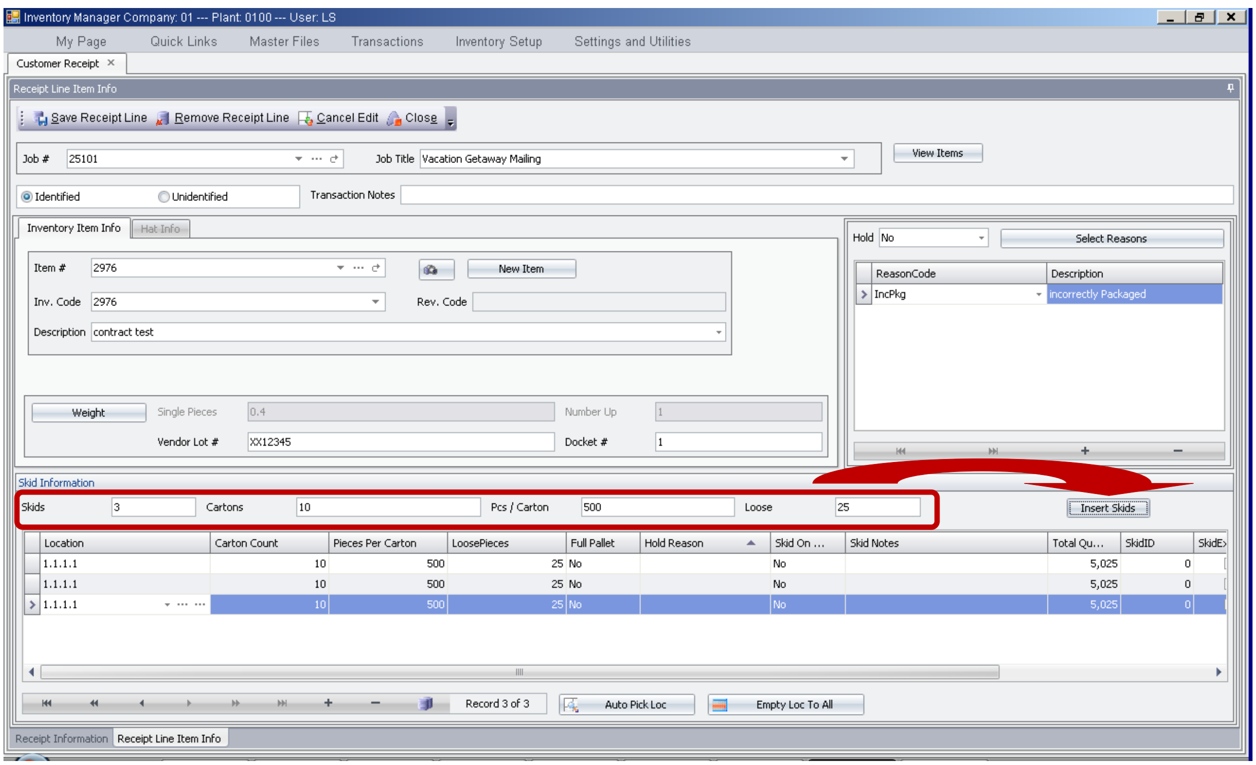




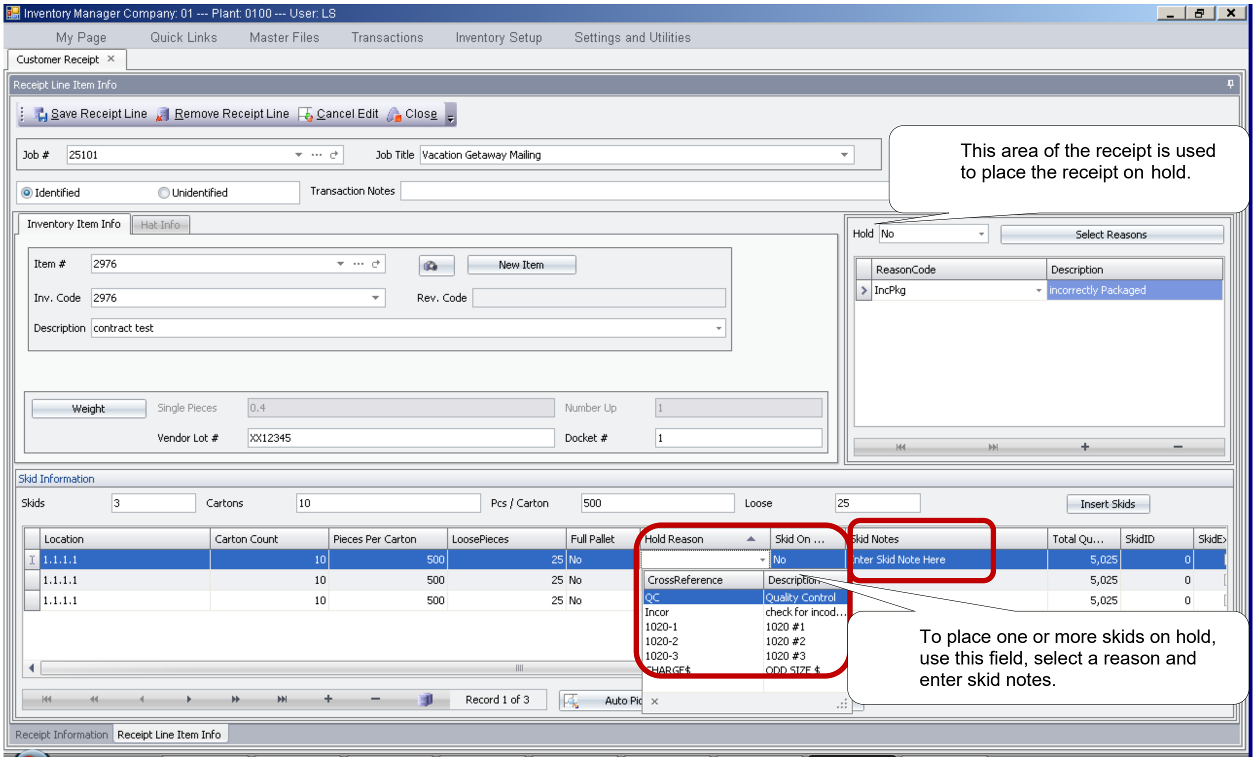
Enter the Vendor Lot # if desired. This is for informational purposes only and is meant to track paper by the lot number from the supplier. This field is not typical for an MIS integrated system.

To the right are codes to place the shipment on hold (‘Yes’ or ‘No’) and select user-defined reasons for this action which can be selected by Code or Description. These codes are set up in Master File Reports. The setup of the skid hold reasons is a separate document which was included in the Documentation folder that was supplied.

Enter the number of skids for the shipment, number of cartons, pieces per carton and loose pieces. Click the **Insert Skids** button.

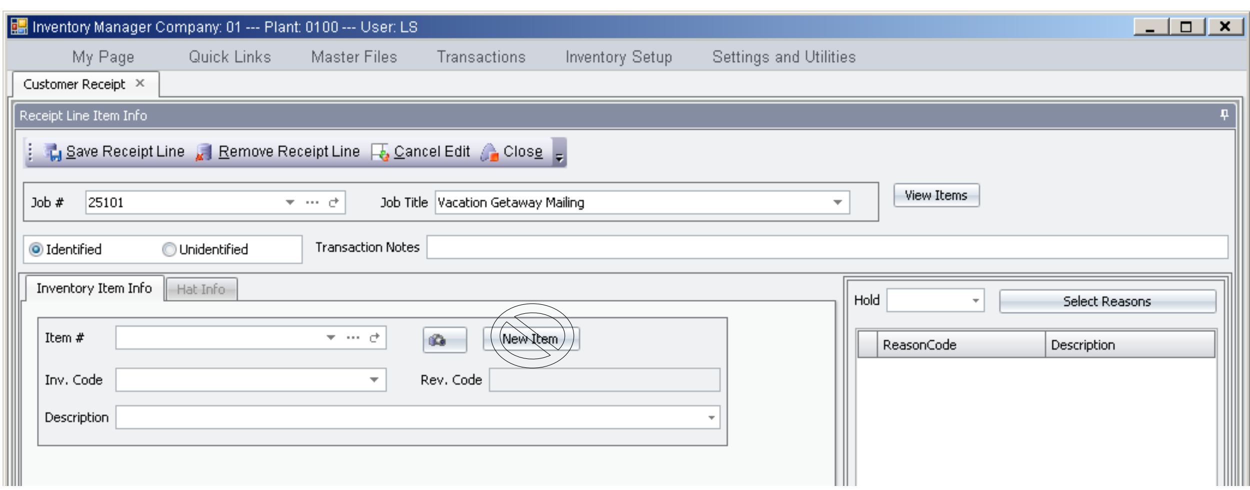


The grid will display with one line item for each skid. Choose a location for each of the skids of material being received. There are three buttons to the right of the Location field: the down arrow displays a list of existing locations (all locations); the second button loads the dropdown with all system locations; and the third button allows the user to search for a location from a displayed grid. After the location is entered or selected from the list for each skid of incoming material, any one or all of the skids may be placed on hold by clicking in the Skid On field in the skid line and changing the default from No to Yes. Skid notes can be entered and Hold Reasons selected.

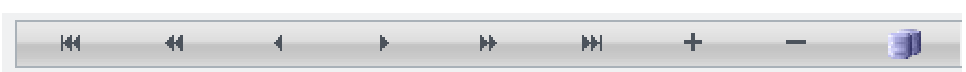


On Hold skids will not allow an issue, ship to customer or ship to vendor to occur until the skid is taken off hold status. A message will display that states this skid cannot be used because it is on hold. The skid can be transferred to a new location, but the new skid ticket will still show the item on hold.

If the item being received does not already have an item number, the user must return to the MIS system to create the item which then synchs to PrintStream. The item will then become available when keyed into the Inv. Code field. The New Item button is programming for the stand-alone application and should be ignored by MIS integration users. This field is overlaid by the 'no' symbol in the screenshot on the following page.



The buttons at the bottom of the displayed skids are to navigate the skid grid. In order from left to right:

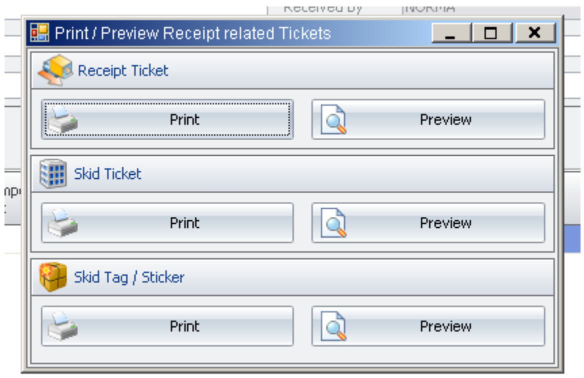


Go to first row, go to previous page, go to previous row, go to next row, go to next page, go to last row, add a blank line, remove (highlighted) line, copy (highlighted line).

Next to these navigational buttons are two location selection helpers. The first one Auto Pick Loc will ask users for the height of the skid. If the location dimensions are in place for the warehouse storage locations, entering the height of the skid will cause the program to search for a space for this skid using the data for the location dimensions. The second button Empty Loc To All provides a grid list of all the empty locations displayed in numerical/alphabetical order. Only locations with zero On Hand Quantity will be visible in this display. This grid, like any other .net grid has controls for further filtering to assist with finding the best location for the storage of the inventory.

Once the skids are all detailed with the quantities, click the Save Receipt Line in the horizontal tool bar at the top of the screen. Then click Save Receipt.

The Print / Preview Receipt related Tickets window will display.

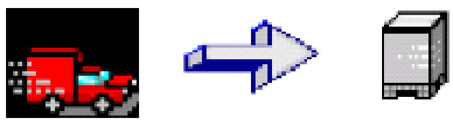


This is an example of the Receipt Ticket:

Streamline Solutions
100 American Way

DETROIT MI

Entered By: NORMA
Entered Date: 05/28/2010
Entry Time: 12:44 PM



Receipt Date

05/28/2010

Receive Inventory to Warehouse

Receipt #: 5817

Customer	NELS	Nelsen Fundraisers 5331 W. Jackson Drive SEWARD NE 68434

76408 — **Letter 4068**

Letter 4068

Inventory Item #	*Inventory Code / Description*
Shipped Via...	Ground
Received From..	Crete Carrier
Job Number. 4101	Shop Floor Demo 2 Personalized 8.5 x 11 letter and insert with PIH4C brochure into #10 OE
Salesrep / CSR...	Norma Nelsen / Norma Nelsen
Sample Weight.	Weight of piece = 2

Receipt Notes...

Reason Code ...

The following Inventory was Received

Lot	*Location*	*Skid ID#*	*Cartons*	*Pcs/Ctn*	*Loose*	*Total Quantity*
0	S.01.3	**30590**	**10**	**5000.00**	**0.00**	**50000.00**
0	S.01.3	**30591**	**10**	**5000.00**	**0.00**	**50000.00**
Total			**20**			**100000.00**

The skid tickets:

Skid ID # 30590 — Skid Ticket — 30590

Customer # : Name — NELS : Nelsen Fundraisers

Item # 76408

Inventory Code/ Description — Letter 4068 — Letter 4068

Location S.01.3

Lot	Cartons	Pcs/Ctn	Loose	Total Quantity
0	10	5000	0	50000

Skid ID # 30591 — Skid Ticket — 30591

Customer # : Name — NELS : Nelsen Fundraisers

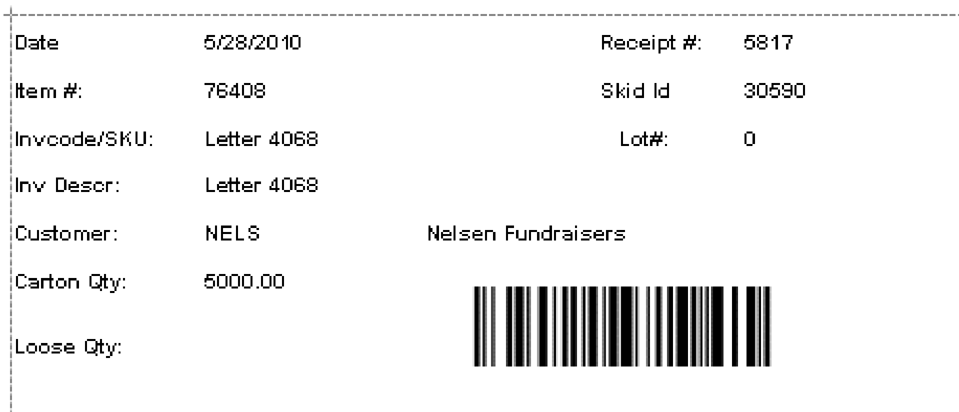
Item # 76408

Inventory Code/ Description — Letter 4068 — Letter 4068

Location S.01.3

Lot	Cartons	Pcs/Ctn	Loose	Total Quantity
0	10	5000	0	50000

And the skid tags:

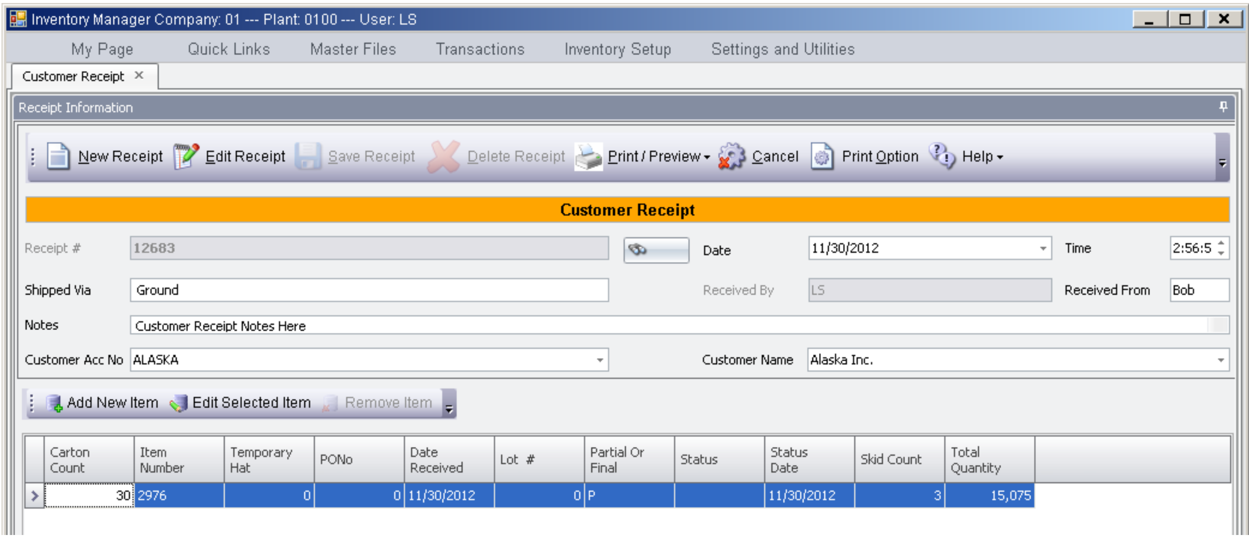


Date	5/28/2010		Receipt #:	5817
Item #:	76408		Skid Id	30590
Invcode/SKU:	Letter 4068		Lot#:	0
Inv Descr:	Letter 4068			
Customer:	NELS	Nelsen Fundraisers		
Carton Qty:	5000.00			
Loose Qty:				

If the ticket that displays is not the preferred ticket option, another default selection can be made in the Ticket Designer screen in the Inventory Setup menu. This topic is covered in greater detail in the setup documentation that can be found in the Documentation folder.

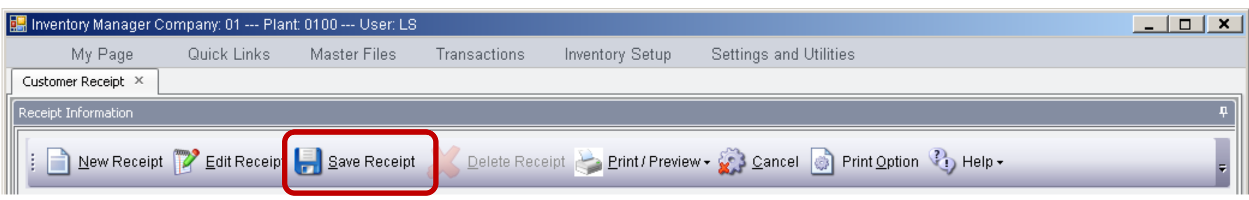
When the window for the receipt tickets is closed, the user is returned to the ‘Receipt Information’ tab to either edit the receipt or create a new receipt.

To edit the receipt, click on the line item in the lower half of the grid and then click on **Edit Selected Item**.



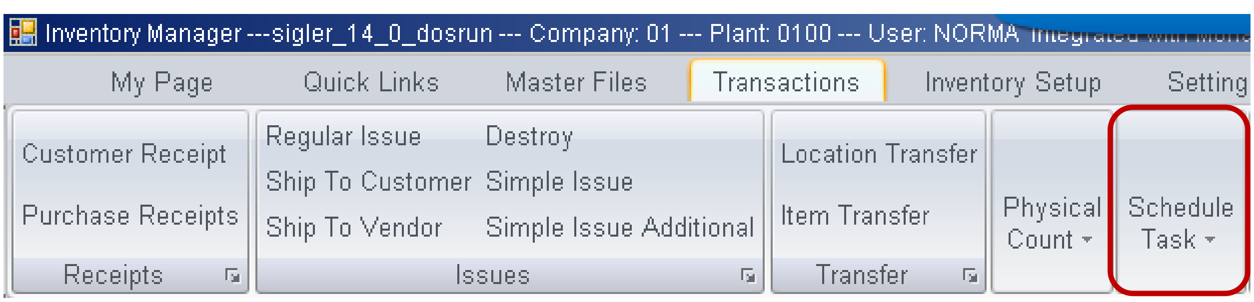
Make the necessary edits to the receipt details and 'Save the Receipt Line.' The user will again be back at the Receipt Information tab.

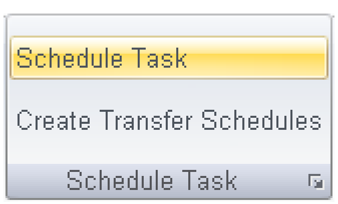
When the receipt is ready to save, click **Save Receipt** in the horizontal menu bar at the top of the screen.



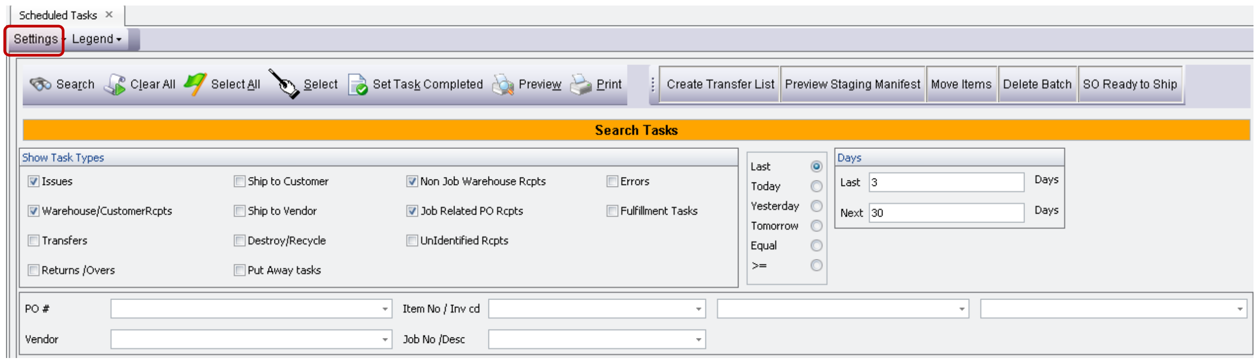
PO Receipt (FGARN) for Finished Goods Company Owned Item

Scheduled Tasks is located in the Transactions menus of the inventory program. In the Transactions menu, find Schedule Tasks and navigate to Schedule Tasks program.

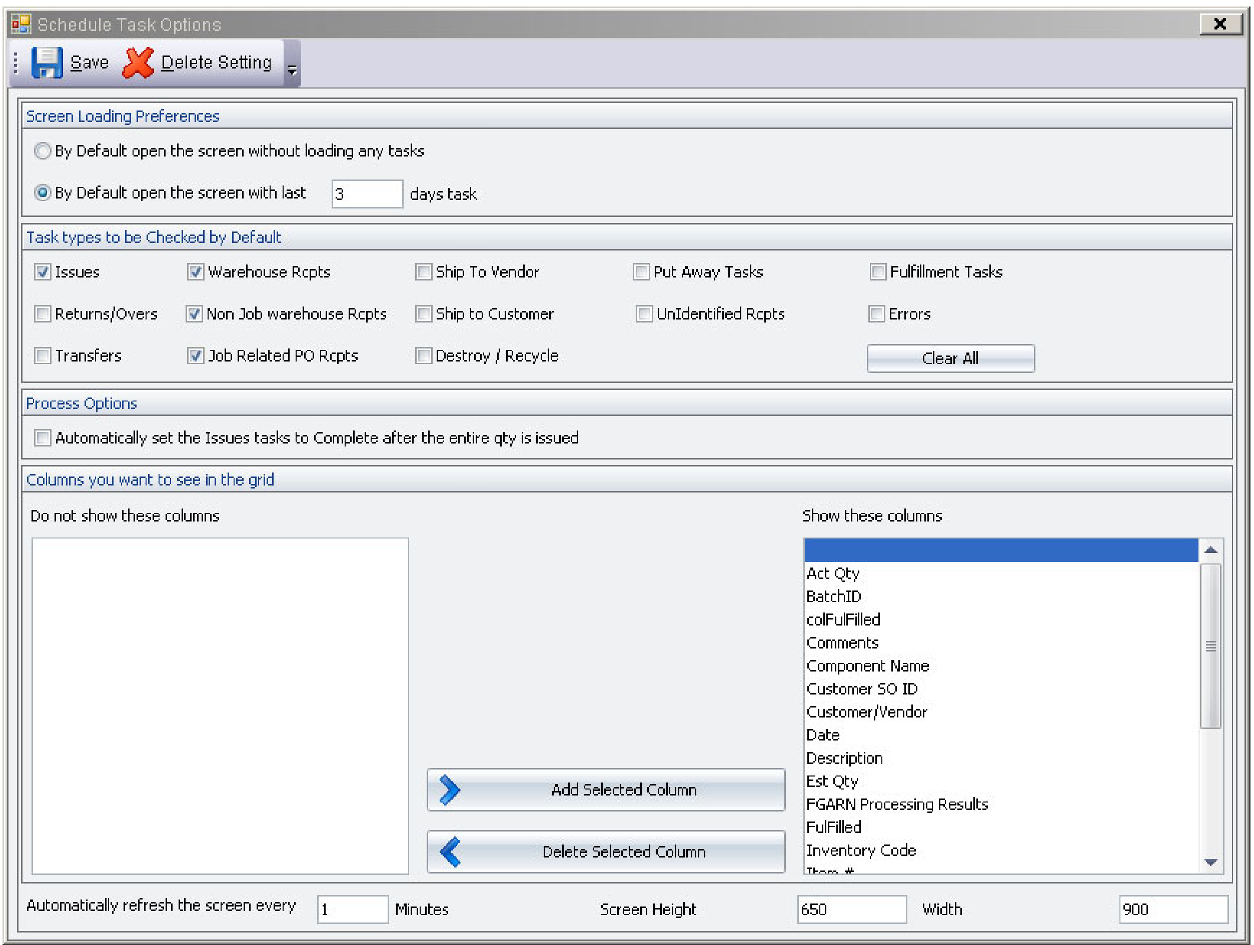




When the program launches, users will see a horizontal menu bar, a task-type search filter and specific fields to help refine the search. The Scheduled Tasks screen can display all inventory related transactions that are spawned by an MIS job or inventory request.



To customize how the Schedule Task screen displays when the program is launched users can define what is displayed using the Settings menu located directly under the Scheduled Tasks tab at the top of the screen. Click Settings to display the available options for each PrintStream user account.



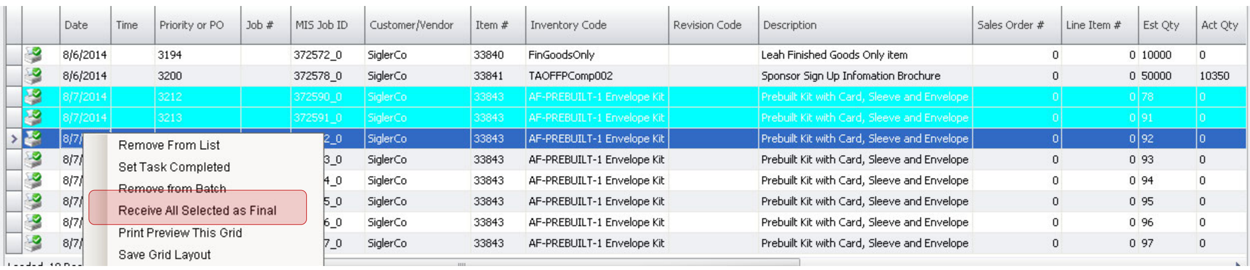
Screen Loading Preferences – By Default open the screen without loading any tasks: When this option is selected, the screen will open with no tasks loaded. Users will need to toggle the tasks they would like displayed each time they open the screen or they may Select All for all task types.

Screen Loading Preferences – By Default open the screen with last ____ (number of days) days tasks: When this option is selected, the screen will open with tasks dated the specified number of days and then out 30 days from today's date.

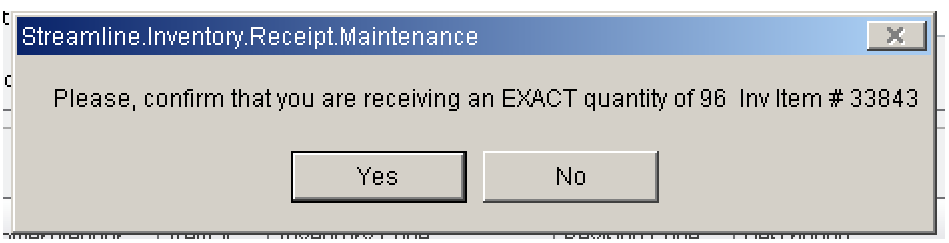
The next area labeled Task Types to Be Checked by Default is where users may select which task types automatically load when the program is launched. Receiving Department may only care to have tasks for receipts loaded for example.

Non Job Warehouse Rcpts: This task type is specific to the automatic receipt notification for finished goods items that were produced or purchased through the MIS system. The task type is referred to as an FGARN and identifies the inventory that are finished goods items being produced in house or purchased from outside that will then be received into inventory for use on Fulfillment sales orders. POD / Direct Order Items will be produced based on the Monarch or Pace job and will send the FGARN. The FGARN will display when the Non Job Warehouse Rcpts box is checked in the Task Types above.

There are a couple of ways to receive the inventory using the Scheduled Tasks screen. Users may choose to have this task type along with other tasks types displayed as scheduled tasks. There is special programming that can be taken advantage of if the only task type selected is the Non Job Warehouse Rcpts. If only this box is checked and the grid is loaded with ready to receive FGARNs, the user can highlight the receipt lines he/she would like to receive in and do a "global receipt" for all selected items at the same time. Simply highlight the lines to receive (they will turn light blue in color) and then right-click and choose "Receive All Selected as Final."



The light blue lines along with the dark blue line are selected receipt tasks for the global receipt application. After selecting the lines (users may use left-click and use the shift key or CTRL keys to choose the receipt tasks), users will right-click and make the selection to Receive All Selected as Final. Quantity validation can be activated in the PrintStream database if your company decides they want to use this validation.



Choosing Yes allows users to proceed and the receipt is completed. The selected tasks disappear from the Scheduled Task screen. Note: This exact-quantity confirmation message is optional and is triggered by a setting in the System Level | Item Creation Settings Confirm FGARN Quantity at Receiving.

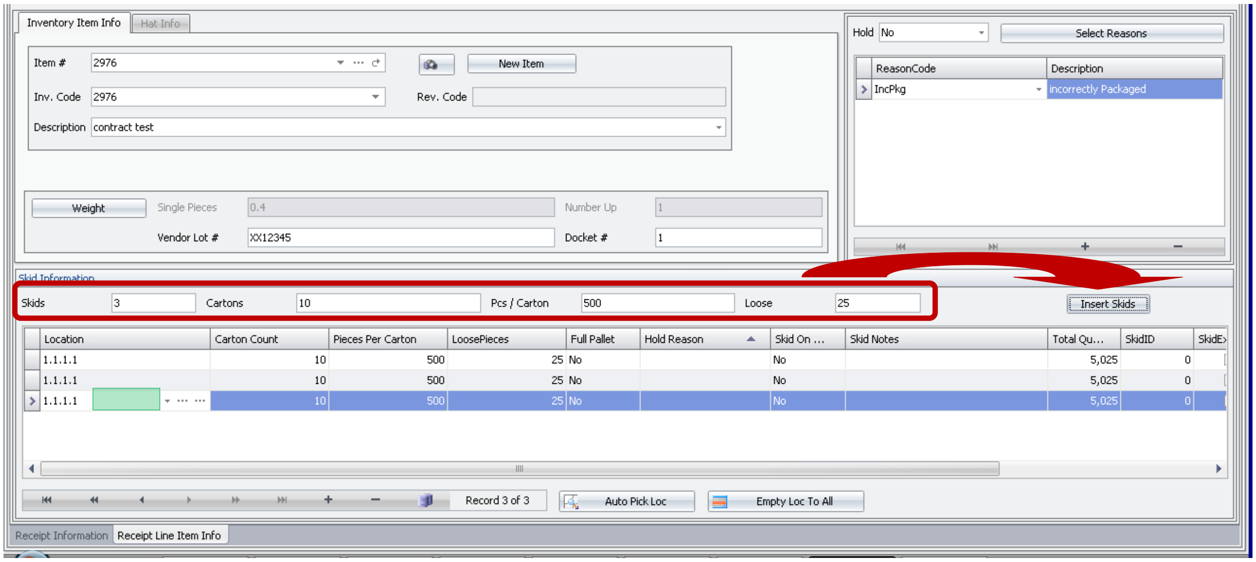
This global receipt method receives the inventory into the default location for the item.

If you want to be able to specify the location that the inventory will be received into, use the one-at-a-time method where users have more control over the quantity received, skid hold controls and storage location.

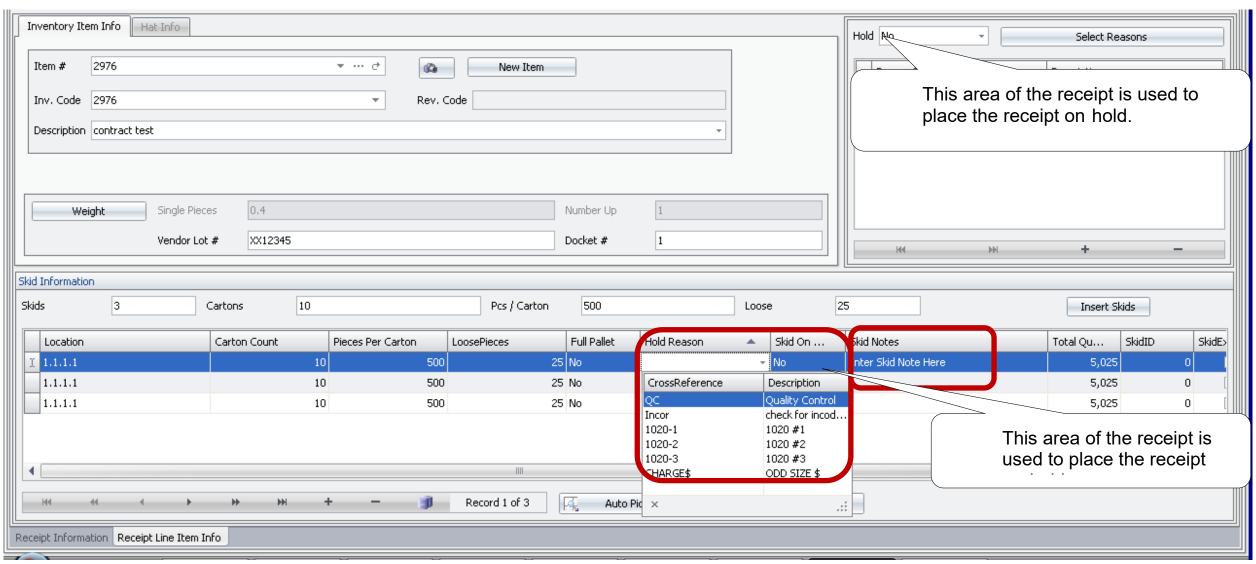
The single-line method requires the user to find the FGARN they seek, double-click the line that represents the receipt and complete it.

Enter the number of skids for the shipment, number of cartons, pieces per carton and loose pieces. Click the Insert Skids button.

The default location will display in each skid line in the skid details grid. Change the skid location for any of the skid lines to receive additional stock to an overstock or other location and into the default pick location.

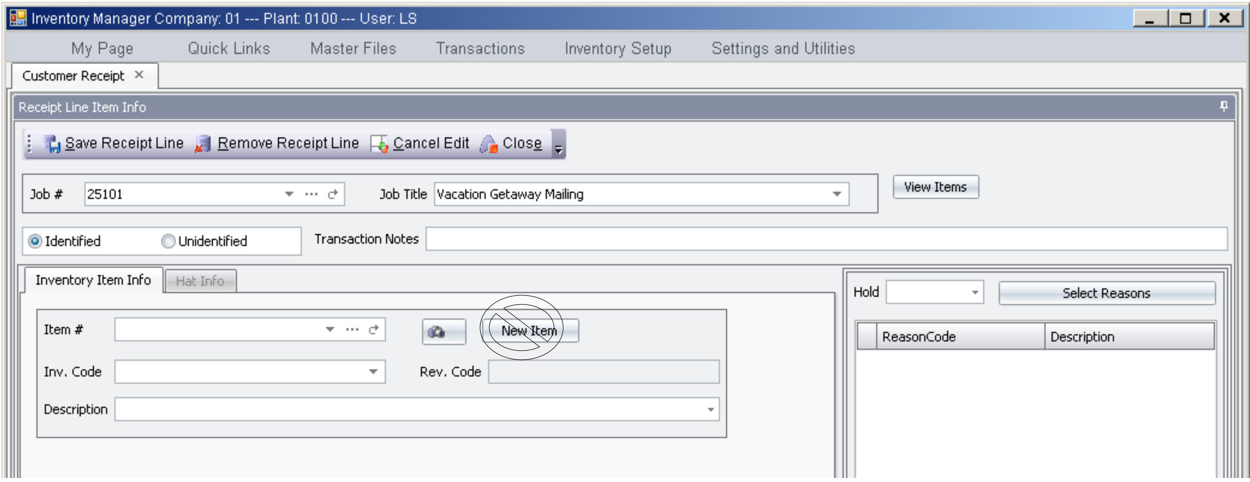


There are three buttons to the right of the Location field (highlighted in green above): the down arrow displays a list of existing locations (all locations); the second button loads the dropdown with all system locations; and the third button allows the user to search for a location from a displayed grid. After the location is entered or selected from the list for each skid of incoming material, any one or all of the skids may be placed on hold by clicking in the Skid On field in the skid line and changing the default from No to Yes. Skid notes can be entered and Hold Reasons selected.

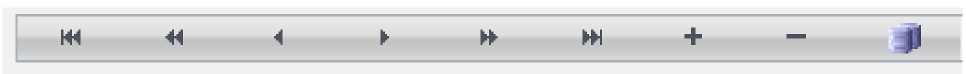


On Hold skids will not allow an issue, ship to customer or ship to vendor to occur until the skid is taken off hold status. A message will display that states this skid cannot be used because it is on hold. The skid can be transferred to a new location, but the new skid ticket will still show the item on hold.

If the item being received does not already have an item number, the user must return to the MIS system to create the item which then synchs to PrintStream. The item will then become available when keyed into the Inv. Code field. The New Item button is programming for the stand-alone application and should be ignored by MIS integration users.



The buttons at the bottom of the displayed skids are to navigate the skid grid. In order from left to right:

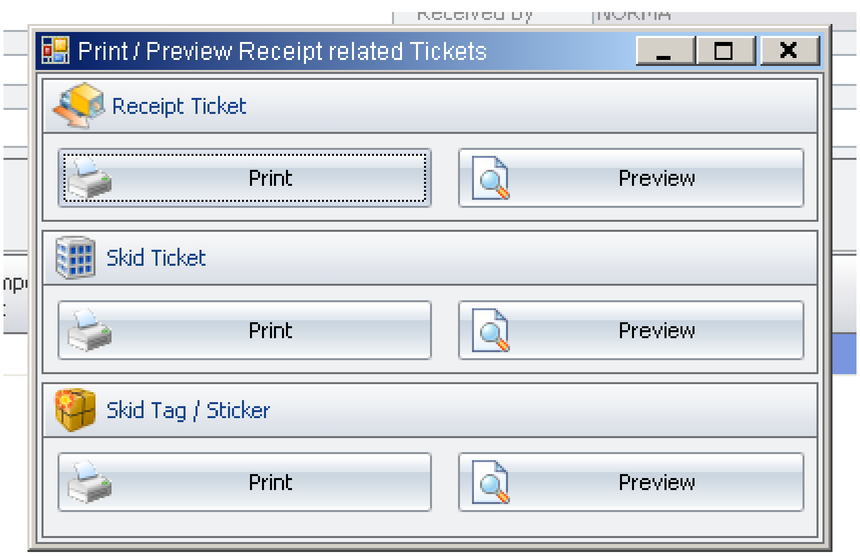


Go to first row, go to previous page, go to previous row, go to next row, go to next page, go to last row, add a blank line, remove (highlighted) line, copy (highlighted line).

Next to these navigational buttons are two location selection helpers. The first one Auto Pick Loc will ask users for the height of the skid. If the location dimensions are in place for the warehouse storage locations, entering the height of the skid will cause the program to search for a space for this skid using the data for the location dimensions. The second button Empty Loc To All provides a grid list of all the empty locations displayed in numerical/alphabetical order. Only locations with zero On Hand Quantity will be visible in this display. This grid, like any other .net grid has controls for further filtering to assist with finding the best location for the storage of the inventory.

Once the skids are all detailed with the necessary information, click the Save Receipt Line in the horizontal tool bar at the top of the screen. Then click Save Receipt.

The Print / Preview Receipt related Tickets window will display.



Select the options for printing the Receipt Ticket, Skid Ticket and Skid Stickers (box labels).

Receiving Customer Owned Inventory Identified as Serialized

See this document for detailed information on receiving customer owned inventory.

During the customer receipt of the item, the first step is to Final receive the quantities and select the location for storage.

Complete the customer receipt header details, click Add New Item and complete the skid and location details as detailed earlier in this document. Click Save Receipt Line.

Users will then be switched back to the Receipt Information tab. Click **Save Receipt**.

Once the receipt is finalized, go to the Audit Trail for this customer item and locate the receipt line. Scroll to the right until the Skid ID appears. Note the Skid ID as you will need this later to identify the serial number for each piece.

Receiving Company Owned Inventory Identified as Serialized

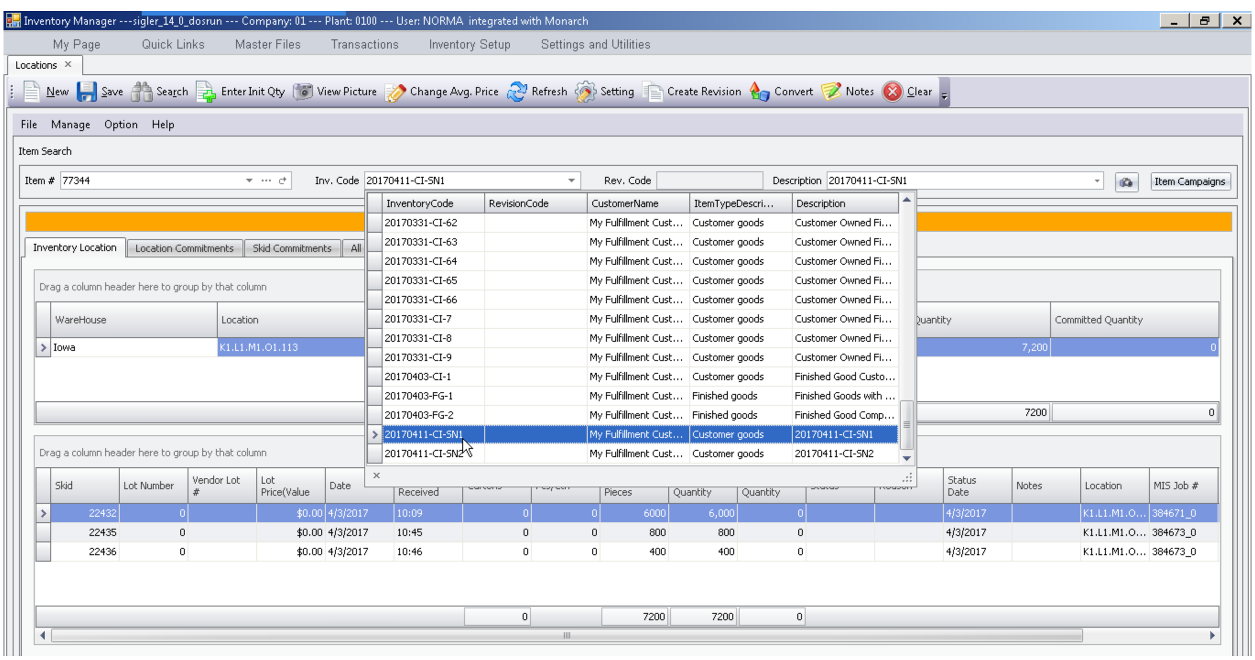
See this document for detailed information on receiving company owned inventory.

During the receipt of the FGARN from the scheduled task screen, the first step is to Final receive the quantities and select the location for storage. This step is done exactly as any other finished goods company owned inventory item receipt.

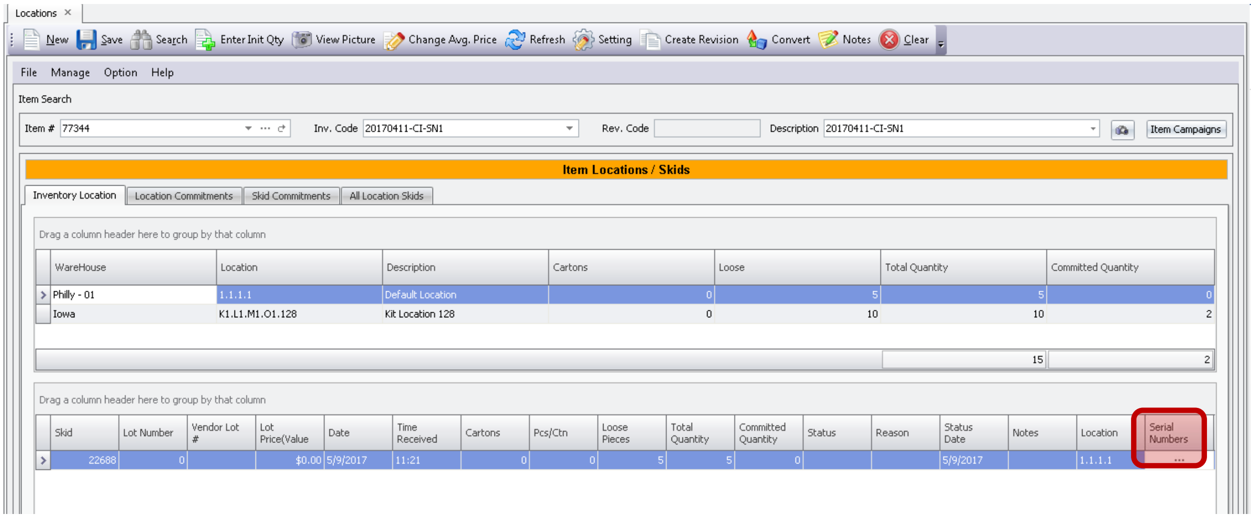
Once the receipt is finalized at PO Receipt, go to the Audit Trail for this finished goods item and locate the receipt line. Scroll to the right until the Skid ID appears. Note the Skid ID as you will need this later to identify the serial number for each piece.

Adding Serial Numbers from Edit Receipt

To add the serial numbers for either type of receipt (both customer-owned and company-owned stock), go to Transactions | Locations and enter the item number or inventory code for the serialized inventory just received.

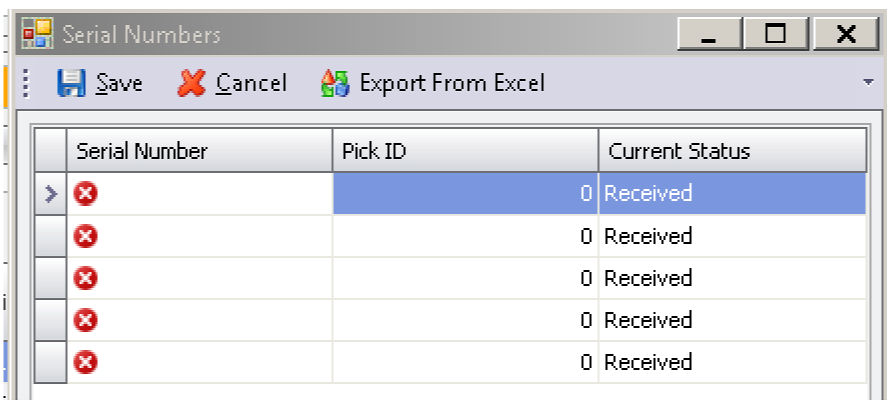


Select the skid in the top grid displayed for which serial numbers will be entered. The skid detail will display in the bottom grid. Within the skid line in the bottom grid is the field Serial Numbers with an ellipsis.



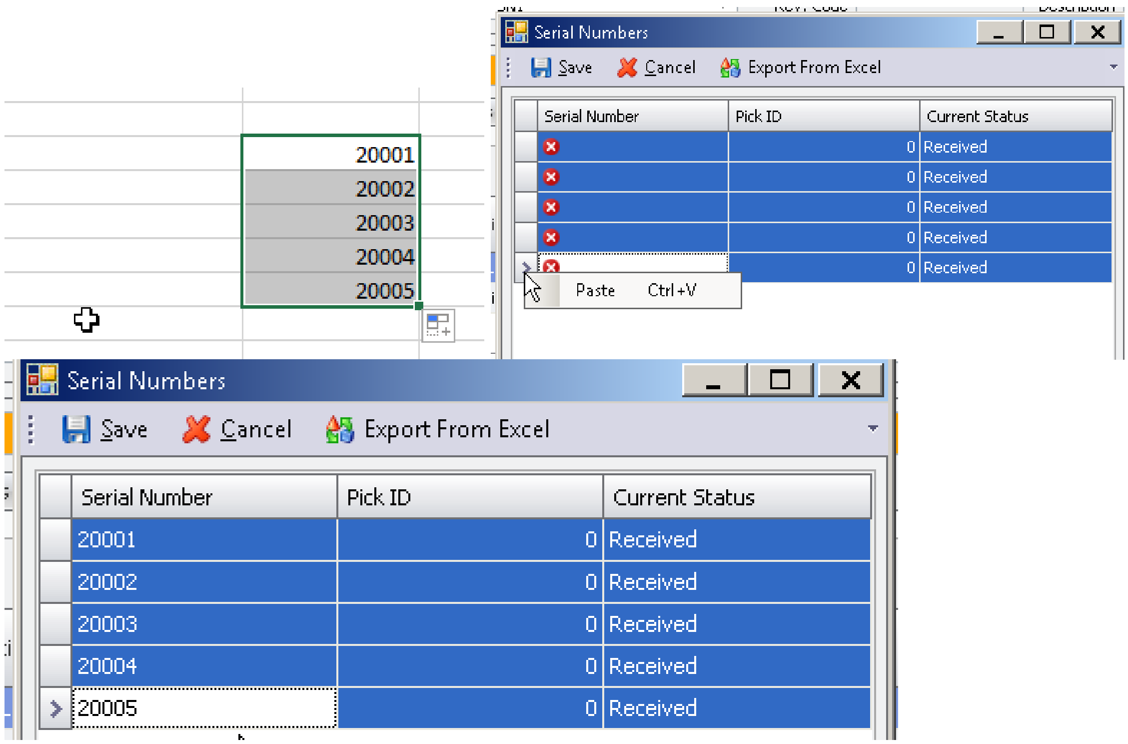
Click the ellipsis. A grid displays with the number of serial numbers based on the quantity received.

If a quantity of five is received, the grid will have five lines.



At this point depending on the number of serial numbers that need to be entered, you can choose one of the following options:

1. Hand key each serial numbers into each field;
2. Copy the serial numbers from an existing spreadsheet that the customer provided with the serialized inventory and paste it into the field using Excel spreadsheet controls.

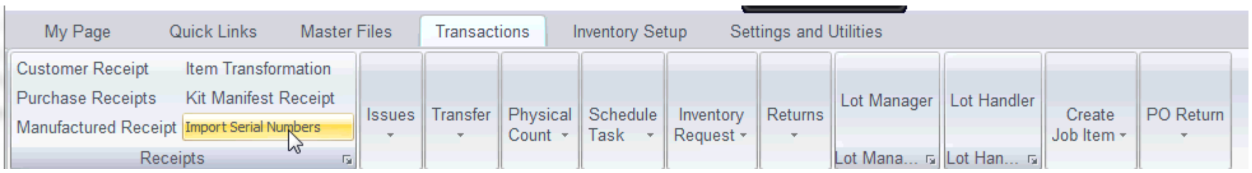


3. Click Save to save the serial numbers or cancel to begin again.

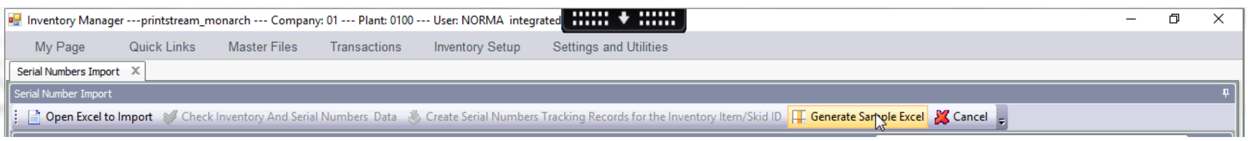
This grid can be exported back into Excel using the supplied button in the menu bar.

Importing Serial Numbers

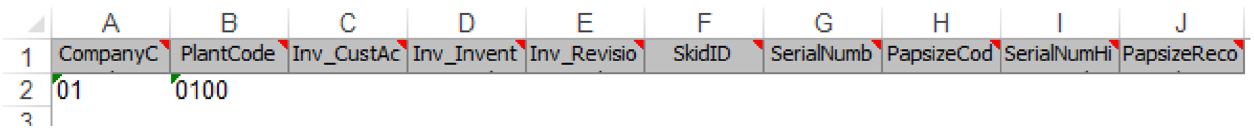
Serial numbers can also be imported into PrintStream. In the Transactions menu, navigate to Import Serial Numbers.



When the program launches, click Generate Sample Excel to save an Excel file with the required fields.

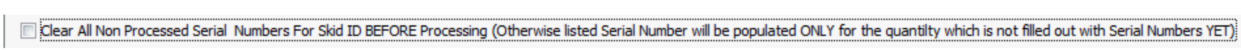


The import file contains 10 columns, 7 of which are filled in by the user.



- Column A is the Company Code for this PrintStream database.
- Column B is the Plant Code for this PrintStream database.
- Column C is the Customer Account Number for which the serial numbers will be imported.
- Column D is the Inventory Code for which the serial numbers are to be recorded.
- Column E is the Revision Code of this Inventory Code for which the serial numbers are to be recorded.
- Column F is the **Skid ID of the Receipt** for which the serial numbers are to be recorded. Get this from the receipt transaction of the audit trail.
- Column G is the serial number for this record. There will be one line for each serial number to be recorded for each inventory code/revision code combination that shares the same Skid ID.
- Columns H, I and J will auto fill as the program finishes preparing the file.

Check the following to clear any serial numbers for the skid ID that are unused before processing.



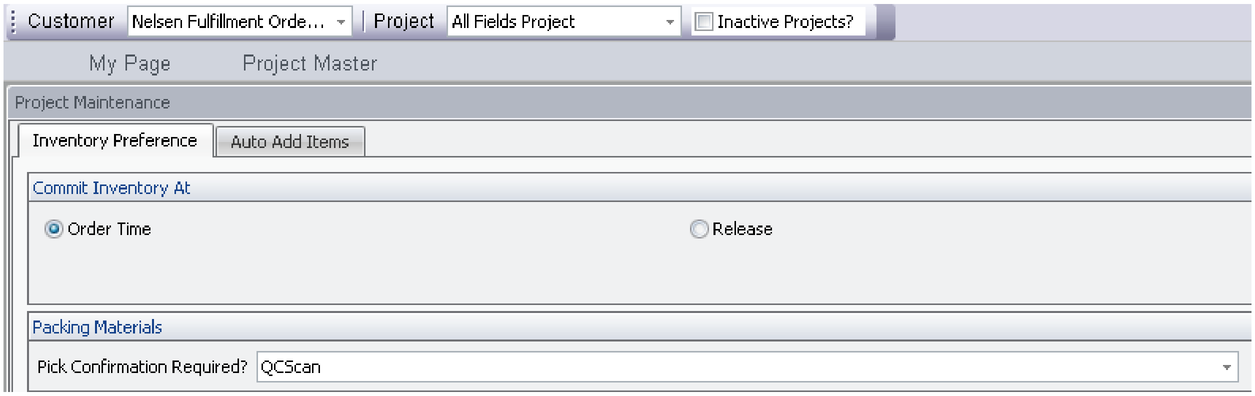
Open the prepared Excel file from its saved location.

Click Check Inventory And Serial Number Data. The remaining columns H through J auto fill at this step after validating the PAPSIZE CODE, serial number history and PAPSIZE RECORD ID.

Last step is to click the Create Serial Numbers Tracking Records for the Inventory Item/Skid ID.

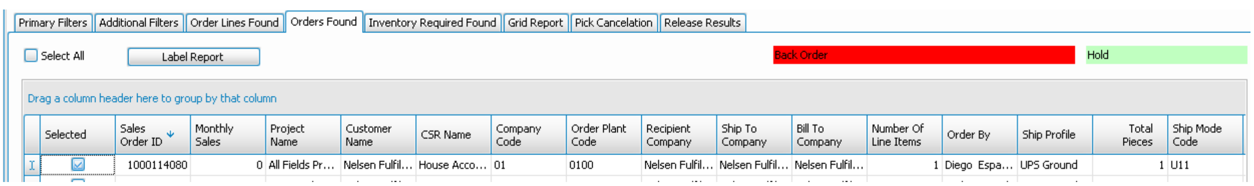
Serialization can be done with either customer owned or company owned finished goods items. Serial numbers must be recorded to the database linking the receipted skid ID. In other words the serial numbers are added *after the receipt of the inventory and establishment of the Skid Record (skid ID).* This process maintains the integrity of the serial numbers through skid ID validation during issue.

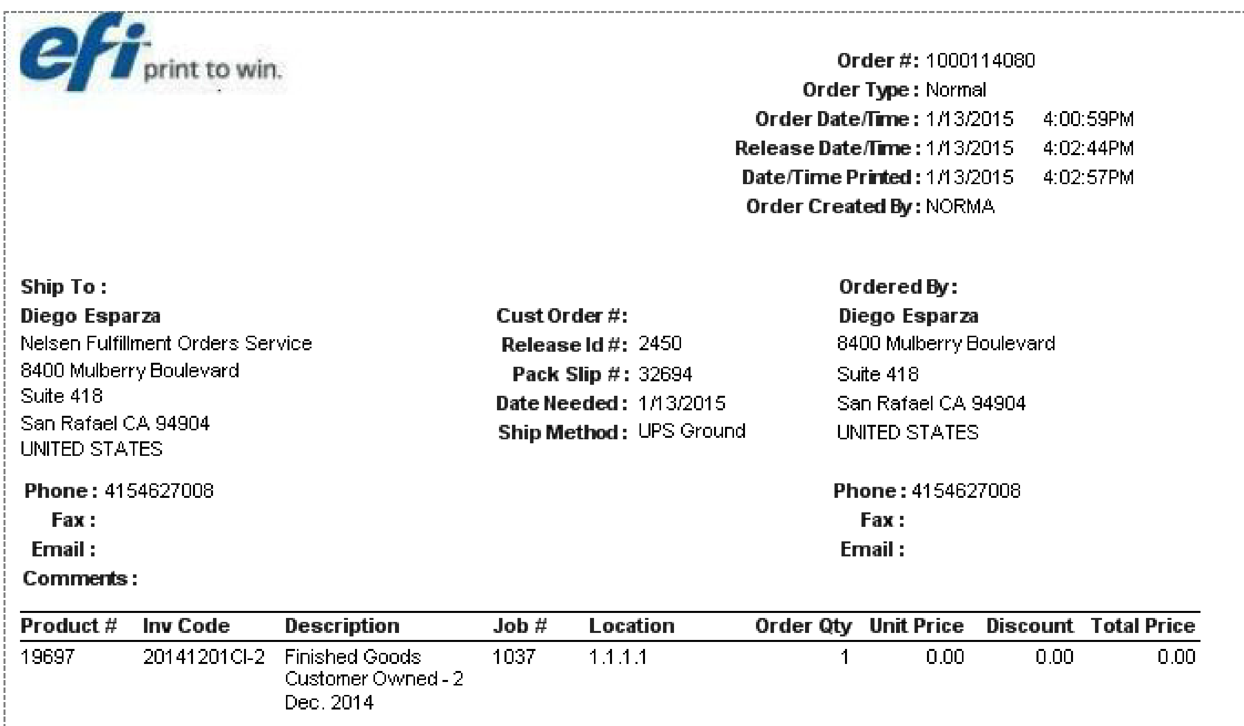
As indicated earlier, the QC Scan setting needs to be set in the Project in Inventory Preferences for Pick Confirmation Required.



There are no changes to the usual methods of placing and releasing a sales order line with the serialized inventory item.

When sales orders are created and released for the serialized inventory, they will be ready to be pick-confirmed and the serial number specific to this ship-to address will be scanned or selected. This can be done using the UI or the Wireless module.





efi print to win.

Order #: 1000114080
Order Type: Normal
Order Date/Time: 1/13/2015 4:00:59PM
Release Date/Time: 1/13/2015 4:02:44PM
Date/Time Printed: 1/13/2015 4:02:57PM
Order Created By: NORMA

Ship To:
Diego Esparza
Nelsen Fulfillment Orders Service
8400 Mulberry Boulevard
Suite 418
San Rafael CA 94904
UNITED STATES

Cust Order #:
Release Id #: 2450
Pack Slip #: 32694
Date Needed: 1/13/2015
Ship Method: UPS Ground

Ordered By:
Diego Esparza
8400 Mulberry Boulevard
Suite 418
San Rafael CA 94904
UNITED STATES

Phone: 4154627008
Fax:
Email:
Comments:

Phone: 4154627008
Fax:
Email:

Product #	Inv Code	Description	Job #	Location	Order Qty	Unit Price	Discount	Total Price
19697	20141201CI-2	Finished Goods Customer Owned - 2 Dec. 2014	1037	1.1.1.1	1	0.00	0.00	0.00

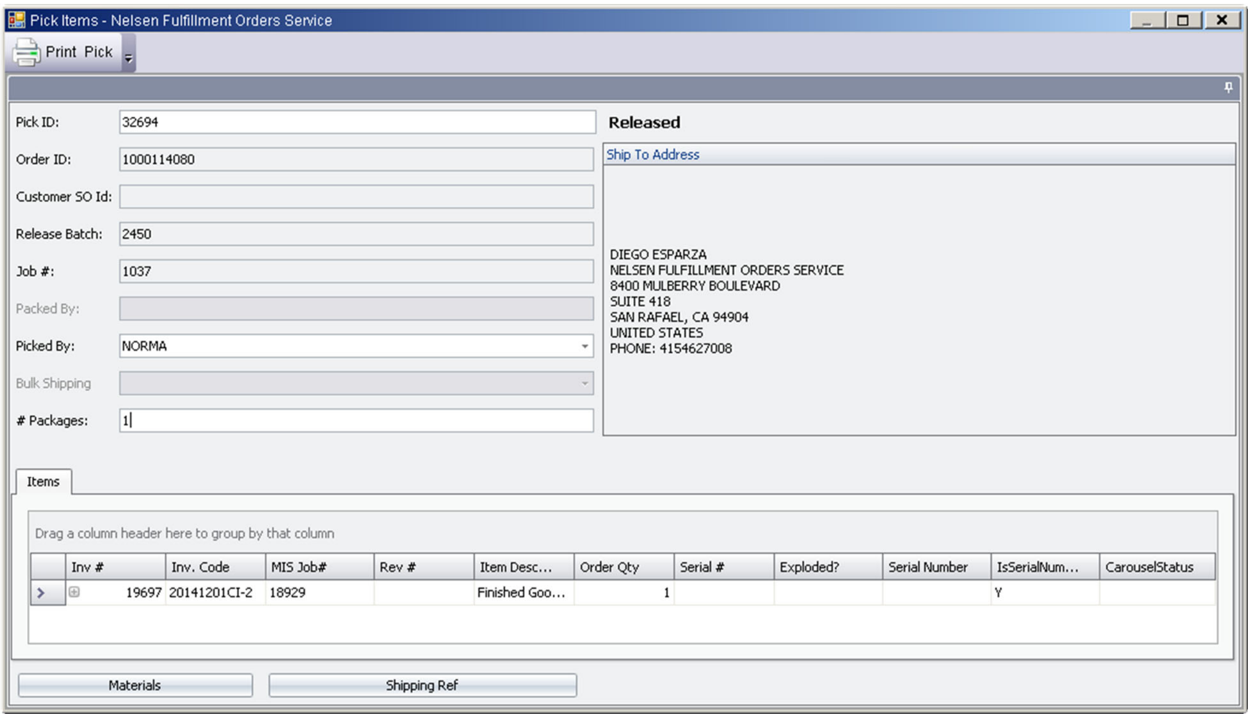
Stock Pull Skids Summary Report — Date/Time Printed : 1/13/2015 4:03:46PM

Customer : Nelsen Fulfillment Orders Service
Project : All Fields Project [Picking Rules: Pick Method-Start DPL rest in Loc Sequence Order, Skid Pick Method-None, Carton Opening-None]
Rel Batch : 2450 **Job # :** 1037

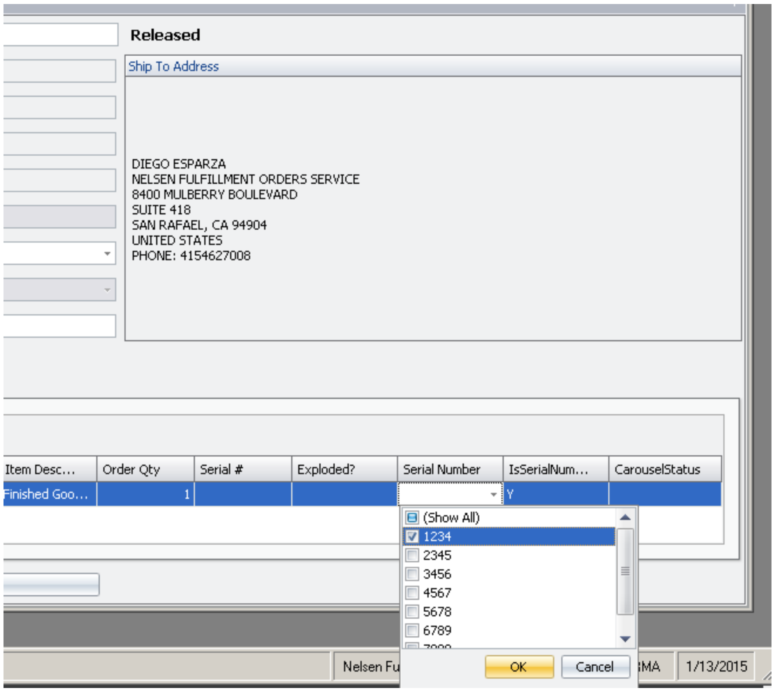
Location	Item #	Inv Code	Description	Sort Seq	Ord Weight	Skid #	Cartons	Pcs/Crtn	Loose	Avail Qty	Pull Qty	Ord Qty
1.1.1.5	19697	20141201CI-2	Finished Goods Customer Owned - 2 Dec. 2014	96	.00	3073	0	0	1	993	1	1
	1	Items			.00							1

Pick Confirmation from the UI

When the Pick Confirm is completed before shipping, the program goes to work. Enter the Pick ID, Picked By and # Packages in the screen. Click the Serial

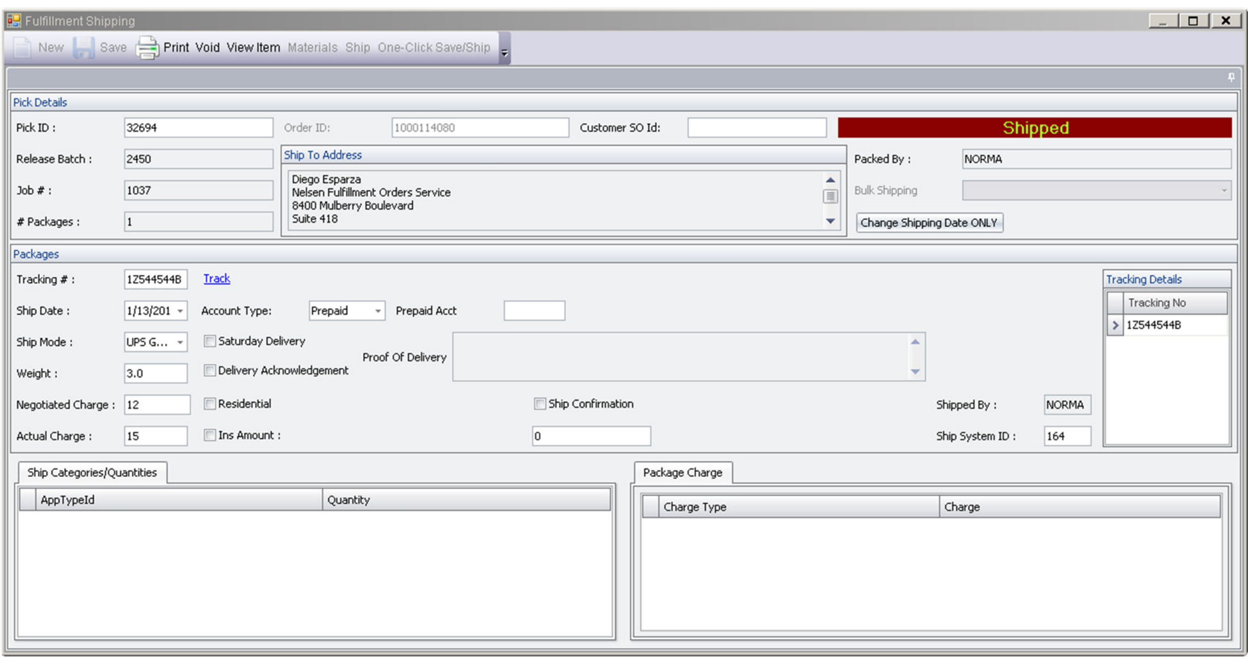


Click the Serial Number field for the package/item to get the serial numbers that were entered on the receipt.



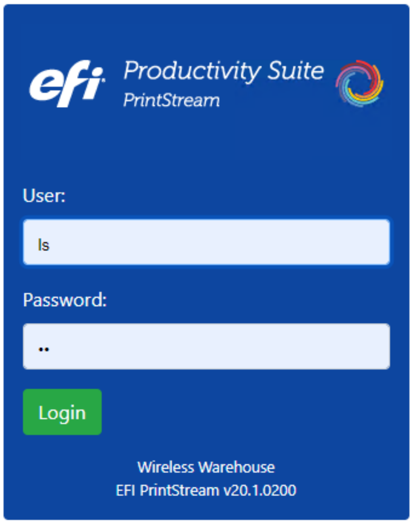
Select the serial number of the item being shipped and click **Pick**. This particular serial number is now associated specifically to this Pick ID which is shipped to the Ship to Address on the Order.

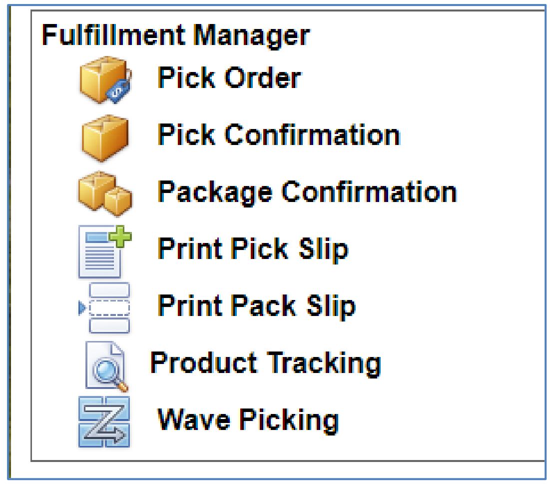
Ship the Order.



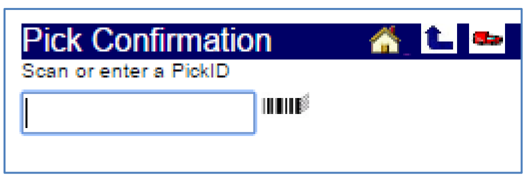
Pick Confirmation from Wireless Module

To process using the Wireless module, launch the module.



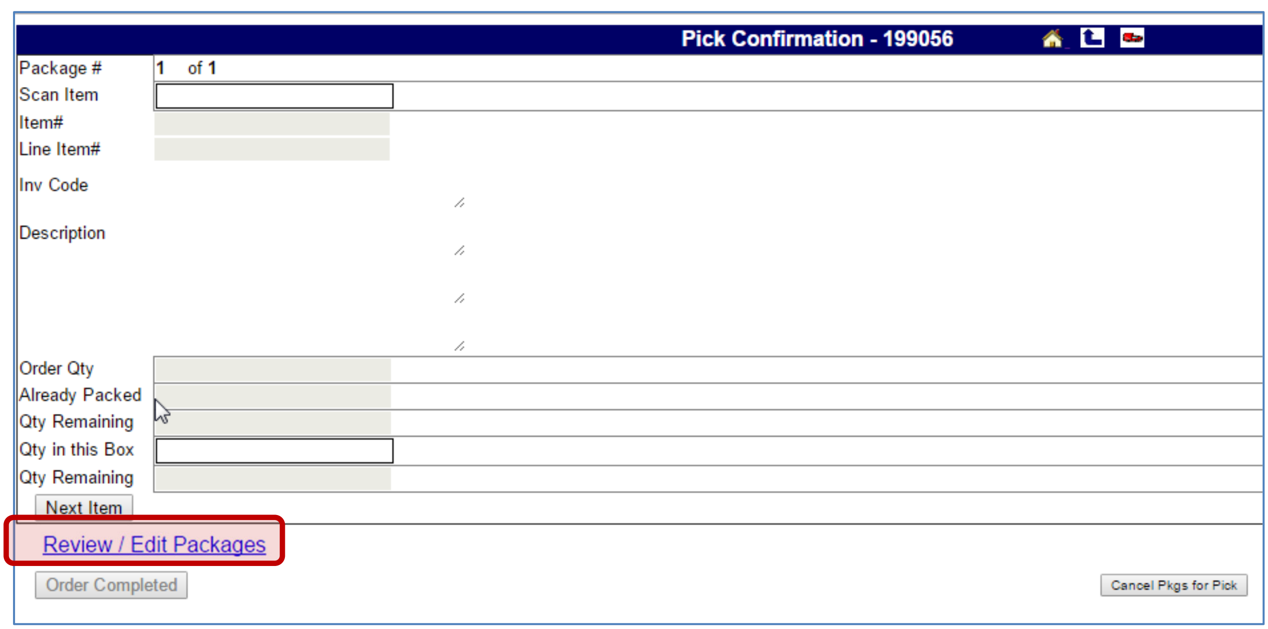


Click on Pick Confirmation.

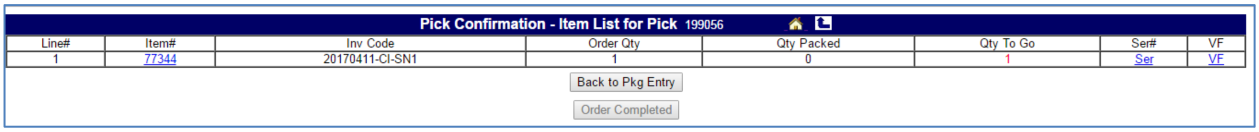


Scan or enter the Pick ID.

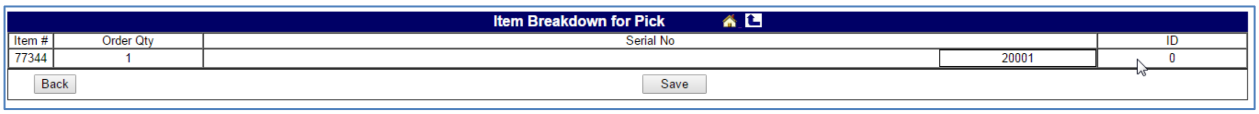
In this screen, click on Review / Edit Packages.



To the right of the screen is a field Ser#. Click on the **Ser**.



Scan the serial number barcode and click Save.



Click Save. Then click Back to Pkg Entry.

Enter of Scan the Item. Click on Next Box (or Next Item if there is more to place in this box). When all items are packed, click Order Complete.

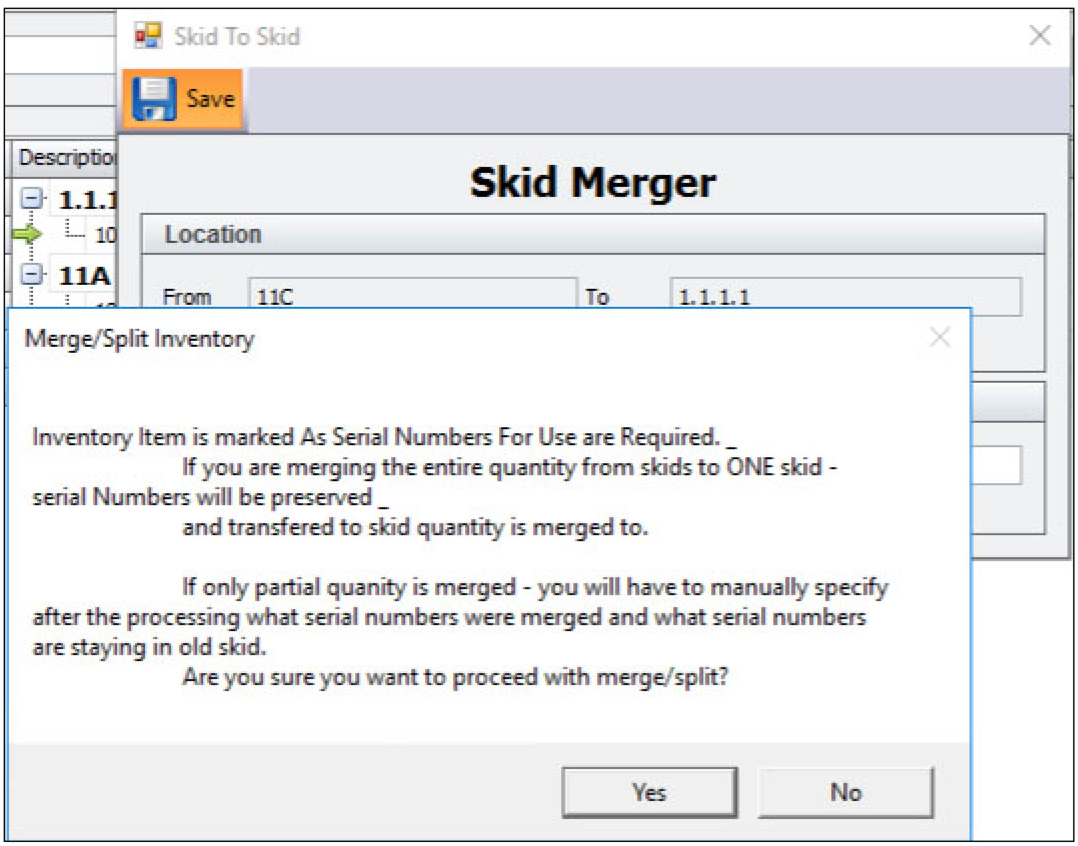
Inventory - Partial Transfer for Serial # Item

When transferring partial quantities for items that contain serial number at the skid level, we have added the functionality to allow the user to indicate which serial numbers are assigned to the new skid/ merged skid and which serial numbers are remaining with the original skid depending on the scenario being done.

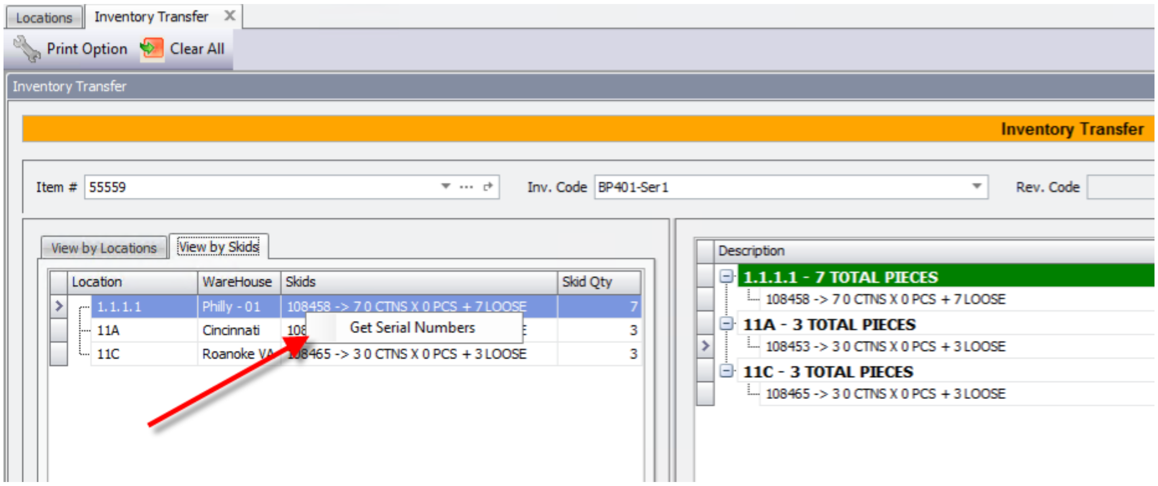
The following rules will be adhered to:

- If a skid is being split into multiple skids, the original skid and the new skid will need the serial numbers assigned properly to each of the skids
- If a skid is being transferred as a whole to a new location, the serial numbers remain and do not need to be reassigned.
- If a whole skid is being merged into another skid, the serial numbers assigned to both skids will transfer over to the newly combined skid.
- If skid is being merged into an existing skid as a partial merge, the original skid being used as the main skid will keep its assigned serial numbers. The new pieces transferred into the main skid will need to have their serial numbers reassigned and the other skid that has pieces remaining will also need the serial numbers reassigned.

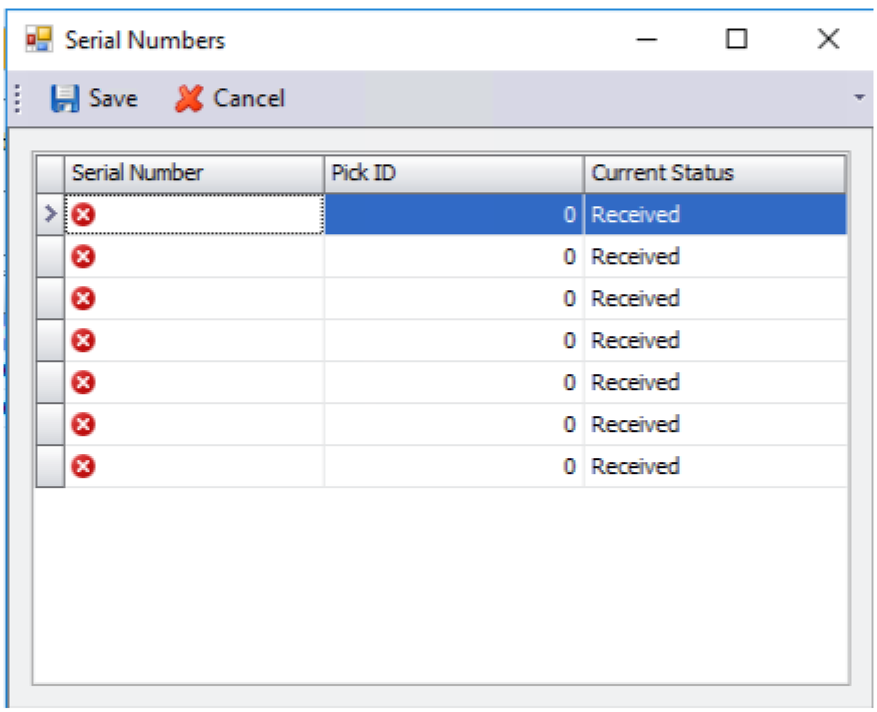
For all scenarios, the following message will appear during the transfer.



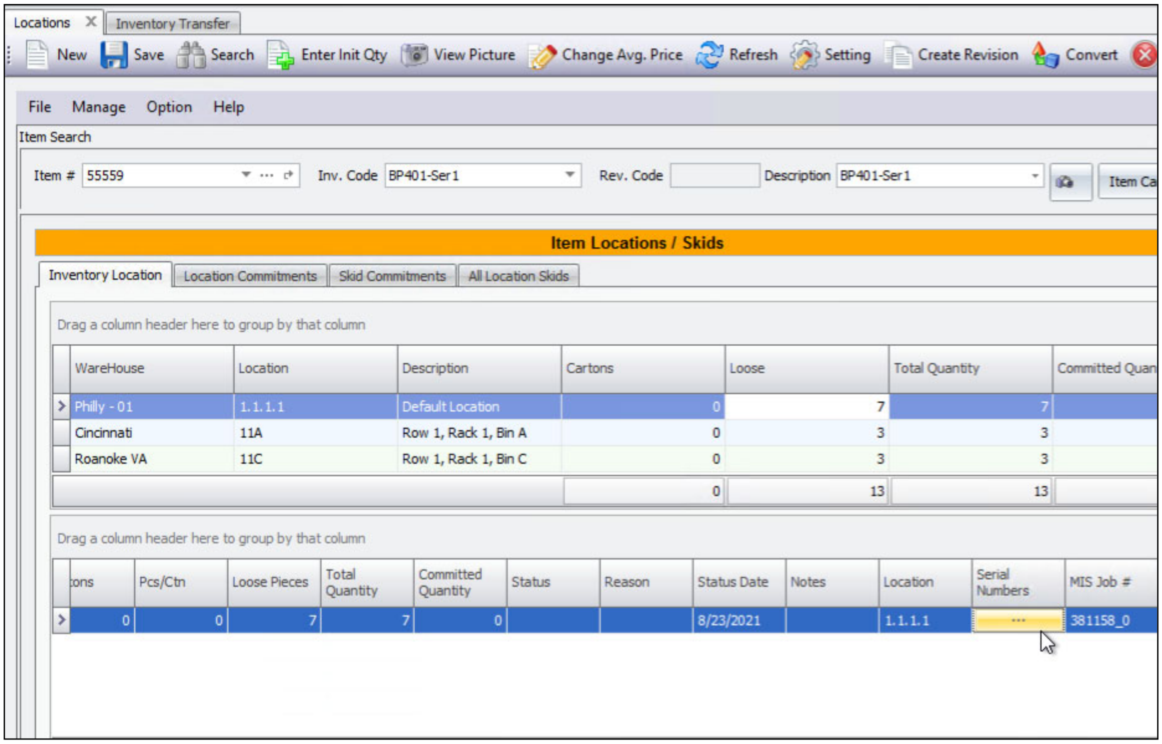
There are 2 ways provided to reassign manually the serial number, the 1st is within the "**Inventory Transfer**" screen. Go to the "**View by Skids**" tab. Select a skid line and do a right click function. The system will show the "Get Serial Numbers" option. Click on the option.



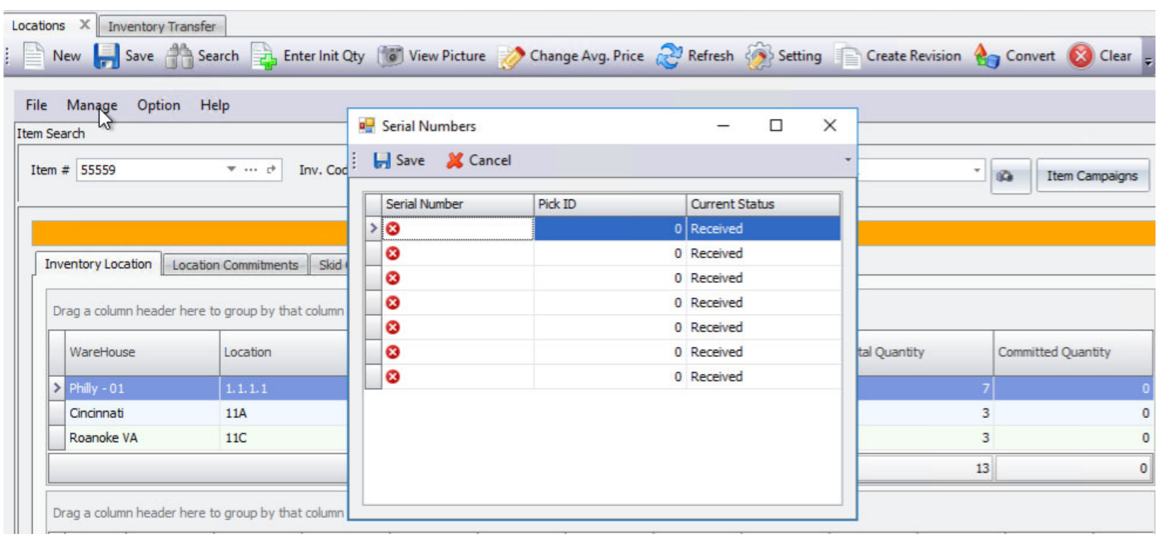
The "**Serial Numbers**" window will open.



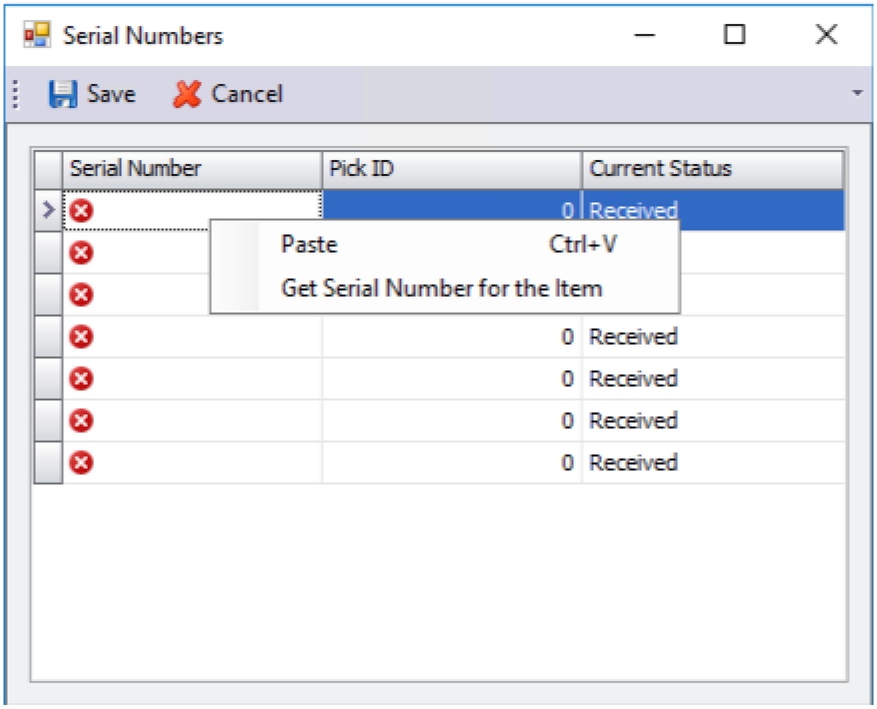
The 2nd way is within item locations. For the item, select the affected skid from the transfer and go to the skid section. Click on the line's ellipsis (…) button.



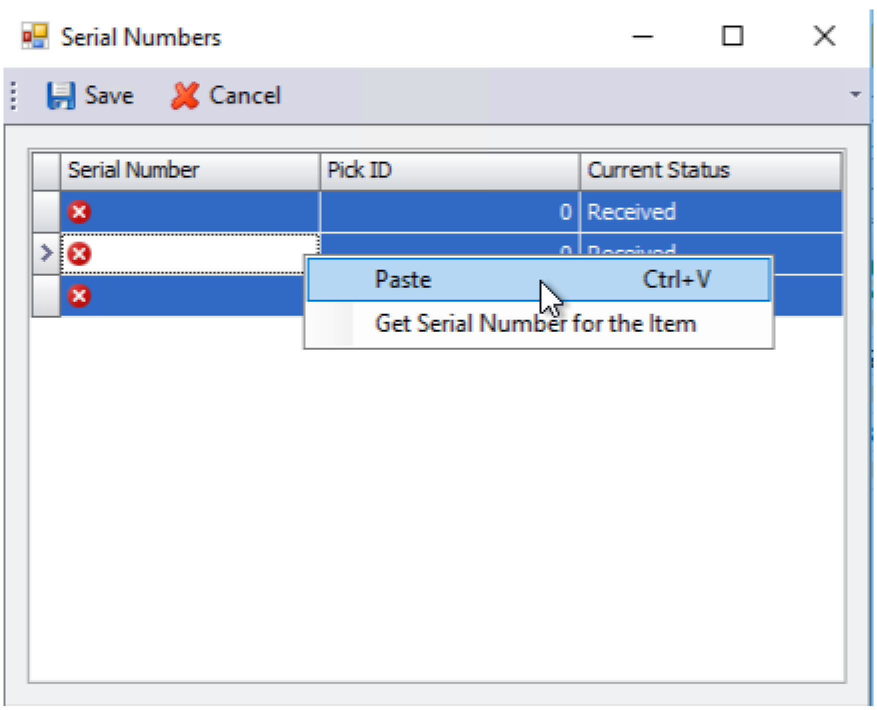
The "**Serial Numbers**" window will open as it did for the 1st option.

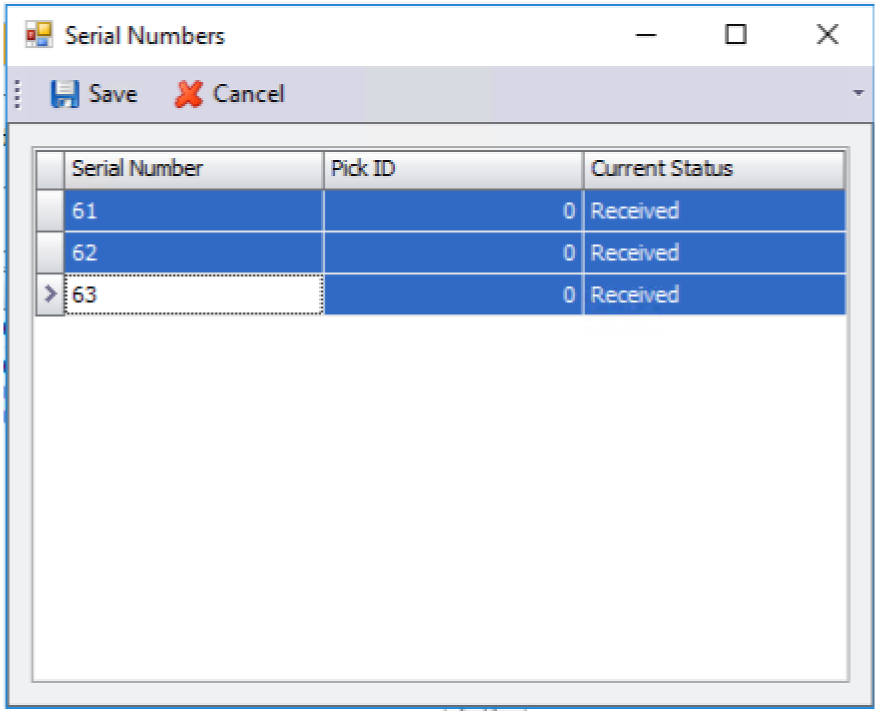


For either option, right click and the options of “**Paste**” and “**Get Serial Number for the Item**” will appear.

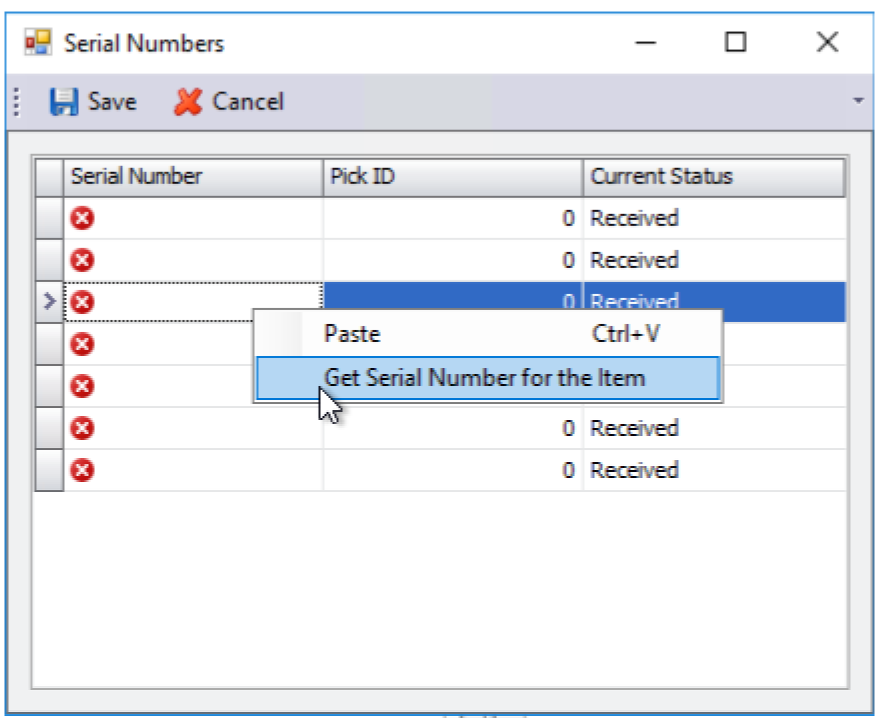


For the paste option, you copy a series of numbers from a spread sheet to the provided grid in the window. The user will highlight all lines that will have serial numbers using the options of the “**Shift**” key and highlighting a list of rows or using the “**Ctrl**” key to pick and choice the rows. Once the rows are selected, assign the serial numbers to rows via the past option and either click the option of “**Paste**” or do a “**Ctrl+V**”.

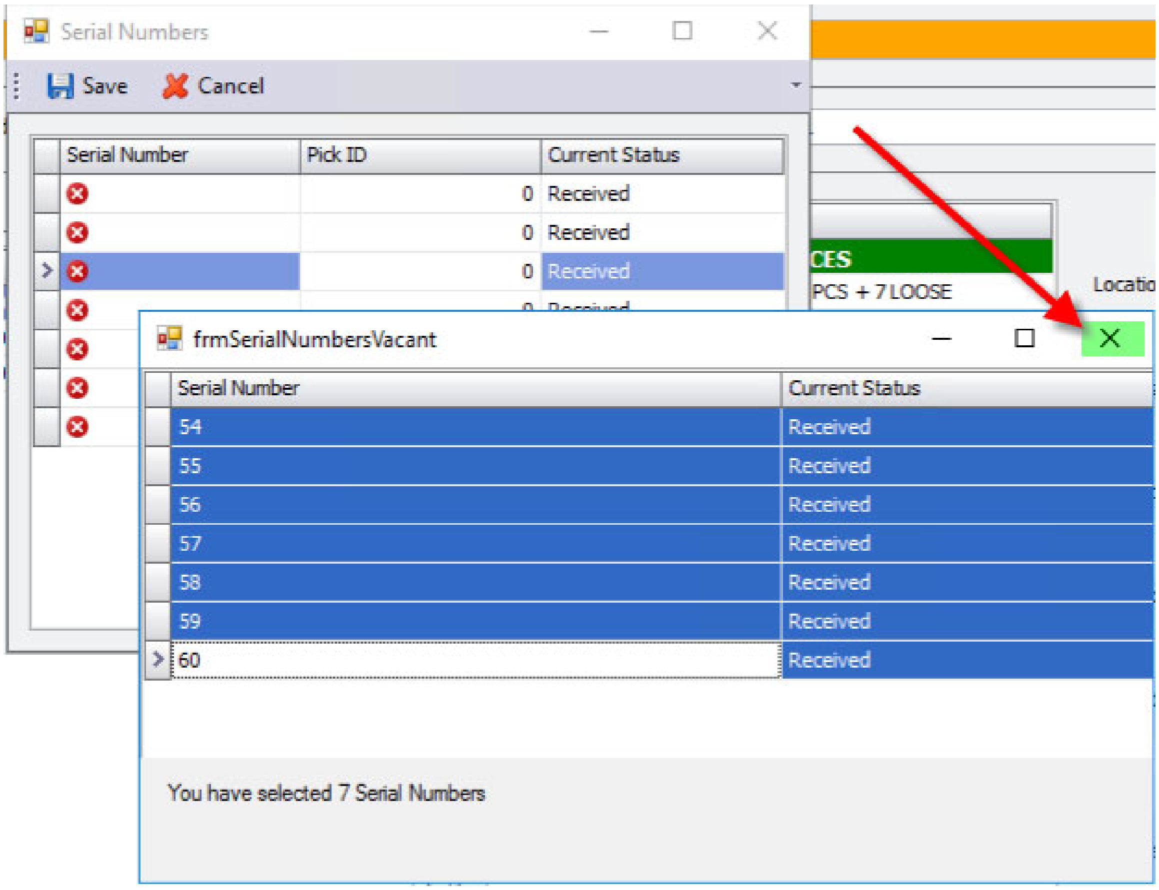




For the “**Get Serial Number for the Item**” option, click on it and it will open the “**SerialNumberVacant**” window. This will show the list of affected serial numbers pertaining to the skids involved with the transfer. The user can pick and choice the numbers being reassigned to the skid. For each line highlighted, those number will be added to the skid once the user click on the “**X**” in the upper right hand corner.



The user can pick and choices the numbers by highlighting all lines in a row that will have serial numbers using the options of the "**Shift**" key or using the "**Ctrl**" key to pick and choice the rows of the serial numbers if the #s are not in a numeric order that are being assigned to the skid.



Once all lines have been assigned using either option, click on the save. This will save all selected serial numbers to the skid.