

# EXCELLENCE IN COACHING

## TRACKING AND SELLING SERIALIZED ITEMS IN PALADIN POS

by Chad Klein

Technical Level:

Easy

Intermediate

Advanced





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TRACKING AND SELLING SERIALIZED ITEMS IN PALADIN POS

## Agenda



- Discuss two different methods and why a store would do one over the other
- Learn how to implement both methods
- Learn how to use these methods for future work orders



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### First Method: Note Field



- ❑ Easiest most straight forward
- ❑ When selling item, input serial number in a note. “Serial # 123 . . .”
- ❑ Scan serial number into note field if serial number is barcoded



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### Four Different Ways to Search for Receipt



1. In the Invoice/Quote Module use Adv Lookup → History → Part Number → type in Sku #
2. In the Customer Module → Credit Tab → Customer Friendly
3. In the Inventory Module → Sales Figures → Find Item, sort by any of the headers
4. In the Reports Module → Sales Analysis → What I need to know → Transaction report → Note Field search for the Serial # itself, Or for “Serial #” to bring up all serialized sales.



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## Work Order



- In Invoice Quote add customer
- Add “Labor Charge”
- Add Note “work order for serial #”
- Store as Quote
- Input customer name and add memo “work order for serial #”  
Store Quote



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### Second Method: Alternate Part Number



- ❑ When receiving serialized product bring up the item in Inventory Module and using Alt. Part # (F6) add all new serial numbers as Alt. Part #'s
- ❑ When selling the item the cashier must bring up item using the serial # then remove # from Alt. Part #



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End

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[paladinpointofsale.com/webinars](https://paladinpointofsale.com/webinars)

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