

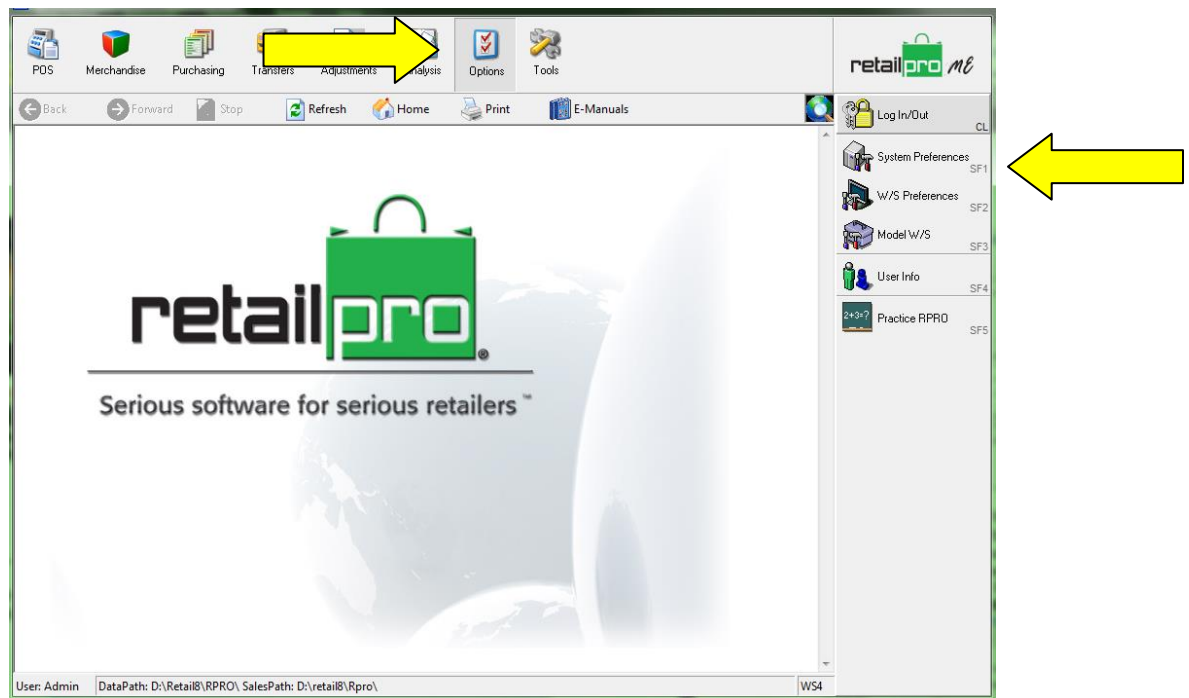


## How to Track Serial Numbers March, 2016 RP8

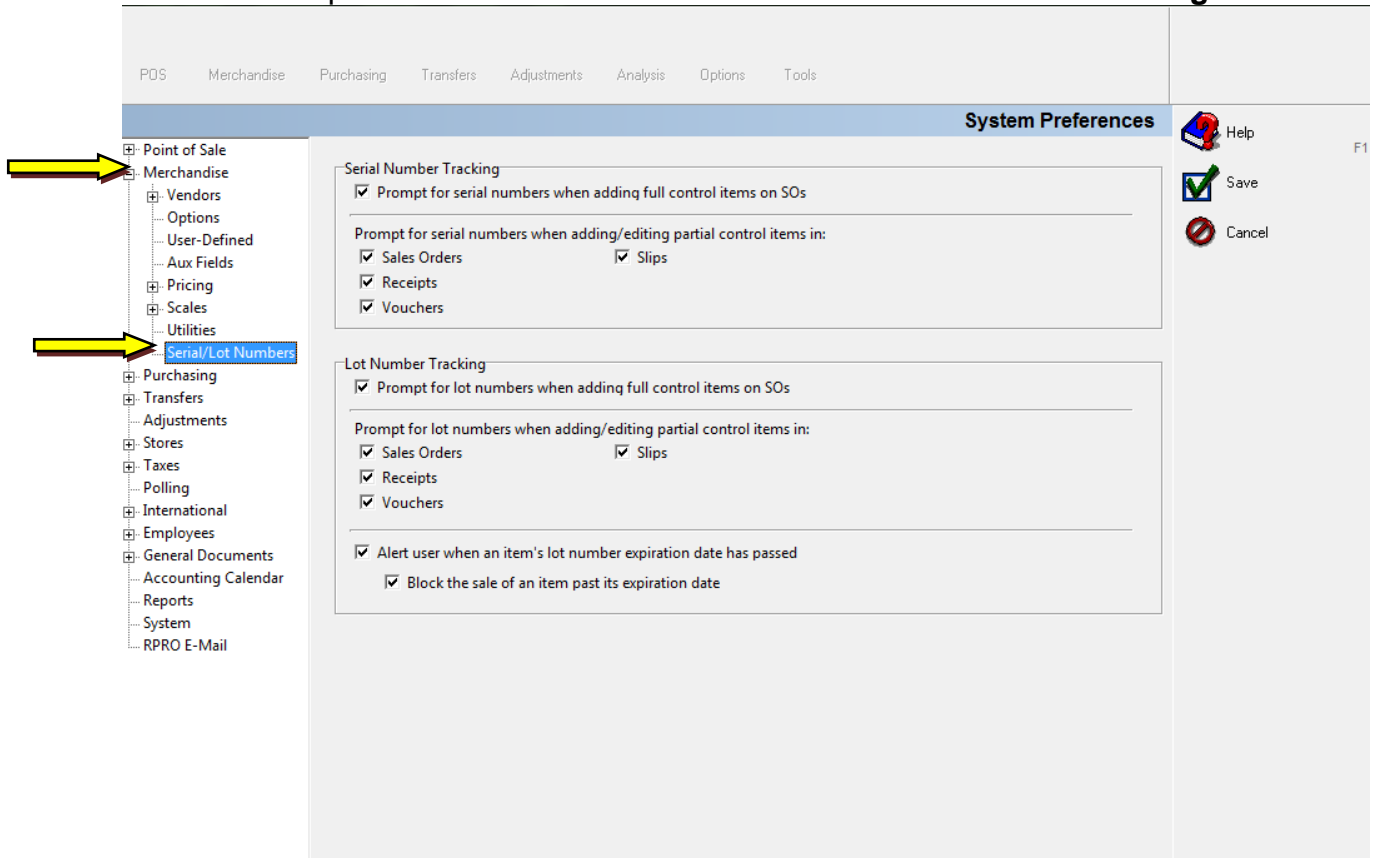
<https://www.youtube.com/watch?v=NBQDIzzfuU0>

In Retail Pro v8 you can assign a Partial or Full serial number to the item. This document will go over the steps on setup and implementation.

1. We will start by selecting **Options**, then select **System Preferences** on the Side Menu.



## 2. Next we expand **Merchandise** and click on **Serial/Lot Number Tracking**.

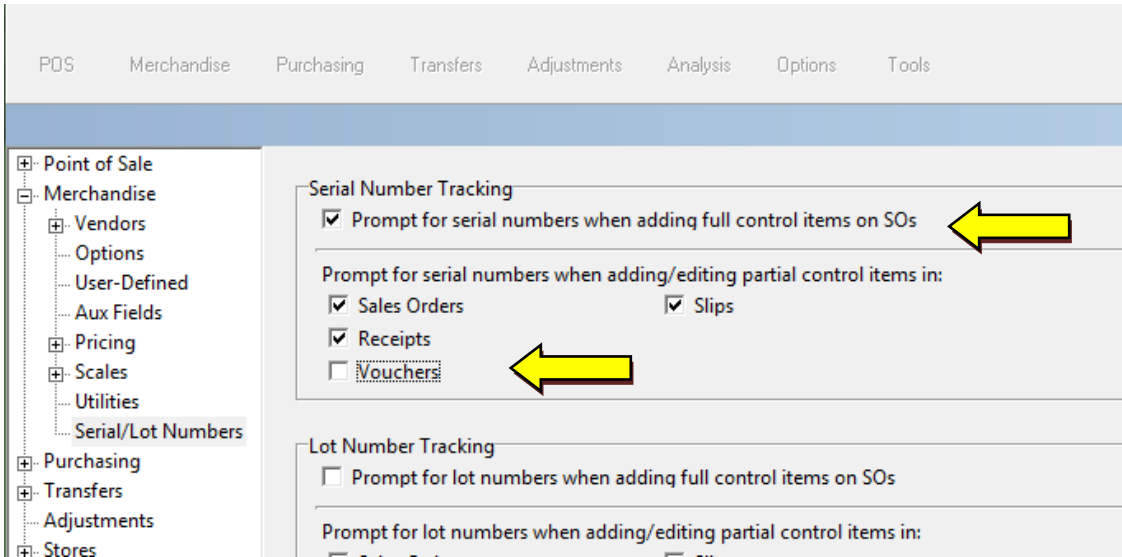


There are two ways to track serial numbers in Retail Pro, Partial and Full tracking.

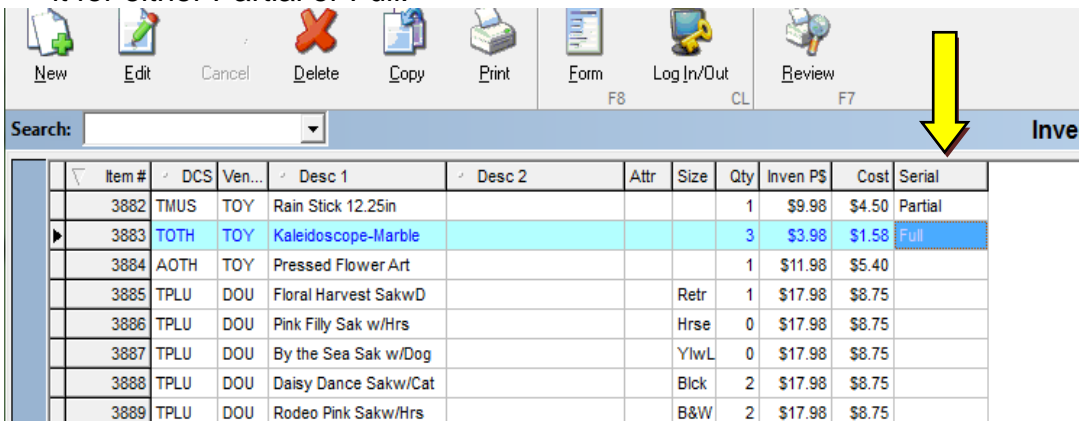
Full Serial items always require a serial number, Partial items only require on specified documents.

3. The first option we have here is “**Prompt for serial numbers when adding full control items on an SO.**” This will require a serial number to be entered if a Full Control serial item is placed on a Sales Order. By default, serial number items do not require a serial number on an SO.

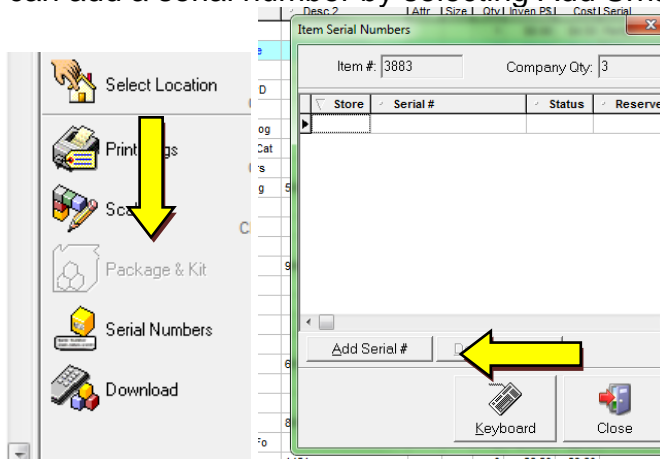
The documents for Partial Serial items are listed below. The documents unchecked will not **Require** a serial to be entered for the item



4. Then we want to go add the Serial type to the items in **Inventory**. You can set it for either Partial or Full.



5. Next, go to Serial Numbers on the side menu to Add a Serial number from the item. You can add a serial number by selecting Add Serial #



6. When creating the document, a Full serial number item requires a serial number when the item is added to the document. Partial serial number items only require a serial number if the document type is selected in System Preferences as shown above.
  - a. If an item is not required to have a serial number when the document is made you can add it if needed.

Here is an example of the Serial Number Entry screen that prompts the user when a Serial item is added.

