

Purchase Orders and Serialized Inventory Items

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Serialized inventory items acquire serial number information from the Purchase Order program.

Create Serialized Inventory PO

1. Select **Purchase Orders** on the *EnergyService* menu.
2. Choose **Purchase Orders** then press **Ctrl+C** or click **Create** to create a new purchase order.
3. Select the *Vendor#* and shipping *Warehouse#* receiving the serialized item.
4. Press **F5** in the *Item* field and select the serialized inventory items for purchase.

The screenshot shows the 'Purchase Order' screen. In the top left, there is a 'Vendor Name / Address' section with fields for Vendor# (3), GAS EQUIPMENT CO, 123 KANSAS AVENUE, KANSAS CITY, KS 65989, Status (1), and Notes. In the top right, there is a 'Ship To Warehouse' section with fields for Warehouse# (1), AVON, 5250 US HWY 36, SUITE 100, and AVON, IN 46123. Below these sections is a 'Select Inventory Item' dialog box. The dialog has a grid of items with columns: Category, ALL, Item/Dept, Start with, Search for, Search, and Clear. The grid lists various items such as 1143434CTCDS, 1143434CTCPH, 1143424HDR, 1146WIREHGR, 114BLK45, 114BLACOUP, AMANASTO, 114BLKST90, 114CBVCPH, 114CPLGCPH, 114CFADCPH, 08-1178, 08-2403, 08-5403, 08-5406, and 08-5407. Below the grid is a 'Selected Items' table with columns: Division, Warehouse Name, Location/Storage, Item, Description, Category, and Cost.

5. Choose **Save Selections** when all items have been chosen.
6. When a serialized item has been selected, the *Ordered* quantity will default to 1.00 and cannot be modified.

Each serialized item must have a separate line for each serial number received.

Tip: Select the serialized item and press the **Down Arrow** on the keyboard. Press **Ctrl+D** while in the *Item* field and it will copy (known as Ditto) the item number listed directly above it.

The screenshot shows the 'Purchase Order' screen with a list of selected items in the main grid. The columns are: Item, Description, Ordered, Received, Price, Disc, Tax%, Tax, Expected Dt, Last Recv Dt, and Line Amount. The items listed are 1143434CTCDS and 1143434CTCPH, both with a quantity of 1.00, price of \$6.25 and \$7.86 respectively, and a line amount of \$6.25 and \$7.86.

Item	Description	Ordered	Received	Price	Disc	Tax%	Tax	Expected Dt	Last Recv Dt	Line Amount
1143434CTCDS	11/4 C 3/4" C X 3/4" C TEE"	1.00	0.00	\$6.25	0.00%	0.00	0.00	00/00/00	00/00/00	\$6.25
1143434CTCPH	11/4 C X 3/4" C X 3/4" C TEE	1.00	0.00	\$7.86	0.00%	0.00	0.00	00/00/00	00/00/00	\$7.86

7. As serialized items are selected, a *Serial #* field appears at the bottom of the PO. Serial numbers will be entered when the Purchase Order has been received.
8. Select **Save & Close** when all items have been listed.

Receive PO and Update Serial Numbers

1. Access the Purchase Order located in the *Purchase Order* menu.
2. Select **Modify** or press **Ctrl+M**.
3. For serialized items, the line item MUST be selected and 1.0 entered in the *Received* field.
4. A screen will appear asking for the serial number to be associated with the inventory item.

Received	Received	Price	Disc	Tax%	Tax	Expected Dt	Last Recv Dt	L
1.00	1.00	\$6.25	0.00%	0.00	0.00	00/00/00	02/02/26	
1.00	0.00							
1.00	1.00							

Serial#

Continue

Ref Proposal#  Proposal Customer

5. Enter the serial number and press **Enter** or choose **Continue**. The serial number is now associated with the item received.
6. Repeat Steps 3 - 5 for each serialized item. Select **Save & Close** when finished.
7. Choose **OK** to finalize the Purchase Order if all items have been received. A message will not display if 0.00 *Received* quantities remain.
8. Once items are received, they are considered as an in stock item for inventory.