

Serialized Inventory Invoices

Last Modified on 02/02/2026 5:02 pm EST

When a serialized inventory item is sold, the salesperson will be required to select the serial number prior to posting the invoice.

Note: If a serialized inventory item is selected when creating an invoice but not posted, the *Status* of the Inventory Item changes from *In* to *Sold*. This prevents others from selecting the item for sale. Once posted, the inventory item *Status* changes to *Out* and is no longer available in the system.

1. Navigate to *Customer Menu / Customer Maintenance* and select customer to be invoiced.
2. Choose **Invoices**. Select **Create** and enter the *Service Location #*, *Service Order Type*, and *Sales Rep* (optional).
3. Enter the *Item* number. If the item number is unknown, press **F5** to select from a list.
4. When a serialized item is selected, a *Serial#* field will appear on the *Invoice* screen. The quantity will automatically default to 1.0 and cannot be modified.
5. Select the *Serial# Search* button. A *Select Serial#* screen will appear.

The screenshot shows two overlapping windows. The 'Select Serial#' window is in the foreground, displaying a list of serial numbers. The first item, '345678', is highlighted and marked with a red circle 6. Below the list are 'Select' and 'Cancel' buttons, with the 'Select' button marked with a red circle 7. The background window is the 'Invoice' screen. It has fields for 'Service Name / Address', 'Service Location# / 2', 'MICHAEL BROCK', '123 ANYWHERE ST', 'ANYWHERE, IN 46123', 'Sales Rep 2', and 'JOHN SMITH'. Below these is a table with columns 'Item' and 'Description'. The first row is '00-5422' with description '500 GAL SKID TANK LIGHT DUTY'. The second row is 'LABOR' with description 'LABOR'. The third row is '114CBVCPH' with description '1 1/4 BALL VALVE C X C N/FULL PORT', marked with a red circle 3. At the bottom of the Invoice screen, there is a 'Serial#' field (marked with a red circle 4) and a search button (marked with a red circle 5). A 'Remove Line' button is also visible.

6. Select the *Serial#*.
7. Choose **Select**. The *Select Serial#* window will close, returning to the *Invoice* screen. The serial number associated to the inventory item will now display.

The screenshot shows the 'Invoice' screen after the 'Select Serial#' window has been closed. The 'Serial#' field at the bottom is now populated with the value '345678' and is highlighted with a red box. The table above it remains the same, with the third row '114CBVCPH' and description '1 1/4 BALL VALVE C X C N/FULL PORT'.

Note: The serialized item selected will change from being considered *In* inventory to *Sold*. This serial number will no longer appear in the *Select Serial#* list. Once the Invoice is posted, the inventory *Status* will change to

8. Continue to add Inventory Items as necessary. Review the Invoice for accuracy and select **Post**.
9. Choose the number of invoices to print. The customer will be billed for the Inventory Item(s) and inventory quantities will be reduced. The printed Invoice will display the serial number sold.

ABC PROPANE COMPANY
 5250 US HWY 36
 SUITE 100
 AVON, IN 46123
 Phone (317)745-6560 FAX (317)250-1234

Invoice

Date	Invoice #
02/02/2026	535

Name / Address	Service Address
Customer# 100005 MICHAEL BROCK 123 ANYWHERE ST PENSACOLA, FL 32501	Location# 2 MICHAEL BROCK 123 ANYWHERE ST ANYWHERE, IN 46123

Item	Description	Qty	Amount	Total
00-5422	500 GAL SKID TANK LIGHT DUTY	1.00	\$2,800.98	\$2,800.98
LABOR	LABOR	1.00	\$150.00	\$150.00
114CBVCPH	1 1/4 BALL VALVE C X C N/FULL PORT"	1.00	\$31.72	\$31.72
	Serial#: 345678			

	Subtotal	\$2,982.70
	Sales Tax	\$0.00
	Total	\$2,982.70