

Understanding Inventory Tracking with Serial Numbers

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To increase accountability and traceability for inventoried line items, you can track them with serial numbers. Serialized items have a unique ID for each unit and are tracked individually. This is often helpful for expensive products or items that are unique, in spite of being the same model as other items (e.g. computers). They often come with their own warranty or maintenance constraints, sometimes linked to the date of purchase. Serialized tracking also helps you easily [review all inventory transactions](#)

[for each item.](https://aace5.knowledgeowl.com/help/tracking-inventory-transactions-for-lot-tracked-and-serialized-items)

Because serial numbers may be quite long, using [barcodes and scanning software](#) [can be helpful](http://aace5.knowledgeowl.com/help/considerations-and-peripherals-for-mobile-apps). These tools both speed up the data entry and help prevent error from typos (e.g. transposing numbers or mistaking letters, such as "1l1" being entered as "111").

Setting Serial Tracking


This setting must be put into place *before* you begin using the line item code (e.g. when you first create the [line item code](#) [record](http://aace5.knowledgeowl.com/help/overview-of-line-item-code-screens)). The Serialized tracking flag *cannot* be marked after other records are linked to the line item code (e.g. sales orders, GJ/GL entries, inventory transactions, etc).

On the detail view for a new inventoried item or inventoried assembly item, in the Inventory section, mark the flag **Serialized**.

In addition, the Next Serial field can help streamline things when you are sure your serialized inventory will have a continuing sequence of serial numbers. You can enter the next-expected serial number in this field. When you receive shipments that include this line item, aACE will auto-populate this serial number for the first item, then auto-generate additional serial numbers for any remaining items. The Next Serial field will then be updated to show the next number for expected use. (Note: Serial numbers with less than 5-digits will have leading zeroes appended.)

Receiving Serialized Inventory

When you receive a shipment that includes items marked for Serialized tracking, the


Shipping Log module's Packing List section displays the serial tracking Ref #s icon () for each serialized item. To receive the shipment, the system requires you to enter serial numbers. Click the Ref #s icon to display the Serials popup.

You can enter serial numbers in several ways:


- Type in individual numbers separated by commas, semicolons, or carriage returns (Note: aACE converts carriage returns to a comma-separated list.)
- Type in a span of numbers (e.g. 1000-1234)
- Copy-paste a list of numbers (e.g. from a spreadsheet)
- Scan individual numbers with a barcode scanner

After you save the serial numbers, the Ref #s icon is highlighted and you can finish receiving the shipment.

Tracking Inventory Lots

For serialized products, the Inventory Lots module also shows the Serialized flag marked. The list view displays the reference numbers, so you can search the lots by serial number. The details view provides more info. Serial numbers are listed in the Reference #s field and the Ref #s icon is highlighted (). You can click that icon to display a popup with details about which serial numbers have been allocated to orders and which are remaining.

Shipping Serialized Inventory

When shipping serialized products for an order, the Shipping Log's Packing List section displays the Ref #s icon (). You can make various edits to the shipment and save the changes; however, aACE will *not* allow you to mark the shipment as shipped until you click the Ref #s icon to display the Serials Selector dialog, then specify a serial number for each serialized item.

Handling Returns for Serialized Inventory

Beyond the regular steps for making inventory adjustments for returned product, [adjustments for serialized items](http://aace5.knowledgeowl.com/help/handling-returns-and-inventory-adjustments-for-lot-tracked-and-serialized-items) (<http://aace5.knowledgeowl.com/help/handling-returns-and-inventory-adjustments-for-lot-tracked-and-serialized-items>) require additional details.

