



Serial Number Tracking Prism POS

<https://youtu.be/Zq7rcOnlSPY>

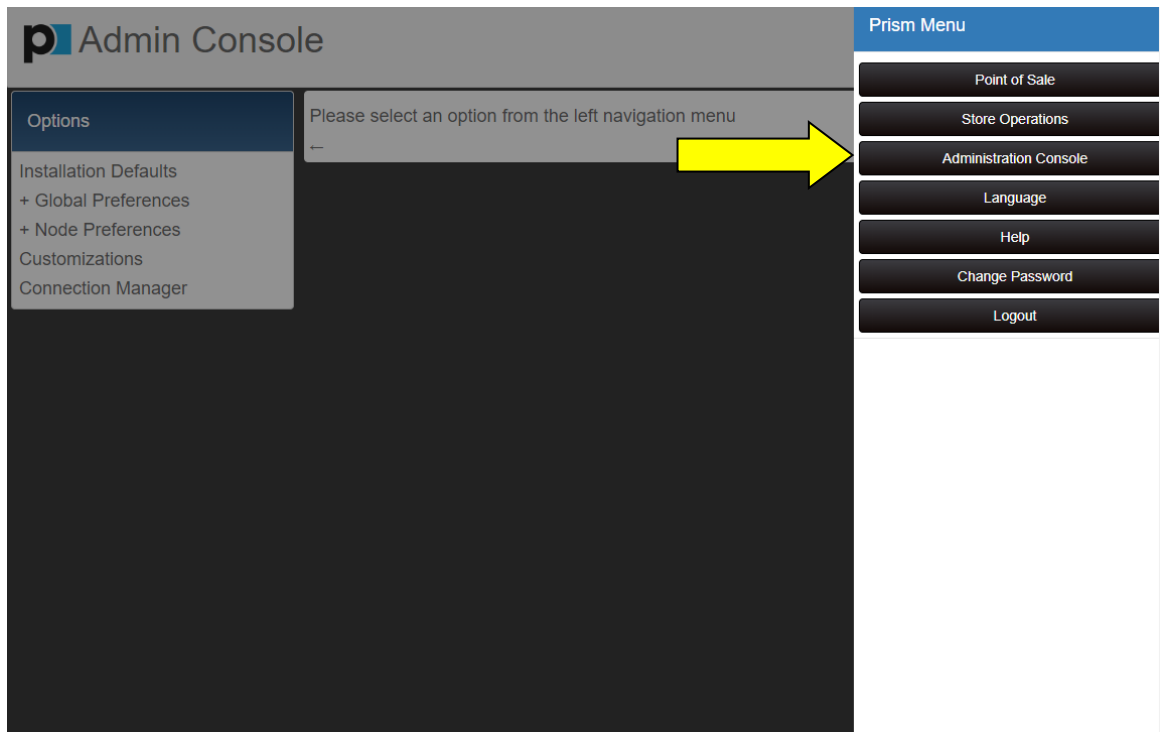
In Prism you can assign a Partial or Full serial number to item. This document will go over the steps on setup and implementation. First, here is an explanation of the difference between Partial and Full tracking:

Full Control - Entry of Number Required: When a full control item is entered on a document, entry of a serial or lot number is required. For example, if you list a serial number item with a quantity of "3" then the user must enter three unique serial numbers, one for each unit.

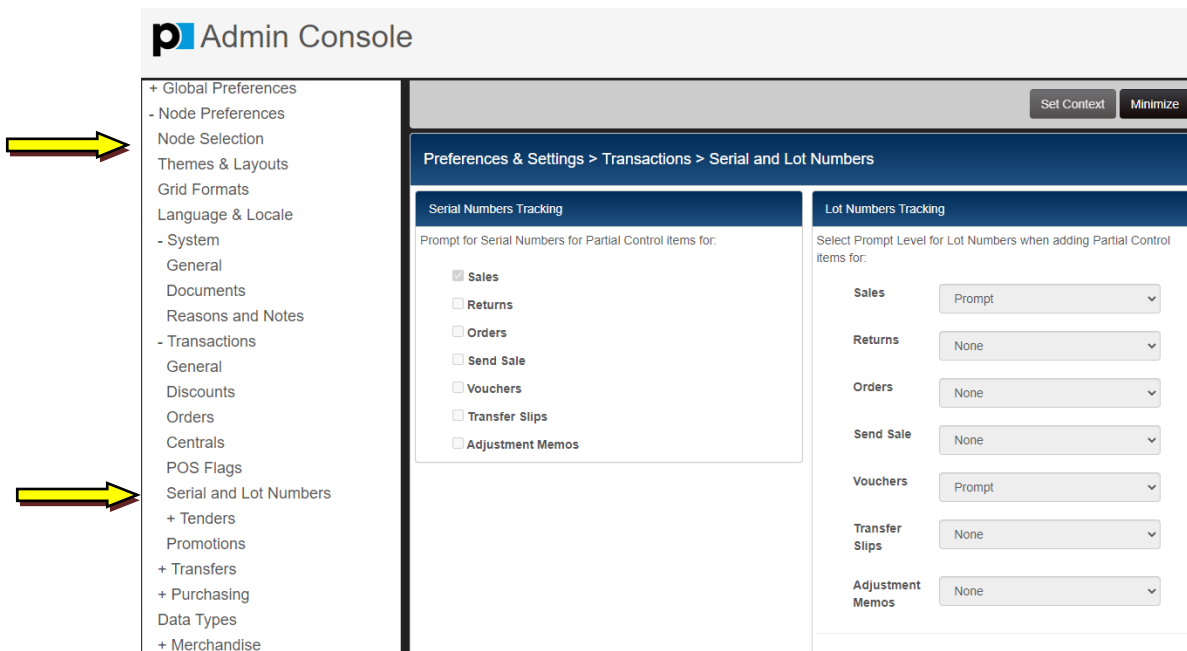
Partial Control - Entry of Number Optional: When it comes to partial control items on documents, entry of a number is optional. For partial control, you can select the specific document types where a prompt will be displayed when a serial/lot number item is listed (the prompt is always displayed for full-control items).

1. We will start by selecting **Prism Menu**, then select **Admin Console** on the Side Menu.





2. Next, we set our Node to the Store level, then **Transactions** and click on **Serial and Lot Numbers**.



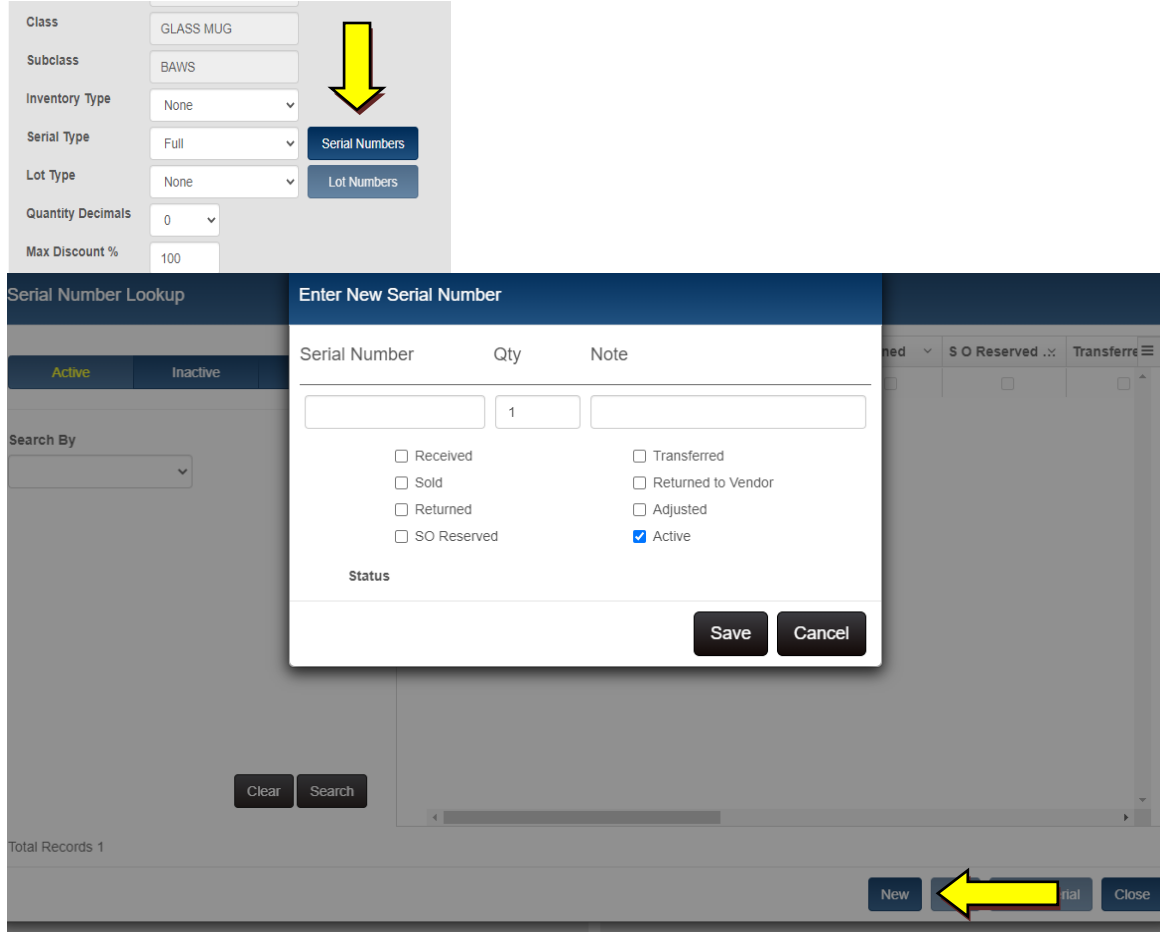
- This is where we will be setting up the documents that require a serial number if Partial tracking is chosen on an item. Simply check off the document you wish to require a Serial Number.

The screenshot shows the 'Admin Console' interface. On the left is a navigation menu with categories like 'Global Preferences', 'System', 'Transactions', and 'Serial and Lot Numbers'. The main content area is titled 'Preferences & Settings > Transactions > Serial and Lot Numbers'. It is divided into two panels: 'Serial Numbers Tracking' and 'Lot Numbers Tracking'. A yellow arrow points to the 'Serial Numbers Tracking' panel, which contains a list of document types with checkboxes: Sales (checked), Returns, Orders, Send Sale, Vouchers, Transfer Slips, and Adjustment Memos. The 'Lot Numbers Tracking' panel contains dropdown menus for the same document types, with 'Sales' set to 'Prompt' and others to 'None'.

- Then we want to go add the Serial type to the items in **Store Operations and then Inventory**. You can set it for either Partial or Full.

The screenshot shows the 'Inventory' item details page. At the top, there are filters for 'Subsidiary' (001), 'Store' (Event Sales), 'Price Level' (retail), and 'Season' (None). The page is split into 'Item Details' and 'General Information' sections. In the 'General Information' section, a yellow arrow points to the 'Serial Type' dropdown menu, which is currently set to 'Full'. There are also buttons for 'Serial Numbers' and 'Lot Numbers' next to the dropdowns. The 'Item Details' section contains various fields like DCS Code, Vendor Code, Description, Attribute, Size, Cost, Price, UPC, and ALU.

5. Next, go to Serial Numbers next to the Serial Type and Add or Delete a Serial number from the item. You can add a serial number by selecting New. You can then enter the Serial Number and Choose what action should be taken on it. If it has been received, sold, etc.



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.

Voucher #0

Voucher Type: Regular

Reference P...

Serial Number Required

UPC ██████████
*FLASK LLR LEATHER

Item Lookup

Ok

Upc	Dcs Code	Vendor Code	Description1	Description2	Itemsize	Attribute	Qty
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