

Import Lot & Serial Numbers Onto Receiver Line Items

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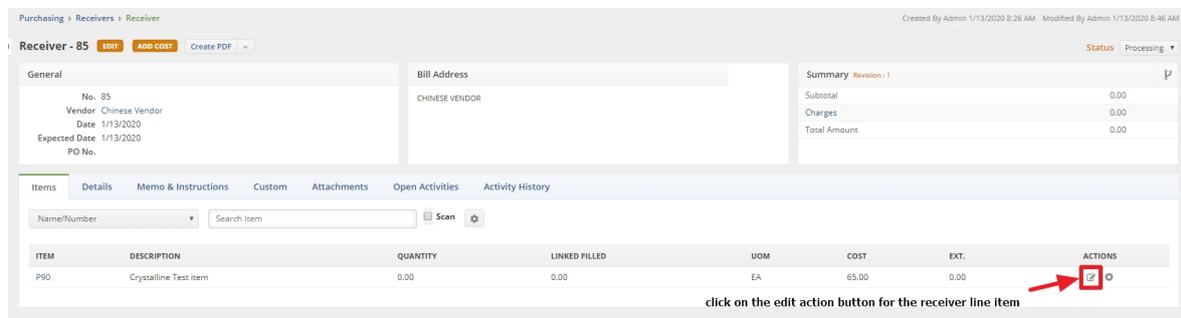
Quickly populate your receiver line items using this method

You can import Serial & Lot numbers inside the receiver using the button —

IMPORT CSV

Note: This is not a line item import, this is an import of Bin / Serial / Lot # into EXISTING line items.

In order to add/delete columns you want to populate you first need to edit the receiver line item and add all the columns you want to populate from the import screen —



Purchasing > Receivers > Receiver

Receiver - 85 **EDIT** **ADD COST** Create PDF

Status: Processing

General: No. 85, Vendor: Chinese Vendor, Date: 1/13/2020, Expected Date: 1/13/2020, PO No.

Bill Address: CHINESE VENDOR

Summary Revision: 1

ITEM	DESCRIPTION	QUANTITY	LINKED FILLED	UOM	COST	EXT.	ACTIONS
P90	Crystalline Test Item	0.00	0.00	EA	65.00	0.00	EDIT

click on the edit action button for the receiver line item

Next you select the Lot / Serial tab —



Purchasing > Receivers > Receiver Line

Line item for Receiver 85 **Save** **Reset**

Item: P90 Line No.: 1

select the Lot / Serial #s tab

General Custom **Lot / Serial #s**

Description: Crystalline Test Item

Quantity: 0.00

Cost: 65.00

UOM: EA

Part No:

Class:

Line Instructions:

Next click the green "Save" button on the upper right of the next screen

Next click twice on the quantity column —

Receiver - 85

General: No. 85, Vendor: Chinese Vendor, Date: 1/13/2020, Expected Date: 1/13/2020, PO No.

Bill Address: CHINESE VENDOR

Summary: Subtotal 0.00, Charges 0.00, Total Amount 0.00

ITEM	DESCRIPTION	QUANTITY	LINKED FILLED	UOM	COST	EXT.	ACTIONS
P90	Crystalline Test item	0.00	0.00	EA	65.00	0.00	🔍 🗑️

click twice to open the dialog box

Next click the orange "IMPORT CSV" button and then select the CSV file to import.

Make sure your CSV is set up correctly. The Lot / Serial Number header must be displayed as: LotOrSerialNo or the import will not pick it up

	A	B	C	D	E
1	Bin	LotOrSerialNo	Quantity		
2	Default	MC11AA00001	1		
3					

The output will look like this —

Receiver - 85

General: No. 85, Vendor: Chinese Vendor, Date: 1/13/2020, Expected Date: 1/13/2020, PO No.

Bill Address: CHINESE VENDOR

Summary: Subtotal 0.00, Charges 0.00, Total Amount 0.00

Item: P90, Description: Crystalline Test item, Location: HQ

Enter or scan Lot / Serial number

IMPORT CSV

NO.	BIN	LOT / SERIAL NUMBER	QUANTITY	DESCRIPTION	ITEM	SOURCE	ACTIONS
85	V-8	16	900.00	WIDGET 1	P90	Foreign	🔍 🗑️
85	Floor	17	1,000.00	WIDGET 1	P90	Domestic	🔍 🗑️
85	Floor	19	500.00	WIDGET 1	P90	Domestic	🔍 🗑️
85	Floor	15	800.00	WIDGET 1	P90	Domestic	🔍 🗑️
85	V-8	20	700.00	WIDGET 1	P90	Foreign	🔍 🗑️
85	V-8	18	1,100.00	WIDGET 1	P90	Foreign	🔍 🗑️

This is what you should see after you select the CSV file

NOTE: this is just an example and does not (nor does it need to) contain all the available columns.

Now click on the green "Close" button on the lower right of the dialog box and you should be back to the receiver line item showing FULL QUANTITY and LINK FILLED of the same quantity.