Webinar - Lot & Serial Number Features - Traceability

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Webinar Notes:

Lot & Serial Number Features - Traceability

- **Setting an Item for Serialization**
  - **On a New Item you check Track Lot or Serial Numbers in the General Tab**
- **Opening the Serial and Lot Number List**
  - **Go to the Open Full List drop-down and click Lot or Serial Numbers, this opens that special list**
- **Admin Section > Company Preferences > Lot / Serial #s**
  - **To get to the preferences for changing the Serial Number Incrementation**
  - **Edit Duplicates**
  - **Edit the Getting Available**
    - **This is the number it should increase by and what that is based on.**
- **Admin Section > Company Preferences > Shipping**
  - **Uncheck the first checkbox for quantities if you DON'T want the system to pick the lot or serial number of the item that will be**

Shipping out.
- **Company Preferences - Lot Numbers & Serial Numbers**
  - **https://help.ordertime.com/help/company-preference-lotserial-s**
- **Video - Lot & Serial Number Tracking Demo**
  - **https://help.ordertime.com/help/lot-serial-number-tracking-demo**
- **Import Lot & Serial Numbers Onto Receiver Line Items**
  - **https://help.ordertime.com/help/import-receiver-line-items-from-a-csv**
- **For a Custom Report on Valuation with Serial Numbers**
  - **Choose Ledger Type Report**
  - **Choose these Tables**
    - **Docs**
    - **Bin and Lot or Serial Nos**
    - **Items**
    - **Bin**
  - **Choose these Columns**
    - **Name/Number**
    - **Lot / Serial**
    - **Date**
    - **No.**
    - **Tran Type**
    - **Bin**
    - **Movement Quantity**
    - **Total Movement Quantity**
    - **Value Amount**
    - **Total Value Amount**
  - **(We can help you out with this, just contact us)**

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As always, direct support-related queries to: support@ordertime.com