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Serialised Stock

Introduction

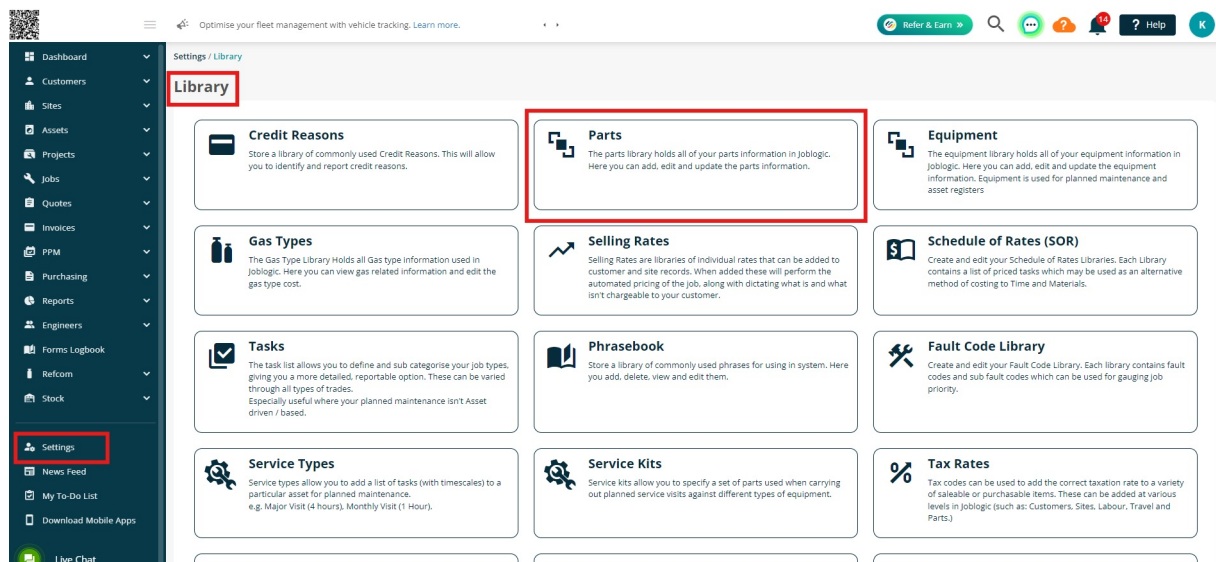
The Serialised Stock App makes managing inventory simple by letting you easily track and manage individual parts with unique serial numbers. This not only boosts inventory accuracy and cuts down on errors but also helps you stay compliant with industry standards.

With tools for importing and auto-generating serial numbers, the app streamlines your workflow, saving you both time and effort. Plus, it gives you full visibility, so you can trace each part back to its source and maintain complete control over your stock.

In this guide, we'll show you how to activate and manage serial numbers to simplify your inventory management.

Activating Serial Numbers

To get started, click Settings > Library > Parts



Click into a Part, and then click Edit.

Keep in mind, you will not be able to enable the Serial Number feature if the part is already assigned to stock.

Settings / Library / Parts / 002

002 Edit

Part Details

Number* 002 Part Reference

Description* 002

Serial Numbered ☐ ?

Make

Model

Library* Eligendi corrupti commodi. +

Tag(s) Please select an option...

Category Please select an option...

Quantity* 1 Unit of Measure

Price Per Unit* 0.00 Sell Per Unit ?

Thumbnail

No Image Available

Attachments

+ Add Attachment

Please ensure your upload is under 25MB and contains less than 5 files.

Linked Supplier

+ Add Supplier Rate

No data to display

Toggle the enable Serial Numbered option

Serial Numbered ☒ ?

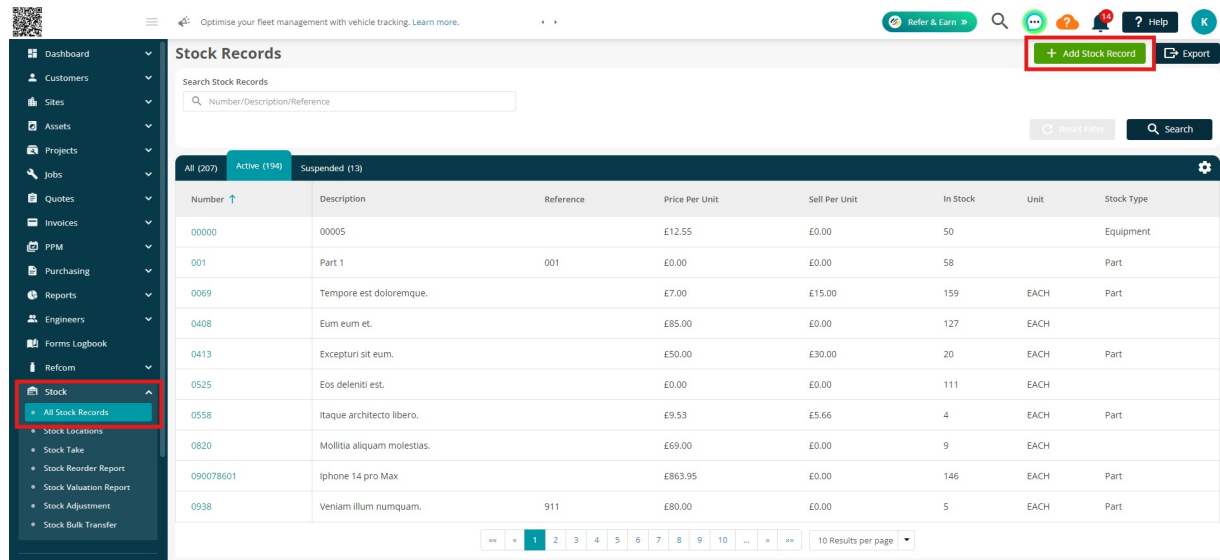
Make

Model

Setting up the Serial Numbers

When you create a stock record and choose a part that has been enabled for Serial Numbers, you'll need to give each stock item a number.

Click into Stock > All Stock Records > Add Stock Record



Stock Records

Search Stock Records

Number/Description/Reference

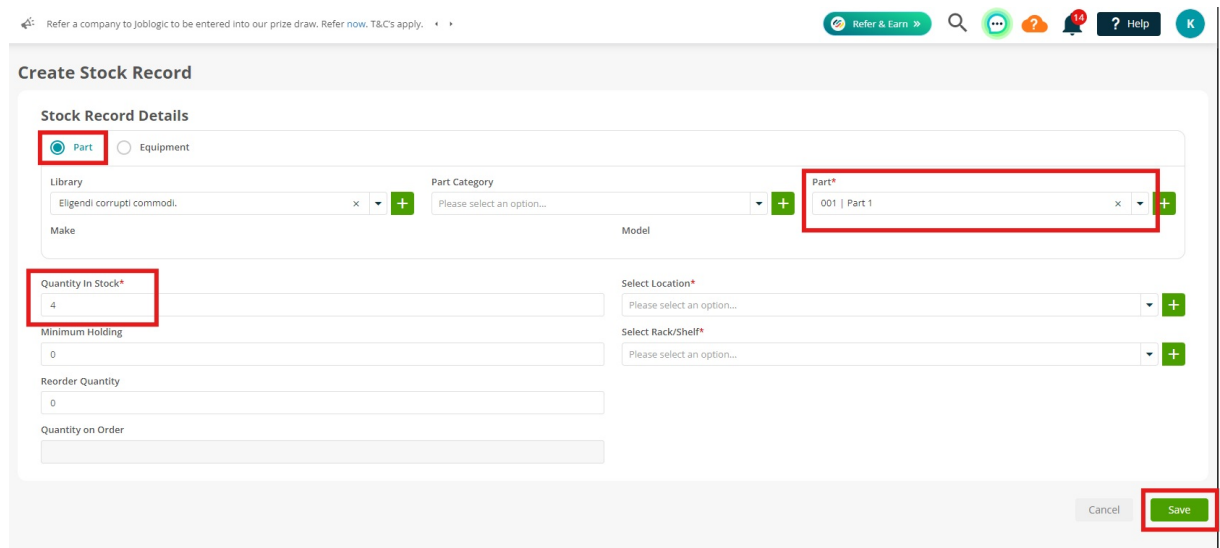
Reset Filter Search

All (207) Active (194) Suspended (13)

Number	Description	Reference	Price Per Unit	Sell Per Unit	In Stock	Unit	Stock Type
00000	00005		£12.55	£0.00	50		Equipment
001	Part 1	001	£0.00	£0.00	58		Part
0069	Tempore est doloremque.		£7.00	£15.00	159	EACH	Part
0408	Eum eum et.		£85.00	£0.00	127	EACH	
0413	Excepturi sit eum.		£50.00	£30.00	20	EACH	Part
0525	Eos deleniti est.		£0.00	£0.00	111	EACH	
0558	Itaque architecto libero.		£9.53	£5.66	4	EACH	Part
0820	Mollitia aliquam molestias.		£69.00	£0.00	9	EACH	
090078601	Iphone 14 pro Max		£863.95	£0.00	146	EACH	Part
0938	Veniam illum numquam.	911	£80.00	£0.00	5	EACH	Part

10 Results per page

Choose your Part from the dropdown, fill in your quantity, and enter any other details as needed.



Create Stock Record

Refer a company to Joblogic to be entered into our prize draw. Refer now. T&C's apply.

Refer & Earn

Stock Record Details

☒ Part ☐ Equipment

Library: Eligendi corrupti commodi. x +

Part Category: Please select an option... +

Part*: 001 | Part 1 x +

Make: Model:

Quantity In Stock*: 4

Minimum Holding: 0

Reorder Quantity: 0

Quantity on Order:

Select Location*: Please select an option... +

Select Rack/Shelf*: Please select an option... +

Cancel Save

When you click Save a new window will pop up

Here you can manually type in your serial numbers or choose to import or auto generate them.

Add Serial Numbers

Part 1 0 / 4

1	001	
2	001	
3	001	
4	001	

Cancel Confirm

Auto generating them will simply find the next available numbers from active stock items for this part.

Click Confirm if you are happy with the new serial numbers

Add Serial Numbers

Part 1 4 / 4

1	001	31
2	001	32
3	001	33
4	001	34

Cancel Confirm

A tab is available within your Stock Record, titled Serial Numbers, which provides a table view of your stock locations and serial numbers.

Refer a company to Joblogic to be entered into our prize draw. Refer now. T&C's apply.

Refer & Earn

Details Stock Location **Serial Numbers** History

Stock Records / 001

Search Serial Number

Serial Number / Location / Rack Shift

Reset Filter Search

Serial Numbers List

Location	Rack / Shelf	Serial Number	Date Received	Source	Status
Amosfort Violette Legros	Amosfort Violette Legros	001-34	25/10/2024 12:51 PM	Initial Creation	In Stock
Amosfort Violette Legros	Amosfort Violette Legros	001-33	25/10/2024 12:51 PM	Initial Creation	In Stock
Amosfort Violette Legros	Amosfort Violette Legros	001-32	25/10/2024 12:51 PM	Initial Creation	In Stock
Amosfort Violette Legros	Amosfort Violette Legros	001-31	25/10/2024 12:51 PM	Initial Creation	In Stock
Ibrahim stock location	Rack Ibrahim	001-30	25/10/2024 09:56 AM	PO Receipt	In Stock
Ibrahim stock location	Rack Ibrahim	001-29	25/10/2024 09:56 AM	PO Receipt	In Stock
Ibrahim stock location	Rack Ibrahim	001-28	25/10/2024 09:56 AM	PO Receipt	In Stock
Cale Effertz	East Boydbury Aleen Thiel	001-789	25/10/2024 04:25 AM	Qty Update	In Stock
Cale Effertz	East Boydbury Aleen Thiel	001-456	25/10/2024 04:25 AM	Qty Update	In Stock
Cale Effertz	East Boydbury Aleen Thiel	001-123	25/10/2024 04:25 AM	Qty Update	In Stock

10 Records per page

Create stock PO

Similarly, when creating Stock Purchase Orders, you'll be able to enter serial numbers for your new stock items here too, if it's associated with a relevant part.

Once you've added your Stock PO, click into the Items tab.

To read more about setting up your Purchase Orders, please click [here](#).

Click the three dots against an item, to Deliver, or simply click Deliver All at the top of the page.

Optimise your fleet management with vehicle tracking. [Learn more.](#)

Refer & Earn

Details **Items** Supplier Invoices Notes History

Purchase Orders / PO00000776

Cancel Share + Add Item **Deliver All**

Purchase Order Items

Description	Date	Quantity	Invoiced	Matched Qty.	VAT	List Price	Sub Total	Discount	Total Excluding VAT	Delivered?	Delivered By	Delivered On	Nominal Code
003 003	25/10/2024	3.00	0.00		15.00%	£0.00	£0.00	0.00%	£0.00	Not Delivered			

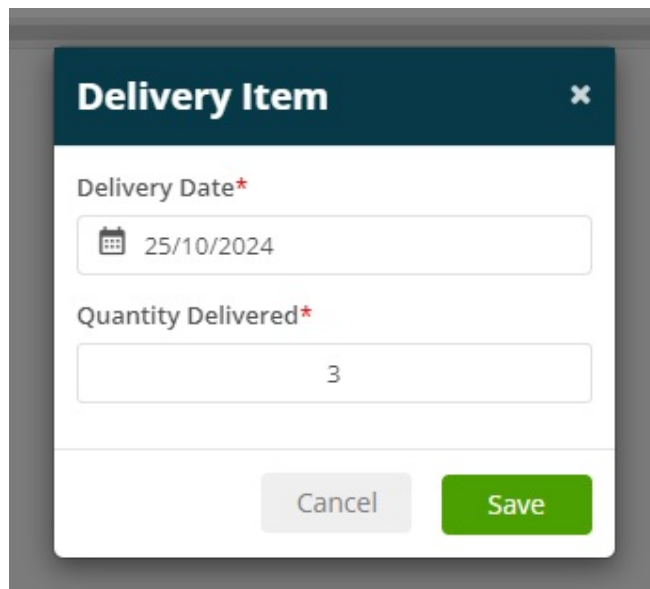
Default Subcontractor Purchase Order Nominal

Totals

Total Excluding VAT	£0.00
Discount	£0.00
VAT Amount	£0.00
Total	£0.00

Deliver Not Required Delete

Confirm the details and click Save.

A modal form titled "Delivery Item" with a close button (X) in the top right corner. It contains two input fields: "Delivery Date*" with a calendar icon and the date "25/10/2024", and "Quantity Delivered*" with the number "3". At the bottom, there are two buttons: "Cancel" (grey) and "Save" (green).

Delivery Item ✕

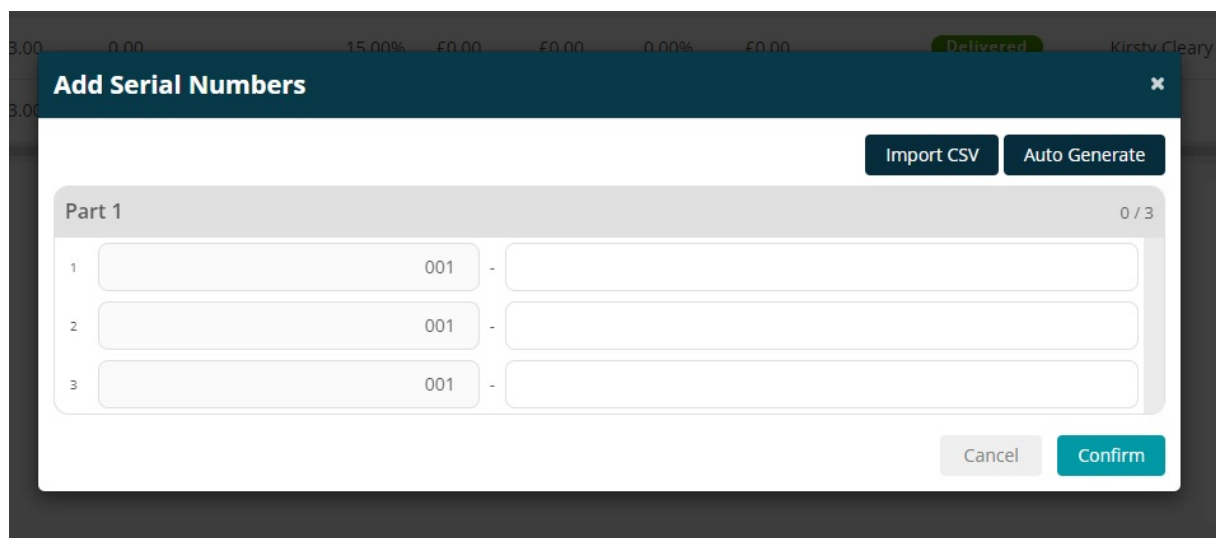
Delivery Date*
25/10/2024

Quantity Delivered*
3

Cancel Save

Next, you'll see a pop up to add Serial Number for the new parts you are ordering.

Again, you can import or auto-generate to save time manually entering numbers, if you prefer.

A modal form titled "Add Serial Numbers" with a close button (X) in the top right corner. It has two buttons at the top right: "Import CSV" and "Auto Generate". Below these is a table with 3 rows and 2 columns. The first column is labeled "Part 1" and the second column is labeled "0 / 3". The table contains three rows of input fields. The first row has the number "1" in the first column and "001" in the second column. The second row has the number "2" in the first column and "001" in the second column. The third row has the number "3" in the first column and "001" in the second column. At the bottom right, there are two buttons: "Cancel" (grey) and "Confirm" (teal).

Add Serial Numbers ✕

Import CSV Auto Generate

Part 1	0 / 3
1	001
2	001
3	001

Cancel Confirm

Click Confirm to complete the process.

Add Serial Numbers

Import CSV Auto Generate

Part 1 3 / 3

1	001	-	35
2	001	-	36
3	001	-	37

Cancel Confirm

Add Material to Job

You can issue out specific stock items easily, helping you keep track of what is where.

To do this, click through to your Job, via Job > All Jobs > find job > Cost tab

Optimise your fleet management with vehicle tracking. Learn more.

Refer & Earn

Details Contacts Assets Tasks **Costs** Visits Subcontractor SOR Items History Info Job Forms Attributes

Jobs / CATTY00005 Attended

Complete job Log Related Work

Job Summary

Customer 1 Utama Shopping Centre Site [AnP] Mechanism 123456

Details

Job Details

Status: Attended

Primary Job Trade: Please select an option...

Customer Contract: Please select an option...

Secondary Job Trade(s): Please select option(s)

Job Type: Cat

Preferred Appointment Date: 15/10/2024 04:47 PM

Job Category: Please select an option...

Customer Order Number: Vh

Description: Bh

Reference Number

Click to add a Material line

Refer a company to Joblogic to be entered into our prize draw. Refer now. T&C's apply.

Refer & Earn

Jobs / CATTY00005 Attended

Budget Display

Accept Costs

Log Related Work

Add Invoice

Share

Profitability

Actual Profit to Date £0.00

Selling Rate
All Chargeable Works

Quoted Value
N/A

Schedule of Rates
This toggle will make all costs non-chargeable other than SOR Costs

Description	Date Incurred	Engineer/Subcontractor	Quantity	Cost	VAT	Subtotal Cost	Chargeable	Uplift	Sell	Subtotal Sell	Status
Labour						£0.00				£0.00	+
Overtime						£0.00				£0.00	+
Travel						£0.00				£0.00	+
Mileage						£0.00				£0.00	+
Material						£0.00				£0.00	+
Expenses						£0.00				£0.00	+
Call-out					N/A					£0.00	+
Other						£0.00				£0.00	+

Choose a relevant part, add a quantity and tick 'Issue from Stock' before clicking Save.

Add Material Cost

001 | Part 1

Make	Quantity	2	Total Sell (Ex.VAT)	£0.00	Chargeable type
Model	Total Cost (Ex.VAT)	£0.00	Sell Tax Value	£0.00	Calculated Pric...

☒ Engineer ☐ Engineer Team

Date* 25/10/2024 06:59 PM

Number 001 Cost Per Unit* £ 0.00 Quantity* 2

☒ Part ☐ Equipment

Library Eligendi corrupti commodi. Part Category Please select an option...

Part * 001 | Part 1

Location * Amosfort Violette Legros Rack/Shelf * Amosfort Violette Legros

Tag(s) Please select option(s)

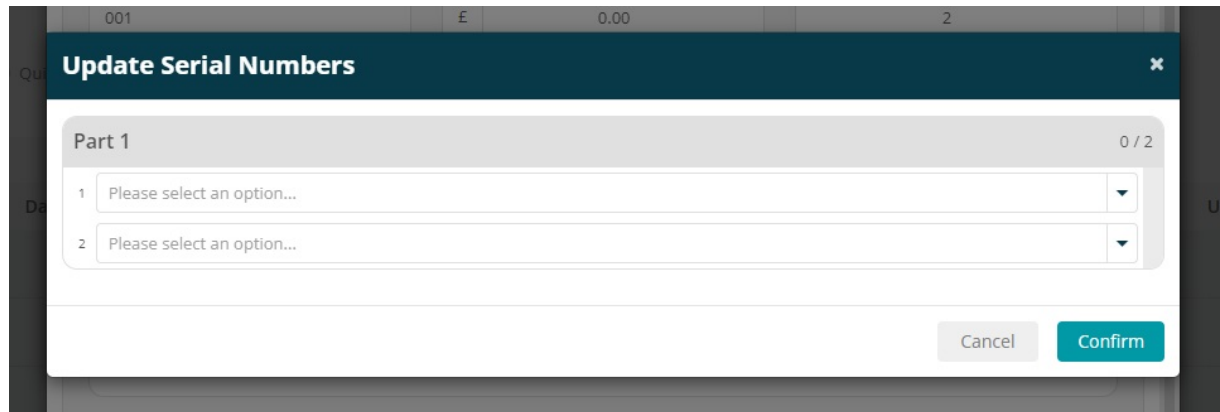
☒ Calculated Price(Selling Rate) ☐ Fixed Price ☐ Non-Chargeable ☐ Quoted Value

Uplift* % 10 Sell Per Unit* £ 0.00 Tax Rate* Nobis aut voluptatem. (15.00%)

+ Add a New Item 1 of 10 New Item(s) Added

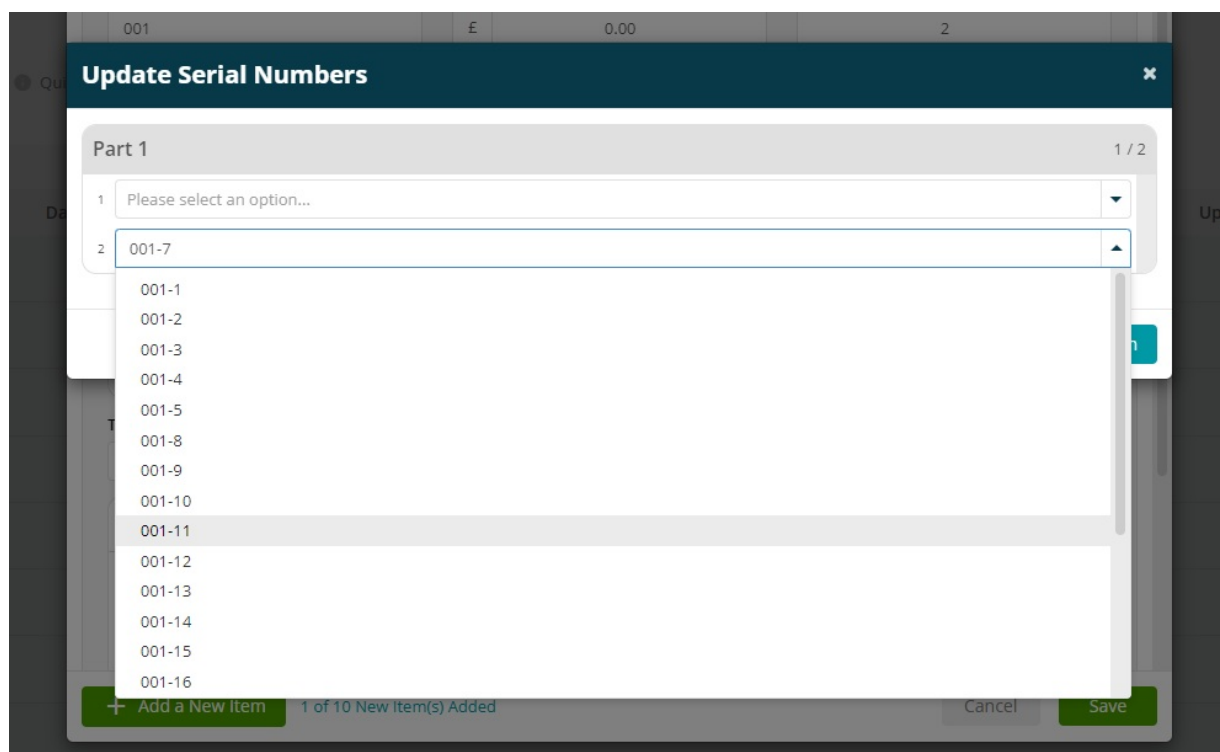
Cancel Save

A new pop up will appear where you can 'Update Serial Numbers'



Here, you can choose which serial numbered stock items to issue to this job.

Click Confirm when you are happy with the selections.



Further Support

For further information or assistance with the above, contact our Support Team on 0800 326 5561 or email support@joblogic.com. Alternatively, our Customer Success Management team can be reached by emailing customersuccess@joblogic.com

Publishing Details

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