

How to Process and Verify a Technology Special Order

Technology special orders follow the same general verification process as other special orders. However, **additional steps are required in WinPrism 301, including serialization when applicable.**

Serialization is the process of recording a product's unique serial number in the system. This step is critical for technology items, as it ensures accurate tracking, inventory control, and proper customer fulfillment. **Any technology item that requires serialization must be serialized in 301 before the order can be completed.**

Important: Always follow data accuracy procedures when handling technology items. When verifying a tech special order, confirm the catalog number matches across all sources the physical item, the receiving document, and the 301 system. If there is any uncertainty or mismatch, stop and notify a lead or manager before proceeding.

Step 1: Identify and Prioritize the Tech Special Order

After receiving check-in is completed, review the receiving documents. Orders may be mixed with regular merchandise, so you must:

- Check the **Comment** section on the receiving document
- Look for a **CSQ number** (example: CSQ832647)
- Once identified, **prioritize the tech special order** and set it aside for verification

Step 2: Verify the Item Count

- Physically count the item(s)
- Confirm the quantity matches the receiving document
- Verify the correct item, model, and description

If any discrepancies are found, **stop and notify a lead or manager** before proceeding.

Step 3: Access the Order in 301

Unlike non-tech special orders, **technology special orders are processed directly in 301.**

1. Log into **WinPrism**
2. Navigate to the **301 (Purple Tab)**
3. Locate the PO/GM using:
 - o PO or GM number
 - o Vendor name
 - o SKU
 - o Catalog Number (Example for apple specificity a Catalog Number will look like this MW123LL/A)
 - o Item description (if needed)

Step 4: Verify Item Details in 301

- Confirm the item listed in 301 matches the physical item by catalog or XREF
- Check quantities, SKU, and descriptions
- Ensure the order is open and ready for processing

Example: Identifying a Tech Special Order in 301 (Purple Tab)

Below is an example of how a **technology special order** appears in **301 (Purple Tab)** after entering the PO/GM.

- The screen will look **exactly the same as any other order**
- The key difference is found in the **Comment section**

In the Comment section, you may see:

“CSQ26728 – CAMPUS IT DEP”

The screenshot displays the '301 Receiving' interface. At the top, there are navigation options for 'All Locations' and a search bar containing 'gm039300'. The main section shows order details for 'DELL MARKETING L.P.' with a status of 'OPEN'. Key fields include PO Number (GM039300), Vendor (B36905), PO Date (1/14/2026), and Total Qty (2). The comment section contains the text 'CSQ26728 - CAMPUS IT DEP'. Below the details is a table with columns for Link, Location, Sy, O, SKU, Cat #/SBN, Description, TI, Term, Request, Out Qty, Rcv, Can Qty, BO Qty, Discr Qty, Ext. Cost, Up, and Pricing. The table contains one row for a Dell Pro Max Tower T2 (FCT2250) CT with a quantity of 2 and an extended cost of \$ 5169.48.

Link	Location	Sy	O	SKU	Cat #/SBN	Description	TI	Term	Request	Out Qty	Rcv	Can Qty	BO Qty	Discr Qty	Ext. Cost	Up	Pricing
	BRONCO BO	GM		12943074	210-BPSQ	DELL PRO MAX TOWER T2 (FCT2250) CT	D	Non-Term	2	2	0	0	0	0	\$ 5169.48	0	

Important – CAMPUS IT DEP Orders

- Special orders labeled “CAMPUS IT DEP” are *high-priority technology orders*
- These orders must be:
 - Received immediately
 - Labeled
 - Delivered to the Tech Counter as quickly as possible
- Do not delay processing or staging of these items

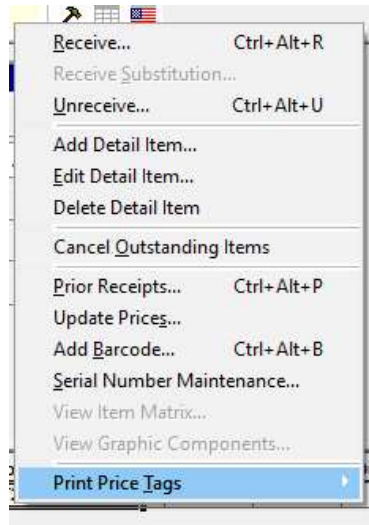
! Reminder: CAMPUS IT DEP orders follow the same processing steps, but require faster turnaround and immediate handoff to Tech. !

Step 5: Serialize the Item (If Required)

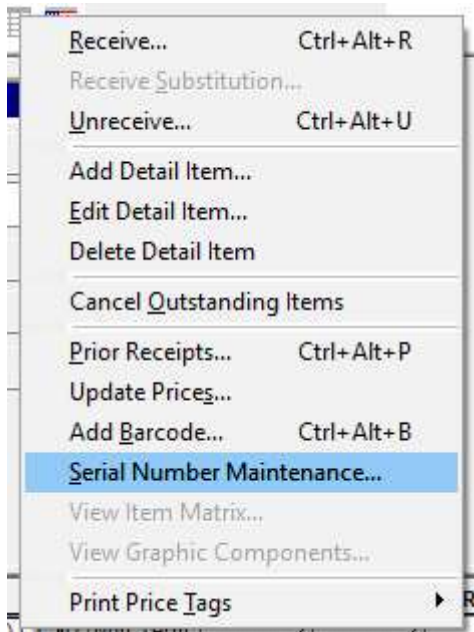
Serialization is completed **within 301** and is required for certain technology items (e.g., Apple products, laptops, Dell computers).

A. Check if the Item Requires Serialization

1. While in **301**, locate the item you need to verify.
2. **Right-click** on the item.
3. A menu will appear with multiple options. →



4. Select **Serial Number Maintenance**



B. Review the System Prompt

After selecting **Serial Number** in 301, one of **three prompts** may appear:

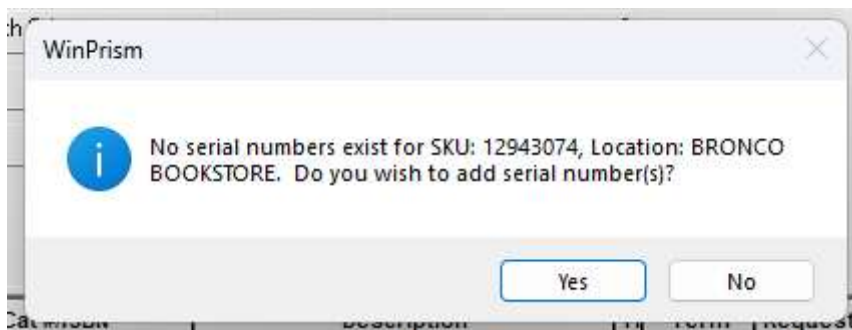
1. Serial Number Entry Prompt (Serialization Required)

If the item requires serialization, a serial number entry window will appear.

(Image Placeholder – Serial number prompt)

2. No-Serialization Error Message (Serialization Not Required)

If the item does **not** require serialization, this message will appear indicating that no serial number is needed. Just hit cancel then receive it.



3. Serialization Error Prompt (Manual Entry Required)

In some cases, you may receive an **error message even though the item is known to require serialization** (for example, Apple products, laptops, or Dell computers).

(Image Placeholder – Serialization error prompt requiring manual action)

Important: When this error appears for a technology item that is known to be serialized, **do not proceed in 301**. The serial number must be **manually added in 105 using the SKU attached to the item**.

C. Enter the Serial Number

If the **1. serial number entry prompt** appears in 301:

- Locate **“Enter Serial Number”** near the bottom of the window
- **Scan or manually type** the serial number into the field
- You may need to **click Enter** for the serial number to register
(Image Placeholder – Serial number entry field)

D. Confirm Serialization in 301

After the serial number is entered:

- **Highlight the item** to confirm it has been serialized
(Image Placeholder – Serialized item highlighted in 301)
- Once confirmed, **receive the item in 301**

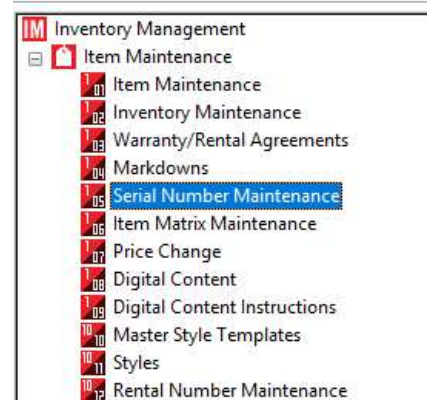
The image shows two sequential screenshots of a table. The table has columns: Description, Ti, Term, Request, Out Qty, Rcv, and Can. The first screenshot shows the 'Rcv' column with a value of 0, which is highlighted with a blue box. An arrow points to the second screenshot, where the 'Rcv' column now has a value of 2, also highlighted with a blue box.

E. Verify or Manually Add Serial Number in 105

Navigate to **105 (Serial Number Maintenance)**.

- 105 is located under the

Red Tab → **+ Item Maintenance** → **105 Serial Number Maintenance**



- When you click on 105 your screen should look like this:

The screenshot shows the '105 Serial Number Maintenance' interface. At the top, there is a search bar with 'Description' selected. Below the search bar is a form with the following fields:

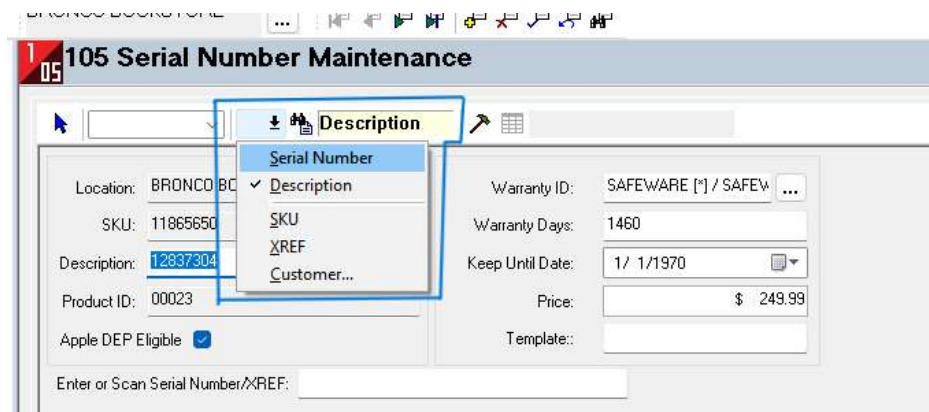
- Location: BRONCO BOOKSTORE
- SKU: 11865650
- Description: 12837304
- Product ID: 00023
- Apple DEP Eligible:
- Warranty ID: SAFEWARE [*] / SAFEV ...
- Warranty Days: 1460
- Keep Until Date: 1/ 1/1970
- Price: \$ 249.99
- Template:

Below the form is a table with the following columns: Note, Serial #, Customer, Comment, Receive Date, Sale Date, Warranty Exp Date, Item #, Type, Tracking #, Tag Printed, XREF, and Price.

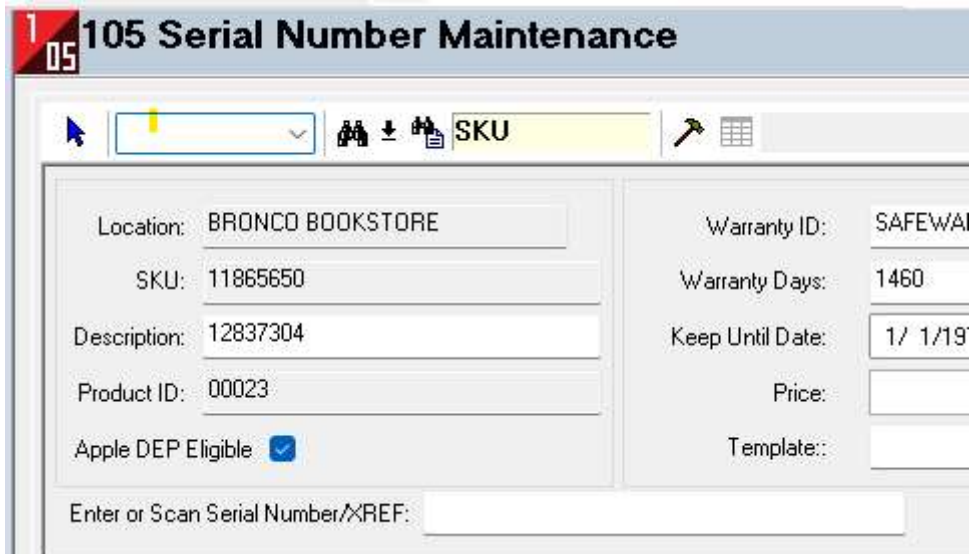
Note	Serial #	Customer	Comment	Receive Date	Sale Date	Warranty Exp Date	Item #	Type	Tracking #	Tag Printed	XREF	Price
	0003025915			1/9/2014	1/1/1970	1/1/1970	00002	Purchase Order		No	400023000023	\$ 249.99
	0003025910			1/9/2014	1/1/1970	1/1/1970	00007	Purchase Order		No	400023000078	\$ 249.99
	0003025909			1/9/2014	1/1/1970	1/1/1970	00008	Purchase Order		No	400023000085	\$ 249.99
	0003025908			1/9/2014	1/1/1970	1/1/1970	00009	Purchase Order		No	400023000092	\$ 249.99
	0003025907			1/9/2014	1/1/1970	1/1/1970	00010	Purchase Order		No	400023000108	\$ 249.99
	1000050107		Purchase Program, z/Found	5/9/2016	12/21/2018	1/1/1970	00011	Purchase Order		No	400023000115	\$ 249.99
	NL3840LQ			1/9/2019	1/1/1970	1/1/1970	00016	Purchase Order		Yes	400023000160	\$ 249.99
	sgg7x83bnf8j			1/15/2019	1/1/1970	1/1/1970	00017	Purchase Order		No	400023000177	\$ 249.99
	799368179306	Lopez, Nathan		2/12/2019	2/12/2019	1/1/1970	00018	Purchase Order		No	400023000184	\$ 249.99
	SDMPY4103K06M			2/15/2019	1/1/1970	1/1/1970	00019	Purchase Order		No	400023000191	\$ 249.99
	CS70284-1			6/4/2020	1/1/1970	1/1/1970	00020	Purchase Order		No	400023000207	\$ 249.99
	CS70284-2			6/4/2020	1/1/1970	1/1/1970	00021	Purchase Order		No	400023000214	\$ 249.99

Searching for the Item in 105

- Click the **drop-down arrow** next to the binoculars



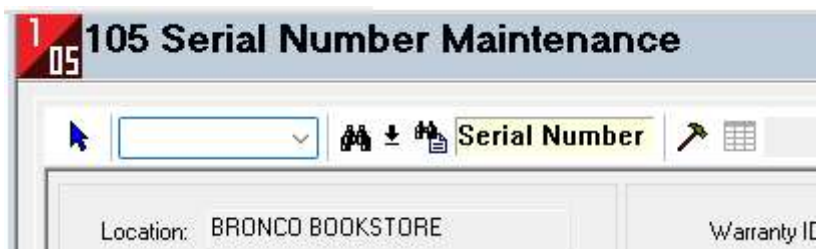
- Select **SKU** (this is the most reliable search option)



Manual Serial Number Entry (If Required)

If the item produces a **serialization error in 301** but is known to require a serial number, the serial must be **manually added in 105**.

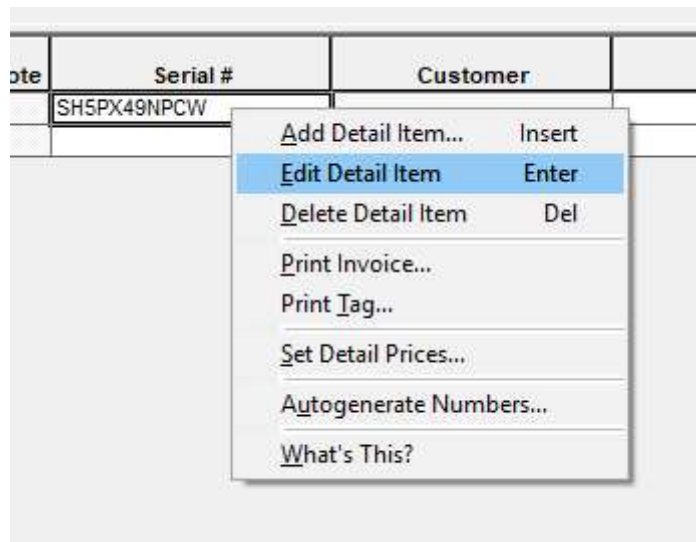
1. Use the **SKU attached to the physical item** to locate the item in **105 (Serial Number Maintenance)**.
2. Click the pointing down arrow and change it to serial number so the yellow box says "Serial Number"



3. **Manually add the serial number** for the item. Below in the highlighted section is where you will scan the serial number.

Location: BRONCO BOOKSTORE	Warranty ID: <input type="text"/>
SKU: 12925865	Warranty Days: 0
Description: M5 IPP 11 5121 SG SILVER	Keep Until Date: 1/ 1/1970
Product ID: 03055	Price: \$ 899.00
Apple DEP Eligible <input type="checkbox"/>	Template: <input type="text"/>
Enter or Scan Serial Number/REF: <input type="text"/>	

4. Confirm the serial number:
- o Matches the **physical item**
5. Once the serial number is added:
- o Locate the serial number you just created (Will show up at the end of the list)
 - o **Right-click** on the serial number
 - o Select **Edit Item**



6. In the Edit Item screen:

- Manually add the **Tracking Number (PO/GM)**
- Save the changes (Press OK)

The screenshot shows a software window titled "Modify Serial Number Maintenance Item". At the top left, the price "\$ 899.00" is displayed. The window is divided into several sections: "Item Information" with fields for Location (BRONCO BOOKSTORE), Description (M5 IPP 11 5121 SG SILVER), SKU (12925865), and Product ID (03055); "Edit Information" with a Serial # field (SH5PX49NFCW), a Customer dropdown, a "Not Available" checkbox, and a Comment field; "Dates" with dropdowns for Receive Date (10/22/2025), Sale Date (1/1/1970), and Warranty Exp Date (1/1/1970); and "Tracking" with a Tracking Type dropdown (Purchase Order) and a Tracking # field (GM038932, highlighted in yellow). At the bottom, there is an "XREF" section with an XREF Type dropdown, an XREF field (403055000016), and a "Recalc XREF" button. "OK" and "Cancel" buttons are at the very bottom.

Important: This step links the serial number to the correct PO/GM. **Do not skip this step. Missing the tracking number will cause the item to be untraceable in the system.**

Step 6: Complete Processing in 301

- Finalize the receiving steps in **301** as instructed
- Ensure all required fields are completed
- Save and confirm the transaction
- Print sticky tags to GMT3 to add to the product

Step 7: Label and Deliver the Tech Special Order

- **Print and attach the special order label** to the item or package
- Ensure the label is **secure and clearly visible**
- **Immediately deliver the item to the Tech Counter on the sales floor**
 - This applies to **all technology items**

- Do not stage tech items in the general special order area unless it is a big item or items

Step 8: File Technology Special Order Paperwork

- After the item has been received in the system:
 - Take the **receiving paperwork** to the **clock-in / clock-out room**
 - Place the paperwork in **Keith Grissom's cubby**
- Do not place tech paperwork in general receiving folders

Step 9: Send a Teams Completion Message

Once processing and handoff are complete, notify leadership via **Microsoft Teams**.

Message format:

CSQ832647 – [Customer Name] tech order processed and delivered to Tech Counter

Example:

CSQ832647 – Jamie Snyder tech order processed and delivered to Tech Counter

This allows leadership to proceed with customer communication or pickup scheduling.

Key Tech-Specific Reminders

- Technology special orders are completed **in 301**
- Serialization is required **only when prompted**
- Some items may require **manual serial entry in 105**
- Labels are required for **all tech items**
- Tech items must be **delivered directly to the Tech Counter**
- When unsure, **stop and ask a lead or manager**