



# WAREHOUSE

## MANAGE INVENTORY ADJUSTMENT

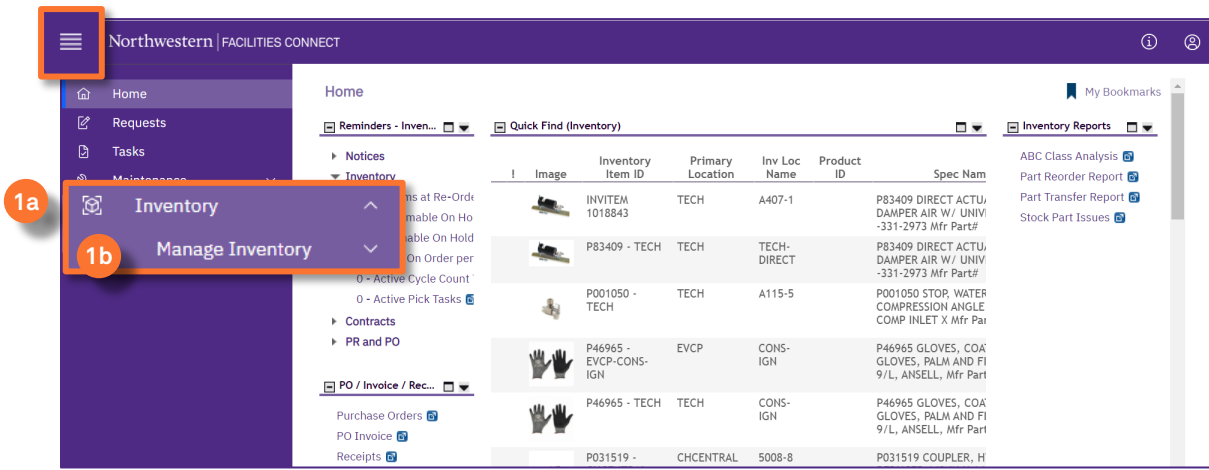
Provides guidance for managing adjustments to inventory items

### DIRECTIONS:

**1** From the Facilities Connect Home Screen, navigate to the hamburger menu:

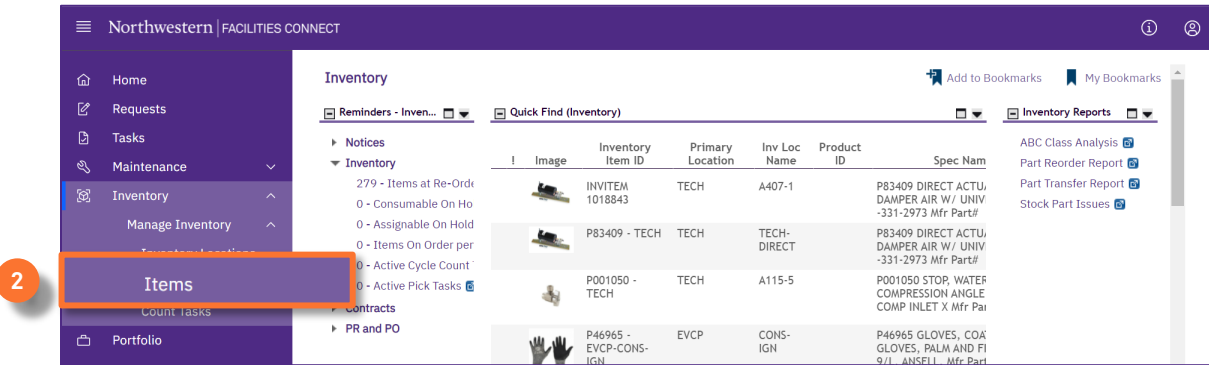
**1a** Click on the **Inventory** section drop-down arrow.

**1b** Click on the **Manage Inventory** section drop-down arrow.



**2** From the **Manage Inventory** drop-down menu:

**2** Click on **Items**.



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## DIRECTIONS:

**3** Upon clicking, all **Inventory Items** will display.

To find a single inventory item,

- 3a** Type in the **Item ID** or **Item Name** to find the exact match for your review.
- 3b** Type in your site location under **Primary Location**, it will list all inventory items at your location.

Item Name	Item ID	C Class	Service Class	Stock Category	Primary Location	Storage Area	Quantity On Hand
Contains	Contains	Contain	Contains	Contain	Contains	Contains	More Than
DIRECT GREASE...	INVITEM ...	CON-102950...	CON-102...	B Class	Inventory	Non-Stocked	TECH TECH-DIRECT
1017525 - TECH...	1017525 - ...	1017525 - T...	CON-103...	C Class	Inventory	Stocked	TECH A135-9
1018265 - EVCP...	1018265 - ...	INVITEM 10...	INVITEM ...	C Class	Inventory	Stocked	EVCP BTLR-BLDG
1018266 - EVEL...	INVITEM ...	BREAKER, CI...	CON-103...	B Class	Inventory	Stocked	EVELEC B103-11
1018267 - EVEL...	INVITEM ...	BREAKER, CI...	CON-103...	B Class	Inventory	Stocked	EVELEC B103-11
1018268 - EVEL...	INVITEM ...	BREAKER, Q...	CON-103...	B Class	Inventory	Stocked	EVELEC B103-11
1018854 - EVCP...	1018854 - ...	CON-103098...	CON-103...		Inventory	Stocked	EVCP C500-FLR
1018855 - EVCP...	1018855 - ...	CON-103098...	CON-103...		Inventory	Stocked	EVCP C500-FLR
1019708 - CHCE...	1019708 - ...	GLOVES, DIS...	CON-103...	A Class	Inventory	Stocked	CHCENTRAL DESK

- 3c** Click on the **Name** of the Inventory item.
- 3d** Upon clicking, the **Inventory Item page** will open below.
- 3e** Click the **Launch Window** button to open in a new window.

**Inventory Item: INVITEM 1017120**

General Contacts Notifications Notes & Documents History Audit Actions

(Required): General Details Required for Inventory Item.

Activate Save Save & Close More x

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## DIRECTIONS:

4

In the Inventory Item window:

4a

Click on **Revise**.

Inventory Item: INVITEM 1067511

General Contacts Notifications Notes & Documents History

(Required): General Details Required for Inventory Item.

**General**

ID INVITEM 1067511 Status Active

\* Name 10" hammer

Description

**Units**

\* Quantity each \* Currency US Dollars

**Specification (Stock Item)**

ID Image

Spec Name

Spec Class

Total Cost 5.00

Scroll down to the Adjustments section (bottom right):

4b

Click on **Adjustment**.

**Inventory Purchasing Details**

Purchasing Reorder Logic ROP Stock Category Stocked

U. Purchasing Reorder Point (ROP) 12 Economic Order Quantity (EOQ) 0 EOQ Units Quantity each

V. Reorder Logic Calculation (T+Q) 0

W. Reorder Logic - Reorder Point (V-U) -12 Requested ROP Delivery Duration 0

**Inventory Summary**

Q. Quantity On Order 0 S. Total On Hand (R-H+P) 1

R. Quantity Received 0 T. Total Available (S-D) 0

Unit Price 5.00 US Dollars Estimated Stock Value On Hand 5.00 US Dollars

**Hold or Pending Issue** **Issued or Returned** **Adjustment** **Adjustment**

A. Quantity Hold	0	E. Quantity Issued	0	I. Quantity Adj by Count	0
B. Quantity Back Ordered	0	F. Quantity On Loan	0	J. Quantity Transferred In	0
C. Quantity Safety Stock	1	G. Quantity Returned	1	K. Quantity Transferred Out	0
D. Total Pending Issue (A+B+C)	1	H. Total Issued (E+F-G)	-1	L. Quantity Lost	0
				M. Quantity Retired	0
				N. Quantity Under Repair	0
				O. Quantity Damaged	0
				P. Total Adjustments (I+J-K-L-M-N-O)	0

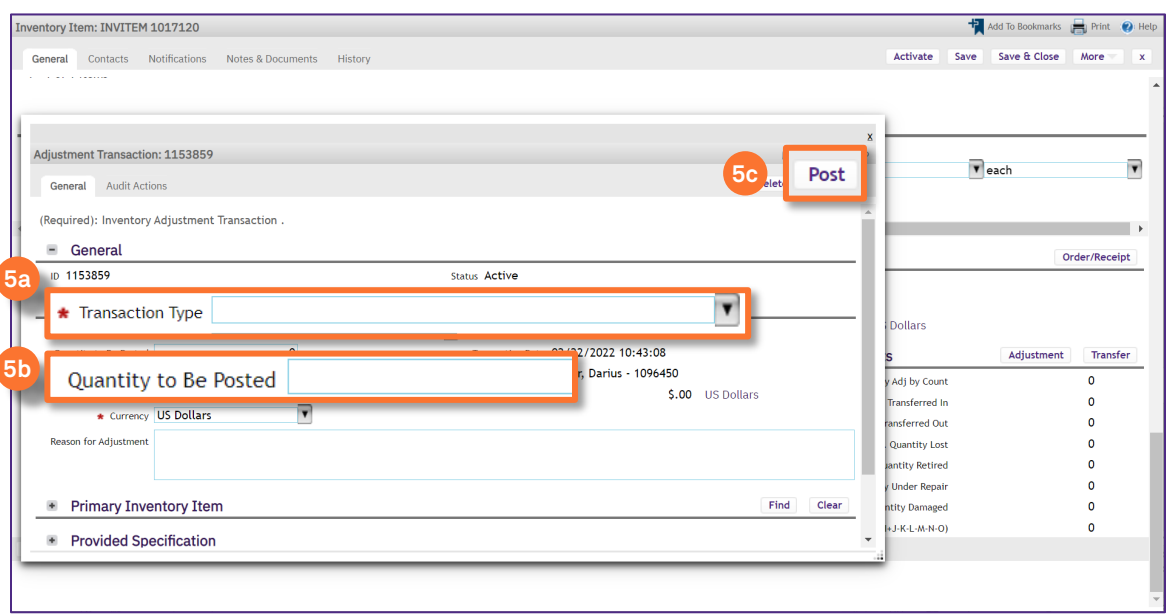


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## DIRECTIONS:

**5** Upon clicking, the **Adjustment Transaction** window opens:

- 5a** Choose **Transaction Type** from the list.
- 5b** Enter **Quantity** to be posted.
- 5c** Click **Post** on the top right corner.



### ▼ INFORMATION

#### Additional Reference Note for Transaction Type to use:

- ❖ **Inventory Return:** To adjust return item
- ❖ **Inventory Lost:** For items taken away
- ❖ **Inventory Damaged:** To report damaged Inventory quantity
- ❖ **Inventory Cycle Count:** For Cycle count related adjustment only
- ❖ **Inventory Repair:** Currently use it only for UOM conversion
- ❖ **Inventory Retire:** To retire inventory



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## DIRECTIONS:

**6** Finally, from the main Inventory Item window:

**6a** Click on the **History** tab.

**6b** Check that the adjustment entered is correct and the status is displayed as **Posted**.

**6a**

**6b**

Transaction ID	Type	Date	Quantity	Unit Price	Total Cost	Status	PO ID
1153859		02/22/2022 10:43:08	0 each	\$546.87	\$0.00	Active	
1148837	Inventory Issue	11/15/2021 11:35:57	0 each	\$546.87	\$0.00	Active	
<b>1054141</b>	<b>Inventory Issue</b>	<b>08/23/2020 13:55:15</b>	<b>1 each</b>	<b>\$546.87</b>	<b>\$546.87</b>	<b>Posted</b>	
1033945	Inventory Received	04/02/2020 10:49:00	1 each	\$546.87	\$546.87	Received	PUR1563850
1033011	Inventory On Order	03/19/2020 18:00:20	-1 each	\$546.87	\$0.00	Recalled	PUR1563850

**7** Click on **Save & Close** to close the window.