

WAREHOUSE

MANAGE INVENTORY ADJUSTMENT

Provides guidance for managing adjustments to inventory items

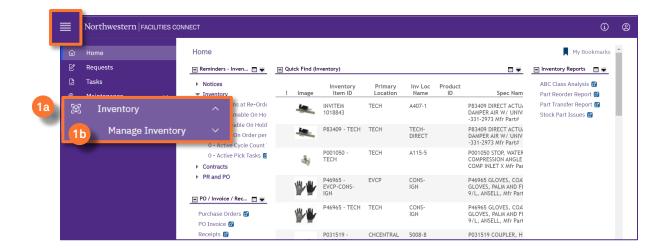
DIRECTIONS:



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



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



2

From the Manage Inventory drop-down menu:

Click on **Items**.

	Home		Inventory							📩 Add to Bo	ookmarks 🛛 📕 My Bookma
Ľ	Requests		🖃 Reminders - Inven 🔳 💌	🖃 Qu	ick Find (lı	nventory)					Inventory Reports
	Tasks		Notices			Inventory	Primary	Inv Loc	Product		ABC Class Analysis 🗃
S.	Maintenance	\sim	 Inventory 	!	Image	Item ID	Location	Name	ID	Spec Nam	Part Reorder Report 👩
-			279 - Items at Re-Orde		-	INVITEM	TECH	A407-1		P83409 DIRECT ACTU	Part Transfer Report 🖻
Ø	Inventory	^	0 - Consumable On Ho		-	1018843				DAMPER AIR W/ UNIV -331-2973 Mfr Part#	Stock Part Issues 🔯
	Manage Inventory	^	0 - Assignable On Hold		-	P83409 - TECH	TECH	TECH-		P83409 DIRECT ACTU	
			0 - Items On Order per		-			DIRECT		DAMPER AIR W/ UNIV -331-2973 Mfr Part#	
			0 - Active Cycle Count			P001050 -	TECH	A115-5		P001050 STOP. WATER	
	Items		0 - Active Pick Tasks 🙆			TECH	TECH	ATT5-5		COMPRESSION ANGLE	
_	Count lasks	_	 Contracts 							COMP INLET X Mfr Pai	



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DIRECTIONS:



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

To find a single inventory item,



Type in the Item ID or Item Name to find the exact match for your review.

Type in your site location under **Primary Location**, it will list all inventory items at your location.

Iten	ns							🛃 Ado	i to Bookmarks 🛛 📕 1	My Bookmarks
										Popup View
3a							3b		Inventory Proc	essing Form
Inv	Item Name		Item ID		C Class	Service Class	Stock Cate	Primary Location	ters	☆ ⊻ Quantity On
	Contains		Conta	iins	Contain	Contains	Contair	Contains	Contains	More Th
	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	

³⁰ Click on the **Name** of the Inventory item.

Upon clicking, the **Inventory Item page** will open below.

Click the Launch Window button to open in a new window.

	Items						拭 Add to Bool	kmarks 🛛 📕 My Bookmarl	ks
								Inline View	•
							Add Delete	Inventory Processing Form	1
\$	Inventory Iter	ms	~				Apply Filters Clear Filter	5 ≈ ☆ ⊻	
C		Item Name		Item ID	Spec Name	Spec ID	ABC Class	Service Class	
, ,		Contains		Contains	Contains	Contains	Contains	Contains	
		RECT GREASE T		NE INVITEN	1 1017120 INVITEM 1018265: CE	CON-1029508 GREASE		Inventory	- B Clas
	Items per pag	e: 50 ∨ 1	- 50 of 22690 item	S				of 454 pages	G
nvento	ry Item: INVITE	EM 1017120						Add To Bookmarks	Print 🕜 Hel

3e



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DIRECTIONS:

4a



In the Inventory Item window:

Click on Revise.

Inventory Item: INVITEM 1067511		🙀 Add To Bookmarks 🛛 🔒 Print 💡 Help
General Contacts Notifications Notes & Documents History		Refrestationy Revise More x
(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 S.00		

Scroll down to the Adjustments section (bottom right):

Click on Adjustment.

Purchasing Reorder Logic		R	OP V	Sto	ck Category	Stocked	Y		
U. Purchasing Reorder Point (ROP)			12	Economic Order Qua	ntity (EOQ)		0	EOQ Units Quantity	🔽 each
V. Reorder Logic Calculation (T+Q)			0						
W. Reorder Logic - Reorder Point (V-U)			-12	Requested ROP Delive	ry Duration	0	25	8	
 Inventory Summary 									Order/Rece
Q. Quantity On Order	0				S. To	tal On Hand (R-H+P)		1	
R. Quantity Received	0				Т.	Total Available (S-D)		0	
Unit Price	\$.00	US Dollars			Estimated S	Stock Value On Hand		\$.00 US D	_
Hold or Pending Issue		Hold		Issued or Returned		Issue		Adjustmen 4b	Adjustment Tra
A. Quantity Hold		0		E. Quantity Issued		0		I. Quantity Adj b	y Count
B. Quantity Back Ordered		0		F. Quantity On Loan		0		J. Quantity Transfe	erred In
C. Quantity Safety Stock		1	C	5. Quantity Returned		1		K. Quantity Transfer	red Out
D. Total Pending Issue (A+B+C)		1	H.	Total Issued (E+F-G)		-1		L. Quant	tity Lost
								M. Quantity	Retired
								N. Quantity Under	r Repair
								O. Quantity D	amaged
							F	P. Total Adjustments (I+J-K-L	-M-N-O)



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DIRECTIONS:



Upon clicking, the Adjustment Transaction window opens:

Choose **Transaction Type** from the list.



Click **Post** on the top right corner.

entory Item: INVITEM 1017120			Add To Bookmarks	📑 Print 🔅
General Contacts Notifications Notes & Documents History		Activate S	iave Save & Close	More
Adjustment Transaction: 1153859		<u>×</u>		
General Audit Actions	5c Post		▼ each	
(Required): Inventory Adjustment Transaction .				
= General			Or	der/Rece
ID 1153859 S	Status Active			
* Transaction Type	۲			
		Dollars		
Quantity to Be Posted	r, Darius - 1096450	S	Adjustment	Trans 0
Quantity to be Posted	\$.00 US Dollars	y Adj by Count Transferred In		0
* Currency US Dollars		ransferred Out		0
Reason for Adjustment		Quantity Lost		0
		antity Retired		0
Primary Inventory Item	Find Clear	y Under Repair ntity Damaged		0
ii		I+J-K-L-M-N-O)		0
 Provided Specification 		·		

▼ 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:



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						
Inventory	Item: INVITEM 10171						Add To I	Bookmarks 📇 Print 🕐 Help
General	Contacts Notifica	tions Notes & Document	story			Act	ivate Save Save	e & Close More 🚽 🗴
(Summan	(): Inventory Items Tra	ansaction History						
		and a contract of the contract						
E Tra	ansaction Log							
						Apply F	Filters Clear Filt	ers C) ☆ ±
1	Transaction ID	Туре	Date	Quantity	Unit Price	Total Cost	Status	PO ID
	Contains	Contains	Equals	Equals			Contains	Contains
	1153859		02/22/2022 10:43:08	0 ead	h \$546.87	\$.00	Active	
	1148837	Inventory Issue	11/15/2021 11:35:57	0 ead	h \$546.87	\$.00	Active	
1054141		Inventory Issue	08/23/2020 13	:55:15	1 ea	ach	\$546.87	\$546.87
	1033945	inventory received	04/02/2020 10:49:00	i eac	N \$546.87	\$546.87	кесеіуеа	PUR1563850
	1033011	Inventory On Order	03/19/2020 18:00:20	-1 ead	h \$546.87	\$.00	Recalled	PUR1563850 🖕
4								۱.
ltems p	oer page: 10 ∨	1 - 5 of 5 items					1	of 1 pages 🔹 🕨
Activate	Save Save & Close	e More x						

Click on Save & Close to close the window.

General Contacts Notifica		ory			A	7 sa Sav	re & Close
 Transaction Log 	ansaction mistory.						
					Apply F	Filters Clear Fil	lters 더 ☆
Transaction ID	Туре	Date	Quantity	Unit Price	Total Cost	Status	PO ID
Contains	Contains	Equals	Equals			Contains	Contains
1153859		02/22/2022 10:43:08	0 each	\$546.87	\$.00	Active	
1148837	Inventory Issue	11/15/2021 11:35:57	0 each	\$546.87	\$.00	Active	
1054141	Inventory Issue	08/23/2020 13:55:15	1 each	\$546.87	\$546.87	Posted	
1033945	Inventory Received	04/02/2020 10:49:00	1 each	\$546.87	\$546.87	Received	PUR1563850
	Inventory On Order	03/19/2020 18:00:20	-1 each	\$546.87	\$.00	Recalled	PUR1563850