Manage Adjustments - UOM Conversion

**PURPOSE:** Use this job aid to learn how to manage adjustments for UOM conversion.

1. From the Facilities Connect Home Screen, hover your cursor over **Inventory** and click on: **Manage Inventory** drop-down arrow.

2. From the Manage Inventory drop-down menu click on: **Items**.

For more information, visit the Facilities Connect website at www.northwestern.edu/fm/connect
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Find the item that you want to adjust. You can filter the display by entering the Item ID or Item Name. Then click on the item to open the Inventory Item page.
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1. Scroll Down to the middle of the page where it shows the inventory Details. Make Sure the Inventory Valuation Method is listed as LIFO for UOM conversion purpose. **Please note this step is very important, if the inventory valuation method is not set to LIFO, the UOM conversion will not work correctly.**

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Scroll down to the bottom of the page: Inventory Summary. For this example we are converting 11 box to each items. Assume 10 in each box, it will be 110 items total. **Estimate stock value on Hand** is $79.53. After the UOM conversion, the **Estimate stock value on hand** should remain the same value. Click on **Adjustments** section (bottom right).

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After it’s posted, the general page should display **Total on Hand** Quantity to 0 and the **Estimated Stock Value on Hand** should also display $0. Then Click on **Adjustment** button on the bottom right again.
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**Choose Transaction Type** *Inventory Return* to put the inventory back to stock. *User needs to calculate the correct unit price to put back into stock.* For this example, we are converting 11 box (10 in each box) to 110 total items, therefore the **Quantity to be posted** will be 110, **unit price** should be changed to $0.723. Then Click [Post] at the right top corner.
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After the UOM Conversion is posted, please go to Inventory Summary to confirm the total cost before the conversion should match the total cost after the UOM conversion. (For this example 11 box with unit price $7.23 have been converted to 110 Qty with unit price $0.723. The total cost of $79.53 remains same before and after UOM conversion.)