WAREHOUSE & INVENTORY

MANAGE INVENTORY ADJUSTMENT (UOM CONVERSION ONLY)

Provides guidance for how to manage adjustments for UOM conversion

DIRECTIONS:

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

   1a. Click on the Inventory section drop down menu.

   1b. Click on the Manage Inventory section drop down menu.

   1c. Click on Items.

2. Upon clicking, the Items screen will open:

   2a. If you know the ID of the item you want to update, click in the Item ID Contains text box, type the ID, and press Enter.

   2b. If you do not know the ID, type a partial or full word in the Item Name Contains text box, and press Enter.
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DIRECTIONS:

3. Click on the name of the item you want to update.

Upon clicking, the Inventory Item record will open in a new window:

4. Click on Revise.
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DIRECTIONS:

5 Scroll down to the Inventory Details section:

5 Confirm the Inventory Valuation Method is listed as LIFO for UOM conversion purpose.

- IMPORTANT

Please note this step is very important, if the inventory valuation method is not set to LIFO, the UOM conversion will not work correctly.

6 Scroll down to the Inventory Summary section:

6 After the UOM conversion, the Estimate stock value on hand should remain the same value.
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DIRECTIONS:

1. Locate the **Adjustments** section:
   - Click on the **Adjustment** button.

Upon clicking, an Adjustment Transaction window will open:

- **Transaction Type**: Choose **Inventory Repair** for UOM conversion.
- **Quantity to be posted**: Match the number to Total inventory on hand.
- **Reason for Adjustment**: “UOM Conversion”.
- Click **Post** at the top right corner.
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DIRECTIONS:

8 After posting, the Inventory Summary should display:

8a Total on Hand Quantity: 0

8b Estimated Stock Value on Hand: $0.

9 Locate the Adjustments section again:

9 Click on the Adjustment button.
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DIRECTIONS:

10 Upon clicking, an Adjustment Transaction window will open again:

10a **Transaction Type**: Choose **Inventory Return** to put the inventory back to stock.

10b **Quantity to Be Posted**: User needs to calculate the correct unit price to put back into stock.

10c Click **Post** at the right top corner

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.