

INVENTORY

EDIT ADJUSTMENT REQUEST

From this screen, you will be able to use the action button to **Edit** a stock Adjustment.

A stock Adjustment can only be edited when in the **New** status.

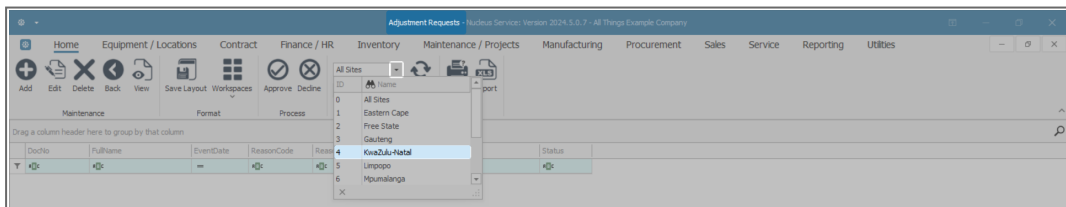
Ribbon Select Inventory > Adjustments



- The **Adjustment Requests** listing screen will be displayed.

SELECT THE SITE AND STATUS

- Select the **Site**.
 - In this image, **KwaZulu-Natal** has been selected.



- The **State** filter will default to '**New**' upon opening, this must not need be changed.

Note: Adjustment requests can only be edited in the **New** status.

DocNo	FullName	EventDate	ReasonCode	ReasonCodeDesc	Comments	Status
KAR0000002	Eden Rowan	13 Jun 2024	ADJUST	Stock Adjustment		N
KAR0000004	Eden Rowan	13 Jun 2024	ADJUST	Stock Adjustment		N
KAR0000005	Eden Rowan	13 Jun 2024	ADJUST	Stock Adjustment		N
KAR0000006	Eden Rowan	09 Jul 2024	LOAD	Stock Load	Damaged Stock MHU131001.	N
KAR0000009	Eden Rowan	09 Jul 2024	LOAD	Stock Load	Adjust AB-Class Items.	N
KAR0000010	Eden Rowan	12 Jul 2024	LOAD	Stock Load	Buildup MHU131004.	N
KAR0000011	Eden Rowan	12 Jul 2024	LOAD	Stock Load	Part Knock Down MHU131005	N

SELECT ADJUSTMENT REQUEST

- Select the **row** of the **adjustment request** that you wish to **Edit**.
- Click on **Edit**.

DocNo	FullName	EventDate	ReasonCode	ReasonCodeDesc	Comments	Status
KAR0000002	Eden Rowan	13 Jun 2024	ADJUST	Stock Adjustment		N
KAR0000004	Eden Rowan	13 Jun 2024	ADJUST	Stock Adjustment		N
KAR0000005	Eden Rowan	13 Jun 2024	ADJUST	Stock Adjustment		N
KAR0000006	Eden Rowan	09 Jul 2024	LOAD	Stock Load	Damaged Stock MHU131001.	N
KAR0000009	Eden Rowan	09 Jul 2024	LOAD	Stock Load	Adjust AB-Class Items.	N
KAR0000010	Eden Rowan	12 Jul 2024	LOAD	Stock Load	Buildup MHU131004.	N
KAR0000011	Eden Rowan	12 Jul 2024	LOAD	Stock Load	Part Knock Down MHU131005	N

- The **Maintenance for Adjustment Request []** screen will open.

Maintenance for Adjustment Request KAR0000011 - Nucleus Service: Version 2024.5.0.7 - All Things Example Company

Reason Code: Stock Load
 Requestor: Eden Rowan
 Contra Account: []
 Request Date: 12 Jul 2024 10:28:44

Comments: Part Knock Down MHU131005

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	BatchSerialNo	UnitCost	QtySOH	Quantity	LineCost	ContraAccCode
STA4AD803	STA4 Architects Drawing Book 03	C	KZ - Main	KZ - Receiving Bin	STA4AD802-110724005	300.00	5.00	4.00	-300.00	2500
STA4ACS	ST A4 Clear Plastic Cover	C	KZ - Main	K201-001	STA4ACP0001-A4	50.00	7.00	8.00	50.00	2500
STA4ACD	STA4 Cardboard Bedding	C	KZ - Main	K201-001	STA4ACD002-A4	50.00	3.00	4.00	50.00	2500
STA4AP	STA4 Note Paper	C	KZ - Main	K201-001	STA4ATP-0003-A4	100.00	3.00	5.00	200.00	2500

Total: 0.00

EDIT ADJUSTMENT REQUEST DETAILS

- **Reason Code:** This will open as a Stock Adjustment or Stock Load, as previously selected.
- **Requestor:** You can click on the drop-down arrow and select from the list, an alternative person if required.
- **Contra Account:** In the **Edit** screen, you will need to re-select the Contra Account code by clicking on the search icon. Select from the **Select a contra account for this adjustment** pop up screen, the account you wish to link this adjustment to.
- **Request Date and Time:**
 - **Date:** You can either type in or click on the drop-down arrow and use the calendar function to change the date.
 - **Time:** You can either type in or use the directional arrows to change the time.
- **Comments:** Highlight existing text and press delete and **type in** a new Comment, or **Edit** the existing comment.
 - In this example, the **Contra Account** code has been selected and the **Comments** edited.

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	BatchSerialNo	UnitCost	QtySOH	Quantity	LineCost	ContraAccCode
STA40B03	STA4 Architects Drawing Book 03	C	K2 - Main	K2 - Receiving Bin	STA4ACB02-110724005	300.00	5.00	4.00	-300.00	2500
STA4CS	STA44 Clear Plastic Cover	C	K2 - Main	K201-001	STA4CP0001-144	50.00	7.00	8.00	50.00	2500
STA4CB	STA44 Cardboard Backing	C	K2 - Main	K201-001	STA4CB-0002-144	50.00	3.00	4.00	50.00	2500
STA4WP	STA44 Note Paper	C	K2 - Main	K201-001	STA4WP-0003-144	100.00	3.00	5.00	200.00	2500

EDIT PARTS DATA GRID

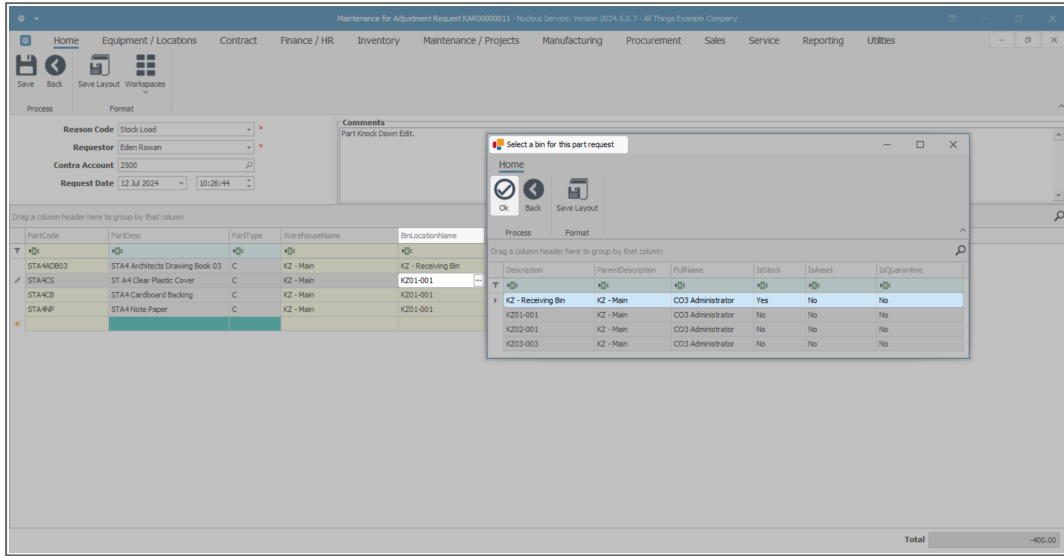
You can edit the **PartCode**, **WarehouseName**, **BinName**, **BatchSerialNo**, **Quantity**, **ContraAccountCode** per item line, as required.

- Select the **row** of the **item** that you wish to **edit**.
 - In this image, **STA4CS - A4 Clear Plastic Cover** has been selected to edit the **BinName** and **BatchSerialNo**.

Follow this process to select an alternative **Bin Location Name**:

- Click in the **Bin Location Name** text box to reveal an **ellipsis** button.
- Click on this button.
- The **Select a bin for this part request** screen will pop up. This screen will contain details of the **bins** that you can choose from within this warehouse.
- Select the row of the alternative **bin** location you wish to adjust this item out of.

- In this image, **KZ01-001** has been selected.
- Click on **Ok**.



Note: If there is only **1** bin linked to the warehouse, as you click on the ellipsis button, the **Bin Location Name** text box will populate with that one particular bin name and the **'Select...'** screen will not pop up.

Once the bin location field is populated, Nucleus Service will select the item from the first batch in this bin location. If this first batch is 'un-numbered' then this field will be blank.

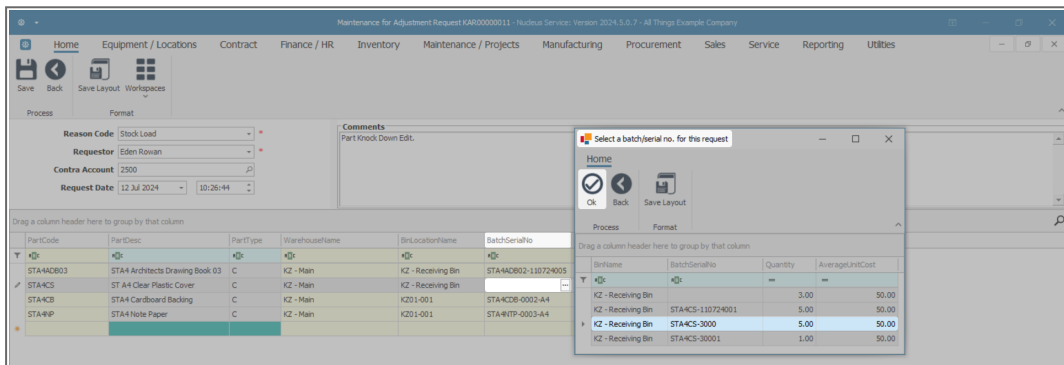
Follow this process to select a **Batch/Serial Number**:

- Click in the **BatchSerialNo** text box.
- An **ellipsis** button will be revealed.
- Click on this button.
- The **Select a batch//serial no. for this request** screen will pop up.
- Select the **row** of the **batch/serial number** that you wish to adjust this item out of (if you are using **Stock Batch Tracking**).
- Click on **Ok**.

If this is an **A-Class** or **B-Class** item that is being adjusted out of store then this becomes the **Serial No** column for A/B-Class items - so search for the correct serial number if this is a serialised item.

If this a **C-Class** item being adjusted out of store, and you are using **Stock Batch Tracking**, then you will need to select the correct batch that you wish to adjust the **C-Class** item out of.

If you are not using Stock Batch Tracking, then the **BatchSerialNo** text box can remain blank.



- The **Bin Location** and **BatchSerialNo** details have been changed.
- the **Unit Cost**, **QtySOH**, and **Line Cost** fields have auto adjusted to take this into account.
- The **Quantity** reverts to [0] and will have to be edited.

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	BatchSerialNo	UnitCost	QtySOH	Quantity	LineCost	ContraAccCode
STA4AD603	STA4 Architects Drawing Book 03	C	K2 - Main	K2 - Receiving Bin	STA4ACB02-110724005	300.00	5.00	4.00	-300.00	2500
STA4CS	ST A4 Clear Plastic Cover	C	K2 - Main	K2 - Receiving Bin	STA4CS-3000	50.00	5.00	0.00	-250.00	2500
STA4CB	STA4 Cardboard Backing	C	K2 - Main	K201-001	STA4CB-0002-A4	50.00	3.00	4.00	50.00	2500
STA4WP	STA4 Note Paper	C	K2 - Main	K201-001	STA4WP-0003-A4	100.00	3.00	5.00	200.00	2500
Total										-300.00

EDIT QUANTITY

- In this Adjustment Request, we are **'knocking down'** one whole unit, (A4 Architects Drawing Book), and adjusting the **unit parts** (e.g. A4 Clear Plastic Covers, A4 Cardboard Backing, A4 Note-paper) **into** stock. Therefore the (end) **Quantity** amount for this edited part must be changed.
- Click in the **Quantity** field.

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	BatchSerialNo	UnitCost	QtySOH	Quantity	LineCost	ContraAccCode
STA4AD603	STA4 Architects Drawing Book 03	C	K2 - Main	K2 - Receiving Bin	STA4ACB02-110724005	300.00	5.00	4.00	-300.00	2500
STA4CS	ST A4 Clear Plastic Cover	C	K2 - Main	K2 - Receiving Bin	STA4CS-3000	50.00	5.00	<input type="text" value="0.00"/>	-250.00	2500
STA4CB	STA4 Cardboard Backing	C	K2 - Main	K201-001	STA4CB-0002-A4	50.00	3.00	4.00	50.00	2500
STA4WP	STA4 Note Paper	C	K2 - Main	K201-001	STA4WP-0003-A4	100.00	3.00	5.00	200.00	2500
Total										-300.00

- Either **type** in or use the **directional arrows** to select the end quantity **after** the adjustment.
 - In this example, the sum will be: Quantity Stock on Hand (**5**) + the adjusted **in** quantity (**1**) = the total end quantity in stock (**6**).
- As the Quantity is entered, the **Line Cost** will adjust accordingly, it will now be a **plus** + amount.

PartCode	PartDesc	PartType	WarehouseName	BinLocationName	BalIdentifierNo	UnitCost	QtySOH	Quantity	LineCost	ContraAccCode
STA4M003	STA4 Architects Drawing Book 03	C	K2 - Main	K2 - Receiving Bin	STA4M003-11072405	300.00	5.00	-4.00	-300.00	2500
STA4CS	STA4 Clear Plastic Cover	C	K2 - Main	K2 - Receiving Bin	STA4CS-000	50.00	5.00	6.00	50.00	2500
STA4CB	STA4 Cardboard Backing	C	K2 - Main	K201-001	STA4CB-0002-44	50.00	3.00	4.00	50.00	2500
STA4P	STA4 Note Paper	C	K2 - Main	K201-001	STA4P-0003-44	100.00	3.00	5.00	200.00	2500
Total										0.00

- When you have finished editing the Adjustment Request, click on **Save**.

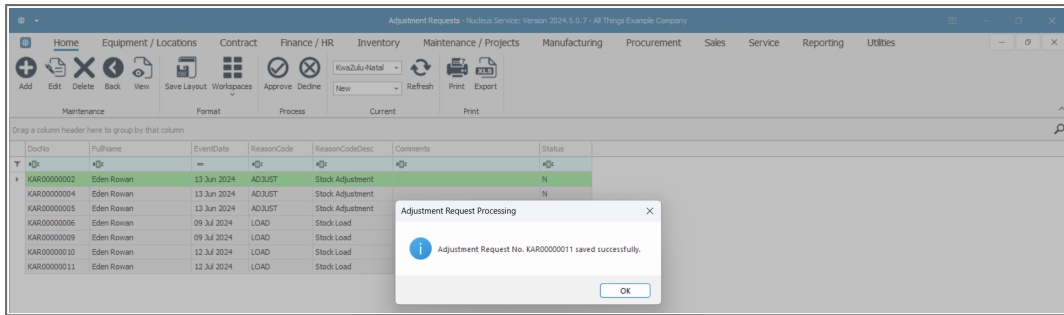
PartCode	PartDesc	PartType	WarehouseName	BinLocationName	BatchSerialNo	UnitCost	QtySOH	Quantity	LineCost	ContraAccCode
STA4ACB03	STA4 Architects Drawing Book 03	C	KZ - Main	KZ - Receiving Bin	STA4ACB02-110724005	300.00	5.00	4.00	-300.00	2500
STA4ACS	STA4 Clear Plastic Cover	C	KZ - Main	KZ - Receiving Bin	STA4ACS-3000	50.00	5.00	6.00	50.00	2500
STA4ACB	STA4 Cardboard Backing	C	KZ - Main	K201-001	STA4ACB-0002-44	50.00	3.00	4.00	50.00	2500
STA4AP	STA4 Note Paper	C	KZ - Main	K201-001	STA4AP-0003-44	100.00	3.00	5.00	200.00	2500

Total: 0.00

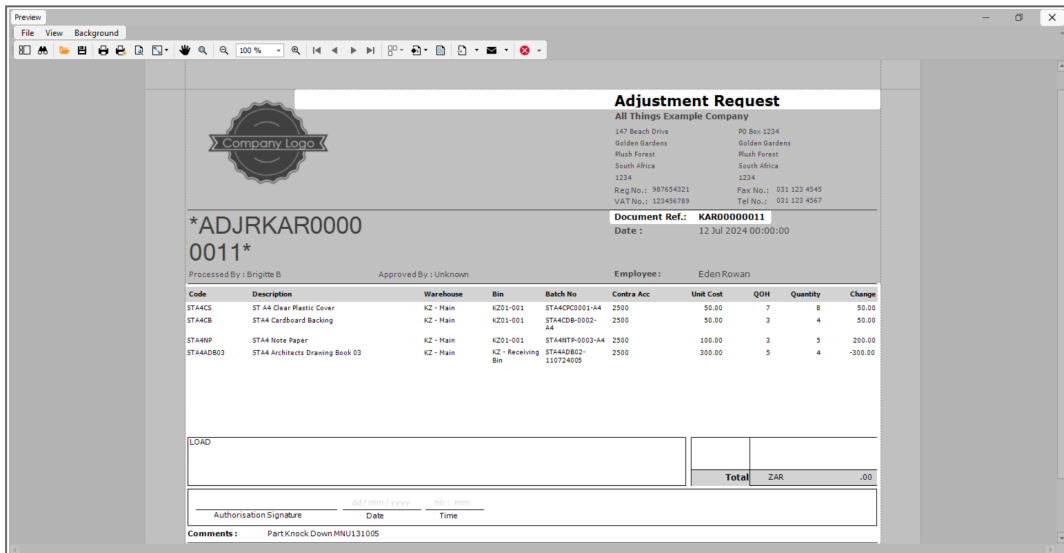
PRINT ADJUSTMENT REQUEST

- A **Report Generation** message box will pop up asking -
 - **Do you want to print the adjustment request []?**
- Click on **Yes**.

- You will return to the **Adjustment Requests** listing screen.
- An **Adjustment Request Processing** message box will pop up informing you that -
 - **Adjustment Request No. [] saved successfully.**
- Click on **OK**.



- The Adjustment Request **Report Preview** screen will now be displayed.
- From here you can **View, Print, Export** or **Email** the edited Adjustment Request report.
- **Close** the Report Preview screen when you are done.



Related Topics

- [Adjustments - Adjust Out](#)
- [Adjustments - Adjust In](#)
- [Adjustments - Authorise](#)
- [Adjustments - Part BuildUp](#)
- [Adjustments - Part KnockDown](#)
- [Adjustments - Edit](#)

- [Adjustments - Delete](#)
- [Adjustments - View](#)
- [Adjustments - Reject](#)
- [Adjustments - Print](#)

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