



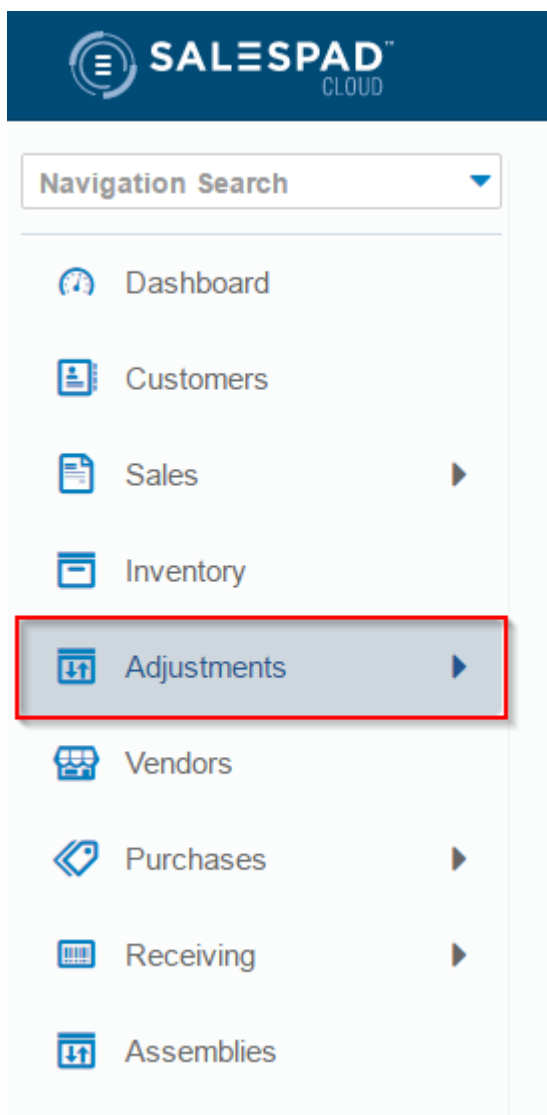
Adjustments

Megan De Freitas - 2025-06-10 - Modules

Overview

SalesPad Cloud's Adjustments module allows you to adjust inventory in and out and lets you transfer inventory between warehouses and/or bins. You must post an inventory transaction in, out, or as a transfer in order to make your inventory live.

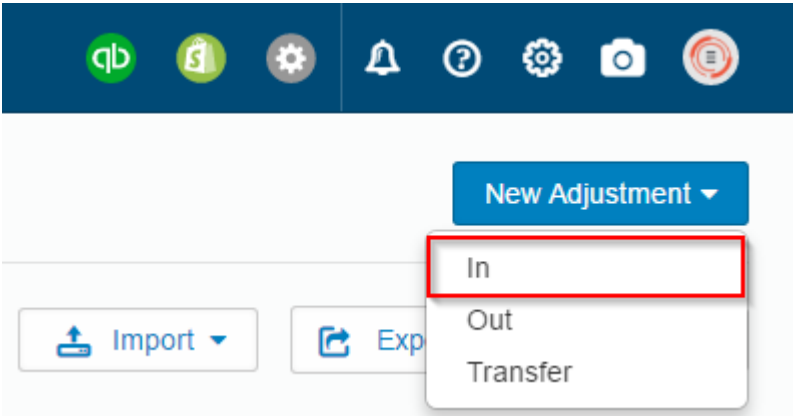
To get started, click **Adjustments** on the left-hand side of the screen.



Adjust Inventory In or Out

Adjust Inventory In

To adjust inventory in, first select In from the **New Adjustment** dropdown in the upper right-hand corner of the screen.



The transaction card will open. Fill in the information fields.

A screenshot of the transaction card form. At the top, it shows 'IVT0000000067 (Transaction In)' with buttons for 'Void', 'Post', and 'More'. The form has several fields: 'Description' with 'New Inbound', 'Status' with 'Open', 'Date' with '6/9/2016', 'Workflow Batch' with 'Determine Validity', 'To Location Address' with 'East Warehouse', and a detailed address field: '5678 Lincoln Grand Rapids, MI, 49525 USA'.

Add lines to your transaction.

A screenshot of the 'Line Items' tab in the transaction card. It shows a table with columns: Item Number, Item Description, Qty, To Bin, UoM, Unit Cost, and Inv Transaction Type. There are two line items: one for 'Lamp Shade' (Qty 10, To Bin A1, Unit Cost 7.00) and one for 'Lamp Base' (Qty 10, To Bin A1, Unit Cost 3.00). Above the table are buttons for 'New Line' and 'Delete Lines'. There are also tabs for 'Line Items', 'Audits', and 'Notes'.

To review how to add line items to a transaction, click [here](#).

Note: If you are working with a serialized inventory item, check the Serial Lot Auto option in the grid to automatically assign a serial number vs. manually assigning one. Do not select Serial Lot Auto for non-serialized items.

A screenshot of a grid showing transaction details. The grid has columns: 'Inv Transaction Type', 'Serial Lot Auto', 'Serial Lot Num', and 'Extended Cost'. There are three rows. The first two rows have 'In' for the transaction type and empty checkboxes for 'Serial Lot Auto'. The third row has 'In' for the transaction type, a checked checkbox for 'Serial Lot Auto', a serial number '20160609_0000000008', and an extended cost of '200.00'. The 'Serial Lot Auto' column is highlighted with a red rectangular border.

Remember, if a column you want to view is not visible on your grid, click the **Columns** button on the right-hand side of the screen and select the columns you wish to view.

To Location Address

East Warehouse

5678 Lincoln
Grand Rapids, MI, 49525
USA

Export Columns

Post your adjustment in by clicking the **Post Document** button in the upper right-hand corner.

qb

Void Post Document More Actions

Select your post date in the Post Inventory Transaction window that pops up and click **Post** to complete the transaction and update your inventory accordingly.

Post Inventory Transaction

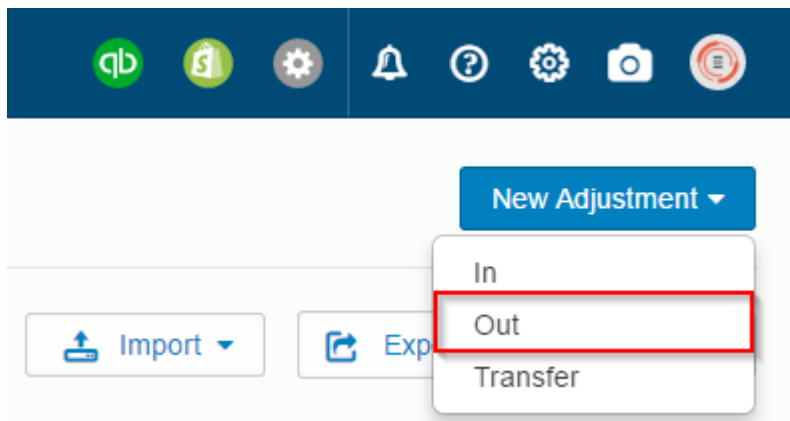
Post Date

6/9/2016

No Post

Adjust Inventory Out

To adjust inventory out, follow the same steps you took to adjust inventory in, but select Out from the **New Adjustment** dropdown.



Note: Unit cost can be edited on adjustments in, but for adjustments out, unit cost will default to current cost and cannot be edited.

When adjusting out serial or lot tracked items, you can choose the specific items you want to adjust out. When you add a serial or lot tracked line item to the adjustment, the Serial/Lot Bulk Picker drawer will appear. Click the **up arrows** next to the items you wish to adjust out from the Available field and click **Add Lines** when you are finished.

Serial / Lot Bulk Picker



Item Number

PN203

Uofm

Each

From Location Address

MAIN

Serial / Lot Type:

Serial

Lines to Add (0)

Columns

Serial Lot Num	Bin	Qty Picked	Remove All
No Results Found			

Available



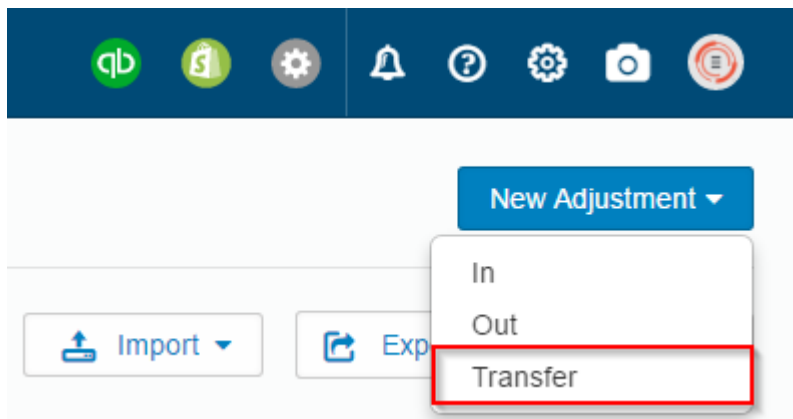
Columns

Serial Lot Num	Bin	Qty Available	Fulfill Qty	Add All
3		1		
4		1		
1		1		
2		1		

Add Lines

Transfer Inventory

To perform an inventory transfer, select Transfer from the **New Adjustment** dropdown.



Fill out the information fields, including both the To Location and From Location Address fields.

IVT0000000073 (Transfer) [Void] [Post] [More] [X]

Description: Restock Office

Status: Open Date: 6/9/2016

Workflow Batch: No Workflow Batch

From Location Address: East Warehouse

To Location Address: Office

5678 Lincoln Grand Rapids, MI, 49525 USA

www.salespad.net
brian.dodge@salespad.net
(616)123-3456

Add line items. Don't forget to adjust the From Bin and To Bin columns if needed.

Line Items Audits Notes

New Line Add Serial/Lot Delete Lines

Item Number	Item Description	Qty	UoM	Unit Cost	Inv Transaction Type	From Bin	To Bin	Serial Lot Auto
6882	Screen Wipes	50	Each	0.00	Transfer	A1		<input type="checkbox"/>

Post the transfer in the same way you posted adjustments in and out.

Note: Just like for adjustments out, unit cost will default to current cost and cannot be edited.

Search for a Transaction

Once you've opened the Adjustments module, you will see a grid displaying your existing transactions.

Adjustments

Find a Transaction [X] [Refresh] [Hide Posted Transaction] [Hide Voided Transaction]

Transaction #	Type	Date	Status	Changed On	Created On
IVT0000000015	In	6/8/2016	Open	6/8/2016	06/08/2016
IVT0000000016	Transfer	6/8/2016	Open	6/8/2016	06/08/2016
IVT0000000018	Transfer	6/16/2016	Open	6/16/2016	06/16/2016

There are several ways to search for a transaction. Before you begin your search, though, decide whether or not you want posted or voided transactions to be displayed in your

search results. Check the boxes just to the right of the search bar accordingly.

Adjustments

Find a Transaction

☒ Hide Posted Transaction

☒ Hide Voided Transaction

<input type="checkbox"/>	Transaction #	Type	Date	Status	Changed On	Created On
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To search for a specific adjustment by number, simply type the number (or partial number, if you don't know the exact number) into the search bar located just above your grid.

Find a Transaction

<input type="checkbox"/>	Transaction #	Type	Date	Status	Changed On
<input type="checkbox"/>	IVT0000000015	In	6/8/2016	Open	6/8/2016

You can also search each column in your grid. To reveal the auto filter row for your columns, click the gray **ellipses** found just below the column headers.

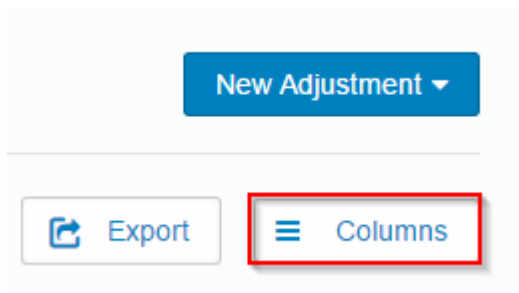
To Location
Warehouse 10

Clicking the gray ellipses will reveal the auto filter row

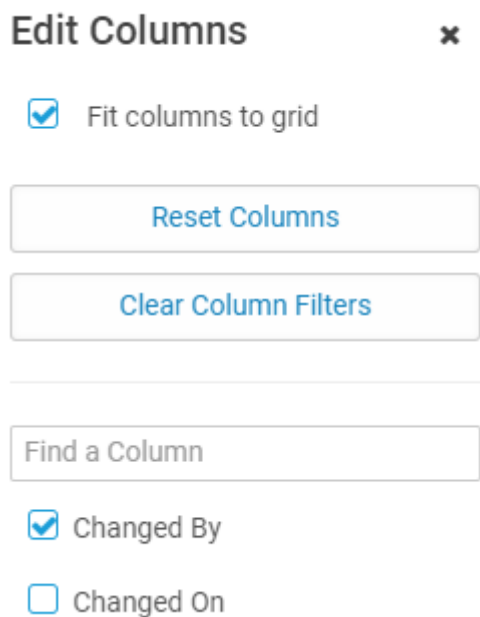
Enter your search criteria into whichever auto filter row is most useful for your particular search.

Certain adjustments columns, such as Created On, also offer dropdown options in the auto filter row.

If the column you'd like to search is not visible in your grid, click the **Columns** button in the upper right-hand side of the screen.



Clicking this button reveals the Edit Columns drawer. Check the boxes for columns you want visible and uncheck the boxes for those you'd rather not see.



The **Reset Columns** button in the Edit Columns drawer will restore your grid to its default view, and the **Clear Column Filters** button will clear any search criteria you have currently entered into the auto filter row.



Printing Labels and Emailing Transactions

PRINTING A LABEL

To print labels for the inventory items involved in an adjustment or transfer, open the adjustment or transfer and click the **Printer** icon near the transaction header.

IVT0000000078

(Transaction In)

Description

Brushes Restock

Status

Open

Date

6/9/2016

Note: To print labels only for certain items on the adjustment or transfer, check the boxes next to those items before clicking the Printer icon.

Line Items

Audits

Notes

New Line

Delete Lines

	Item Number	Item Description
<input type="checkbox"/>	Large Brush	largest brush
<input checked="" type="checkbox"/>	Medium Brush	medium brush

This brings up the Print Label screen. Check the box next to Default Inventory Transaction Label, or click the + button to design your own label.

Print IVT0000000015 (Transaction In) for 1 lines

Switch to Email

Print Preview

Report Options

☒ Include Company Information
☒ Include All Pricing

Reports Available

☒ Default Inventory Transaction Label

10 Speed - 0mg.
100ml

\$10.00

There are invalid characters in the text

Note: See our [Report Designer](#) documentation for more information on designing labels. Choose the Inventory Transaction Line Report Type when designing a new label.


You can edit the label template by clicking the **pencil** button.

Reports Available

+

Find a report

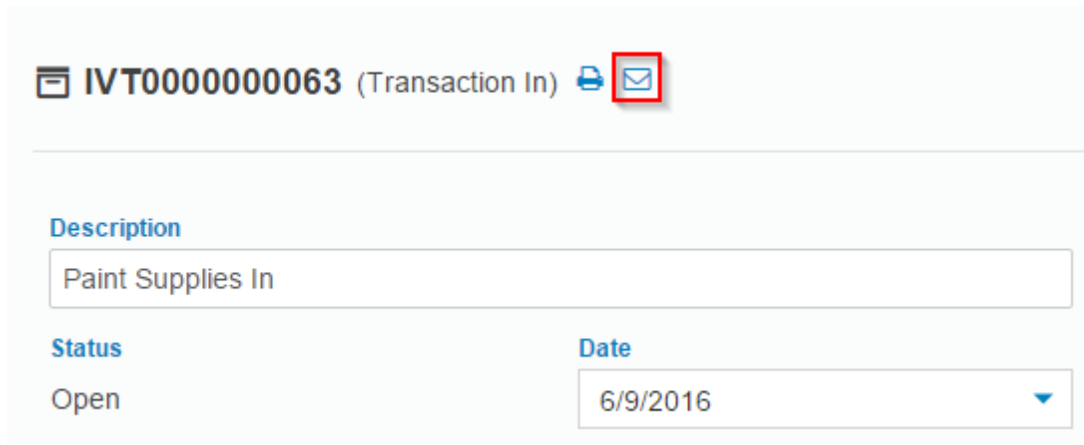
☒ Default Inventory Transaction Label





Once you've selected the labels you want to print, click **Print** in the bottom right-hand corner of the screen.

EMAILING A Transaction

To email a copy of the inventory transaction, click the **Email** button next to the transaction header.



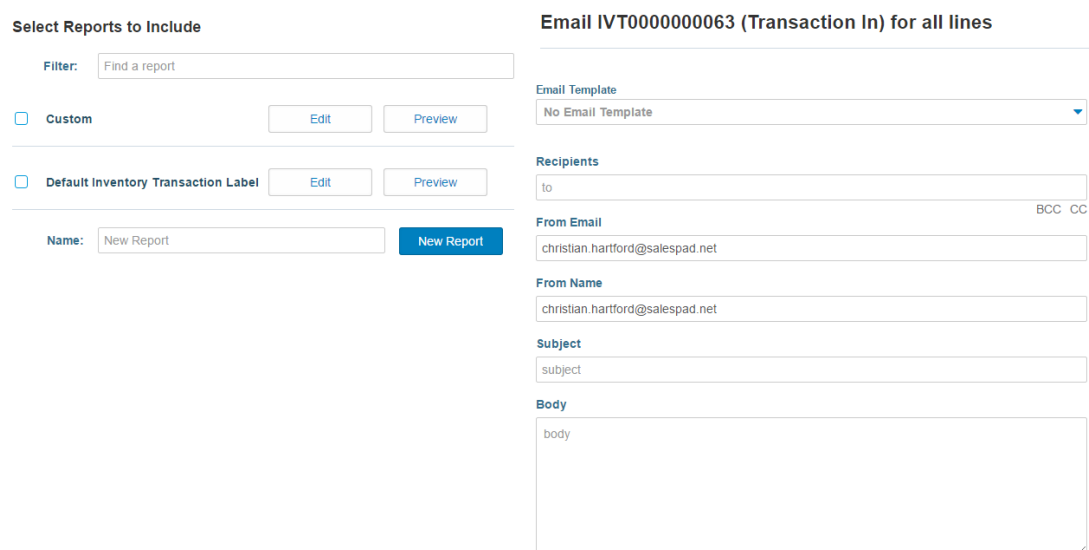
IVT0000000063 (Transaction In) 

Description

Paint Supplies In

Status Open **Date** 6/9/2016

This brings up the Email Transaction screen. From here you can select a report to send, choose a template to base your email off of, and enter the content and contact information for your email.



Select Reports to Include

Filter:

☐ Custom

☐ Default Inventory Transaction Label

Name:

Email IVT0000000063 (Transaction In) for all lines

Email Template:

Recipients

to:

BCC CC

From Email

From Name

Subject

Body

When you've filled in the necessary information, click **Send Email** in the bottom right-hand corner of the screen to send the email.

INVENTORY TRANSACTIONS

SalesPad Cloud allows users to adjust inventory quantities either in or out of the system

using inventory adjustments. Once posted, these adjustments will be synced over to QuickBooks Online as journal entries, either debiting or crediting the inventory asset account and then using a SalesPad Cloud inventory variance account to balance the journal entry.