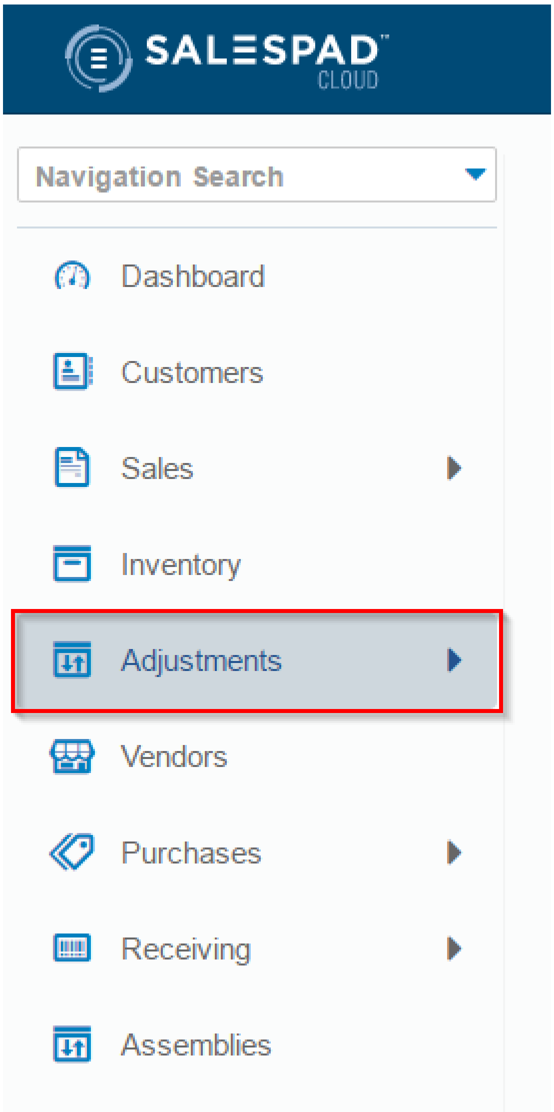
Adjustments

Megan De Freitas - 2025-08-06 - 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.

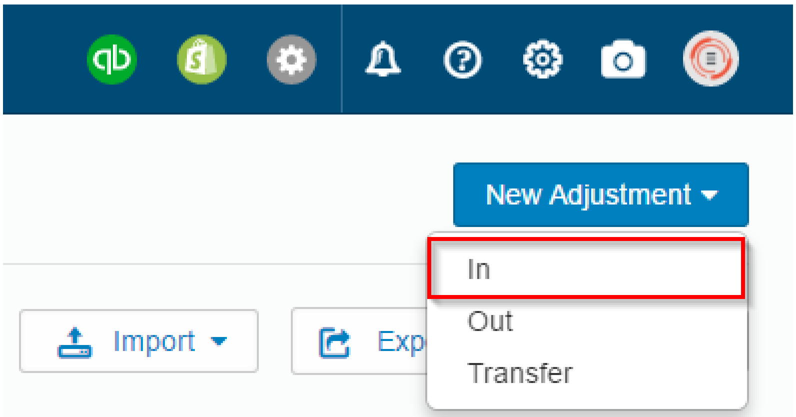
To get started, click **Adjustments** on the left-hand side of the screen.



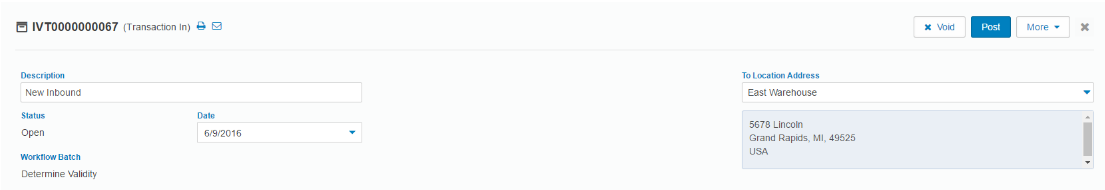
Adjust Inventory In or Out

Adjust Inventory In

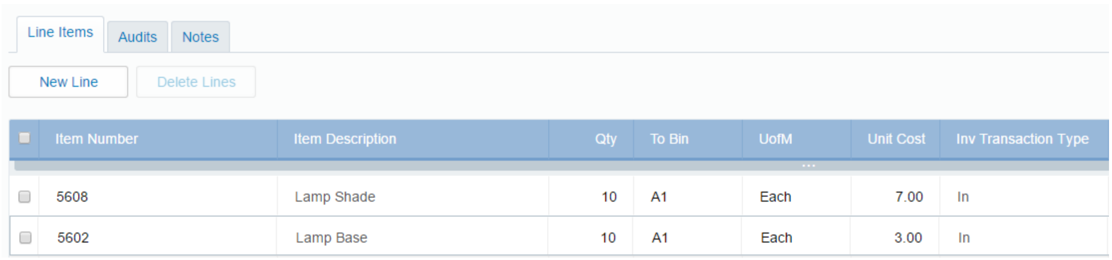
To adjust inventory in, first select In from the **New Adjustment** dropdown in the upper right-hand corner of the screen.



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

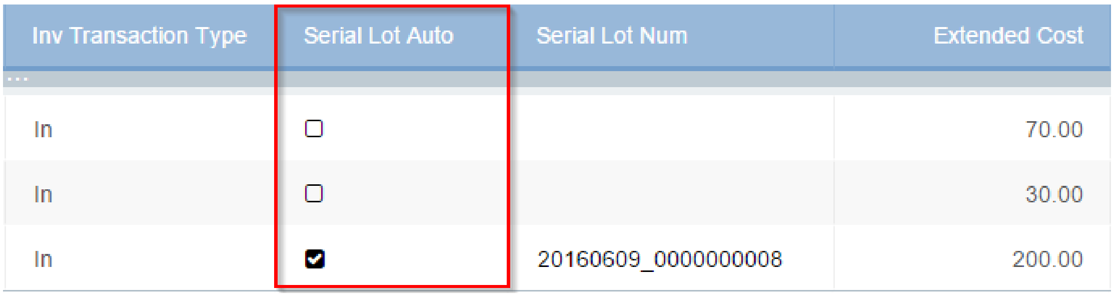


Add lines to your transaction.

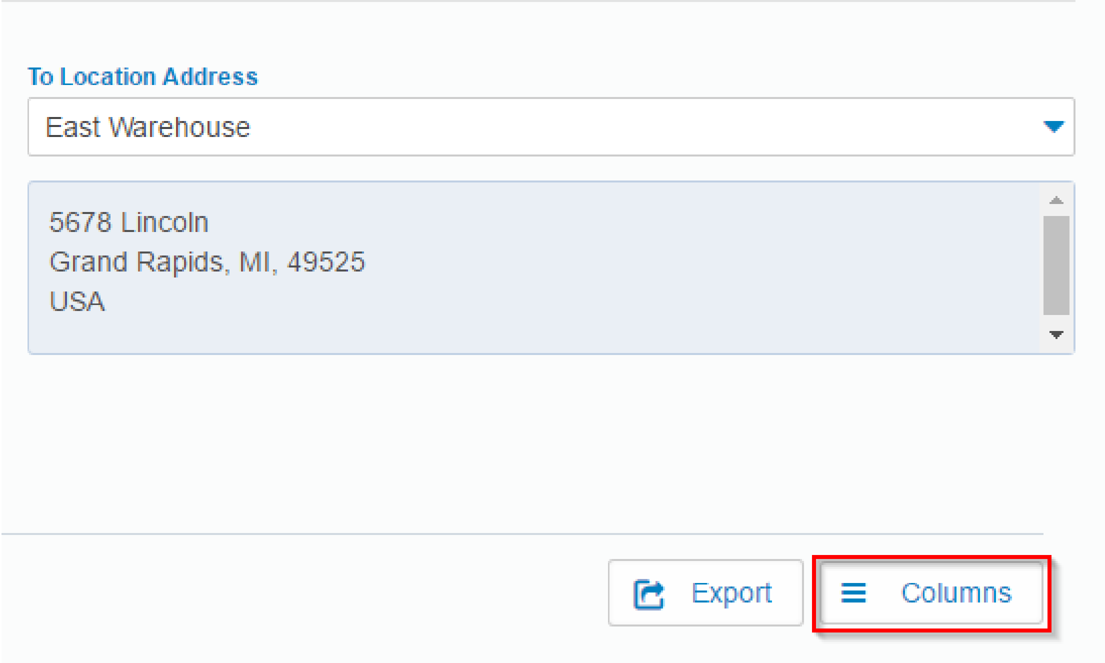


To review how to add line items to a transaction, click [here](#).

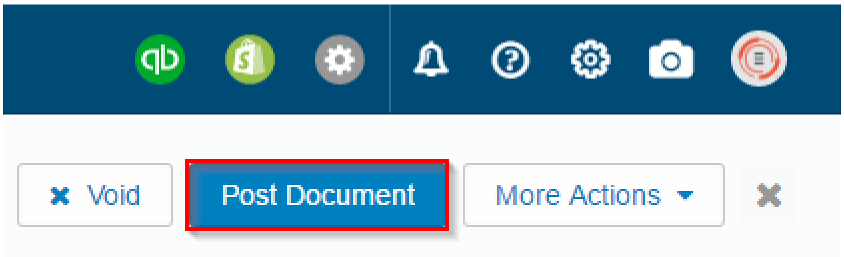
Note: If you are working with a serialized inventory item, check the Serial Lot Auto option in the grid to automatically assign a serial number vs. manually assigning one. Do not select Serial Lot Auto for non-serialized items.



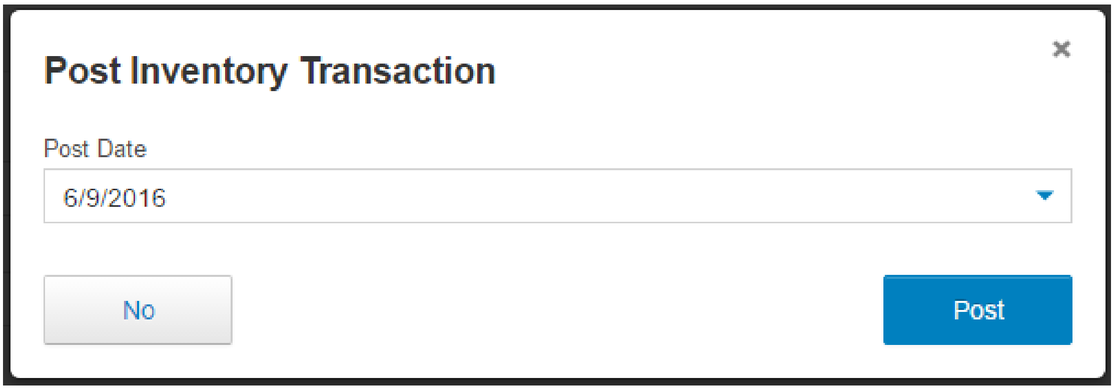
Remember, if a column you want to view is not visible on your grid, click the **Columns** button on the right-hand side of the screen and select the columns you wish to view.



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

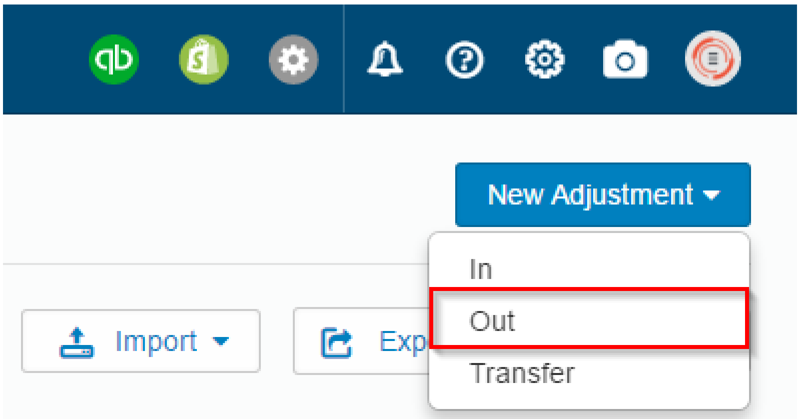


Select your post date in the Post Inventory Transaction window that pops up and click **Post** to complete the transaction and update your inventory accordingly.



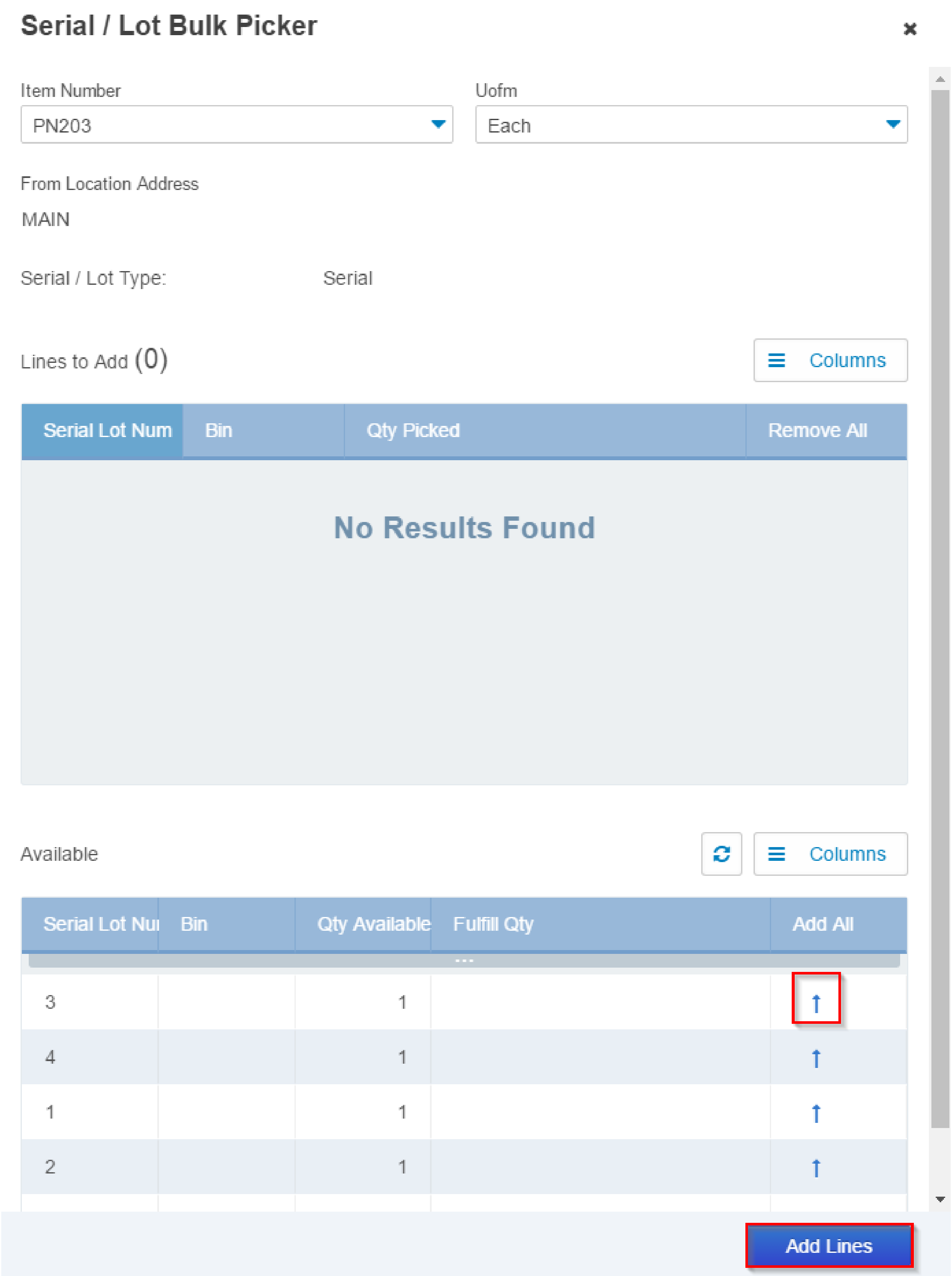
Adjust Inventory Out

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



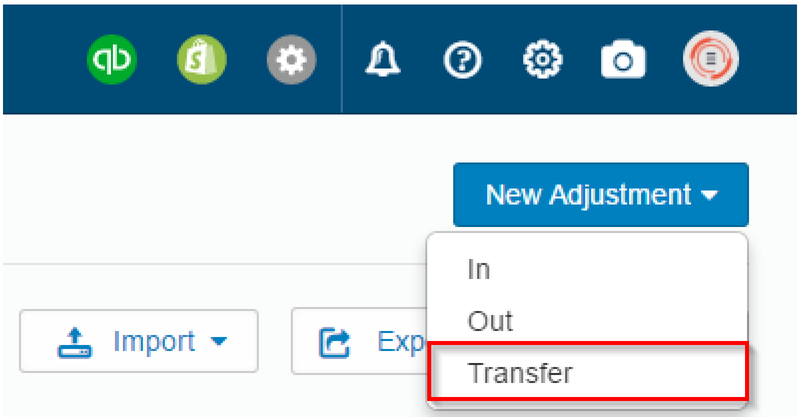
Note: Unit cost can be edited on adjustments in, but for adjustments out, unit cost will default to current cost and cannot be edited.

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.

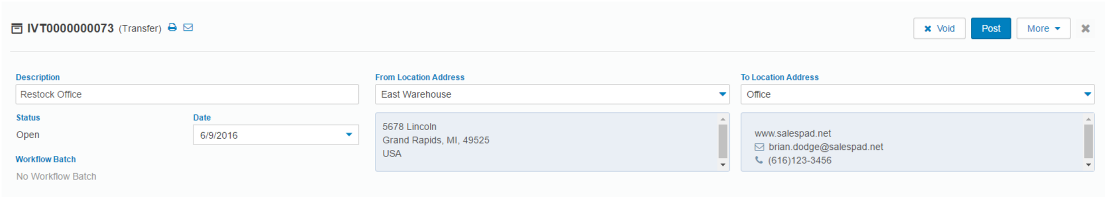


Transfer Inventory

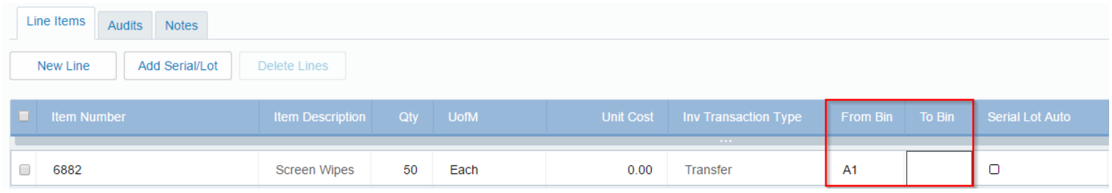
To perform an inventory transfer, select Transfer from the **New Adjustment** dropdown.



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



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

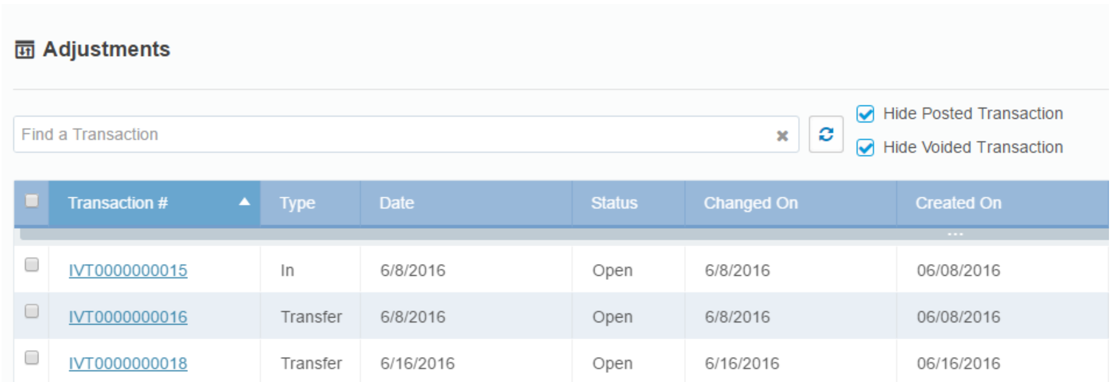


Post the transfer in the same way you posted adjustments in and out.

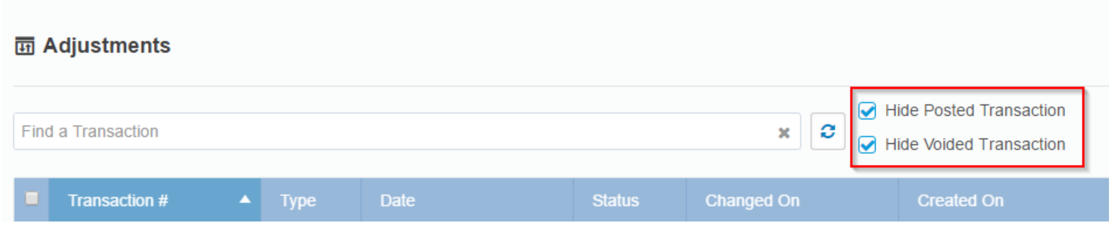
Note: Just like for adjustments out, unit cost will default to current cost and cannot be edited.

Search for a Transaction

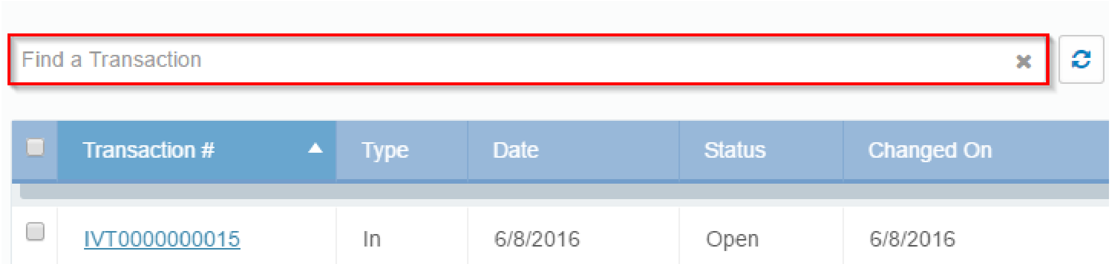
Once you’ve opened the Adjustments module, you will see a grid displaying your existing transactions.



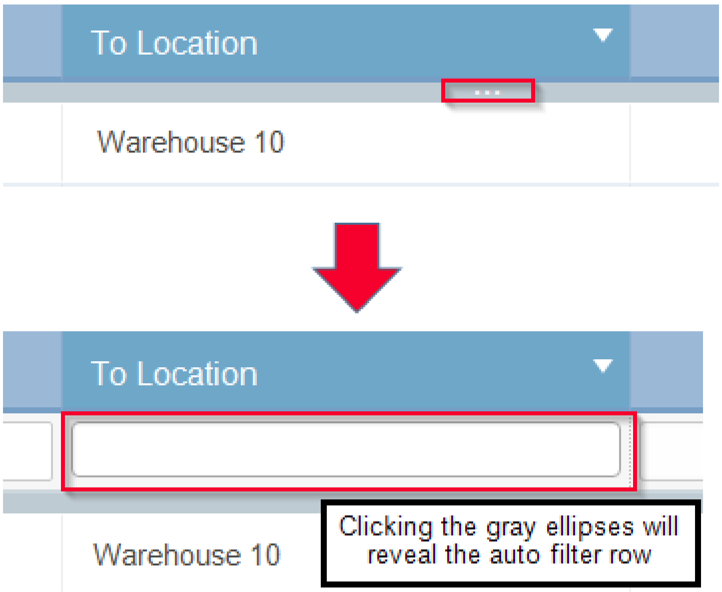
There are several ways to search for a transaction. Before you begin your search, though, decide whether or not you want posted or voided transactions to be displayed in your search results. Check the boxes just to the right of the search bar accordingly.



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.



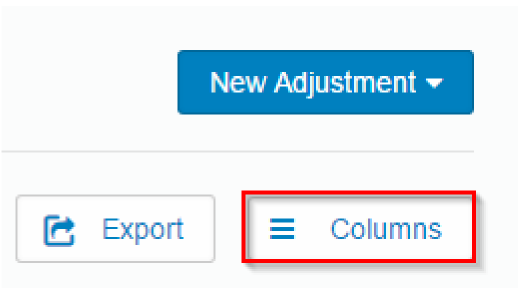
You can also search each column in your grid. To reveal the auto filter row for your columns, click the gray **ellipses** found just below the column headers.



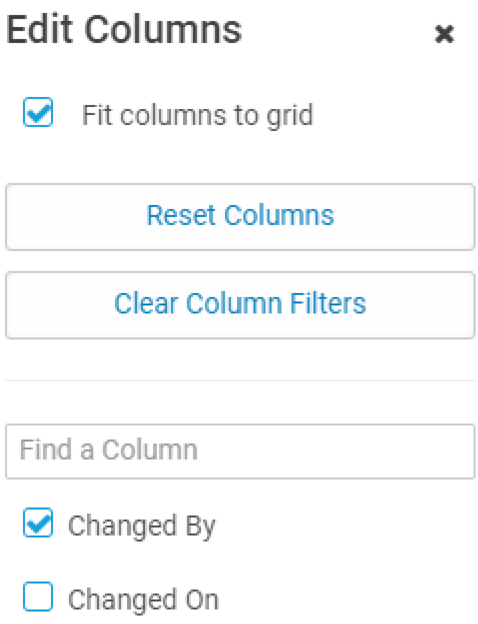
Enter your search criteria into whichever auto filter row is most useful for your particular search.

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.

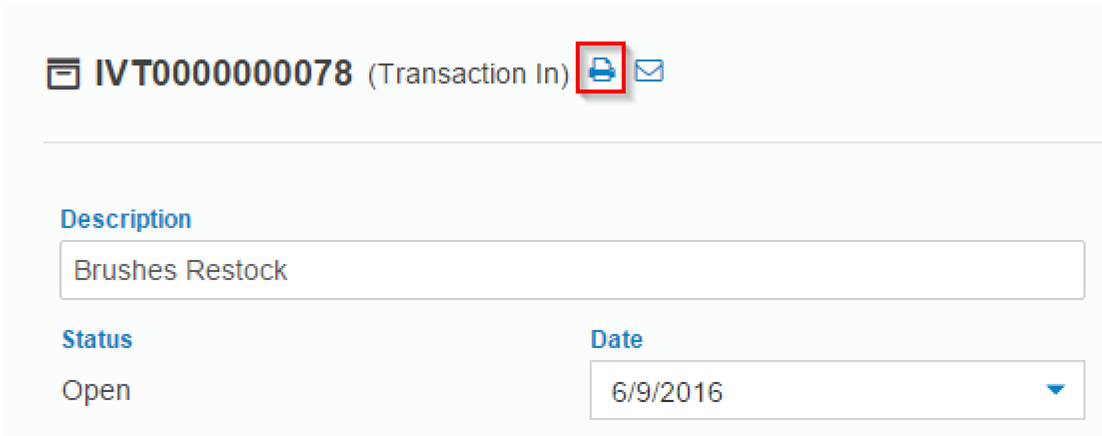


The **Reset Columns** button in the Edit Columns drawer will restore your grid to its default view, and the **Clear Column Filters** button will clear any search criteria you have currently entered into the auto filter row.

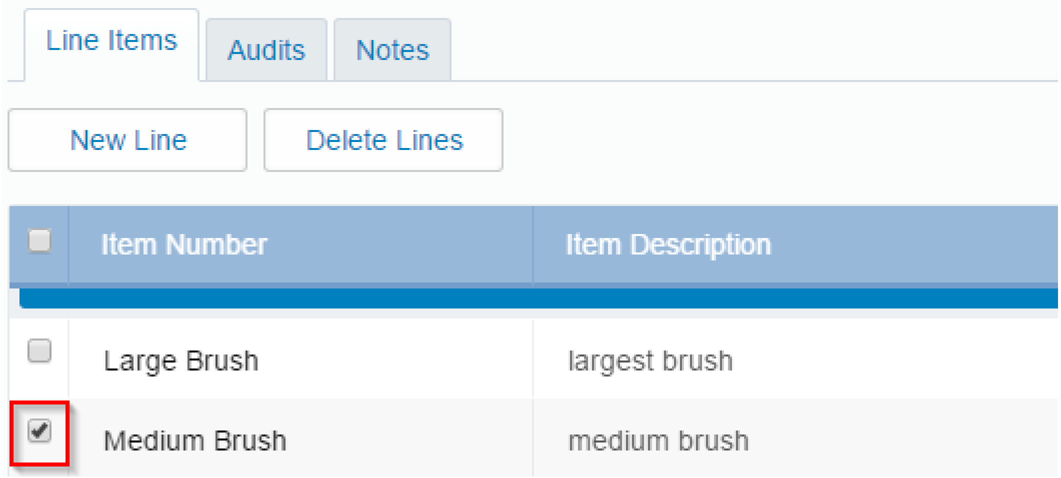
Printing Labels and Emailing Transactions

PRINTING A LABEL

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



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.



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.

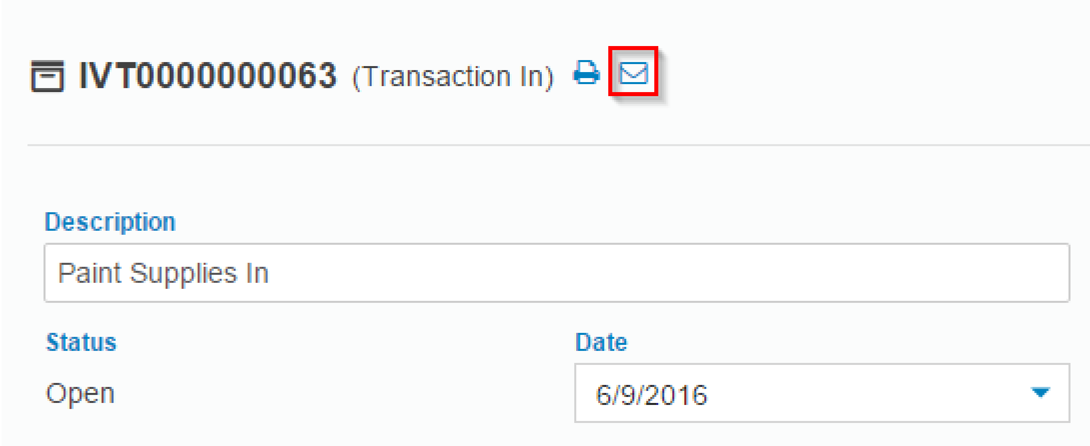
Note: See our [Report Designer]() documentation for more information on designing labels. Choose the Inventory Transaction Line Report Type when designing a new label.

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

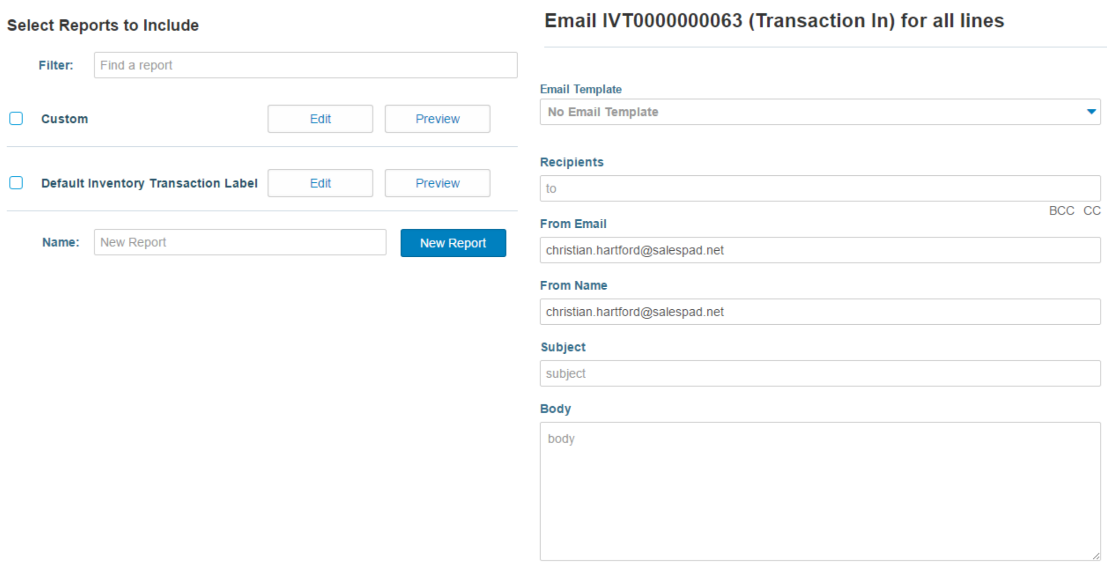
Once you've selected the labels you want to print, click **Print** in the bottom right-hand corner of the screen.

EMAILING A Transaction

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



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.



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.