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Inventory Adjustment

Cavallo Support - 2025-06-11 - [Inventory](#)

Overview

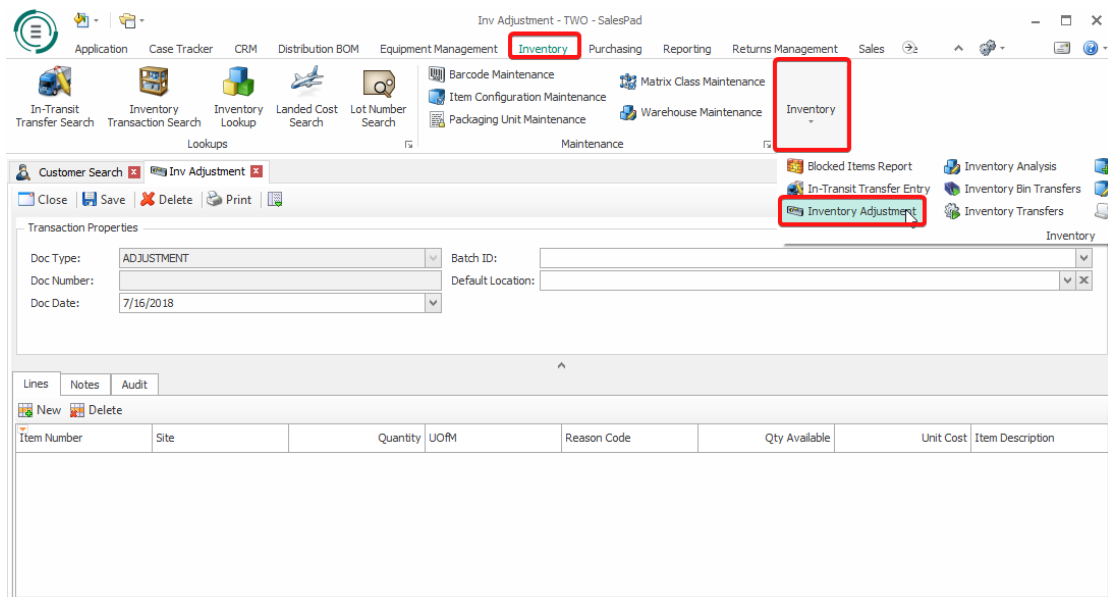
Inventory Adjustment allows users to adjust quantities for inventory items. These adjustments create adjustment documents in GP that must be posted in order to take effect. In this document, you will learn how to set the properties for an inventory adjustment, how to add and delete lines to the document, and how to create and edit notes for the document.

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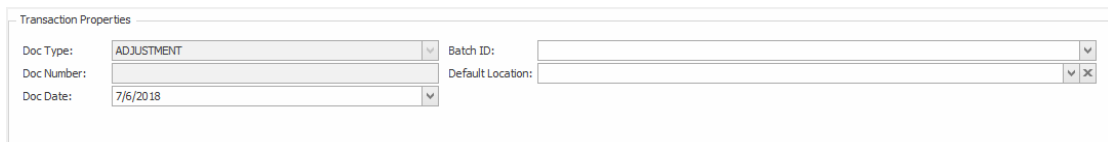
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Inventory Adjustment

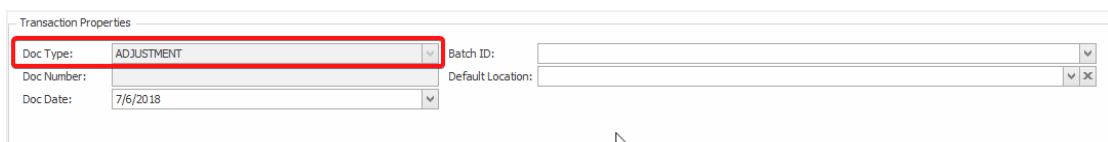
To access the Inventory Adjustment module, click the Inventory tab at the top of the screen, then click the **Inventory Adjustment** button in the Inventory ribbon.



The module will open, displaying a blank adjustment document that you can modify.



Fill out the fields in the Transaction Properties section to begin creating an Inventory Adjustment.



- The Doc Type field is read-only, so users will not be able to edit it.
- Doc Number can be set to autofill or be entered manually with the *Can Create Doc Number* sub-security for the *Inventory Adjustment Properties* security.
- Doc Date can be set to any date. If it is left blank, the field will automatically be set to today's date.
- Batch ID will determine where the adjustment document is created. This field is required to save the document.
- The Location is the warehouse that you want to adjust. This field is not required to save the document. You can set the location in the document properties and it will be used as the default setting for the line items.

Inventory Adjustment Lines

To add a line, click the **New** button under the Lines tab. This will add a blank line to the grid.

The screenshot shows the 'Inventory Adjustment Lines' window. The 'Transaction Properties' section is filled with: Doc Type: ADJUSTMENT, Doc Number: 0000000000000112, Doc Date: 7/16/2018, Batch ID: INVENTORY BATCH, and Default Location: WAREHOUSE. Below this, the 'Lines' tab is active, and the 'New' button is highlighted with a red box. The grid below is empty.

Item Number	Site	Quantity	UoM	Reason Code	Qty Available	Item Description
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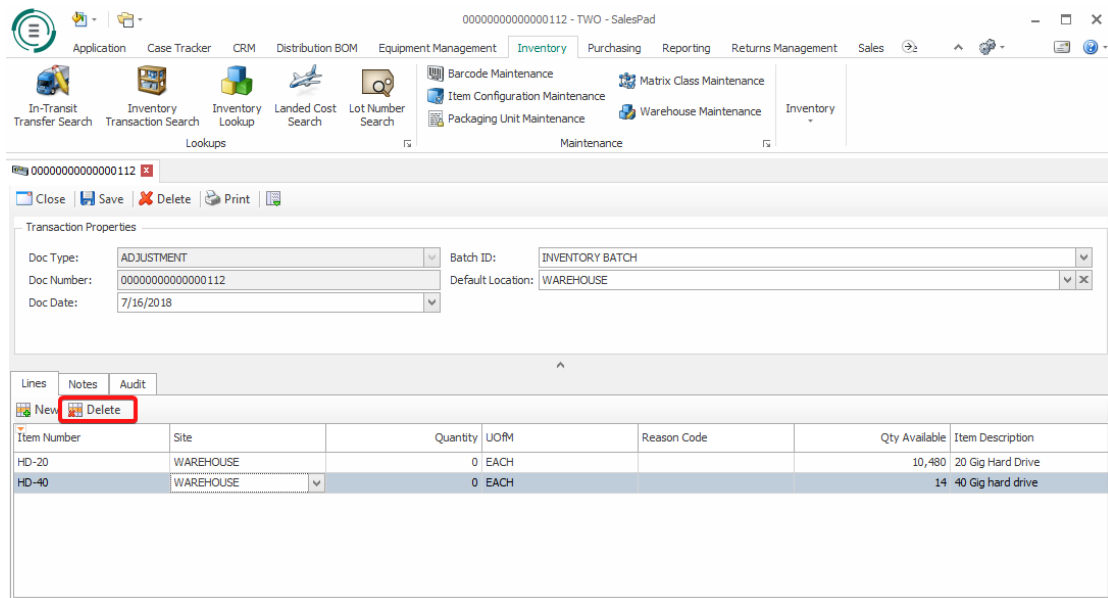
Enter your item number in the Item Number column to populate the line with the Item's data. If you are unsure of your item number, you can click the ellipsis on the right of the Item Number field to be brought to the Sales Inventory Lookup screen. The Site column can be set for each individual line item.

The screenshot shows the same 'Inventory Adjustment Lines' window, but now a line has been added to the grid. The 'New' button is no longer highlighted. The grid contains one row with the following data:

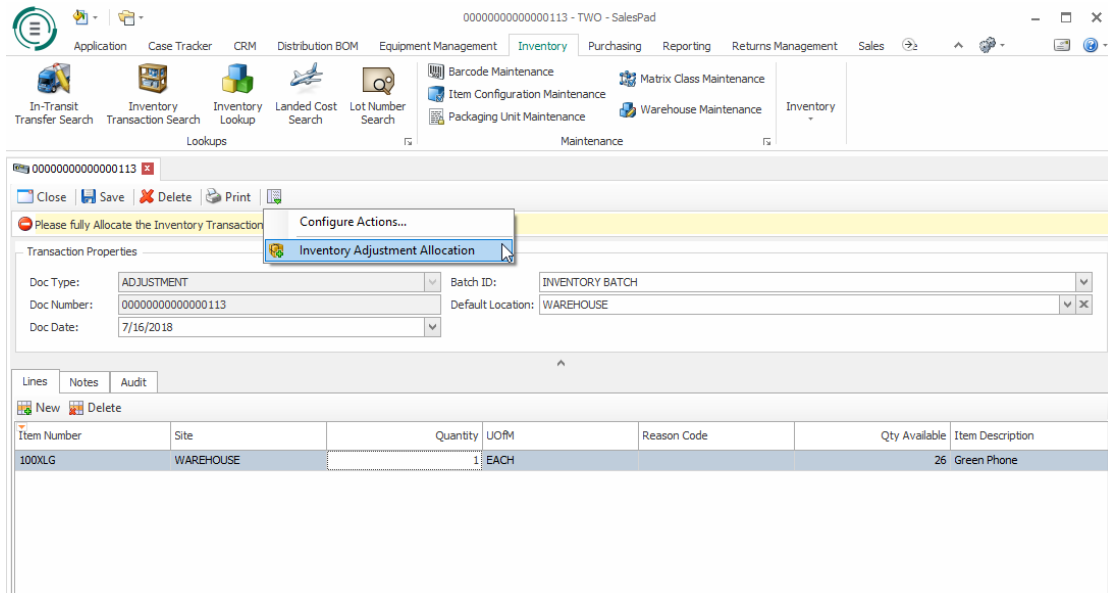
Item Number	Site	Quantity	UoM	Reason Code	Qty Available	Item Description
...	WAREHOUSE	0			0	

Set the quantity that you want to adjust in the Quantity column. This value can be positive or negative, depending on your adjustment needs. You can also adjust the item's Unit of Measure (UoM).

To delete a line, select the desired row and then click the **Delete** button. There will not be a confirmation window, so be sure you have selected the proper row before you click **Delete**.



When adjusting the inventory for serial and lot tracked items, you will need to use the Inventory Adjustment Action located in the Actions dropdown menu. This is the icon with the green down arrow at the top left of the document tab.



Click the Inventory Adjustment Allocation option to open the allocation window. Here you will be able to select the item and fulfill it by serial/lot number. Serial tracked items will need to have an individual number for each item, while lot tracked items can have multiple items per lot.

Inventory Adjustment Allocation - 0000000000000113

Item Number	Qty To Pick
100XLG	0.

Serial Number	Selected Qty	Expiration Date
100xlg0000001	1.	1/1/1900

Serial Number	Qty	Date Received
100xlg0000001	1.	1/1/1900

1

OK Cancel

After you have fulfilled the items to your liking, click the **OK** button to apply your changes and complete the allocation process.

Notes

To add a note to an inventory adjustment, navigate to the Notes tab.

Inv Adjustment - TWO - SalesPad

Application Case Tracker CRM Distribution BOM Equipment Management **Inventory** Purchasing Reporting Returns Management Sales

In-Transit Transfer Search Inventory Transaction Search Inventory Lookup Landed Cost Search Lot Number Search Barcode Maintenance Item Configuration Maintenance Packaging Unit Maintenance Matrix Class Maintenance Warehouse Maintenance

Customer Search Inv Adjustment

Close Save Delete Print

Transaction Properties

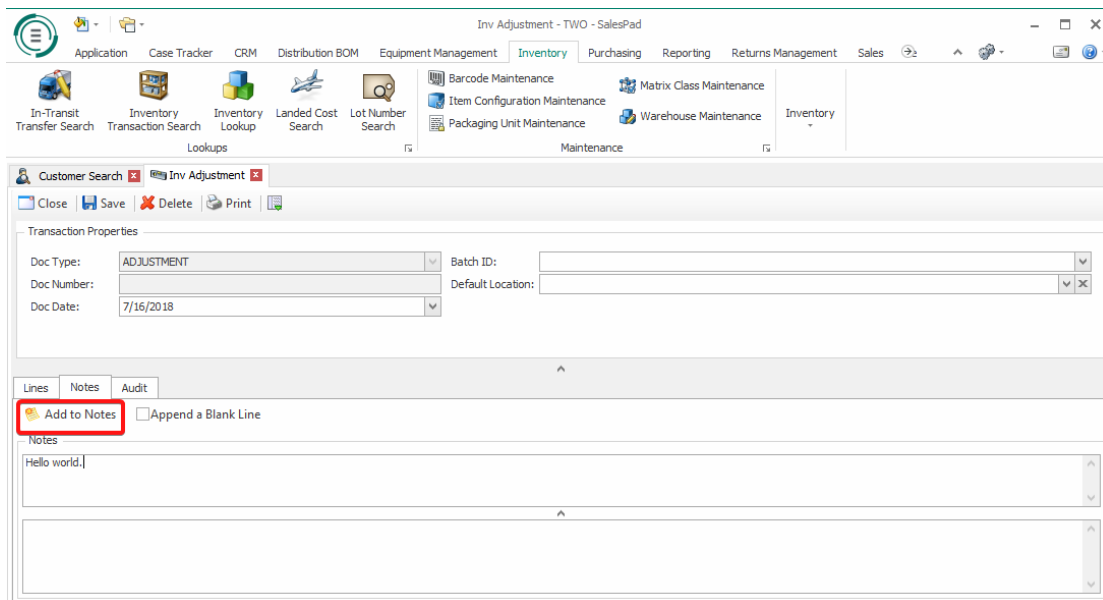
Doc Type: ADJUSTMENT Batch ID:
 Doc Number: | Default Location:
 Doc Date: 7/16/2018

Lines **Notes** Audit

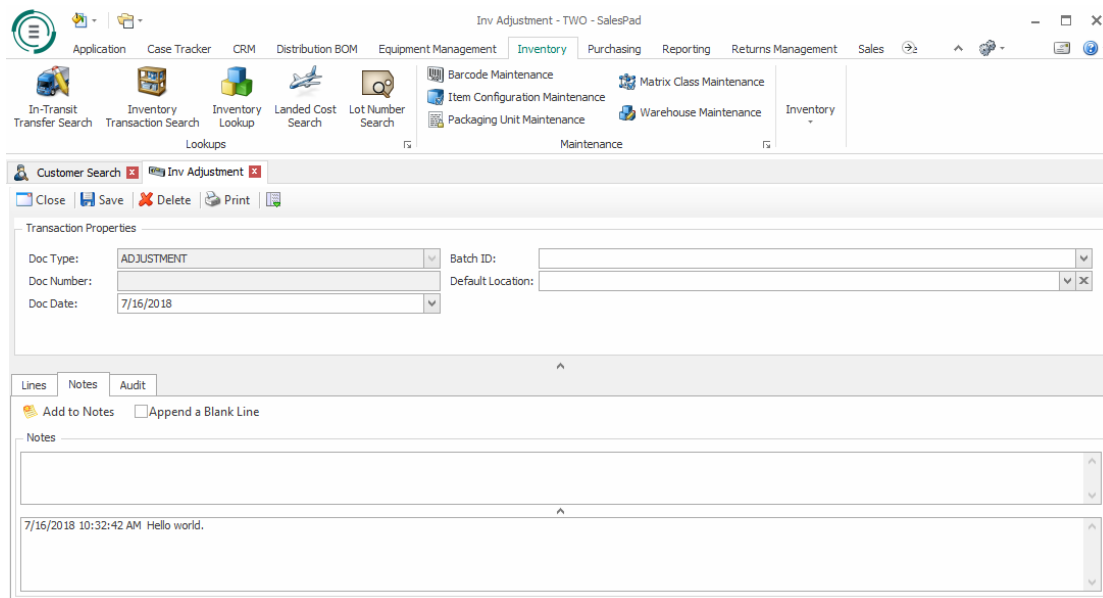
Add to Notes Append a Blank Line

Notes

Enter the note that you want to add in the Notes text box, then click the **Add to Notes** button.



The note will appear underneath the Notes text box in the Note Log with user information added to the beginning.



The note log can also be used to edit notes. It is a simple text box, so you can edit the text the same way you would in Notepad. The *Can Edit Entire Note* sub-security will need to be set to true under the *Inventory Adjustment Notes* security. After the security is enabled, simply click where you want the cursor to go and add or delete content as needed.

Security

*Inventory Adjustment** - Allows users to access the Inventory Adjustment module.

*Inventory Adjustment Allocation** - Allows users to access the Inventory Adjustment Allocation action.

*Inventory Adjustment Lines** - Allows users to see and edit lines on the Adjustment document.

*Inventory Adjustment Notes** - Allows users to access the notes tab.

*Inventory Adjustment Properties** - Allows users to see and edit the document properties.

*Inventory Adjustment Report** - Allows users to use the Inventory Adjustment printed report.

Note: Securities with an asterisk (such as *Inventory Adjustment*) have sub-securities that are listed in the middle section of the Security field. Sub-security descriptions appear in the bottom section of the field. Review and customize these as desired.