

# How to Create Inventory Adjustment - Lot Status change

This type of inventory adjustment is used to change the Lot Status for a specific lot.

The following will guide you on how to create this type of inventory adjustment.

1. There are 2 ways where you can create a new Inventory Shipment.
  - a. From Inventory module > click on **Inventory Adjustment** menu. The **Inventory Adjustment** search will be shown. Click **New**.

Inventory Adjustment - IA-829

Menu: New, Save, Search, Delete, Undo, Print, Unpost, Close

Tabs: Details, Activities, Attachments, Unpost Preview, Post History, Audit Log

Location: 0001-Fort Wayne Date: 08/28/2018 Adjustment Type: Item Change Adjustment No: IA-829

Description:

Items

Item No.	Description	Storage Location	Storage Unit	Ownership Type	Lot ID	UOM	Available Qty	Adjust Qty By	New Quantity	New Item No.	New Item Description
CORN	CORN			Own		lb	1,631,258.00	-1,631,158	100.00	#2 Corn	#2 Corn

If there are no existing records yet, upon clicking Inventory Adjustment screen, it will open a new Inventory Adjustment screen.

- b. From an existing Inventory Adjustment transaction, click **New**.
2. The **Inventory Adjustment** search will be shown. Click **New**.

Inventory Adjustment

Close

Inventory Adjustment Details

Open Selected New Export Columns View Items Categories Commodities Locations Storage Units 830 records

Location Name Contains Add Filter Clear Filters

Location Name	Adjustment Date	Adjustment Type	Adjustment No	Description	Posted
0001-Fort Wayne	12/26/2018	Quantity Change	IA-830		✓
0001-Fort Wayne	08/28/2018	Item Change	IA-829		✓
0001-Fort Wayne	08/27/2018	Lot Move	IA-828		✓
0001-Fort Wayne	08/27/2018	Lot Move	IA-827		✓
0001-Fort Wayne	08/27/2018	Lot Move	IA-826		✓
0001-Fort Wayne	08/27/2018	Lot Move	IA-825		✓
0001-Fort Wayne	08/27/2018	Lot Move	IA-824		✓
0001-Fort Wayne	08/27/2018	Lot Move	IA-823		✓
0001-Fort Wayne	08/27/2018	Lot Move	IA-822		✓
0001-Fort Wayne	08/27/2018	Lot Move	IA-821		✓
0001-Fort Wayne	08/27/2018	Lot Move	IA-820		✓
0001-Fort Wayne	08/27/2018	Lot Move	IA-819		✓
0001-Fort Wayne	08/27/2018	Lot Move	IA-818		✓
0001-Fort Wayne	08/27/2018	Lot Move	IA-817		✓

Ready Refresh

3. This will open a new Inventory Adjustment screen.

Inventory Adjustment -

Menu: New, Save, Search, Delete, Undo, Print, Post, Close

Tabs: Details, Activities, Attachments, Post Preview, Post History, Audit Log

Location: 0001-Fort Wayne Date: 12/26/2018 Adjustment Type: Quantity Change Adjustment No: Created on Save

Description:

Items

Item No.	Description	Storage Location	Storage Unit	Ownership Type	Lot ID	UOM	Available Qty	Adjust Qty By	New Quantity	New Lot Number	New Unit Cost
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4. Select Location in the **Location** field.



If you would like to always use your user's Location when creating Inventory Adjustment, then setup the Default Location from the Users screen.

System Manager > Users > select your user > in the Default Location field select your default location.

The screenshot shows the 'Entity - iRely Admin' window with the 'User' tab selected. The 'User' sub-tab is active, showing details for a user named 'irelyadmin'. The 'Default Location' field in the 'Settings' section is highlighted with a red box and set to '1000-Location A'. Other fields include Username, Title, Contact Method, Department, JIRA Username, Dashboard Role, and Default Role.

The screenshot shows the 'Inventory Adjustment -' window with the 'Quantity Change' adjustment type selected. The 'Location' field is set to '0001-Fort Wayne' and the 'Date' is '12/26/2018'. The 'Items' table is empty, and the 'Adjustment No.' is 'Created on Save'.

5. In the Adjustment Type, select **Lot Status Change**.

The screenshot shows the 'Inventory Adjustment -' window with the 'Lot Status Change' adjustment type selected. The 'Location' field is set to '0001-Fort Wayne' and the 'Date' is '12/26/2018'. The 'Items' table is empty, and the 'Adjustment No.' is 'Created on Save'.

6. Enter other relevant inventory adjustment information. See [Inventory Adjustment - Field Description](#).

7. In the grid area,

- a. Select a lot tracked item to be adjusted in the **Item No** field. As item is selected, all other item information will automatically be filled in like Item Description.

The screenshot shows the 'Inventory Adjustment' window. The 'Location' is set to '0001-Fort Wayne', the 'Date' is '12/26/2018', and the 'Adjustment Type' is 'Lot Status Change'. The 'Items' table has one row selected: 'CORN-B' with description 'Corn for Blending', 'Storage Location' 'Raw Station', 'Storage Unit' 'Own', 'Lot ID' 'Active', and 'New Lot Status' 'Active'. The 'Item No' field is highlighted with a red box.

- b. Select the sub location where the item is stored in the **Sub Location** field.

The screenshot shows the 'Inventory Adjustment' window. The 'Item No' field is still 'CORN-B'. The 'Storage Location' dropdown menu is open, showing a list of sub locations: 'Processing Plant', 'FG Station', 'Production Line', 'Steinhorn', 'Blending', and 'Raw Station'. The 'Raw Station' option is highlighted with a red box.

- c. Select the storage location where the item is stored in the **Storage Location** field.

The screenshot shows the 'Inventory Adjustment' window. The 'Item No' is 'CORN-B' and the 'Storage Location' is 'Raw Station'. The 'Storage Unit' dropdown menu is open, showing a list of storage units: 'RM Storage', 'RM Bin 1', 'RM Bin 2', 'RM Bin 3', 'RM Silo', and 'RM Silo 1'. The 'RM Silo 1' option is highlighted with a red box.

d. In the **Lot ID** field select a lot id that you want to adjust the expiry date.

The screenshot shows the 'Inventory Adjustment' window. The 'Location' is '0001-Fort Wayne' and the 'Date' is '12/26/2018'. The 'Adjustment Type' is 'Lot Status Change'. The 'Items' table has one row: 'CORN-B' (Corn for Blending, Raw Station, RM Silo 1, Own). The 'Lot ID' dropdown is open, showing a list of lot numbers: LOT-20, L163270001, L163270002, L163270003, L163270004, and L163270005. The 'Lot Status' is 'Active'.

Lot Number	On Hand	Lot Cost	Storage Location Name	Storage Unit Name
LOT-20	0.00	0.02	Processing Plant	RM Storage
L163270001	10,000.00	1.40	Raw Station	RM Silo 1
L163270002	10,000.00	1.40	Raw Station	RM Silo 1
L163270003	10,000.00	1.40	Raw Station	RM Silo 1
L163270004	10,000.00	1.40	Raw Station	RM Silo 1
L163270005	10,000.00	1.40	Raw Station	RM Silo 1

e. The **Lot Status** field will show the current status of the item > lot.

The screenshot shows the 'Inventory Adjustment' window. The 'Lot ID' is now 'L163270001' and the 'Lot Status' is 'Active'.

Item No.	Description	Storage Location	Storage Unit	Ownership Type	Lot ID	Lot Status	New Lot Status
CORN-B	Corn for Blending	Raw Station	RM Silo 1	Own	L163270001	Active	

f. To adjust the **Lot Status**, enter the select a status on the **New Lot Status** field.

The screenshot shows the 'Inventory Adjustment' window. The 'New Lot Status' dropdown is open, showing a list of status options: Secondary Status, Pre-Sanitized, Quarantine, On Hold, and Active. The 'On Hold' option is selected.

Secondary Status	Description	Primary Status
Pre-Sanitized	Pre-Sanitized	Quarantine
Quarantine	This is system used lot status. Plea...	Quarantine
On Hold	This is system used lot status. Plea...	On Hold
Active	This is system used lot status. Plea...	Active

8. Save the record and post it later or you may directly post this transaction.

- a. Save the record. You can click **Save** or use the shortcut key **Ctrl+S**. In case you miss to save it and you click the **Close** or the **x button** at the top right corner of the screen or use the shortcut key **Alt+X** or **Esc**, i21 will prompt you if you would like to save it before closing the screen.

The screenshot shows the 'Inventory Adjustment - IA-831' window. The 'Details' tab is active, displaying the following information:

- Location: 0001-Fort Wayne
- Date: 12/26/2018
- Adjustment Type: Lot Status Change
- Adjustment No: IA-831

The 'Items' table contains one record:

Item No.	Description	Storage Location	Storage Unit	Ownership Type	Lot ID	Lot Status	New Lot Status
CORN-B	Corn for Blending	Raw Station	RM Silo 1	Own	L163270001	Active	On Hold

The status bar at the bottom indicates 'Saved'.

- b. Post Inventory Adjustment. See [How to Unpost Inventory Adjustment](#).

The screenshot shows the 'Inventory Adjustment - IA-831' window. The 'Details' tab is active, displaying the same information as the previous screenshot:

- Location: 0001-Fort Wayne
- Date: 12/26/2018
- Adjustment Type: Lot Status Change
- Adjustment No: IA-831

The 'Items' table contains one record:

Item No.	Description	Storage Location	Storage Unit	Ownership Type	Lot ID	Lot Status	New Lot Status
CORN-B	Corn for Blending	Raw Station	RM Silo 1	Own	L163270001	Active	On Hold

The status bar at the bottom indicates 'Posted'.