



# CREATE AND MANAGE INVENTORY ORGS

## QUICK REFERENCE GUIDE INV-02

INV

### Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation on how to Create and Manage Inventory Organizations (Inventory Orgs) in the North Carolina Financial System (**NCFS**).

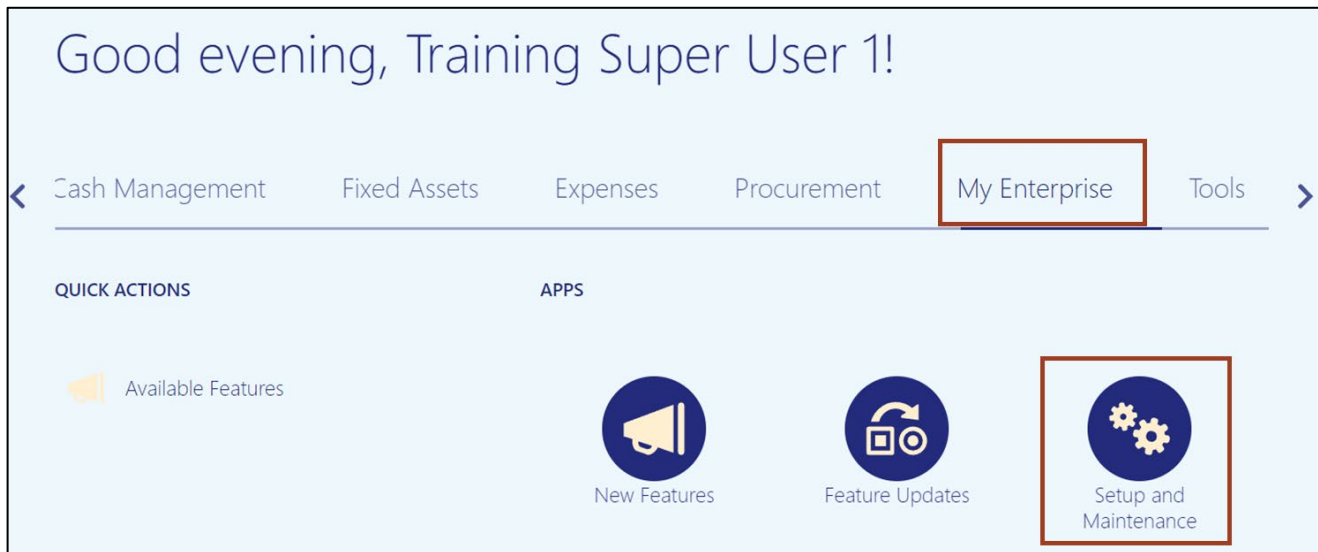
### Introduction and Overview

This QRG covers how to create and manage inventory orgs in NCFS.

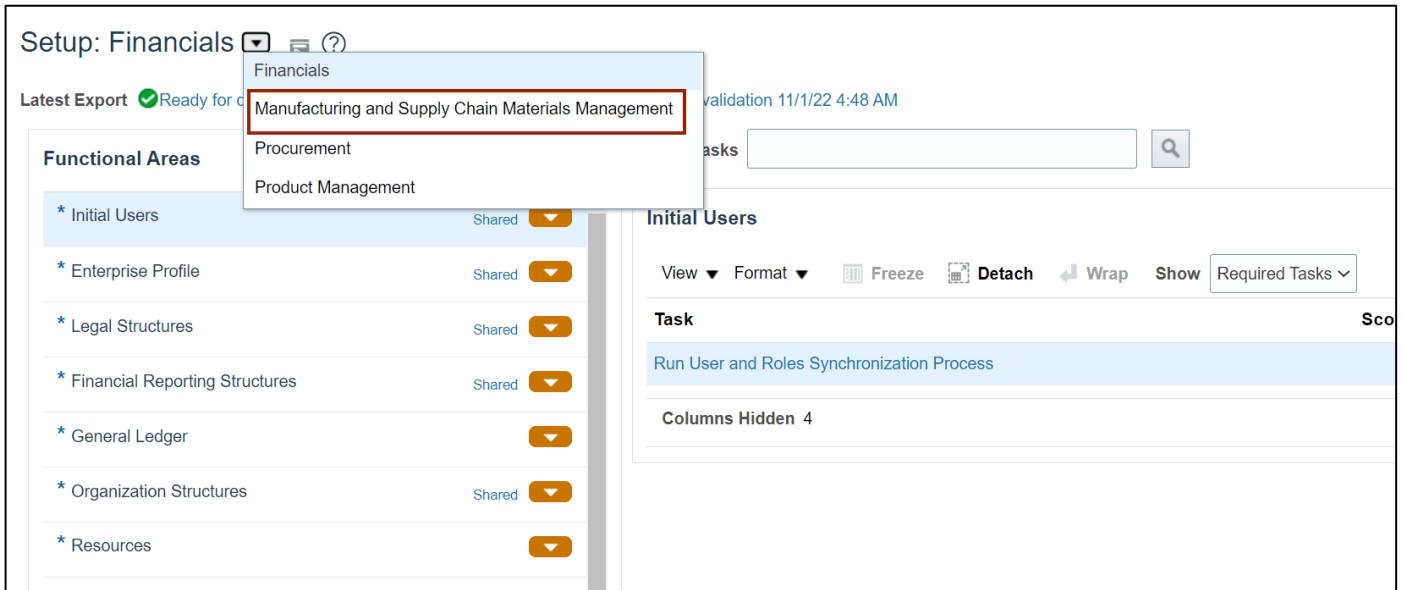
### Create and Manage Inventory Organizations

To create inventory orgs in NCFS, please follow the steps below:

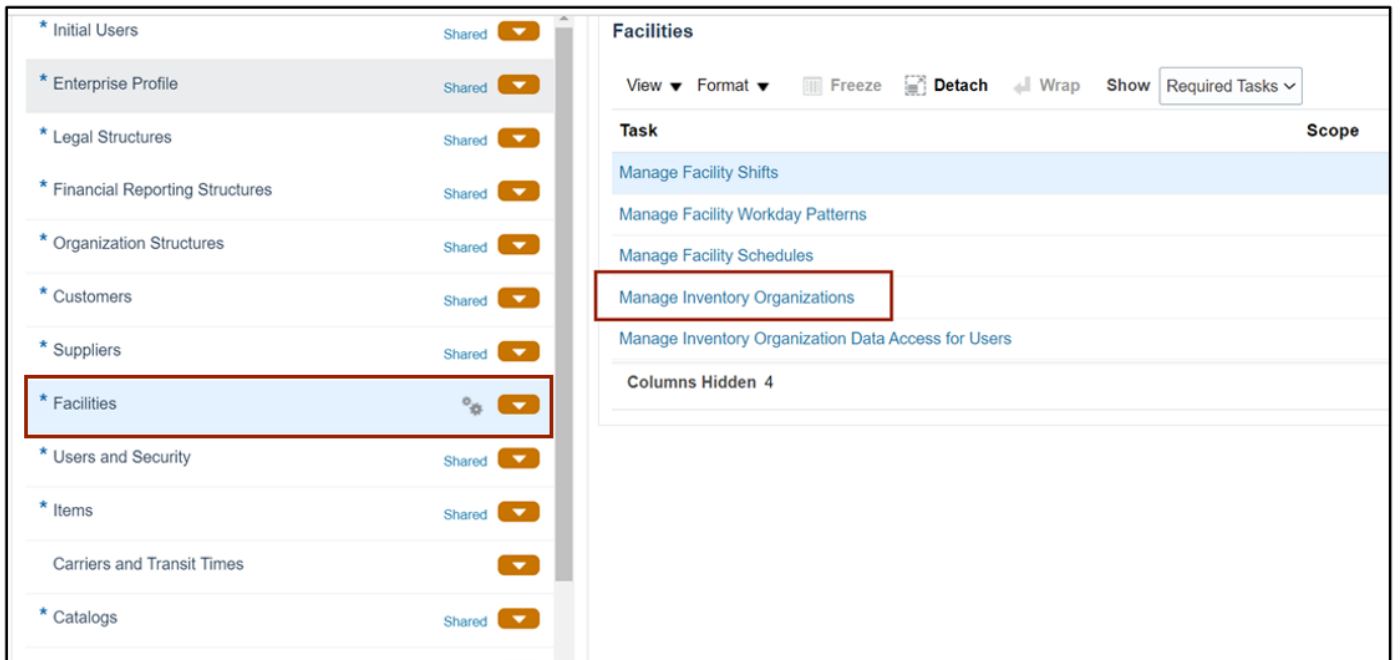
1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, click the **My Enterprise** tab and click the **Setup and Maintenance** app.



3. From the **Setup: Financials** drop-down choice list, select **Manufacturing and Supply Chain Materials Management**.



4. Select the **Facilities** option and then click the **Manage Inventory Organizations** link.



5. In the **Search Results** section, click the **Add [ + ]** icon.

Organization  Profit Center Business Unit

Organization Name  Legal Entity

Management Business Unit

Search Results

Actions ▾ View ▾ Format ▾ **+** Freeze Detach Wrap Manage Organization Parameters

Organization	Organization Name
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6. Click the **Create new** radio button and enter the **Basic Information**. Then click the **Next** button.

Create Inventory Organization ? Back **Next** Save Save and Close Cancel

**Create new**  
 Select an existing organization

Basic Information

\* Name 38 SIT INV ORG2 Primary Ledger NC CASH US  
 \* Organization 38SITORG2 \* Legal Entity NC DHHS CONTROLLERS OFFI  
 Usage Inventory management Profit Center Business Unit 3000 DHHS MENTAL HEALTH  
 \* Management Business Unit 3000 DHHS MENTAL HEALTH Status Active

Location Address

\* Name 3000DHHSNI-2019 MAIL SERVICE CENTER Internal or External Internal  
 Address STATION ROAD RALEIGHNC 276030000 US Internal Address Line

- Click the **General** tab, and enter the required **General information** as provided in the screenshot.

Manage Inventory Organization Parameters: 38 SI... ?

Back Next Save Save and Close Cancel

Financial Information

Management Business Unit 3000 DHHS MENTAL HEALTH Legal Entity NC DHHS CONTROLLERS OFFICE  
 Primary Ledger NC CASH US Profit Center Business Unit 3000 DHHS MENTAL HEALTH

General Lot, Serial Number, and Packing Unit Item Sourcing Details Additional Information

General Information ?

Item Definition Settings Inventory Settings

\* Item Master Organization INVENTORY ITEM MASTER \* Schedule SHIFT SCHEDULE  Allow negative balances  
 \* Item Grouping Behavior Definition Organization  Allow negative on-hand transacti  
 Item Definition Organization 38 SIT INV ORG2 Time Zone (UTC-05:00) New York - Ea  Use original receipt date  
 \* Starting Revision 0 Locator Control Locator control determined  Round reorder quantity  
 Warehouse accepts substitute items  Automatically cancel transfer ord  
 Use current item cost

- Click the **Item Sourcing Details** tab, enter the **Picking Defaults and Type** information as provided in the screenshot.

**Note:** Select **Supplier** as **Type** if Inventory Organization will be procured through supplier else it can be left as blank.

General Lot, Serial Number, and Packing Unit **Item Sourcing Details** Additional Information

Picking Defaults ?

Picking Rule Rotate stock  Pick confirmation required  
 Subinventory Order  Overpicking for movement requests enabled  
 Locator Order  Allow overpicking for special handling  
 Quantity Exception Reason  Automatically populate picked quantity during pick confirm  
 Capture picking exceptions

Item Sourcing Details ?

Type Supplier  Purchasing by revision  
 Organization  
 Subinventory

Distribution Parameters ?

9. Click the **Save and Close** button.

Manage Inventory Organization Parameters: 38 SI... ?

Back Next Save **Save and Close** Cancel

Financial Information

Management Business Unit 3000 DHHS MENTAL HEALTH Legal Entity NC DHHS CONTROLLERS OFFICE  
 Primary Ledger NC CASH US Profit Center Business Unit 3000 DHHS MENTAL HEALTH

General Lot, Serial Number, and Packing Unit Item Sourcing Details Additional Information

General Information ?

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 Item Definition Organization 38 SIT INV ORG2 Locator Control Locator control determined  Use original receipt date  
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 Use current item cost

10. To inactivate Inventory Organization, select the **Facilities** option and click the **Manage Inventory Organizations** link.

\* Initial Users Shared

\* Enterprise Profile Shared

\* Legal Structures Shared

\* Financial Reporting Structures Shared

\* Organization Structures Shared

\* Customers Shared

\* Suppliers Shared

**\* Facilities** Shared

\* Users and Security Shared

\* Items Shared

Carriers and Transit Times

\* Catalogs Shared

Facilities

View Format Freeze Detach Wrap Show Required Tasks

Task	Scope
Manage Facility Shifts	
Manage Facility Workday Patterns	
Manage Facility Schedules	
<b>Manage Inventory Organizations</b>	
Manage Inventory Organization Data Access for Users	

Columns Hidden 4

11. Select the required **Organization** and click the **Search** button.

Manage Inventory Organizations ? Done

**Search** Advanced Saved Search All Inventory Organizations

Organization: 38 SIT INV ORG2  
 Organization Name:   
 Management Business Unit: 3000 DHHS MENTAL HEALTH

Profit Center Business Unit: 3000 DHHS MENTAL HEALTH  
 Legal Entity:

**Search** Reset Save...

Search Results

12. From the **Search Result** section, select the required organization.

Manage Inventory Organizations ? Done

**Search** Advanced Saved Search All Inventory Organizations

Organization: 38SITORG2  
 Organization Name:   
 Management Business Unit:

Profit Center Business Unit:   
 Legal Entity:

Search Reset Save...

Search Results

Actions View Format + Freeze Detach Wrap Manage Organization Parameters

Organization	Organization Name
38SITORG2	38 SIT INV ORG2

Columns Hidden 7

13. From the **Actions** drop-down choice list, and select the **Edit** option.

Legal Entity:

**Actions** View Format + Freeze Detach Wrap Manage Organization Parameters

- Create
- Edit**
- Manage Organization Parameters
- Validate Item Grouping Change
- Process Item Grouping Change

Organization	Organization Name
38SITORG2	38 SIT INV ORG2

Columns Hidden 7

14. Click the **Status** drop-down choice list, select **Inactive**, and then click the **Next** button.

15. Click the **Save and Close** button.

## Wrap-Up

Create and Manage Inventory Orgs using the steps above in NCFS.

## Additional Resources

### Virtual Instructor-Led Training (vILT)

- Inventory Agency Manager (ILT)