ASSOCIATE NEW ITEMS TO INVENTORY ORGS

QUICK REFERENCE GUIDE INV-08

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Associate New Items to Inventory Organizations in the North Carolina Financial System (**NCFS**)**.**

Introduction and Overview

This QRG covers explanation on associating new items to the inventory organizations in NCFS which is required to store or transfer materials across the organizations.
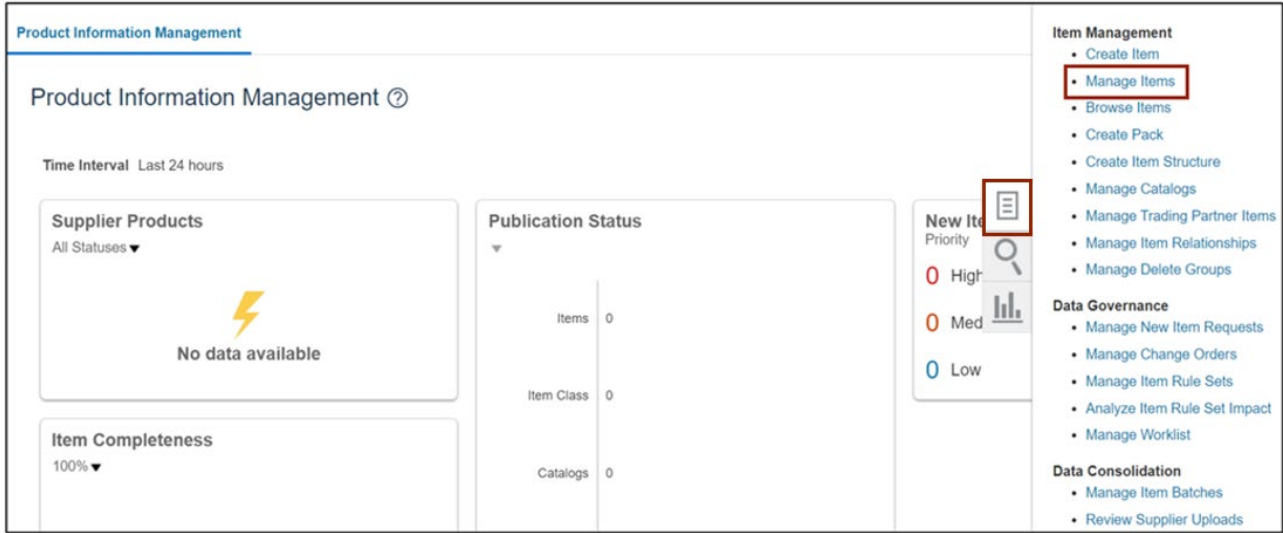
Associate New Items to Inventory Orgs

To associate new items to inventory orgs in NCFS, please follow the steps below:

1. Log in to the NCFS with your credentials to access the system.

2. On the **Home** page, under the **Product Management** tab, click the **Product Information Management** app.
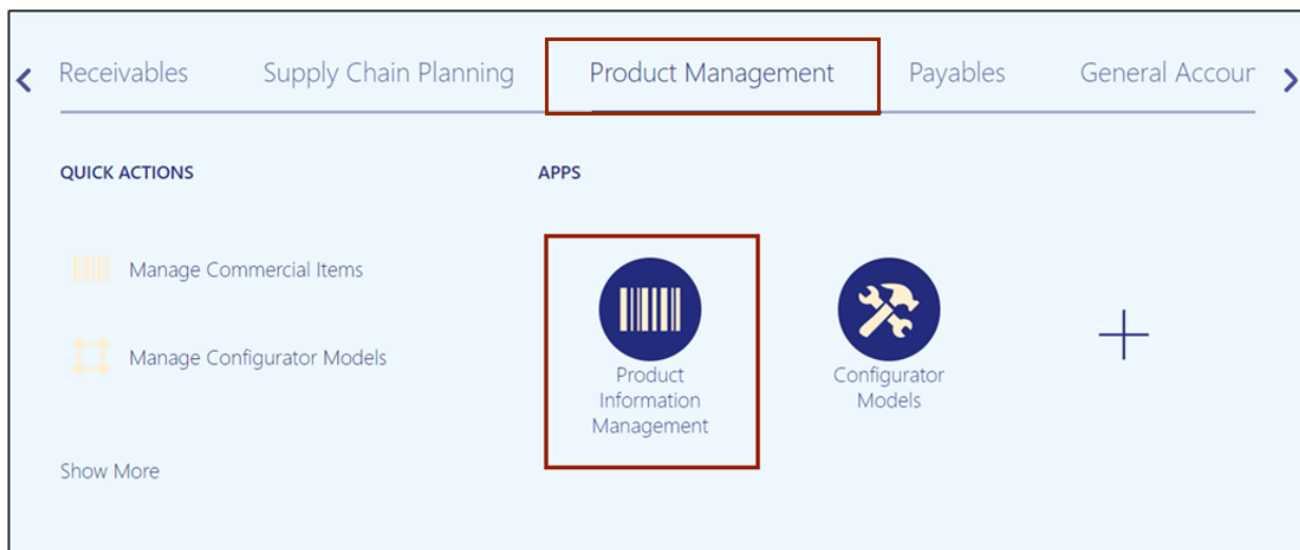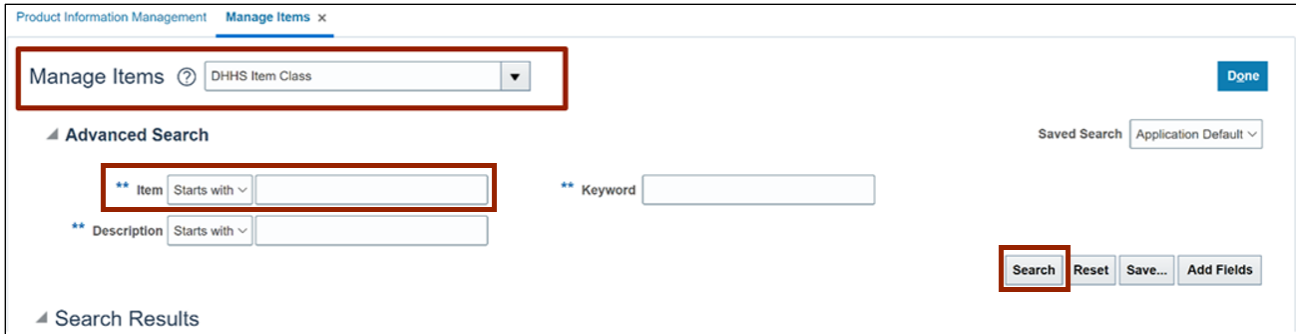
3. Click the **Tasks [☰]** icon. Under the *Item Management* section, click the **Manage Items** link.

4. Select the required **Root Item class**.

   In this example, we choose **DHSS Item Class**. In the *Advanced Search* section, enter the *Item* number. In this example, we choose **3000822**. Click the **Search** button.

5. Click the **3000822** link in the *Item* column with **Organization** as **ITEMMASTERORG.**

6. Click the **Associations** tab.

7. Click the **Select and Add [⊞]** icon.

8. The *Select and Add: Organizations* pop-up appears. Enter the **Organization** details and Click the **Search [🔍]** icon.
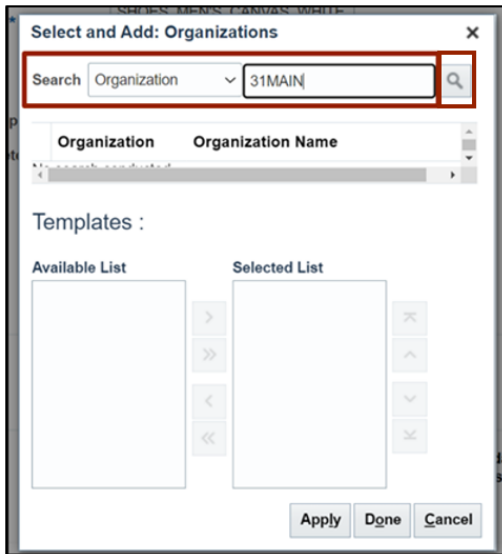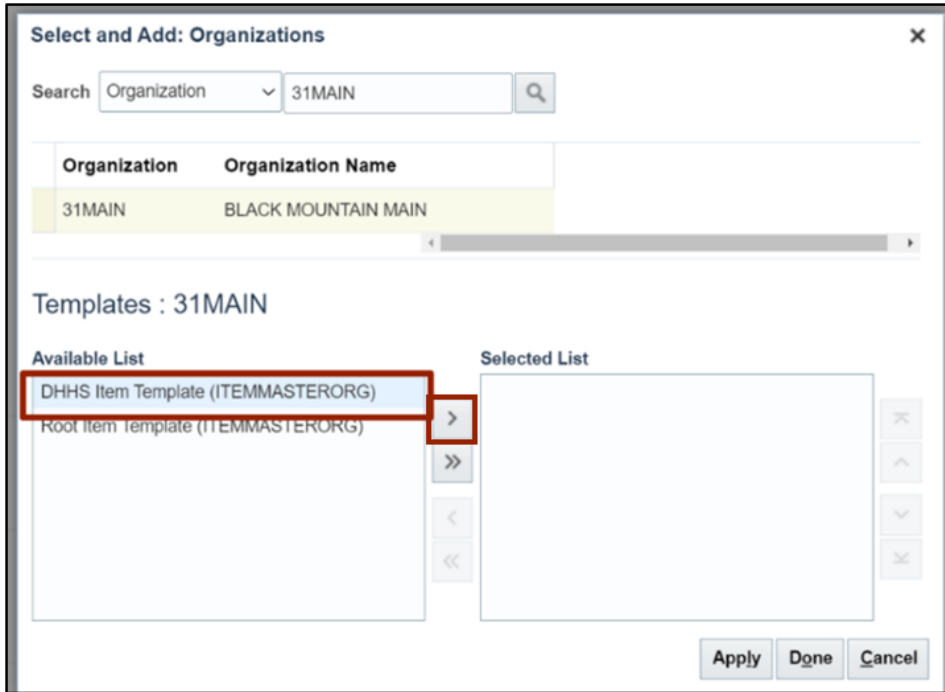

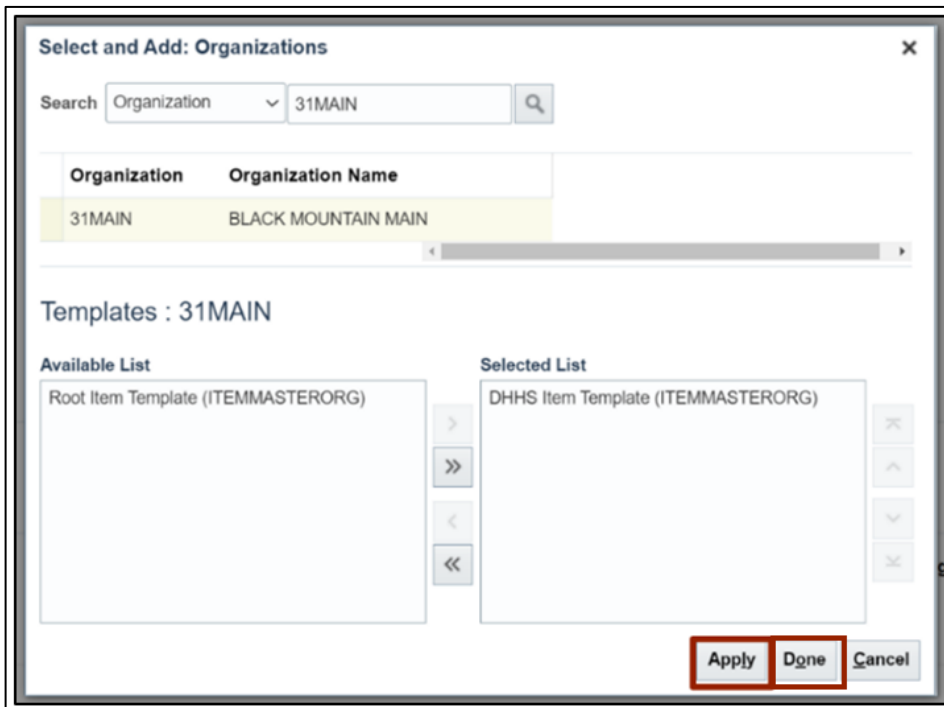9. Select the required ***Organization***.

   In this example, we choose **31MAIN.**
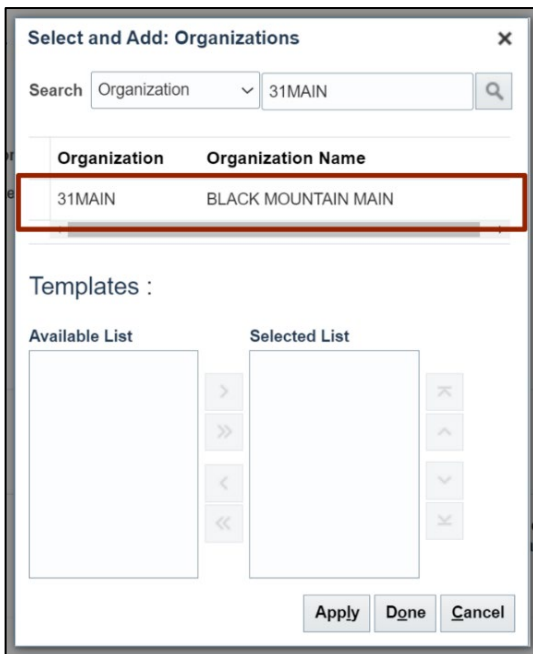
10. Select the appropriate **Template** to be applied as per the Business requirement. Click the **Select [>] icon.**

11. Click the **Apply** button. Click the **Done** button to close the dialog box and return to the **Create Item** page.

Associate New Items to Non-Inventory Organization

Note: Repeat Step 8 to Step 12 to assign the new item to the Non-Inventory Organization for the agency. This is a mandatory step as it enables Self-Service Procurement orders to be placed on the item along with other functionality.

12. On the **Associations** tab, click the item **3000822** link for Non-Inventory Organization.

13. Click the **Specifications** tab. In the *Item Organization* section, click **Manufacturing**.

14. Update the *Inventory Asset Value* field as **No.**

15. Click the **Save** button.

16. In the *Item Organization* section, click **Inventory**.

17. Update the *Stocked* field as **No.**

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

Wrap-Up

Associate new items to inventory orgs in NCFS using the steps above.

Additional Resources

Virtual Instructor-Led Training (vILT)

- INV101: Inventory Agency Manager
- INV109: Inventory Item Maintenance