



CREATE SUBINVENTORIES

INV

QUICK REFERENCE GUIDE INV-22

Purpose

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

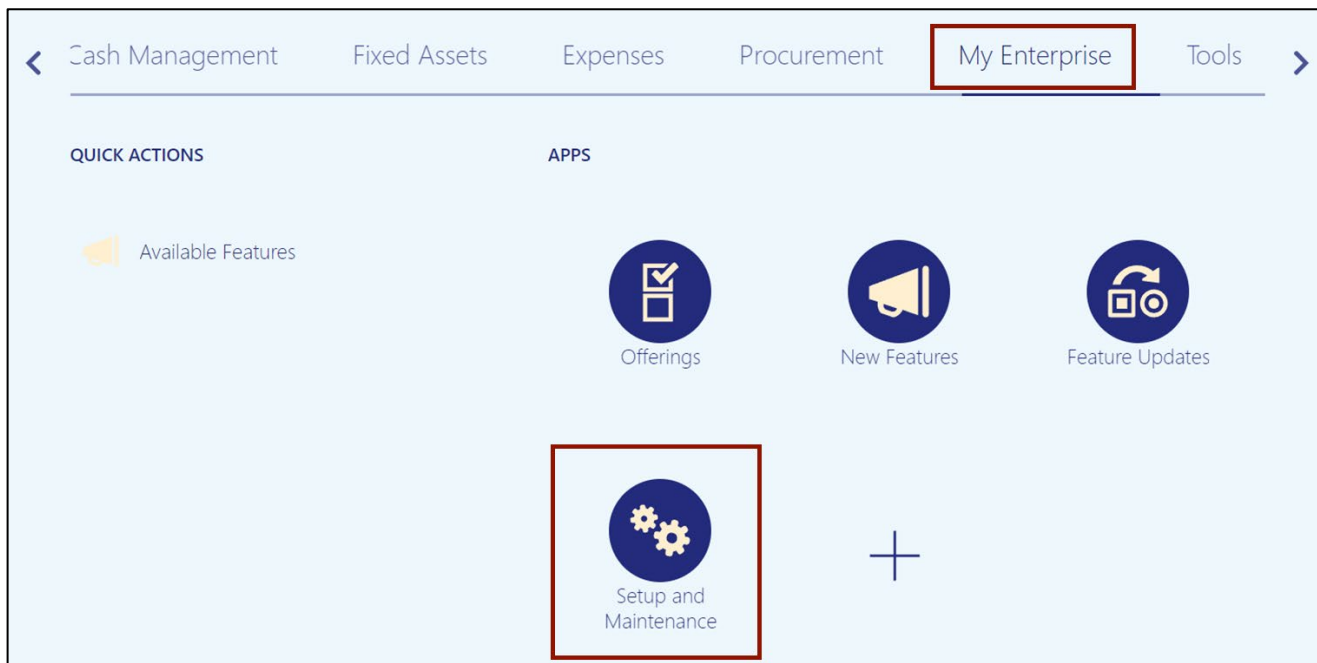
Introduction and Overview

This QRG covers how to create subinventories to store and transfer materials in and out of the Inventory Organization in NCFS.

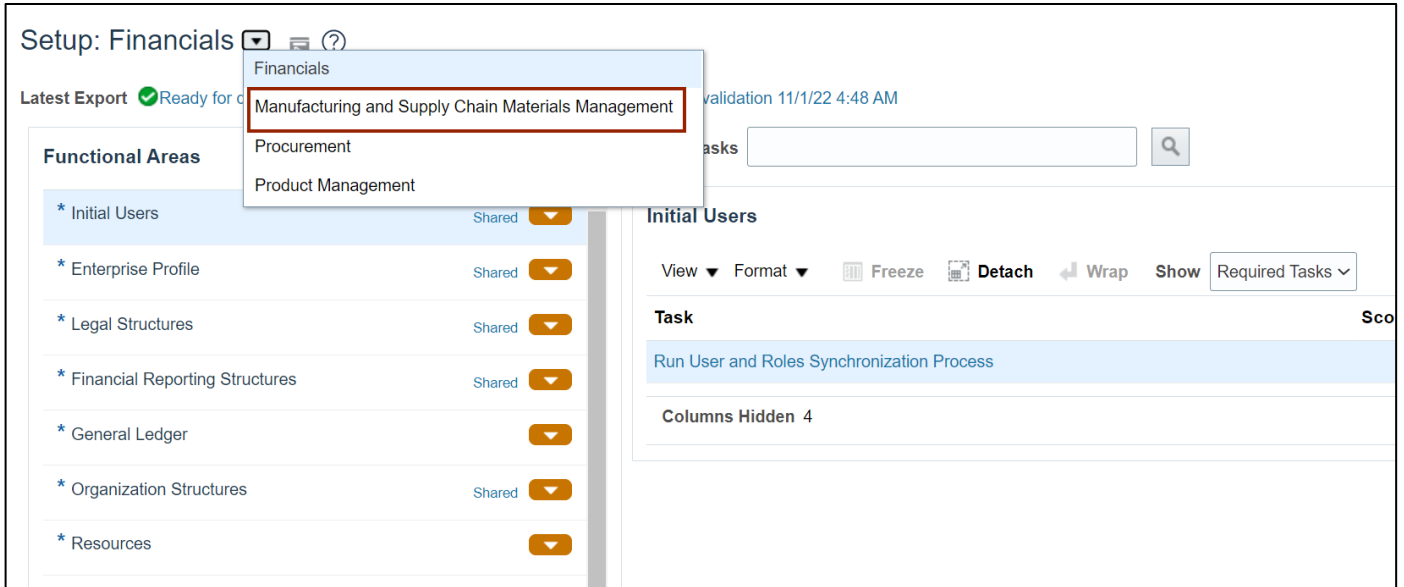
Create and manage Subinventories

To create subinventory in NCFS, please follow the below steps:

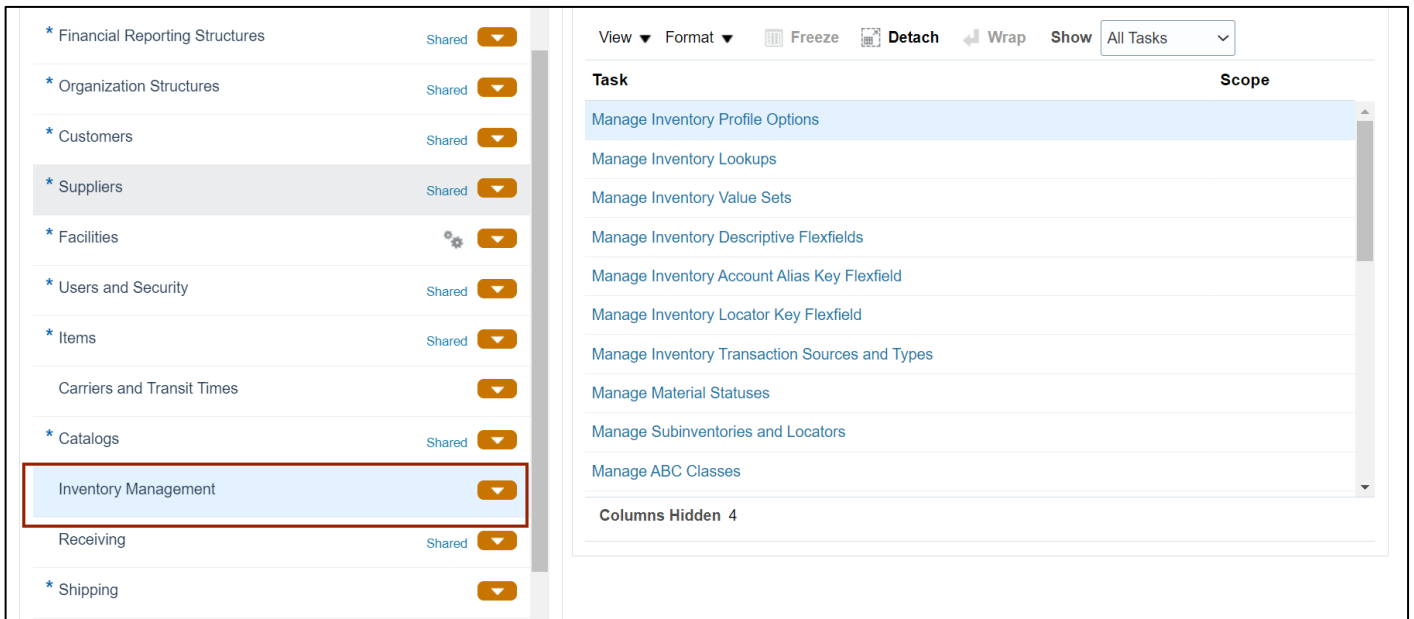
1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, click the **My Enterprise** tab, and then click the **Setup and Maintenance** app.



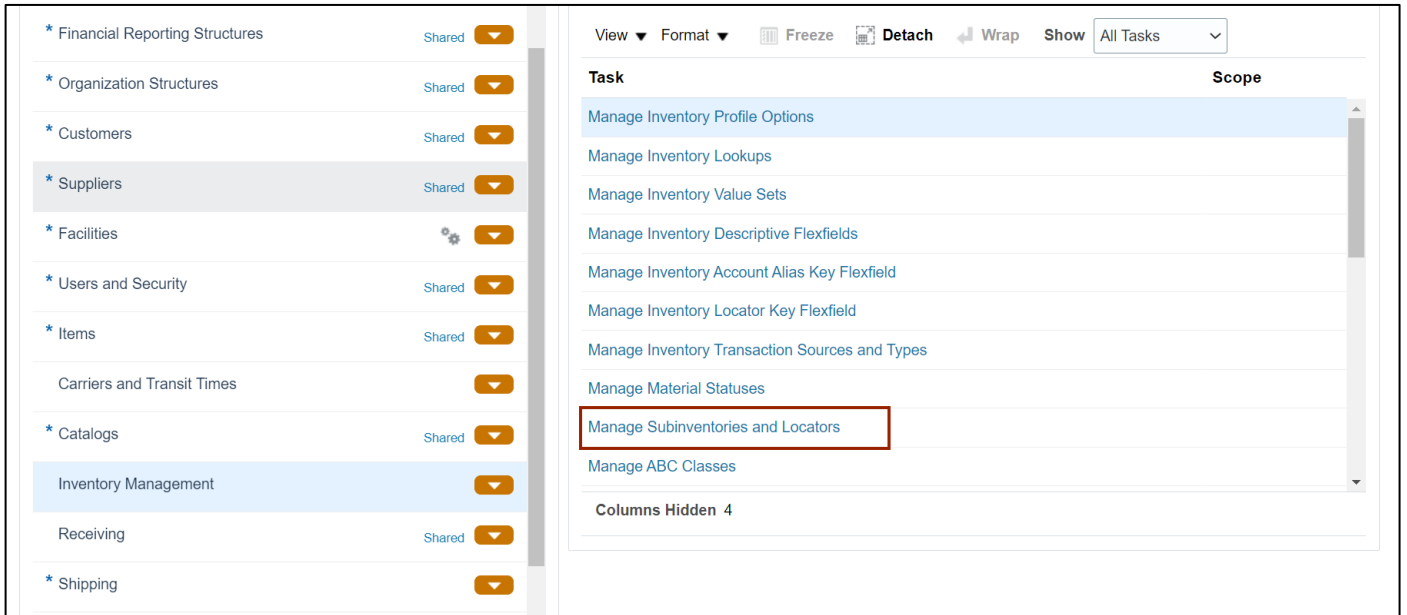
- On the **Setup** page, select the option **Manufacturing and Supply Chain Materials Management** from the **Setup: Financials** drop-down choice list.



- Select the **Inventory Management** option from the **Manufacturing and Supply Chain Materials Management** section.

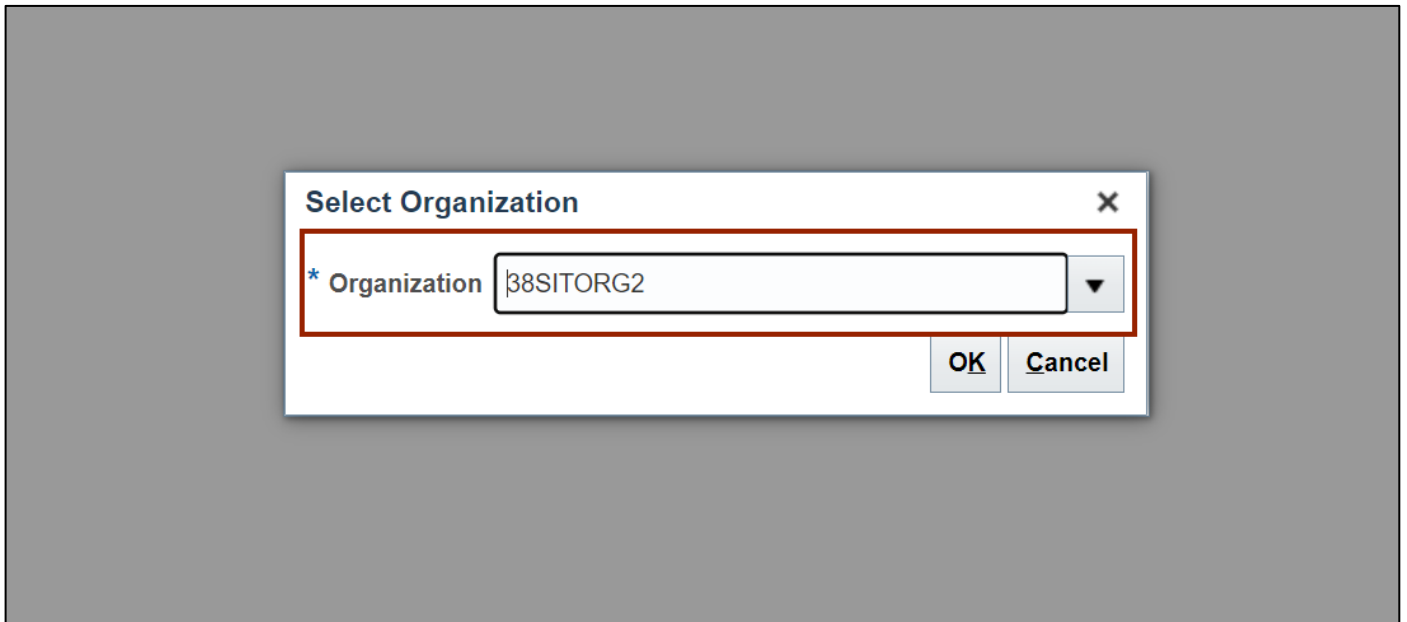


5. Click **Manage Subinventories and Locators**.



6. Select the required **Organization**.

In this example, we choose **38SITORG2**.



7. On the **Manage Subinventories** page, click the **Add [+]** icon.

The screenshot shows the 'Manage Subinventories' interface. At the top right, it displays 'Inventory Organization 38SITORG2' and buttons for 'Change Organization' and 'Done'. A search section includes filters for Subinventory, Description, Locator Control, Subinventory Type, and Material Status. Below the search filters are buttons for 'Search', 'Reset', 'Add Fields', and 'Reorder'. The 'Search Results' section shows a table with columns: Subinventory, Description, Active, Material Status, Locator Control, Subinventory Type, and Additional Information. A red box highlights the '+ Add' icon in the 'Actions' column of the table.

8. In the **Summary** section, enter details in the mandatory fields (marked as *) and other fields as required.

In this example, we choose the following details:

- **SITSUBINV** in ***Subinventory** field
- **Active** from ***Material Status** field drop-down choice list
- **B100COSMETICNI-121 EDINBURGH SOUTH DRIVE STE 209** from **Location** field drop-down choice list

The screenshot shows the 'Create Subinventory' page, specifically the 'Summary' section. A red box highlights the following fields:

- * Subinventory:** SITSUBINV
- Description:** SIT SUBINVENTORY2
- End Date:** m/d/yy
- * Material Status:** Active
- Subinventory Type:** Storage
- Locator Control:** None
- Location:** B100COSMETICNI-121 EDINBURGH SOUTH DRIVE STE 209
- Locator Structure:** Four-Segment Locator Structure Instance
- Picking Order:** (empty)
- Asset subinventory:**
- Depreciable:**
- Quantity tracked:**
- PAR location:**
- Subinventory Group:** (empty)
- Replenishment Count Method:** Count
- Default Replenishment Count Type:** Order par
- Source Type:** (empty)

 Buttons for 'Save and Close' and 'Cancel' are visible at the top right.

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

The screenshot shows the 'Create Subinventory' form with the following fields and values:

- Summary**
- * Subinventory: SITSUBINV
- Description: SIT SUBINVENTORY2
- End Date: m/d/yy
- * Material Status: Active
- Subinventory Type: Storage
- Locator Control: None
- Location: B100COSMETICNI-121 EDINBURGH SOUTH DRIVE STE 209
- Locator Structure: Four-Segment Locator Structure Instance
- Picking Order: (empty)
- Asset subinventory:
- Depreciable:
- Quantity tracked:
- PAR location:
- Subinventory Group: (empty)
- Replenishment Count Method: Count
- Default Replenishment Count Type: Order par

The 'Save and Close' button is highlighted with a red box.

10. A *Confirmation* pop-up appears. Click the **OK** button.

The screenshot shows a 'Confirmation' pop-up dialog box with the text 'Your changes were saved.' and an 'OK' button highlighted with a red box. The background shows the 'Inventory Organization' page with the following table:

	Active	Material Status	Locator Control
TORY2	<input checked="" type="checkbox"/>	Active	None

Wrap-Up

Create subinventories using the steps above in NCFS.

Additional Resources

Virtual Instructor-Led Training (vILT)

- INV 101: Inventory Agency Manager (ILT)
- INV 105: Warehouse Management (ILT)