

# **CREATE SUBINVENTORIES**

**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**).

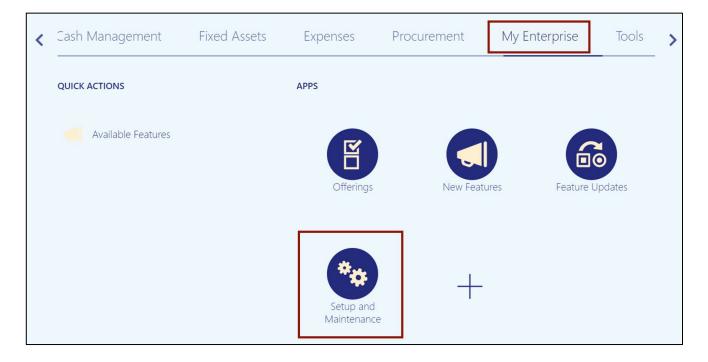
### Introduction and Overview

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.





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

Setup: Financials	▼ ☴ (?) Financials			
Latest Export SReady for a	<sup>d</sup> Manufacturing and Supply	/ Chain Materials Mar	nagement validation 11/1/22 4:48 AM	
Functional Areas	Procurement Product Management		asks	
* Initial Users	1 Toddot Managomont	Shared	Initial Users	
* Enterprise Profile		Shared	View - Format - Freeze Detach - Wrap Show Required Tasks	-
* Legal Structures		Shared	Task	Sco
* Financial Reporting Str	ructures	Shared	Run User and Roles Synchronization Process	
* General Ledger			Columns Hidden 4	
* Organization Structure	s	Shared		
* Resources		•		

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

* Financial Reporting Structures	Shared	View 🔻 Format 👻 🏢 Freeze 🚔 Detach 📣 Wrap Show All Tasks 🗸
* Organization Structures	Shared	Task Scope
* Customers	Shared	Manage Inventory Profile Options
* Suppliers	Shared	Manage Inventory Lookups
		Manage Inventory Value Sets
* Facilities	°¢ 🔽	Manage Inventory Descriptive Flexfields Manage Inventory Account Alias Key Flexfield
* Users and Security	Shared	Manage Inventory Locator Key Flexfield
* Items	Shared	Manage Inventory Transaction Sources and Types
Carriers and Transit Times		Manage Material Statuses
* Catalogs	Shared	Manage Subinventories and Locators
Inventory Management		Manage ABC Classes
		Columns Hidden 4
Receiving	Shared	
* Shipping		



5. Click Manage Subinventories and Locators.

* Financial Reporting Structures	Shared	View 🔻 Format 👻 🥅 Freeze 📓 Detach 🚽 Wrap Show All Tasks 🗸
* Organization Structures	Shared	Task Scope
* Customers	Shared	Manage Inventory Profile Options
* Suppliers	Shared	Manage Inventory Lookups
	Shared	Manage Inventory Value Sets
* Facilities	°* 🤛	Manage Inventory Descriptive Flexfields
* Users and Security	Shared	Manage Inventory Account Alias Key Flexfield
* Items	Shared	Manage Inventory Locator Key Flexfield
Carriers and Transit Times		Manage Inventory Transaction Sources and Types
Gamers and manarchines		Manage Material Statuses
* Catalogs	Shared	Manage Subinventories and Locators
Inventory Management		Manage ABC Classes
Receiving	Shared	Columns Hidden 4
* Shipping		
Shipping		

6. Select the required *Organization*.

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

Select Organization ★ * Organization B8SITORG2	* Organization β8SITORG2 ▼		
		Select Organization	×
O <u>K</u> <u>C</u> ancel	O <u>K</u> <u>C</u> ancel	* Organization [38SITORG2	•
			O <u>K</u> <u>C</u> ancel



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

Manage Subiny	ventories 🤊					Inventory Org	anization	38SITORG	2 <b>Ch</b>	ange Organiza	tion	D <u>o</u> ne
▲ Search												
Subinventory	Equals ~				Subinventory Type	Equals 🗸	~					
Description	Equals ~				Material Status	Active			•			
Locator Control	Equals V	~										
								Search	Reset	Add Fields	▼ Reo	order
Search Results												
Actions 🔻 View 👻	+ / 理	Manage Item Subinventories	Manage Loc	ators								
Subinventory	Description				Active	Material Status	Locator		Subinve Type		Addition nformati	
4												•

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

eate Subinve	ntory ⑦		Save and Close <
Immary			
* Subinventory	SITSUBINV	Picking Order	
Description	SIT SUBINVENTORY2		Asset subinventory
End Date	m/d/yy		Quantity tracked
* Material Status	Active		PAR location
Subinventory Type	Storage V	Subinventory Group	<b>•</b>
Locator Control		Replenishment Count Method	Count 🗸
Location	B100COSMETICNI-121 EDINBURGH SOUTH DRIVE STE 209	Default Replenishment Count Type	Order par 🗸 🗸
Locator Structure	Four-Segment Locator Structure Instance ~	Source Type	~



9. Click the Save and Close button.

Create Subinve	ntory ⑦		Save and Close  Cancel
Summary			
* Subinventory	SITSUBINV	Picking Order	
Description	SIT SUBINVENTORY2		Asset subinventory
			Depreciable
End Date	m/d/yy		Quantity tracked
* Material Status	Active		PAR location
Subinventory Type	Storage 🗸	Subinventory Group	<b>•</b>
Locator Control	None ~	Replenishment Count Method	Count ~
Location	₿100COSMETICNI-121 EDINBURGH SOUTH DRIVE STE 209		
Locator Structure	Four-Segment Locator Structure Instance V	berault represissiment count type	

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

Manage Item Subinventories       Manage	Confirmation Your changes were sa		Inventory Orga	anization 38SITC
	A	ctive	Material Status	Locator Contro
TORY2		9	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)

