

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**).

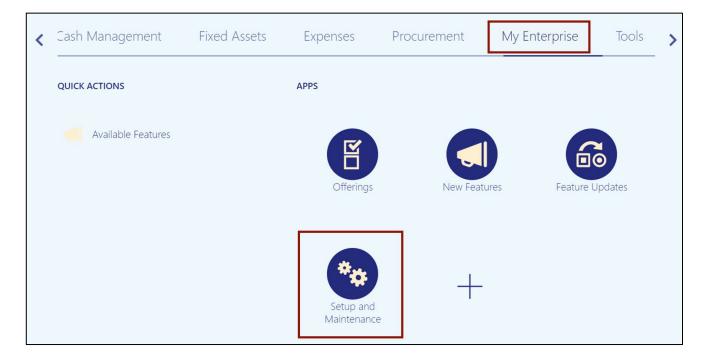
Introduction and Overview

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	^d 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 Ch	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	•
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	•
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)

