

Inventory Items

Introduction

Inventory Items can be configured in NCFS to allow DHHS and DAC users in the **NC Warehouse Purchaser** group to track inventory purchases using the **Item ID** and **Warehouse ID** fields in NC eProcurement. Purchases using these fields will be transmitted to NCFS and will update the *on-order* inventory level within the NCFS inventory module.

Once the goods are physically received, and a receipt is entered into NC eProcurement and processed through NCFS, the *on-hand* inventory level within NCFS will be updated.



Learning Objectives

At the end of this job aid, **you will be able to:**



Understand how to find Inventory Items in Expert View.



Understand how to find Inventory Items in Guided Buying.

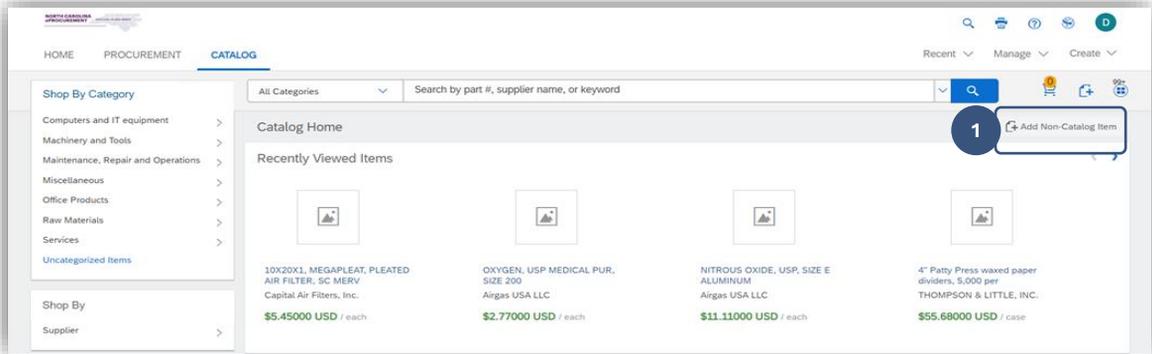


Create Change Orders in both Expert View and Guided Buying.

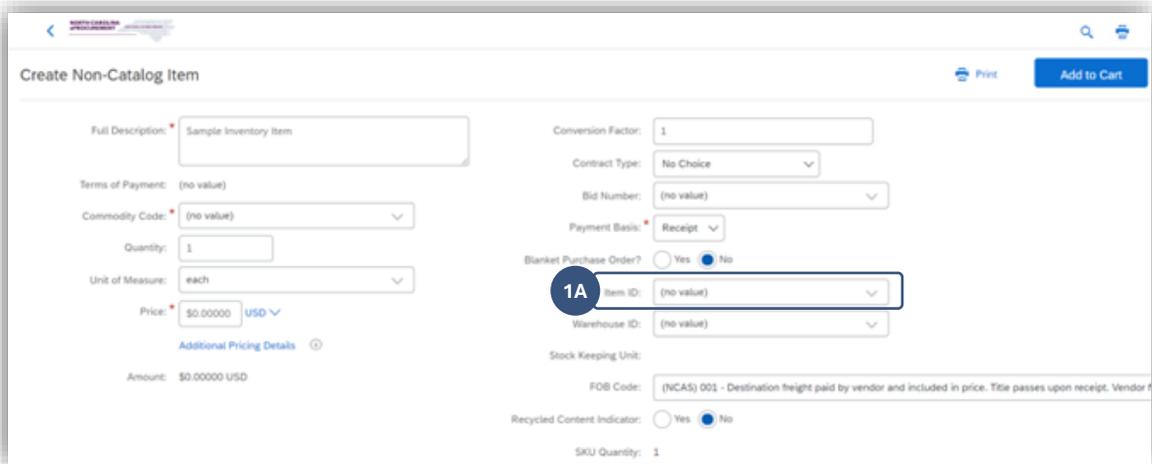
Inventory Items

Inventory Items in Expert View

- 1 From the **Catalog** tab in Expert View, click the **Add-Non Catalog Item** button to start creating an inventory item.



A. Add an **Item ID** to the line item by using the drop-down arrows and selecting **Search more**.



B. The following fields will automatically populate based on the selected **Item ID** values:

- **Warehouse ID** – This field defaults based on the Item ID and is not editable.
- **Stock Keeping Unit** – Inventory items are replenished using a Stock Keeping Unit (SKU). This field defaults based on the Item ID and is not editable.
- **Accounting fields** – Once populated, these fields – Agency, Budget Fund, Natural Account, Agency Management Unit, Agency Program, Funding Source, Project, and Inter-fund – are editable by the user.

If the accounting fields are set as a default value in the user's profile, the inventory item will not overwrite the user's chosen preferences. It will, however, populate any remaining non-defaulted accounting fields. If the user does not have a default value set in their profile, the selection of the inventory item will default the appropriate NCFS values.

If a user has manually entered a value in any of the above fields before the **Item ID** has been selected, or if they are editing a catalog line item, the default values will not overwrite the user-entered values.

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C. The following fields will need to be populated with the correct information to match the **Item ID** field:

- **Full Description** – a detailed explanation of the item.
- **Commodity Code** – the appropriate 6-digit UNSPSC Commodity Code.
- **Price** – the cost based on Unit of Measure.
- **Unit of Measure** – the unit the item(s) are sent from the supplier.
- **SKU Quantity** – This field is equal to the **Conversion Factor** multiplied by the **Quantity**. This field is not editable.



Example: The SKU quantity for an **Item ID** is **each**, but the **Unit of Measure** on a catalog line item is **box**. The **Conversion Factor** would be the number of items in the box.

- Select a **Supplier** using the drop-down menu if necessary. If the desired supplier is not displayed in the previous choices, click **Search for more...** to select the appropriate supplier.
- The **Location** field automatically populates when a Supplier is selected. To change the default Location, click the **Select** link to the right of the field.
- Adjust the quantity in the **Quantity** field if necessary.



The **Item ID**, **Warehouse ID**, **Stock Keeping Unit**, **Conversion Factor**, and **SKU Quantity** fields are not editable via the Mass Edit process.



Shipping/Freight charges should be included as a separate line item on the RQ using the freight commodity code, **781018 – Road cargo transport**. This commodity code will exempt the supplier from the 1.75% transaction fee on shipping.

Choose Value for Item ID

Found more than 500 items. The results shown here include unique items from the first 500 items found.

Name Search

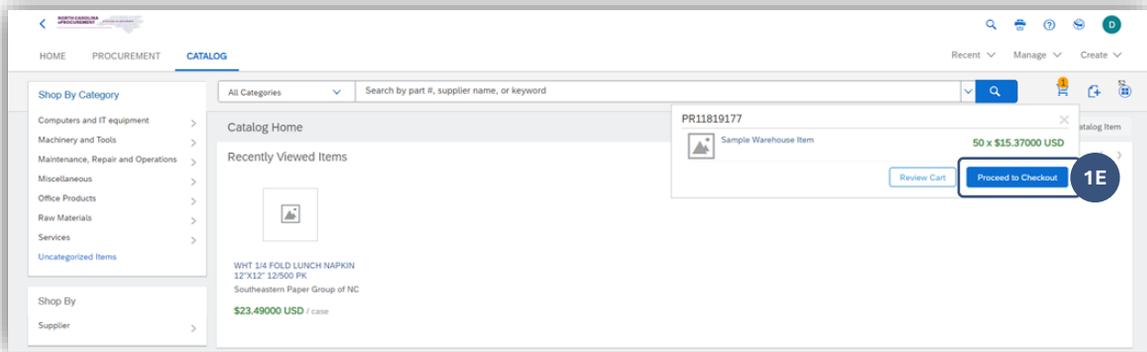
Item ID	Name	Description	Unit of Measure	Commodity Code	Default Cost	Company	Cost Center	Account	Select
190001857	0001857	PRISON CELL BLOCK LOCKS, HEAVY DUTY, KEYED BOTH SIDES. FOLDGER-ADAMS CAT.#86.	EA	450-55	\$129.55000 USD	1901	11301116	533800014	Select
190001860	0001860	DIETETIC GREEN BEANS, 6#10 CANS/CASE	CS	393-47	\$15.37000 USD	1901	11301116	533800016	Select
190001861	0001861	DIETETIC CARROTS, 6#10 CANS/CASE	CS	393-47	\$13.93060 USD	1901	11301116	533800016	Select
190001862	0001862	DIETETIC BEETS, 6#10 CANS/CASE	CS	393-47	\$20.67000 USD	1901	11301116	533800016	Select
190001863	0001863	THERAPEUTIC GREEN PEAS, 6#10 CANS/CASE	CS	393-86	\$0.00000 USD	1901	11301116	533800016	Select
190001864	0001864	TOMATOES, LOW SODIUM, 24#303 CANS/CASE	CS	393-86	\$11.41540 USD	1901	11301116	533800016	Select
190001865	0001865	GRAPEFRUIT JUICE, UNSWEETENED, 12/46 OZ CANS/CASE QUALITY GRADE TO BE FANCY. USDA CERTIFICATE OF QUALITY AND CONDITION REQUIRED.	CS	393-60	\$0.03670 USD	1901	11301116	533800016	Select
190001866	0001866	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE GRADE A. USDA CERTIFICATE OF QUALITY AND CONDITION REQUIRED. PRODUCT MUST BE OF THE LATEST SEASON'S PACK. EACH CONTAINER AND CASE MUST BE PLAINLY LABELED TO IDENTIFY CONTENTS.	CS	393-60	\$20.62000 USD	1901	11301116	533800016	Select
190001867	0001867	APPLE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE USDA GRADE A EQUIVALENT. CERTIFICATE OF QUALITY AND CONDITION REQUIRED. EACH CONTAINER AND CASE MUST BE PLAINLY LABELED TO IDENTIFY CONTENTS.	CS	393-60	\$15.83450 USD	1901	11301116	533800016	Select
190001868	0001868	V-8 JUICE, LOW SODIUM, 48/5-1/2 OZ CANS/CASE MUST PROVIDE A MFG. CERTIFICATE THAT MEETS OR EXCEEDS USDA GRADE A STANDARDS. SODIUM CONTENT NOT TO EXCEED 95 MG PER 5.5 FL OZ SERVING EACH CONTAINER AND CASE MUST BE PLAINLY LABELED TO IDENTIFY CONTENTS.	CS	393-60	\$26.75000 USD	1901	11301116	533800016	Select
		CRANBERRY COCKTAIL JUICE, 12/46 OZ CANS/CASE QUALITY							Select

Inventory Items

D. Click **Add to Cart** to go back to the Catalog.

E. Add additional line items to the cart if needed, then click **Proceed to Checkout** to reach the RQ Summary page.

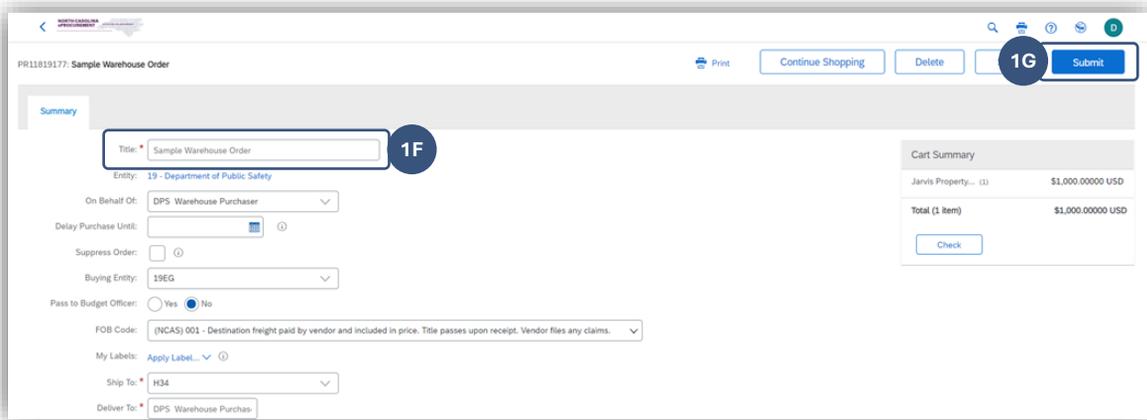
Select the shopping cart icon to display all line items currently in the cart, and to reveal the **Proceed to Checkout** button.



F. On the Summary page, add a **Title** to the RQ.

To prevent errors in the event of a change order, it is recommended that inventory and non-inventory items are entered on separate RQs.

G. After reviewing the RQ details for any incorrect information, click **Submit**.



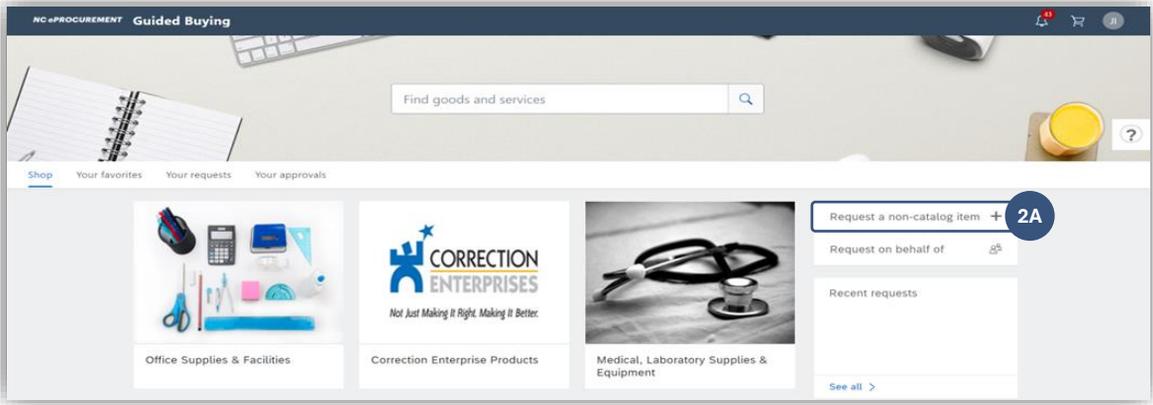
Inventory Items

Inventory Items in Guided Buying

2

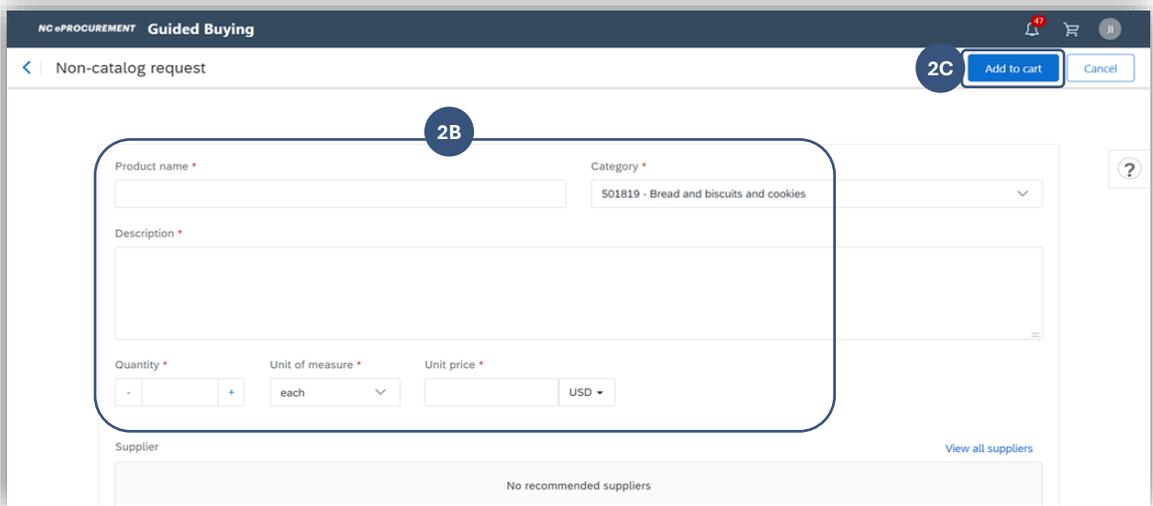
Inventory items may also be created in Guided Buying. Requisitions (RQs) created in either view will be visible in both views.

A. From the Guided Buying landing page, click **Request a non-catalog item**.

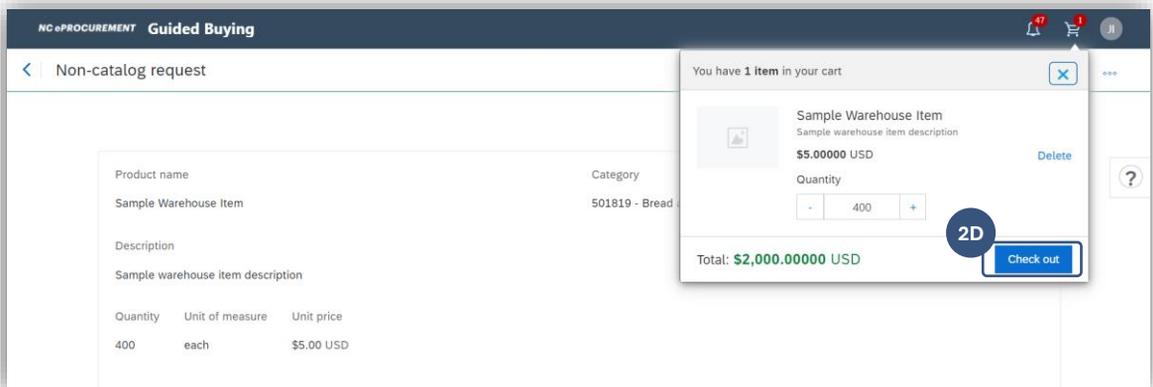


B. On the **Non-catalog request** page, add in the required line item details.

C. Click **Add to cart** to add this line item to the shopping cart in Guided Buying.



D. To add more items to your cart before checking out, use the back arrow to go to the Guided Buying landing page and continue shopping. Click **Check out** to go to the Summary page.



Inventory Items

E. On the Summary page, click the arrows to expand sections and access more fields.

NC#PROCUREMENT Guided Buying

Sample Warehouse Item
Checkout / PR11819263

Send request Save and exit

Ship to Manage locations Charge to Manage details Total Cost \$2,000.00000 USD
NC DEPARTMENT OF PUBLIC SAFETY Jacksonville, NC 28540-0370 United States Company (1901) Net Amount \$2,000.00000 USD

2E Show advanced options

Items (1)

Quantity	Price	Net Amount
400	5 USD	\$2,000.00000 USD

2E

Sample Warehouse Item
North Carolina Department of Public Safety

Unit of Measure: each

Gross Amount: \$2,000.00000 USD

Name: Sample Warehouse Item
Supplier: North Carolina Department of Public Safety
Description: Sample warehouse item description
Location: CORRECTION ENTERPRISES
4240 MAIL SERVICE CENTER ENTERPRISES
ADMINISTRATION RALEIGH, NC 27699-4240 United States
Supplier Part Number
Supplier Auxiliary Part ID

F. After expanding the sections for the inventory line item, scroll down to the **Others** section and expand it to see the **Item ID** field.

G. Click the drop-down arrow and use **Browse all** to add values to the **Item ID** field.

NC#PROCUREMENT Guided Buying

Sample Warehouse Item
Checkout / PR11819263

Total Cost \$2,000.00000 USD Send request Save and exit

> Accounting Company (1901)
> Shipping NC DEPARTMENT OF PUBLIC SAFETY, Jacksonville
> Comments
> Attachments
2F Others

Terms of Payment: N30
Contract: (no value)
Contract Type: No Choice
Payment Basis: Receipt
Item ID: (no value) 2G

Commodity Code: 501819 - Bread and biscuits and cookies
Conversion Factor: 1
Bid Number: (no value)
Blanket Purchase Order?: No
Warehouse ID: (no value)
FOB Code: (NCAS) 001 - Destination freight paid ...
SKU Quantity: 400

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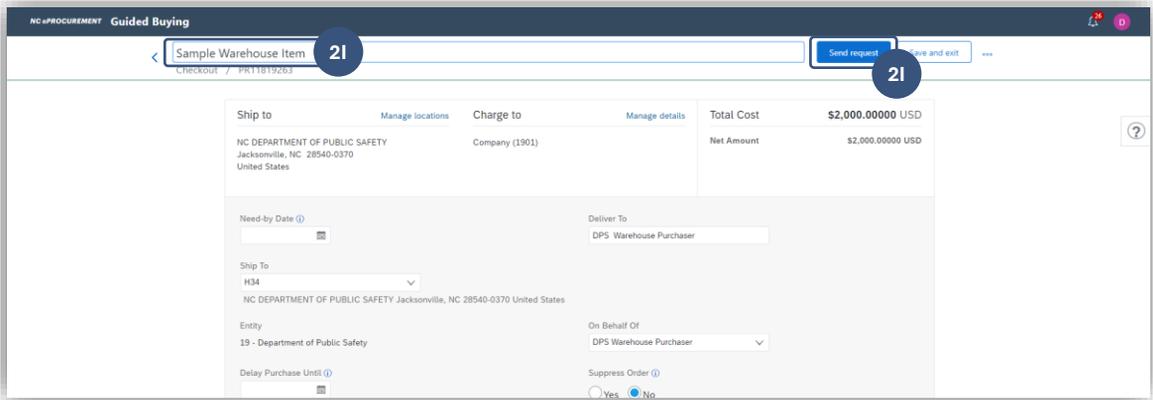
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Shipping/Freight charges should be included as a separate line item on the RQ using the freight commodity code, **781018 – Road cargo transport**. This commodity code will exempt the supplier from the 1.75% transaction fee on shipping.

Inventory Items

- I. Adjust the **Title** of the Summary page if necessary by clicking on the field and entering a new title. After reviewing the RQ details for any other incorrect information, click **Submit**.

To prevent errors in the event of a change order, it is recommended that inventory and non-inventory items are entered on separate RQs.

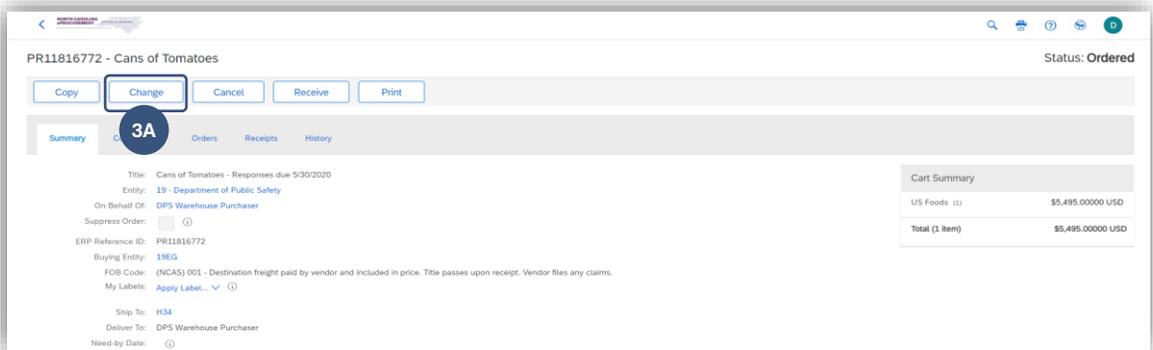


Change Orders for Inventory Items in Expert View

- 3 Change orders can be created to decrease the quantity of Inventory Items.

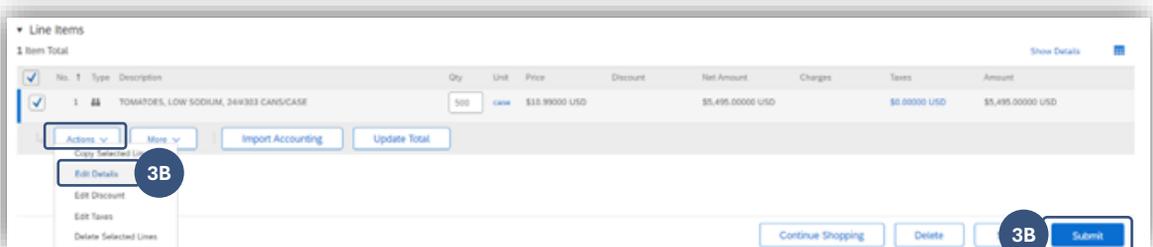
Adding new Inventory Items to an existing inventory order or increasing the quantity of an existing Inventory Item will cause the Change Order to fail validation within NCFs. A new Requisition (RQ) should be created if additional Inventory Items are required.

- A. Search for the RQ and click the **Change** button to initiate a Change Order.



- B. The quantity can be decreased directly from the **Summary** page or by clicking the **Edit Details** link in the **Actions** drop-down. Click **Submit** when edits are complete.

Receiving and invoicing status rules still apply. Please see the **Receiving** job aid for details.



Inventory Items

Change Orders for Inventory Items in Guided Buying

- 4 Change orders can be created to decrease the quantity of Inventory Items. Adding new Inventory Items to an existing inventory order or increasing the quantity of an existing Inventory Item will cause the Change Order to fail validation within NCFs. A new requisition (RQ) should be created if additional Inventory Items are required.

There is no system search in Guided Buying. If a Change needs to be made for a RQ created by another requester, then first navigate to Expert View and use the search options available in that view.

A. Find or search for the RQ on the **Your Requests** tab and click the **Change request** button.

Ship to	Charge to	Total Cost	Net Amount
NC DEPARTMENT OF PUBLIC SAFETY Jacksonville, NC 28540-0370 United States	Company (1901)	\$5,495.00000 USD	\$5,495.00000 USD

Item	Quantity	Price	Net Amount
TOMATOES, LOW SODIUM, 24#/303 CANS/CASE US Foods	500	\$10.99000 USD	\$5,495.00000 USD

B. The quantity can be decreased directly from the **Summary** page. Other fields may be edited by expanding each section as needed. Click **Submit** when all edits are complete.

Receiving and invoicing status rules still apply. Please see the **Receiving** job aid for details.

Ship to	Charge to	Total Cost	Net Amount
NC DEPARTMENT OF PUBLIC SAFETY Jacksonville, NC 28540-0370 United States	Company (1901)	\$5,495.00000 USD	\$5,495.00000 USD

Item	Quantity	Price	Net Amount
TOMATOES, LOW SODIUM, 24#/303 CANS/CASE US Foods	500	\$10.99000 USD	\$5,495.00000 USD