

# NC eProcurement

## Inventory Items

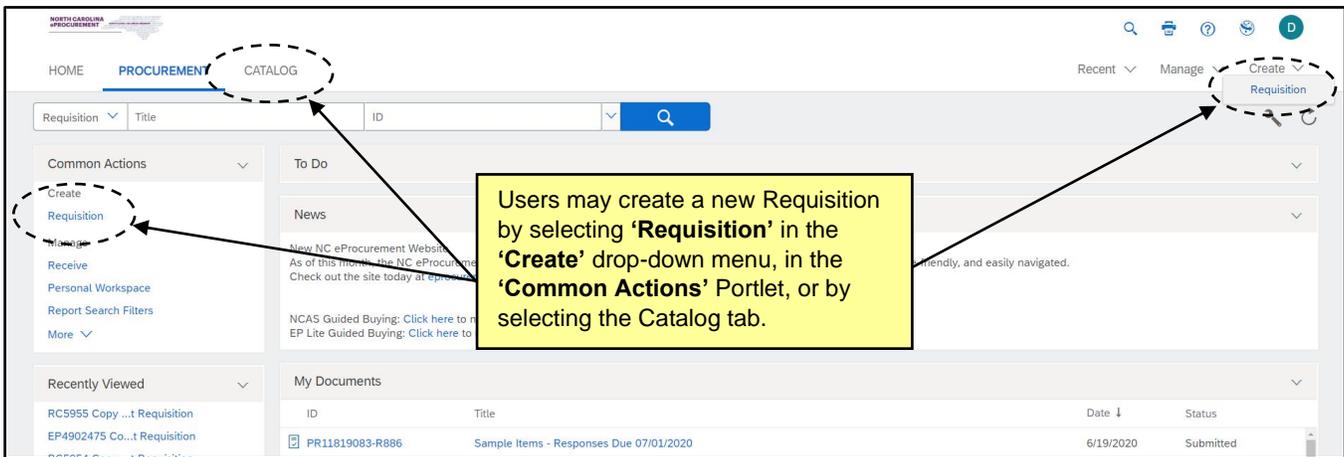
STATE DEPARTMENT STATE BRANCH  
LOCAL GOVERNMENT CITY COUNTY  
COMMUNITY COLLEGE PUBLIC SCHOOLS  
**NORTH CAROLINA ePROCUREMENT PURCHASER**  
ONLINE SHOPPING STATEWIDE TERM CONTRACTS  
ELECTRONIC VENDOR PORTAL HUB CERTIFIED VENDOR  
QUOTE PUNCHOUT CATALOG  
PURCHASE ORDER  
SOURCING  
BIDDING  
BUY

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.

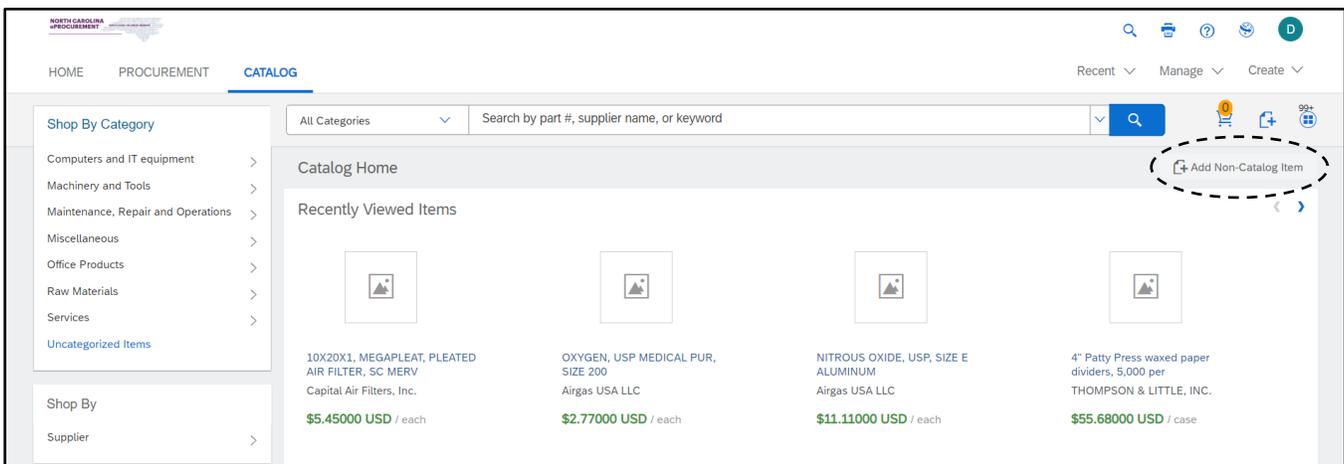
Once the goods are physically received, and a receipt is entered into NC eProcurement and processed through NCFS, the *on-hand* inventory level within NCFS will be updated.

### I. Inventory Items in Expert View

1. From the NC eProcurement Procurement tab, click **'Requisition'** from the **'Create'** Shortcut Menu on the Menu Bar the **'Common Actions'** Portlet, or select the Catalog tab, to start creating the requisition (RQ).



2. Click the **'Add Non-Catalog Item'** button to enter non-catalog information.



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

The screenshot shows the 'Create Non-Catalog Item' form. A yellow callout box with the text 'Enter a valid 'Item ID.' and an arrow points to the 'Item ID' dropdown menu, which is also circled with a dashed line. Other fields include 'Full Description', 'Commodity Code', 'Quantity', 'Unit of Measure', 'Price', 'Amount', 'Conversion Factor', 'Contract Type', 'Bid Number', 'Payment Basis', 'Blanket Purchase Order?', 'Warehouse ID', 'Stock Keeping Unit', 'FOB Code', 'Recycled Content Indicator', and 'SKU Quantity'. A 'Supplier Information' section is at the bottom with a 'Supplier' dropdown.

4. The following fields will automatically populate based on the selected **'Item ID'** values.
  - a. **Warehouse ID** – This field defaults based on the Item ID and is not editable.
  - b. **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.
  - c. **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.

**Note:** 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.

**Note:** 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.

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

- a. **Full Description** – a detailed explanation of the item.
- b. **Commodity Code** – the appropriate 6-digit UNSPSC Commodity Code.
- c. **Price** – the cost based on Unit of Measure.
- d. **Unit of Measure** – the unit the item(s) are sent from the supplier.
- e. **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.

- f. 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.
- g. 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.
- h. Adjust the quantity in the ‘**Quantity**’ field if necessary.

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

**Note:** 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

ID ↑	Name	Description	ItemUoM	Commodity Code	Default Cost	Company	Cost Center	Account	
190001857	0001857	PRISON CELL BLOCK LOCKS, HEAVY DUTY, KEYED BOTH SIDES. FOLDGER-ADAMS CAT. #86.	EA	450-55	\$129.55000 USD	1901	11301116	533800014	<input type="button" value="Select"/>
190001860	0001860	DIETETIC GREEN BEANS, 6#10 CANS/CASE	CS	393-47	\$15.37000 USD	1901	11301116	533800016	<input type="button" value="Select"/>
190001861	0001861	DIETETIC CARROTS, 6#10 CANS/CASE	CS	393-47	\$13.93060 USD	1901	11301116	533800016	<input type="button" value="Select"/>
190001862	0001862	DIETETIC BEETS, 6#10 CANS/CASE	CS	393-47	\$20.67000 USD	1901	11301116	533800016	<input type="button" value="Select"/>
190001863	0001863	THERAPEUTIC GREEN BEANS, 6#10 CANS/CASE	CS	393-86	\$0.00000 USD	1901	11301116	533800016	<input type="button" value="Select"/>
190001864	0001864	TOMATOES, LOW SODIUM, 24#303 CANS/CASE	CS	393-86	\$11.41540 USD	1901	11301116	533800016	<input type="button" value="Select"/>
190001865	0001865	GRAPEFRUIT JUICE, UNSWEETENED, 12/46 OZ CANS/CASE. USDA CERTIFICATE OF QUALITY AND CONDITION REQUIRED.	CS	393-60	\$0.03670 USD	1901	11301116	533800016	<input type="button" value="Select"/>
190001866	0001866	ORANGE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE. USDA CERTIFICATE OF QUALITY AND CONDITION REQUIRED. PRODUCT MUST BE OF THE LATEST CONTAINER AND CASE MUST BE PLAINLY LABELED TO IDENTIFY CONTENTS.				1901	11301116	533800016	<input type="button" value="Select"/>
190001867	0001867	APPLE JUICE, UNSWEETENED, 12/46 OZ CANS/CASE. USDA CERTIFICATE OF QUALITY AND CONDITION REQUIRED. EACH CONTAINER AND CASE MUST BE PLAINLY LABELED TO IDENTIFY CONTENTS.				1901	11301116	533800016	<input type="button" value="Select"/>
190001868	0001868	V-8 JUICE, LOW SODIUM, 48/5-1/2 OZ CANS/CASE. USDA CERTIFICATE OF QUALITY AND CONDITION REQUIRED. PRODUCT MUST BE OF THE LATEST CONTAINER AND CASE MUST BE PLAINLY LABELED TO IDENTIFY CONTENTS.				1901	11301116	533800016	<input type="button" value="Select"/>
		CRANBERRY COCKTAIL JUICE, 12/46 OZ CANS/CASE QUALITY							

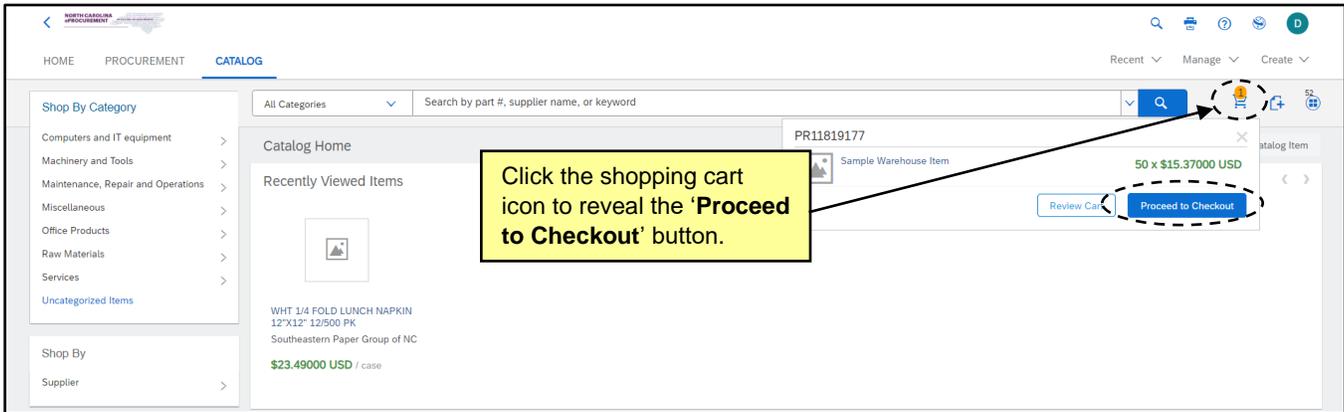
Information from the ‘Item ID’ selection screen can be used to populate the line item.

# NC eProcurement Inventory Items



6. Click **'Add to Cart'** to go back to the Catalog.
7. Add additional line items to the cart if needed, then click **'Proceed to Checkout'** to reach the RQ Summary page.

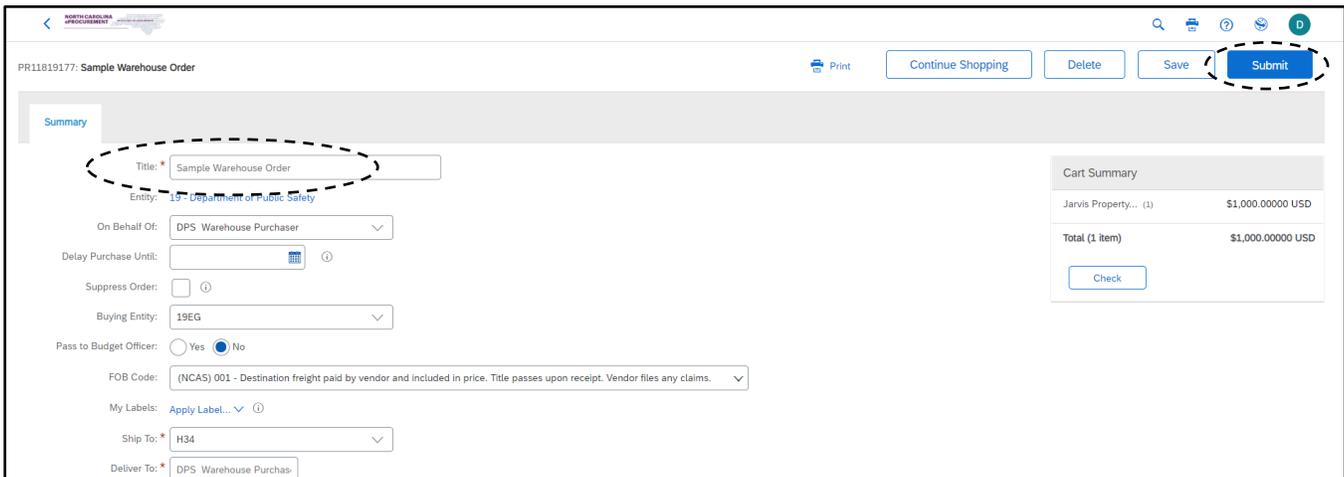
**Note:** Select the shopping cart icon to display all line items currently in the cart, and to reveal the **'Proceed to Checkout'** button.



8. On the Summary page, add a Title to the RQ.

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

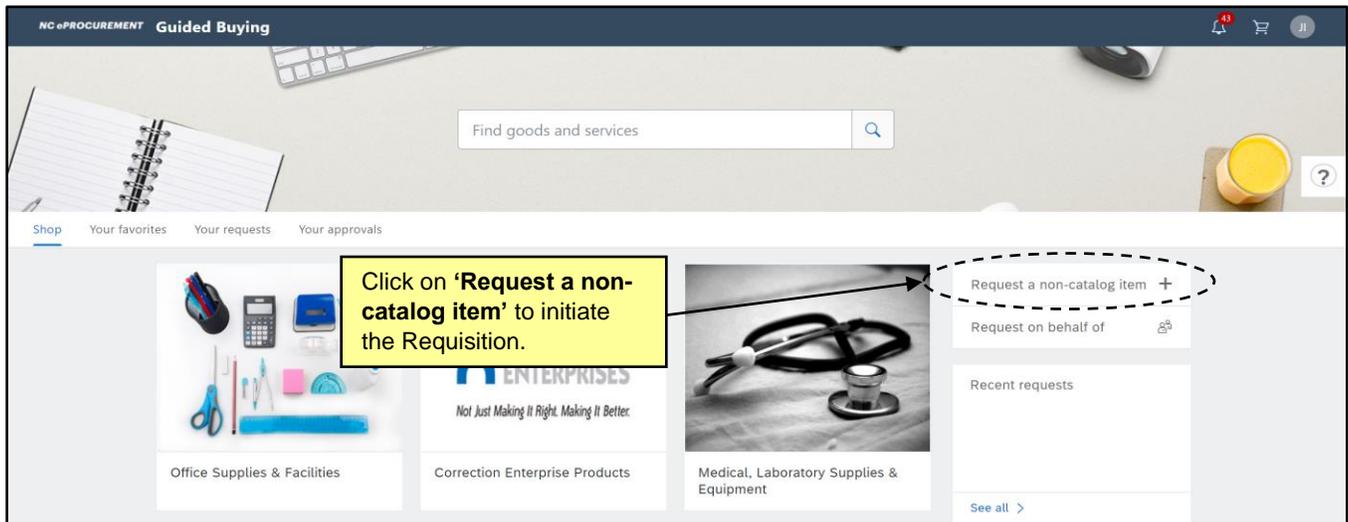
9. After reviewing the RQ details for any incorrect information, click **'Submit.'**



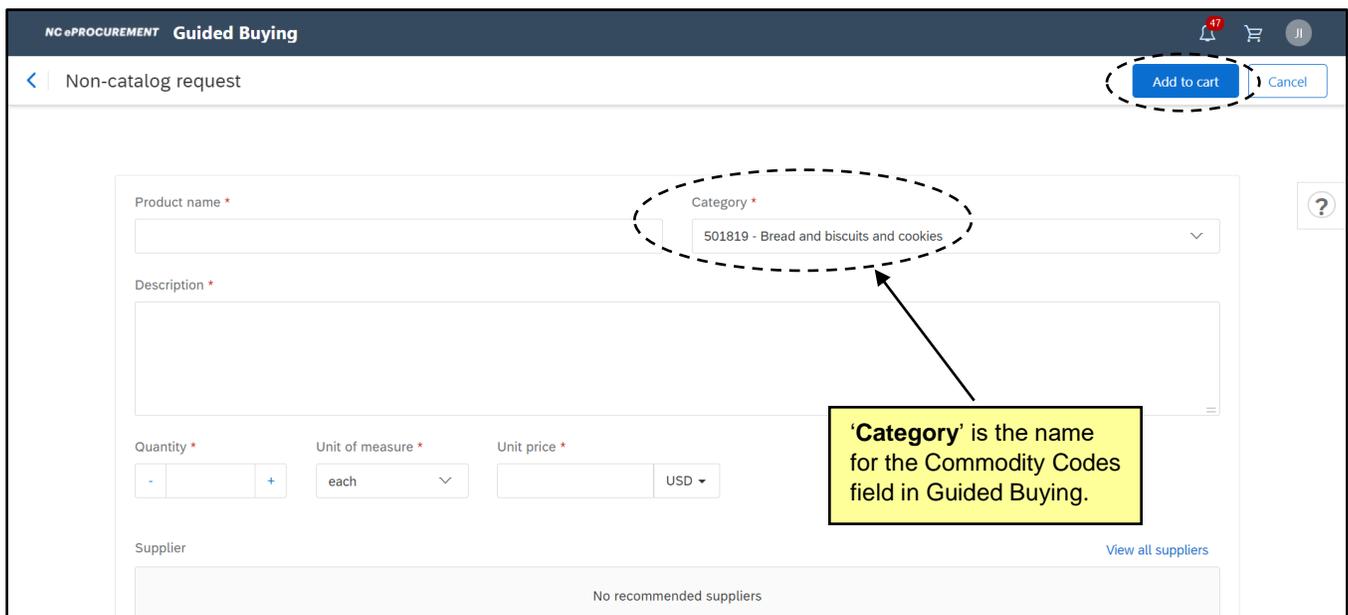
## II. Inventory Items in Guided Buying

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

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

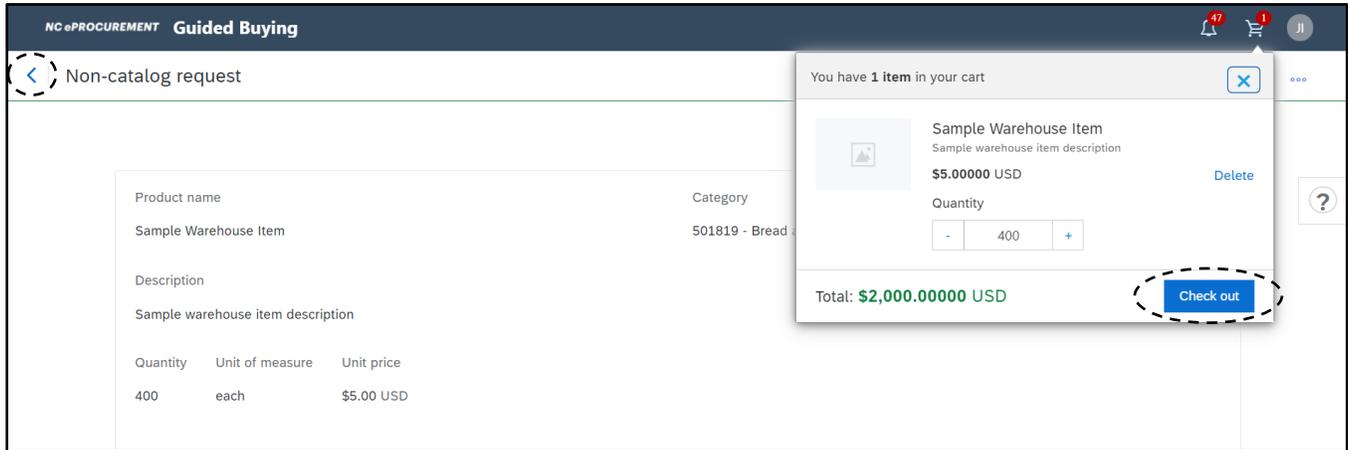


2. On the Non-catalog request page, add in the required line item details.
3. Click **'Add to cart'** to add this line item to the shopping cart in Guided Buying.

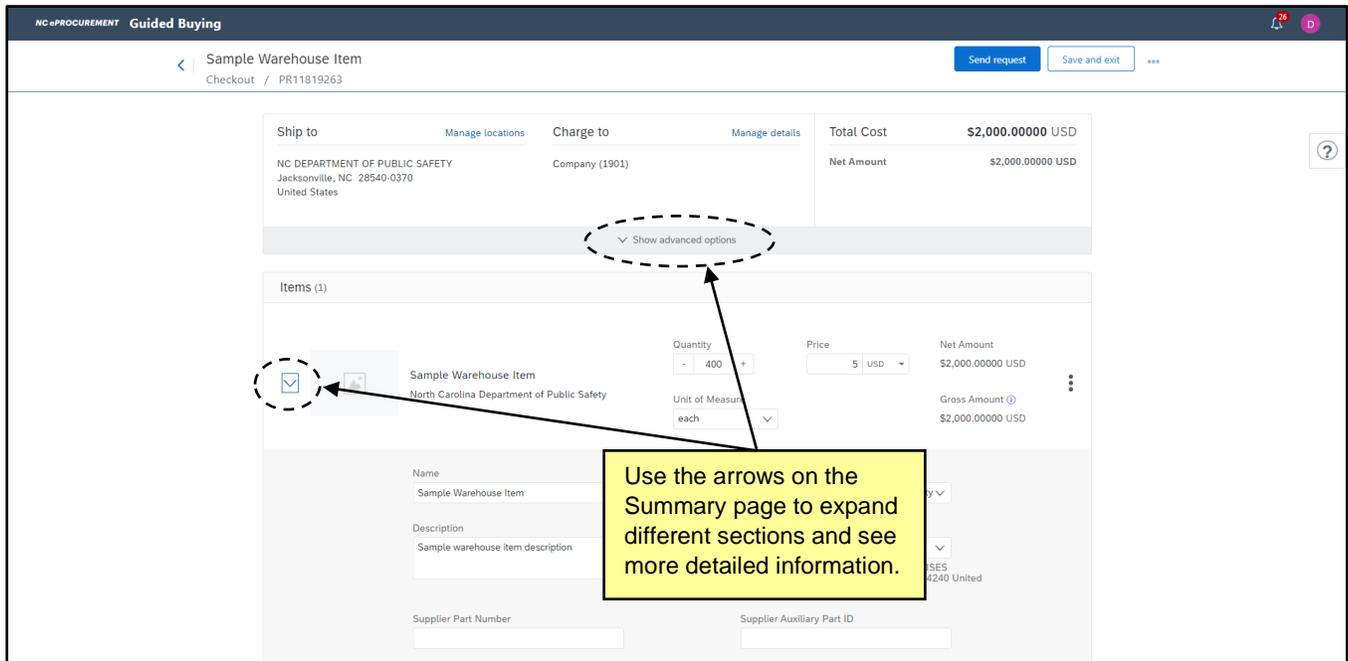


# NC eProcurement Inventory Items

- 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.



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



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

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

The screenshot shows the 'Sample Warehouse Item' form in the NC eProcurement Guided Buying interface. The form is titled 'Sample Warehouse Item' and shows a 'Total Cost' of \$2,000,000.00 USD. The 'Item ID' field is highlighted with a dashed oval, and the 'Others' menu item is also highlighted with a dashed oval. The form includes various fields for accounting, shipping, and contract information, as well as a search for 'Item ID'.

8. The following fields will automatically populate based on the selected **'Item ID'** value.

- 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.

**Note:** 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.

**Note:** 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.

9. The following fields will need to be populated on the line with the correct information to match the **Item ID** by expanding each section as needed.

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

**Example:** The SKU 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.

- f. Select a ‘**Supplier**’ using the drop-down menu if necessary. Use the drop-down menu and click ‘**Browse all**’ to select the appropriate supplier.
- g. The ‘**Location**’ field automatically populates when a Supplier is selected. To change the default Location, click the ‘**Browse all**’ link in the drop-down menu for Location.
- h. Adjust the quantity in the ‘**Quantity**’ field if necessary.

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

10. 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 ‘**Send request.**’

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

The screenshot displays the 'NC ePROCUREMENT Guided Buying' interface. At the top, a text field contains 'Sample Warehouse Item' and a 'Send request' button. Below this, the 'Ship to' section shows 'NC DEPARTMENT OF PUBLIC SAFETY Jacksonville, NC 28540-0370 United States'. The 'Charge to' section shows 'Company (1901)'. The 'Total Cost' is listed as '\$2,000.00000 USD'. A yellow callout box with a black border and text reads: 'Adjust the Title by clicking on the text field on the top of the Summary page. When the RQ is ready to submit, click 'Send request.''. Arrows from the callout box point to the title field and the 'Send request' button.

## III. Change Orders for Inventory Items in Expert View

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.

1. Search for the RQ and click the **'Change'** button to initiate a Change Order.

PR11816772 - Cans of Tomatoes Status: Ordered

Copy **Change** Cancel Receive Print

Summary Collaboration Orders Receipts History

Title: Cans of Tomatoes - Responses due 5/30/2020  
Entity: 19 - Department of Public Safety  
On Behalf Of: DPS Warehouse Purchaser  
Suppress Order:  ⓘ  
ERP Reference ID: PR11816772  
Buying Entity: 19EG  
FOB Code: (NCAS) 001 - Destination freight paid by vendor and included in price. Title passes upon receipt. Vendor files any claims.  
My Labels: Apply Label... ⓘ  
Ship To: H34  
Deliver To: DPS Warehouse Purchaser  
Need-by Date: ⓘ

Cart Summary	
US Foods (1)	\$5,495.00000 USD
<b>Total (1 item)</b>	<b>\$5,495.00000 USD</b>

2. The quantity can be decreased directly from the **'Summary'** page or by clicking the **'Edit Details'** link in the Actions drop-down.

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

Line Items

1 Item Total Show Details

No.	Type	Description	Qty	Unit	Price	Discount	Net Amount	Charges	Taxes	Amount
1		TOMATOES, LOW SODIUM, 24/#303 CANS/CASE	500	Case	\$10.99000 USD		\$5,495.00000 USD		\$0.00000 USD	\$5,495.00000 USD

Actions More Import Accounting Update Total

- Copy Selected Lines
- Edit Details**
- Edit Description
- Edit Charges
- Edit Taxes
- Delete Selected Lines
- Delete Discounts
- Delete Charges
- Delete Taxes

Continue Shopping Delete Save Submit

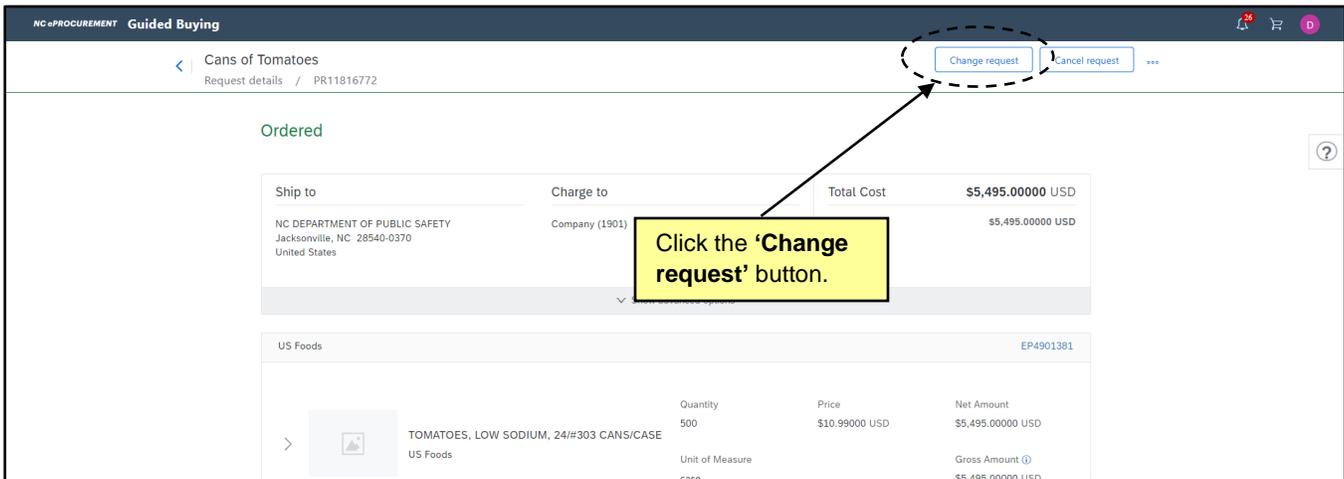
3. Click **'Submit.'**

## IV. Change Orders for Inventory Items in Guided Buying

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.

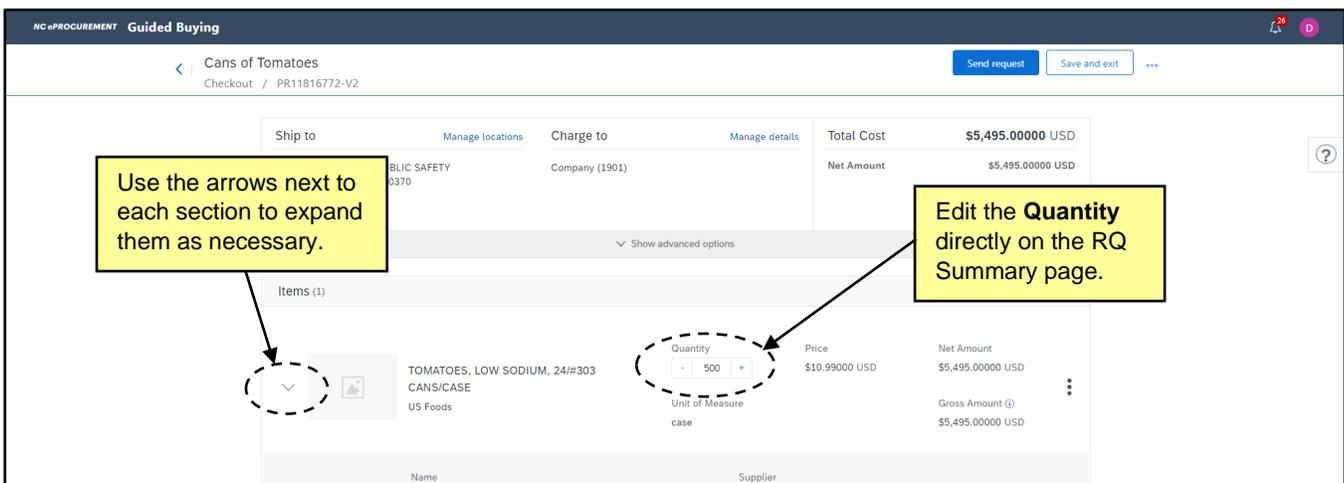
**Note:** There is no system search in Guided Buying. If a Change needs to be made for a RQ created by another requester, then first navigate to Expert View and use the search options available in that view.

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



2. The quantity can be decreased directly from the **'Summary'** page. Other fields may be edited by expanding each section as needed

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



3. Click **'Send Request.'**