MFG-39 Create Freight Items

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of how to **create freight items** in the North Carolina Financial System (**NCFS**).

Introduction and Overview

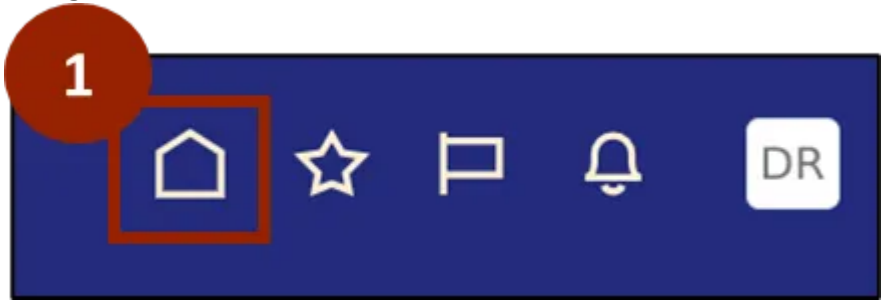
This QRG covers the process for creating a freight item in NCFS.

Create Freight Items

Once logged in to NCFS, follow these steps. There are 36 steps to complete this process.

Step 1. Begin from the Home page, or click the **Home** icon.

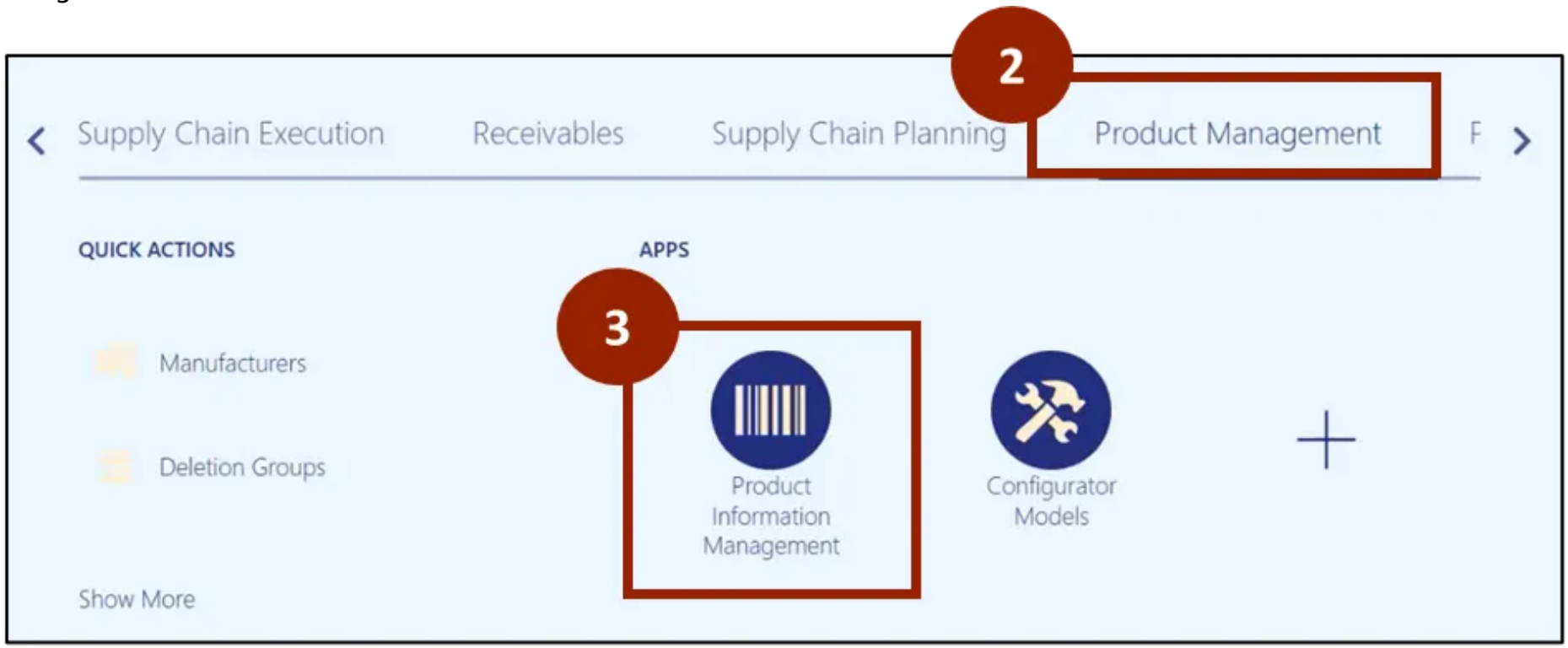
Image



Step 2. On the Home page, select **Product Management.**

Step 3. Within the **Product Management** tab, select **Product Information Management**.

Image



Step 4. Click on the **Task** icon.

Image



Step 5. Under the **Item Management** heading, click **Create Item**.

Image



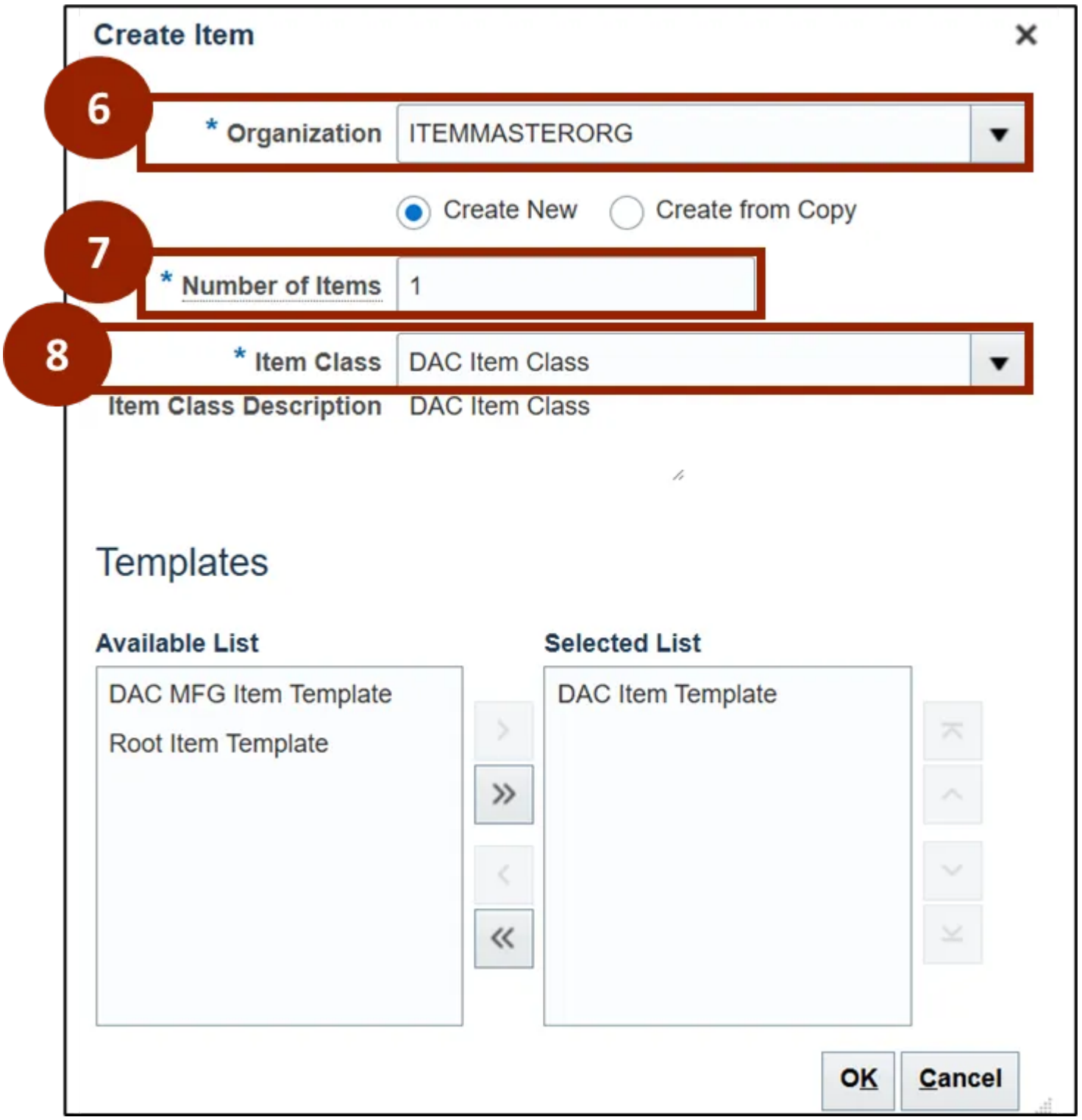
Note: The item is created at the Master Organization (ITEMMASTERORG) level, establishing its primary definition. This ensures all child (inventory) organizations inherit consistent fundamental information.

Step 6. In the **Organization** field, enter **ITEMMASTERORG**.

Step 7. In the **Number of Items** field, enter the **Quantity** required.

Step 8. In the **Item Class** field, enter **DAC Item Class**.

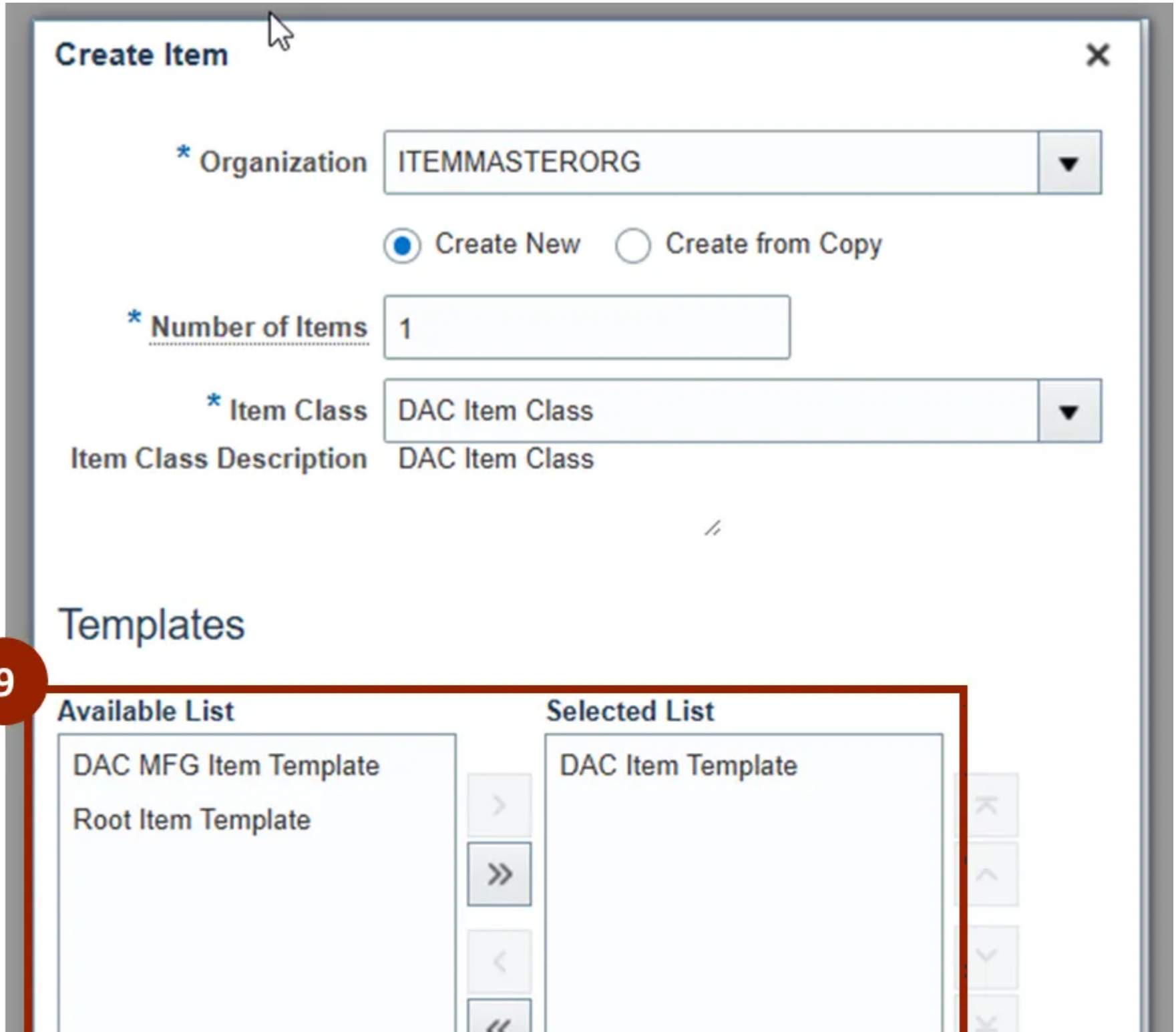
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Create Item
6
* Organization
ITEMMASTERORG
Create New
Create from Copy
7
* Number of Items
1
8
* Item Class
DAC Item Class
Item Class Description
DAC Item Class
Templates
Available List
Selected List
DAC MFG Item Template
Root Item Template
DAC Item Template
OK
Cancel

Step 9. Within the **Templates** section, the Available List displays a list of templates available to apply. The Selected List displays the template selected for this item, defaulted to display **DAC Item Template**.

Step 10. Click the **OK** button.

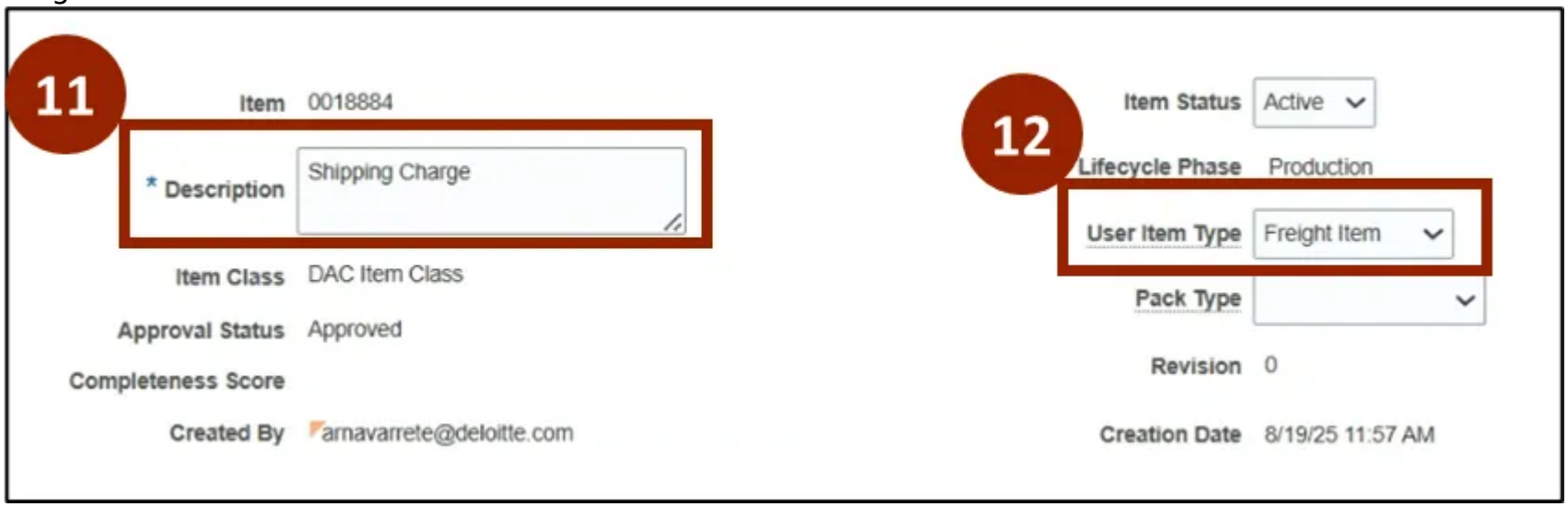
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Create Item
* Organization
ITEMMASTERORG
Create New
Create from Copy
* Number of Items
1
* Item Class
DAC Item Class
Item Class Description
DAC Item Class
Templates
9
Available List
DAC MFG Item Template
Root Item Template
Selected List
DAC Item Template

Step 11. On the **Create Item** screen, enter the **item description** within the **Description** field (e.g., Shipping Charge).

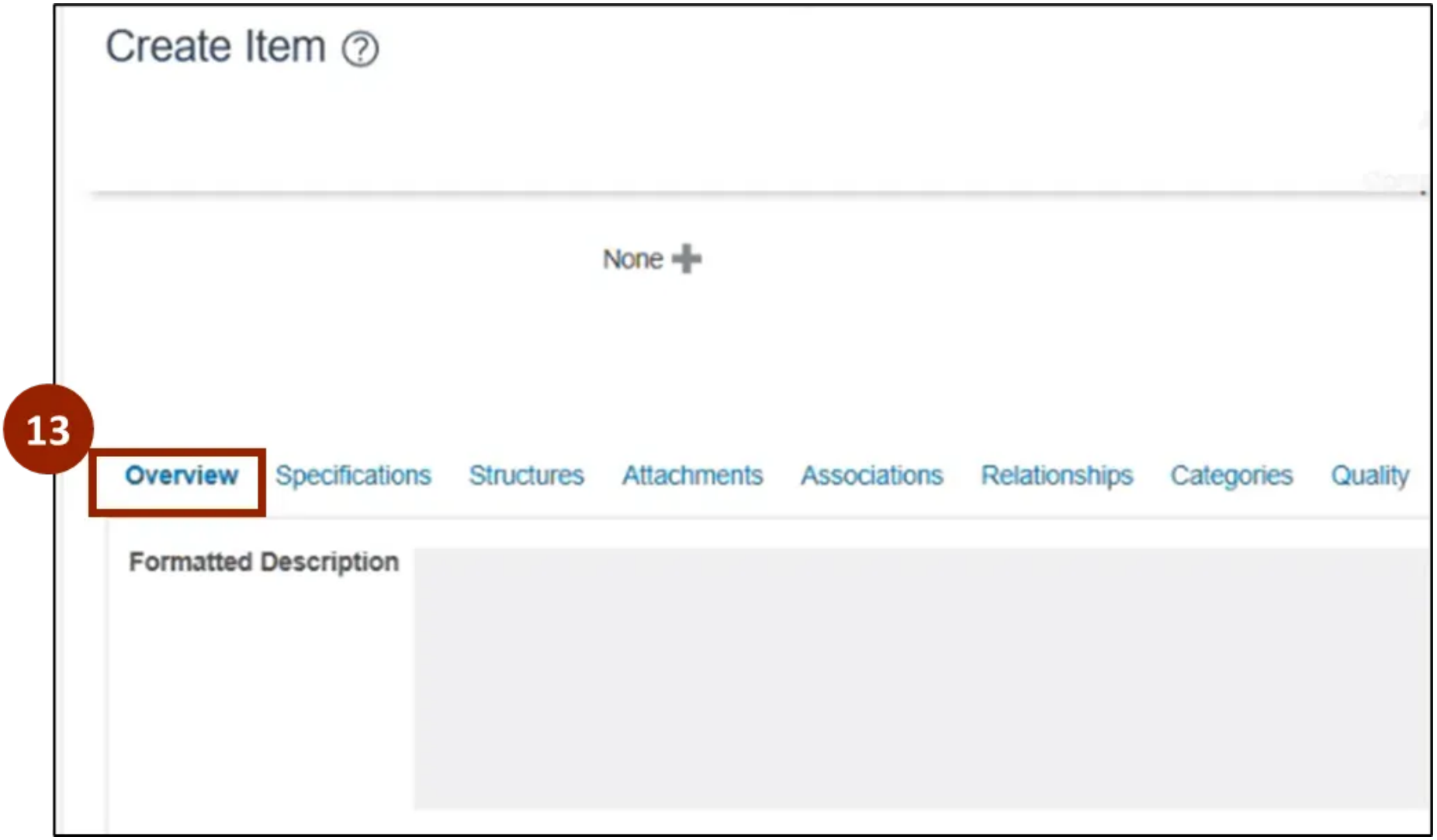
Step 12. From the **User Item Type** drop-down, select **Freight Item**.

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Step 13. On the **Create Item** page, navigate to the **Overview** tab.

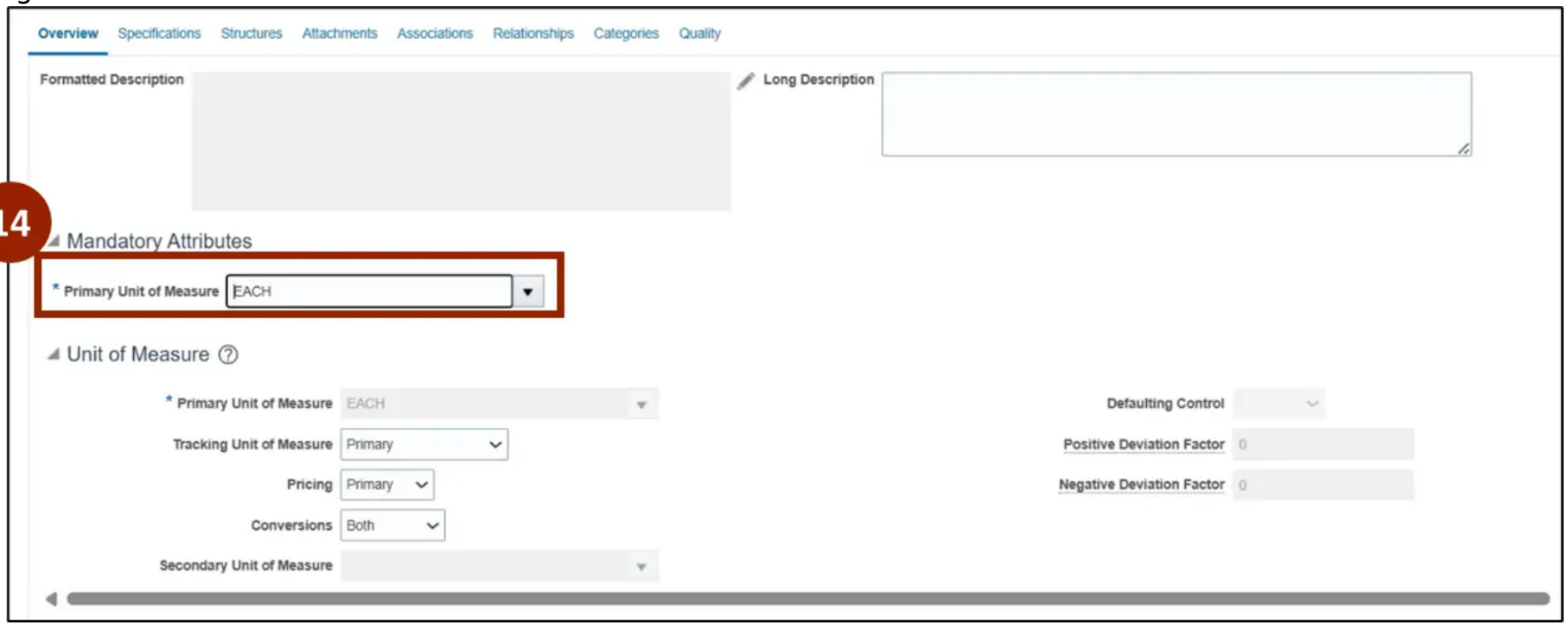
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Step 14. On the **Create Item** page, in the **Primary Unit of Measure** field within the **Mandatory Attributes** section, type **EACH**.

Note: You can also search for the desired Unit of Measure by selecting the drop-down button and performing a search.

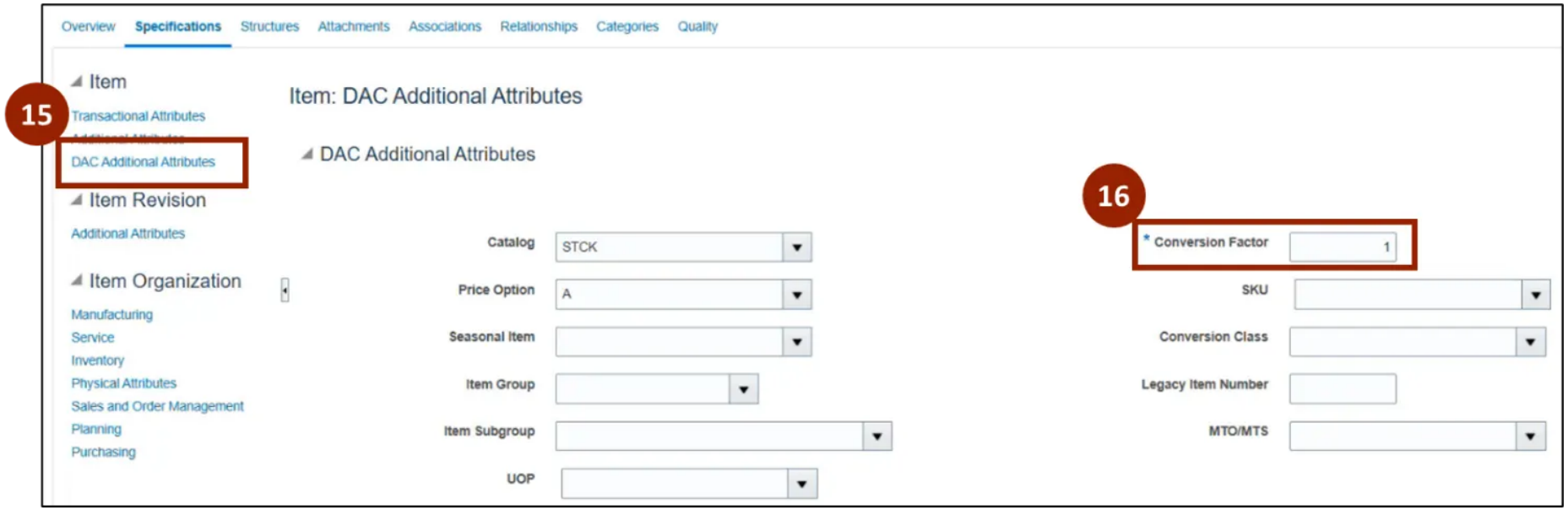
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Step 15. Navigate to the **Specifications** tab and select the **DAC Additional Attributes** link.

Step 16. In the **Conversion Factor** field, type **1**.

Image



Step 17. Under the **Item Organization** section within the **Specifications** tab, select **Inventory**.

Step 18. From the **Inventory Item** drop-down, select **No**.

Step 19. From the **Reservable** drop-down, select **No**.

Image



Step 20. Scroll down to the **Cycle Count** section. From the **Cycle Count Enabled** drop-down, select **No**.

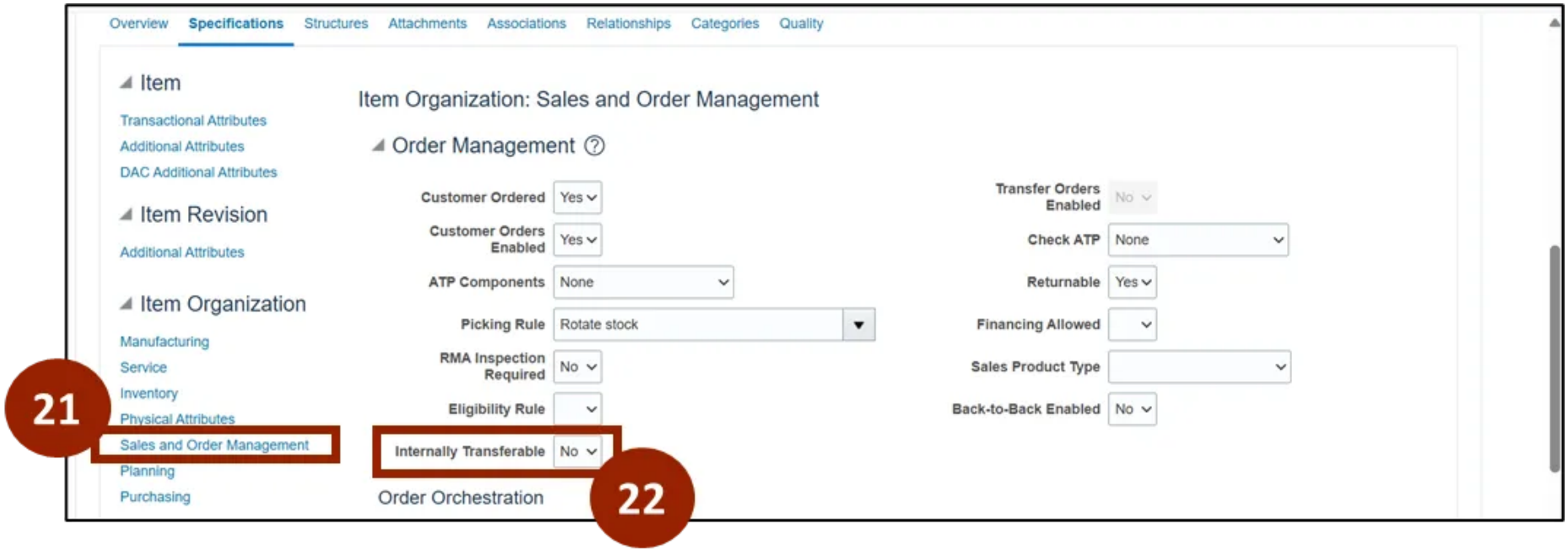
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Step 21. Within the **Item Organization** section, select the **Sales and Order Management** link.

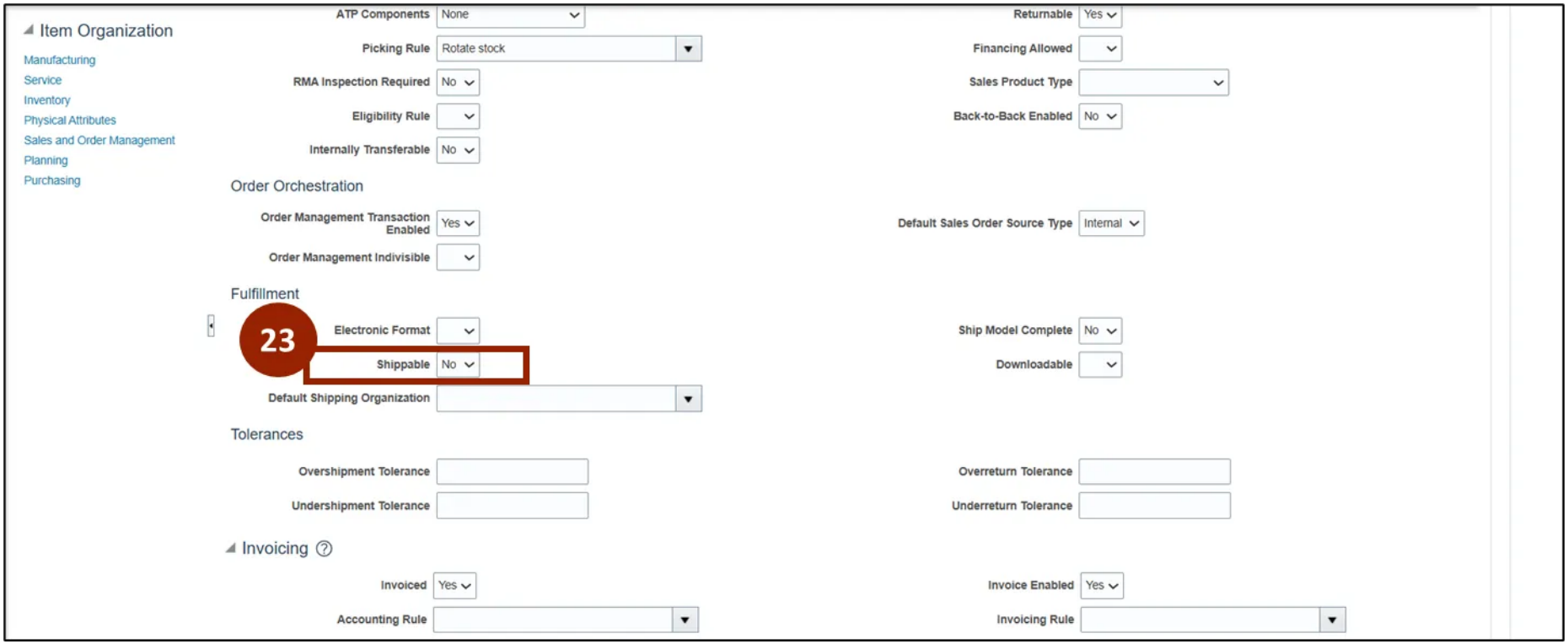
Step 22. From the **Internally Transferabl**e drop-down, select **No**.

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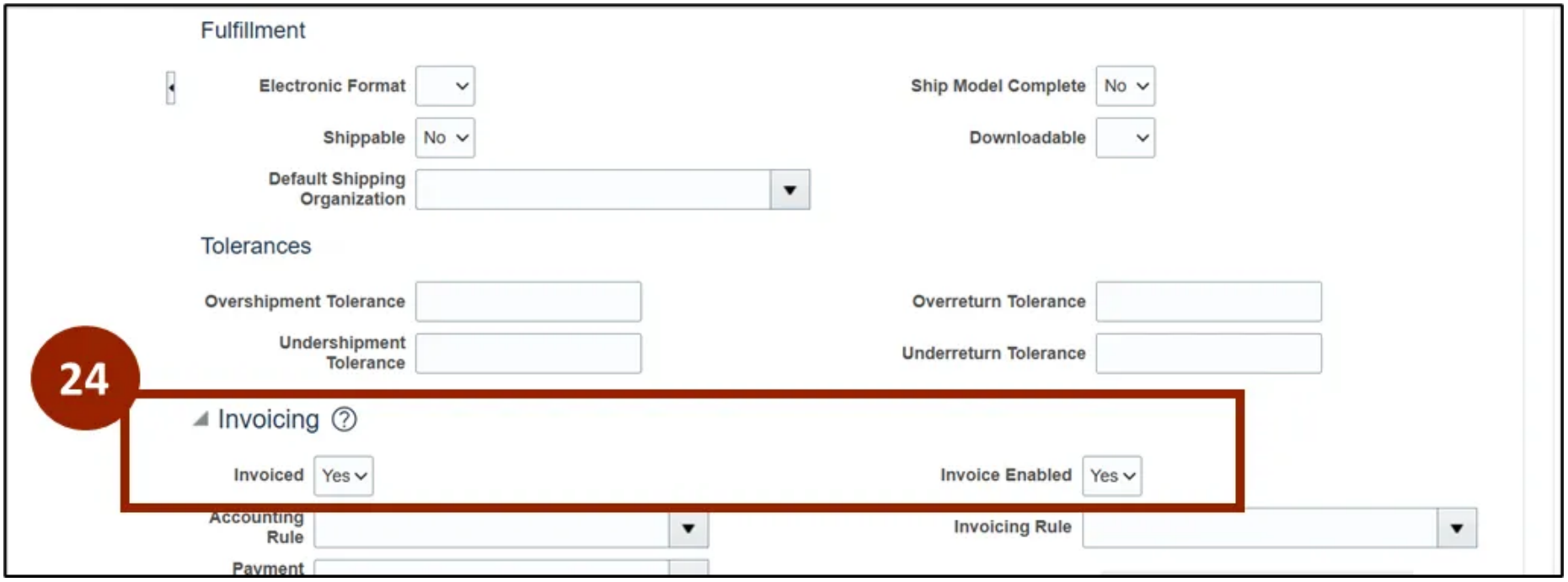
Step 23. From the **Shippable** drop-down within the **Fulfillment** section, select **No**.

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Step 24. Scroll down to the **Invoicing** section. Confirm that both the **Invoiced** and **Invoice Enabled** drop-down values are set to **Yes**.

Image



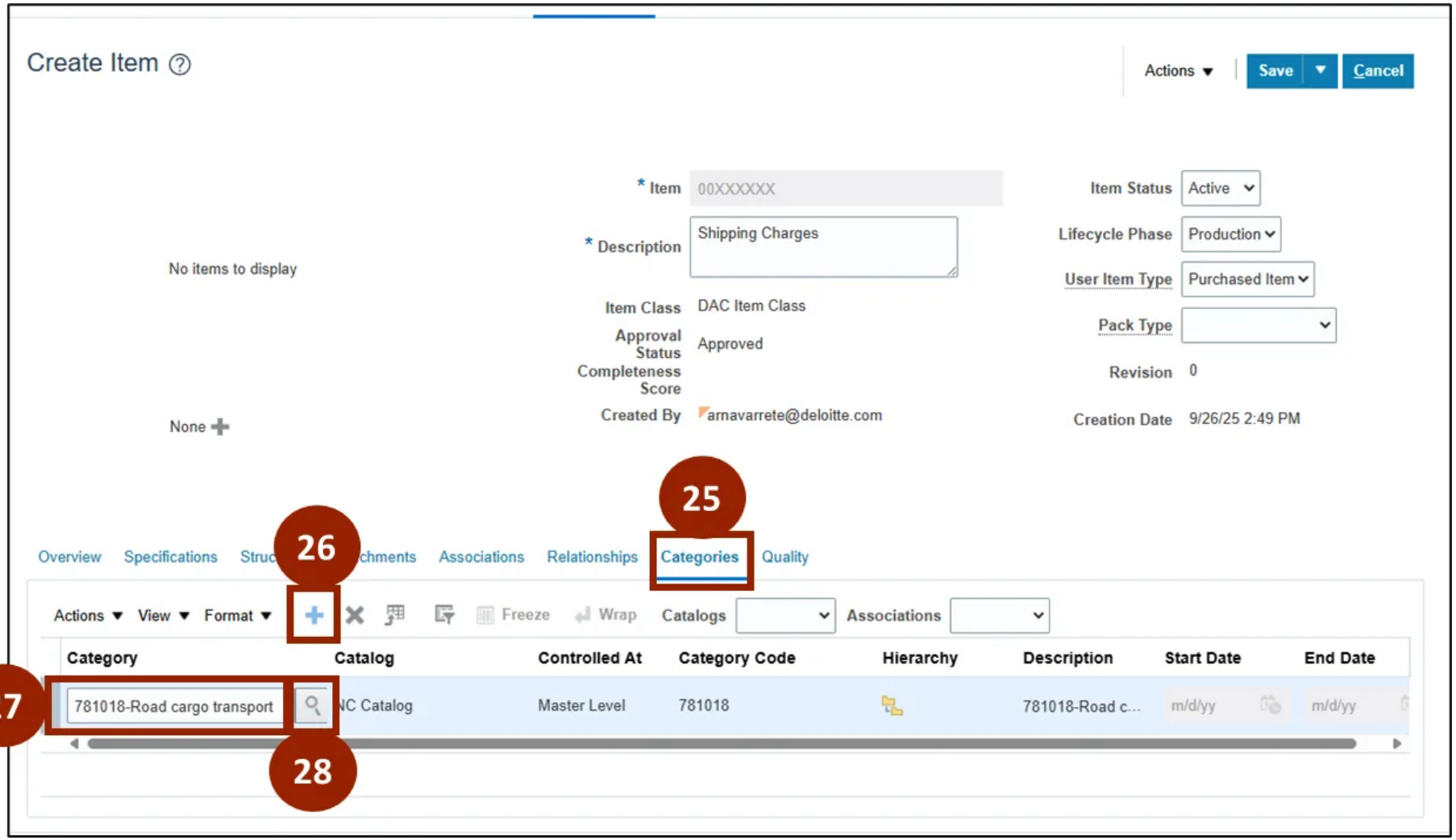
Step 25. Navigate to the **Categories** tab.

Step 26. Select the **Add Row** icon.

Step 27. In the **Category** field, enter **781018-Road cargo transport**.

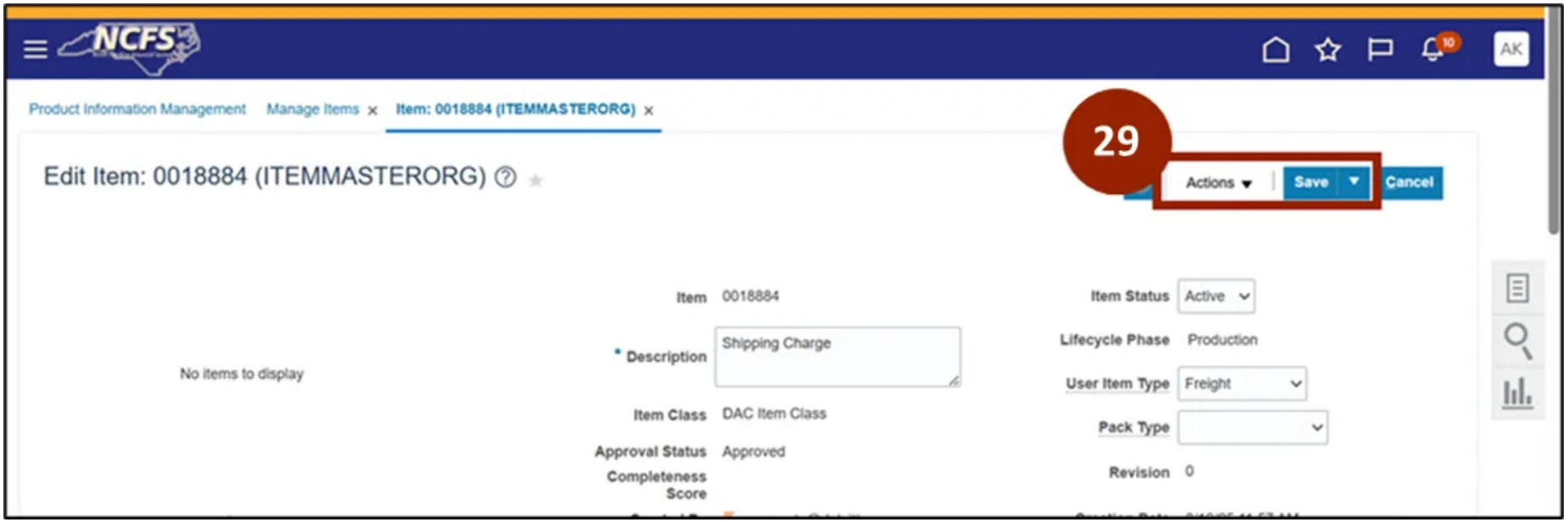
Step 28. Click the **Search** icon.

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Step 29. Scroll to the top of the **Create Item** page and select **Save**.

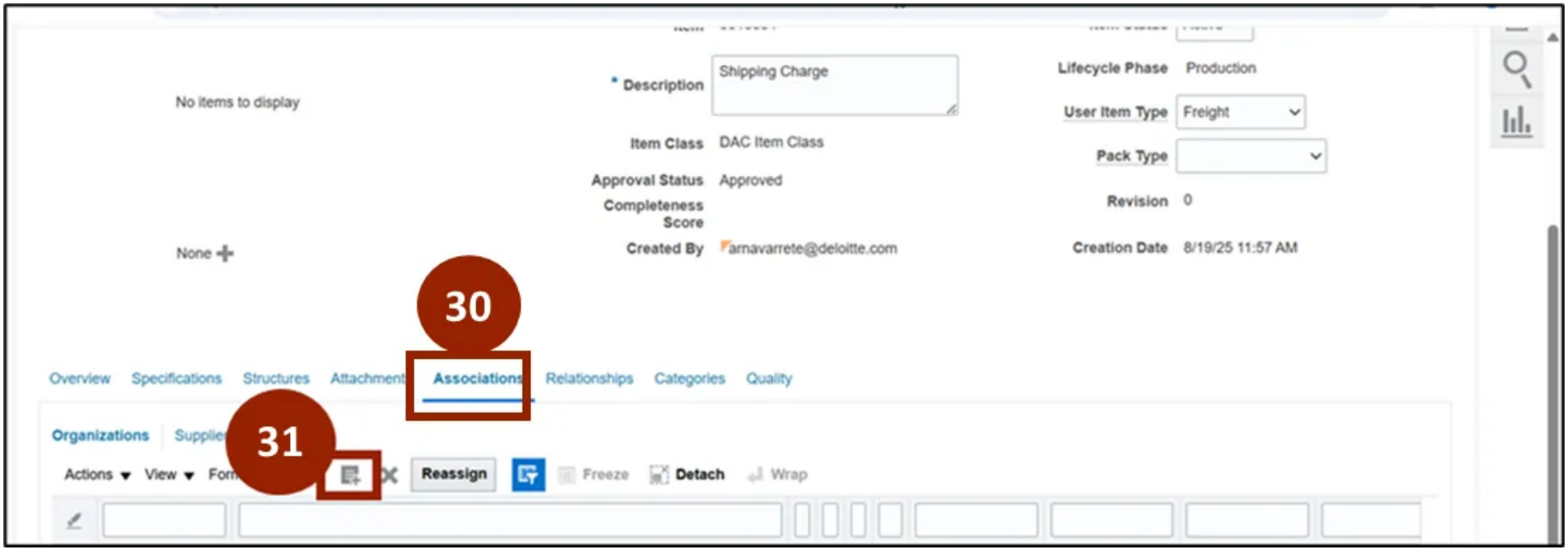
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Step 30. Navigate to the **Associations** tab.

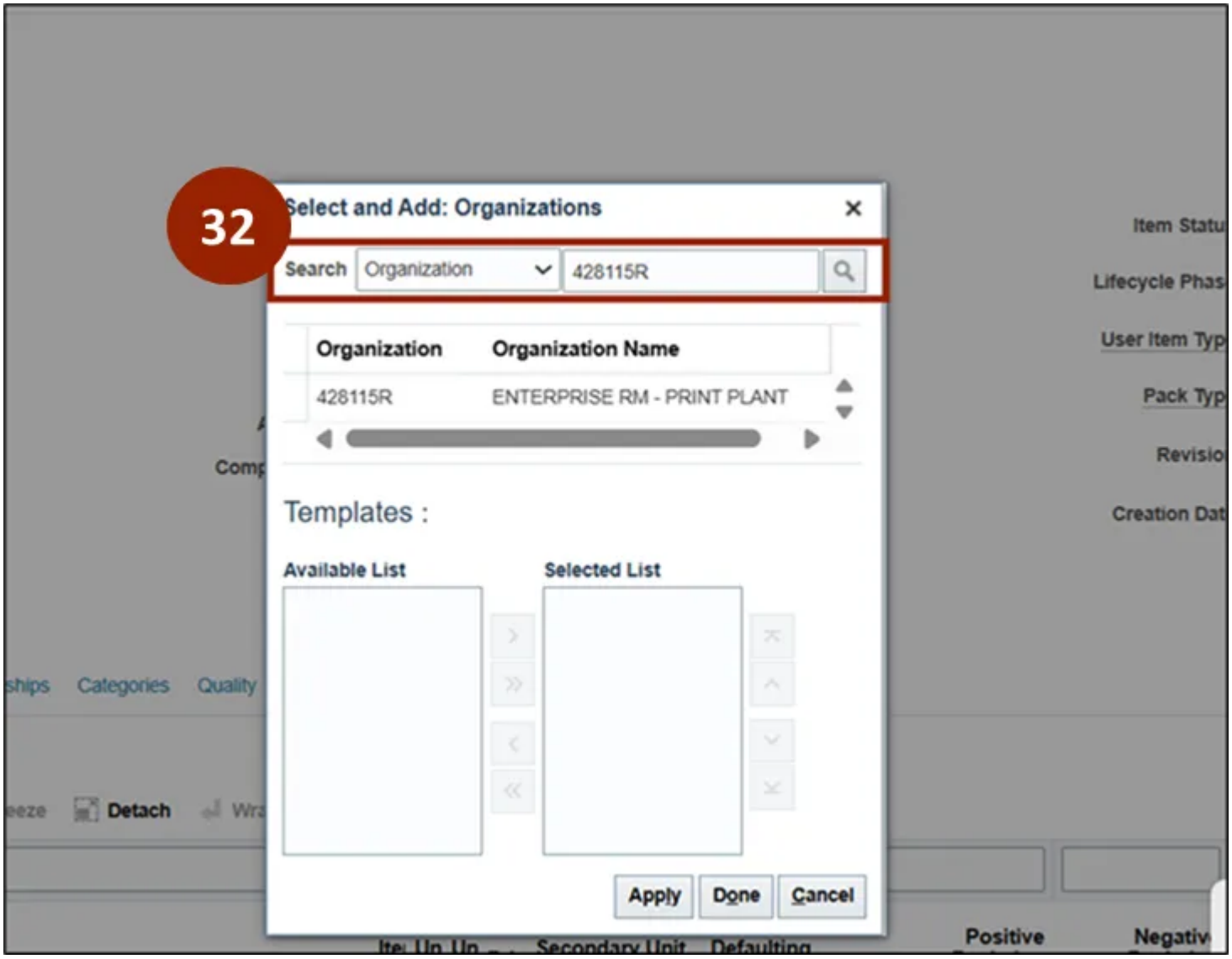
Step 31. Select the **Add** icon to open the **Select and Add: Organizations** pop-up.

Image



Step 32. In the **Search** field, search the organization to associate the item where it will be utilized, then click the **Search** icon.

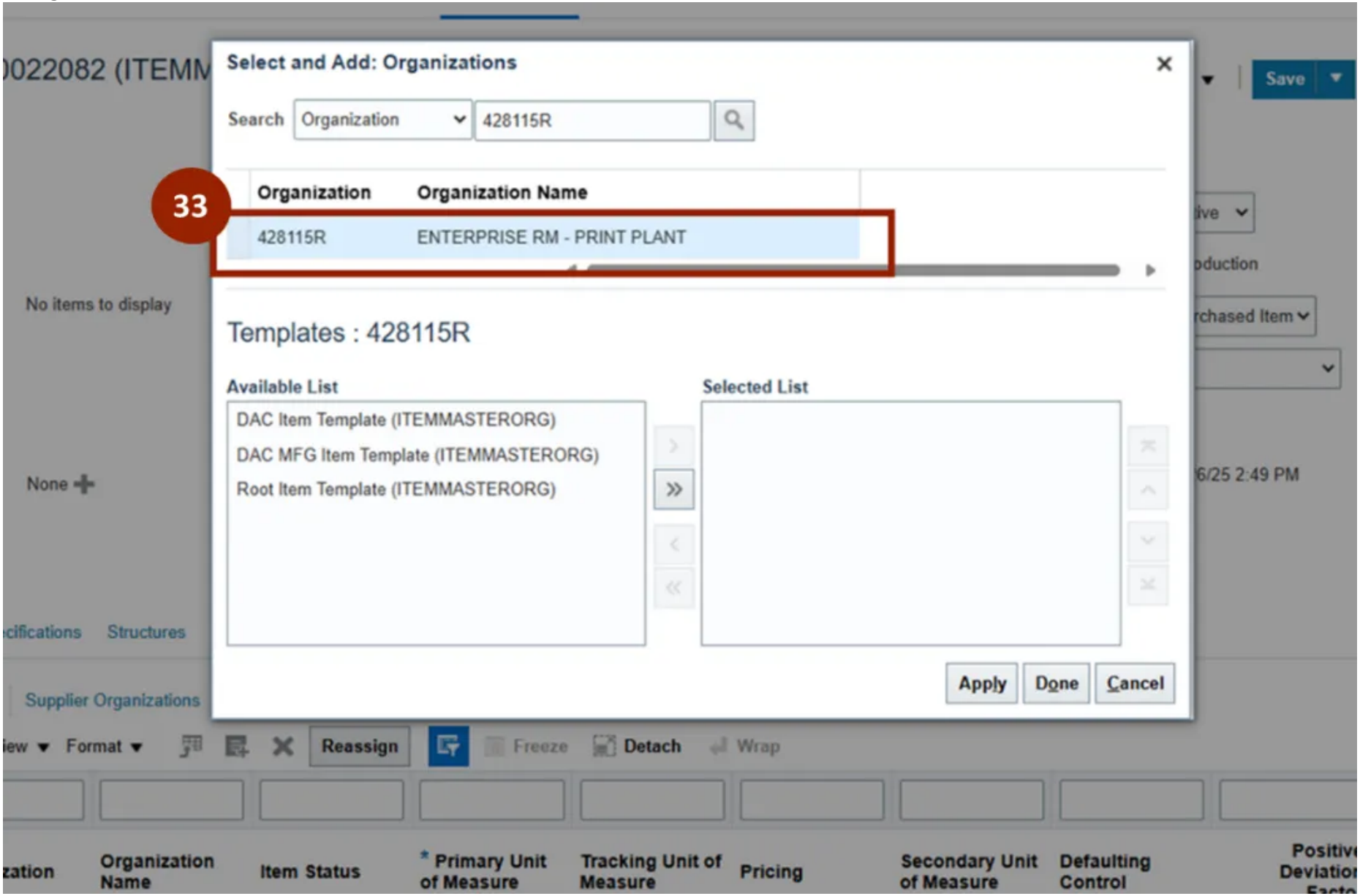
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Step 33. Select the **Organization** under the **Organization** column header to apply the related organizations.

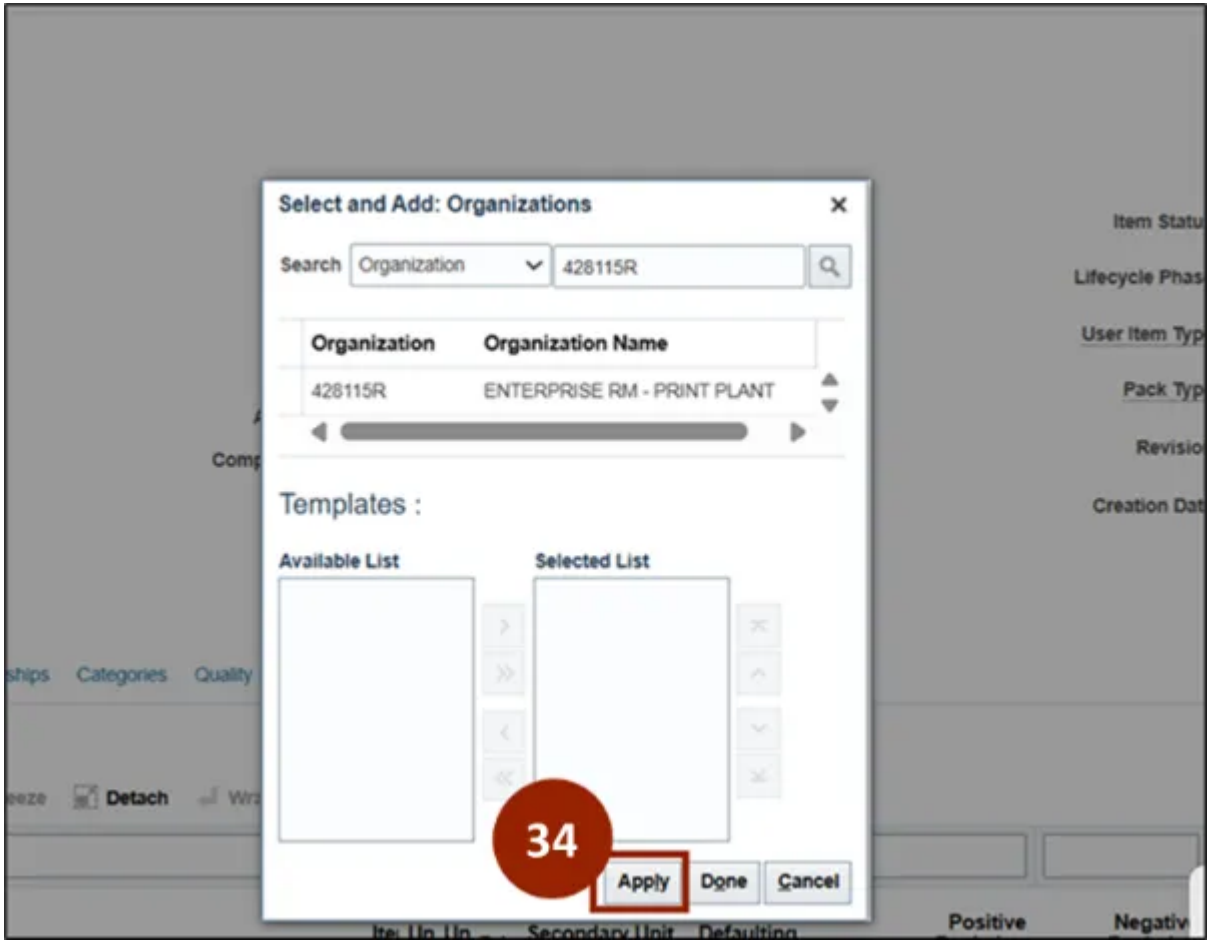
Note: If multiple organizations populate, select the white box next to the Organization column header to apply the full list of related organizations.

Image


Select and Add: Organizations
Search
Organization
428115R
33
Organization
Organization Name
428115R
ENTERPRISE RM - PRINT PLANT
Templates : 428115R
Available List
DAC Item Template (ITEMMASTERORG)
DAC MFG Item Template (ITEMMASTERORG)
Root Item Template (ITEMMASTERORG)
Selected List
Apply
Done
Cancel
No items to display
None
Save
Supplier Organizations
Reassign
Freeze
Detach
Wrap
Format
Organization Name
Item Status
Primary Unit of Measure
Tracking Unit of Measure
Pricing
Secondary Unit of Measure
Defaulting Control

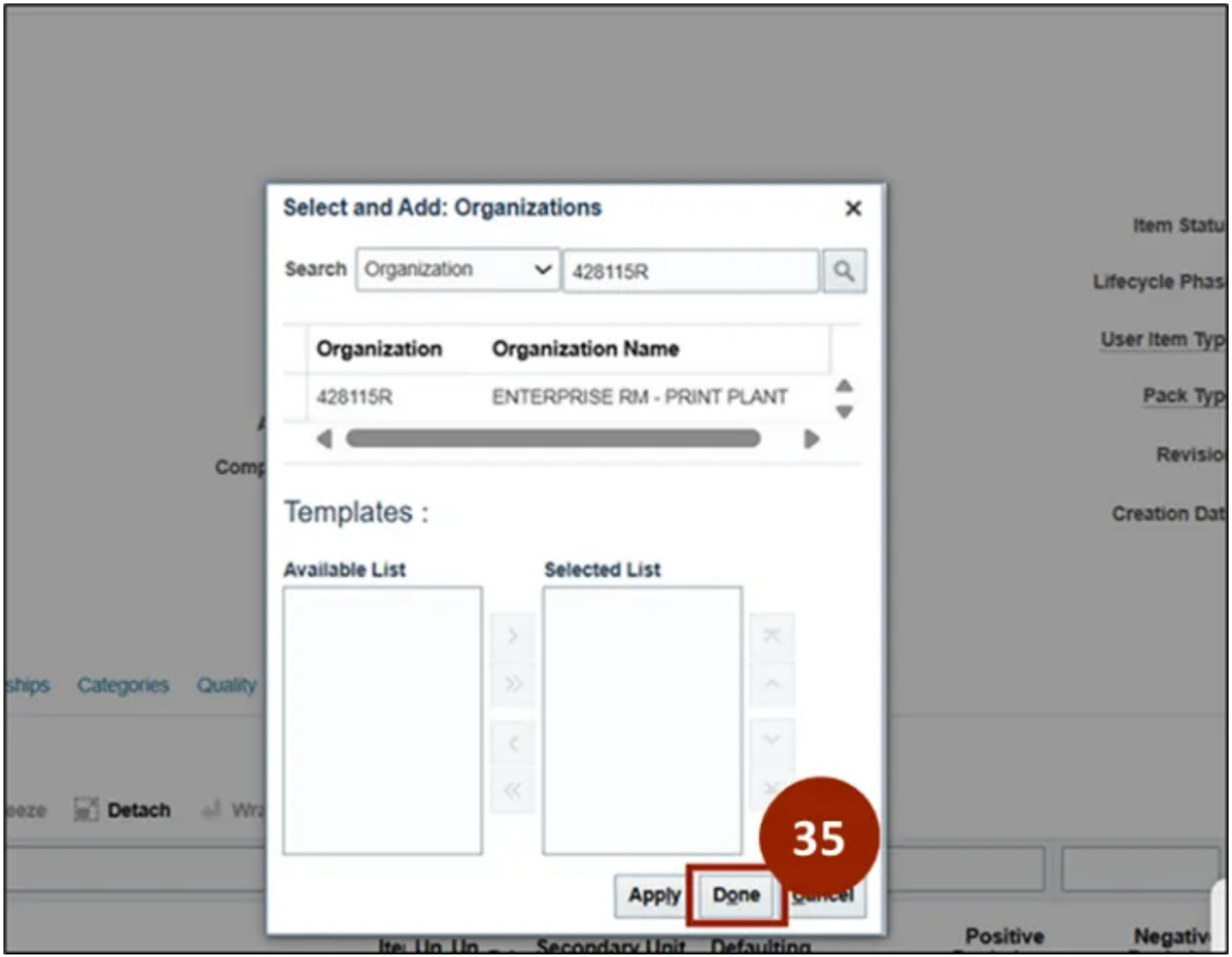
Step 34. Select the **Apply** button.

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Step 35. Select the **Done** button.

Image



Step 36. Navigate back to the top of the **Create Item** page. From the **Save** drop-down, select **Save and Close**.

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Wrap-Up

NCFS users can create freight items by following the steps outlined above.

Additional Resources

- Instructor Led Training (ILT)
  - MFG107: Manage Product Master Data

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