

# ADMINISTRATIVE PROCEDURES



Procedure Number: 22-56

Effective Date: 03/12/2007

Revision Date: \_\_\_\_\_

*C. DeLuca*  
County Administrator

---

SUBJECT: **SETTING UP A STOCK CODE IN A STOREROOM**

---

DEPARTMENT RESPONSIBLE: **ALL COUNTY DEPARTMENTS**

---

## I. STATEMENT

After a Storeroom has been created, stock codes must be associated with that Storeroom. This must occur prior to any Requisition, Blanket Contract release, or Purchase Order being created for that stock code in that Storeroom.

There are three methods of associating the stock code with the Storeroom: If there is a Stock Transfer from a Storeroom with the stock code to a Storeroom without the stock code, the association will occur in the new Storeroom. If the stock code is new to the Catalog, an association may be made when the item is created in the Change Request – New Catalog Item, but to only one Storeroom. If the stock code is in the Catalog, then an association may be made by going to the Storeroom and creating the stock code within the Storeroom directly.

This procedure describes how to create an association between the stock code and the Storeroom by each of the three methods.

## II. PROCEDURE

### A. Creating an association by a Stock Transfer.

1. A Stock Transfer will automatically set up a stock code in a Storeroom when the transfer is requested.
2. The stock code's account and expense code information will be determined from the Storeroom's account and expense code information.

3. The Stores Reorder information must be completed by the Warehouse Supervisor.
- B. Creating an association by a Catalog Change Request – New Catalog Item.
1. When a Catalog Change Request – New Catalog Item is created, an association between the new Catalog item and one Storeroom may be created.
  2. After the Catalog information has been added, the Storeroom may be added, which will auto-fill the account and expense code information. The Stores Reorder information may be completed at the same time.
  3. After the Change Request has been approved and the Action, Apply Changes, has been completed, the item will be created in the Catalog and in the Storeroom simultaneously.
- C. Creating an association directly.
1. From the Storeroom Search screen, click on the New button and a blank Storeroom Stock Code screen will be displayed.
  2. Upon entering the stock code from the Catalog and the Storeroom number, the account and expense code information will be auto-filled.
  3. The Stores Reorder information must be completed by the Warehouse Supervisor.

### **III. OFFICE OF PRIMARY RESPONSIBILITY**

Each Operational Department is responsible for all stock code associations within each storeroom.

### **IV. REFERRAL PROCEDURE**

For detailed instructions, please refer to FINANCE PROCEDURES FOR SPL/SYNERGEN FN-56, SETTING UP A STOCK CODE IN A STOREROOM.