
How to add Order without Inventory, or Assign Inventory Manually

- **Product:** Alma
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Description

How to order in Alma without creating inventory? Can a new POL be assigned manually to existing, e.g. items, portfolios, Electronic Collections?

Resolution

There are two options to create orders without inventory in Alma.

- The first option does not create any inventory, by design (e.g. for a library equipment). The order can't and won't link to any record in Alma. It is called *Creating Service Subscription PO Lines Without Inventory*. Found in the Acquisitions > Purchase Order Lines > **Order without Inventory**.
- The **second option** adds a PO Line to a record in Alma, and yet bypasses adding inventory automatically. It is enabled with the "**Assign Inventory Manually**" checkbox of the new POL menu, as follows:
 1. Identify the resource for which an order needs to be created without adding inventory.
 2. Click: **Order**.
 3. Choose the **PO Line Type**.
 4. For most PO Line Types, there will be a button - "**Assign Inventory Manually**".
 5. Select this option, continue in adding the order information.
 6. "**Save**" (not "Save and Continue"!!!), and confirm alerts regarding no inventory
 7. In Alma, go back and find the item or portfolio for which you wish to link the new POL
 8. Edit the item or the portfolio
 9. For portfolios, in the Acquisitions tab - add the new POL number and save. For items, in the General tab of Physical Item Editor, add the new POL number and save.
 10. Now, at this point, find the POL again and "Order Now" or "Save and Continue".

Note:

We received this input -

" We've discovered that creating a PO line from a template overrides the 'Assign Inventory Manually' option when the template was saved with Library and Location values in the Ordered Items section. Creating a PO line from a template generated an item even though the 'Assign Inventory Manually' option was selected. The expected behaviour was that no inventory would have been created when using the 'Assign Inventory Manually' option.

" We resolved this issue by editing the template, removing the Ordered Item, and then saving the template. By saving the template without Ordered Item details, we were then able to create a PO line from the template using the 'Assign Inventory

Manually' option, following which the PO line was created without inventory as expected. "

Additional Information

Click here for Online Help on "[Creating Service Subscription PO Lines Without Inventory](#)", as well as how to "[Assign Inventory Manually](#)".

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