CREATE, INQUIRE, AND EDIT TRANSFER ORDERS FROM INVENTORY

INV

QUICK REFERENCE GUIDE INV-11

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Create, Inquire, and Edit Transfer Orders from Inventory in the North Carolina Financial System **(NCFS)**.

Introduction and Overview

This QRG covers the explanation of how to create, inquire, and edit orders in NCFS to maintain records of all the inventory transfers performed from one warehouse to another to enhance warehouse management and order processing.

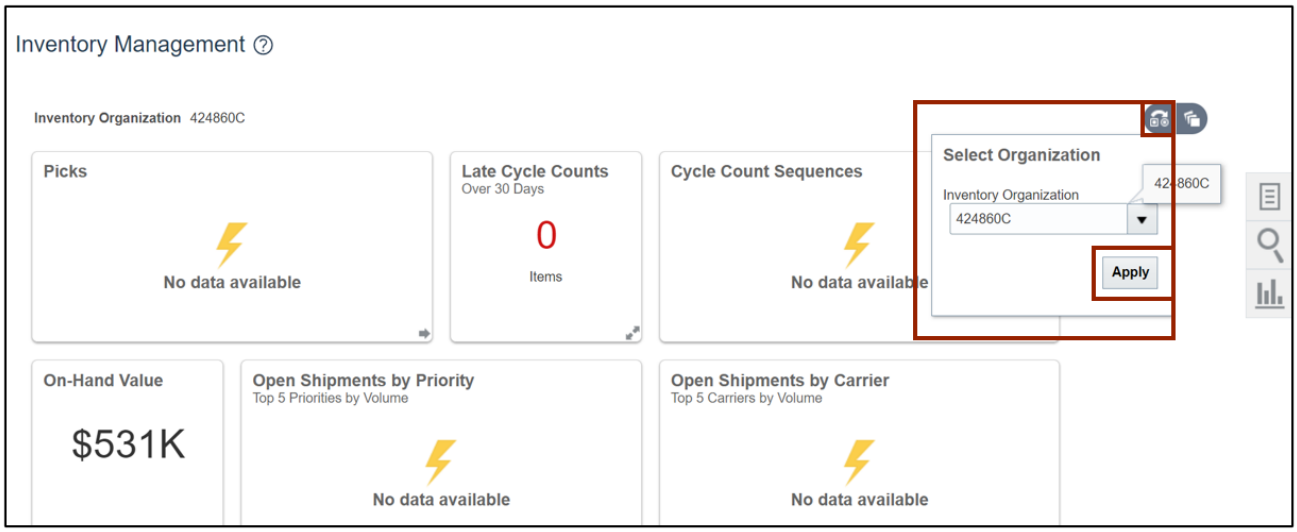
Create and Inquire on Orders from Inventory

To create and inquire on orders from inventory in NCFS, please follow the steps below:

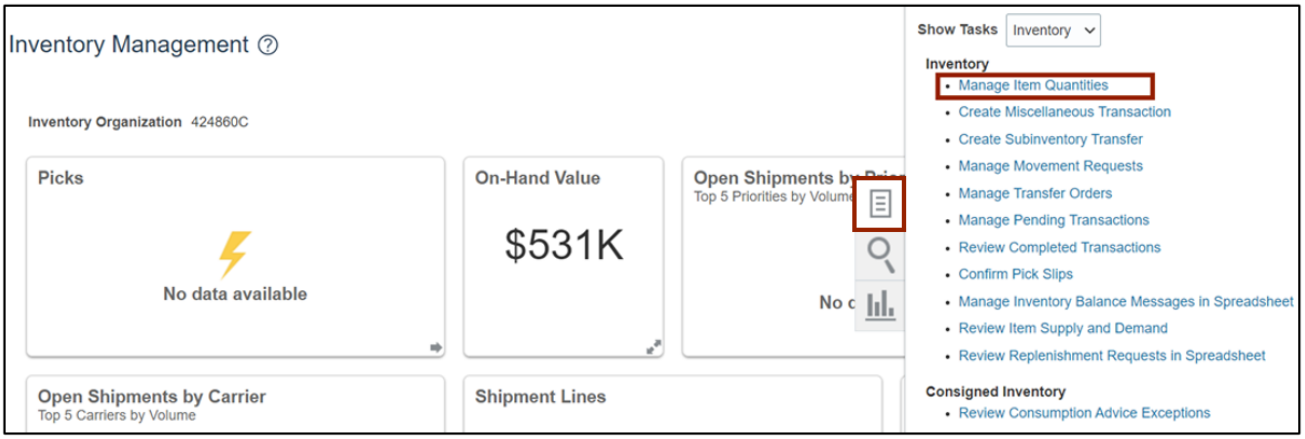
1. Log in to the NCFS portal with your credentials to access the system.

2. On the **Home** page, under the **Supply Execution** tab, click the **Inventory Management** app.

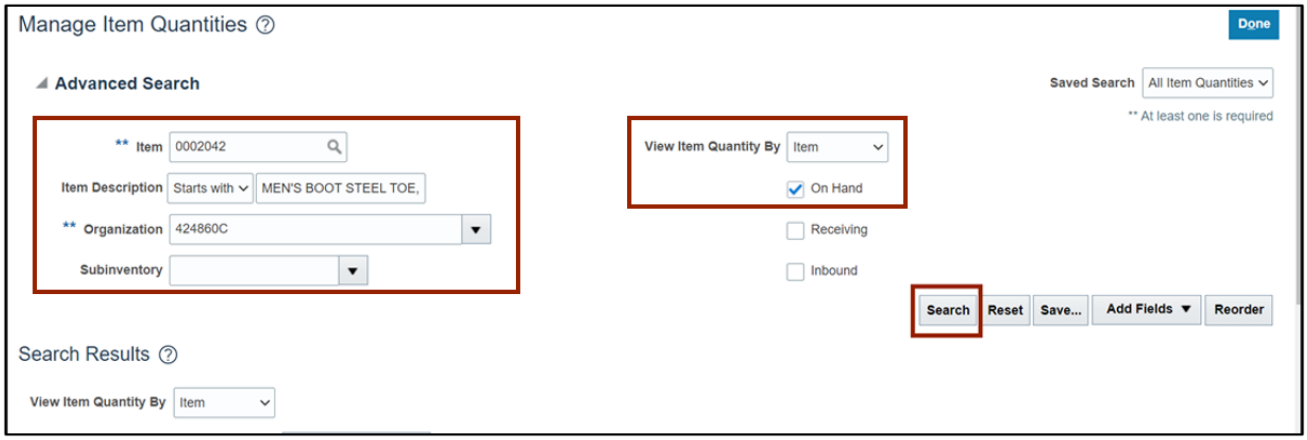
3. On the **Inventory Management** page, click the **View By [ ]** icon and enter the **Inventory Organization** number in the *Select Organization* pop-up box. Click the **Apply** button.



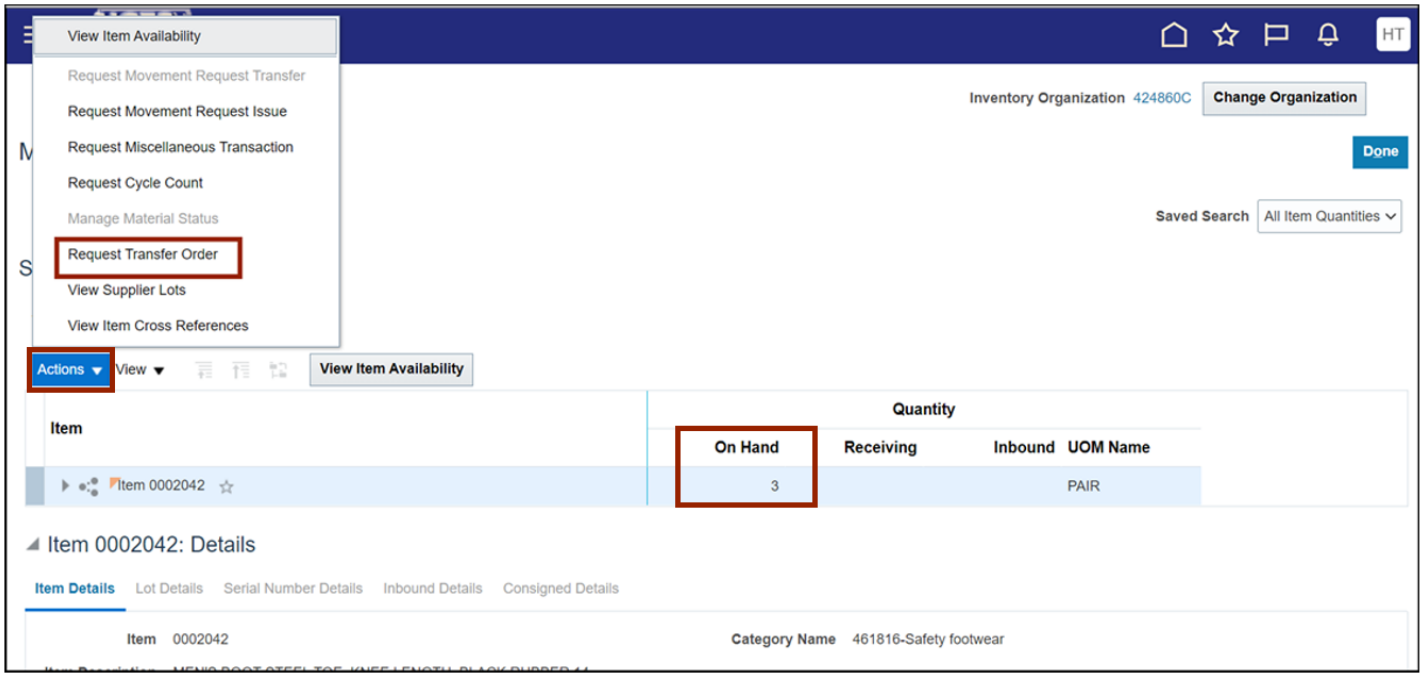
7. Click on the **Tasks [ ]** icon. Under the ***Inventory*** section, click **Manage Item Quantities.**



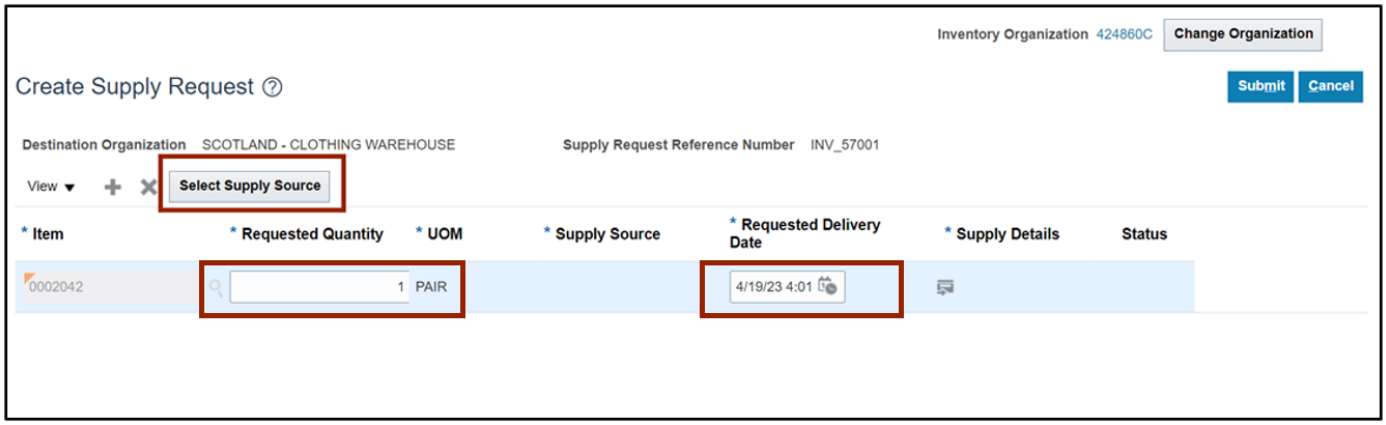
8. In the ***Advanced Search*** section, enter the mandatory details and select the **On hand** option for ***View the Item Quantity By*** field. Click the **Search** button.



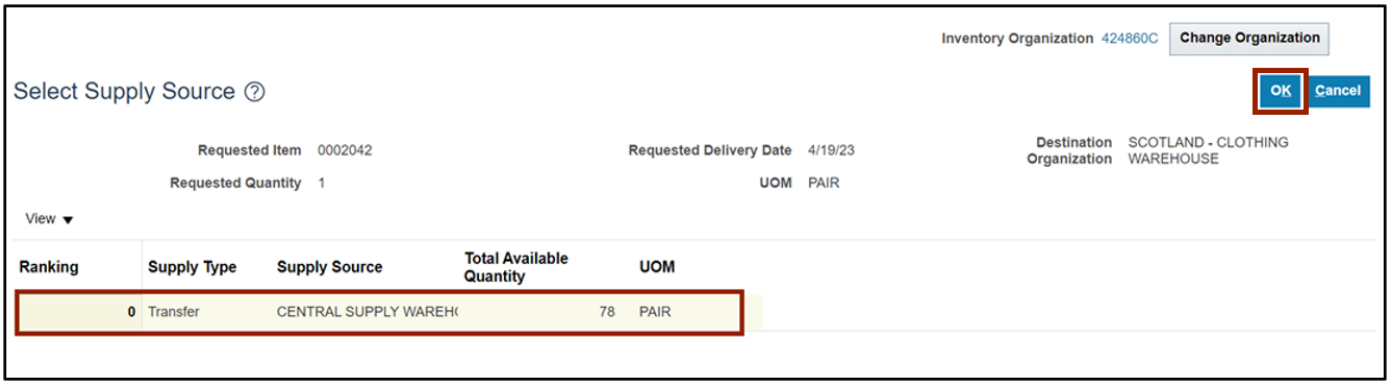
9. Review and validate the **On Hand** quantity. Click the *Actions* drop-down choice list and select the **Request Transfer Order** option.



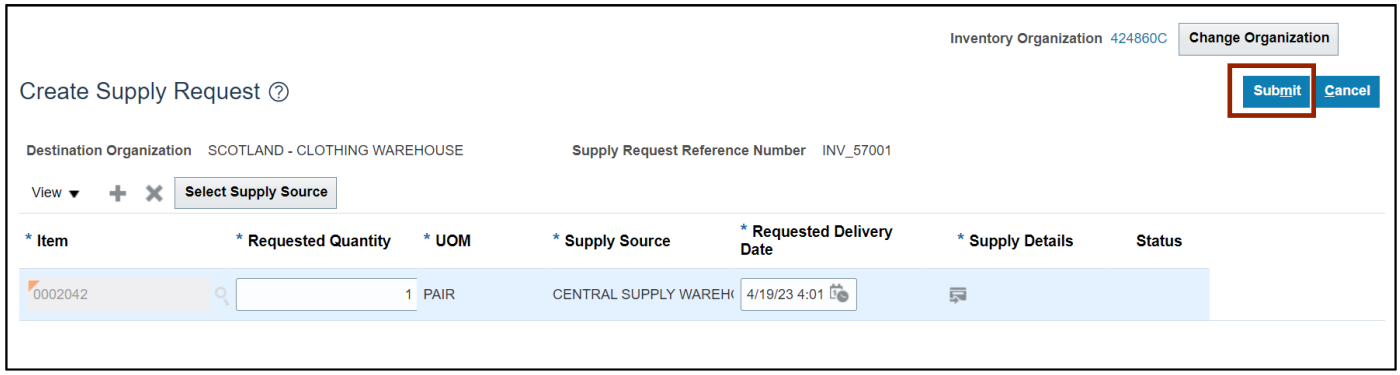
10. Enter **Requested Quantity** and **Requested Delivery Date**. Click the **Select Supply Source** button.



11. Select a record from the list of supply sources and click the **OK** button.



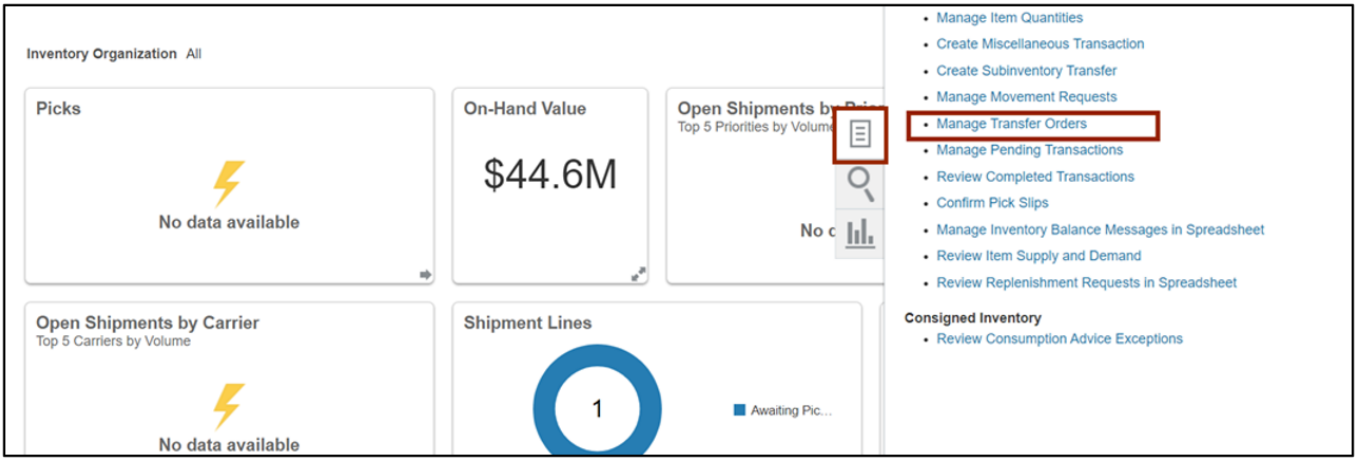
12. Click the **Submit** button.



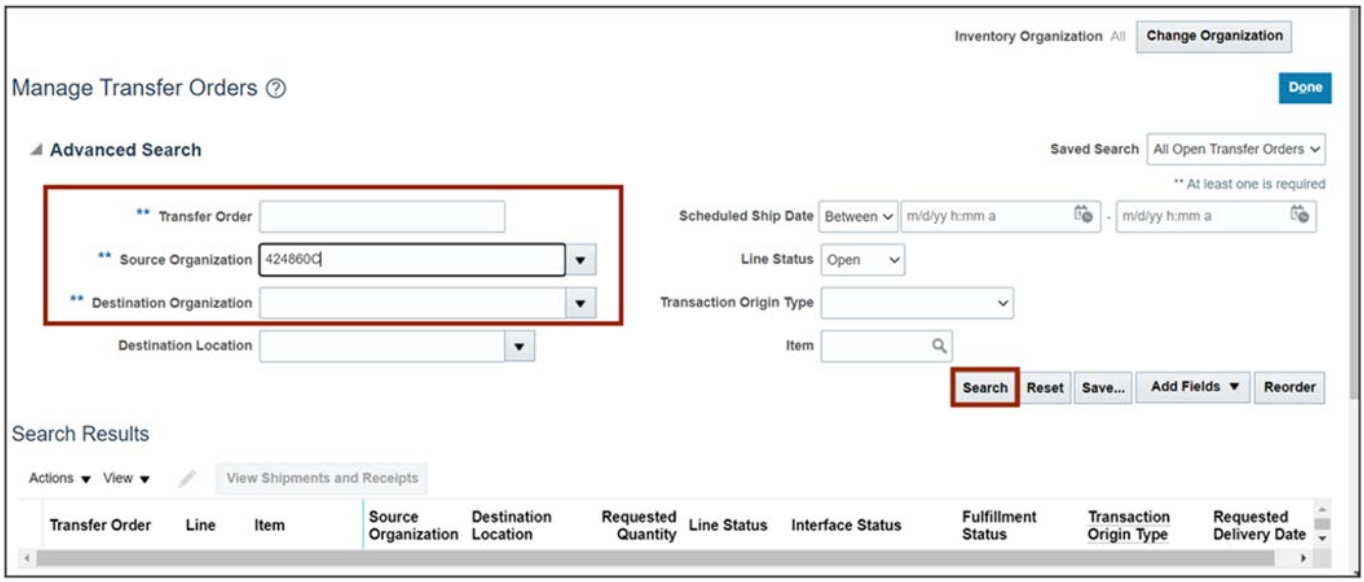
13. Click the **OK** button after the *Supply Details* pop-up appears.

14. To Validate that the Transfer Order has been created, on the **Home** page, under the **Supply Execution** tab, Click the **Inventory Management** app.

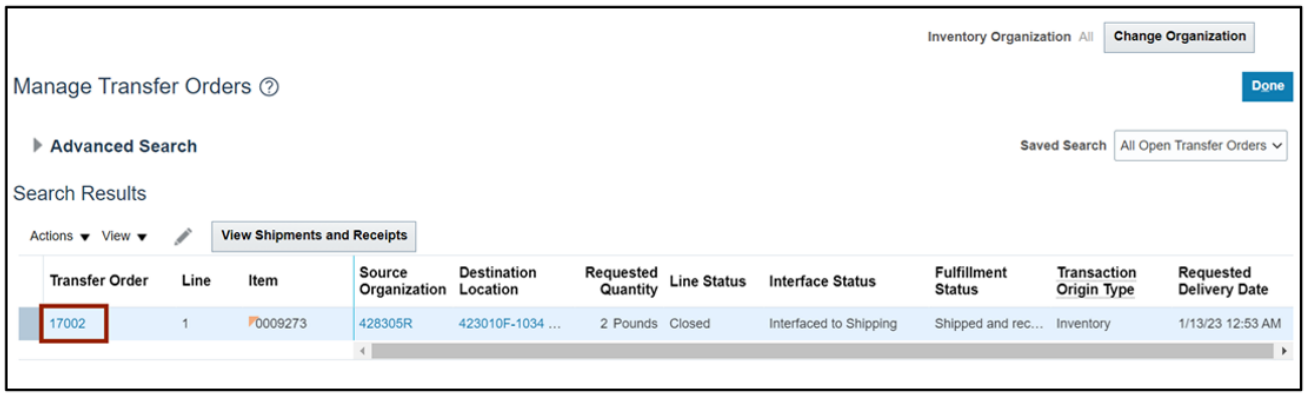
15. Click the **Tasks [ ]** icon. Under the ***Inventory*** section, click **Manage Transfer Orders.**



16. In the ***Advanced Search*** section, enter all mandatory details and click the **Search** button.

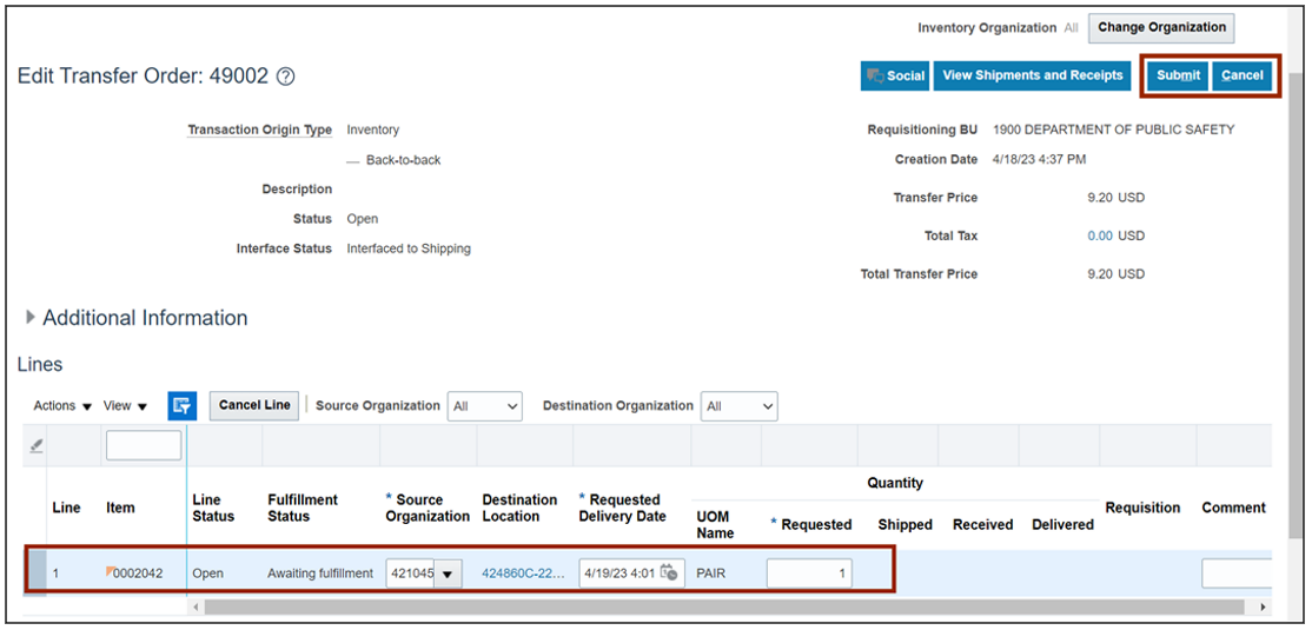


17. Click the **Transfer Order** link.



18. On the **Edit Transfer Order page**, validate that the details are correct. Certain edits to the order can be made here.

    When editing is completed, click the **Submit** button. Click the **Cancel** button if no changes are to be made.



Wrap-Up

Create and Inquire on Orders from Inventory using the steps above.

Additional Resources

Web-Based Training (WBT)

- INV001: Inventory Inquiry