



# PERFORMING A SHORT PICK

## QUICK REFERENCE GUIDE INV-36

INV

### Purpose

The purpose of this Quick Reference Guide (QRG) is to provide a step-by-step explanation on how to Perform a Short Pick in the North Carolina Financial System (NCFS).

### Introduction and Overview

This QRG explains how to perform a short pick in NCFS.

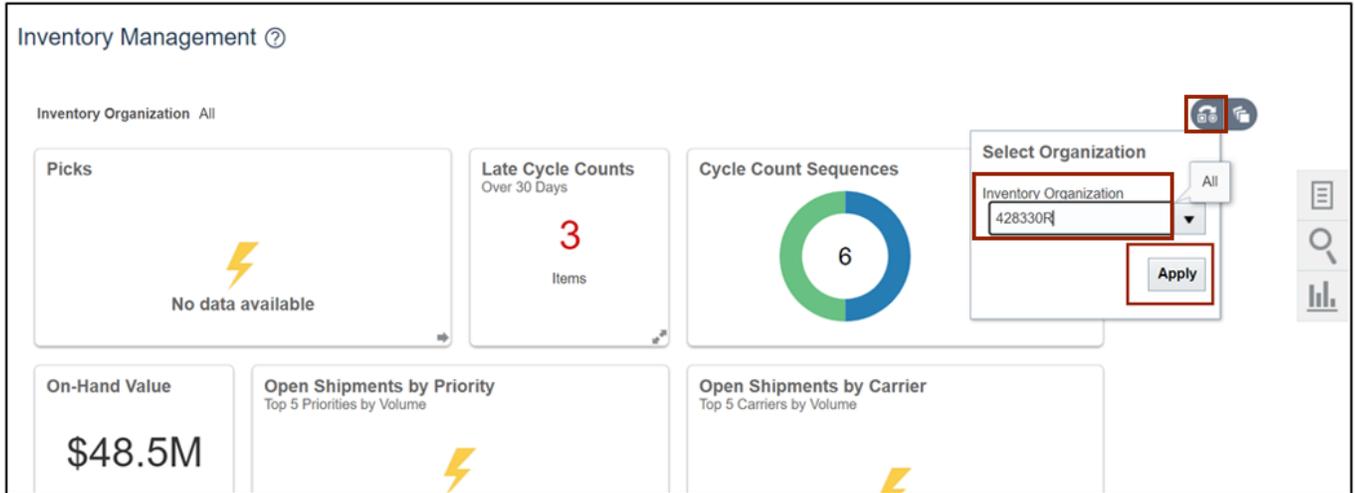
### Perform a Short Pick

To perform a short pick 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 Chain Execution** tab, click the **Inventory Management** app.

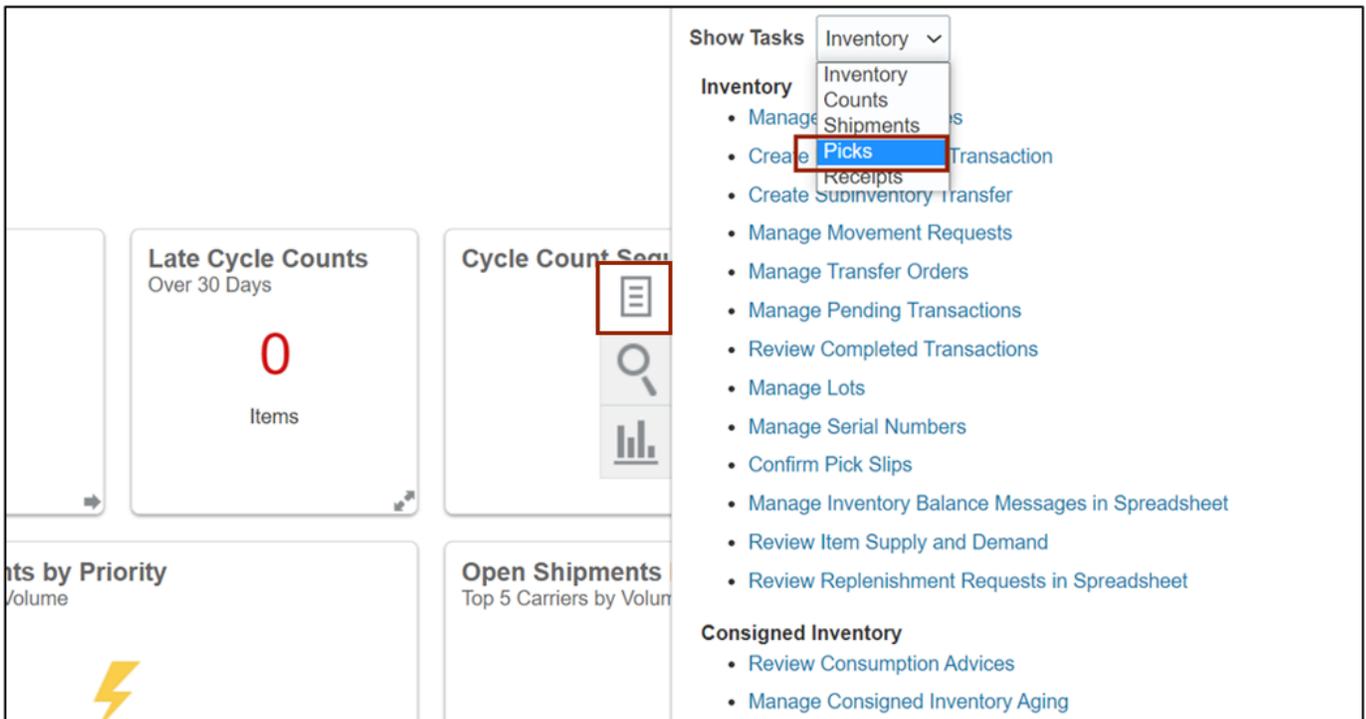


- On the **Inventory Management** page, click the **View by** [  ] icon and enter the **Organization ID**. Click the **Apply** button.



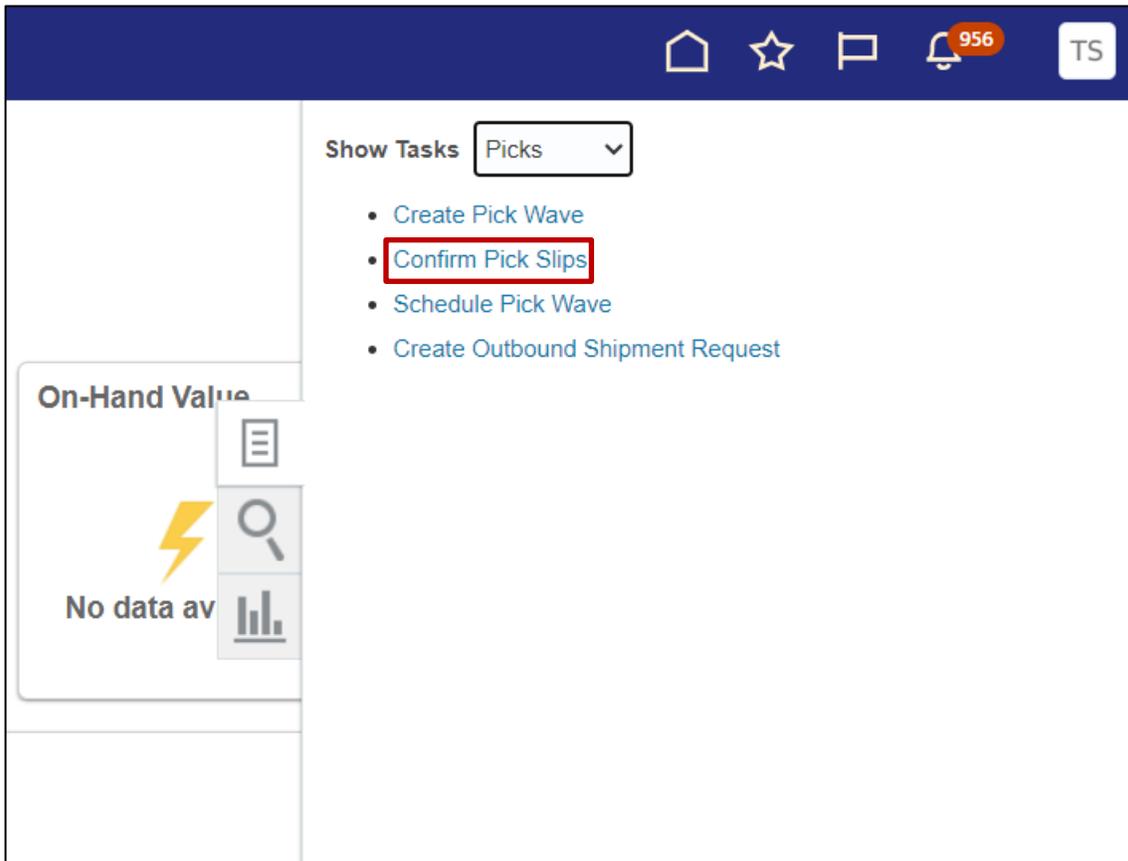
The screenshot shows the 'Inventory Management' dashboard. A 'Select Organization' dialog box is open, with 'Inventory Organization' selected and '428330R' entered in the text field. The 'Apply' button is highlighted with a red box. The dashboard includes several widgets: 'Picks' (No data available), 'Late Cycle Counts' (3 Items), 'Cycle Count Sequences' (6), 'On-Hand Value' (\$48.5M), 'Open Shipments by Priority' (No data available), and 'Open Shipments by Carrier' (No data available).

- Click the **Tasks** [  ] icon and select **Picks** from the *Show Tasks* drop-down choice list.



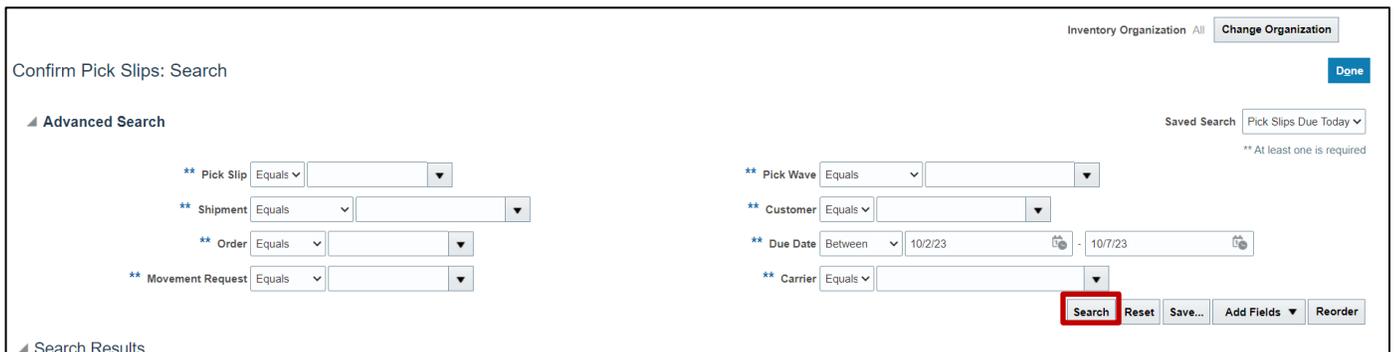
The screenshot shows the 'Inventory Management' dashboard with the 'Show Tasks' dropdown menu open. The 'Picks' option is highlighted with a blue box. The dashboard includes several widgets: 'Late Cycle Counts' (0 Items), 'Cycle Count Sequences', 'Open Shipments by Priority' (No data available), and 'Open Shipments by Carrier'. The 'Tasks' icon is highlighted with a red box.

5. Click **Confirm Pick Slips**.



6. Search for the pick wave to be short picked.

In this example, all pick waves for the week of 10/2 was searched on. Click **Search**.



- Search results will appear towards the bottom on the screen. Find the pick wave and click the **Pick Slip** link.

Search Results

View Pick Status: Open Pick Slip Type: All Order Type: All Organization:

Pick Slip	Organization	Due Date	Pick Status	Order	Order Type	Shipping Method	Customer	Picks		
								Open	Confirmed	Total
142009	423100C	10/4/23 12:59 PM	Open	121015	Transfer order		INV Warehouse...	1	0	1
142011	423100C	10/4/23 12:59 PM	Open	121007	Transfer order		INV Warehouse...	1	0	1
142016	423100C	10/5/23 12:40 PM	Open	123015	Transfer order		INV Warehouse...	1	0	1
142028	423100C	10/7/23 12:31 PM	Open	123051	Transfer order		INV Warehouse...	1	0	1
144007	4210451	10/2/23 12:29 PM	Open	121003	Transfer order		INV Warehouse...	1	0	1
146010	423100C	10/6/23 9:44 AM	Open	123022	Transfer order		INV Warehouse...	1	0	1
146013	423100C	10/6/23 12:48 PM	Open	123039	Transfer order		INV Warehouse...	1	0	1
147010	4210451	10/3/23 12:43 PM	Open	122003	Transfer order	INTERNAL_A...	INV Warehouse...	1	0	1
147011	4210451	10/3/23 1:08 PM	Open	122022	Transfer order	INTERNAL_A...	INV Warehouse...	1	0	1
147013	4210451	10/6/23 12:27 AM	Open	122033	Transfer order	INTERNAL_A...	Training Super 2	1	0	1

- On the **Confirm Pick Slip** screen, change the picked quantity to less than the requested quantity and check mark the **Ready to Confirm** box.

Confirm Pick Slip: 147013

Organization : 4210451

Summary

Creation Date: 10/6/23 12:28 AM      Number of Picks: 1

Pick Status: Open      Order: 122033

Picks

Actions View Pick Status: Open

<input type="checkbox"/> Ready to confirm	Line	Pick Status	Item	Item Description	UOM Name	Requested Quantity	Picked Quantity	Source Subinventory	Source Locator	Lot
<input checked="" type="checkbox"/>	1	Open	0001871	SWEET & LOW...	CASE	10	5	01A1		



9. Click **Confirm**.

Inventory Organization All Change Organization

Confirm Cancel

Confirm and Go to Ship Confirm  
Confirm and Close

Number of Picks 1  
Order 122033

Picked Quantity	Source Subinventory	Source Locator	Lot	From Serial Number	To Serial Number
5	01A1				

\*\*\*There are two options after the Inventory Short Pick is completed:

- The first option is to let the remaining item requested quantity go to Backordered status to be fulfilled once additional item quantity is received on a purchase order. In this case nothing further needs to be done by the user.
- The second option is to not issue the remaining item requested quantity and to remove it from Backordered status by updating the Transfer Order Quantity.

**Follow the below steps for Option B. Updating Transfer Order Quantity on Short Picked Item**

10. Go to **Inventory Management** and select **Manage Transfer Orders** from tasks menu.

Inventory Management

Inventory Organization All

Picks: 11.3K (Open, Confirmed T...)

Late Cycle Counts: 0 Items (Over 30 Days)

Cycle Count Sequences: No data available

On-Hand Value: \$48M

Open Shipments by Priority: No data available (Top 5 Priorities by Volume)

Open Shipments by Carrier: No data available (Top 5 Carriers by Volume)

Shipment Lines: 10.7K (Awaiting PIC, Awaiting PIC, Backordered, Awaiting SHK)

Shipment Lines for Next 30 Days: 0.3K, 2.94K, 2.76K, 2.62K (1 to 3 Days, 4 to 7 Days, 8 to 14 Days, 15 to 30 Days)

Receipt Lines: 3.74K

Backordered Supply Lines: 13 (Awaiting Receipt)

Show Tasks: Inventory

- Inventory
  - Manage Item Quantities
  - Create Miscellaneous Transaction
  - Create Subinventory Transfer
  - Manage Movement Requests
    - Manage Transfer Orders
    - Manage Pending Transactions
    - Review Completed Transactions
    - Manage Lots
    - Manage Serial Numbers
    - Confirm Pick Slips
    - Manage Inventory Balance Messages in Spreadsheet
    - Review Item Supply and Demand
    - Review Replenishment Requests in Spreadsheet
- Consigned Inventory
  - Review Consumption Advises
  - Manage Consigned Inventory Aging
  - Review Consumption Advice Exceptions



11. Enter the **Transfer Order** number, click **Search** and then click on the Transfer order number.

Manage Transfer Orders

Inventory Organization All [Change Organization](#) Done

Advanced Search Saved Search All Open Transfer Orders \*\* At least one is required

\*\* Transfer Order

\*\* Source Organization

\*\* Destination Organization

Destination Location

Scheduled Ship Date Between  -

Line Status

Transaction Origin Type

Item

Search Reset Save... Add Fields Reorder

Search Results

Actions View [View Shipments and Receipts](#)

Transfer Order	Line	Item	Allow Item Substitution	Source Organization	Supply Request Reference Number	Request Reference Line	Destination Location	Requested Quantity	UOM Conversions	Line Status	Interface Status	Fulfillment Status	Transaction Origin Type	Back-to-Back	Requisition
122033	1	0001871	—	428305R	INV_40003	300000112483109	423010F-1034 ...	504 Pounds		Open	Interfaced to Shipping	Awaiting fulfillment	Inventory		

12. Find the Item(s) that were Short Picked and reduce the **Requested Quantity** to match the Pick Confirmed Quantity. Click **Submit**.

Edit Transfer Order:  Social [View Shipments and Receipts](#) Submit Cancel

Inventory Organization All [Change Organization](#)

Transaction Origin Type  — Back-to-back

Description

Status

Interface Status

Requisitioning BU

Creation Date

Transfer Price

Total Tax

Total Transfer Price

Additional Information

Lines

Actions View [Cancel Line](#)

Line	Line Includi Item Kit	Allow Item Substitution	Line Status	Fulfillment Status	Source Organization	Source Subinventory	Destination Organization	Destination Subinventory	Destination Location	Destination Type	Requested Delivery Date	UOM Name	UOM Conversions	Requested	Shipped	Received	Del
27	27	0001871	<input type="checkbox"/>	Open	Awaiting fulfillment	428305		423010F		423010F-10...	Inventory	12/8/23 5:26	Pounds	5			

13. The Requested Quantity will now match the Pick Confirmed Quantity. This item is now ready for Ship Confirm.

## Wrap-Up

Perform a Short Pick using the steps above in NCFS.

## Additional Resources

### Virtual Instructor-Led Training (vILT)

- INV 105: Warehouse Management (ILT)
- INV 106: Warehouse Transaction Support (ILT)

