

INVENTORY SHIPPING EXCEPTIONS

QUICK REFERENCE GUIDE INV-52

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation on how to review and correct Inventory Shipping Exceptions in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the review and correction of all Inventory Shipping Exceptions in NCFS which will enable you to review, correct, and prevent delays in shipping orders. These shipments have already been Pick Confirmed and moved to the warehouse staging areas.

Reviewing Inventory Shipping Exceptions

To review inventory shipping exceptions in NCFS, please follow the steps below:

- 1. On the Home page, under the Tools tab, click the Inventory Management app.
- 2. Under the Task Menu, select Shipments from the Show Tasks drop-down list.
- 3. Click Manage Shipments.

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- 4. Under Advanced Search, Select Before in the Initial Ship Date and Select today's date and click OK.
- 5. Select **Show only exceptions** from the **Exceptions** drop down menu.
- 6. Click Search.



7. Click the **Red X** beside the Shipment number to see the Shipping Exception details.

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8. The Review Shipping Exceptions screen will provide details about the shipment line that has a shipping exception.

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Locating and Researching the Transfer Order Number related to the Shipment with Exception(s)

To locate and research the transfer order number related to shipments and exceptions in NCFS, please follow the steps below:

1. Navigate to Inventory Management, Under the Task Menu select Shipments and then Manage Shipment Lines.

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- 2. Select **Before** and enter **Today's Date** in the **Scheduled Ship Date** field.
- 3. Enter the **Exception Name** from the Reviewing Shipment Exceptions screen into the **Exception Name field.**
- 4. Click Search.

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5. Find the **Item number** that matches the Shipping Exception Item number. Write down the **Order** number.

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6. Navigate back to **Inventory Management**, under the **Tasks** menu select **Inventory** and then **Manage Transfer Orders.**

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7. Enter the **Transfer Order number** in the **Transfer Order** field and change **Line Status** to blank and click **Search** to see the Transfer Order Lines.

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8. Click the Transfer Order number to view more details.

9. Review the Transfer Order Details.

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NORTH CAROLINA OFFICE OF THE STATE CONTROLLER



Correcting/Updating Inventory Shipping Exceptions

To correct/update inventory shipping exceptions in NCFS, please follow the steps below:

- 1. Navigate back to Manage Shipment Lines.
- 2. Under Advanced Search, Select Before in the Initial Ship Date and Select today's date and click OK.
- 3. Select **Show only exceptions** from the **Exceptions** drop down menu.
- 4. Click Search.
- 5. Click the **Red X** beside the Shipment number to see the Shipping Exception details.

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5		5477	1	Transfer order	Canceled	BOX	0	0
S 3001347		5725	22	Transfer order	Canceled	BUNDLE	C 0	0
S 1 0010590		7138	4	Transfer order	Canceled	BOX	C 0	0
8 73009490		7172	17	Transfer order	Canceled	BUNDLE	Eo	0



6. Update the Status from Open to Closed.

7. Click Save and Close.

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▲ Requested	Quantity Changed: Exception [Details			-											
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	Error Message															
▲ Summary: It	em 3001347															
	Item Description	BAGS, PAPER, 6 LB,	500/BUNDLE					Packing Unit								
	Revision						Req	uested Quantity	0 BUNDLE							
	Subinventory						SI	nipped Quantity	0 BUNDLE							
	Locator															



Move Inventory Item(s) from Staging Area back to Preferred Stock Location (PSL) Area

To move inventory item(s) from staging area back to preferred stock location (PSL) are in NCFS, please follow the steps below:

1. Navigate to **Inventory Management** and select **Create Subinventory Transfer** from **Tasks** menu.

Inventory Management @1					Show Tasks Inventory Inventory Manage Item Quantities Create Miscellaneous Transaction Create Subinventory Transfer
Picks	Late Cycle Counts Over 30 Days 0 Items	Cycle Count Sequences	On-Hand Value \$133K	Open Shipments by Priorit Top 5 Priorities by Volume	Manage Movement Requests Manage Transfer Orders Manage Pending Transactions Review Completed Transactions Manage Lots Manage Serial Numbers Confirm Pick Slips Manage Interform Reactor Messages in Strengtheet
Open Shipments by Carrier Top 5 Carriers by Volume	Shipment Lines	Awating Pic. Backardered Awating Shi No dat	ext 30 Days	Receipt Lines	Review Hern Supply and Demand Review Replenishment Requests in Spreadsheet Consigned Inventory Review Consumption Advices Manage Consigned Inventory Aging Review Consumption Advice Exceptions
Backordered Supply Lines O Awaiting Receipt					

- 2. In the Type field select Subinventory Transfer.
- 3. Click the + sign to add a line.
- 4. Enter the Item Number and press tab.
- 5. Enter the Staging Area in the Source Subinventory Area field.
 > The Available and On-Hand Quantity's should have enough quantity for the transfer.
- 6. Enter the **Preferred Stock Location (PSL) Area** in the **Destination Subinventory** field.
- 7. Enter the **Quantity** from the Shipping Exception in the **Quantity** field.



8. Click Submit.

				Inventory Organization 38MAIN Change Organization
Create Subinventory Transfe	er 🕜			Submit and Create Another Submit
Transaction				•
	2 Date 12/12/23 2:18 PM		Source	
	Type Subinventory Transfer	T		
	Enter transactions by seri	al numbers		
Transaction Lines 3 Actions View V + + X Record Lots and Serial Numbers Edit Details				
Line * Item	Source	6 Destination	* UOM	
	* Subinventory Locator	* Subinventory Locator	Name	
1 3001347 Q	S38MAIN V	MH11 V		•
Line 1: Availability (?)	-			
, .	Available Quantity 3 BUNDLE		Secondary Available Quantity	
	On-Hand Quantity 3 BUNDLE		Secondary On-Hand Quantity	

9. A Confirmation window will appear, Click OK.



Wrap-Up

Perform various tasks around Inventory Shipping Exceptions using the steps above in NCFS.

Additional Resources

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

