



INVENTORY OVERPICK/OVERSHIP FEATURE

QUICK REFERENCE GUIDE INV-60

INV

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation on how to process Inventory Transfer Order Over picking/Over shipping of items in the North Carolina Financial System (**NCFS**).

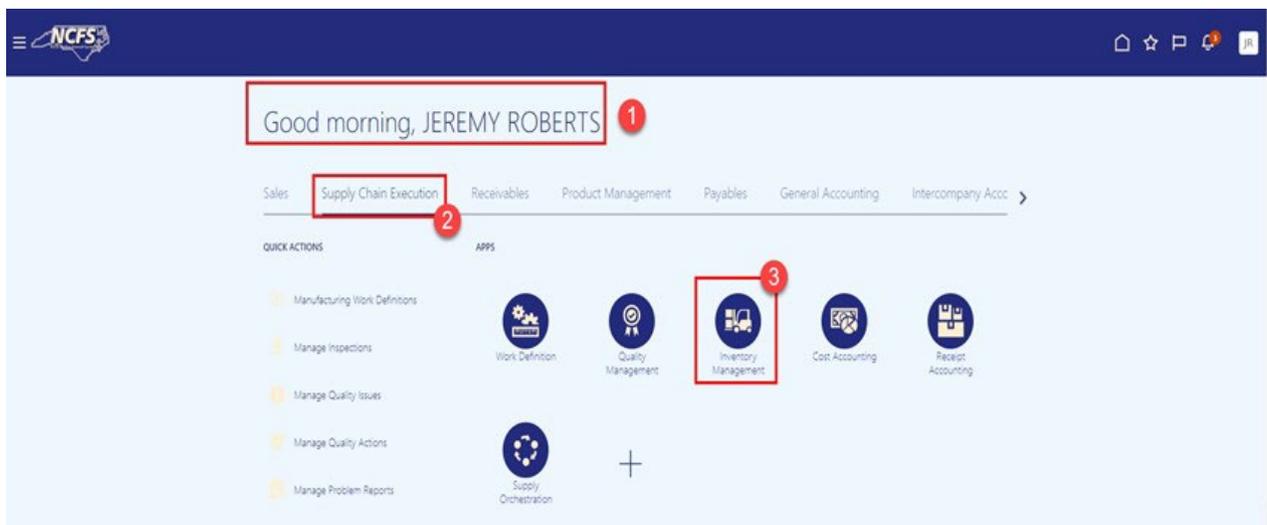
Introduction and Overview

This QRG covers the process of Over picking/Over shipping of inventory items on transfer orders by the source inventory organization in NCFS. This feature allows inventory organizations to adjust the quantity over the original requested quantity on transfer orders and then ship that quantity to the requesting facility.

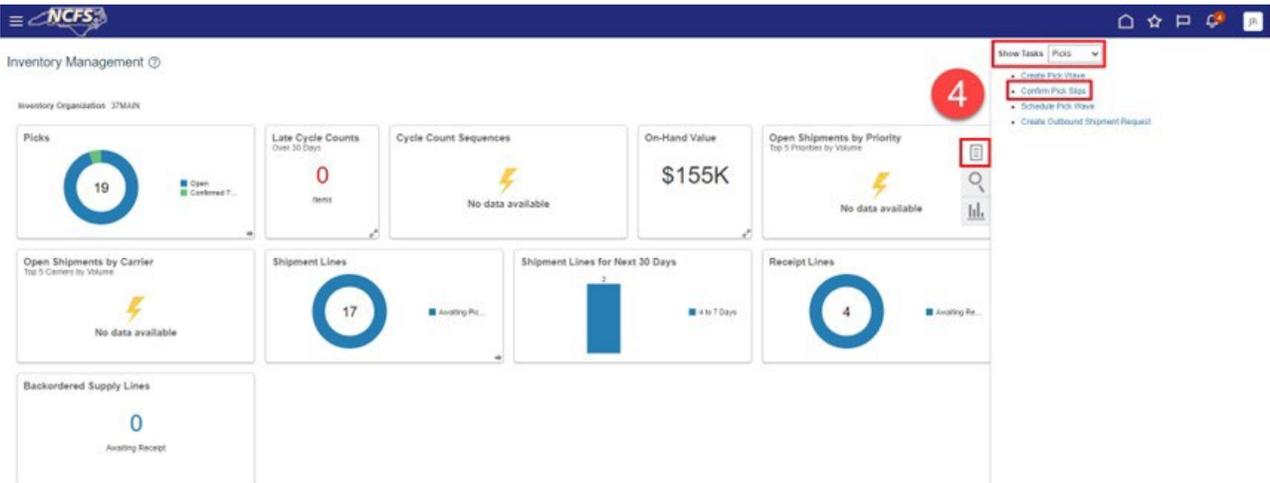
Overpick/Overship Inventory Transfer Orders

To complete an Overpick/Overship of an Inventory Transfer Order in NCFS, please follow the steps below:

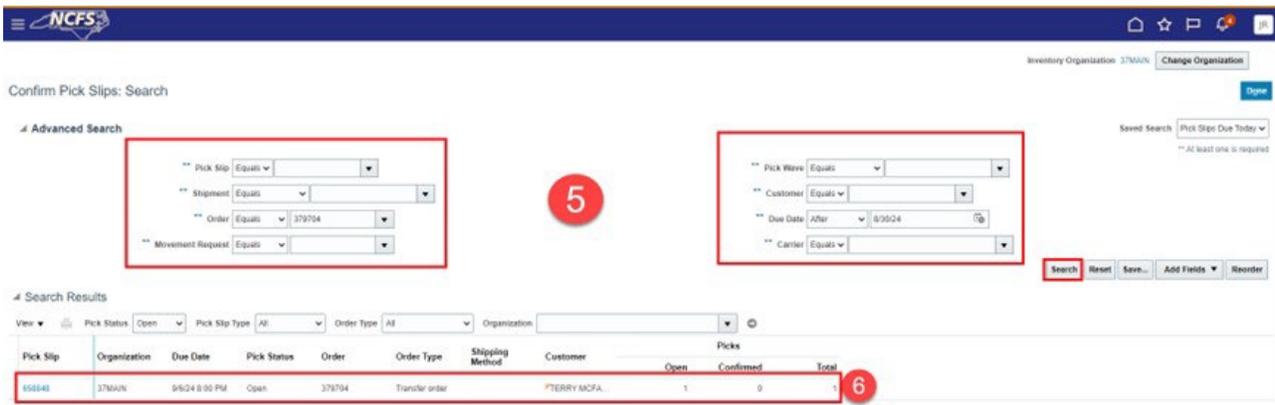
1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, click the **Supply Chain Execution** tab.
3. Select the **Inventory Management** Icon.



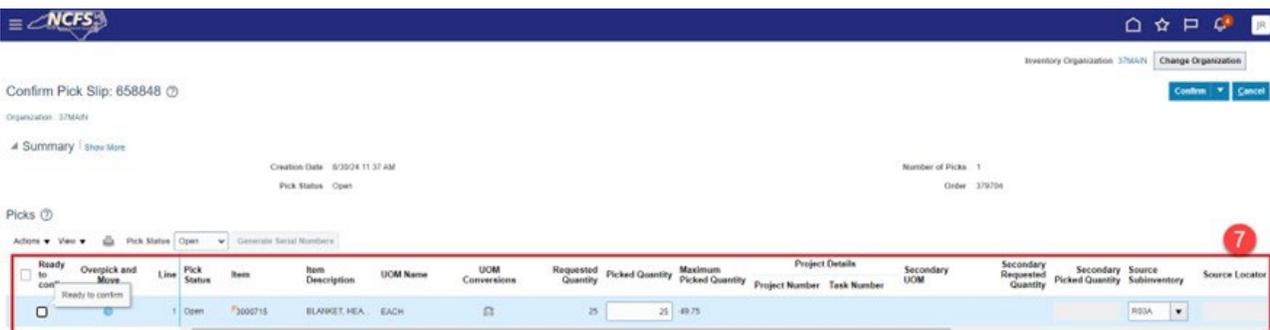
- Click on the **Tasks Menu**, select **Picks** from the **Show Tasks** drop down menu, and then select **Confirm Pick Slips**.



- Enter your Search criteria and then click **Search** to retrieve the **Transfer Order**.
- The **Transfer Order** will populate and then click the **Transfer Order Number**.



- The Confirm Pick Slip screen will appear.



8. Check the **Ready to Confirm** box.
9. Notice the **Requested Quantity** is **25**.
10. The SSP Customer contacted the warehouse and requested an additional 5 quantity on this transfer order. Update the **Picked Quantity** to **30**.
11. *****Notice the Maximum Picked Quantity column is showing 49.75. This is the maximum quantity allowed to pick per the Overpick Tolerance parameter setup. Please remember to only use whole numbers when entering Picked Quantity.*****
12. Click the **Confirm** drop down and select **Confirm and Go to Ship Confirm**.

Confirm Pick Slip: 658848

Organization: 37MAIN

Creation Date: 8/30/24 11:37 AM

Pick Status: Open

Number of Picks: 1

Order: 379704

Line	Pick Status	Item	Item Description	UOM Name	UOM Conversions	Requested Quantity	Picked Quantity	Maximum Picked Quantity
1	Open	3000715	BLANKET, HEAL...	EACH		25	30	49.75

13. The **Edit Shipment** screen will appear.
14. Click the **Ship Confirm** button.

Edit Shipment: 1155389

Shipment: 1155389

Shipping Method: [Dropdown]

Waybill: [Text]

Initial Ship Date: 9/5/24 8:00 PM

Gross Weight: [Text]

Weight UOM: milligram

Volume: [Text]

Volume UOM: millilitre

Shipment Status: Open

Exceptions in Shipment: 0

Ship-from Organization: 37MAIN

Customer: BROS'S MATERIALS MANAGEMENT-ASH

Ship-to Location: BROS'S MATERIALS MANAGEMENT-ASH

Total Shipping Cost Recorded: 0.00 USD

Number of Items: 1

Number of Outer Packing Units: 0

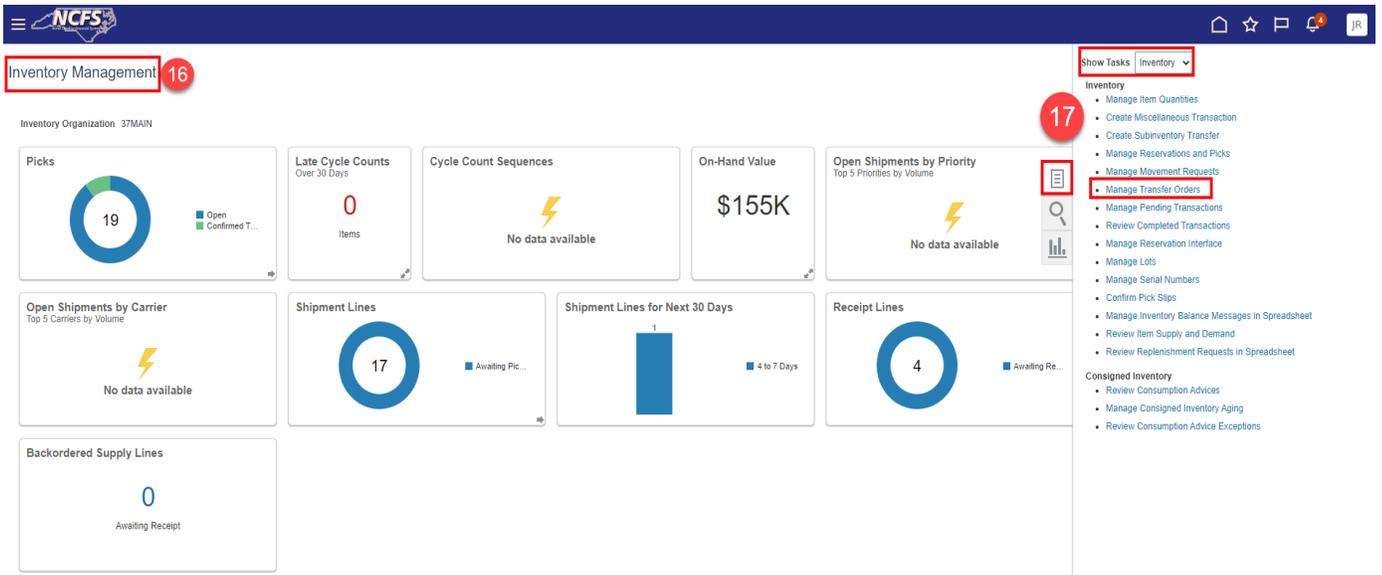
Item	Inventory Controls Missing	Parent Packing Unit	Packing Slip	Packing Slip Status	Packing Unit Type	Order	Order Line	Order Schedule	Order Type	Line Status	Quick Ship Status	Quantity UOM	UOM Conversions	Requested Quantity	Maximum Undershhipment Percentage	Maxin Overshipment Percent
3000715						379704	1		Transfer order	Staged		EACH		25	99	

15. A Confirmation window will appear. Click **OK**.



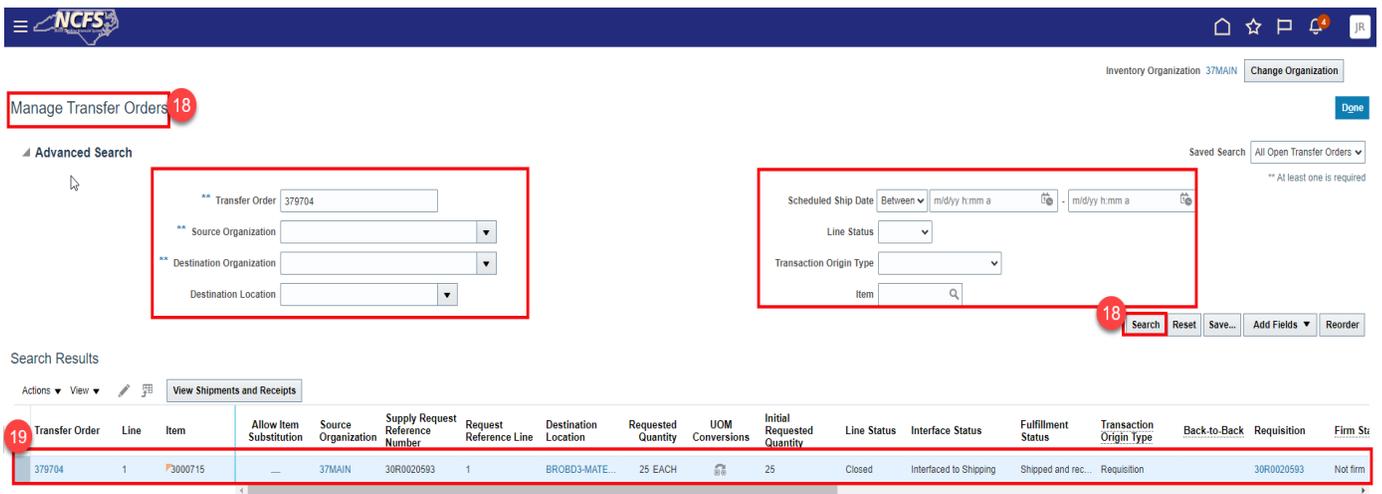
16. Navigate back to **Supply Chain Execution** and **Inventory Management**.

17. Click the **Tasks** menu, under the **Show Tasks** menu, select **Inventory** and then **Manage Transfer Orders**.



18. On the **Manage Transfer Order** screen, enter search criteria, and then click **Search**.

19. The **Transfer Order** will populate.



20. Click the **Transfer Order** number to verify Transfer Order details.

Inventory Organization: 37MAIN

Change Organization

View Shipments and Receipts Submit Cancel

Transaction Origin Type: Requisition
 Description: --- Back-to-back
 Status: Closed
 Interface Status: Interfaced to Shipping

Requisitioning BU: 3000 DHHS MENTAL HEALTH
 Creation Date: 8/30/24 11:26 AM
 Transfer Price: 747.50 USD
 Total Tax: 0.00 USD
 Total Transfer Price: 747.50 USD

Additional Information

Lines

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	Quantity				
														* Requested	Shipped	Received	Delivered	Initial Requested Quantity
1	1 P3000715	---	Closed	Shipped and received	37MAIN		3700SPD...		BROBD3-M...	Expense	9/6/24 8:00 PM	EACH		25	30	30	30	25

Line 1: Billing Details

Distribut	Charge Account	* Requested Quantity (%)	Requested Quantity (EACH)	Amount (USD)	Delivered Quantity (EACH)
1	3000-135400-53220000-300	100	25	747.50	30

21. Click **Cancel** to return to **Manage Transfer Orders** screen.

Inventory Organization: 37MAIN

Change Organization

View Shipments and Receipts Submit Cancel

Wrap-up

Use the steps above to Overpick/Overship inventory item quantities on Transfer Orders.

Additional Resources

Web-Based Training (WBT) and Virtual Instructor-Led Training (vILT)

- INV001: Inventory Inquiry
- INV101: Inventory Agency Manager
- INV103: Warehouse Staff
- INV105: Inventory Management
- INV106: Warehouse Transactions
- INV110: Warehouse Approver

Quick Reference Guides (QRG)

- INV-01 View Completed Inventory Transactions



- INV-14 Create a Pick Wave
- INV-18 Confirm Pick Slip
- INV-36 Perform a Short Pick
- INV-43 Inventory Pick Wave Process
- INV-55 Inventory Transfer Order Deallocation After Pick Confirmation