

#### 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.

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

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

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7. The Confirm Pick Slip screen will appear.

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- 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**.

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

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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.

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Backordered Supply Lines O Awating Receipt						

- 18. On the Manage Transfer Order screen, enter search criteria, and then click Search.
- 19. The **Transfer Order** will populate.

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

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



## 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

