

INV-11 Create, Inquire, and Edit Transfer Orders from Inventory

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. There are 15 steps to complete this process.

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

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

Image



Step 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.

Image

Inventory Management ?

Inventory Organization 424860C

Picks

No data available

Late Cycle Counts
Over 30 Days

0
Items

Cycle Count Sequences

No data available

On-Hand Value

\$531K

Open Shipments by Priority
Top 5 Priorities by Volume

No data available

Open Shipments by Carrier
Top 5 Carriers by Volume

No data available

Select Organization

Inventory Organization
424860C

Apply

424860C

Tasks icon, Inventory icon, Search icon, Bar chart icon

Step 4. Click on the **Tasks** icon. Under the **Inventory** section, click **Manage Item Quantities**.

Image

Inventory Management ?

Inventory Organization 424860C

Picks



No data available

On-Hand Value

\$531K

Open Shipments by Priority

Top 5 Priorities by Volume



Open Shipments by Carrier

Top 5 Carriers by Volume

Shipment Lines

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
- Confirm Pick Slips
- Manage Inventory Balance Messages in Spreadsheet
- Review Item Supply and Demand
- Review Replenishment Requests in Spreadsheet

Consigned Inventory

- Review Consumption Advice Exceptions

Step 5. 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.

Image

Manage Item Quantities ?

Done

Advanced Search

** Item

0002042

Item Description

Starts with

MEN'S BOOT STEEL TOE,

** Organization

424860C

Subinventory

View Item Quantity By

Item

☒ On Hand

☐ Receiving

☐ Inbound

Search

Reset

Save...

Add Fields

Reorder

Saved Search

All Item Quantities

** At least one is required

Search Results ?

View Item Quantity By

Item

Step 6. Review and validate the **On Hand** quantity. Click the *Actions* drop-down choice list and select the **Request Transfer Order** option.

Image

View Item Availability

- Request Movement Request Transfer
- Request Movement Request Issue
- Request Miscellaneous Transaction
- Request Cycle Count
- Manage Material Status
- Request Transfer Order**
- View Supplier Lots
- View Item Cross References

Inventory Organization 424860C [Change Organization](#)

[Done](#)

Saved Search All Item Quantities ▾

Actions ▾ View ▾ [View Item Availability](#)

Item	Quantity			UOM Name
	On Hand	Receiving	Inbound	
Item 0002042 ☆	3			PAIR

Item 0002042: Details

[Item Details](#) [Lot Details](#) [Serial Number Details](#) [Inbound Details](#) [Consigned Details](#)

Item 0002042 Category Name 461816-Safety footwear

Step 7. Enter **Requested Quantity** and **Requested Delivery Date**. Click the **Select Supply Source** button.

Image

Inventory Organization 424860C [Change Organization](#)

Create Supply Request ?

Destination Organization SCOTLAND - CLOTHING WAREHOUSE Supply Request Reference Number INV_57001

View ▾ + × [Select Supply Source](#)

* Item	* Requested Quantity	* UOM	* Supply Source	* Requested Delivery Date	* Supply Details	Status
0002042	1	PAIR		4/19/23 4:01		

Step 8. Select a record from the list of supply sources and click the **OK** button.

Image

Inventory Organization 424860C [Change Organization](#)

Select Supply Source ?

Requested Item 0002042 Requested Delivery Date 4/19/23 Destination Organization SCOTLAND - CLOTHING WAREHOUSE

Requested Quantity 1 UOM PAIR

View ▾

Ranking	Supply Type	Supply Source	Total Available Quantity	UOM
0	Transfer	CENTRAL SUPPLY WAREH	78	PAIR

[OK](#) [Cancel](#)

Step 9. Click the **Submit** button.

Image

Inventory Organization 424860C

Change Organization

Create Supply Request ?

Submit

Cancel

Destination Organization SCOTLAND - CLOTHING WAREHOUSE

Supply Request Reference Number INV_57001

View

+

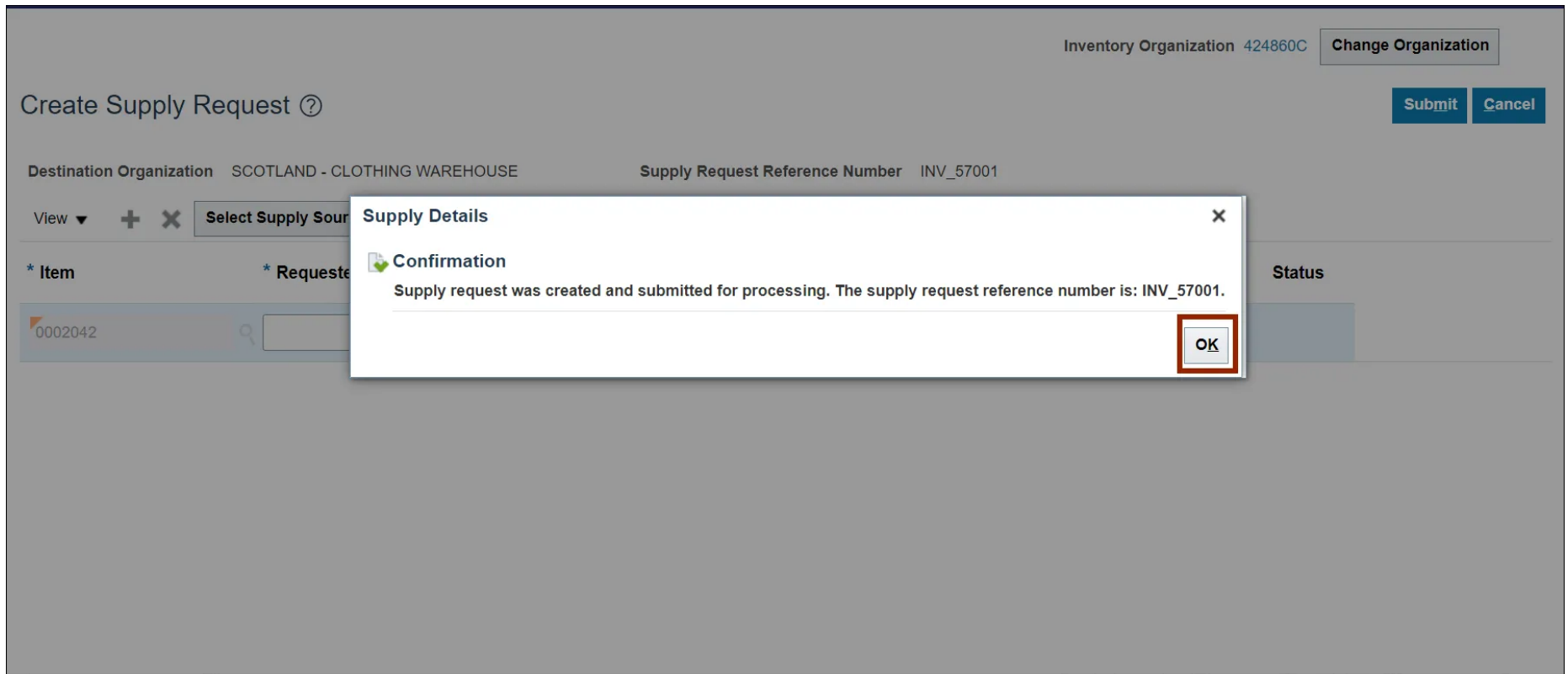
×

Select Supply Source

* Item	* Requested Quantity	* UOM	* Supply Source	* Requested Delivery Date	* Supply Details	Status
0002042		1 PAIR	CENTRAL SUPPLY WAREH	4/19/23 4:01		

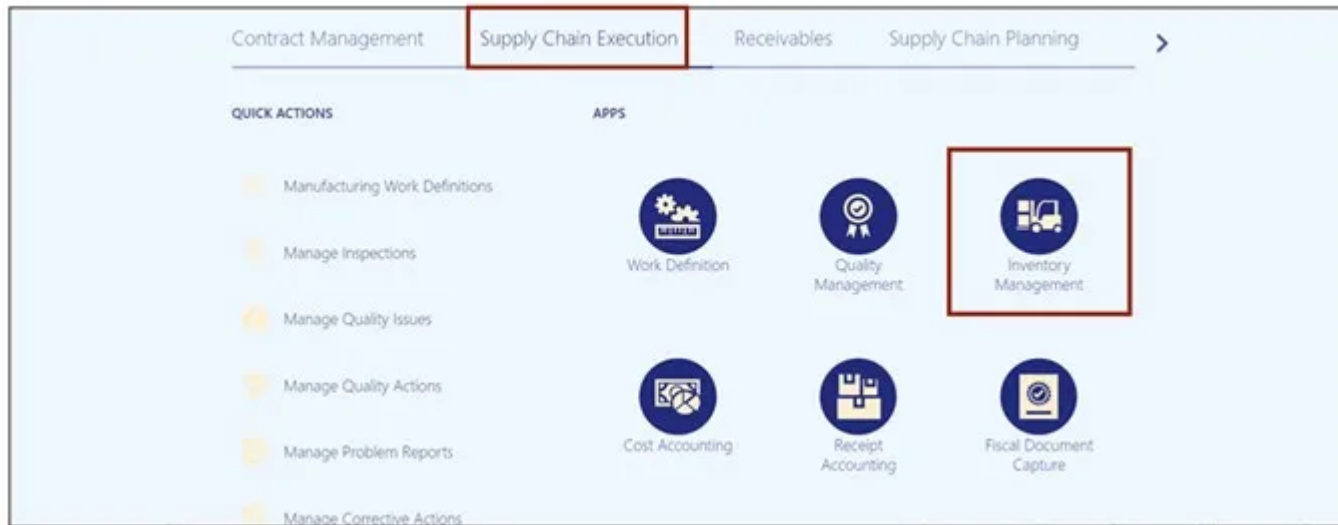
Step 10. Click the **OK** button after the *Supply Details* pop-up appears.

Image



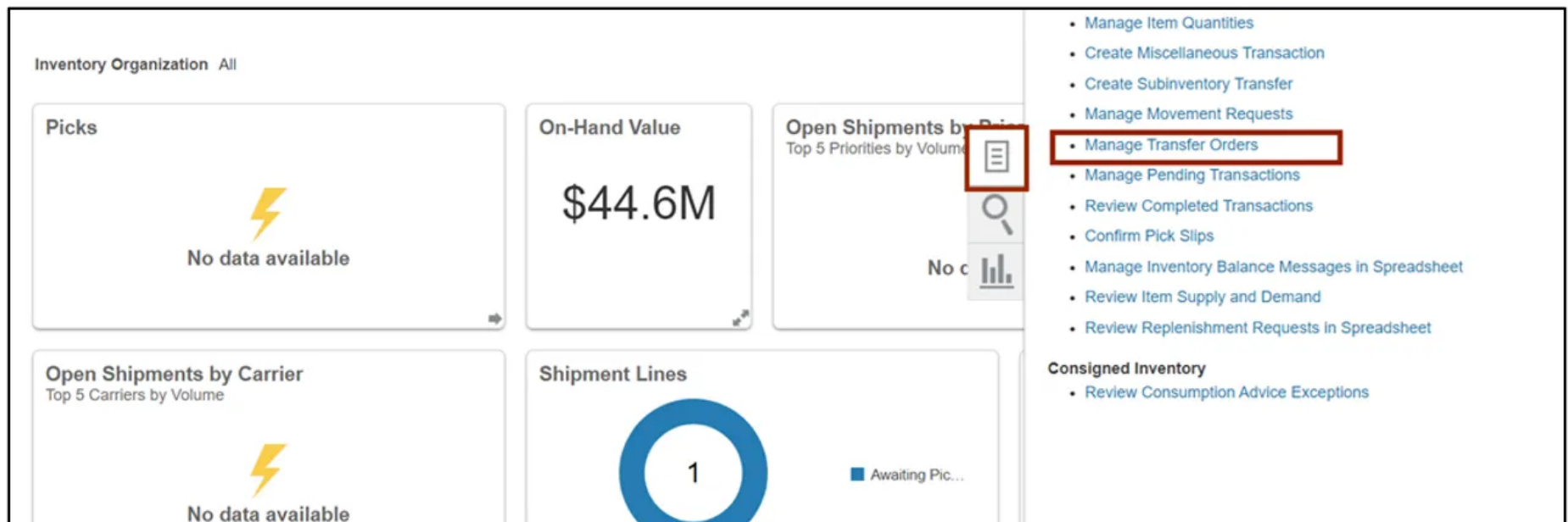
Step 11. To Validate that the Transfer Order has been created, on the **Home** page, under the **Supply Execution** tab, Click the **Inventory Management** app.

Image



Step 12. Click the **Tasks** icon. Under the **Inventory** section, click **Manage Transfer Orders**.

Image



Step 13. In the **Advanced Search** section, enter all mandatory details and click the **Search** button.

Image

Inventory Organization All [Change Organization](#)

Manage Transfer Orders ? [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 Open [▼](#)

Transaction Origin Type

Item

[Search](#) [Reset](#) [Save...](#) [Add Fields ▼](#) [Reorder](#)

Search Results

Actions [▼](#) View [▼](#) [View Shipments and Receipts](#)

Transfer Order	Line	Item	Source Organization	Destination Location	Requested Quantity	Line Status	Interface Status	Fulfillment Status	Transaction Origin Type	Requested Delivery Date
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Step 14. Click the **Transfer Order** link.

Image

Inventory Organization All

Change Organization

Manage Transfer Orders ?

Done

Advanced Search

Saved Search All Open Transfer Orders

Search Results

Actions View

View Shipments and Receipts

Transfer Order	Line	Item	Source Organization	Destination Location	Requested Quantity	Line Status	Interface Status	Fulfillment Status	Transaction Origin Type	Requested Delivery Date
17002	1	0009273	428305R	423010F-1034 ...	2 Pounds	Closed	Interfaced to Shipping	Shipped and rec...	Inventory	1/13/23 12:53 AM

Step 15. 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.

Image

Inventory Organization All Change Organization

Edit Transfer Order: 49002 ?

Social

View Shipments and Receipts

Submit

Cancel

Transaction Origin Type

Inventory

Back-to-back

Description

Status

Open

Interface Status

Interfaced to Shipping

Requisitioning BU

1900 DEPARTMENT OF PUBLIC SAFETY

Creation Date

4/18/23 4:37 PM

Transfer Price

9.20 USD

Total Tax

0.00 USD

Total Transfer Price

9.20 USD

Additional Information

Lines

Actions

View

Cancel Line

Source Organization

All

Destination Organization

All

Line	Item	Line Status	Fulfillment Status	* Source Organization	Destination Location	* Requested Delivery Date	UOM Name	* Requested	Shipped	Received	Delivered	Requisition	Comment
1	0002042	Open	Awaiting fulfillment	421045	424860C-22...	4/19/23 4:01	PAIR	1					

Wrap-Up

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

Additional Resources

- Web-Based Training (WBT)
 - [INV001: Inventory Inquiry](#)

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