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.

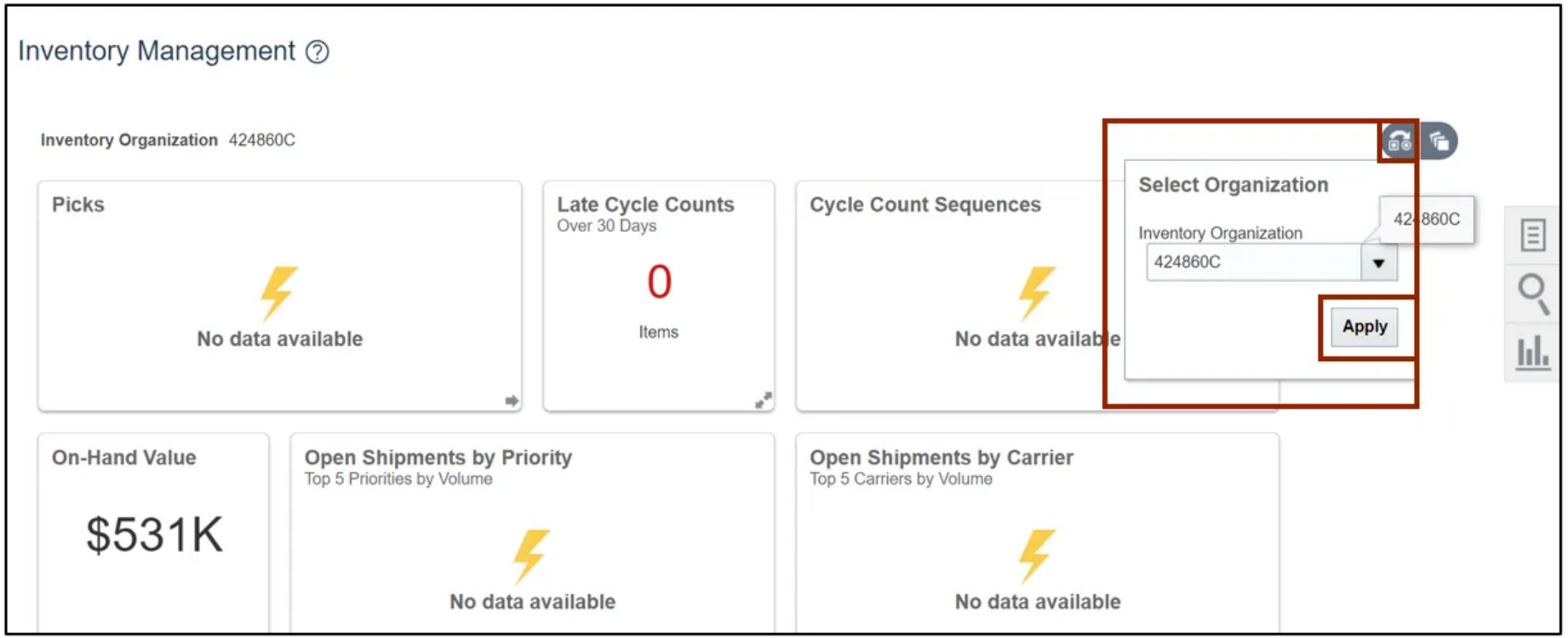
Step 2. On the **Home** page, under the **Supply Execution** tab, click the **Inventory Management** app.

Image



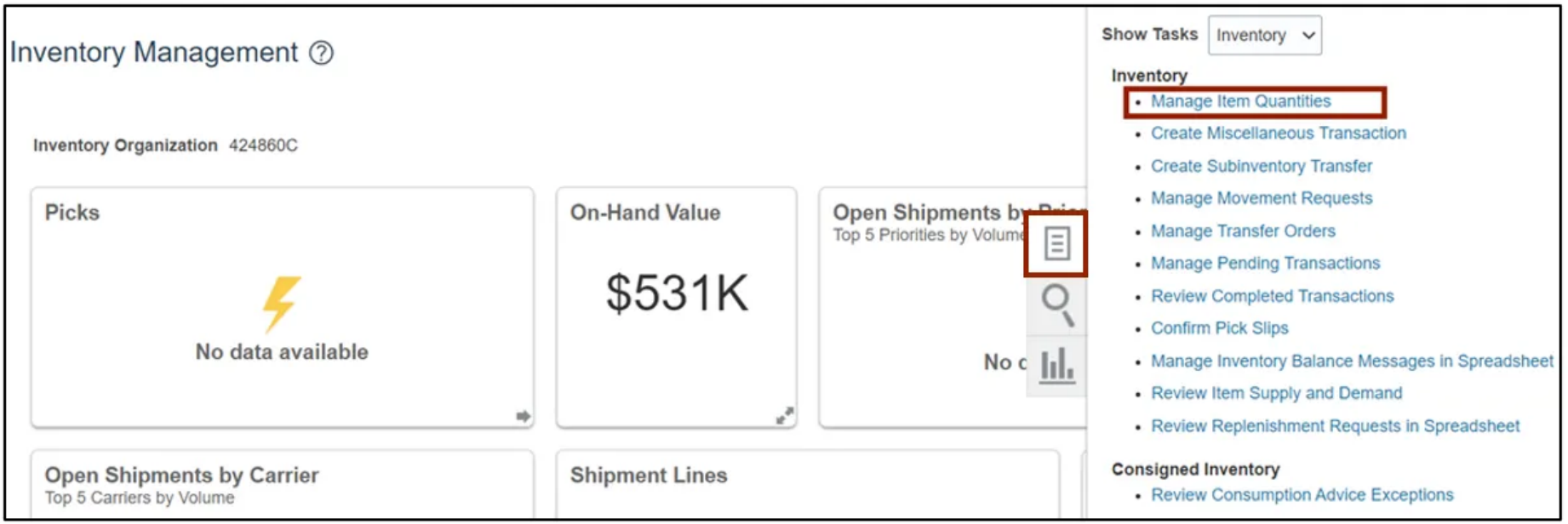
Step 3. On the **Inventory Management** page, click the **View By** icon and enter the **Inventory Organization** number in the *Select Organization* pop-up box. Click the **Apply** button.

Image



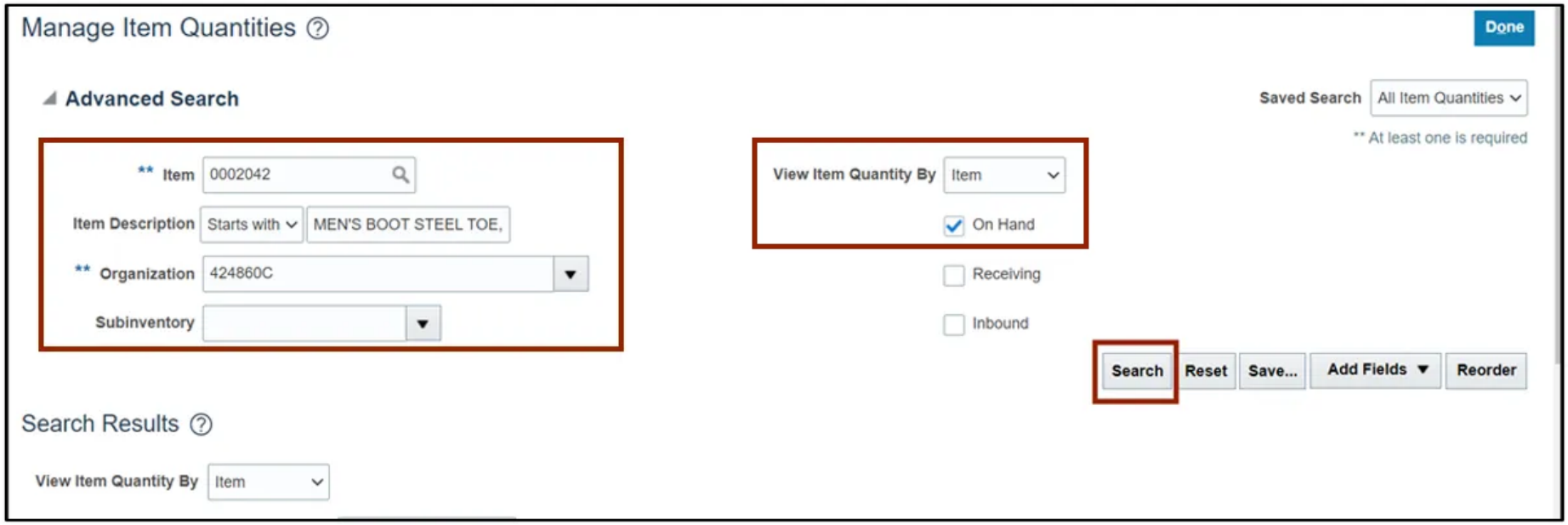
Step 4. Click on the **Tasks** icon. Under the **Inventory** section, click **Manage Item Quantities**.

Image



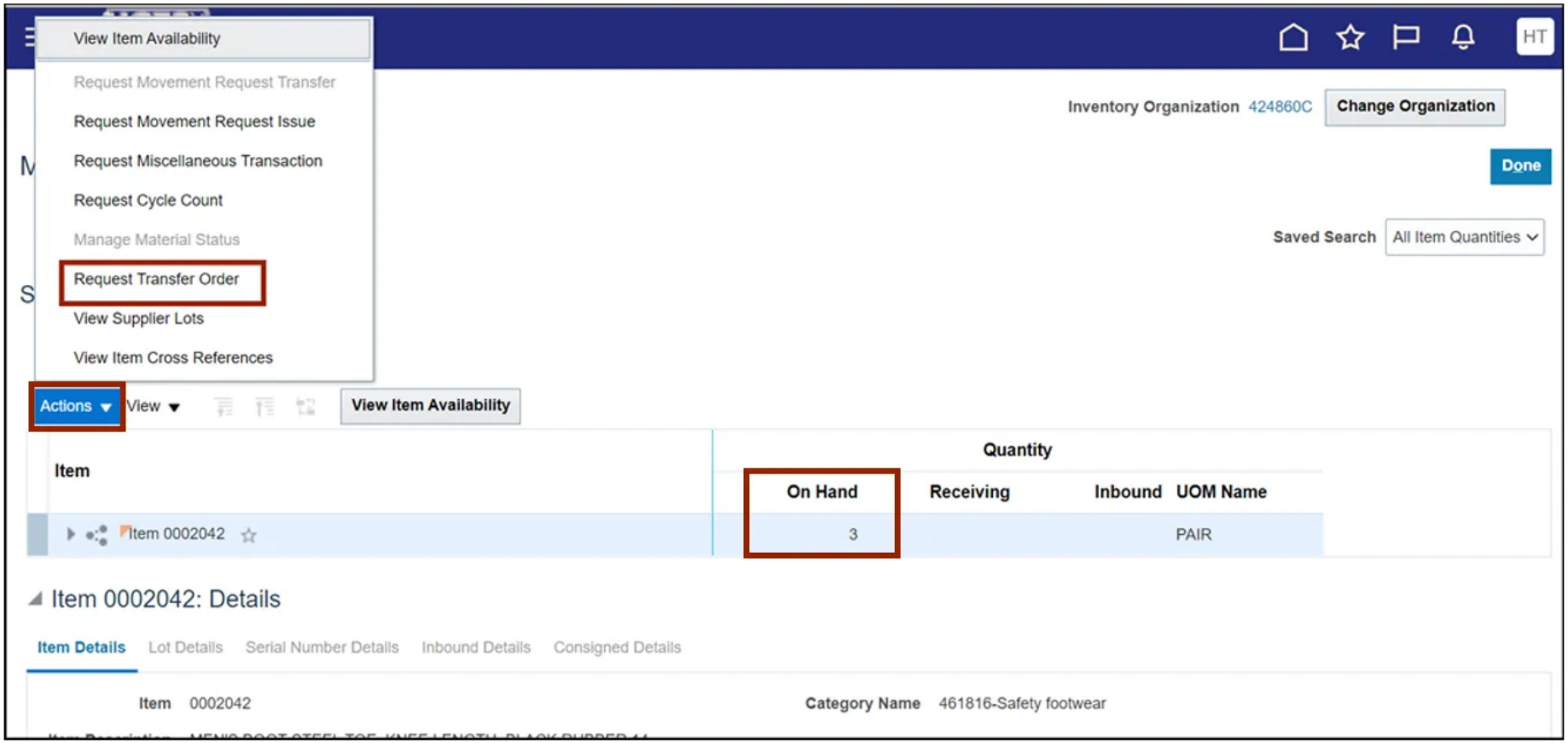
Step 5. In the **Advanced Search** section, enter the mandatory details and select the **On hand** option for **View the Item Quantity By** field. Click the **Search** button.

Image



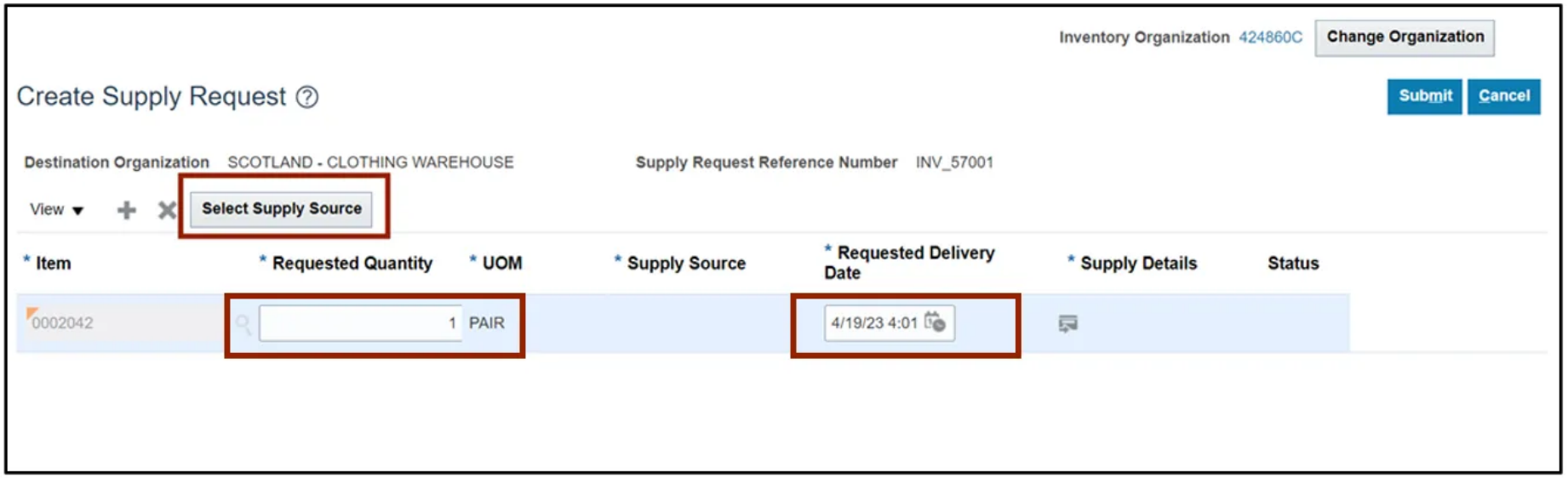
Step 6. Review and validate the **On Hand** quantity. Click the *Actions* drop-down choice list and select the **Request Transfer Order** option.

Image



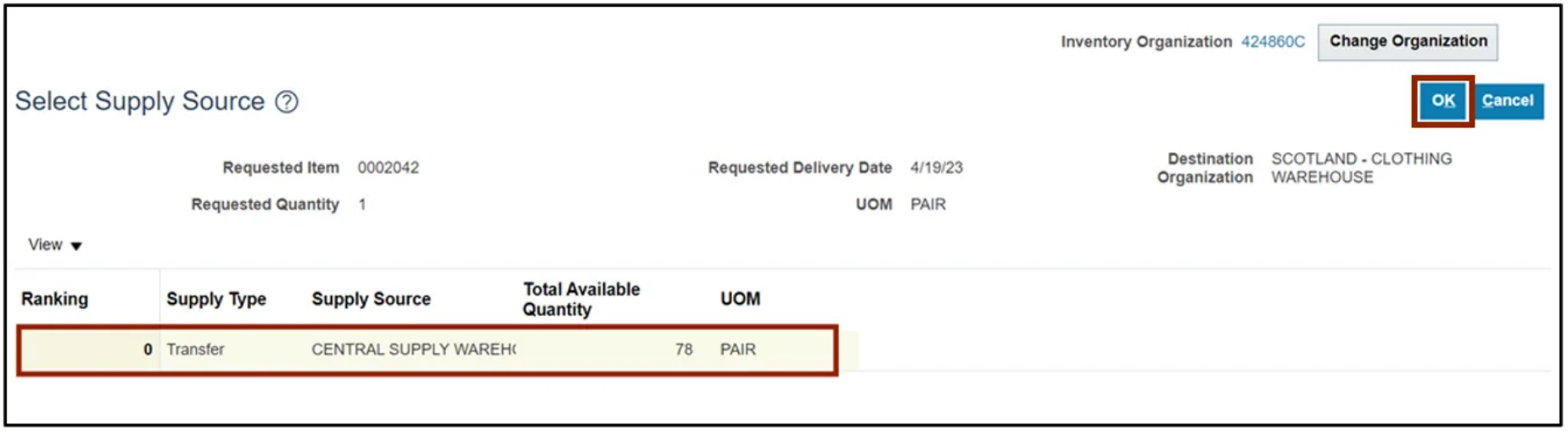
Step 7. Enter **Requested Quantity** and **Requested Delivery Date**. Click the **Select Supply Source** button.

Image



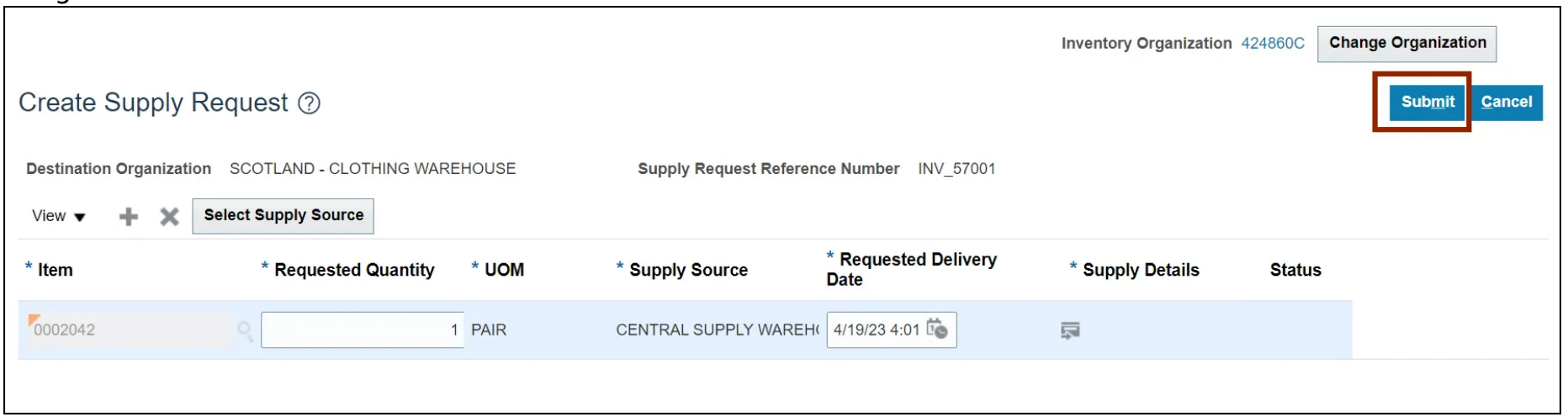
Step 8. Select a record from the list of supply sources and click the **OK** button.

Image



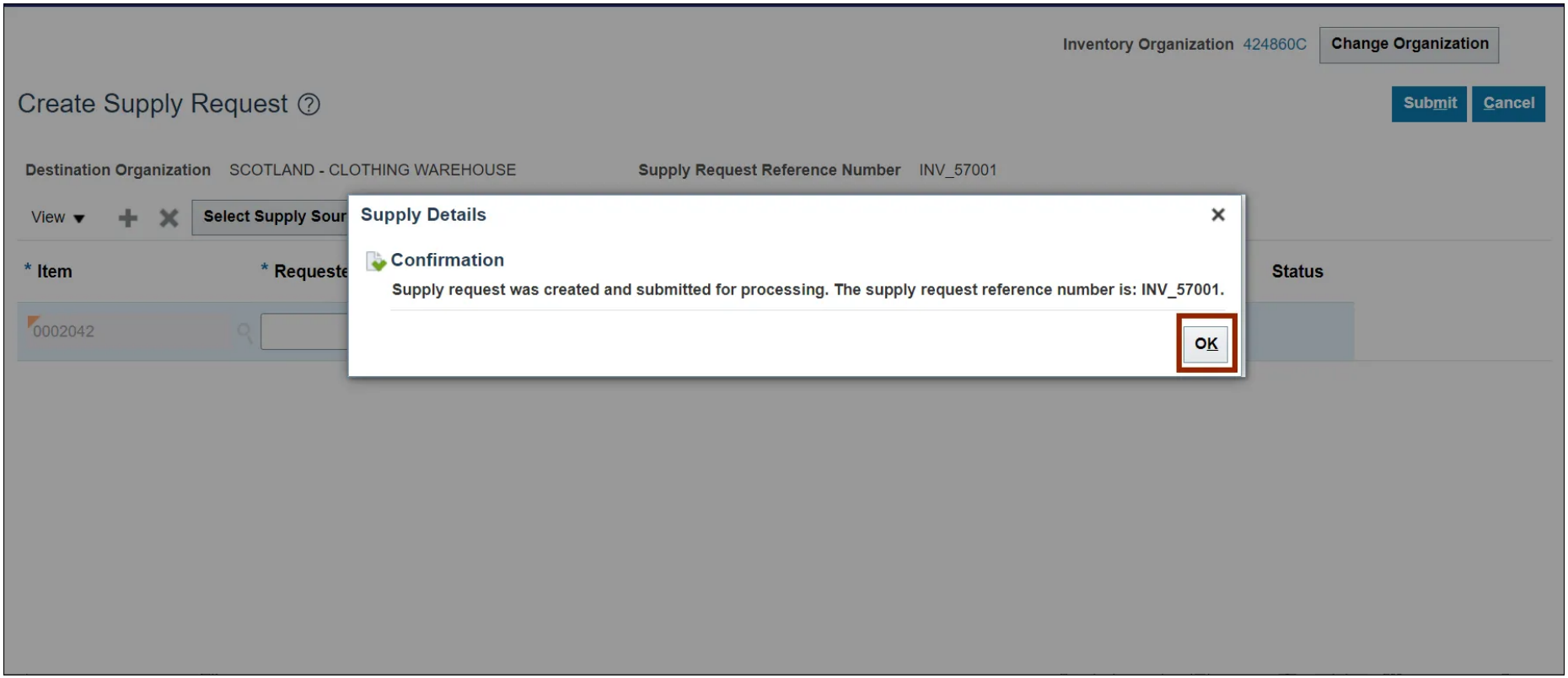
Step 9. Click the **Submit** button.

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

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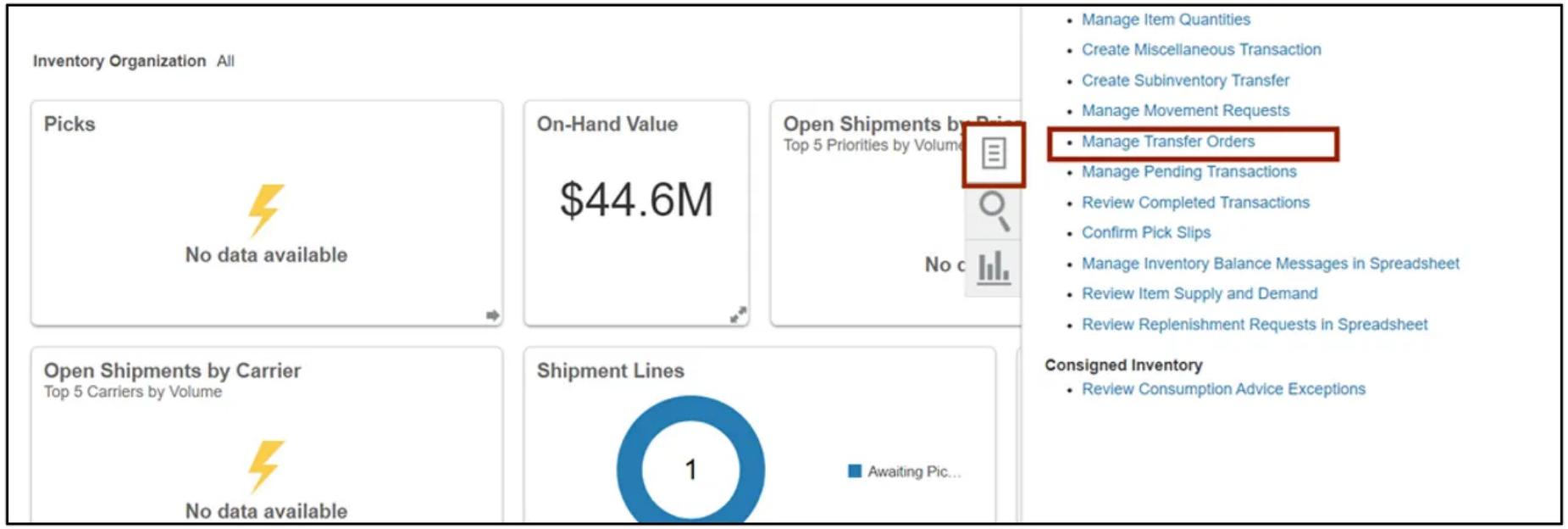
Step 11. To Validate that the Transfer Order has been created, on the **Home** page, under the **Supply Execution** tab, Click the **Inventory Management** app.

Image



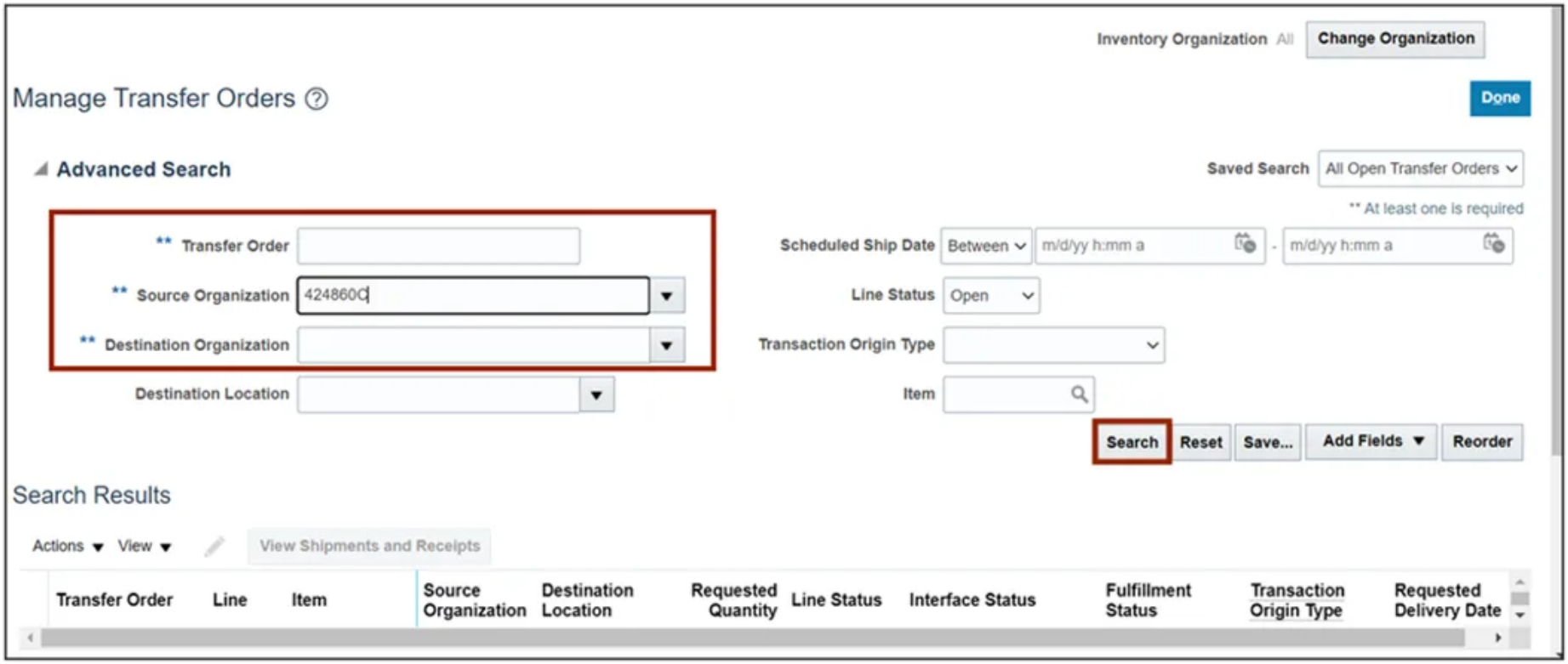
Step 12. Click the **Tasks** icon. Under the **Inventory** section, click **Manage Transfer Orders**.

Image



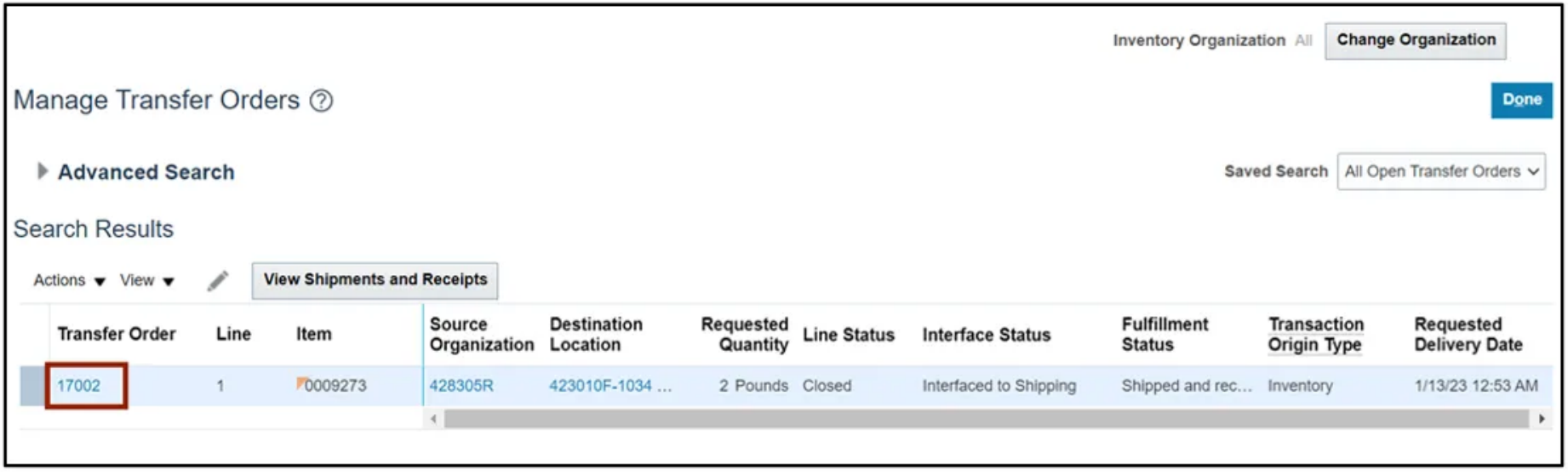
Step 13. In the **Advanced Search** section, enter all mandatory details and click the **Search** button.

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Step 14. Click the **Transfer Order** link.

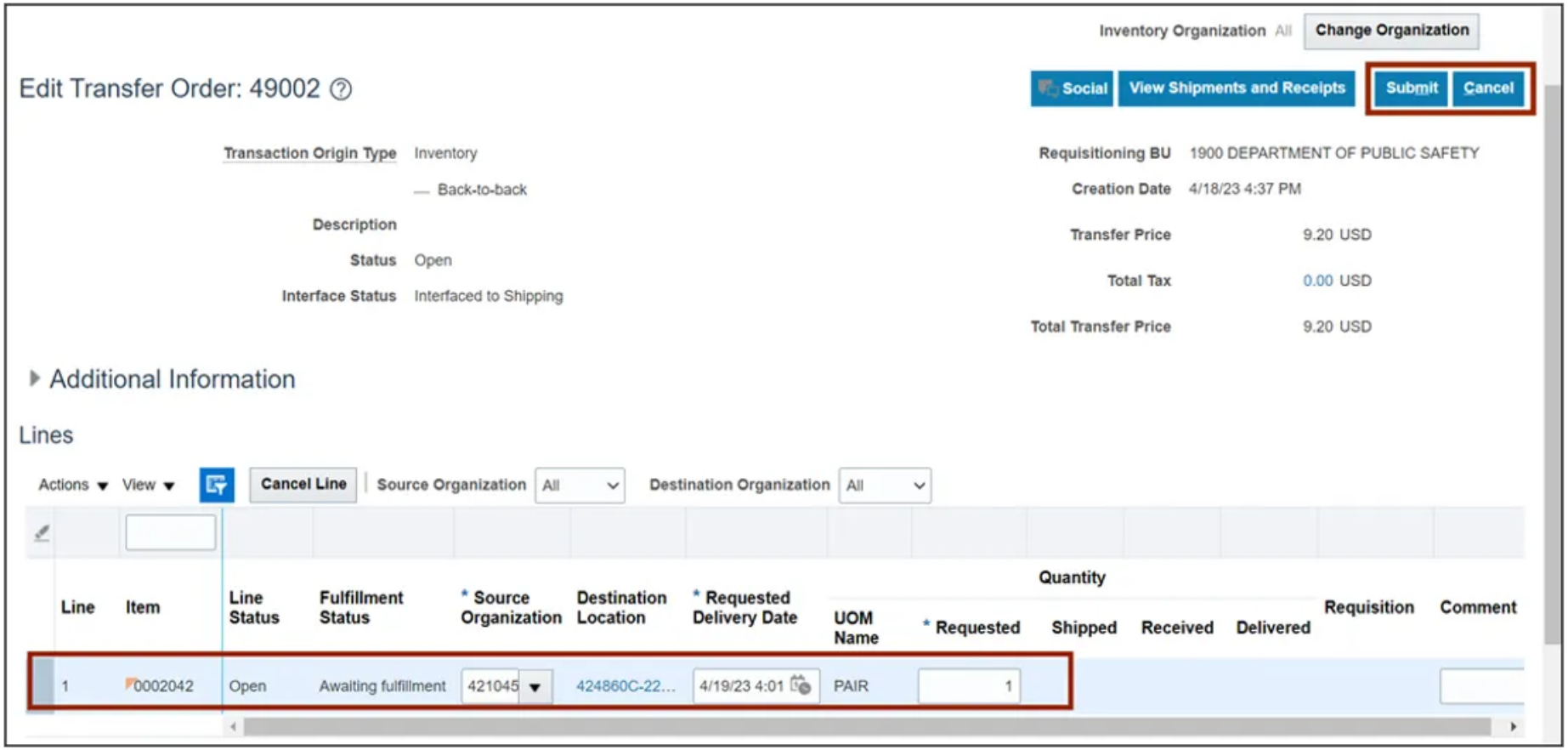
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Step 15. On the **Edit Transfer Order** page, validate that the details are correct. Certain edits to the order can be made here.

When editing is completed, click the **Submit** button. Click the **Cancel** button if no changes are to be made.

Image



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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