

INV-36 Perform a Short Pick

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation on how to Perform a Short Pick in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG explains how to perform a short pick in NCFS.

Perform a Short Pick

To perform a short pick in NCFS, please follow the steps below. There are 13 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 Chain Execution** tab, click the **Inventory Management** app.

Image

Good afternoon, Training Super User 1!

Sales

Contract Management

Supply Chain Execution

Receivables

Supply Chain Plan >

QUICK ACTIONS



Manufacturing Work Definitions



Manage Inspections



Manage Quality Issues



Manage Quality Actions



Manage Problem Reports

APPS



Work Definition



Quality Management



Inventory Management



Cost Accounting



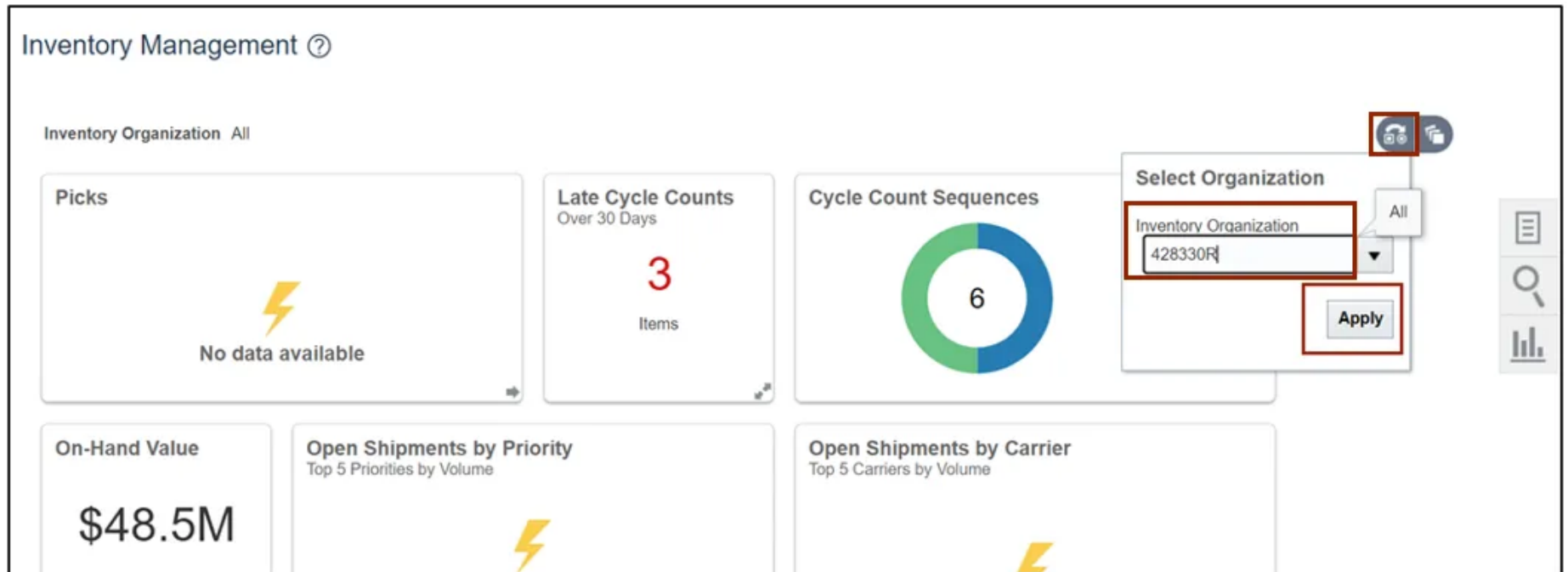
Receipt Accounting



Supply Orchestration

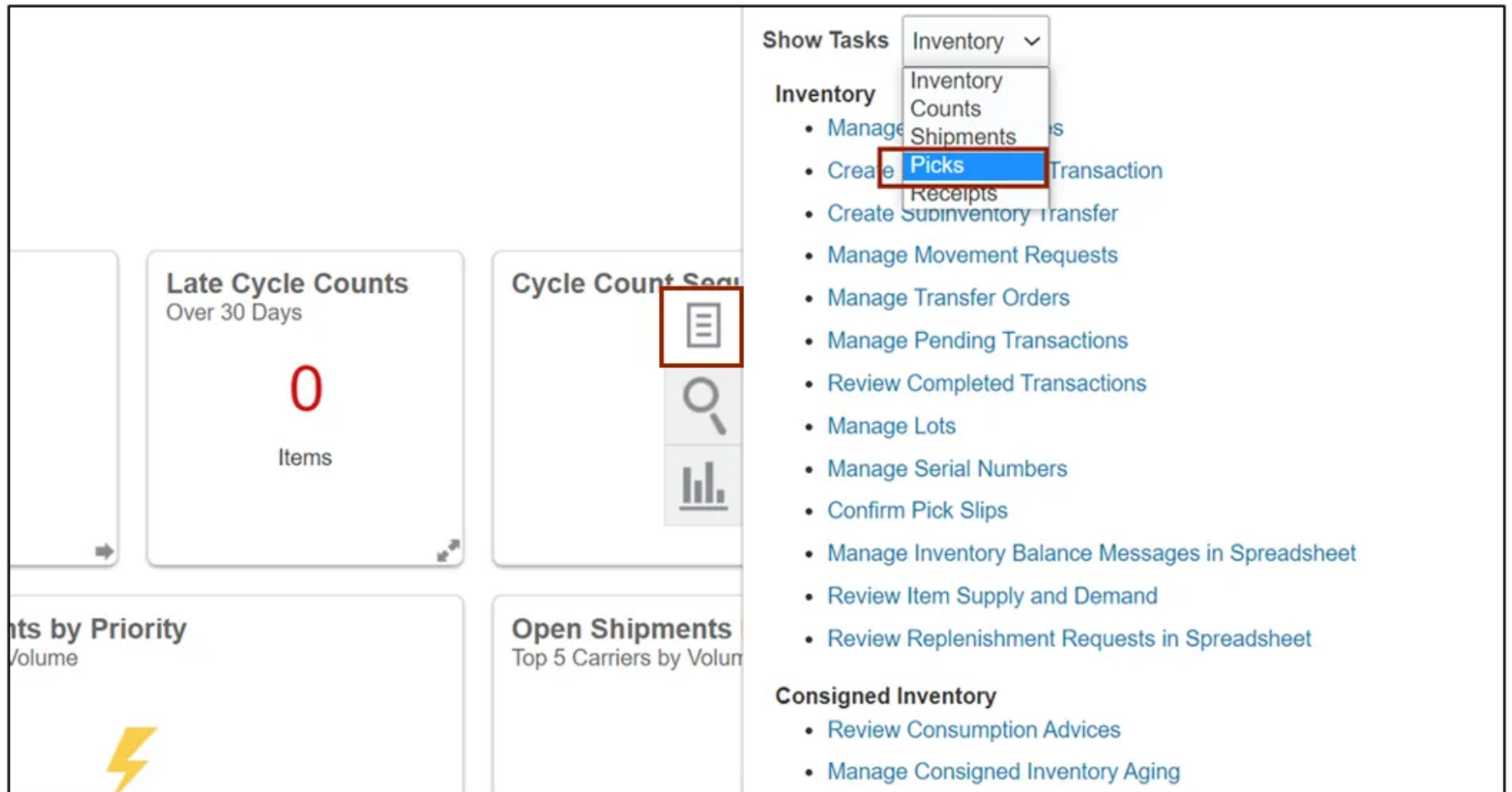
Step 3. On the **Inventory Management** page, click the **View by** icon and enter the **Organization ID**. Click the **Apply** button.

Image



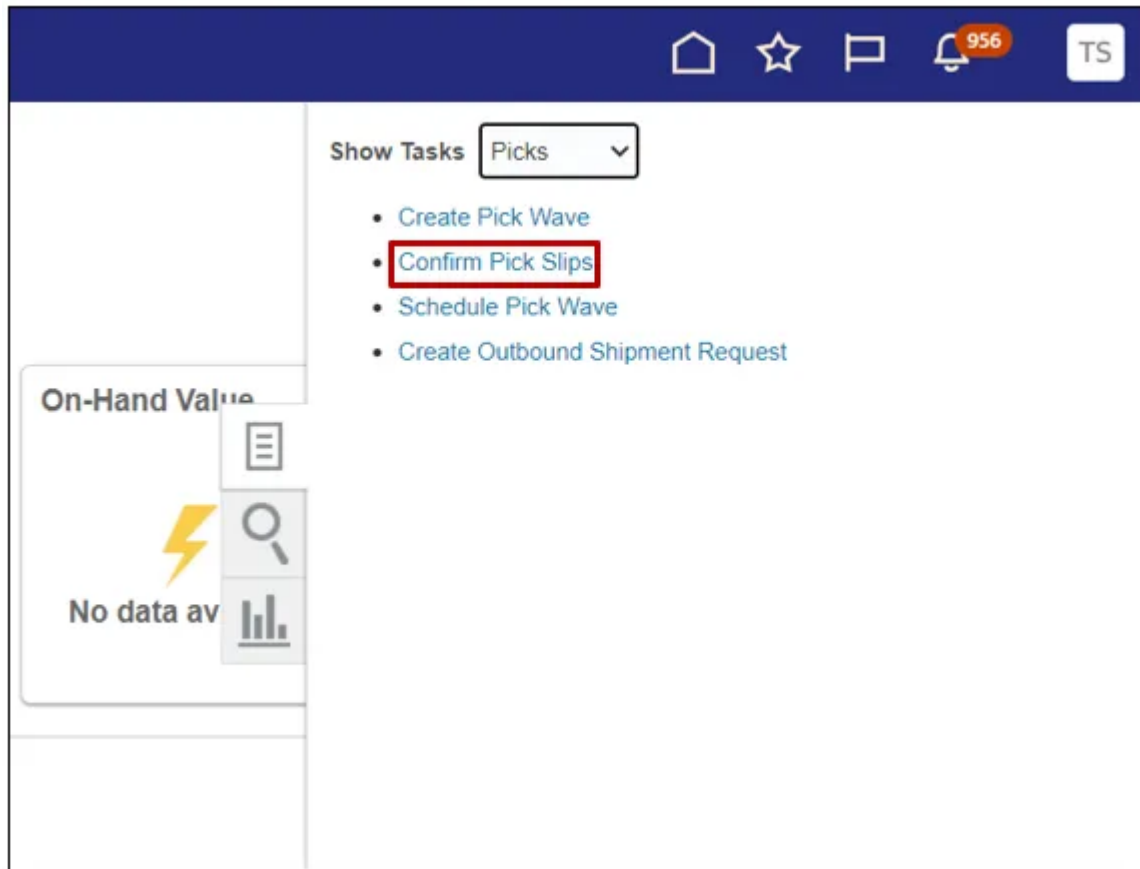
Step 4. Click the **Tasks** icon and select **Picks** from the **Show Tasks** drop-down choice list.

Image



Step 5. Click **Confirm Pick Slips**.

Image



Step 6. Search for the pick wave to be short picked.

In this example, all pick waves for the week of 10/2 was searched on. Click **Search**.

Image

Inventory Organization: All [Change Organization](#)

Confirm Pick Slips: Search [Done](#)

Advanced Search

** Pick Slip: Equals
 ** Shipment: Equals
 ** Order: Equals
 ** Movement Request: Equals

** Pick Wave: Equals
 ** Customer: Equals
 ** Due Date: Between 10/2/23 10/7/23
 ** Carrier: Equals

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

Search Results

Step 7. Search results will appear towards the bottom on the screen. Find the pick wave and click the **Pick Slip** link.

Image

Search Results

View Pick Status: Open Pick Slip Type: All Order Type: All Organization:

Pick Slip	Organization	Due Date	Pick Status	Order	Order Type	Shipping Method	Customer	Picks		
								Open	Confirmed	Total
142009	423100C	10/4/23 12:59 PM	Open	121015	Transfer order		INV Warehouse...	1	0	1
142011	423100C	10/4/23 12:59 PM	Open	121007	Transfer order		INV Warehouse...	1	0	1
142016	423100C	10/5/23 12:40 PM	Open	123015	Transfer order		INV Warehouse...	1	0	1
142028	423100C	10/7/23 12:31 PM	Open	123051	Transfer order		INV Warehouse...	1	0	1
144007	4210451	10/2/23 12:29 PM	Open	121003	Transfer order		INV Warehouse...	1	0	1
146010	423100C	10/6/23 9:44 AM	Open	123022	Transfer order		INV Warehouse...	1	0	1
146013	423100C	10/6/23 12:48 PM	Open	123039	Transfer order		INV Warehouse...	1	0	1
147010	4210451	10/3/23 12:43 PM	Open	122003	Transfer order	INTERNAL_A...	INV Warehouse...	1	0	1
147011	4210451	10/3/23 1:08 PM	Open	122022	Transfer order	INTERNAL_A...	INV Warehouse...	1	0	1
147013	4210451	10/6/23 12:27 AM	Open	122033	Transfer order	INTERNAL_A...	Training Super 2	1	0	1

Step 8. On the **Confirm Pick Slip** screen, change the picked quantity to less than the requested quantity and check mark the **Ready to Confirm** box.

Image

Confirm Pick Slip: 147013 ⓘ

Organization 4210451

Summary Show More

Creation Date 10/6/23 12:28 AM Number of Picks 1
Pick Status Open Order 122033

Picks ⓘ

Actions View Pick Status Open Generate Serial Numbers

☐ Ready to confirm	Line	Pick Status	Item	Item Description	UOM Name	Requested Quantity	Picked Quantity	Source Subinventory	Source Locator	Lot
☒	1	Open	0001871	SWEET & LOW,...	CASE	10	5	01A1		

Step 9. Click **Confirm**.

Image

The screenshot shows a web application interface for inventory management. At the top, there is a dark blue header bar with icons for home, star, flag, and a notification bell with '956' next to it, and a 'TS' button. Below the header, the main area has a light blue background. On the right side, there is a 'Change Organization' button. In the center, there is a confirmation dialog box with a red border. The dialog box has a 'Confirm' button (highlighted with a red rectangle) and a 'Cancel' button. Below the 'Confirm' button, there are two options: 'Confirm and Go to Ship Confirm' and 'Confirm and Close'. The main area also displays 'Inventory Organization All' and 'Number of Picks 1'. Below this, it shows 'Order 122033'. At the bottom, there is a table with columns: 'Picked Quantity', 'Source Subinventory', 'Source Locator', 'Lot', 'From Serial Number', and 'To Serial Number'. The first row of the table has a value of '5' in the 'Picked Quantity' column, '01A1' in the 'Source Subinventory' column, and a dropdown arrow in the 'Source Locator' column. The rest of the row is highlighted in yellow.

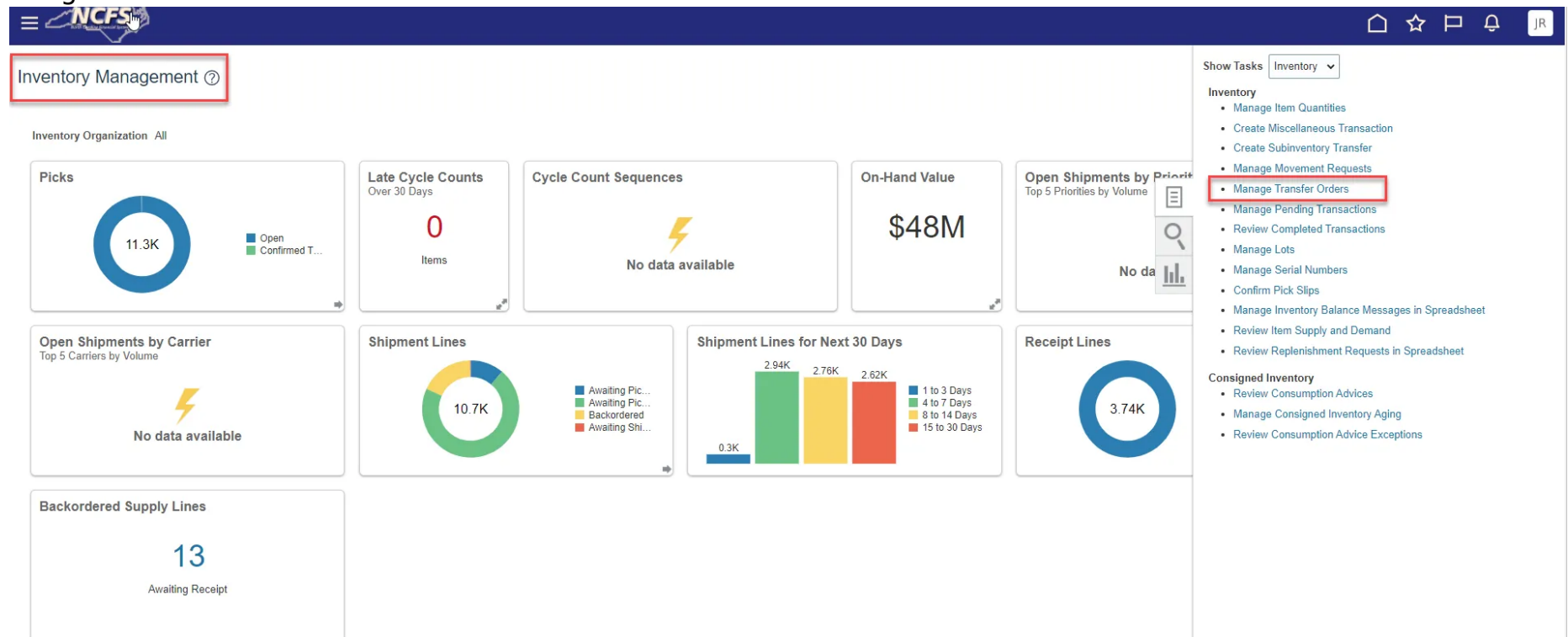
There are two options after the Inventory Short Pick is completed:

- The first option is to let the remaining item requested quantity go to Backordered status to be fulfilled once additional item quantity is received on a purchase order. In this case nothing further needs to be done by the user.
- The second option is to not issue the remaining item requested quantity and to remove it from Backordered status by updating the Transfer Order Quantity.

Follow the below steps for Option B. Updating Transfer Order Quantity on Short Picked Item

Step 10. Go to **Inventory Management** and select **Manage Transfer Orders** from tasks menu.

Image



Step 11. Enter the **Transfer Order number**, click **Search** and then click on the **Transfer order number**.

Image

Inventory Organization All [Change Organization](#)

Done

Manage Transfer Orders ?

Advanced Search

** Transfer Order

122033

** Source Organization

** Destination Organization

Destination Location

Scheduled Ship Date

Between

m/d/yy h:mm a

-

m/d/yy h:mm a

Line Status

Open

Transaction Origin Type

Item

Search

Reset

Save...

Add Fields

Reorder

** At least one is required

Actions View

View Shipments and Receipts

Step 12. Find the Item(s) that were Short Picked and reduce the **Requested Quantity** to match the Pick Confirmed Quantity. Click **Submit**.

Image

NCFS

Inventory Organization All [Change Organization](#)

Edit Transfer Order: 122033

[Social](#) [View Shipments and Receipts](#) [Submit](#) [Cancel](#)

Transaction Origin Type Inventory
 — Back-to-back
 Description
 Status Open
 Interface Status Interfaced to Shipping

Requisitioning BU 5200 DEPARTMENT OF ADULT CORRECTION
 Creation Date 11/3/23 5:48 AM
 Transfer Price 11,122.64 USD
 Total Tax 0.00 USD
 Total Transfer Price 11,122.64 USD

► Additional Information

Lines

Actions View [Cancel Line](#) Source Organization All Destination Organization All

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	Shipped	Received	Del
27	27 0001871	☐	Open	Awaiting fulfillment	428305		423010F		423010F-10...	Inventory	12/8/23 5:26	Pounds		5			

Step 13. The Requested Quantity will now match the Pick Confirmed Quantity. This item is now ready for Ship Confirm.

Wrap-Up

Perform a Short Pick using the steps above in NCFS.

Additional Resources

- Virtual Instructor-Led Training (vILT)
 - [INV 105: Warehouse Management](#)
 - [INV 106: Warehouse Transaction Support](#)

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