

INV-60 Inventory Overpick/Overship Feature

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

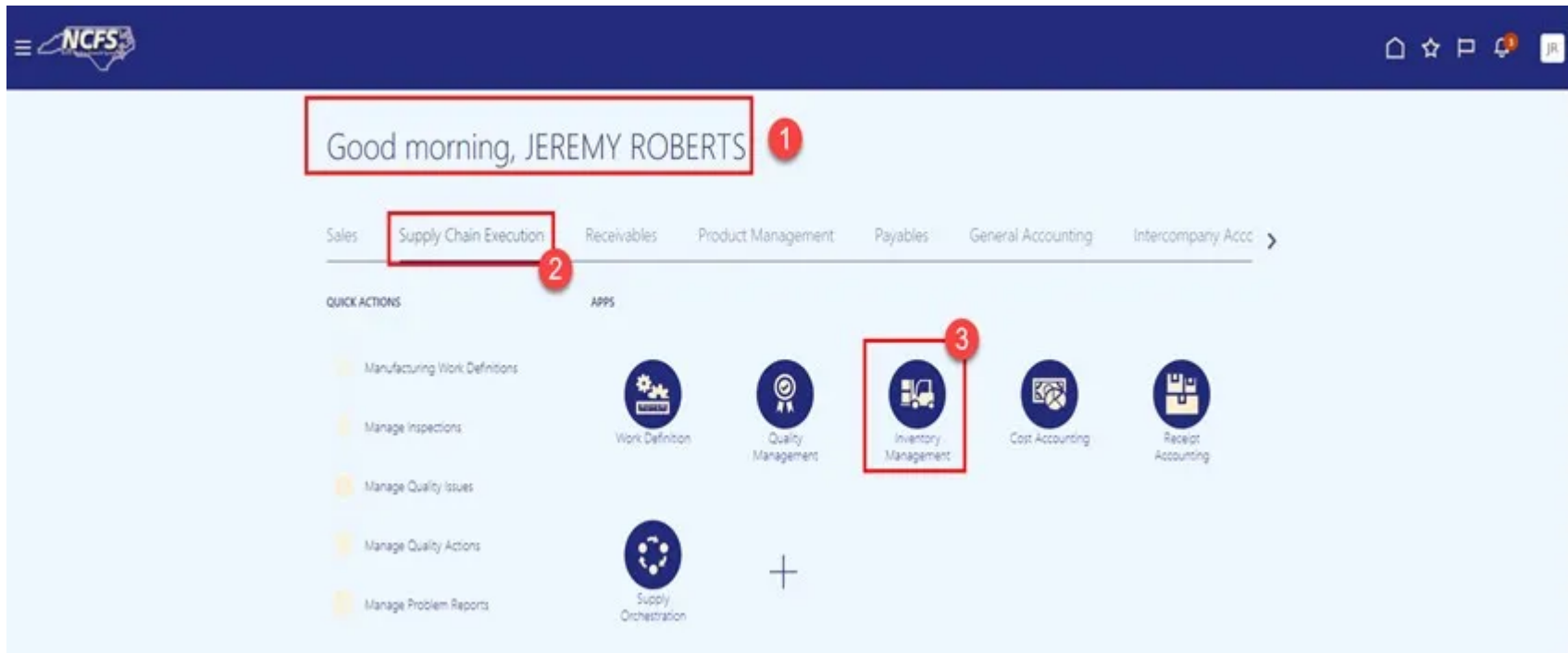
To complete an Overpick/Overship of an Inventory Transfer Order in NCFS, please follow the steps below. There are 21 steps to complete this process.

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

Step 2. On the **Home** page, click the **Supply Chain Execution** tab.

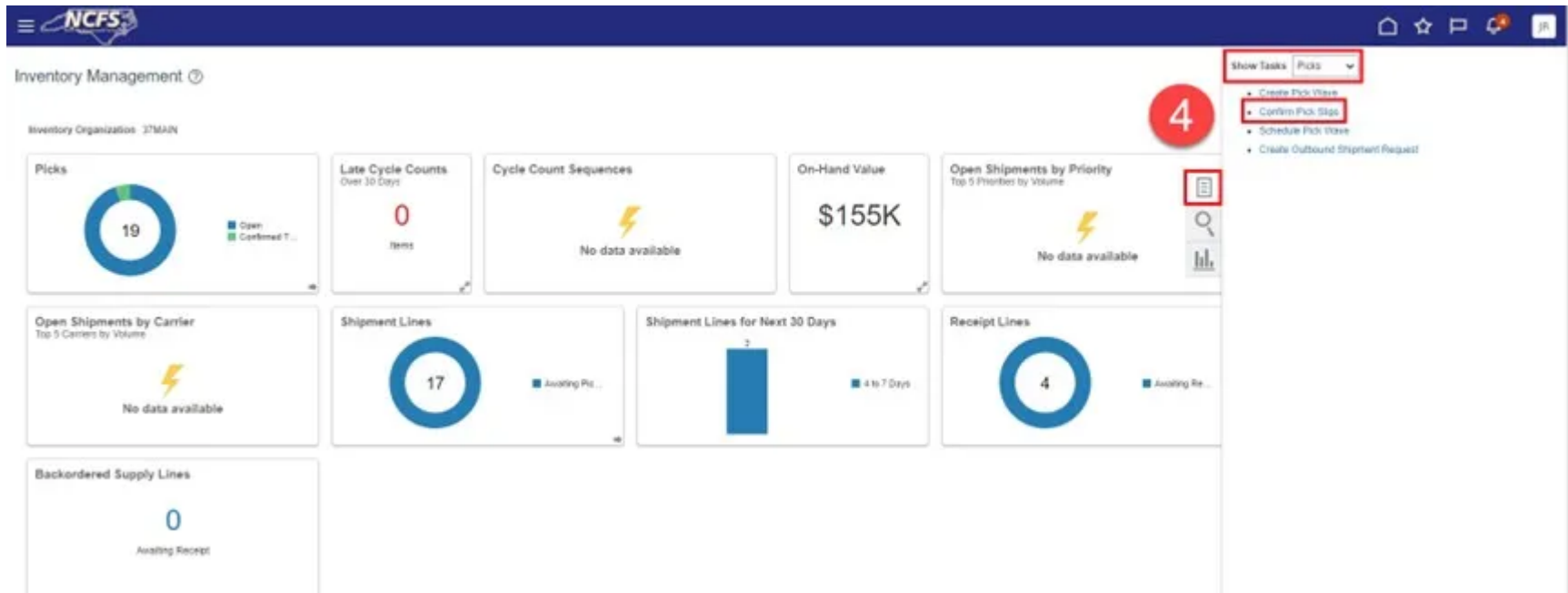
Step 3. Select the **Inventory Management** app.

Image



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

Image



Step 5. Enter your **Search** criteria and then click **Search** to retrieve the **Transfer Order**.

Step 6. The **Transfer Order** will populate and then click the **Transfer Order Number**.

Image

Confirm Pick Slips: Search

Advanced Search

Pick Slip: Equits
 Shipment: Equits
 Order: 379704
 Movement Request: Equits

Pick Wave: Equits
 Customer: Equits
 Due Date: After 8/25/24
 Carrier: Equits

Search Results

View: Pick Status: Open Pick Slip Type: All Order Type: All Organization: 37MAIN

Pick Slip	Organization	Due Date	Pick Status	Order	Order Type	Shipping Method	Customer	Picks		
								Open	Confirmed	Total
658848	37MAIN	9/5/24 8:00 PM	Open	379704	Transfer order	PERRY MOFA...	1	0	1	

Step 7. The **Confirm Pick Slip** screen will appear.

Image

Confirm Pick Slip: 658848

Organization: 37MAIN

Summary

Creation Date: 8/29/24 11:37 AM
 Pick Status: Open
 Number of Picks: 1
 Order: 379704

Picks

Actions: View: Pick Status: Open Generate Serial Numbers

Ready to confirm	Overpick and Move	Line	Pick Status	Item	Item Description	UOM Name	UOM Conversions	Requested Quantity	Picked Quantity	Maximum Picked Quantity	Project Details		Secondary UOM	Secondary Requested Quantity	Secondary Picked Quantity	Source Subinventory	Source Locator
											Project Number	Task Number					
☐	☐	1	Open	73005715	BLANKET, HEA	EACH	25	25	49.75							R03A	

Step 8. Check the **Ready to Confirm** box.

Step 9. Notice the **Requested Quantity** is 25.

Step 10. The SSP Customer contacted the warehouse and requested an additional 5 quantity on this transfer order. Update the **Picked Quantity** to **30**.

Step 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.**

Step 12. Click the **Confirm** drop-down and select **Confirm and Go to Ship Confirm**.

Image

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	Project Details	Secondary UOM	Secondary Requested Quantity	Secondary Picked Quantity	Source Subinventory	Source Locator
1	Open	3000715	BLANKET, HEA...	EACH		25	30	49.75					R03A	

Step 13. The **Edit Shipment** screen will appear.

Step 14. Click the **Ship Confirm** button.

Image

NCFS

Inventory Organization: 37MAIN [Change Organization](#)

Edit Shipment: 1155389 13

Shipment

Shipment: 1155389

Shipping Method:

Waybill:

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

Gross Weight:

Weight UOM: milligram

Volume:

Volume UOM: millilitre

Shipment Status: Open

Exceptions in Shipment: 0

Ship-from Organization: 37MAIN

Customer:

Ship-to Location: BRO603-MATERIALS MANAGEMENT-NBH

Total Shipping Cost Recorded: 0.00 USD

Number of Items: 1

Number of Outer Packing Units: 0

[Show Details](#)

Lines

Actions

Summary

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 Undershipment Percentage	Maximum Overshipment Percent
3000715						379704	1		Transfer order	Staged		EACH		25	99	

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

Image



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

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

Image

The screenshot displays the NCFS Inventory Management dashboard. The top navigation bar includes the NCFS logo and a user profile 'JR'. A red box labeled '16' highlights the 'Inventory Management' link in the top left. The dashboard features several widgets: 'Picks' (19 total, with a donut chart for Open and Confirmed Transactions), 'Late Cycle Counts' (0 items), 'Cycle Count Sequences' (No data available), 'On-Hand Value' (\$155K), 'Open Shipments by Priority' (No data available), 'Open Shipments by Carrier' (No data available), 'Shipment Lines' (17 total, with a donut chart for Awaiting Pick), 'Shipment Lines for Next 30 Days' (1 total, with a bar chart for 4 to 7 Days), 'Receipt Lines' (4 total, with a donut chart for Awaiting Receipt), and 'Backordered Supply Lines' (0 total, Awaiting Receipt). A sidebar on the right, labeled '17', shows a 'Show Tasks' dropdown set to 'Inventory'. Under the 'Inventory' section, 'Manage Transfer Orders' is highlighted with a red box. Other tasks listed include Manage Item Quantities, Create Miscellaneous Transaction, Create Subinventory Transfer, Manage Reservations and Picks, Manage Movement Requests, Manage Pending Transactions, Review Completed Transactions, Manage Reservation Interface, Manage Lots, Manage Serial Numbers, Confirm Pick Slips, Manage Inventory Balance Messages in Spreadsheet, Review Item Supply and Demand, Review Replenishment Requests in Spreadsheet, Consigned Inventory, Review Consumption Advices, Manage Consigned Inventory Aging, and Review Consumption Advice Exceptions.

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

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

Image

NCFS

Inventory Organization 37MAIN

Change Organization

Done

Manage Transfer Orders

Advanced Search

** Transfer Order

379704

** Source Organization

** Destination Organization

Destination Location

Scheduled Ship Date

Between

m/d/yy h:mm a

-

m/d/yy h:mm a

Line Status

Transaction Origin Type

Item

Search

Reset

Save...

Add Fields

Reorder

Search Results

View Shipments and Receipts

Transfer Order	Line	Item	Allow Item Substitution	Source Organization	Supply Request Reference Number	Request Reference Line	Destination Location	Requested Quantity	UOM Conversions	Initial Requested Quantity	Line Status	Interface Status	Fulfillment Status	Transaction Origin Type	Back-to-Back	Requisition	Firm Status
379704	1	3000715		37MAIN	30R0020593	1	BROBD3-MATE...	25 EACH		25	Closed	Interfaced to Shipping	Shipped and rec...	Requisition		30R0020593	Not firm

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

Image

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](#)

First Published

Tue, 09/17/2024

Last Updated

Thu, 09/18/2025

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