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.

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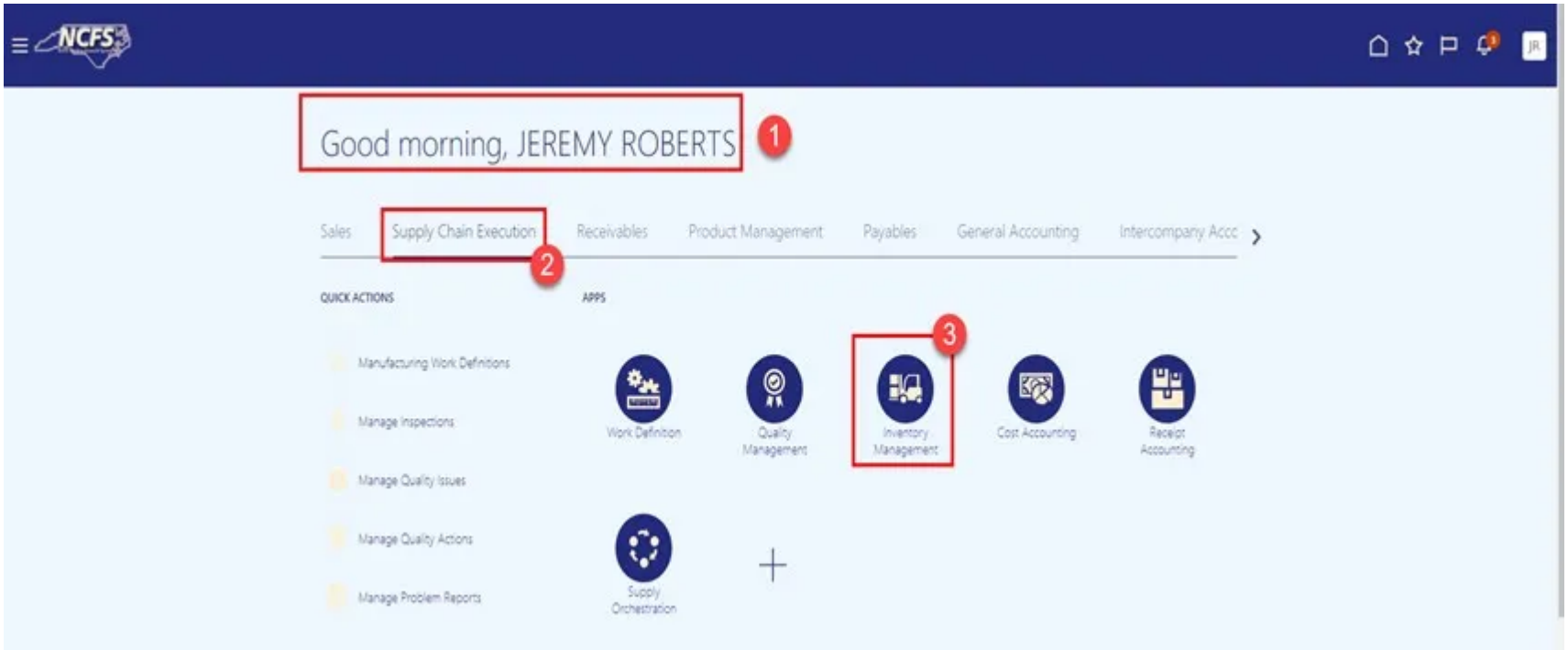

Step 4. Click on the **Tasks Menu**, select **Picks** from the **Show Tasks** drop-down menu, and then select **Confirm Pick Slips**.

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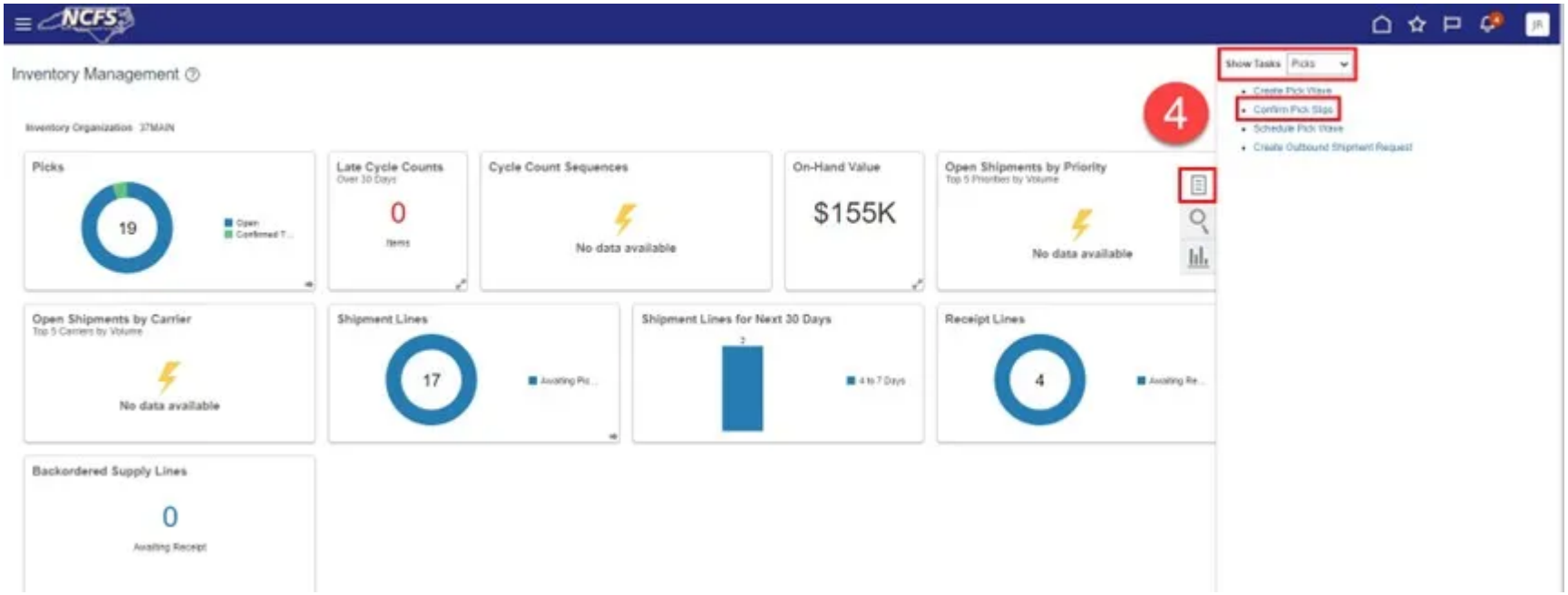
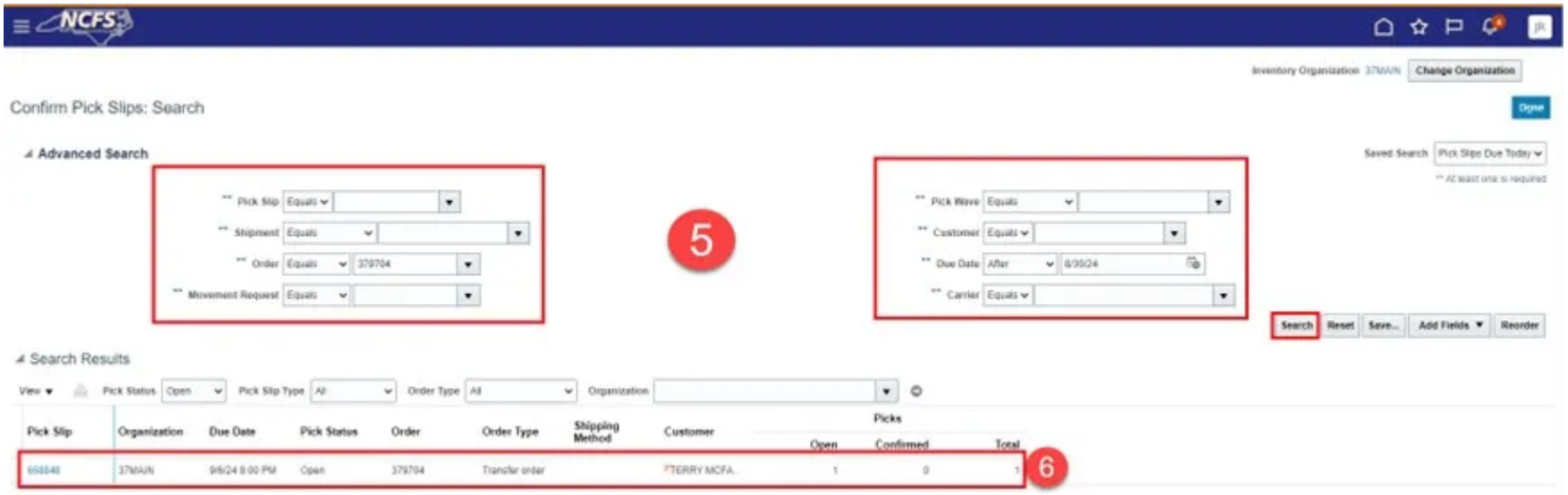


Step 5. Enter your **Search** criteria and then click **Search** to retrieve the **Transfer Order**.

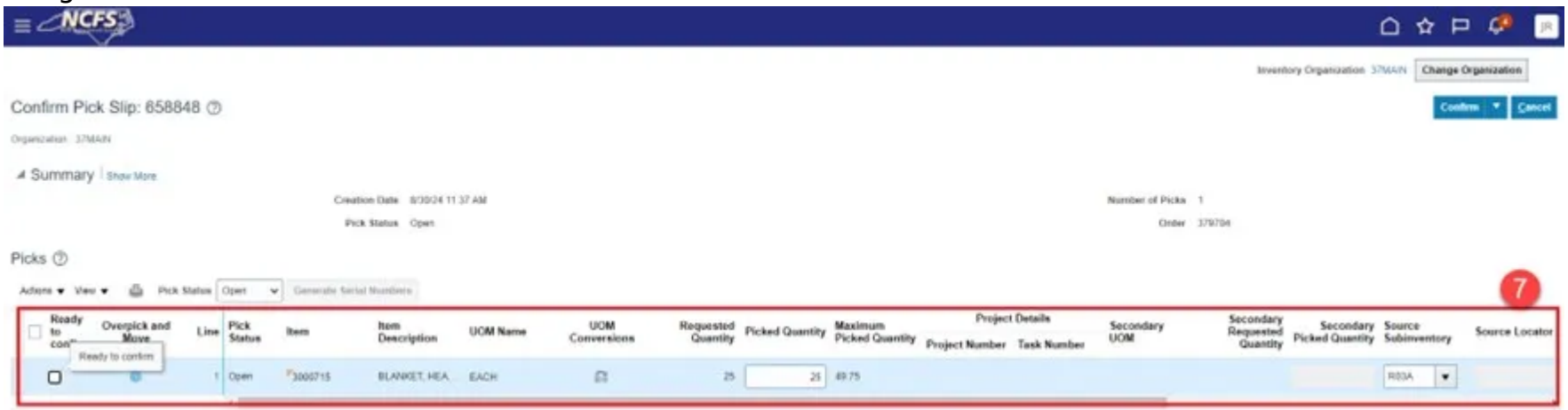
Step 6. The **Transfer Order** will populate and then click the **Transfer Order Number**.

Image



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

Image



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

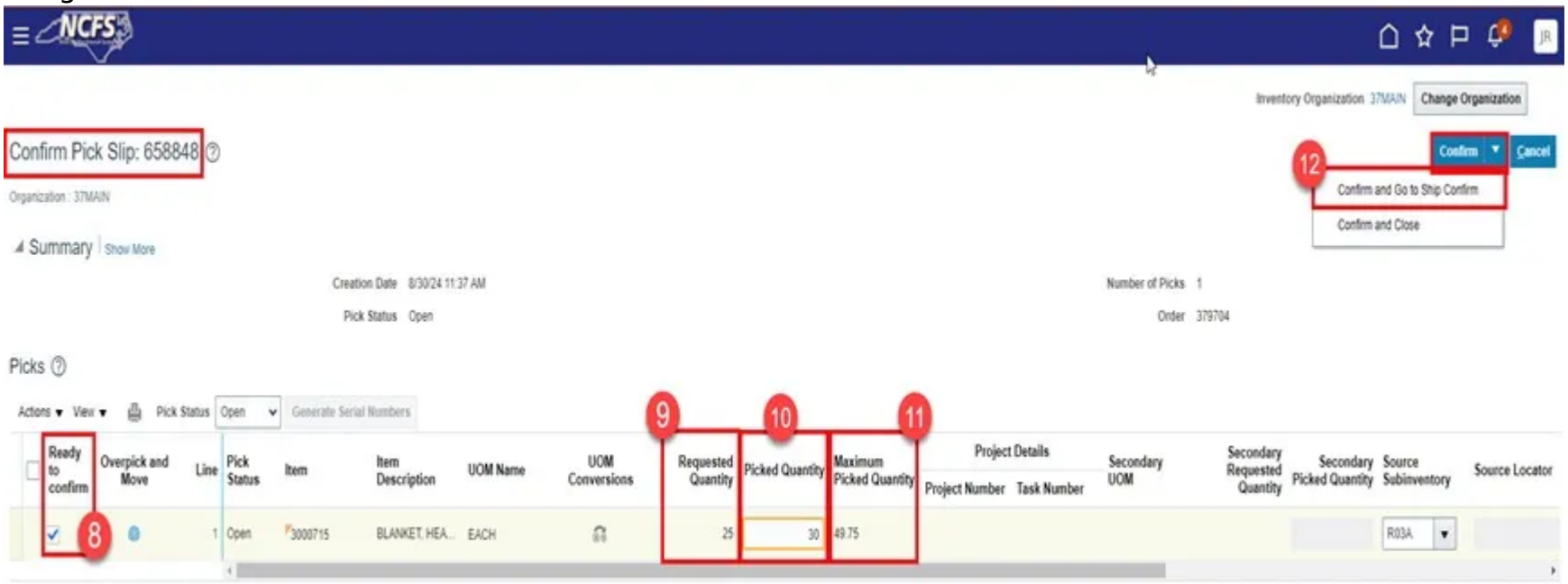
Step 9. Notice the **Requested Quantity** is **25**.

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**.

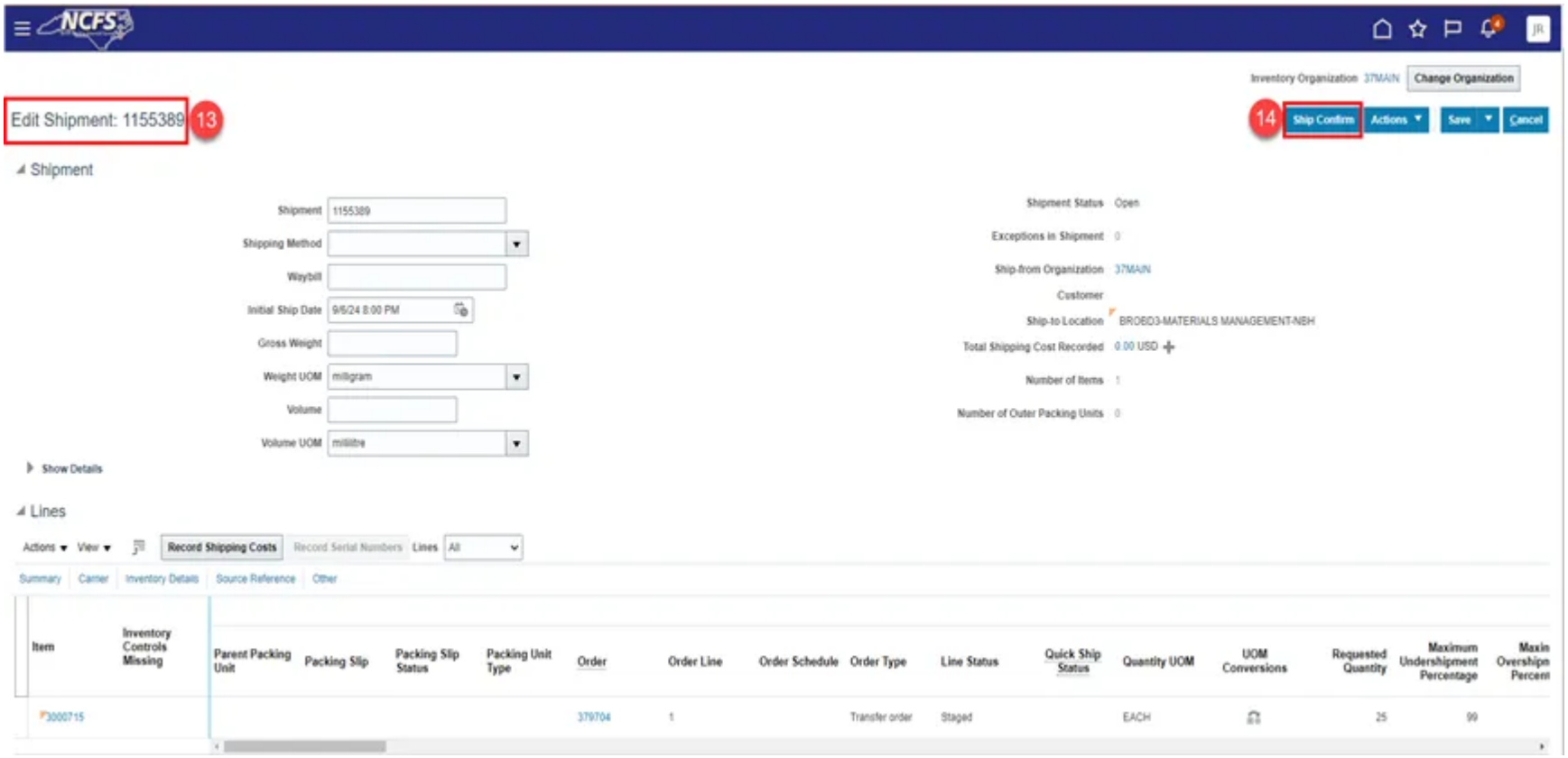
Image



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

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

Image



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**.

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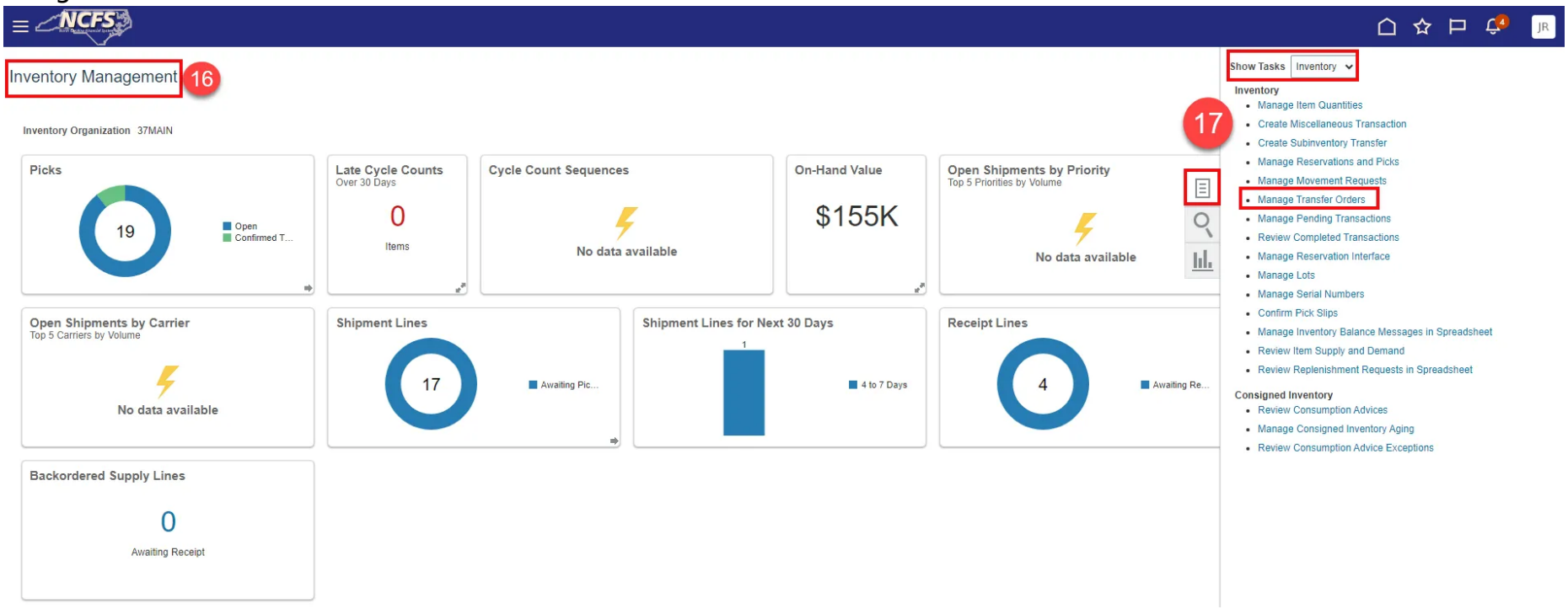
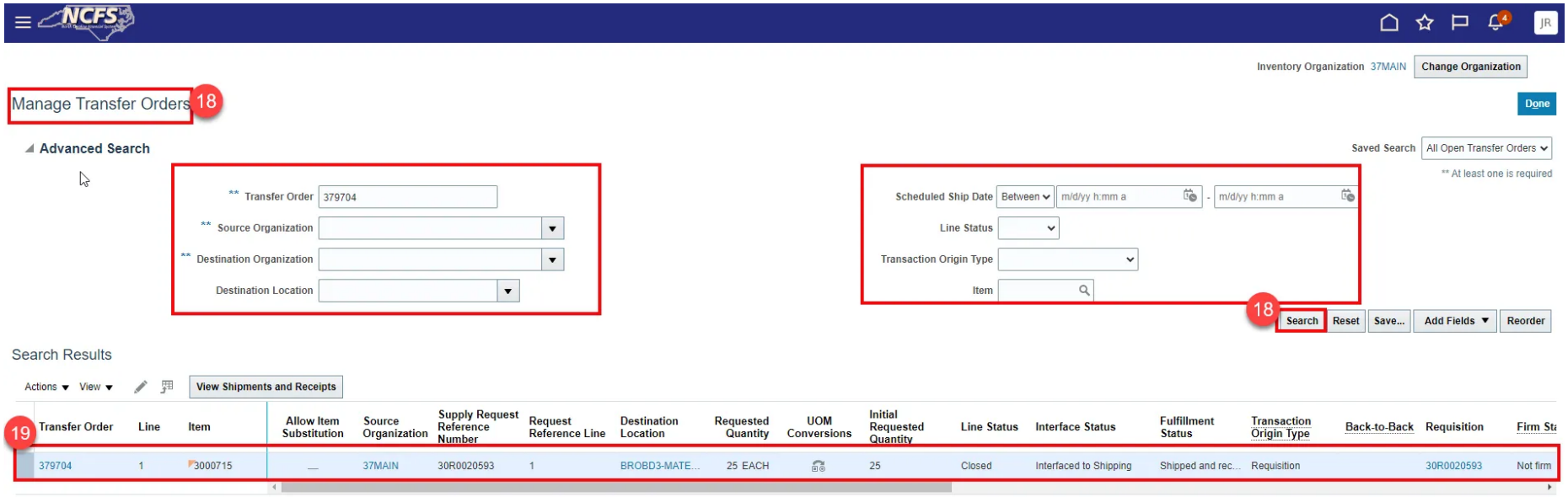


Step 18. On the **Manage Transfer Order** screen, enter **search criteria**, and then click **Search**.

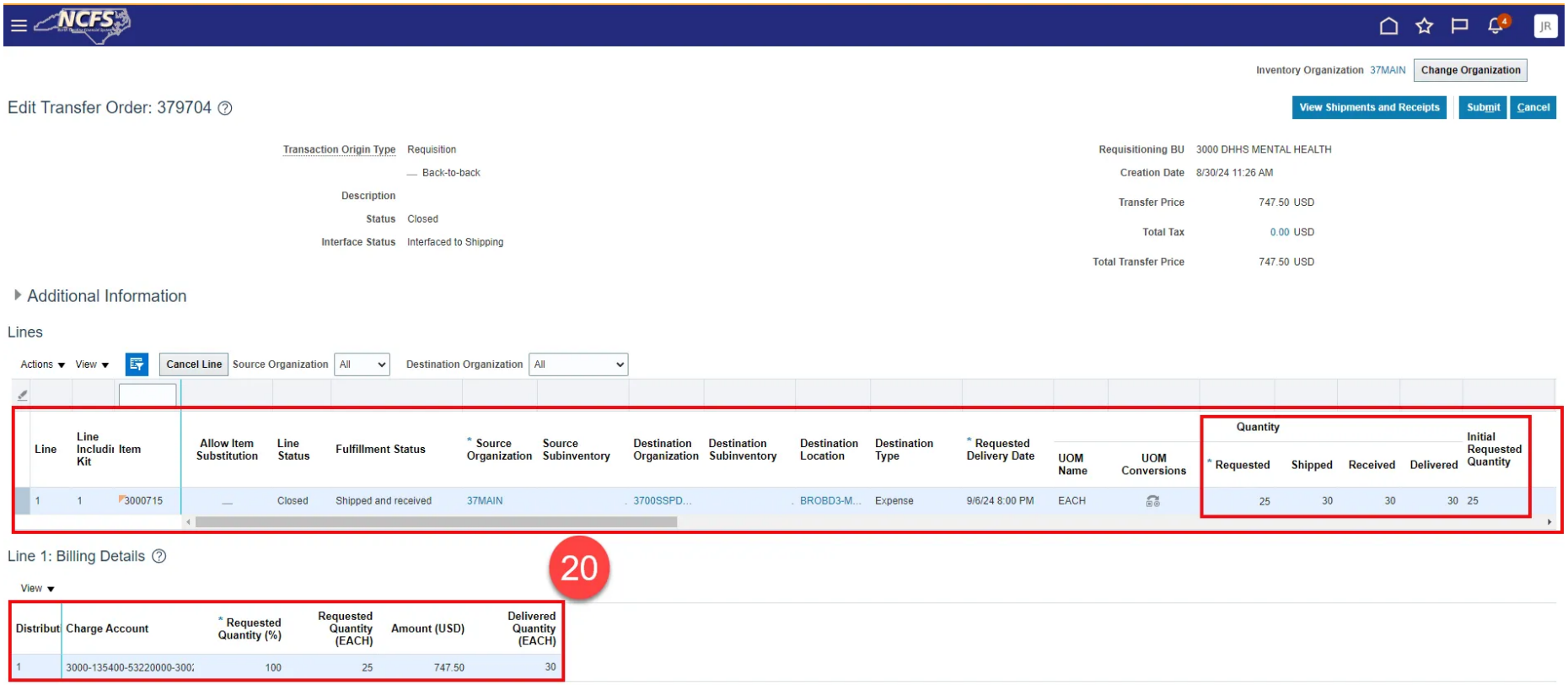
Step 19. The **Transfer Order** will populate.

Image



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

Image



Step 21. Click **Cancel** to return to **Manage Transfer Orders** screen.

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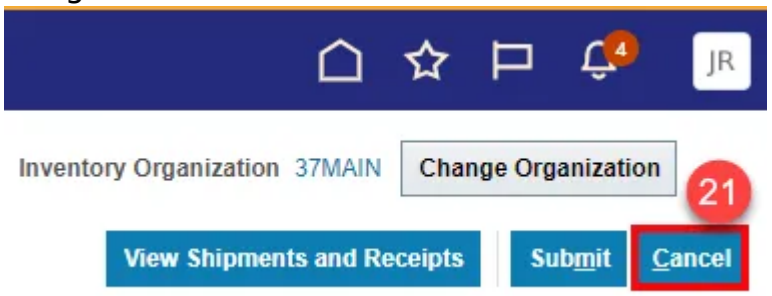

Wrap-up

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

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