INV-66 Reservations Inquiry

Purpose

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

Introduction and Overview

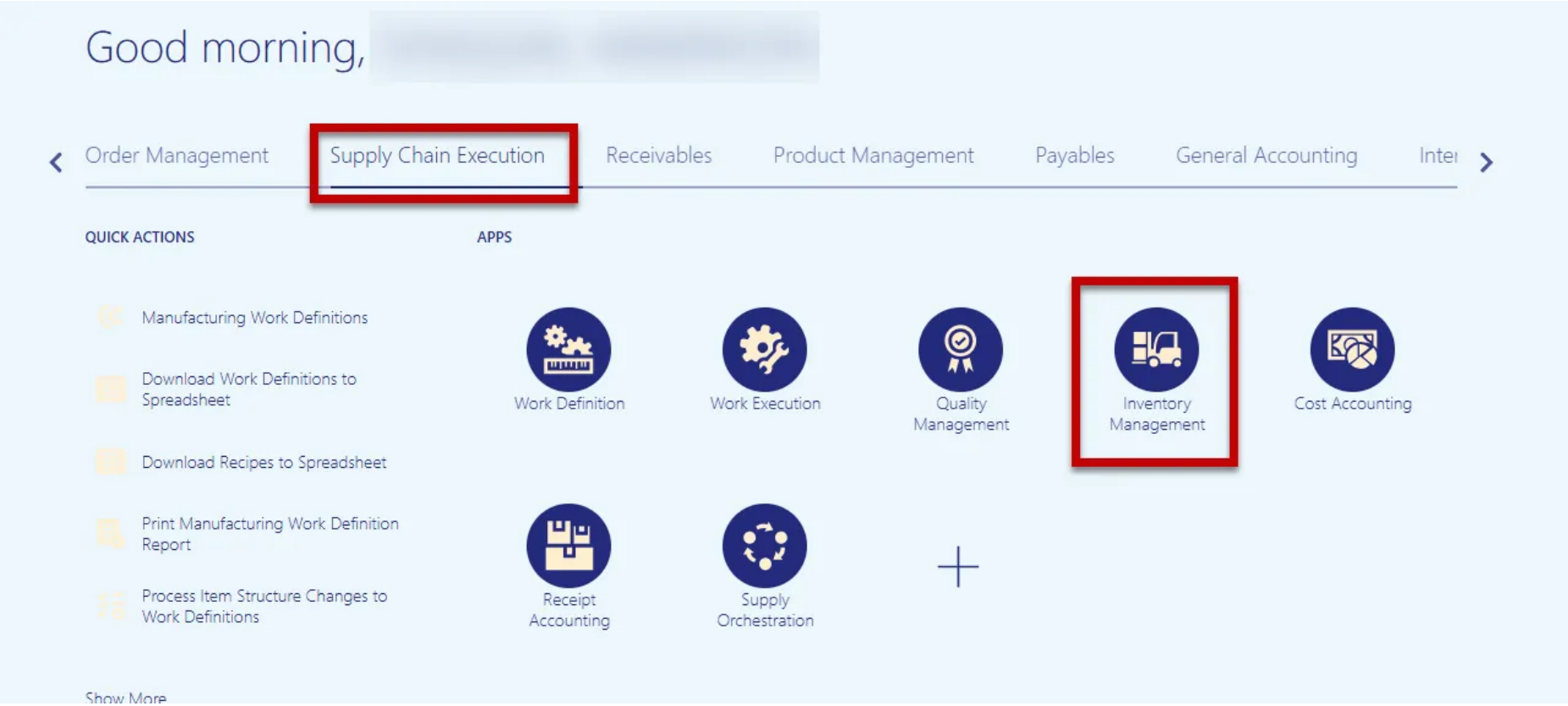
This QRG covers how to view an inventory reservation in NCFS. A reservation is a link between demand and the supply you intend to use to fulfill that demand. For example, you create a reservation to link a specific on-hand quantity of an item to a transfer order, SSP order, or sales order for a customer. This reservation ensures that the specified quantity is available on a certain date so you can fulfill this order on time. Reservations should never be created, edited, or deleted from the Reservations task, these changes should occur at the source transaction level.

Inquire on Order Reservations

To inquire about order reservations in NCFS, please follow the steps below:

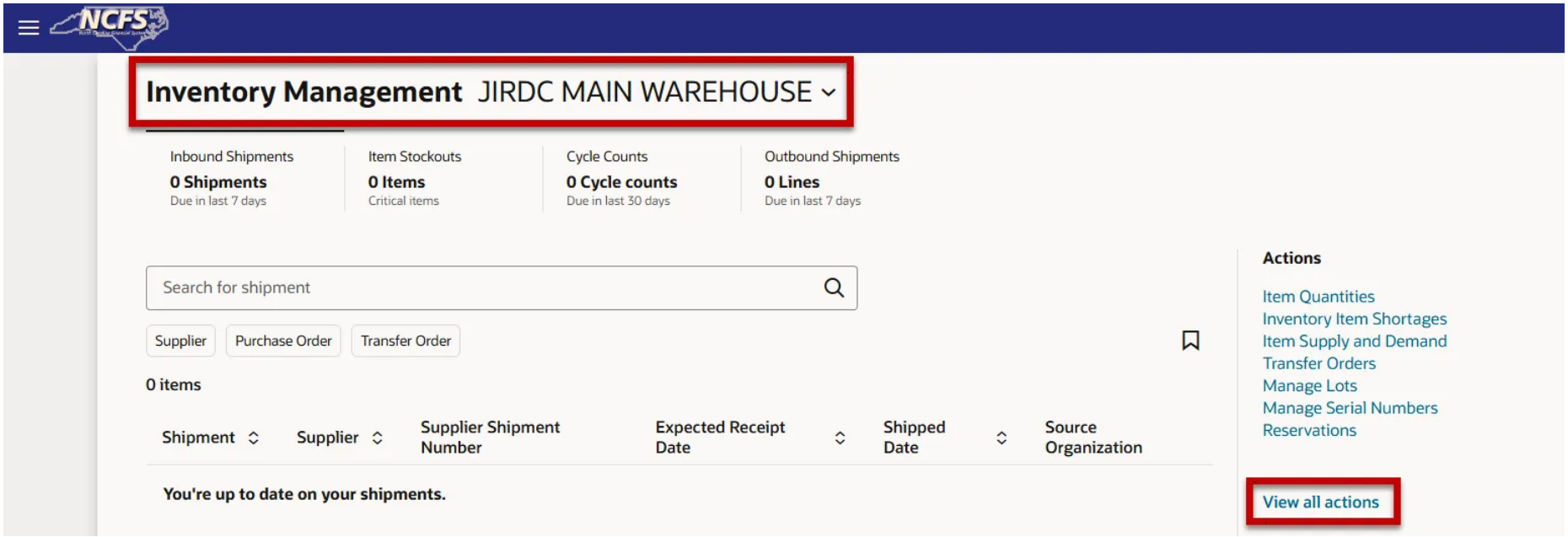
Step 1. Log in to the NCFS portal with your credentials to access the system. Navigate to **Supply Chain Execution** and select **Inventory Management**.

Image



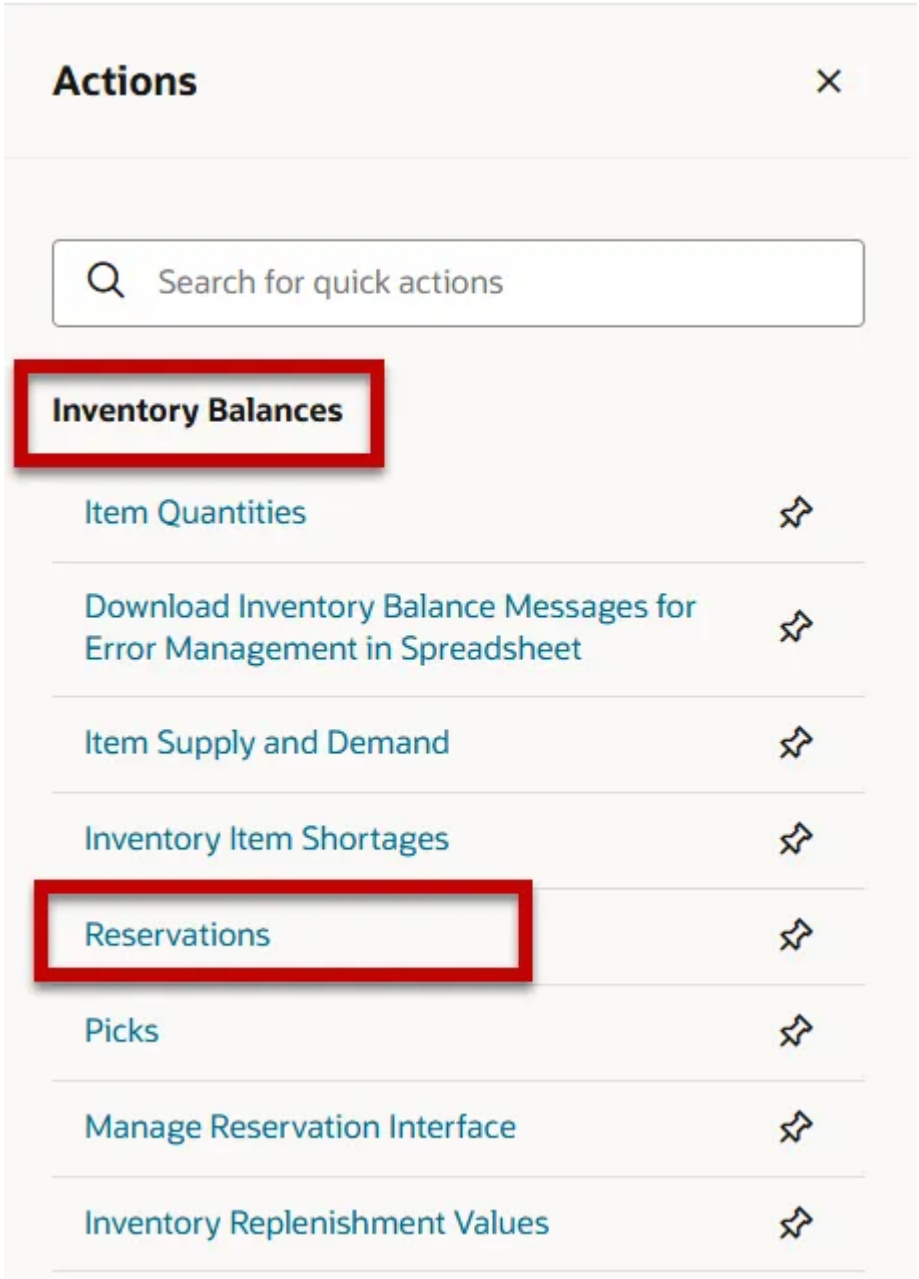
Step 2. Select the appropriate **Inventory organization** from the drop-down selection and then click the **View all actions** hyperlink.

Image



Step 3. The **Actions** window will appear. Under **Inventory Balances**, select the **Reservations** task.

Image

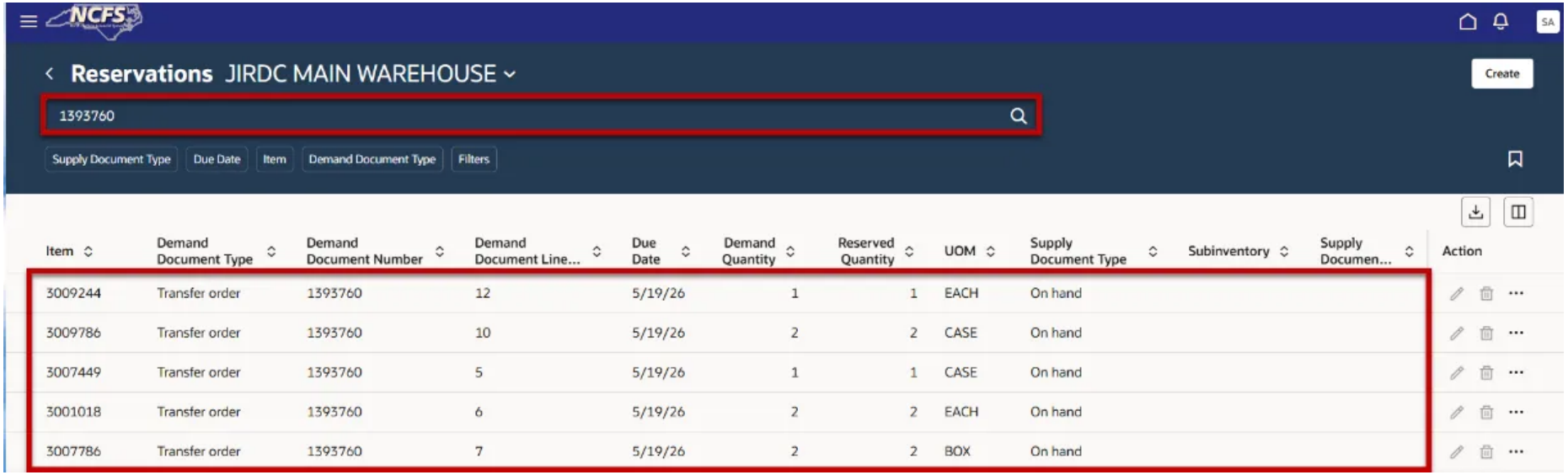

Actions
Search for quick actions
Inventory Balances
Item Quantities
Download Inventory Balance Messages for Error Management in Spreadsheet
Item Supply and Demand
Inventory Item Shortages
Reservations
Picks
Manage Reservation Interface
Inventory Replenishment Values

Step 4. On the **Reservations** screen, the search bar can be used to search for a specific item or demand document number, i.e. transfer order number.

Image



Image



Step 5. There are several filters that can assist when searching/inquiring for an order reservation.

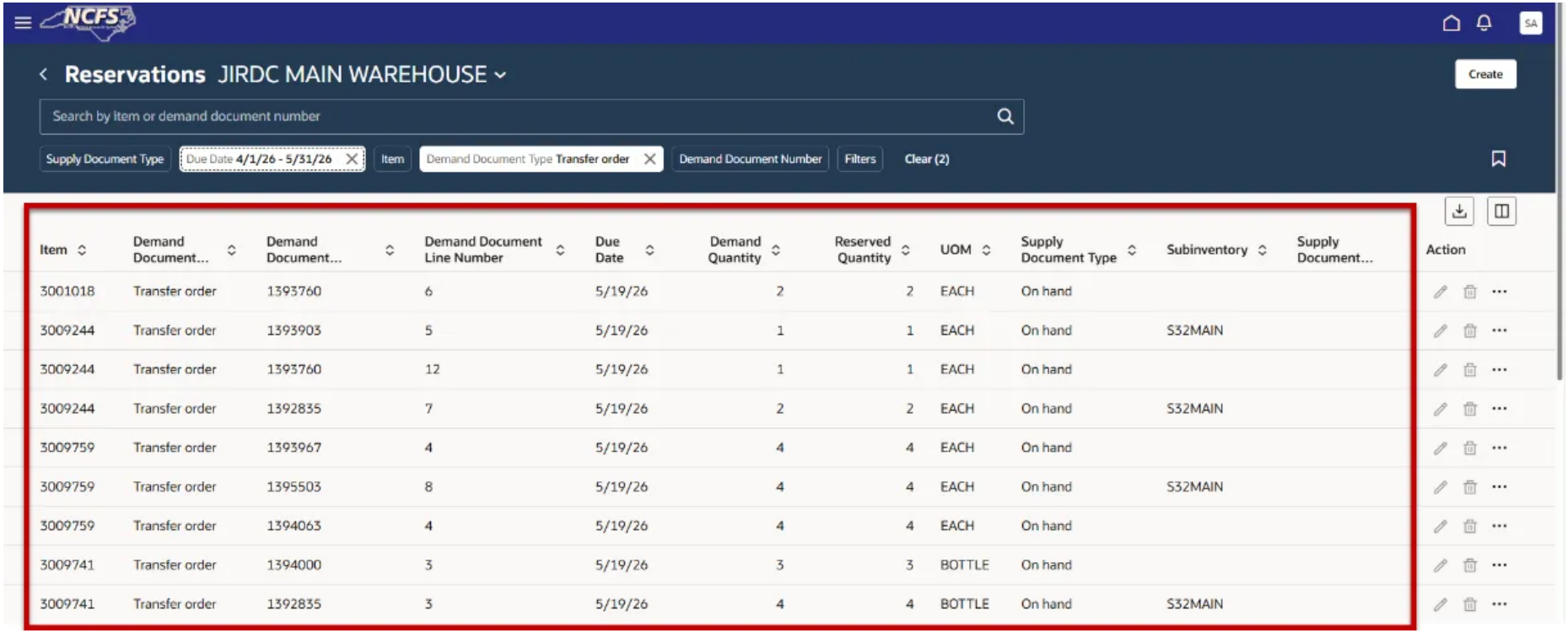
1. **Supply Document Type**: Purchase Order, On hand, Requisition, Transfer order return, Work order, and Transfer order.
2. **Due Date**: Enter date range for when the reservation is due.
3. **Item**: Inventory Item number
4. **Demand Document Type**: Purchase Order, Transfer order return, Sales order, Work order, Transfer order.

Image



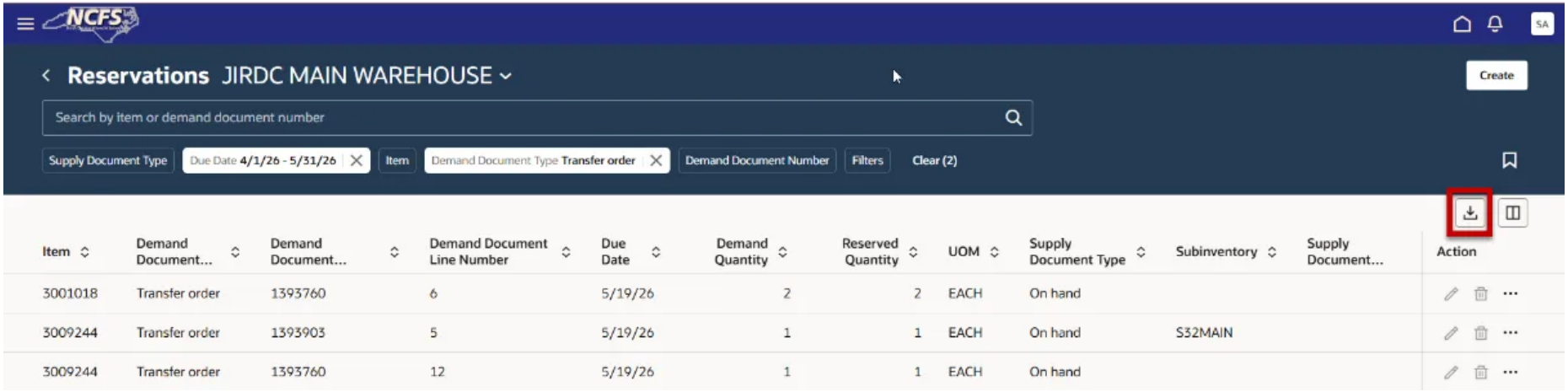
Step 6. After selecting the appropriate filters, the inventory Reservation information will display.

Image



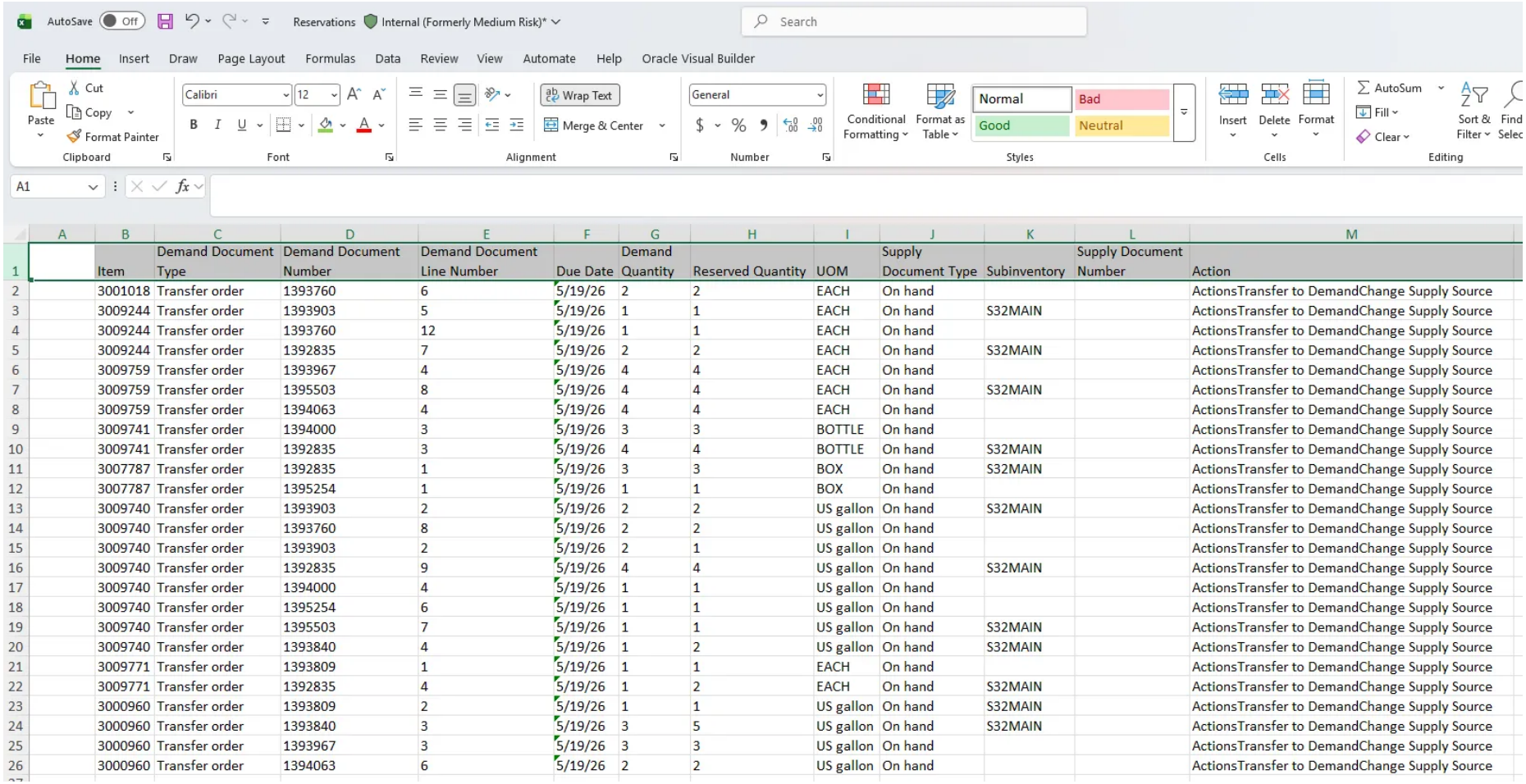
Step 7. The inventory Reservation information displayed can be downloaded into an Excel spreadsheet by clicking the **Export** button.

Image



Step 8. Click the download file “**Reservations**” to open.

Image



	A	B	C	D	E	F	G	H	I	J	K	L	M
1		Item	Demand Document Type	Demand Document Number	Demand Document Line Number	Due Date	Demand Quantity	Reserved Quantity	UOM	Supply Document Type	Subinventory	Supply Document Number	Action
2		3001018	Transfer order	1393760	6	5/19/26	2	2	EACH	On hand			ActionsTransfer to DemandChange Supply Source
3		3009244	Transfer order	1393903	5	5/19/26	1	1	EACH	On hand	S32MAIN		ActionsTransfer to DemandChange Supply Source
4		3009244	Transfer order	1393760	12	5/19/26	1	1	EACH	On hand			ActionsTransfer to DemandChange Supply Source
5		3009244	Transfer order	1392835	7	5/19/26	2	2	EACH	On hand	S32MAIN		ActionsTransfer to DemandChange Supply Source
6		3009759	Transfer order	1393967	4	5/19/26	4	4	EACH	On hand			ActionsTransfer to DemandChange Supply Source
7		3009759	Transfer order	1395503	8	5/19/26	4	4	EACH	On hand	S32MAIN		ActionsTransfer to DemandChange Supply Source
8		3009759	Transfer order	1394063	4	5/19/26	4	4	EACH	On hand			ActionsTransfer to DemandChange Supply Source
9		3009741	Transfer order	1394000	3	5/19/26	3	3	BOTTLE	On hand			ActionsTransfer to DemandChange Supply Source
10		3009741	Transfer order	1392835	3	5/19/26	4	4	BOTTLE	On hand	S32MAIN		ActionsTransfer to DemandChange Supply Source
11		3007787	Transfer order	1392835	1	5/19/26	3	3	BOX	On hand	S32MAIN		ActionsTransfer to DemandChange Supply Source
12		3007787	Transfer order	1395254	1	5/19/26	1	1	BOX	On hand			ActionsTransfer to DemandChange Supply Source
13		3009740	Transfer order	1393903	2	5/19/26	2	2	US gallon	On hand	S32MAIN		ActionsTransfer to DemandChange Supply Source
14		3009740	Transfer order	1393760	8	5/19/26	2	2	US gallon	On hand			ActionsTransfer to DemandChange Supply Source
15		3009740	Transfer order	1393903	2	5/19/26	2	1	US gallon	On hand			ActionsTransfer to DemandChange Supply Source
16		3009740	Transfer order	1392835	9	5/19/26	4	4	US gallon	On hand	S32MAIN		ActionsTransfer to DemandChange Supply Source
17		3009740	Transfer order	1394000	4	5/19/26	1	1	US gallon	On hand			ActionsTransfer to DemandChange Supply Source
18		3009740	Transfer order	1395254	6	5/19/26	1	1	US gallon	On hand			ActionsTransfer to DemandChange Supply Source
19		3009740	Transfer order	1395503	7	5/19/26	1	1	US gallon	On hand	S32MAIN		ActionsTransfer to DemandChange Supply Source
20		3009740	Transfer order	1393840	4	5/19/26	1	2	US gallon	On hand	S32MAIN		ActionsTransfer to DemandChange Supply Source
21		3009771	Transfer order	1393809	1	5/19/26	1	1	EACH	On hand			ActionsTransfer to DemandChange Supply Source
22		3009771	Transfer order	1392835	4	5/19/26	1	2	EACH	On hand	S32MAIN		ActionsTransfer to DemandChange Supply Source
23		3000960	Transfer order	1393809	2	5/19/26	1	1	US gallon	On hand	S32MAIN		ActionsTransfer to DemandChange Supply Source
24		3000960	Transfer order	1393840	3	5/19/26	3	5	US gallon	On hand	S32MAIN		ActionsTransfer to DemandChange Supply Source
25		3000960	Transfer order	1393967	3	5/19/26	3	3	US gallon	On hand			ActionsTransfer to DemandChange Supply Source
26		3000960	Transfer order	1394063	6	5/19/26	2	2	US gallon	On hand			ActionsTransfer to DemandChange Supply Source

Wrap-Up

The purpose of this QRG is to provide a step-by-step explanation on how to Inquire on Inventory Reservations in NCFS. Reservations should never be created, deleted, or edited from the Reservations task. Any changes to a Reservation should occur at the source transaction level.

Additional Resources

Web-Based Training (WBT)

- INV001: Inventory Inquiry

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