



CREATE, INQUIRE, AND EDIT TRANSFER ORDERS FROM INVENTORY

INV

QUICK REFERENCE GUIDE INV-11

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.

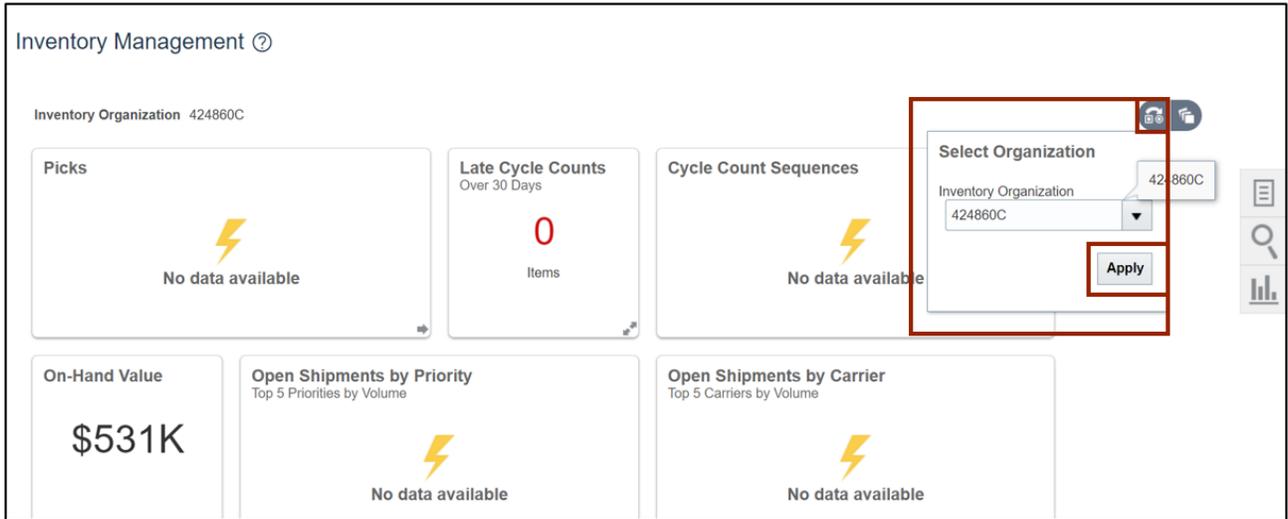
Create and Inquire on Orders from Inventory

To create and inquire on orders from inventory in NCFS, please follow the steps below:

1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, under the **Supply Execution** tab, click the **Inventory Management** app.

The screenshot shows the NCFS Home page interface. At the top, there are navigation tabs: 'Contract Management', 'Supply Chain Execution' (highlighted with a red box), 'Receivables', and 'Supply Chain Planning'. Below the tabs, the page is divided into 'QUICK ACTIONS' and 'APPS'. Under 'QUICK ACTIONS', there are several items: 'Manufacturing Work Definitions', 'Manage Inspections', 'Manage Quality Issues', 'Manage Quality Actions', 'Manage Problem Reports', and 'Manage Corrective Actions'. Under 'APPS', there are six icons: 'Work Definition', 'Quality Management', 'Inventory Management' (highlighted with a red box), 'Cost Accounting', 'Receipt Accounting', and 'Fiscal Document Capture'.

- 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.



Inventory Management ?

Inventory Organization 424860C

Picks
No data available

Late Cycle Counts
Over 30 Days
0
Items

Cycle Count Sequences
No data available

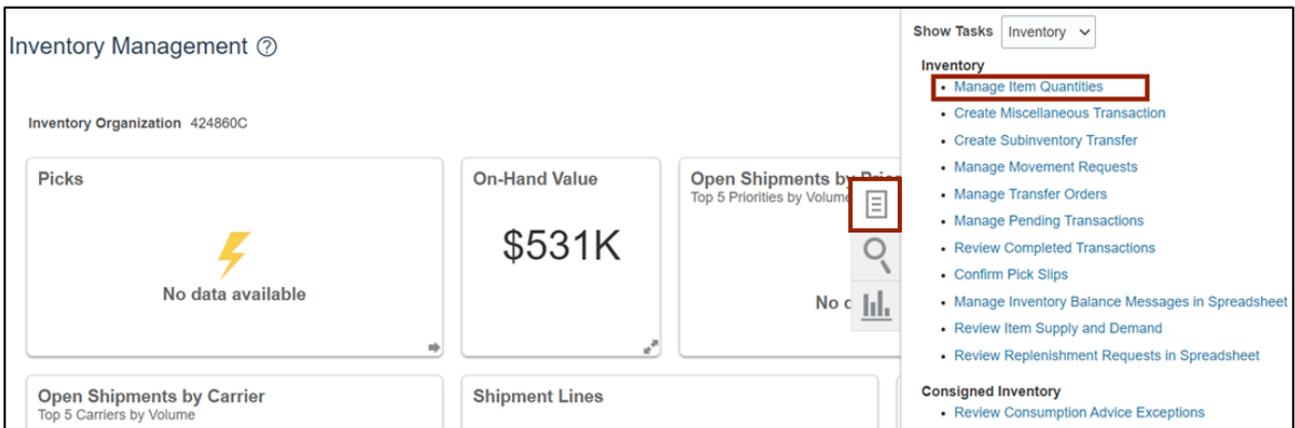
On-Hand Value
\$531K

Open Shipments by Priority
Top 5 Priorities by Volume
No data available

Open Shipments by Carrier
Top 5 Carriers by Volume
No data available

Select Organization
Inventory Organization
424860C
Apply

- Click on the **Tasks** [] icon. Under the **Inventory** section, click **Manage Item Quantities**.



Inventory Management ?

Inventory Organization 424860C

Picks
No data available

On-Hand Value
\$531K

Open Shipments by Priority
Top 5 Priorities by Volume
No data available

Open Shipments by Carrier
Top 5 Carriers by Volume

Shipment Lines

Show Tasks Inventory

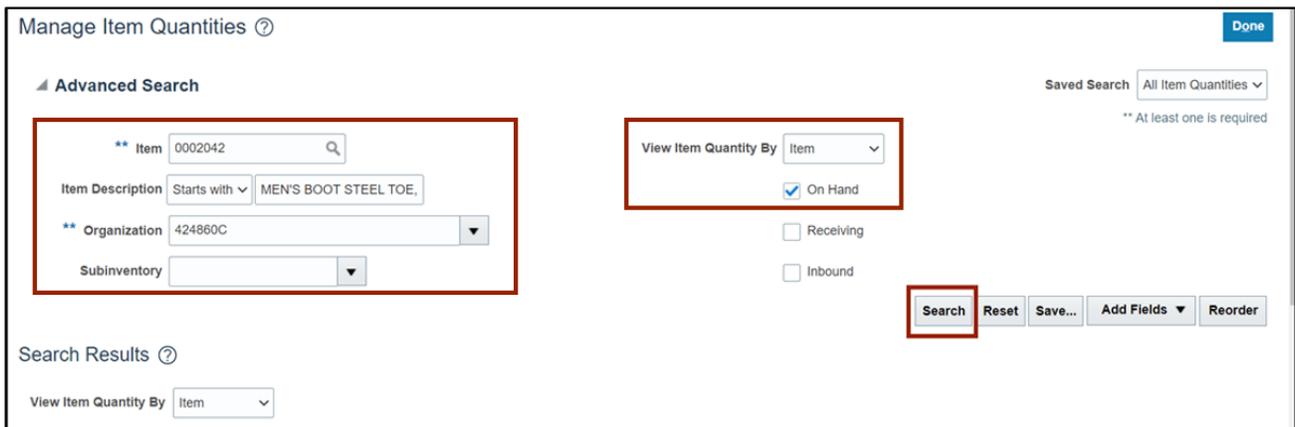
Inventory

- Manage Item Quantities
- Create Miscellaneous Transaction
- Create Subinventory Transfer
- Manage Movement Requests
- Manage Transfer Orders
- Manage Pending Transactions
- Review Completed Transactions
- Confirm Pick Slips
- Manage Inventory Balance Messages in Spreadsheet
- Review Item Supply and Demand
- Review Replenishment Requests in Spreadsheet

Consigned Inventory

- Review Consumption Advice Exceptions

- 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.



Manage Item Quantities ?

Advanced Search

Item 0002042

Item Description Starts with MEN'S BOOT STEEL TOE

Organization 424860C

Subinventory

View Item Quantity By Item

On Hand

Receiving

Inbound

Search Reset Save... Add Fields Reorder

Search Results ?

View Item Quantity By Item

Saved Search All Item Quantities

** At least one is required

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

The screenshot shows the SAP Inventory Organization interface. At the top right, it displays 'Inventory Organization 424860C' and a 'Change Organization' button. A 'Saved Search' dropdown is set to 'All Item Quantities'. A 'Done' button is visible in the top right corner. On the left, a navigation menu is open, and the 'Request Transfer Order' option is highlighted with a red box. Below the menu, the 'Actions' dropdown is also highlighted with a red box. The main table shows the following data:

Item	Quantity			UOM Name
	On Hand	Receiving	Inbound	
Item 0002042	3			PAIR

Below the table, the 'Item 0002042: Details' section is visible, showing 'Item 0002042' and 'Category Name 461816-Safety footwear'.

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

The screenshot shows the 'Create Supply Request' form in SAP. At the top right, it displays 'Inventory Organization 424860C' and a 'Change Organization' button. The form title is 'Create Supply Request'. Below the title, there are 'Submit' and 'Cancel' buttons. The 'Destination Organization' is 'SCOTLAND - CLOTHING WAREHOUSE' and the 'Supply Request Reference Number' is 'INV_57001'. A 'Select Supply Source' button is highlighted with a red box. Below this, a table shows the following data:

* Item	* Requested Quantity	* UOM	* Supply Source	* Requested Delivery Date	* Supply Details	Status
0002042	<input type="text" value="1"/>	PAIR		4/19/23 4:01		

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

Inventory Organization 424860C Change Organization

Select Supply Source ?

Requested Item 0002042 Requested Delivery Date 4/19/23 Destination Organization SCOTLAND - CLOTHING WAREHOUSE

Requested Quantity 1 UOM PAIR

View ▾

Ranking	Supply Type	Supply Source	Total Available Quantity	UOM
0	Transfer	CENTRAL SUPPLY WAREH	78	PAIR

OK Cancel

12. Click the **Submit** button.

Inventory Organization 424860C Change Organization

Create Supply Request ?

Destination Organization SCOTLAND - CLOTHING WAREHOUSE Supply Request Reference Number INV_57001

View ▾ + X Select Supply Source

* Item	* Requested Quantity	* UOM	* Supply Source	* Requested Delivery Date	* Supply Details	Status
0002042	1	PAIR	CENTRAL SUPPLY WAREH	4/19/23 4:01		

Submit Cancel

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

Inventory Organization 424860C Change Organization

Create Supply Request ?

Destination Organization SCOTLAND - CLOTHING WAREHOUSE Supply Request Reference Number INV_57001

View ▾ + X Select Supply Source

* Item	* Requested Quantity	* UOM	* Supply Source	* Requested Delivery Date	* Supply Details	Status
0002042	1	PAIR	CENTRAL SUPPLY WAREH	4/19/23 4:01		

Supply Details

Confirmation

Supply request was created and submitted for processing. The supply request reference number is: INV_57001.

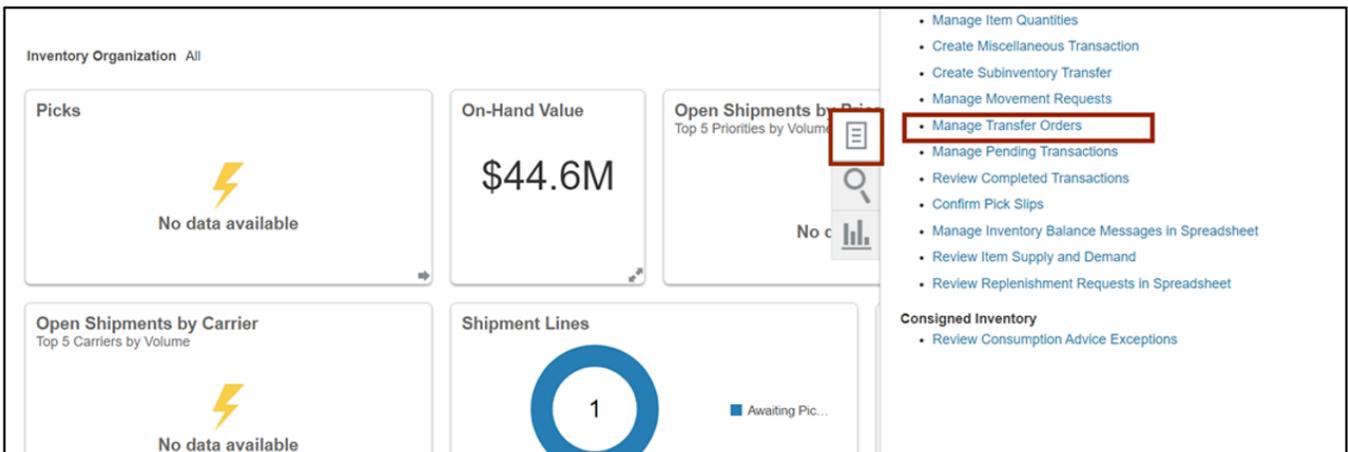
OK

Submit Cancel

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



15. Click the **Tasks** [] icon. Under the **Inventory** section, click **Manage Transfer Orders**.



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

Inventory Organization All [Change Organization](#)

Manage Transfer Orders [?](#) [Done](#)

Advanced Search Saved Search All Open Transfer Orders [v](#)

**** Transfer Order**

**** Source Organization** 424860 [v](#)

**** Destination Organization** [v](#)

Destination Location [v](#)

Scheduled Ship Date Between -

Line Status Open [v](#)

Transaction Origin Type [v](#)

Item

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

Search Results

Actions [v](#) View [v](#) [View Shipments and Receipts](#)

Transfer Order	Line	Item	Source Organization	Destination Location	Requested Quantity	Line Status	Interface Status	Fulfillment Status	Transaction Origin Type	Requested Delivery Date
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17. Click the **Transfer Order** link.

Inventory Organization All [Change Organization](#)

Manage Transfer Orders [?](#) [Done](#)

Advanced Search Saved Search All Open Transfer Orders [v](#)

Search Results

Actions [v](#) View [v](#) [View Shipments and Receipts](#)

Transfer Order	Line	Item	Source Organization	Destination Location	Requested Quantity	Line Status	Interface Status	Fulfillment Status	Transaction Origin Type	Requested Delivery Date
17002	1	0009273	428305R	423010F-1034 ...	2 Pounds	Closed	Interfaced to Shipping	Shipped and rec...	Inventory	1/13/23 12:53 AM

18. 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.

Inventory Organization All [Change Organization](#)

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

Edit Transfer Order: 49002 ?

Transaction Origin Type Inventory
 — Back-to-back

Description
 Status Open
 Interface Status Interfaced to Shipping

Requisitioning BU 1900 DEPARTMENT OF PUBLIC SAFETY
 Creation Date 4/18/23 4:37 PM
 Transfer Price 9.20 USD
 Total Tax 0.00 USD
 Total Transfer Price 9.20 USD

▶ Additional Information

Lines

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

Line	Item	Line Status	Fulfillment Status	* Source Organization	Destination Location	* Requested Delivery Date	UOM Name	Quantity				Requisition	Comment
								* Requested	Shipped	Received	Delivered		
1	P0002042	Open	Awaiting fulfillment	421045	424860C-22...	4/19/23 4:01	PAIR	1					

Wrap-Up

Create and Inquire on Orders from Inventory using the steps above.

Additional Resources

Web-Based Training (WBT)

- INV001: Inventory Inquiry