

APPROVE OR REJECT

INVOICES

AP

QUICK REFERENCE GUIDE AP-28

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Approve or Reject Invoices in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the steps to Approve or Reject Invoices in NCFS.

Approve Invoices

To Approve Invoices 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, click the **Notifications** [🧖] icon and select the required notification.





3. The *Approval* pop-up window appears. Click the **Approve** button.

Approval of Invoice 1300_INV_Request	ter from FORMSTACK	LLC (100.00 USD)	View Invoid	Actions 🔻	Approve	Reject
Invoice Ap 100.00 FORMS 1300_INV_F 5/15/23	Doproval DUSD STACK LLC Requester					
Details						
	From	Erik Frasca				
	Requester	Justin Battle				
	Supplier Site	R.13PT.A				
	Business Unit	1300 DEPARTMENT OF ADMINISTRATION				
Amount Su	mmary					
Line Type			Amount			
Item			100.00			
Total			100.00			

4. The *Approve* pop-up appears. Enter a **Comment** if required and click the **Submit** button. The Invoice is Approved.

Note: Comments for approving an invoice is optional.

A	Approve	Submit	Cancel
	Comment	approved	
		Drag files here or click to add attachment v	

5. Users can also navigate to **Home** page > **Payables** tab > **Payables Dashboard** to view the list of Invoices requiring attention and Approve or Reject from here.

in the second						
ultring My Approval (2) Pending Approval from Others (0) Rejected (23)	Invoices on Hold (6	65) Installments o	n Hold (0)			
View 🔻 🎢 🕥 Approve Reject 🧷 📑 🔂 Detach						
Title	Invoice Number	Due Date	Amount Requester	Supplier	Business Unit	Description
Approval of Invoice 1300_INV_REJECT from FORMS & SUPPLY INC (1	1300_INV_REJE	5/15/23	100.00 USD ^F Justin Battle	FORMS & SUPPLY INC	1300 DEPARTMENT OF	
Approval of Invoice 1300_INV_ReqMoreInfo from FORMS & SUPPLY IN	1300_INV_Req	6/14/23	100.00 USD ⁷ Justin Battle	FORMS & SUPPLY INC	1300 DEPARTMENT OF	
equiring Attention (1) Recently Completed (5) Recently Terminated (1)						
View 🔻 🎵 💭 Detach 🕥						
view ▼ 第 🔛 Detach 🕑 Name						

Reject Invoices

To Reject Invoices 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, click the **Notifications** [49] icon and click on the required notification.



3. The *Approval* pop-up appears. Click the **Reject** button.

Approval of Invoice 1300_INV_Requester from FORMSTACK	LLC (100.00 USD)	View Invoice Actions Actions
Invoice Approval 100.00 USD FORMSTACK LLC 1300_INV_Requester 5/15/23		
Details		
From	Erik Frasca	
Requester	Justin Battle	
Supplier Site	R.13PT.A	
Business Unit	1300 DEPARTMENT OF ADMINISTRATION	
Amount Summary		
Line Type	An	ount
Item	1	00.00
Total	1	00.00

4. The *Reject* pop-up appears. Enter a **Comment** as required and click the **Submit** button. The Invoice is Rejected.

Note: The Comment is optional but it is encouraged to add the reasons for rejection.

F	Reject	Submit	Cancel
	Comment	Invoice Header details incorrect	
		Drag files here or click to add attachment v	
		·	

Request Additional Information

An approver can send an invoice back to the requestor if adequate details are not mentioned in it. Complete the following steps to request for additional information:

1. On the **NCFS Home** page, click the **Notifications** [⁴³] **icon**. Select the required notification.

		TS
Welcome, Training Super User 1 ②	Pending Notifications More Petalls Enter search terms	88
You have a new Open it with the	Action Required: Approval of Invoice 9 seconds ago 1300_INV_ReqMoreInfo from FORMS & SUPPLY INC (100.00 USD) Erik Frasca Approve Reject	
home page! You can contin Dashboard ite	Action Required: Approval of Invoice 1 minute ago 1300_INV_REASSIGN from FORMS & SUPPLY INC (100.00 USD) Erik Frasca Approve Reject	
	Action Required: Approval of Invoice 2 minutes ago 1300_INV_REJECT from FORMS & SUPPLY INC (100.00 USD)	

2. The *Approval* pop-up window appears. Click the *Actions* drop-down choice list button, select **Request Information.**

Approval of Invoice 1300_INV_ReqMoreInfo from FORMS &	SUPPLY INC (100.00 USD) View Invol	ice Actions v Approve Reject
Invoice Approval 100.00 USD FORMS & SUPPLY INC 1300_INV_ReqMoreInfo 5/15/23		Edit Distributions Rèquest Information Delegate Reassign Route Task Escalate Suspend
Details		Withdraw
From	Erik Frasca	Skip Current Assignment
Requester	Justin Battle	Add Comments
Supplier Site	R.13PT.A	Add Attachment
Business Unit	1300 DEPARTMENT OF ADMINISTRATION	View Approvals
Amount Summary		
Line Type	Amount	
Item	100.00	

3. The *Request Information* pop-up window appears. Enter the **Name** of the user from whom additional information is required. Enter a **Comment** mentioning the required information.

Request Info	ormation	Submit	Cancel
* Name			
* Comment			
			4
Return Options	Back to me		
	Follow approval flow		

4. Select the required **Return Options** radio button. Click the **Submit** button.

Request Info	ormation	Submit	Cancel
* Name			
* Comment			là
Return Options	 Back to me Follow approval flow 		

Wrap-Up

Approve or Reject Invoices using the steps above. The Invoice Approver must approve or reject an invoice sent to a requestor/employee supervisor for approval in the event of invoice not getting auto approved.

Additional Resources

Virtual Instructor-Led Training (vILT)

• AP101: Invoice Management