

**APPROVE CUSTOMER** 

# ORDERS

INV

## **QUICK REFERENCE GUIDE INV-31**

#### Purpose

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

#### Introduction and Overview

Consumption requisition can be described as:

Request of goods or items from an internal predefined source organization and Customer Orders or Usage Orders. This QRG covers the steps to approve customer orders in NCFS.

#### Approve Customer Orders

To Approve Customer Orders in NCFS, please follow the steps below:

- 1. Log in to the NCFS portal with your credentials to access the system.
- 2. On the **landing** page, click the **Notifications** [ 4 ] icon.

Welcome, TEST INV Req Approval 1900 ⑦			
	You have a new home page!	Open it with the home icon or the company logo. You can continue to access this page by selecting the My Dashboard item in the navigation menu.	



3. The *Pending Notifications* pop-up appears. On this pop-up, click the **Approve Requisition** notification.

In this example, we choose the <u>Action Required: Approve Requisition 19R0000141</u> notification link.

Welcome, TEST INV Req Approval 1900 ③	Pending Notifications  More Details
	Enter search terms 23
You have a new Open it with the home icon or the com	Action Required: Approve Requisition 2 hours ago  19R0000141 TEST INV Requestor Approve Reject
home page! You can continue to access this page to Dashboard item in the navigation men	19R0000140
	TEST INV Requestor Approve Reject Action Required: Approve Requisition 2 hours ago
	19R0000137 TEST INV Requestor Approve Reject

4. The **Approve Requisition** page opens with all the requisition details to review for errors/accuracy. On the **Approve Requisition** page, click the **Approve** button.

Approve Requisition 19R0000141		Actions
	Requisition Approval \$34.80	
	INV Requestor, TEST BEEF ROAST, TOP ROUND (INSIDE) TEST OPEN ORDER REPORT AND QTY BACK Funds check warning	
	Requisition <u>19R0000141</u> Lines	
	BEEF ROAST, TOP ROUND (INSIDE) TEST OPEN         \$34.80           ORDER REPORT AND GTY BACKORDER         REPORTFORMORETHAN80           10 x 53.48         Item: 0003646           Charge Account: 1900-102830-53220000-1903930-0000000-00000-00000-00000-00000-00000-0000	
	Approval History	
	Assigned to TEST INV Req Approval 1900	
	10/18/22 12.27 AM	

5. The *Approve* pop-up appears. On the *Approve* pop-up, enter the reasons on the *Comment* field to approve a customer order.

Approve Requisition 19R0000141			Actions V Approve Reject
	Requisition Approval \$34.80 INV Requestor, TEST		
	Approve	Submit Cancel	
	Comment	1	
	Drag files here or click to add attachment 🐱		
	Approver movery		

6. Click the **Submit** button. You are now redirected to the landing page.

Approve Requisition 19R0000141				Actions V Approve Reject
	Requisition Approval \$34.80 INV Requestor, TEST			
	Approve Submit Cancel			
≡ CNCFS			Notification	
Welcome, TEST INV Req Approval 1900 ⑦			Pending Notifications   Enter search terms	More Details
Â	You have a new home page!	Open it with the home icon or the com You can continue to access this page to Dashboard item in the navigation men	Action Required: Approve Requisition 1980000141 TEST INV Requestor	2 hours ago Approve Reject
			Action Required: Approve Requisition 19R0000137 TEST INV Requestor	2 hours ago Approve Reject

# Wrap-Up

Approve customer orders using the steps above.

### Additional Resources

#### Web-Based Training (WBT)

• INV107: Consumption Requisition Approvals