

## AP-28 Approve or Reject Invoices

### **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. There are 5 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 **Notifications** icon and select the required notification.

Image

NCFS

Welcome, Training Super User 1 ?

You have a new home page!

Pending Notifications

Enter search terms

- Action Required: Approval of Invoice 1300\_INV\_ReqMoreInfo from FORMS & SUPPLY INC (100.00 USD) 9 seconds ago
- Action Required: Approval of Invoice 1300\_INV\_REASSIGN from FORMS & SUPPLY INC (100.00 USD) 1 minute ago
- Action Required: Approval of Invoice 1300\_INV\_REJECT from FORMS & SUPPLY INC (100.00 USD) 2 minutes ago

Erik Frasca Approve Reject

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

Image

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    | Amount        |
|--------------|---------------|
| Item         | 100.00        |
| <b>Total</b> | <b>100.00</b> |

Step 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.

Image

# Approve

Submit

Cancel

Comment

approved

I



Drag files here or click to add attachment



Step 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.

Image

Payables Dashboard

Invoices Requiring Attention

Requiring My Approval (2)

Pending Approval from Others (0)

Rejected (23)

Invoices on Hold (65)

Installments on 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 | 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 | Justin Battle | FORMS & SUPPLY INC | 1300 DEPARTMENT OF ... |             |

Payment Process Requests

Requiring Attention (1)

Recently Completed (5)

Recently Terminated (1)

View

Detach

Name

Test RPT-CM-045

# Reject Invoices

To Reject Invoices in NCFS, please follow the steps below. There are 4 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 **Notifications** icon and click on the required notification.

Image

Welcome, Training Super User 1 ?



You have a new home page!

Pending Notifications

Enter search terms

- Action Required: Approval of Invoice  
1300\_INV\_ReqMoreInfo from FORMS & SUPPLY INC  
(100.00 USD)  
9 seconds ago  
Erik Frasca Approve Reject
- Action Required: Approval of Invoice  
1300\_INV\_REASSIGN from FORMS & SUPPLY INC  
(100.00 USD)  
1 minute ago  
Erik Frasca Approve Reject
- Action Required: Approval of Invoice  
1300\_INV\_REJECT from FORMS & SUPPLY INC  
(100.00 USD)  
2 minutes ago

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

Image

Approval of Invoice 1300\_INV\_Requester from FORMSTACK LLC (100.00 USD)

[View Invoice](#)

Actions ▼

[Approve](#)

[Reject](#)

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    | Amount        |
|--------------|---------------|
| Item         | 100.00        |
| <b>Total</b> | <b>100.00</b> |

Step 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.

Image

Reject

Submit

Cancel

Comment

Invoice Header details incorrect



Drag files here or click to add attachment ▼

## 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. There are 4 steps to complete this process.

Step 1. On the **NCFS Home** page, click the **Notifications** icon. Select the required notification.



Image

The screenshot shows the NCFS (North Carolina Financial System) dashboard. The top navigation bar is dark blue with the NCFS logo on the left and navigation icons (home, star, flag, notifications, and user profile) on the right. The notifications icon is highlighted with a red box and shows a badge with the number 23. Below the navigation bar, the main content area has a light blue background. On the left, there is a large blue banner with a white house icon and the text "You have a new home page!". To the right of the banner, there is a section titled "Pending Notifications" with a dropdown arrow and a "More Details" link. Below this title is a search bar with the placeholder text "Enter search terms". A list of three notifications is displayed, each with a blue circular icon, a title, a description, a timestamp, and a user name. The first notification is highlighted with a red box. It reads: "Action Required: Approval of Invoice", "1300\_INV\_ReqMoreInfo from FORMS & SUPPLY INC (100.00 USD)", "9 seconds ago", and "Erik Frasca". To the right of the notification are two buttons: "Approve" and "Reject". The second notification is identical but with a timestamp of "1 minute ago". The third notification is identical but with a timestamp of "2 minutes ago".

Welcome, Training Super User 1 ?

Pending Notifications ▾ [More Details](#)

Enter search terms

- Action Required: Approval of Invoice  
1300\_INV\_ReqMoreInfo from FORMS & SUPPLY INC  
(100.00 USD)  
9 seconds ago  
Erik Frasca [Approve](#) [Reject](#)
- Action Required: Approval of Invoice  
1300\_INV\_REASSIGN from FORMS & SUPPLY INC  
(100.00 USD)  
1 minute ago  
Erik Frasca [Approve](#) [Reject](#)
- Action Required: Approval of Invoice  
1300\_INV\_REJECT from FORMS & SUPPLY INC  
(100.00 USD)  
2 minutes ago

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

Image

Approval of Invoice 1300\_INV\_ReqMoreInfo from FORMS & SUPPLY INC (100.00 USD)

[View Invoice](#) [Actions](#) [Approve](#) [Reject](#)

Invoice Approval

**100.00 USD**

**FORMS & SUPPLY INC**

1300\_INV\_ReqMoreInfo

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 | Amount |
|-----------|--------|
| Item      | 100.00 |

Edit Distributions

**Request Information**

Delegate

Reassign

Route Task

Escalate

Suspend

Withdraw

Skip Current Assignment

Add Comments

Add Attachment

View Approvals

Step 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.

Image

## Request Information

Submit

Cancel

\* Name

\* Comment

Return Options

☒

Back to me

☐

Follow approval flow

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

Image

# Request Information

Submit

Cancel

\* Name

\* Comment

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](#)

## **First Published**

Thu, 07/27/2023

## **Last Updated**

Mon, 08/25/2025

[View PDF](#)