AR-06 Create and Manage Invoices

Purpose

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

Introduction and Overview

This QRG covers how to create and manage invoices in NCFS.

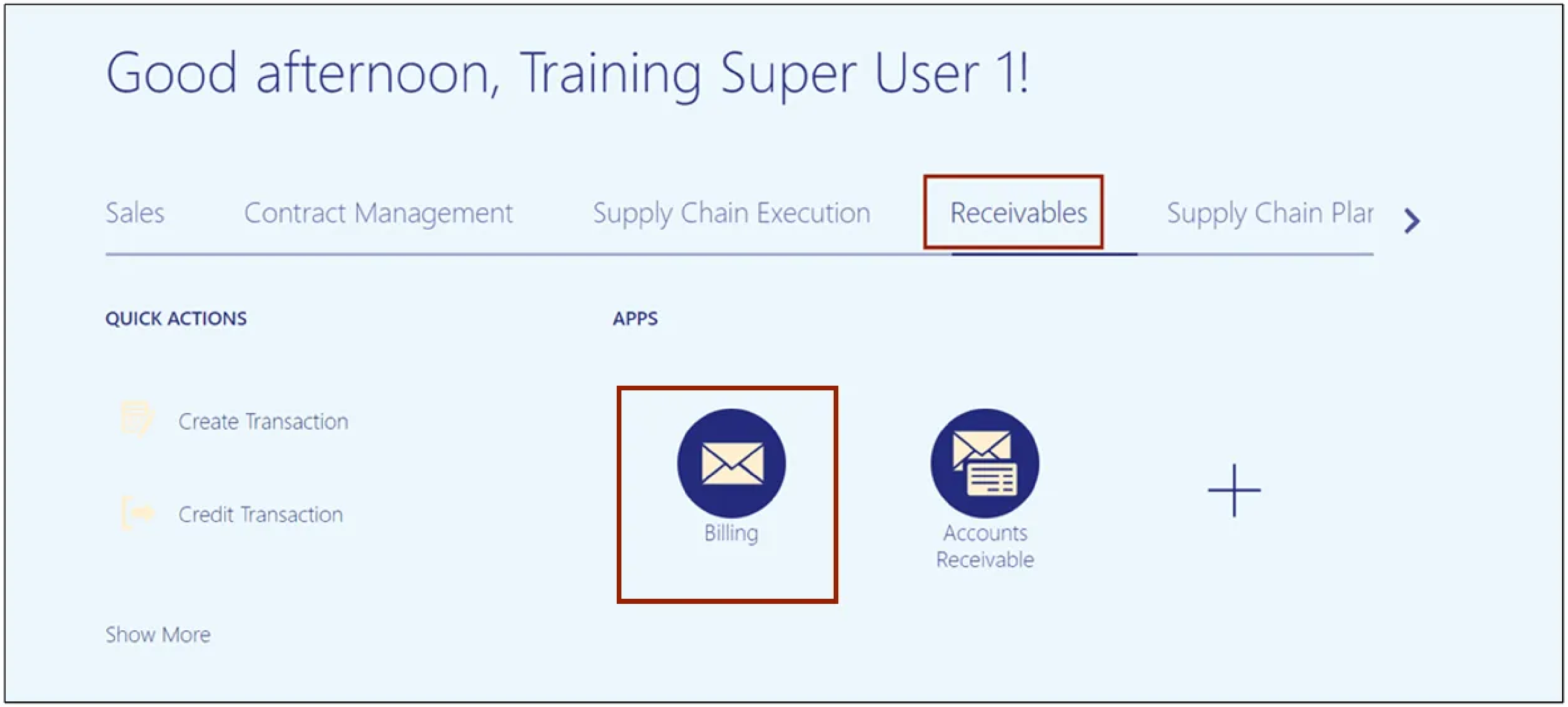
Create and Manage Invoices

To create and manage invoices in NCFS, please follow the steps below. There are 14 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

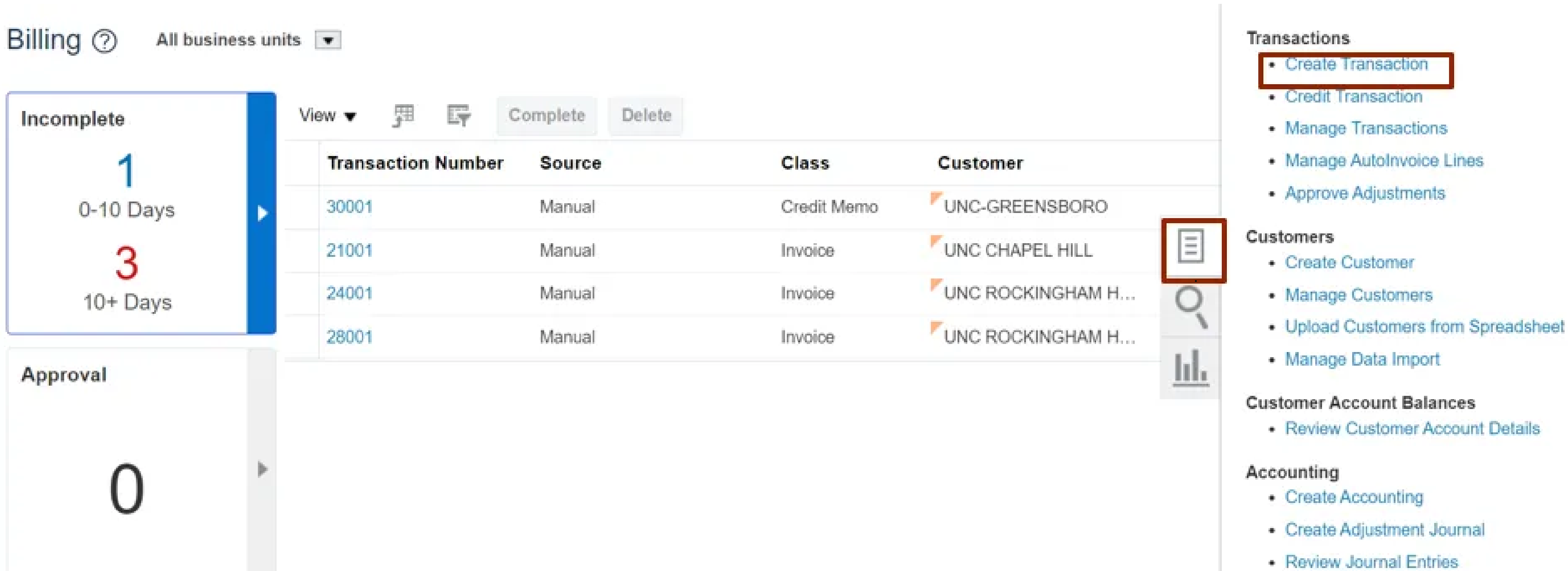
Step 2. On the **Home** page, under the **Receivables** tab, Click the **Billing** app.

Image



Step 3. On the **Billing** page, Click the **Tasks** icon and select the **Create Transaction** link.

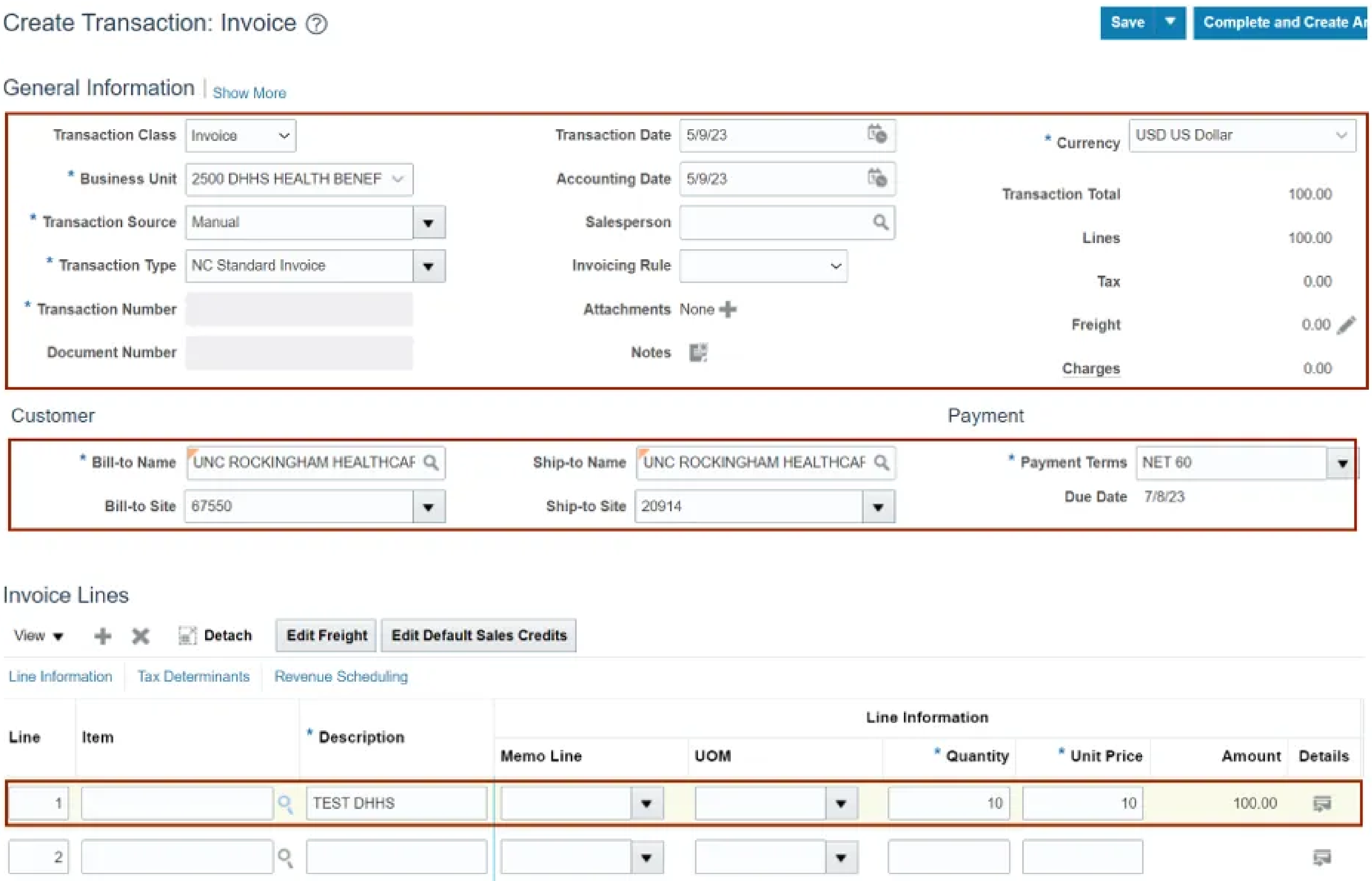
Image



Step 4. Enter the required details in ***General Information, Customer***, and ***Invoice Lines*** sections.

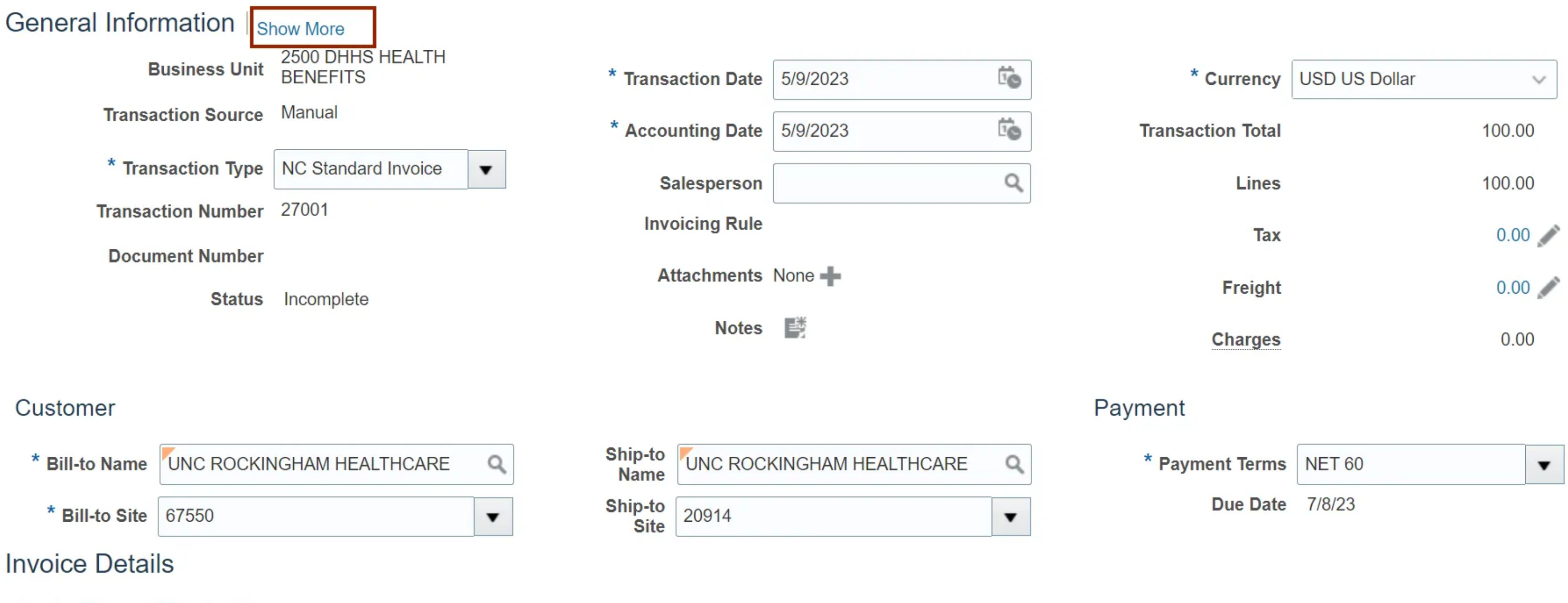
Note: The data entered is for training purposes only.

Image



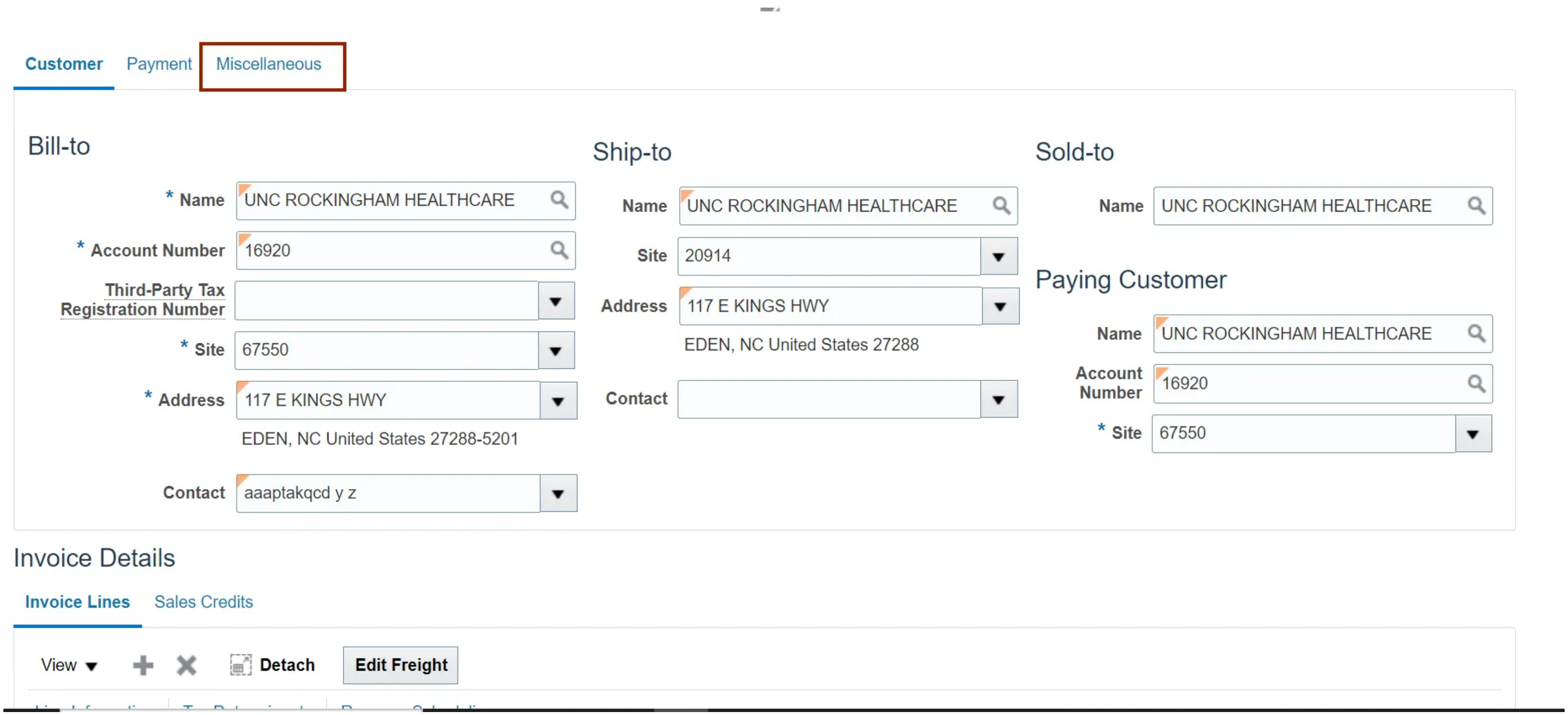
Step 5. Click the **Show More** link.

Image



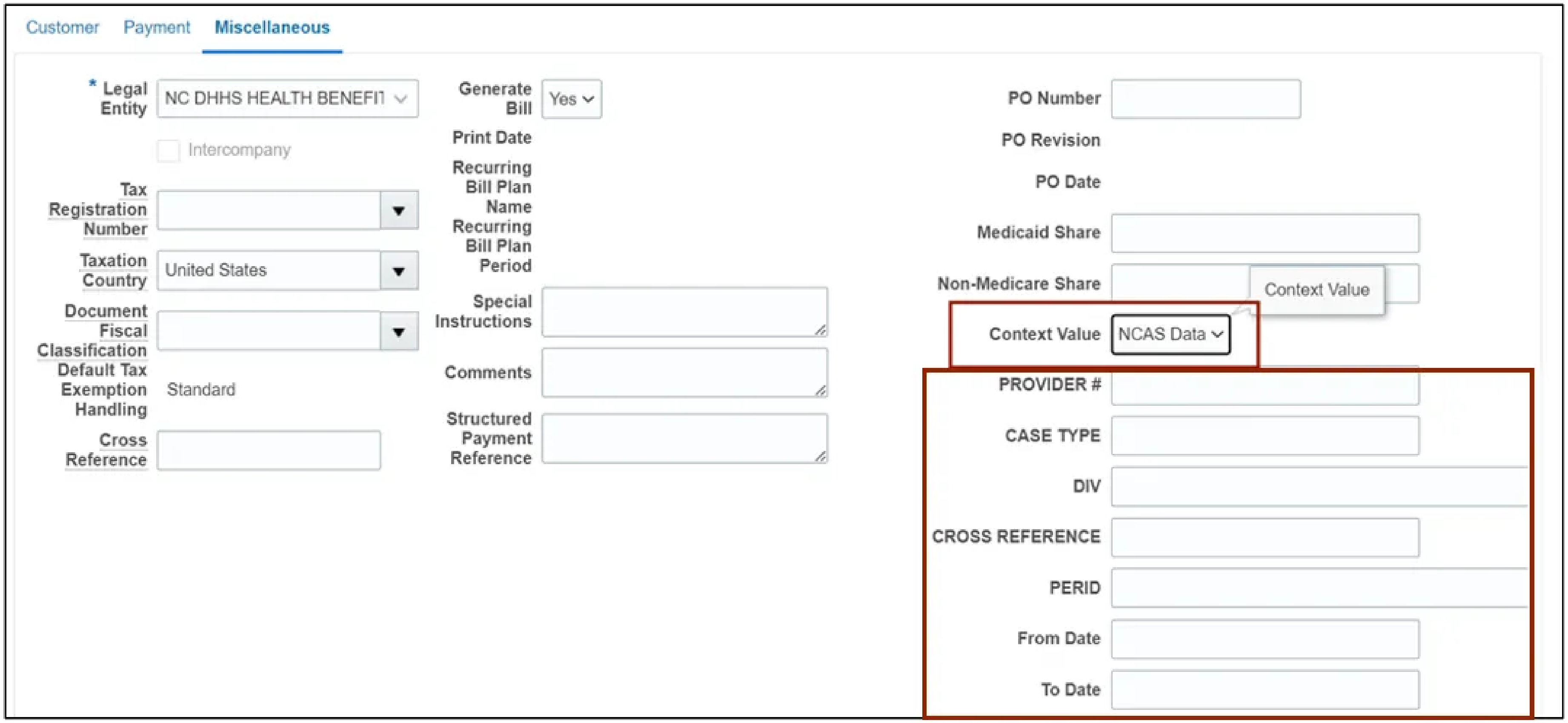
Step 6. Click the Miscellaneous tab.

Image



Step 7. Select **NCAS Data** from the *Context Value* drop-down choice list and enter other required details.

Image



Step 8. In the ***Invoices Details*** section, Click the **Details** icon.

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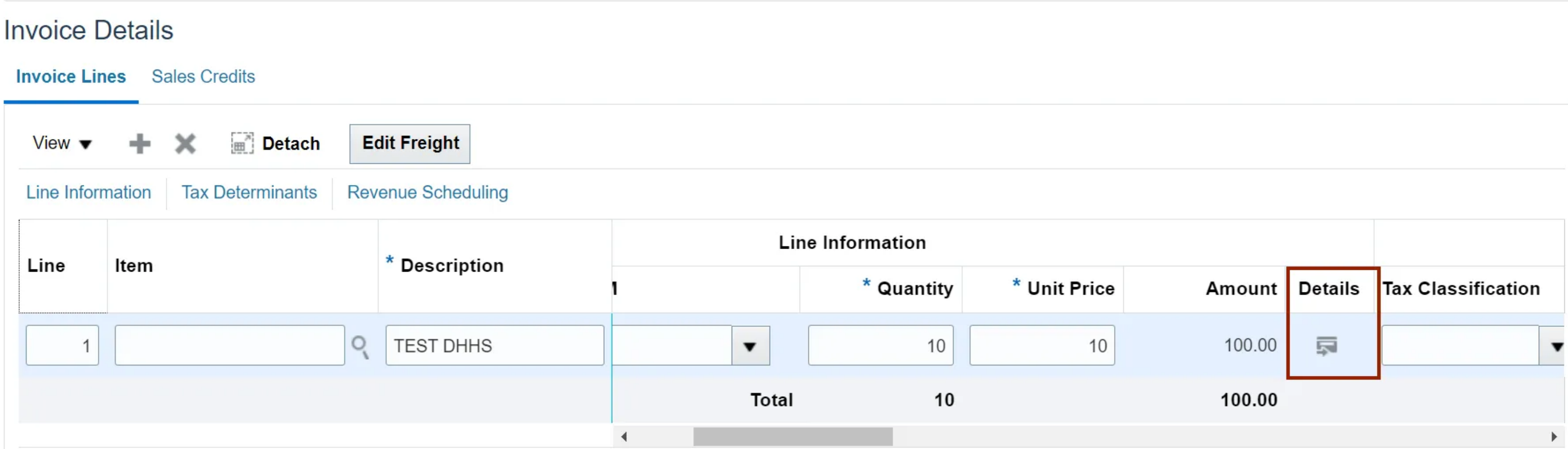
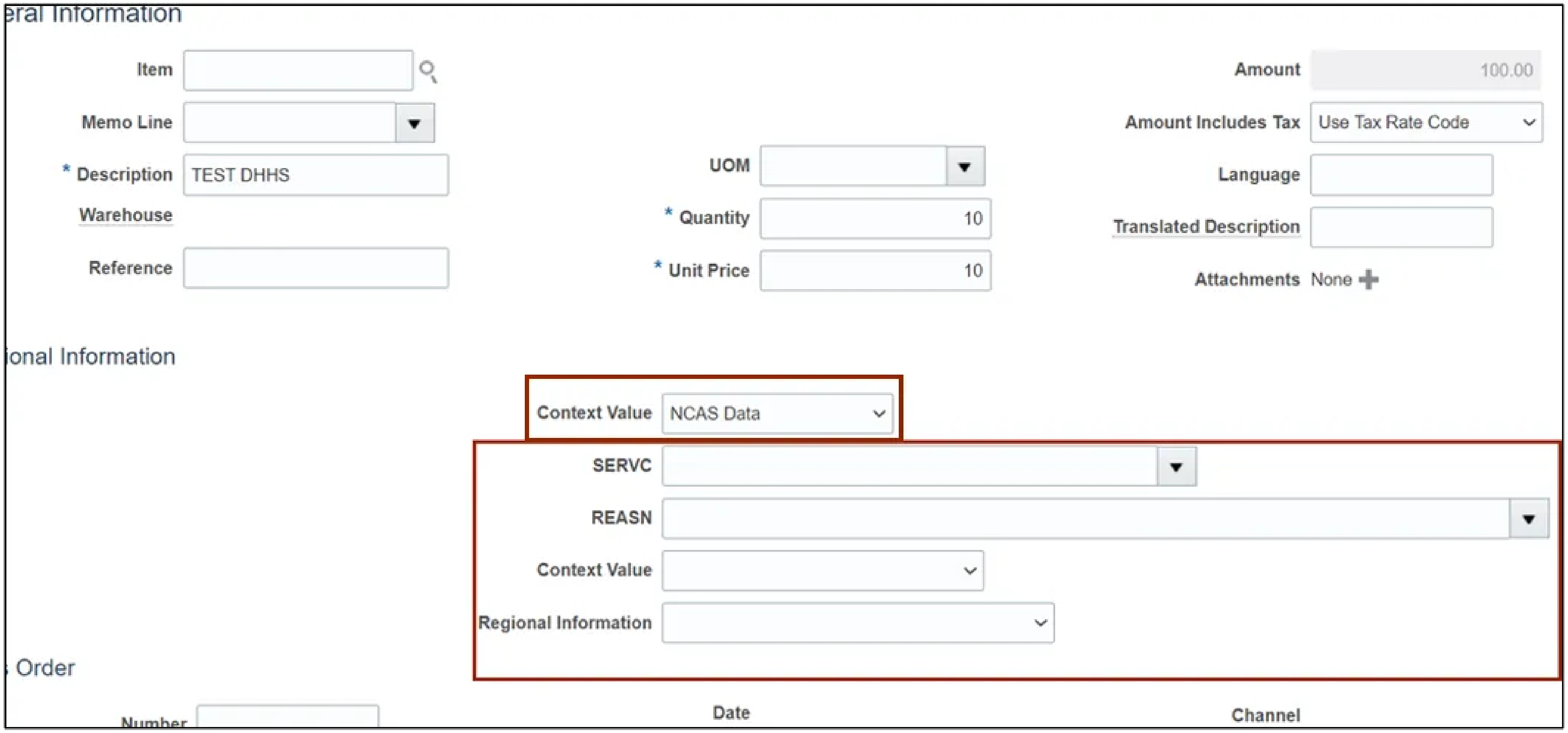


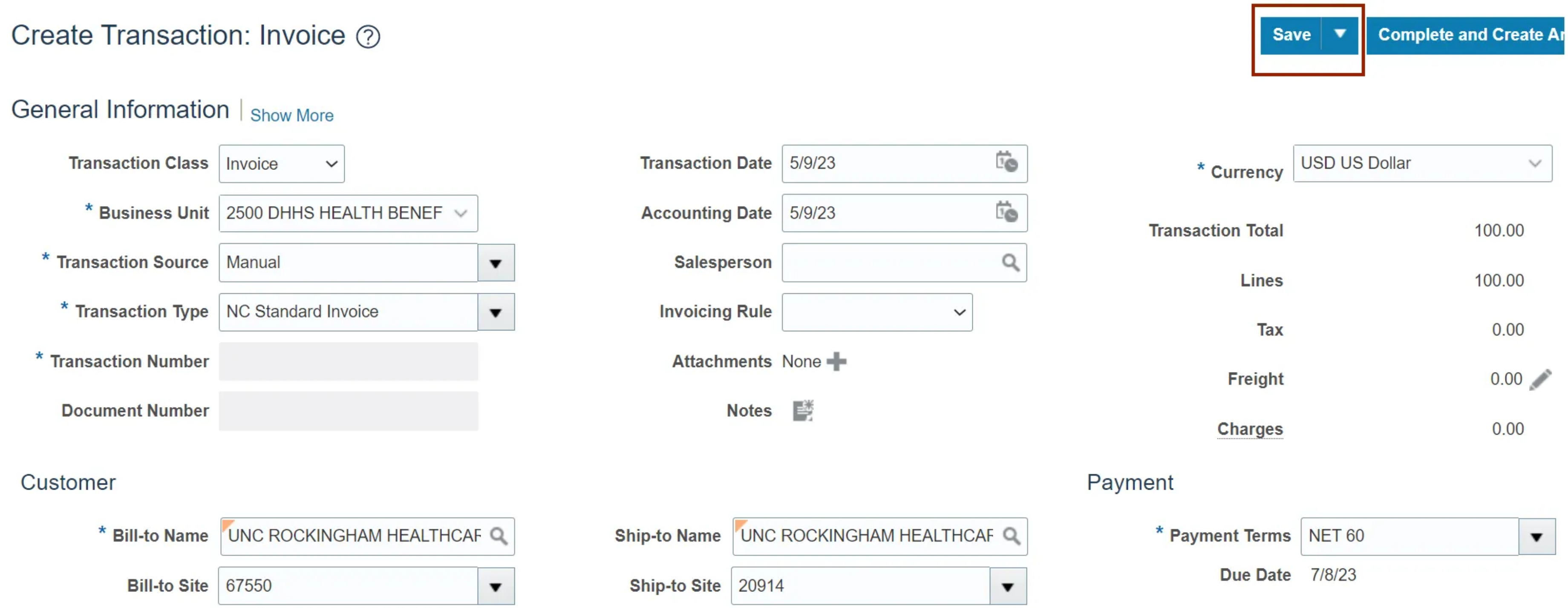
Step 9. Select **NCAS Data** from *Context Value* drop-down choice list and enter required data in the other fields.

Image



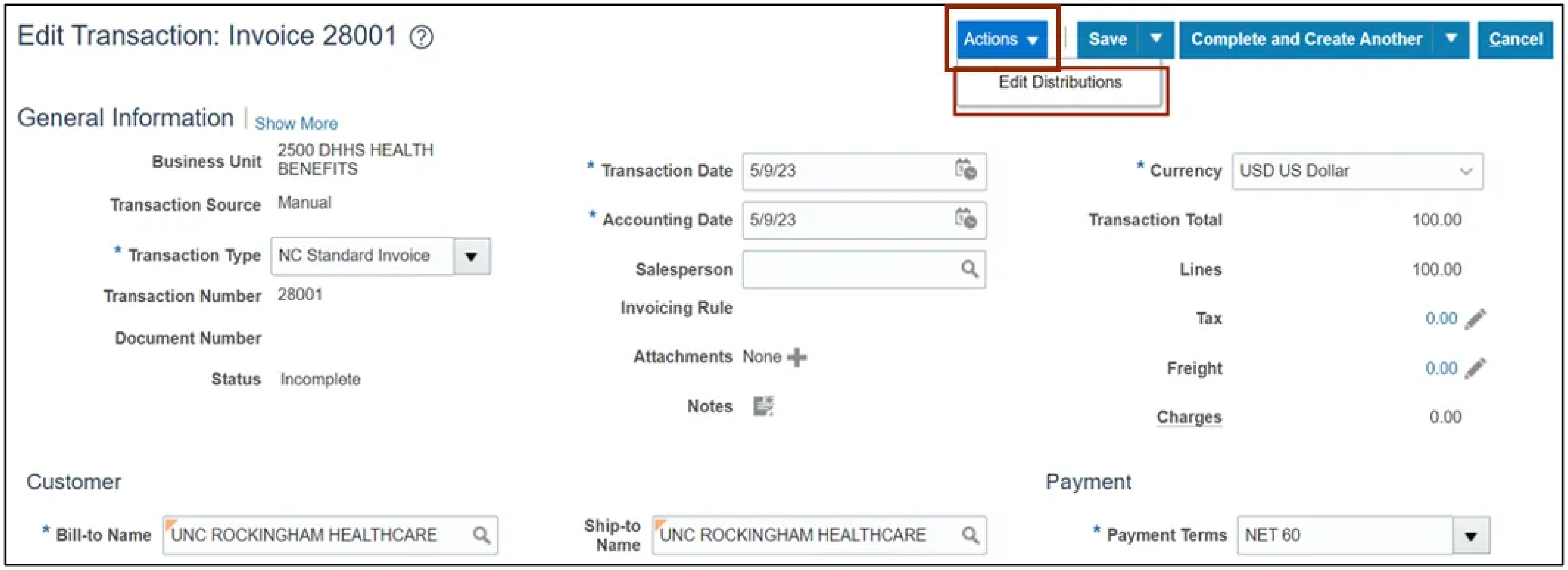
Step 10. Click the **Save** button.

Image



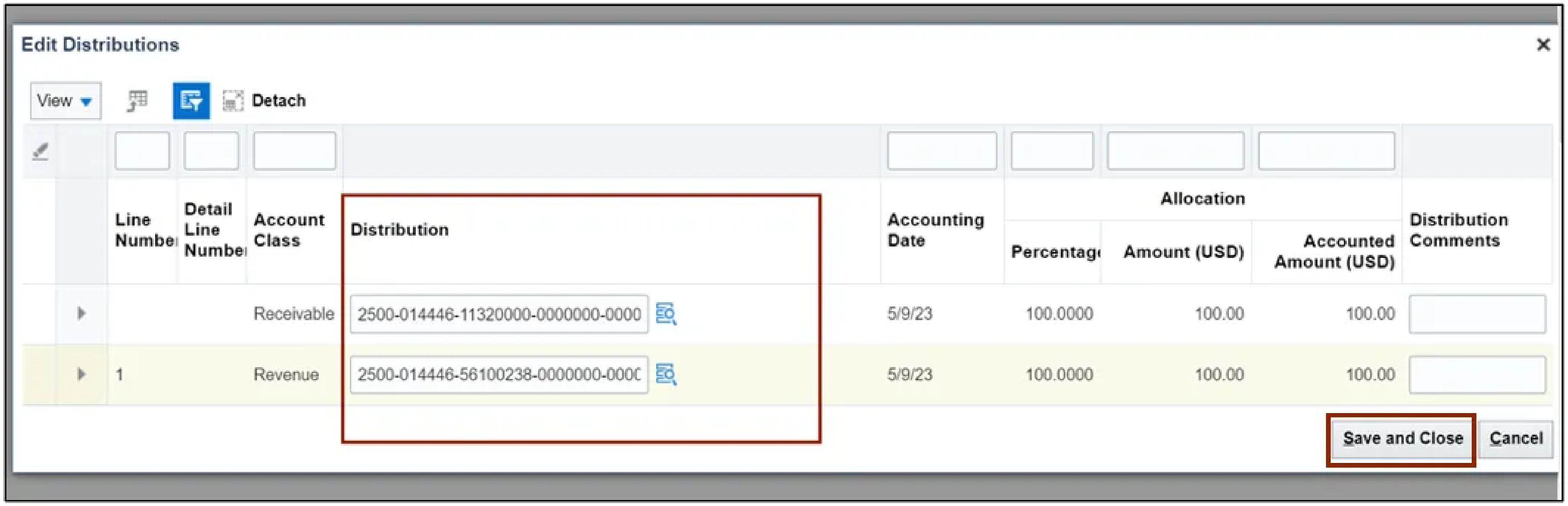
Step 11. Click the *Actions* drop-down choice list and select the **Edit Distribution** option.

Image



Step 12. Review the Revenue Charge Account details and click the **Save and Close** button.

Image



Step 13. Click the *Save* drop- down choice list and select the Save and Close option.

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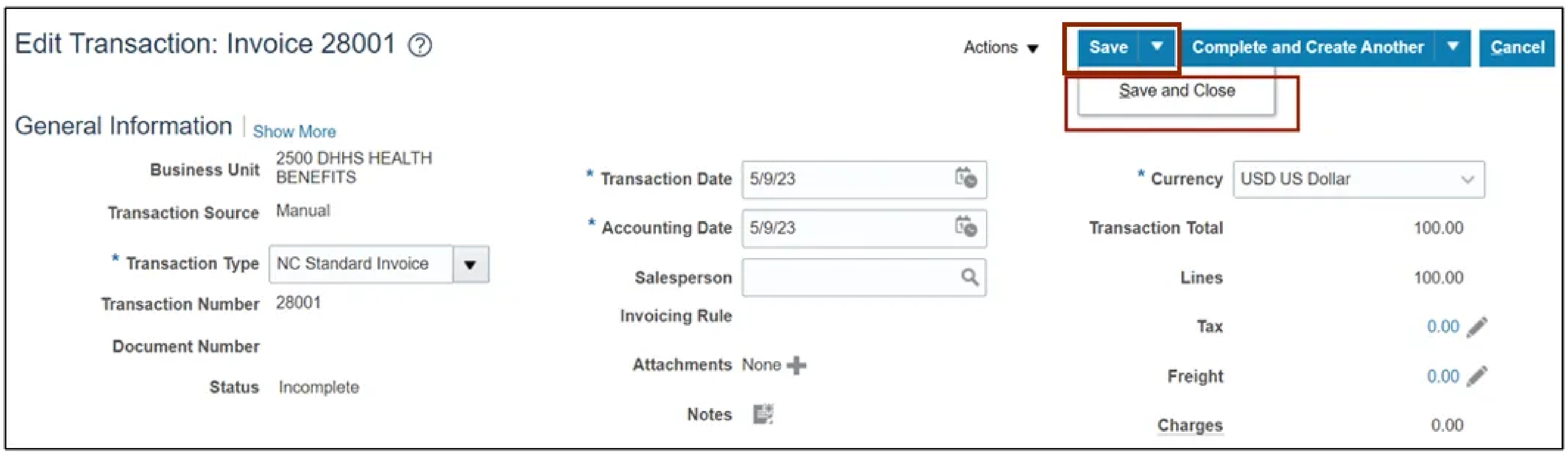
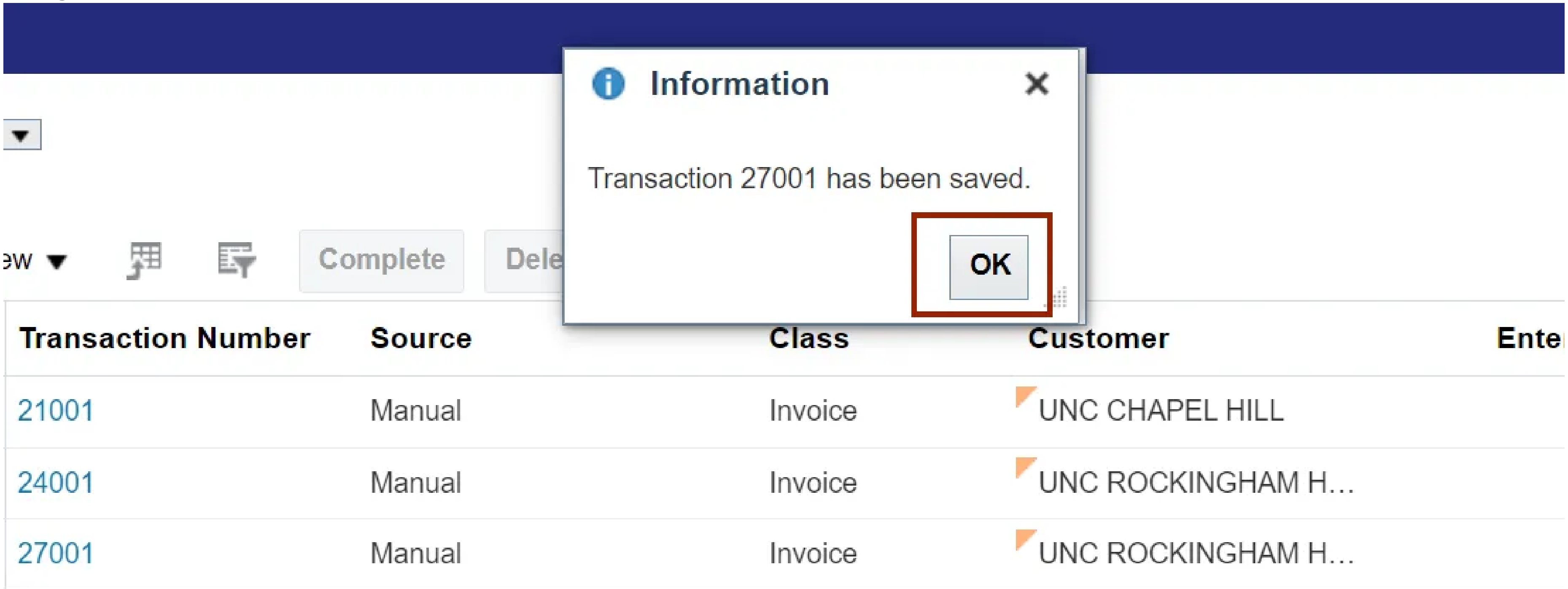


Step 14. An *Information* pop-up appears. Click the **OK** button.

Image



Wrap-Up

Create and Manage Invoices using the steps above in NCFS.

Additional Resources

- Virtual Instructor-Led Training (vILT)
  - AR-103: Invoice Management for DPI
  - AR-104: Invoice Management & Approvals for DHHS

First Published

Tue, 07/25/2023

Last Updated

Tue, 09/02/2025
View PDF