



# 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).

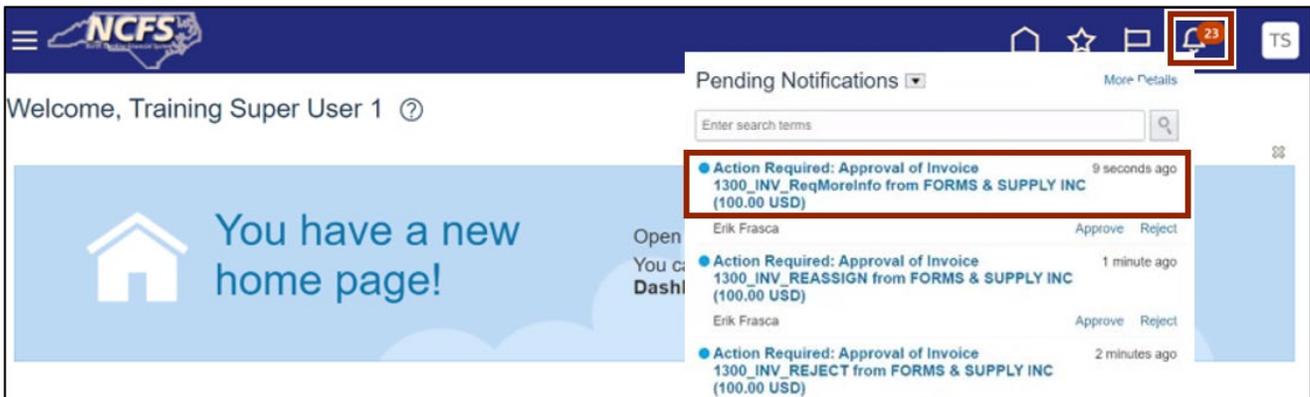
### Introduction and Overview

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\_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.13PTA

Business Unit 1300 DEPARTMENT OF ADMINISTRATION

**Amount Summary**

Line Type	Amount
Item	100.00
<b>Total</b>	<b>100.00</b>

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

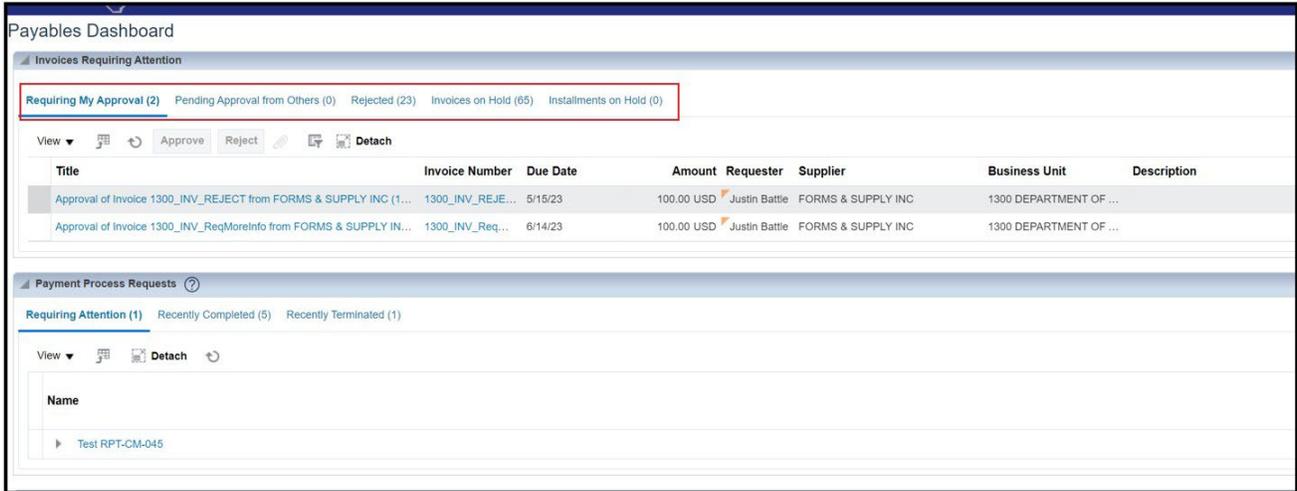
Note: Comments for approving an invoice is optional.

**Approve** **Submit** Cancel

Comment approved I

 Drag files here or click to add attachment v

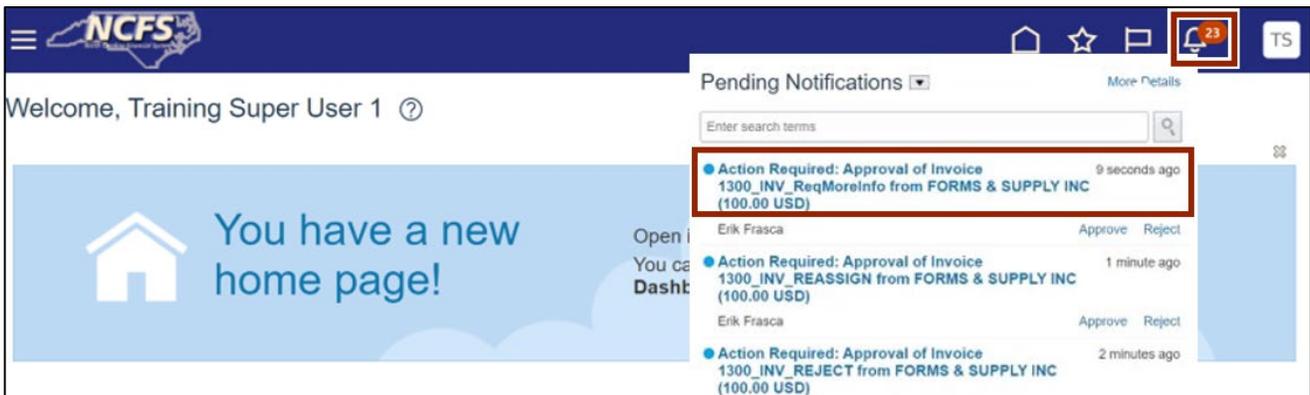
- Users can also navigate to **Home** page > **Payables** tab > **Payables Dashboard** to view the list of Invoices requiring attention and Approve or Reject from here.



## Reject Invoices

To Reject Invoices in NCFS, please follow the steps below:

- Log in to the NCFS portal with your credentials to access the system.
- On the **Home** page, click the **Notifications** [  ] 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 ▾ 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>

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.

**Reject** Submit Cancel

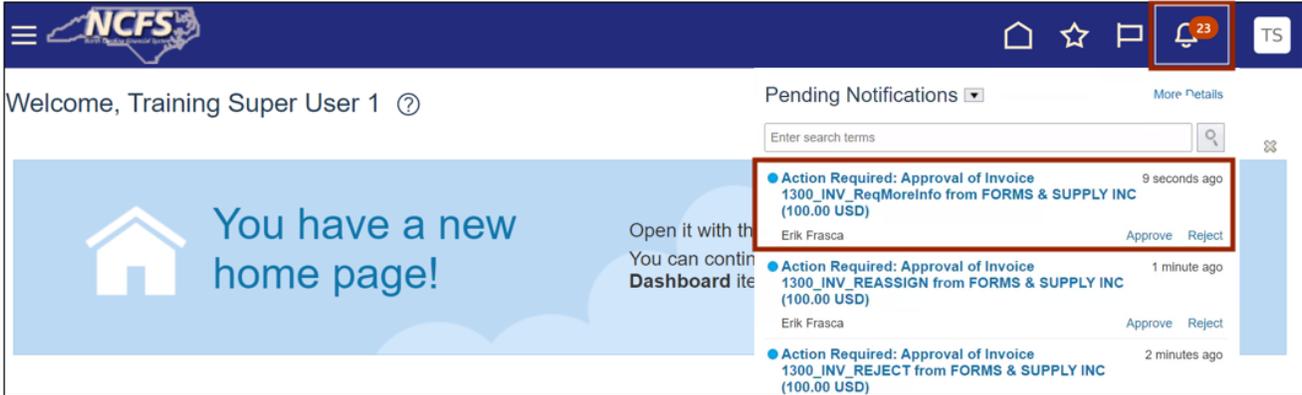
**Comment** Invoice Header details incorrect

 Drag files here or click to add attachment ▾

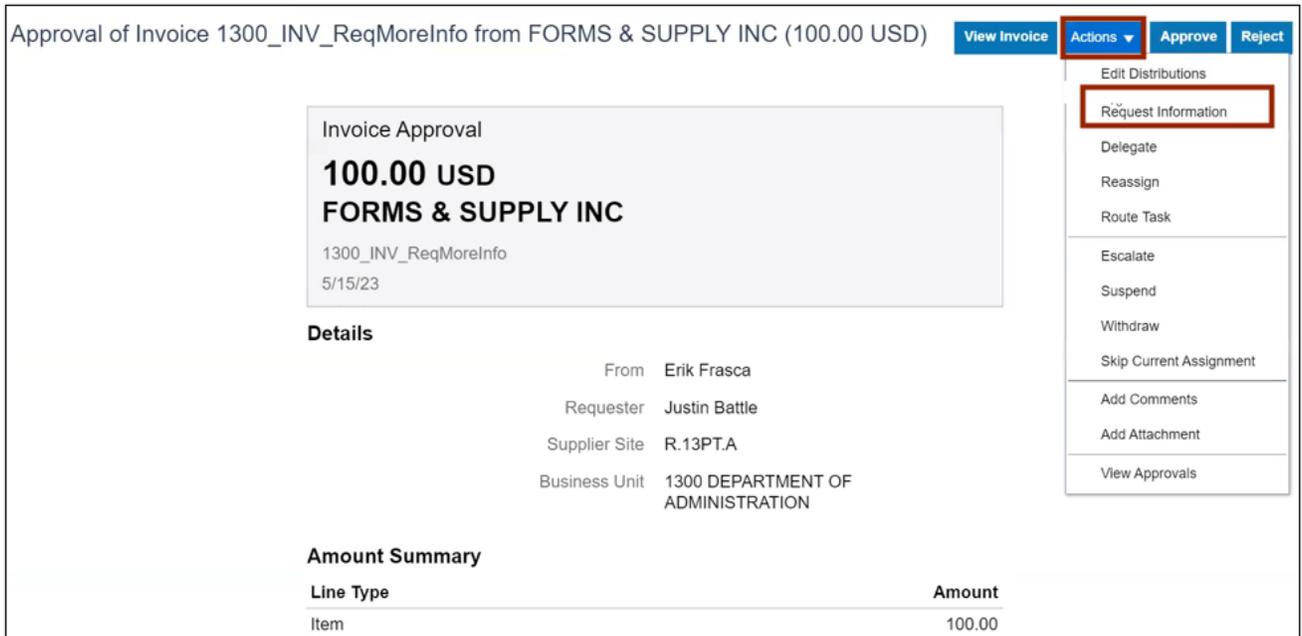
## Request Additional Information

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:

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



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



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 Information** Submit Cancel

\* Name

\* Comment

**Return Options**  Back to me  
 Follow approval flow

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

**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