

PO-14 Requisition Preferences

Purpose

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

Introduction and Overview

This QRG covers the steps to update Requisition Preferences.

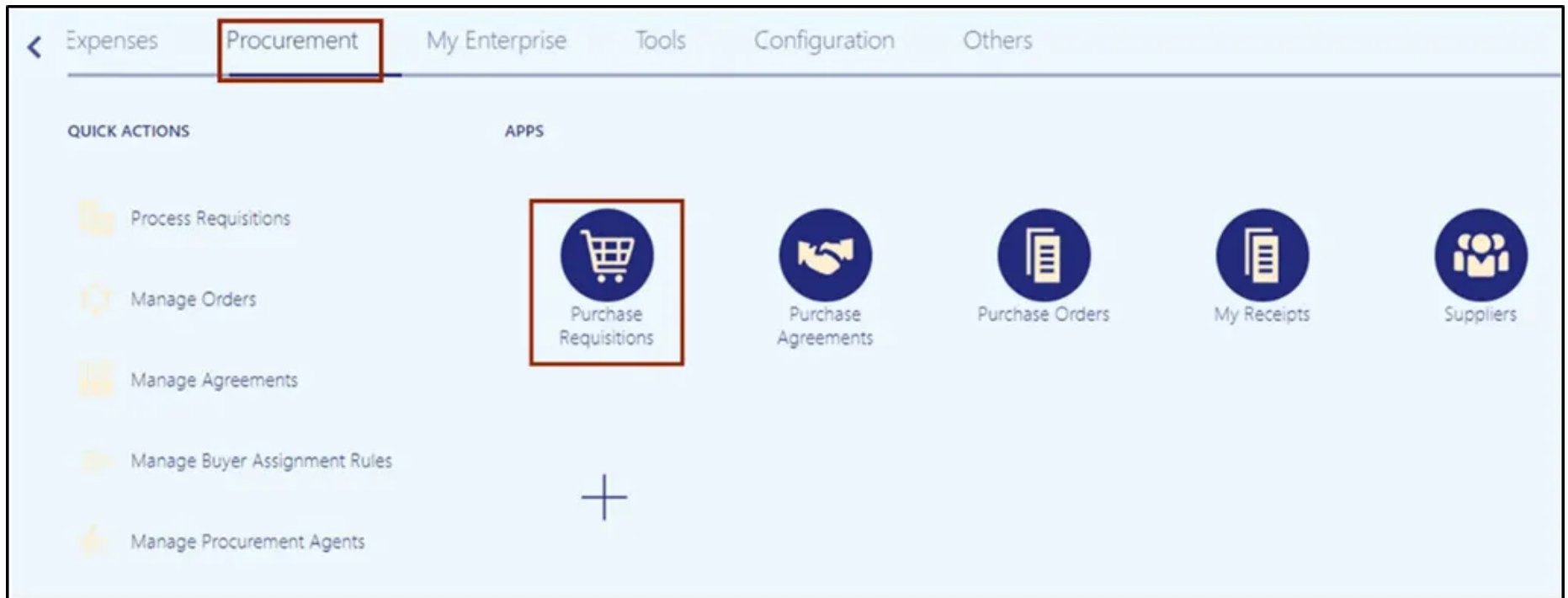
Update Requisition Preferences

To update requisition preferences in NCFS, please follow these steps. There are 4 steps to complete this process.

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

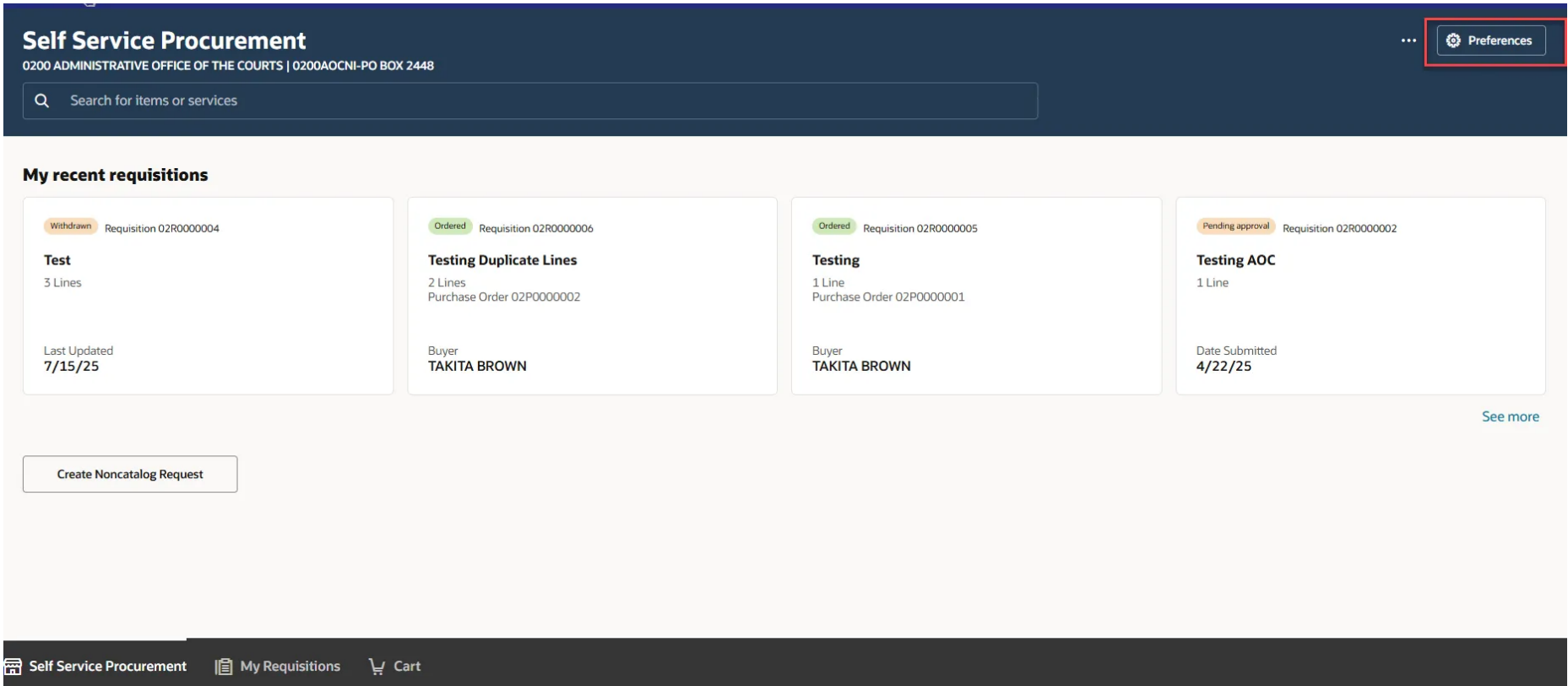
Step 2. On the **Home** page, select the **Procurement Tab**. Select the **Purchase Requisitions** app.

Image



Step 3. Select **Preferences** in the top right corner.

Image



Step 4. The **Preferences** pop-up appears. Under the **Delivery** section, enter/update the **Requester**, **Deliver to Location** and **Destination Type** details, then select the **Update** button.

In this example, we used:

- **Requester:** Takita Brown
- **Deliver to Location:** 0200AOCNI-PO BOX 2448
- **Destination Type:** Expense

* Note: You can also set **Charge Accounts** (*this account will default on all Requests*) and choose Display settings.

Image

Preferences



Requisitioning BU

Requisitioning BU

0200 ADMINISTRATIVE OFFICE OF THE COURTS

Delivery

Requester
TAKITA BROWN



Deliver to Location
0200AOCNI-PO BOX 2448



Destination Type
Expense



Charge accounts



Display settings

Display preferences apply to all BUs you have access to.

- ☐ Show the table view for the cart
- ☐ Show the table view for search results
- ☐ Show the requisitions view for my requisitions

Wrap-Up

Reassign Update requisition preferences in NCFS using the steps above.

Additional Resources

- Virtual Instructor-Led Training (vILT)
 - [PO101: PO Procurement Requester](#)
- Web Based Training (WBT)
 - [PO107: PO Advanced Procurement Requestor](#)

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