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.

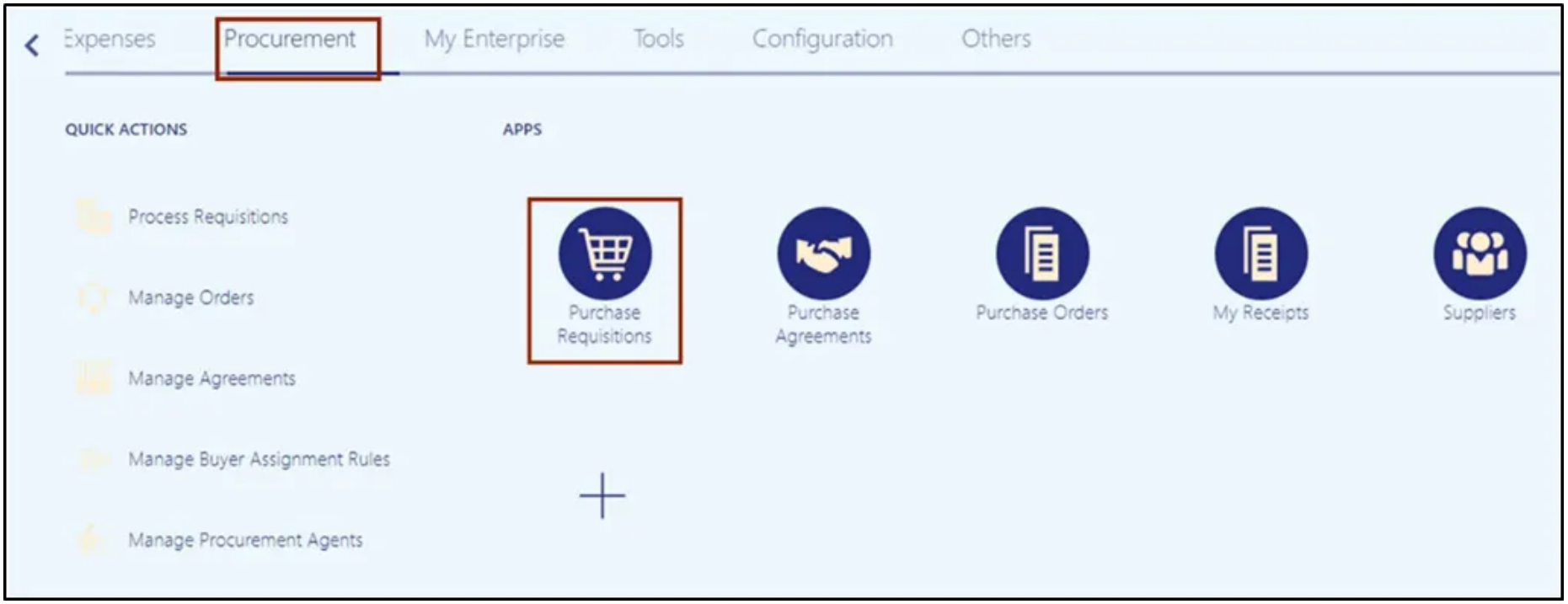
Update Requisition Preferences

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.

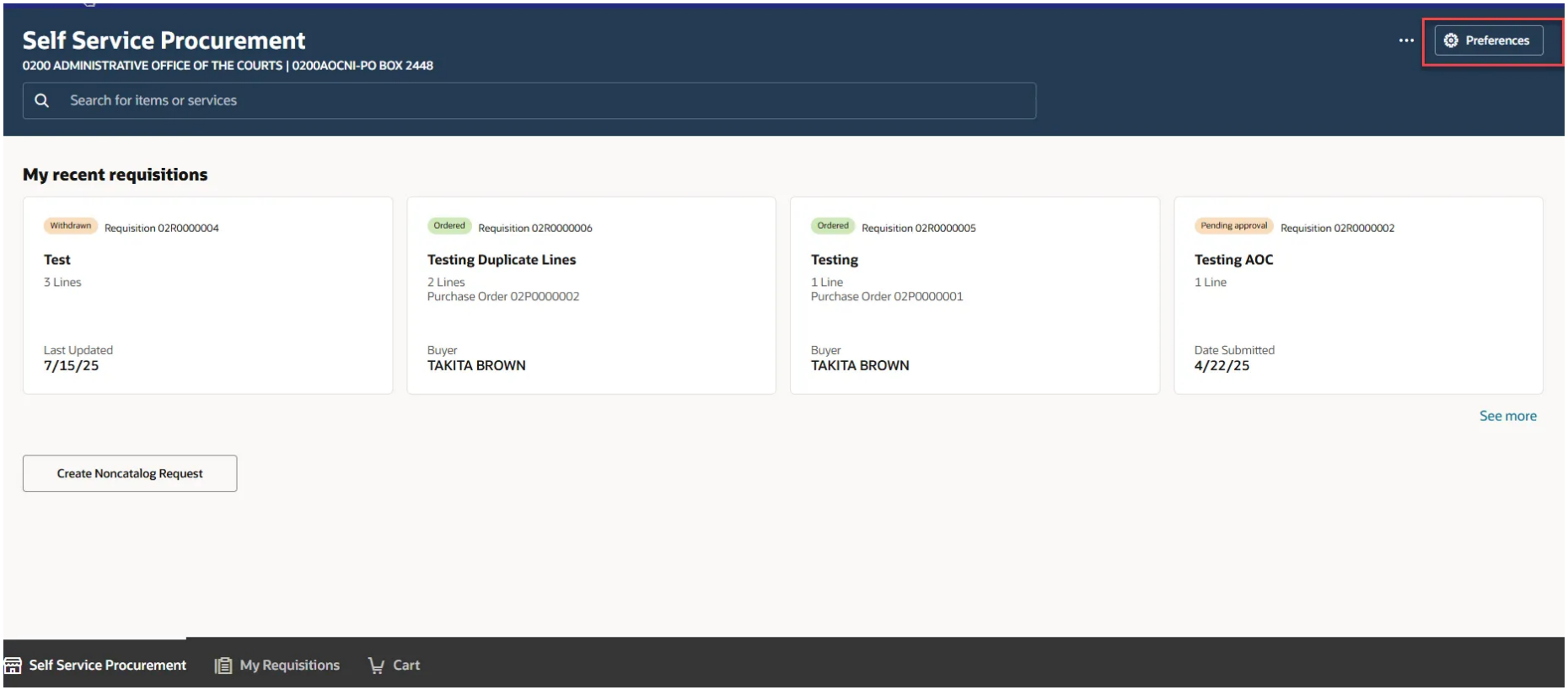
Step 2. On the **Home** page, select the **Procurement Tab**. Select the **Purchase Requisitions** app.

Image



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

Image



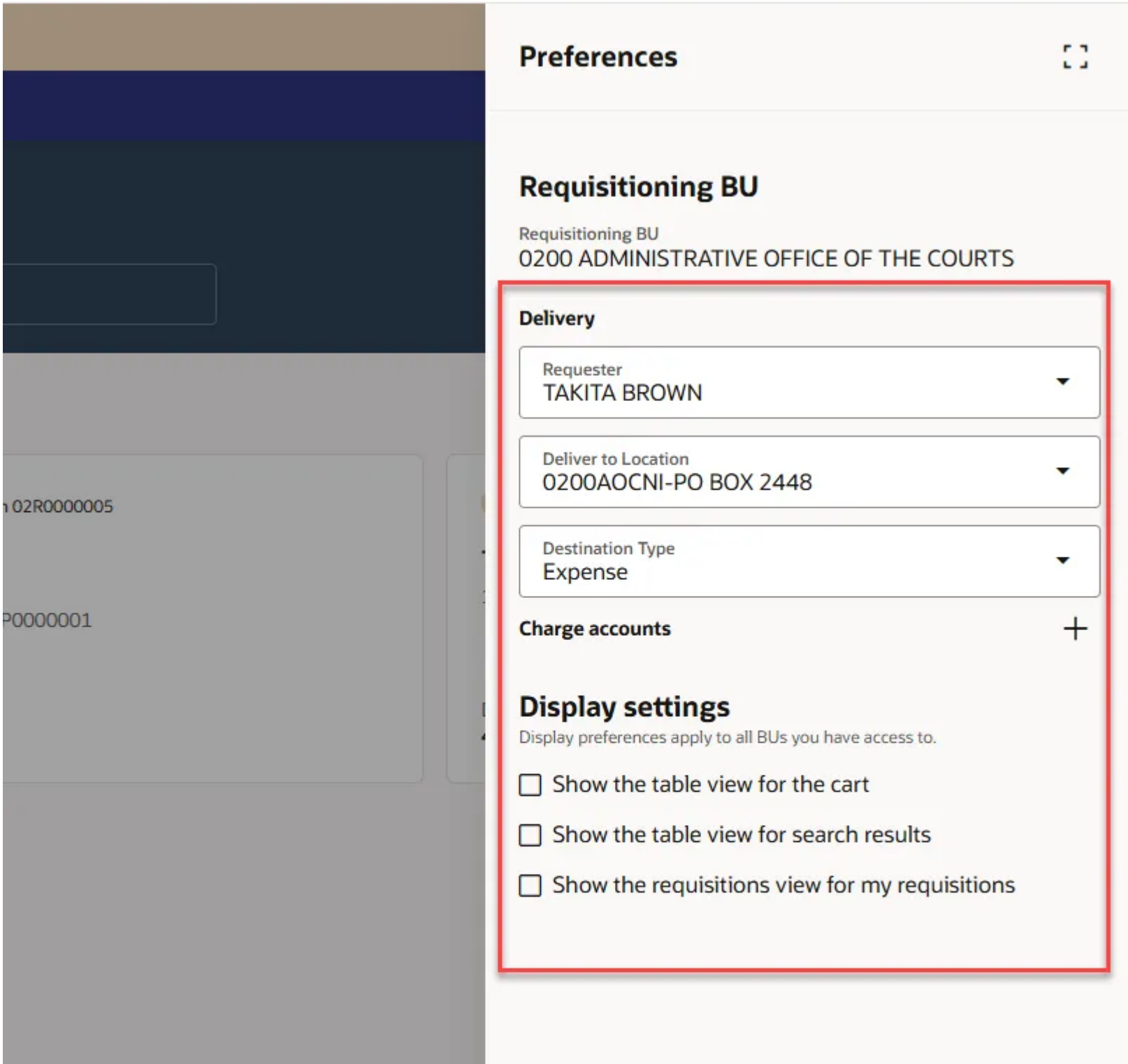
Step 4. The **Preferences** pop-up appears. Under the **Delivery** section, enter/update the **Requester, Deliver to Location** and **Destination Type** details, then select the **Update** button.

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 Requestions*) 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
02R0000005
P0000001

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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