AR-22 Manage Autoinvoice Lines

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of how to Manage Auto Invoice Lines in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process of Manage Autoinvoice Lines. This process provides information on identifying errors, correcting them, uploading the updated data, and submitting the sales order for successful invoice creation.

Manage Autoinvoice Lines

To approve expenses via the **notification bell** icon, please follow the steps below. There are 19 steps to complete this process.

Step 1. Log in to the NCFS portal using the **Company Single Sign-On (SSO)** button.

Step 2. Enter your **@dac.nc.gov** email address.

Step 3. Click **Next**, then enter your **password**.

NOTE: The system will automatically sign on using SSO and log in to NCFS. After the first login using SSO, future access may not require credentials. If SSO is not available, enter credentials manually within the **Username** and

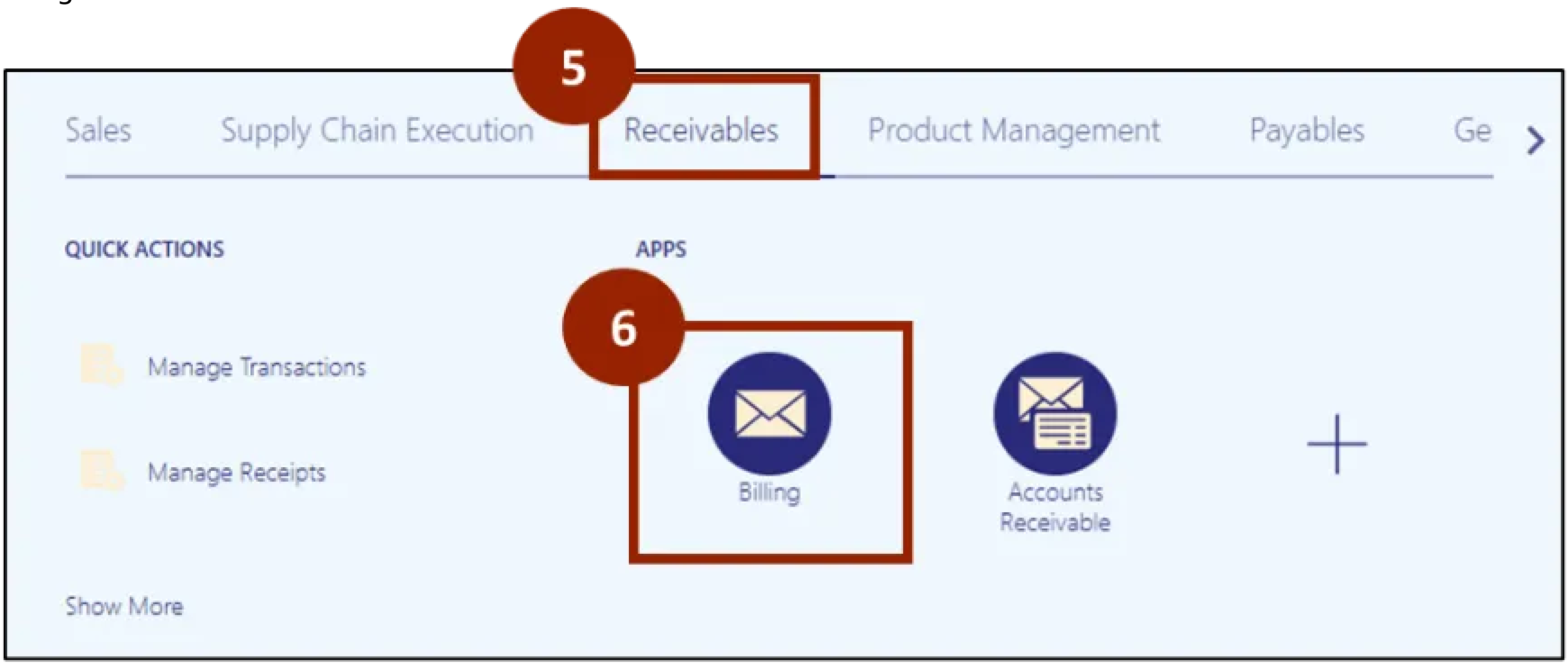
Password fields, then click **Sign-In**.

Step 4. Navigate to the **Home** page.

Step 5. Click on the **Receivables** tab.

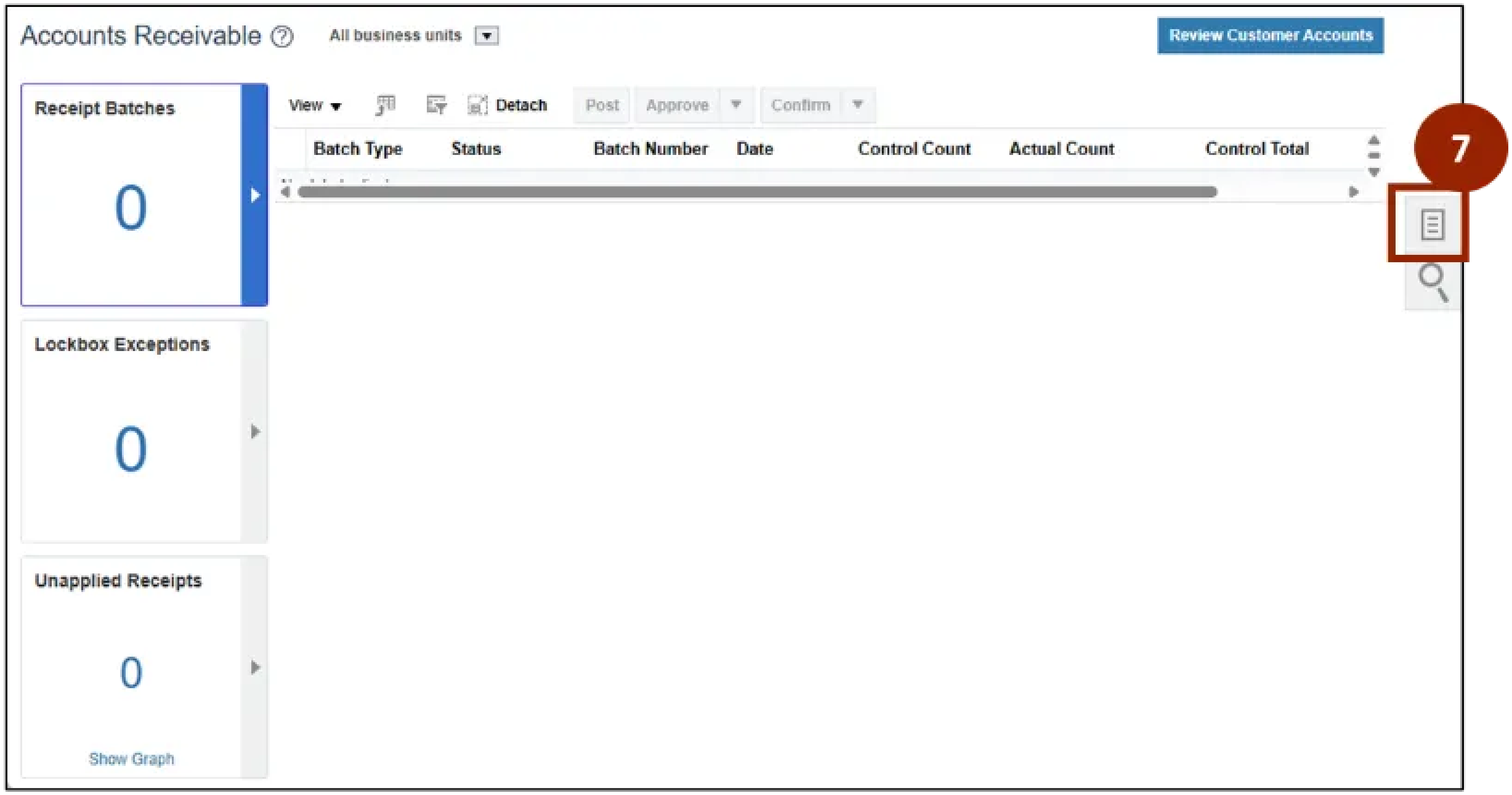
Step 6. Click on **Billing**.

Image



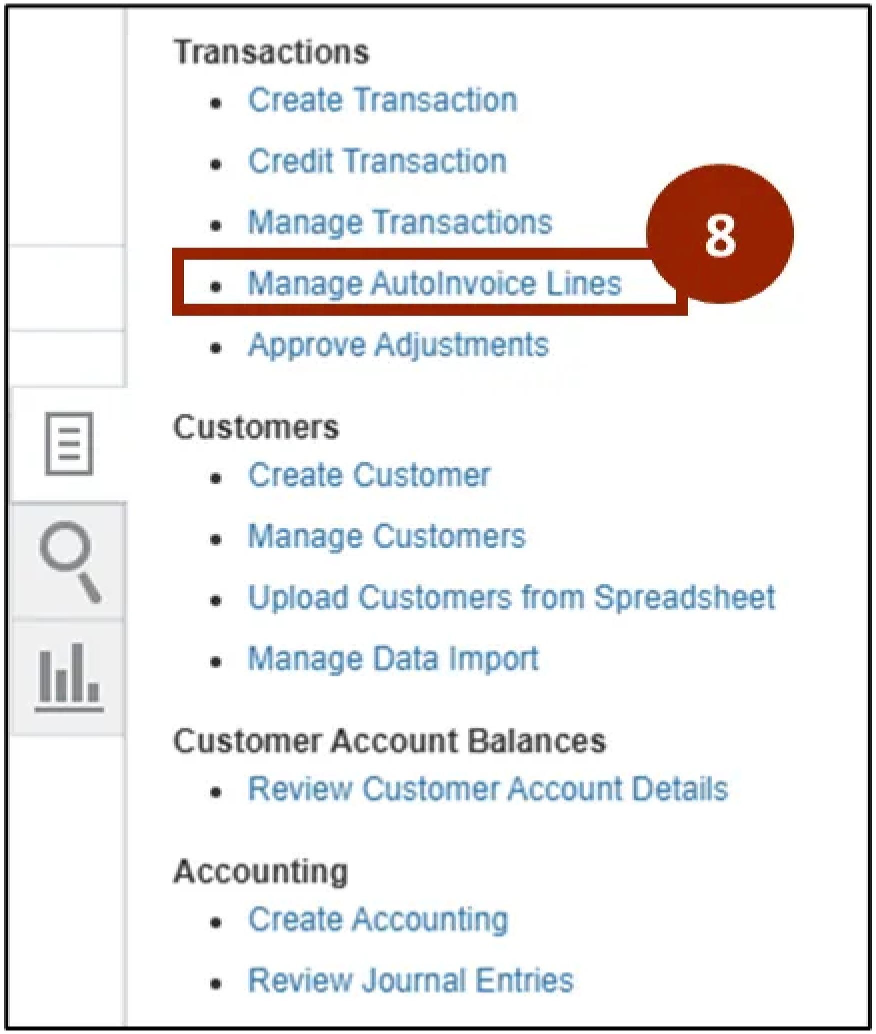
Step 7. On the **Billing** page, click the **Task** icon.

Image



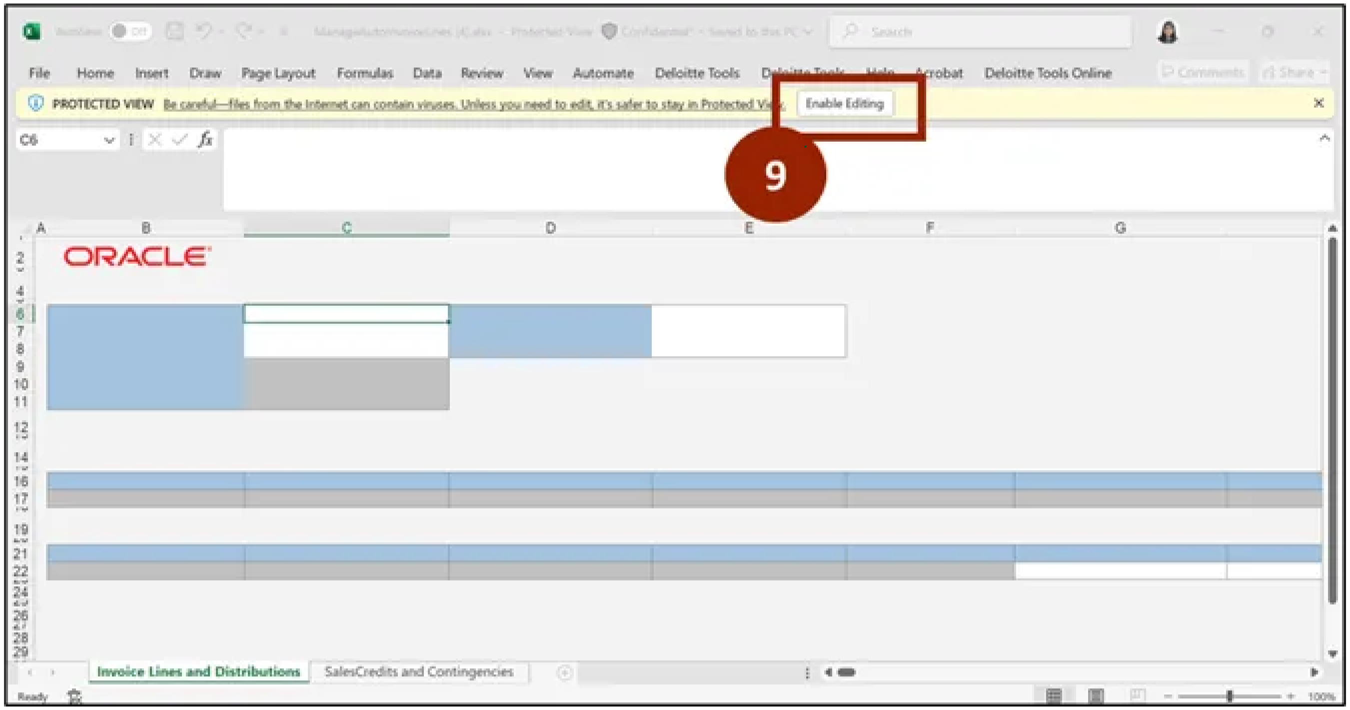
Step 8. Select the Manage AutoInvoice Lines option.

Image



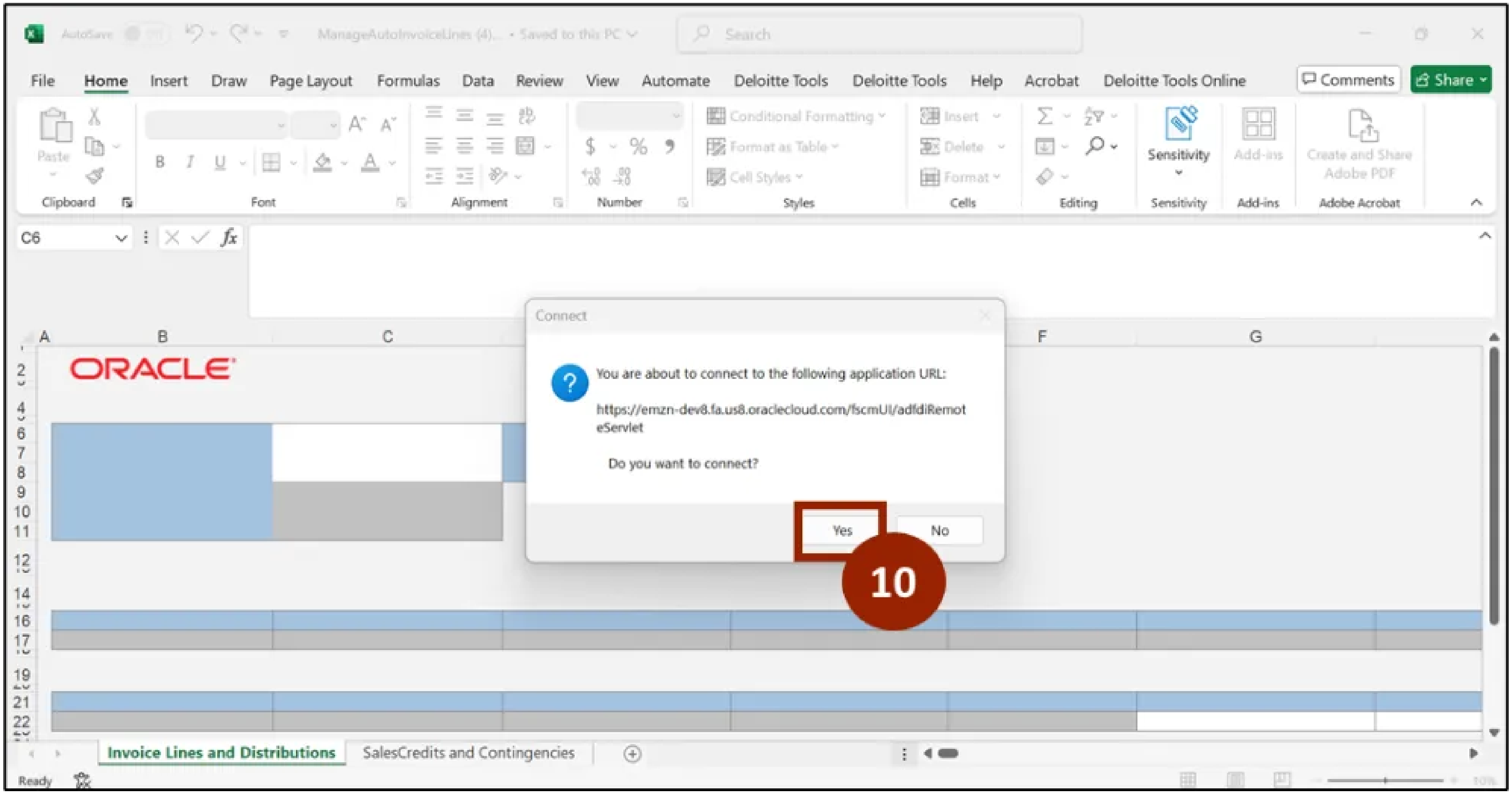
Step 9. When the Excel workbook opens, select **Enable Editing** in the yellow security banner.

Image



Step 10. A security pop-up appears asking whether you want to access the specified application URL. Click **Yes**.

Image



Step 11. When the **Oracle sign-on** page appears, enter your **SSO username** and **password**, then click **Sign In**.

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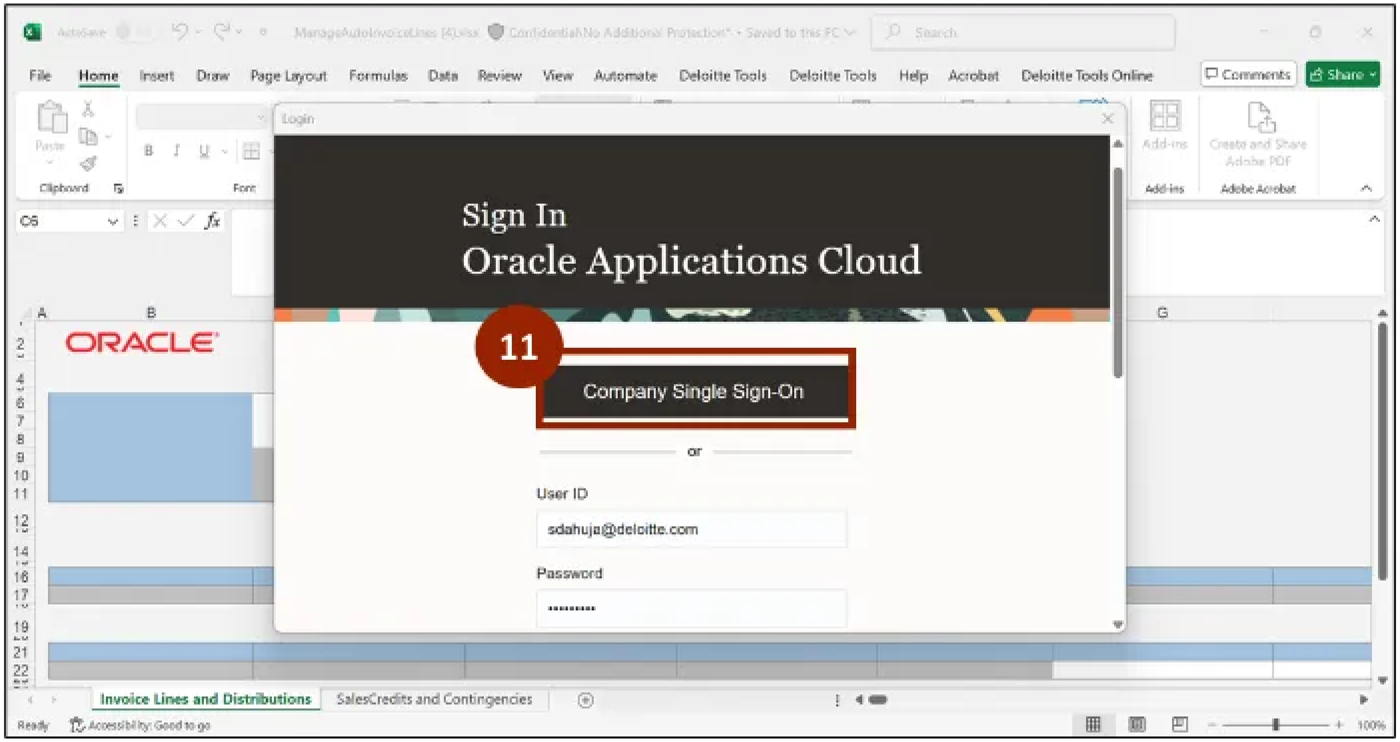
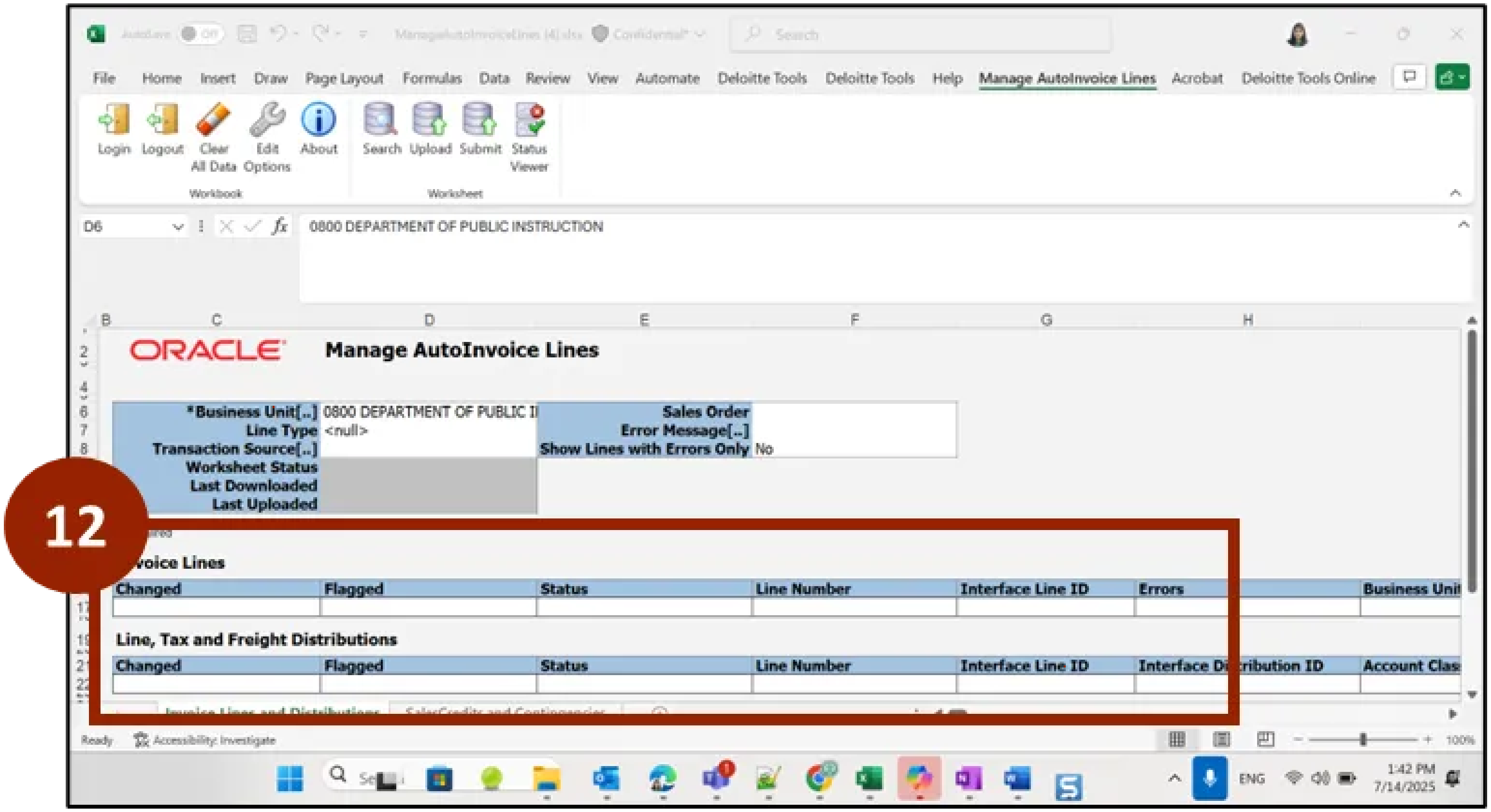


Step 12. The spreadsheet opens, and displays the Invoice Lines, Lines, Tax, and Freight Distributions.

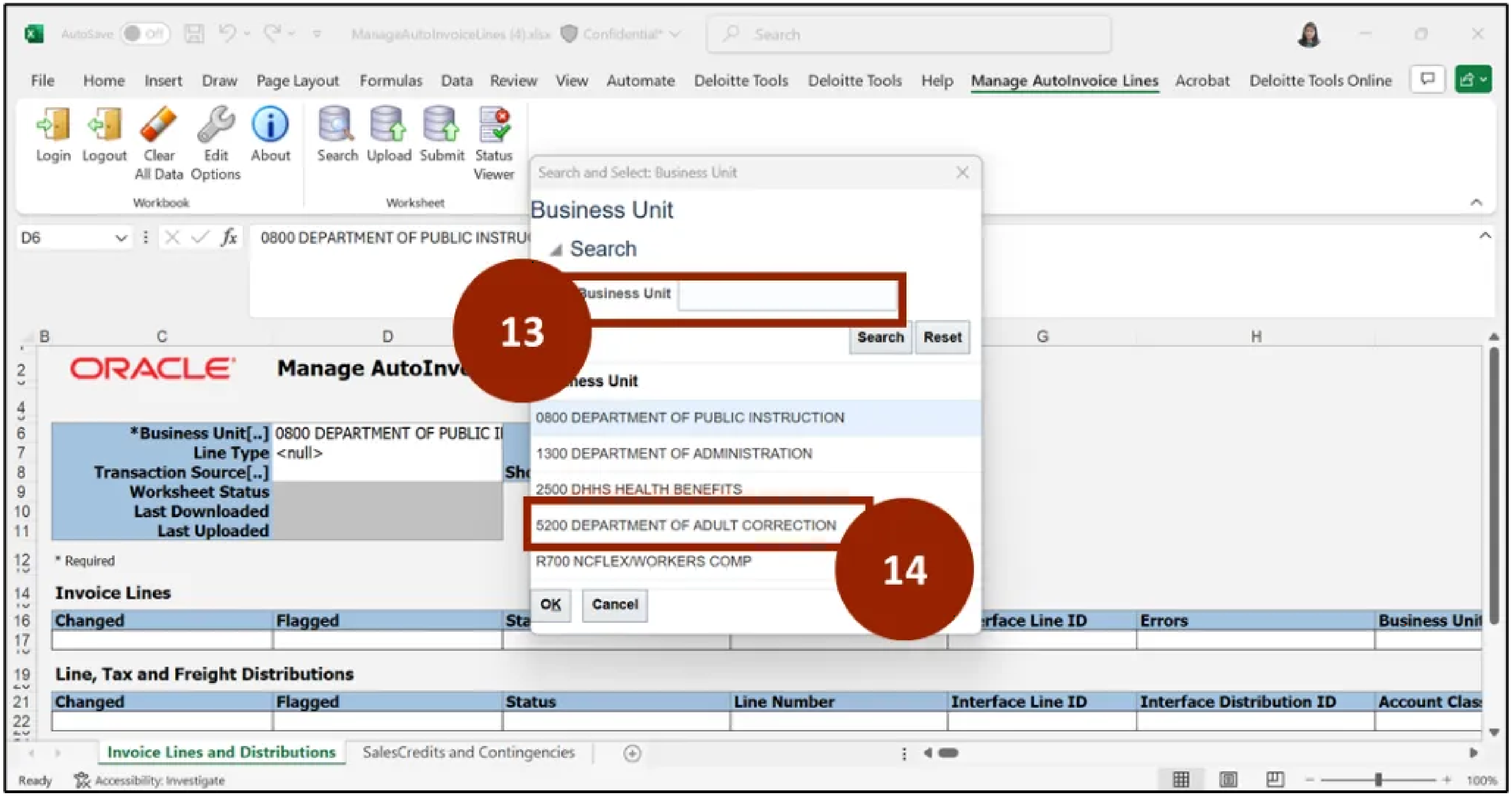
Image



Step 13. Select the **Business Unit** field.

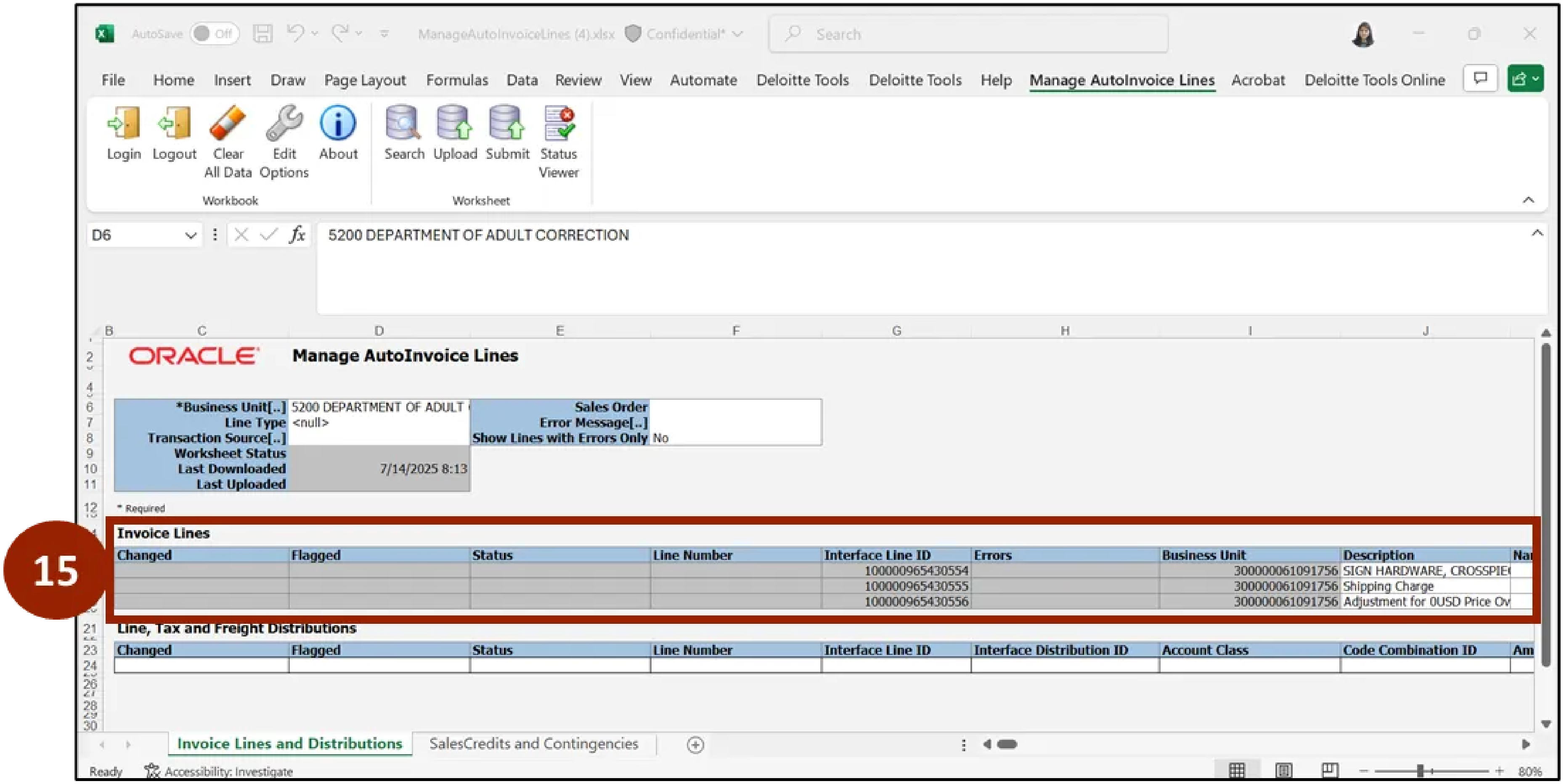
Step 14. From the drop-down, select **5200 – Department of Adult Correction** to display any error lines for the relevant sales order.

Image



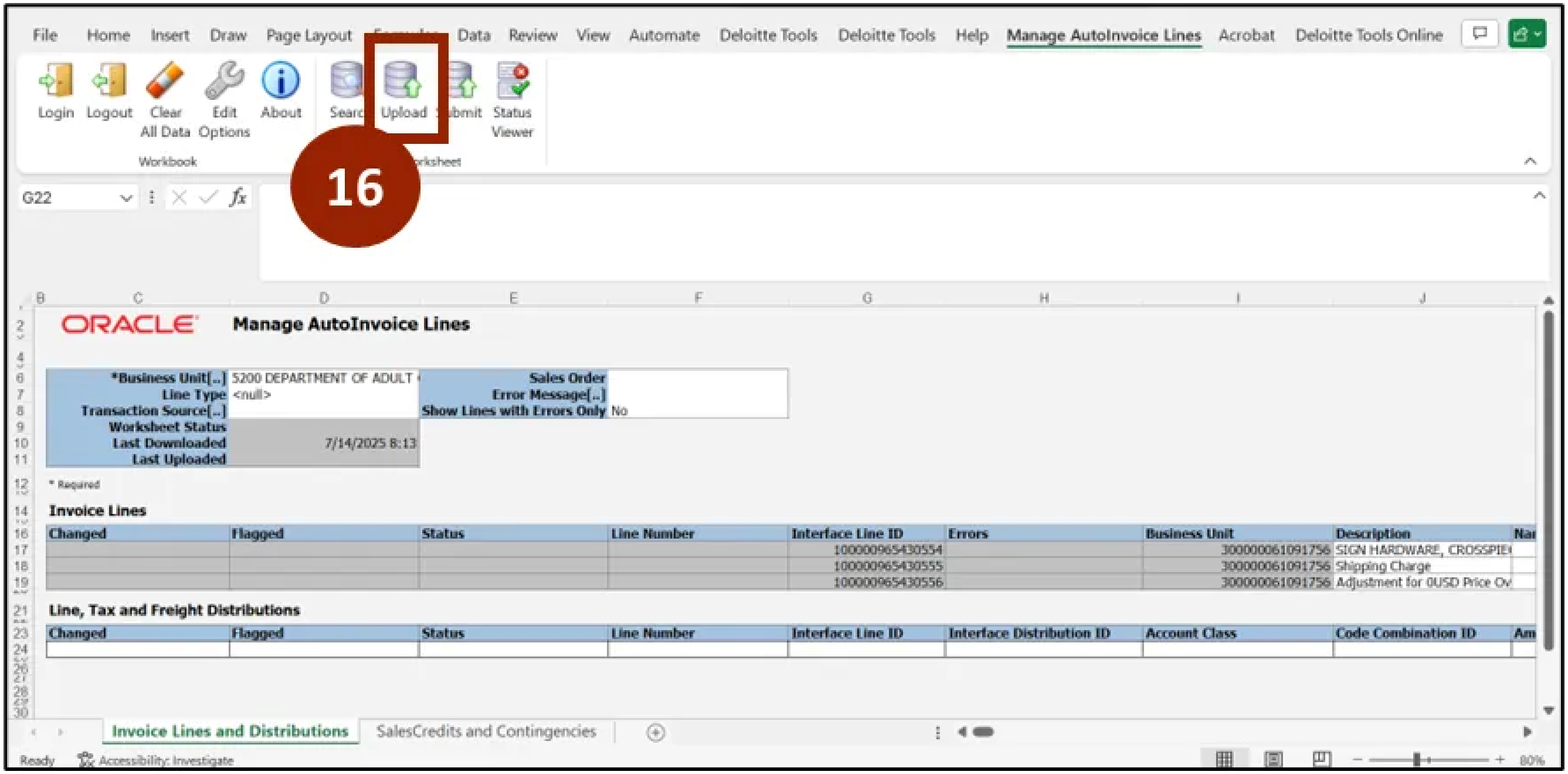
Step 15. The sheet displays the errors that must be resolved before the sales order can be converted into an invoice.

Image



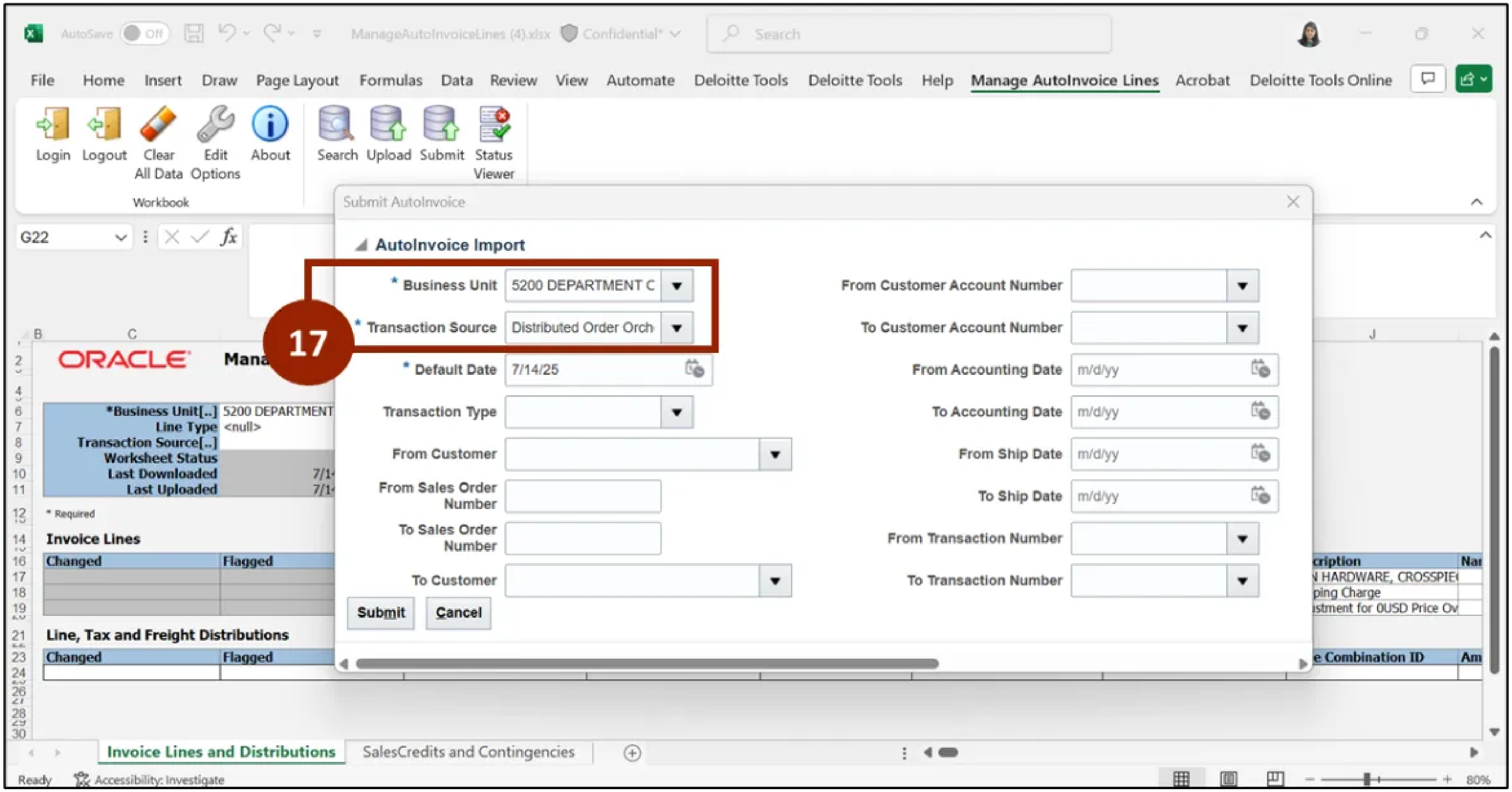
Step 16. After updating the errors, click **Upload**.

Image



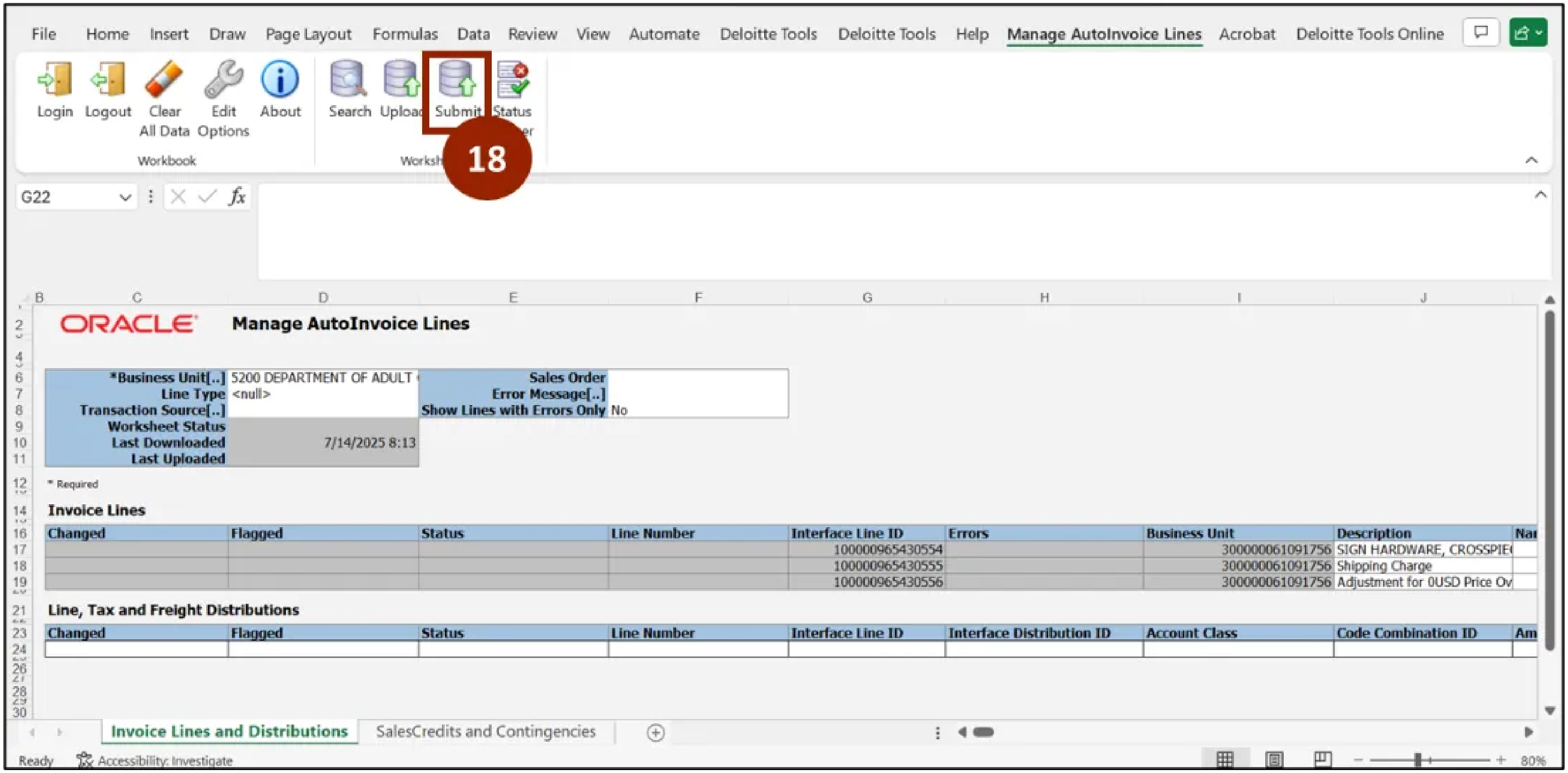
Step 17. To submit the AutoInvoice, select **5200 Department of Adult Correction** as the **Business Unit** and **Distributed Order Orchestration** as the **Transaction Source**.

Image



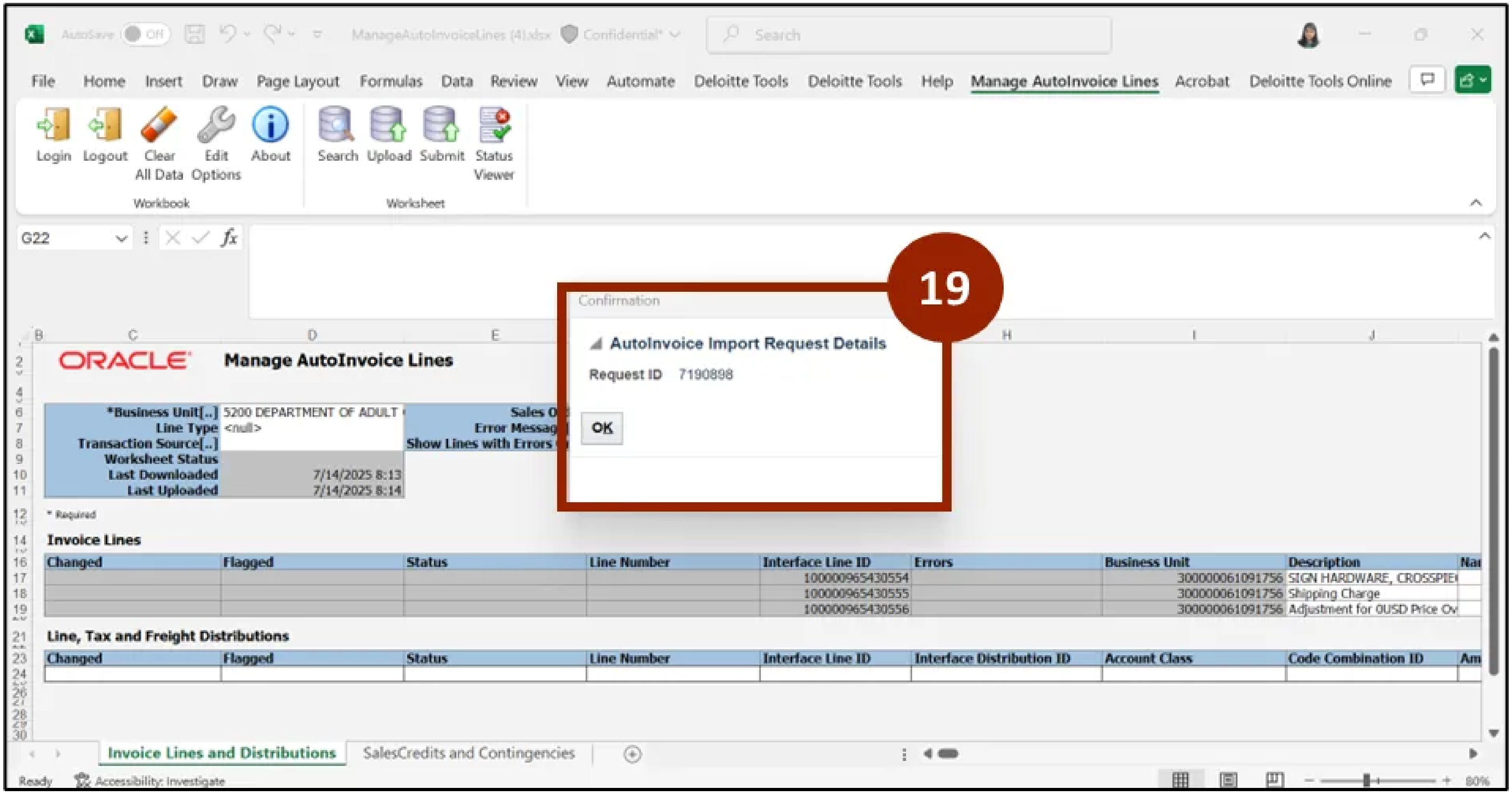
Step 18. Click **Submit** to finalize the sales order.

Image



Step 19. A confirmation message will appear indicating successful submission. Select **OK**.

Image



Wrap-Up

NCFS users can reference the **Manage Autoinvoice Lines** using the steps above.

Additional Resources

- Instructor Led Training (ILT)

- AR107: Manage Billing

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