AR-23 Calculate and Manage Tax

Purpose

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

Introduction and Overview

This QRG covers the process of Calculate and Manage Tax. This process provides information on applying methods to calculate and manage tax amounts on invoices accurately.

Calculate and Manage Tax

To approve expenses via the notification bell icon, please follow the steps below. There are 17 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

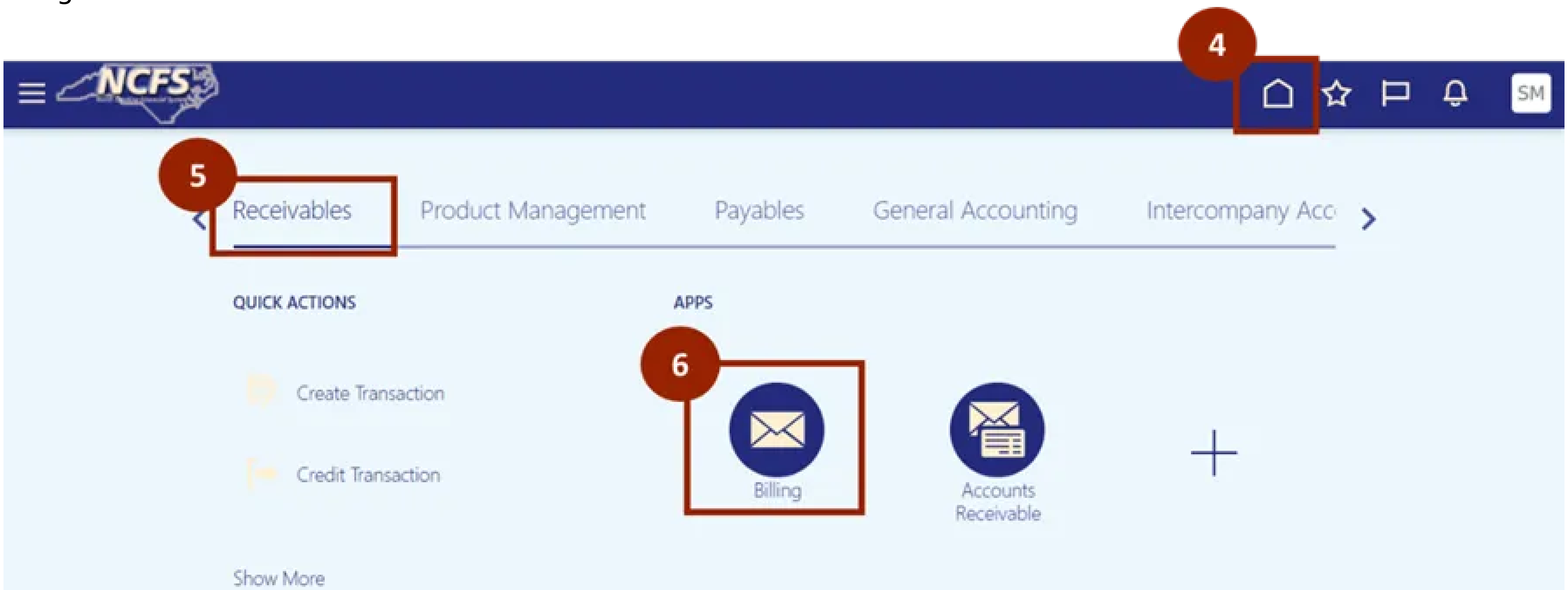
Password fields, then click **Sign-In**.

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.

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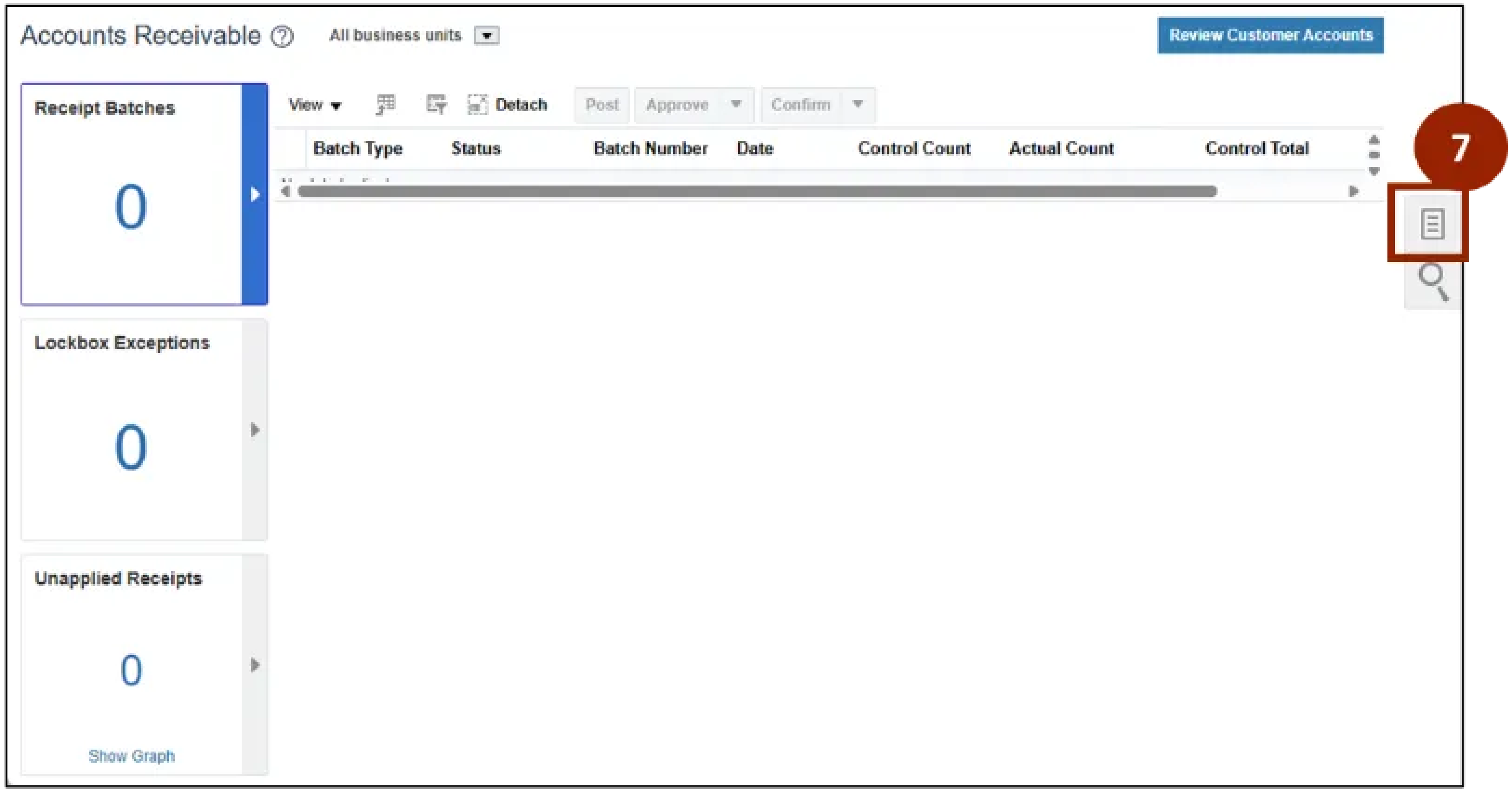
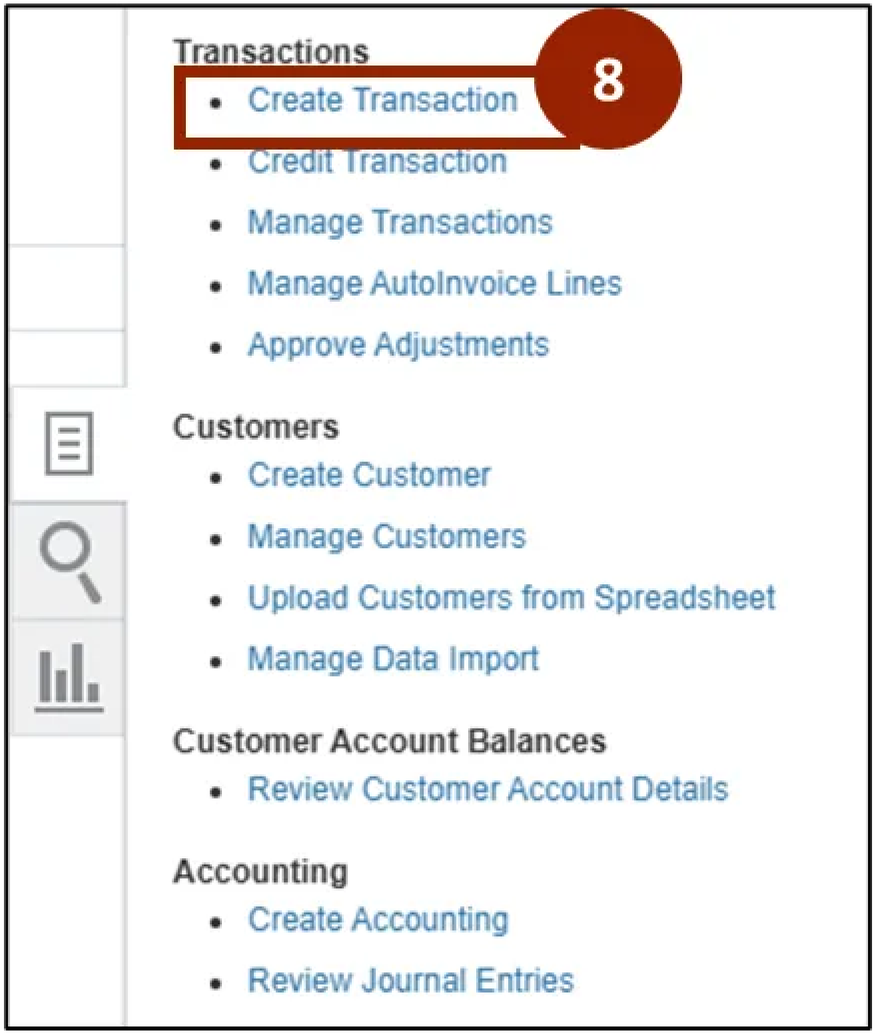


Step 8. Select **Create Transaction**.

Image



Step 9. In the **General Information** section, select the **Business Unit**, choose the **Transaction Source** and **Transaction Type**.

Step 10. Enter the **Bill-to-Name**, in the **Customer** section.

Step 11. In the **Invoice Lines** section, enter the Product or Service Name/Description, Unit of Measure, Quantity and Unit Price.

Step 12. Click **Save**.

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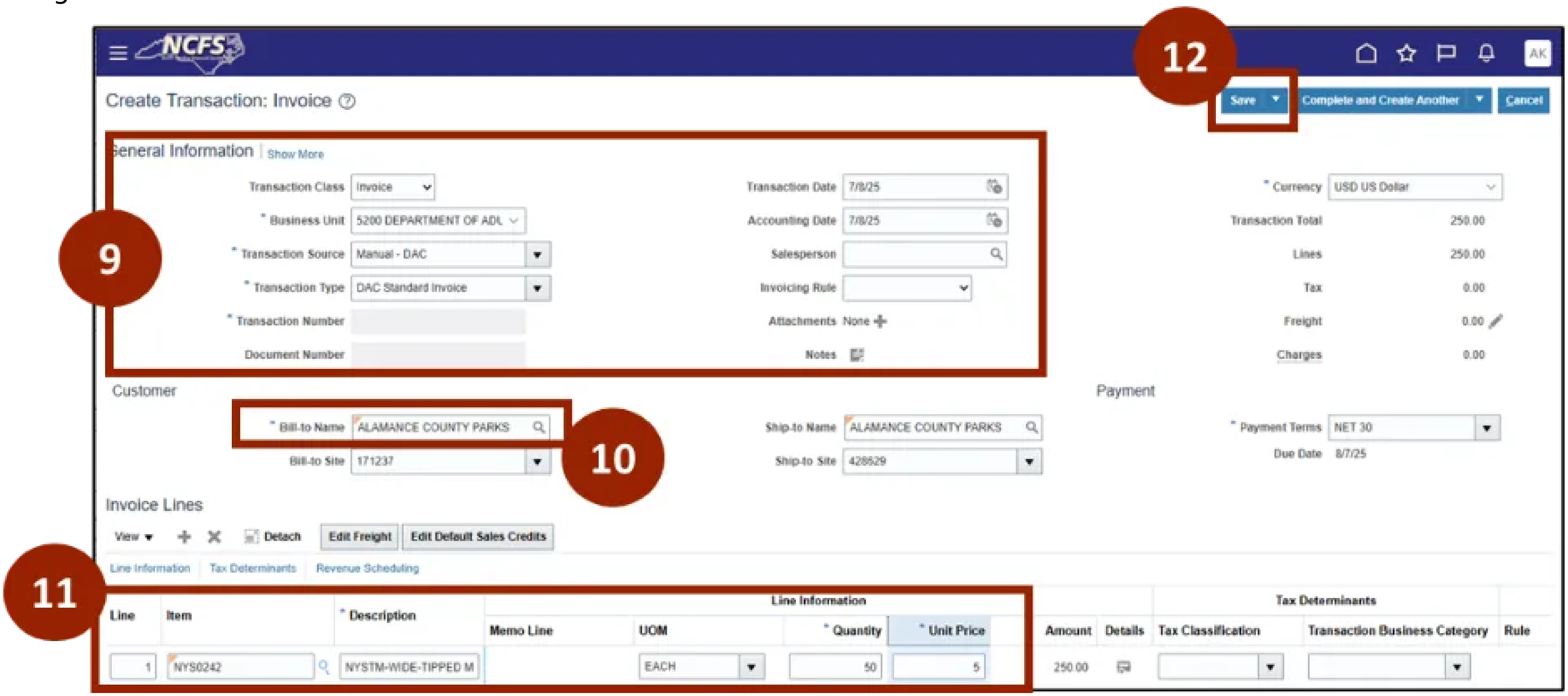
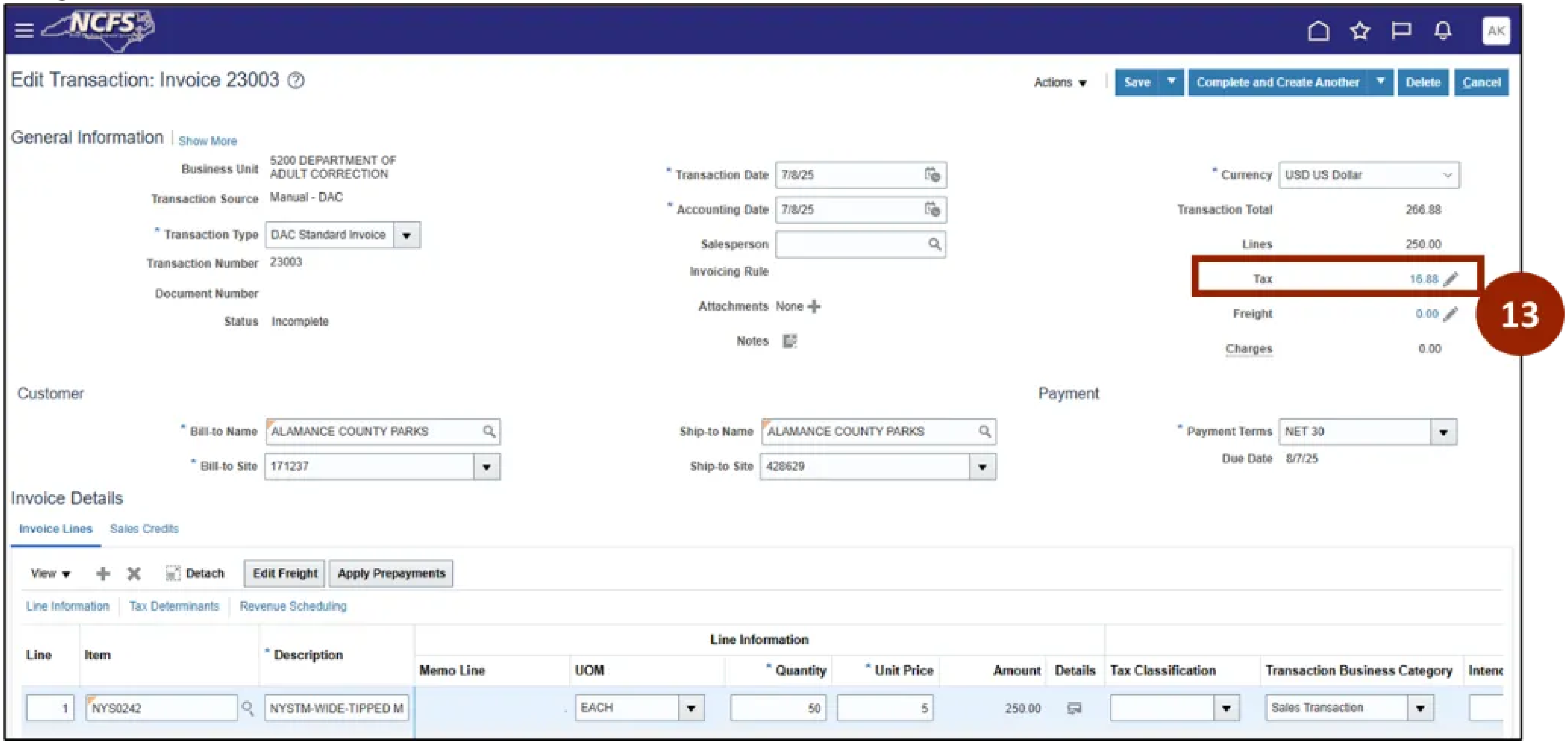


Step 13. Select the **Tax amount** hyperlink.

NOTE: NCFS automatically calculates applicable taxes based on customer location. The calculated tax appears in the **Tax Details or Tax Summary** section.

Image



Step 14. Click **Cancel**.

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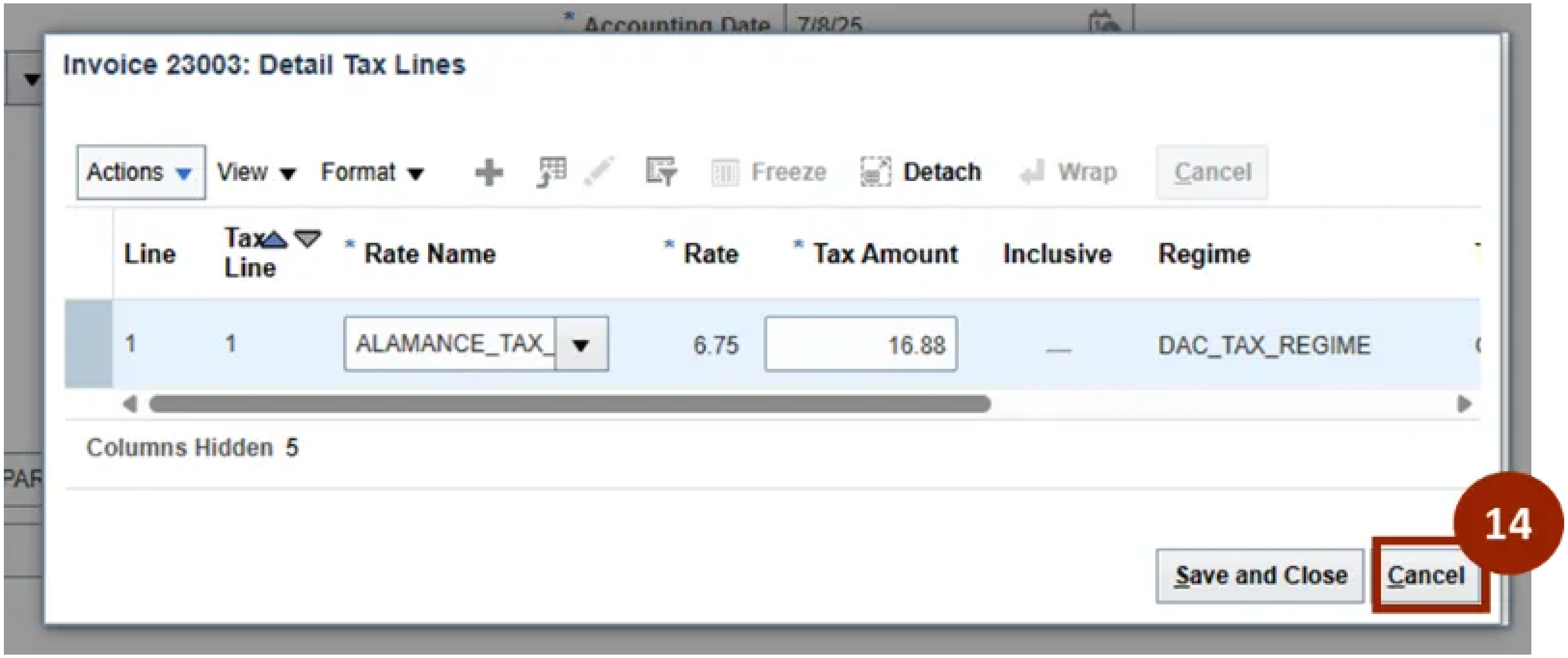
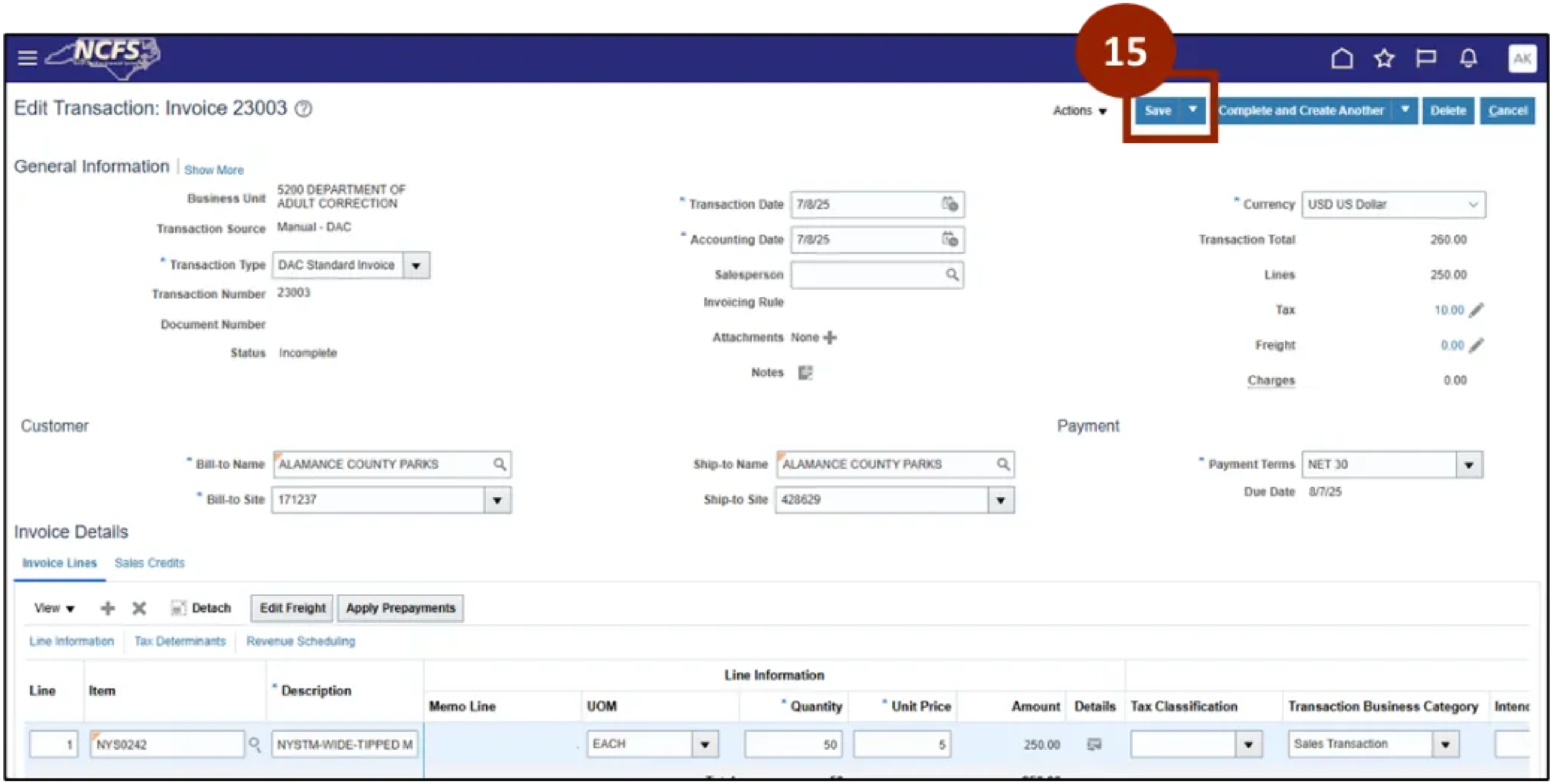


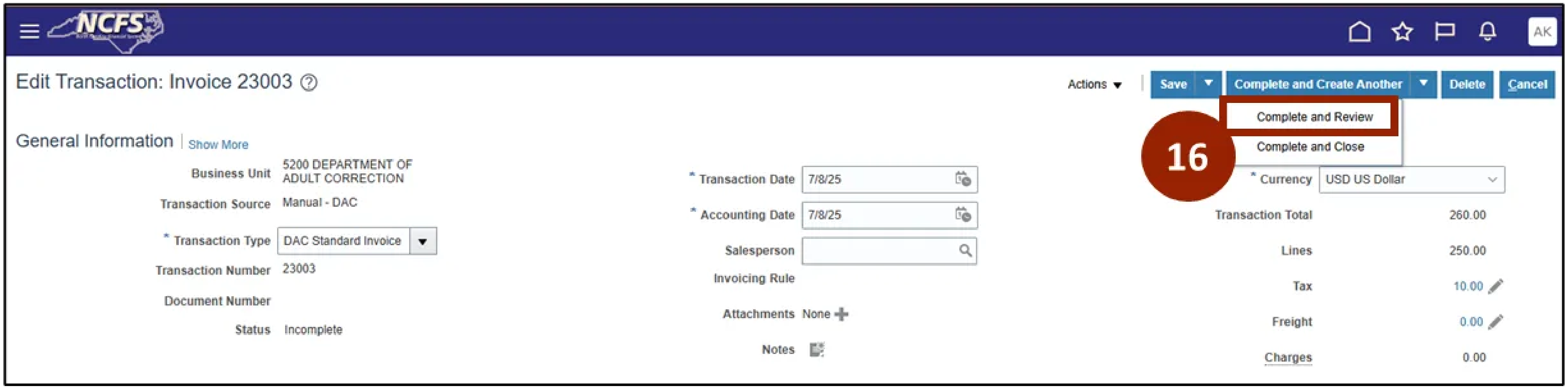
Step 15. Click **Save** to save the invoice draft.

Image



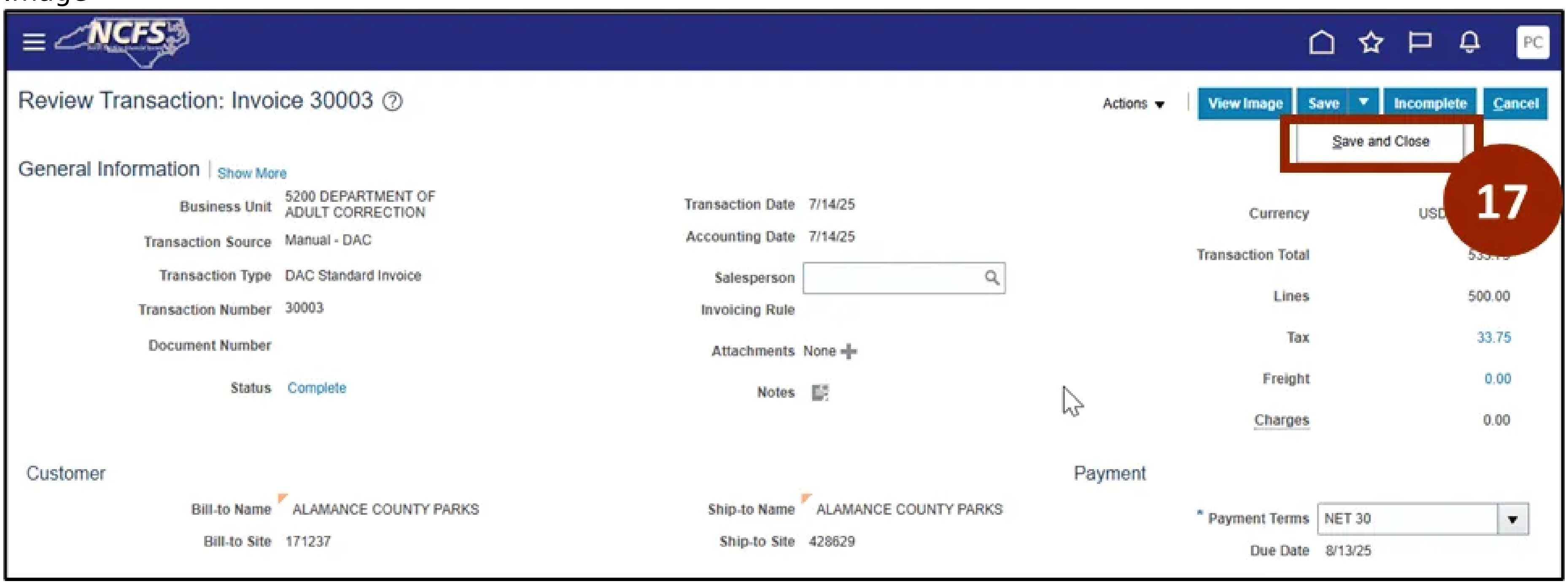
Step 16. Select drop-down and click **Complete and Review**.

Image



Step 17. Click the Save drop-down, then click **Save and Close**.

Image



Wrap-Up

NCFS users can reference the Calculate and Manage Tax using the steps above.

Additional Resources

- Instructor Led Training (ILT)
  - AR107: Manage Billing

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