

AP-04 Force Approve Invoices

Purpose

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

Introduction and Overview

This QRG covers the steps to force approve invoices in NCFS to bypass the approvals and immediately approve the invoices for further processing.

Force Approve Invoice in NCFS

To Force Approve an Invoice in NCFS, please follow the steps below. There are 9 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, click the **Payables** tab. Click the **Invoices** app.

Image

Good afternoon, AP Invoice Force Approval 1700!

Payables

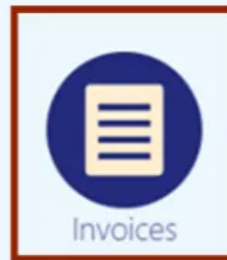
Tools

QUICK ACTIONS

APPS



Manage Invoices



Invoices



Step 3. Click the **Tasks** icon. Click **Manage Invoices** from the **Tasks** pane.

Image

NCFS

Invoices ?

Recent 24 Hours

0

Holds

0

Approval

0

Prepaid

0

View X [Icons] Detach Create Validate Cancel

Invoice Number Amount Supplier Supplier Site Validation Status A [Icons]

Invoices

- Create Invoice
- Create Invoice from Spreadsheet
- Create Recurring Invoices
- **Manage Invoices**
- Validate Invoices
- Initiate Approval Workflow
- Import Invoices
- Correct Import Errors

[Icons]

Step 4. On the **Manage Invoices** page, enter data into any one or more fields marked by ** to search the invoice.

In this example, we enter **AP003009**. Click the **Search** button.

Image

Done

Search: Invoice

Step 5. The search results are displayed, click **Invoice Number** to view the invoice details.

► **Search: Invoice**

Step 6. The invoice details are displayed, click the *Actions* drop-down. Select **Approval** and **Force Approve** from the *Actions* drop-down choice list.

Note: The invoice must be Validated before you can Force Approve.

Image

Search Results

AP003009

Invoice Details

Invoice Date

6/5/23

Invoice Type

Standard

Supplier or Party

EMC CORPORATION

Supplier Site

R.07PT.07

4246 COLLECTION CENTER DR, CHICAGO, IL-60693

Invoice Amount

1,000.00 USD

Applied Prepayments

0.00 USD

Unpaid Amount

1,000.00 USD

Holds

0

Notes

Validated

Actions

Save

Save and Close

Cancel

Edit

Check Funds

Validate

Request Override

Approval

Cancel Invoice

Post to Ledger

Account in Draft

Initiate

Withdraw

Hold

Force Approve

Resubmit

Lines

Holds and Approvals

Payments

Installments

Step 7. Scroll down to the *Approval and Notification* section and click the **Holds and Approval** tab to view the **Action** details.

Note: It may take some time for the status to change.

Image

Lines

Holds and Approvals

Payments

Installments

Approval and Notification History

View ▼



Detach

Workflow Type	Line	Action	Action Date	Approver	Reviewed Amount	Comments	Hold Reason
Invoice approval		Initiated	6/5/23 8:00 AM	Training ...	1,000.00 USD		
Invoice approval		Assigned to	6/5/23 8:01 AM	Training ...			
Invoice approval		Automatic approved	6/5/23 8:01 AM	Workflo...	1,000.00 USD		
Invoice approval		Assigned to	6/5/23 8:01 AM	BASIRA...			
Invoice approval		Manually approved	6/12/23 7:36 AM	Training ...	1,000.00 USD		

Step 8. Scroll up to the *Invoice Details* section and click the **Save and Close** button. You are redirected to the **Search Results** page.

Image

Invoice Details

Invoice Date 6/5/23
Invoice Type Standard
Supplier or Party EMC CORPORATION
Supplier Site R.07PT.07
Address 4246 COLLECTION
CENTER DR, CHICAGO,
IL-60693

Invoice Amount 1,000.00 USD
Applied Prepayments 0.00 USD
Unpaid Amount 1,000.00 USD
Holds 0
Notes

Validated Actions ▼

Save

Save and Close

Cancel

Business Unit 0700 DEPARTMENT OF
THE STATE TREASURER
Payment Business Unit 0700 DEPARTMENT OF
THE STATE TREASURER
Payment Terms Net 30
Payment Currency USD
Attachments Invoice Final Testing +

Step 9. The **Approval Status** is displayed as **Manually approved**.

Note: It may take some time for the status to change.

Image

► Search: Invoice

Advanced

Saved Search

All Invoices ▼

Actions ▼ View ▼       Detach Validate Pay in Full Approval ▼ Post ▼										
Invoice Number	Unpaid Amount	Invoice Amount	Applied Prepayments	Invoice Type	Notes	Validation Status	Approval Status	Holds	Details	
AP003009	1,000.00 USD	1,000.00 USD	0.00 USD	Standard		Validated	Manually approv...	0		

Wrap-Up

Force Approval of an Invoice in NCFS using the steps above.

Additional Resources

- Web Based Training (WBT)
 - [AP102: AP Approvals](#)

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