AP-16 Release Holds for Invoices

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of Release Holds for Invoices in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers how to release holds for invoices in NCFS which are applied for holds that needs to be validated.

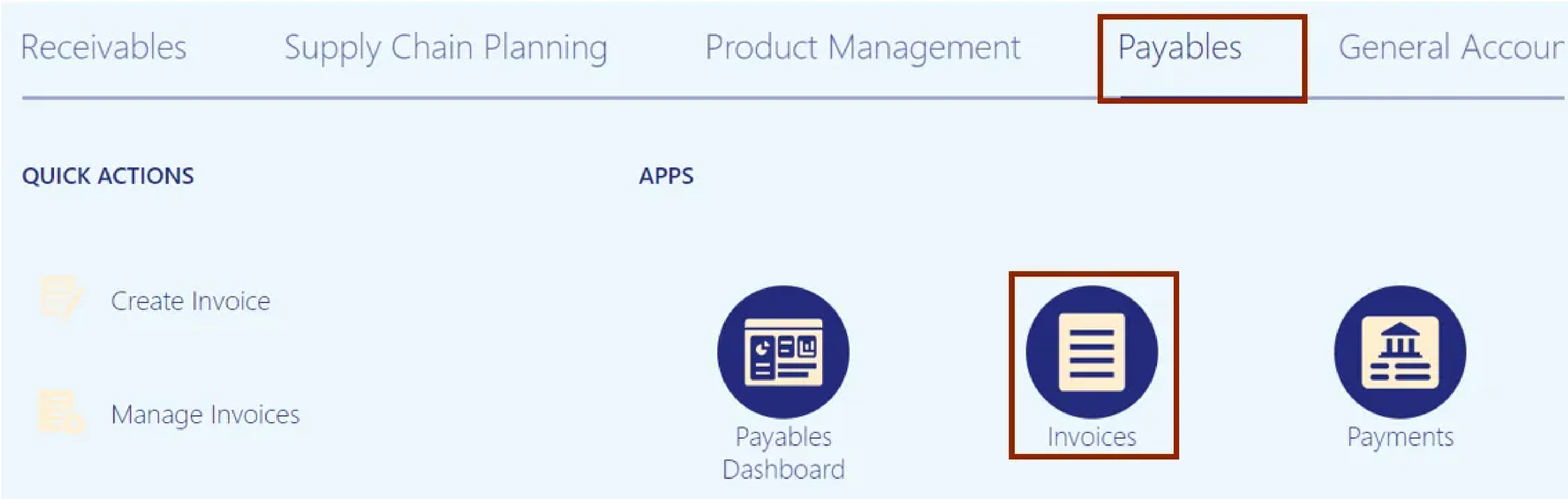
Release Holds for Invoices

To release holds for invoices in NCFS, please follow the steps below. There are 11 steps to complete this process.

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

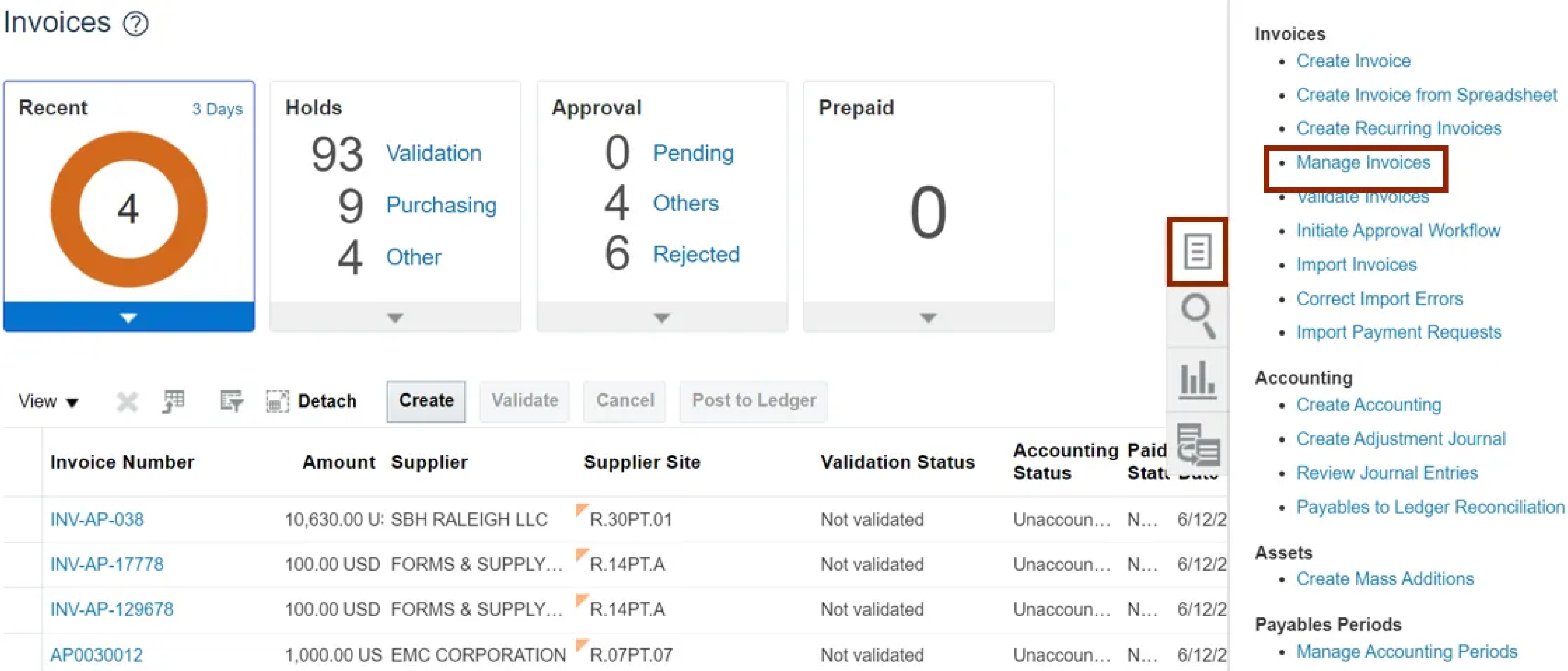
Step 2. On the **Home** page, click the **Payables** tab and then click the **Invoices** app.

Image



Step 3. On the **Invoices** dashboard, click the **Tasks** icon and click **Manage Invoices**.

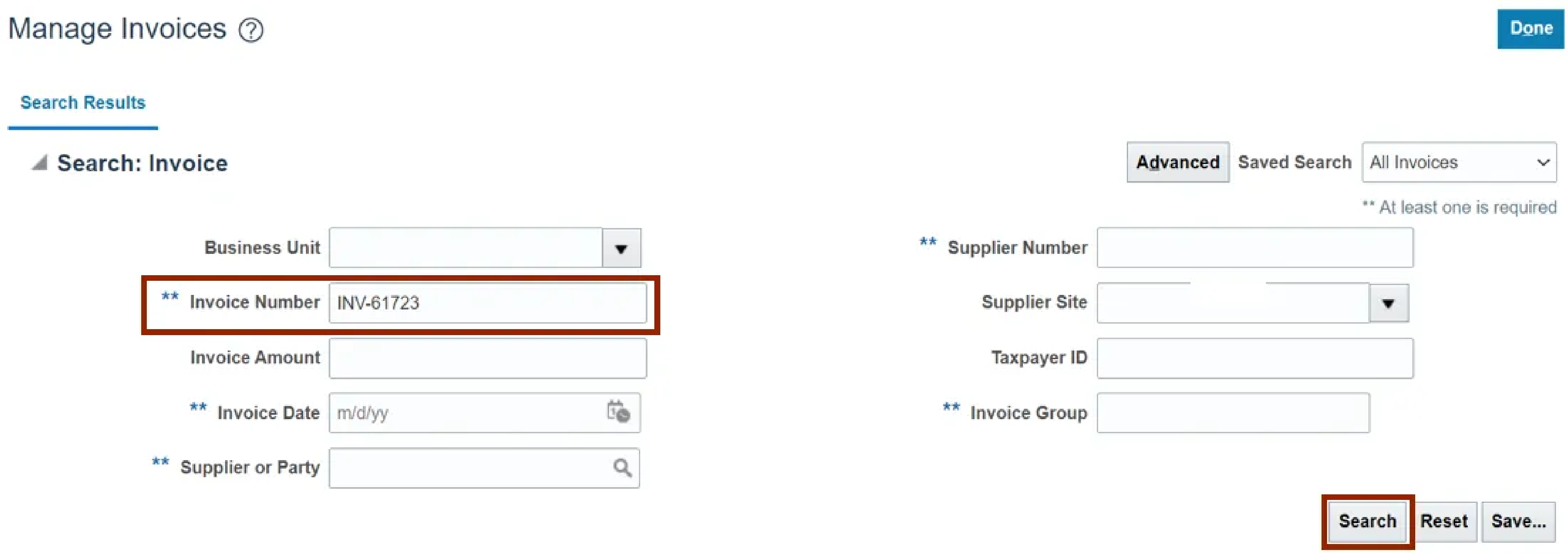
Image



Step 4. On the **Manage Invoices** page, enter the **Invoice number** in the ***Invoice Number*** field.

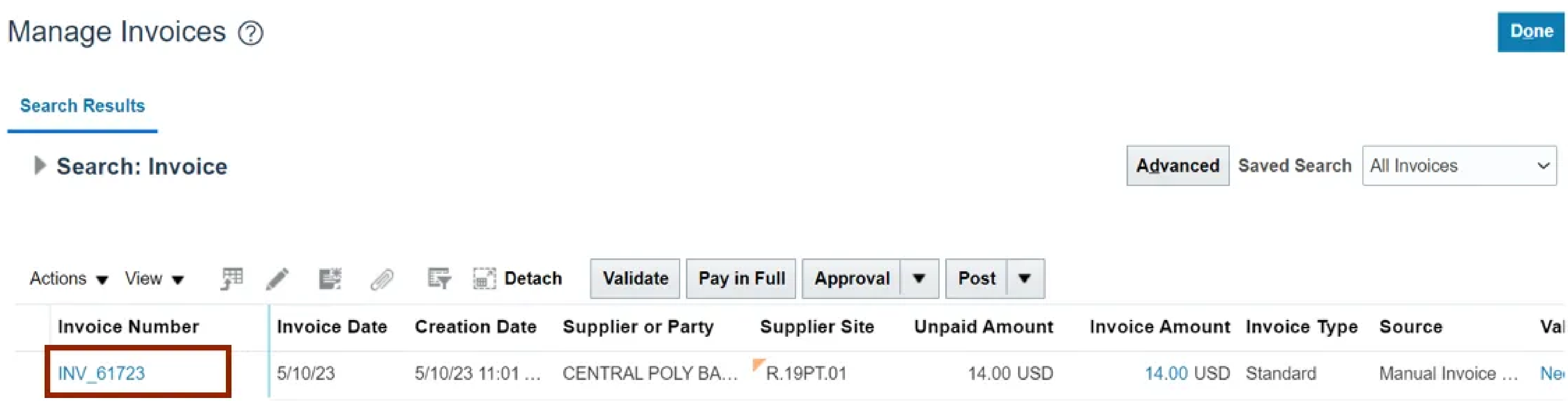
In this example, we enter **INV-61723**. Click the **Search** button.

Image



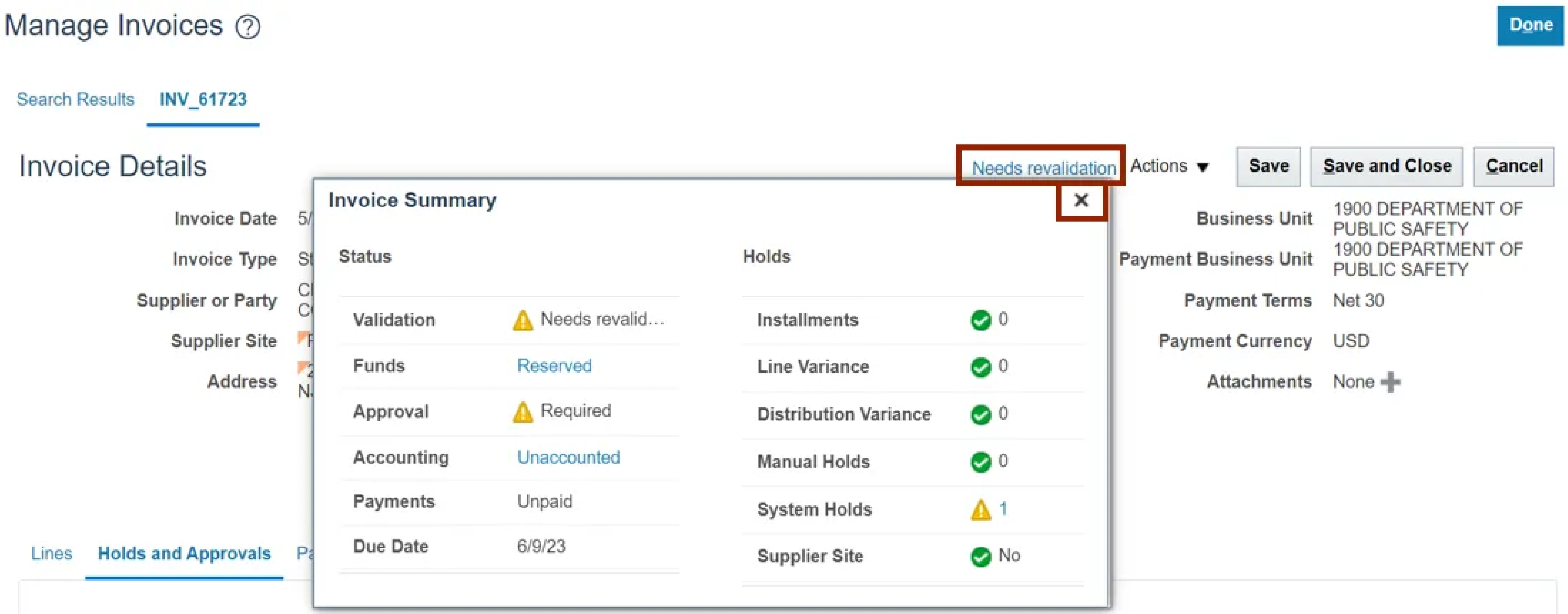
Step 5. Click the **Invoice Number** link.

Image



Step 6. Click the **Needs revalidation** link. The Invoice holds are shown in the *Invoice Summary* pop-up. Click the **X** icon.

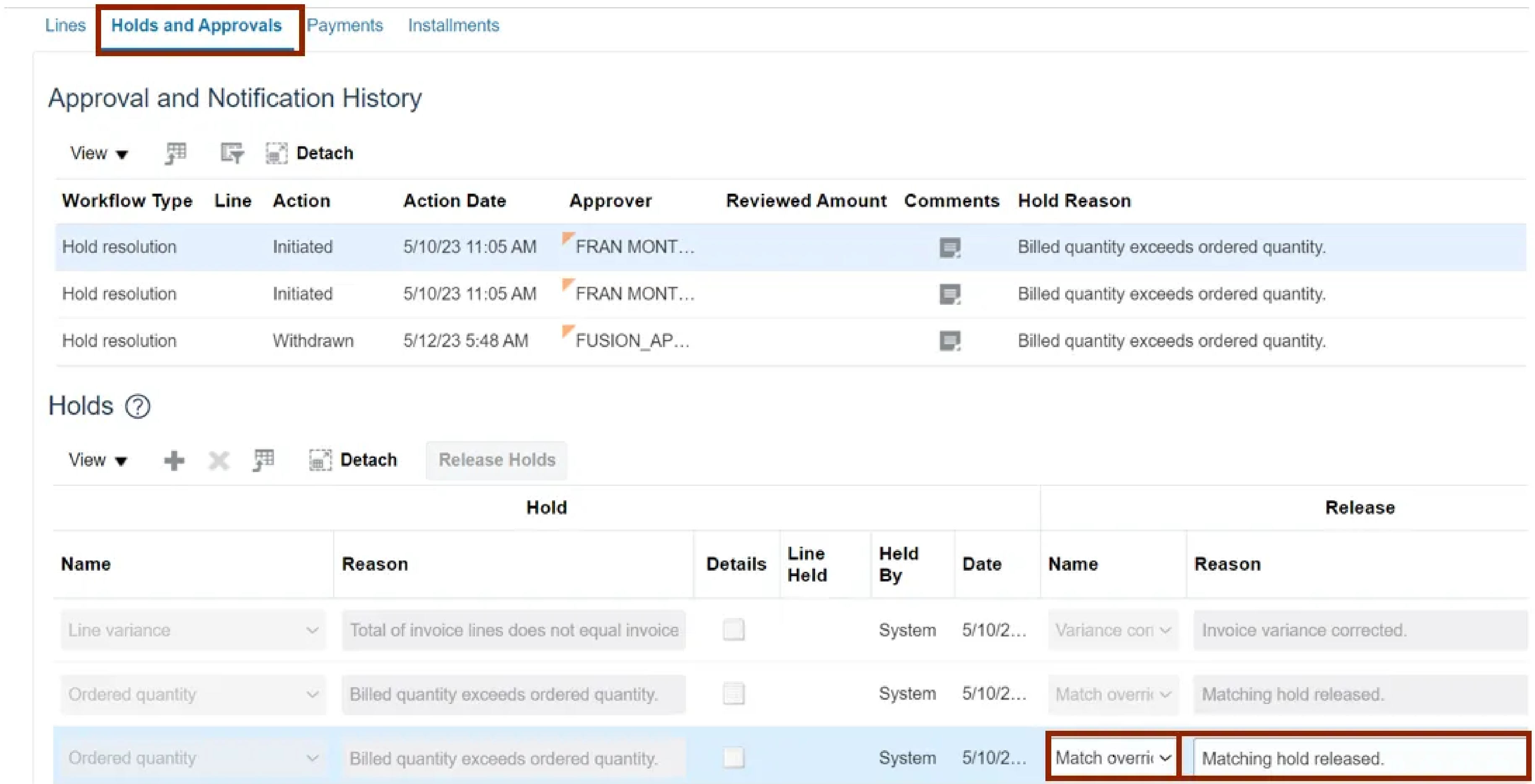
Image



Step 7. Scroll down and select the **Holds and Approvals** tab. Select the required **Release Hold Name** from the *Name* drop-down choice list.

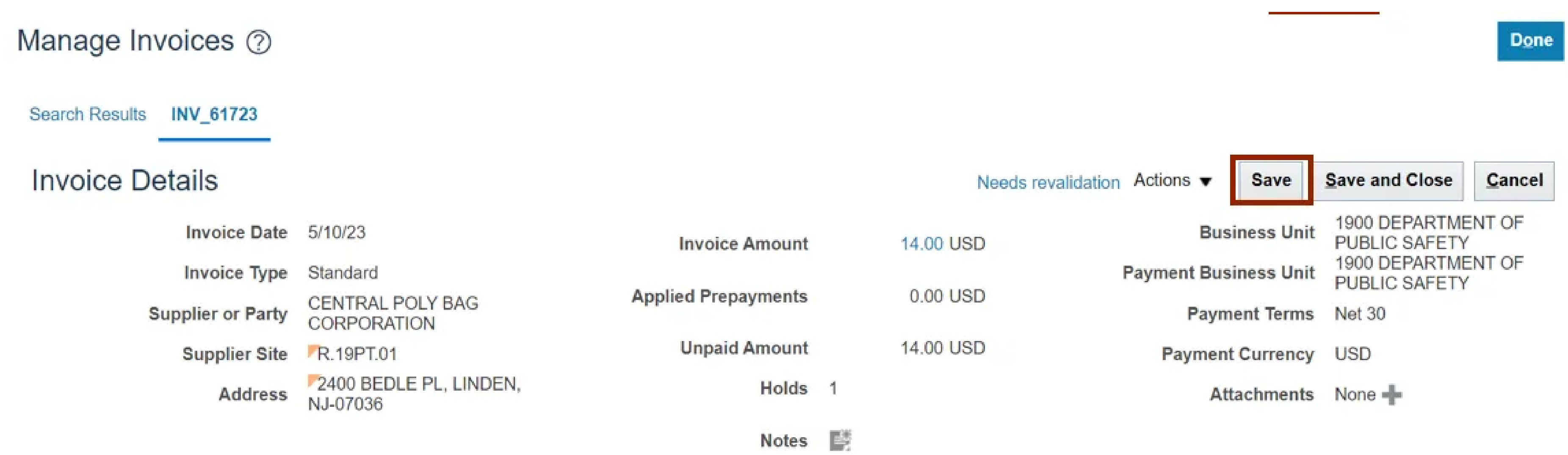
In this example, we choose **Match override**. Release reason is defaulted. The user can change it, if required.

Image



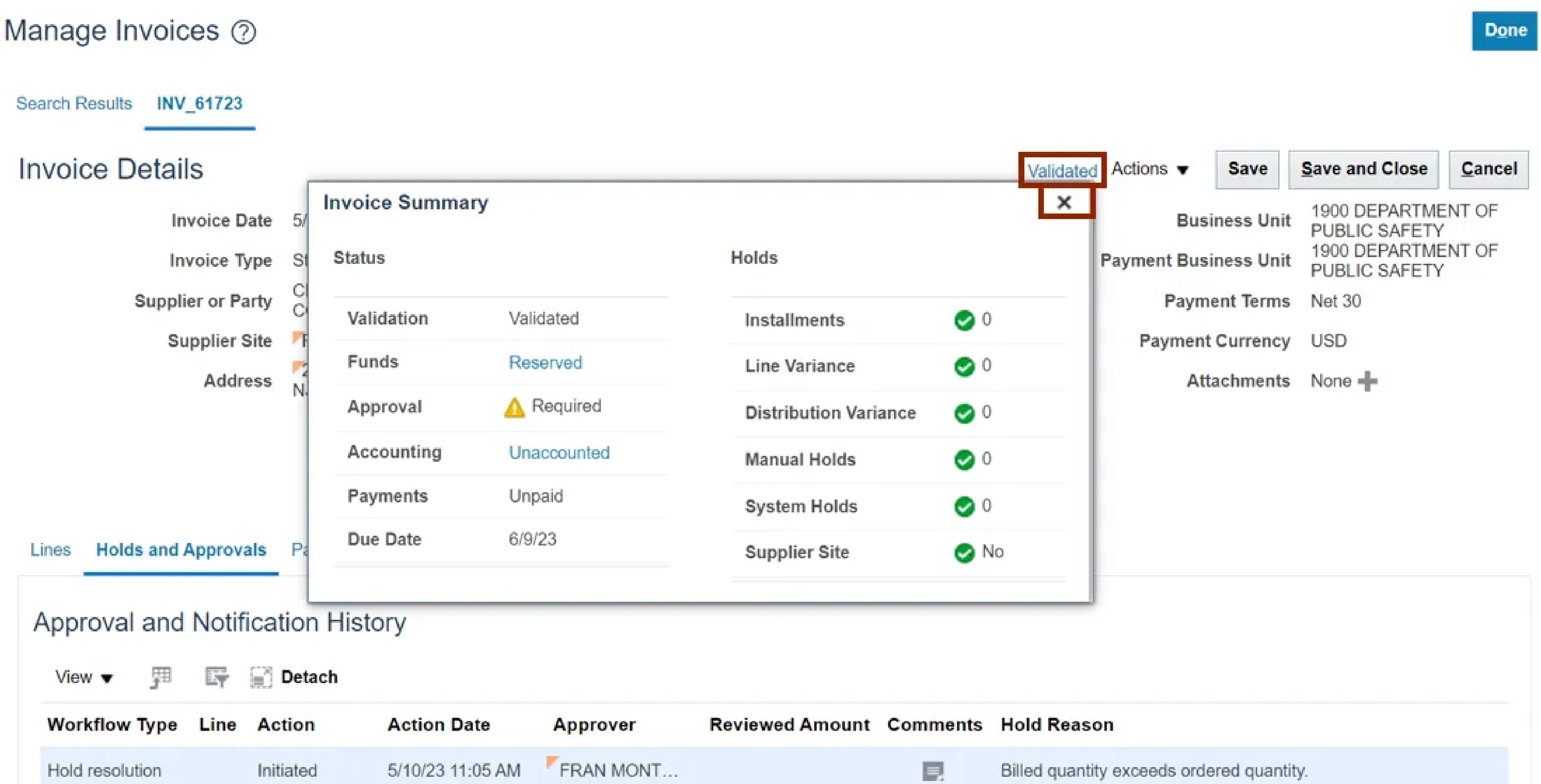
Step 8. Scroll up and click the **Save** button.

Image



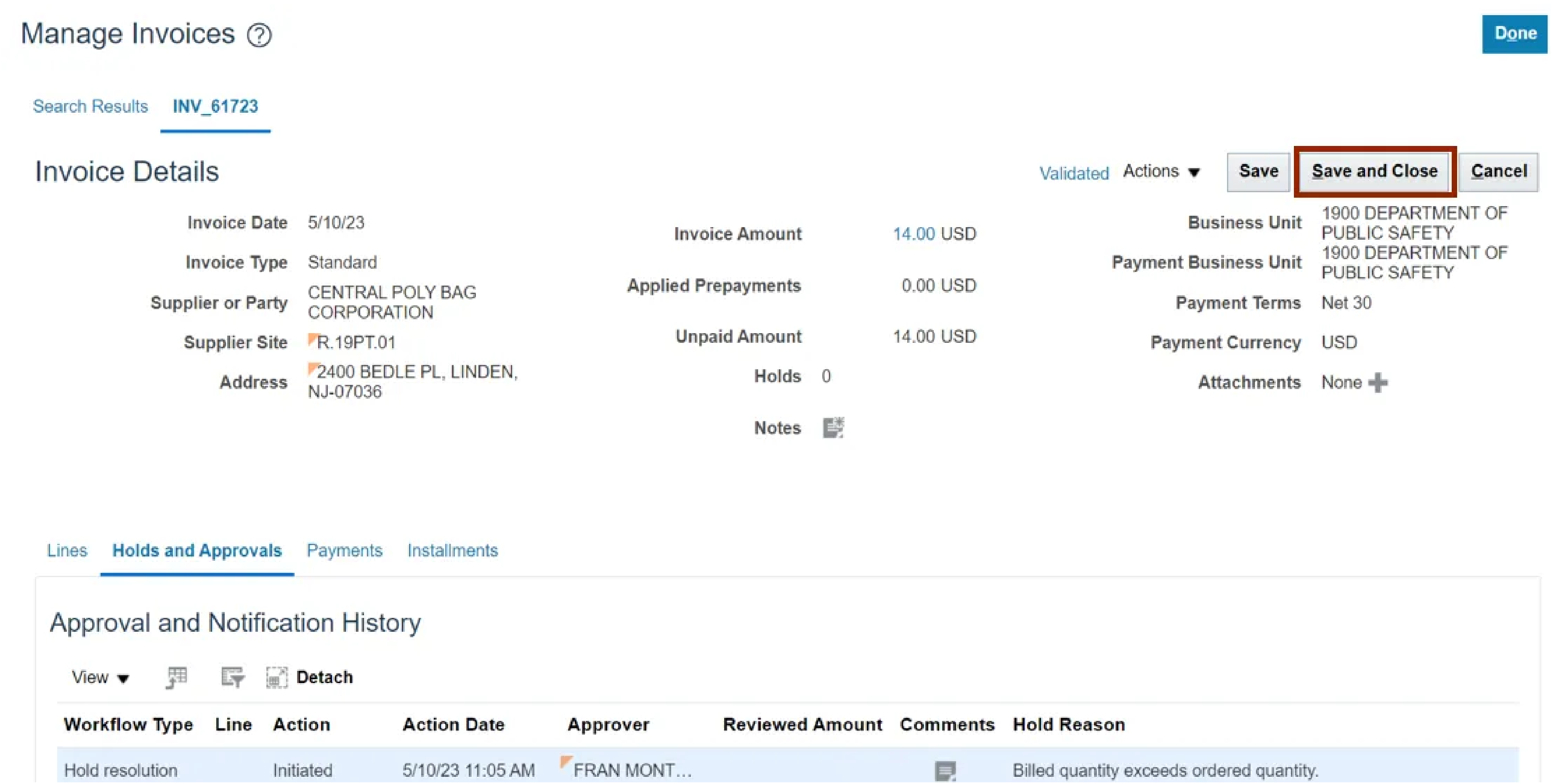
Step 9. Once all the invoice holds are released, **Needs revalidation** changes to **Validated**. Click the **Validated** link. You can view that the invoice has 0 holds. Click the **X** icon.

Image



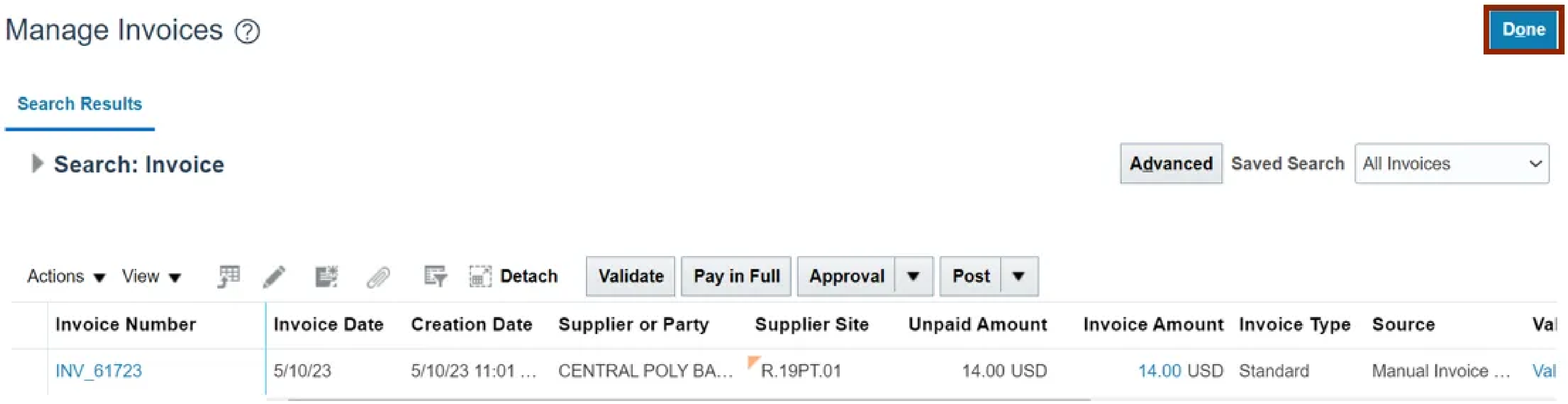
Step 10. Click the **Save and Close** button.

Image



Step 11. Click the **Done** button. This will redirect you to the **Manage Invoices** page.

Image



Wrap-Up

Release holds for invoices using the steps above, for any invoice which needs holds released manually.

Additional Resources

- Web-based Training (WBT)
  - AP108: Invoice Release Holds

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