

AP-37 Validate Invoices

Purpose

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

Introduction and Overview

This QRG covers the steps to mass validate invoices.

Note: The invoice needs to be validated before the approval process begins.

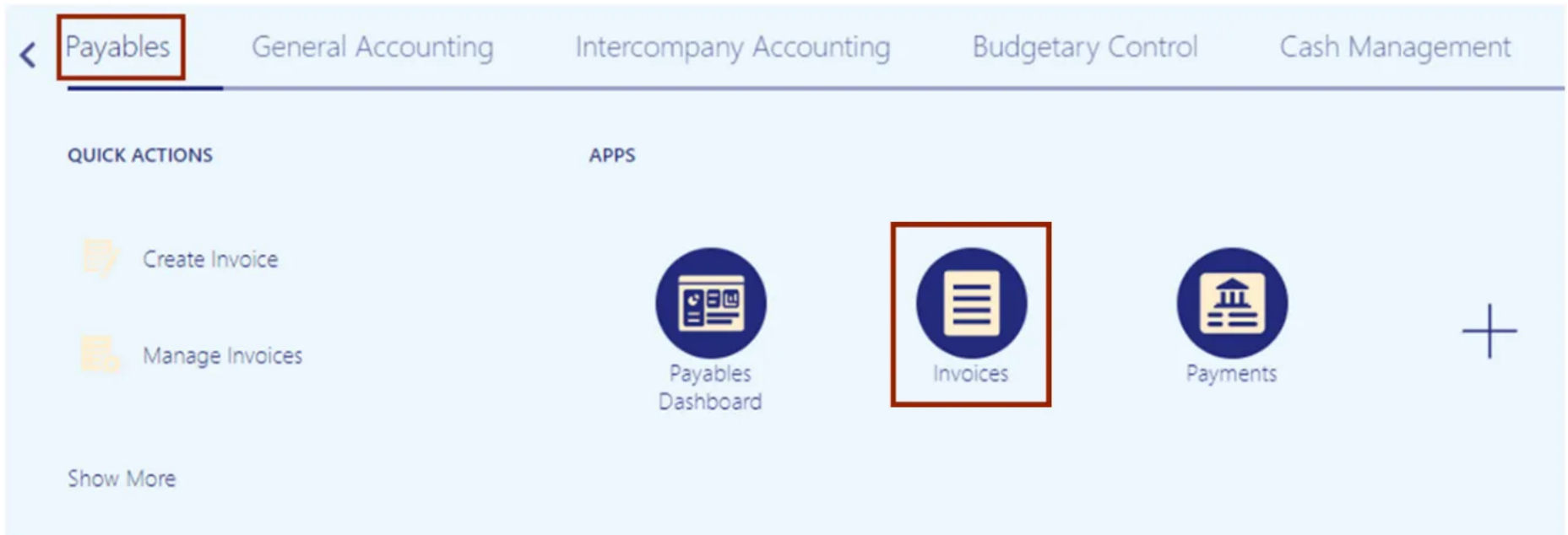
Validate Invoices

To validate 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.

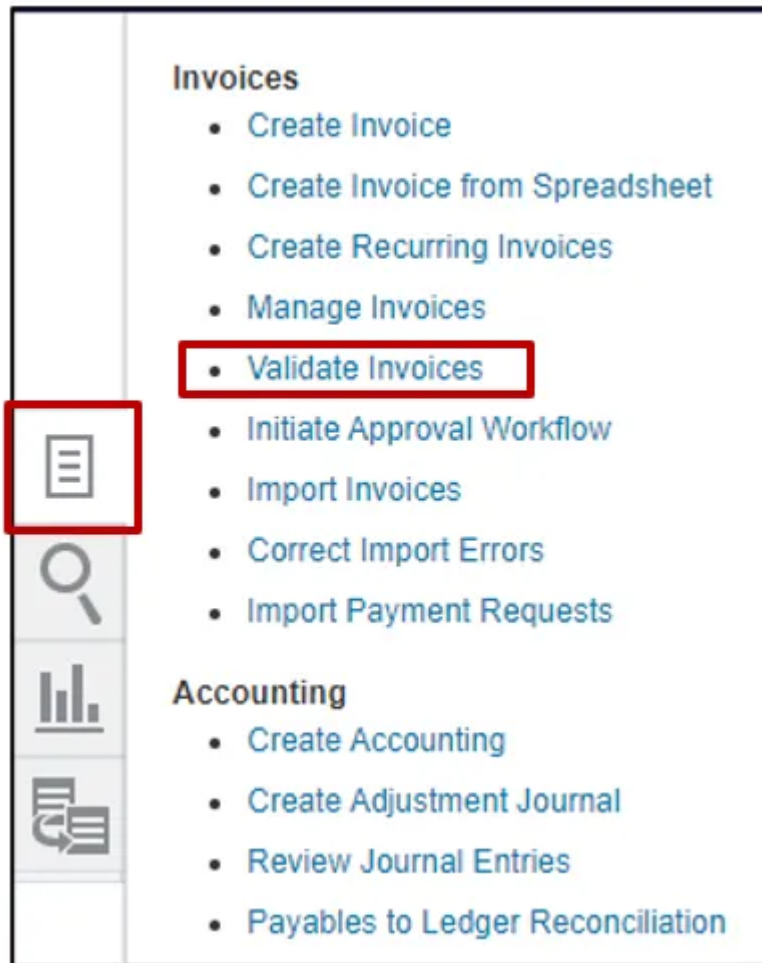
Step 2. Click the **Payables** tab. Click the **Invoices** app.

Image



Step 3. Click the **Tasks** icon. On the **Tasks** pane, click the **Validate Invoices**.

Image



Step 4. The **Submit Request** page opens. Fill in all the required parameters and click the **Submit** button.

Image

Submit Request

 This process will be queued up for submission at position 1

[Process Options](#) [Advanced](#) [Submit](#) [Cancel](#)

Name Validate Payables Invoices

Description Checks the matching, tax, period status, conver...

Schedule As soon as possible

☐ Notify me when this process ends

Submission Notes

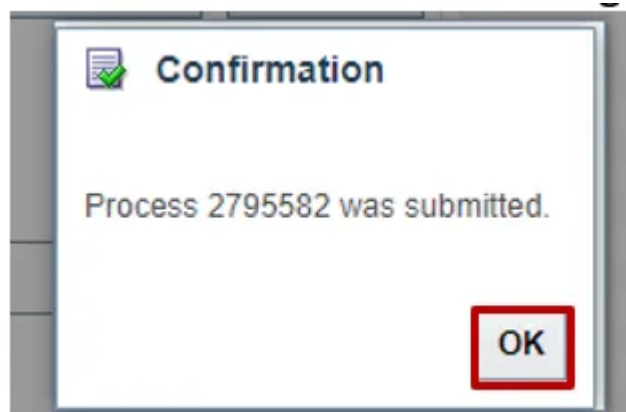
Basic Options

Parameters

Business Unit	0600 DEPARTMENT OF PUBLIC
* Ledger	NC CASH US
* Option	All
Invoice Group	
From Invoice Date	m/d/yy
To Invoice Date	m/d/yy
Supplier or Party	
Pay Group	
Invoice Number	
Entered By	
Maximum Invoices Count	
Number of Parallel Processes	1

Step 5. Confirmation message will be displayed.

Image



Step 6. Click the **Cancel** button.

Image

[Submit Request](#)

 This process will be queued up for submission at position 1

Process Options

Advanced

Subject

Cancel

Name Validate Payables Invoices

Description Checks the matching, tax, period status, conver...

Schedule As soon as possible

☐ Notify me when this process ends

Submission Notes

Basic Options

Parameters

Business Unit	0000 DEPARTMENT OF PUBLIC	▼
* Ledger	NC CASH US	▼
* Option	All	▼
Invoice Group		▼
From Invoice Date	m/d/yy	
To Invoice Date	m/d/yy	
Supplier or Party		▼
Pay Group		▼
Invoice Number		▼
Entered By		▼
Maximum Invoices Count		
Number of Parallel Processes		1

Step 7. You will be redirected to the **Invoice Dashboard** page, click on the **Home** icon.

Image



Step 8. Navigate to **Tools** application and click on **Scheduled Processes**. This is the step to find out the status of the Validate Invoice program.

Image

Good afternoon, Training Super 1

< Expenses Procurement My Enterprise **Tools** Configuration Others

QUICK ACTIONS

- Manage Collaboration Messaging History
- AI Apps Administration

APPS



Set Preferences



Alerts Composer



Developer Connect



Worklist



Reports and Analytics



Scheduled Processes



Transaction Console



Collaboration Messaging



Step 9. The overview page is displayed and a list of all the processes are displayed. You can search for the process using the search criteria or scroll down and look for the process in the list.

Image

Overview ?

► Search

Search Results ?

View ☒ Flat List ☐ Hierarchy

Actions ▼ View ▼ **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log ↻

Name	Process ID	Status
Rebuild Learning Item Stop Word Index	2796967	Wait
Rebuild Learning Item Stop Word Index	2796966	Succeeded
Rebuild Learning Item Stop Word Index	2796965	Succeeded
ESS process to check Search Cloud Service availability	2796964	Wait

Step 10. Click the **Search** arrow and enter the search criteria. You can use several criteria like Name, Process ID or the Submission Time to inquire for the process status. The process name to search for is - **Validate Payables Invoices**, click on **Search** button.

Image

Overview ?

► Search

Name Payables

Process ID

Status ▼

Submission Time After 12/11/23 9:58 AM (UTC-05:00) New York - Eastern Time (ET)

Submission Notes Contains

Submitted By

Saved Search Last hour ▼

Search Reset Download Results

Step 11. A list of all the processes inquired on will be displayed with the status.

Image

Search Results ?

View ☒ Flat List ☐ Hierarchy

Actions ▾ View ▾		Schedule New Process	Resubmit	Put On Hold	Cancel Process	Release Process	View Log	↺
Name		Process ID		Status				
Validate Payables Invoices		2795636		Succeeded				
Validate Payables Invoices		2795582		Succeeded				

Wrap-Up

Validate Invoices using the process above.

Note: The invoice needs to be validated before the approval process begins.

Additional Resources

- Virtual Instructor-Led Training (vILT)
 - [AP101: Invoice Management](#)

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