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.

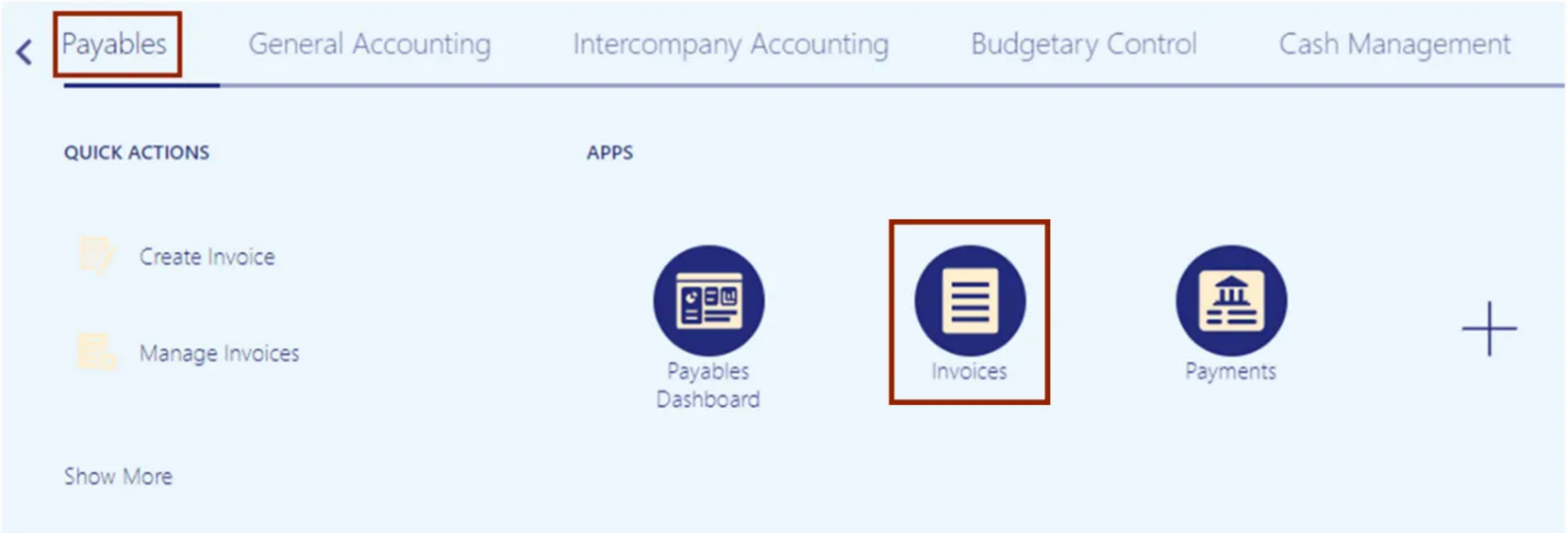
Validate Invoices

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.

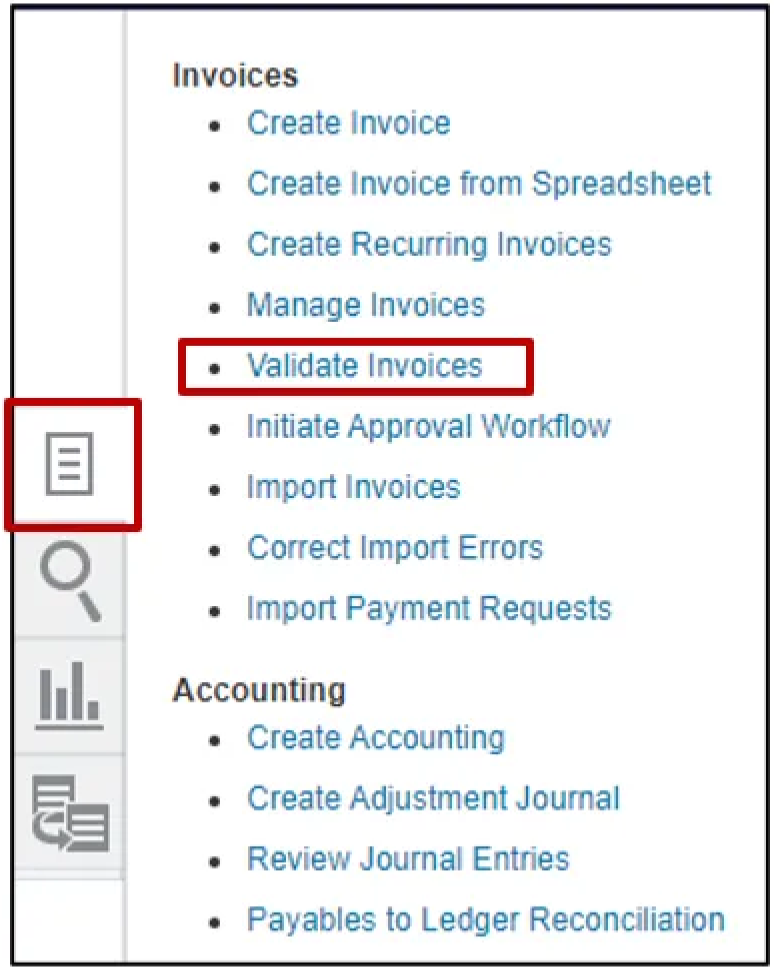
Step 2. Click the **Payables** tab. Click the **Invoices** app.

Image



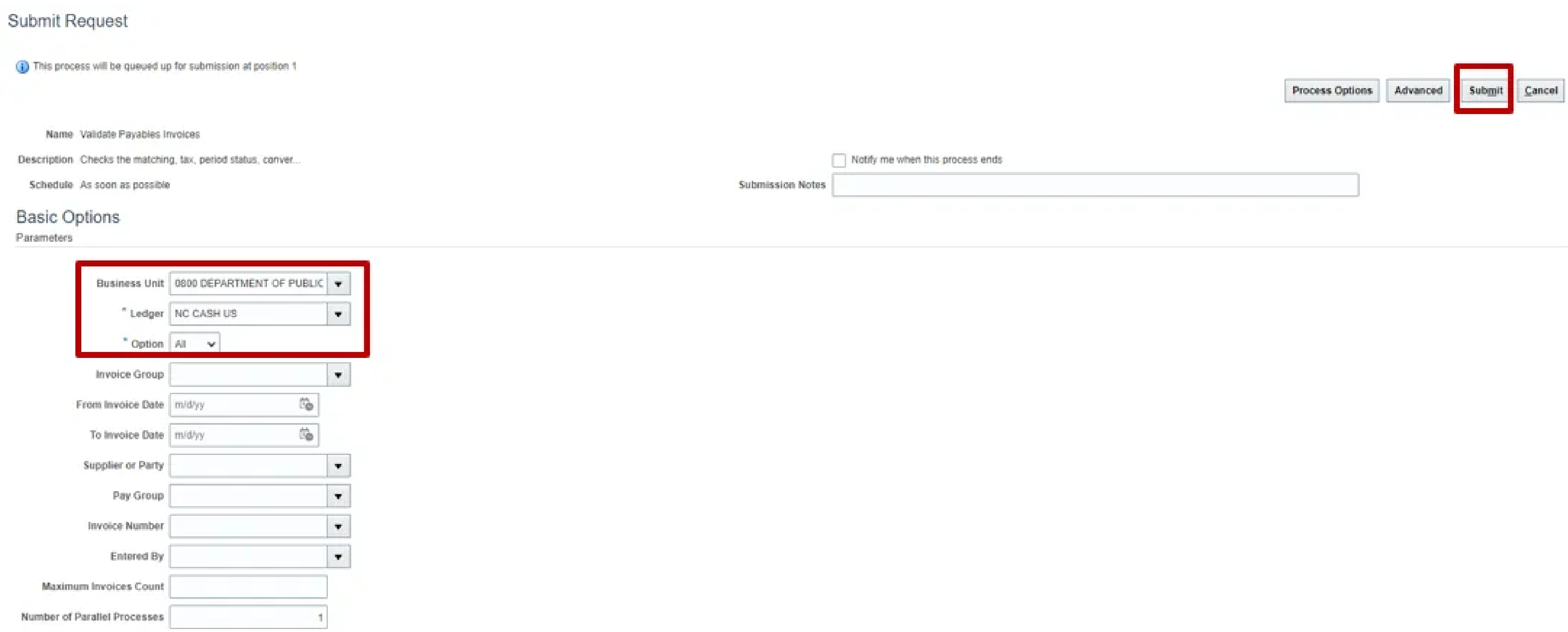
Step 3. Click the **Tasks** icon. On the **Tasks** pane, click the **Validate Invoices**.

Image



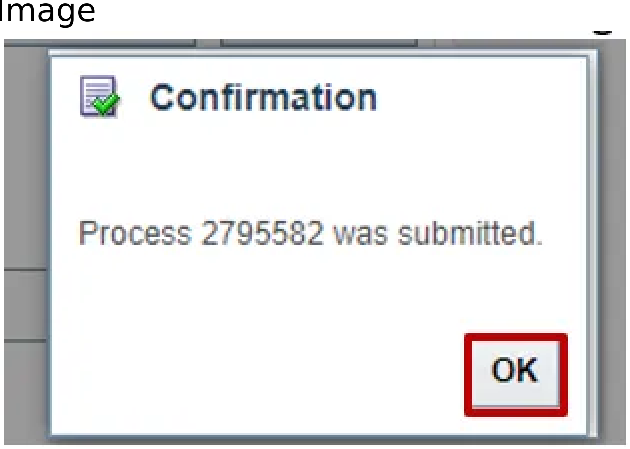
Step 4. The **Submit Request** page opens. Fill in all the required parameters and click the **Submit** button.

Image



Step 5. Confirmation message will be displayed.

Image



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

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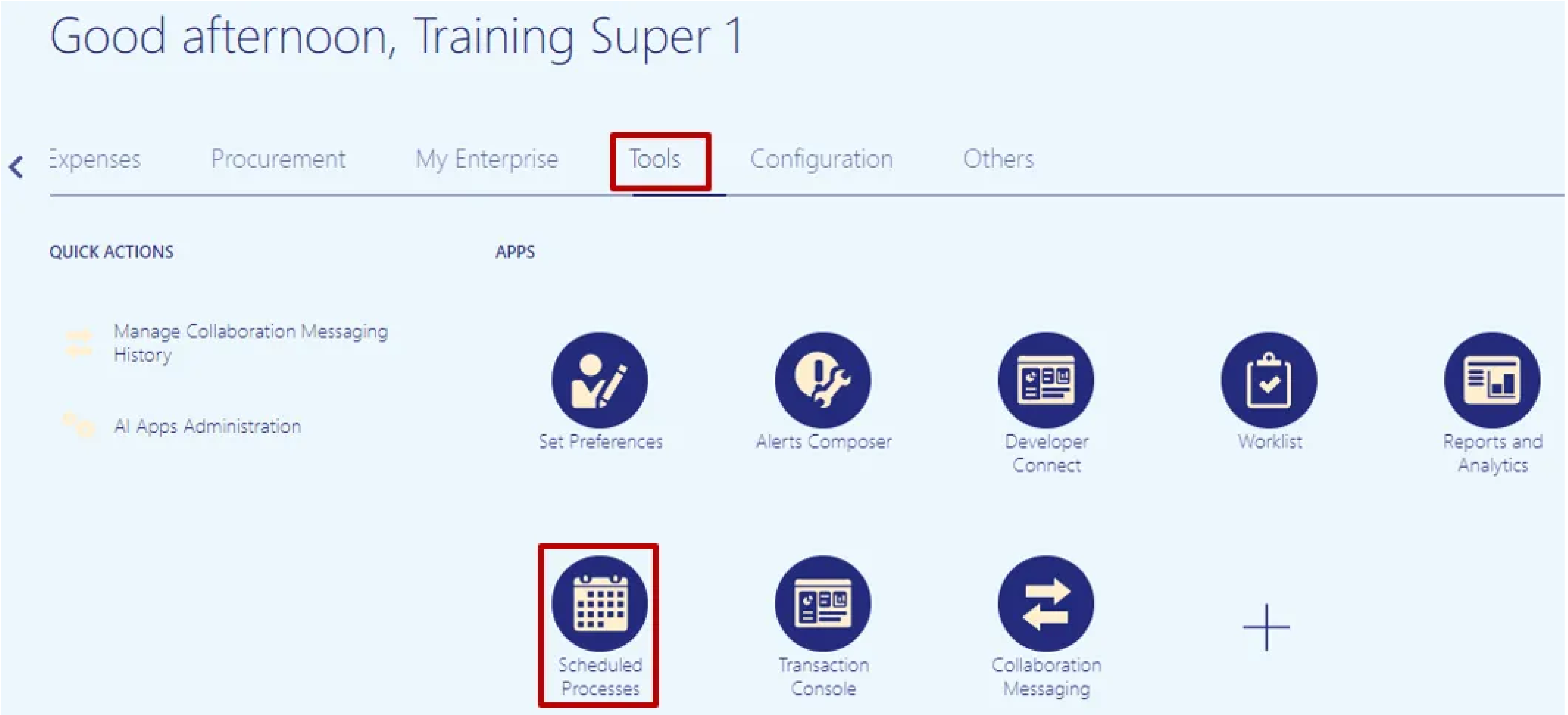
Step 7. You will be redirected to the **Invoice Dashboard** page, click on the **Home** icon.

Image

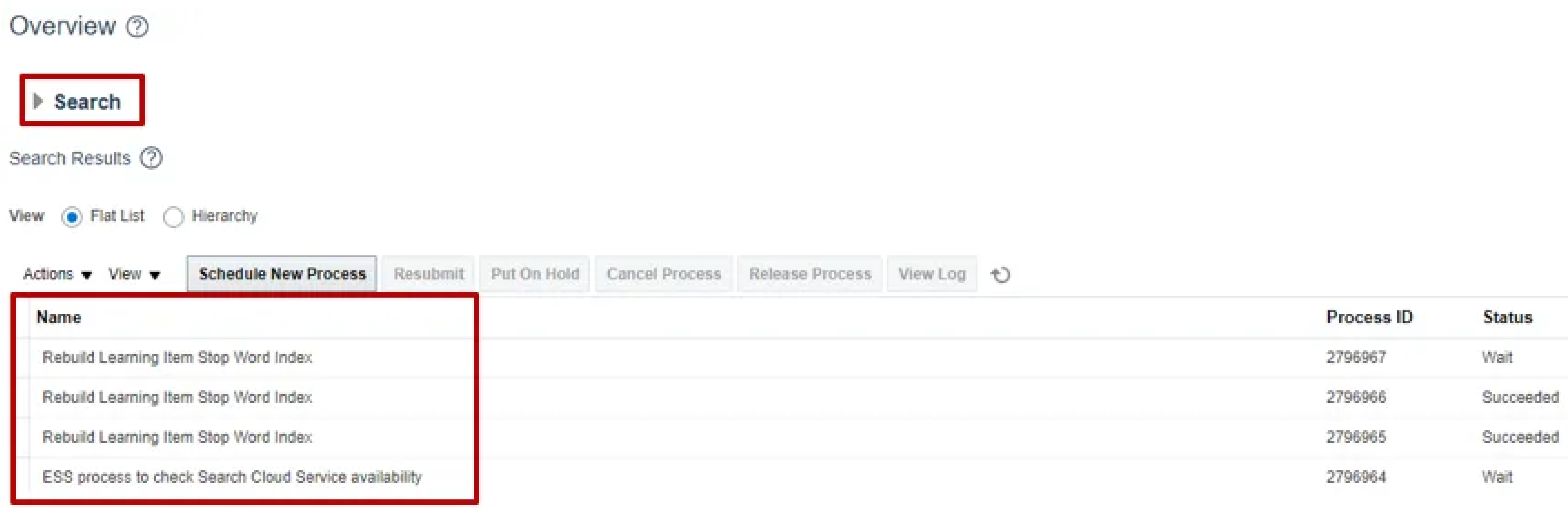
Step 8. Navigate to **Tools** application and click on **Scheduled Processes**. This is the step to find out the status of the Validate Invoice program.

Image



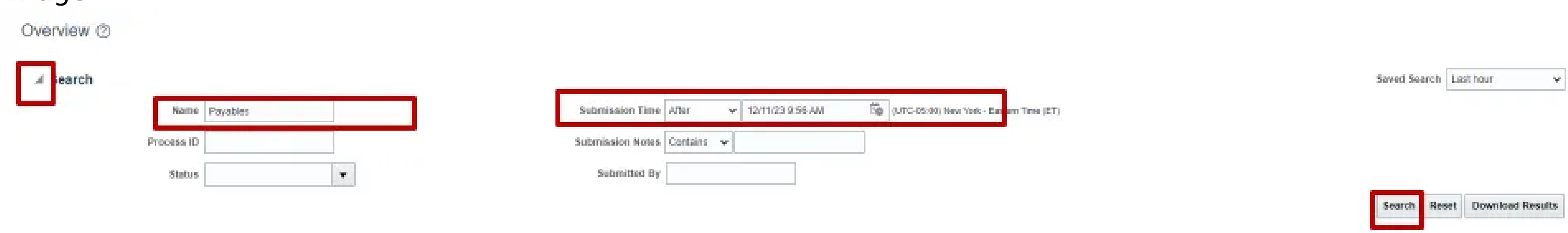
Step 9. The overview page is displayed and a list of all the processes are displayed. You can search for the process using the search criteria or scroll down and look for the process in the list.

Image



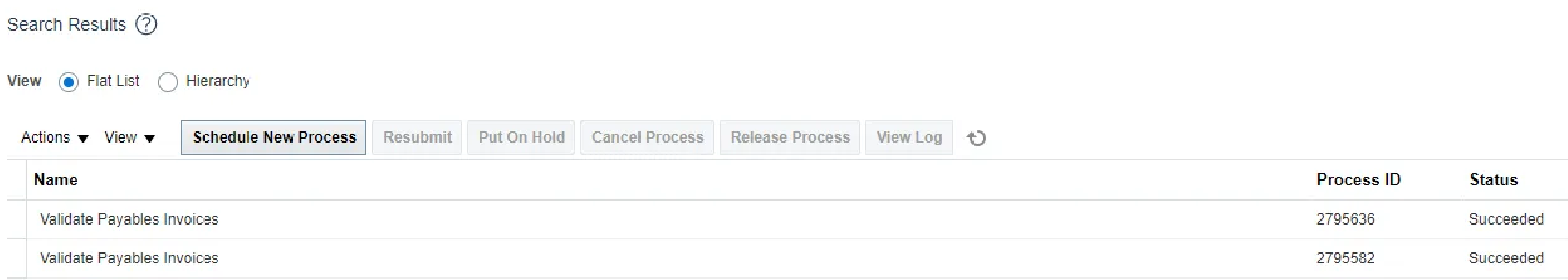
Step 10. Click the **Search** arrow and enter the search criteria. You can use several criteria like Name, Process ID or the Submission Time to inquire for the process status. The process name to search for is - **Validate Payables Invoices**, click on **Search** button.

Image



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

Image



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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