MANAGE AUTOINVOICE LINES

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QUICK REFERENCE GUIDE

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

Introduction and Overview

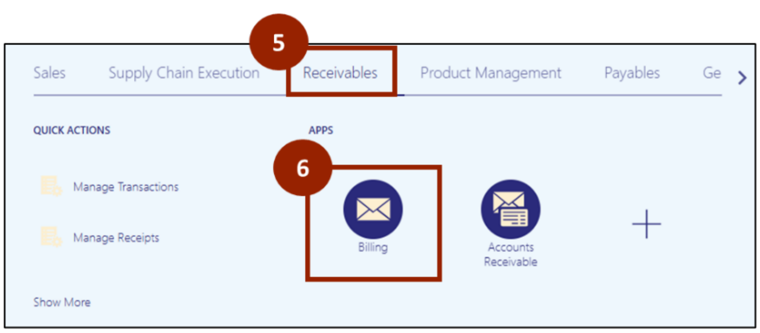
This QRG covers the process of ***Manage Autoinvoice Lines.*** This process provides information on identifying errors, correcting them, uploading the updated data, and submitting the sales order for successful invoice creation.

Manage Autoinvoice Lines

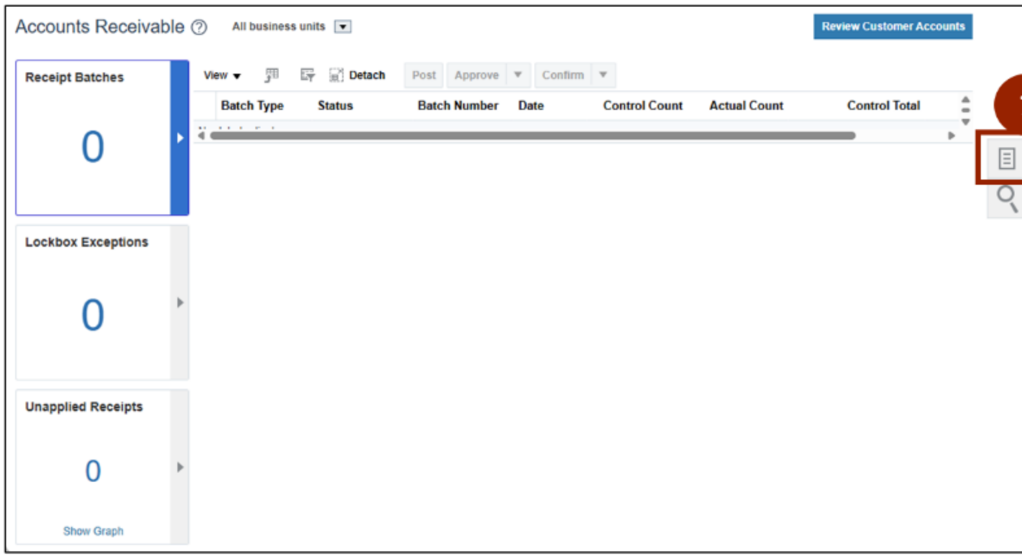
To approve expenses via the **notification bell** icon, please follow the steps below:

1. Log in to the NCFS portal using the **Company Single Sign-On (SSO)** button.
2. Enter your **dac.nc.gov** email address.
3. Click **Next**, then enter your **password**.

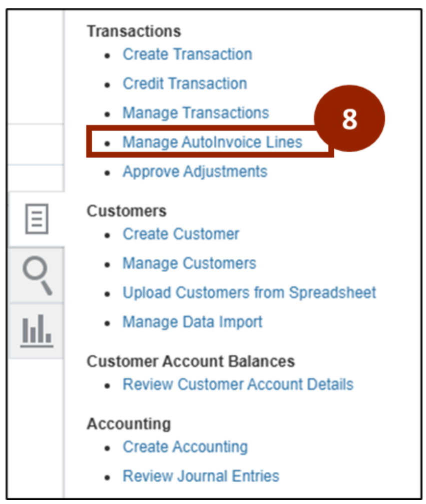
   NOTE: The system will automatically sign on using SSO and log in to NCFS. After the first login using SSO, future access may not require credentials. If SSO is not available, enter credentials manually within the *Username* and *Password* fields, then click **Sign-In**.
4. Navigate to the ***Home*** page.
5. Click on the **Receivables** tab.
6. Click on **Billing**.



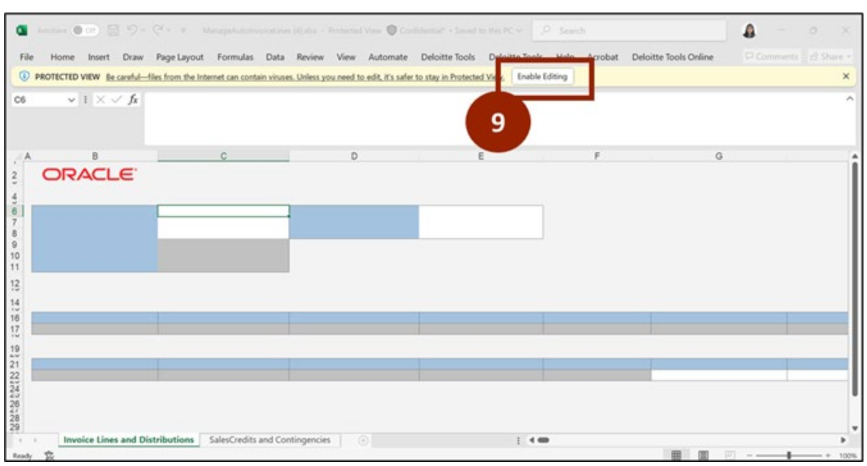
7. On the ***Billing*** page, click the **Task** icon.



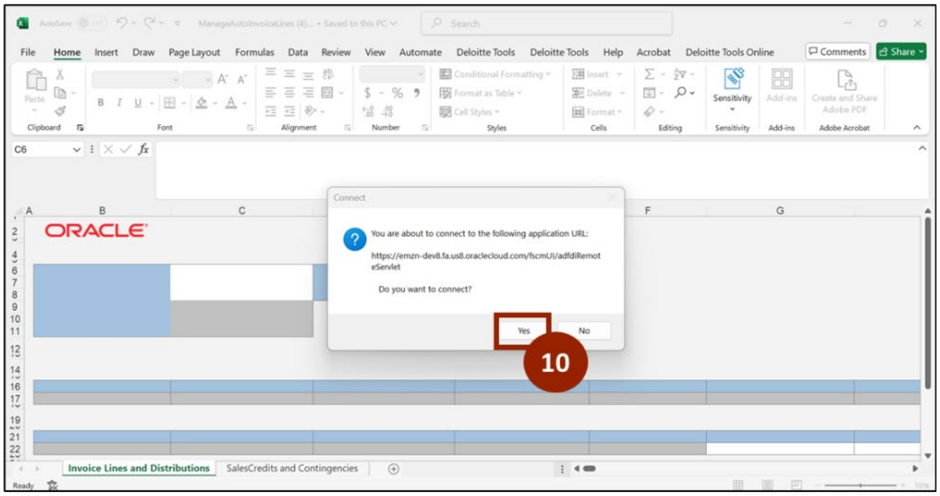
8. Select the Manage AutoInvoice Lines option.



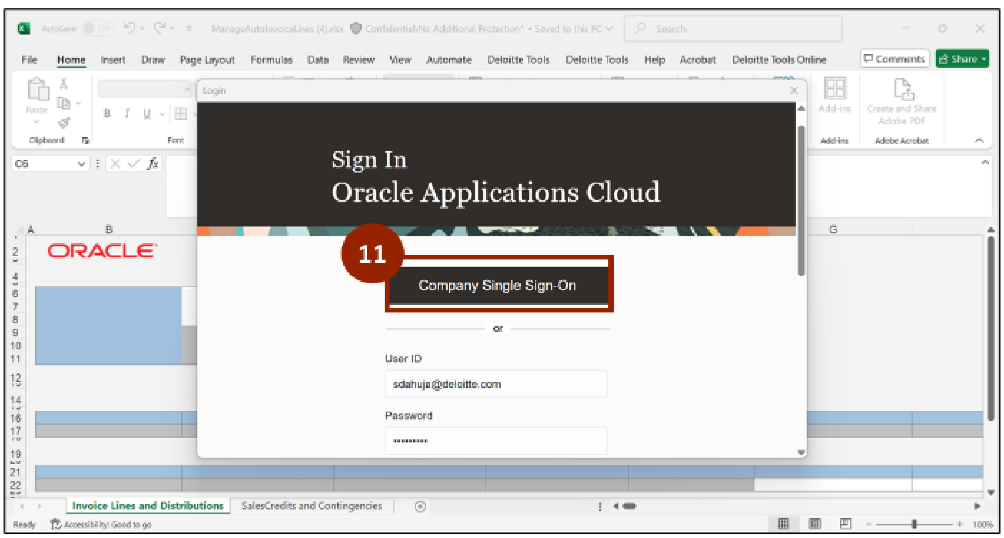
9. When the Excel workbook opens, select **Enable Editing** in the yellow security banner.



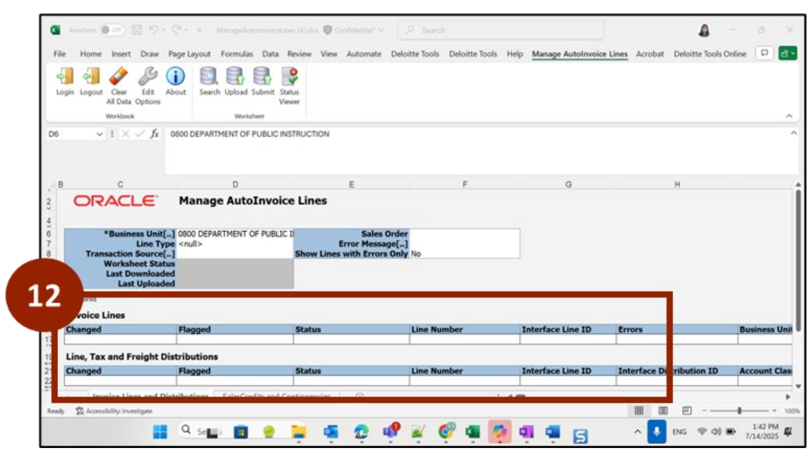
10. A security pop-up appears asking whether you want to access the specified application URL. Click **Yes.**



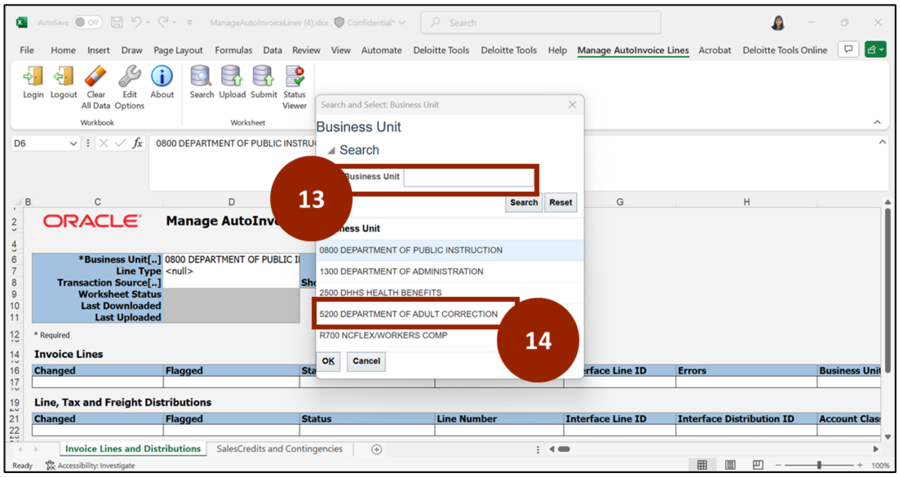
11. When the ***Oracle sign-on*** page appears, enter your **SSO username** and **password**, then click **Sign In**.



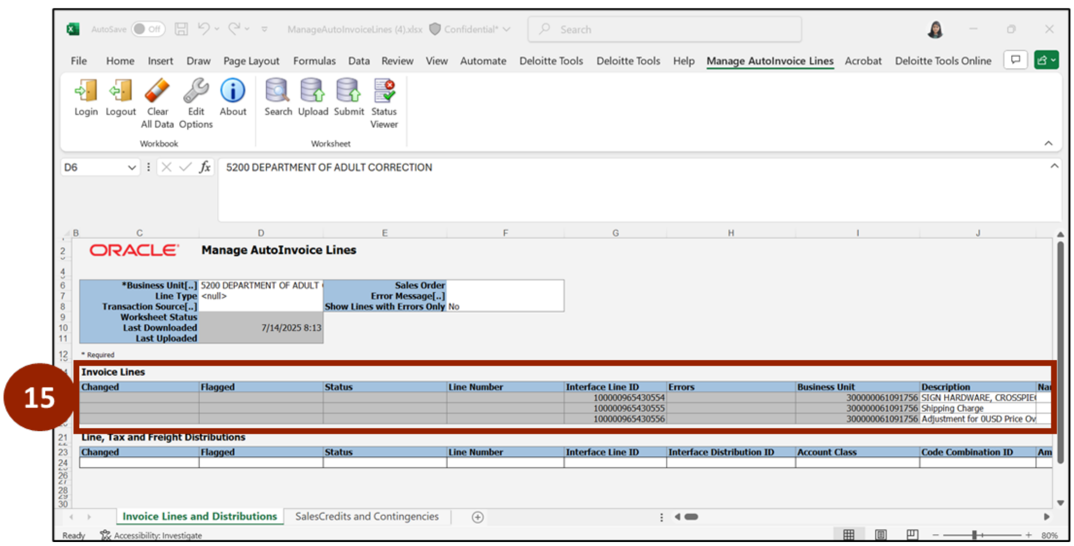
12. The spreadsheet opens, and displays the Invoice Lines, Lines, Tax, and Freight Distributions.



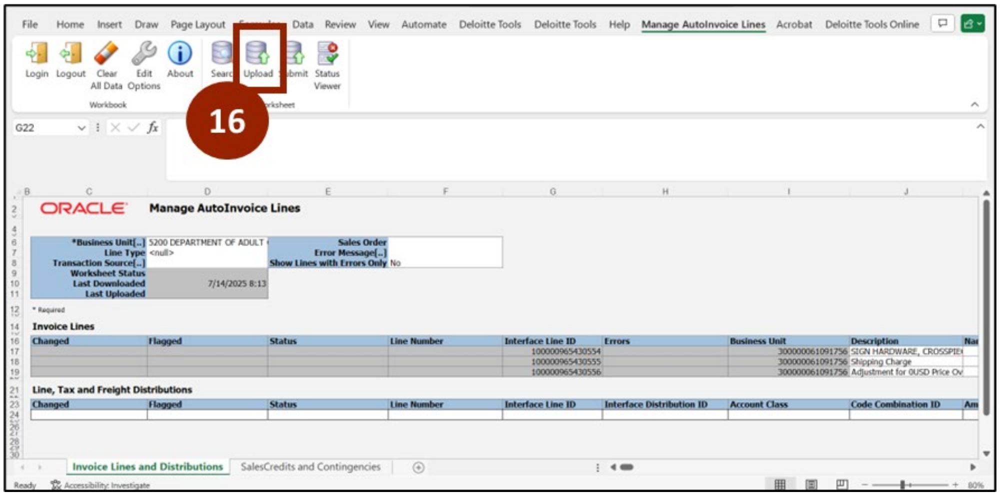
13. Select the **Business Unit** field.
14. From the drop-down, select **5200 – Department of Adult Correction** to display any error lines for the relevant sales order.



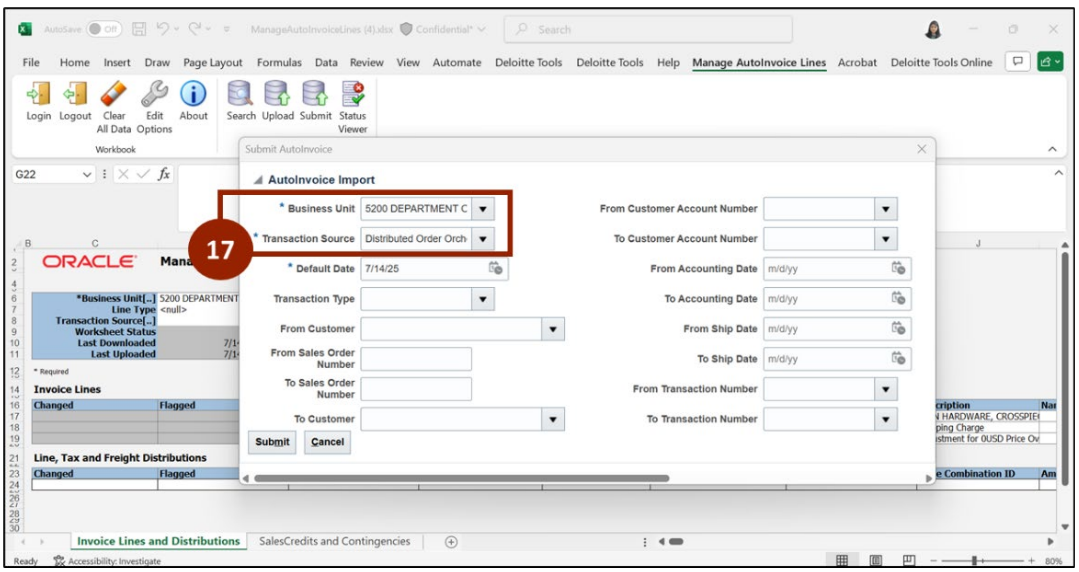
15. The sheet displays the errors that must be resolved before the sales order can be converted into an invoice.



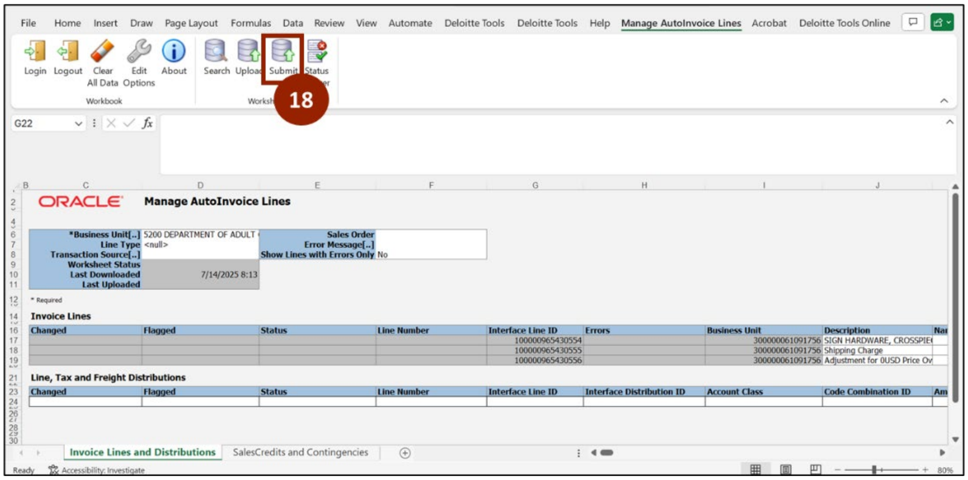
16. After updating the errors, click **Upload**.



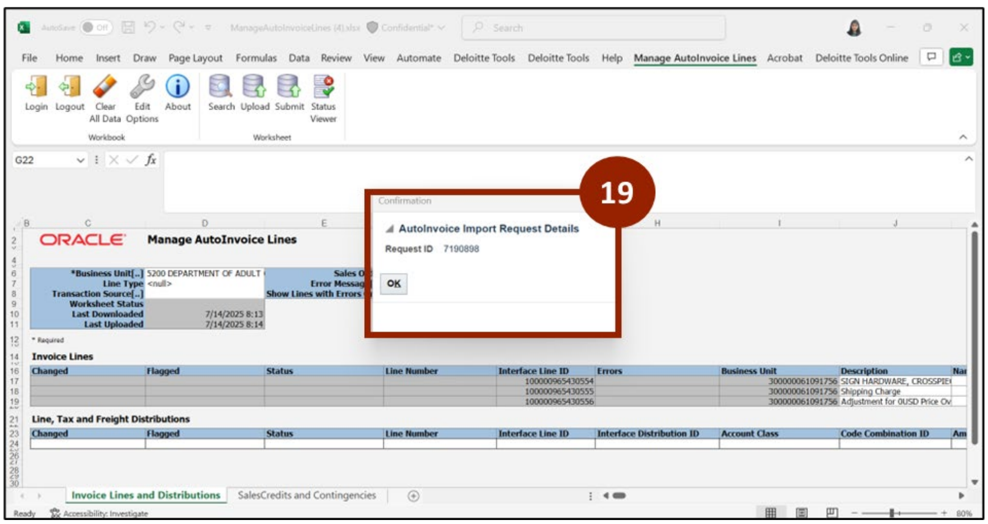
17. To submit the AutoInvoice, select **5200 Department of Adult Correction** as the *Business Unit* and **Distributed Order Orchestration** as the *Transaction Source*.



18. Click **Submit** to finalize the sales order.



19. A confirmation message will appear indicating successful submission. Select **OK**.



Wrap-Up

NCFS users can reference the ***Manage Autoinvoice Lines*** using the steps above.

Additional Resources

Instructor Led Training (ILT)

- AR107: Manage Billing

Change Record

Effective Date 11/18/2025

- QRG creation