



SUPPLIER REGISTRATION

AP

QUICK REFERENCE GUIDE AP-17

Purpose

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

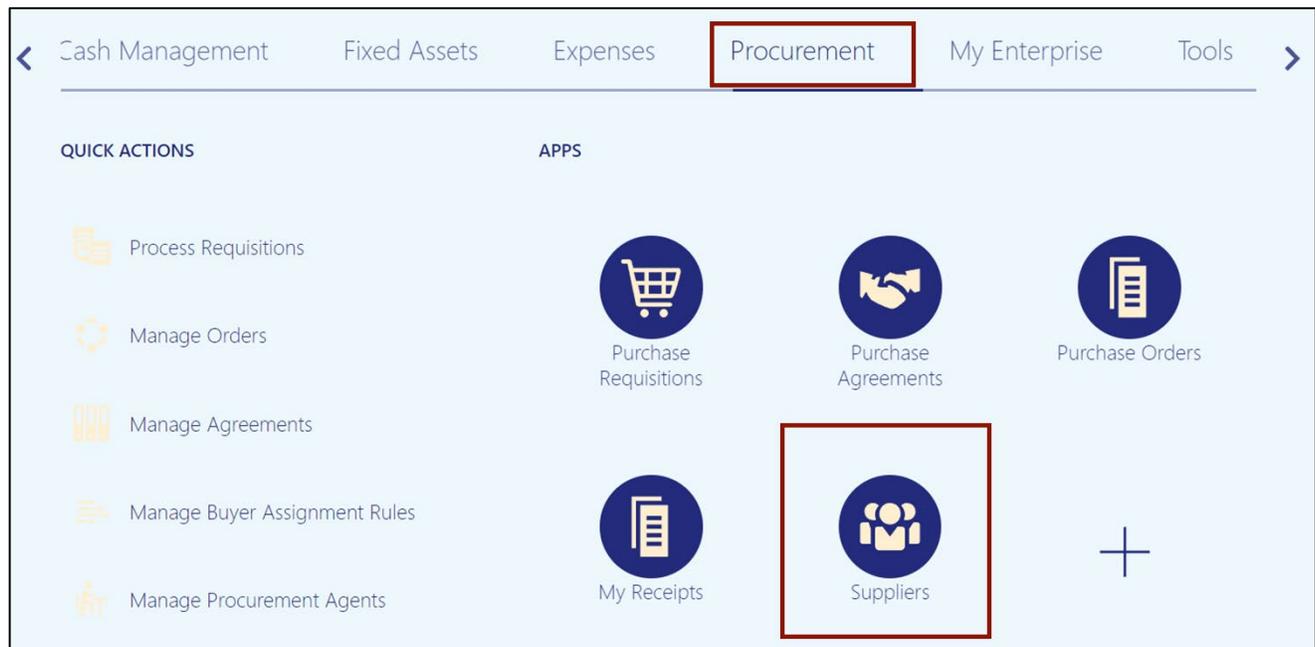
Introduction and Overview

This QRG covers the procedure of registration of suppliers in NCFS which will enable you to Register Supplier.

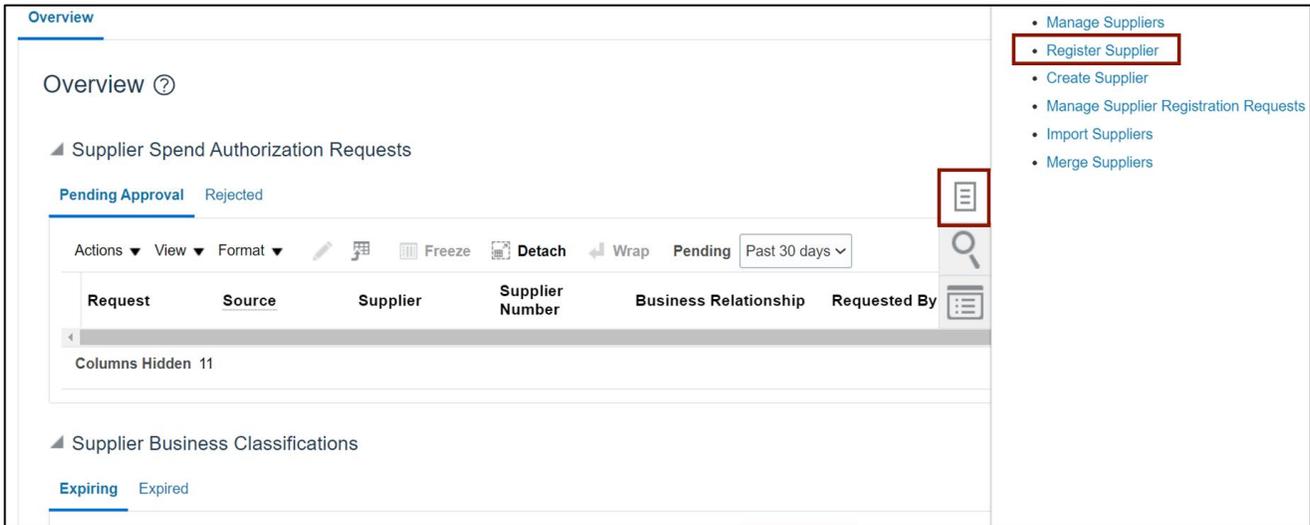
Create Supplier Profile Manually

To create supplier profile manually in NCFS, please follow the steps below:

1. Log in to the NCFS portal with your credentials to access the system.
2. On the **Home** page, click the **Procurement** tab, and then click the **Supplier** app.

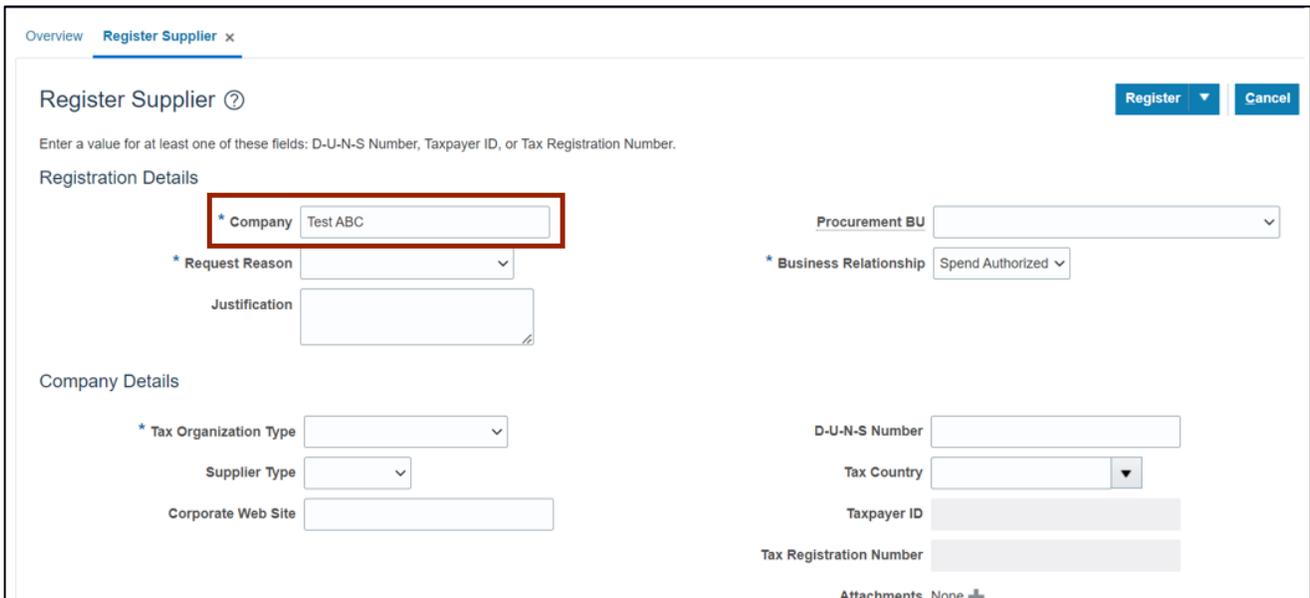


3. On the **Overview** page, click the **Tasks** [☰] icon and then click **Register Supplier**.



4. The **Register Supplier** page opens. On the **Registration Details** section, enter the **Company name** in the *Company* field.

In this example, we choose **Test ABC**.



5. Click the *Request Reason* drop-down, then select **New Supply Source**.

The screenshot shows the 'Register Supplier' form with the following fields and values:

- Company:** Test ABC
- Request Reason:** New Supply Source (highlighted with a red box)
- Justification:** (empty text area)
- Procurement BU:** (empty dropdown)
- Business Relationship:** Spend Authorized
- Tax Organization Type:** (empty dropdown)
- Supplier Type:** (empty dropdown)
- Corporate Web Site:** (empty text field)
- D-U-N-S Number:** (empty text field)
- Tax Country:** (empty dropdown)
- Taxpayer ID:** (empty text field)
- Tax Registration Number:** (empty text field)
- Attachments:** None

6. On the *Justification* field, enter the **Justification**.

The screenshot shows the 'Register Supplier' form with the following fields and values:

- Company:** Test ABC
- Request Reason:** New Supply Source
- Justification:** Test ABC (highlighted with a red box)
- Procurement BU:** (empty dropdown)
- Business Relationship:** Spend Authorized
- Tax Organization Type:** (empty dropdown)
- D-U-N-S Number:** (empty text field)

7. Select the Procurement Business Unit.

In this example **0800 DEPARTMENT OF PUBLIC INSTRUCTION** is selected in the *Procurement BU* field.

The screenshot shows the 'Register Supplier' form with the following fields and values:

- Registration Details:**
 - * Company: Test ABC
 - * Request Reason: New Supply Source
 - Justification: Test ABC
 - * Business Relationship: Spend Authorized
 - Procurement BU: 0800 DEPARTMENT OF PUBLIC INSTRUCTION** (highlighted with a red box)
- Company Details:**
 - * Tax Organization Type: (empty)
 - Supplier Type: (empty)
 - Corporate Web Site: (empty)
 - D-U-N-S Number: (empty)
 - Tax Country: (empty)
 - Taxpayer ID: (empty)

8. In *Company Details* section, from the **Tax Organization Type** drop-down choice list select **UNDESIGNATED**.

The screenshot shows the 'Register Supplier' form with the following fields and values:

- Registration Details:**
 - * Company: Test ABC
 - * Request Reason: New Supply Source
 - Justification: Test ABC
 - * Business Relationship: Spend Authorized
 - Procurement BU: 0800 DEPARTMENT OF PUBLIC INSTRUCTION
- Company Details:**
 - * Tax Organization Type: UNDESIGNATED** (highlighted with a red box)
 - Supplier Type: (empty)
 - Corporate Web Site: (empty)
 - D-U-N-S Number: (empty)
 - Tax Country: (empty)
 - Taxpayer ID: (empty)
 - Tax Registration Number: (empty)

9. Click the *Supplier Type* drop-down choice list, then select **Supplier**.

Overview **Register Supplier** x

Register Supplier ?

Register Cancel

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

Registration Details

* Company Test ABC Procurement BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION

* Request Reason New Supply Source * Business Relationship Spend Authorized

Justification Test ABC

Company Details

* Tax Organization Type UNDESIGNATED D-U-N-S Number

Supplier Type Supplier Tax Country

Corporate Web Site Taxpayer ID

Tax Registration Number

10. Enter any of the following fields.

In this example we choose **989765456** for **D-U-N-S Number** (The D-U-N-S Number should be 9 digit or 13 digits), **United States** for **Tax Country** and **00001** for **Taxpayer ID**.

Register Supplier ?

Register Cancel

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

Registration Details

* Company Test ABC Procurement BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION

* Request Reason * Business Relationship Spend Authorized

Justification Test ABC

Company Details

* Tax Organization Type UNDESIGNATED

Supplier Type Supplier

Corporate Web Site

D-U-N-S Number 989765456

Tax Country United States

Taxpayer ID 00001

Tax Registration Number

Attachments None +

11. Click the + icon to add attachment.

Register Supplier ? Register Cancel

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

Registration Details

* Company Procurement BU

* Request Reason * Business Relationship

Justification

Company Details

* Tax Organization Type D-U-N-S Number

Supplier Type Tax Country

Corporate Web Site Taxpayer ID

Tax Registration Number

Attachments None +

12. The Attachments pop-up apperas, click the **Choose File** button.

Register Supplier ? Register Cancel

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

Registration Details

* Company Procurement BU

Attachments ×

Actions ▼ View ▼ + ×

Type	Category	* File Name or URL	Title	Description	Attached
<input type="text" value="File"/>	<input type="text" value="From Supplier"/>	Choose File No file chosen	<input type="text"/>	<input type="text"/>	Training Su

Rows Selected 1

OK Cancel

Tax Registration Number

Attachments None +

13. The **File Name** and the **Title** will be updated in the respective fields. Click the **OK** button.

Register Supplier ? Register Cancel

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

Registration Details

* Company Test ABC Procurement BU 0800 DEPARTMENT OF PUBLIC INSTRUCTION

Attachments ×

Actions ▼ View ▼ + ×

Type	Category	* File Name or URL	Title	Description	Attached
File ▼	From Supplier ▼	Substitute W9.xlsx Update...	Substitute W9.xlsx		Training Su

Rows Selected 1

OK Cancel

Tax Registration Number

Attachments None +

14. Scroll down to the **Contacts** section. Click the **Actions** drop-down choice list, then select **Create**.

Company Details

* Tax Organization Type

Supplier Type

Corporate Web Site

D-U-N-S Number 989765456

Tax Country United States ▼

Taxpayer ID 00001

Tax Registration Number

Attachments Substitute W9.xlsx + ×

Contacts

Enter at least one contact.

Actions ▼ View ▼ Format ▼ + ✎ × 📄 Freeze 📄 Detach ↶ Wrap

Create

Edit

Delete

Job Title	Email	Administrative Contact	Request User Account

15. The *Create Contact* window pop-up appears. Enter the **First Name, Middle Name and Last Name**.

The screenshot shows the 'Create Contact' window with the following fields filled out:

- Salutation: (dropdown menu)
- * First Name: Test
- Middle Name: (empty)
- * Last Name: ABC
- Job Title: (empty)
- Administrative contact:
- Phone: (dropdown menu) [] [] [] []
- Mobile: (dropdown menu) [] [] [] []
- Fax: (dropdown menu) [] [] [] []
- * Email: (empty)

The 'User Account' section has a 'Create user account' checkbox which is unchecked.

The 'Roles' section shows a table with columns 'Role' and 'Description'. The table is currently empty.

16. Enter the email id in the *Email* field.

The screenshot shows the 'Create Contact' window with the email field filled out:

- Salutation: (dropdown menu)
- * First Name: Test
- Middle Name: (empty)
- * Last Name: ABC
- Job Title: (empty)
- Administrative contact:
- Phone: (dropdown menu) [] [] [] []
- Mobile: (dropdown menu) [] [] [] []
- Fax: (dropdown menu) [] [] [] []
- * Email: Testabc@test.com

The 'User Account' section has a 'Create user account' checkbox which is unchecked.

The 'Roles' section shows a table with columns 'Role' and 'Description'. The table is currently empty.

17. Click the **OK** button.

Create Contact

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

* Email

User Account

Create user account

Roles

Actions View Format X Freeze Detach Wrap

Role	Description

Create Another **OK** Cancel

18. The contact is added in the **Contacts** section.

Contacts

Enter at least one contact.

Actions View Format + X Freeze Detach Wrap

Name	Job Title	Email	Administrative Contact	Request User Account
ABC, Test		Testabc@test.com	—	—

19. Scroll up the page, click the **Register** button.

Overview **Register Supplier** x

Register Supplier ?

Register **Register** Cancel

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

Registration Details

* Company

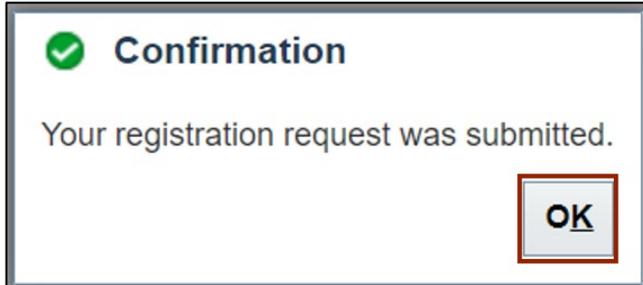
* Request Reason

Justification

Procurement BU

* Business Relationship

20. On the *Confirmation* pop-up, click the **OK** button.



Wrap-Up

Register Suppliers using the steps above to register the supplier registration request and update the supplier data elements.

Additional Resources

Virtual Instructor-Led Training (vILT)

- PO105: Supplier Management
- PO104: Supplier Registration