



DPI – Process for Creating Customer

Quick Reference Guide AR-19

AR-19

Purpose

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

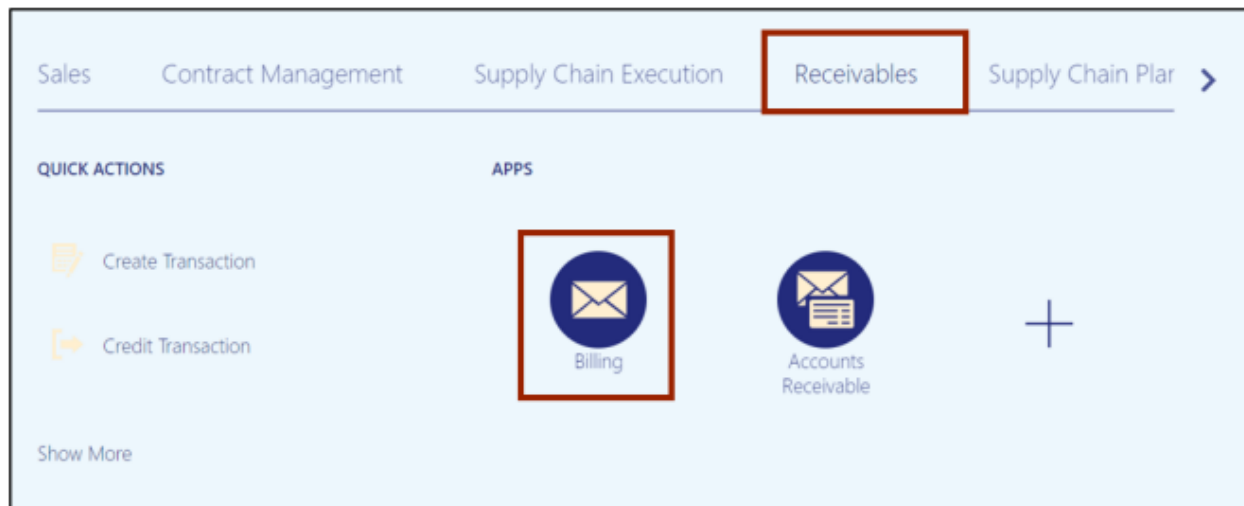
Introduction and Overview


This QRG covers the steps to create a customer in NCFS. This process also allows you to create the customer billing information.

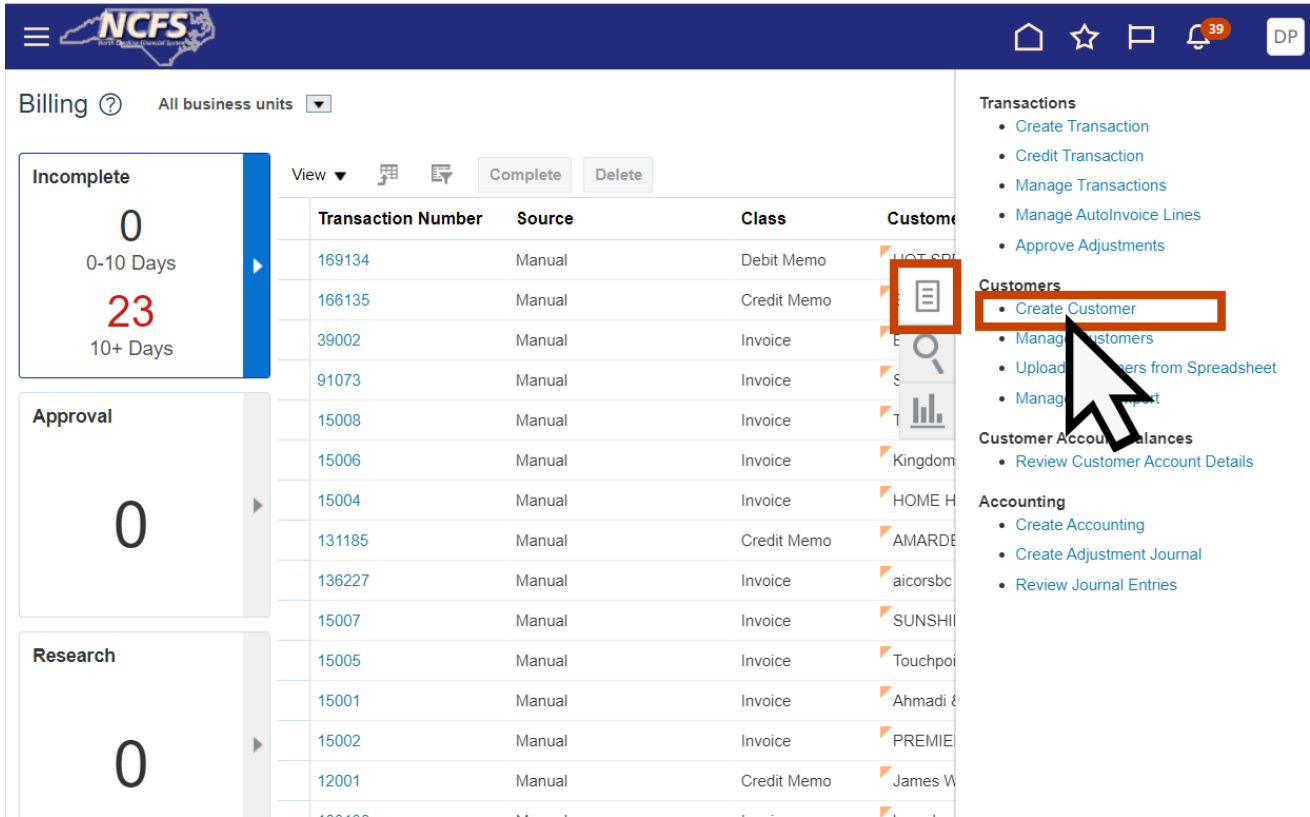
Steps to Create A Customer in NCFS

To create customer 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 **Receivables** tab and click the **Billing** app.



- The Billing page appears. On the **Billing** page, click the **Tasks** [] icon and click **Create Customers** link in the left pane.





Billing ? All business units ▼

Incomplete
0
0-10 Days
23
10+ Days

Approval
0

Research
0

View ▼   Complete Delete

Transaction Number	Source	Class	Customer
169134	Manual	Debit Memo	UOT SP
166135	Manual	Credit Memo	E
39002	Manual	Invoice	S
91073	Manual	Invoice	S
15008	Manual	Invoice	T
15006	Manual	Invoice	Kingdom
15004	Manual	Invoice	HOME H
131185	Manual	Credit Memo	AMARDE
136227	Manual	Invoice	aicorsbc
15007	Manual	Invoice	SUNSHII
15005	Manual	Invoice	Touchpo
15001	Manual	Invoice	Ahmadi &
15002	Manual	Invoice	PREMIE
12001	Manual	Credit Memo	James W

Transactions

- Create Transaction
- Credit Transaction
- Manage Transactions
- Manage AutoInvoice Lines
- Approve Adjustments

Customers

- Create Customer**
- Manage Customers
- Upload Customers from Spreadsheet
- Manage Support

Customer Account Balances

- Review Customer Account Details

Accounting

- Create Accounting
- Create Adjustment Journal
- Review Journal Entries

4. The Create Customers page opens.

Create Organization Customer ?

Customer Type

Organization Information

* Name

Registry ID 368439

Account Information

Account Number 59720

Account Description

Account Type

Customer Class

Account Address

* Account Address Set

* From Date 9/9/24

To Date

Enter Customer Account Site Information

Address

Account Address Details

Address Purposes

Actions View Format + X ☑ ↩ Wrap

	Primary	Site	From Date	To Date
No data to display.				

Enter Party Details

←

Enter Account Details

←

Enter Site Details

←

5. **Enter Party Details.** In the **Organization Information** section, enter the correct **Name**.
6. **Enter Account Details:**
 - a. **Account Information** Enter the data into the following fields: **Account Description Account Type, Customer Class, Customer Account Information.**
 - b. **Account Address:** In the Account Address section, select the **Account Address Set** and **Enter Customer Account Site Information.**
7. **Enter Site Details:** In the **Address** section of the page, enter the correct data into the following fields: **Address Line 1, City, State, Postal Code, County.**
8. No information is needed in the **Account Address Details** section.
9. In the **Address Purposes** section of the page, click the + icon to add address purpose(s).



10. Select the drop-down box in the **Purpose** column and Select **Bill-to, Ship-to, Dunning, and Statements**.

The screenshot shows a form with several input fields: * State, * Zip Code, Zip Code Extension, * County, and Sales Tax Geocode. Below these is a checked box for 'Sales Tax Inside City Limits'. The 'Account Address Details' section includes Customer Category Code, Site Language, and Translated Customer Name. The 'Address Purposes' section contains a table with columns: Primary, Site, From Date, To Date, and Purpose. The 'Purpose' column has a dropdown menu open, listing options: Acknowledgments, Bill to, Bills of lading, Correspondence, Credit contact, Credit memos, Deliver to, Drawee, Dunning, Installed at, Invoices, Late charges, Legal, Self service user, Ship to, Sold to, Statements, and Subscription Location. The 'Statements' option is highlighted. A mouse cursor is pointing at the dropdown arrow. Arrows point from the dropdown items to the 'Purpose' column header and the 'Statements' option.

Primary	Site	From Date	To Date	Purpose
	89616	9/10/24		Bill-to Site

11. Select **“Save and Close”** in the upper right-hand corner of the page.

The screenshot shows the top navigation bar with the NCFS logo and a notification badge with '30'. Below the navigation bar is the page title 'Create Organization Customer'. The 'Customer Type' is set to 'Organization'. The 'Organization Information' section has input fields for '* Name' and 'D-U-N-S Number'. The 'Save and Close' button is highlighted with a red box and a mouse cursor.

Wrap Up

This QRG covers the steps to create a customer in NCFS. This process also allows you to create the customer billing information.