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

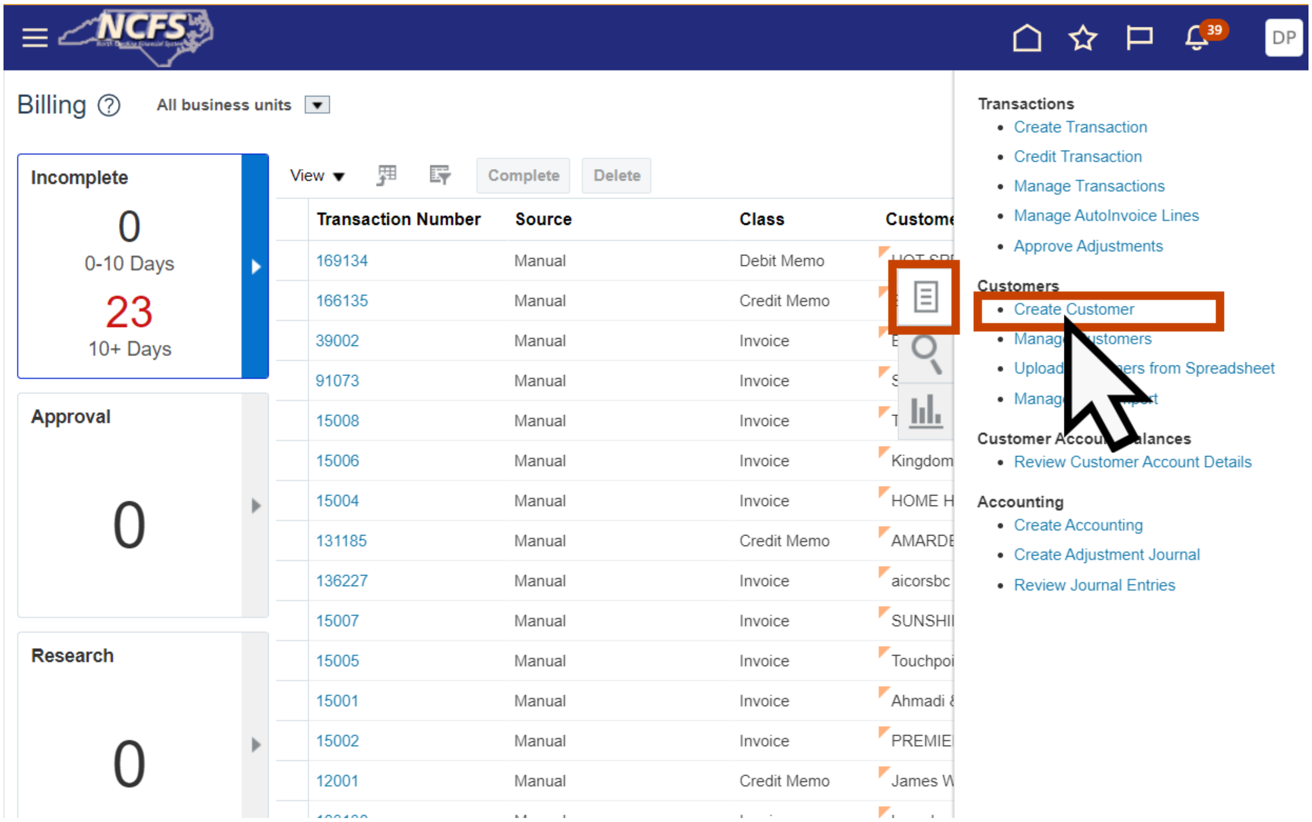
This QRG covers the steps to create a customer in NCFS. This process also allows you to create the customer billing information.

Steps to Create A Customer in NCFS

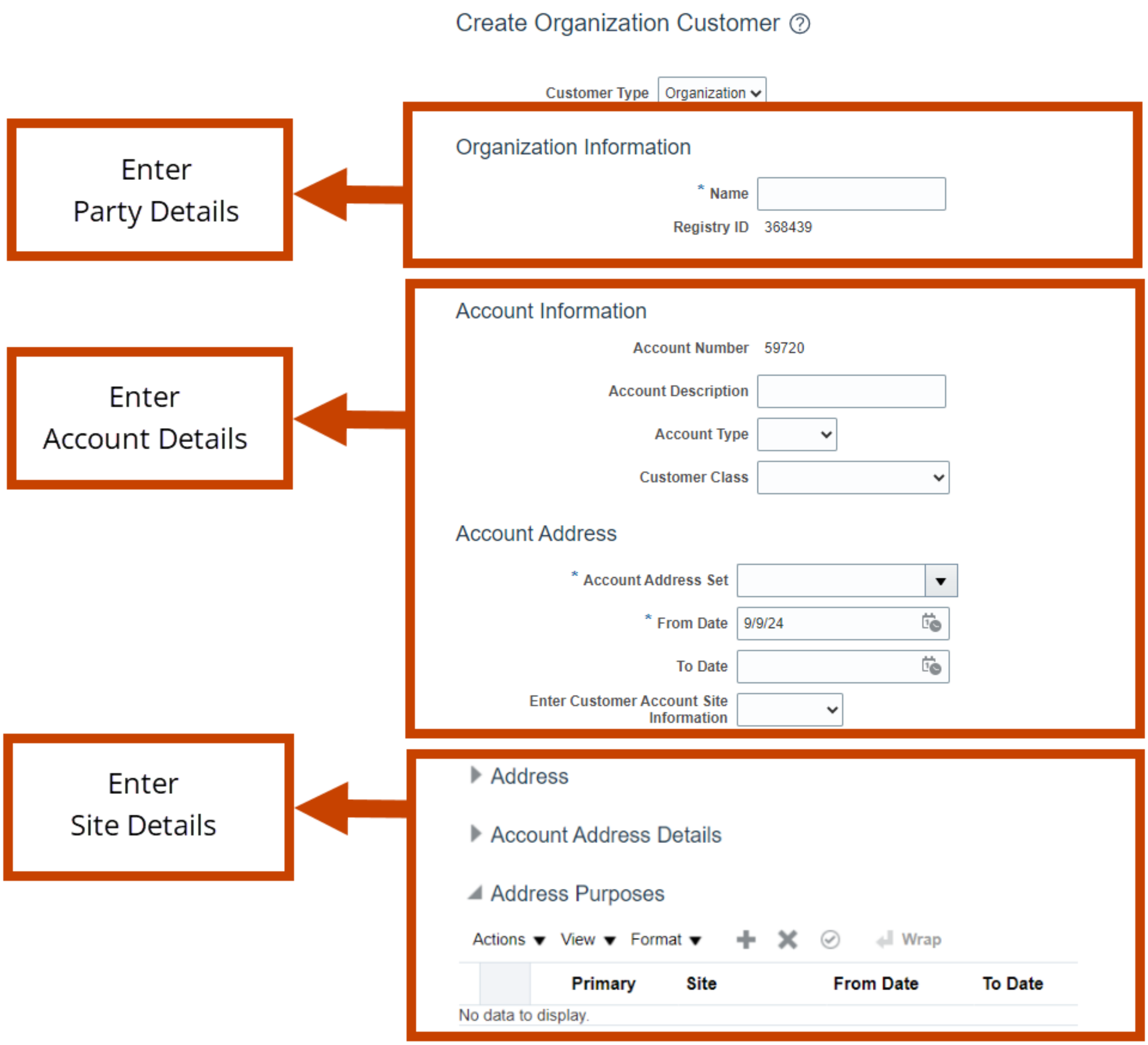
To create customer in NCFS, please follow the steps below:

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.

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



4. The Create Customers page opens.



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.**

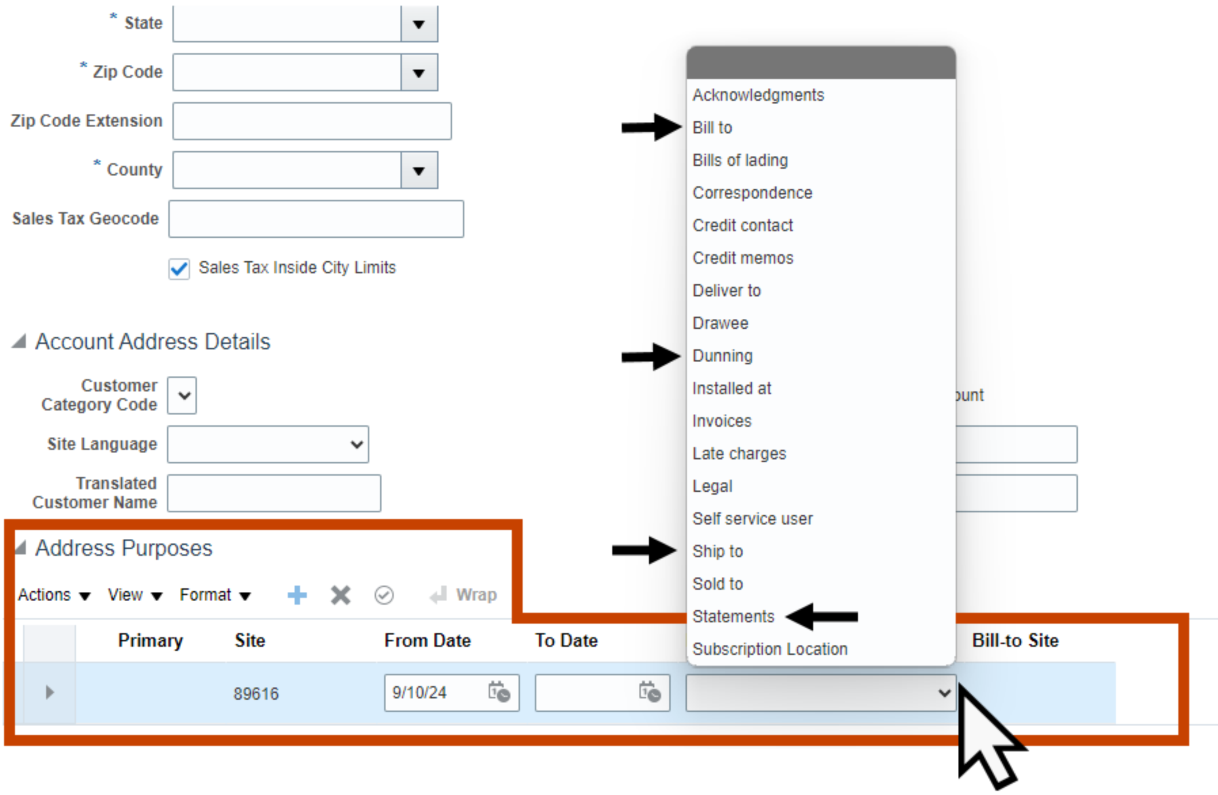
    b. **Account Address:** In the Account Address section, select the **Account Address Set** and **Enter Customer Account Site Information**.

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.**

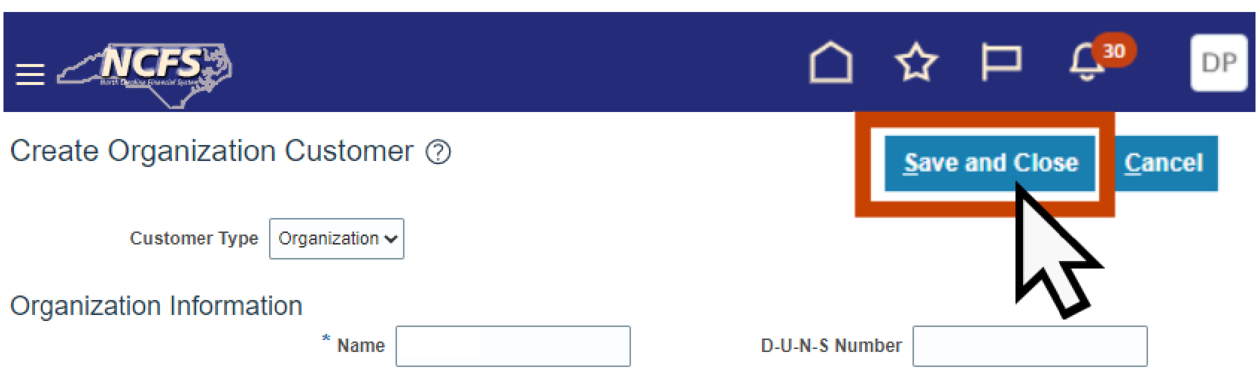
8. No information is needed in the **Account Address Details** section.

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**.



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



Wrap Up

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