



CREATE SUPPLIER REGISTRATION REQUEST

P2P

QUICK REFERENCE GUIDE P2P-05

Purpose

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

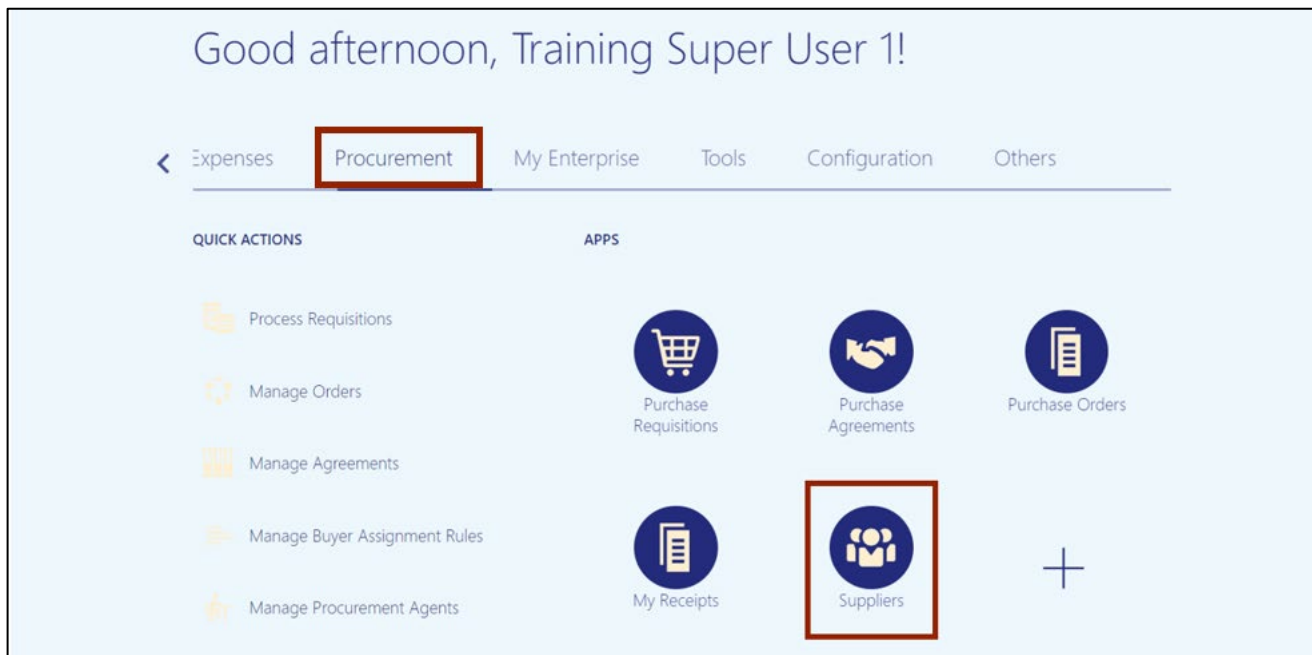
Introduction and Overview

This QRG covers the process of creating supplier registration requests in NCFS.

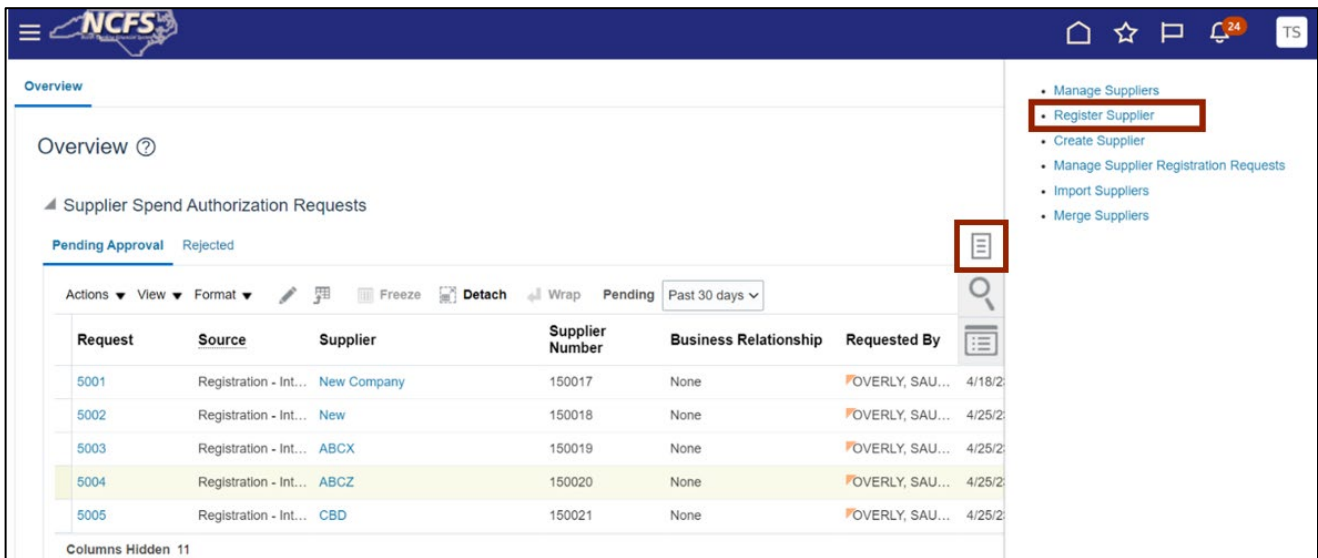
Create Supplier Registration Request

To create Supplier Registration Request, 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 select the **Suppliers** app.



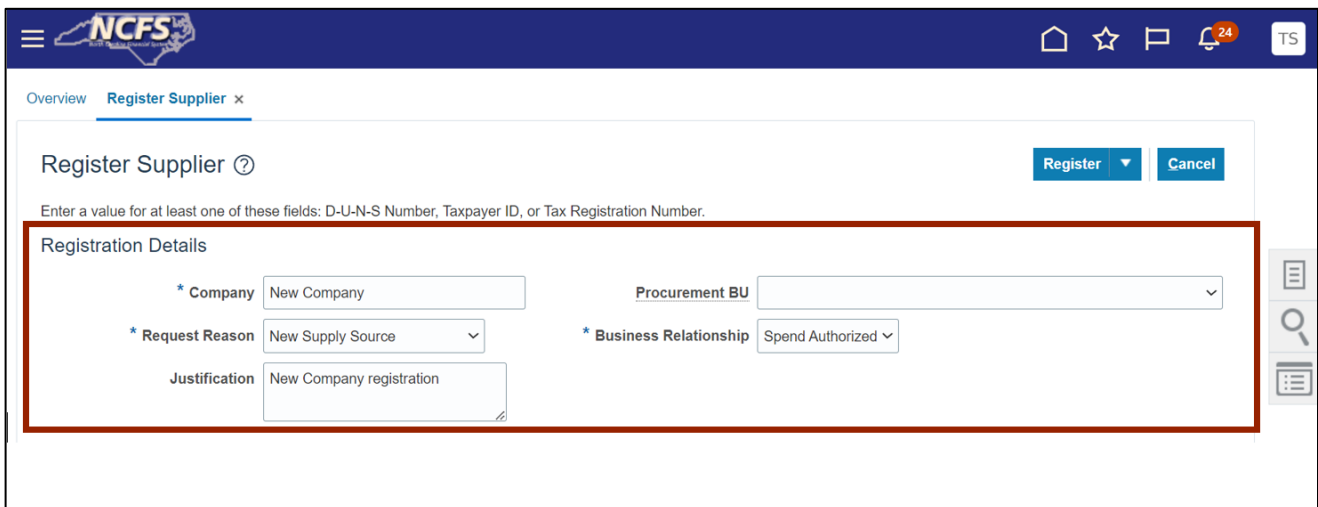
- On the **Overview** page, click the **Tasks** [] icon and then click **Register Supplier**.



- On the **Register Supplier** page, under **Registration Details** section, enter a value or select parameter for the fields with * (asterisk) mark.

In this example, enter/choose:

- *Company: New Company (type in)**
- *Request reason: New Supply Source**
- *Business relationship: Spend Authorized (on the right-side column)**
- *Justification: New Company registration (type in)**



- Under the **Company Details** section, enter values and select parameter for the field with * (asterisk) mark.

In this example, enter/choose:

***Tax Organization Type: UNDESIGNATED/ Individual/Foreign**

Supplier Type: Supplier

D-U-N-S Number: 989765456 (if applicable) right side column

Tax Country: United States

Taxpayer ID: 256158740

And select the **Attachments** or **Add [+]** icon to add W9

Note: Enter appropriate taxpayer ID or DUNS number, the above is an example.

Company Details

* Tax Organization Type	UNDESIGNATED	D-U-N-S Number	989765456
Supplier Type	Supplier	Tax Country	United States
Corporate Web Site		Taxpayer ID	256158740
		Tax Registration Number	
		Attachments	None +

- The **Attachments** pop-up appears. Choose a file under ***File Name or URL** and click the **OK** button.

Attachments

Type	Category	* File Name or URL	Title	Description	Attached
File	From Supplier	Profile tab of Supplier.png	Update...	Profile tab of Supplier.png	Training Su

Rows Selected 1

OK Cancel

7. Under **Contacts** section, click the **add [+]** icon.



8. The *Create Contact* pop-up appears. Enter a value for field marked with * (asterisk) mark

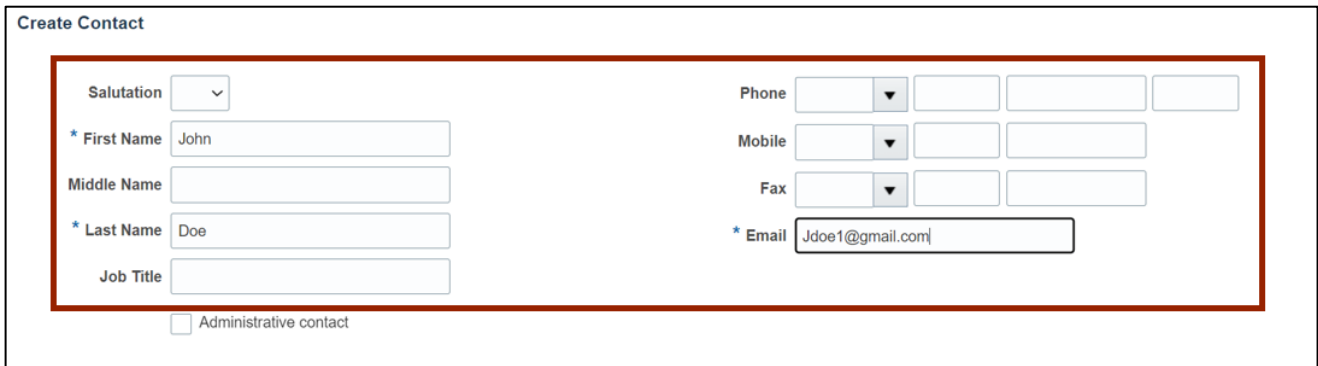
In this example, enter/choose:

***First Name: John**

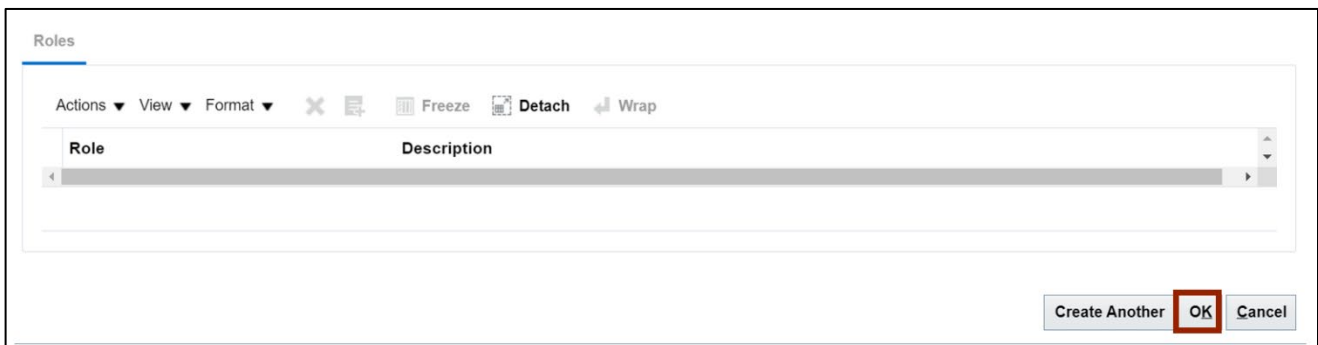
***Last Name: Doe**

***Email: Jdoe1@gmail.com**

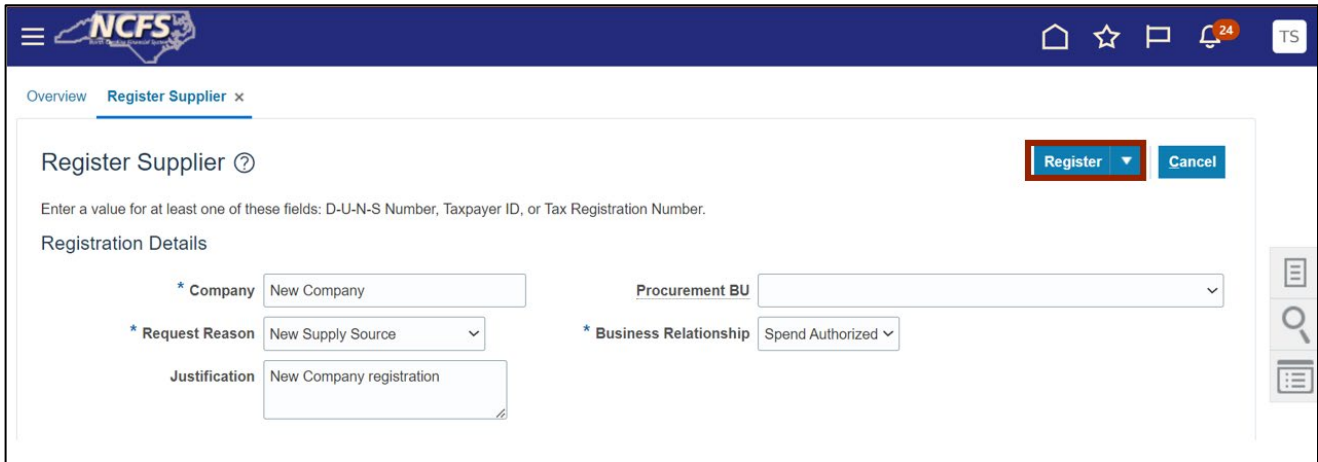
Note: Enter appropriate data, the above is an example.



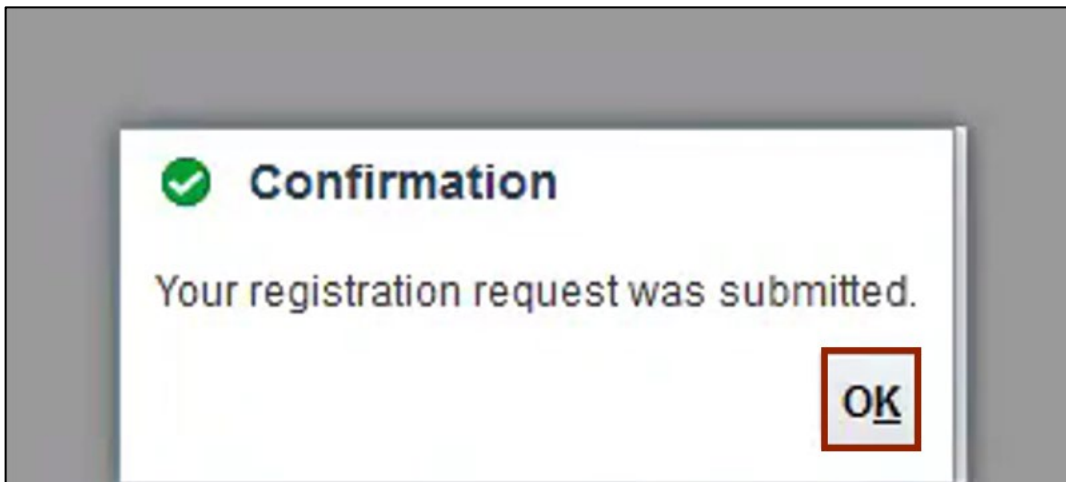
9. Click the **OK** button.



10. On the **Register Supplier** page, click the **Register** button at the top of screen. Supplier Registration will be sent for Approval to Supplier Managers.



11. A *Confirmation* pop-up appears. Click the **OK** button. Once Approved, the Supplier can be used for creating transactions.



Wrap-Up

Create supplier registration requests in NCFS which will enable you to submit supplier registration request to OSC for review and approval. Once the supplier registration user receives the spend authorized approval notification, and the supplier setup is complete and can be used on invoices or purchase orders as needed.

Additional Resources

Virtual Instructor-Led Training (vILT)

- PO104: Supplier Registration Management