

# CREATE SUPPLIER REGISTRATION REQUEST

## **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.

	Good afternoon	, Training Supe	er User 1!	
<	Expenses Procurement	My Enterprise Tools	Configuration	Others
	QUICK ACTIONS	APPS		
	Process Requisitions			
	Manage Orders	Purchase Requisitions	Purchase	Purchase Orders
	Manage Agreements			
	Manage Buyer Assignment Rules			+
	Manage Procurement Agents	My Receipts	Suppliers	1



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

erview							Manage Suppliers
Overview (?)							Register Supplier     Create Supplier     Manage Supplier Registration Reque
Supplier Spen Pending Approval	d Authorization Re	equests				Ξ	Import Suppliers     Merge Suppliers
Actions - View	Format 🗸 🥒	Freeze Deta	ch 🚽 Wrap Pending	Past 30 days V	1	0	
Autoris + view	Format V	3 million mil Deta	in a map renang	g rast oo days v		1	
Request	Source	Supplier	Supplier Number	Business Relationship	Requested By		
		Supplier	Supplier		Requested By	:=	
Request	Source	Supplier New Company	Supplier Number	Business Relationship		4/18/2:	
Request	Source Registration - Int	Supplier New Company New	Supplier Number 150017	Business Relationship	FOVERLY, SAU	4/18/2: 4/25/2:	
Request 5001 5002	Source Registration - Int Registration - Int	Supplier New Company New ABCX	Supplier Number 150017 150018	Business Relationship None None	FOVERLY, SAU	4/18/2: 4/25/2: 4/25/2:	

4. 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)

		TS
Overview Register Supplier ×		
Register Supplier ②	Register <b>C</b> ancel	
Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.		
Registration Details		
* Company New Company Procurement BU	~	Ξ
* Request Reason New Supply Source      * Business Relationship Spend Authorized		0
Justification New Company registration		:=

5. 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.

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

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

Туре	Category				
hand	cutogory	* File Name or URL	Title	Description	Attached
File 🗸	From Supplie	er V Profile tab of Supplier.png Update	Profile tab of Supplier.png	1	Training St
4					•

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

Contacts				
Enter at least one contact. Actions ▼ View ▼ Format ▼	🖍 🗙 💷 Freeze 📓 Detach 斗	Wrap		
Name	Job	Title Email	Administrative Contact	Request User Account
Columns Hidden 7				÷
Columns Hidden 7				

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

In this example, enter/choose:
* <i>First Name</i> : John
*Last Name: Doe
*Email: <u>Jdoe1@gmail.com</u>

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

Create Contact			
Salutation	~	Phone	
* First Name	John	Mobile	
Middle Name		Fax	
* Last Name	Doe	* Email	Jdoe1@gmail.com
Job Title		]	
	Administrative contact		

9. Click the **OK** button.

ctions  View  Forma	at 👻 📜 🖩 Freeze 📄 Detach 🚽 Wrap	
Role	Description	

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.

					TS
Overview Register Supplier ×					
Register Supplier ⑦				Register <b>C</b> ancel	
	ese fields: D-U-N-S Number, Taxpayer ID	, or Tax Registration Number.			
Registration Details					
* Company	New Company	Procurement BU		~	Ξ
* Request Reason	New Supply Source 🗸	* Business Relationship	Spend Authorized ~		0
Justification	New Company registration				:=
	li				

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

our registration request was submitte

#### 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