AR-19 DPI - Creating a Customer

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.

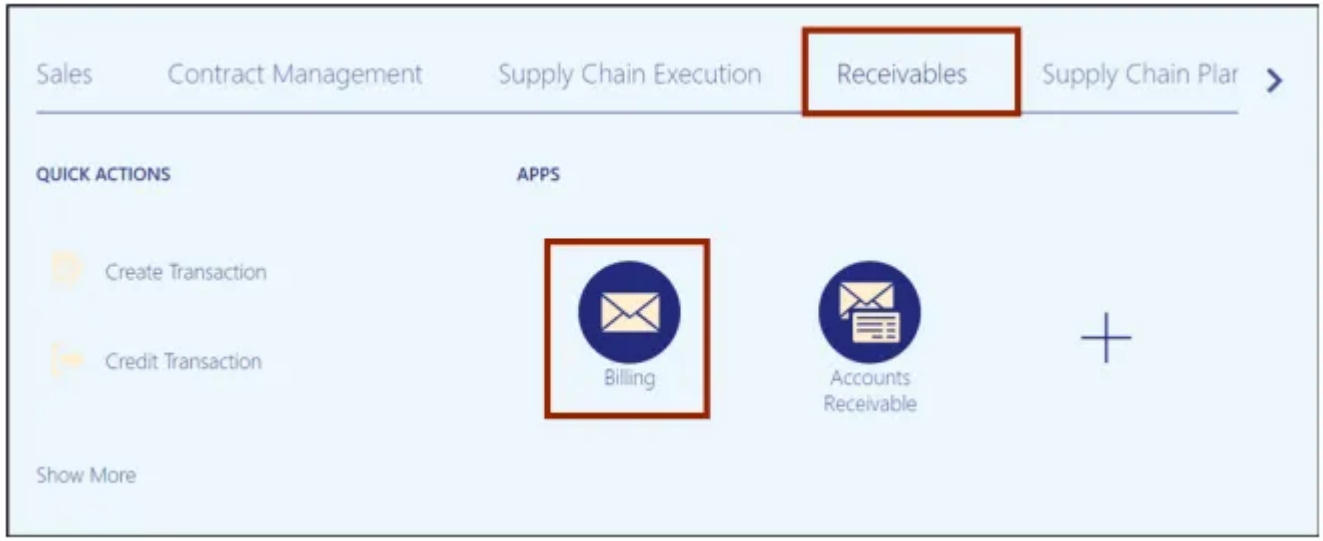
Steps to Create A Customer in NCFS

To create customer in NCFS, please follow the steps below. There are 11 steps to complete this process.

Step 1. Log in to the NCFS portal with your credentials to access the system.

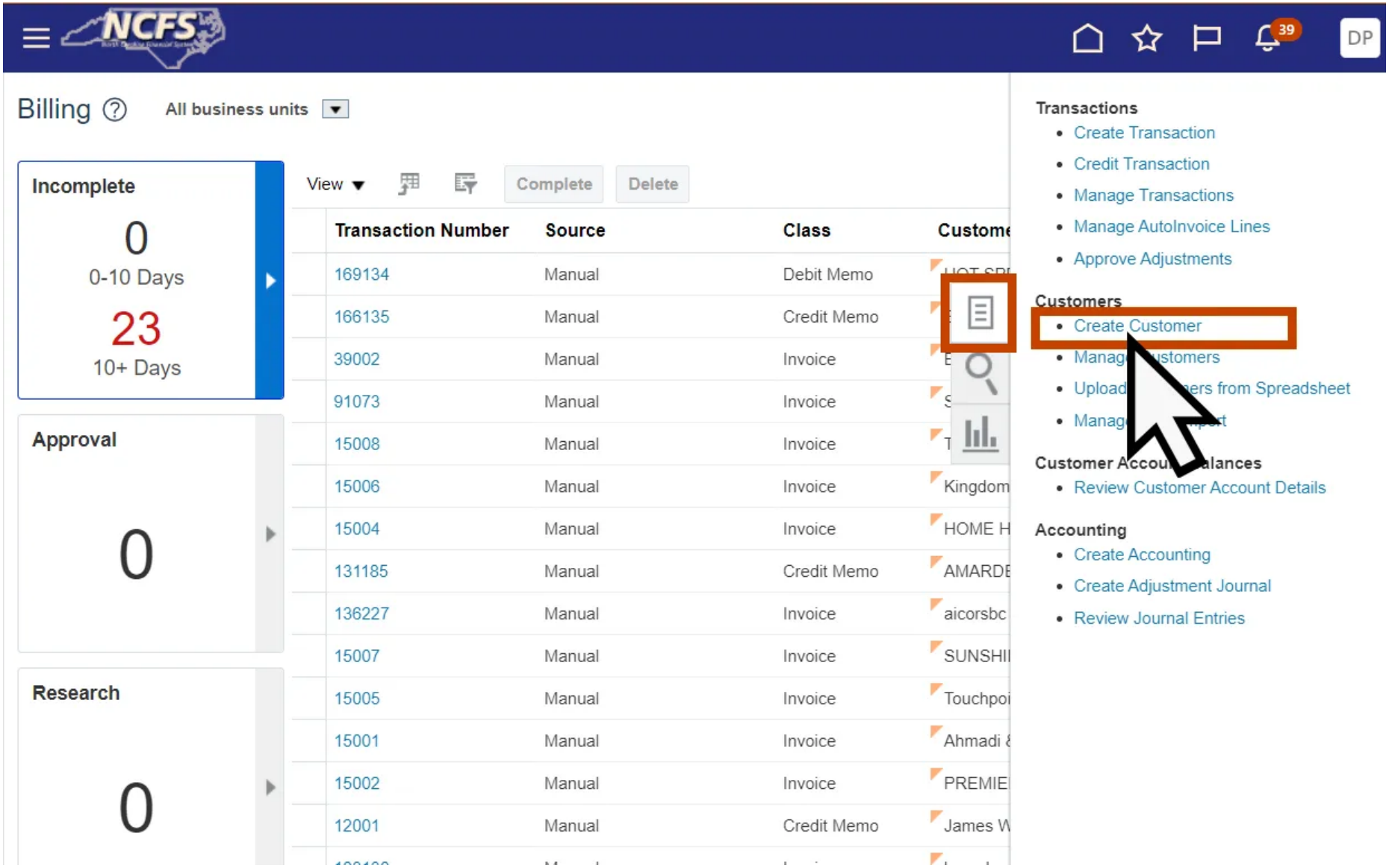
Step 2. On the **Home** page, click the **Receivables** tab and click the **Billing** app.

Image



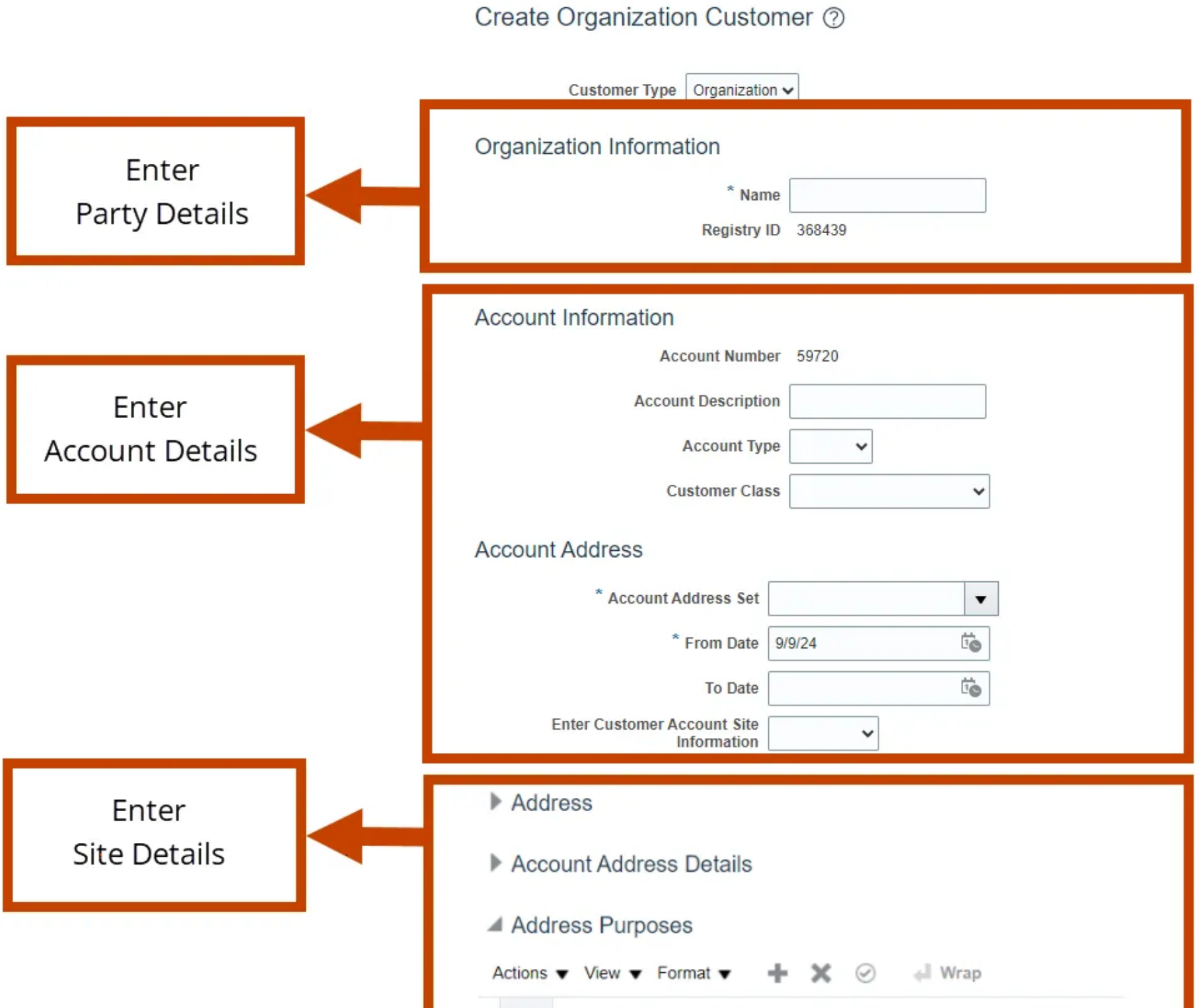
Step 3. The Billing page appears. On the **Billing** page, click the **Tasks** icon and click **Create Customers** link in the left pane.

Image



Step 4. The Create Customers page opens.

Image


Create Organization Customer
Customer Type
Organization
Enter
Party Details
Organization Information
* Name
Registry ID
368439
Enter
Account Details
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
Enter
Site Details
Address
Account Address Details
Address Purposes
Actions
View
Format
Wrap

Step 5. **Enter Party Details**: In the **Organization Information** section, enter the correct **Name**.

Step 6. **Enter Account Details**:

- **Account Information**: Enter the data into the following fields: **Account Description Account Type, Customer Class, Customer Account Information**.
- **Account Address**: In the Account Address section, select the **Account Address Set** and **Enter Customer Account Site Information**.

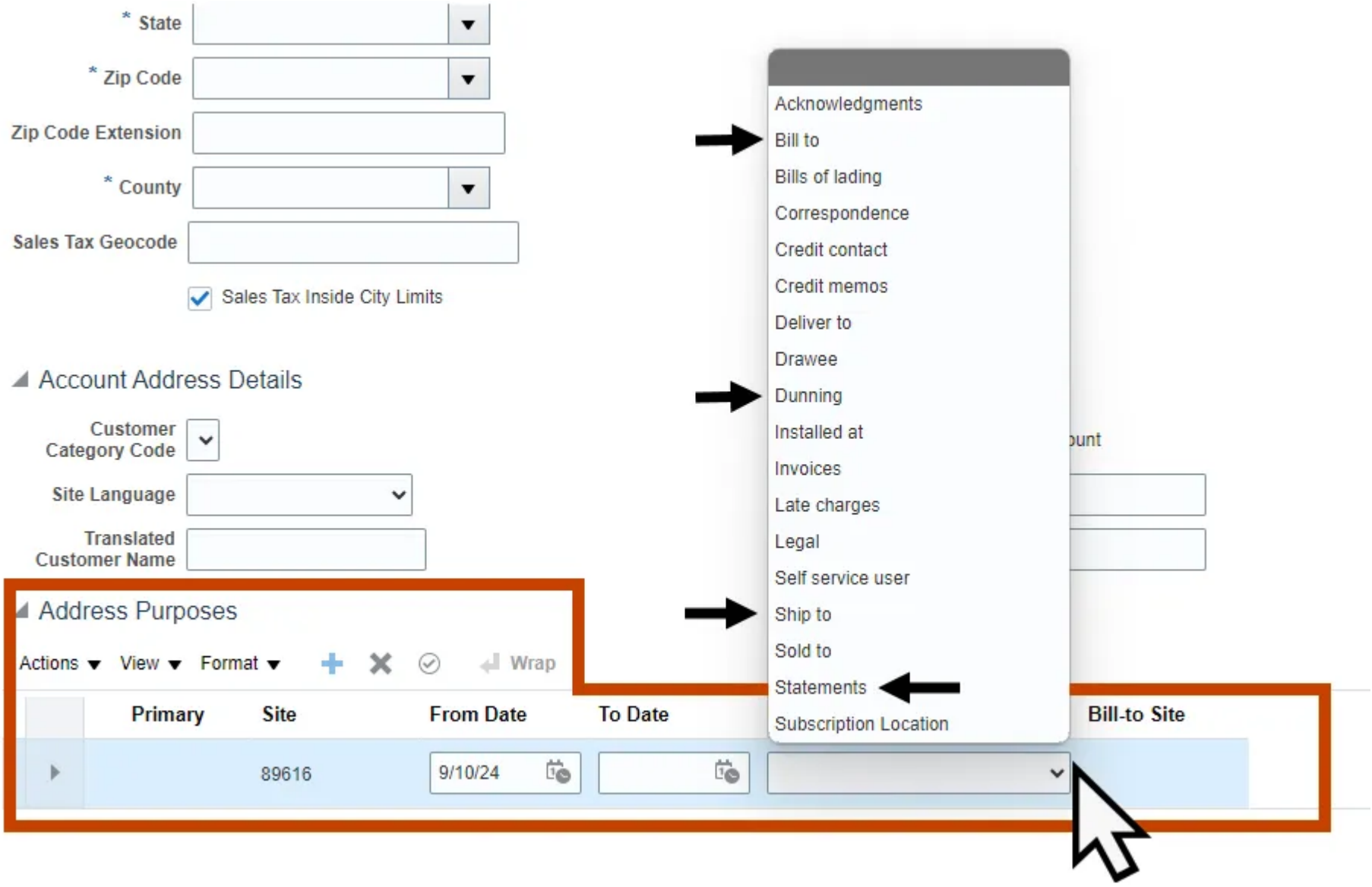
Step 7. **Enter Site Details**: In the **Address** section of the page, enter the correct data into the following fields: **Address Line 1, City, State, Postal Code, County**.

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

Step 9. In the **Address Purposes** section of the page, click the **Add** icon to add address purpose(s).

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

Image



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

Image



Wrap Up

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

First Published

Tue, 09/10/2024

Last Updated

Tue, 09/02/2025

Printable PDF