P2P-05 Create Supplier Registration Request

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.

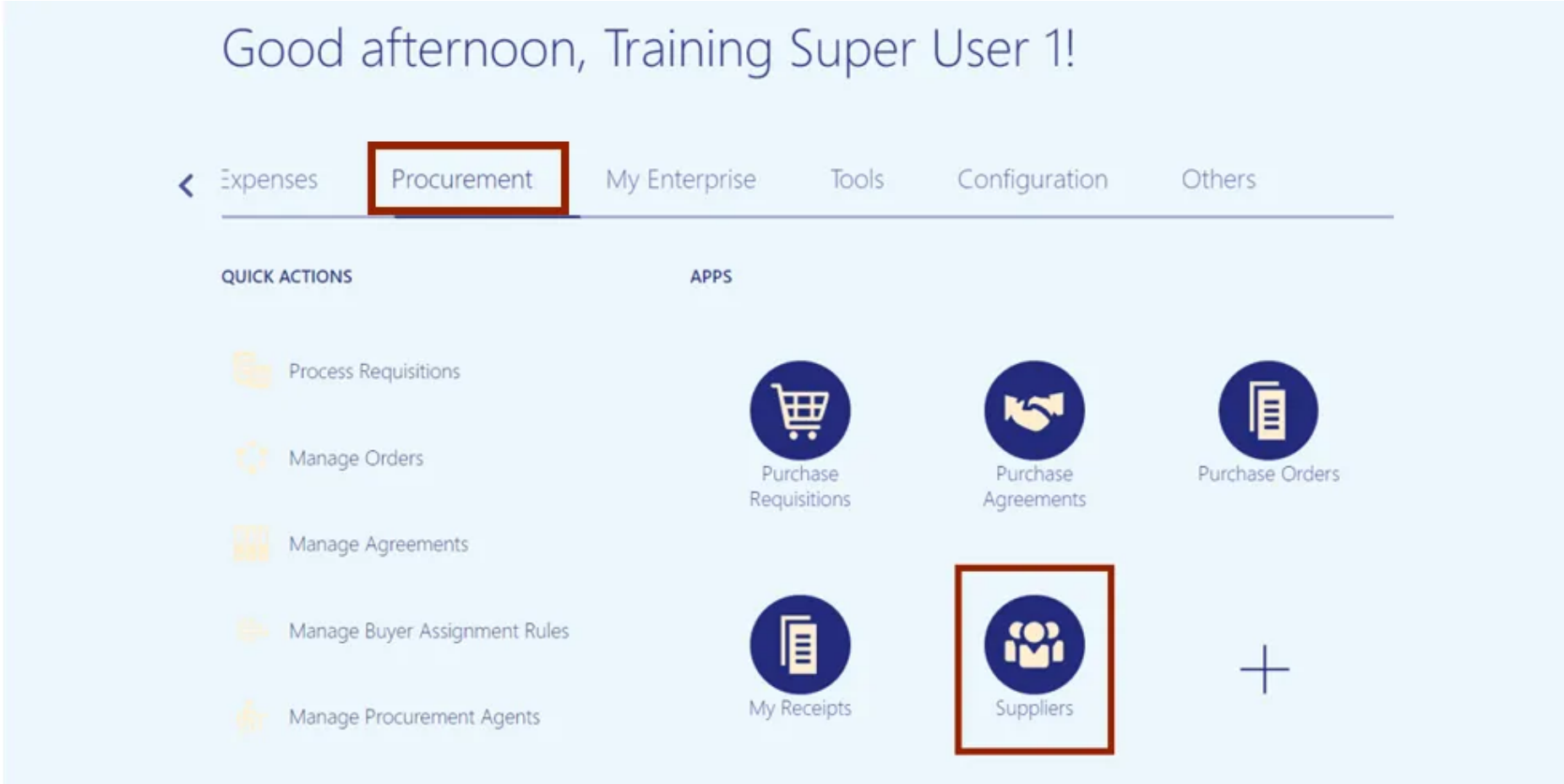
Create Supplier Registration Request

To create Supplier Registration Request, please follow the steps below. There are 11 steps to complete this process.

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

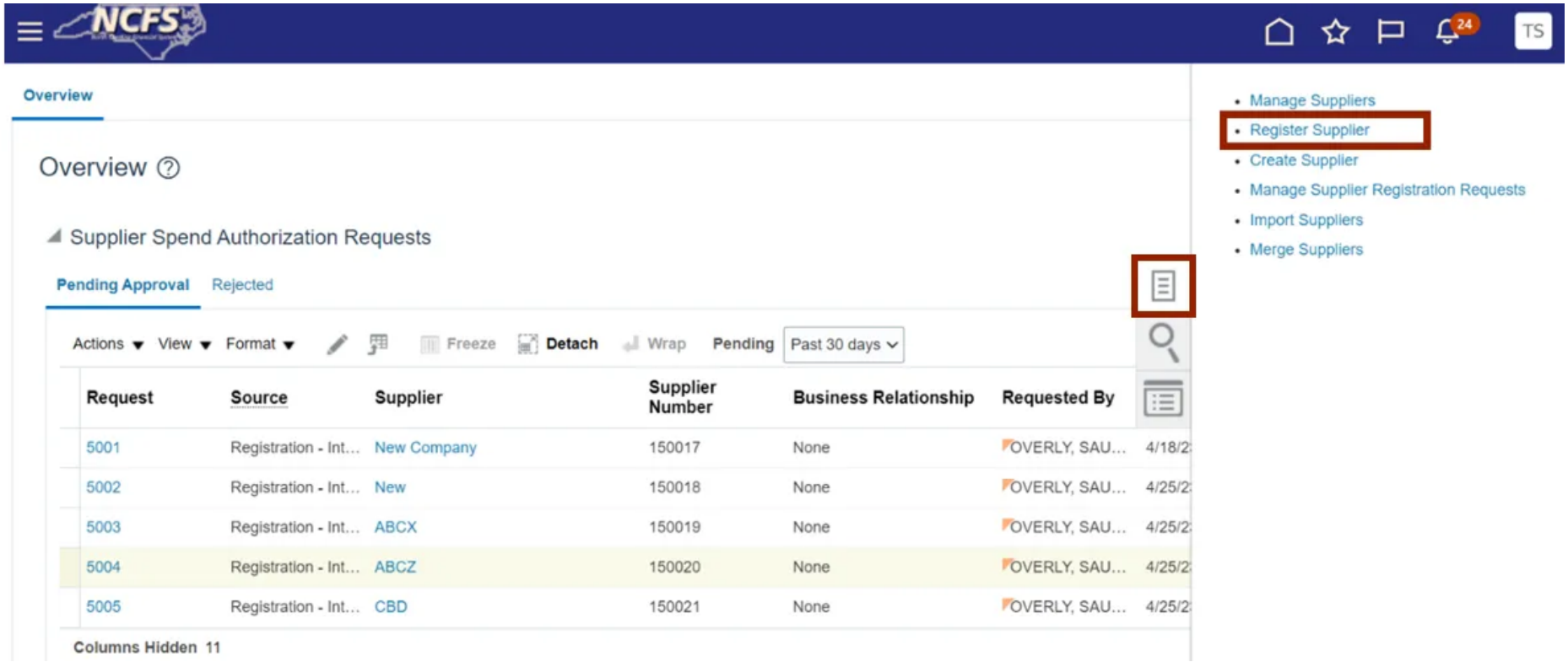
Step 2. On the **Home** page, click the **Procurement** tab and select the **Suppliers** app.

Image



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

Image



Step 4. A new internet tab will open with the **Supplier Registration** entry page.

Step 5. On the **Supplier Registration** page, in the **Company Details** section, enter a value or select parameter for the fields marked with Required in the bottom right of the field.

In this example, enter or select the following fields for the company details:

- Business relationship: Spend Authorized
- Procurement BU
- Request reason: New Supply Source
- Company: New Company (type in)

- Country: Select from the dropdown menu
- Taxpayer ID, Tax Registration Number, or D-U-N-S Number
- Organization Type: Select from the dropdown menu
- Justification: New Company registration (type in)

Image

Place company name here

Supplier Registration

1 | 2

Company Details

Business Relationship
Spend Authorized

Procurement BU
Required

Request Reason
Required

Company
Required

Website

Country
Required

Taxpayer ID

Tax Registration Number

D-U-N-S Number

Organization Type
Required

Supplier Type

Justification

Company Details

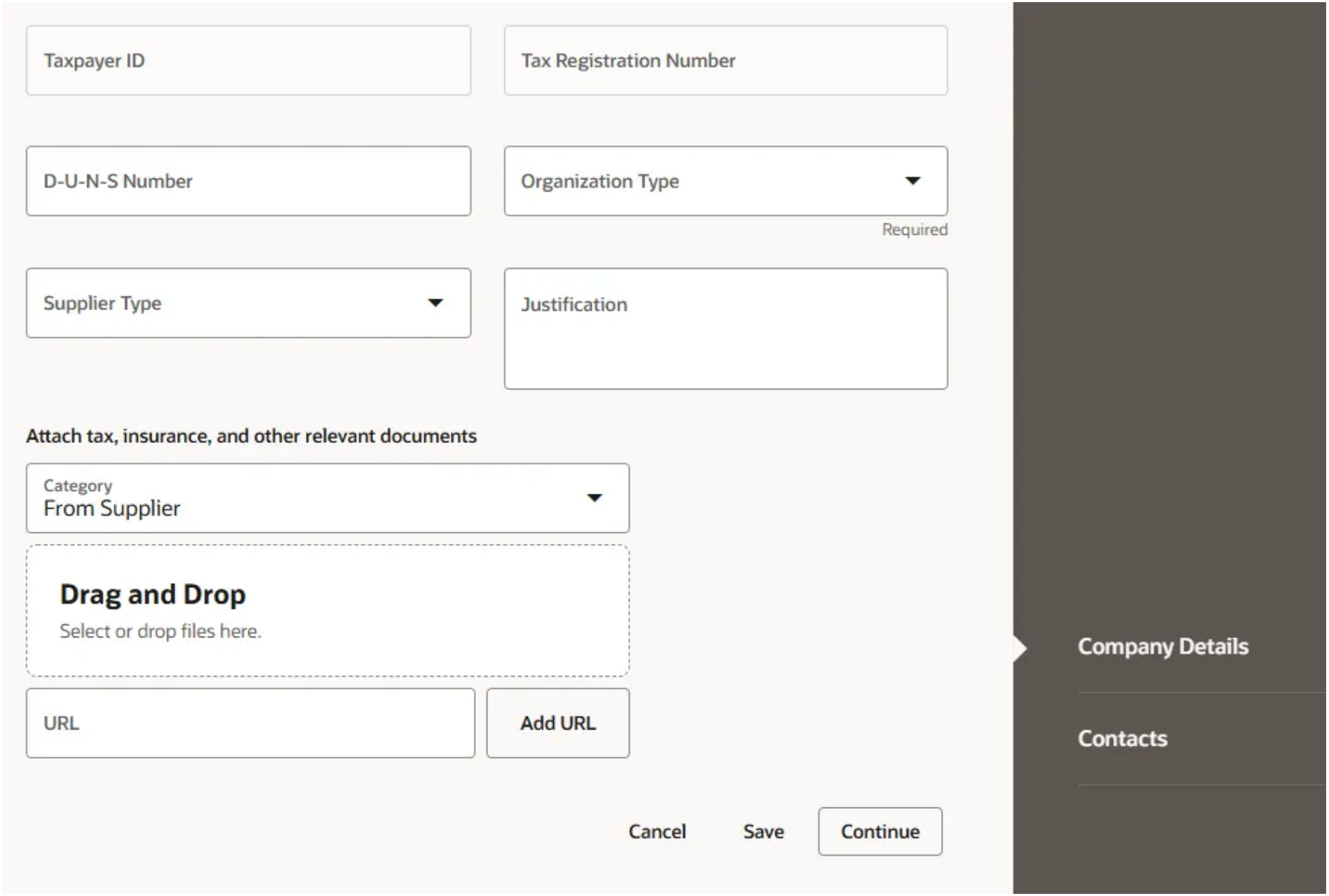
Contacts

Cancel Save Continue

Step 6. Under the **Company Details** section below Justification.

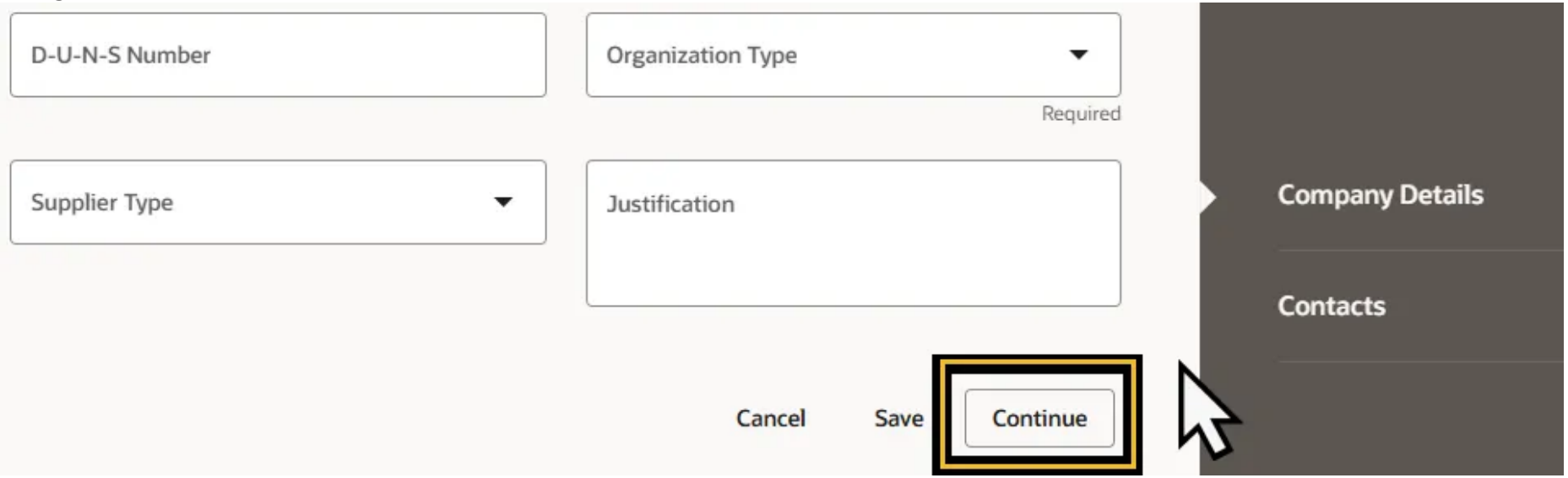
- Select the Category.
- Select the Drag and Drop section to attach tax, insurance, or other relevant documents and W-9.

Image



Step 7. After the **Company Details** are completed and entered select **Continue**.

Image



Step 8. On the **Contacts Page**, enter the contact details.

In **Contact 1**: Enter a value for field marked with Required. Appropriate data must be used. The data below is only an example.

- In this example, enter/choose:
  - *First Name: John
  - *Last Name: Doe
  - *Email: Jdoe1@gmail.com
- Note: Enter appropriate data, the above is an example.

Image

Place company name here

Supplier Registration

Contacts

2 | 2

Contact 1
Enter contact details. Registration communications will be sent to this contact.

First Name
Required

Last Name
Required

Email
Required

Job Title

Country
US

Mobile
+1

Country
US

Phone
+1

Ext

Country
US

Fax
+1

Is this an administrative contact?
Administrative contact will receive general communications from us.
(•) Yes ( ) No

Does this contact need a user account?
User accounts will provide online access to supplier transactions and self-service tasks.
(•) Yes ( ) No

Last updated 2 minutes ago

Cancel Save Submit

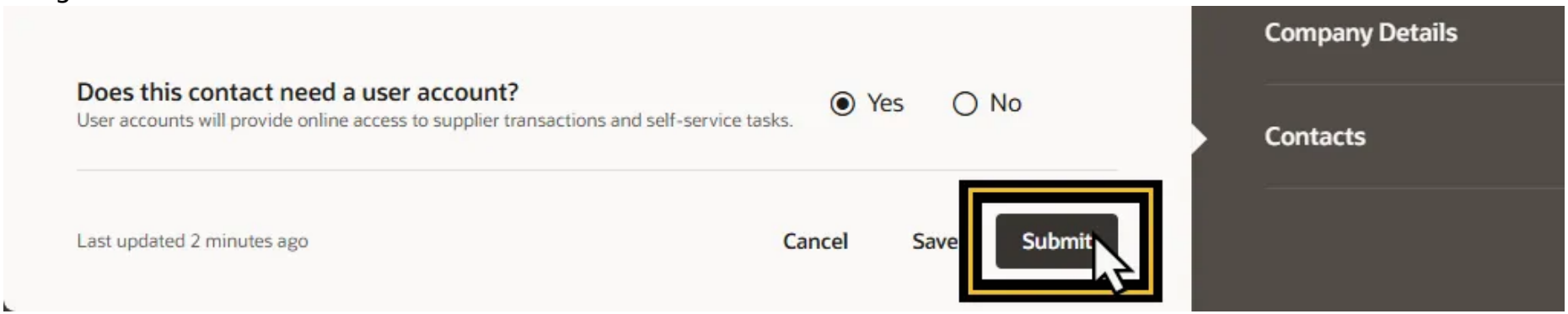
Company Details

Contacts

Step 9. Click the **Add Another Contact**, if applicable.

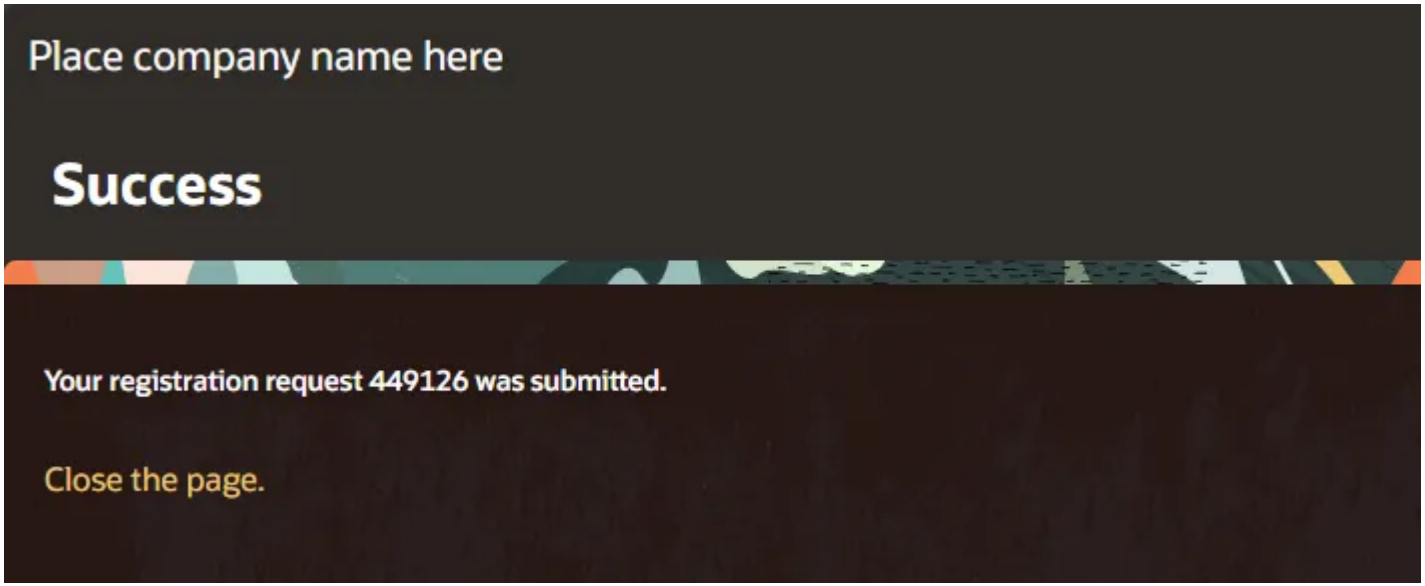
Step 10. Click **Submit**, when finished with the contact information.

Image



Step 11. A *Confirmation* pop-up screen will appear with Success. Once Approved, the Supplier can be used for creating transactions.

Image



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

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