# PO-17 Supplier Registration

## Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to Register and Maintain Suppliers in the North Carolina Financial System (**NCFS**).

## Introduction and Overview

This QRG covers the procedure of registration of suppliers in NCFS which will enable you to Register Supplier.

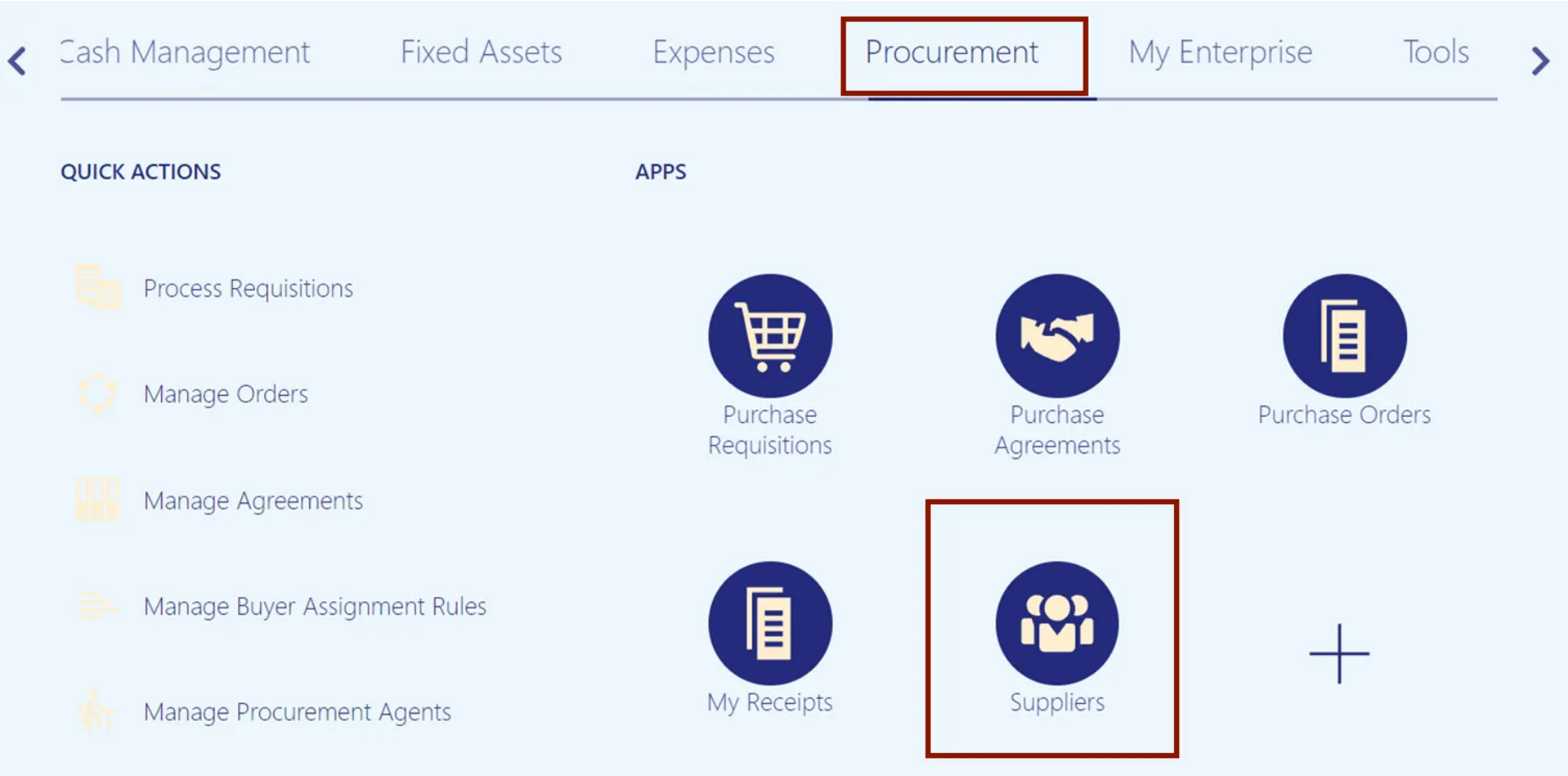
## Create Supplier Profile Manually

To create a supplier profile manually in NCFS, please follow the steps below. There are 17 steps to complete this process.

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

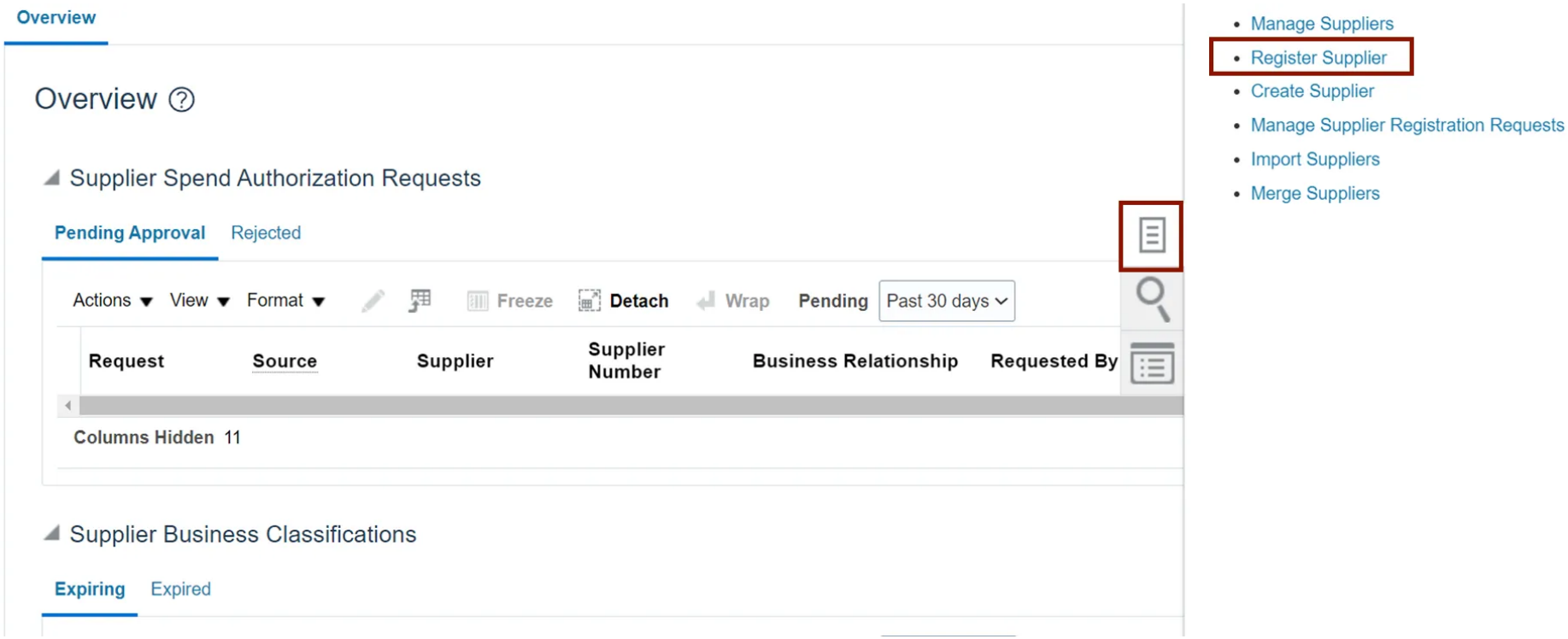
Step 2. On the **Home** page, click the **Procurement** tab, and then click the **Supplier** app.

Image




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

Image




Step 4. The **Supplier Register** page opens in a new internet browser tab.

Image

Place company name here

Supplier Registration

# Company Details

1 | 2

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

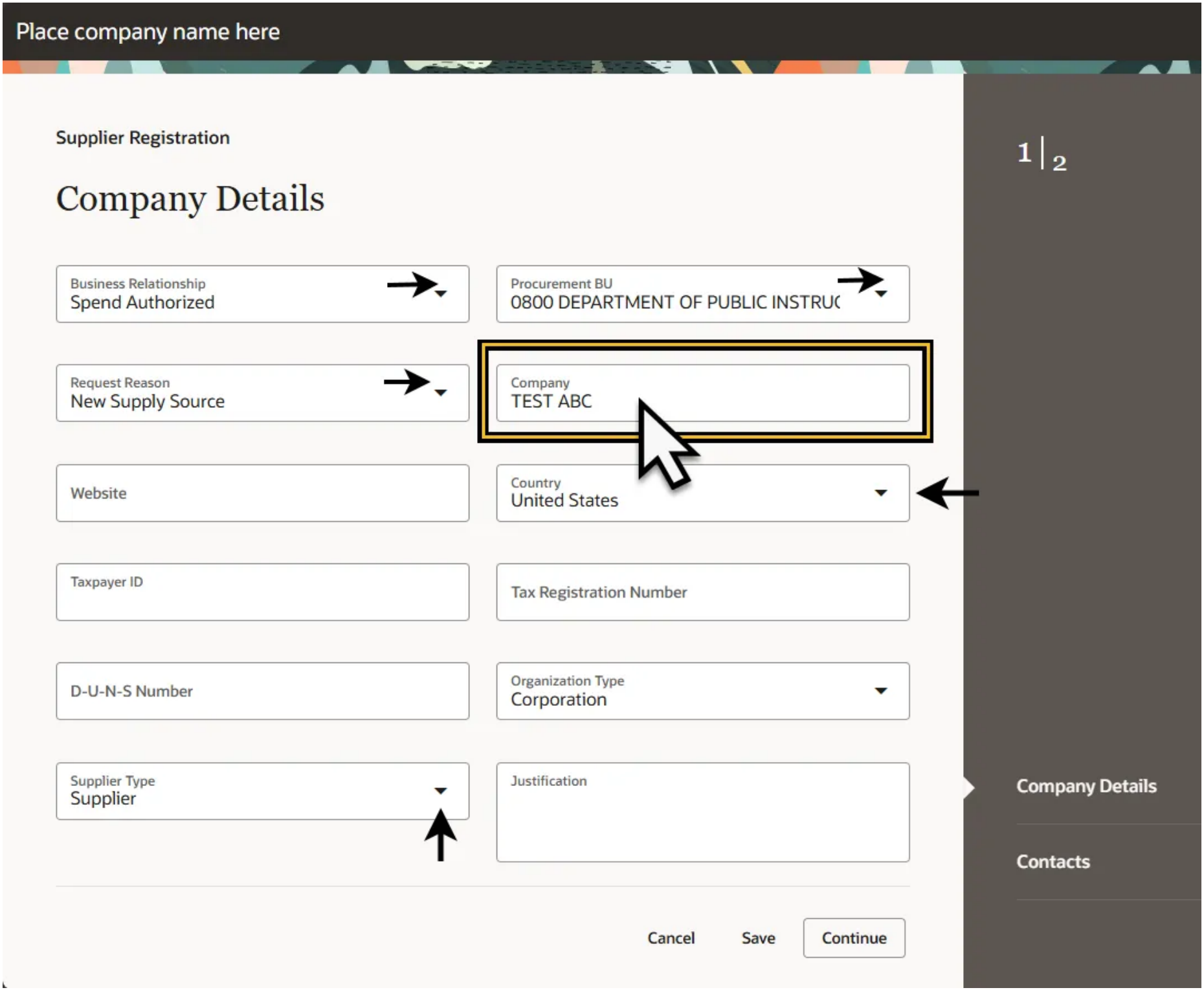
Contacts

Cancel Save Continue

Step 5. In the ***Company Details*** section, enter the required information.

- Business Relationship: Select the Business Relationship
  - Example: Spend Authorized
- Procurement BU: Select the Procurement BU
  - Example: 0800 Department of Public Instruction
- Request Reason: Select the Request Reason
  - Example: New Supply Source
- Company Name: Enter the Company name
  - Example: Test ABC.
- Country: Select the country
  - Example: United States
- Organization Type: Select the organization type from the drop-down list.
  - Example: Corporation
- Supplier Type: Select the supplier type from the drop-down list.

Image


Place company name here
Supplier Registration
Company Details
1 | 2
Business Relationship
Spend Authorized
Procurement BU
0800 DEPARTMENT OF PUBLIC INSTRUC
Request Reason
New Supply Source
Company
TEST ABC
Website
Country
United States
Taxpayer ID
Tax Registration Number
D-U-N-S Number
Organization Type
Corporation
Supplier Type
Supplier
Justification
Company Details
Contacts
Cancel
Save
Continue

Step 6. In the **Company Details** section, you must enter one of the following: **Taxpayer ID, Tax Registration Number**, or **D-U-N-S Number**.

Image

# Company Details

1 | 2

**Some issues need your attention**

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

Business Relationship
Spend Authorized

Procurement BU
0800 DEPARTMENT OF PUBLIC INSTRUC

Request Reason
New Supply Source

Company
TEST ABC

Website

Country
United States

Taxpayer ID

Tax Registration Number

D-U-N-S Number

Organization Type
Corporation

Supplier Type

Justification

Company Details

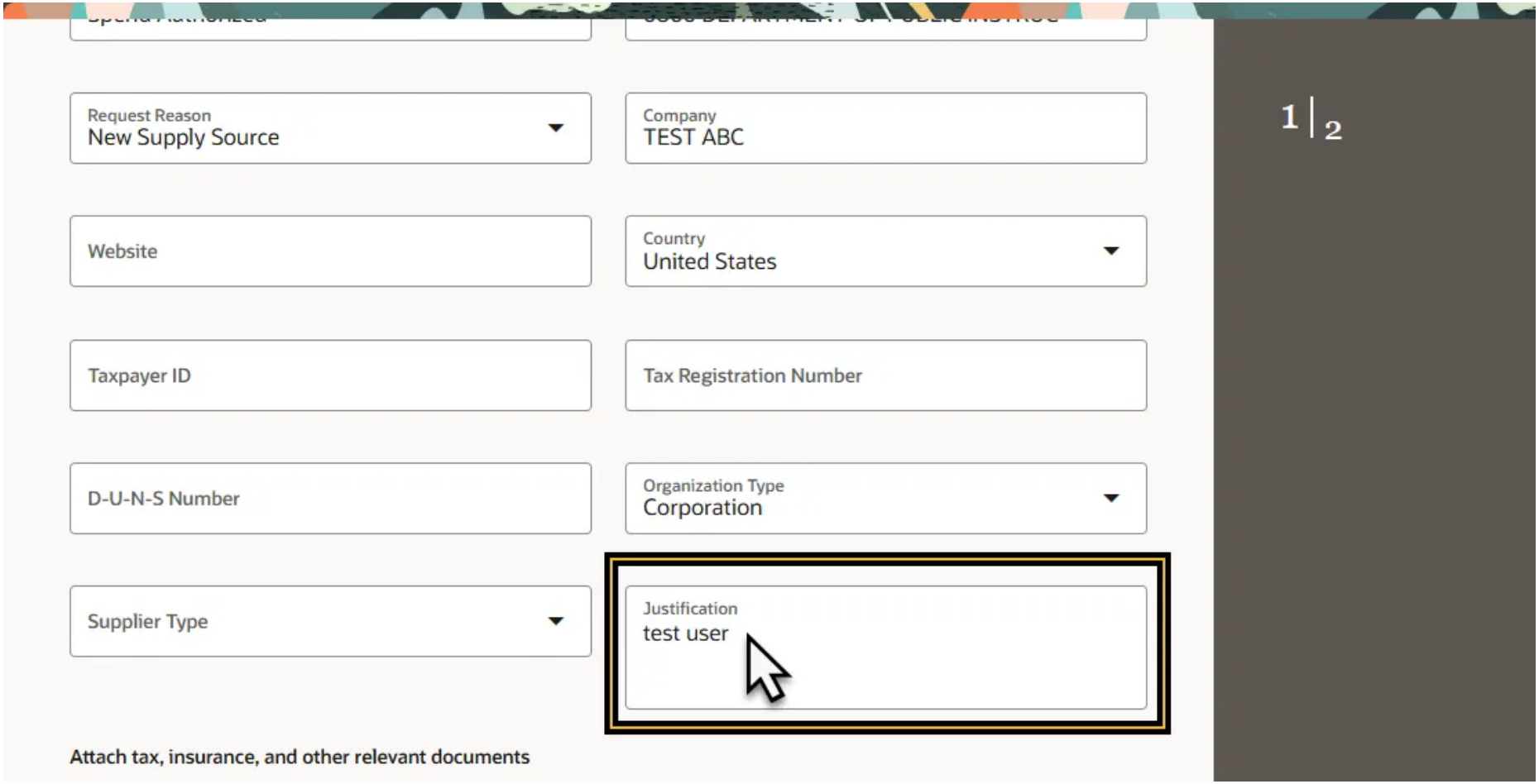
Contacts

Attach tax, insurance, and other relevant documents

Cancel Save Continue

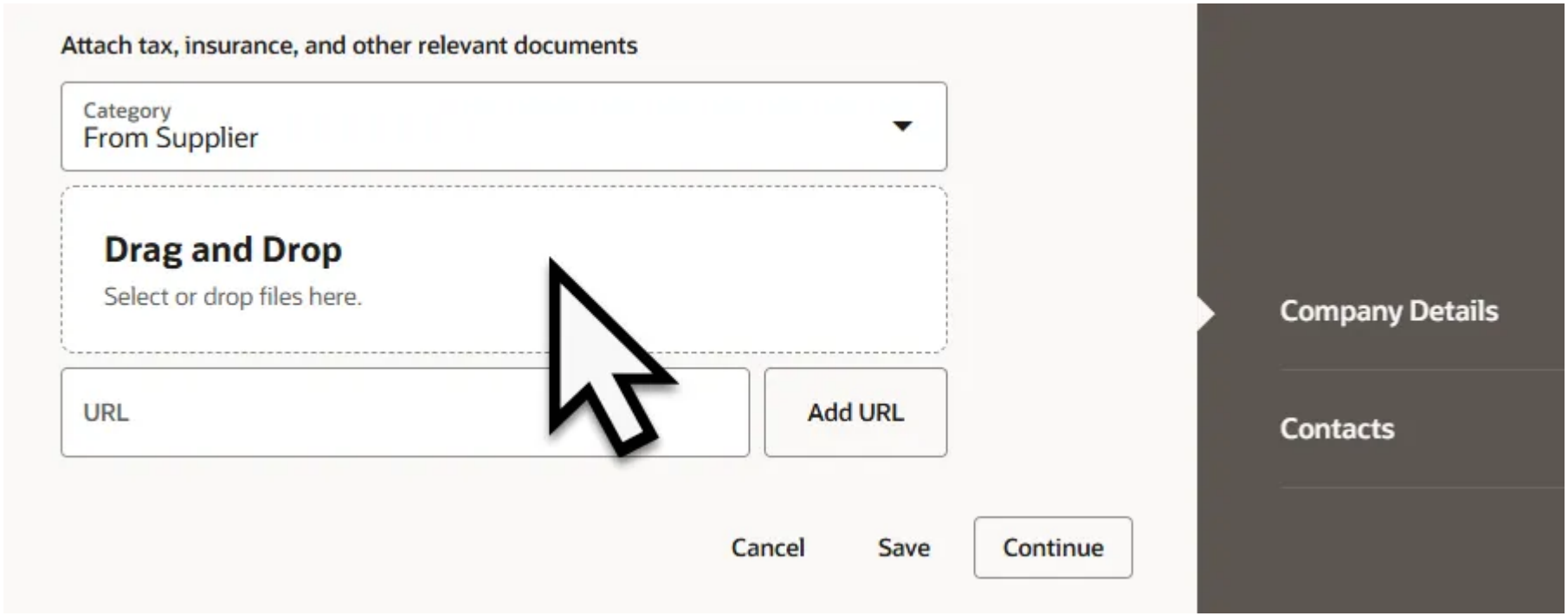
Step 7. In the **Justification** field, enter the justification for the new supplier registration.

Image



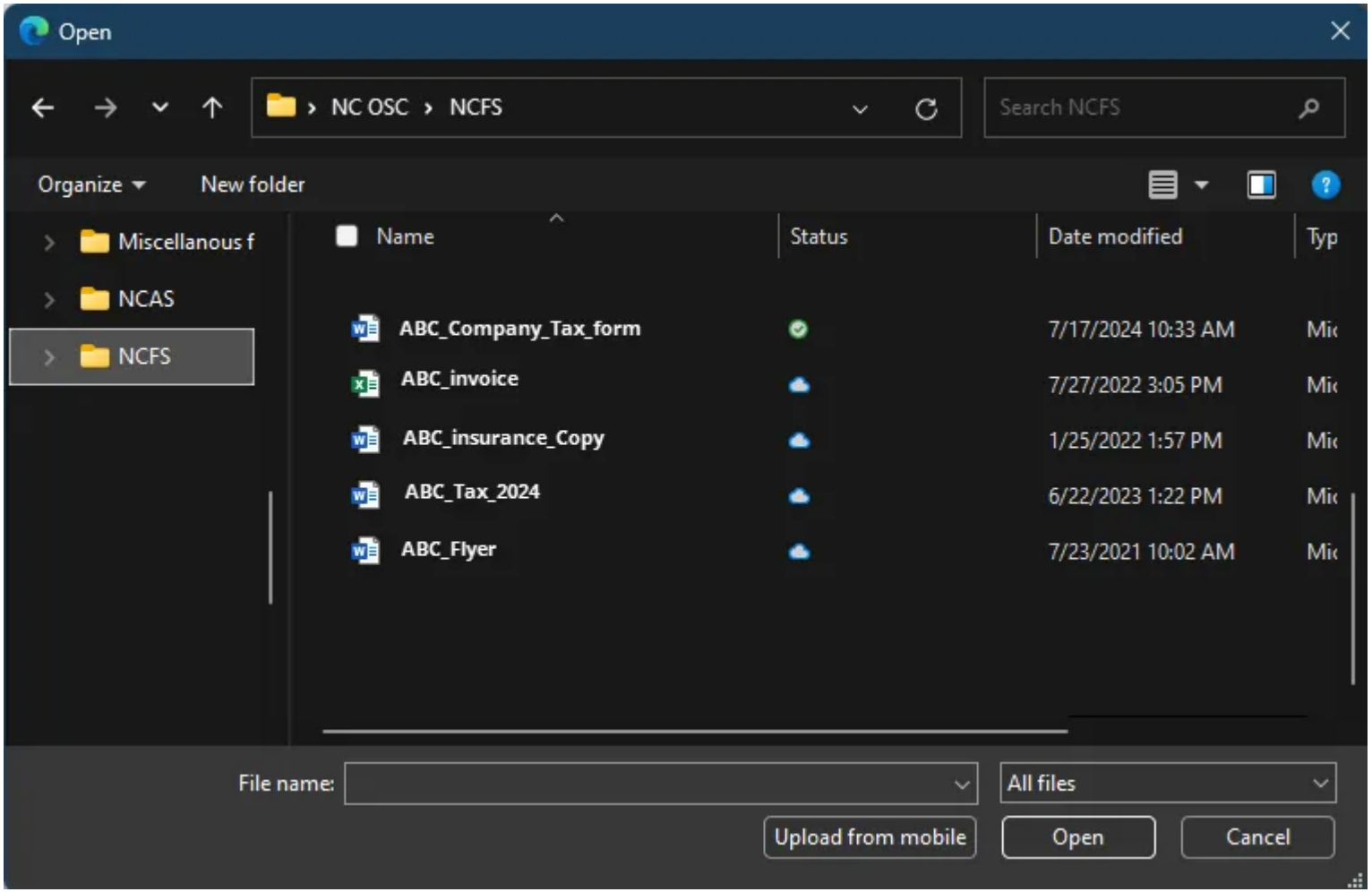

Step 8. Click the **Drag and Drop** field to select files to attach with the new supplier registration. Examples of documents that may be attached are Tax, Insurance, and other relevant documentation.

Image



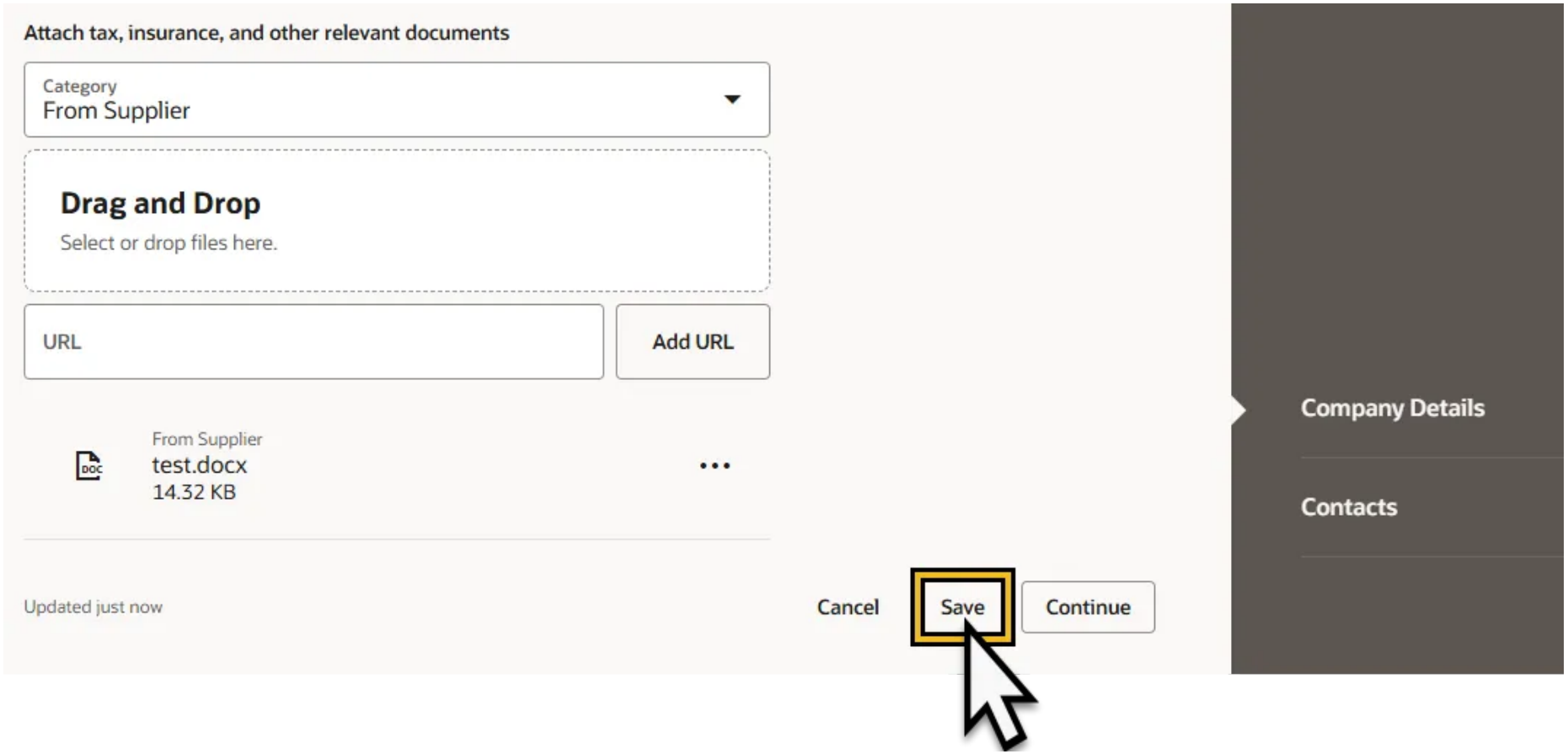

Step 9. In the file explorer navigate to the correct file location and select the files needed to upload into the Supplier Registration.

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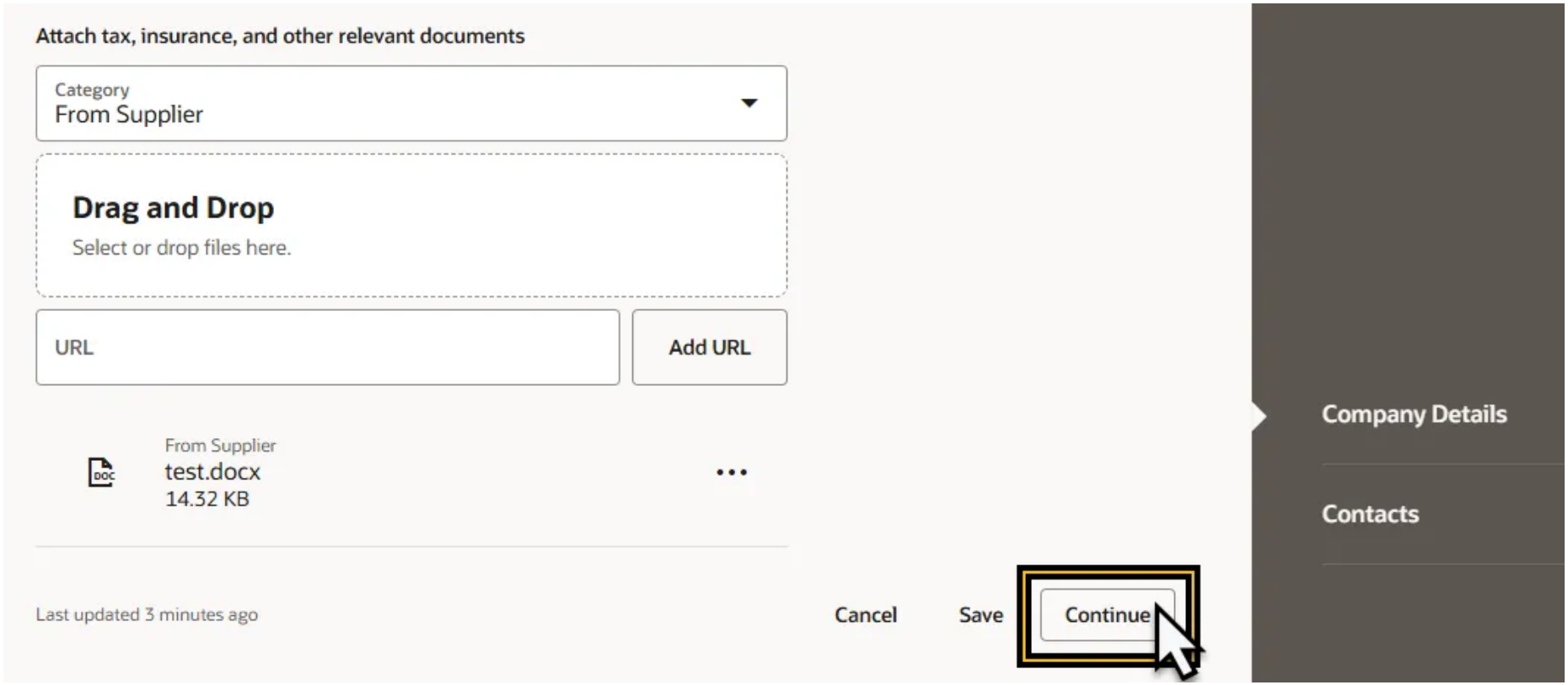

Step 10. Once the **Company Details** have been entered. Click **Save**.

Image




Step 11. Click **Continue**.

Image




Step 12. Enter the required information into the **Contacts** page. The registration communications will be sent to the individual entered in the Contacts details page.

- First Name: Enter the first name of the contact.
- Last Name: Enter the last name of the contact.
- Email: Enter the email address of the contact.
- Contact number: Enter the mobile, phone, and/or fax number for the contact.

Image

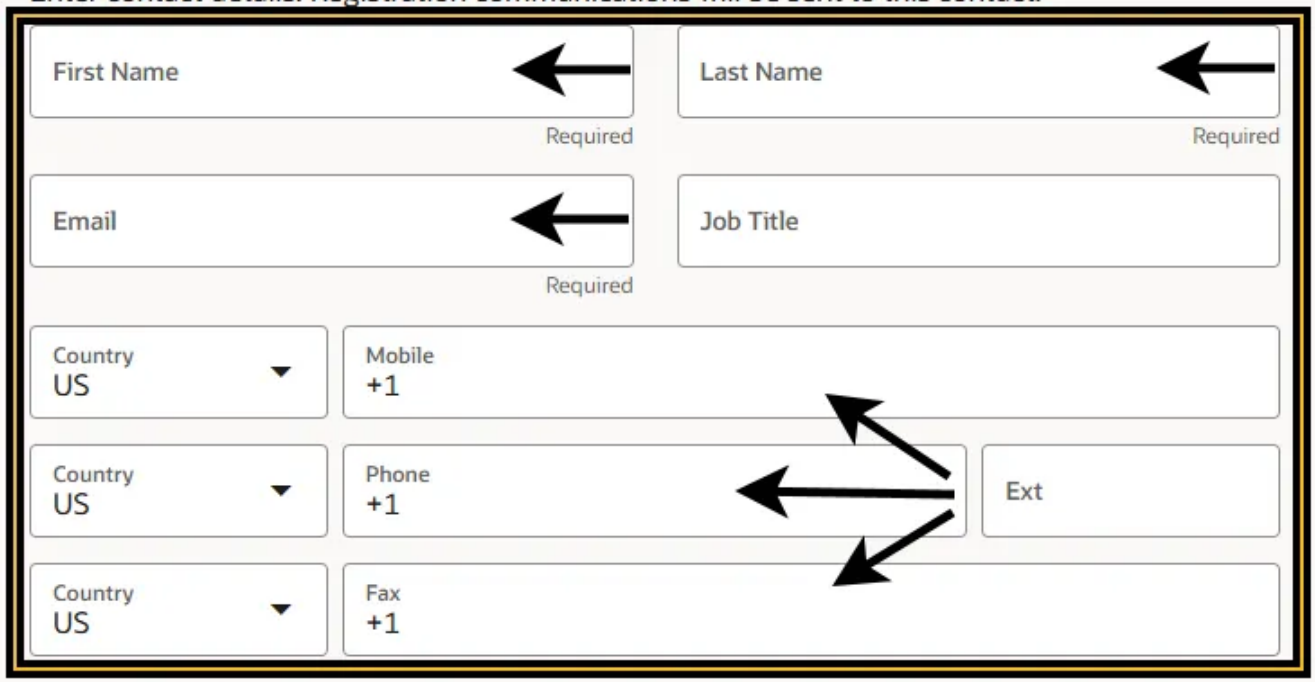
Place company name here

Supplier Registration

# Contacts



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




**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

Company Details
Contacts

Last updated 4 minutes ago

Cancel Save **Submit**

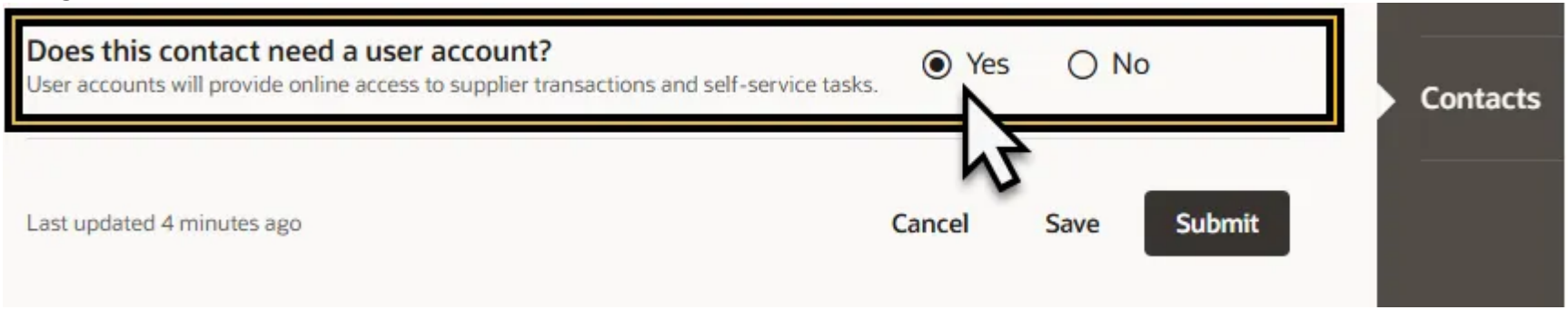
Step 13. Select the **Contact Type**. If the contact is an administrative contact, they will receive general communication information. Select **Yes** if they are an administrative contact select **No** if they are not.

Image




Step 14. Select if the **Contact Needs a User Account**. A user account provides access to supplier transactions and self-service tasks. Select **Yes** if the contact needs a user account, select **No** if the contact does not.

Image




Step 15. Click the **Save** button.

Image

Supplier Registration

# Contacts

2 | 2

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

First Name
John

Last Name
Doe

Email
JDoecorpcfo@newtestcorp.com

Job Title
CFO

Country
US

Mobile
+1 919 555 5555

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

+ Add Another Contact

Company Details

Contacts

Step 16. Click the **Submit** button.

Image

Supplier Registration

# Contacts



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

First Name
John

Last Name
Doe

Email
JDoecorpcfo@newtestcorp.com

Job Title
CFO

Country
US

Mobile
+1 919 555 5555

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.

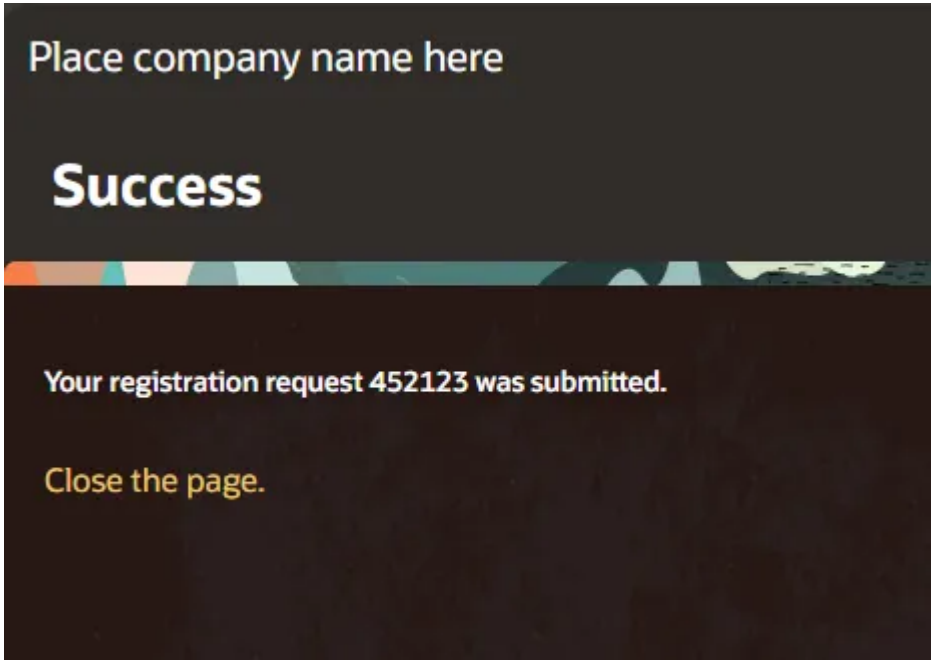
( ) Yes (•) No

+ Add Another Contact

Company Details
Contacts

Step 17.  The Success Conformation page will appear after a successful registration request providing a registration request number.  Click **Close the page**, to return to the Supplier Dashboard.

Image




## Wrap-Up

Register Suppliers using the steps above to register the supplier registration request and update the supplier data elements.

## Additional Resources

- Virtual Instructor-Led Training (vILT)
  - PO104: Supplier Registration

- PO105: Supplier Management

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