



VIEW CUSTOMER TIN

OTC

QUICK REFERENCE GUIDE AR-16

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step explanation of how to View Customer Tax Identification Number (**TIN**) in the North Carolina Financial System (**NCFS**).

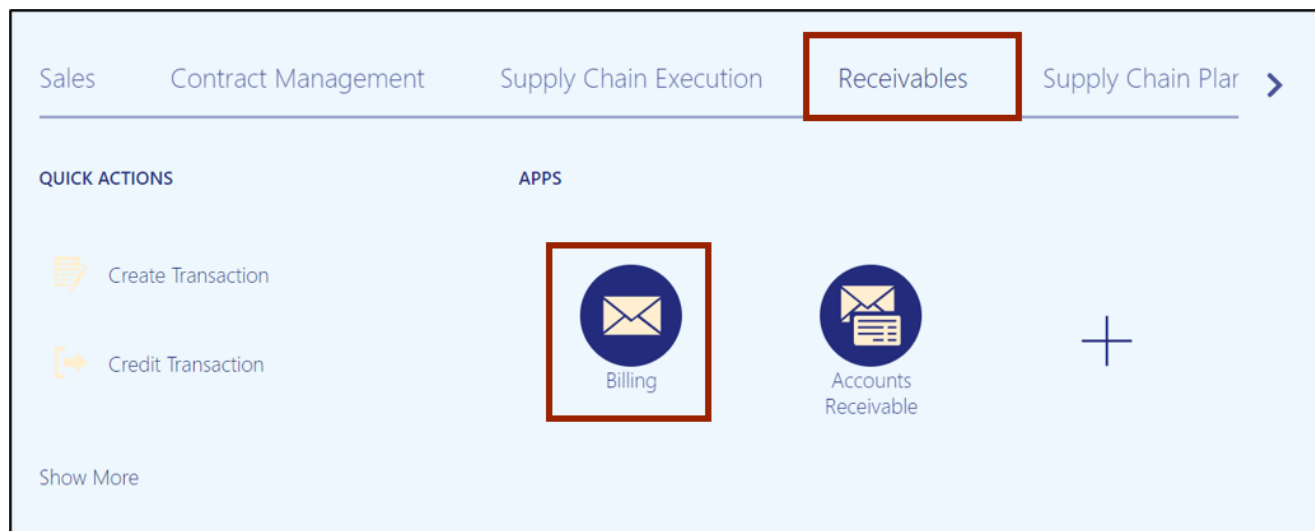
Introduction and Overview


This QRG covers the steps to view customer TIN in NCFS. This process also allows you to view the Customer Party information.

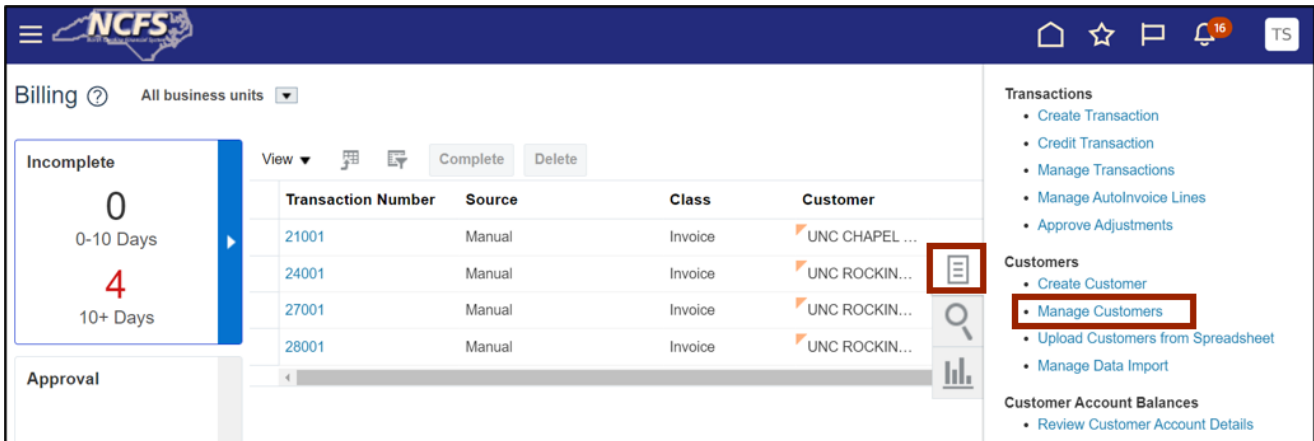
View Customer TIN

To view customer TIN in NCFS, 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 **Receivables** tab and click the **Billing** app.

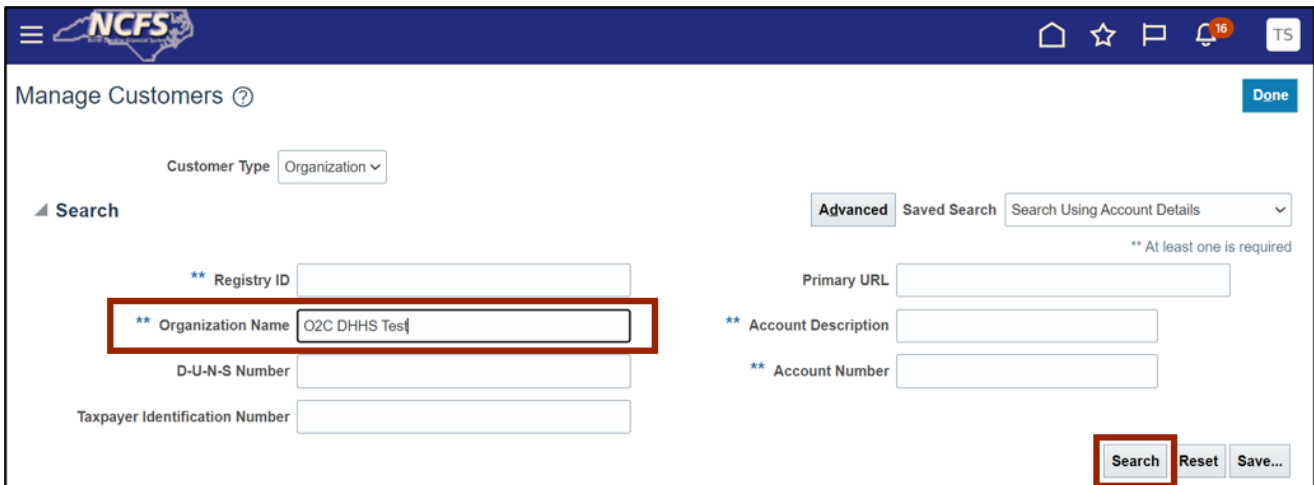


- The **Billing** page appears. On the **Billing** page, click the **Tasks** [] icon and click **Manage Customers** link in the left pane, missing the icon in the parenthesis.



- The **Manage Customers** page opens. On the **Search** section, enter the name of the organization in the **Organization Name** field and click the **Search** button.

In this example, we choose **O2C DHHS Test**.



Note: Optionally, search for the *Taxpayer Identification Number* which is being inquired.

5. Click the **Organization Name**.

In this example, we choose **O2C DHHS Test**.

Manage Customers ? Done

Customer Type

Search Advanced Saved Search Search Using Account Details

Search Results

Actions View Format + Wrap

Registry ID	Organization Name	D-U-N-S Number	Country	Primary Address
97059	O2C DHHS Te...		US	123 SMITH ST,RALEIGHNC,27613,DURHAM,US

Columns Hidden 5

6. The **Edit Customer** page opens. On the **Edit Customer** page, review the Customer Party information.

Edit Customer: O2C DHHS Test Customer ? Save Save and Close Cancel

Organization Information

* Name D-U-N-S Number

Registry ID 97059 Taxpayer Identification Number

Relationships Tax Profile

Actions View Format + X Wrap

Related Name	Registry ID	Relationship	From Date	To Date
aplnjayjbc y aaaaaranfqd	97079	Person who is a contact for an...	12/6/22	
John Smith	190058	Person who is a contact for an...	5/22/23	

Columns Hidden 1 Relationships date range: Current

7. View the Customer TIN on the *Taxpayer Identification Number* field.

Edit Customer: O2C DHHS Test Customer ? Save Save and Close Cancel

Organization Information

* Name D-U-N-S Number

Registry ID 97059 Taxpayer Identification Number

Relationships Tax Profile

Actions ▾ View ▾ Format ▾ + ✎ ✕ ↶ Wrap

Related Name	Registry ID	Relationship	From Date	To Date
apInjayjbc y aaaaranfqd	97079	Person who is a contact for an...	12/6/22	
John Smith	190058	Person who is a contact for an...	5/22/23	

Columns Hidden 1 Relationships date range: Current

8. Click the **Save and Close** button after reviewing.

Edit Customer: O2C DHHS Test Customer ? Save Save and Close Cancel

Organization Information

* Name D-U-N-S Number

Registry ID 97059 Taxpayer Identification Number

Relationships Tax Profile

Actions ▾ View ▾ Format ▾ + ✎ ✕ ↶ Wrap

Related Name	Registry ID	Relationship	From Date	To Date
apInjayjbc y aaaaranfqd	97079	Person who is a contact for an...	12/6/22	
John Smith	190058	Person who is a contact for an...	5/22/23	

Columns Hidden 1 Relationships date range: Current

- You are now redirected to the **Manage Customers** page. On the **Manage Customers** page, click the **Done** button.

The screenshot shows the 'Manage Customers' interface. At the top right, there is a 'Done' button highlighted with a red box. Below the header, there is a 'Customer Type' dropdown menu set to 'Organization'. A search bar is present with an 'Advanced' button and a 'Saved Search' dropdown menu. The search results are displayed in a table with the following columns: Registry ID, Organization Name, D-U-N-S Number, Country, and Primary Address. One result is shown with Registry ID 97059, Organization Name O2C DHHS Te..., D-U-N-S Number, Country US, and Primary Address 123 SMITH ST, RALEIGHNC, 27613, DURHAM, US. At the bottom left of the table, it says 'Columns Hidden 5'.

Registry ID	Organization Name	D-U-N-S Number	Country	Primary Address
97059	O2C DHHS Te...		US	123 SMITH ST, RALEIGHNC, 27613, DURHAM, US

Note: You are now redirected to the Billing page

Wrap-Up

View customer TIN using the steps above.

Additional Resources

Virtual Instructor-Led Training (vILT)

- AR100: Customer Maintenance