

AP-23 Update Suppliers

Purpose

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

Introduction and Overview

This QRG covers the maintenance of suppliers in NCFS, which will enable you to Update different Supplier data elements.

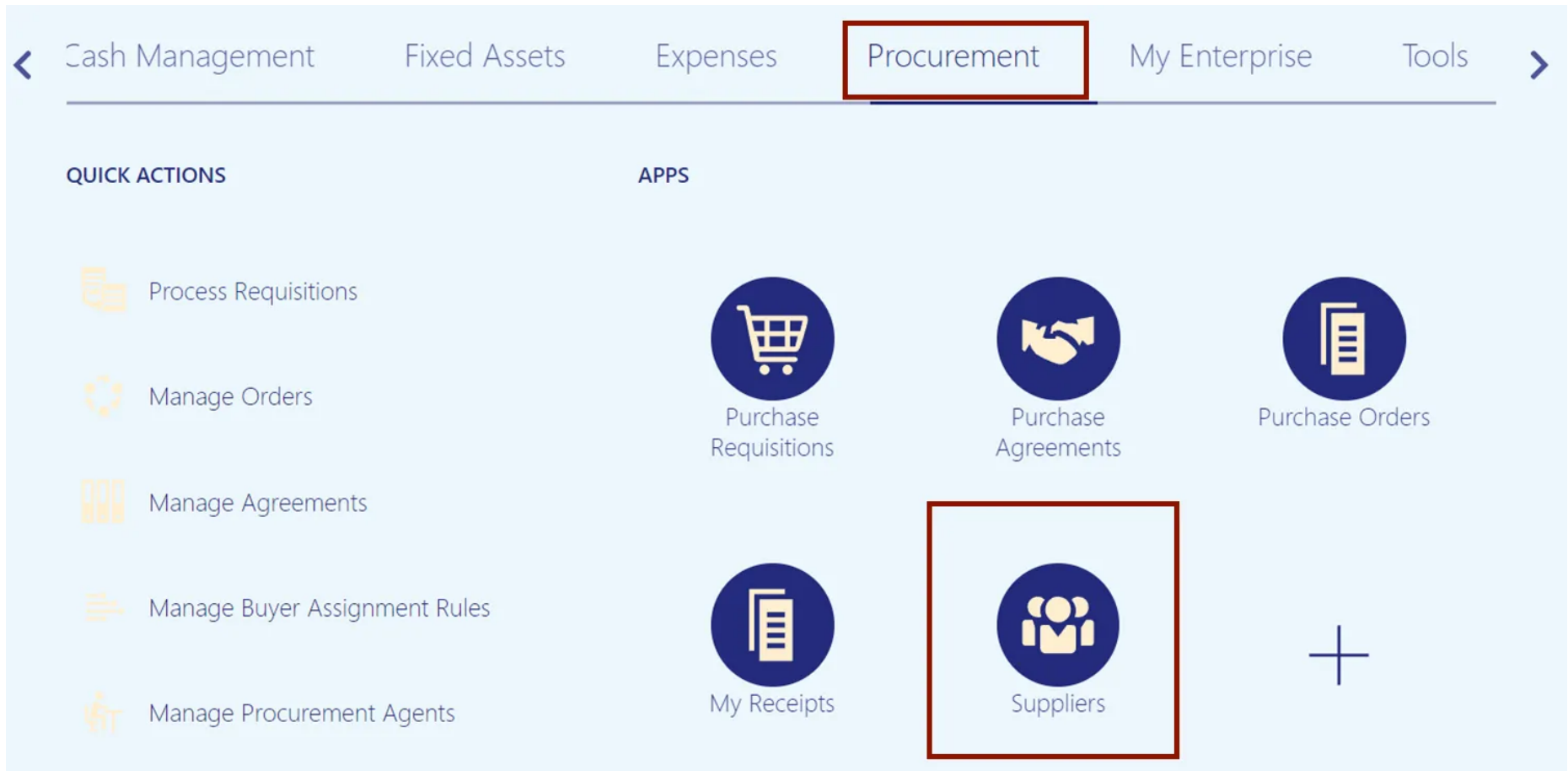
Update the Supplier

To update the supplier data elements in NCFS, please follow the steps below. There are 21 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 click **Manage Supplier**.

Image

Overview ?

Supplier Spend Authorization Requests

[Pending Approval](#) [Rejected](#)Actions ▼ View ▼ Format ▼   Freeze  Detach  Wrap Pending

Request	Source	Supplier	Supplier Number	Business Relationship	Requested By
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Columns Hidden 11

Supplier Business Classifications

[Expiring](#) [Expired](#)

- [Manage Suppliers](#)
- [Register Supplier](#)
- [Create Supplier](#)
- [Manage Supplier Registration Requests](#)
- [Import Suppliers](#)
- [Merge Suppliers](#)

Step 4. Enter the keywords in the **Keywords** field.

In this example, we choose **Kronos**. Click the **Search** button.

Image

Manage Suppliers ?

Done

Search

Advanced

Manage Watchlist

Saved Search

All Suppliers v

* Required

* Keywords kronos

Search

Reset

Save...

Step 5. The **Supplier** is displayed in the **Search Results** section.

Image

Manage Suppliers ?

Done

Search

Advanced

Manage Watchlist

Saved Search

All Suppliers v

* Required

* Keywords kronos

Search

Reset

Save...

Search Results

Actions v View v Format v + Freeze Detach Wrap Register Supplier

Supplier	Supplier Number	Alternate Name	Business Relationship	Parent Supplier	Creation Date	Inactive Since	Tax Registration Number	Taxpayer ID	D-U-N-S Number
KRONOS INC	100250	KRONOS INC	Spend Authorized		11/10/22			72765700394	

Step 6. Click the **Edit** icon.

Image

OverviewManage Suppliers x

Manage Suppliers ?

Done

Search

AdvancedManage WatchlistSaved SearchAll Suppliers v

* Keywordskronos

* Required

SearchResetSave...

Search Results

Actions vView vFormat v+

Freeze

Detach

Wrap

Register Supplier

Supplier	Supplier Number	Alternate Name	Business Relationship	Parent Supplier	Creation Date	Inactive Since	Tax Registration Number	Taxpayer ID	D-U-N-S Number
KRONOS INC	100250	KRONOS INC	Spend Authorized		11/10/22			72765700394	

Step 7. Click the **Profile** tab and make edits to the **Supplier** if required.

Image

Edit Supplier: KRONOS INC ? ★

Save Save and Close Cancel

Profile Addresses Sites Contacts Qualifications

General

* Supplier

Supplier Number

Alternate Name

Tax Organization Type

Supplier Type

Inactive Date

Status

Business Relationship

Parent Supplier

Parent Supplier Number

Creation Date

Creation Source

Registration Request

Attachments

Additional Information

Attribute Value

Tax Expiration Date

TIN Confirmation Type

TIN Document Type

EVP Customer Number

LAST_MODIFIED

TC_ACCEPTED_DATE

Source

Step 8. Click the **Addresses** tab.

Image

Overview Manage Suppliers x **Supplier: KRONOS INC** x

Edit Supplier: KRONOS INC ? ★

Save Save and Close Cancel

Profile **Addresses** Sites Contacts Qualifications

Actions View Format + ✎ 🗑️ Freeze Wrap Status Active ▾

Address Name	Address	Phone	Address Purpose	Status
GA.30374.02	PO BOX 743208,ATLANTAGA,303743208,FULTON,US	+1 (978) 244-6372	Remit to	Active
MA.01824.01	123 MAIN ST,RALEIGHNC,276094119,WAKE,US		Ordering	Active

Step 9. Click the **Edit** icon.

Image

Overview Manage Suppliers x **Supplier: KRONOS INC** x

Edit Supplier: KRONOS INC ? ★

Save Save and Close Cancel

Profile **Addresses** Sites Contacts Qualifications

Actions View Format + **✎** 🗑️ Freeze Wrap Status Active ▾

Address Name	Address	Phone	Address Purpose	Status
GA.30374.02	PO BOX 743208,ATLANTAGA,303743208,FULTON,US	+1 (978) 244-6372	Remit to	Active
MA.01824.01	123 MAIN ST,RALEIGHNC,276094119,WAKE,US		Ordering	Active

Step 10. Edit the **Address** section if required and click the **Save and Close** button.

Image

Edit Address: GA.30374.02 ?

Save
Save and Close
Cancel

* Address Name

GA.30374.02

* Country

United States ▼

* Address Line 1

PO BOX 743208

Address Line 2

Address Line 3

Address Line 4

* City

ATLANTA ▼

* State

GA ▼

* Zip Code

30374 ▼

Zip Code Extension

3208

* County

Fulton ▼

Language

▼

* Address Purpose

☐ Ordering
☒ Remit to
☐ RFQ or Bidding

Phone

1 ▼

978

2446372

Fax

▼

Email

Inactive Date

m/d/yy

Status

Active

Step 11. Click the **Sites** tab.

Image

Edit Supplier: KRONOS INC ? ★

Save Save and Close Cancel

Profile Addresses **Sites** Contacts Qualifications

Actions View Format +  Freeze Detach Wrap Status Active

Procurement BU	Site	Address	Site Purpose	Alternate Pay Site	Attachments	Status
3000 DHHS ME...	O.30PT.01	123 MAIN ST,RALEIGHNC,276094119,WAKE,US	Purchasing		None	Active
3000 DHHS ME...	R.30PT.01	PO BOX 743208,ATLANTAGA,303743208,FULTON,US	Pay		None	Active

Step 12. Click the **Edit** icon.

Image

Edit Supplier: KRONOS INC ? ★

Save Save and Close Cancel

Profile Addresses **Sites** Contacts Qualifications

Actions View Format +  Freeze Detach Wrap Status Active

Procurement BU	Site	Address	Site Purpose	Alternate Pay Site	Attachments	Status
3000 DHHS ME...	O.30PT.01	123 MAIN ST,RALEIGHNC,276094119,WAKE,US	Purchasing		None	Active
3000 DHHS ME...	R.30PT.01	PO BOX 743208,ATLANTAGA,303743208,FULTON,US	Pay		None	Active

Step 13. Edit the **Supplier Site** if required.

Image

Overview Manage Suppliers x **Supplier: KRONOS INC** x

Edit Site: O.30PT.01 ?

Procurement BU 3000 DHHS MENTAL HEALTH

Address Name MA.01824.01

Address 123 MAIN ST,RALEIGHNC,276094119,WAKE,US

* Site O.30PT.01

Inactive Date m/d/yy

Status Active

* Site Purpose

☐ Sourcing only

☒ Purchasing

☐ Procurement card

☐ Pay

☐ Primary pay

Attachments None +

Additional Information

Attribute Value ADDITIONAL INFO

EVP Group Number 6260-A

NCAS Group Number

General Purchasing Receiving Invoicing Payments Site Assignments Qualifications

Identification

☐ Income tax reporting site

Customer Number

Save

Save and Close

Cancel

Step 14. Click the **Save and Close** button.

Image

Edit Site: O.30PT.01 ?

Save

Save and Close

Cancel

Procurement BU 3000 DHHS MENTAL HEALTH

Address Name MA.01824.01

Address 123 MAIN ST,RALEIGHNC,276094119,WAKE,US

* Site O.30PT.01

Inactive Date m/d/yy

Status Active

* Site Purpose ☐ Sourcing only

☒ Purchasing

☐ Procurement card

☐ Pay

☐ Primary pay

Attachments None +

Additional Information

Attribute Value ADDITIONAL INFO v

EVP Group Number 6260-A

NCAS Group Number



Step 15. Click the **Contacts** tab.

Image

Overview Manage Suppliers x **Supplier: KRONOS INC** x

Edit Supplier: KRONOS INC ? ★

Save Save and Close Cancel

Last Saved 5/11/23 9:25 AM

Profile Addresses Sites **Contacts** Qualifications

Actions View Format + [Edit icon] [Print icon] Freeze Detach Wrap Status Active

Name	Job Title	Email	Administrative Contact	User Account	Status
aaqnaxetd, aaagalhrd			—	—	Active
awrwpacevd, ajpciazkgc	Business Analyst	sendmail-test-discard+3000000972...	—	—	Active

Columns Hidden 8

Step 16. Click the **Edit** icon.

Image

Overview Manage Suppliers x **Supplier: KRONOS INC** x

Edit Supplier: KRONOS INC ? ★

Save Save and Close Cancel

Last Saved 5/11/23 9:25 AM

Profile Addresses Sites **Contacts** Qualifications

Actions View Format + [Edit icon] [Print icon] Freeze Detach Wrap Status Active

Name	Job Title	Email	Administrative Contact	User Account	Status
aaqnaxetd, aaagalhrd			—	—	Active
awrwpacevd, ajpciazkgc	Business Analyst	sendmail-test-discard+3000000972...	—	—	Active

Columns Hidden 8

Step 17. Edit the **Contact information** if required.

Image

Edit Contact: aaaagalhrd y aaqnaxetd ?

Save
Save and Close
Cancel

Salutation

▼

* First Name

aaaagalhrd

Middle Name

* Last Name

aaqnaxetd

Job Title

☐ Administrative contact

Phone

1

▼

978

2446372

Mobile

Fax

▼

Email

Status

Active

▼

Additional Information

Enter Person Information

▼

Contact Addresses

Actions ▼
View ▼
Format ▼

✕

📄

🔒 Freeze

📄 Detach

↶ Wrap

Address Name	Address	Phone	Address Purpose	Status
GA.30374.02	PO BOX 743208,ATLANTAGA,303743208,FULTON,US	+1 (978) 244-6372	Remit to	Active

Step 18. Click the **Save and Close** button.

Image

Edit Contact: aaaagalhrd y aaaqnaxetd ?

Save

Save and Close

Cancel

Salutation

* First Name

Middle Name

* Last Name

Job Title

☐ Administrative contact

Phone

Mobile

Fax

Email

Status

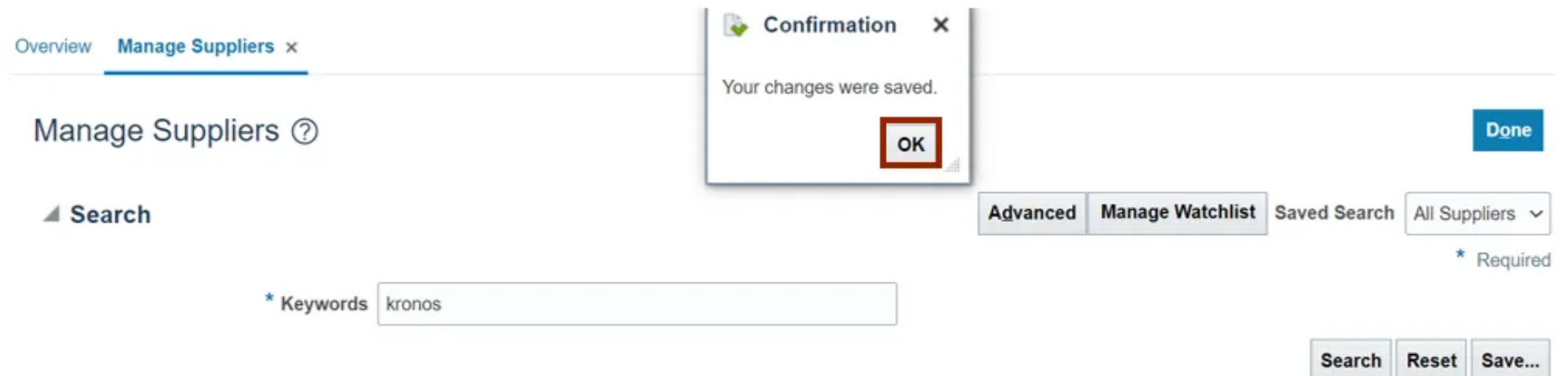
Additional Information

Enter Person Information



Step 19. The **Confirmation** pop-up appears. Click the **OK** button.

Image



Step 20. Click the **Done** button.

Image



Step 21. The **Overview** dashboard displays.

Image

Overview

Overview ?

Refresh

Supplier Spend Authorization Requests

Pending Approval

Rejected

Actions

View

Format

Freeze

Detach

Wrap

Pending

Past 30 days

Request	Source	Supplier	Supplier Number	Business Relationship	Requested By	Request Date	Days Pending
5001	Registration - Int...	New Company	150017	None	OVERLY, SAU...	4/18/23	23
5002	Registration - Int...	New	150018	None	OVERLY, SAU...	4/25/23	16
5003	Registration - Int...	ABCX	150019	None	OVERLY, SAU...	4/25/23	16
5004	Registration - Int...	ABCZ	150020	None	OVERLY, SAU...	4/25/23	16
5005	Registration - Int...	CBD	150021	None	OVERLY, SAU...	4/25/23	16

Columns Hidden 11

Supplier Business Classifications

Expiring

Expired

Actions

View

Format

Freeze

Detach

Wrap

Expiring

Next 30 days

Supplier	Supplier Number	Business Classification	Subclassification	Certificate	Expiration Date	Days to Expiration
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Wrap-Up

Create and manage suppliers using the steps above to update 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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