

AR-16 View Customer TIN

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.

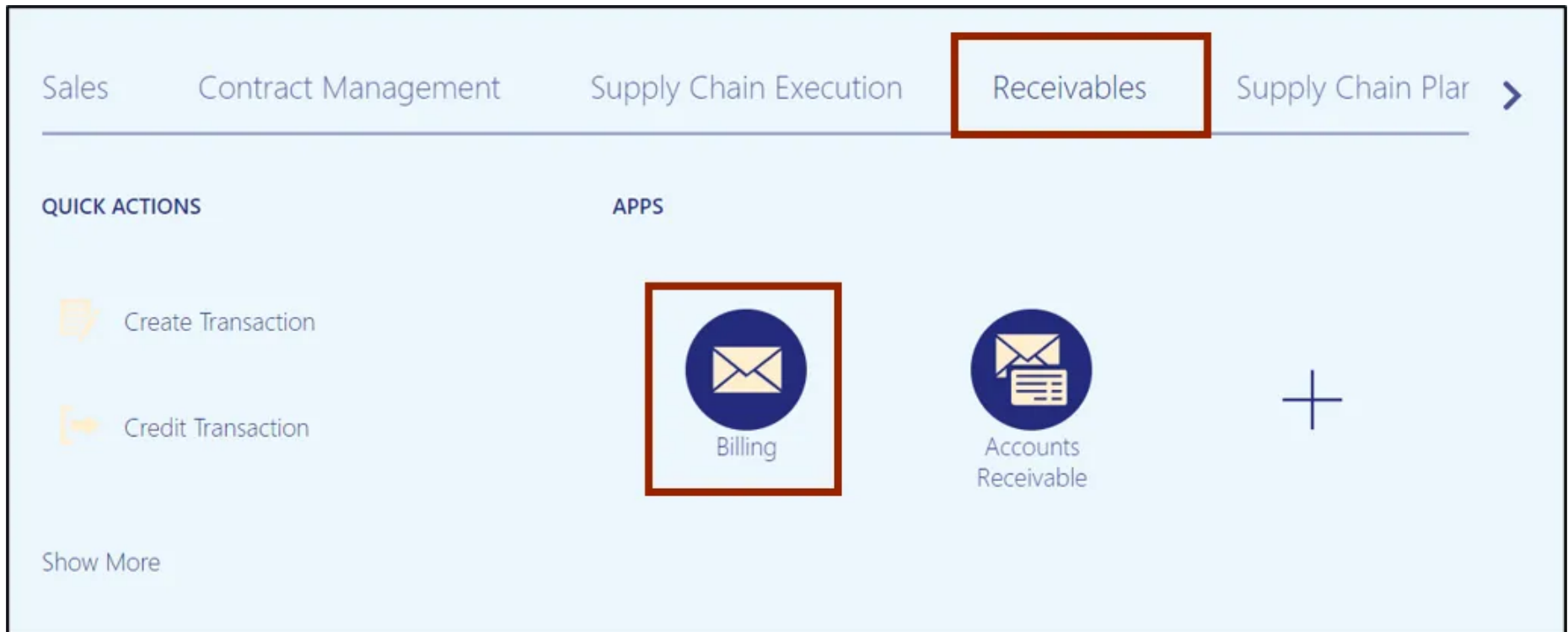
View Customer TIN

To view customer TIN in NCFS, please follow the steps below. There are 9 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 **Manage Customers** link in the left pane, missing the icon in the parenthesis.

Image

Billing ? All business units ▾

Incomplete

0
0-10 Days

4
10+ Days

Approval

View ▾ [Icons] [Complete] [Delete]

Transaction Number	Source	Class	Customer
21001	Manual	Invoice	UNC CHAPEL ...
24001	Manual	Invoice	UNC ROCKIN...
27001	Manual	Invoice	UNC ROCKIN...
28001	Manual	Invoice	UNC ROCKIN...

Transactions

- Create Transaction
- Credit Transaction
- Manage Transactions
- Manage AutoInvoice Lines
- Approve Adjustments

Customers

- Create Customer
- Manage Customers**
- Upload Customers from Spreadsheet
- Manage Data Import

Customer Account Balances

- Review Customer Account Details

Step 4. 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.

Image

NCFS

North Carolina Financial Services

Home

Star

Flag

16

TS

Manage Customers ?

Done

Customer Type Organization

Search

Advanced Saved Search Search Using Account Details

** At least one is required

** Registry ID

** Organization Name

O2C DHHS Test

D-U-N-S Number

Taxpayer Identification Number

Primary URL

** Account Description

** Account Number

Search

Reset

Save...

Step 5. Click the **Organization Name**.

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

Image

Manage Customers ?

Customer Type Organization

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

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

Image

Edit Customer: O2C DHHS Test Customer

Save
Save and Close
Cancel

Organization Information

* Name
O2C DHHS Test Customer

Registry ID
97059

D-U-N-S Number

Taxpayer Identification Number
879645

Relationships
Tax Profile

Actions
View
Format
+
✎
✕
Wrap

	Related Name	Registry ID	Relationship	From Date	To Date
▶	aplnjayjbc 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

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

Image

Edit Customer: O2C DHHS Test Customer ?

Save

Save and Close

Cancel

Organization Information

* Name

O2C DHHS Test Customer

Registry ID

97059

D-U-N-S Number

Taxpayer Identification Number

879645

Relationships

Tax Profile

Actions ▾ View ▾ Format ▾ + ✎ ✕ ↶ Wrap

	Related Name	Registry ID	Relationship	From Date	To Date
▶	aplnjayjbc 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

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

Image

Edit Customer: O2C DHHS Test Customer ?

Save

Save and Close

Cancel

Organization Information

* Name

O2C DHHS Test Customer

Registry ID

97059

D-U-N-S Number

Taxpayer Identification Number

879645

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

Step 9. You are now redirected to the **Manage Customers** page. On the **Manage Customers** page, click the **Done** button.

Image

Manage Customers ?

Done

Customer Type Organization

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

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](#)

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