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.

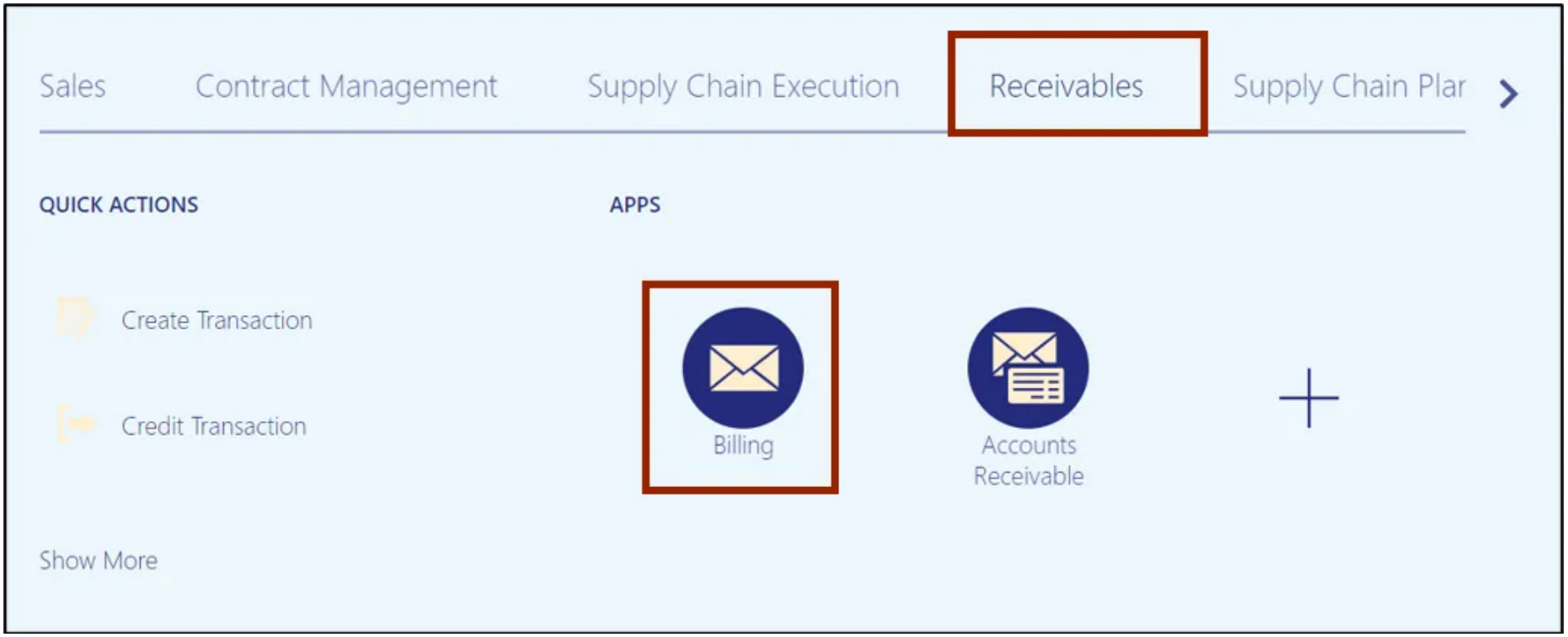
View Customer TIN

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.

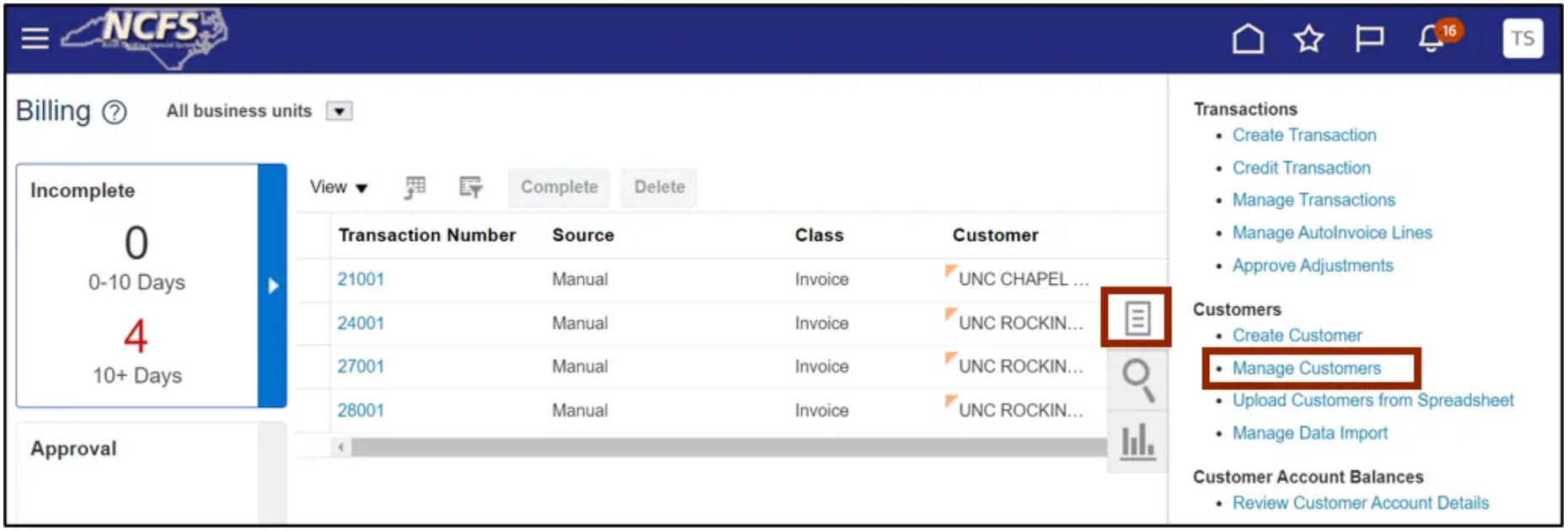
Step 2. On the **Home** page, click the **Receivables** tab and click the **Billing** app.

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

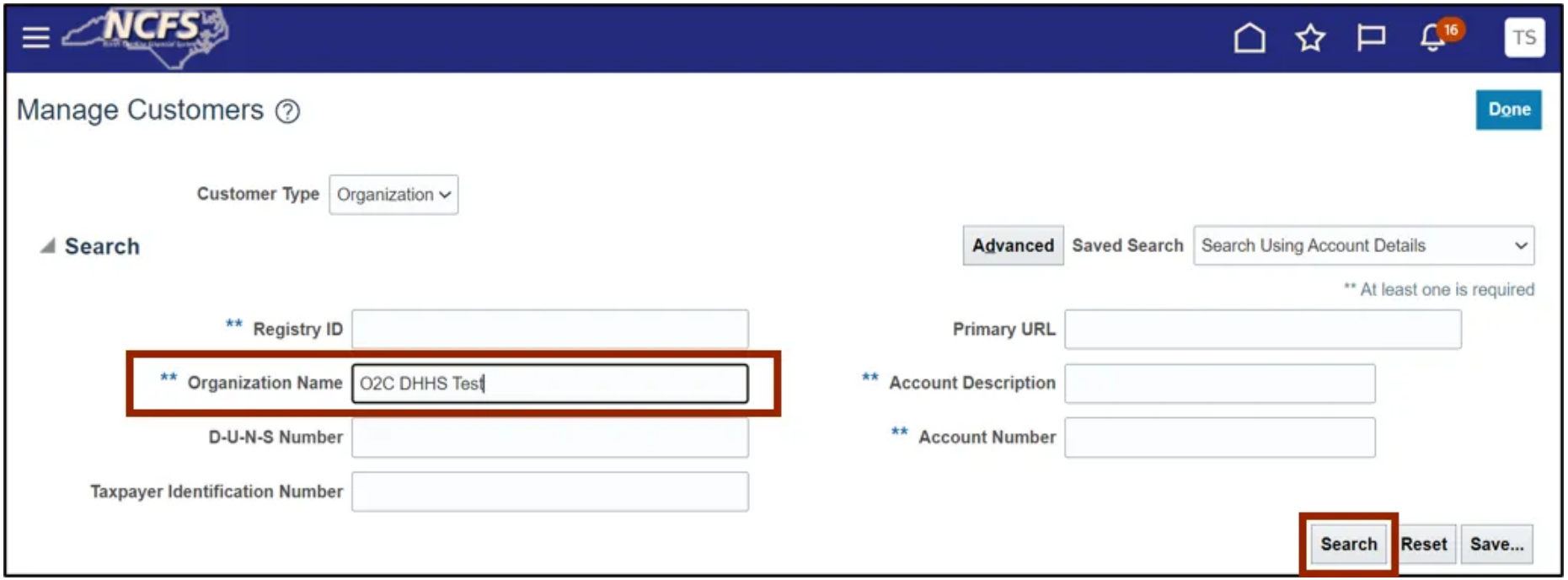


Step 4. The **Manage Customers** page opens. On the ***Search*** section, enter the name of the organization in the ***Organization Name*** field and click the **Search** button.

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

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

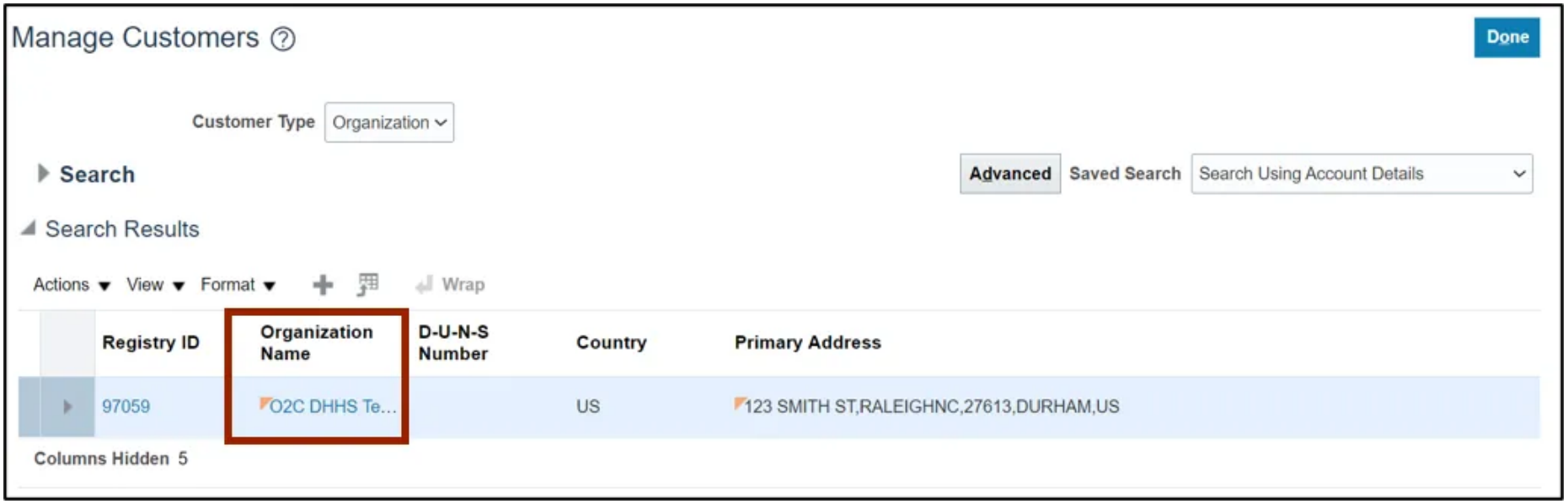
Image



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

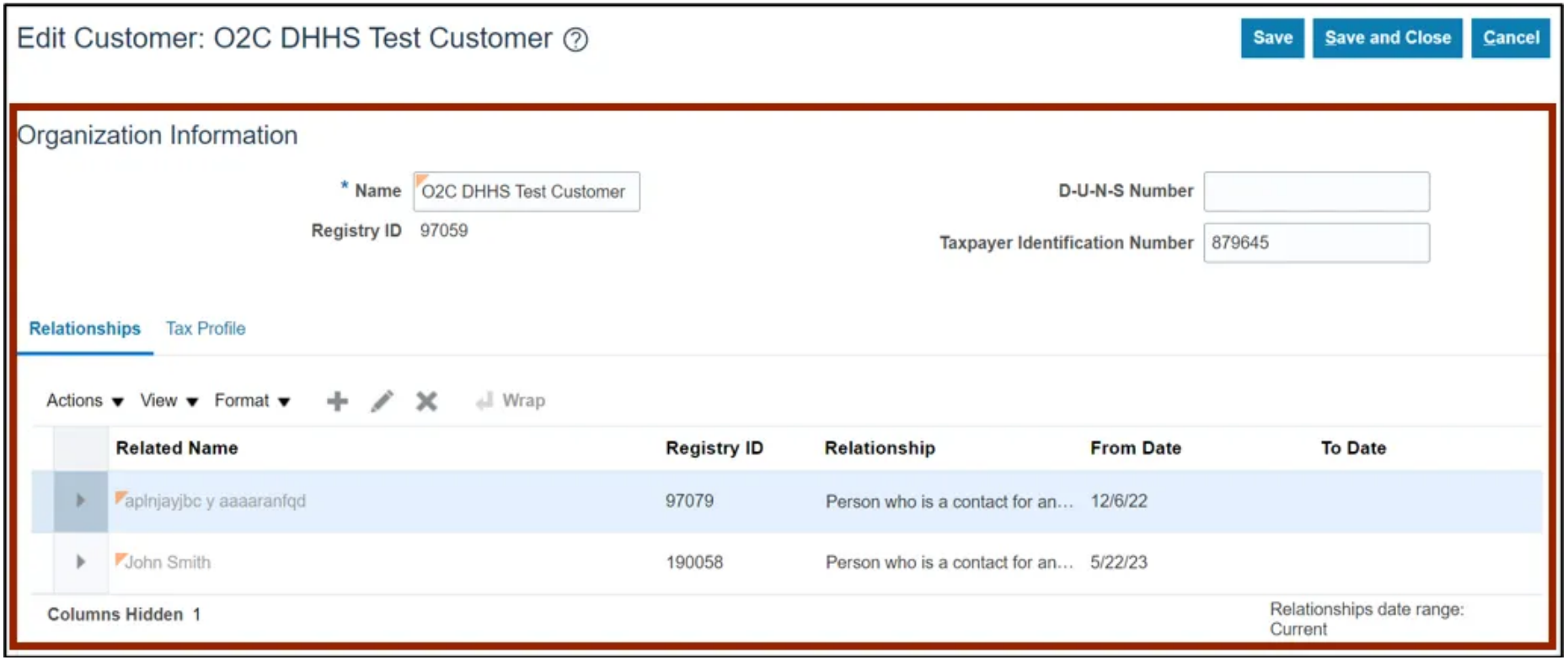
In this example, we choose **O2C DHHS Test**.

Image



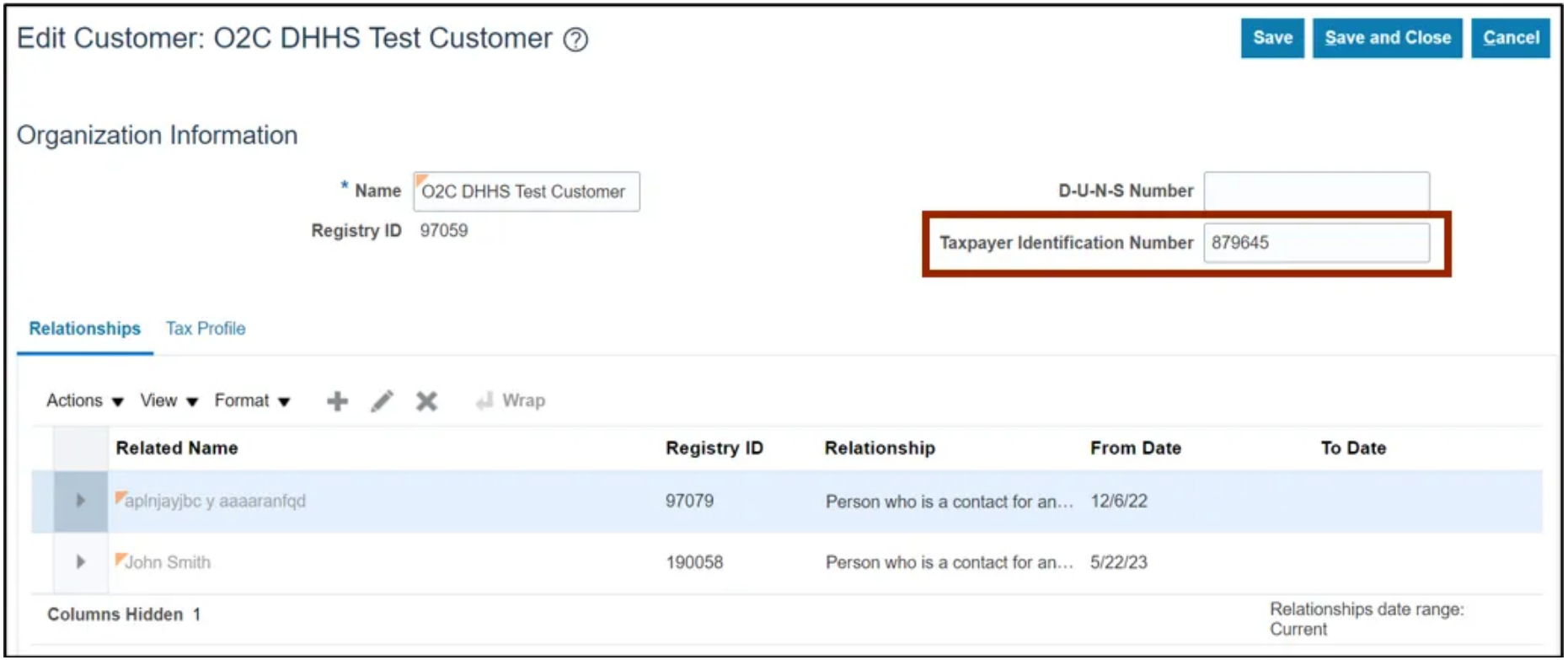
Step 6. The **Edit Customer** page opens. On the **Edit Customer** page, review the Customer Party information.

Image



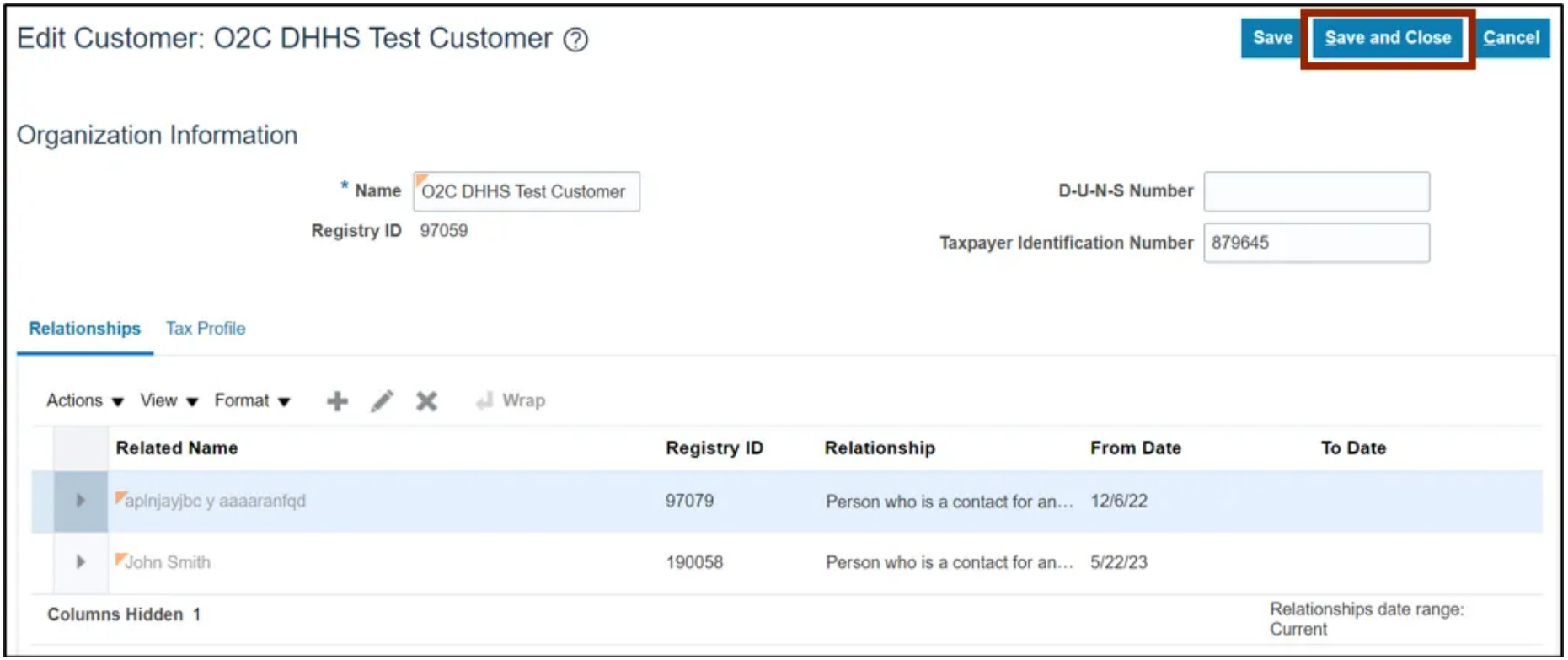
Step 7. View the Customer TIN on the ***Taxpayer Identification Number*** field.

Image



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

Image



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

Image



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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