

AR-19 DPI - Creating a Customer

Purpose

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

Introduction and Overview

This QRG covers the steps to create a customer in NCFS. This process also allows you to create the customer billing information.

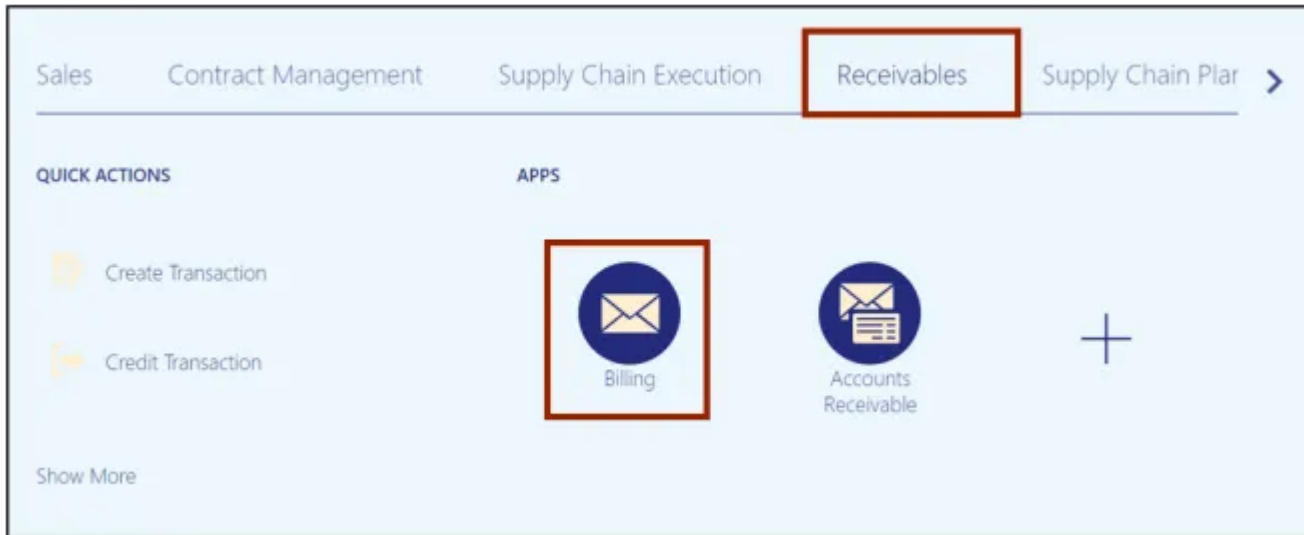
Steps to Create A Customer in NCFS

To create customer in NCFS, please follow the steps below. There are 11 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 **Create Customers** link in the left pane.

Image





DP

Billing  All business units 

Incomplete

0

0-10 Days

23

10+ Days

Approval

0

Research

0

View 

Complete

Delete

Transaction Number	Source	Class	Customer
169134	Manual	Debit Memo	NOT SP
166135	Manual	Credit Memo	
39002	Manual	Invoice	
91073	Manual	Invoice	
15008	Manual	Invoice	
15006	Manual	Invoice	Kingdom
15004	Manual	Invoice	HOME H
131185	Manual	Credit Memo	AMARDE
136227	Manual	Invoice	aicorsbc
15007	Manual	Invoice	SUNSHI
15005	Manual	Invoice	Touchpoi
15001	Manual	Invoice	Ahmadi &
15002	Manual	Invoice	PREMIE
12001	Manual	Credit Memo	James W



Transactions

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

Customers

- Create Customer
- Manage Customers
- Upload Customers from Spreadsheet
- Manage Customer Support

Customer Account Balances

- Review Customer Account Details

Accounting

- Create Accounting
- Create Adjustment Journal
- Review Journal Entries

Step 4. The Create Customers page opens.

Image

Create Organization Customer ?

Customer Type Organization ▼

Organization Information

* Name

Registry ID 368439

Enter
Party Details

Account Information

Account Number 59720

Account Description

Account Type ▼

Customer Class ▼

Enter
Account Details

Account Address

* Account Address Set ▼

* From Date 9/9/24 📅

To Date 📅

Enter Customer Account Site
Information ▼

Enter
Site Details

▶ Address

▶ Account Address Details

▴ Address Purposes

Actions ▼ View ▼ Format ▼ + × ☑ ⏴ Wrap

Step 5. **Enter Party Details:** In the **Organization Information** section, enter the correct **Name**.

Step 6. **Enter Account Details:**

- **Account Information:** Enter the data into the following fields: **Account Description Account Type, Customer Class, Customer Account Information**.
- **Account Address:** In the Account Address section, select the **Account Address Set** and **Enter Customer Account Site Information**.

Step 7. **Enter Site Details:** In the **Address** section of the page, enter the correct data into the following fields: **Address Line 1, City, State, Postal Code, County**.

Step 8. No information is needed in the **Account Address Details** section.

Step 9. In the **Address Purposes** section of the page, click the **Add** icon to add address purpose(s).

Step 10. Select the drop-down box in the **Purpose** column and Select: **Bill-to, Ship-to, Dunning**, and **Statements**.

Image

* State ▼

* Zip Code ▼

Zip Code Extension

* County ▼

Sales Tax Geocode

☒ Sales Tax Inside City Limits

Account Address Details

Customer Category Code ▼

Site Language ▼

Translated Customer Name

Address Purposes

Actions ▼ View ▼ Format ▼ + × ✓ ↶ Wrap

	Primary	Site	From Date	To Date	
		89616	9/10/24		▼

Bill-to Site

Acknowledgments

Bill to

Bills of lading

Correspondence

Credit contact

Credit memos

Deliver to

Drawee

Dunning

Installed at

Invoices

Late charges

Legal

Self service user

Ship to

Sold to

Statements

Subscription Location

Step 11. Select **Save and Close** in the upper right-hand corner of the page.

Image



NCFS

Create Organization Customer ?

Customer Type Organization ▼

Organization Information

* Name

D-U-N-S Number

Save and Close Cancel

Wrap Up

This QRG covers the steps to create a customer in NCFS. This process also allows you to create the customer billing information.

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