



SUPPLIER REGISTRATION

AP

QUICK REFERENCE GUIDE AP-17

Purpose

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

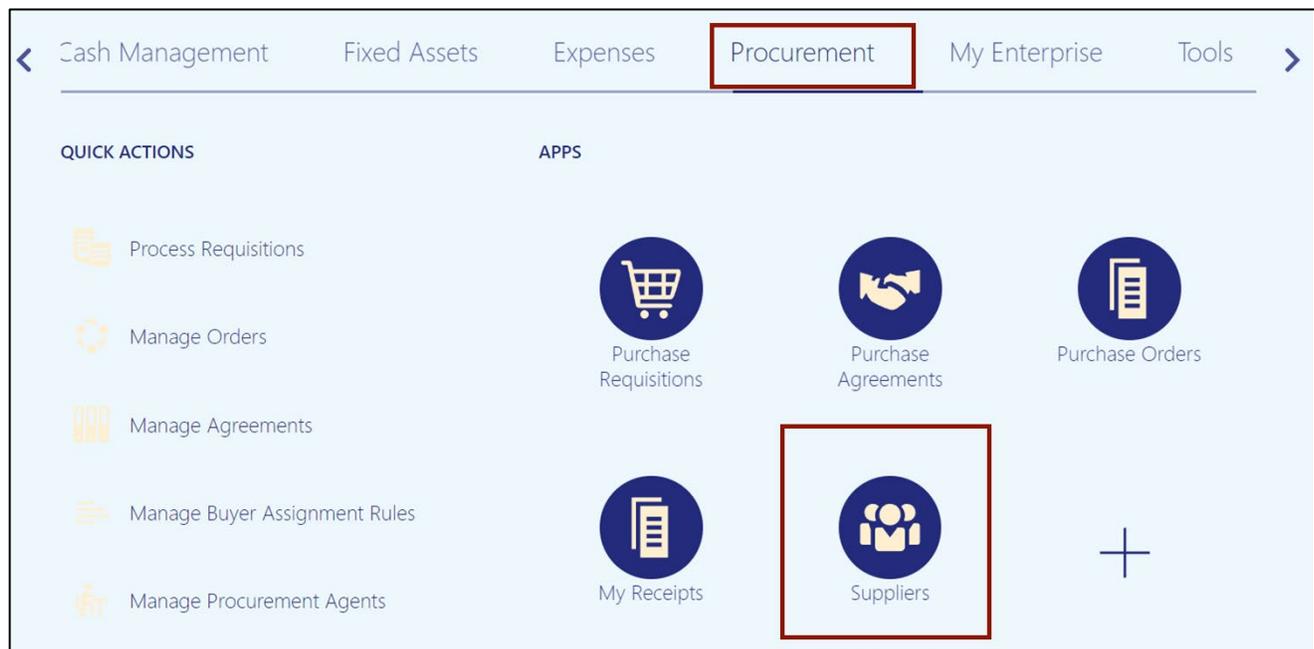
Introduction and Overview

This QRG covers the procedure of registration of suppliers in NCFS which will enable you to Register Supplier.

Create Supplier Profile Manually

To create a supplier profile manually 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 **Procurement** tab, and then click the **Supplier** app.



3. On the **Overview** page, click the **Tasks** [☰] icon and then click **Register Supplier**.

The screenshot shows the 'Overview' page with a 'Supplier Spend Authorization Requests' section. A 'Tasks' icon (☰) is highlighted with a red box. A sidebar menu on the right lists several options, with 'Register Supplier' also highlighted with a red box. Below the tasks menu is a table with columns: Request, Source, Supplier, Supplier Number, Business Relationship, and Requested By. The table is currently empty, and a 'Columns Hidden 11' message is visible below it.

4. The **Supplier Register** page opens in a new internet browser tab.

The screenshot shows the 'Supplier Registration' page with a 'Company Details' form. The form contains several fields: Business Relationship (Spend Authorized), Procurement BU (Required), Request Reason (Required), Company (Required), Website, Country (Required), Taxpayer ID, Tax Registration Number, D-U-N-S Number, Organization Type (Required), Supplier Type, and Justification. At the bottom of the form are 'Cancel', 'Save', and 'Continue' buttons. A sidebar on the right shows a navigation menu with '1 | 2' at the top and 'Company Details' and 'Contacts' as options.

5. In the **Company Details** section, enter the required information.
 - a. Business Relationship: Select the Business Relationship
 - i. Example: Spend Authorized
 - b. Procurement BU: Select the Procurement BU
 - i. Example: 0800 Department of Public Instruction
 - c. Request Reason: Select the Request Reason
 - i. Example: New Supply Source
 - d. Company Name: Enter the **Company** name.
 - i. Example: **Test ABC**.
 - e. Country: Select the country.
 - i. Example: United States
 - f. Organization Type: Select the organization type from the drop-down list.
 - i. Example: Corporation
 - g. Supplier Type: Select the supplier type from the drop-down list.

Supplier Registration

Company Details

1 | 2

Business Relationship: Spend Authorized

Procurement BU: 0800 DEPARTMENT OF PUBLIC INSTRUC

Request Reason: New Supply Source

Company: TEST ABC

Website:

Country: United States

Taxpayer ID:

Tax Registration Number:

D-U-N-S Number:

Organization Type: Corporation

Supplier Type: Supplier

Justification:

Cancel Save Continue

Company Details

Contacts

- In the **Company Details** section, you must enter one of the following: **Taxpayer ID**, **Tax Registration Number**, or **D-U-N-S Number**.

Company Details

1 | 2

Some issues need your attention X

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

Business Relationship: Spend Authorized | Procurement BU: 0800 DEPARTMENT OF PUBLIC INSTRUC

Request Reason: New Supply Source | Company: TEST ABC

Website: | Country: United States

Taxpayer ID ← | Tax Registration Number ←

D-U-N-S Number ← | Organization Type: Corporation

Supplier Type: | Justification:

Attach tax, insurance, and other relevant documents

Cancel Save Continue

Company Details

Contacts

- In the **Justification** field, enter the justification for the new supplier registration.

Request Reason: New Supply Source | Company: TEST ABC

Website: | Country: United States

Taxpayer ID | Tax Registration Number

D-U-N-S Number | Organization Type: Corporation

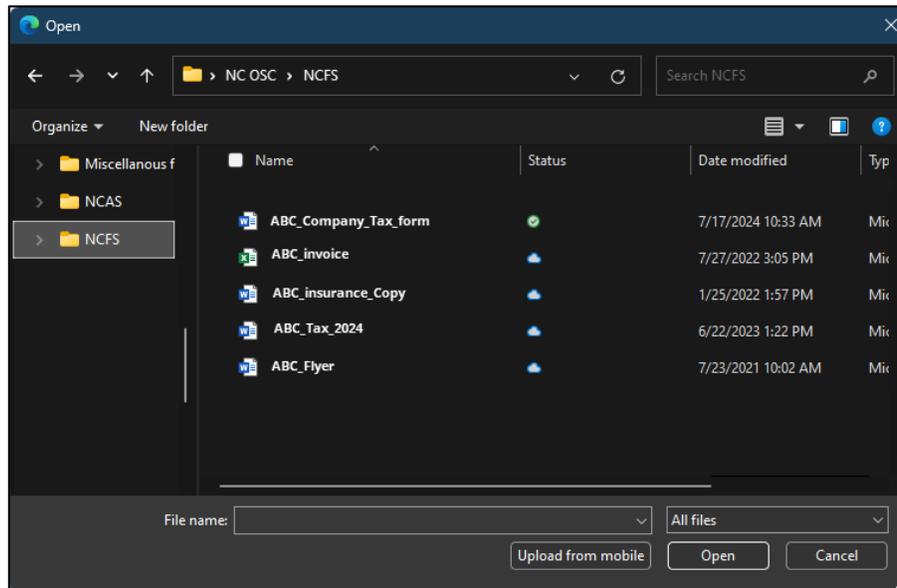
Supplier Type: | Justification: test user

Attach tax, insurance, and other relevant documents

1 | 2

- Click the **Drag and Drop** field to select files to attach with the new supplier registration. Examples of documents that may be attached are Tax, Insurance, and other relevant documentation.

- In the file explorer navigate to the correct file location and select the files needed to upload into the Supplier Registration.



10. Once the Company Details have been entered. Click **Save**.

Attach tax, insurance, and other relevant documents

Category
From Supplier

Drag and Drop
Select or drop files here.

URL

From Supplier
test.docx
14.32 KB

Updated just now

Company Details

Contacts

Detailed description: This screenshot shows a web form for uploading documents. At the top, there is a dropdown menu for 'Category' set to 'From Supplier'. Below it is a dashed box labeled 'Drag and Drop' with the instruction 'Select or drop files here.'. Underneath are two input fields: 'URL' and 'Add URL'. A file named 'test.docx' (14.32 KB) is shown as having been uploaded from a supplier. At the bottom left, it says 'Updated just now'. At the bottom right, there are three buttons: 'Cancel', 'Save', and 'Continue'. The 'Save' button is highlighted with a yellow box and a mouse cursor is pointing at it. On the right side of the form, there is a dark sidebar with 'Company Details' and 'Contacts' options.

11. Click **Continue**.

Attach tax, insurance, and other relevant documents

Category
From Supplier

Drag and Drop
Select or drop files here.

URL

From Supplier
test.docx
14.32 KB

Last updated 3 minutes ago

Company Details

Contacts

Detailed description: This screenshot is identical to the previous one, showing the same document upload form. However, the 'Continue' button at the bottom right is now highlighted with a yellow box and a mouse cursor is pointing at it. The 'Save' button is no longer highlighted. The status at the bottom left has changed to 'Last updated 3 minutes ago'. The sidebar on the right remains the same.

12. Enter the required information into the Contacts page. The registration communications will be sent to the individual entered in the Contacts details page.
 - a. First Name: Enter the first name of the contact.
 - b. Last Name: Enter the last name of the contact.
 - c. Email: Enter the email address of the contact.
 - d. Contact number: Enter the mobile, phone, and/or fax number for the contact.

Place company name here

Supplier Registration

Contacts

Contact 1
Enter contact details. Registration communications will be sent to this contact.

First Name ← <small>Required</small>	Last Name ← <small>Required</small>
Email ← <small>Required</small>	Job Title
Country ▼ US	Mobile +1
Country ▼ US	Phone +1
Country ▼ US	Fax +1

Is this an administrative contact?
Administrative contact will receive general communications from us. Yes No

Does this contact need a user account?
User accounts will provide online access to supplier transactions and self-service tasks. Yes No

Last updated 4 minutes ago
Cancel Save **Submit**

2 | 2

Company Details

Contacts

13. Select the contact type. If the contact is an administrative contact, they will receive general communication information. Select **Yes** if they are an administrative contact select **No** if they are not.

The screenshot shows a web form with a sidebar on the right containing 'Company Details' and 'Contacts'. The main form area has two questions. The first question, 'Is this an administrative contact?', is highlighted with a yellow box and has a mouse cursor pointing to the 'Yes' radio button. Below it is the question 'Does this contact need a user account?' with 'Yes' also selected. At the bottom of the form are 'Cancel', 'Save', and 'Submit' buttons. A status message 'Last updated 4 minutes ago' is visible in the bottom left.

14. Select if the contact needs a user account. A user account provides access to supplier transactions and self-service tasks. Select **Yes** if the contact needs a user account, select **No** if the contact does not.

This screenshot is a close-up of the second question from the previous form: 'Does this contact need a user account?'. It is highlighted with a yellow box and has a mouse cursor pointing to the 'Yes' radio button. The sidebar on the right shows 'Contacts' selected. The 'Cancel', 'Save', and 'Submit' buttons are visible at the bottom, along with the 'Last updated 4 minutes ago' status message.

15. Click the **Save** button.

Supplier Registration
2 | 2

Contacts

Contact 1
Enter contact details. Registration communications will be sent to this contact.

<input type="text" value="First Name"/> John	<input type="text" value="Last Name"/> Doe
<input type="text" value="Email"/> JDoecorpco@newtestcorp.com	<input type="text" value="Job Title"/> CFO
<input type="text" value="Country"/> US	<input type="text" value="Mobile"/> +1 919 555 5555
<input type="text" value="Country"/> US	<input type="text" value="Phone"/> +1 <input type="text" value="Ext"/>
<input type="text" value="Country"/> US	<input type="text" value="Fax"/> +1

Is this an administrative contact?
Administrative contact will receive general communications from us. Yes No

Does this contact need a user account?
User accounts will provide online access to supplier transactions and self-service tasks. Yes No

[+ Add Another Contact](#)

Last updated 59 seconds ago

Company Details

Contacts

16. Click the **Submit** button.

Supplier Registration

Contacts

Contact 1
Enter contact details. Registration communications will be sent to this contact.

First Name John	Last Name Doe
Email JDoecorpcco@newtestcorp.com	Job Title CFO
Country US	Mobile +1 919 555 5555
Country US	Phone +1
Country US	Fax +1

Is this an administrative contact?
Administrative contact will receive general communications from us. Yes No

Does this contact need a user account?
User accounts will provide online access to supplier transactions and self-service tasks. Yes No

[+ Add Another Contact](#)

Last updated 59 seconds ago

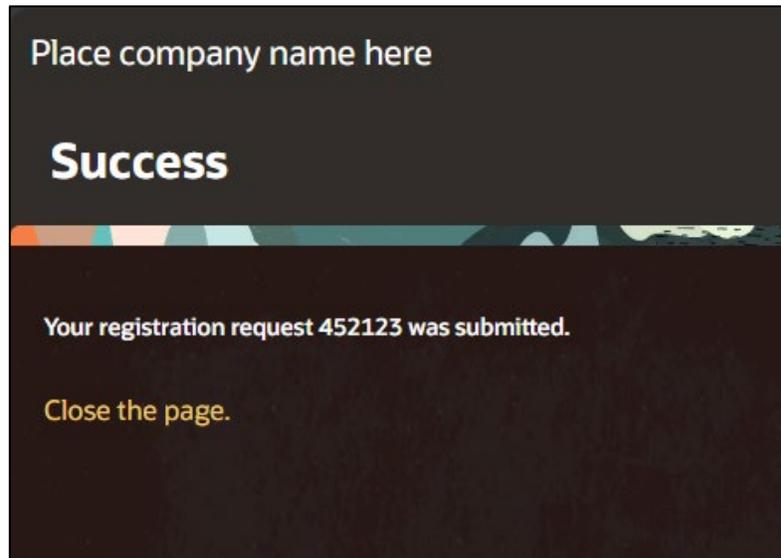
Cancel Save Submit

2 | 2

Company Details

Contacts

17. The Success Confirmation page will appear after a successful registration request providing a registration request number. Click **Close the page**, to return to the Supplier Dashboard.



Wrap-Up

Register Suppliers using the steps above to register the supplier registration request and update the supplier data elements.

Additional Resources

Virtual Instructor-Led Training (vILT)

- PO105: Supplier Management
- PO104: Supplier Registration