

# **VIEW SUPPLIERS**

# **QUICK REFERENCE GUIDE AP-06**

## Purpose

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

## Introduction and Overview

This QRG covers the process of searching Supplier records and validating Supplier information in the NCFS.

**Inquire Supplier Records** 

To query Supplier Records, 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 **Suppliers** app.





3. On the **Overview** page, Click the **Tasks** [ ] icon and select **Manage Suppliers** in the resulting pop-up.

lverview	Manage Suppliers
Overview (?)	Register Supplier     Create Supplier     Manage Supplier Registration Requests
Supplier Spend Authorization Requests	Import Suppliers     Merge Suppliers
Pending Approval Rejected	
Actions 🗸 View 🖌 Format 🖌 🥒 🖽 Freeze 📓 Detach 🚽 Wrap Pending Past 30 days 🗸	
Request Source Supplier Supplier Business Relationship Requested By	
4 Columne Hidden 11	

4. Enter the Supplier details in the *Keyword* section and click the **Search** button. In this example, we choose **KRONOS INC**. Under *Search Results* section, select **KRONOS INC**.

▲ Search			A <u>d</u> vanced	Manage Watchlist	Saved Search	All Suppliers V
						* Required
* Keywords	RONOS INC					
					Search	Reset Save
Search Results						
Actions 👻 View 👻 Format 👻 🕂	🖋 🎵 📴 🕅 Free	eze 📄 Detach 斗 Wrap	Register Supplier			
Supplier S	Alter Supplier Number Nam	Business Relationship Pare	ent Supplier Creati	on Date Inactive	Spe e Since Aut Rev	nd ( horization ( iew Status
KRONOS INC 1	100250 K	Spend Authorized	11/10/2	22		I
<						+

5. The **Supplier:** page opens. Click the **Profile** tab to view the details on the supplier profile. Begin the process of validation by reviewing the data on this page.

erview Manage Supplier	s × Supplier: KRONOS INC ×			
Supplier: KRON	OS INC ⑦ ★			Edit
Profile Addresses S	tes Contacts Qualifications			
General				
Suppl	ier KRONOS INC	Business Relationship	Spend Authorized	
Supplier Num	er 100250	Parent Supplier		
Alternate Na	ne KRONOS INC	Parent Supplier Number		
Tax Organization Ty	pe UNDESIGNATED	Creation Date	11/10/22	
Supplier Ty	pe Supplier	Creation Source	Import	
Inactive D	ite	Registration Request		
Stat	us Active	Attachments	None	

6. To validate the supplier's address, click the **Addresses** tab and the **Address link** to be reviewed.

In this example, we chose: GA.30374.02.

Edit Supplier: KR	ONOS INC 🕐 ★				Save Sub <u>m</u> it <u>C</u> ance
Profile Addresses Site	es Contacts Qualifications				Last Saved 6/20/23 6:50
Actions ▼ View ▼ For	mat 🔻 🕂 💉 🗙 Status Ac	tive 🗸 🔟 Freeze	<b>↓</b> Wrap		
Address Name	▲ ♥ Address	Phone	Address Purpose	Fax	Status
GA.30374.02	PO BOX 743208,TEST 1,T	EST 2,AT +1 (978) 2	44-6372 Remit to		Active
MA.01824.01	123 MAIN ST, RALEIGHNC	,27609,W	Ordering		Active

7. The **Address: GA.30374.02** page opens. Validate the Address data and Additional Information. After validating the information, click the **Done** button.

							1	r	
Address: GA.3037	'4.02 ⑦							l	D <u>o</u>
Address Name	GA.30374.02			Address Pu	rpose Orc	derina			
Country	United States			Address Fu	✓ Rer	mit to			
Address Line 1	PO BOX 743208				RF	Q or Bidding			
Address Line 2	Test 1					70 0440070			
Address Line 3	Test 2				Phone 1 9	78 2446372			
Address Line 4					Fax				
City	ATLANTA				Email				
State	GA			Inactiv	e Date				
Zip Code	30374				Status Active	Э			
Zip Code Extension	3208								
County	Fulton								
Language									
							4		
dditional Information									
ress Details									
s Transaction Tax Contacts	Payments								
ctions 🔻 View 👻 Format 👻	🕂 🥅 Freeze 📳	Detach 🚽 Wrap							
				* Site Purpose					
* Procurement BU	* Site	Sourcing Only	Purchasing	Procurement Card	Pay	Primary Pay	Attachments	Status	
3000 DHHS MENTAL HEALTH							None	Active	
							None	Active	
3700 DHHS BROUGHTON HOSE									

8. Click the Sites tab to validate this data. Click one the Pay Site that needs review.

In this example, we chose: R.30PT.01.

Profile	Addresses Site	<b>s</b> Contacts Qu	alifications					
Actic	ons <b>v</b> iew <b>v</b> For	mat 🔻 🕂 🌶	🕅 🕅 Freeze	📄 Detach 🚽 Wrap Status	Active ~			
	Procurement BU	Site	Alternate Site Name	Address	Site Purpose Alternate Pay Site	Income tax reporting site	Attachments	SI
	3000 DHHS ME	O.30PT.01	KRONOS I	7123 MAIN ST,RALEIGHNC,27609	Purchasing;	_	None	A
	3000 DHHS ME	R.30PT.01	KRONOS I	PO BOX 743208,TEST 1,TEST 2,	Pay	~	None	A
	3700 DHHS BR	O.37PT.01	KRONOS I	7123 MAIN ST,RALEIGHNC,27609	Purchasing	_	None	A
	3700 DHHS BR	R.37PT.01	KRONOS I	PO BOX 743208,TEST 1,TEST 2,	Pay	~	None	A

9. The **Site: R.30PT.01** page opens. Under the **General** tab, validate the information.

Overview Manage Suppliers ×	Supplier: KRONOS INC ×			
Site: R.30PT.01 ⑦				D <u>o</u> ne
Procurement BU	3000 DHHS MENTAL HEALTH	Site Purpose	Sourcing only	
Address Hanne	PO BOX 743208,TEST 1,TEST 2,ATLANTAGA,303743208,FULTON,US		<ul> <li>Procurement card</li> <li>Pay</li> </ul>	
Site Inactive Date Status	R.30PT.01 Active	Attachments	Primary pay	
Additional Information Attribute Value EVP Group Number	ADDITIONAL INFO	NCAS Group Num	ber 01	
General Purchasing Receiv	ving Invoicing Payments Site Assignments Qualifications			
Identification Alternate Site Name	<ul> <li>Income tax reporting site</li> <li>KRONOS INC</li> </ul>	Customer Number		

# 10. Within the **Edit** Site page, validate the information on **Invoicing** tab.

General Purchasing Recei	ving Invoicing Payments	Site Assignments	Qualifications		
Controls					
Invoice Currency		•	Payment Currency		•
Invoice Amount Limit			Payment Priority		
Invoice Match Option	~		Pay Group	Standard	•
Match Approval Level	~				
Quantity Tolerances		•			
Amount Tolerances		•			
Payment Hold Controls	5				
Hold All Invoices	~		Payment Hold Reason		
Hold Unmatched Invoices	Default from Payables Options	~			10
Hold Unvalidated Invoices	~				

11. Within the **Edit** Site page. validate the information on the **Payments** tab and **Payment Methods** sub-tab.

neral Purchasi	ing Receiving Invoicing Payments Site Assignments Qualifications		
ayment Method	Is Bank Accounts Payment Attributes		
View 👻 🕂	× O F		
Default	* Payment Method	* From Date	To Date
	Check - Employee	1/1/20	m/d/yy l
	Check - One Time Payment	1/1/20	m/d/yy
	Check - Supplier	1/1/20	m/d/yy
	Electronic - Employee	1/1/20	m/d/yy
	Electronic - IGO	1/1/20	m/d/yy
	Electronic - One Time Payment	1/1/20	m/d/yy
	Electronic - Supplier	1/1/20	m/d/yy

#### 12. Once validated, click the **Done** button.

<u>Overview</u>	Manage Suppliers ×	Supplier: KRONOS INC ×		
Site:	R.30PT.01 ⑦		Done	
	Procurement BU	3000 DHHS MENTAL HEALTH	Site Purpose Sourcing only	
	Address Name	GA.30374.02	Purchasing	
	Address	PO BOX 743208, TEST 1, TEST 2, ATLANTAGA, 303743208, FULTON, US	Procurement card	
	Site	R.30PT.01	✓ Pay Primary pay	
	Inactive Date Status	Active	Attachments None	
⊿ Ad	ditional Information			
	Attribute Value EVP Group Number	ADDITIONAL INFO	NCAS Group Number 01	

13. To validate the supplier's Contacts, click the **Contacts** tab and select the Name needing review.

In this example, we chose: **awrwpacevd**, **ajpciazkgc**.

Overview Manage Suppliers x	Supplier: KRONOS INC ×					
Supplier: KRONOS	INC ② ★					Edit Done
Profile Addresses Sites	Contacts Qualifications					
View  View	Freeze 📄 Detach	Wrap Status Active ~	]			
Name	Job Title	Email	Administrative Contact	User Account	Status	
Zaaaqnaxetd, aaaagalhrd			_	_	Active	

14. The **Contact:** page opens. Validate the Contact Details. Once validated, click the **Done** button.

ddrees Nome	Address		Phone	Status	Address
/iew 🔻 Format	🔻 🏢 Freeze 📓 Detach 斗 Wrap				
Contact Add	dresses				
	Administrative Contact	Status	Active		
Job Title	Business Analyst	Email	sendmail-test-discard+300000097233228@oracle.com		
Last Name	awrwpacevd	Fax			
Middle Name	-jp	Mobile			
Salutation First Name	aipciazkoc	Phone	9195551234		
ontact: ajp	ciazkgc y awrwpacevd ⊘				

15. On **Supplier:** page, click the **Done** button.

Overview Manage Suppliers ×	Supplier: KRONOS INC ×					
Supplier: KRONOS	INC ② ★					Edit Done
Profile Addresses Sites	Contacts Qualifications					
View 🔻 Format 👻 🕎	Freeze Detach	Wrap Status Active ~	]			
Name	Job Title	Email	Administrative Contact	User Account	Status	
Faaaqnaxetd, aaaagalhrd			—	—	Active	
Fawrwpacevd, ajpciazkgc	Busines	sendmail-test-discard+30	_		Active	

Note: After Done, you will be redirected to the **Manage Suppliers** page.

### Wrap-Up

Users can search supplier records and validate the supplier information in NCFS, by using the steps explained above.

#### Additional Resources

#### Web Based Training (WBT)

• PO002 - Supplier Inquiry

#### Instructor Led-Training (vILT)

- PO104 Supplier Registration
- PO105 Supplier Management