AR-28 View Dunning History

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide on how to view dunning history in the North Carolina Financial System (**NCFS**).

Introduction and Overview

This QRG covers the process for viewing dunning history in NCFS by navigating to the History tab on the Customer page within the Collections Manager.

Create Customer Records

To view dunning history in NCFS, please follow the steps below. There are 17 steps to complete this process.

Step 1. Click the **Company Single Sign-On (SSO)** button.

Step 2. Enter your **@dac.nc.gov** email address.

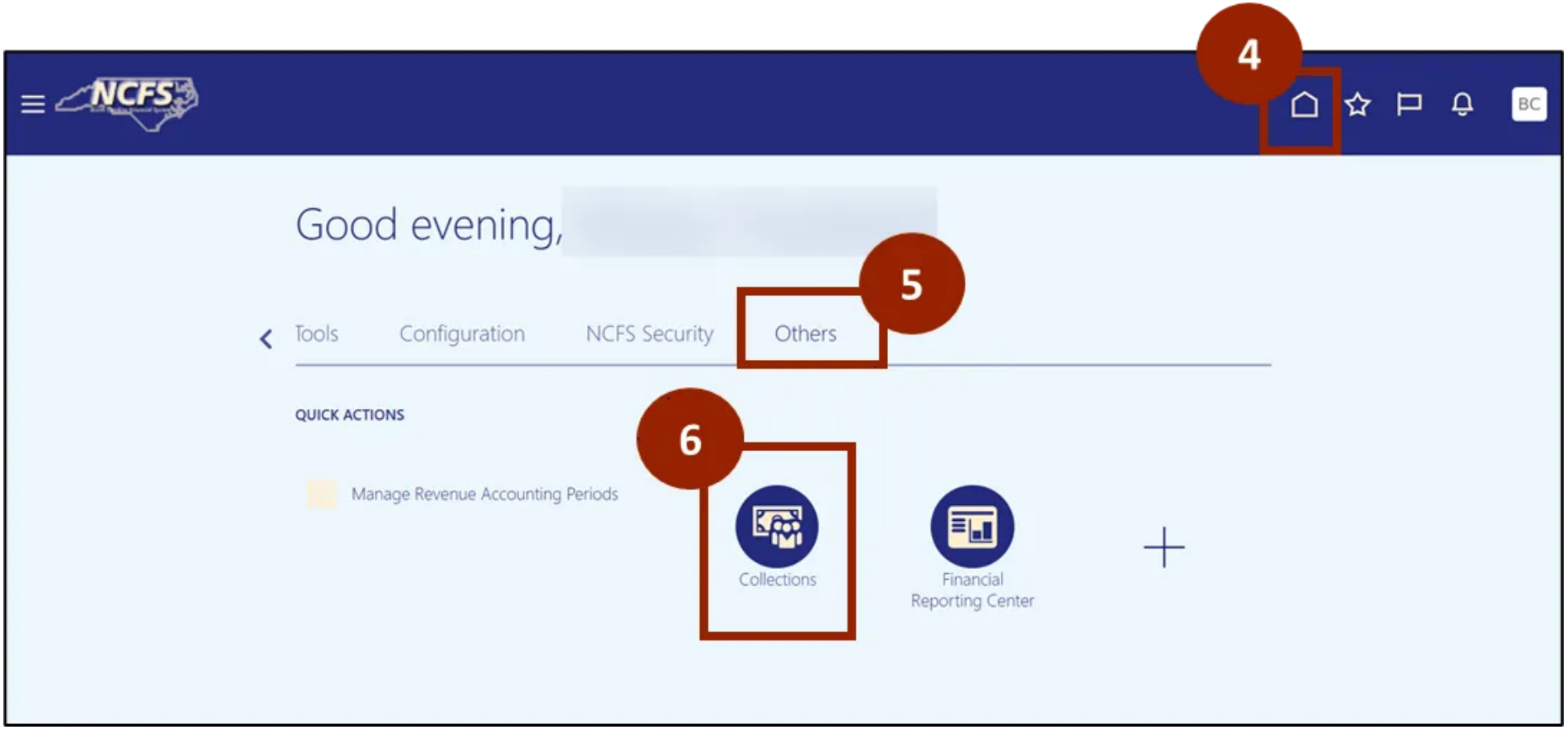
Step 3. Click **Next**, then enter **password**.

Step 4. Navigate to the **Home** page.

Step 5. While on the **Home** Screen, navigate to the **Others** tab.

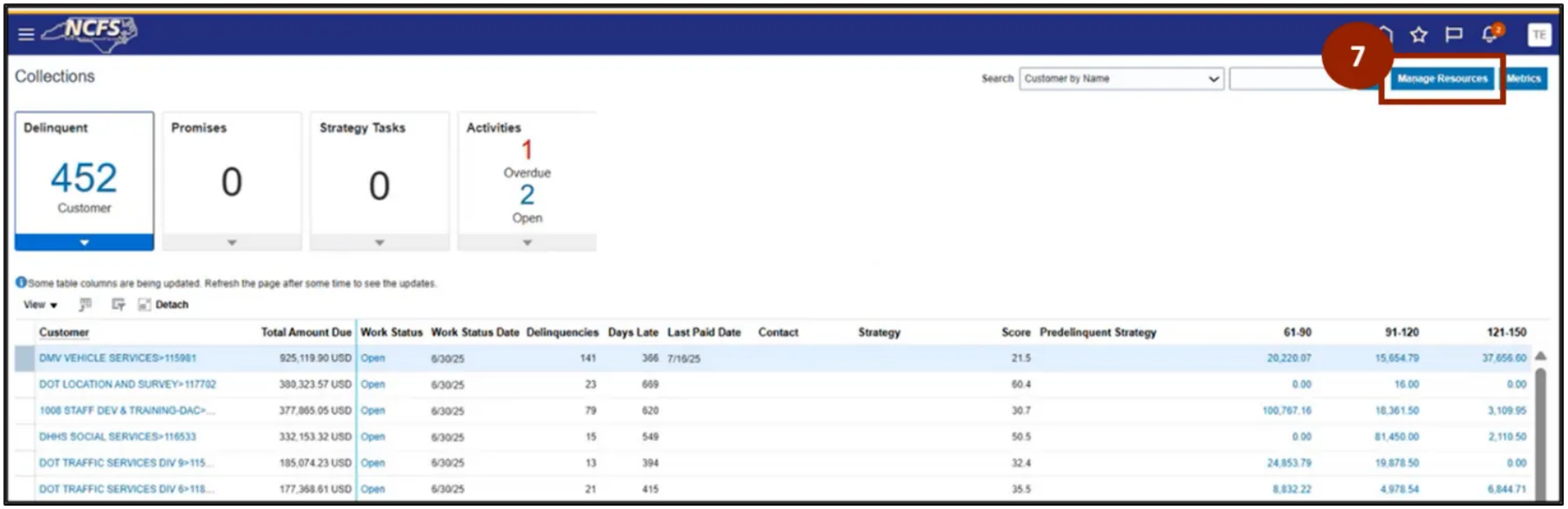
Step 6. In the **Others** tab, click on **Collections**.

Image



Step 7. Click on the **Manage Resources**.

Image

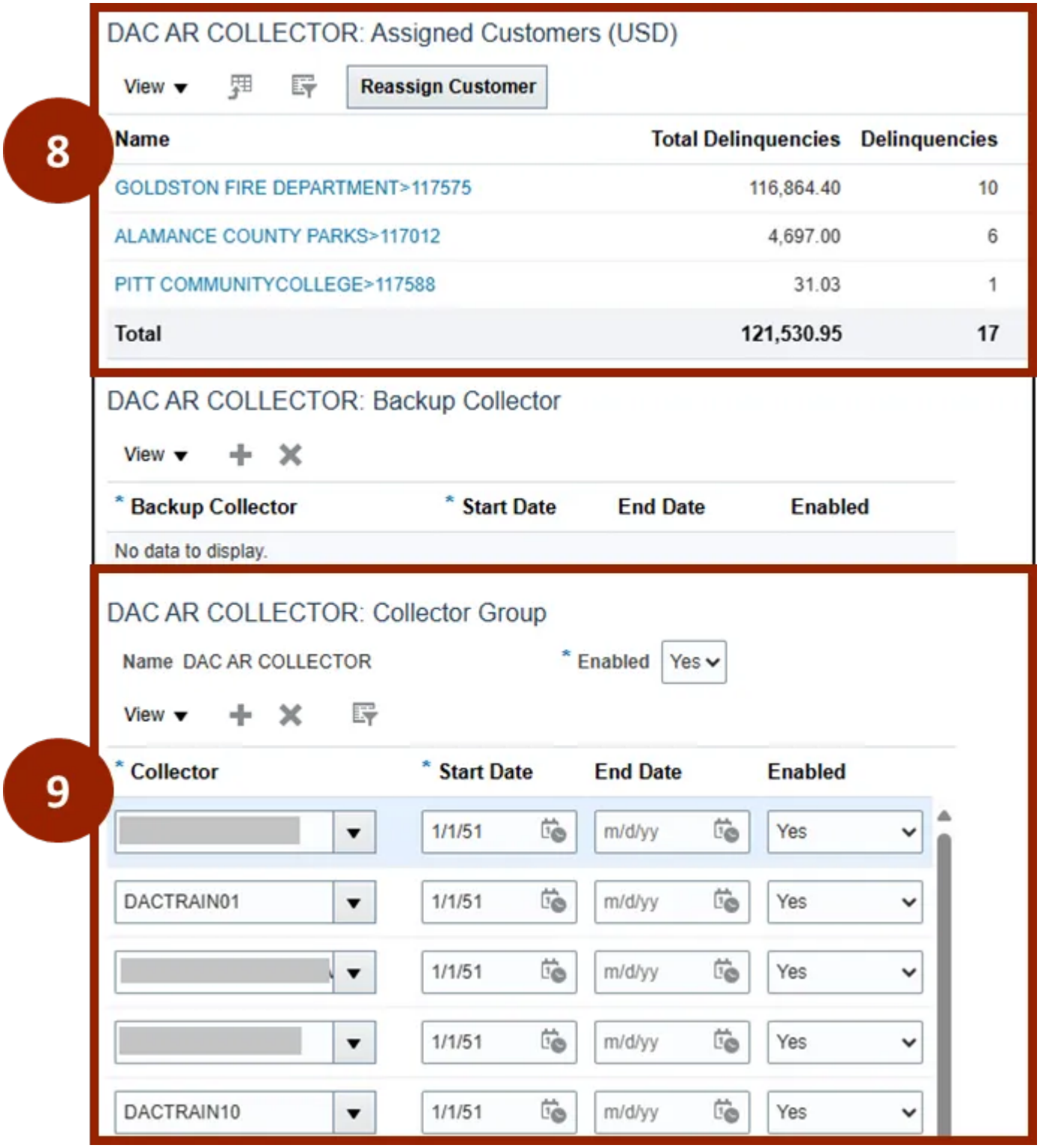


Step 8. Customers can be found in the **Assigned Customers** section.

Step 9. The **DAC AR Collector** section displays all collectors assigned to the group.

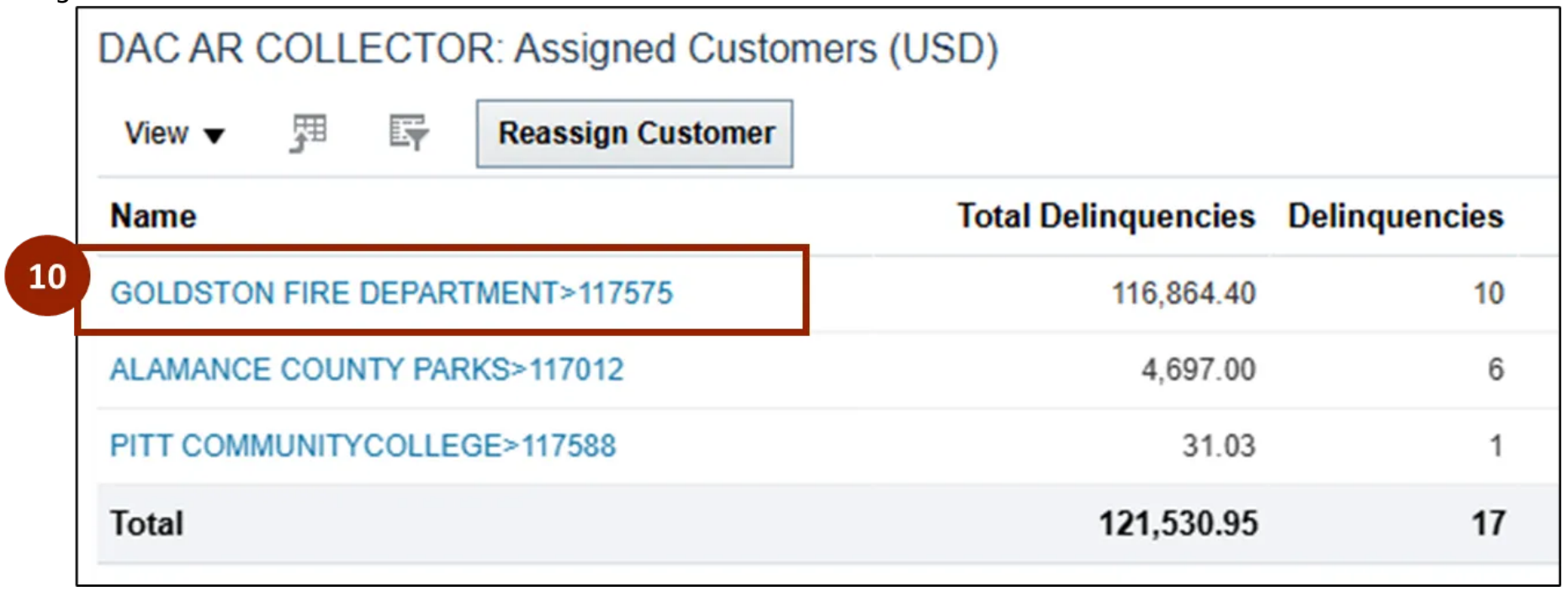
NOTE: Once added to the collector group, the Collector has visibility for all customers.

Image


DAC AR COLLECTOR: Assigned Customers (USD)
View
Reassign Customer
8
Name
Total Delinquencies
Delinquencies
GOLDSTON FIRE DEPARTMENT>117575
116,864.40
10
ALAMANCE COUNTY PARKS>117012
4,697.00
6
PITT COMMUNITYCOLLEGE>117588
31.03
1
Total
121,530.95
17
DAC AR COLLECTOR: Backup Collector
View
* Backup Collector
* Start Date
End Date
Enabled
No data to display.
DAC AR COLLECTOR: Collector Group
Name DAC AR COLLECTOR
* Enabled
Yes
View
9
* Collector
* Start Date
End Date
Enabled
1/1/51
m/d/yy
Yes
DACTRAIN01
1/1/51
m/d/yy
Yes
1/1/51
m/d/yy
Yes
1/1/51
m/d/yy
Yes
DACTRAIN10
1/1/51
m/d/yy
Yes

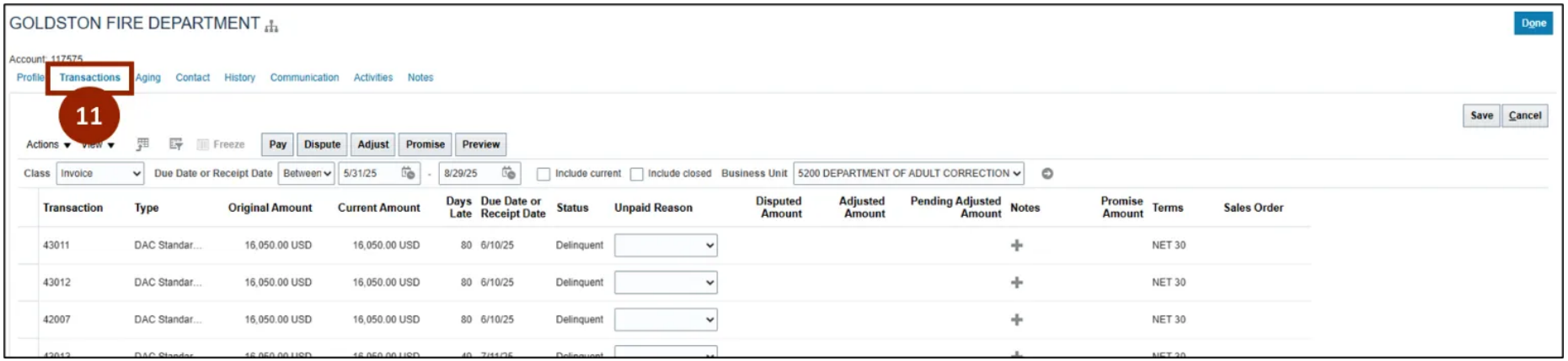
Step 10. To navigate to the **Customer** page within the **Collections Manager**, click on the **Customer Name**.

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Step 11. The **Customer** page will automatically open on the **Transactions** tab.

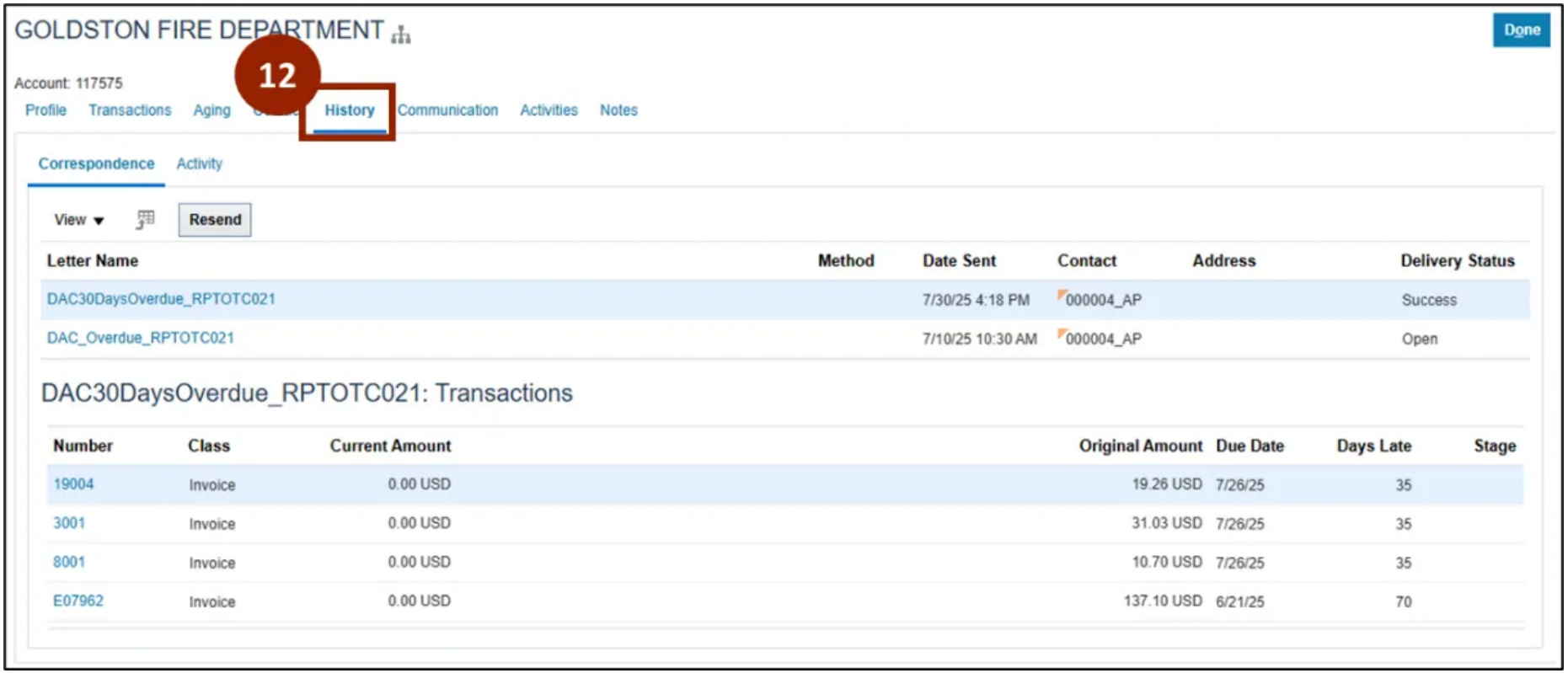
Image



Step 12. From the **Customer** page, select the **History** tab.

NOTE: Within the **History** tab of the **Customer** page, Collectors can see a chronological record of all significant interactions, activities, and changes related to the customer’s account.

Image



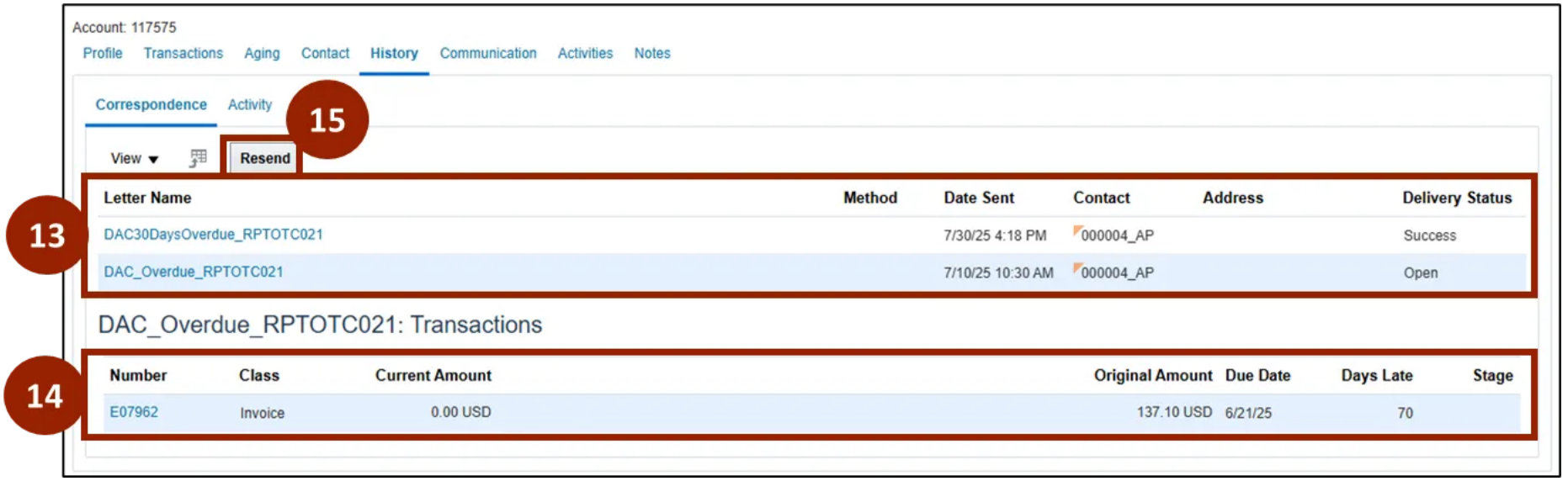
NOTE: When accessing the **History** tab of the **Customer** page, the **Correspondence** tab is displayed by default.

Step 13. On the **Correspondence** tab view all Dunning Letters sent, including **Letter Name, Date Sent, Contact,** and **Delivery Status**.

Step 14. Select the **Letter Name** to see the **Transactions** included in that specific dunning letter.

Step 15. Select **Resend** to send the dunning letter again.

Image



Step 16. On the **Activity** tab, view a full transaction history for the customer, including all receipts and adjustments created.

Step 17. To see more than the last 30 days of transactions, adjust the date range and select the **gray arrow** to update the table.

Wrap-Up

NCFS users can view dunning history in the Collections Manager by accessing the History tab on the Customer page. This allows users to quickly review account correspondence and activity for effective collections management.

Additional Resources

- Instructor Led Training (ILT)
  - AR109: Manage Collections (Coming Soon)

First Published

Mon, 11/17/2025

Last Updated

Mon, 11/17/2025

Printable PDF