

AR-02 Manage Communications with Customers

Purpose

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

Introduction and Overview

This QRG covers the steps to manage customer communication through Phone or E-mail in NCFS. This process will help in maintaining up-to-date and accurate customer details and provide detailed customer information.

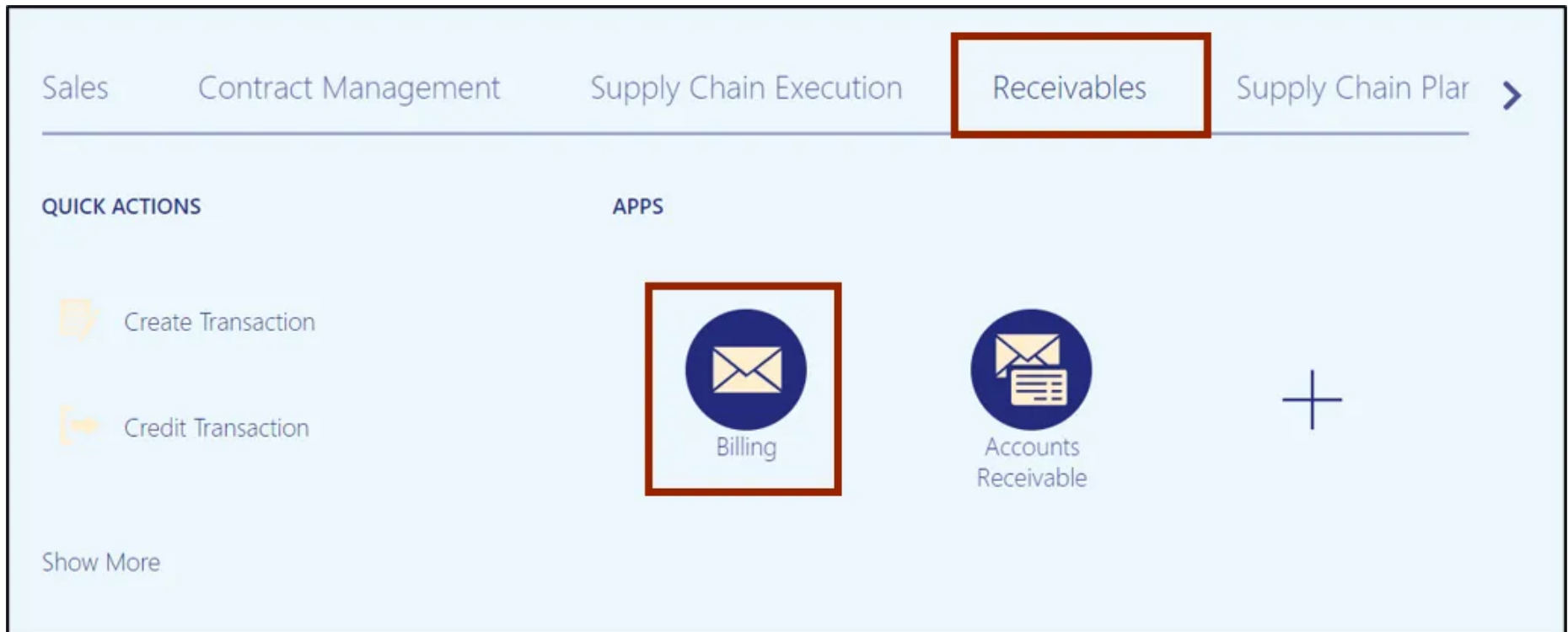
Manage Communications with Customers

To manage communications with customers 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. On the **Billing** page, click the **Tasks** icon and click **Manage Customers**.

Image

Billing ? All business units ▼

Incomplete

0
0-10 Days

3
10+ Days

Approval

View ▼ [Grid Icon] [List Icon] [Complete] [Delete]

Transaction Number	Source	Class	Customer
21001	Manual	Invoice	UNC CHAPEL ...
24001	Manual	Invoice	UNC ROCKIN...
28001	Manual	Invoice	UNC ROCKIN...

Transactions

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

Customers

- Create Customer
- Manage Customers**
- Upload Customers from Spreadsheet
- Manage Data Import

Customer Account Balances

- Review Customer Account Details

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

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

Image

NCFS 16 TS

Manage Customers ? Done

Customer Type Organization

Search Advanced Saved Search Search Using Account Details

**** Registry ID**

**** Organization Name**

D-U-N-S Number

Taxpayer Identification Number

Primary URL

**** Account Description**

**** Account Number**

Search Reset Save...

** At least one is required

Step 5. Scroll down to the **Accounts** section. Click the **Account Number** to open an account.

In this example, we choose **19002**.

Image

O2C DHHS Test Customer: Accounts

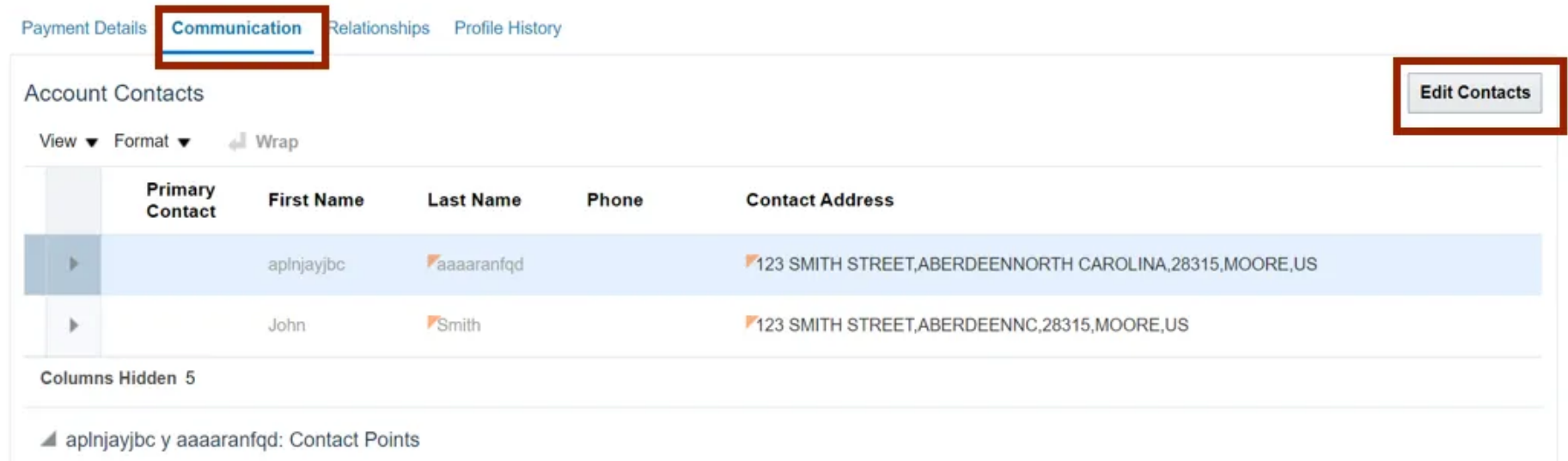
View Format + Wrap

Account Number	Account Description	Customer Class	Account Type
19002	O2C DHHS Test Account Description	Cost Settlement (B1)	External

Columns Hidden 70

Step 6. The **Edit Account** page opens. Click the **Communication** tab and click the **Edit Contacts** button.

Image



Step 7. The **Edit Contacts** page opens. On the **Contact Points** section, click the **Plus** icon to create a contact point.

Image

Contact Points

Actions

View

Format

+

X

Wrap

Type

All Contact Points

Primary

Primary by Purpose

Type

Purpose

Value

Contact Preferences

Role

No data to display.

Columns Hidden 3

Date Range: Current

Responsibilities

Contact Name

John Smith

Prefix

First Name

John

Last Name

Smith

Middle Name

Step 8. The **Create Contact Point** pop-up appears. Select the **Contact Point Type** from the drop-down choice list and enter **Email address** and **From Date**. Click the **OK** button.

In this example, choose **E-mail for Contact Point Type**, john@xyzmail.com for **Email address** and **5/22/23** for **From Date**.

Image

▲ Contact Points

Actions ▼ View ▼ Format ▼ + ✎ ✕ ☑ ↶ ↷

	Primary	Primary by Purpose	Type
▶	✓		E-mail

Columns Hidden 3

▲ Responsibilities

Contact Name John Smith

Prefix ▼

First Name John

Last Name Smith

Create Contact Point

Contact Point Type E-mail ▼

Purpose Phone
E-mail
Social network
Web

Email Format ▼

* Email john@xyzmail.com

* From Date 5/22/23 📅

To Date m/d/yy 📅

OK Cancel

Step 9. On the **Edit Contacts** page, click the **Save and Close** button.

Image

Edit Contacts: Account 19002

Save Save and Close Cancel

Actions View Format Wrap + + ✎ ✕ ✓

	Primary Contact	First Name	Last Name	Phone	Contact Address
▶		aplnjayjbc	aaaaranfqd		123 SMITH STREET, ABERDEEN NORTH CAROLINA, 28315, MOORE, US
▶		John	Smith		

Columns Hidden 5

Step 10. The **Edit Account** page opens. On the **Edit Account** page, click the **Save and Close** button.

Image

Edit Account: 19002 ?

Save Save and Close Cancel

Organization Information

* Name O2C DHHS Test Customer

Registry ID 97059

D-U-N-S Number

Taxpayer Identification Number

Account Information

Account Number 19002

Provider # Test O2C

Step 11. The **Manage Customers** page opens. On the **Manage Customers** page, click the **Done** button.

Image

Manage Customers ?

Customer Type Organization

Search

Advanced Saved Search Search Using Account Details

Search Results

Actions View Format + Wrap

	Registry ID	Organization Name	D-U-N-S Number	Country	Primary Address
	97059	O2C DHHS Te...		US	123 SMITH ST,RALEIGHNC,27613,DURHAM,US

Columns Hidden 5

Note: You are now redirected to the **Billing** page.

Wrap-Up

Manage communications with customers through E-mail, phone, social network, or the web using the steps above.

Additional Resources

- Virtual Instructor-Led Training (VILT)
 - [AR100: Customer Maintenance](#)

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