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.

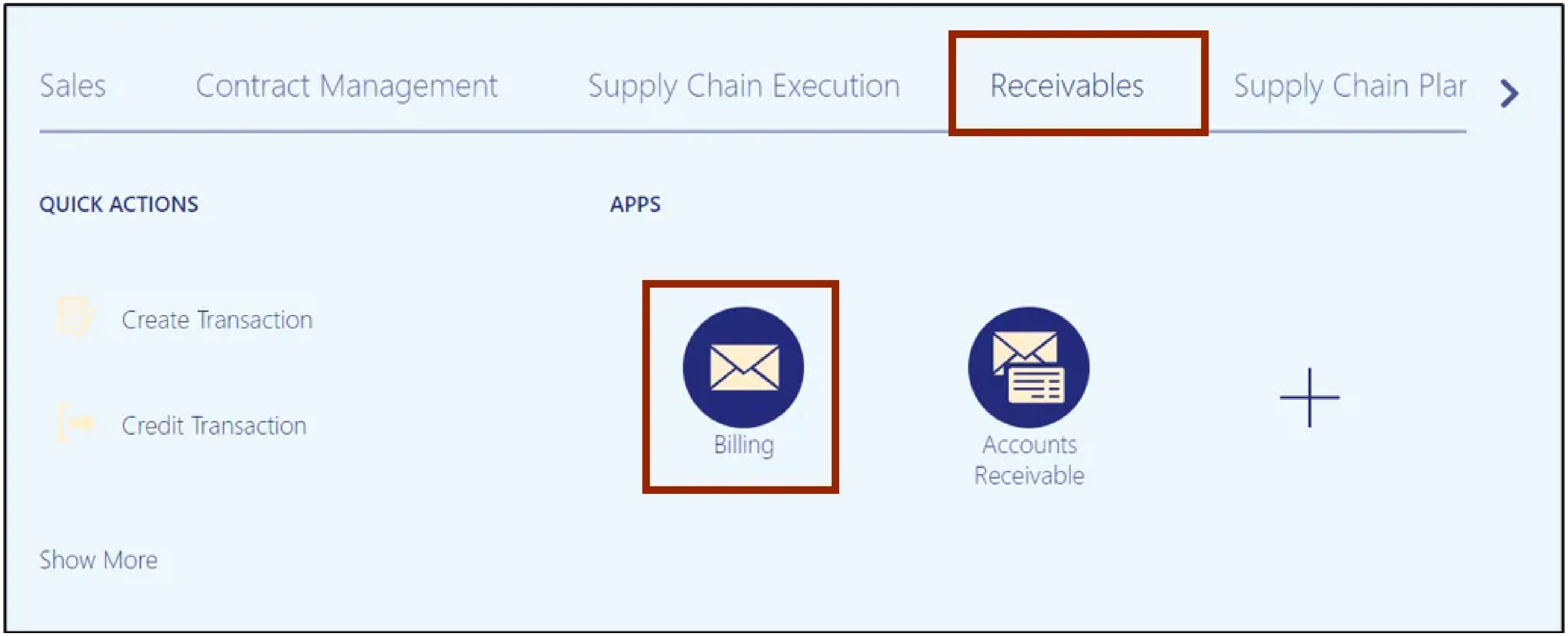
Manage Communications with Customers

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.

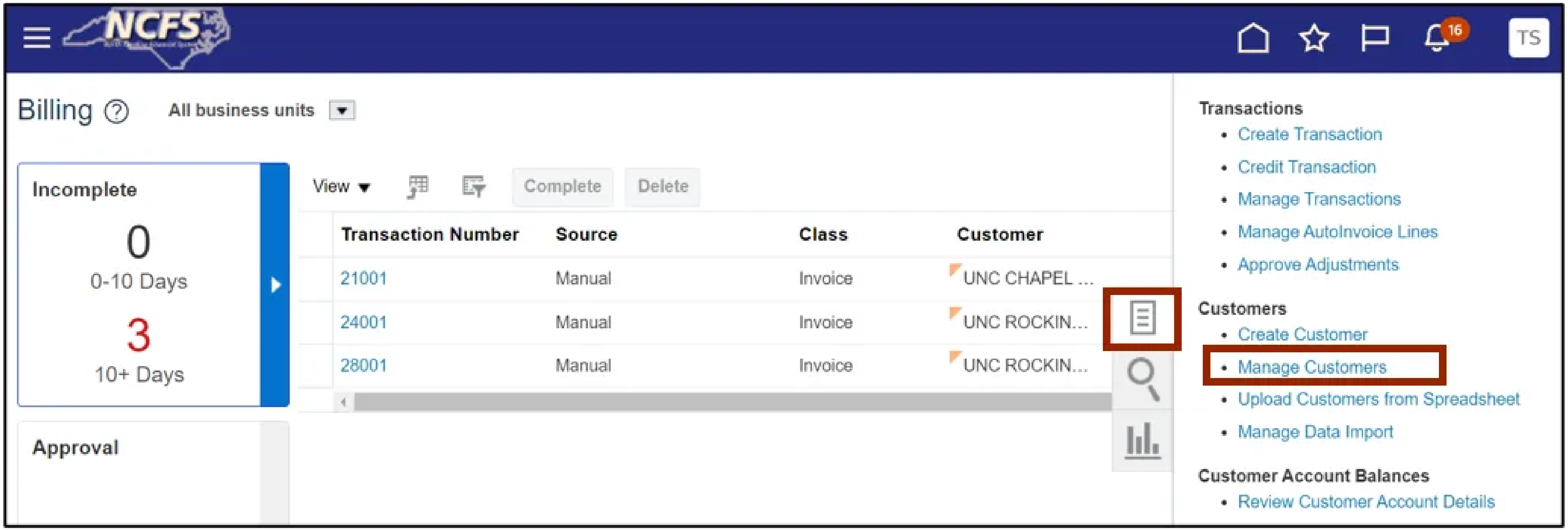
Step 2. On the **Home** page, click the **Receivables** tab and click the **Billing** app.

Image



Step 3. On the **Billing** page, click the **Tasks** icon and click **Manage Customers**.

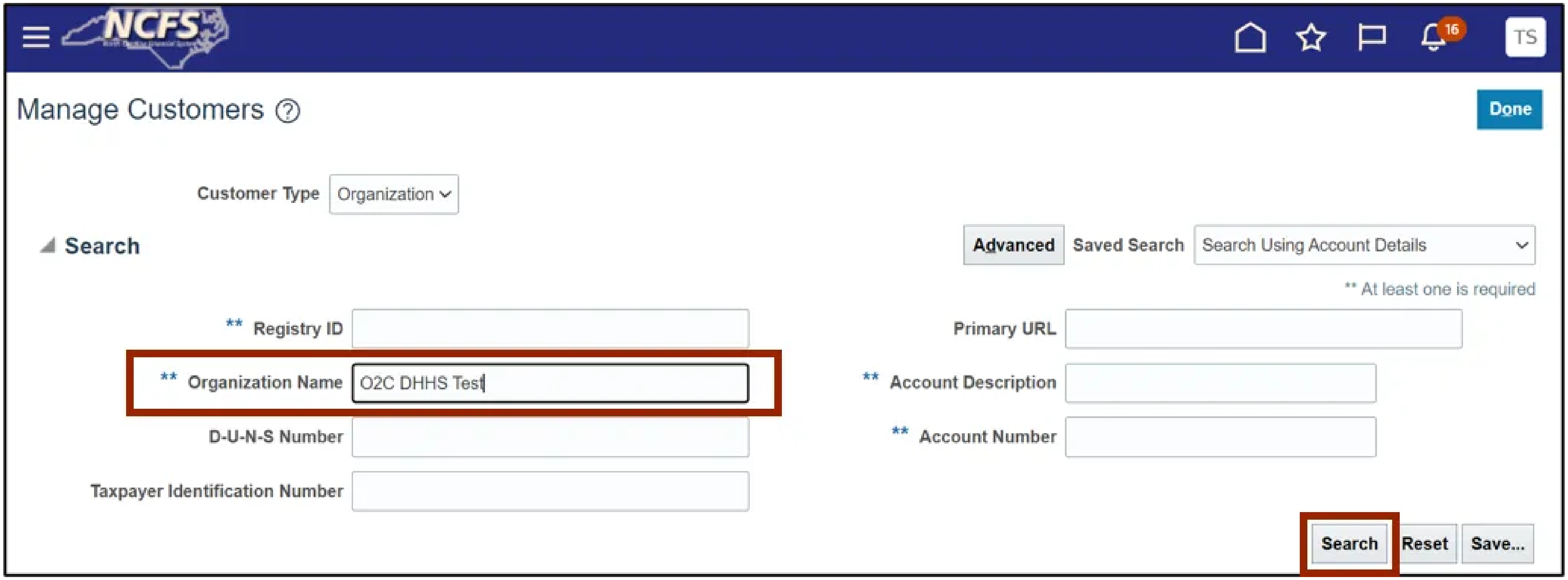
Image



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**.

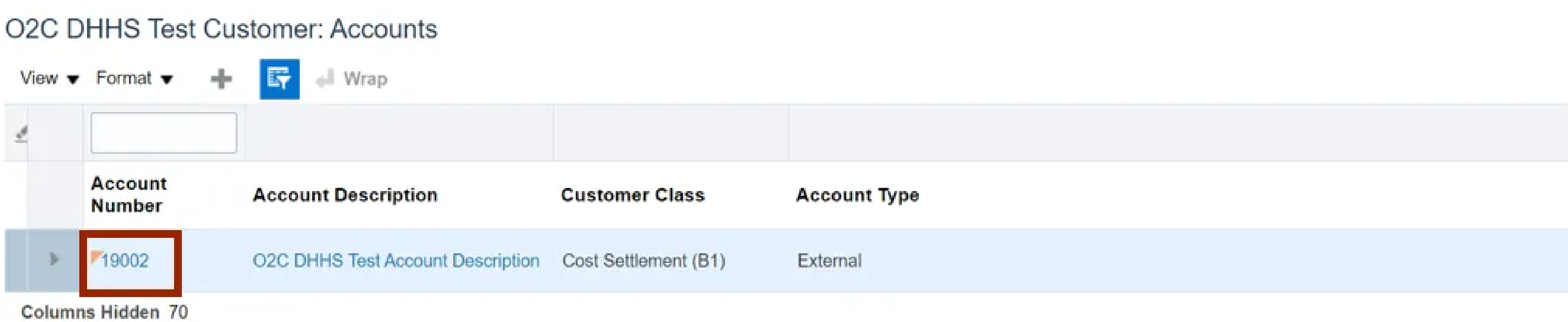
Image



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

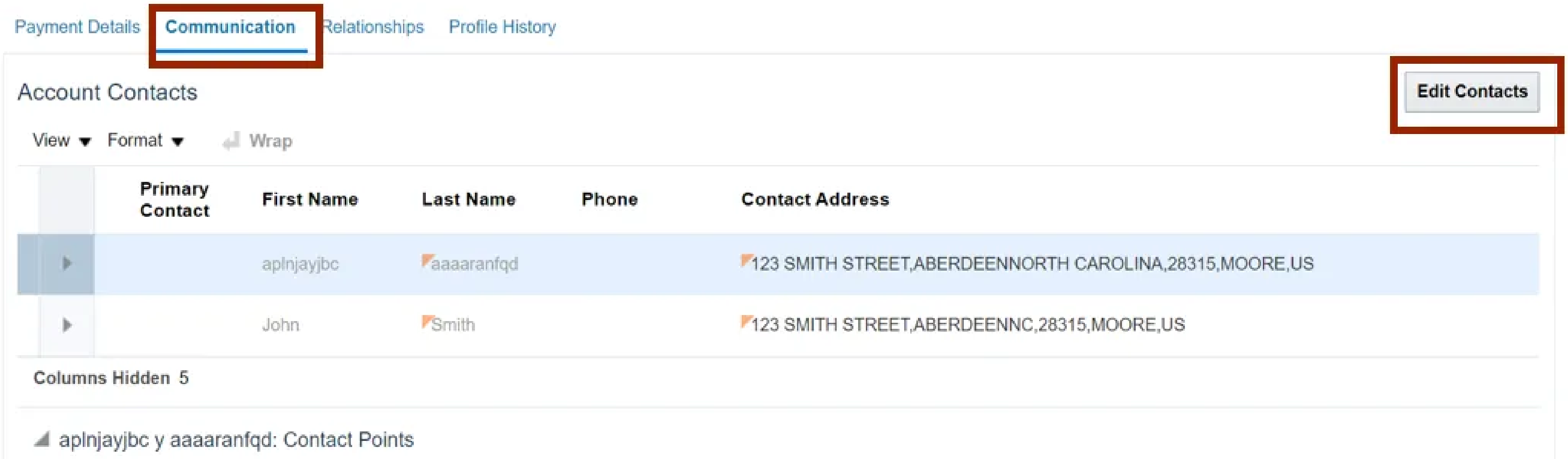
In this example, we choose **19002**.

Image



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

Image



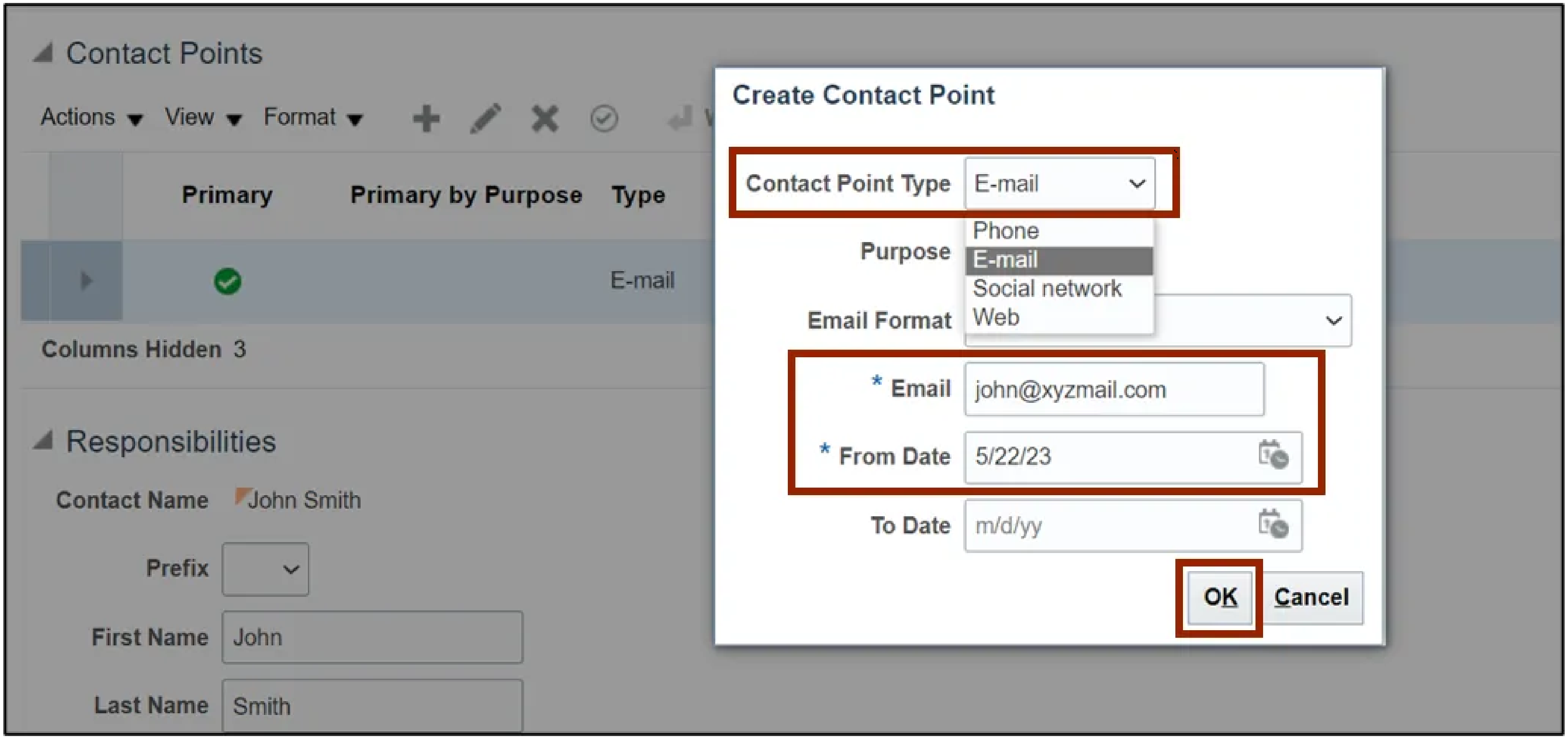
Step 7. The **Edit Contacts** page opens. On the ***Contact Points*** section, click the **Plus** icon to create a contact point.

Image

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.

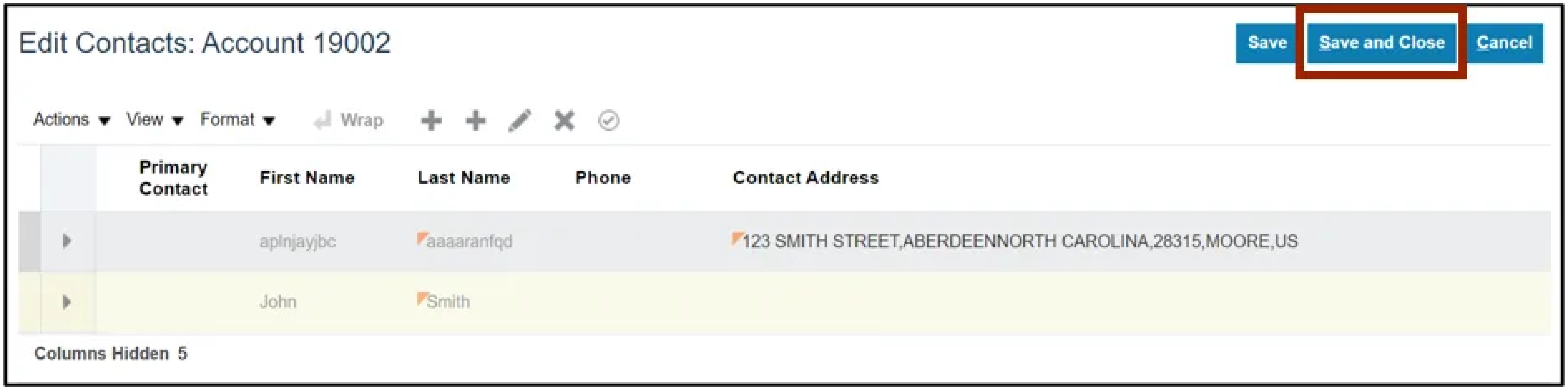
In this example, choose **E-mail for *Contact Point Type*, john@xyzmail.com** for ***Email address*** and **5/22/23** for ***From Date***.

Image



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

Image

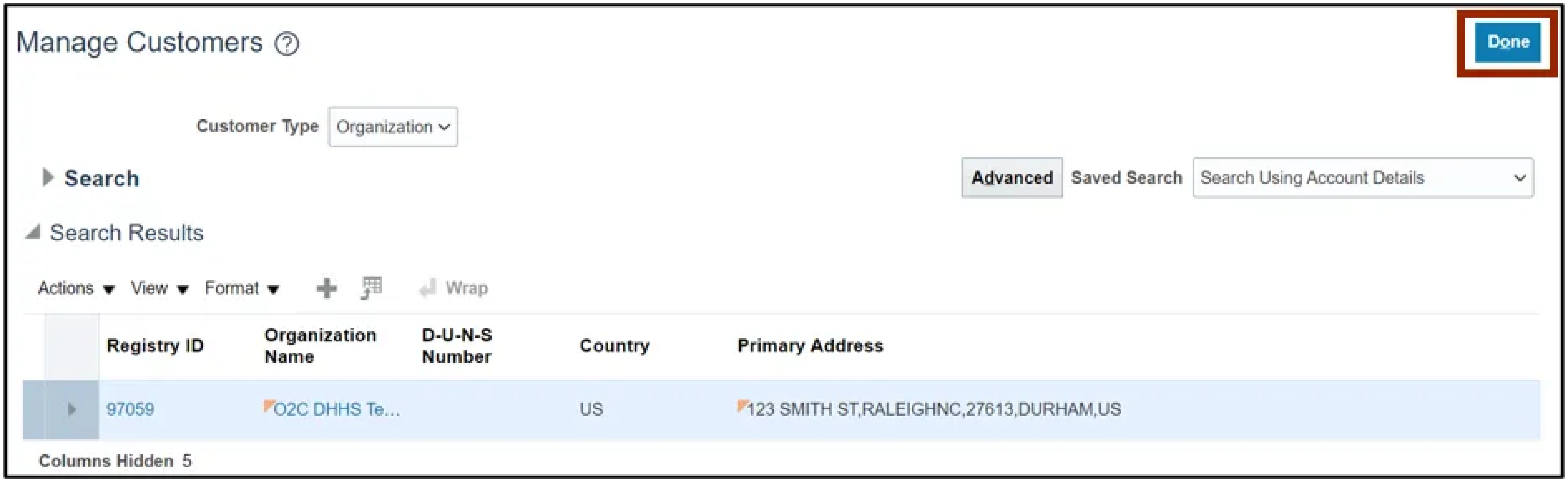


Step 10. The **Edit Account** page opens. On the **Edit Account** page, click the **Save and Close** button.

Image

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

Image



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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