MANAGING CUSTOMER COMMUNICATION

OTC

QUICK REFERENCE GUIDE AR-02

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

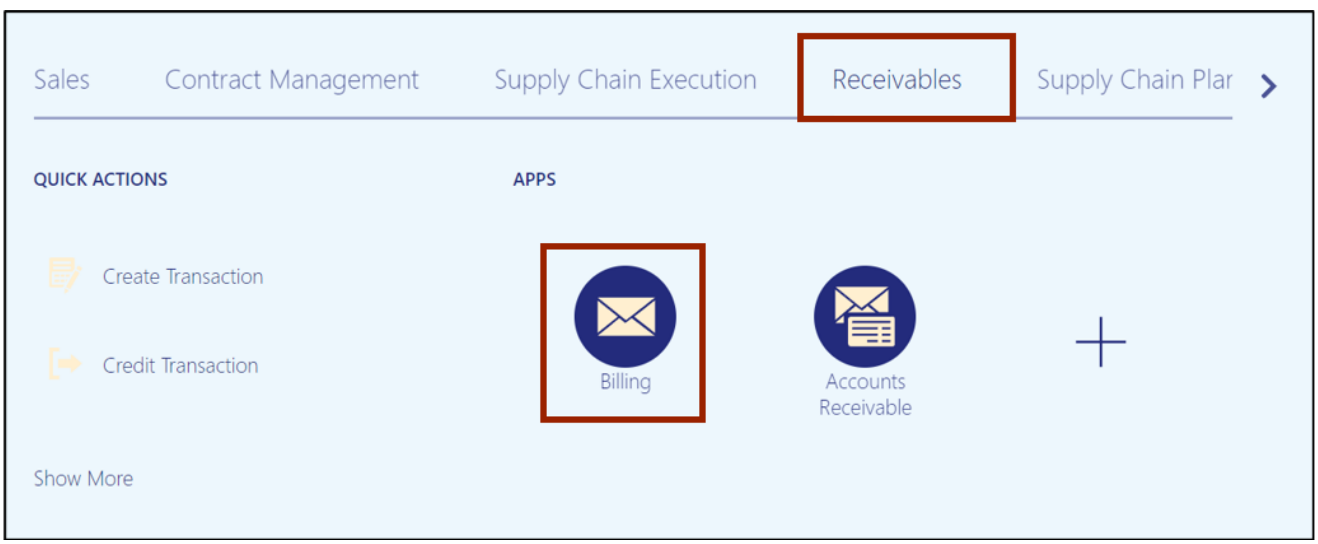
This QRG covers the steps to manage customer communication through Phone or E-mail in NCFS. This process will help in maintaining up-to-date and accurate customer details and provide detailed customer information.

Manage Communications with Customers

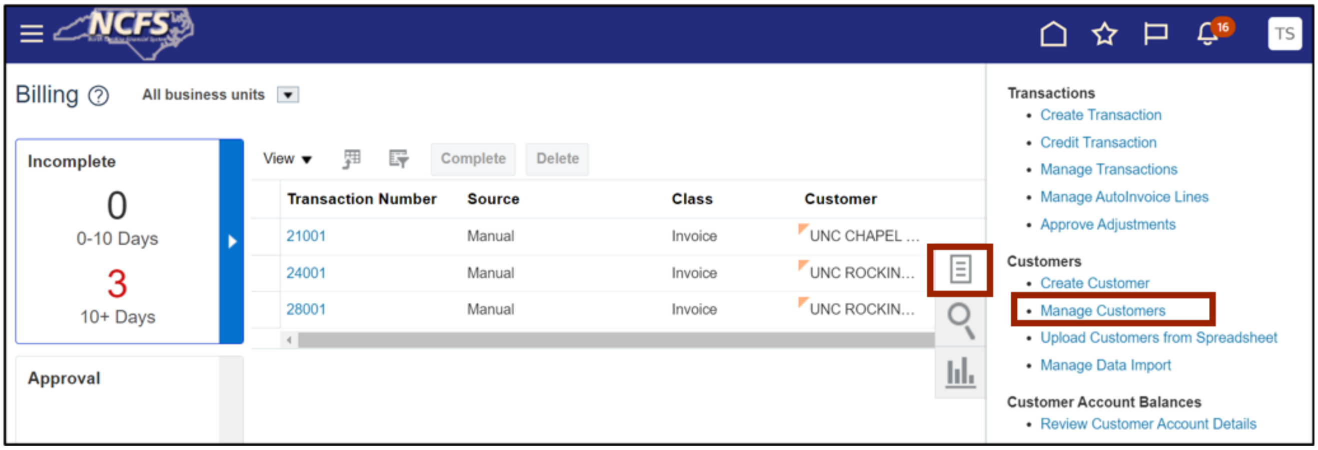
To manage communications with customers in NCFS, please follow the steps below:

1. Log in to the NCFS portal with your credentials to access the system.

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

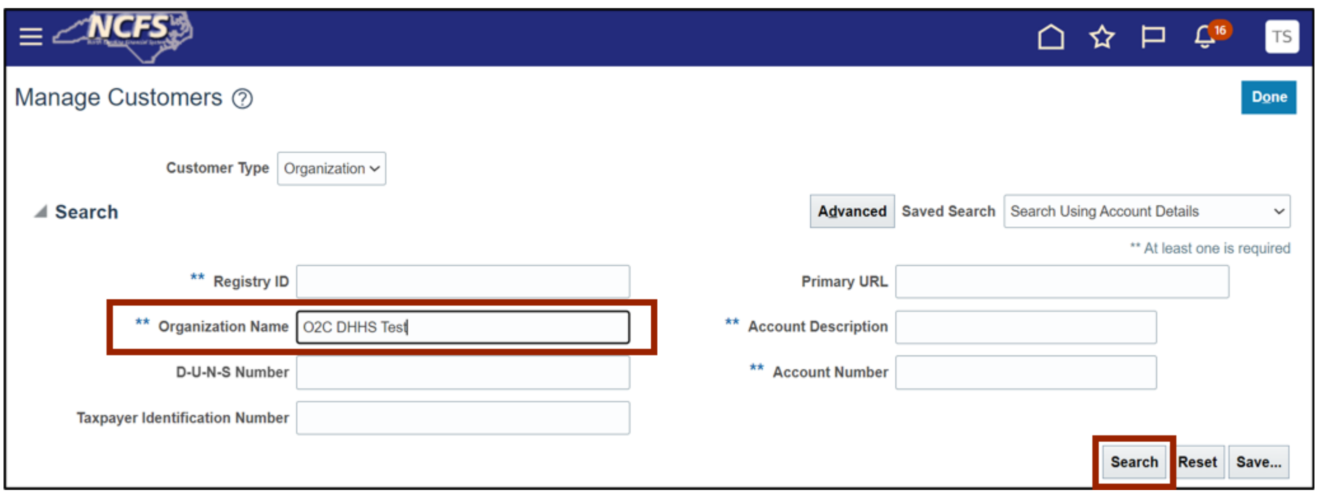


3. On the **Billing** page, click the **Tasks [ ]** icon and click **Manage Customers.**



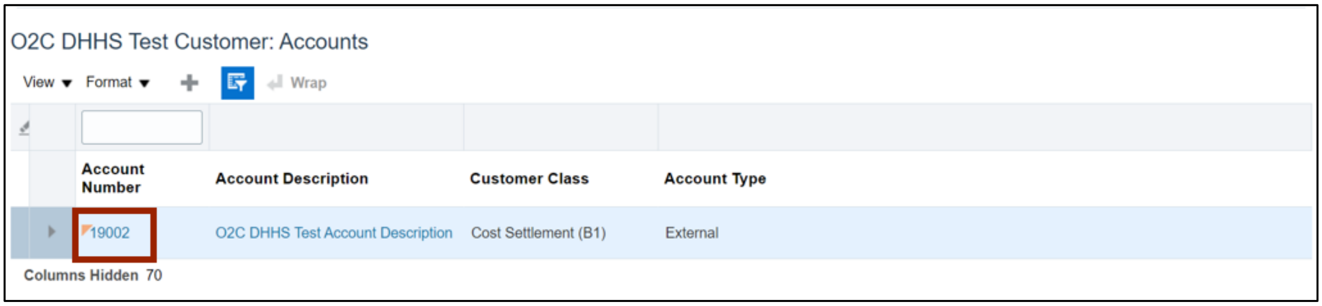
4. The **Manage Customers** page opens. On the ***Search*** section, enter the **Organization Name** and click the **Search** button.

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

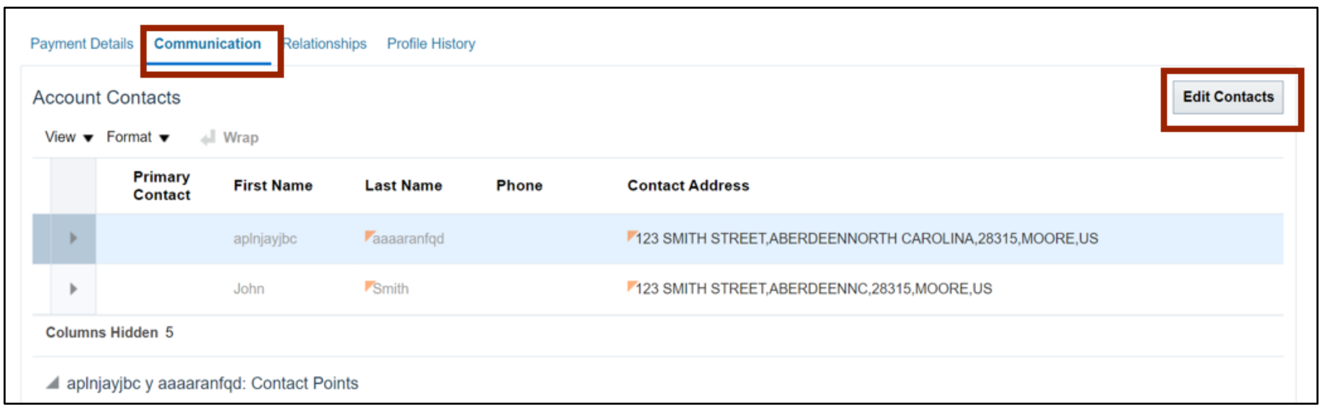


5. Scroll down to the ***Accounts*** section. Click the **Account Number** to open an account.

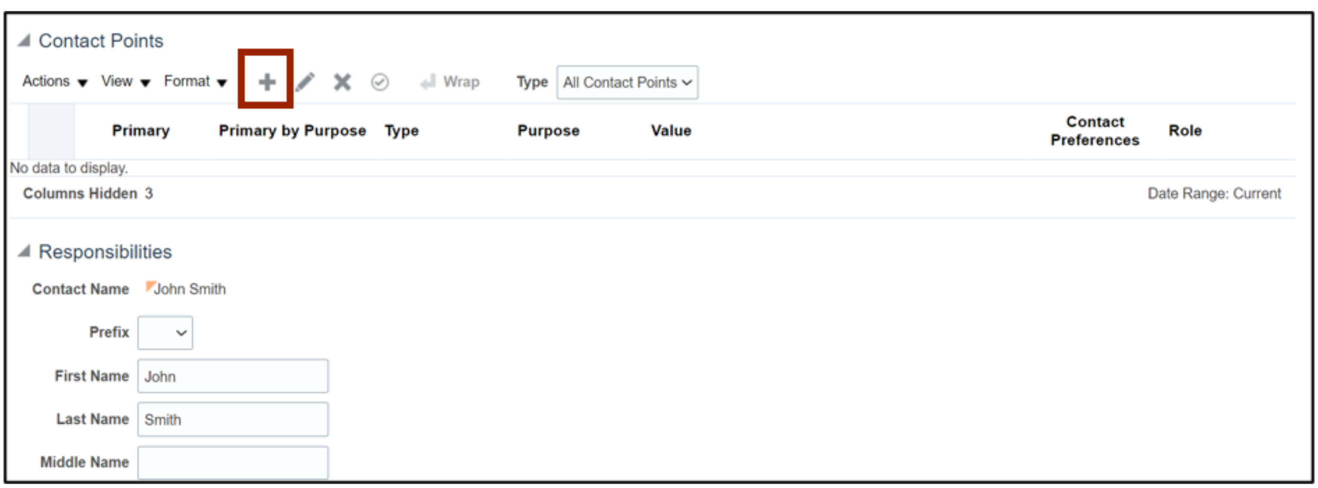
   In this example, we choose **19002.**



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

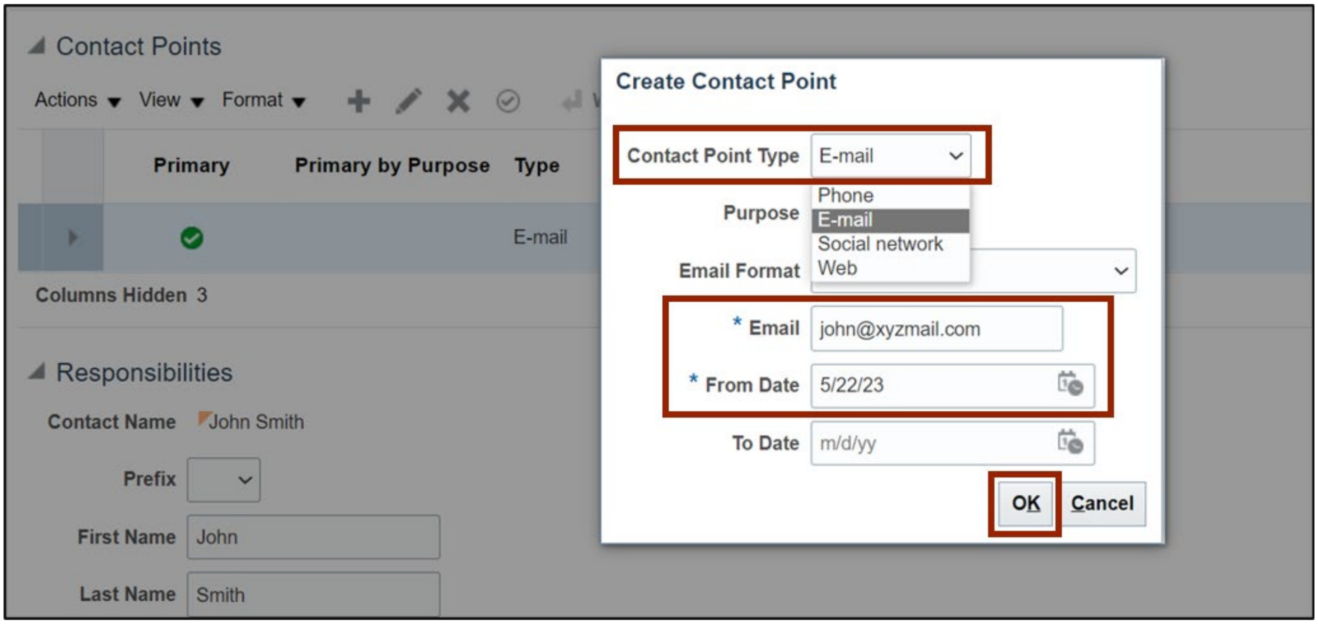


7. The **Edit Contacts** page opens. On the ***Contact Points*** section, click the **Plus [+]** icon to create a contact point.

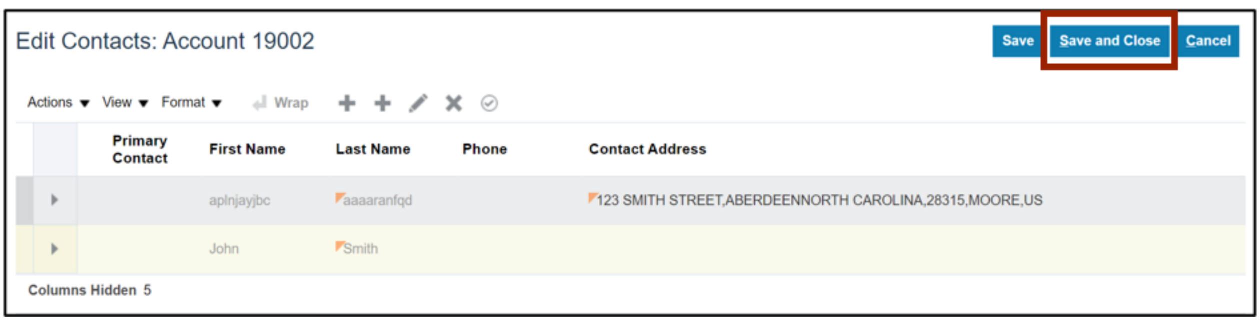


8. The ***Create Contact Point*** pop-up appears. Select the ***Contact Point Type*** from the drop-down choice list and enter ***Email*** address and ***From Date***. Click the **OK** button.

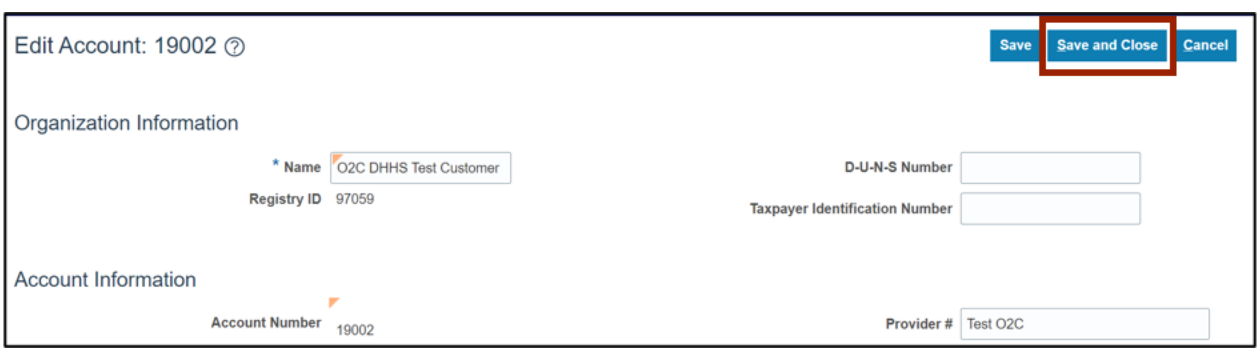
   In this example, choose **E-mail for *Contact Point Type***, **john@xyzmail.com** for ***Email* address** and **5/22/23** for **From Date.**



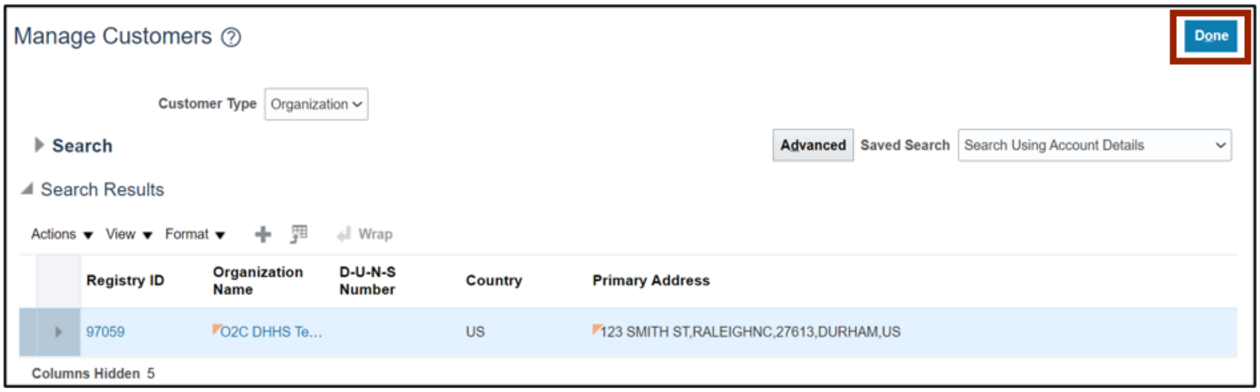
9. On the **Edit Contacts** page, click the **Save and Close** button.



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



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



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