



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).

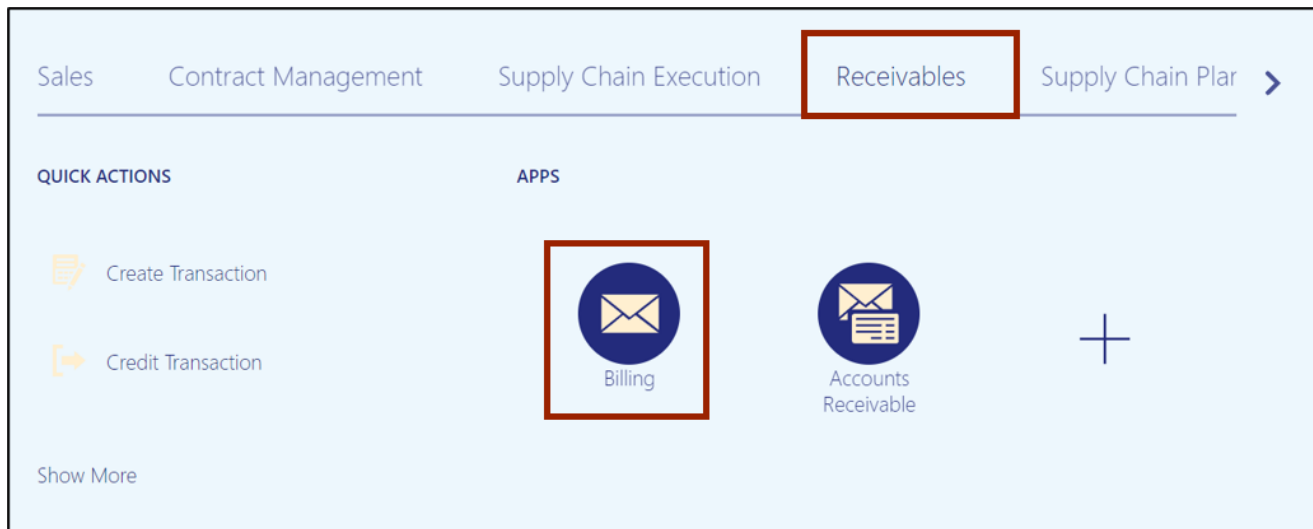
Introduction and Overview

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.

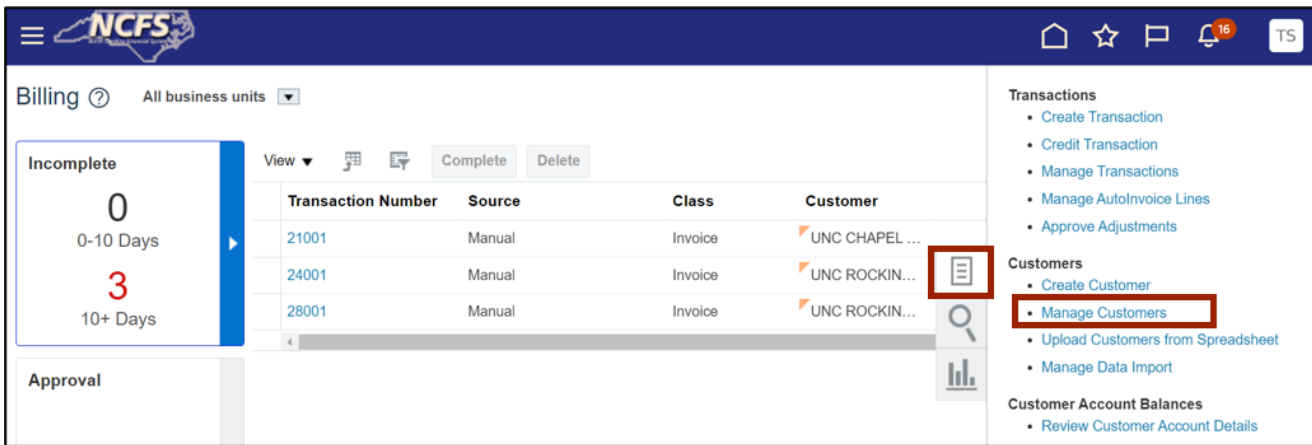
Manage Communications with Customers

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**.



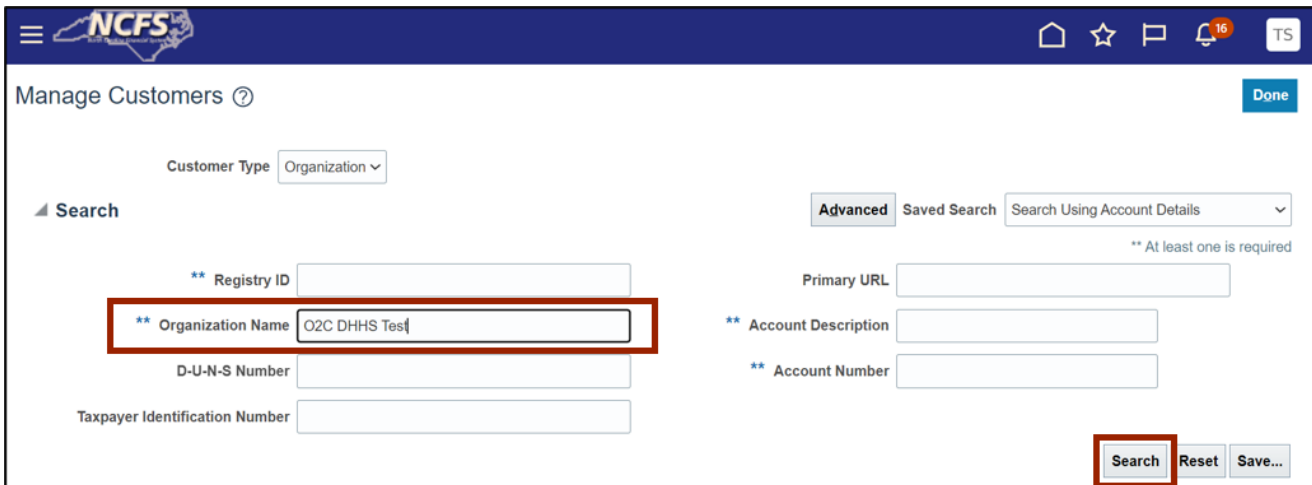
The screenshot shows the NCFS Billing interface. On the left, there are summary cards for 'Incomplete' (0 in 0-10 Days, 3 in 10+ Days) and 'Approval'. The main area is a table of transactions:

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

On the right sidebar, under 'Customers', the 'Manage Customers' option is highlighted with a red box.

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**.



The screenshot shows the 'Manage Customers' page. The 'Search' section contains the following fields:



- Customer Type: Organization
- Registry ID: (empty)
- Organization Name: O2C DHHS Test (highlighted with a red box)
- D-U-N-S Number: (empty)
- Taxpayer Identification Number: (empty)
- Primary URL: (empty)
- Account Description: (empty)
- Account Number: (empty)

The 'Search' button is highlighted with a red box at the bottom right of the form.

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

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

O2C DHHS Test Customer: Accounts

View ▾ Format ▾ +  


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

Columns Hidden 70

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


Payment Details **Communication** Relationships Profile History

Account Contacts **Edit Contacts**

View ▾ Format ▾ 





Primary Contact	First Name	Last Name	Phone	Contact Address
aplnjayjbc	aaaranfqd			123 SMITH STREET,ABERDEENNORTH CAROLINA,28315,MOORE,US
John	Smith			123 SMITH STREET,ABERDEENNC,28315,MOORE,US

Columns Hidden 5

 aplnjayjbc y aaaranfqd: Contact Points

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

Contact Points

Actions ▾ View ▾ Format ▾ **+**     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

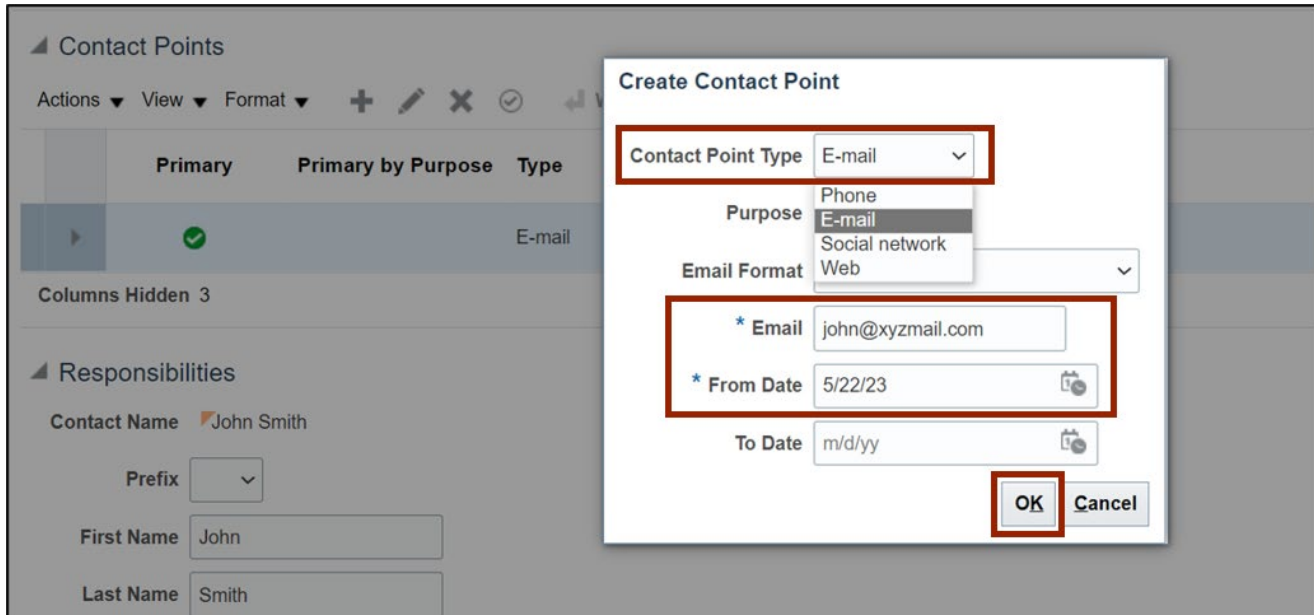
First Name

Last Name

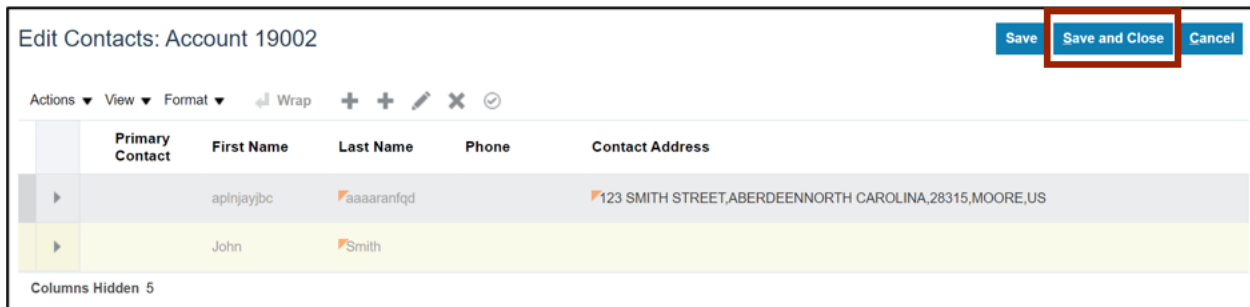
Middle Name

- 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.

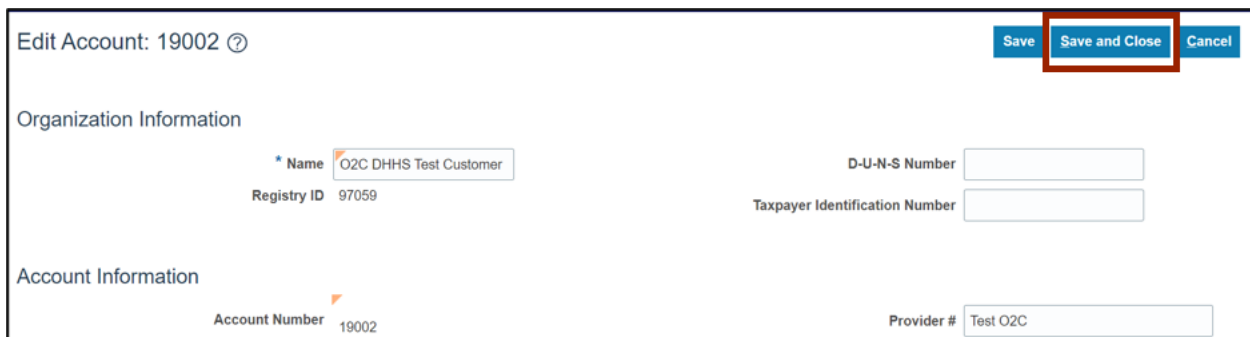
In this example, choose **E-mail** for **Contact Point Type**, **john@xyzmail.com** for **Email address** and **5/22/23** for **From Date**.



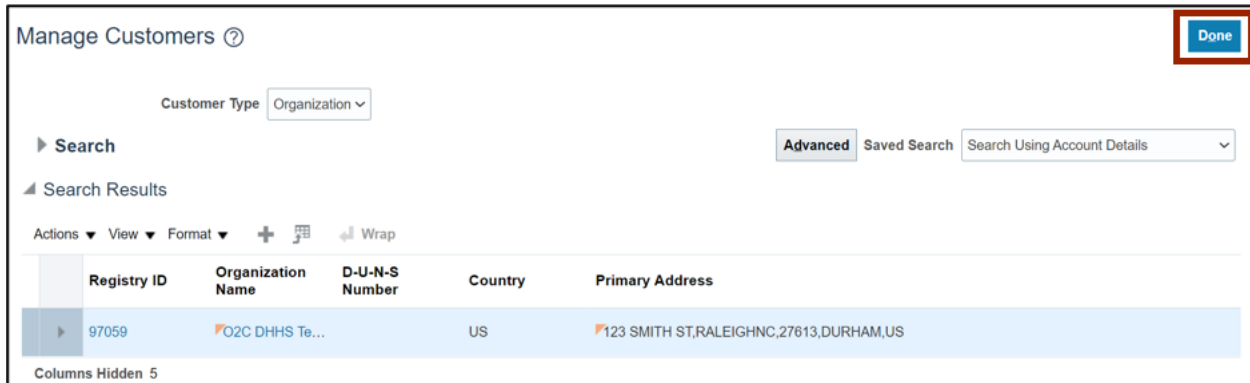
- On the **Edit Contacts** page, click the **Save and Close** button.



- 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