

This Document is to demonstrate how to add a customer conversation. Should you have questions, need assistance with, or find errors with this document please contact billingarhelp@usf.edu for assistance.

Customer Conversations Overview

Customer Conversations is a feature to enter comments or conversations held with customers or with others regarding customer account items. Conversations is also a way to attach copies of email or scanned copies of correspondence to/from customers. Conversations are helpful when attempting to do collections and to provide information to the central area through conversations. Conversations may also be used for different types of conversations or for notes in regards to actions taken on the customer account.

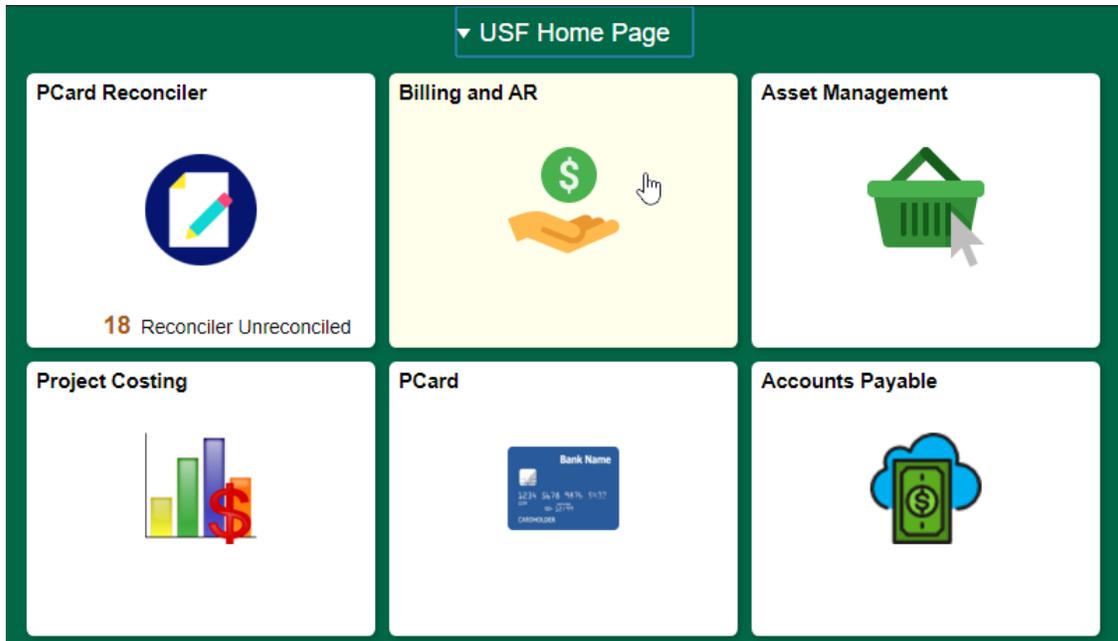
It is important to remember when entering a customer conversation to not use any derogatory or inflammatory remarks regarding the customer/debtor. Should a customer/debtor have used such remarks with you do not enter the actual statement in the conversation. Notate elsewhere the exact words said. In the conversation in the system, enter an approximation of the conversation such as "The customer then used several expletives and said several derogatory statements towards me."

Never under any circumstances should you put any sensitive information in a conversation. Sensitive information are social security numbers, credit card numbers, or other types of information like this.

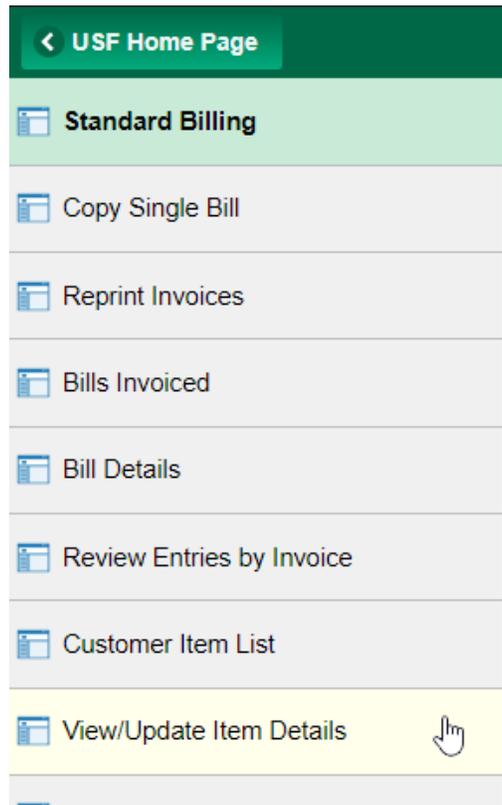
There are three ways to enter Conversations

1. From the View/Update Items Detail Page when reviewing a specific Item.
2. The Customer Item List when selecting a specific item to review.
3. In the Navigator. You can also use this to review all conversations for a customer.

1. View/Update Item Details Page Conversation Entry



From the Home Screen click on the Billing and AR Tile and select from the Navigation Collection on the left the View/Update Item Details option.



Search for the specific item you wish to enter a conversation about. If presented with a list, select the appropriate item from the listing.

View/Update Item Details

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit =

Customer ID begins with

Item ID begins with

Item Line =

Item Status =

Credit Analyst begins with

Collector begins with

Purchase Order Reference begins with

Document ID begins with

Bill of Lading begins with

Contract begins with

Case Sensitive

Basic Search

Search Results

View All 1-3 of 3

Business Unit	Customer ID	Item ID	Item Line	Item Status	Credit Analyst	Collector	Purchase Order Reference	Document ID	Bill of Lading	Contract
USF01	DJV1001	DJV-00004	0	Closed	DVANDERM	DVANDERM	(blank)	(blank)	(blank)	(blank)
USF01	DJV1001	<u>DJV-00004CR</u>	0	Open	DVANDERM	DVANDERM	(blank)	DJV-00004	(blank)	(blank)
USF01	DJV1001	DJV-00004RB	0	Closed	DVANDERM	DVANDERM	(blank)	DJV-00004CR	(blank)	(blank)

On the screen presented click the Add Conversation link at the bottom of the page just above the buttons.

Split Item Action Add Conversation

Detail 1 | [Detail 2](#) | [Detail 3](#) | [Item Activity](#) | [Item Accounting Entries](#) | [Item Audit History](#)

You will be presented with a message like this. Click OK.

If you transfer before you SAVE all new or modified input will be lost ! Click Ok to transfer without saving, otherwise click Cancel. (6000,1421)

At the top of the page enter a Description of the conversation. You may need to abbreviate to make enough fit and be meaningful.

There are various options to select for the Subject and Sub-Topic. Depending on what is selected for the subject will determine the options available for the Sub-Topic. If a department determines there is a need for an additional Subject or Sub-Topic please submit a request to billingarhelp@usf.edu for review and consideration.

Conversations References

SetID USFSI Business Unit USF01 Customer DJV1001 DJV TESTING CUSTOMER
 *Status New *Description Customer Called Regarding Refu
 Subject ACCOUNT BALANCE Account Balance Sub-Topic OVERPAYMENT Overpayment

Look Up Subject ✕

[Help](#)

Search Results

View 100 1-8 of 8

Conversation Subject	Description
(blank)	(blank)
<u>ACCOUNT BALANCE</u>	Account Balance
CONTACT INFORMATION	Contact information
CREDITS	Credits
INITIAL CALL	Initial Customer Call
MISCELLANEOUS	Miscellaneous
PAYMENT	Payment
WRITE-OFF	Write-off

The next section has several parts. We will only concern ourselves with the Promise of Payment.

Promise of Payment Attachments Exist

Review

Date Review Days

User ID Done

Supervisor Review

Follow Up

Action Done

User ID Done

Letter Date

Reference Totals

Amount

Currency USD

Promise Date

Only select Promise of Payment If a customer has promised to make a payment. When Promise of Payment is selected the section changes. Enter the information in the appropriate fields to reflect the various information the customer provides to you about the promise to pay. Also remember to select a confidence level. If the customer/debtor has broken promises of payment before or if they sound unsure about it then go with a lower level of confidence. If the customer/debtor has always kept their word you would want to go with a higher level of confidence.

Promise of Payment

Promise of Payment

Promise Date	<input type="text"/>	Promise Amount	<input type="text" value="0.00"/>	Currency	<input type="text" value="USD"/>
Tolerance Days	<input type="text" value="0"/>	Payment Tolerance	<input type="text" value="0"/> %	Confidence	<input type="text" value="Medium"/>
Broken Promise Action	<input type="text"/>	User ID	<input type="text"/>	<input type="checkbox"/> Done	
<input type="checkbox"/> Override Promise Status		Override Reason	<input type="text"/>	Promise Status	<input type="text" value="None"/>

Promise Review

Date	<input type="text"/>	Action	<input type="text"/>	User ID	<input type="text"/>	<input type="checkbox"/> Done
<input type="checkbox"/> Supervisor Review						

Follow Up

Letter	<input type="text"/>	Date	<input type="text"/>	<input type="checkbox"/> Done
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If a department wishes to use the Promise Review feature they may. This is not a necessary component to enter a promise to pay. However, if the department wishes to utilize the Promise Review section they should contact billingarhelp@usf.edu to help understand how this is used and what security roles are necessary to be used with this area. If a department wishes to use other features of this section please contact the billingarhelp@usf.edu address for assistance.

Promise of Payment

Promise Date	<input type="text" value="07/05/2020"/>	Promise Amount	<input type="text" value="1,000.00"/>	Currency	<input type="text" value="USD"/>
Tolerance Days	<input type="text" value="0"/>	Payment Tolerance	<input type="text" value="0"/> %	Confidence	<input type="text" value="Medium"/>
Broken Promise Action	<input type="text"/>	User ID	<input type="text"/>	<input type="checkbox"/> Done	
<input type="checkbox"/> Override Promise Status		Override Reason	<input type="text"/>	Promise Status	<input type="text" value="None"/>

Promise Review

Date	<input type="text"/>	Action	<input type="text"/>	User ID	<input type="text"/>	<input type="checkbox"/> Done
<input type="checkbox"/> Supervisor Review						

Follow Up

Letter	<input type="text"/>	Date	<input type="text"/>	<input type="checkbox"/> Done
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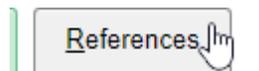
The next section is where the conversation is to be entered. Never select the Customer Visible Option. Enter as much as possible regarding the conversation held with the customer.

Conversation Entries

1 of 1 | View All

Origin	<input type="text" value="Internal"/>	<input type="checkbox"/> Customer Visible	<input type="checkbox"/> Send Email	Email DateTime	
Contact ID	<input type="text"/>	Telephone	Extension		
Email ID					
Comments	<input type="text" value="Customer called inquiring about refund for items not delivered. Advised customer refund request was submitted yesterday and may take up to 2 weeks for them to receive payment."/>				

Next select the References tab.



The item you used to navigate to the conversation screen should already be referenced.

Conversations **References**

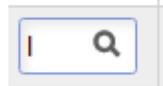
SetID USFSI Business Unit USF01 Customer DJV1001 DJV TESTING CUSTOMER
Date 05/16/2020 Description Customer Called Regarding Refu Status New
Subject ACCOUNT BALANCE Subject Topic OVERPAYMENT Include Closed Information

Related Transactions

1-1 of 1 View All

Qualifier	Reference ID	Reference Business Unit	Customer ID / Deposit ID	Item Line		
I	DJV-00004CR	USF01	DJV1001		View Item Activity	+ -

Should you want to reference an additional customer Item with this conversation, check the Include Closed Information Check box, click the Plus sign to the right, enter I in the Qualifier field, then tab out of the field.



When you tab out of the field, more fields should open on the screen.

I					View Item Activity	+ -
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In the Item ID Field enter the Bill Source for the item you wish to reference. If it's an On Account Payment you would want to enter OA. Then click the magnifying glass also known as the lookup icon.

DJV						
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On the look up screen enter the Customer ID you are adding the conversation to. Then click Search. Once your listing has narrowed down, locate the other item. If need be you can also enter the exact Item ID in the Item ID look up field to only retrieve that item.

Look Up Reference ID ×

Help

Item ID begins with ▼

Business Unit begins with ▼

Customer ID begins with ▼

Search
Clear
Cancel
Basic Lookup

Search Results

View 100 ◀ ◀ 1-11 of 11 ▶ ▶

Item ID	Item Line	Business Unit	Customer ID	Entry Type	Item Balance	Currency Code - Bal Amount
DJV-00001	0	USF01	DJV1001	IN	0	USD
DJV-00001CR	0	USF01	DJV1001	CR	0	USD
DJV-00001RB	0	USF01	DJV1001	IN	0	USD
DJV-00002	0	USF01	DJV1001	IN	2170	USD
DJV-00003	0	USF01	DJV1001	IN	2751.56	USD
DJV-00004	0	USF01	DJV1001	IN	0	USD
DJV-00004CR	0	USF01	DJV1001	CR	-839.51	USD
DJV-00004RB	0	USF01	DJV1001	IN	0	USD
DJV-00005	0	USF01	DJV1001	IN	13394.93	USD
DJV-00006	0	USF01	DJV1001	IN	1000	USD
DJV-00007	0	USF01	DJV1001	IN	1125	USD

Repeat these steps until all items you wish to select are included.

Conversations **References** Attachments Help

SetID USFSI Business Unit USF01 Customer DJV1001 DJV TESTING CUSTOMER
 Date 05/16/2020 Description Customer called regarding refu Status New
 Subject ACCOUNT BALANCE Subject Topic OVERPAYMENT Include Closed Information

Related Transactions

Qualifier	Reference ID	Reference Business Unit	Customer ID / Deposit ID	Item Line		
I	DJV-00004	USF01	DJV1001		View Item Activity	+ -
I	DJV-00004RB	USF01	DJV1001		View Item Activity	+ -
I	DJV-00004CR	USF01	DJV1001		View Item Activity	+ -

OK Cancel Apply

[Conversations](#) | [References](#) | [Attachments](#)

If you have attachments, click on the Attachments tab.



Once here click on the Attach Button to navigate to the file to attach. **ONLY ATTACH PDF DOCUMENTS!** If the document is in another format other users may not be able to open it. This is most important with email correspondence as security settings may not allow central to view the emails.

Document Attachments

Attached File	Description	
		Attach

File Attachment ✕

[Help](#)

Choose File No file chosen

◀ ▶

Document Attachments

Attached File	Description	
EMAIL.pdf		Delete View +

Return

OK Cancel Apply

Click the Plus sign to the right to add additional documents and repeat the steps to attach the document.

Once finished click OK. You should be taken back to the View/Update Item Details Screen. You should now see a View/Update Conversations link. Clicking this link will take you to a screen to review the conversations related to this item.



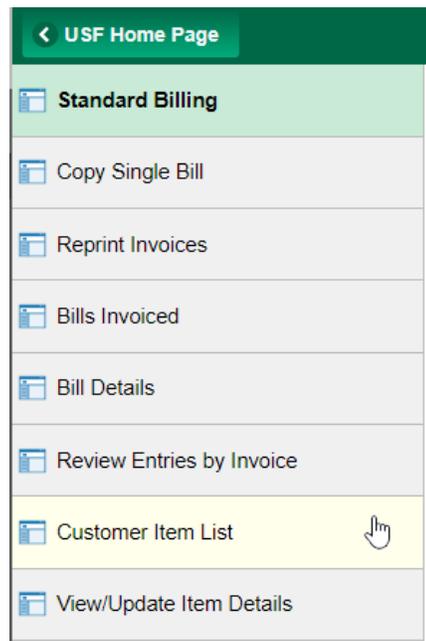
Should you need to add another conversation to the same item, for example a second phone call with the customer, you may click the Add Conversation link and add another conversation.



2. Customer Item List Conversation Entry

Just like the View/Update Item Details page you can add conversations directly from items in the Customer Item List screen. The pages used to enter the conversation are identical to the ones in the View/Update Item Details pages. Word of advice, when using this method do not use your escape button as you will lose all your work.

Click on the Customer Item List.



Enter the Business Unit and Customer ID for the Customer Account you wish to review and click Search.

You will be presented with a listing of Open Customer Items.

The screenshot shows the 'Item List' interface. At the top, there are search filters: SetID (USFSI), Unit (USF01), Customer (DJV1001), and *Level (No Relationship). A 'Search' button is present. Below the filters are 'Row Selection' and 'Item Action' controls. The main table lists items with columns: Seq Nbr, Select, Item, Line, Activities, Unit, Customer ID, Status, Terms, Entry Type, and Entry Reason.

Seq Nbr	Select	Item	Line	Activities	Unit	Customer ID	Status	Terms	Entry Type	Entry Reason
1	<input type="checkbox"/>	DJV-00002			1 USF01	DJV1001	Open	IMMED	IN	
2	<input type="checkbox"/>	DJV-00003			1 USF01	DJV1001	Open	IMMED	IN	
3	<input type="checkbox"/>	DJV-00004CR			2 USF01	DJV1001	Open	IMMED	CR	
4	<input type="checkbox"/>	DJV-00005			1 USF01	DJV1001	Open	IMMED	IN	
5	<input type="checkbox"/>	DJV-00006			1 USF01	DJV1001	Open	IMMED	IN	

In the listing, select the item you wish to add a conversation to.



On the pop-up screen select Add Conversation.



Click OK on the pop-up message.



Start entering the information as you would with the other methods.

Conversations | References Help

SetID USFSI Business Unit USF01 Customer DJV1001 DJV TESTING CUSTOMER

*Status New *Description Discussed Past Due Balance

Subject Sub-Topic

Promise of Payment

Review

Date Review Days

User ID Done

Supervisor Review

Follow Up

Action Done

User ID Letter Date

Reference Totals

Amount

Currency

Promise Date

Created On 05/16/20 8:42:19AM Created By ACONNIFF Last Modified On 05/16/20 8:42AM Modified By ACONNIFF

Keywords

Keyword1 Keyword2 Keyword3

Add Conversation Entry

Conversation Entries 1 of 1 | View All

Origin Internal Contact ID

Customer Visible Send Email Email DateTime

Delete Entry Edit Entry

Don't forget to select a Subject and Sub-Topic!

Subject

Promise of Payment

Conversations | References Help

SetID USFSI Business Unit USF01 Customer DJV1001 DJV TESTING CUSTOMER

*Status New *Description Discussed Past Due Balance

Subject ACCOUNT BALANCE Account Balance Sub-Topic MISCELLANEOUS Miscellaneous

Promise of Payment

Remember to fill out the Promise of Payment information if you select the Promise of Payment check box and select a confidence level.

Promise of Payment

Promise of Payment

Promise Date Promise Amount Currency

Tolerance Days Payment Tolerance % Confidence

Broken Promise Action User ID Done

Override Promise Status Override Reason Promise Status

Promise Review

Promise Review

Date Action User ID Done

Supervisor Review

Follow Up

Letter Date Done

Look Up Reference ID ✕

[Help](#)

Item ID begins with ▼

Business Unit begins with ▼

Customer ID begins with ▼

Search
Clear
Cancel
Basic Lookup

Search Results

View 100 ◀ ◀ 1-6 of 6 ▶ ▶

Item ID	Item Line	Business Unit	Customer ID	Entry Type	Item Balance	Currency Code - Bal Amount
DJV-00002	0	USF01	DJV1001	IN	2170	USD
DJV-00003	0	USF01	DJV1001	IN	2751.56	USD
DJV-00004CR	0	USF01	DJV1001	CR	-839.51	USD

Conversations
References
Attachments

SetID USFSI Business Unit USF01 Customer DJV1001 DJV TESTING CUSTOMER
 Date 05/16/2020 Description Discussed Past Due Balance Status New
 Subject ACCOUNT BALANCE Subject Topic MISCELLANEOUS Include Closed Information

Related Transactions ◀ ◀ 1-2 of 2 ▶ ▶ | View All

Qualifier	Reference ID	Reference Business Unit	Customer ID / Deposit ID	Item Line		
I	<input type="text" value="DJV-00003"/>	<input type="text" value="USF01"/>	<input type="text" value="DJV1001"/>	<input type="text"/>	View Item Activity	+ -
I	<input type="text" value="DJV-00002"/>	<input type="text" value="USF01"/>	<input type="text" value="DJV1001"/>	<input type="text"/>	View Item Activity	+ -

Finally click on the Attachments tab and add any necessary attachments. Once finished click OK.

Help

Conversations References **Attachments**

SetID USFSI Business Unit USF01 Customer DJV1001 DJV TESTING CUSTOMER
 Date 05/16/2020 Description Discussed Past Due Balance Status New
 Subject ACCOUNT BALANCE Subject Topic MISCELLANEOUS

Document Attachments

🔍 Q 1-1 of 1 View All

Attached File	Description			
EMAIL.pdf		Delete	View	+

Return

OK Cancel Apply

Then click OK on the next screen.

Direct Debit Profile ID Create Document?
 One Item per Draft?

Item Creation/Update Details

Created On 04/24/2020 1:35PM
 Created By DVANDERM

Split Item Action Add Conversation View/Up

OK Cancel Apply

On the Customer Item list screen, you should now see in the Conv column a speech bubble like from a cartoon. This means a conversation exists. You can review the conversation by clicking on the item and the clicking the View/Update Conversations link.

Seq Nbr	Select	Item	Line	Activities	Conv	Conversation Exists?	Un
1	<input type="checkbox"/>	DJV-00002			1	Y	US
2	<input type="checkbox"/>	DJV-00003			1	Y	US
3	<input type="checkbox"/>	DJV-00004CR			2		US

Split Item Action Add Conversation View/Update Conversations

OK Cancel Apply

3. Navigator Conversation Entry/Customer Conversation Reviews

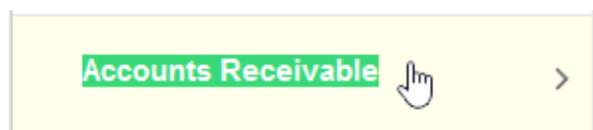
The third and final method is in the Navigator and NOT in the Billing and AR Tile Navigation Collection.

Click on the compass in the upper right of the home screen then click on the Navigator.



Then in Navigator Press Ctrl+f. Depending on the browser will depend on where the search field appears. Enter Accounts Receivable in the box and then enter. It should take you the Accounts Receivable option.

Once located Click on Accounts Receivable>Customer Interactions>Conversations>View/Update Conversations



Once you click View/Update Conversations you should be presented with a page which has two tabs. Find an Existing Value and Add a New Value.

Entering the SetID, Business Unit, and Customer ID and clicking Search will present you with a listing of all the conversations in the system for the customer.

View/Update Conversations

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing ValueAdd a New Value

▼ Search Criteria

SetID	= ▼	<input style="width: 95%;" type="text" value="USFSI"/> 🔍
Business Unit	= ▼	<input style="width: 95%;" type="text" value="USF01"/> 🔍
Cust ID	begins with ▼	<input style="width: 95%;" type="text" value="DJV1001"/> 🔍
Customer Name	begins with ▼	<input style="width: 95%;" type="text"/>
Status	= ▼	<input style="width: 95%;" type="text"/>
Item ID	begins with ▼	<input style="width: 95%;" type="text"/> 🔍
Invoice	begins with ▼	<input style="width: 95%;" type="text"/> 🔍
Contract	begins with ▼	<input style="width: 95%;" type="text"/> 🔍
Bill of Lading	begins with ▼	<input style="width: 95%;" type="text"/> 🔍
Purchase Order Reference	begins with ▼	<input style="width: 95%;" type="text"/> 🔍
Payment ID	begins with ▼	<input style="width: 95%;" type="text"/> 🔍
Order No	begins with ▼	<input style="width: 95%;" type="text"/> 🔍
Subject	begins with ▼	<input style="width: 95%;" type="text"/> 🔍
Subject Topic	begins with ▼	<input style="width: 95%;" type="text"/> 🔍
Promise Date	= ▼	<input style="width: 95%;" type="text"/> 📅

Case Sensitive

SearchClear[Basic Search](#) [Save Search Criteria](#)

Business Unit	Cust ID	Customer Name	Description	Conversation Date	Status	Number of Entries	Attachments	Item ID	Subject	Subject Topic	Amount Referenced	Promise Amount	Promise Date	Promise Status
<u>USF01</u>	DJV1001	DJV TESTING CUSTOMER	Customer called regarding refu	05/16/2020	New	1	Y	DJV-00004	ACCOUNT BALANCE	OVERPAYMENT	-839.51	0	(blank)	None
USF01	DJV1001	DJV TESTING CUSTOMER	Customer called regarding refu	05/16/2020	New	1	Y	DJV-00004CR	ACCOUNT BALANCE	OVERPAYMENT	-839.51	0	(blank)	None
USF01	DJV1001	DJV TESTING CUSTOMER	Customer called regarding refu	05/16/2020	New	1	Y	DJV-00004RB	ACCOUNT BALANCE	OVERPAYMENT	-839.51	0	(blank)	None
USF01	DJV1001	DJV TESTING CUSTOMER	Discussed Past Due Balance	05/16/2020	New	1	Y	DJV-00002	ACCOUNT BALANCE	MISCELLANEOUS	2170	1000	05/30/2020	None
USF01	DJV1001	DJV TESTING CUSTOMER	Discussed Past Due Balance	05/16/2020	New	1	Y	DJV-00003	ACCOUNT BALANCE	MISCELLANEOUS	2170	1000	05/30/2020	None

Clicking on the Add a New Value tab will allow you to add a new conversation by clicking on the Add Button.

View/Update Conversations

Find an Existing Value
Add a New Value

SetID

Business Unit

Customer ID

Add

The addition of conversations in these screens are exactly like those you would see in the View/Update Item Details and Customer Item List screens. The only difference here is when you select the references tab no references are pre-selected as you are not navigating to these screens from an item.

[END]