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.

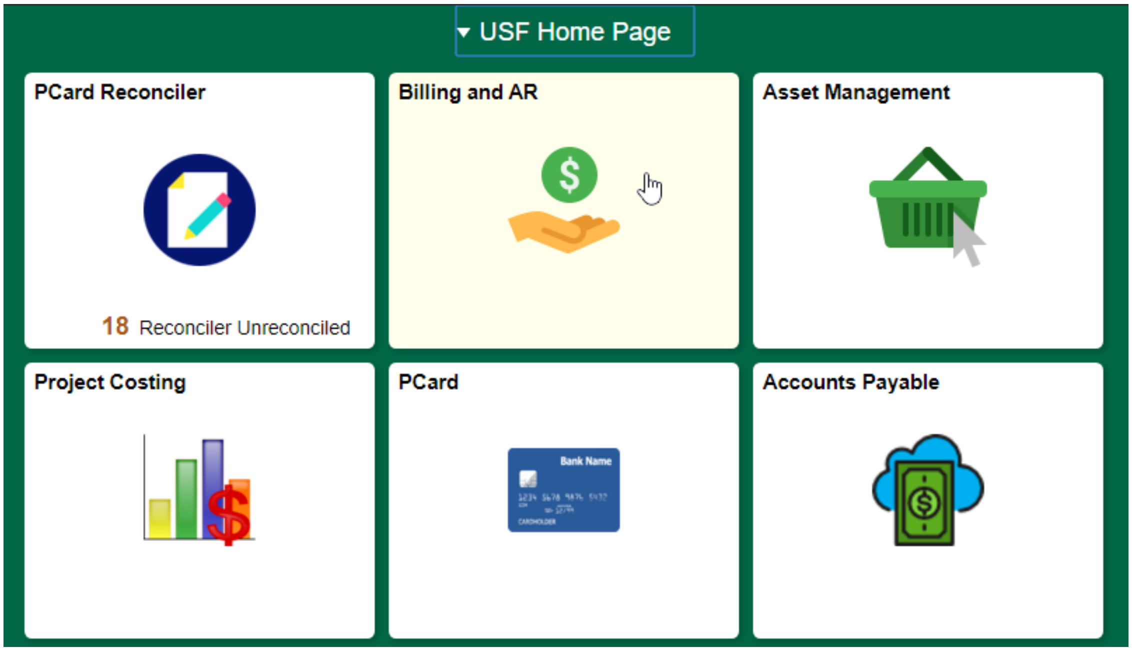
It is important to remember when entering a customer conversation to not use any derogatory or inflammatory remarks regarding the customer/debtor. Should a customer/debtor have used such remarks with you do not enter the actual statement in the conversation. Notate elsewhere the exact words said. In 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.

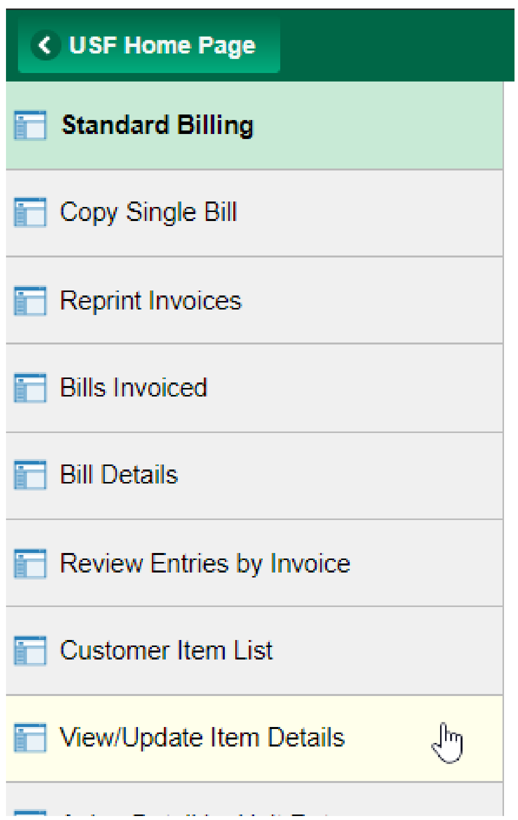
There are three ways to enter Conversations

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.

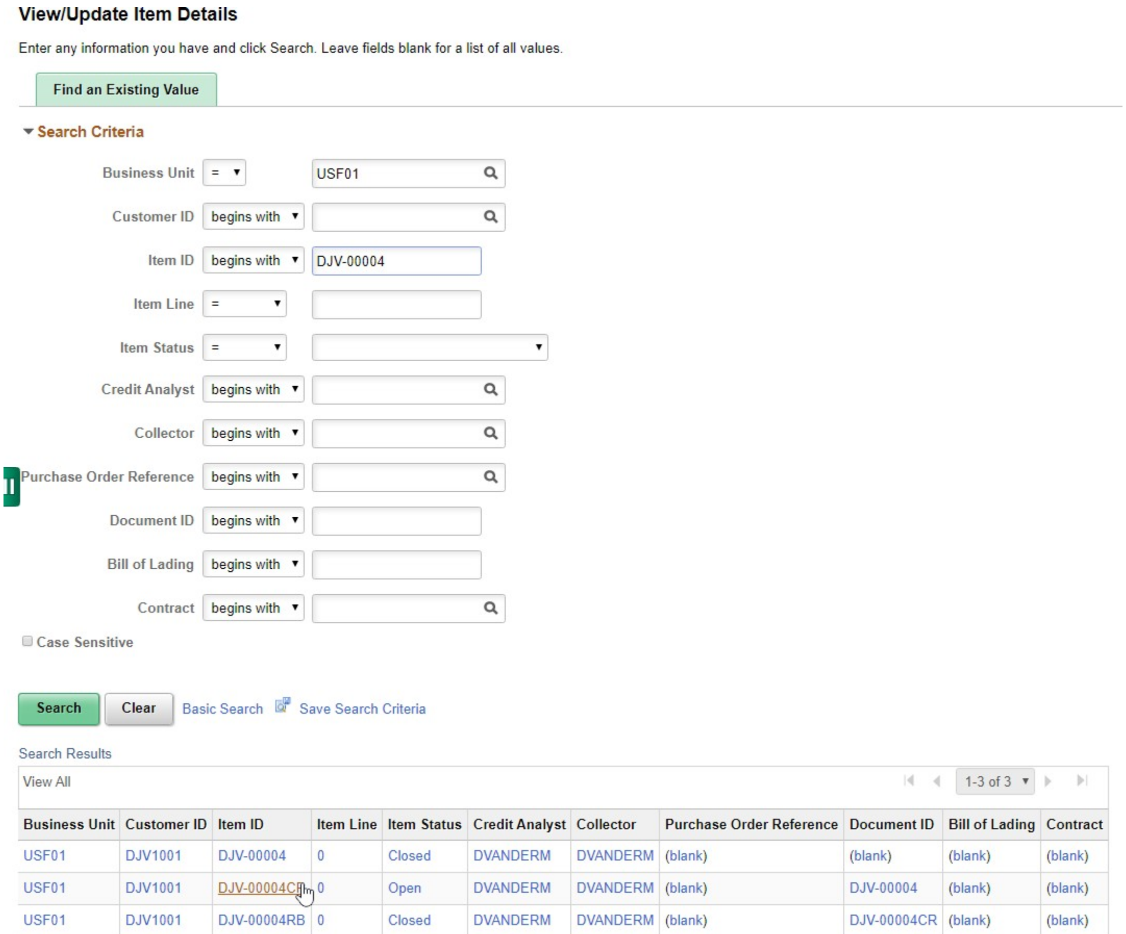
1. View/Update Item Details Page Conversation Entry



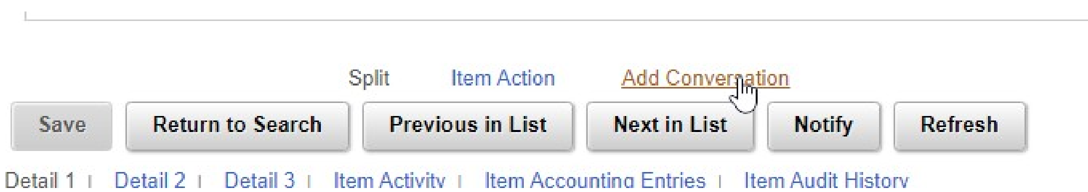
From the Home Screen click on the Billing and AR Tile and select from the Navigation Collection on the left the View/Update Item Details option.



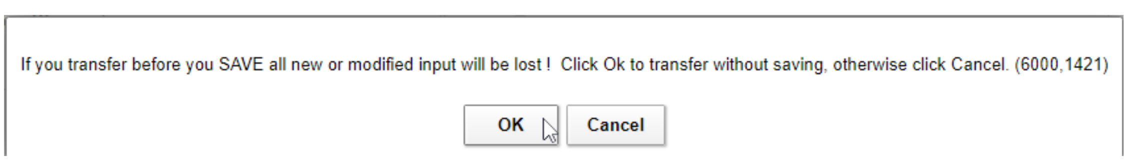
Search for the specific item you wish to enter a conversation about. If presented with a list, select the appropriate item from the listing.



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

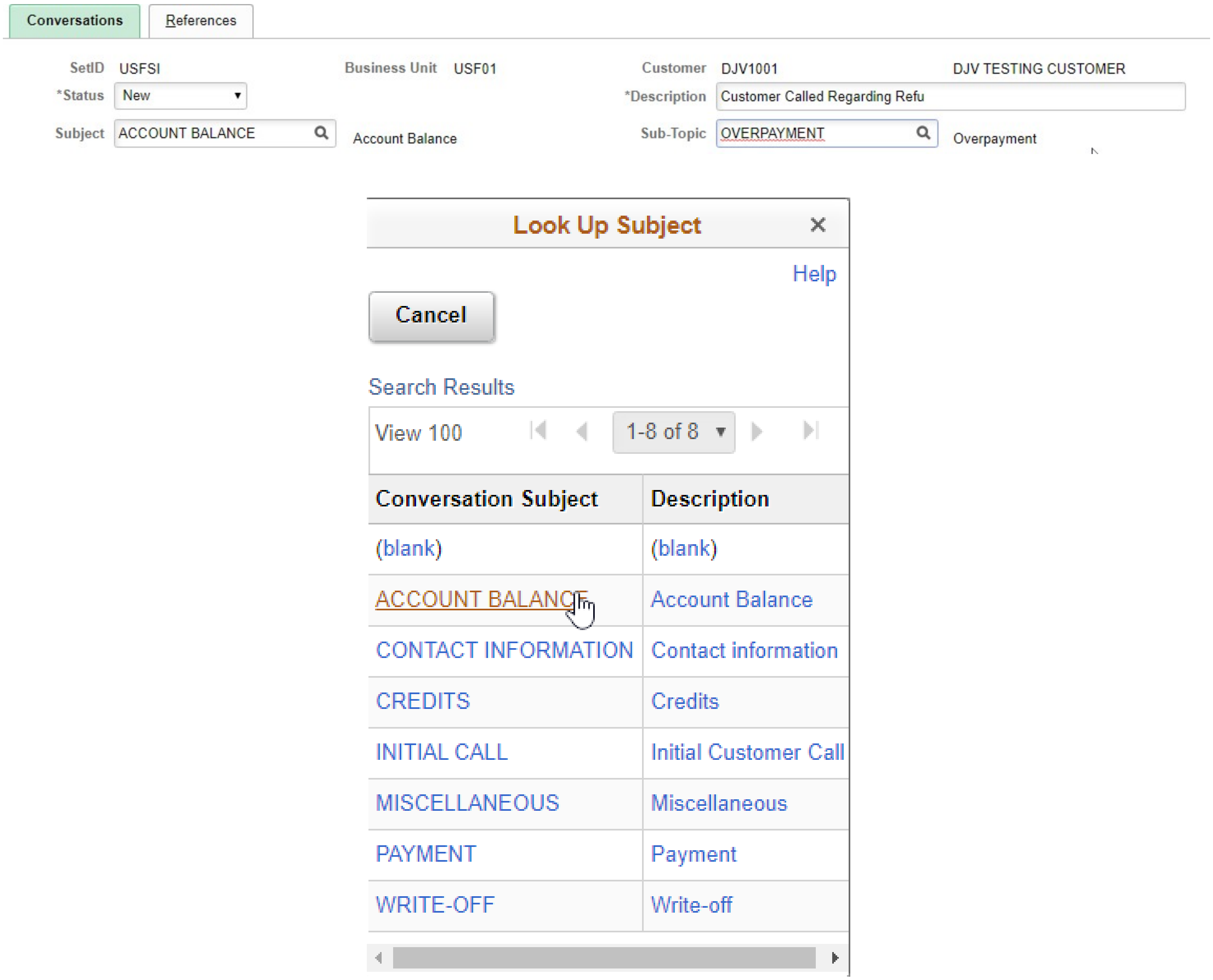


You will be presented with a message like this. Click OK.

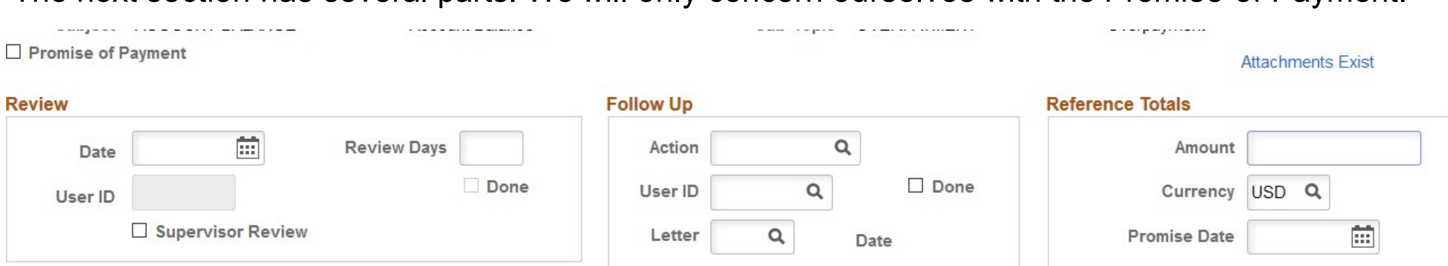


At the top of the page enter a Description of the conversation. You may need to abbreviate to make enough fit and be meaningful.

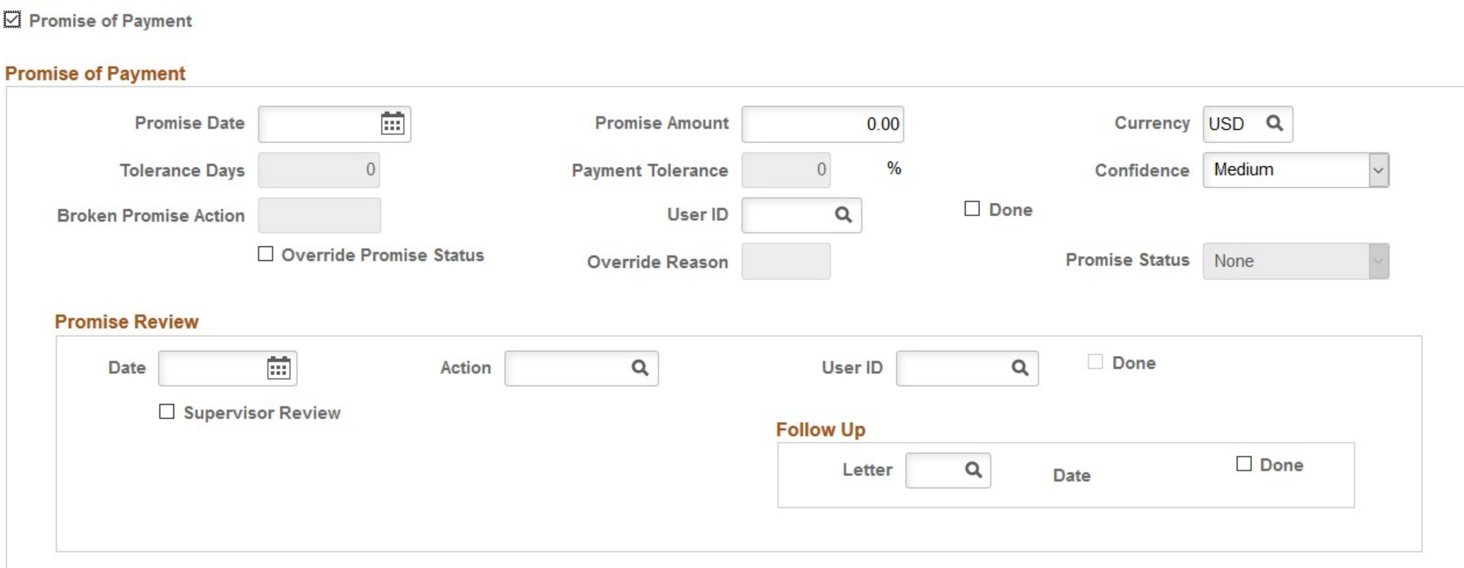
There are various options to select for the Subject and Sub-Topic. Depending on what is selected for the subject will determine the options available for the Sub-Topic. If a department determines there is a need for an additional Subject or Sub-Topic please submit a request to billingarhelp@usf.edu for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



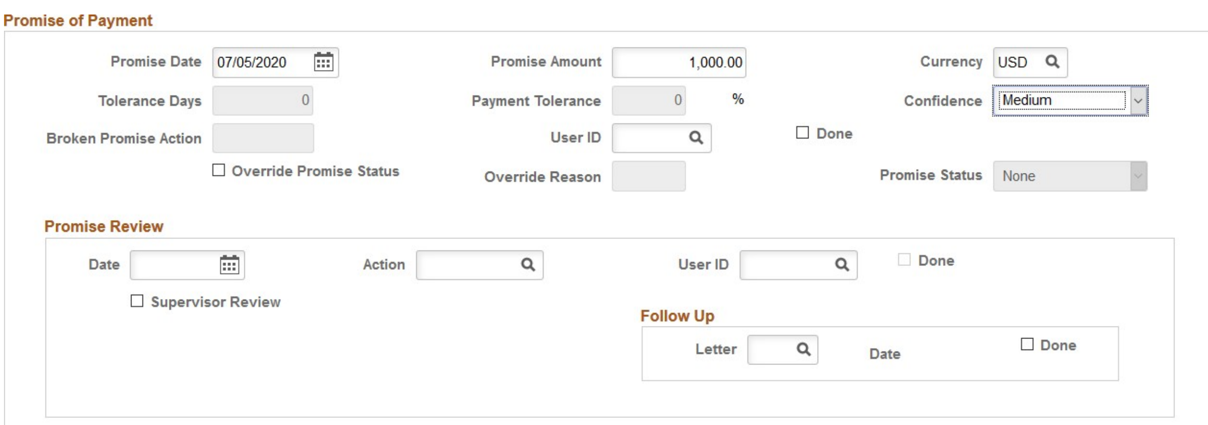
The next section has several parts. We will only concern ourselves with the Promise of Payment.



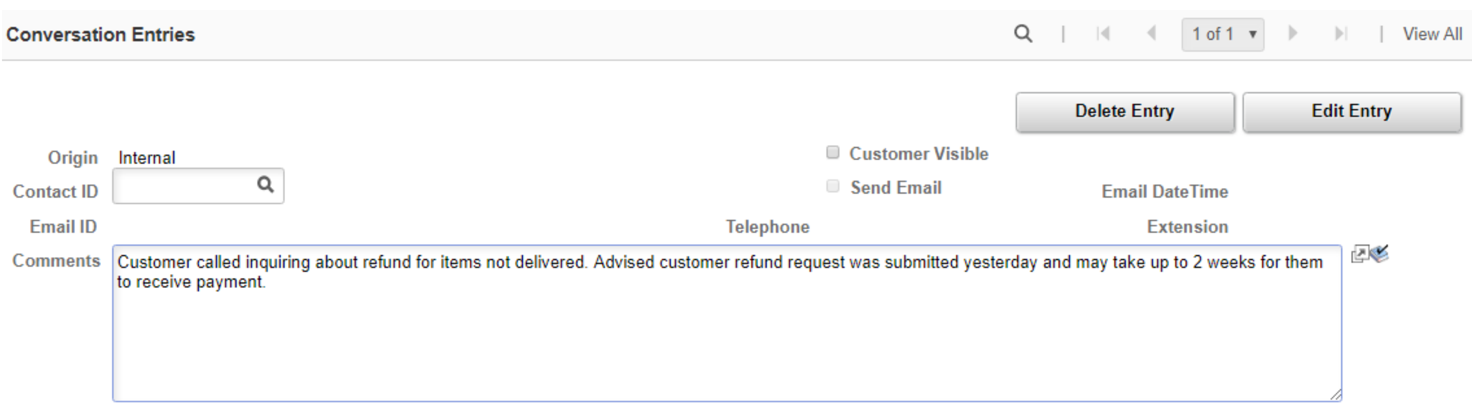
Only select Promise of Payment If a customer has promised to make a payment. When Promise of Payment is selected the section changes. Enter the information in the appropriate fields to reflect the various information the customer provides to you about the promise to pay. Also remember to select a confidence 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.



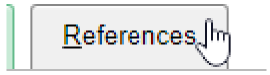
If a department wishes to use the Promise Review feature they may. This is not a necessary component to enter a promise to pay. However, if the department wishes to utilize the Promise Review section they should contact billingarhelp@usf.edu to help understand how this is used and what security roles 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.



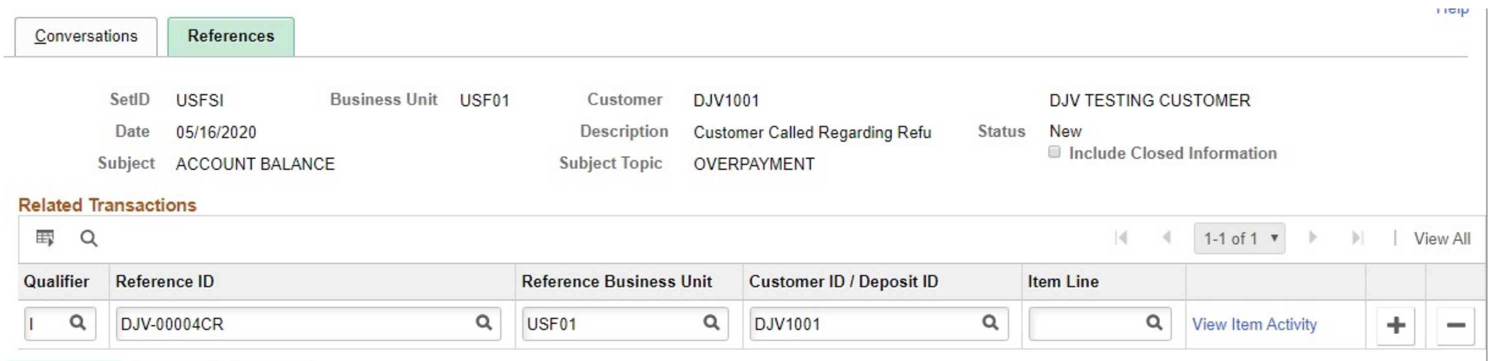
The next section is where the conversation is to be entered. Never select the Customer Visible Option. Enter as much as possible regarding the conversation held with the customer.



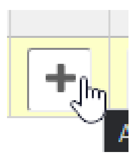
Next select the References tab.

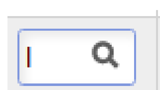


The item you used to navigate to the conversation screen should already be referenced.



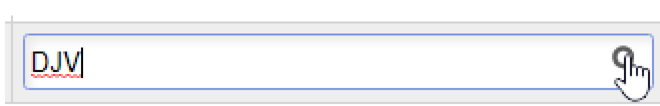
Should you want to reference an additional customer Item with this conversation, check the Include Closed Information Check box, click the Plus sign to the right, enter I in the Qualifier field, then tab out of the field.



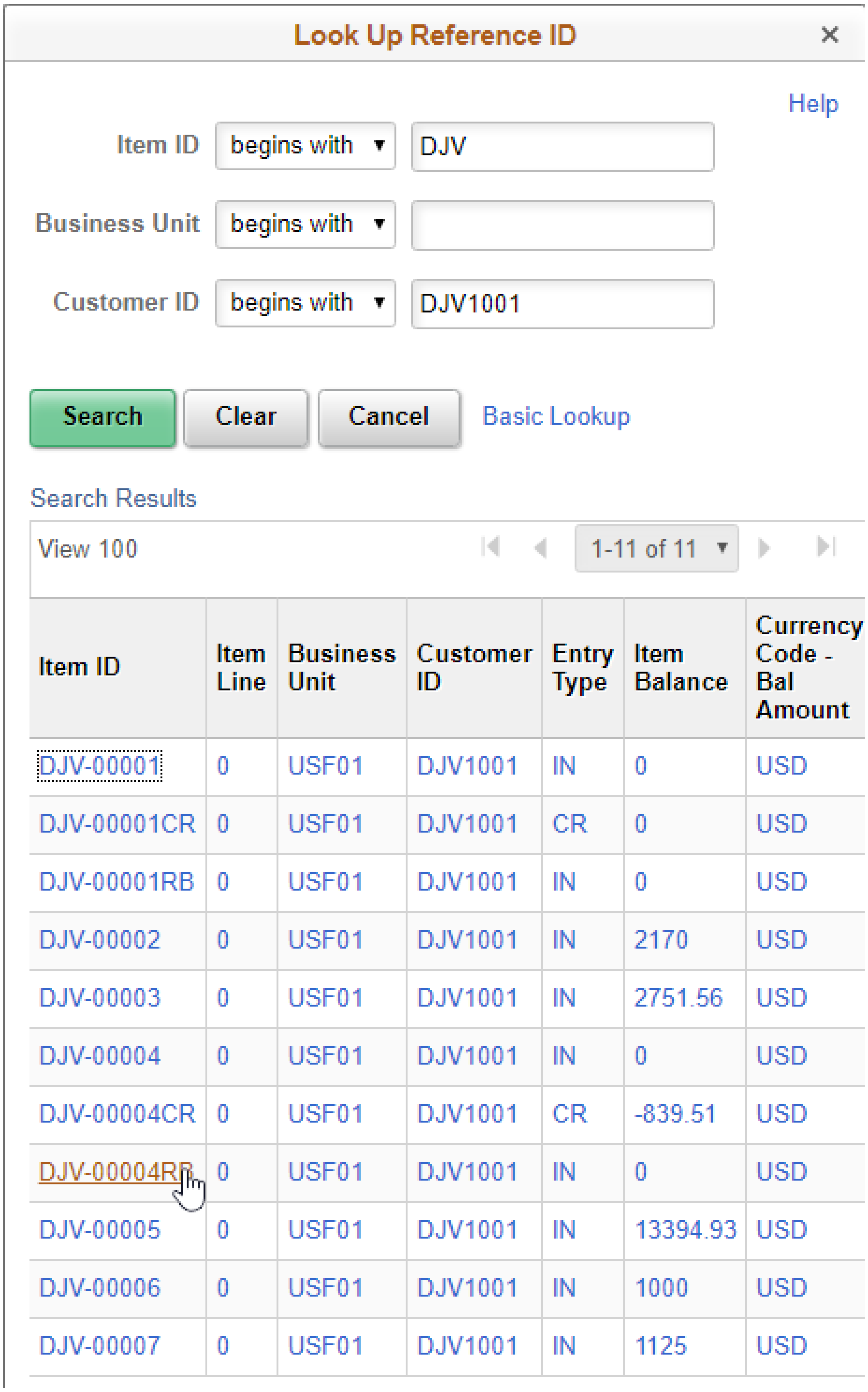


When you tab out of the field, more fields should open on the screen.

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.

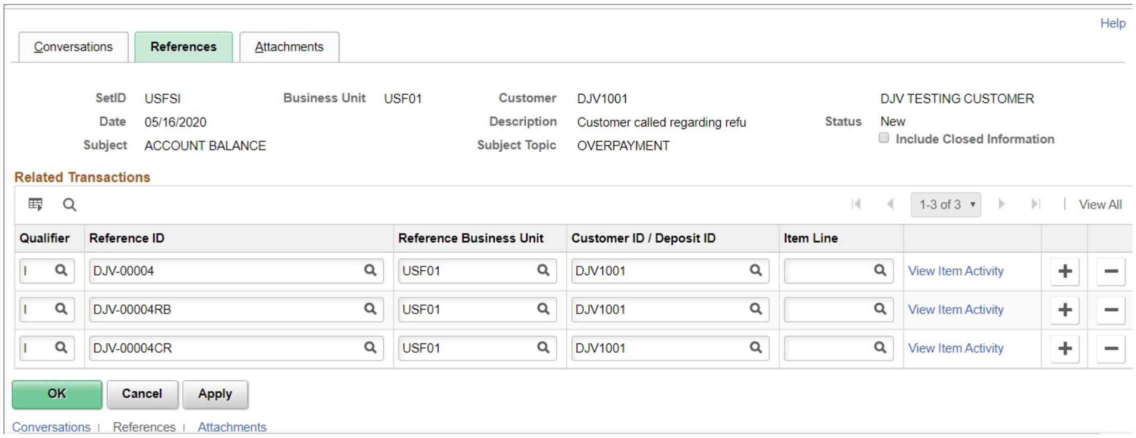


On the look up screen enter the Customer ID you are adding the conversation to. Then click Search. Once your listing has narrowed down, locate the other item. If need be you can also enter the exact Item ID in the Item ID look up field to only retrieve that item.

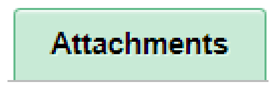


Item ID	Item Line	Business Unit	Customer ID	Entry Type	Item Balance	Currency Code - Bal Amount
DJV-00001	0	USF01	DJV1001	IN	0	USD
DJV-00001CR	0	USF01	DJV1001	CR	0	USD
DJV-00001RB	0	USF01	DJV1001	IN	0	USD
DJV-00002	0	USF01	DJV1001	IN	2170	USD
DJV-00003	0	USF01	DJV1001	IN	2751.56	USD
DJV-00004	0	USF01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

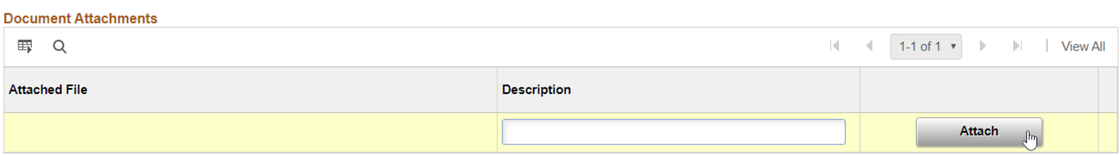
Repeat these steps until all items you wish to select are included.

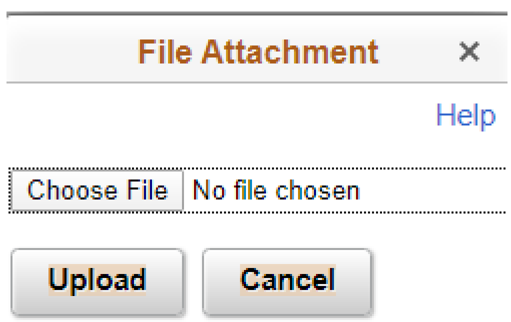


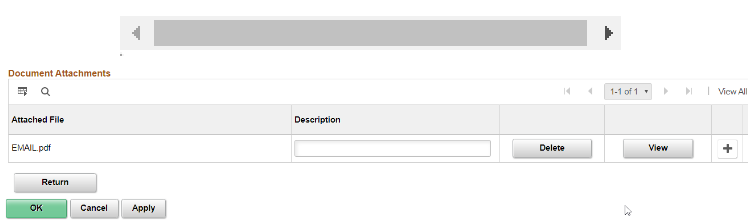
If you have attachments, click on the Attachments tab.



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.

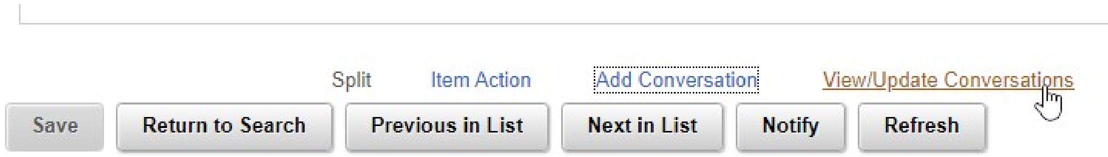






Click the Plus sign to the right to add additional documents and repeat the steps to attach the document.

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.

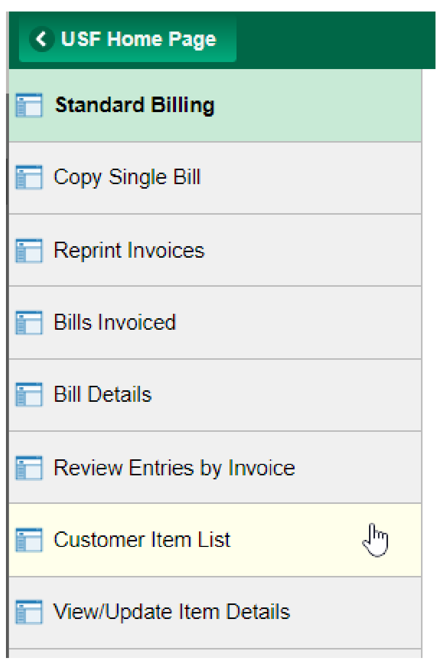


Should you need to add another conversation to the same item, for example a second phone call with the customer, you may click the Add Conversation link and add another conversation.

2. Customer Item List Conversation Entry

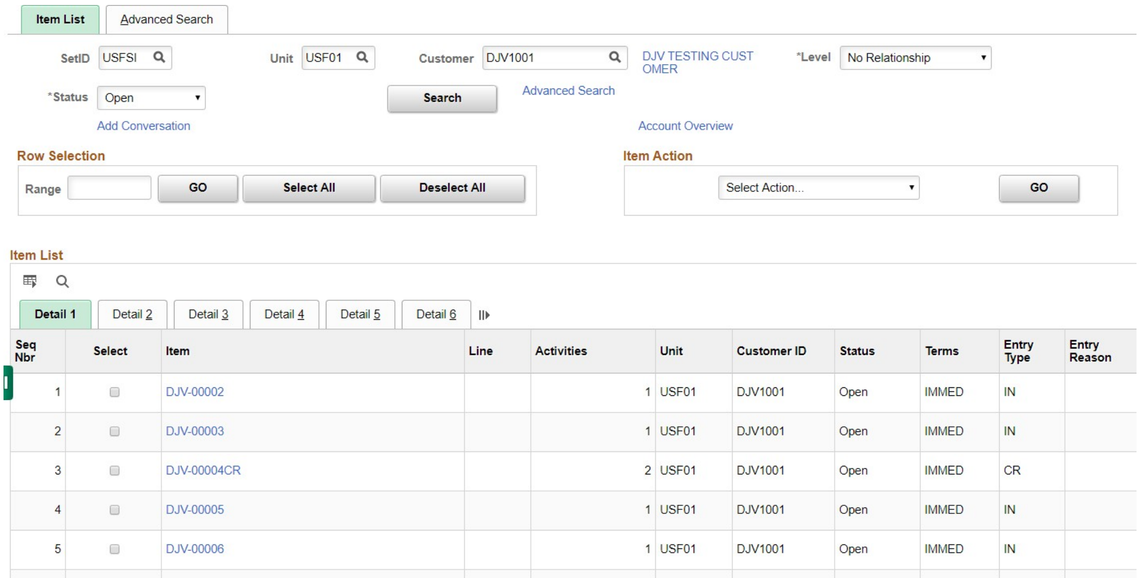
Just like the View/Update Item Details page you can add conversations directly from items in the Customer Item List screen. The pages used to enter the conversation are identical to the ones in the View/Update Item Details pages. Word of advice, when using this method do not use your escape button as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

Click on the Customer Item List.

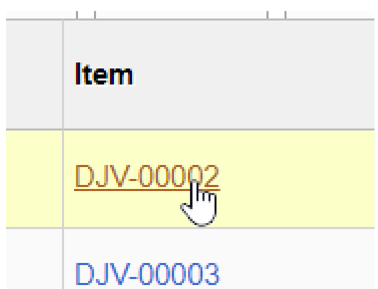


Enter the Business Unit and Customer ID for the Customer Account you wish to review and click Search.

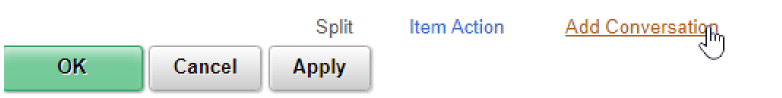
You will be presented with a listing of Open Customer Items.



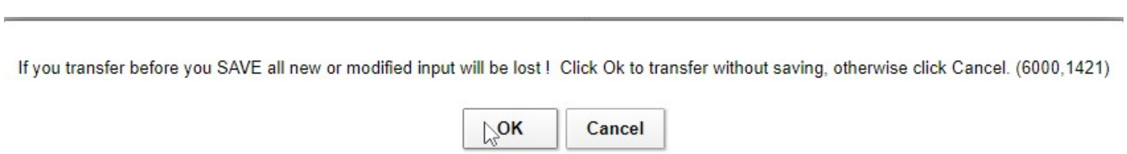
In the listing, select the item you wish to add a conversation to.



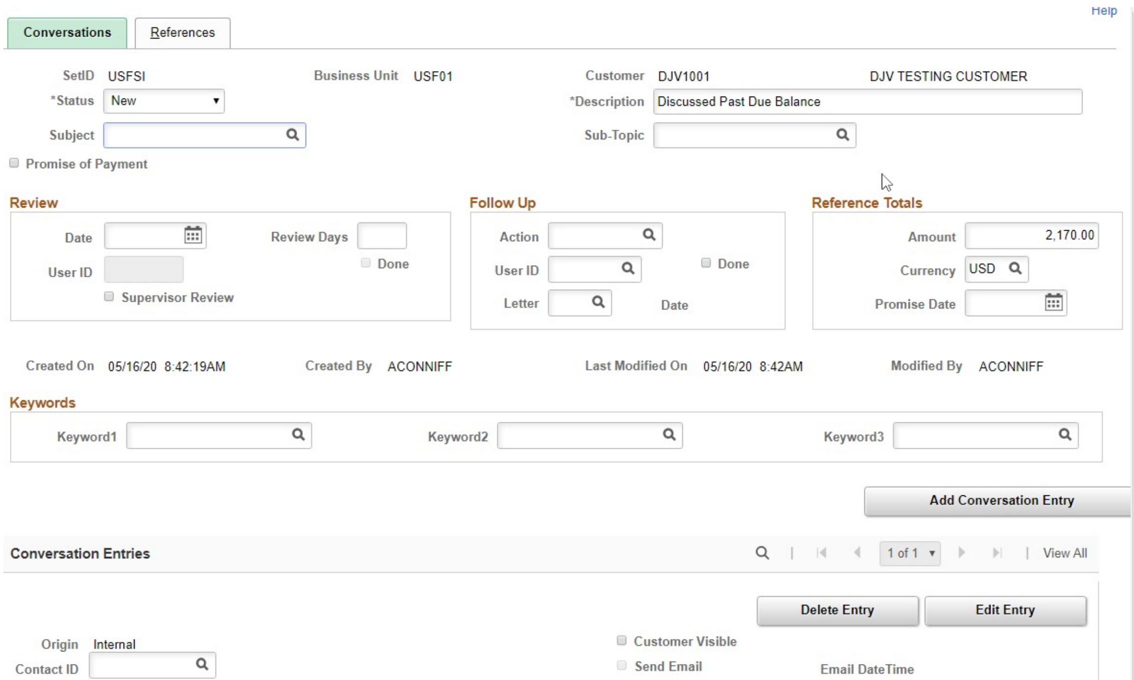
On the pop-up screen select Add Conversation.



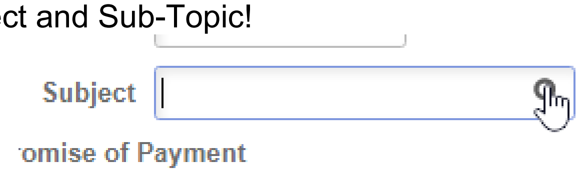
Click OK on the pop-up message.

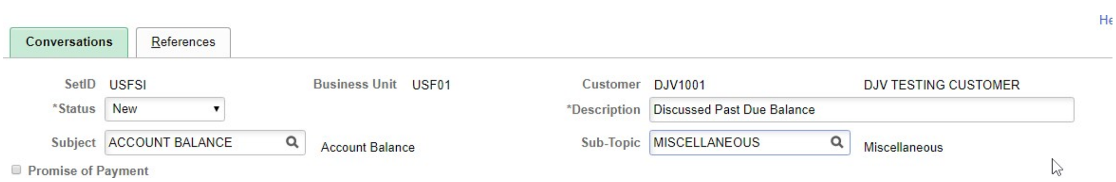


Start entering the information as you would with the other methods.

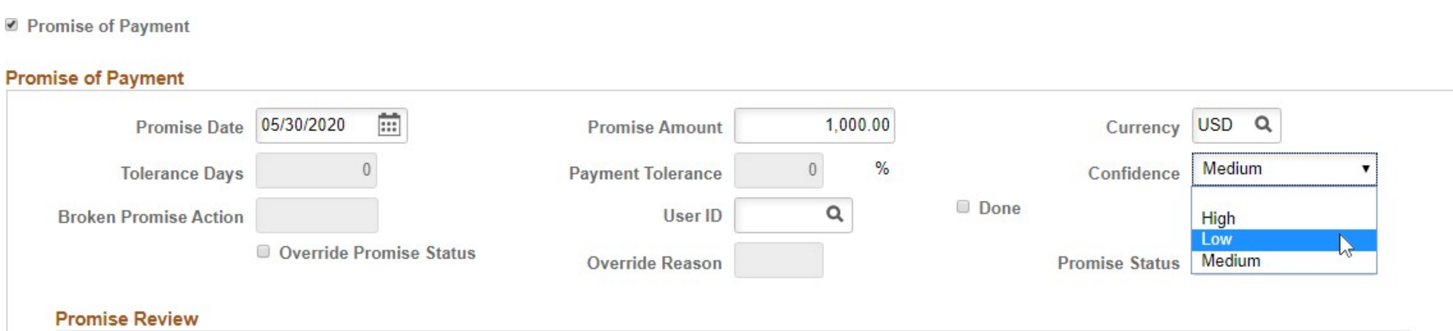


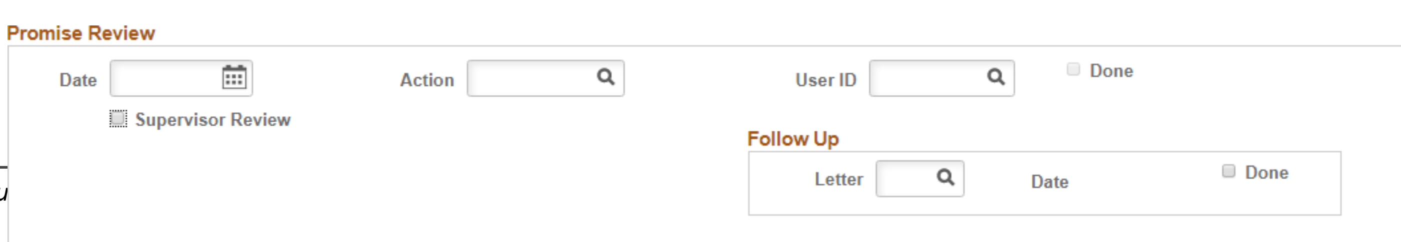
Don't forget to select a Subject and Sub-Topic!



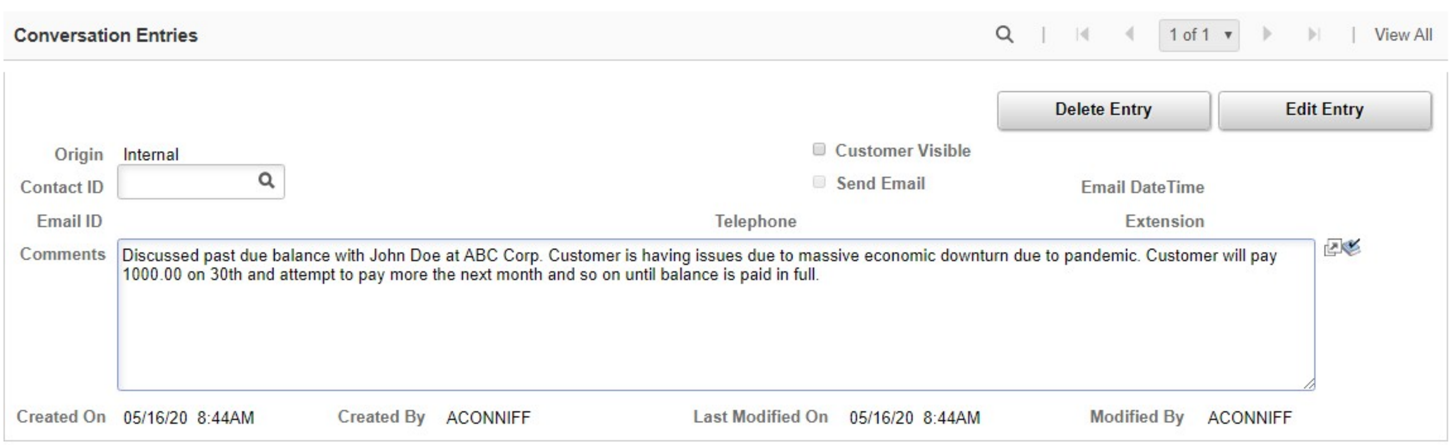


Remember to fill out the Promise of Payment information if you select the Promise of Payment check box and select a confidence level.

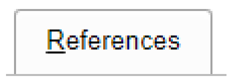


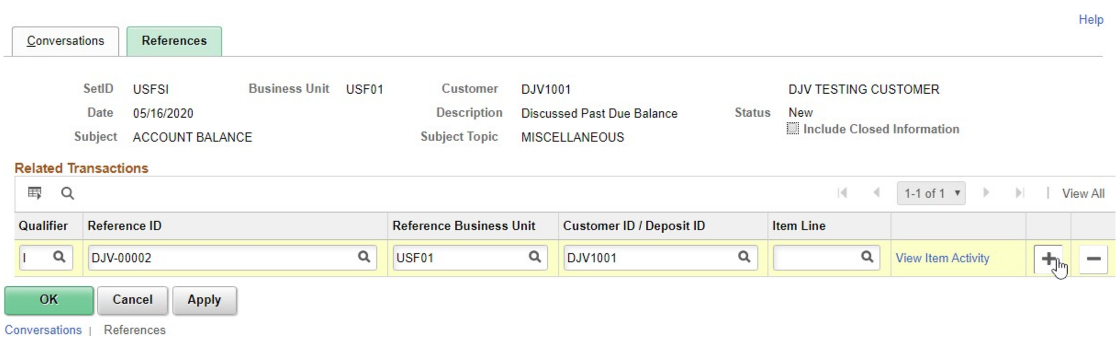


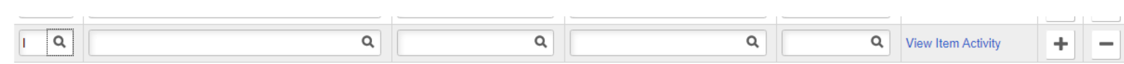
Add in the conversation information.

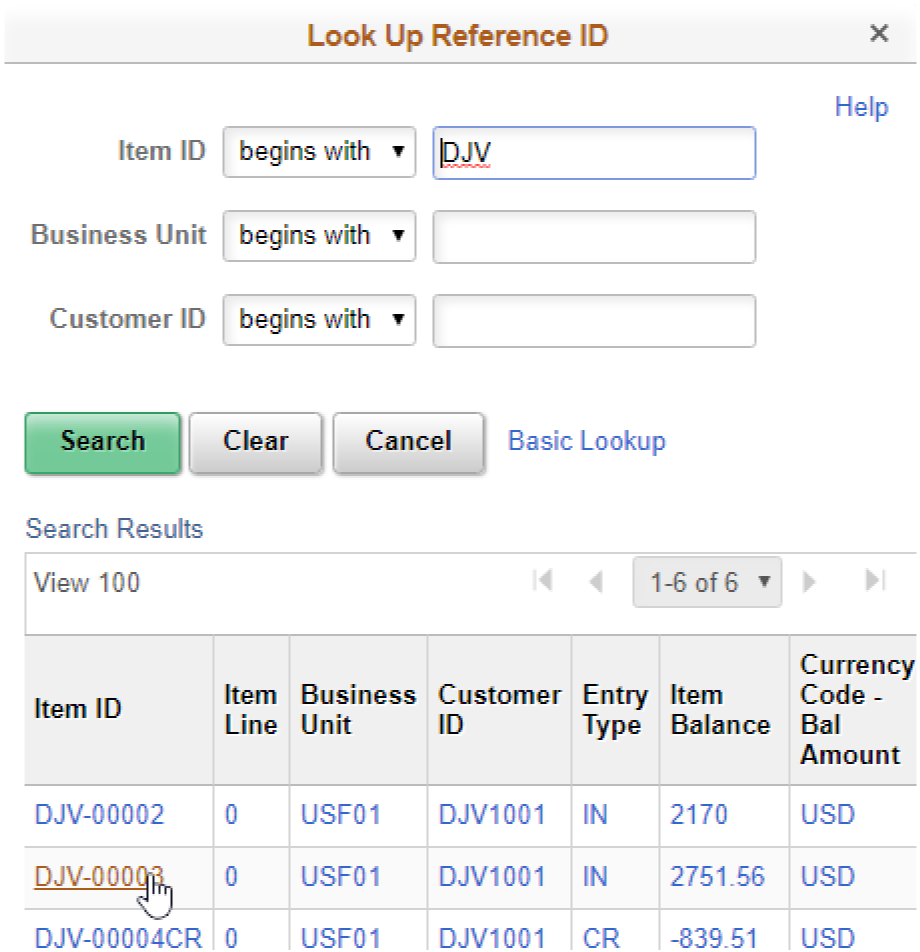


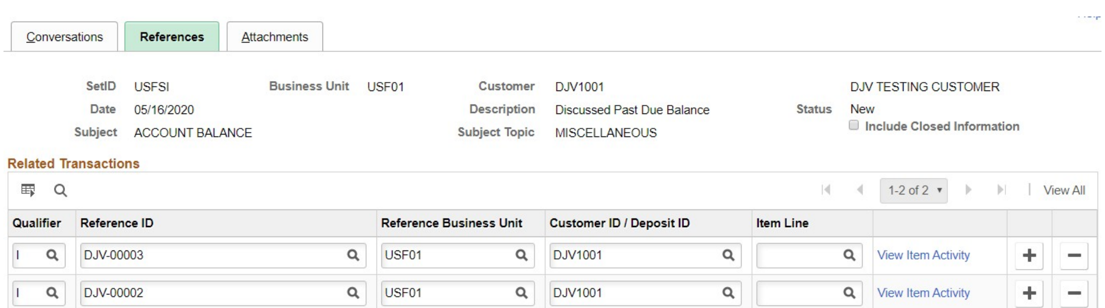
Next review the references and add any additional ones if you need to.



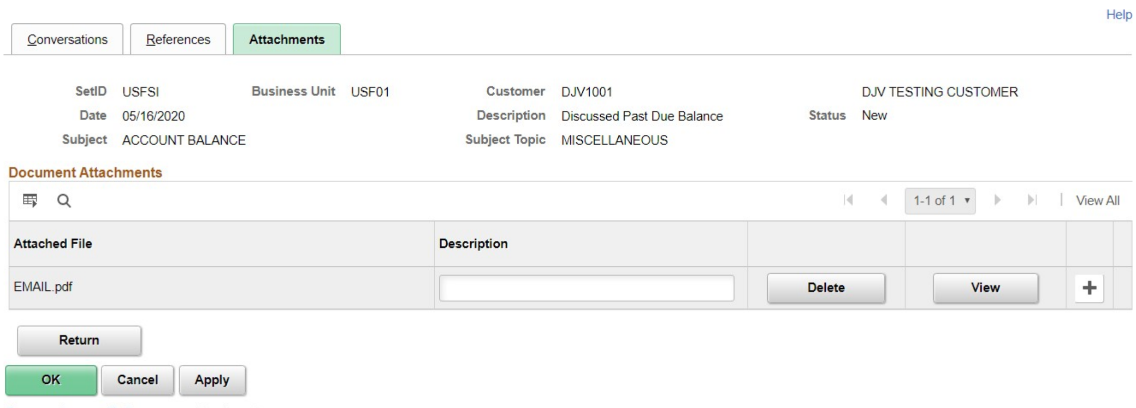




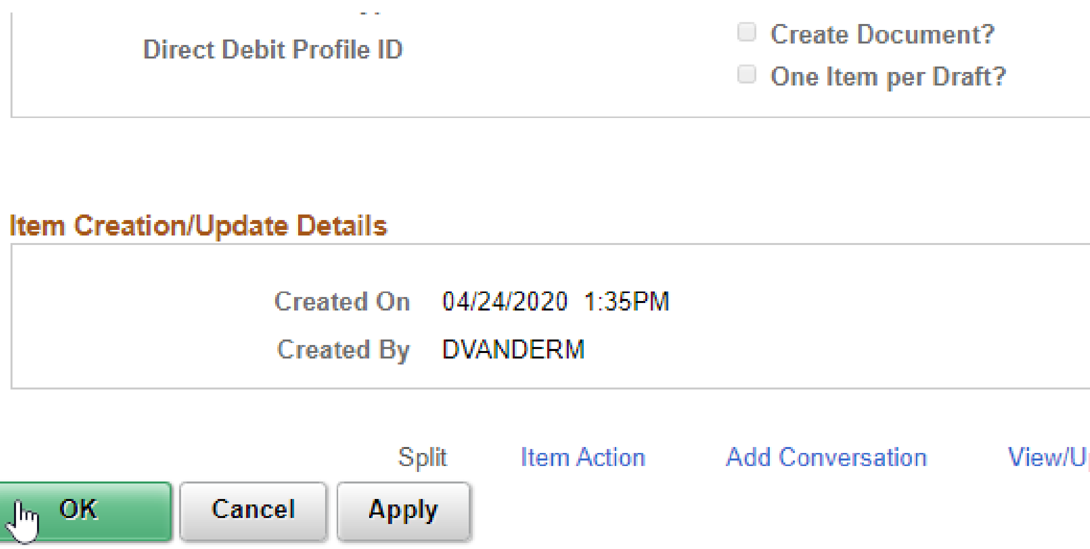




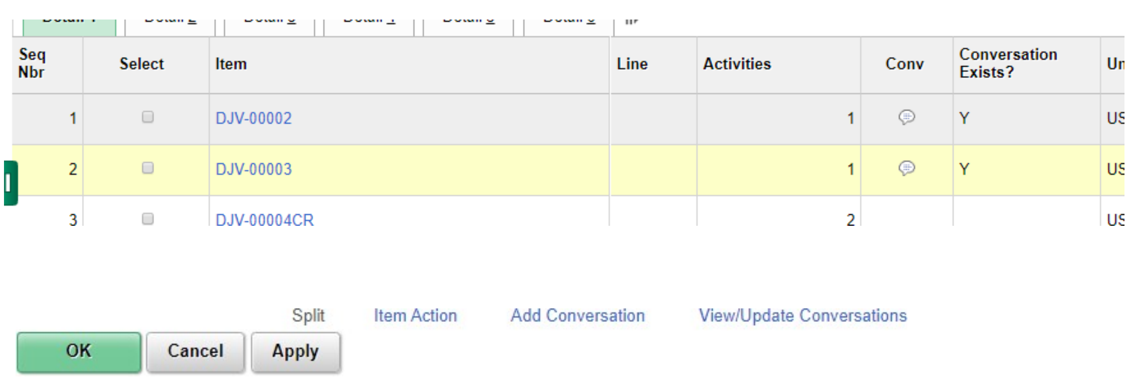
Finally click on the Attachments tab and add any necessary attachments. Once finished click OK.



Then click OK on the next screen.



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.



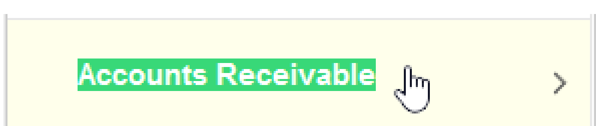
3. Navigator Conversation Entry/Customer Conversation Reviews

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.

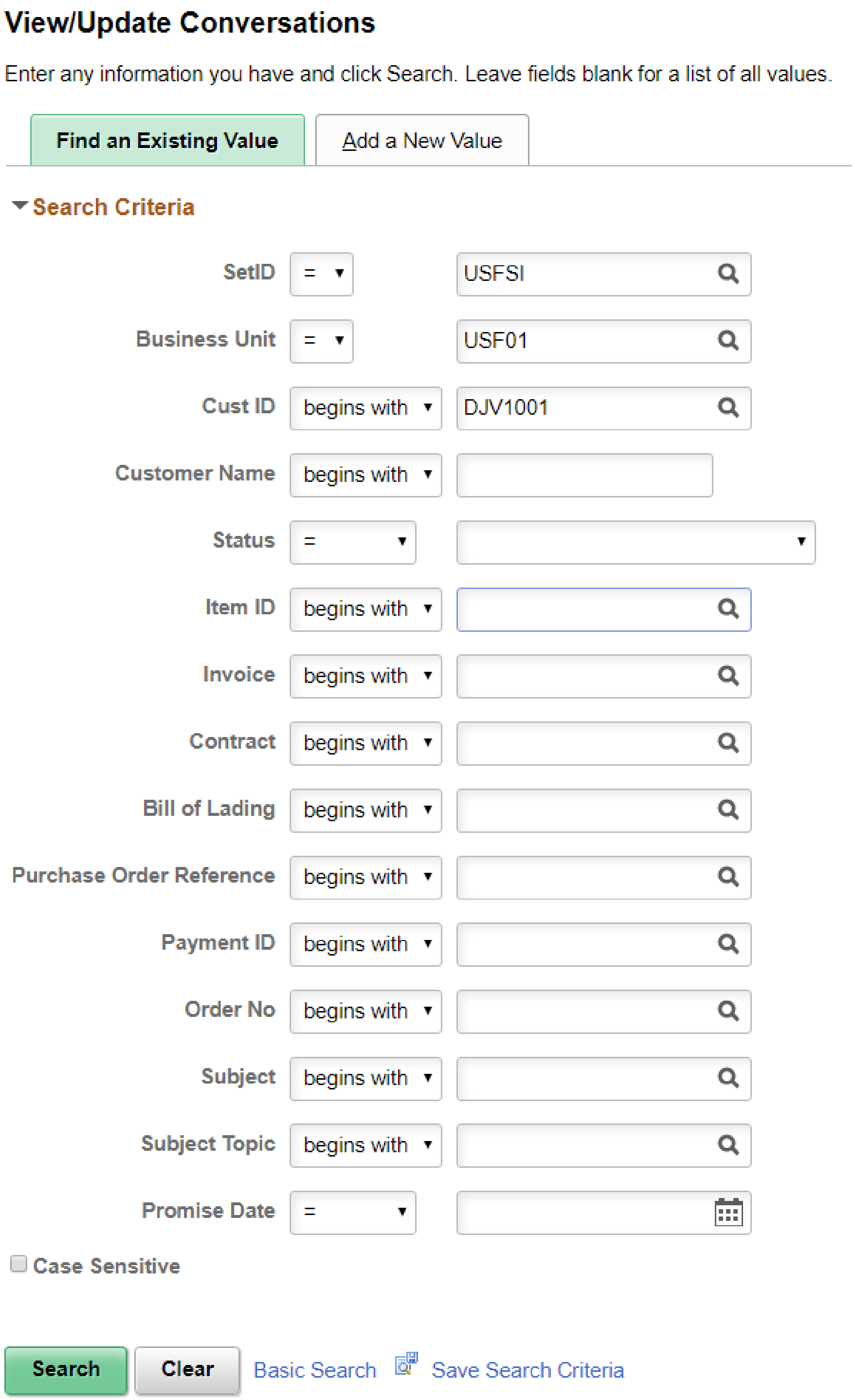
Then in Navigator Pres s Ctrl+f. Depending on the browser will depend on where the search field appears. Enter Accounts Receivable in the box and then enter. It should take you the Accounts Receivable option.

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



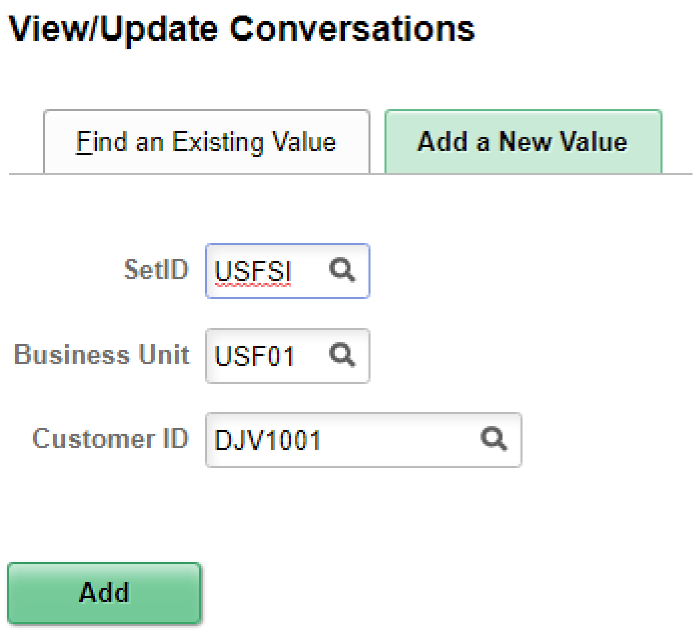
Once you click View/Update Conversations you should be presented with a page which has two tabs. Find an Existing Value and Add a New Value.

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.



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
USF01	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.



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]