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 <u>billingarhelp@usf.edu</u> 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.



	✓ USF Home Page	
PCard Reconciler	Billing and AR	Asset Management
18 Reconciler Unreconciled	\$ the second s	
Project Costing	PCard	Accounts Payable
- \$	Bank Name	I

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.

C USF Home Page	
📄 Standard Billing	
Copy Single Bill	
Reprint Invoices	
Bills Invoiced	
📄 Bill Details	
Review Entries by Invoice	
E Customer Item List	
Tiew/Update Item Details	Ţ

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 Ex	cisting Value									
- Search Crite	eria									
Bu	siness Unit	= •	USF01		Q					
C	ustomer ID	begins with •			Q					
	Item ID	begins with •	DJV-00004	1						
	Item Line	- •								
	Item Status	- •			T					
Cre	edit Analyst	begins with •			Q					
	Collector	begins with •			Q					
Purchase Orde	r Reference	begins with v			Q					
D	ocument ID	begins with •								
Bi	II of Lading	begins with v								
	Contract	begins with 🔻			Q					
Case Sensitive	ve Clear Basi	ic Search 🖉 Sa	ave Search	Criteria						
View All								14.4	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	Contra
USF01	DJV1001	DJV-00004	0	Closed	DVANDERM	DVANDERM	(blank)	(blank)	(blank)	(blank)
USF01	DJV1001	DJV-00004Cfm	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 Convernation	on	
Save	Return to Search	Prev	vious in List	Next in List	Notify	Refresh

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)	
OK S Cancel	

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.

Conversation	ns <u>R</u> eferences				
SetID	USFSI	Business Unit USF01	Customer	DJV1001	DJV TESTING CUSTOMER
*Status	New •		*Description	Customer Called Regarding Re	fu
Subject	ACCOUNT BALANCE	Q Account Balance	Sub-Topic	OVERPAYMENT	Q Overpayment

Look Up St	ubject ×
Cancel	Help
Search Results	
View 100	-8 of 8 🔻 🕨
Conversation Subject	Description
(blank)	(blank)
ACCOUNT BALANO	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		Follow Up	Reference Totals	
Date	Review Days	Action Q	Amount	
User ID	Done	User ID Q	Done Currency	USD Q
Supervisor Review		Letter Q Date	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

T Tollinge Da	te		Promise Amount	0.00		Currency	USD Q
Tolerance Da	ys 0		Payment Tolerance	0 %		Confidence	Medium
roken Promise Acti	on		User ID	۹	Done		
	Override Prom	ise Status	Override Reason			Promise Status	None
Date	iii	Action	Q	User ID	٩	Done	
L Supe	VISOF REVIEW			Follow Up			
				Letter	Q	Data	Done

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 Date	07/05/2020		Promise Amount	1,000.0	00	Curren	icy USD Q
Tolerance Days	0		Payment Tolerance	0	%	Confiden	ce Medium 🗸
Broken Promise Action			User ID	Q		one	
Promise Paviaw	Override Pro	omise Status	Override Reason			Promise Stat	None 🗸

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.

Conversati	on Entries		Q 4 4 1 of 1	▼ ▶ ▶ View All
			Delete Entry	Edit Entry
Origin	Internal	Customer Visible		
Contact ID	Q	Send Email	Email DateTime	
Email ID		Telephone	Extension	
Comments	Customer called inquir to receive payment.	ing about refund for items not delivered. Advised customer refund request was submitted yeste	rday and may take up to 2 wee	ks for them

Next select the References tab.



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

<u>C</u> onversat	tions	References										
	SetID	USFSI	Business Unit	USF01	Customer	DJV1	001		DJV TESTING CU	STOMER		
	Date	05/16/2020			Description	Customer Called Regarding Refu OVERPAYMENT		Status	us New			
S	ubject	ACCOUNT BALAN	NCE		Subject Topic				Include Closed	Information		
Related Tra	ansacti	ons										
III Q									I.	1-1 of 1 🔻 🕨	l I V	/iew All
Qualifier	Refere	nce ID			Reference Business	Unit	Customer ID / Deposit ID		Item Line			

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.

DJV	ମ୍ଳ
DJV	ų

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		×
Item ID	begi	ns with v	DJV			Help
Business Unit	begi	ns with 🔻				
Customer ID	begi	ns with 🔻	DJV1001			
Search Search Results View 100	Clear	Cano	el Basic	Lookur	0 1 of 11 ▼	▶ ▶1
Item ID	ltem Line	Business Unit	Customer ID	Entry Type	ltem 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-00004RR	0	USF01	DJV1001	IN	0	USD
DJV-00005	0	USF01	DJV1001	IN	13394.93	USD
DJV-00006	0	USF01	DJV1001	IN	1000	USD

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

	SetID USFSI Business Unit Date 05/16/2020 Subject ACCOUNT BALANCE	USF01 Customer Description Subject Topic	DJV1001 Customer called regarding refu OVERPAYMENT	E Status M	DJV TESTING CUSTOMER New Include Closed Informa	tion
	ransactions			I	 1-3 of 3 • 	View
Qualifier	Reference ID	Reference Business Unit	Customer ID / Deposit ID	Item Line		
I Q	DJV-00004 Q	USF01 Q	DJV1001 Q	٩	View Item Activity	+
	DJV-00004RB Q	USF01 Q	DJV1001 Q	٩	View Item Activity	+
i q						

If you have attachments, click on the Attachments tab.

Attachments

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.

ocument Attachments								
₽ Q				$\ \boldsymbol{\theta} \ $	• [1-1 of 1 🔻	\mathbf{b}	View All
Attached File		Description						
						A	ttach	J
	Fil	e Attachment	×					
			Help					
	Choose File	No file chosen						
	Upload	Cancel						
			۱.					
Document Attachments								
III) Q			i∉	f1 + →	M	View All		
Attached File		Description	Delete	View	_			
Return						T		
OK Cancel	Apply		1	2				

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.

		Split	Item Action	Add Conversa	tion <u>Vi</u>	ew/Update Conv	ersations
Save	Return to Search	Pre	evious in List	Next in List	Notify	Refresh	0

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.

Add Conversation	on
Next in List	Notify

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.

Act Conversation Account Overview Rem Select All Item Action Range GO Select All Select Action GO Total 2 Optail 4 Detail 5 Item Activities Select Action GO Select Action GO Select Action GO Total 2 Detail 4 Detail 5 Item Activities Unit Sustemer ID Status Furty Figure Select Item Activities Unit Outstoomer ID Status Furty Figure Figure Figure Figure Figure Figure Figure GO Select Item Activities Unit Outstoomer ID Status Figure Figure Figure Select Item <th>Se *Stat</th> <th>tus Open</th> <th>Unit USF01 Q</th> <th>Customer DJV10</th> <th>01 Q D. Ol</th> <th>JV TESTING MER</th> <th>G CUST *Lev</th> <th>el No Relatio</th> <th>nship 🔹</th> <th>·</th> <th></th>	Se *Stat	tus Open	Unit USF01 Q	Customer DJV10	01 Q D. Ol	JV TESTING MER	G CUST *Lev	el No Relatio	nship 🔹	·	
tem Action Select All Deselect All Select Action Select Action Select Action Select Action Select Action Select Action Select Action Select Action Select Action Select Action Select Action Select Action Select Mem Detail 5 Detail 6 Image Select Action Select Actio		Add Conver	sation		Ac	count Overv	view				
Range GO Select All Desslet All Desslet All Select All <t< th=""><th>Row Sele</th><th>ction</th><th></th><th></th><th>Item</th><th>Action</th><th></th><th></th><th></th><th></th><th></th></t<>	Row Sele	ction			Item	Action					
Select Item Octail 1 Detail 2 Detail 4 Detail 5 Detail 5 III 3 0 0UV-00002 Image: Select Image: Select <th>Range</th> <th></th> <th>GO Select All</th> <th>Deselect All</th> <th>1</th> <th></th> <th>Select Action</th> <th></th> <th>•</th> <th>GO</th> <th></th>	Range		GO Select All	Deselect All	1		Select Action		•	GO	
1DV-0002IMMEDIM			Detail 3 Detail 4 Detail 5 F	Detail 6							
2DJV-0003Image: Model and Marcine and Marcin	Seq Ibr	Select	Detail 3 Detail 4 Detail 5 [Detail <u>6</u> II▶ Line	Activities	Unit	Customer ID	Status	Terms	Entry Type	Entry Reason
3 DJV-00004CR CR USF01 DJV1001 Open IMMED CR 4 0.0005 0.00	Seq Ibr 1	Select	Detail 3 Detail 4 Detail 5 0 Item DJV-00002	Detail <u>6</u> II▶ Line	Activities	Unit USF01	Customer ID DJV1001	Status Open	Terms IMMED	Entry Type IN	Entry Reason
4 DJV-00005 DJV	Seq Ibr 1	Select	Detail 3 Detail 4 Detail 5 0 Item DJV-00002 DJV-00003 DIV-00003 DIV-00003	Detail <u>6</u> II▶ Line	Activities	Unit USF01 USF01	Customer ID DJV1001 DJV1001	Status Open Open	Terms IMMED IMMED	Entry Type IN IN	Entry Reason
5 DJV-0006 DJV-0006 1 USF01 DJV1001 Open IMMED IN	1 2 3	Select	Detail 3 Detail 4 Detail 5 C Item DJV-00002 U U DJV-00003 U U U DJV-00004CR U U U	Detail <u>6</u> > Line	Activities 1 1 2	Unit USF01 USF01 USF01	Customer ID DJV1001 DJV1001 DJV1001 DJV1001	Status Open Open Open Open	Terms IMMED IMMED IMMED	Entry Type IN IN CR	Entry Reason
	Seq Ibr 1 2 3 4	Select	Detail 3 Detail 4 Detail 5 C tem DJV-00002	Detail 6 II>	Activities	Unit USF01 USF01 USF01 USF01	Customer ID DJV1001 DJV1001 DJV1001 DJV1001 DJV1001	Status Open Open Open Open	Terms IMMED IMMED IMMED IMMED	Entry Type IN IN CR IN	Entry Reason

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

Itom
item
DJV-00002
DJV-00003

On the pop-up screen select Add Conversation.

		Split	Item Action	Add Conversation
ок	Cancel	Apply		Q

Click OK on the pop-up message.

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

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

	SetID U	JSFSI	Business Unit USF01	Customer	DJV1001	DJV TESTING CUSTOMER	
	*Status	New •		*Description	Discussed Past Due Balan	ice	
	Subject	8	۹	Sub-Topic		۹	
	Promise of Pay	yment				2	
F	Review			Follow Up		Reference Totals	
	Date		Review Days	Action	2	Amount 2,11	70.00
	User ID		Done Done	User ID Q	Done 🔲	Currency USD Q	
		Supervisor Review		Letter Q	Date	Promise Date	
	Created On 0	15/16/20 8:42:19AM	Created By ACONNIFF	Last Modif	ied On 05/16/20 8:42AM	Modified By ACONNIFF	
٢	Keywords						
	Keyword1	1	Q. Keyv	vord2	Q	Keyword3 C	2
						Add Conversation Entr	rv
					~ 1		w All
	Origin Inte	rnal Q		■ Cu ■ Se	Istomer Visible nd Email	Delete Entry Edit Entry Email DateTime	w All
ət to	Origin Inte Contact ID	t a Subje	ct and Sub-Top	□ cu □ se ic!	Istomer Visible nd Email	Delete Entry Edit Entry Email DateTime	w All
get to	Origin Inte Contact ID	t a Subje	ct and Sub-Top Subject	□ Cu □ Se iC!	istomer Visible nd Email	Delete Entry Edit Entry Email DateTime	w All
orget to	Origin Inte Contact ID	t a Subje	ct and Sub-Top Subject	□ Cu □ Se ic! nt	istomer Visible nd Email	Delete Entry Edit Entry Email DateTime	All
rget to	Origin Inte Contact ID O SEIEC	t a Subje	ct and Sub-Top Subject	cu se	istomer Visible nd Email	Delete Entry Edit Entry Email DateTime	w All
rget to	Origin Inte Contact ID O Select	t a Subje	ct and Sub-Top Subject	© Cu © Se ic! nt	istomer Visible nd Email	Delete Entry Edit Entry Email DateTime DJy TESTING CUSTOMER	
get to	Origin Inte Contact ID O SELECT	t a Subject	ct and Sub-Top Subject	© Cu © Se ic! nt	Istomer Visible nd Email	Delete Entry Edit Entry Email DateTime DJV TESTING CUSTOMER	w All
get t	Origin Inte Contact ID O Select Conversations SetID Subject A	t a Subject Eleferences	ct and Sub-Top Subject	Cutomer "Description Sub-Topic	DJV1001 Discussed Past Due Balance	Delete Entry Edit Entry Email DateTime DJV TESTING CUSTOMER re Miscellaneous	

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

Promise Date	05/30/2020		Promise Amount	1,00	00.00		Currency	USD Q
Tolerance Days	0		Payment Tolerance	0	%		Confidence	Medium 🔻
Broken Promise Action			User ID	Q		Done Done		High
	Override Pron	nise Status	Override Reason				Promise Status	Low S
romise Review								
romise Review								
romise Review ise Review Date		Action	٩	User	D	Q	Done	

Add in the conversation information.

Conversatio	on Entries				a	t € € 1.	of 1 🔻 🕨	View Al
						Delete Entry	Edi	t Entry
Origin	Internal				Customer Visible			
Contact ID	Q			. 5	Send Email	Email DateTir	ne	
Email ID				Telephone		Extensi	on	
Comments	Discussed past due bala 1000.00 on 30th and atte	nce with John Doe empt to pay more th	at ABC Corp. Custom e next month and so c	er is having issues due to massi n until balance is paid in full.	ve economic downturn	due to pandemic. Custo	omer will pay	
Created On	05/16/20 8:44AM	Created By	ACONNIFF	Last Modified On	05/16/20 8:44AM	Modified By	ACONNIFF	a

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

	<u>R</u> efer	ences				
<u>Conversations</u> References					н	łelp
SetID USFSI Business Unit U Date 05/16/2020 Subject ACCOUNT BALANCE	JSF01 Customer DJV10 Description Discus Subject Topic MISCE	01 sed Past Due Balance Statu ELLANEOUS	DJV TESTING CU s New Include Closed	STOMER		
Related Transactions			I4 4	1-1 of 1 🔻 🕨	View	v All
Qualifier Reference ID	Reference Business Unit	Customer ID / Deposit ID	Item Line			
I Q DJV-00002	Q USF01 Q	DJV1001 Q	٩	View Item Activity	+ 1	-
	l	Q				
	٩ ٩	Q	Q	View Item Activity	+	-
DJV		<u>`</u>	1			

			Look Up	Reference	ID		×	
	Item ID	Help						
	Business Unit	begi						
	Customer ID	begi	ns with 🔻					
	Search Results	Clear	Canc	Basic	: Lookuj	p		
	View 100			I€	•	1-6 of 6 🔻		
	Item ID	ltem Line	Business Unit	Customer ID	Entry Type	ltem Balance	Currency Code - Bal Amount	
	DJV-00002	0	LISE01	D IV1001	IN	2170		
	201 00002	· ·	00101	0311001		2170	USD	
	DJV-0000	0	USF01	DJV1001	IN	2751.56	USD	
	DJV-00008	0	USF01 USF01	DJV1001 DJV1001	IN CR	2751.56 -839.51	USD USD	
onversations	DJV-0000R DJV-00004CR	0	USF01 USF01	DJV1001	IN CR	2751.56 -839.51	USD USD USD	
onversations SetID Date Subject ed Transacti	DJV-0000 DJV-00004CR	0 0 ss Unit US	USF01 USF01 F01 Custom Descriptic Subject Top	DJV1001 DJV1001 DJV1001 on Discussed Past Due ie MISCELLANEOUS	IN CR Balance	2751.56 -839.51	USD USD USD TESTING CUSTOMER	
SetID SetID Subject ed Transacti Q	DJV-0000 DJV-00004CR	0 0 ss Unit US	USF01 USF01 F01 Custom Descriptic Subject Top	DJV1001 DJV1001 DJV1001 Discussed Past Due ice MISCELLANEOUS	IN CR Balance	2751.56 -839.51 Status DJV New In	USD USD USD TESTING CUSTOMER Include Closed Information	Jiew A
onversations SetiD Date Subject ted Transacti Q Uiffer Refer	DJV-00004CR DJV-00004CR USFSI Busine 0 USFSI Busine 0 05/16/2020 t ACCOUNT BALANCE ions	0 0 ss Unit US	USF01 USF01 F01 Custom Descriptic Subject Top	DJV1001 DJV1001 DJV1001 Discussed Past Due MISCELLANEOUS Customer ID / Depos DIV1001	IN CR Balance	2751.56 -839.51 Status DJV New In Item Line	USD USD USD TESTING CUSTOMER Include Closed Information	

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

Con	versations	References	Attachments							Help
		_								
	SetID	USFSI	Business Unit	USF01	Customer	DJV1001	[DJV TESTING CUST	OMER	
	Date	05/16/2020			Description	Discussed Past Due Balance	Status	New		
	Subject	ACCOUNT BALANC	CE		Subject Topic	MISCELLANEOUS				
Docun	nent Attac	hments								
5	Q						14	I-1 of 1 ▼	$ \mathbf{b} = \mathbf{b} = 1$	View All
Attach	ned File				Description					
EMAIL	pdf						Delete	Vi	ew	+
0	Return	Cancel Apply								

Then click OK on the next screen.

Direct Debit Profile ID	Create Documen	nt? aft?
Item Creation/Update Details		
Created On 04/24/2020 1:35PM		
Created By DVANDERM		
Split Item Action	Add Conversation	View/Ur

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.

			5 Stati <u>-</u>				117				
	Seq Nbr		Select	Item			Line	Activities	Conv	Conversation Exists?	Un
		1		DJV-00002				1	æ	Y	US
1		2		DJV-00003				1	Þ	Y	US
		3		DJV-00004CR				2			US
		ок	Cano	Split It cel Apply	em Action	Add Convers	ation	View/Update Convers	sations		

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.

Find an Existing Value	<u>A</u> dd a New	Value	
Search Criteria			
SetID	= •	USFSI	Q
Business Unit	= •	USF01	Q
Cust ID	begins with •	DJV1001	Q
Customer Name	begins with •		
Status	= •		
Item ID	begins with •		Q
Invoice	begins with •		Q
Contract	begins with •		Q
Bill of Lading	begins with •		Q
urchase Order Reference	begins with •		Q
Payment ID	begins with •		Q
Order No	begins with •		Q
Subject	begins with •		Q
Subject Topic	begins with •		Q
Promise Date	= •		

View/Undate Conversations

Customer Conversations - 16

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	Υ	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

<u>F</u> ind an Ex	isting Value	Add a N	ew Value
		1	
SetID	USFSI Q	J	
Business Unit	USF01 Q		
Customer ID	DJV1001	Q]
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]