VIEW DUNNING HISTORY

QUICK REFERENCE GUIDE

AR

The purpose of this Quick Reference Guide (QRG) is to provide a step-by-step guide on how to **view dunning history** in the North Carolina Financial System (**NCFS**).

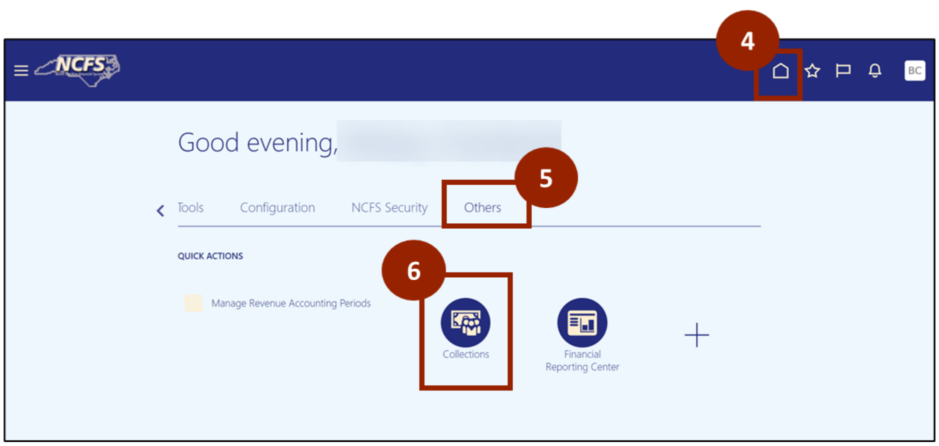
Introduction and Overview

This QRG covers the process for viewing dunning history in NCFS by navigating to the History tab on the Customer page within the Collections Manager.

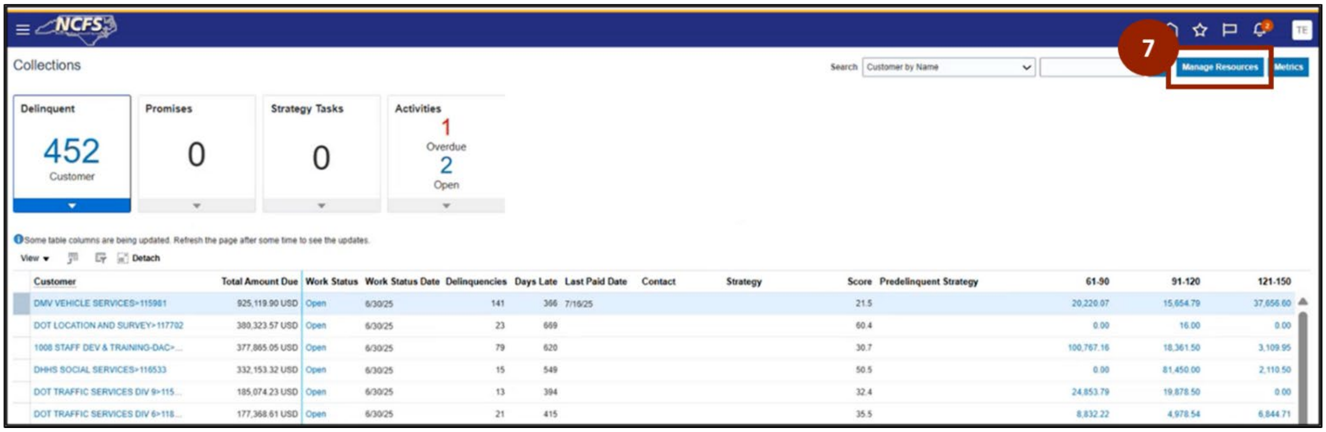
Create Customer Records

To view dunning history in NCFS, please follow the steps below:

1. Click the **Company Single Sign-On (SSO)** button.
2. Enter your **dac.nc.gov** email address.
3. Click **Next**, then enter **password**.
4. Navigate to the ***Home*** page.
5. While on the ***Home*** Screen, navigate to the **Others** tab.
6. In the **Others** tab, click on **Collections**.



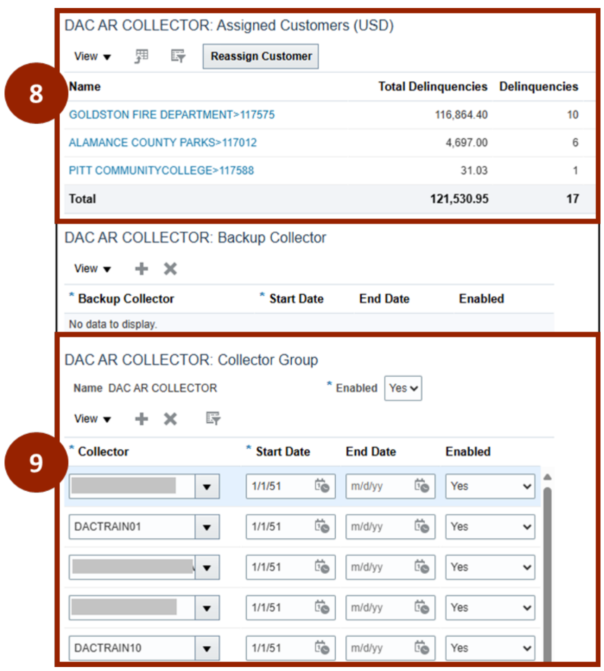
7. Click on **the Manage Resources**.



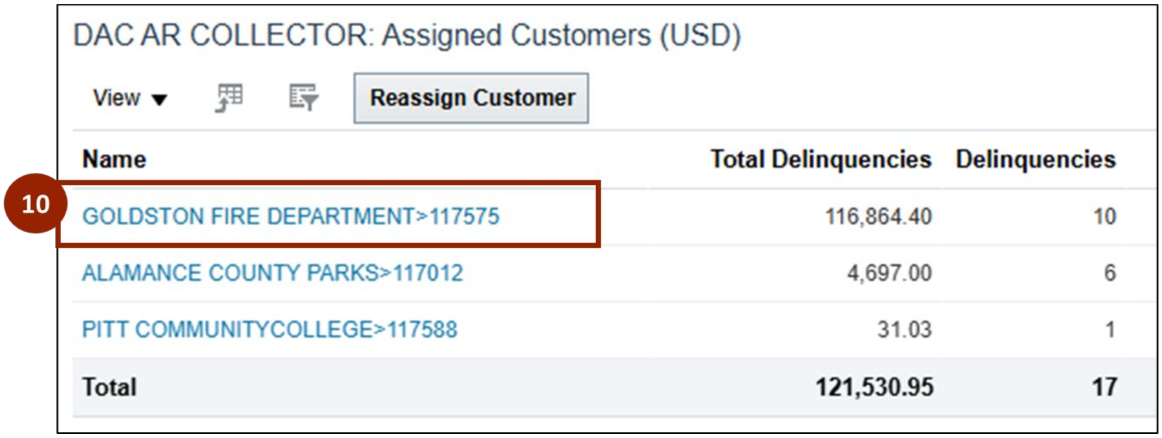
8. Customers can be found in the *Assigned Customers* section.

9. *The DAC AR Collector* section displays all collectors assigned to the group.

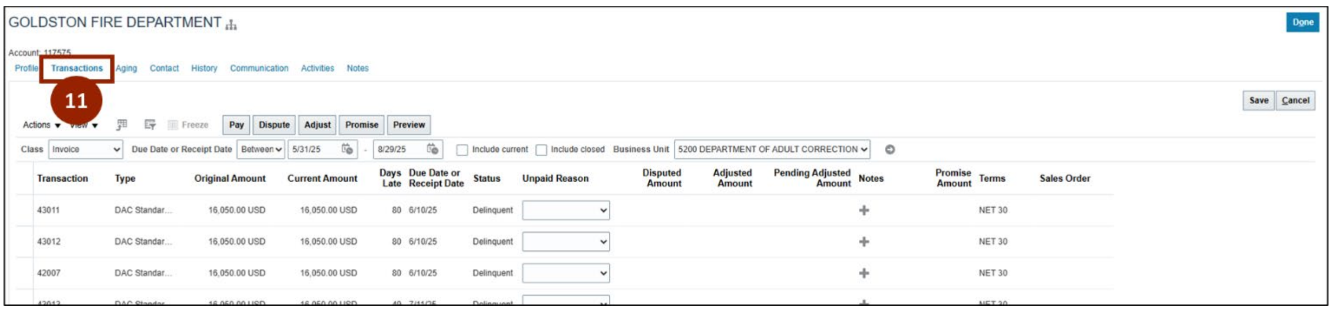
   NOTE: Once added to the collector group, the Collector has visibility for all customers.



10. To navigate to the ***Customer*** page within the *Collections Manager*, click on the **Customer Name.**

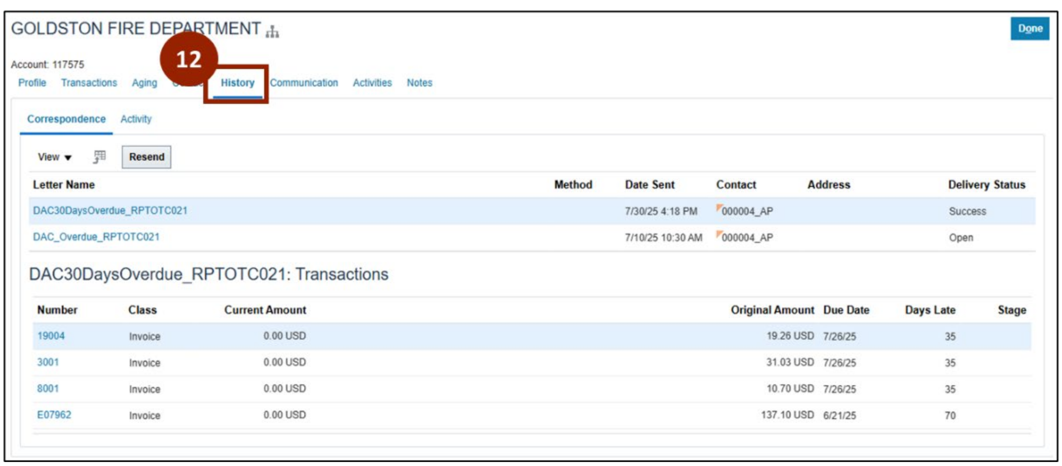


11. The ***Customer*** page will automatically open on the **Transactions** tab.



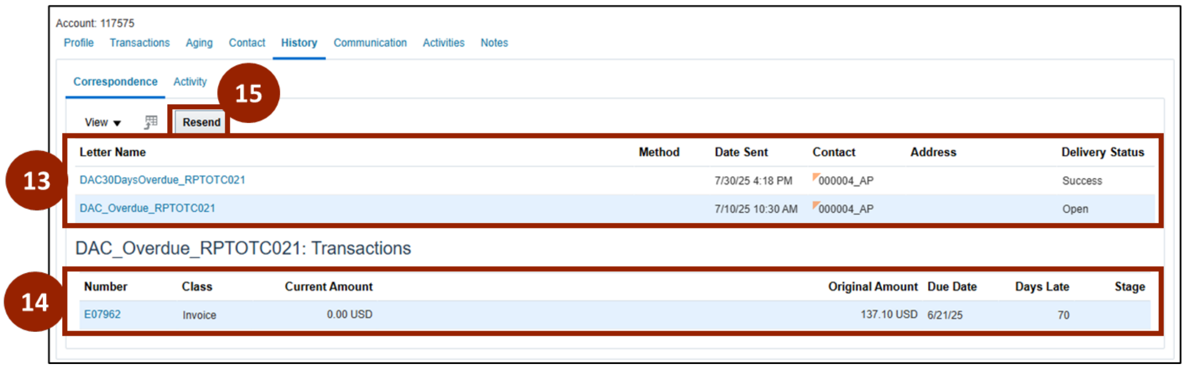
12. From the ***Customer*** page, select the **History** tab.

    NOTE: Within the **History** tab of the ***Customer*** page, Collectors can see a chronological record of all significant interactions, activities, and changes related to the customer's account.



NOTE: When accessing the **History** tab of the ***Customer*** page, the **Correspondence** tab is displayed by default.

13. On the **Correspondence** tab view all Dunning Letters sent, including *Letter Name*, *Date Sent*, *Contact*, and *Delivery Status.*
14. Select the **Letter Name** to see the **Transactions** included in that specific dunning letter.
15. Select **Resend** to send the dunning letter again.



16. On the **Activity** tab, view a full transaction history for the customer, including all receipts and adjustments created.
17. To see more than the last 30 days of transactions, adjust the date range and select the **gray arrow** to update the table.

Wrap-Up

NCFS users can view dunning history in the Collections Manager by accessing the History tab on the Customer page. This allows users to quickly review account correspondence and activity for effective collections management.

Additional Resources

Instructor Led Training (ILT)

- AR109: Manage Collections

Change Record

Effective Date 11/18/2025

- QRG creation