



VIEW DUNNING HISTORY

QUICK REFERENCE GUIDE



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**).

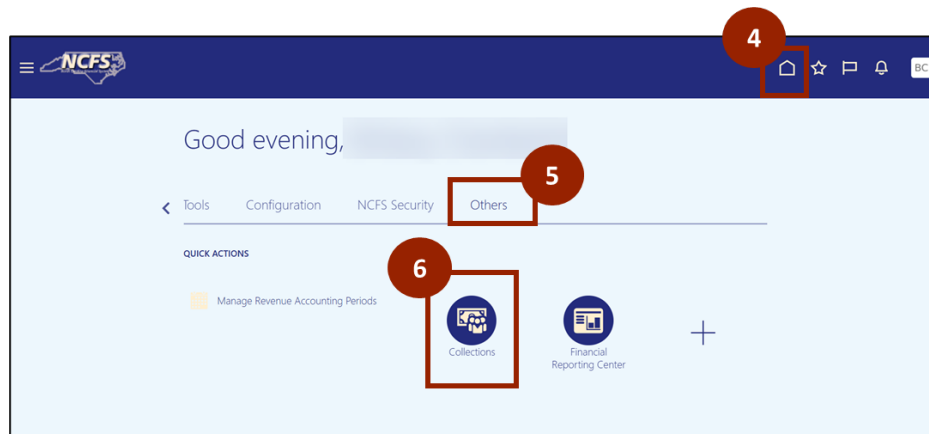
Introduction and Overview

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**.

Customer	Total Amount Due	Work Status	Work Status Date	Delinquencies	Days Late	Last Paid Date	Contact	Strategy	Score	Predelinquent Strategy	61-90	91-120	121-150
DMV VEHICLE SERVICES-115961	925,119.90 USD	Open	6/30/25	141	364	7/16/25			21.5		20,226.07	15,654.79	37,656.60
DOT LOCATION AND SURVEY-117792	380,323.57 USD	Open	6/30/25	23	669				60.4		0.00	16.00	0.00
1008 STAFF DEV & TRAINING-DAC...	377,865.05 USD	Open	6/30/25	79	620				30.7		100,767.16	18,361.50	3,109.95
DHHS SOCIAL SERVICES-116533	332,153.32 USD	Open	6/30/25	15	549				50.5		0.00	81,450.00	2,110.50
DOT TRAFFIC SERVICES DIV 9-115...	185,074.23 USD	Open	6/30/25	13	394				32.4		24,853.79	19,878.50	0.00
DOT TRAFFIC SERVICES DIV 6-115...	177,368.61 USD	Open	6/30/25	21	415				35.5		8,832.22	4,970.54	6,844.71

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.

DAC AR COLLECTOR: Assigned Customers (USD)

Name	Total Delinquencies	Delinquencies
GOLDSTON FIRE DEPARTMENT-117575	116,864.40	10
ALAMANCE COUNTY PARKS-117012	4,697.00	6
PITT COMMUNITYCOLLEGE-117588	31.03	1
Total	121,530.95	17

DAC AR COLLECTOR: Backup Collector

* Backup Collector	* Start Date	End Date	Enabled
No data to display.			

DAC AR COLLECTOR: Collector Group

Name: DAC AR COLLECTOR * Enabled: Yes

* Collector	* Start Date	End Date	Enabled
[Dropdown]	1/1/51	m/d/yy	Yes
DACTRAIN01	1/1/51	m/d/yy	Yes
[Dropdown]	1/1/51	m/d/yy	Yes
[Dropdown]	1/1/51	m/d/yy	Yes
DACTRAIN10	1/1/51	m/d/yy	Yes

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

DAC AR COLLECTOR: Assigned Customers (USD)

View [grid icon] [list icon] **Reassign Customer**

Name	Total Delinquencies	Delinquencies
GOLDSTON FIRE DEPARTMENT>117575	116,864.40	10
ALAMANCE COUNTY PARKS>117012	4,697.00	6
PITT COMMUNITYCOLLEGE>117588	31.03	1
Total	121,530.95	17

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

GOLDSTON FIRE DEPARTMENT [Done]

Account 117575

Profile **Transactions** Aging Contact History Communication Activities Notes

Actions [view icon] [grid icon] [list icon] Freeze Pay Dispute Adjust Promise Preview

Class Invoice Due Date or Receipt Date Between 5/31/25 - 9/29/25 [filter icon] [include current] [include closed] Business Unit S200 DEPARTMENT OF ADULT CORRECTION

Transaction	Type	Original Amount	Current Amount	Days Late	Due Date or Receipt Date	Status	Unpaid Reason	Disputed Amount	Adjusted Amount	Pending Adjusted Amount	Notes	Promise Amount	Terms	Sales Order
43011	DAC Standar...	16,050.00 USD	16,050.00 USD	80	6/10/25	Delinquent					+		NET 30	
43012	DAC Standar...	16,050.00 USD	16,050.00 USD	80	6/10/25	Delinquent					+		NET 30	
42007	DAC Standar...	16,050.00 USD	16,050.00 USD	80	6/10/25	Delinquent					+		NET 30	

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.

GOLDSTON FIRE DEPARTMENT [Done]

Account 117575

Profile Transactions Aging **History** Communication Activities Notes

Correspondence Activity

View [grid icon] [list icon] **Resend**

Letter Name	Method	Date Sent	Contact	Address	Delivery Status
DAC30DaysOverdue_RPTOTC021		7/30/25 4:18 PM	000004_AP		Success
DAC_Overdue_RPTOTC021		7/10/25 10:30 AM	000004_AP		Open

DAC30DaysOverdue_RPTOTC021: Transactions

Number	Class	Current Amount	Original Amount	Due Date	Days Late	Stage
19004	Invoice	0.00 USD	19.26 USD	7/26/25	35	
3001	Invoice	0.00 USD	31.03 USD	7/26/25	35	
8001	Invoice	0.00 USD	10.70 USD	7/26/25	35	
E07962	Invoice	0.00 USD	137.10 USD	6/21/25	70	

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.

Account: 117575
 Profile Transactions Aging Contact **History** Communication Activities Notes

Correspondence Activity

View 15

Letter Name	Method	Date Sent	Contact	Address	Delivery Status
DAC30DaysOverdue_RPTOTC021		7/30/25 4:18 PM	000004_AP		Success
DAC_Overdue_RPTOTC021		7/10/25 10:30 AM	000004_AP		Open

DAC_Overdue_RPTOTC021: Transactions

Number	Class	Current Amount	Original Amount	Due Date	Days Late	Stage
E07962	Invoice	0.00 USD	137.10 USD	6/21/25	70	

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