SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

QUICK REFERENCE GUIDE

November 1, 2019

Add/Update Customer Conversations

This topic covers how to add and update customer conversations.

The Conversations feature can help you keep track of ongoing discussions and conversations with customer contacts. You can create conversations that include invoice and payment issues that you are trying to resolve, as well as other customer inquiries. You can link a conversation to a specific AR Item.

You can set the conversation up for review in a specified number of days or have a supervisor review it. The system assigns the supervisor associated with the user profile for the individual to review the conversation.

Steps to complete:

- Step 1: Complete the Conversations page
- Step 2: Relate the Conversation to a Transaction (Optional)
- Step 3: Add Attachments (Optional)

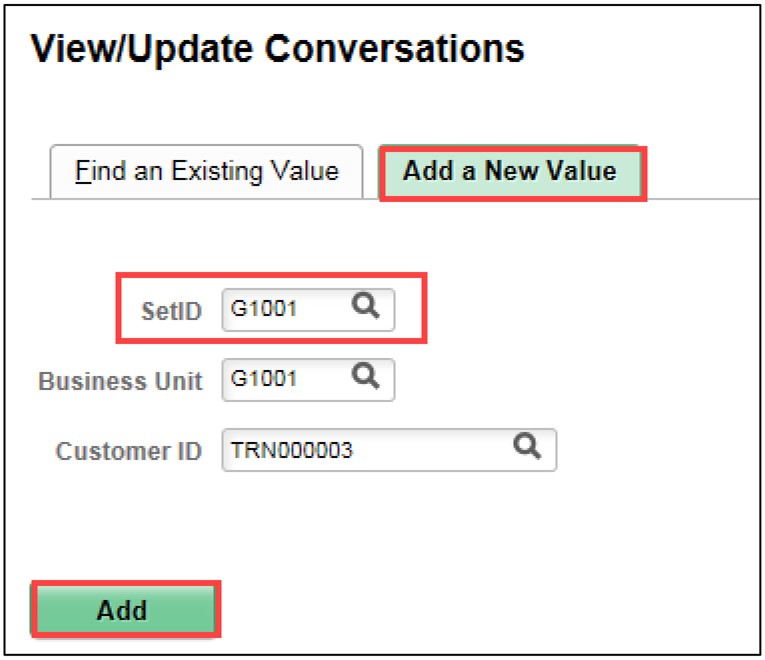
Step 1: Complete the Conversations Header

The conversation documentation you create remains on the customer's account.

1. Navigate to the *View/Update Conversations* page using one of the options below.

Navigation Options	Navigation Path
Navigation Collection	Accounting, Accounts Receivable, Customer Interactions, left-menu, Conversations, View/Update Conversations.
WorkCenter	Accounting, Accounts Receivable, Receivables WorkCenter, left-menu, Links section, Customer and Contacts, View Conversations.

2. To add a new conversation, select the **Add a New Value** tab.
    - If you're updating an existing conversation, enter search criteria on the **Find an Existing Value** tab and click on the **Search** button. Common search criteria includes *Customer ID* or *Item ID*. Make sure to update the SetID field as described below.



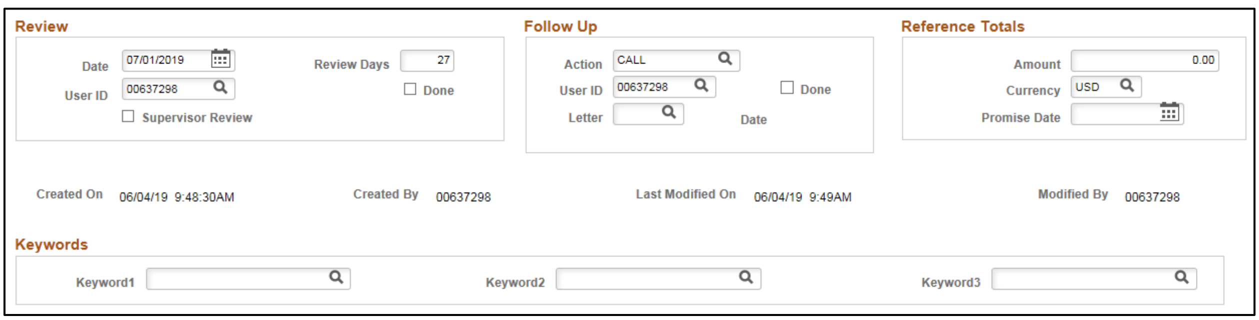
Field	Description
SetID	**DO NOT** accept the default *SetID ("SHARE")*. Enter the *SetID* field (usually the same as your *Business Unit*) or click on the **Lookup** icon and select a *SetID*. Customers are maintained at the Business Unit level. They are not shared across agencies.
Business Unit	Accept the default *Business Unit* or click on the **Lookup** icon and select a different *Business Unit*.
Customer ID	Enter the *Customer ID* or click on the **Lookup** icon to search for and select a *Customer ID*.

3. Click on the **Add** button. The *Conversations* page displays.
4. Enter the **Conversations header** information for the item as described below.

Field	Description
***Status**	The default value is "New". Use the *Status* field to assign a status to the conversation. This field is used primarily for reporting purposes. This is a required field. The other available values are: -Open: Select when you review or respond to a new conversation. -Closed: Select when you complete the dialog with the customer. This status is informational only. You can change a closed conversation.
Subject (Agency Defined)	The Subject field is used to provide a categorization of the conversation. Click on the Lookup to select a Subject. Common options include "Invoice" and "Payment".
Sub-Topic (Agency Defined)	The Sub-Topic field is used to provide a more detailed categorization of the conversation. Click the Lookup button and select a Sub-Topic. Common options include "Invoice Issue" and "Payment Issue".
***Description**	Use the Description field to specify the purpose of this conversation.

Note: State of Minnesota does not use the Promise to Pay checkbox. Only "Regular Conversations" are used.

5. Use the **Review** section to enter review parameters as described below.

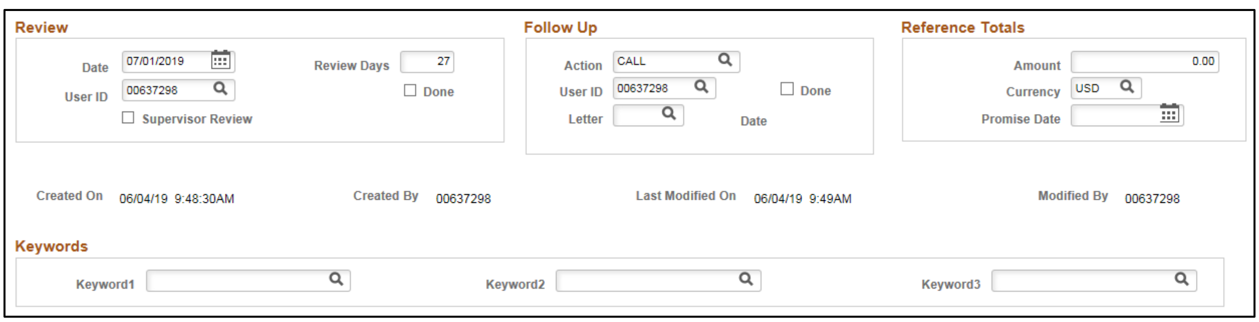


Field Name	Field Description
Date	Optionally, enter the *Date* on which the conversation should be reviewed. **Note**: You can find conversations that are in need of review by navigating to Customers, Conversations, Review Needed.
Review Days	If you enter a *Date*, the *Review Days* field will be calculated automatically.
User ID	The *User ID* of the person who entered data in the **Review** section is automatically supplied.
Done	Check the *Done* checkbox to indicate that the conversation has been reviewed.

Field Name	Field Description
Supervisor Review	Check the *Supervisor Review* checkbox to indicate that the conversation requires review by a supervisor. If you select this check box, SWIFT displays a *Status* field. The default value in this field is “New”. The other values for this field are Incomplete and Reviewed. **Note**: you can locate conversations that require supervisor review by navigating to Customer, Conversations, Need Supervisor Review page.

6. Use the **Follow Up** section to set a follow up action for the conversation.

Field Name	Field Description
Action	Select a follow up action. Options include: Call, Confirmed, Send Invoice, and Verify Payment.
User ID	The *User ID* of the person who entered data in the **Follow Up** section is automatically supplied. You can override this value and select a different *User ID* for user who will be following up on the conversation.
Done	Check the *Done* checkbox to indicate that the action has been taken.
Letter	To use this feature, you must be able to select a *Contact ID* in the Conversation Entries. There is limited use of the Contact feature in Minnesota at this time.



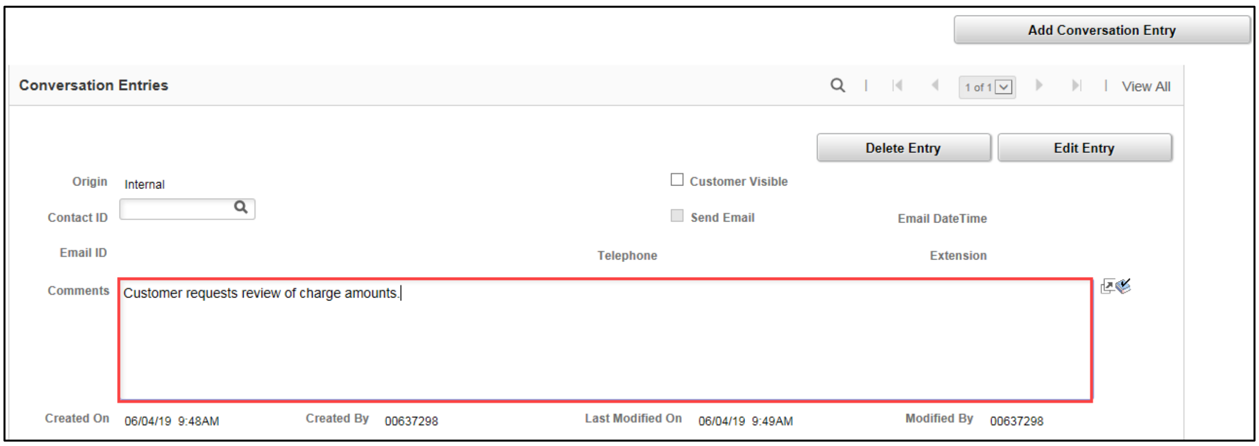
7. Use the **Reference Totals** section to indicate the amount of the item/s referenced in the conversation.

Field Name	Field Description
Amount	Enter the amount of the item/s referenced in the conversation.
Currency	Accept the default “USD”.
Promise Date	Enter the date on which you expect to receive payment.

8. Use the **Keywords** section to enter up to three keywords to categorize conversations for easier retrieval. Keywords must be pre-defined for your agency before you can select values in these fields.

9. Use the **Conversation Entries** section to add conversation entries for each conversation that you have with a customer and for each issue that is related to a conversation.

Field Name	Field Description
Contact ID	There is limited use of the Contact feature in Minnesota at this time.
***Comments**	Enter the text that you want to record for the conversation.
Visible	Minnesota does not use this field at this time

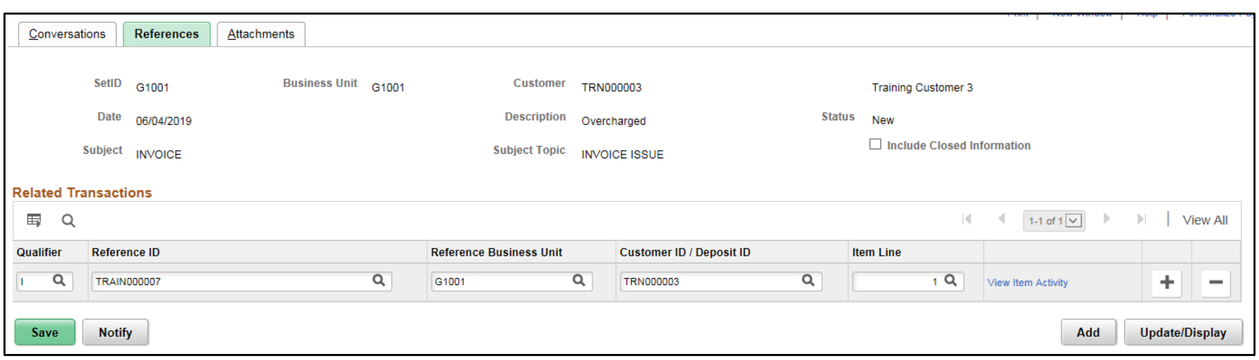


10. Optionally, click on the **Add Conversation Entry** button to add an additional Conversation Entries.

11. Click on the **Save** button to save the conversation.

Step 2: Relate the Conversation to a Transaction (Optional)

1. Optionally, click on the **References** tab to relate the conversation to a transaction.

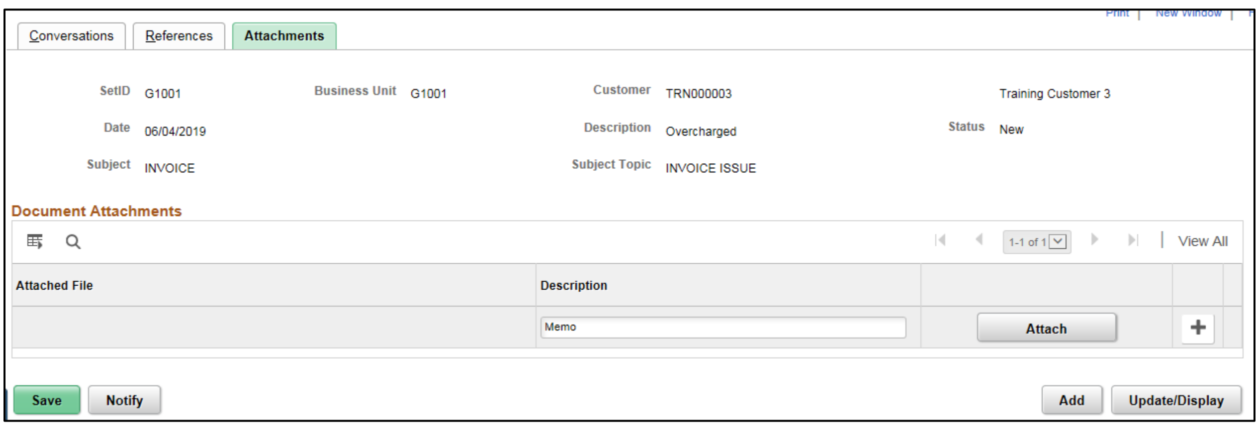


Field Name	Field Description
Qualifier	Click on the **Lookup** icon to select a *Qualifier*. Some of the options include: Invoice #, Item, and Payment ID.

Field Name	Field Description
Reference ID	After selecting the *Qualifier*, the *Reference ID* **Lookup** button becomes available. Enter the *Reference ID* or use the **Lookup** button to select the *Reference ID*.
Business Unit	The *Business* Unit may be supplied automatically after selecting the *Reference ID*.
Customer ID/Deposit ID	The *Customer ID* or *Deposit ID* may be supplied automatically after selecting the *Reference ID*,
Item Line	The *Item Line* may be supplied automatically after selecting the *Reference ID*.
View Item Activity Link	The *View Item Activity Link* may appear after selecting the *Reference ID*. Click on this link to view the **Item Activity** tab for the Item. Click the **OK** button to return to the **References** tab.

Step 3: Add Attachments (Optional)

1. Optionally, use the **Attachments** tab to attach documents to the conversation.



Field Name	Field Description
Description	Enter a description for the attachment.
Attach Button	Click on the **Attach** button and the *File Attachment* dialog displays. Use the **Browse** button to find the document you want to attach. After selecting the document, click on the **Open** button. Click on the **Upload** button to attach the document. If you receive an error message, this option may not be configured for your agency. Contact the SWIFT Helpdesk for assistance.