9.2 Viewing the Customer's Profile and Item Information

Purpose: View a customer's profile and item information using ctcLink.

Audience: Accounts receivable staff.

You can review detailed item information of a customer to get an overview of your business relationship. After you select a customer to review, you can narrow or expand the search criteria and modify items according to your requirements.

Alternatively, you can view all of the customer's items. After you have narrowed the search by item, you can use dynamic columns to further adjust and display the item information. After organizing this information, you can select page options to add conversations, put items in or out of dispute, create open item reports, or view individual item history.

! You must have at least one of these local college managed security roles:

- ZC AR Customer Maintenance
- ZD AR Inquiry
- ZZ AR Customer Maintenance

    If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Viewing the Customer's Profile and Item Information

Navigation: NavBar > Navigator > Accounts Receivable > Customer Accounts > Customer Information > Account Overview

1. The **Account Overview** page displays.
2. Select the **Profile** tab.
3. Enter **Unit**.
4. Enter **Customer**.
5. The **Level** list displays the type of customer relationship. Select **Level** from the drop-down menu.
6. Select **Search**.

7. The **Profile** page displays. Use it to view general information of the selected customer such as an overview of customer contact, balance, and item activity information. You can also view topic-specific profiles such as balance, credit, item, or aging information.

8. Select the **Item List** link.

9. The **Customer Item Inquiry** page displays. Use it to build and view a list of items for a customer that matches your search criteria.

10. Select the **Item** link to view details for a specific item.

11. Select the **Add Conversation** link to access the **Conversations** page, where you can create and track ongoing conversations and promises to pay with a particular customer. You can review and update past conversations or record new ones. You can track invoice and payment issues that you are trying to resolve, as well as other customer inquiries

Customer Item Inquiry

Item List | Advanced Search

SetID WACTC | Unit WA170 | Customer 001000003 | Central Valley School District | *Level No Relationship

*Status Open | Search | Advanced Search

Add Conversation | View/Update Conversations | Account Overview | Display Currency

Row Selection

Range | GO | Select All | Deselect All

Item Action

Select Action... | GO

Item List

Personalize | Find | View All | First 1-2 o

Detail 1 | Detail 2 | Detail 3 | Detail 4 | Detail 5 | Detail 6

Seq Nbr	Select	Item	Line	Activities	Conv	Conversation Exists?	Unit	Customer ID	Status	Terms	Entry Type	Entry Reason	Due ▼	Days Late	Item Balance	Cur
1	☐	DATA			3	Y	WA170	001000003	Open	IMMED	IN		09/24/2018		25.00	USD
2	☐	MSC-0000001678	1	1			WA170	001000003	Open	IMMED	IN		02/07/2018	229	998.00	USD

Search Result Totals

Debits	2	Debit Amount	1,023.00	Currency	USD
Credits		Credit Amount		Currency	USD
Total	2	Total Amount	1,023.00	Currency	USD
Selected				Currency	

Cancel

Item List | Advanced Search

12. Process complete.