University of Maryland Baltimore
Administration and Finance

Office of the Controller

General Accounting
410-706-4569
GeneralAccounting@umaryland.edu

General Accounting
Customer Request System User Guide

OOTC - General Accounting has partnered with **VEOCI** for our new Customer Service Tool to provide a better mechanism for tracking and monitoring customer requests and communications.

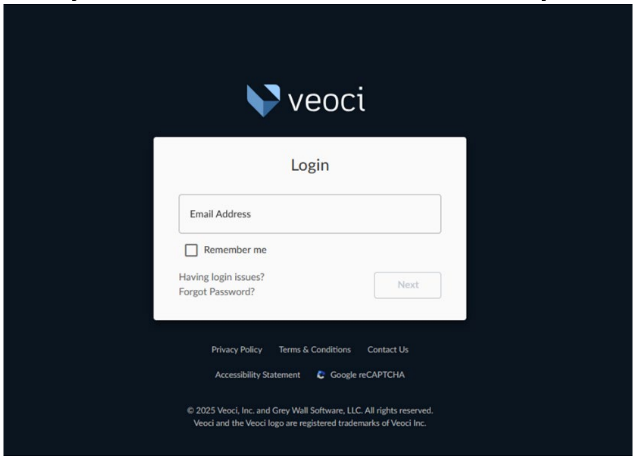
Follow the steps below to access the **General Accounting Customer Request Dashboard** to submit a new request form and to track the status of previously submitted request forms.

Link to the **General Accounting Dashboard** - https://veoci.com/v/p/dashboard/es3dy85cha

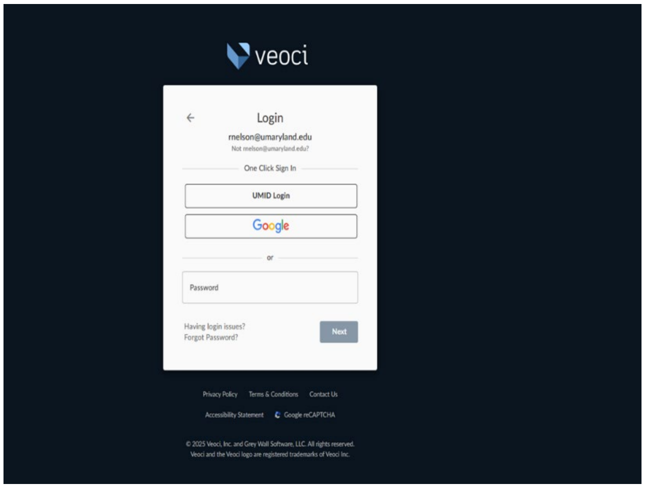
Accessing the General Accounting Customer Requests System

1. Click on this link - https://veoci.com/v/p/dashboard/es3dy85cha

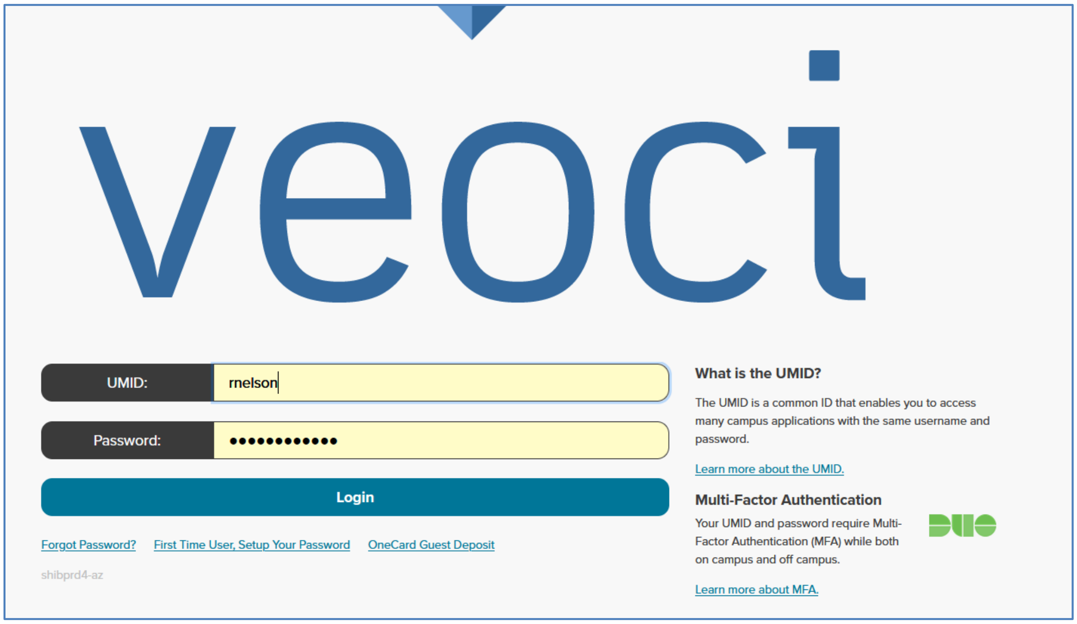
   Enter your UMB email address to alert the system of your UMB credentials.



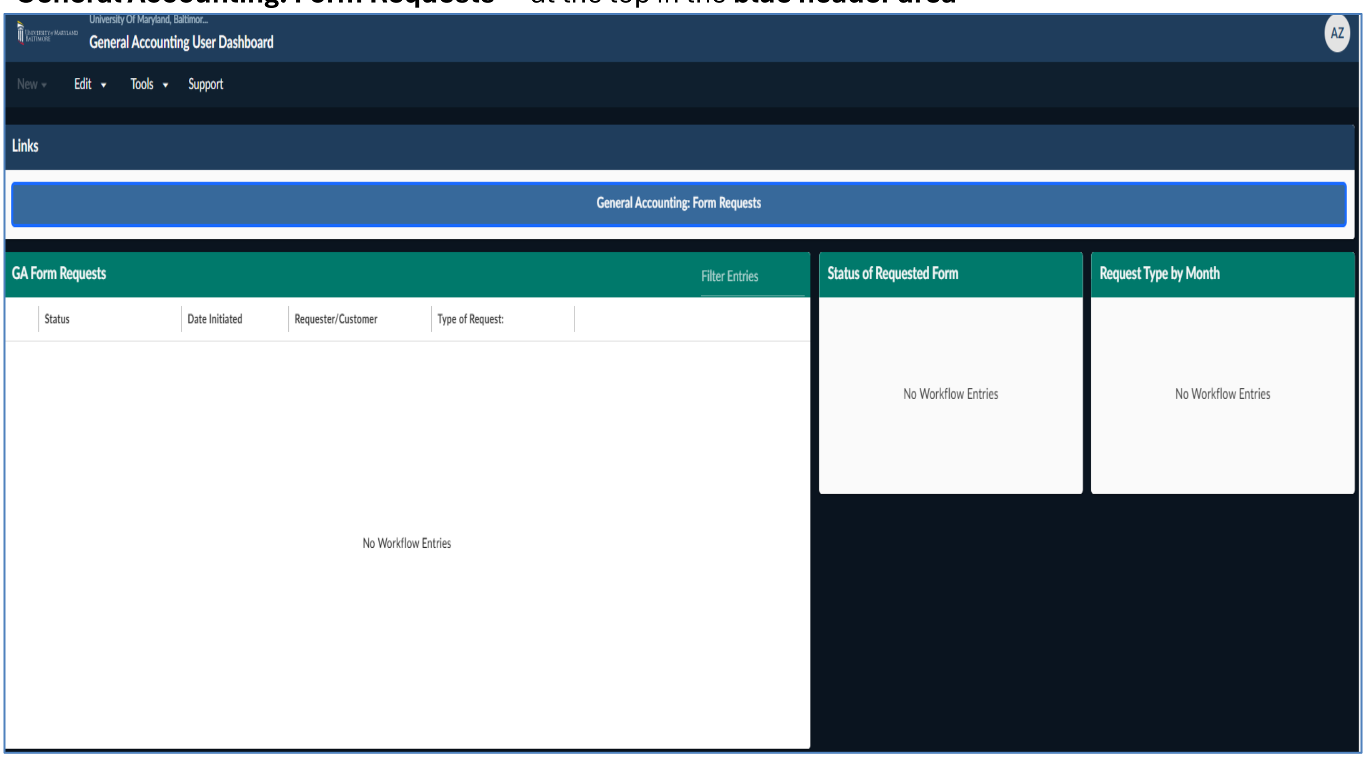
2. This will take you to the next screen, select UMID to access the system through UMB's SSO.



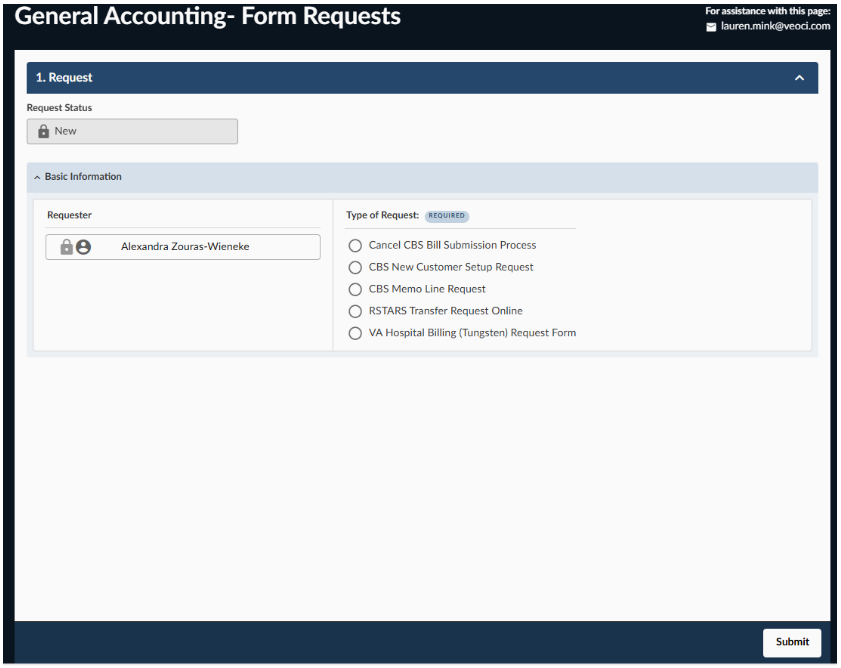
3. Scroll down, to enter your UMB SSO credentials.



4. This will bring you to the **General Accounting Dashboard**. To access the request forms, select "**General Accounting: Form Requests**" - at the top in the **blue header area**



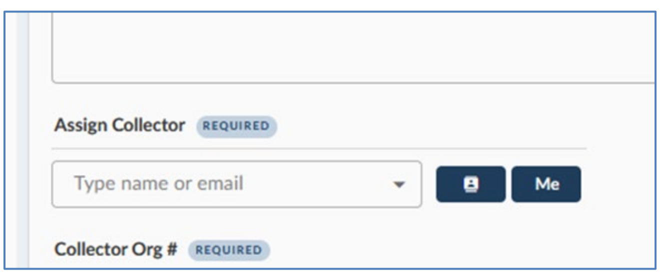
5. **Submitting Customer Request Forms**



a. **Select a Request Form**, from the list in the above screen shot.
Choose the appropriate request form based on your needs.

b. **Filling Out the Request Form**
Complete the necessary information/fields for your request.

To better serve our customers, some new questions have been added to the forms. For example, in the **CBS New Customer Request form,** you will be asked to assign a collector, the collector is the person responsible for the customer bill.
For this, you can either select "me" as the collector or search for/select another user to act as the collector for this request.



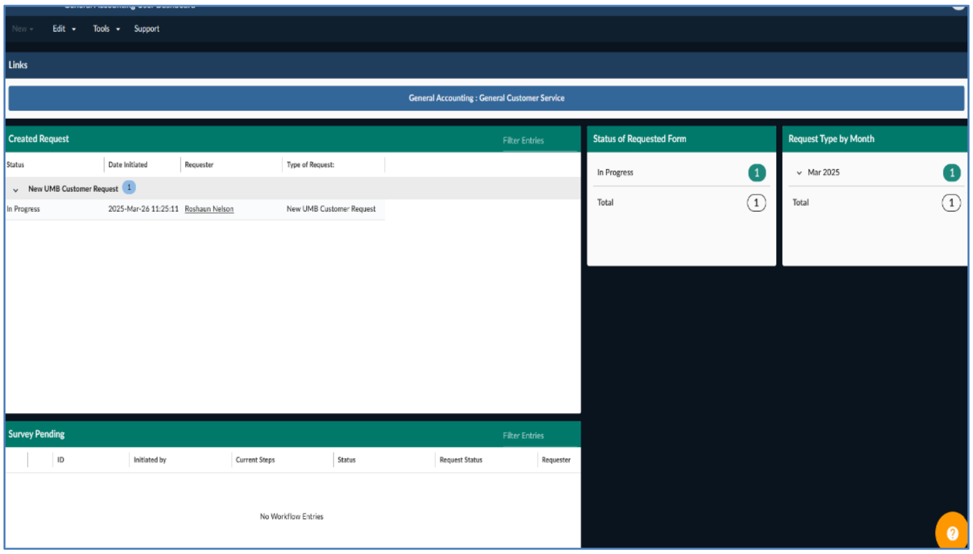
c. **Attach Backup Documentation**
Before submitting the form, ensure you have attached any necessary backup documentation to support your request.

d. Review and Submit

After filling out the form and ensuring all information is accurate and complete, click submit to send your request for processing.

6. User Dashboard

Once your request has been submitted, you will be redirected to your User Dashboard. The dashboard will display a list of all requests you have made along with their status.



7. Additional Notes

a. Make sure to check the status of your request from the dashboard.

b. If you need to make any changes to your request after submission, reach out to generalaccounting@umaryland.edu for assistance.

c. Once we have fulfilled your request and close the ticket, you will receive a short survey rating us on our customer service and timeliness.