

Customer Explorer Collection Information

Last Modified on 11/27/2023 9:18 am EST

Information entered by Users working in Collection Queues is viewable from the Customer Explorer record.

Collections History

When highlighting the Collections option from the customer tree, the entire collection history for the customer is displayed in the Active Pane. In the Description column of the Collection History, the first few characters of the note entered are displayed. If the collection history row was generated by an automated process, the process description will be displayed.

If notes were entered by a User working in collections, the ****Notes**** will be displayed in the collection history. To view the entire, note the User may navigate to the Notes option on the customer tree.

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Viewing Collections Notes

Individual Collection Notes may be viewed by highlighting the Notes option from the customer tree. All notes will be displayed in the Active Pane. If the note entered does not completely display in the Active Pane, you may double-click on a Note record to view all the information that was entered.

To view collection notes only, expand the Notes tree and highlight the Collection Notes folder.

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