

Entering Collection Notes from the Customer Explorer

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Collection Notes may be entered from a Customer Explorer record for a customer that is currently in one of the Collection Queues. If the customer is not in an active Collection Queue, only a General type note may be entered.

1. Highlight the Notes option from the customer tree; right-click and select the Add Note option.
2. The Customer Notes form will be displayed. If the note being entered is collections-related and is to be saved as a Collection type note, select the Note for Current Collection Queue check box at the top of the form. Enter information into the white text box then click the Save button when finished.

The note saved will be viewable from the Customer Explorer and the customer Collection Notes history within the Collection Queue.

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