Customer Collections Tab

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The Customer page has a Collections tab. This shows the collection activities that have been performed for this customer with the following columns:

- Activity Date — Date and time of activity
- Status — Status associated with the activity when it was created
- Activity — Name of the activity as defined in the setup
- Notes — The notes added to that activity when it was created
- As of Queue — The queue the customer is in at the time this activity is created
- Created By — The user that created that activity
- Action Buttons Column — Users can archive any activity in the column, moving them to the archived activities for that customer.

At the top of the grid, add a collection activity by clicking the Add Activity button. Review archived activities by clicking the Show Archived switch.