

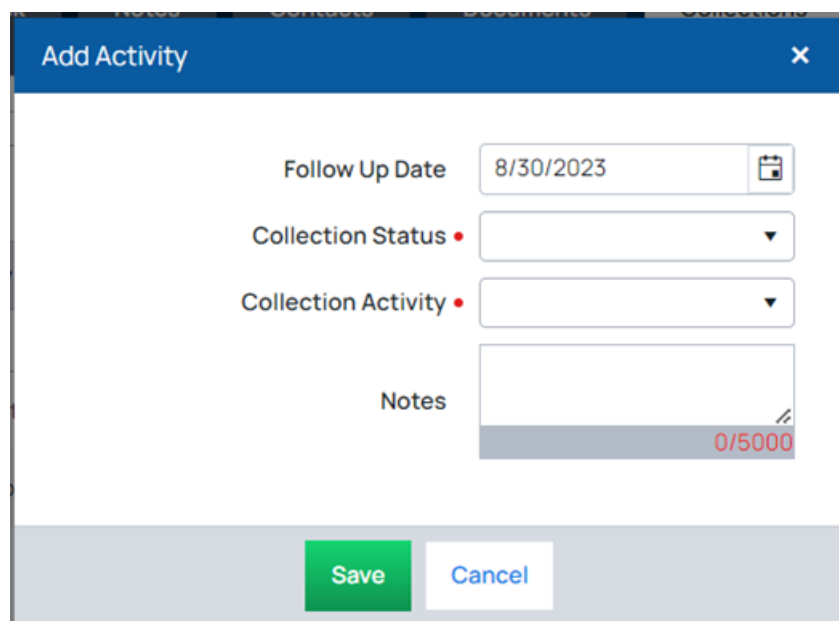
Collections Activities

Last Modified on 09/07/2023 4:01 pm EDT

Collection activities record actions taken by users while trying to collect on a customer.

You can add a collection activity from either the collection queue or the customer's detail page on the Collections tab. Click the Add Activity button:

- Collection Status – This is a dropdown that contains all collection statuses. This defaults to the status that is currently assigned to the customer; if this is changed, the customer's collection status is updated as well.
- Collection Activity – Activity name as defined in the setup
- Notes – The notes added to that activity when it was created



The screenshot shows a modal window titled "Add Activity". It contains the following fields:

- Follow Up Date:** A date input field with a calendar icon, currently showing "8/30/2023".
- Collection Status:** A dropdown menu with a red dot indicator and a downward arrow.
- Collection Activity:** A dropdown menu with a red dot indicator and a downward arrow.
- Notes:** A text area with a red "0/5000" character count at the bottom right.

At the bottom of the modal, there are two buttons: a green "Save" button and a white "Cancel" button with a blue border.

After adding and saving an activity, it appears on the customer's collection activities, recording the date and time that the activity was created; the queue that the customer was in when the activity was created; and the user that entered that activity.