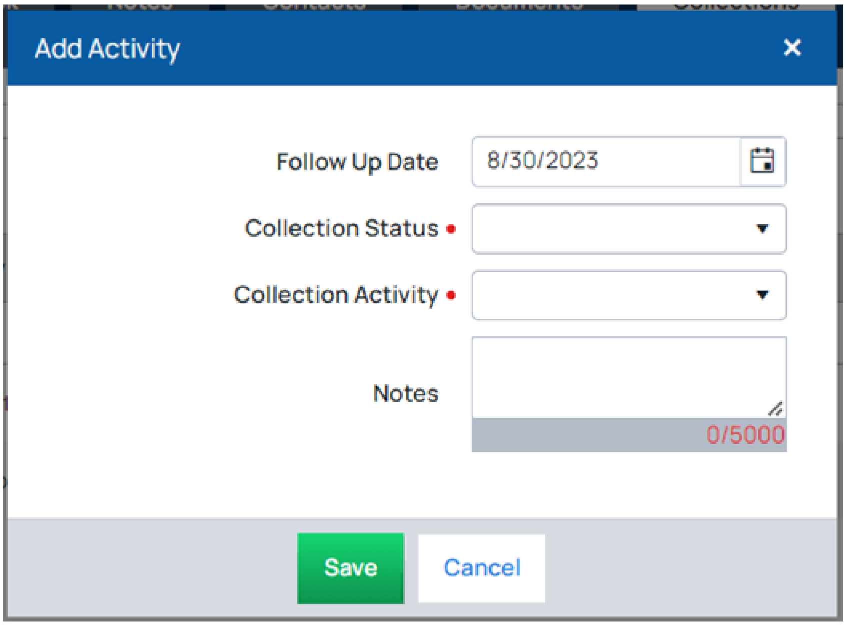
Collections Activities

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



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.