



## Notes in Collections

The **Notes** tab enables you to document any communications you may have had with the customer. It is a great reference tool for colleagues within the department as they can get a full understanding of the customer situation.

Navigate: Collections → Collectors Work Queue → Delinquent Bill To → Specific Customer

The screenshot shows the 'Notes' tab in a software application. The window title is 'Collections - HSBC BANK PLC, London'. The 'Collections Status' is set to 'Delinquent'. The 'Operating Unit' is 'Cambridge University'. The 'View' is set to 'Bill To' and 'EA\_LONDON'. The 'Amount Overdue' is 1,490.00 GBP and the 'Net Balance' is 1,490.00 GBP. The 'Last Payment Paid On' is 15-APR-2013 and the 'Last Payment Due On' is 14-MAR-2013. The 'Business Level' is set to 'GBP'. The 'Credit Statistics' tab is selected, and the 'Notes' sub-tab is active. The 'View from' date is 02-NOV-1986 and the 'To' date is 19-MAR-2015. The 'Display' button is visible. The table shows two notes: one from 18-MAR-2014 by Carter, Mr. Finn C. with the note 'David Smith no longer works th...' and another from 18-MAR-2014 by Carter, Mr. Finn C. with the note 'Sam Smith Account manager e...'. The 'Note' field is highlighted in yellow, and the 'Type' is set to 'Callback', 'Status' is 'Public', and 'Created by' is 'CARTER, Mr Finn C'. The 'Note' text area contains 'David Smith no longer works there'. The 'New' button is visible at the bottom left.

- Click on **New**
- The field **Note** will now turn yellow and is a free text field for you enter information of your choice
- Type** – Select appropriate option from list of values
  - Status** – keep as **Public**. This will allow all collectors in your group (i.e. Department) to view this information. Be reassured if other departments bill the same customer they will not be able to see what you have documented.
  - Date** - the system will automatically enter the date the note was created.
  - Created by** – The individual creating the note (the name will appear in same format of HR record).
- Save** the note after completion. Note will now appear to the left of free text field which is available to review at any time.