

Subject: Updating Creditor Information	Product: Customer Loyalty Group	Approved on:
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Purpose:

Updating creditor information in QuickBase.

Policy:

- Client received correspondence from a new creditor or collection agency for an enrolled account.
- Client received correspondence stating an account has a new/updated balance.
- Client received legal notice/documents.
 - Reference [Legal Process SOP](#)
- Customer Loyalty Group receives an email from Global Client Solutions obtaining creditor correspondence that they received from the client.

Procedure:

1. From the Client Page, click or scroll down to the *Creditor Section*
2. Click the *Edit* pencil next to the creditor that needs updating
3. Click or scroll down to the *Creditor Profile Section*
4. In the *Reference Number* field, enter the reference and/or file number provided on the correspondence
5. From the *Account Number Verified on* field, select today's date
6. Scroll down to the *Creditor Detail/Comments Section*
7. In the *Current Balance* field, enter the current balance provided on the correspondence
8. If creditor information is being updated to a new creditor/collection agency:
 - a. From the *Related Current Creditor Primary* dropdown, select the new creditor that is collecting on the account
 - i. From the dropdown, click *<Browse choices...>*
 - ii. Enter the name of the new creditor/collection agency in the search box
 - iii. Click *Search*
 - iv. Select the correct creditor/collection agency
 - v. Click *OK*
 - b. As pictured below, in the *Special Notes* field, note updated changes
 - i. *"Updated creditor to [name of creditor/collection agency]"*

Special Notes

[OCT-29-18 5:27 PM Orioles SA] System: Auto FAX: 1436032\1436032_Creditor_Authorization_Signed.pdf

[OCT-26-18 5:23 PM Orioles SA] System: Auto FAX: 1436032\1436032_Creditor_Auth...

[Show All Entries](#)

Updated creditor to Zwicker & Associates

- c. Scroll down to the *Legal Section*
- d. From the *Legal or Collection* dropdown, select *Collection*

9. Click the *Save & Close* button

Latest Revision Date: 8/30/2019	Page 1 of 2	Author of Latest Revision: Taylor Soden
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10. Go back to the Client Page
11. Notate all changes that were made on the Creditor Page in the *Comment section*
 - a. Reference [Agent Notes SOP](#)

Exceptions:

- If client correspondence is received from Global Client Solutions, we must contact the client verbally or written advising that all future creditor correspondence should be sent to the Customer Loyalty Group.

Latest Revision Date: 8/30/2019	Page 2 of 2	Author of Latest Revision: Ta'lor Soden
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