

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, notate 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

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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.

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