Collection Notes on the Age Analysis

The **Aged Receivable** and **Aged Payable** reports (your *age analysis*) now have two extra columns:

- **Account No** – the customer's / supplier's account number, so you can match a line straight to the account.
- **Collection Note** – a free-text note you can type **right on the report**.

The note is saved **on the customer**, not on a single statement, so it stays with them. The next time that customer is overdue and shows up on the age analysis, your note is still there – no need to open each account to remember what was said.

> Example: type *"Promised to pay by the 30th"* next to a customer today. When you run the age analysis again next week, that note is still next to their name.

Where to find it

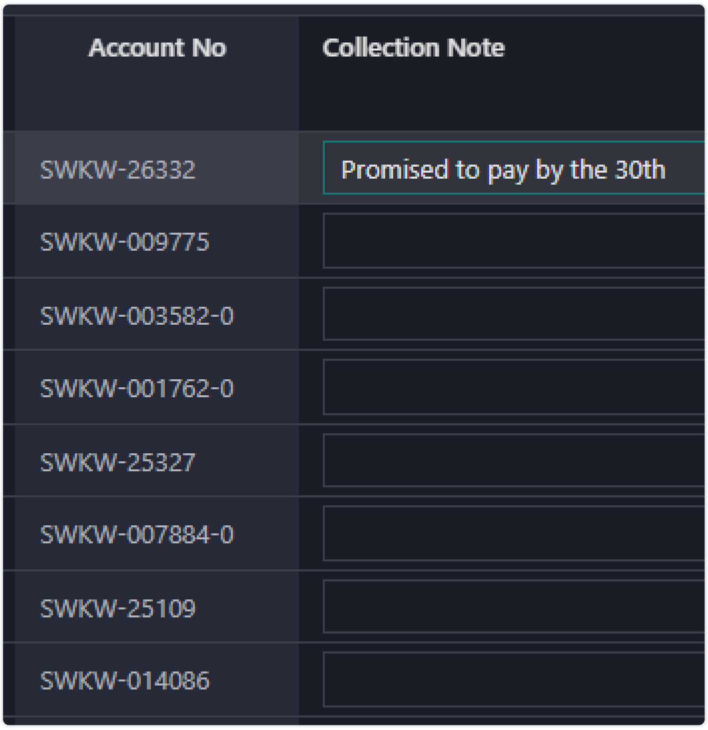
Open the **Accounting** app, then:

Reporting → **Aged Receivable** (debtors) – or **Aged Payable** (creditors).

The two new columns appear on the right of the report, next to the ageing buckets (Current, 1-30, 31-60, …).

Adding or changing a note on the report

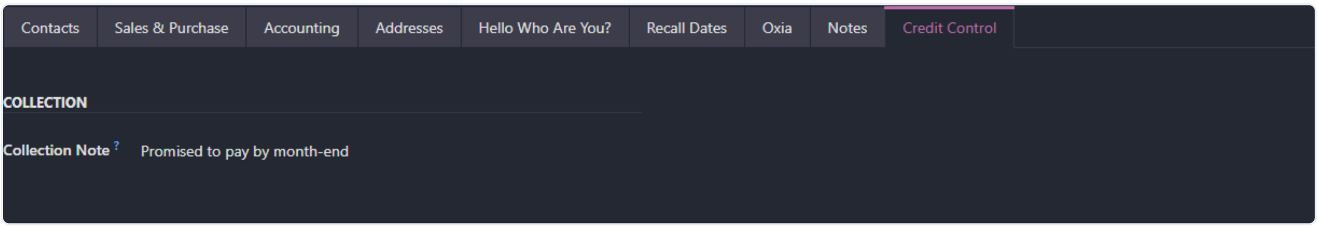
Click in the **Collection Note** box on a customer's line and start typing. Press **Enter** (or click away) to save – that's it.



- The note saves immediately, against that customer.
- Leave it blank to have no note; clear the text to remove one.
- The **Account No** next to it is read-only – it comes from the customer's account number on their contact card.

Where else the note lives

Because the note is stored on the customer, you can also see and edit it on the **customer's contact card**, under the **Credit Control** tab:



Whatever you type on the report shows here, and the other way around – it is the same note in both places.

Good to know

- **It's reused automatically.** The note follows the customer. Pay off the account today and run up a new balance next month – the note is still there on the age analysis.

- **Both age analyses.** The columns appear on **Aged Receivable** and **Aged Payable**.
- **It exports too.** When you export the report to **Excel (XLSX)**, the Account No and Collection Note come across with it.
- **Who can edit.** Anyone who can open the accounting reports can read and write the note.

Need a change to this – different wording, a fixed list of statuses instead of free text, or the note somewhere else? Contact Humint support and we'll help.