Collections Queue

The Collections Queue is for organizing, managing, and prioritizing the collections your business will use for customers. Use this to create and edit your collection queues.

To create or edit these, users must have the Collections role. This is on the Edit User page (Setup > Company > User Manager).

To see the Collections Queue Setup, browse to Setup > Collections > Collections Queue.

To add a collections queue, click + Add Collections Queue.

This form has these fields:

- Name — Name for the collection queue
- Description — This is a text field used to describe the queue being created (required)
- Customer Type — This is a radio button that determines if only residential, commercial, or both types of customers can be placed in this queue. The default is Both. Customers are set as commercial or residential when they are created. (required)
- Branch — This is populated with the branches your company has defined. You can select multiple branches to associate with the queue. (required)
- User Access — This field determines the users who can open this queue. This field includes all users with the 'Collections' permission enabled. You can select multiple users to provide access. If no users are selected, all users with the 'Collections' permission have access to this queue.
- Auto Sequenced Queue? — This determines if a customer is automatically placed in the collection queue based on the rules set up for the queue. The default is No. If switched to Yes, the form shows the Auto Sequencing Number field.
- Auto Sequencing Number — If the Auto Sequenced Queue switch is Yes, this field is required. This is a numerical field that determines a priority order that a customer gets placed in a queue. The highest number takes the greatest priority in a queue. (This field is hidden if the Auto Sequenced Queue switch is No.)
- Initial Collection Status — This field populates with all created collection statuses. (required)
- Days Past Due — This determines the days past due that a customer needs to be on any given invoice to be placed in the queue (required)
- Minimum Amount Past Due — This determines the minimum amount of past due invoice total amounts due that a customer needs to have to be placed in the queue (required)