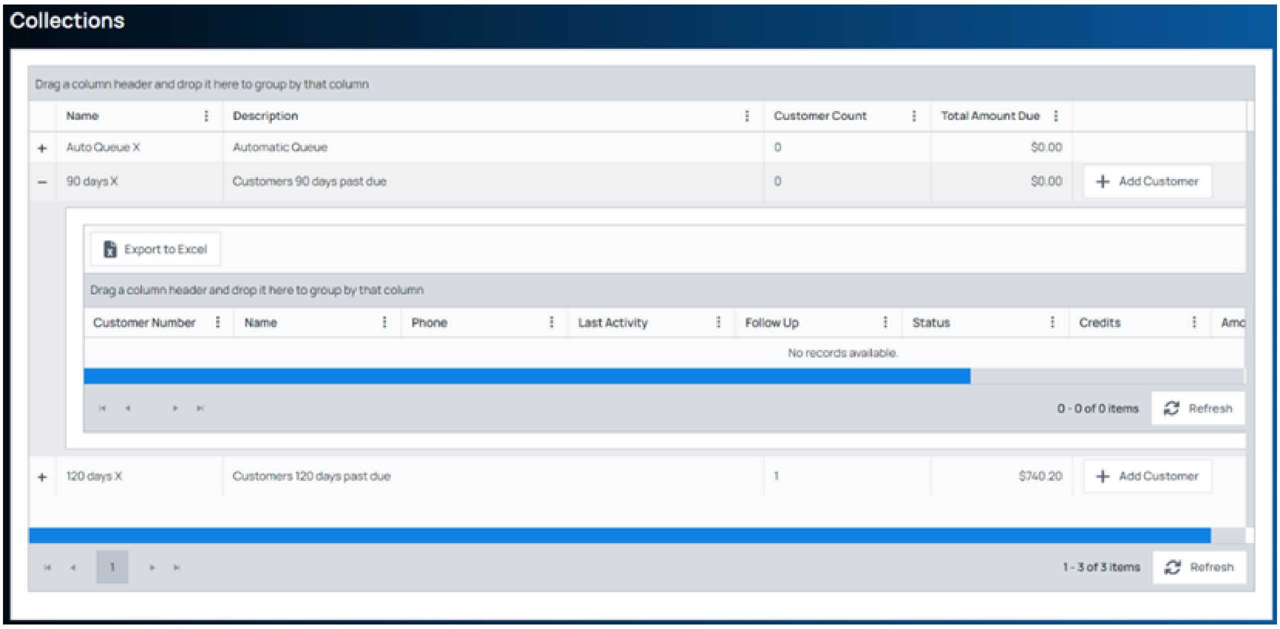
Collections

Last Modified on 10/31/2024 3:21 pm EDT

The Collections page has a grid that lists all collection queues created in the setup. The grid shows these columns:

- Name — This is the name of the collection queue from the queue's setup.
- Description — This is the description of the collection queue from the queue's setup.
- Auto Sequenced Queue
- Auto Sequencing Number
- Customer Count — This is a count of all the customers that are currently in that queue.
- Total Amount Due — This is the sum of the total amount due for all the customers that are in that queue.



On the Collections page, expand a queue Name to see the customers (if any) in that queue and to add customers to that queue. A collection queue grid shows information regarding past-due customers and the state of their balance. Use this to complete certain actions regarding these customers. The grid has these columns:

- Customer Number — This is the billing customer number. This is a link to that customer's detail page.
- Name — This is the customer's name.
- Phone — This is the phone number displayed in the Phone 1 field for the Primary Bill To for the customer.
- Last Activity — This is the most recent collection activity added for this customer.
- Follow Up — This is the follow-up date indicated on the most recent collection activity (if any).
- Status — This is the current collection status name of the customer.
- Credits — This column displays the total credits on the customer account including unapplied payments, advance deposits, and unapplied credits.
- Amount Due — This is the total amount due on the customer account, which is a total of all amounts due in each aging bucket less any credits on the customer account.

You can complete these actions:

- Add a customer to a queue (+ Add Customer button at the top of each collections queue) that is marked as non-sequenced in the setup, as customers can only be manually added to a non-sequenced queue.
- Export to Excel to download an Excel file of the grid's contents.
- In a grid row, click the Add Activity button to add an activity for that customer.

- In a grid row, click the Move Queues button to move a customer to any non-sequenced queue.
- In a grid row, click the Remove From Queue button to remove the customer from the collections queue. This is only available in non-sequenced queues.