

# Collections

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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.
- 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.

The screenshot shows the 'Collections' page interface. At the top, there is a header 'Collections' and a sub-header 'Drag a column header and drop it here to group by that column'. Below this is a table with columns: Name, Description, Customer Count, and Total Amount Due. The table lists two queues: 'Auto Queue X' (Automatic Queue, 0 customers, \$0.00) and '90 days X' (Customers 90 days past due, 0 customers, \$0.00). An 'Export to Excel' button is visible. Below the table, there is a detailed view for the '120 days X' queue, showing a grid of customer records with columns: Customer Number, Name, Phone, Last Activity, Follow Up, Status, Credits, and Amount Due. The detailed view shows 'No records available' and a 'Refresh' button. The main table also has an 'Add Customer' button for the '120 days X' 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.