

Sequenced Collection Queues

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Sequenced collection queues have the Auto Sequence Queue? switch turned to yes. These automatically pull customers into the queue based on that customer's balance and how past due they are. There are multiple checks performed to automatically place a customer into a queue, as a customer can be placed in only one queue at a time:

- Do any of the customer's invoices have a total amount due falling into the Days Past Due specification in the queue's setup?
- Is the sum amount due of the invoices that fall into the Days Past Due specification greater than the Minimum Amount Past Due specification in the queue's setup?
- Does the customer fall into the customer type restriction specified in the queue's setup?
- Are any of the sites associated with the invoices that meet the past due and minimum amount past due requirements tied to a branch that is specified in the queue's setup?

If the answer to all of the questions is yes, then the customer is placed into the queue automatically.

If a customer meets multiple sequenced collection queue criteria, Managely prioritizes the queue that has the highest Auto Sequence Number specified in the queue's setup.

When a customer is initially placed in a queue (only when the customer was not previously in any collection queue), Managely automatically updates the customer's collection status to the Initial Collection Status specified in the queue's setup. If the customer is being moved from one queue to another queue, Managely does not automatically update the customer's collection status.

When a customer is placed in a new queue, Managely generates a collection activity for that customer using the Added to Queue activity. This records the collection status of the customer; the date and time the customer was placed in the queue; and the user that placed the customer in that queue. If the customer was placed in that queue via the auto-sequencing function, the user is the "system".

You can manually move or add customers to non-sequenced queues. When a customer is moved to a non-sequenced queue, Managely ignores the logic that would otherwise automatically place that customer in a sequenced queue, keeping the customer in the non-sequenced queue regardless of whether they meet the specifications of a sequenced queue. Customers can also be removed from a non-sequenced queue. If that customer still meets the requirements of a sequenced queue, Managely will add the customer to the sequenced queue that meets the requirements.