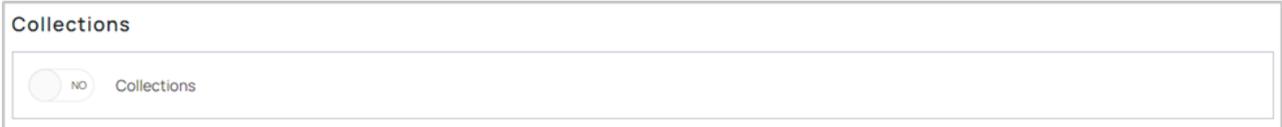


Collections Queue

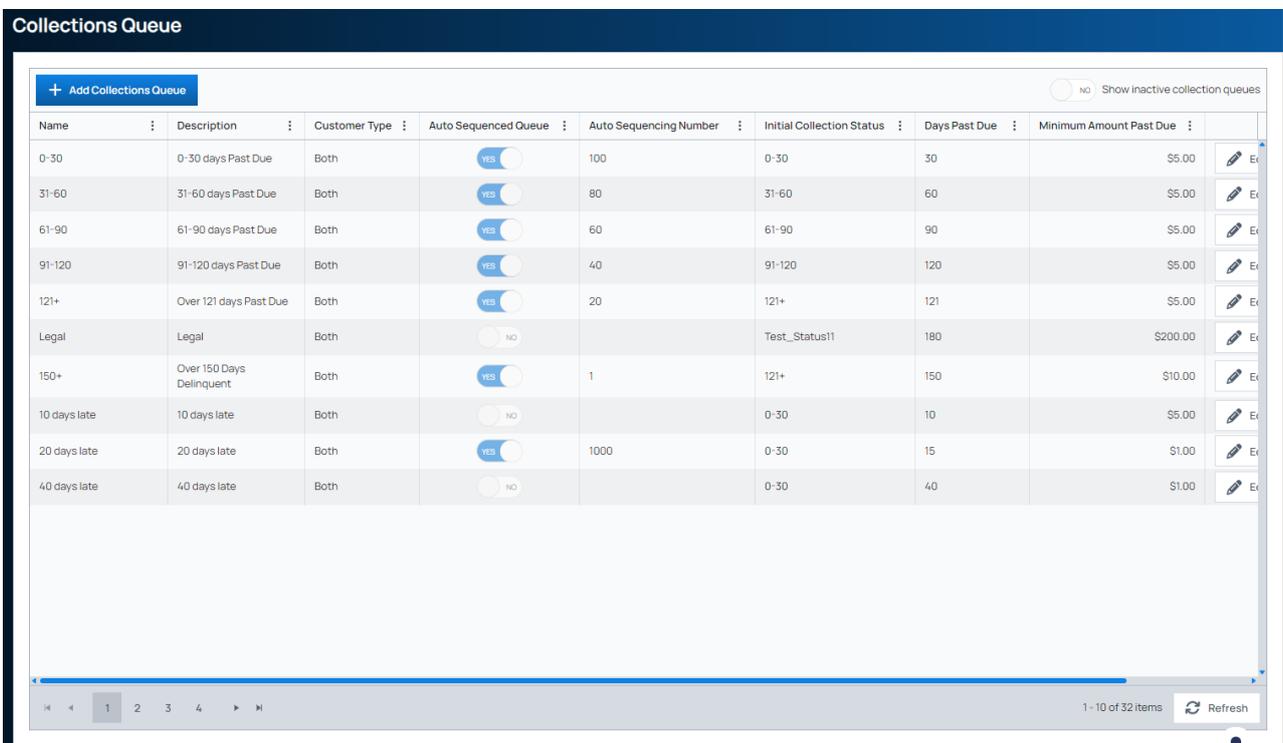
Last Modified on 03/04/2026 7:11 pm EST

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.



The screenshot shows the "Collections Queue" setup page. At the top left is a button "+ Add Collections Queue". At the top right is a toggle switch "Show inactive collection queues" in the "NO" position. Below is a table with the following columns: Name, Description, Customer Type, Auto Sequenced Queue, Auto Sequencing Number, Initial Collection Status, Days Past Due, and Minimum Amount Past Due. Each row also has an edit icon.

Name	Description	Customer Type	Auto Sequenced Queue	Auto Sequencing Number	Initial Collection Status	Days Past Due	Minimum Amount Past Due	
0-30	0-30 days Past Due	Both	<input checked="" type="checkbox"/>	100	0-30	30	\$5.00	
31-60	31-60 days Past Due	Both	<input checked="" type="checkbox"/>	80	31-60	60	\$5.00	
61-90	61-90 days Past Due	Both	<input checked="" type="checkbox"/>	60	61-90	90	\$5.00	
91-120	91-120 days Past Due	Both	<input checked="" type="checkbox"/>	40	91-120	120	\$5.00	
121+	Over 121 days Past Due	Both	<input checked="" type="checkbox"/>	20	121+	121	\$5.00	
Legal	Legal	Both	<input type="checkbox"/>		Test_Status11	180	\$200.00	
150+	Over 150 Days Delinquent	Both	<input checked="" type="checkbox"/>	1	121+	150	\$10.00	
10 days late	10 days late	Both	<input type="checkbox"/>		0-30	10	\$5.00	
20 days late	20 days late	Both	<input checked="" type="checkbox"/>	1000	0-30	15	\$1.00	
40 days late	40 days late	Both	<input type="checkbox"/>		0-30	40	\$1.00	

At the bottom of the page, there is a pagination bar showing "1 - 10 of 32 items" and a "Refresh" button.

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:** Choose the type of customers than can be place in this queue: residential, commercial, or both. 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)

Deactivating a Collections Queue

To deactivate a collections queue, click the Delete button in the grid row for that queue. Deleting a collections queue that has customers in the queue makes it inactive. (**Note:** If there are no customers in the queue, it is deleted.) To see inactive collections queues, change the **Show inactive collection queues** switch from NO to YES.

Deleting a collections queue that has customers makes the queue inactive and removes the customers from the queue. This is shown on the customer detail page Collections tab:

Activity Date	Status	Activity	Notes	As Of Queue	Created By		
Feb 23, 2026	Past Due X	Removed from Queue	Removed from 90 days X (Queue inactivated)	90 days X	user004sf	Archive	Edit Note
Dec 19, 2025	Past Due X	Added to Queue	Added customer to 90 days X	90 days X	Managely	Archive	Edit Note

To reactivate a queue, change the **Show inactive collection queues** switch from NO to YES, and click the Reactivate button in the row for the queue you want to reactivate.

Reactivating a collections queue restores it for use but does not put customers back that were in the queue before. If you want customers in the reactivated queue, add them on the Collections page (Accounts Receivable > Collections).