Collections Overview and Topics

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Collecting delinquent customer accounts is a part of everyday business. The SedonaOffice application provides tools to track, manage, and report on customer delinquencies as they occur.

The Collections option within the Client Management module is used to set up new Collection Profiles as well as manage and track Collection activities performed by Collectors. A complete Collections history is displayed on the Customer Explorer record for customers who have ever entered into a Collection Queue. This is valuable information for spotting trends in chronically slow-paying customers so that your company may plan for more proactive measures for these types of customers.

While a customer is in a Collection Queue, the Customer Explorer record displays the Collection Status and the name of the Collection Queue in which the customer currently is listed. This is to alert any User accessing that customer record of the delinquency situation. The Collection Status of a customer in collections is also displayed in bold red text on the Notifications page of the Service Ticket form when creating a new Service Ticket or working with an existing Service or Inspection Ticket.

Note: A customer can only be in one Collection Queue at a time; if delinquent, the customer will be placed in the collection queue for the rules that meet the most delinquent customer invoice.

Collections Topics

Follow the links below for other Collections topics.

	User Group Security
Concepts & Terminology	Collections work flow
Collection Profile Planning	Collection Profile Setup
Understanding the Collection Queue	Refreshing Collection Queues
Working in a Collection Queue	Removing a Customer from Collections
Customer Explorer Collection Information	Entering Collection Notes from the Customer Explorer
Changing a Customer's Collection Status	Collection Queue Function Buttons
Add a Customer to a Collection Queue	Add Collection Notes

Add a Manual Event

Move a Customer to Another Collection Queue

View Collection Event History

Select All in Queue

Bulk Collection Letters Overview

Bulk Collection Letters Setup

Mail Merge Single Letters

Mail Merge Bulk Letters

Delete / Close a Collection Profile