

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.

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