Understanding the Collection Queue

Last Modified on 01/09/2023 11:09 am EST

This article should be considered required reading for all Users working in Collection Queues.

Before working in any Collection Queue, it is important to understand the information displayed in the Collection Queue and the source of that information.

Each Collection Queue displays a listing of all customers that met the rules assigned to the Collection Profile for the Collection Queue. The Collection Queue is designed to provide a Collector with information needed when speaking to a customer. Amounts displayed in the aging columns of the collection queue are totals of invoices for each Accounts Receivable Aging Bucket. A Collector will typically open the Customer Explorer to view and gather detailed information on the delinquent invoices prior to calling to the customer.

If desired, the Collection Queue may be printed. While a Collection Queue is being viewed, clickPrint Preview from the Application Function Buttons. Due to space limitations, the aging columns displayed in the collection queue are not printed on this report.

At the top of the Collection Queue is a series of Collection Queue Function Buttons, follow the link for complete information on the functionality of each of these buttons.

Each of the columns displayed in the Collection Queue will be described below.

Customer# - This is the billing customer number.

Name – This is the Customer Name found on the customer Setup Information form.

Phone – The phone number displayed is the Phone 1 field for the Primary Bill To for the customer.

Last Activity – The last Collection Activity performed for the collection customer. This field is automatically updated when a User enters a Collection Event and selects a collection activity.

Follow Up – This field is manually updated by the User. Follow up dates are entered when creating a Collection Event; this is the next date the User should work with the collection customer.

Status – This is the current collection status of the customer. Collection statuses may be manually changed when creating a Collection Event. If the customer was previously in a less or more delinquent collection queue, the last collection status assigned to the customer will be displayed.

Amount Due – This is the total amount due on the customer account which is a total of all amounts in each aging bucket less any credits on the customer account.

Credits – This column displays the total credits on the customer account including unapplied cash, advance deposits and unapplied credit memos.

Aging Columns – Amounts will be displayed in each column for the total invoice amounts due in each of the accounts receivable aging buckets.

Include Late Fees in Amount Due – If your company is calculating and printing late fees on customer statements or on one of the Invoice/Statement invoice forms, this option should be selected. Any Late Fees assessed to the customer account will be included in the customer's Amount Due column. If the User wants to see how much the customer owes not including Late Fees, this option may be toggled on or off at any time. Late Fees are a good negotiating tool in attempting to collect customer payments.

At the lower left of the Collection Queue there are two display fields; Total Due and Quantity. The Total Due is the total amount due for all customers listed in the collection queue. The Quantity is the count of all customers listed in the Collection Queue. If the Include Late Fee Amounts option is selected in the header area of the Collection Queue, the Total Due will include the total of all Late Fees on all customers in the queue.

When a line is highlighted in the collection list, the name, address and phone number of the customer will be displayed in the header section of the Collection Queue. The Total Amount due in invoices, the Total Amount of Credits and any Late Fees on the customer account is also displayed in the header section.