

# Concepts and Terminology

Last Modified on 11/27/2023 8:58 am EST

The workflow for processing collections customers depends mostly on your company's internal policies and procedures. The one setup table used in Collections, Collection Status, should be carefully designed to display words to non-collectors and non-accounting related employees that will guide the User in taking appropriate action when accessing a Customer Explorer record for a customer that is in collections. For example, if a customer is in the 90-days past due Collection Queue and the Collection Status words displayed are 90-days past due, this does not instruct a Service Dispatcher to take any specific action. Collections Statuses such as No Service or Contact Accounting may be more appropriate Collection Status words.

□

When a customer first enters a Collection Queue, that customer's collection record and customer explorer record are flagged with the default Collection Status assigned to the Collection Profile of which the customer qualifies. The customer's collection status will remain the same unless a User manually changes the collection status. If a customer becomes more delinquent and is automatically escalated to a more delinquent collection queue, the customer's collection status will not change. This will alert a User working a more delinquent collection queue of a new customer entering their working collection queue.

□

A tool often used by collectors is the Customer Critical Message. Critical Messages are set up on the Customer Setup Information form within a Customer Explorer record. Once a Critical Message is set up for a customer, a pop-up information form will be displayed to any User accessing the Customer Explorer record, when attempting to open or access a Service or Inspection Ticket, when attempting to create or view an existing Job for the customer, or when entering a payment for the customer.

□

There are two types of Collection Queues; sequenced queues and non-sequenced queues.

## Sequenced Queues

Sequenced Queues determine in which Collection Queue a Customer should be placed based on the setup criteria of the Collection Profile. With Sequenced Queues, Customers are placed in the appropriate queue each time the Auto Refresh Process is run for the Collection Queues or when a payment or credit is applied to the Customer.

When creating Sequenced Queues the sequence number is very important, as this will determine the Collection Queue in which the customer will be placed. The lowest sequence number indicates the most delinquent rules and the highest sequence number indicates the least delinquent rules.

## Non-Sequenced Queues

Non-Sequenced Queues are manual Collection Queues into which a customer may be moved from a Sequenced Queue. Once a Customer is placed in a Non-Sequenced Queue the Customer will remain there until it is manually removed from the queue. Non-sequenced queues are typically used to escalate a collection customer to a senior management staff member when normal procedural collection efforts have been exhausted. Non-sequenced queues may also be used to hold collection customers while legal action is being pursued by your company.

□

## Terminology

The following terminology is related to Collections Processing within the SedonaOffice application.

**Collection Profile** – A collection profile is a set of rules that determines when a customer will be placed in a Collection Queue.

**Collection Queue** – A Collection Queue is a list of customers that meet the rules of a particular Collection Profile.

**Collection Status** – A label attached to a customer in a Collection Queue that identifies the delinquency/action to be taken when non-collector and non-accounting staff are speaking to the customer.

**Collection Activity** – A collection activity is a code that is selected when a User is entering a collection event for a customer in a collection queue. This code describes the action taken by the collector; i.e. Sent Letter, Made Phone Call, etc.

**Collection Event** – A Collection Event is the recording of a collector's activity in an attempt to collect a customer payment. A collection event typically involves selecting a particular collection activity code, a follow-up date, and entering collection notes for a customer in a collection queue.