

# Collections Profile Planning

Last Modified on 11/27/2023 9:13 am EST

Before setting up any Collection Profiles, it is best to first map out on paper how delinquent customers will be escalated and when, and ask yourself the following questions:

- If your company is operating under multiple branches, will collection profiles be created with rules for each branch?
- Do you need to set up non-sequenced queues, and if so for what purpose and how will they be labeled?
- Have Collection Statuses been created that are descriptive enough to communicate to non-accounting type staff what to do when encountering a customer in a particular collection queue?

Below is a sample chart of information that is required setup for each Collection Profile, to assist your company in mapping out a Collections setup plan.

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