Collection Profile Setup

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Creating a New Collection Profile

Once your company has determined the rules to be used for collections, you may begin setting up the Collection Profiles. If only one User is to have access to a Collection Profile and the Collection Queue associated with it, then the User who will have access to that Collection Profile must be the logged-in User when the Collection Profile is created.

It is recommended to begin with the most delinquent Collection Profile first and work your way down to the least delinquent Collection Profile. When assigning sequence numbers to Collection Profiles, leave a gap between sequences to allow for additional Collection Profiles to be inserted as needed in the future.

Important Note: When using sequenced Collection Queues, a sequence number may be used only once. If your company decides to change the collection rules at a later time, the same sequence number may not be re-used.

In this example, we will be creating our most delinquent Collection Profile which is over 120 days past due.

1. From the Client Management Module, select the Collections option.

2. The Collections Profile List will be displayed. click the New Collection Profile button located on the upper toolbar.

3. The Collection Profile Setup form will be displayed. There are many options on this setup form, each of which will be described below.

Description – Enter a description for the Collection Profile. The Collection Profile is displayed on the Customer Explorer record. The User may enter up to 50 characters in this field, however, due to space limitations, only the first 25 characters will be displayed in the Customer Explorer.

Customer Type – Select the type of customer to be included in this Collection Profile; Commercial, Residential, or Both.

Customer Number Range – If your company is not auto-numbering customer accounts, this option will probably not be meaningful.

Branch Selection – If your company is operating under multiple branches and Collection Profiles are being created for one or multiple branches, select the desired branches by checking the box to the left of each customer branch to be included. Otherwise, select the All Branches option check box.

Initial Collection Status – Make a selection from the Collection Status drop-down list that will be assigned to all customers who meet the rules of this Collection Profile. This is a required field.

Notes – (Optional) This is for informational purposes only to describe the purpose of the Collection Profile.

Default Template – (Optional) You can produce bulk Collection Letters for one, multiple, or all of the customers that are put into the Collection Queue for this Profile. If Template Letters have already been loaded to the template server, the

User may select the default letter that would most typically be used for this Collection Profile. A default template letter may be assigned to the Collection Profile at a later time if the templates have not yet been loaded to the template server.

For instructions on how to set template letters and upload them to the template server, click on the following link: Collection Letters Setup

Once all fields have been populated, click the Save button located at the lower right of the Collection Profile Setup form. The new Collection Profile will be displayed in the Collection Profile List. To create additional Collection Profiles, follow steps 2 and 3 above.