Refreshing Collection Queues

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Before working with a customer in one of the Collection Queues, the Queues should first be "Refreshed". This process is referred to as the Auto Process Refresh. This process should be run at the beginning of each day. This process uses the rules set up for each of the sequenced Collection Profiles to evaluate customer accounts to determine if they meet the rules to automatically be placed into one of the Collection Queues or will be moved to a different Collection Queue. Once this process has been completed Users will be able to work with the most up-to-date collection information.

If you would like the refresh process to be executed automatically every day at a particular time, contact support@sedonaoffice.com to have a support technician set up this process for your company.

Note: To make certain all customer accounts have been properly aged, your company should set up the Auto Age process on the SedonaOffice server. This process is typically set to run after midnight so that all customer accounts are freshly aged at the beginning of each workday. For assistance in setting up this process to run on your server, please contact our IT department at support@sedonaoffice.com.

1. To manually run the Auto Process Refresh, navigate to the Client Management module and select the Collections menu option.

2. The Collection Profile List will be displayed. click the Auto Process Refresh button located on the toolbar. A message box will be displayed confirming you are ready to run the process; click the Yes button to proceed.

Once the process has been completed, Customers will be placed in the appropriate sequenced Collection Queue depending on the past due amount on their account and the collection rule that was met to put the customer into collections.