Working in a Collection Queue

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1. Once the Auto Process Refresh has been completed the User will select the Collection Profile in which they will be working by double-clicking on a Collection Profile within the Collection Profile List.

2. The Collection Queue will be displayed. A Collection Queue is a listing of all customers that met the rules set for the Collection Profile. Sort the Collection Queue in the desired manner by clicking on the header title of any column within the queue. Typically the Collection Queue is sorted on the Amount Due column in descending order so that customers with the highest balances are addressed first.

3. For the first customer that will be worked with, review the amounts owed in the various aging columns. Pay particular attention to any amount displayed in the Credits column. The customer may have a large deposit on account for a job that is in process; this information may change the tone of the conversation with the customer.

4. Double-click on the customer collection row to open the Customer Explorer record. Here the User may review outstanding invoices to see what types of invoices have not been paid and the User may also review the customer's payment history. Instead of closing the Customer Explorer, it is often helpful to leave the record open while speaking to the customer. It is helpful to view the open windows in a Cascade fashion for easier navigation between the Collection Queue and the Customer Explorer record.

5. If contact is made with the customer the User may open a new Collection Event to record the outcome of the telephone conversation with the customer. If contact was not made with the customer a Manual Event should be created to document what action the Collector took i.e. left a message, etc. Click the Add Manual Event function button from the Collection Queue toolbar.

6. Once the Collection Activity form is displayed, enter a follow-up date if needed, select a Collection Activity from the drop-down list, and enter notes into the Notes field. click the Save button located at the lower right of the form when finished entering information.

Note: There is no need to enter your name and/or the date of your collection action; the software will automatically record the User name that entered the collection note along with the date and time the note was saved.

7. The User may then continue to work with another customer in the Collection Queue.