Collections

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If your company is using the Collections module and the customer is or has ever been in one of the collection queues, all Collection history will be displayed in the Active Pane.

Right-clicking on the Collections tree option will display two possible options will be displayed depending on whether the customer is currently in Collections.

If the customer is currently in Collections, the options displayed will be; Change Collection Status and Print Statement.

Change Collection Status

Selecting the Change Collection Status option will open the Manual Collection Activity form. Use this option if the customer's current collection status needs to be changed. The User may also enter a follow-up date, select a Collection Activity, and enter Notes; all of which are highly recommended. This option is only available for customers who are currently in one of the Collection Queues.

Print Statement

Selecting the Print Statement option will open the Printing Preferences form, where the User will specify what type of information will be printed on the statement. All open invoices, and unapplied credit memos (if printing credits are selected in the Statement options) created for this customer will print on the statement.

If the customer is not currently in Collections, the options displayed will be; Put in Collections and Print Statement.

Put in Collections

This option is only available if the customer is not currently in a Collection Queue.

Selecting the Put in Collections option will open a list of available Non-Sequenced Collection Queues in which the customer may be placed. Select the appropriate Collection Queue according to your company's internal policies and procedures. After the Collection Queue has been selected, the User will be presented with a confirmation message.

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Once the Yes button is clicked on the confirmation message, the Collection Activity form will be displayed where the User will select the Customer Collection Status, set a follow-up date if desired, and enter any notes.