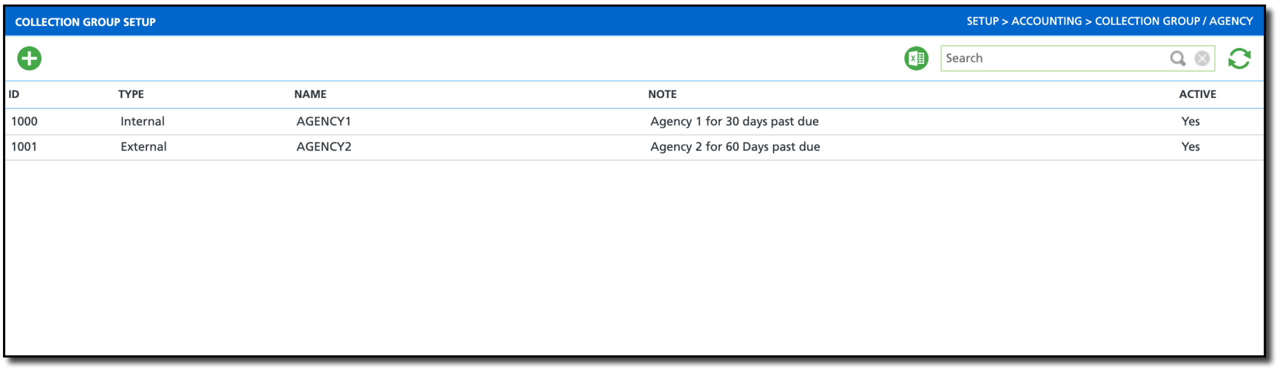
Collection Group/Agency Setup

Last Modified on 10/30/2024 2:00 pm PDT

Pathway: *Setup > Accounting > Collection Group/Agency*

The Collections Group Setup screen is used to create and manage the collection groups and agencies that can be assigned to accounts. This screen allows you to set up profiles for both internal and external groups or agencies responsible for collecting overdue debt from accounts.



Permissions

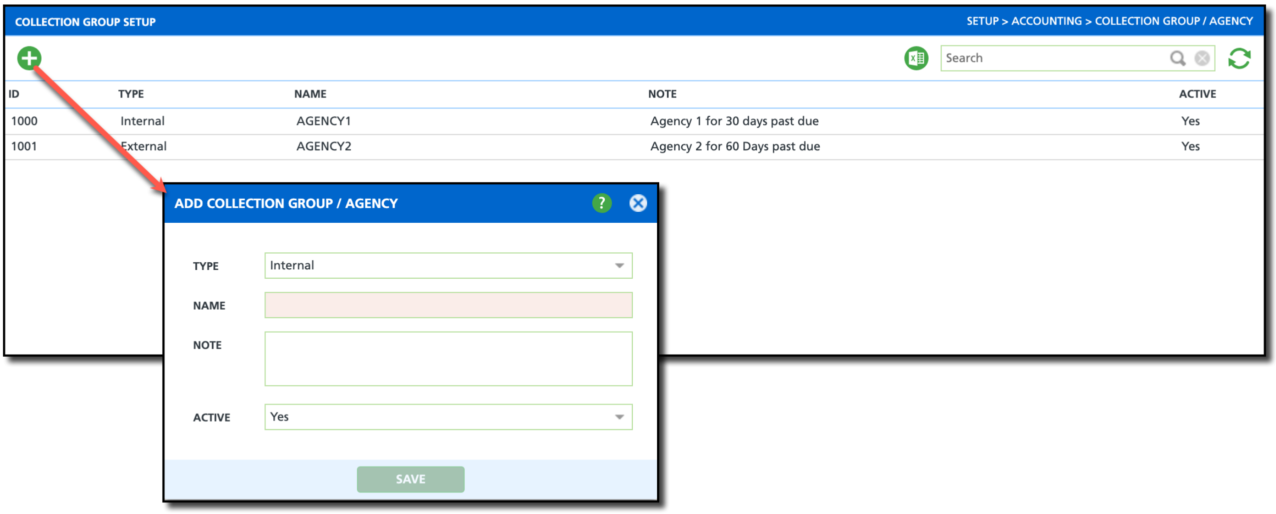
The following permissions are required to create collection groups and agencies:

Permission ID	Permission Name
22	Setup \ Accounting

Field Descriptions

Field	Description
ID	The collection group identification number.
Type	The type of collection group/agency: • Internal - The collection group/agency is an internal department within the company that handles collections. • External - The collection group/agency is an external company that will manage the collection process.
Name	Name of the collection group/agency.
Note	Optional notes regarding the collection group or agency.
Active	Determines if the collection group or agency is available for use.

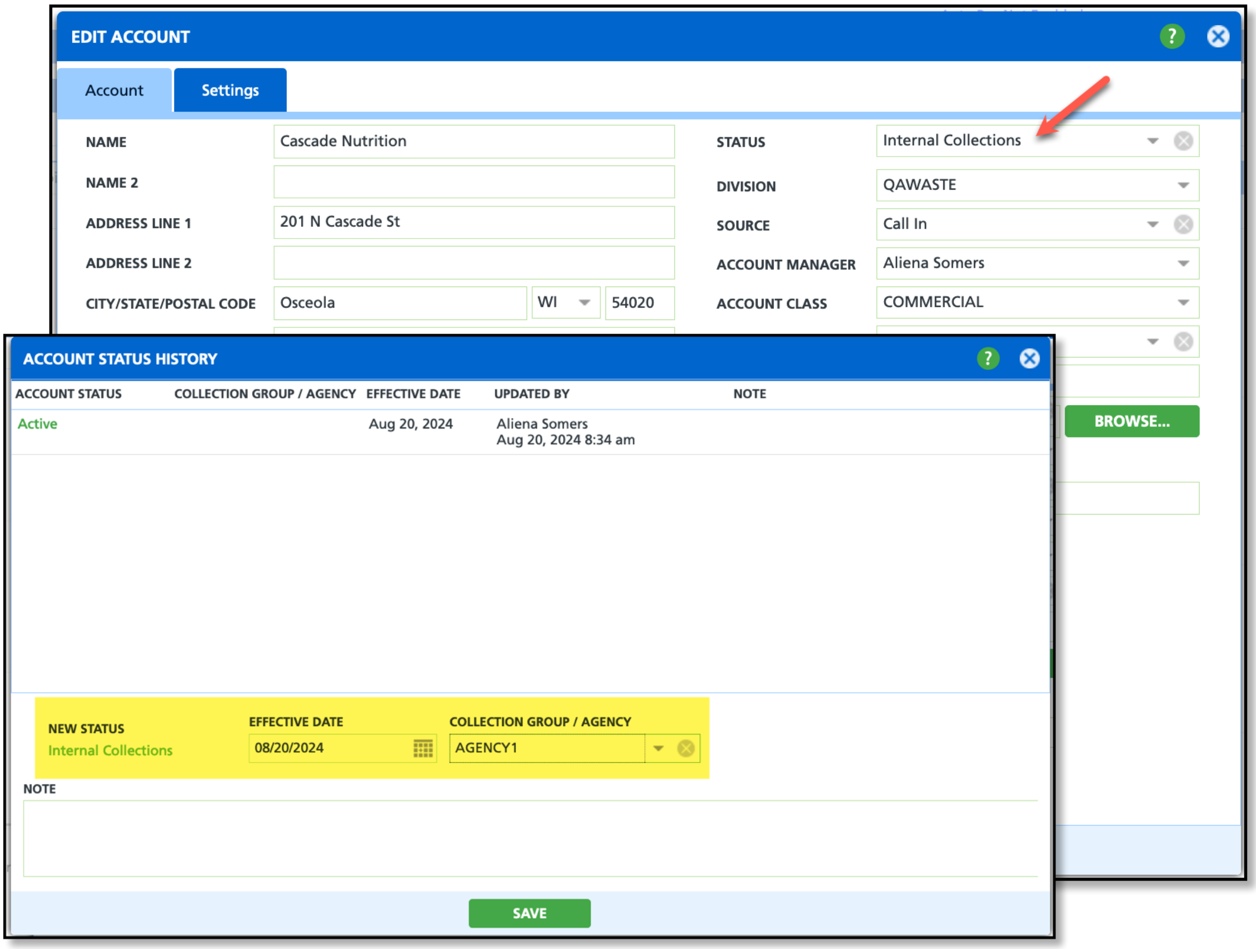
Add Collection Group/Agency



1. Click the '+' add icon to open the *Add Collection Group/Agency* screen.
2. Select a **Type** from the drop down to identify if the group/agency is internally or externally managed.
3. Enter a **Name** for the group/agency.
4. Optionally enter a **Note** to further identify the group/agency, or level of collection.
5. Select 'Yes' from the **Active** status drop down to make the group/agency available for use.

Assign a Collection Group/Agency as an Account Status

Once collection groups have been defined, they become available for selection in the Account Status History screen. To update an account status to Internal Collection or External Collections, there must be no active services associated with any of the account's sites.


EDIT ACCOUNT
Account
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STATUS
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Aliena Somers
ACCOUNT CLASS
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BROWSE...
ACCOUNT STATUS HISTORY
ACCOUNT STATUS
COLLECTION GROUP / AGENCY
EFFECTIVE DATE
UPDATED BY
NOTE
Active
Aug 20, 2024
Aliena Somers
Aug 20, 2024 8:34 am
NEW STATUS
Internal Collections
EFFECTIVE DATE
08/20/2024
COLLECTION GROUP / AGENCY
AGENCY1
NOTE
SAVE