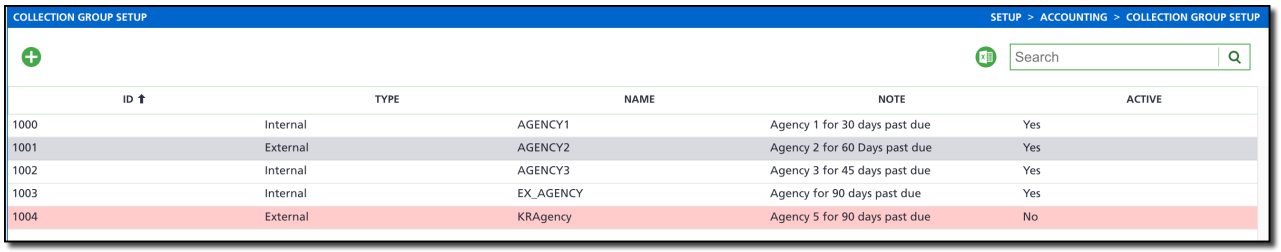
Collection Group/Agency Setup

Last Modified on 10/09/2026 1:14 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.

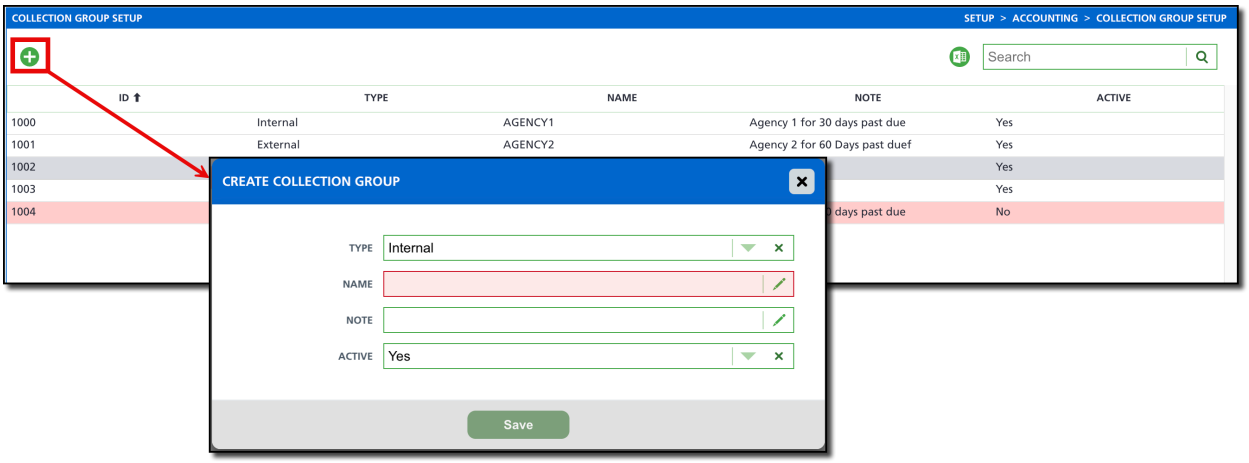


Field Descriptions

Field	Description
ID	Unique system identification number for the collection group/agency.
Type	The type of collection group/agency: • Internal - A collection group/agency within the company that handles collections. • External - A collection group/agency outside the company that will manage the collection process.
Name	Name of the collection group/agency.
Note	Optional notes regarding the collection group/agency usually descriptive as to how and when it used.
Active	Determines if the collection group or agency is available for use.

Add Collection Group/Agency

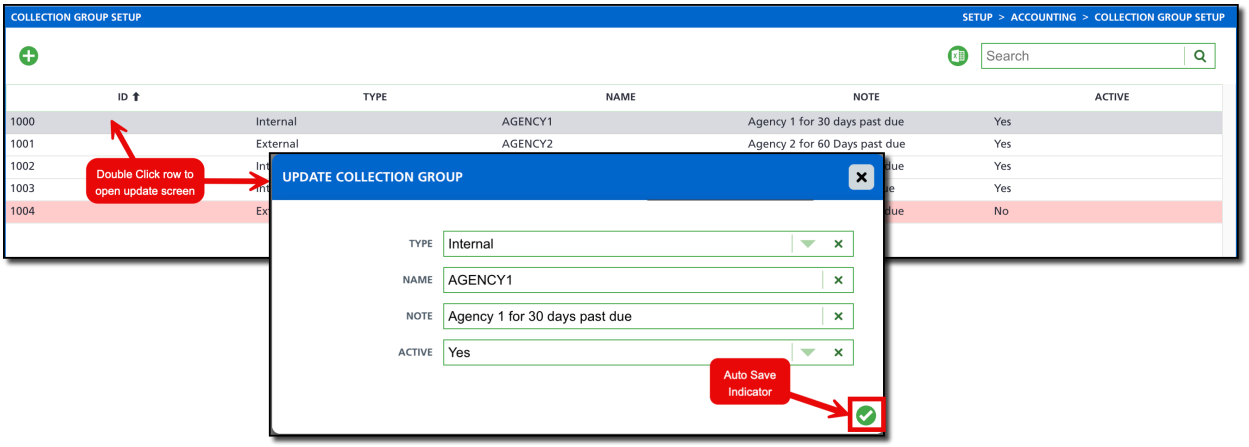
To add a new Collection Group or Agency, use the following steps. Once created and active, the Collection Group/Agency will be available for selection in drop-downs and filters within the system, including the Status Management screen.



1. Click the **green +** icon to open the *Add Collection Group* screen.
2. Select a **Type** from the drop down to identify if the group/agency is internally or externally managed. By default, the value is set to "Internal".
3. Enter a descriptive **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.
6. Click **Save**.

Edit a Collection Group/Agency

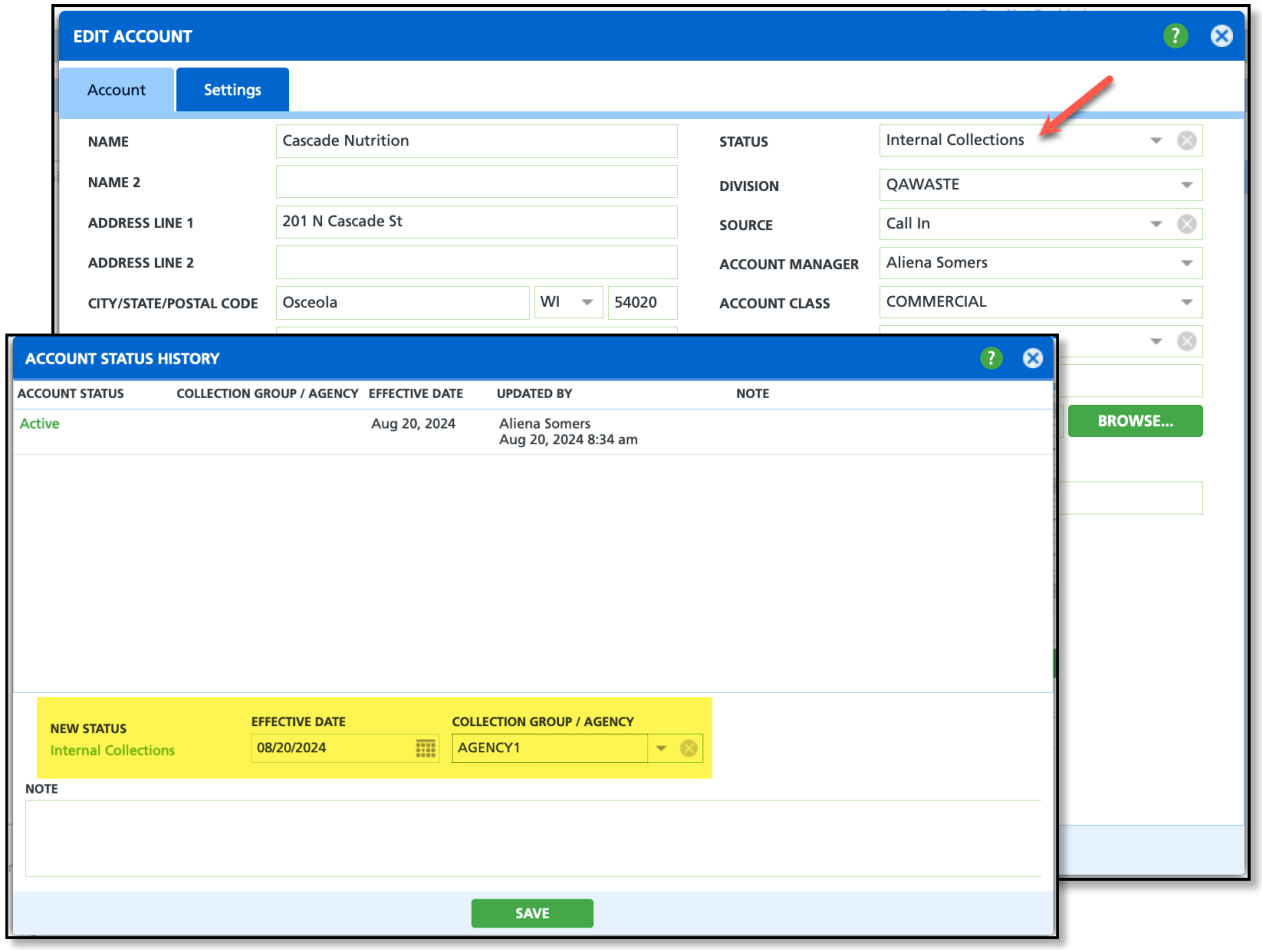
To edit an existing Collection Group or Agency or activate/deactivate it, use the following steps.



1. Double-click the row of the Collection Group/Agency to modify. This opens the *Update Collection Group* screen.
2. Use the drop-down, to change the **Type**.
3. Click in the text field, to update the **Name** or **Note**.
4. Click 'Yes' to **activate** or 'No' to **deactivate** the Collection Group/Agency.
5. Click outside a field to **auto save** changes.

Assign a Collection Group/Agency

Once a Collection Group or Agency is defined, it can be assigned via the **Account Status History** screen which is accessed via the Edit Account screen. **Note:** The system requires all active services across all sites to be closed or terminated before the account status can be updated to Internal or External Collections.



Permissions

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

Permission ID	Permission Name
22	Setup \ Accounting

Related Articles

Status Management [Collection Accounts]
Collection Type Setup