Collection Group/Agency Setup

Last Modified on 08/20/2024 11:24 am EDT

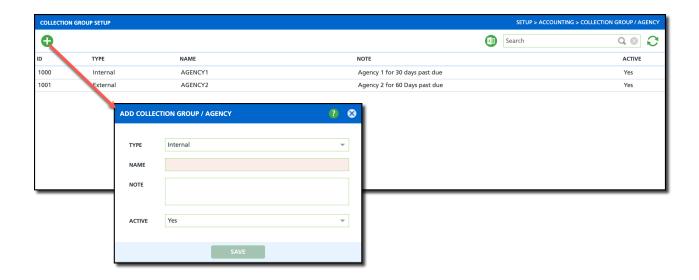**Pathway:** *Setup > Accounting > Collection Group/Agency*

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.

COLLECTION GROUP SETUP				SETUP > ACCOUNTING > COLLECTION GROUP / AGENCY
ID	**TYPE**	**NAME**	**NOTE**	**ACTIVE**
1000	Internal	AGENCY1	Agency 1 for 30 days past due	Yes
1001	External	AGENCY2	Agency 2 for 60 Days past due	Yes

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

ID	TYPE	NAME	NOTE	ACTIVE
1000	Internal	AGENCY1	Agency 1 for 30 days past due	Yes
1001	External	AGENCY2	Agency 2 for 60 Days past due	Yes

ADD COLLECTION GROUP / AGENCY

TYPE	Internal
NAME	
NOTE	
ACTIVE	Yes

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Add Collection Group/Agency Steps

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.

Assigning Collection Group/Agency to 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	Settings

NAME	Cascade Nutrition		STATUS	Internal Collections ▼ ⊗
NAME 2			DIVISION	QAWASTE ▼
ADDRESS LINE 1	201 N Cascade St		SOURCE	Call In ▼ ⊗
ADDRESS LINE 2			ACCOUNT MANAGER	Aliena Somers ▼
CITY/STATE/POSTAL CODE	Osceola	WI ▼	54020	ACCOUNT CLASS	COMMERCIAL ▼

▼ ⊗

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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	EFFECTIVE DATE	COLLECTION GROUP / AGENCY
Internal Collections	08/20/2024 ▦	AGENCY1 ▼ ⊗

NOTE

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