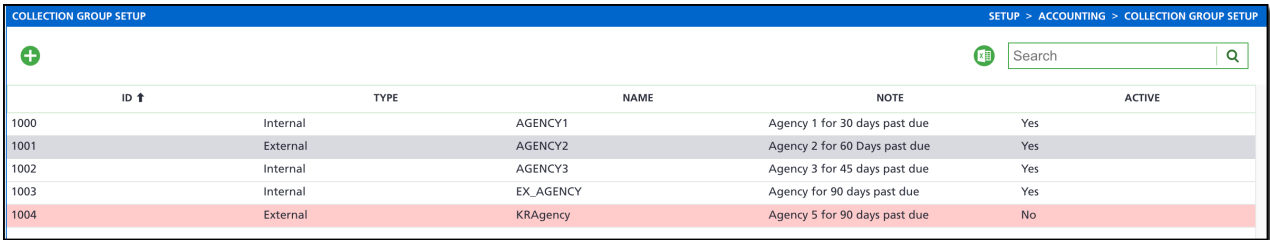


Collection Group/Agency Setup

Last Modified on 04/24/2026 1:19 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.



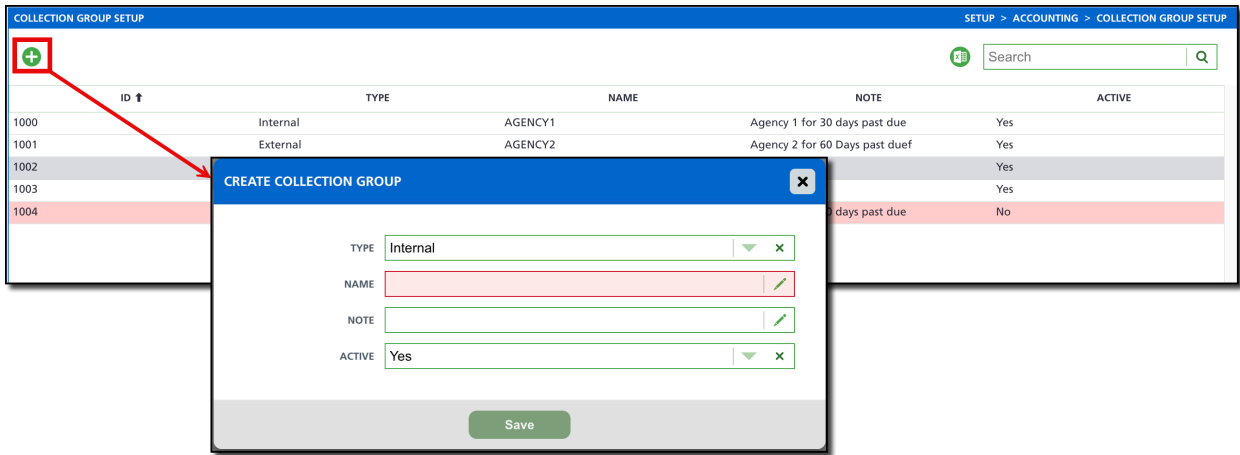
ID	TYPE	NAME	NOTE	ACTIVE
1000	Internal	AGENCY1	Agency 1 for 30 days past due	Yes
1001	External	AGENCY2	Agency 2 for 60 Days past due	Yes
1002	Internal	AGENCY3	Agency 3 for 45 days past due	Yes
1003	Internal	EX_AGENCY	Agency for 90 days past due	Yes
1004	External	KRAgency	Agency 5 for 90 days past due	No

Field Descriptions

Field	Description
ID	Unique system identification number for the collection group/agency.
Type	The type of collection group/agency: <ul style="list-style-type: none">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 is used.
Active	Determines if the collection group or agency is available for use.

Add Collection Group/Agency

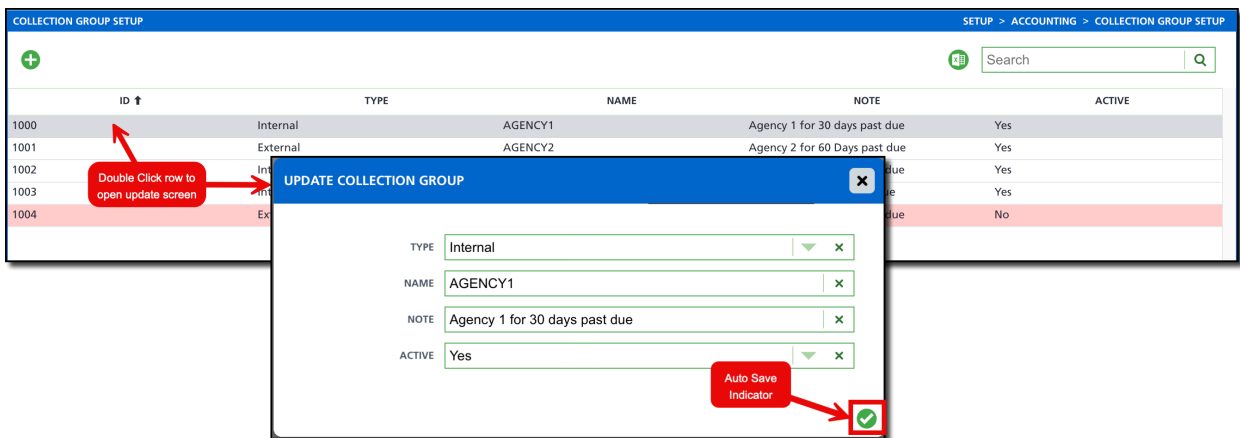
To add a new Collection Group or Agency, use the following steps. Once created and active, the Collection Group/Agency will be available for selection in drop-downs and filters within the system, including the [Status Management](#) screen.



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.

EDIT ACCOUNT
?
✕

Account

Settings

NAME

NAME 2

ADDRESS LINE 1

ADDRESS LINE 2

CITY/STATE/POSTAL CODE

STATUS

DIVISION

SOURCE

ACCOUNT MANAGER

ACCOUNT CLASS

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

NOTE

SAVE

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](#)