

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.

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

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: <ul style="list-style-type: none">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

The screenshot displays the 'COLLECTION GROUP SETUP' interface. At the top, there is a breadcrumb trail: 'SETUP > ACCOUNTING > COLLECTION GROUP / AGENCY'. A search bar is located in the top right corner. The main area contains a table with the following data:

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

An 'ADD COLLECTION GROUP / AGENCY' modal form is overlaid on the table. It contains the following fields:

- TYPE: A dropdown menu with 'Internal' selected.
- NAME: A text input field.
- NOTE: A text area.
- ACTIVE: A dropdown menu with 'Yes' selected.

A 'SAVE' button is located at the bottom of the modal. A red arrow points from the '+' icon in the top left of the main screen to the modal form.

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 ? X

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

ACCOUNT STATUS HISTORY ? X

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

BROWSE...