

Collection Type Setup

Last Modified on 04/13/2026 7:35 am PDT

Pathway: [Setup](#) > [Accounting](#) > [Collection Type](#)

The **Collections Type Setup** screen is used to set up and manage the collection types that can be assigned to accounts. A Collection Type is a classification code used to categorize accounts that are no longer in good standing and are typically used to differentiate between levels of delinquency.

The **Collection Group/Agency** is the entity assigned to handle the debt while the **Collection Type** defines the **nature or stage** of the collection process.

ID ↑	NAME	ACTIVE
1000	QALLC1	Yes
1001	QALLC2 - Collection Type 2 - Internal	Yes
1002	QALLC3	Yes
1003	QALLC4	No

Permissions

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

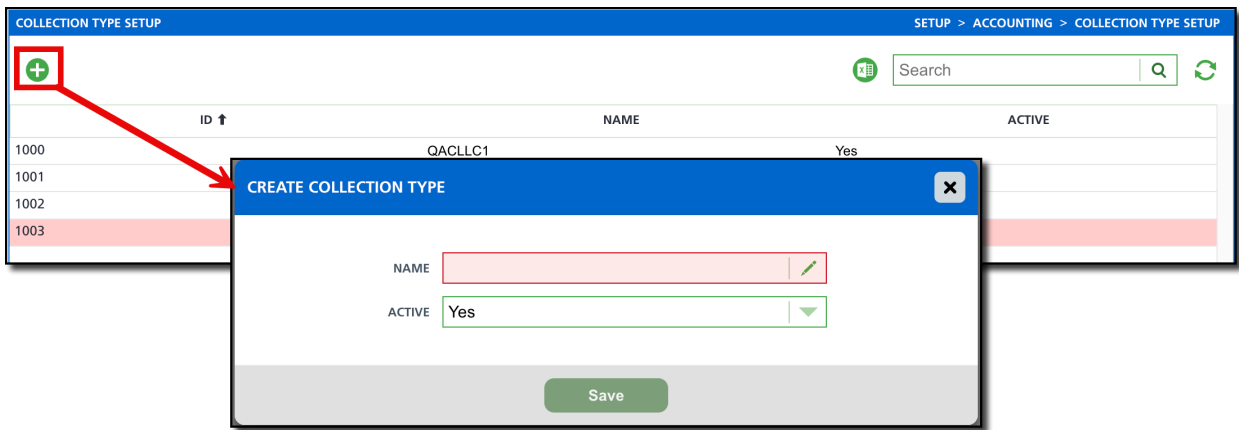
Permission ID	Permission Name
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Field Descriptions

Field	Description
ID	Unique system identification number for the collection type.
Name	Name of the collection group/agency.
Active	Determines if the collection group or agency is available for use.

Add Collection Type

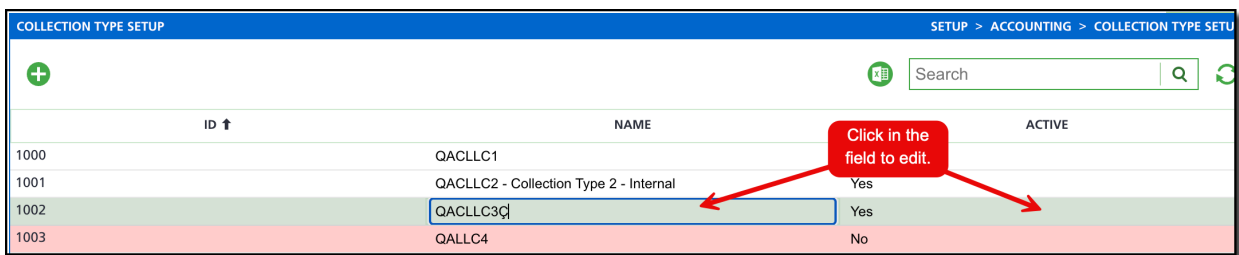
To add a new Collection Type, use the following steps. Once created and active, the Collection Type will be available for selection in drop-downs and filters within the system, such as the [Status Management](#) and the [AR Aging Management](#) screens.



1. Click the green '+' add icon to open the *Create Collection Type* screen.
2. Enter a descriptive **Name** for the group/agency.
3. Select 'Yes' from the **Active** status drop down to make the group/agency available for use.
4. Click **Save**.

Edit a CollectionType

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



1. Click in the text field, to update the **Name**.
2. Click in the Active field, and select 'Yes' to **activate** or 'No' to **deactivate** from the dropdown.
3. Click outside a field to **auto save** changes.

Assign a Collection Group/Agency

Once a collection type is defined, it can be assigned via the **Add/Edit Account** screen which is accessed via the **Edit Account** screen. **Note:** The system requires all active services across all sites to be ended before the account status can be updated to Internal or External Collections. In addition, a collection type cannot be selected for active accounts.

EDIT ACCOUNT ? ✕

Account **Settings**

NAME	<input type="text" value="Example Account 1"/>	STATUS	<input type="text" value="Credit Hold"/>
NAME 2	<input type="text"/>	DIVISION	<input type="text" value="QAWASTE"/>
ADDRESS LINE 1	<input type="text" value="1234 W Valley Blvd"/>	SOURCE	<input type="text" value="Call In"/>
ADDRESS LINE 2	<input type="text"/>	ACCOUNT MANAGER	<input type="text" value="House Account - House Account (Sales)"/>
CITY/STATE/POSTAL CODE	<input type="text" value="San Gabriel"/> <input type="text" value="CA"/> <input type="text" value="91776-3"/>	ACCOUNT CLASS	<input type="text" value="COMMERCIAL"/>
PHONE	<input type="text" value="(201) 555-0123"/>	AUDITOR	<input type="text"/>
ATTN	<input type="text"/>	COLLECTION TYPE	<input type="text"/>
BILLING PHONE	<input type="text" value="(201) 555-0123"/>	WEBSITE	<input type="text"/>
FAX	<input type="text" value="(201) 555-0123"/>	LOGO	<input type="text" value="Select logo..."/> <input type="button" value="BROWSE..."/>
BILLING CONTACT 1	<input type="text"/>	UPLOADED LOGO	<input type="text"/>
BILLING CONTACT 2	<input type="text"/>	OLD ID	<input type="text"/>
PARENT ACCOUNT	<input type="text"/>	ERP ID	<input type="text"/>

Related Articles

- [Status Management \[Collection Accounts\]](#)
- [Collection Group/Agency Setup](#)