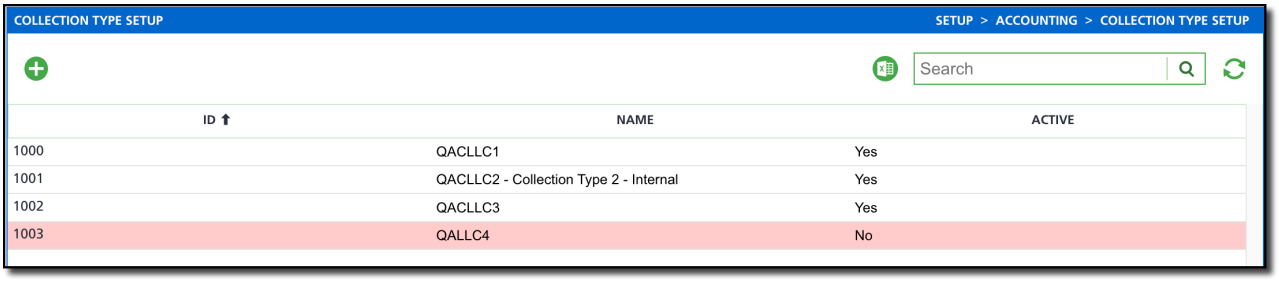
Collection Type Setup

Last Modified on 10/09/2026 1:15 pm 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.



Permissions

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

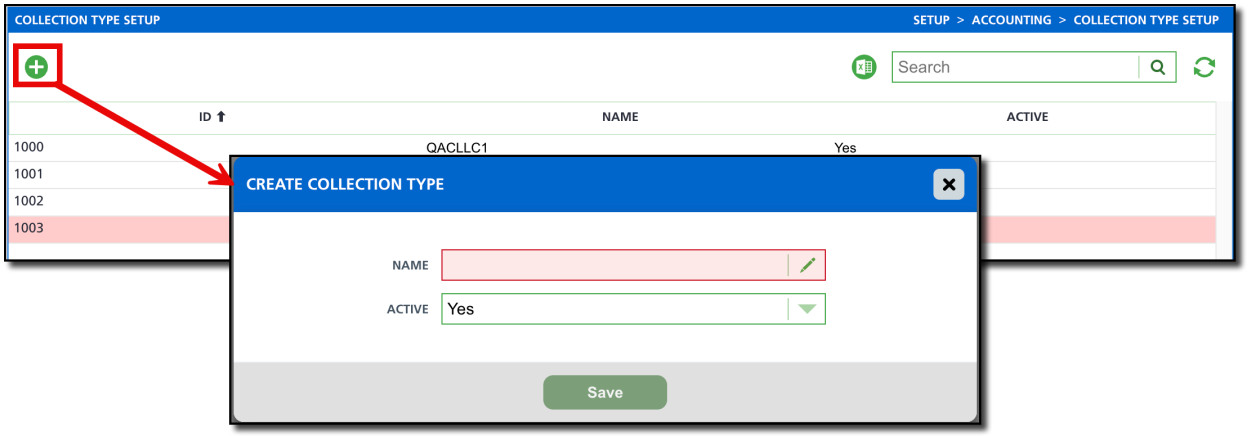
Permission ID	Permission Name
22	Setup \ Accounting

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

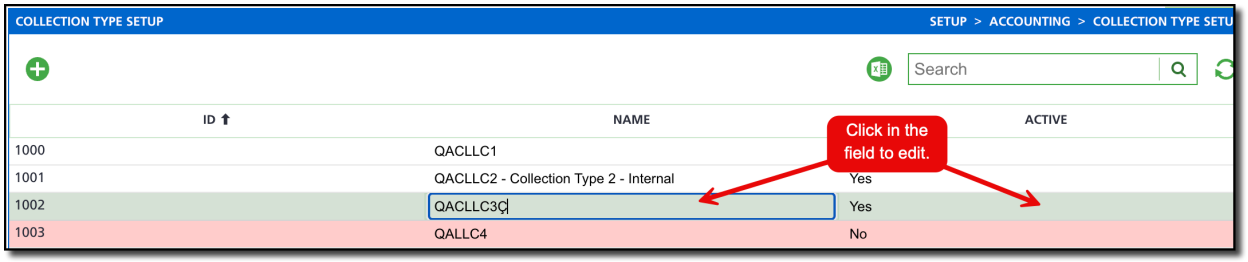
To add a new Collection Type, use the following steps. Once created and active, the Collection Type will be available for selection in drop-downs and filters within the system, such as the Status Management and the AR Aging Management screens.



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

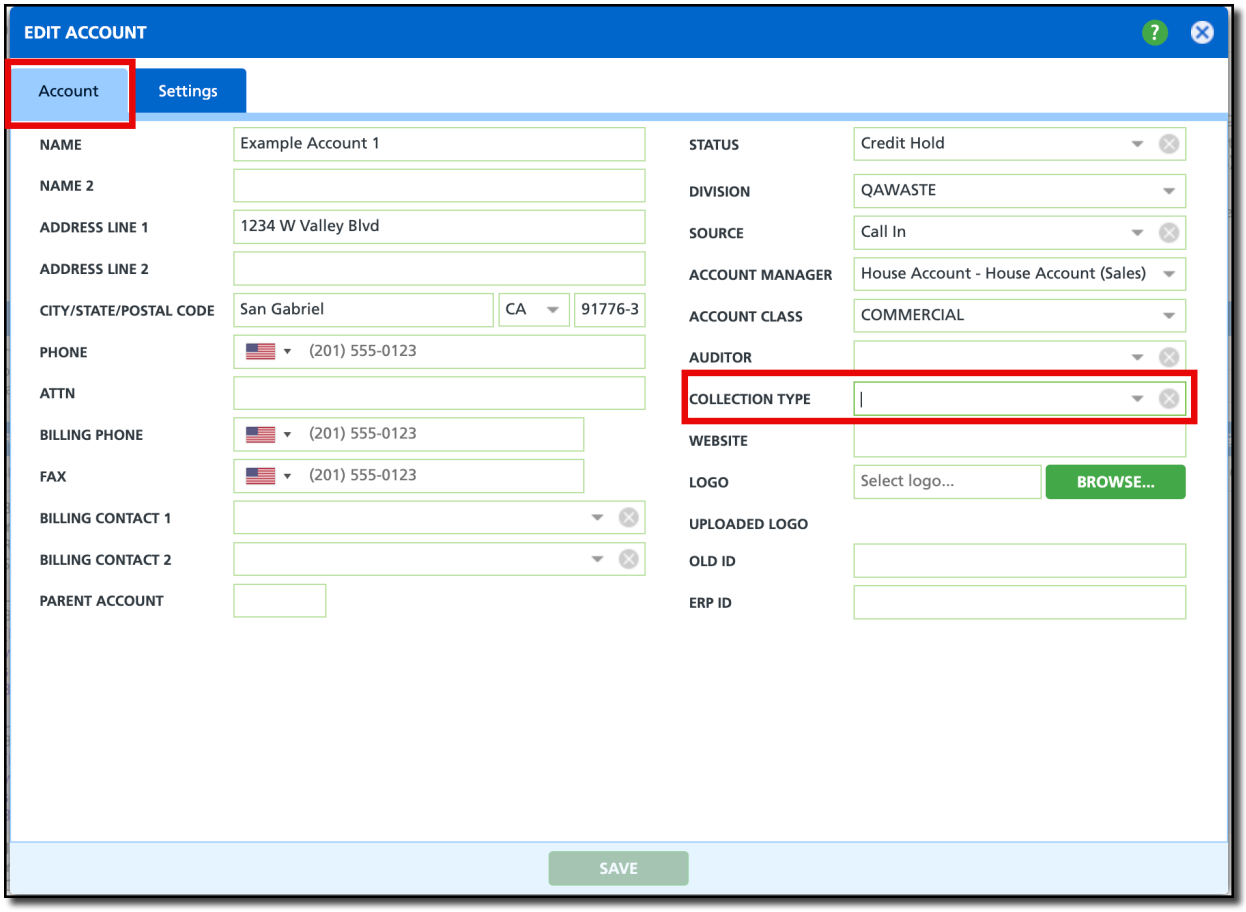
To edit an existing Collection Type or activate/deactivate it, use the following steps.



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.



Related Articles

Status Management [Collection Accounts]
Collection Group/Agency Setup