

How to Correct Customers in the Wrong Collection Queue in SedonaOffice

05/31/2024 8:44 am EDT

Customers appear in the wrong queue. Customers not meant to be in Collections appearing in Collection Queues

Description of Issue:

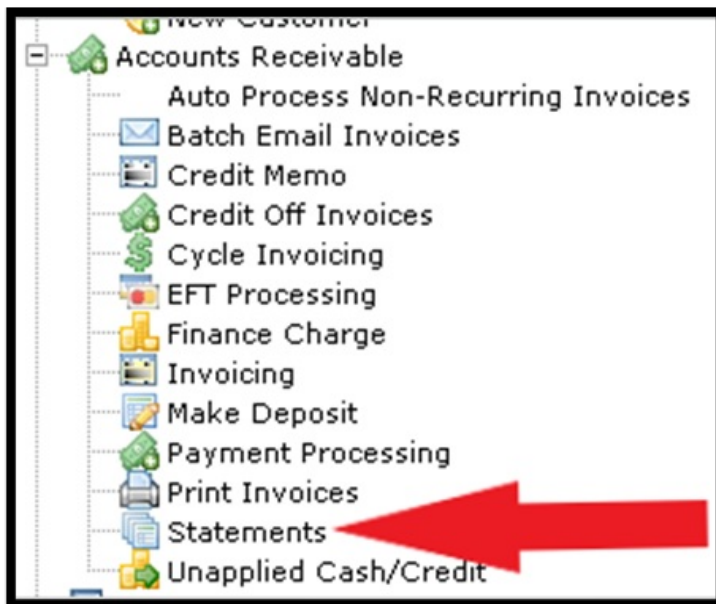
We are seeing some strange things in our collection queue, there are accounts that do not owe anything that are showing up in the different collection queues and there are accounts that should be there that are not.

Customers may be experiencing issues with collection queue, where they are seeing customers in the incorrect queue or customers that should not be appearing in the collection queues at all are showing up in the collection queues.

Resolution:

Go to Accounts Receivable

Right click on Statements



After right clicking on Statements, you will see a light blue banner with white wording in the center that states "Aging All Customers."



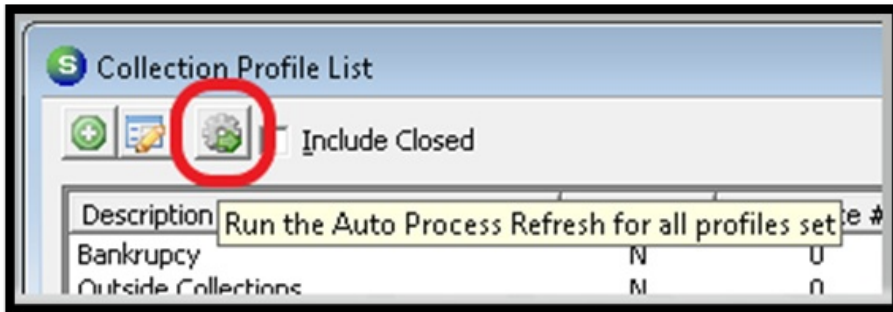
After the aging is done, the Statements window will pop-up. Close it.

Go to Client Management

Open Collections



Once the Collection Profile List is open, click on the button to Run the Auto Process Refresh for all profiles set



In most cases, aging all customers and then refreshing the collection profiles does resolve this issue. If it does not, please let us know.