

Removing a Customer from Collections

04/29/2024 10:47 am EDT

If for some reason a User has a need to remove a customer from the Collections Queues, the steps below will go over two different ways of accomplishing the removal.

Overview

The method of removing a customer from collections differs depending upon if the customer is in a Sequenced or Non-Sequenced Collection Queue. Both methods will be described below.

Removing a customer from a Sequenced Collection Queue

1. To remove a customer from collections that is currently in a sequenced collection queue, you must first move the customer into a non-sequenced queue. Only customers in non-sequenced queues may be manually removed from collections.


2. Enter a new Non-Sequenced Collection queue using 99999999 and 99999999 days past due, can pick whatever for the letter type. Do not click on Auto Sequencing check box. Click Save when done.


3. Open the Collection Queue in which the customer is located. Highlight the customer collection record in the list.


4. Click the Move to another Collection Queue button from the Collection Queue function buttons toolbar.



5. The Available Collection Queues list will be displayed. Double-click on the Collection Queue into which the customer will be moved. A message will be displayed confirming the move; click the Yes button to proceed.



6. Now open the Collection Queue into which the customer was moved in the previous step. Highlight the customer

to be removed from collections; right-click and select the Remove Customer from Collections option. The customer has now been removed from collections.

□

Removing a customer from Non-Sequenced Collection Queue

1. To remove a customer from collections that is currently in a non-sequenced collection queue, follow the steps below.

2. Open the Collection Queue in which the customer is located.

□

3. Highlight the customer to be removed from collections; right-click and select the Remove Customer from Collections option. The customer has now been removed from collections.

□



Note: The next time the Collection Queues are refreshed, if the customer manually removed from collections still meets the rules of any of the Collection Profiles, the customer will be placed back into the appropriate Collection Queue.