Collections

Introduction

The Collections page is where posted invoices appear and are ready to be charged if a customer has a credit card on their account but do not have autopay set up. To reach the invoice page, click on the Billing dropdown then click on Collections. Clicking on the 3 lines on the top left of the page will expand the side menu for easier access.

Collections

The collections page is where customers who have credit cards on file can be charged after an invoice has been posted. If a customer has autopay set up, then the customers account will be charged automatically after the invoice has been posted. If a customer does not have a card on file, then the customer needs to be charged on the Bank Deposits page. For more information see the Bank Deposits and Receipts guide for charging an account with no card on file. When arriving on collections, the page will first display the following information

- Reminders Completed - Shows the total number of collections that have been completed
- Reminders Due - Shows the total number of collections that are due
- Reminders Upcoming - Shows collections who's due dates are approaching
- Unpaid - Shows the total amount that's owed and needs to be collected

The page can then be filtered by the type of invoice that was generated if looking for a specific invoice to charge. After selecting a filter, the page will then display as a table with all invoices being line items and with the following columns

- Account - Shows the Customer's Account Number, clicking here will bring up the customers account page
- Name - The name of the account holder
- Address - The account holders Address
- Due - The due date of the invoice
- Type - The type of invoice/service
- Amount - The amount due for that invoice
- Last Update - The last time the invoice was updated
- Credit Hold - Shows if the customer has a credit hold on their account
- Actions - Clicking on Charge will charge the customers card on file for the amount due

Clicking on each column header will sort the table by the selected header and display accordingly.

A more in depth look at each individuals collection invoice can be seen on the Recent Transactions page on the customers account if an invoice needs to be seen at a closer level for more information

Revision #4
Created 22 January 2026 19:47:12 by Kozy Operations
Updated 26 January 2026 14:45:19 by Kozy Operations