# Collections

*Accounts receivable > Common > Collections > Collections*

## Summary

The Collections module is a dashboard view of many different functions, including Accounts receivable Cases, Activities, write-offs, and reports.

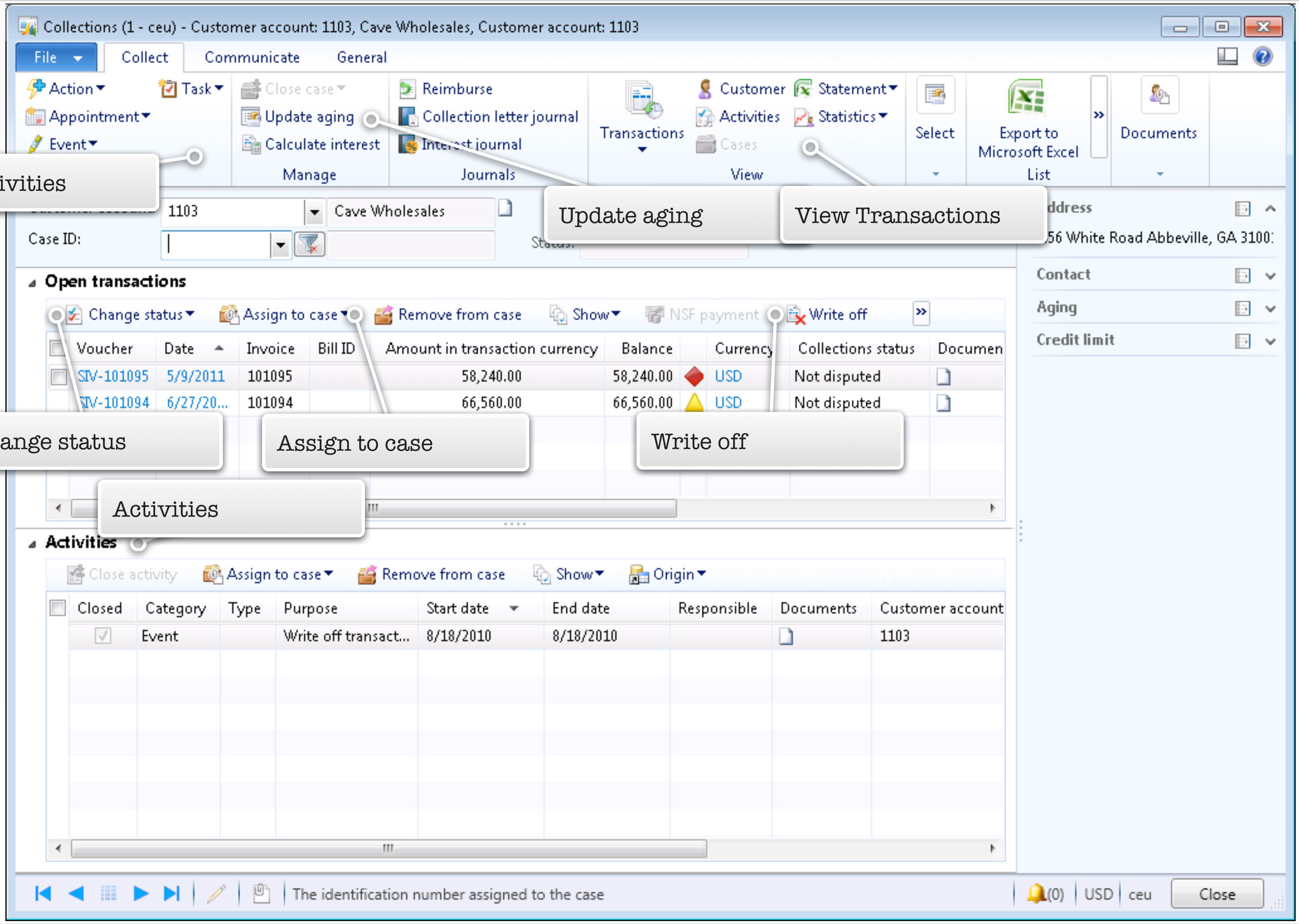
## Steps

1. Create a Collection case
2. Create activities
3. Modify Collection status
4. Write off an invoice

## Tips

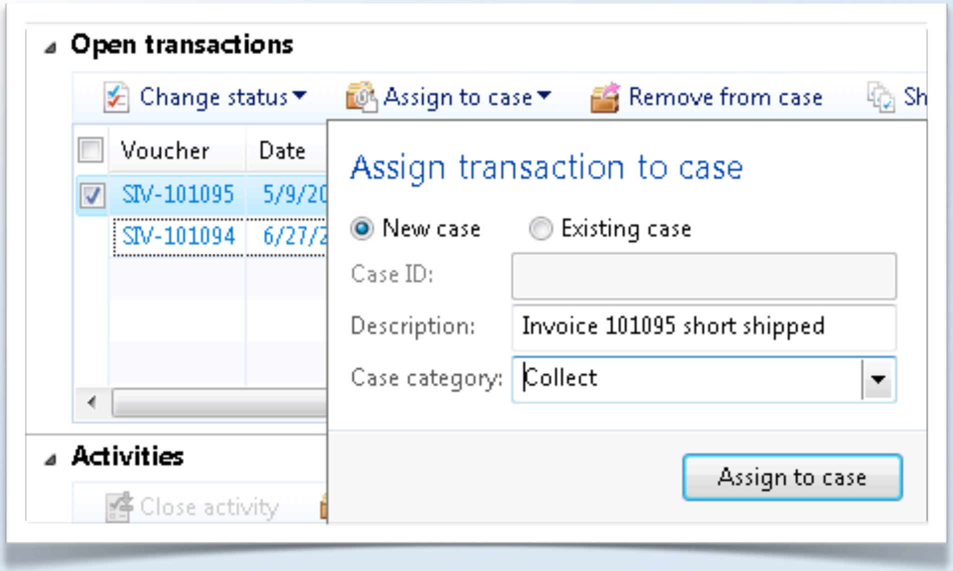
- Use Cases when specific invoices are in dispute
- The Write off function creates an unposted General journal
- The Collections module is not wrapped around a specific business process; the process needs to be determined first then tied to the forms

# **Interactive 3.5** Collections



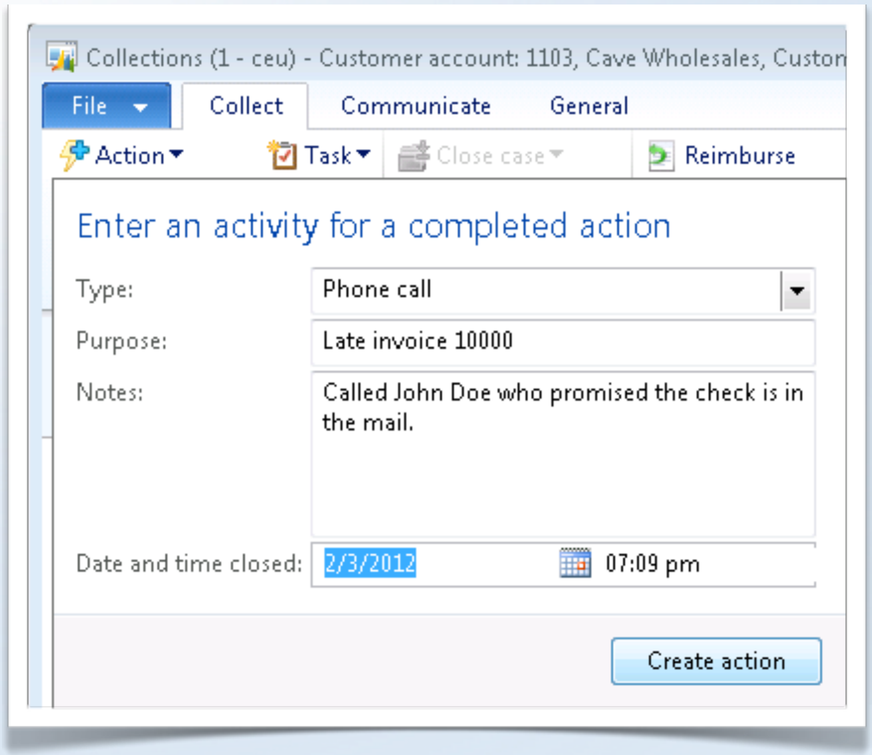
# Create a Collection case

- Select invoices and click **Assign to case**.
- Type a **Description** and choose a **Case category**.
- Click the **Assign to case button**.



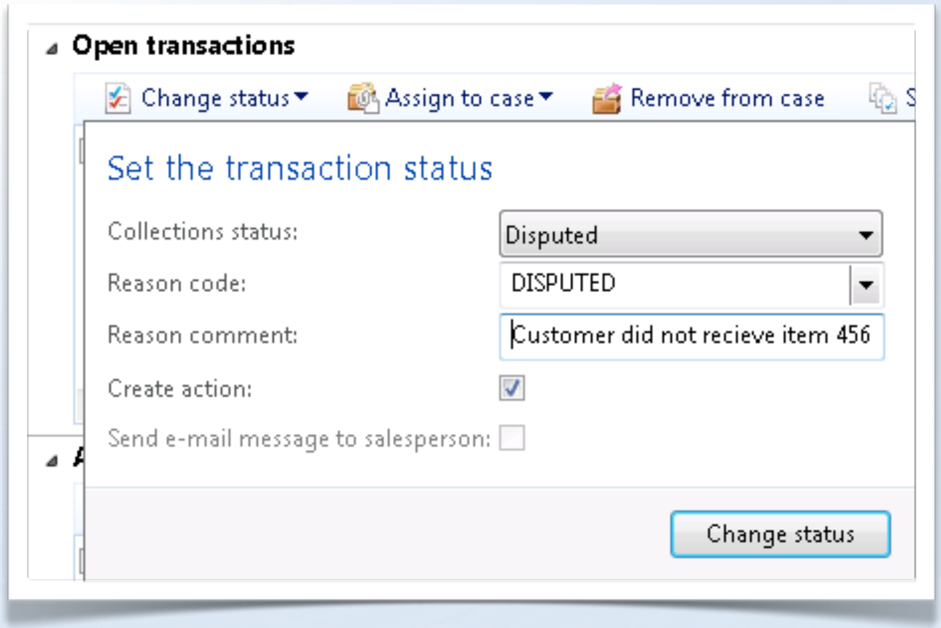
# Create activities

- Click the new **Action button**.
- Select the **Type** of action.
- Type a **Purpose** as the short Activity description.
- Add **Notes**.
- Click the **Create action button**.



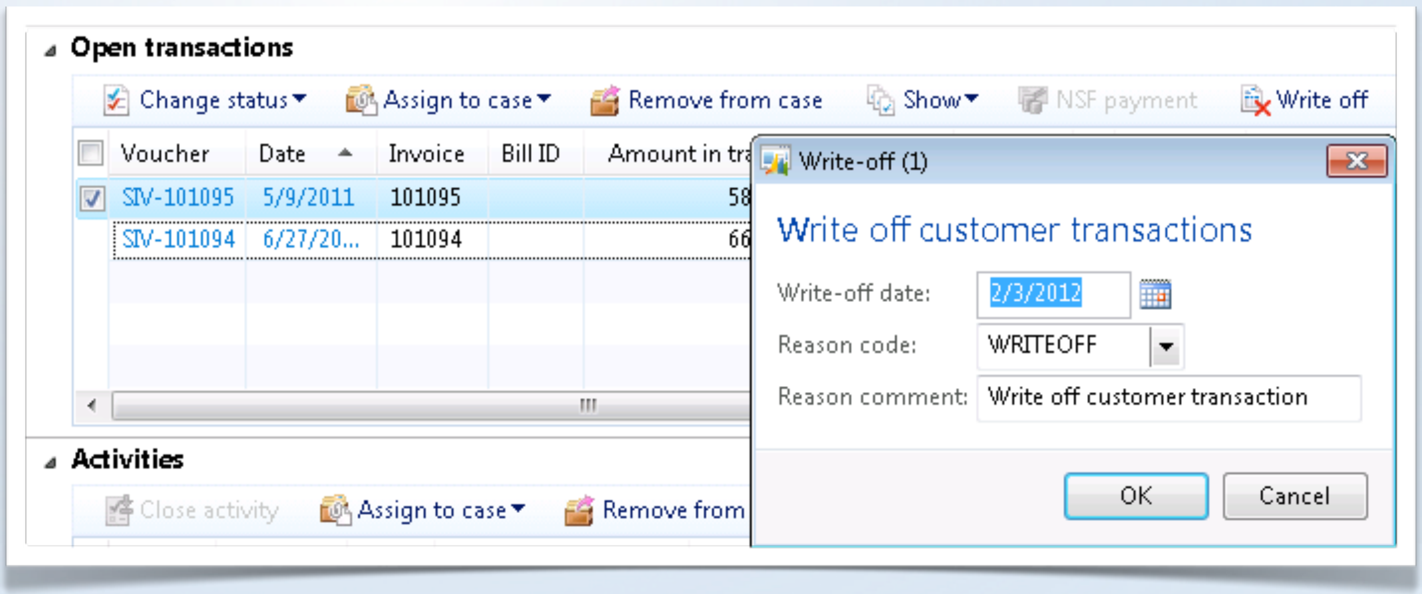
# Modify Collection status

- Click the **Change status button**.
- Choose the **Collections status**.
- Select a **Reason code** and a **Reason comment**.
- Select **Create action** to also create an Activity.
- Click the **Change status button**.



# Write off an invoice

- Mark invoices and click the **Write off button**.
- Post the write-off on the **Write-off date**.
- Choose a **Reason code**.
- Type a **Reason comment.**
- Click **OK**.



**Movie 3.5** Collections