

# USER GUIDE

## Collections



**entrata**

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# Collections

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## Setting Up Collections

- **Go to:** Entrada >> Setup >> Properties >> [select a property] >> Residents >> Move-out >> Collections
- This is information about necessary prerequisites. It will sometimes contain a [link to other sections or guides](#).

1. Click [Edit Collection Setting](#).
2. Enter the threshold amount in the **Send To Collections Threshold Amount** textbox. The resident must owe at least this amount in order to be sent to collections.
3. Enter the number of days before a financial move-out that you want to send the resident to collections, and when you want to send out pre-collection letters in the **Number of Days** textboxes.
4. Toggle **Yes** if you want to **Send Pre-Collections Notifications Automatically**, **Send to Collections Automatically**, and/or **Enable Collections Notification Emails to Residents**.
5. Click [Save](#).

## Setting Up Pre-Collection Letters

- **Go to:** Entrada >> Setup >> Company >> Residents >> Notifications

To create your own collection letters to send either as a first pre-collection letter, second pre-collection letter, final pre-collection letter, collection notice, or collection email, do the following.

1. Select the sidetab that you would like to create your own document for (either a custom First Pre-Collection Letter, Second Pre-Collection Letter, Final Pre-Collection Letter, etc.).
2. Click [Add Notice](#).
3. Name the document, decide whether it is usable or not by indicating if it is published or not, and select one or more properties that are associated with the collection letter (that is, one or more properties that can use the collection letter).
4. Click [Save](#).

## Editing Notice Content

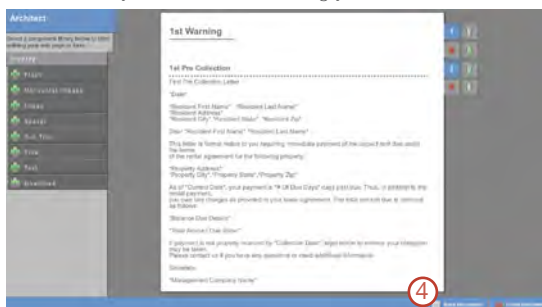
- **Go to:** Entrada >> Setup >> Company >> Residents >> Notifications

You can edit the content of your pre-collection letters, collection notice and collection email.

1. Select the sidetab of the document you would like to edit. (either a custom First Pre-Collection Letter, Second Pre-Collection Letter, Final Pre-Collection Letter, etc.).
2. Click [Edit Content](#) from the **Actions** drop-down menu inline with the document name.



3. The Architect window opens and you can make any necessary edits from this window.
4. Click [Save Document](#) when you are finished making your edits.



**i** Any residents who have had their FMO processed before you complete these settings will have to be sent to collections manually.

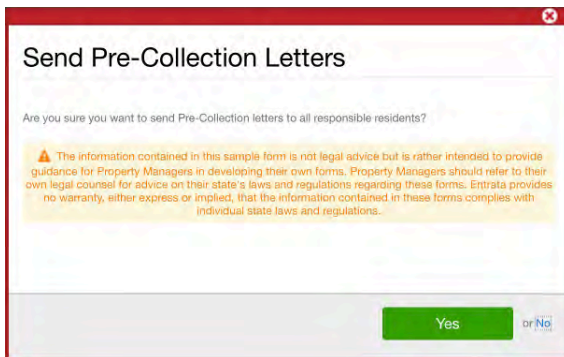
**i** Click [Preview](#) from the **Actions** drop-down menu to see a preview of the document.

**➔** For more information about editing in the Architect window, see the [Architect User Guide](#).

## Sending Pre-Collection Letters

- Go to: Entrata >> Dashboard >> My Dashboard >> Financial >> Collections
- A resident's financial move-out must be completed before you can send them pre-collection letters. See [Performing an FMO](#).

1. Send multiple residents pre-collection letters by selecting the checkbox inline with each resident's name and click [Generate Pre-Collection Letters](#).
2. Send a single resident to collections by selecting [Generate Pre-Collection Letters](#) from the **Options** drop-down menu inline with the resident's name.
3. Choose whether you want to send the **First Pre-Collection Letter**, the **Second Pre-Collection Letter**, and/or the **Final Pre-Collection Letter** from the drop-down menu in the top right corner of the Send Pre-Collection Letters window.
4. Click [Send Pre-Collection Letters](#).
5. Click [Yes](#) in the confirmation window to confirm that you want to send the pre-collection letters.



 You can also send a resident pre-collection letters by selecting [Send Pre-Collection Letter](#) from the **More Actions** drop-down menu in the resident's profile.

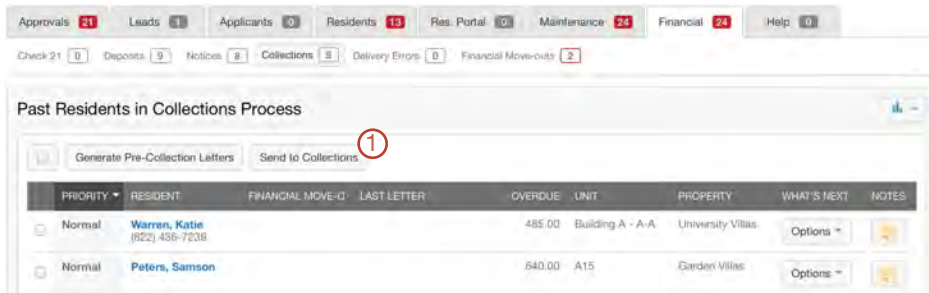
 You can also send a resident pre-collection letters by selecting [Send Pre-Collection Letter](#) from the **More Actions** drop-down menu in the resident's profile.

## Sending a Resident to Collections

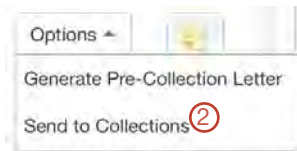
- Go to: Entrata >> Dashboard >> My Dashboard >> Financial >> Collections
- A resident's financial move-out must be completed before they can be sent to collections. See [Performing an FMO](#).

You can send one or more residents to collections from the Dashboard.

1. Send multiple residents to collections by selecting the checkbox inline with each resident's name and clicking [Send to Collections](#).



2. Send a single resident to collections by selecting [Send to Collections](#) from the **Options** drop-down menu inline with the resident's name.



3. Click [Yes](#) in the confirmation window to confirm that you want to send the resident to collections.

## Removing a Resident from Collections

- Go to: Entrata >> Residents >> All Residents >> [select a resident]

1. Select [Remove From Collections](#) from the **More Actions** drop-down menu.
2. Click [Yes](#) to confirm that you want to remove the resident from collections.

The resident is removed from collections and the resident's status is changed from Past – In Collections.

## Excluding a Resident from Collections

- Go to: Entrata >> Residents >> All Residents >> [select a resident]

1. Select [Exclude From Collections](#) from the **More Actions** drop-down menu.
2. Enter an explanation for why you are excluding this resident from collections in the textbox, and click [Submit](#).

The resident's status is changed to Excluded From Collections.

## Resuming the Collections Process for a Resident

- Go to: Entrata >> Residents >> All Residents >> [select a resident]

1. Select [Resume Collections](#) from the **More Actions** drop-down menu.
2. Click [Yes](#) to confirm that you want to resume collections for this resident.

**i** The Dashboard does not filter out leases that have not had the FMO completed. If you try to send a lease to collections without first completing the FMO, you will get a warning that the lease cannot be sent to collections.

**i** You can also send a resident to collections by selecting [Send To Collections](#) from the **More Actions** drop-down menu in the resident's profile.

**i** If you would like to add a note, click the icon in the **Notes** column. A window appears in which you can enter the note.

**i** Clicking the name of a resident in the Resident column opens the **Activity Log** of the resident profile.

**i** You can search for the resident using the search filters on the left side of the All Residents screen.

## Setting Up a Collections Vendor in the App Store

You must first purchase a Collections Vendor and then you can assign it to your properties.

### Purchasing a Collections Vendor in the App Store

- Go to: [Entrata >> Apps >> App Store >> 3rd-Party Apps](#)

1. Select [Add to Property](#) under the Collections app title you would like to purchase.

- a. If you want to see details about the app, click [Add Details](#).
- b. A new curtain opens displaying information about the app.
- c. Click [Add to Property](#) to add the app from this window.

2. The selected app will populate in the far right frame, under [Manage Apps](#).

3. Click [Manage Apps](#) to purchase the selected apps.

4. On the Manage 3rd Party Apps page, specify which properties (or all properties) you would like to purchase this app for.

5. Click [Submit](#) to purchase the selected apps.

6. Each third-party app will have a Terms of Use. Select [Allow Access](#) to let the app use the data it needs to function.

7. Click [Finish](#) to finalize purchasing the app.

8. A confirmation page will display, itemizing the app (or apps) purchased. Choose [Go To New App](#) to be taken to [Apps >> App Store >> My Products](#). In the [3rd-Party Apps](#) section, the newly purchased third-party app will display.

### Adding a New Property to an App

- Go to: [Entrata >> Apps >> App Store >> 3rd-Party Apps >> Installed Apps](#)

1. Select [Add to Property](#) under the Collections app title you would like to add a property to.

2. Click [Manage Apps](#).

A window opens displaying all of the properties that have already been enabled and all of the properties that are not yet enabled for this app.

3. Check the boxes inline with the property names you want to enable this App for.

4. Click [Submit](#).

### Adding a New Collections App to the App Store

- Go to: [entrata.com/app-store/submit-app](#)


1. Enter the [Basic Info](#) for the app you want to add.


2. Select the [Receive Notification on Install](#) checkbox if you want to receive a notification email when the app is installed.


3. If you want, you can upload a [Logo Image](#) and [Screenshots](#) of the app by clicking [Choose File](#).


4. Check the [Data Scopes](#) that are required for your app.

5. Click [Submit to the App Store](#).

 Only admin users can purchase or add an app for a property.

 To remove any apps accidentally selected, either click [Cancel](#) underneath the app name or select the red [x](#) inline with the app title, under [Manage Apps](#).

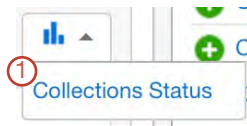
 Each property can only be assigned to one collections vendor.

 An admin user must log into the Collections App from [Entrata@](#) before the app will exchange information with Entrata.

## Generating a Collections Report

- Go to: Entrata >> Dashboard >> My Dashboard >> Financial >> Collections

1. Select **Collections Status** from the **Reports** drop-down menu.




2. Click **Add** in the **Property Groups** section to filter by one or more properties.
3. Select properties by clicking the green plus icon next to the property name.
4. Set additional filter options as desired.

### Set Display Options

In order to set display options, you must have already set required filters.

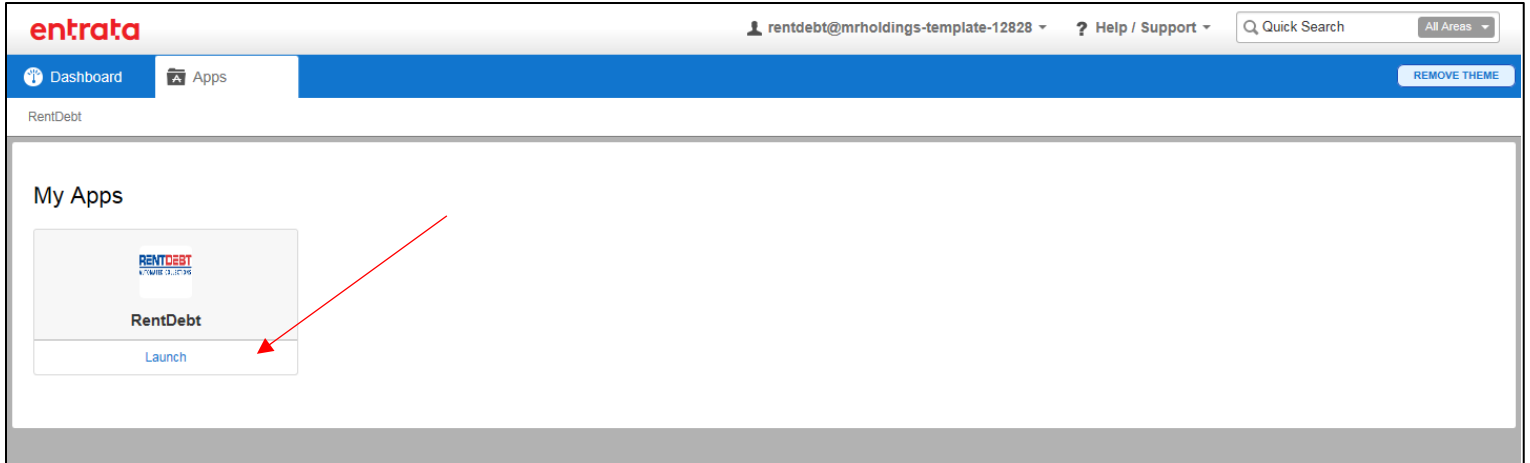
- a. Click the **Display Options** tab in the **Report Filters** window.
- b. To remove columns from the report, click and drag items from the **Active Columns/Column Order** area into the **Disabled Columns** area.
- c. Select **Primary Sort** and **Secondary Sort** options from the drop-down menus and choose whether information will be presented in **Ascending** or **Descending** order for each.

 For more information on reports in Entrata, see the [Entrata PaaS Reports User Guide](#).

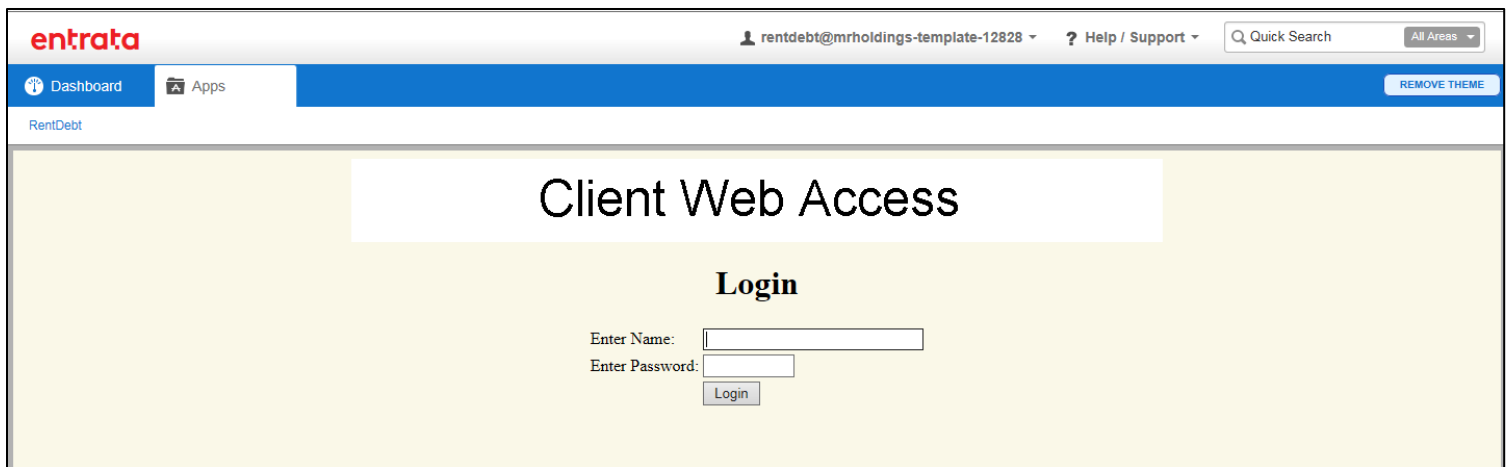


5. Click **Generate Report**.

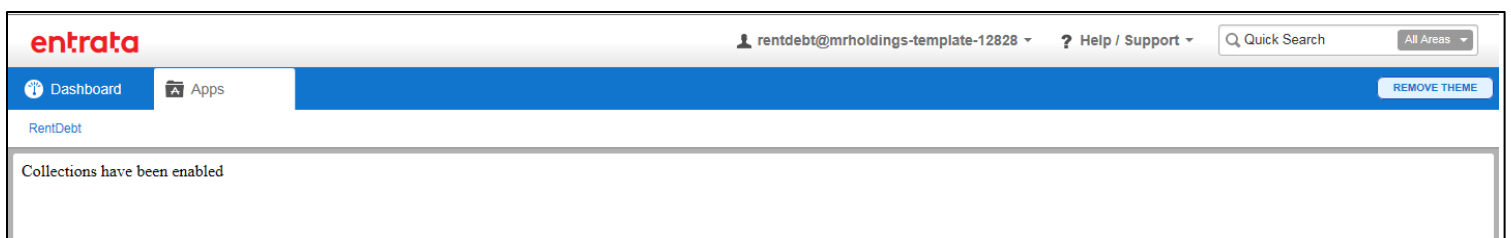
## Entrata App Store and Enabling Collections



1. After setting up RentDebt as a vendor in the App Store, you will select “Launch”



2. You will use your RentDebt login credentials to enable the collections interface
3. “Collections have been enabled” will appear



4. RentDebt will now be able to map your property to use the interface and receive accounts and documents via the interface