

Entrata Quick Start Guide



How do I place an account into collections?

Manual Placements

If you place your accounts manually, you must manually mark your accounts for collections. When in the individual resident screen, go to the *More Actions* drop down and select the *Send to Collections* option. The account will be sent to Hunter Warfield on the next daily download.

Automated Placements

If you place your accounts automatically, your accounts will be flagged for collections by the system once the number of days configured in the *# of Days From Financial Move Out Date to Send for Collections* parameter has been met. The account must have a balance greater than or equal to the amount established during set up and the *Financial Move-out* date must be completed. You have the ability to override the number of days by manually marking the account for collections as specified above.

Frequently Asked Questions

How do I send multiple accounts to collections at one time?

If you are a manual placing client, on the main dashboard, go to the *Financial* tab, then the *Collections* section. Check the boxes for the resident names that you would like to send to collections and click the button *Send to Collections*. The account will be sent to Hunter Warfield based on the parameter your organization has configured for the *# of Days from Financial Move out Date to Send for Collections*.

Why isn't my account being sent to collections?

Entrata will not allow accounts to be sent where the *Financial Move Out Date* has not yet been completed. To correct, go into the individual resident screen for the account in question, complete the necessary information and send to collections again. Accounts will not be sent until the set number of days have passed. If you are still unable to identify the issue, please contact your Hunter Warfield representative for assistance.

How do I view the collections history on an account?

To see if an account has been sent to Hunter Warfield, in the upper right hand corner of the resident screen, the *Lease Status* is noted as

Past – In Collections. You can also click on the *Activity Log* tab in the resident screen. The activity log would have a record indicating *System sent this lease to collections* with the date and time.

How do I provide supporting documentation with an account?

All documents uploaded under the *Documents* Tab for a resident will be sent to collections with the account.

How do I update or cancel an account that has already been sent to collections?

Any updates made to an account once it has been sent to collections, will need to be sent to Hunter Warfield manually. If you have already sent an account to collections, please contact your Hunter Warfield representative or our Client Services team at 877-486-8927.

How do I prevent an account from being sent to collections?

There are times when you may want to make sure an account does not go to collections. To do so, navigate to the resident screen, in the *More Actions* drop down, and click the *Exclude from Collections* button. The *Lease Status* will now indicate *Excluded from Collections*. This is especially useful when using the automated method and you DO NOT want an account to be automatically flagged and sent to collections by the system.

I have sent an account to collections, why don't I see it in my Hunter Warfield Client Inventory Report?

Accounts are sent to Hunter Warfield based on predetermined parameters when your property was set up. Accounts may not appear on our reports because the account has a move-out date prior to the set minimum move out date for that property or because the balance wasn't over the set threshold amount. If you have confirmed these two settings and the account is still not appearing, please contact your account representative.

Why did an account go to collections before the required number of days?

Accounts are downloaded daily based on the parameters configured in Entrata. If an account has been placed in collections earlier than normally outlined, it is usually because a user has chosen to override the previously outlined parameters.