Yardi Quick Start Guide

How do I place an account into collections?

To identify your accounts that need to be sent to collections, in Yardi, navigate to *Interfaces > Collections Resident Delinquency Summary* report*. Set the Resident Status to *Past;* Collection Status to *Unmarked* and click *Submit.* The report that appears will outline your past due accounts. (** If your menu has been customized, you may need to utilize the Yardi Voyager search feature or contact your Hunter Warfield representative for assistance.)*

Manual Placements
For manual placements, you will need to physically check the *Mark for Collections* box and click *Save.* These accounts will then be retrieved by Hunter Warfield daily.

Automated Placements
For automated placements, past due accounts with a balance over the set threshold amount will be sent to Hunter Warfield automatically based on your corporate parameters.

Frequently Asked Questions

How do I provide supporting documentation with an account?
From the *Collections Resident Delinquency Summary Report,* in the *Attachments* column, the first number indicates the number of attachments that have been selected to go to collections, the second number indicates the number of attachments uploaded to the resident. It is important to note that the account must be in a *Ready* status to include attachments and after an account has been sent to collections, any additional attachments will need to be sent manually.

How do I identify accounts in need of my attention?
To identify accounts that need your attention, navigate to *Interfaces > Collections Resident Delinquency Summary* report. Set the Collection Status to *Pending* and click *Submit.* Any accounts with the Current Collections Status of *Pending* indicates that at least one or all of the residents on that account are missing the Social Security Number. To resolve the pending status, click on the *Resident Id* link, click on the *Other Info* tab and add the appropriate Social Security Number for the primary resident and any additional *Roommates* on the account. Click *Save.* Check the *Mark for Collections* box on the account again and click *Save.* If a Social Security Number is not available, check the *Mark for Collections* box and click *Save.*

How do I prevent an account from being sent to collections?
If you want to prevent an account from being sent to collections, change the Collection Status to something other than *Ready* or *Pending* such as *Payment Plan.*

How can I view the collections history on an account?
Navigate to *Resident > Data > Collections Interface* to see the *Collections History* containing all collections activity for the resident. This can also be viewed by clicking on the hyperlink in the *Current Collections Status* column on the *Collections Resident Delinquency Summary Report.*

Why isn't my account being sent to collections?
Deposit accounting must be completed before an account will be sent to collections. If you are an automated user, accounts will be sent when the set number of days has passed.

What do the collections status' mean?
<u>Ready</u> – indicates the account will go to Hunter Warfield in the next download.
<u>Pending</u> – indicates that a Social Security Number is missing on one or more residents on that account.
<u>Sent</u> – indicates that Hunter Warfield has received the account. Any updates made to an account once it is in a *Sent* collections status, will need to be sent to Hunter Warfield manually.

I have sent an account to collections, why don't I see it in my Hunter Warfield Client Inventory Report?
It is possible that the current Collections Status on the account in question is labeled as *Pending.* If so, it indicates that a Social Security Number is missing on one or more residents on that account. It is also possible that your effective date conflicts with a property or corporate account level setting or your balance is not over the set threshold amount. If none of the above, please contact your Hunter Warfield representative for assistance.

Why did an account go to collections before the required number of days?
If an account has been sent to collections prior to the required number of days, it is usually because a user has chosen to override the previously outlined parameters.

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.

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