Increase Cash Flow & Reduce Write-Offs

AR & Collections Manager

Addin for Microsoft Dynamics 365 Business Central

Languages: English
CountriesL All Countries
Clients: On Prem and Web Clients

Business Central Addins
a Vertical Leap Company

Track and collect overdue accounts and manage the collection process

AR and Collections Manager takes the power of Dynamics 365 Business Central and combines it with a specialized Contact Manager designed for Accounts Receivable. By bringing together all the different functions within one screen, it gives you both the data and tools needed to keep your company's Cash Flow moving and minimize losses.

The system will suggest who to contact and when and will track every interaction so that your collections staff are armed with everything they need to get their job done. They will even move from being reactive—chasing down overdue invoices—to being proactive, by addressing large invoices and potential problem payers before they become an issue

By recognizing and creating systems for difficult situations, like Write-Offs or Disputed Invoices, AR & Collections Manager empowers collections staff to make decisions and act quickly and confidently.

Customers frequently see a spike in freed-up cash flow within 60 days of implementing AR & Collections Manager.

Manage all aspects of Accounts Receivable in a simple, organized fashion

Solution Benefits

Increase Cash Flow

by quickly addressing overdue accounts and decreasing collection costs all while minimizing write-offs.

Improve Collector Productivity

by using limits and triggers, a central interface for dispersed information, and streamlined processes.

Cultivate Long Term Customer Relationships

using the Cash Flow Projection Report and access to up to date AR information.

Make Decisions with Confidence

with consistent, well-informed contact and secure client confidentiality.

Featured Solutions

The Exceptions List

The Exceptions List can be viewed as a "TO DO" list with constantly updated activity due dates. With one-click generation,
it is always up to date.

Displays
- Overdue invoices
- Exceptionally large invoices
- Unapplied payments
- Unapplied credit memos
- Disputed invoices
- Short Paid invoices
- Exceeded Credit Limits

The Exceptions Manager

The Exceptions Manager provides the same general functionality as a Contact Manager but is geared to collection requirements. It brings together all the information you need for the collections process.

One Click Access to:

- Customer's complete payment history (including average days to pay and average days late calculations)
- Customer's contact history and ability to update with new information
- Aging reportsOpen sales order and invoice detailsOther Critical Information
- E-mail*
- Printing of invoices and statements*
- Filling in payment date promises and setting new contact dates

(*Some features above require Easy PDF to send formatted doc's automatically)

Confidential client payment information or notes on client contacts can only be accessed by those who have approval.

Featured Solutions

Automation & Trigger Points

Automation and preset Trigger points can be set for a range of AR and collection activities. These allow for customizable and strategic priority setting in the AR and collections process. These can be global or customer-specific.

Trigger points determine when an invoice will be added to the Exceptions List for collection activity. For example:

- Invoices overdue by X days will be added.
- Large invoices can be set to trigger reminders before due dates.
- Chronically late payers can be flagged to be contacted earlier than others based on calculated Payment History Status.
- Follow up contact dates can be set.

Customizable Credit Management

Automated management of credit limits and holds may be global or client-specific.

- All Invoices are added to the Exceptions List and highlighted when credit limits are reached.
- Payment Classes Status is calculated using a customer's average payment history, relative importance to the company, and customer-specific trigger points.

Streamlined AR Processes

Cash Flow Report based on promised payment amounts and dates.
Simple Clear systems for complicated AR situations: Short Paid Invoices, Chargebacks, Write-Offs, Disputes

These invoices do not need to be overdue to trigger a display in the Exceptions List.

Streamline your AR and Collections Management

Contact us or your local provider to order today.

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