Atradius Flow

Credit insurance has never been simpler

We now introduce Atradius Flow so that you, as a user of Microsoft Dynamics
365 Business Central, can integrate your credit insurance with your financial system.

Credit insurance integrated directly into Microsoft Dynamics 365 Business Central
Atradius Flow is an add-on module for Microsoft Dynamics that integrates your credit insurance with your financial system. Atradius Flow will enable you to work with credit insurance within your own well-known environment and automate processes related to credit insurance. In addition, you will experience a high level of security, because your credit insurance data are always updated and correct. Atradius Flow is easy and fast to install, so you can quickly start experiencing all the benefits of working with credit insurance in Microsoft Dynamics 365 Business Central.

"Atradius Flow enables us to manage our credit insurance more efficiently."

Dennis Pedersen, Finance Manager at Molo A/S

Benefits

By integrating credit insurance into your own workflow, Atradius Flow simplifies the administration of your credit insurance. Atradius Flow offers you three clear benefits:

- Atradius Flow automates your important daily credit management workflows, thus saving you time on manual typing and reducing the risk of typing errors. This will release time for core business tasks and will offer greater security in your credit management process.

- Because Atradius' information about your buyers are now available within your own finance system, Atradius Flow offers increased insight in your credit risk and an opportunity to improve knowledge sharing about your credit risk across your organization. Atradius Flow provides you with important information that you need to manage your credit risk, where you need it and when you need it.

- Atradius Flow makes it easier and faster for employees to start working with credit insurance. Because administration of your credit insurance is now an add-on module in your well-known Microsoft Dynamics environment, training is fast and simple.

How it works

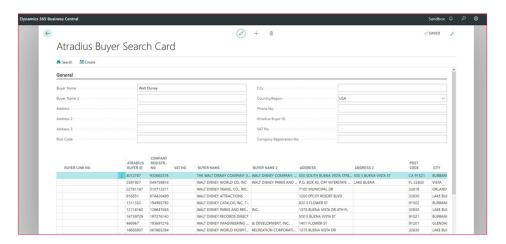Atradius Flow has four main functions:

You can create new buyers/customers, manage your credit limits, submit non-payment cases and - as a completely new feature - use Atradius Action Worksheet. On the following pages, we give you an introduction to each of the four functions.

Create buyers/customers

Atradius Flow is connected to Atradius' global buyer database. This means that you quickly and easily can look up your customer in Atradius' database and subsequently create the buyer in your own customer ledger. If your customer is already created in Microsoft Dynamics, then you can use the information from your customer card to look up the customer and subsequently create the customer in the Atradius Buyer Card.
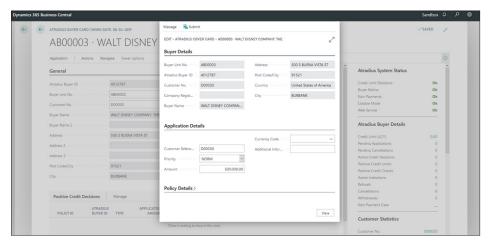

With Atradius Flow, you have access to more than 240 million buyers.

Managing credit limits

Applying for credit limits will most likely be the function you use the most. We have therefore strived to make the flow easy. You can apply for credit limits directly from your Buyer Card or Customer card. Once you have linked your Customer Number to our Buyer ID, you can use Atradius Action Worksheet to quickly and easily manage your credit limits.

With Atradius Buyer Overview, which is also a part of your Buyer Card and Customer Card, you have a complete overview of the credit insurance related activities on your customer in one screen. Among other things, you can see open applications, existing credit decisions, cancelled and withdrawn credit limits, as well as submitted non-payment cases.
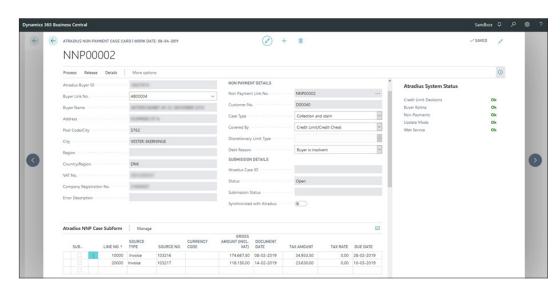

With Atradius Flow, it has never been easier to manage your credit limits.

Submitting non-payment cases and transferring to Collections

Sometimes customers do not pay their debts. That is one of several reasons to use credit insurance. We have made it easy for you to submit non-payment cases to us.

When a customer has an overdue payment, and a notification of non-payment needs to be submitted to Atradius, Atradius Flow will automatically collect your open entries on your customer (e.g. invoices, credit notes, payments and counter claims). All you need to do is determine the case type (e.g. collection and/or claim), add any comments you might have and check that all relevant entries are included, before you with one click submit the case to Atradius.

You will benefit from our "List of submitted cases" that gives you an overview of your submitted cases. On each case, you have the possibiity to follow the collection process and the claims examination. Additionally, you can easily update the case if new entries are entered into your customer ledger.

Submitting non-payment cases is simple with Atradius Flow..

Automate most of your manual processes with Atradius Action Worksheet

Atradius Action Worksheet

Atradius Action Worksheet will help you manage your credit insurance. The Action Worksheet identifies events that are relevant for the administration of your credit insurance and recommends specific actions based on our common data in Microsoft Dynamics. With a single click, you can easily and quickly perform multiple actions at once.

Atradius Action Worksheet suggests:

- Updating your internal credit limit on your customer card when there are new credit limit decisions or changes to existing credit limit decisions from Atradius.

- Submitting non-payment cases when there are overdue invoices on insured customers.

- Automatic cancellation of internal credit limits on your customer card and of your Atradius credit limit, when you have not traded with the customer within a given period. This will make it easy for you to manage your credit limits and reduce credit limit fees.

There is a good reason for why we call Atradius Action Worksheet for a worksheet: It only suggests actions. You decide if you want to follow the suggestions and are always in control. The Atradius Action Worksheet helps you to manage your credit insurance and to comply with the terms and conditions of your policy.

More security, less manual typing

Atradius Flow gives you just what the name implies: Flow. When the credit insurance is integrated into Microsoft Dynamics, the person that administrates the credit insurance can perform the work more efficiently, while simultaneously minimizing the risk of errors.

How to get started?

1. Contact your local Atradius office to get an offer for credit insurance.
2. Finalize agreement for credit insurance and Atradius Flow for Microsoft Dynamics 365 Business Central.
3. Atradius will facilitate installation and set-up of Atradius Flow for Business Central, via your Microsoft Dynamics Partner.
4. Link Atradius buyers to your customer record in Business Central.
5. You are ready to work with credit insurance in Microsoft Dynamics, Business Central.

Atradius
Sluseholmen 8A
2450 København SV
Tel.: 33 26 50 00
E-mail: info.dk@atradius.com

www.atradius.dk