

## Collect 365 Quick User Guide

The following steps will lead you through the setup and operation of Collect 365 within Microsoft Dynamics 365 Business Central. Users are given access to the Collect 365 extension by assigning the Collect Permission Set within the User Card.

## Collections Hub Window overview

Collections Hub is where all active debt collection activity is aggregated and displayed for a debt collector. Use the Collections Hub Window to review and complete most of the user's Collections tasks. You can review and create notes and interactions, view financial information, perform scheduled tasks, create future tasks, and create/issue reminders to customers.

PAA COLLECTIONS HUB | WORK DATE: 4/6/2020

30000 · School of Fine Art

Entries Reminders Issued Reminders Create Task Navigate Fewer options

**General**

No.	30000	Balance (\$)	53,833.52
Name	School of Fine Art	Balance Due (\$)	51,793.67
Salesperson Code	PS	Payments (\$)	185,115.41
Credit Limit (\$)	0.00		

**Note** >

**Contacts** >

**Interactions** >

**Ageing**

Interaction Log

Period Start	Period End	Amount
11/1/2019	11/30/2019	0.00
12/1/2019	12/31/2019	0.00
1/1/2020	1/31/2020	114,399.05

## Collectors Window overview

Where companies have more than one person in the Accounts Receivable or Debt Collection team the customer accounts can be allocated to individual Collectors. This focuses and streamlines work packages for each Collector and helps with performance reporting and analysis.

The Collectors Window gives the ability to correlate existing User IDs as Collectors. Collectors can then be assigned to both customers within the Customer Card and tasks from the Collections Hub.

User ID	Name	E-Mail	Phone No.
TEAMMEMBER	Team Member	c1@pa.com.au	555-555-0123

## Additional options available – Process – Create Reminders overview

The following options have been added to the Create Reminders process to give you more flexibility when creating reminders for multiple customers.

- Exclude Recently Paying Customers – By default this excludes customers that have made a payment within the last 10 days.
- By default, both Collector and Balance Due will be listed under available filters. Additional filters can be added by clicking the +Filter button.

## Additional feature – Issued Reminders overview

A new field 'Status' has been added to Issued Reminders. Application of payments will automatically update the Status on Issued Reminders:

- Current – No payments have been registered against any associated documents.
- Partial – Payments have been registered against associated documents, but there is still a remaining amount due.
- Completed – There is no balance due on all associated documents.

## Additional feature – Interaction Log overview

The following additions have been made to the interaction log to give you the ability to view all interactions made to a customer. The interaction log is made available to view from within the Collections Hub Window.

- A note field has been added to Interaction Log records, giving you the ability to detail/describe any relevant information regarding the log item.
- Printing/Sending Reminders now adds a record to the Interaction Log to give you visibility on all communications made to the customer.
- Issued Reminders are color coded to give instant visibility to action items that still require follow-up.

## Additional feature – User Tasks overview

Following a phone or email interaction with a customer you may want to create one or more future tasks in order to follow up on the matter, for example resend the invoice today then call the customer tomorrow to confirm receipt and request a promise to pay.

Use the Create Task process within the Collections Hub to create a future User Task that will be associated with the current Customer. These tasks can then be assigned to a Collector. If the customer has been assigned a Collector, the User Task will be automatically assigned to them by default.