

Getting started with Collect 365

This document is to help you get started using Collect 365 for Microsoft Dynamics 365 Business Central from Professional Advantage to improve your debt collections processes and outcomes.

This is a jump start user guide and assumes that you have downloaded the Collect 365 extension from Microsoft AppSource, installed it into your Microsoft Dynamics 365 Business Central instance and have access to system administration steps.

Recommendation: Start in the Cronus test business unit to get familiar with the functionality before applying to any production business unit(s).

1) Set up your Collections team (sole Collectors can skip this step)

If there is more than one person in your collections team then start by assigning those users in the Collectors window.

User ID 1	Name	E-Mail	Phone No.
TEAMMEMBER	Team Member	c1@pa.com.au	555-555-0123

2) Assigning customers/accounts to a Collector (sole Collectors can skip this step)

If you have created a number of Collectors, you can then assign the relevant Collector to each of your customers/accounts by selecting the appropriate Collector within the Customer Card.

CUSTOMER CARD | WORK DATE: 4/6/2020

30000 · School of Fine Art

New Document Request Approval Navigate Customer Actions Navigate Report Fewer options

General Show more

No.	30000	Blocked	
Name	School of Fine Art	Collector	TEAMMEMBER
Balance (\$)	53,833.52	Total Sales	65,142.70
Balance Due (\$)	51,793.67	Costs (\$)	40,992.80

3) Using the Collections Hub

Open the Collections Hub window. This is where all active customers/accounts for the nominated Collector will be displayed. You can:

- a) View interactions, tasks and reminders
- b) Create new user tasks that can be assigned to the appropriate Collector
- c) Create reminders for customers based on several criteria (ie: customers assigned to a specific Collector or with a balance due over a specific amount)
- d) Track progress of current tasks/reminders associated with a Customer
- e) View previously issued reminders and easily identify reminders that are associated with documents that haven't been paid
- f) Generate invoice reprints and current statements

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 (\$)	\$1,793.67
Salesperson Code	PS	Payments (\$)	185,115.41
Credit Limit (\$)	0.00		

Note >

Contacts >

Interactions >

Ageing

Interaction Log

	Period Start 1 ▼	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	11,439.05