



Collections Management for Acumatica



DATA SHEET

COLLECTIONS MANAGEMENT

INCREASE CASH FLOW AND AUTOMATE COLLECTION ACTIVITIES

Easily create collection activities and manage overdue invoices with automated collection plans and email templates, then prioritize collections efforts for maximum success.

COLLECTIONS DATA AT YOUR FINGERTIPS

- **Collections Dashboard:** View all of your open invoices by customer and your activities by collector.
- **Quick Customer View:** Drill down into the details of your collection activities for any client or task.
- **Yearly View:** Get a quick view of current and last year customer sales, including outstanding sales by custom-defined aging.

AUTOMATE COLLECTION ACTIVITIES

- **Set-up Multiple Collection Plans:** Schedule activities and auto-generate emails and activities based on invoice dates.
- **Create Templates:** Automate the collection process with multiple templates.
- **Automatically Closes Activities:** No more manual work to close once the invoice is paid.

KEY BENEFITS

GET PAID FASTER

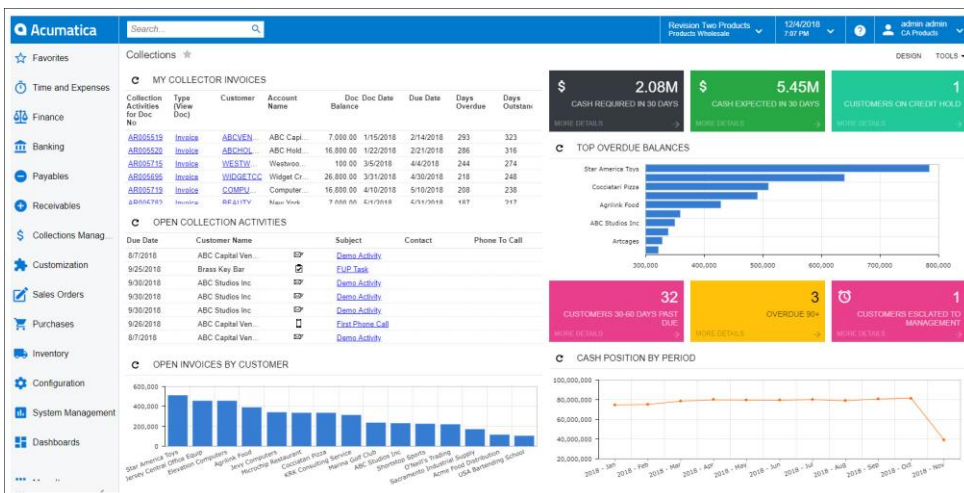
- Achieve higher collection success rates
- Reduce time spent collecting from your customer
- Accelerate cash flows
- Fewer days with sales outstanding
- Minimize risk of bad debt write-offs

FLEXIBLE AND AUTOMATED

- All information in one screen
- Create multiple collection plans
- Schedule future activities
- Automate the collection process by customer
- Automatically close activities tied to paid invoices
- Automatically generate emails based on customer invoice dates
- Create collection email templates

STOP SEARCHING AND START USING INFORMATION

- Use filters to find specific activities
- Analyze your activities with built-in query tools, pivot tables, and dashboards



Acumatica

The Cloud ERP



Collections Management for Acumatica



DATA SHEET

COLLECTIONS MANAGEMENT FEATURES AND CAPABILITIES

Natively Built Within Acumatica

Seamless integration for all collections details.

Easily Create Collection Activities

Quickly create and track collection activities including phone calls, emails, notes, and tasks and associate the activities with open Receivable documents.

View & Manage Collection Activities on a Single Screen

View all customer activity and history, and schedule future activities. View customer invoices, and open and closed activities for a specific customer in the same screen.

Customer	Plan Step	Late Days	Activity Type	Template	Report	FUP Days	Email To	Activity Subject	Executed E
ABCSTUDIOS	3	50	EMAIL	Collections 2 Te...	ARS41000		info@abcstudios.com		
ABARTENDE	2	36	PHONE			5		Past Due Invoice - Follow up in 5...	
BEAUTYSCH	5	187	EMAIL	Collections 2 Te...	ARS41000		Bart@megamail.com		
BIBMBAB	2	41	PHONE			5		Past Due Invoice - Follow up in 5...	
BRASSKEY	3	64	EMAIL	Collections 2 Te...	ARS41000		livernols@brass-key...		
CARIBBEAN	2	35	PHONE			5		Past Due Invoice - Follow up in 5...	
ABCHOLDING	5	286	EMAIL	Collections 2 Te...	ARS41000		info@abcholdings.com		
ABCVENTURE	5	293	EMAIL	Collections 2 Te...	ARS41000		info@abcventures.com		

Automatically Close Activities

Automatically close activities associated to paid invoices, freeing up the collector to focus on unpaid documents.

Custom-Defined Collection Plans

Create multiple collection plans and based on your customer payment history, tie a specific automated collection plan to each customer.

User Security

Associate specific customers to specific collectors, allowing the collector to view only their activities and outstanding invoices.

Create Email Templates

Design your own email templates using the native Acumatica email functionality and based on customer plan steps.

Data Analysis

Use built-in tools for analysis on activities, days past due, slow-paying customer to reduce your days-to-pay number.

THE ACUMATICA ERP DIFFERENCE

Acumatica delivers a full suite of integrated business management applications unlike any other ERP solution on the market today.

STREAMLINE OPERATIONS

Manage your business more efficiently:

- Automate processes
- Control workflows
- Access the system from anywhere on any device—including mobile
- Promote collaboration with all-inclusive user licensing

ADAPTABLE SOLUTION

Add and extend:

- Deploy in-house, or in a private or public cloud
- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

YOUR BUSINESS ACCELERATED

Get a single version of the truth:

- Accelerate business performance and make smarter decisions with automated processes, real-time data collection, financial analyses, and forecasting
- No per-user pricing – system scales as your business grows

