Crestwood Associates
ERP Solution Experts

Social Media

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Overview
Crestwood Associates is an award-winning Acumatica and Microsoft certified partner with proven success in 5,000+ ERP implementations. For more than 25 years, Crestwood Associates has been providing innovative technology solutions to accelerate operational efficiencies for mid-market organizations. Best known for delivering unparalleled value to their clients, Crestwood serves thousands of clients nationwide, and is rapidly expanding reach across the United States.

For more information about Crestwood or ERP solutions, visit **crestwood.com**

COLLECTIONS MANAGEMENT

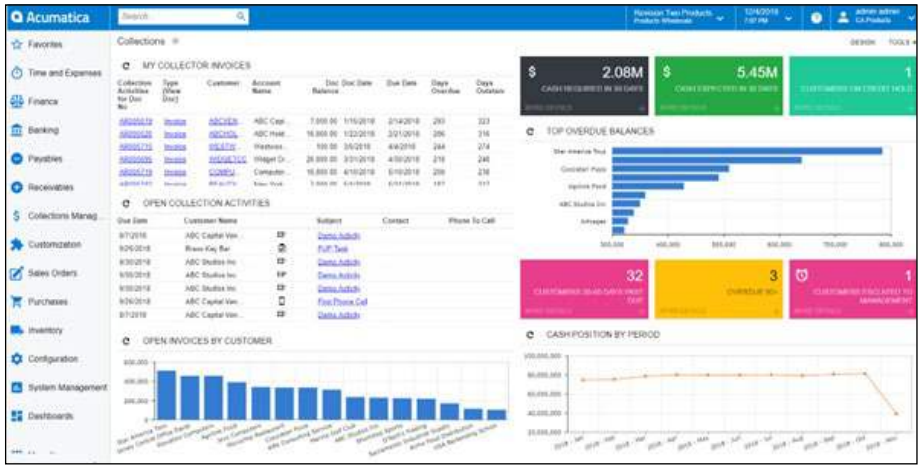
Increase cash flow and automate collections activities within Acumatica

Acumatica CERTIFIED APPLICATION

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 Collections 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

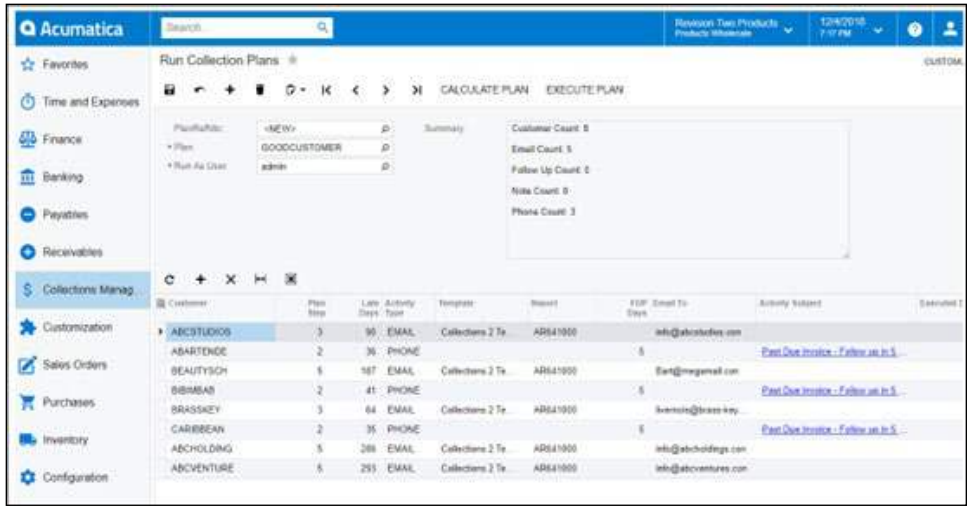
Collections Management

COLLECTIONS MANAGEMENT

Increase cash flow and automate collections activities within Acumatica

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.



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.

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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

Learn more and request a consultation with our ERP Experts at crestwood.com

Acumatica
The Cloud ERP