



# Collections Management for Acumatica

## RELEASE NOTES

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Acumatica Software Versions Supported –2023R1  
Last updated: July 2023

## Release Notes - v2023R1

04-13-2023 CR-CM23002 (Version - 1.009.0001)

**Notes:**

- Initial Release for 23R1

05-10-2023 CR-CM23007 (Version - 1.009.0003)

**Notes:**

- Resolve issue where attachments are not being generated for emails

05-15-2023 CR-CM23008 (Version - 1.009.0004)

**Notes:**

- Resolve issue with looping messagebox when attempting to change customer status to "Inactive".

07-14-2023 CR-CM23009 (Version - 1.009.0006)

### Add/Edit Contact from Collections Activity

**Category: Enhancement**



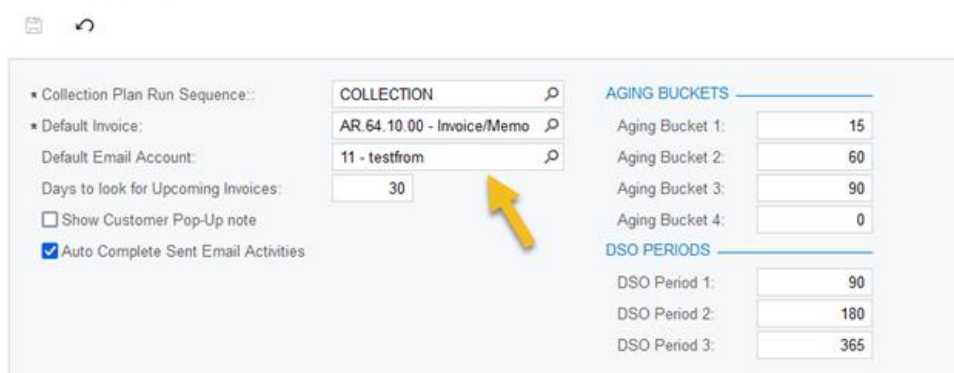
Added Pencil button to allow for users to Add/Edit contacts on the fly from within the Activity Screen

### Email Changes

**Category: Maintenance**

Changed Preferences Screen to select an email account rather than a free form email address entry.

Collection Preferences ☆



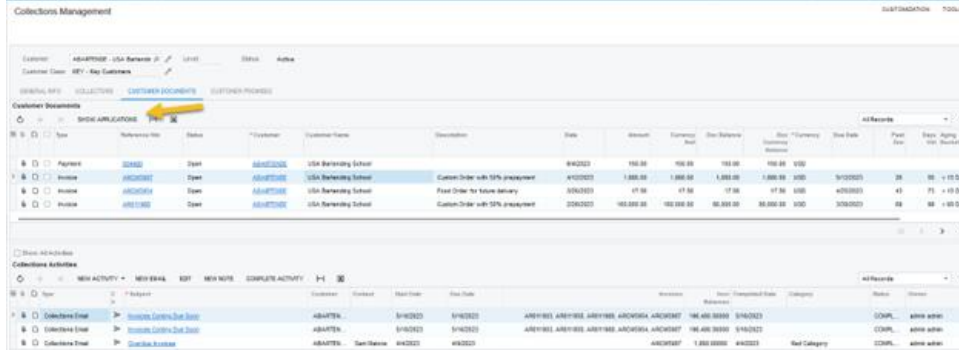
Changed logic within Plan Execution and Spontaneous Email Activities to leverage this default account for the From email and account used to send if the user's email account is not setup as an System Email Account or the Email Template from Email is not found as a System Email Account.

Previously, emails could be created with a From address that did not match the Account being used to send them – causing spam detection/delivery issues.

## Collections Manager Screen Layout

Category: Enhancement

Coll Mgr Screen Layout



- Removed Applications Grid from main screen
- Resized existing grids to better display data
- Created Smart Panel to show Applications for Selected Payments
- Added Promises tab

## Collections Plan Clarifications

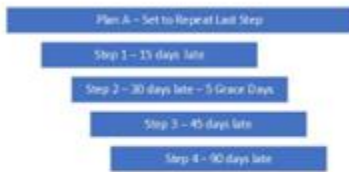
Category: Maintenance/Documentation

There was some confusion as to how the Grace Period, After Last Step worked and how they worked together.

- Renamed "After last Step" to "After Last Executed Step"
- Included examples to clarify After Last Executed Step

### After Last Executed Step Examples

#### Repeat Last Step Example



- Customer is 28 days late on latest invoice – plan is run and Step 1 performed
- Plan executes again 4 days later (32 days late) and Step 2 is not executed because of grace period between executions
- 3 days later Plan is run again and Step 2 is executed - because grace period has been exceeded
- 7 days later Plan is run again (42 days late) and Step 2 is executed because grace is exceeded and After Last Step is set to Repeat Last Step.

#### Stop Example



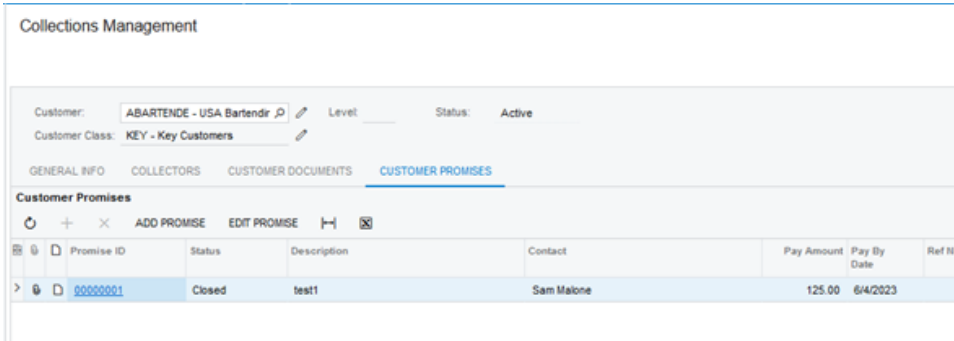
- Customer is 28 days late on latest invoice – plan is run and Step 1 performed
- Plan executes again 4 days later (32 days late) and Step 2 is not executed because of grace period between executions
- 3 days later Plan is run again and Step 2 is executed - because grace period has been exceeded
- 7 days later Plan is run again (42 days late) and Step 2 is NOT executed because After Last Step is set to Repeat Last Step.

## Promise Management

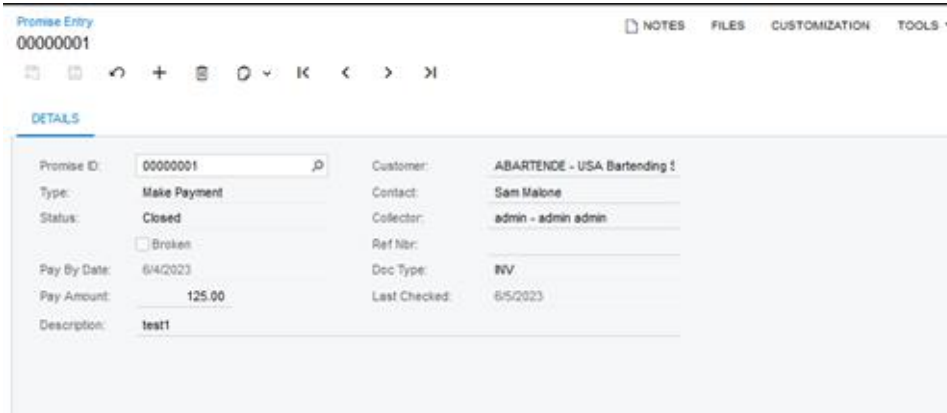
Category: New Feature

Added Promise Management features to Collections. This will allow users to manage/track promises to pay given by customers. Promises can be added from either the following locations:

- Collections Management Screen (CWCM4001) on the Promises tab

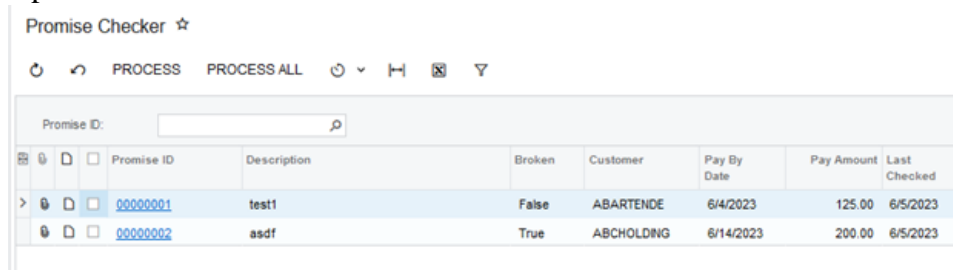


- Promise Entry (CWCM3002)

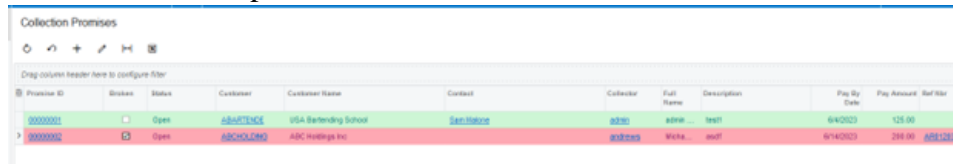


A promise can either be a promise to make a payment (Make Payment type) in general or a promise to pay an amount against a specific invoice (Pay Invoice type). The required fields for each are slightly different, however the minimum data required would be a Pay By Date, a Pay Amount, a Customer/Contact.

A process has been created to detect broken Promises - called the Promise checker.

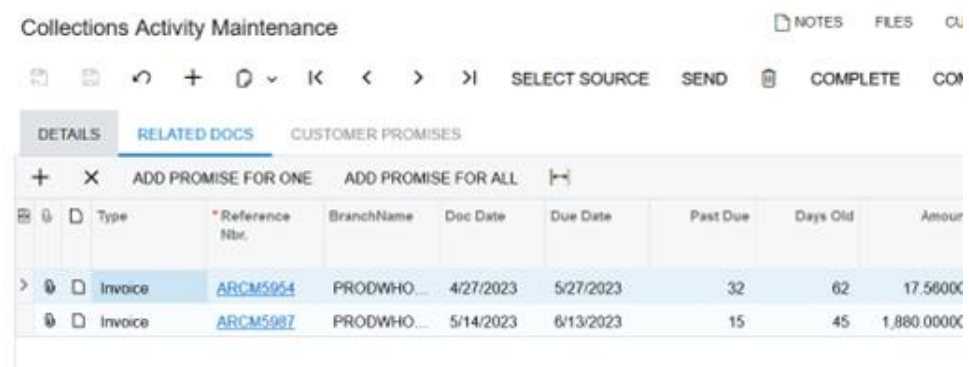


It should be run regularly or scheduled to run automatically. It will evaluate each of the open promises against the criteria to determine if a promise is broken or not. If so, it will be marked broken and will show as Red in the promises list.

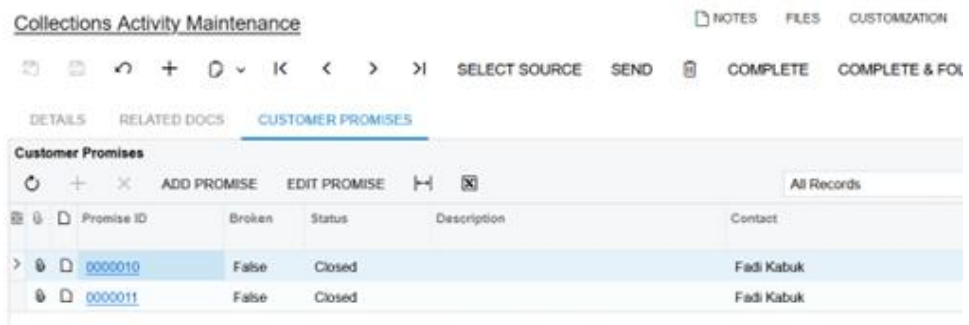


The users will then determine how best to respond to each broken promise within Collections (ie creating Activities, changing plans etc)

From the Activity Screen, you are able to create new promises based on Related Documents:



You can then review all Promises for that Customer on the new Promises Tab:



## Activity Complete/FollowUp

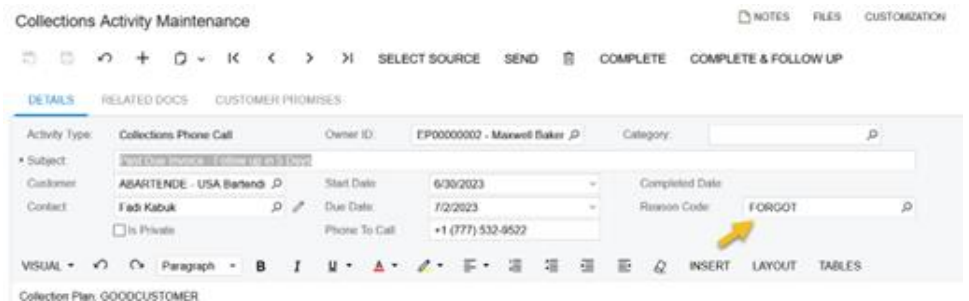
### Category: Maintenance

In some circumstances when selecting Complete/FollowUp on an Activity would not copy the Related Docs to the new Activity. This issue has been resolved.

## Reason Codes

### Category: New Feature

Reason codes have been added to the Activities screen in order to more easily report/categorize your activities.



Reason Codes are maintained in the new Reason Codes maintenance screen (CWCM2006):

## Reason Codes



	Reason Code	Description	Active
>	CASHFLOW	Cash Flow Problems	<input checked="" type="checkbox"/>
	DONTUSEME	Dont Use	<input type="checkbox"/>
	FORGOT	Forgot about it	<input checked="" type="checkbox"/>

## Reassign Collectors Process

### Category: Maintenance

Resolved issue with unintended updates to collector assignments due to class.