



Advanced Credit Management

The most complete, efficient & innovative
Credit Management solution for Microsoft Dynamics® AX in the world.

Advanced Credit Management automates and streamlines the business processes involved in good credit control management. Built 100% in Microsoft Dynamics AX and tightly integrated with the Accounts Receivable and Sales Orders modules, it pro-actively suggests credit control activities improving cashflow, reducing bad debts and new account risk scoring.

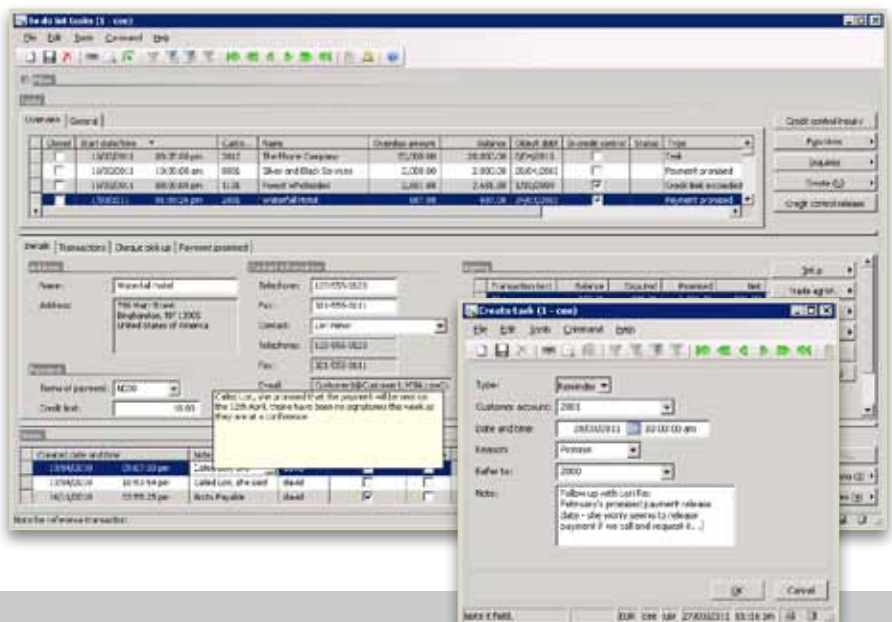
The solution is for organizations with 1 or 20 credit controllers.

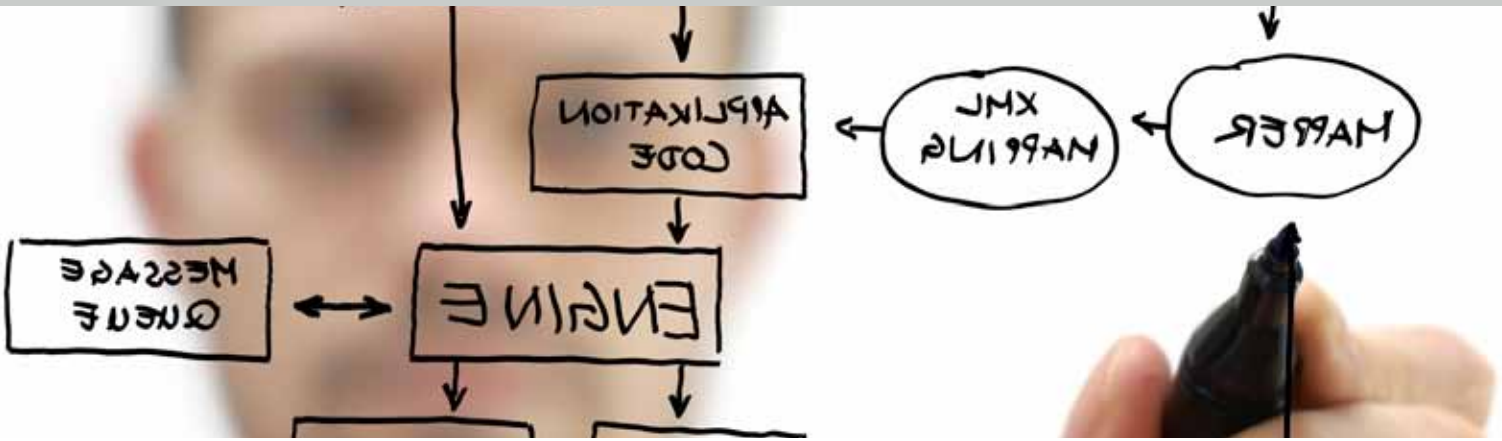
Features

- Self-Chasing
- To Do Lists
- Dispute Invoice Handling
- Automate Follow-Up Communication
- On Screen Statistics
- Set Target Collection KPIs
- Centralized Credit Control Queue
- Risk Scoring
- Detailed Chase History
- Automated Credit Control Officer Allocation
- Automated Allocation for Release of Cash on Delivery Orders

“ We looked at various solutions for our Microsoft Dynamics AX Credit Control requirements from across the globe and found that the Advanced Credit Management solution was rich in features and satisfied our requirements. ”

F.N. IT Manager, **Alspec Pty Ltd**





Credit Management

Cash flow is a key metric in any business.

Slow paying debtors cause an organization major issues. Best practice credit control management ensures the business maximizes profit. In today's world where organizations are increasingly extending their payment days, a software solution which gives the credit control department the tools necessary to run a tight ship is critical, it is even possible to enforce these practices.

Advanced Credit Management is a powerful, global credit control solution written in and for Microsoft Dynamics AX. It works with the Accounts Receivable and Sales modules to reduce bad debts, improve your cash flow and increase the bank balance. Credit control can be a time consuming exercise involving insight into various factors. The Credit Management solution ties all these facts into a simple, easy to use screen allowing the credit controller to make fast decisions and follow up.

The ability to make a quick decision on a "blocked" order because the account is overdue or is over credit limit means both the sales department and customer is more quickly informed and therefore satisfied. You don't even need to switch screens to see customers of multiple companies in your organization, allowing centralized configuration.

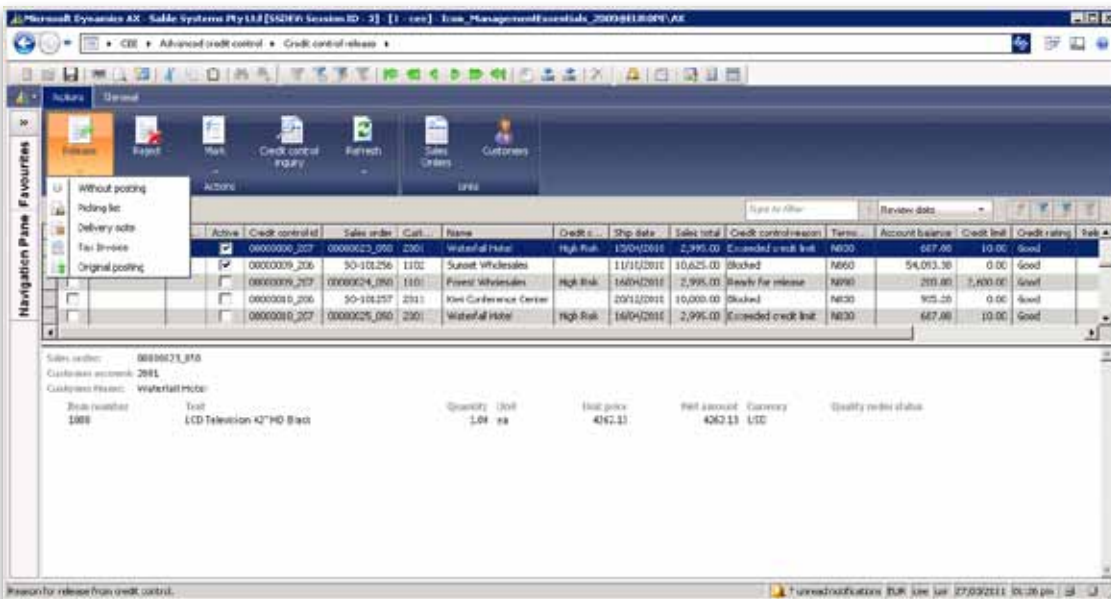
Never miss a follow up call and remove manual checks to see if that payment promised has been received – the solution simply removes the follow up task. Use the power of the module to automate tasks for overdue accounts and those nearing their credit limit.

Benefits

- Reduce bad debts by monitoring customers
- Save time due to Automated Credit Control Tasks
- Manage and control disputes so invoices get paid
- Save time and space in the warehouse by picking goods which can leave
- Reduce risk with automated Credit Risk Assessment
- Full integrated and written in Microsoft Dynamics AX language X++
- Minimize risk, full source code
- Reduce clicks, information tailored to the credit controller

▼ Credit Management

Sales orders failing a Credit Control rule such as an overdue account, or over credit limit are placed into a centralized form where all sales order under review for all companies (Multi Company) can be seen from the one place. Further checks and account follow up can precede the releasing of the order. The order can be checked at any point within the order cycle i.e. Confirmation, Picking List, Invoicing, etc.



Integrated Solution

Enhancing Microsoft Dynamics AX.

Advanced Credit Management is totally integrated into standard Microsoft Dynamics AX Sales Order Process and Accounts Receivable ensuring decision on credit extension and enforcement of credit limits are made at the source of processing with the full history of integration with the customer.

All notes, follow up discussions, statistics and aging can be seen from one place.

Statistical data and on-screen aging

Record dispute reasons

Record notes against unpaid invoices

Date	Due date	Docu...	Customer req...	Consign...	Amount ...	Balance	C...	Tran...	Exclude f...	Dispute	Dispute reason
4/0...	3/06/2008				23,472.46	23,472.46	USD		<input type="checkbox"/>	<input type="checkbox"/>	
18/...	17/06/2...				98,922.67	98,922.67	USD		<input type="checkbox"/>	<input type="checkbox"/>	
9/0...	8/07/2008				98,922.67	98,922.67	USD		<input type="checkbox"/>	<input checked="" type="checkbox"/>	LATE
30/...	29/07/2...				98,922.67	98,922.67	USD		<input type="checkbox"/>	<input type="checkbox"/>	
SIV-...	20/...	19/08/2...			98,922.67	98,922.67	USD		<input type="checkbox"/>	<input type="checkbox"/>	

Record notes against unpaid invoices

Created date and time	Note	only	Main note	Assigned to	Follow up date and time
16/03/2... 03:3...		<input type="checkbox"/>	<input type="checkbox"/>		12:00:00 am
8/10/2008 04:5...	Spoke	<input type="checkbox"/>	<input type="checkbox"/>	APRIL	12:00:00 am
8/10/2008 05:2...		<input type="checkbox"/>	<input type="checkbox"/>		12:00:00 am
9/10/2008 04:3...	Mary informed me that this has now been approved by the purchaser and will be paid next week on Thursday.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Admin	11/03/2009 07:41:32 pm

Record notes against unpaid invoices

Create and assign follow-ups

Managing Claims

Creating and managing claims is becoming increasingly important as more and more penalties are applied due to compliance. Not managing this process correctly can be very costly. Create claims at the time of recording customer receipts or as this issue is registered to the credit controllers.

Create claims (1 - cee)

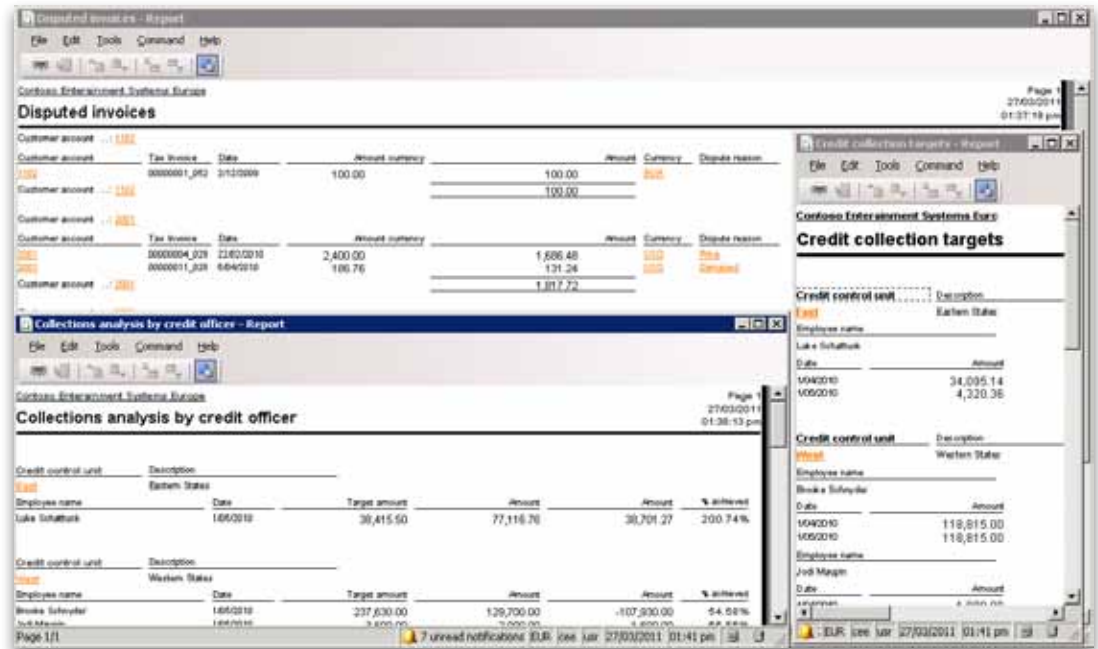
Claim number: 00000001188
 Customer account: 1101
 External claim number: CLAIM274332
 Claim amount: 200.00
 Currency: USD
 Claim basis: Quantity based
 Claim date: 27/03/2011
 Claim reason: Damaged
 Note: 3 Cartons were received damaged

Claims (1 - cee) - Claim number: 00000007_188, 768768

Claim number	Customer account	Name	External claim number	Inv. Invoice	Invoice date
00000003_188	1101	Forest Wholesales	RHh		
00000004_188	1101	Forest Wholesales	43		
00000005_188	1201	Sparrow Wholesales	847293		
00000007_188	1101	Forest Wholesales	768768	00000010_062	4/02/2011

Reporting

Comprehensive Microsoft Dynamics AX reporting to support the Credit Controllers, monitor the Credit Controllers performance and communicate credit positions and results to the rest of the business.



About Collins Computing

Founded in 1986 and located in Orange County, California, Collins Computing is the largest Southern California Gold Certified Microsoft Dynamics partner. Collins Computing is the only Microsoft Dynamics partner to be named to the prestigious Microsoft Inner Circle for 14 years. Exclusively delivering Microsoft Dynamics ERP and Microsoft Dynamics CRM applications, we've implemented solutions for some of the largest and fastest-growing businesses.

Collins Computing is a reseller and implementer of Microsoft Dynamics GP, Microsoft Dynamics AX and Microsoft Dynamics CRM for companies worldwide with a focus in Orange County, San Diego, Los Angeles, Ventura and Riverside.

We invite you to find out more about our company, Microsoft Dynamics, and our implementation services for ERP and CRM. Then give us a call and discover how Collins Computing can help you realize your greatest business potential.



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Count on Collins, Count on Success.