



# iSolutions

Get Paid Faster and  
Speed up Collections  
with iSolutions for  
Microsoft Dynamics  
365 Business Central



# Top 10 Features



1. **Automatic Email**
2. **Embed Payment Links in Your Invoices**
3. **Elimination of Duplicate Entry**
4. **Collections Manager**
5. **Ability to Send Out All Open Invoices with a Single Click**
6. **Bulk Processing**
7. **Automated Reminders with Click to Pay**
8. **Sales Order Deposits with POS**
9. **Quote to Cash and Order to Cash**
10. **Customer Payment Portal**

# Automatic Email

- Customers will automatically receive their Invoice by email without having to hit print/send
- Configurable by Customer with the document profile setting

The screenshot displays the Dynamics 365 Business Central interface for a Customer Card. The card is for customer '20000 · Trey Research'. The 'General' tab is active, showing various fields. The 'Document Sending Profile' field is highlighted with a yellow box and is set to 'EMAIL'. Other fields include 'No.' (20000), 'Name' (Trey Research), 'Salesperson Code' (JO), 'Balance (\$)' (3,046.12), 'Balance Due (\$)' (3,046.12), 'Credit Limit (\$)' (0.00), 'Blocked' (dropdown), 'Collector' (RMCBEE), 'Collections Plan' (dropdown), 'Responsibility Center' (dropdown), 'Service Zone Code' (dropdown), 'Total Sales' (45,931.40), 'Costs (\$)' (23,300.20), 'Profit (\$)' (20,660.40), 'Profit %' (47.0), and 'Last Date Modified' (8/24/2021). The right sidebar shows 'Details' and 'Attachments (0)'. Below the 'Customer Picture' section, there is a 'Sell-to Customer Sales History' section with 'Customer No.' (20000).



# Embed Payment Links in Your Invoices

- Customer Receives a Click to Pay on each Invoice
- Leverage the out of box Payment Service function with core BC
- Ability to pass Convenience Fees off to your customer

The screenshot displays the Dynamics 365 Business Central interface for a 'Posted Sales Invoice' (PS-INV103328) issued to 'Trey Research'. The interface includes a navigation bar at the top with the title 'Dynamics 365 Business Central' and 'Sandbox\_Demo'. Below the navigation bar, there are icons for back, edit, add, and delete. The main content area shows the invoice details, including a table of items and a summary section. The 'Payment Service' field is highlighted with a yellow box and is set to 'iSolutions Payments'. The 'Invoice Details' section is also visible, showing various fields like Currency Code, Shipment Date, and Payment Terms Code.

Item	Quantity	Unit Price	Total Price
1906-S ATHENS Mobile Pedestal	4	433.60	1,734.40

Invoice Discount Amount Excl. Tax	0.00	Total Tax (USD)	86.72
Total Excl. Tax (USD)	1,734.40	Total Incl. Tax (USD)	1,821.12

**Invoice Details**

Currency Code		Department Code	SALES
Shipment Date	8/25/2021	Customergroup Code	MEDIUM
Payment Terms Code	14 DAYS	Payment Discount %	0
Payment Service	iSolutions Payments	Direct Debit Mandate ID	
		Tax Liable	<input type="checkbox"/>
		Tax Area Code	CHICAGO, IL



# Elimination of Duplicate Entry

- Automatically Post to the Customer Ledger
- Option to make Bank Deposit Funding Entry

Dynamics 365 Business Central

Sandbox\_Demo

Merchant

Sample Merchant (496160873887)

New Process Settings More options

**Posting**

**NUMBERING**

Cash Receipt No.s ..... IPAY

Journal Template ..... CASHRCPT

Batch Name ..... GENERAL

**CASH RECEIPTS**

Account Type ..... G/L Account

Account No. .... 20500

Currency Code .....

Auto Post Cash Receipt .....

Use Apply-to Posting Descr. ....

**CONVENIENCE FEES**

Auto Convenience Fee .....


**Funding**

Enable Funding .....

Account Type ..... Bank Account

Account No. .... CHECKING

Last Sync Date ..... 9/14/2021



# Collections Manager

- Summarized AR Aging by Customer with Notes
- Ability to Filter based on assigned Collector

Dynamics 365 Business Central | Sandbox\_Demo

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing | Setup & Extensions

Collections Manager: All | Search | View All | **View Assigned Customers** | Page | More options

Customer No.	Name	Total outstanding invoices	Total outstanding invoices (LCY)	Total number of outstanding invoices	Current	1-30 days	31-60 days	61-90 days	Over 90 days	Unapplied Credit
10000	Adatum Corporation	-15,942.70	-15,942.70	44	9,505.86	1,677.34	0.00	0.00	0.00	-27,125.00
20000	Trey Research	3,046.12	3,046.12	5	0.00	3,046.12	0.00	0.00	0.00	0.00
30000	School of Fine Art	-18,839.51	-18,839.51	1	0.00	0.00	0.00	0.00	5,545.17	-24,384.68
40000	Alpine Ski House	610.22	610.22	1	0.00	0.00	0.00	0.00	610.22	0.00
C00010	Pabst Brewery	2,047.93	2,047.93	10	377.72	700.56	2,081.78	0.00	0.00	-1,112.00
C00020	Gabby	2,533.59	2,533.59	12	8,446.30	6,782.00	0.00	0.00	1,295.60	-13,990.00
C00030	Ryan Test On Account	-30,838.70	-30,838.70	3	1,247.40	0.00	0.00	0.00	0.00	-32,086.10

AGED BY DUE DATE AS OF 10/06/21

Total (LCY)	-59,159.25
Customer Count	8

Days Outstanding (LCY)

Current	19,577.28
1-30	12,206.02
31-60	2,081.78
61-90	0.00
91 +	7,450.99
Unapplied Credits (LCY)	-100,475.32



# Ability to Send Out All Open Invoices

- Email All Open Invoices with a Single Click
- Attach AR Notes

ynamics 365 Business Central      Sandbox\_Demo

Customer Collections      20000 · Trey Research

AGE BY: Due Date      APPLY TERMS:

Documents | Manage

\* Note   **Send Email**   iPayments   Create Cash Receipt   Apply Credits   Buckets   Formatted Excel   Open in Excel

Document No.	Document Type	External Document No.	Document Date	Due Date	Amount	Remaining Amount	Process Amount	Currency	Remaining Amount LCY	Days Old	Pmt. Discount Date
→ PS-INV103318	Invoice		8/24/2021	9/7/2021	598.82	578.82	578.82		578.82	29	8/24/2021
PS-INV103324	Invoice		8/24/2021	9/7/2021	1,365.84	1,247.36	1,247.36		1,247.36	29	8/24/2021
PS-INV103327	Invoice		8/25/2021	9/8/2021	598.82	398.82	398.82		398.82	28	8/25/2021
PS-INV103328	Invoice		8/25/2021	9/8/2021	1,821.12	771.12	771.12		771.12	28	8/25/2021
PS-INV103381	Invoice		8/23/2021	9/6/2021	100.00	50.00	50.00		50.00	30	8/23/2021



# Bulk Processing

- Run Payments for Multiple Customers at a time

Dynamics 365 Business Central

Sandbox

### Merchant Batch Process Mgr.

Process More options

**Filter**

Merchant: Sample Merchant

Currency: [Blank]

Batch Name: GENERAL

Payment Terms Code: [Blank]

Payment Method Code: [Blank]

Total Amount: 27,215.23

Invoice Count: 12

**DATE RANGE**

Filter By: Due Date

Start Range: 7/2/2021

End Range: 1/20/2022

Customer No.	Customer Name	Document Origin ↑	Document No. ↑	Amount	Remaining Amount	Convenience Fee	Document Date	Due Date	Posting Date	Card Info.
→ 20000	Trey Research	Sales	PS-INV103215	4,203.36	4,203.36	0.00	8/30/2021	9/13/2021	8/30/2021	4XXX-XXXX-XXXX-28
10000	Adatum Corporation	Sales	PS-INV103236	806.02	806.02	0.00	9/9/2021	9/9/2021	9/9/2021	4XXX-XXXX-XXXX-11
10000	Adatum Corporation	Sales	PS-INV103240	1,378.85	1,378.85	0.00	9/14/2021	9/14/2021	9/14/2021	4XXX-XXXX-XXXX-11
30000	School of Fine Art	Sales	PS-INV103241	927.90	927.90	0.00	9/15/2021	9/30/2021	9/15/2021	4XXX-XXXX-XXXX-11
30000	School of Fine Art	Sales	PS-INV103243	2,141.71	2,141.71	0.00	9/15/2021	9/30/2021	9/15/2021	4XXX-XXXX-XXXX-11
30000	School of Fine Art	Sales	PS-INV103250	927.90	927.90	0.00	9/17/2021	9/30/2021	9/17/2021	4XXX-XXXX-XXXX-11





# Automated Reminders with Click to Pay

- Schedule past due reminders to run automatically with click to pay

Dynamics 365 Business Central

Sandbox\_Demo

Collections Plan

## STANDARD

Assign View Log Run Sample Templates More options

**General**

Plan Name STANDARD Last Run Date/Time

Customer Count 2 Enabled Current System Today value. 10/6/2021

**Options**

Balance Threshold 1.00 Filter By Posting Date

Plan Actions Manage

Action Name	Sequence ↑	From Range	To Range	Action	Template Name
→ REMINDER	1	-5	0	Send E-Mail	REMINDER
1-30	2	1	999	Send E-Mail	1 TO 30



# Sales Order Deposits and POS

- Eliminate BC Prepayment Functionality
- Records Real time Customer Ledgers Entries



Dynamics 365 Business Central | Sandbox\_Demo

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Sales Orders: All | Search | + New | Delete | Report | Order | Release | Posting | Print/Send | Navigate | Page | More options

No. ↑	Document Date	Status	Compl... Shipped	Amount Shipped Not Invoiced (\$)	Amount Shipped Not Invoiced (\$) Incl. Tax	Amount	Amount Including Tax	Account/Card#	Deposit	Authorized
S-ORD101067	8/23/2021	Open	No	0.00	0.00	867.20	910.56		910.56	0.00
S-ORD101135	9/24/2021	Open	No	0.00	0.00	0.01	0.01		0.00	0.00
S-ORD101136	9/24/2021	Open	No	0.00	0.00	0.10	0.11		0.22	0.00
S-ORD101138	9/24/2021	Open	No	0.00	0.00	190.10	201.51		100.76	0.00
S-ORD101139	9/24/2021	Open	No	0.00	0.00	433.60	459.62		0.00	0.00
S-ORD101140	10/6/2021	Open	No	0.00	0.00	380.20	406.81	4XXX-XXXX-XXXX-1111	0.00	0.00
S-ORD101142	9/26/2021	Open	No	0.00	0.00	0.05	0.05		0.00	0.00
S-ORD101143	9/27/2021	Open	No	0.00	0.00	0.01	0.01		0.01	0.00
S-ORD101144	9/27/2021	Open	No	0.00	0.00	190.10	199.61		15.00	0.00
S-ORD101145	9/27/2021	Open	No	0.00	0.00	0.05	0.05		0.00	0.00
S-ORD101147	9/27/2021	Open	No	0.00	0.00	190.10	199.61		199.61	0.00
S-ORD101151	9/27/2021	Open	No	0.00	0.00	0.05	0.05		0.05	0.00
S-ORD101152	9/27/2021	Open	No	0.00	0.00	623.70	661.12		250.00	0.00
S-ORD101154	9/27/2021	Open	No	0.00	0.00	433.60	455.28		455.28	0.00
S-ORD101156	9/28/2021	Open	No	0.00	0.00	0.00	0.00		0.00	0.00
S-ORD101157	9/28/2021	Open	No	0.00	0.00	1.00	1.06		0.00	0.00



# Quote to Cash and Order to Cash

- Allow your customers to pay their own quote and order

Dynamics 365 Business Central

Sandbox

Sales Quote

S-QUO1001 · Trey Research

Process Quote Request Approval Print/Send Release Navigate More options

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	Line I
→ Item	1936-S	BERLIN Guest Chair, yellow		10	0	PCS	192.80	CHICAGO, IL	FURNITURE	

Subtotal Excl. Tax (USD) 1,928.00 Total Excl. Tax (USD) 1,928.00

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 96.40

Invoice Discount % 0 Total Incl. Tax (USD) 2,024.40

Invoice Details

Currency Code Shipment Date 8/17/2021 VAT Bus. Posting Group Payment Terms Code 14 DAYS

Payment Service iSolutions Payments Department Code SALES



# Customer Payment Portal

- Allow customers the ability to access invoices and history

