

# Receivables Management

Be closer to your customer

Developed by

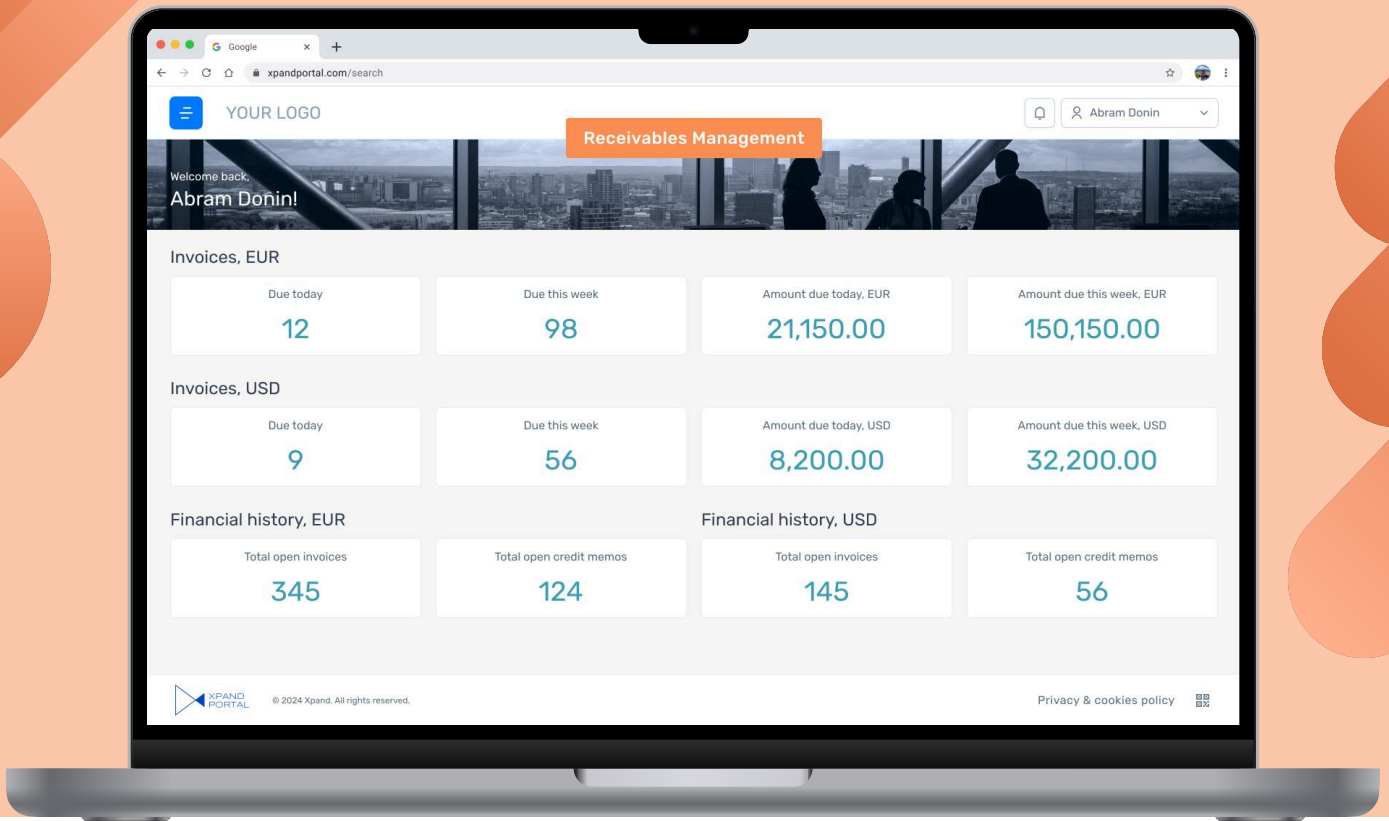


Integrated with



Powered by





## What module solves

9 out of 10 of our customers expressed a desire to simplify their invoicing process. So, we listened, identified recurring patterns, and designed a simple, intuitive interface for the **Receivables Management** module.

No time wasted on customization – within 5-7 days of purchase, you'll be using the ready-to-go module. It reduces routine, manual work for both your and your customers' accounting, finance, or operations teams by minimizing manual processes, supported by helpful built-in automations. It also removes the need for constant back-and-forth communication with clients about open invoices and payments.



# Module and Microsoft Dynamics 365 Business Central

The screenshot displays the 'Receivables Management' module interface. It features a sidebar with filters for document date, due date, document type, and open status. The main area shows a table of financial ledger entries with columns for document date, document type, number, description, amount, and remaining amount. An 'Export to Excel' button is visible above the table. The interface also includes a search bar, a user profile dropdown, and a 'Show results (132)' button.

Document date	Document type	No.	Description	Amount	Remaining amount
30/06/2024	Invoice	234565	Order 949343	50,000.00 USD	12,000.00 USD
30/06/2024	Credit memo	445667	Order 445667	12,000.00 USD	10,000.00 USD
31/07/2024	Invoice	123545	Order 78344	16,000.00 EUR	16,000.00 EUR
12/06/2024	Invoice	987533	Order 101011	8,000.00 USD	2,000.00 USD
16/06/2024	Invoice	475483	Order 475483	4,000.00 USD	4,000.00 USD
17/05/2024	Credit memo	900312	Invoice 123475	49,000.00 USD	12,000.00 USD
05/05/2024	Credit memo	435455	Invoice 94512	12,000.00 EUR	6,000.00 EUR
03/06/2024	Invoice	235455	Order 54839	90,000.00 EUR	32,000.00 EUR
12/06/2024	Credit memo	905043	Invoice 94512	12,000.00 EUR	10,000.00 EUR
30/06/2024	Invoice	345466	Order 345466	5,000.00 EUR	4,000.00 EUR

The module comes with a pre-configured setup, ensuring all necessary settings for Microsoft Dynamics 365 Business Central are already in place, so you can start using it right away without any additional setup. For easy and secure integration with Business Central, we also use our Xpand Portal Connector, designed specifically to connect the products efficiently.

The Receivables Management module will help you fully leverage your Business Central ERP data, increasing its value through our solution. Plus, it securely provides your customers with role-based access to all relevant accounting information.



## Key module functions

- ✦ Invoice sharing
- ✦ Payment tracking
- ✦ Payment reminders
- ✦ Reconciliation
- ✦ Document sharing



## For whom

Businesses seeking to reduce accountant, financial and communication work.



## Facts

### 1 Evolution in line with your growth

This module is the answer to your business's drive for growth and process optimization. It reduces the complexity of managing invoicing communication and gives customers easy access to financial data, improving productivity for both your team and your users, while making cooperation smoother and more transparent.

## 2 Cost-effective standard solution

Packed with essential, pre-built features that accountants and finance managers rely on regularly, the Receivables Management module is quick to implement, allowing you to start working with it almost immediately (up to 5-7 days) and benefit from its well-thought-out functionality.

## 3 More organized account receivables flow

The Receivables Management module allows your external users to track invoices and payments in one place, cutting down on back-and-forth communication and making financial information more accessible.

## Information you may need

🌐 More about us: [www.xpandsoftware.com](http://www.xpandsoftware.com)

✉ Contact us: [info@xpandsoftware.com](mailto:info@xpandsoftware.com)

**Explore all that Xpand Portal has to offer if you're looking for expanded module functionality**

More about Xpand Portal: 🌐 [www.xpandportal.com](http://www.xpandportal.com)

Write us to get free access to demo portal or ask for a demo with our expert: ✉ [bd@xpandsotware.com](mailto:bd@xpandsotware.com)






# Receivables Management

Subscription and Perpetual license models are available. Contact us to learn more about Perpetual license models.

## €90.00/month

Available a few days after purchase

Xpand Portal base app subscription (€499/month) **is required** as the primary setup.\*

-  5 users
-  25 members
-  20 entities, excluding technical
-  20 pages
-  Unlimited localizations

### Plan Highlights

- ✓ Security
- ✓ Full CMS/Configuration from the back-end
- ✓ Emails/SMTP
- ✓ Xpand Portal Connector integration
- ✓ Permissions/member roles
- ✓ Multi-language/localizations
- ✓ Customizable themes
- ✓ Connectors/API
- ✓ SSO
- ✓ Automatic notifications/subscriptions
- ✓ Member activity tracking

\*Buying Xpand Portal base app subscription allows you to choose other available modules:

- Customer Order Management (€135.00/ month)
- Customer Care Management (€165.00/ month) only.