



FACT SHEET



# Clever Payment Plan

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**Clever Payment Plan does what is says on the tin! It takes the pre-payments functionality already standard within Dynamics 365 Business Central and expands it even further so you can offer flexible payment options to your customers.**

Clever Payment Plan makes implementing payment plans easier. By creating or using the default templates, you can simply add them to the required customer card and go.

There are several different triggers that can be added to the templates for the invoices to be generated, based on Dates or Events such as, On Release, First Shipment, Last Shipment or Delivery Date. Not only these but also the trigger can be based on the total Percentage amount of the sales order value or even Fixed Amounts which is particularly useful for customers who place the same orders every time. You can even set different payment terms for orders on payment plans, easily overriding the set terms if required. You don't even need to click a button to assign payment plans, once the template has been created, you could just set the system to auto create payment plans for certain customers on release of sales orders – easy peasy!.

## Benefits

- Easy setup using setup wizards
- Includes default templates using general ledgers to post invoices
- Create invoices based on dates or events, by either percentage of total sales order value or a fixed amount
- Auto-create payment plans on release of a sales order
- New fields and fact boxes on sales order for visibility of assigned payment plan
- Sales invoice and posted sales invoice reporting for payment plan insights
- Ability to exclude invoices from being ran if required
- Ditch manual postings, auto post invoices instead
- Use invoice reversals directly from the payment plans to make creating applied Sales Credit memos easy

## Requirements

Dynamics 365 Business Central



## Increased visibility

With new fields on Business Central sales orders, it's hassle-free to see all the information you need on that one page! Auto create payment plans on release of sales orders and see the payment plan number. A new informative fact box also allows users visibility of what's been posted and how much is left to invoice of the plan.

Edit - Payment Plan - PPLAN093

Manage Create Invoice(s) Page

General

No. PPLAN093 Customer Name Adatum Corp

Payment Plan Template PERCENT G/L Account No. 10200

Sales Order No. 101487 G/L Account Name Income, Product Sales

Customer No. 10000 Creation Date 26/09/2023

Lines Manage Functions Navigate Fewer options

Invoice Type	Description	Value Type	%	Fixed Amount	Invoice Trigger	Invoice Date	Invoice Trigger Type	Payment Terms Code	Exclude from Invoice	Ready to Invoice	Invoice To
→ Staged Payment	50% Staged Payment	%	50.00	1,500.00	Event		Release		<input type="checkbox"/>	<input type="checkbox"/>	
→ Staged Payment	30% Staged Payment	%	30.00	900.00	Event		First Shipment		<input type="checkbox"/>	<input type="checkbox"/>	
→ Closing Invoice	Closing Invoice	%	0.00	600.00	Event		Delivery Date		<input type="checkbox"/>	<input type="checkbox"/>	

Adatum Corporation

Prepare Print/Send Request Approval Invoice Actions Related Automate

Adatum Corporation 06/09/2023 06/09/2023 16/09/2023 Open

Line Fewer options

No.	Description	Quantity	Unit Price Excl. VAT	Line Amount Excl. VAT
Shipment No. 102713:				
1896-S	ATHENS Desk	1	1,500.00	1,500.00
1900-S	PARIS Guest Chair, black	1	1,000.00	1,000.00
Payment Plan Invoices :				
10200	50% Staged Payment	1	-1,250.00	-1,250.00
10200	30% Staged Payment	1	-750.00	-750.00
500.00 Total Excl. VAT (GBP) 500.00				
0.00 Total VAT (GBP)				
0 Total Incl. VAT (GBP)				

## Invoice automation

For even further flexibility and to keep an eye on problematic payers, you can exclude invoices from being sent out so you only schedule to send the invoices you want paying. It's also possible to schedule invoice creation via job queues so you can just set up and leave it to automatically send out customer invoices.

### Payment Plan Summary

Payment Plan Template	PERCENT
No.	PPLAN093
Payment Plan Amount	3,000.00
Closing Amount	600.00
Invoiced Amount	1,500.00
No. of Invoices	0
No. of Posted Invoices	1
No. of Credit Memos	0
No. of Posted Credit Memos	0

## Easy reporting

It's straightforward to gather reporting of payment plans too. Using new list pages, you can see data on sales invoices and posted sales invoices created by using payment plans. required.

Payment Plan Templates

Search + New Manage Template Setup Wizard More options

Code ↑	Description	G/L Account No.	G/L Account Name	Status
PERCENT	3 Stage % Events Invoices	10200	Income, Product Sales	Active
RETAIL	3 staged Fixed	10200	Income, Product Sales	Active



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