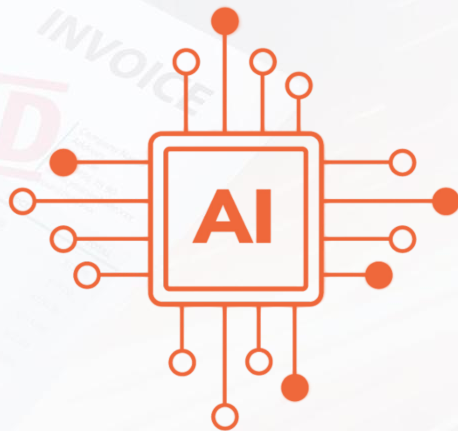


CHASER

How AI is transforming accounts receivable for Dynamics users



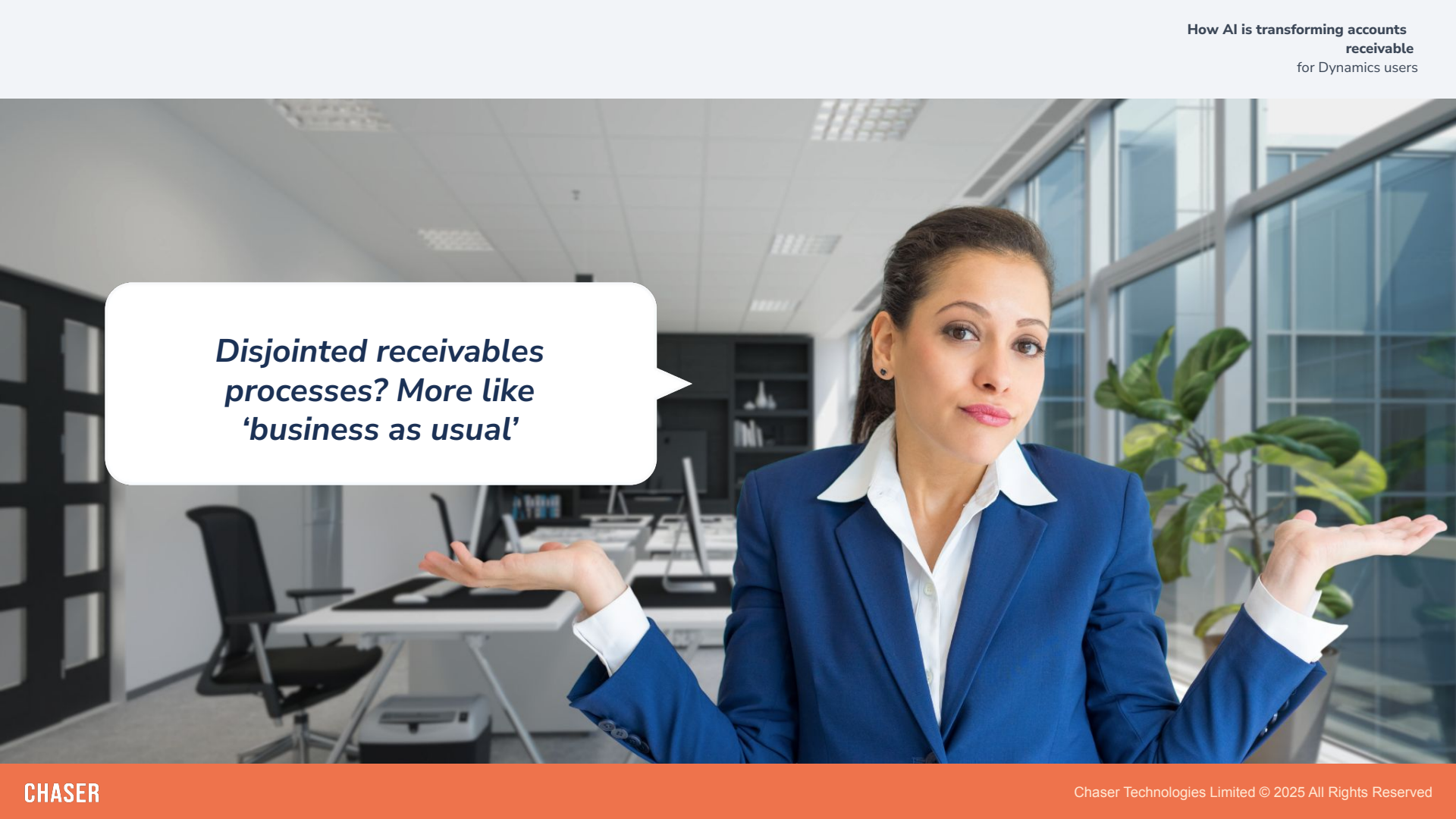
Amaya Woods
Head of Marketing
Chaser



Amaya Woods

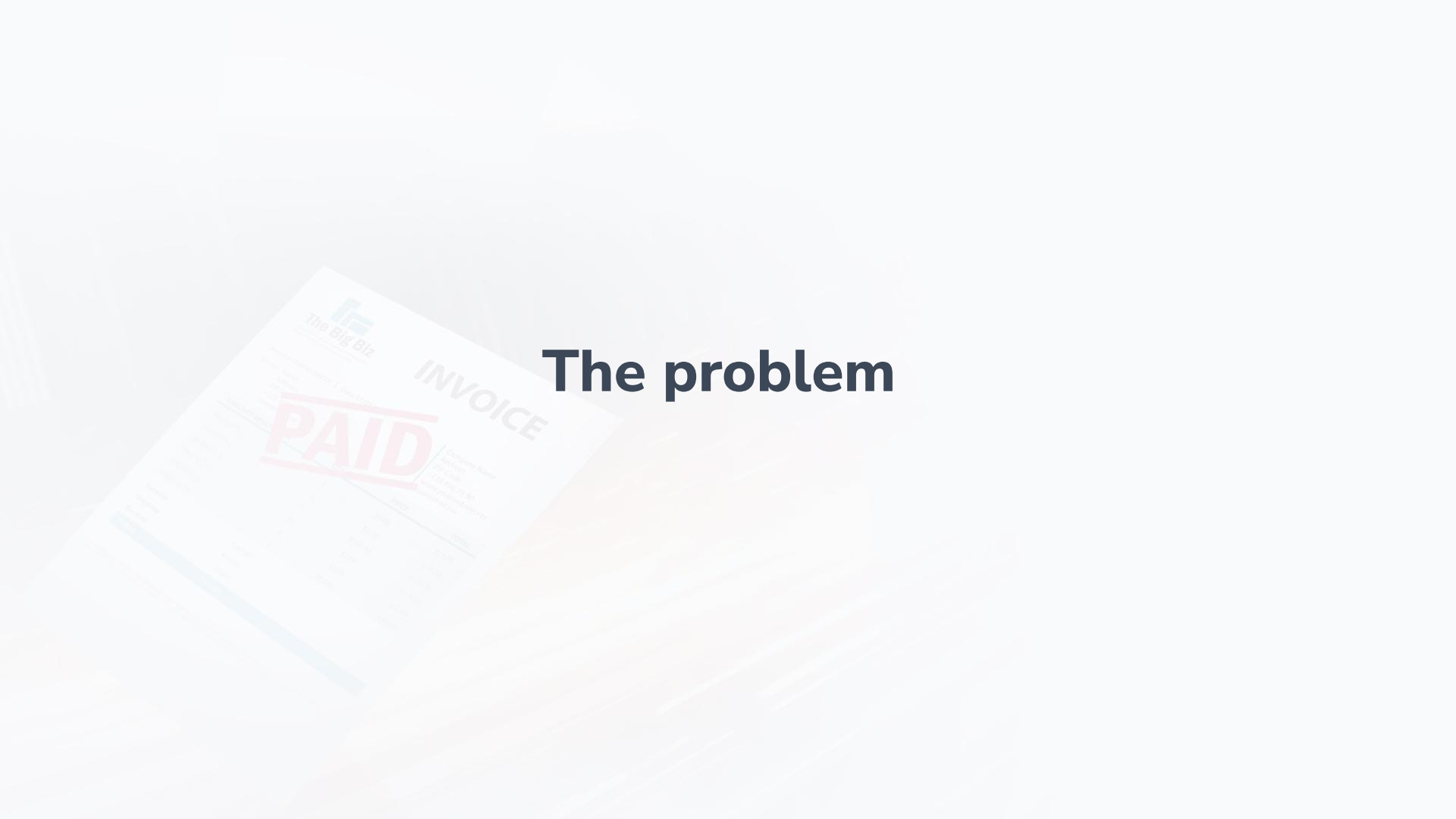
Head of Marketing
Chaser

- 6 years researching and communicating businesses' accounts receivable pain points
- Ran The 2022 late payment report, assessing receivables approaches at 400+ businesses
- Speaker at UK government's Prompt Payment and Cash Flow Review Technology Roundtable



*Disjointed receivables
processes? More like
'business as usual'*

The problem



Why is it a problem?

How AI is transforming accounts
receivable
for Dynamics users



14 hours

Spent on manual receivables tasks every
week by mid-sized businesses (Intuit)

Why is it a problem?

How AI is transforming accounts
receivable
for Dynamics users



\$300,000

Currently owed to the average mid-sized
business in North America (Intuit)



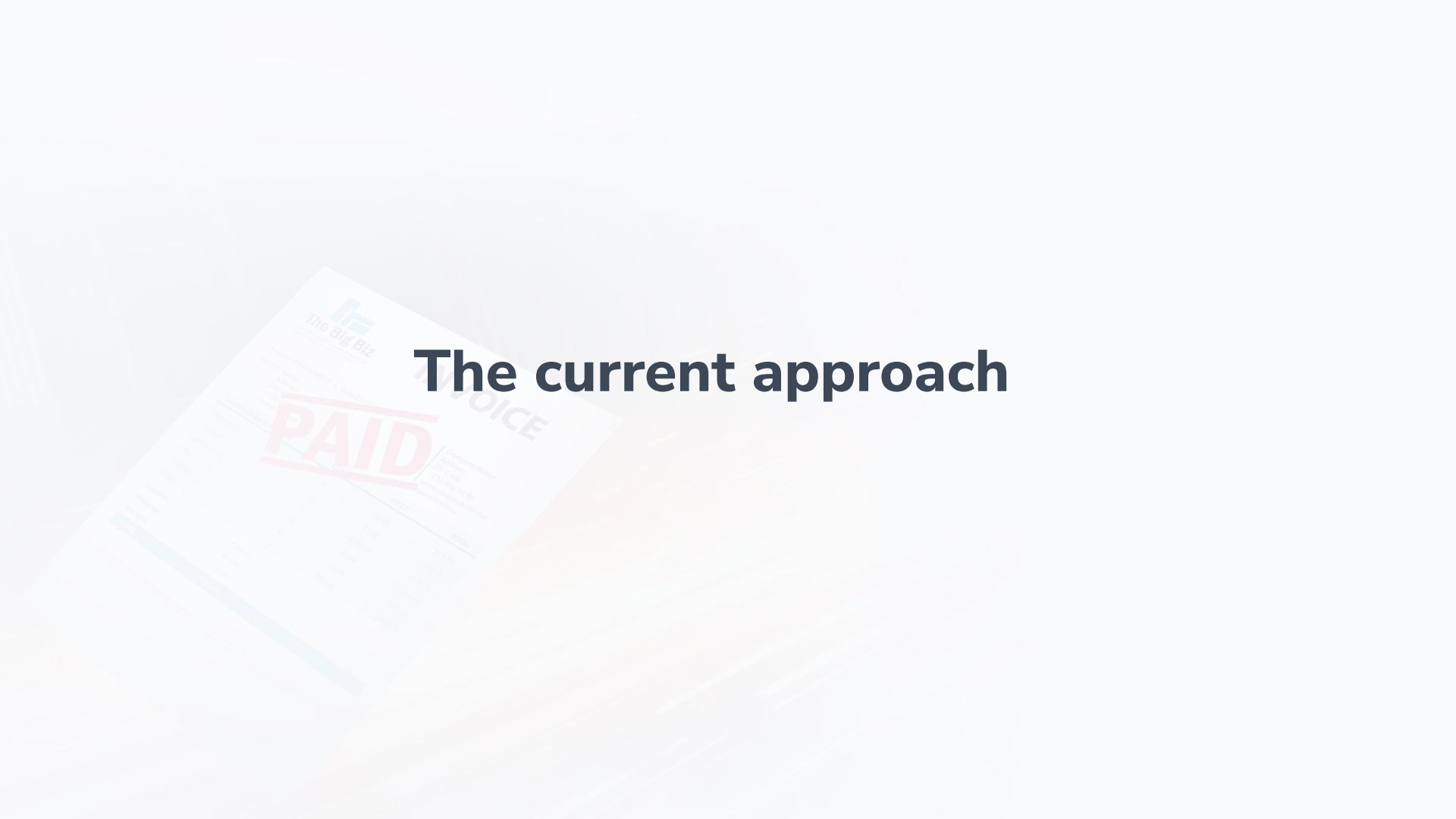
Most businesses are still relying on...

Manual processes

Disconnected systems

Inconsistent follow-ups

The current approach



We use accounts receivable
automation software!

83

% of businesses say they are already
using an automation software to
manage their accounts receivables

But what 'AR software' are they using?

(Business Central, QuickBooks,
Sage etc.)



ERP or accounting software is not accounts receivable automation software

How AI is transforming accounts
receivable
for Dynamics users

Search + New Edit List Delete Levels Actions Automate Fewer options							
Code ↑	Description	Max. No. of Reminders	Post Interest	Post Additio... Fee	Post Add. Fee per Line	Minimum Amount (LCY)	Note About Line Fee on Report
→ NEW	New Customers	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00	
DOMESTIC	Domestic Customers	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00	
FOREIGN	Foreign Customers	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00	
SPC	Customer - SP	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00	
TEST	Test	6	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0.00	

This isn't enough to prevent late payments and manage receivables efficiently



Payment request

[Automated looking email]

[Payment link]

ERP or accounting software is not accounts receivable automation software

How AI is transforming accounts
receivable
for Dynamics users



10+ hours

Spent every week on manual accounts receivables management tasks

87%

Say they are typically paid after their invoice due date

ERP or accounting software is not accounts receivable automation software

How AI is transforming accounts
receivable
for Dynamics users



- ⚠ Data stored in spreadsheets
- ⚠ Writing-off uncollectible debts
- ⚠ Over-stretched finance team
- ⚠ Human errors
- ⚠ Poor visibility over debtors
- ⚠ No communications tracking

ERP or accounting software is not accounts receivable automation software

How AI is transforming accounts
receivable
for Dynamics users



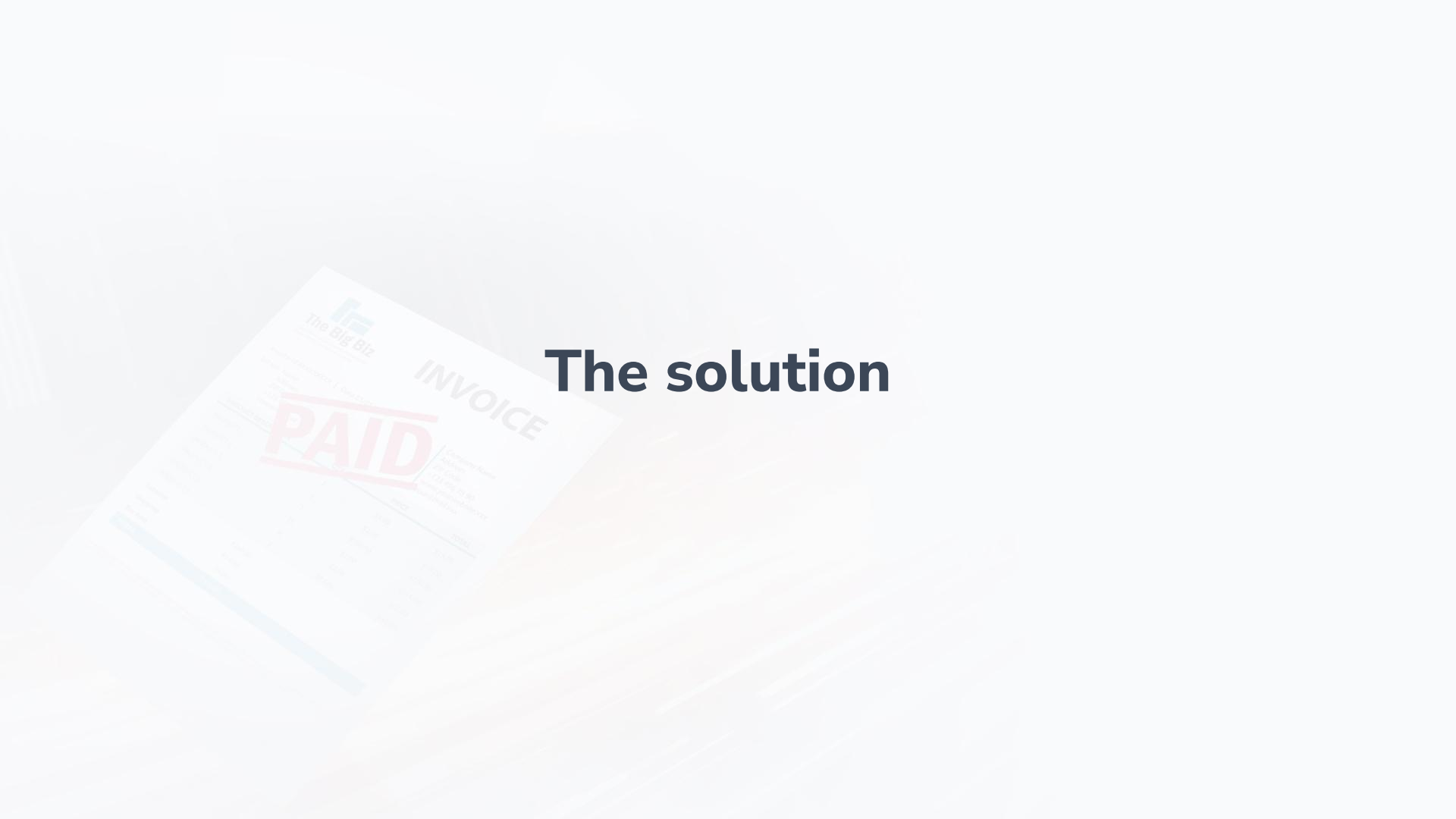
Cost-effective solutions using AI and automation are available to help you

Achieve efficiency

Predict where late payments are likely to arise

And prevent them in their tracks

The solution



YOU can change the way businesses manage accounts receivable

Put an end to the painful admin, spreadsheets, and
time-consuming processes holding them back



Chaos and admin

~~—Chaos and admin—~~

Clarity and control

3 **×** More likely to be paid before your invoice due date, when you implement AI and automation



We **reduced** our manufacturing clients' **days sales outstanding** by **over 75%** with Chaser

- Chloe, Virtual Finance Team Manager, SAS Accountants



We save **at least 15 hours a week** - and that's me being stingy!

- Rossana, Credit Control Manager, Love Brands



We **Recovered \$20,000 in old debts** that would have otherwise been written-off

- Tom Hays, Head of Finance, Huttie Group

Instantly calculate your ROI

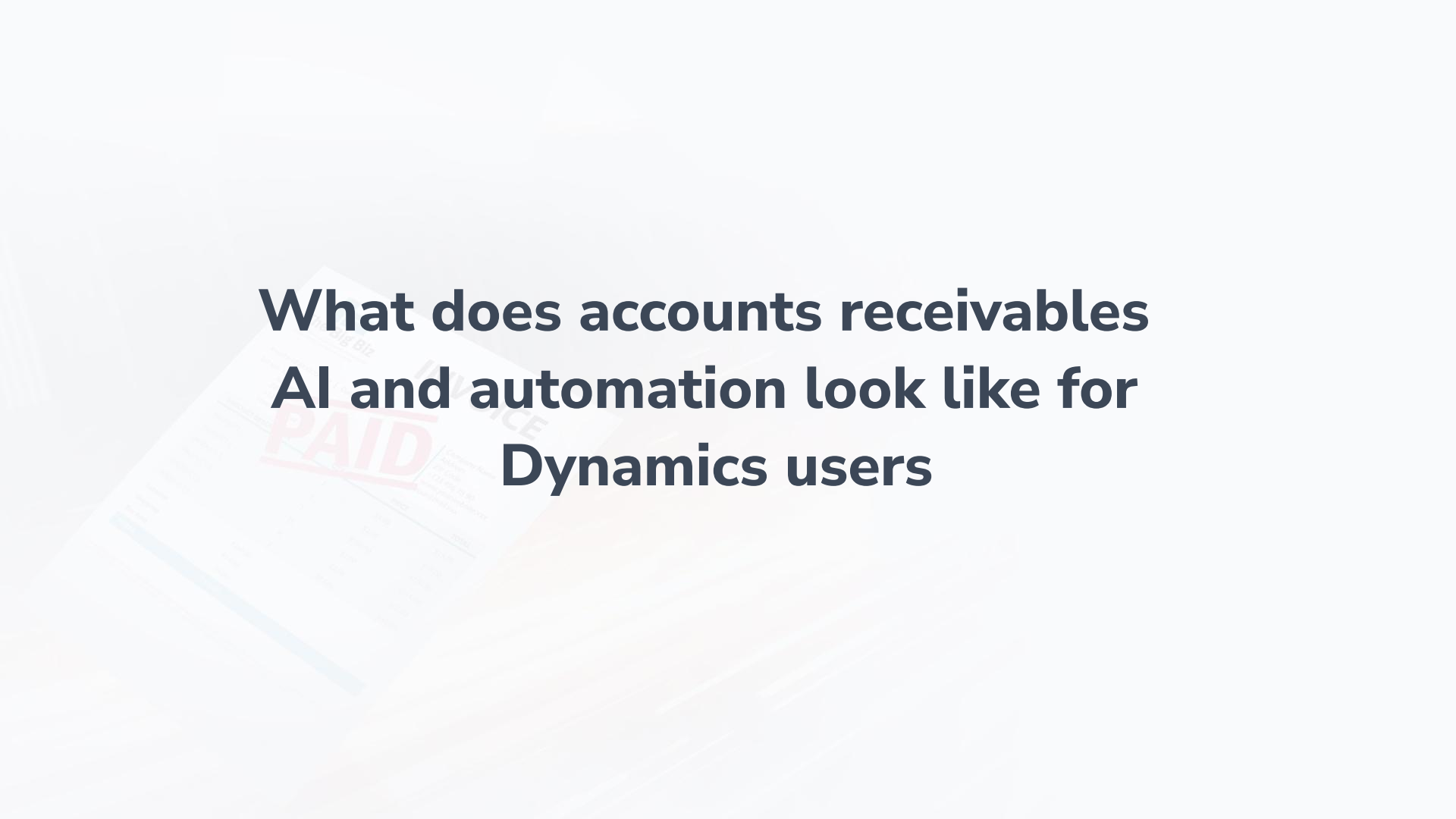


Find out how much you will save with Chaser

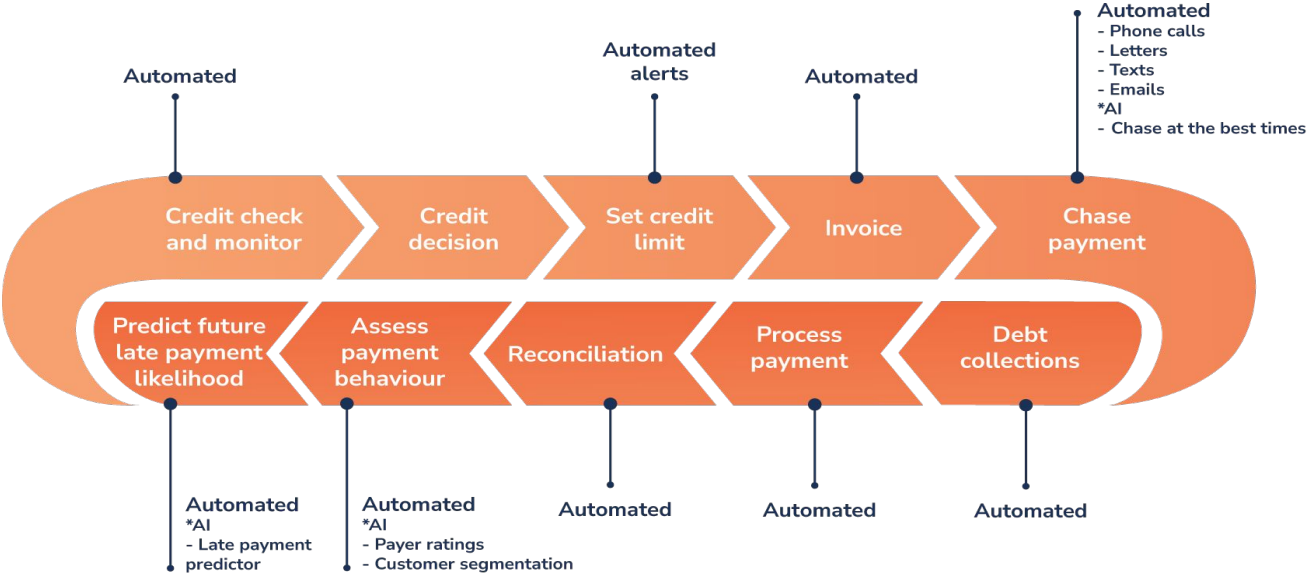
Average monthly invoices raised ⓘ	Salary of staff member managing AR ⓘ	Current DSO ⓘ	Annual revenue ⓘ	Estimated unrecoverable debts ⓘ
20 - 5000 invoices	\$25K - \$500K	30 - 400 days	\$250K - \$10M	0 - 100 %
20 invoices	\$25,000	44 days	\$1,000,000	2 %

Your return on investment with Chaser

Calculation confidence	1-year savings ⓘ
Conservative <input type="radio"/>	\$16K
Average <input checked="" type="radio"/>	
High <input type="radio"/>	
	Monthly cost of delay ⓘ
	\$1.4K
	Time saved each month
	9.78 hours
	Estimate DSO
	24.20



What does accounts receivables AI and automation look like for Dynamics users



CHASERCharlotte API demo USA

Sync now

Dashboard

Receivables

Collections

Reports

Manage

CustomersInvoices

Search by customer name or invoice number

Export

RiskFilter

18 customers

Items per page:50

1 of 1

<input type="checkbox"/>	Customer	Payer rating	Overdue	Outstanding	Schedule	Oldest debt (days)	Avg days to pay	% of total	Credit lin
<input type="checkbox"/>	Waters LLC	N/A	\$10,672	\$10,672	Storm 3	858	-	34.8%	
<input type="checkbox"/>	Weimann, Boyle and O...	N/A	\$9,338	\$9,338	Storm 2	858	-	30.4%	
<input type="checkbox"/>	Kautzer - Kihn	Average	\$5,336	\$5,336	Good Payers	858	-	17.4%	
<input type="checkbox"/>	Jacobs, Murazik and ...	Bad	\$2,668	\$2,668	Good Payers	858	-	8.7%	
<input type="checkbox"/>	Bahringer Group	N/A	\$1,334	\$1,334	Good Payers	493	-	4.3%	
<input type="checkbox"/>	Sawayn, Towne and WL...	N/A	\$1,334	\$1,334	Good Payers	505	-	4.3%	
<input type="checkbox"/>	Bode, Will and Veum	N/A	\$0	\$0	Good Payers	-	-	0%	
<input type="checkbox"/>	Bogan - Beatty	N/A	\$0	\$0	Good Payers	-	-	0%	
<input type="checkbox"/>	Wolf - Lebsack	N/A	\$0	\$0	Good Payers	-	-	0%	
<input type="checkbox"/>	Veum, Stark and DuBu...	N/A	\$0	\$0	Good Payers	-	-	0%	
<input type="checkbox"/>	Chase	N/A	\$0	\$0	Good Payers	-	-	0%	

CHASER

Chaser Demo Limited

Sync now

Dashboard

Receivables

Chaser Pay

Collections

Credit Check

Reports

Manage

Receivables

Mitchell Johnson

+ Add Note

Chase now

Register call

View statement

Primary contact

Mitchell Johnson

Phone

Mobile

Address

10D Overbury Road London Harringay Warehouse District N156RH

Payment Portal link

Mitchell Johnson

Payer rating

Average

Credit Score

Get credit report

Chasing status

Not Chasing

Schedule

Bad payers

Outstanding

\$8,640

Overdue

\$5,760

Credit limit

Edit

\$15,000

History

Invoices

Collection details

Payment Portal

Credit Report

Recipients

All events

Showing 50 of 83 events

Expand all

May 2024

Note

By Declan Tobin

Mitchell Johnson

MON, 13 MAY, 10:38 AM

Chase 1

To: Mitchell Johnson

Chaser Demo Limited - Polite reminder for Invoice INV-1699 Mitchell Johnson

TUE, 7 MAY, 10:06 AM

Monthly statement

To: Mitchell Johnson

Chaser Demo Limited : Monthly statement for Mitchell Johnson

FRI, 3 MAY, 4:02 PM

April 2024

76% DSO reduction
for early-adopters of Payer ratings

History

Invoices

Collection details

Payment Portal

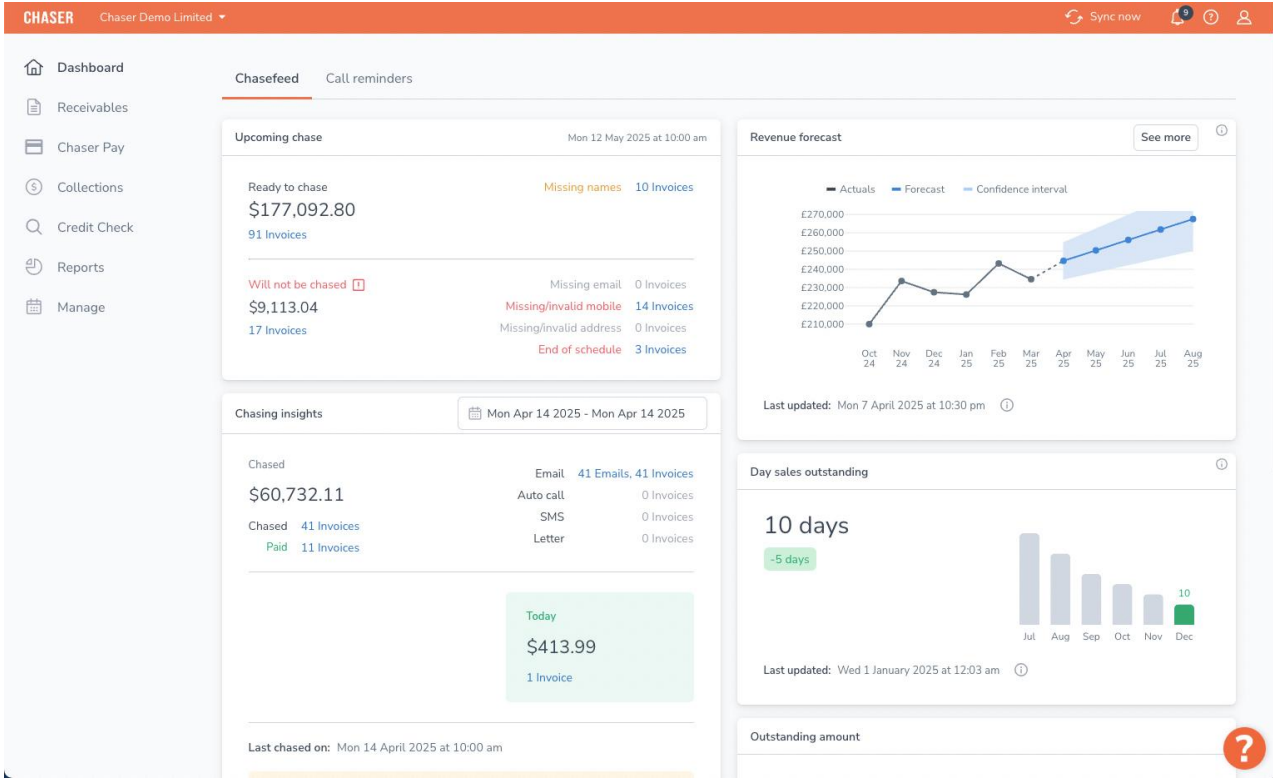
Credit Report

Recipients

< 1 / 1 >

Results: 3

<input type="checkbox"/>	Invoice No	Due	Outstanding	Predictor	Next Chase	Expected	Invoice Status
<input type="checkbox"/>	INV-1604	7 May 2024 6 days	\$216	-	in 15 hours 2: Early over...	-	Chasing
<input type="checkbox"/>	INV-1746	6 Jun 2024 24 days until due	\$216	High	in 2 weeks 1: Before due	-	Chasing
<input type="checkbox"/>	INV-1711	30 May 2024 17 days until due	\$192	High	in 8 days 1: Before due	-	Chasing



CHASER

Chaser Demo Limited

Sync now

9

Dashboard

Receivables

Chaser Pay

Collections

Credit Check

Reports

Manage

General

Templates

Schedules

Email

Timings

Payment Portal

New Schedule

Bad payers

38 Customers

Default

12 Emails

3 Auto-calls

4 Call reminders

Edit

Direct Debit/Monthly Statements

1 Customer

1 Monthly statement

Edit

Do not chase/Holding

1 Customer

Edit

Query/Disputes

2 Customers

Edit

Debts collection

1 Customer

2 Auto-calls

Edit

Bad debts/Write offs

0 Customers

Edit

Emails + SMS Chasing

6 Customers

8 Emails

3 SMS

1 Call reminder

1 Monthly statement

Edit

Good payers

2 Customers

8 Emails

1 Auto-call

2 Call reminders

1 Monthly statement

Edit

More information on our knowledgebase: [Schedules](#)

CHASER

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CHASER

Chaser Demo Limited

Sync now

9

?

Dashboard

Receivables

Chaser Pay

Collections

Credit Check

Reports

Manage

General

Templates

Schedules

Email

Timings

Payment Portal

Bad payers

Default

Workflow

Monthly statement

12 Emails, 3 Auto-calls, 4 Call reminders

Before Due

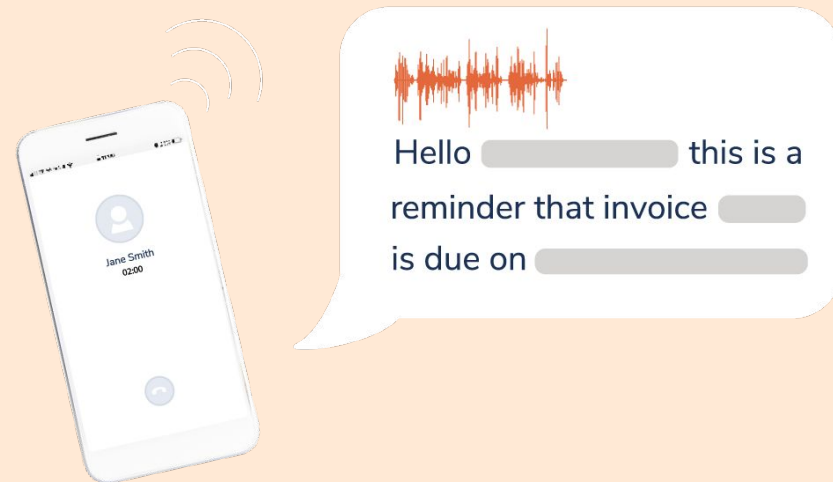
Email	-14d	Single template Before due	Multi template No template	Senders Normal	Recipients Normal
Email	-1d	Single template Before due	Multi template Before due - MULTI	Senders Normal	Recipients Normal

Overdue

Email	1d	Single template Early overdue	Multi template Early Overdue - MULTI	Senders Normal	Recipients Normal
Call reminder	2d	Assignee Manfredi Pelitteri	Minimum overdue £100		
Auto-call	5d	Single template Auto-call overdue	Multi template Auto-call overdue multiple		
Email	6d	Single template Early overdue	Multi template Early Overdue - MULTI	Senders Normal	Recipients Normal
Auto-call	9d	Single template Auto-call overdue	Multi template Auto-call overdue multiple		

Auto-call

Deliver pre-scripted payment
reminder calls to debtors



SMS payment reminder

Get invoice reminders seen
instantly via text

Outstanding		Paid		
<input checked="" type="checkbox"/>	No.	Due Date	Status	Outstanding
<input checked="" type="checkbox"/>	INV-452	22 Dec 2022	858 days overdue	\$1,000 <div><input type="radio"/> Pay now</div>
<input checked="" type="checkbox"/>	INV-234	22 Dec 2022	858 days overdue	\$1,000 <div><input type="radio"/> Pay now</div>

2 invoices

\$2,000


Total

\$2,000

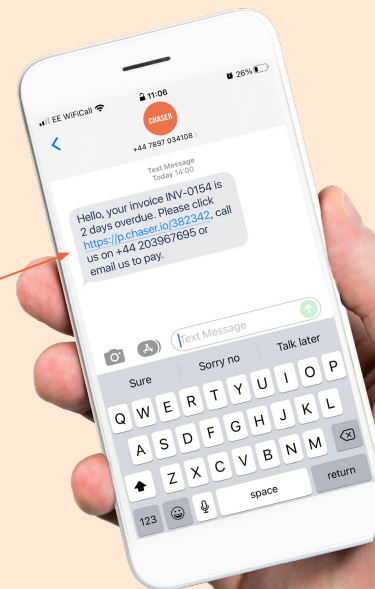
Contacts

Email: support@chaser.io

CANADA EX



Automate your collections



Letters

Schedule payment reminder letters
to your debtors in the post

Charlotte API demo USA statement

Jacobs, Murazik and Howell

Download statement

Outstanding	Paid			
No.	Due Date	Status	Outstanding	
INV-452	22 Dec 2022	858 days overdue	\$1,000	Pay now
INV-234	22 Dec 2022	858 days overdue	\$1,000	Pay now

Summary

2 invoices \$2,000

Total \$2,000

Pay now

See bank transfer information

Contacts

Email: support@chaser.io

CANADA EX

CHASER

Chaser Demo Limited
Capital Office
124-128 City Road
London
United Kingdom
EC1V 2NX

28/04/2025

Dear John

I hope this message finds you well. I'm writing to address an outstanding invoice of \$15 that has remained unpaid since 1 January 2021. Despite our previous reminders, the payment has not been made. To assist you in reviewing your outstanding balance, please scan the QR code.



We understand that unforeseen circumstances may lead to delays in settling invoices. However, prompt and collaborative action is essential to finding a mutually beneficial resolution.

Should you have any questions or require assistance regarding the invoice, please don't hesitate to contact me directly at sender@chaser.com. I am confident that we can work together to address this matter effectively.

Please be advised that if the outstanding payment is not received or if we are unable to establish communication to resolve this issue, we may need to take further steps to recover the debt.

Thank you for your immediate attention to this matter. We appreciate your cooperation and look forward to resolving this issue promptly.

Sincerely,
Chaser Demo Limited
Jane Smith

Automation and AI in accounts receivable

How AI is transforming accounts
receivable
for Dynamics users

CHASERChaser Demo Limited

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Payment Portal

Bad payers

Default

Workflow

Monthly statement

12 Emails, 3 Auto-calls, 4 Call reminders

Before Due

Email

-14d

Single template
Before.due

Multi template
No template

Senders
Normal

Recipients
Normal

Email

-1d

Single template
Before.due

Multi template
Before.due - MULTI

Senders
Normal

Recipients
Normal

Overdue

Email

1d

Single template
Early.overdue

Multi template
Early.Overdue - MULTI

Senders
Normal

Recipients
Normal

Call reminder

2d

Assignee
Manfredi Pelitteri

Minimum overdue
£100

Auto-call

5d

Single template
Auto-call.overdue

Multi template
Auto-call.overdue multiple

Email

6d

Single template
Early.Overdue

Multi template
Early.Overdue - MULTI

Senders
Normal

Recipients
Normal

Auto-call

9d

Single template
Auto-call.overdue

Multi template
Auto-call.overdue multiple

Before due

Preview

Save template

Subject

Friendly reminder - <our_name> - Invoice <invoice_refnum>

Hi <recipient_firstname>.

This is a friendly reminder that invoice <invoice_refnum>, for <invoice_amount_owed>, will be due for payment by <date_due>.

I'd appreciate if you could confirm that everything is on track for payment.

You can check your invoices here: <payment_portal_link>

Kindest regards,

<sender_firstname>
<our_name>

Placeholders

Our name

Customer: Name

Customer: Account number

Recipient: First name

Recipient: Surname

Recipient: Full name

Sender: First name

Sender: Full name

Customer: Payment Portal

Due date

☒ Attach copy invoice

☒ Attach customer statement

Date format

d MMMM yyyy

Preview: Thanks for paying

Chaser Demo Limited: invoice INV-001 - Payment Received

Hi John,

Thank you very much for the recent payment of invoice INV-001.

If you need an up-to-date statement for your account, you can find all your invoices detailed here: ([Payment Portal Link])

Kindest regards,

Jane

amaya.woods@chaserhq.com

Send test email

Close

CHASER

Chaser Demo Limited

Sync now

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Chaser Pay

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Reports

Manage

General

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Schedules

Email

Timings

Payment Portal

Chasing times

Save

Time zone

Europe/London

Recommended: Mondays at 7:00 AM and Thursdays at 9:00 AM

☐ Mondays

10:00 AM

☒ Tuesdays

7:00 AM

☐ Wednesdays

10:00 AM

☐ Thursdays

10:00 AM

☐ Fridays

10:00 AM

☐ Saturdays

10:00 AM

☐ Sundays

10:00 AM

Monthly statement and thanks for paying

4:00 PM

☐ Chase on public holidays

The recommended time predicts the best time to chase your customers to increase your chance of a prompt payment or response and is generated using a machine learning model.

How does this work with Dynamics?

How AI is transforming accounts
receivable
for Dynamics users

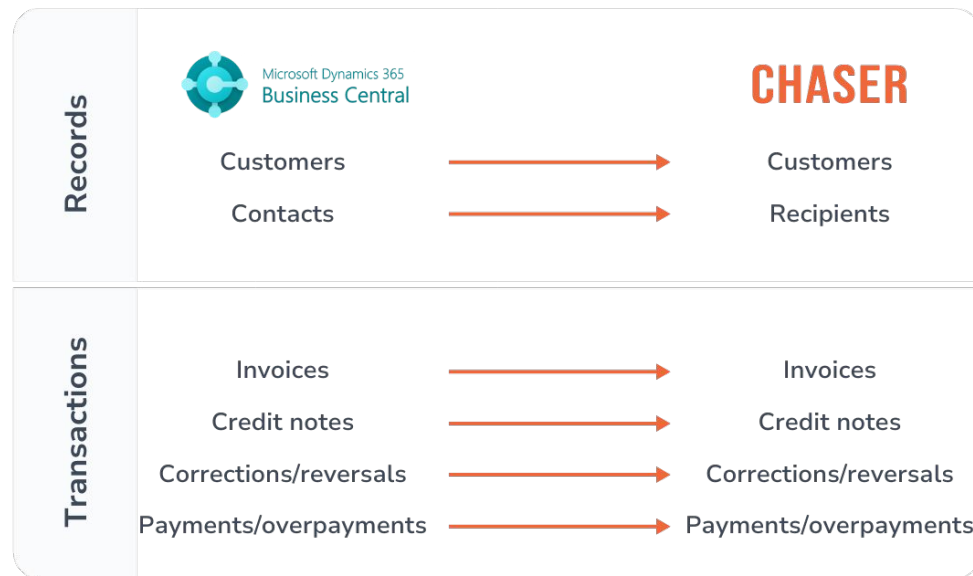
Direct integration

Code-free, instant connection

1-4 hours setup time

Security details

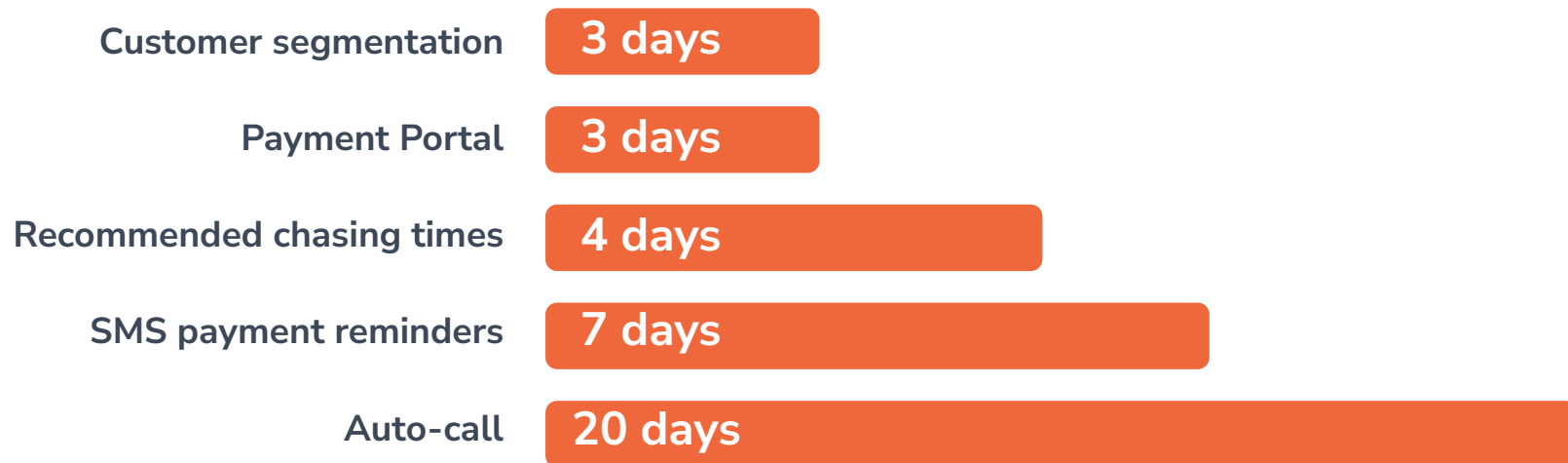
- OAuth 2.0
- SOC 2 Type II compliant





The background of the slide features a faded, tilted image of a business invoice. A large, red, 3D-style 'PAID' stamp is prominently placed over the top left portion of the invoice. The invoice itself contains a table with columns for 'ITEM', 'QTY', 'UNIT PRICE', and 'TOTAL'. The text 'INVOICE' is visible in the upper right area of the document. The overall image is semi-transparent, allowing the text overlay to be clearly legible.

Results of AI and automation in accounts receivable



Business supplies and equipment industry

☆☆☆
Enterprise

14 hours saved a month

3 hours saved a week

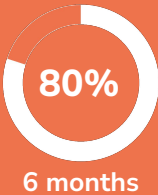
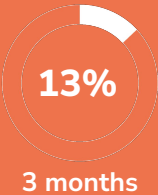
101 \$30M USD
Annual revenue

\$30M USD
Amount paid

97
Proportion of amount paid to issued



DSO reduction



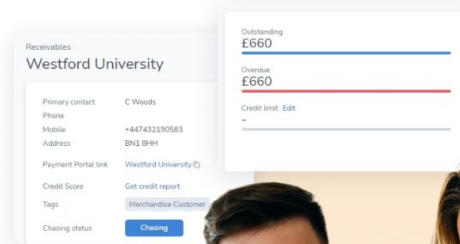
This organisation is in the Business Supplies and Equipment industry. And is currently saving 149 hours each month on tasks they previously did manually. Within the first 6 months, they saw their days sales outstanding reduce by over 80%. And have already successfully got \$30 million dollars paid using Chaser



**Managing our accounts
receivable is so easy now!**

Chaser helps Dynamics users track,
automate, and optimize the receivables
process

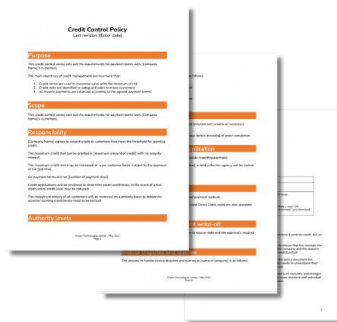
Using AI and automation, that's seamlessly
connected to your Business Central



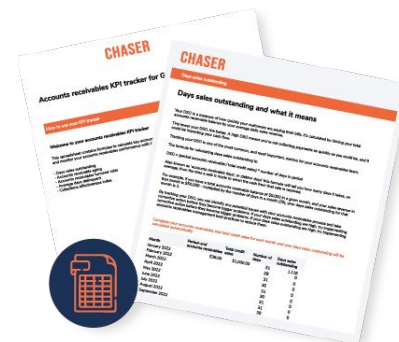
40 polite templates to get invoices paid



Download your credit policy template



Accounts receivable KPI tracker



Visit us

Stand 602

Speak to an expert

