

Integrated Collection Solution

Solution Overview

Collection Intelligence is an AI-powered virtual reporting assistant in Teams that delivers an on-demand “One Customer View” of a customer’s credit and payment standing. It replaces hours of manual data gathering with a curated, validated report and direct links into D365.

Business Use Case

Global Collections is responsible for forming a complete, accurate view of a customer’s trade receivable position. Key signals—aging, disputes, holds/flags, financing exposure, and pipeline context—are spread across multiple systems, requiring hours of manual preparation and coordination before customer reviews. This leads to inconsistent narratives, delayed decisions, and risk of missed credit or compliance issues.

Benefits

- **Speed to Data:** Reduces customer prep time from 1-2 hours to minutes while improving efficiency and quality of customer engagements
- **Risk Reduction:** Improves consistency in interpreting financial exposure
- **Decision Quality:** Enables faster, data-driven decisions during volatility
- **User Experience:** Role-based insights tailored to treasury stakeholders
- **Strategic Impact:** Positions treasury as proactive vs reactive

Key Results

12K hours

Annual time savings

Technology

- Dynamic 365
- Copilot Studio
- Fabric Data Agent

Time taken

Launched in 3 months