# Collections Management Release Notes

Release: 25.1.4 - November 2026

## Versions: 25.1.4

### Microsoft Dynamics GP 18.9.1995

**Do not install into a Live environment if there are outstanding issues.**

**About this document:**

It is assumed that you are familiar with the Dynamics GP and SQL Server environments.

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# Release Details – Microsoft Dynamics GP

## Version Details

| Development Tool | Dexterity |
|---|---|
| Supported Platforms | SQL Server 2014<br>SQL Server 2016<br>SQL Server 2017<br>SQL Server 2019<br>SQL Server 2022 |
| Release | 25.1.4 |
| Release Date | November 2026 |
| Dynamics GP Version | 18.9.1995 |
| Product Version | 18.0b1255 |
| Product Name | Collections Management |
| Product ID | 1157 |
| Main Dictionary | CPRO.DIC |
| Reports Dictionary | R1157.DIC |
| Forms Dictionary | F1157.DIC |

# Installation and Setup

**What you require before you can install the application:**

- CM and CDA Setup.exe Installer file.
- Installation instructions.
- Access to Server or computers that need installation.

**Prior to the installation, ensure a recent backup of the Dynamics GP databases has been taken.**

**Follow the installation instructions below:**

1. Run the CM and CDA Setup application file.
   - To Ensure you have proper permissions to run the file, log into the workstation as a local administrator.
   - Right-click the GP application shortcut and select ‘Run as administrator.
2. Click Next to begin the installation.
3. Carefully read the License Agreement, highlight Accept, and click Next.



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4. The registry will be used to default the GP code folder. However, you can use the Browse button to navigate to the location of the GP code folder you would like to install Collections Management.
5. Click Next.
6. Select all the desired components you would like deployed. The individual files included are listed below:
   - Collections Management Application.
     - The code (.cnk file) will be placed at the root of the GP code folder.
     - Store procedure files (.dat and .idx files) will be placed within the Data subfolder.
   - Collections Management Help File.
     - The Online Help file (.chm file) will be placed at the root of the GP code folder.
   - Collections Management Sample Files (all are placed within the Data subfolder)
     - Sample files deployed for Sample data (.csv files)
     - Collector performance sample file (.xlsx file)
   - Collections Management Documentation (all are placed within the Documentation folder)
   - This document (Release notes)
     - Collections Management Manual
       - Collections Management Table Reference
       - Introduction to Collection Plan Processing
   - Collections Management Sample SSRS Report (all are placed within the SQL subfolder)
     - AgingDetails.zip will contain all necessary files and documentation to configure the sample SSRS Report.
   - Collections Management Integration Tools (all are placed within the Documentation subfolder inside the CM-SDK folder.
     - All files and documentation related to the tools available for integrating with Collections Management.
7. Once the installer has finished, you will need to launch GP.
   - Ensure that you launch GP by right-clicking on the icon and clicking Run as administrator. Depending on your version of Windows, and how User Account Control has been configured, you may need local administrator permissions.
8. Click Yes when prompted to include new code.
9. Log Into Dynamics GP:
10. Open the Collections Management Installation and Registration window. (Microsoft Dynamics GP >> Tools >> Utilities >> Sales >> Collection Installation and Registration)
11. Click the Create/Upgrade Tables button. This will create all of the Collections Management tables if the product has never been installed before. Otherwise, it will upgrade all of the tables.
12. Enter a valid Registration Key and Expiration Date in their respective fields. This must be done in order for the Install Stored Procedures button to be actionable. “Valid” or “Invalid” will be displayed next to the Registration Key.



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13. Click the Install Stored Procedures button. This will install the CNPROCS.dat and CNPROCS.idx files. These files must be in your Data folder. If they are not in this location, when clicking this button, you will receive a message prompting you to place these two files in the Data folder.
14. Click the Create/Upgrade SmartLists button. If the default Collections Management Smartlist is already found you will be prompted to Upgrade or Replace. If you would like to retain any modifications you have made, ensure that Upgrade is selected.

**Additional workstation installation instructions:**

1. Run the installer on each additional workstation that will be using Collections Management.
2. Launch GP and choose “Yes” when asked if you want to include new code.

# New in this release

| ID Number | Description | Page No. |
|---|---|---|
| **25.1.4** | November 2026 | |
| **61370 Enhancement** | Improved Collection Plan Processing performance when emailing invoices that use Microsoft Word templates. Collections Management now closes Word only if Collections Management opened it, which removes repeated Word start-up and shut-down while invoices are generated for each customer. | |
| **65941 Enhancement** | Product registration for Collections Management now uses **registration.professionaladvantage.com**. If your organization restricts outbound internet traffic by host name, add registration.professionaladvantage.com to your firewall allow list. | |
| **59064 Bug** | Fixed the **Exclude Documents on a Non-None Note from Oldest Calculation** option in the Collections Management Setup window. When this option is marked, documents attached to a Dispute, Promise to Pay, or Special note are now correctly excluded when Collections Management determines a customer's oldest document. Documents that aren't attached to any note are now included. A customer's Collection Plan step is now based on the correct document. | |
| **59172 Bug** | Fixed an issue where an email could include a blank SOP invoice attachment (for example, InvoicesFor<Customer>.pdf) when the selected invoice attachment option, such as Overdue Only, found no matching documents. Invoices selected for a previous email are now cleared before each run, so an invoice is attached only when matching documents exist. | |
| **61373 Bug** | Fixed the error "Wrong number of parameters sent to script 'ASI_SOP_DP_Print_Forms_2024'". The error occurred when invoices that use a Forms Printer template were attached from the E-Mail window, collection letters, or Collection Plan Processing. Collections Management now calls Forms Printer based on the installed Microsoft Dynamics GP build.<br>*Note:* Dynamics GP 18.7 Year-End (18.7.1765) and later requires Forms Printer build 176 or later. | |
| **25.1.3** | | |
| **54679 Bug** | Resolved duplicate/blank attachment when sending Collections emails with Forms Printer | |
| **25.1.2** | | |



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| **52488**<br>**Bug** | Fixed: Error "An open operation on table RM_StatementTemp has caused an unknown error (46)" when processing statements for more than ~100 customers<br><br>Affected Area<br>Collection Management Plan Processing window (statement email generation) – Receivables Management (RM) | |
| **25.1.1** | | |
| 2590<br>**Enhancement** | The note creation logic has been updated to include an explicit warning when an email cannot be sent due to a missing email address. The note now appends a clear status message, such as:<br><br>**Warning:** Customer [Customer Name] should have been emailed a letter, but no email address is on file (communication not sent).<br><br>This mirrors the warning shown in the Process Multiple Customers window and ensures the note accurately reflects what occurred during processing (letter prepared but email not delivered).<br><br>Additionally, improvements have been made to the **Collections Log Inquiry** window (introduced in 25.1):<br><br>• Log detail entries now include a clear status prefix for email-related actions, such as:<br>  ○ "Email Sent"<br>  ○ "No email sent"<br>  ○ "Customer set to not get an email"<br>  ○ etc.<br>• This provides better visibility and auditing of communication outcomes, even when no note text is generated or when email actions are skipped. | |
| 4241<br>**Enhancement** | A new option has been added in the **Collections Setup** window to give users control over this behavior:<br><br>• "Exclude oldest invoices with Dispute, Promise to Pay, or Special action types from most overdue days calculation"<br>•<br>**Behavior When Checkbox is Unchecked (Default / Legacy Mode):**<br>• Collections Plans continue to function exactly as before: the oldest invoice (by days overdue) is selected regardless of action type.<br>• That invoice determines the plan action and is included as an attachment in emails/letters.<br>•<br>**Behavior When Checkbox is Checked:**<br>• The system excludes any invoice associated with a Dispute, Promise to Pay, or Special action type when calculating the "most overdue" invoice.<br>• The Collections Plan now bases its action and priority on the oldest invoice **not** linked to one of those three action types.<br>• Only qualifying (non-excluded) overdue invoices are attached to customer communications (email body or printed letter) generated during plan processing. | |
| **40656**<br>**Bug** | The email generation logic has been corrected so that custom **Email Body Text** from the CN_Letters / Letter Maintenance record is now properly included in the email body — even when no documents are attached.<br>• For Word-based letters sent via Collections Plan Processing (with or without attachments), the defined email body text now populates correctly.<br>• The fix ensures consistent behavior whether attachments are present or not. | |



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| | • Legacy behavior for non-Word letters and letters with attachments remains unchanged. | |
| **46536**<br>**Bug** | The @%AllInvoicesNotOverdueDetail% function has been corrected to strictly filter based on the days-until-due parameter and exclude all overdue invoices from future-due sections | |
| **50927**<br>**Bug** | All automatically generated and user-entered note text created through these windows is now automatically trimmed to remove any leading spaces, carriage returns, or blank lines before saving the note. | |
| **50931**<br>**Bug** | The sequence of operations in the Email window has been corrected:<br>• Document selection and printing/email attachment now occur fully before any note-related flag resets or processing.<br>• This ensures that only the user-selected documents (as marked in the print/attachment grid) are attached to the outgoing email. | |
| **51018**<br>**Bug** | Per client request, the **Mark** drop-down behavior has been restored to match previous versions:<br>• When the **Select Documents** window opens from the Contact → Print Document flow, the **Mark** drop-down now starts **blank/empty** (no default option selected).<br>• No documents are automatically marked/selected upon opening the window.<br>• Users must explicitly choose a Mark option (e.g., All Invoices, All Credits, Range, etc.) or manually check individual documents in the grid to proceed. | |
| **25.1** | | |
| 2389<br>**Enhancement** | Added the Collection Plan Processing Log window to allow the tracking and review of all actions processed through Plan Processing. Logging information includes the date/time of the processing, all customers that were included, and the resulting note text created from the process. | |
| 4765<br>**Enhancement** | Added a default setting for whether documents should be printed and/or emailed in the originating or functional currency instead of having to manually switch to originating every time. | |
| 21797<br>**Enhancement** | Added a column indicating if a PayLink already exists for any given document within the document selection/inquiry windows available within Collections Management. | |
| **24.2** | | |
| 909<br>**Enhancement** | Add functionality to either turn off or not create an additional note with the SENT LETTER action when emailing from the Collections Management. | |
| 3256<br>**Enhancement** | Added a "Mark All" button when adding documents to a note | |
| 5476<br>**Enhancement** | Display email address that emails will be going to on the 'View Letters' window. | |
| 16087 **Suggestion/ Enhancement** | Create a Pause Checkbox on the Collections Management Plan Window. | |
| **24.1** | | |
| 24310<br>**Enhancement** | Add a Selected Documents option to the Documents To Attach To Note list on Action Maintenance. | |
| **23.1** | | |



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| **14532 Enhancement** | When processing Mark Paid Notes, display a dialog at the end with the number of Notes that have been marked Completed. | |
| **14531 Enhancement** | Add Total number of items to the Task List window. | |
| **7162 Enhancement** | Add a note status of Partial Payment | |
| **7119 Enhancement** | Add SelectedDocumentsTotal letter function. | |
| **7118 Enhancement** | Collections Receivables Summary Performance Improvements | |
| **3837 Enhancement** | Added the ability to select to Print Only on the Collection Processing window. | |



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# Service Requests resolved in this release

| ID Number | Description |
|---|---|
| **25.1** | |
| **40707 Bug** | Added a new configuration setting within the Collections Management Setup window to allow the 'On Hold' note creation to utilize the original Dexterity trigger vs a SQL trigger. |
| **47513 Bug** | Cannot email collections letters listing selected invoices in conjunction with Forms Printer integration. |
| **24.2.1** | |
| **41605 Bug** | Collections Fails when Calling into Accountable Software\'s Forms Printer on GP 18.7 or newer - Wrong number of parameters sent to script \'SOP_DP_Update_Header" |
| **41623 Bug** | SOP Blank History Invoice Does Not Print Forms Printer Designated SRS Report from Collection Main Window |
| **24.2** | |
| **4869 Bug** | Letter functions within the default subject are not substituted within the resulting note created when processing through Contact window. |
| **6536 Bug** | Made changes to Collections Main and Email window to sync up behavior. If blank or missing CN Info record set to Statement Address. If Statement Address is blank, then set to Primary Bill To address. If primary bill to address is empty, then set to main address id. |
| **27294 Bug** | DSO Chart by month, not setting proper date range when using international date formats. |
| **27301 Bug** | Customers without a Statement Address ID not included in query results. |
| **27503 Bug** | Collection Management Transaction Inquiry Window Display Issue |
| **28155 Bug** | Improved performance when a large number of tasks exist and refreshing the Task List window. |
| **29423 Bug** | AllInvoicesNotOverdueDetail incorrectly returning overdue documents when specifying a days overdue variable. |
| **30184 Bug** | If assigning an Action ID with the option Documents To Attach To Note set to 'None' emails are sent with no attachments from both Collections Management Email and Contact window. |
| **24.1** | |
| **7172 Bug** | **MFA prompt is encountered twice when sending an email with an attachment from Collections Email window.** |
| 22303 **Bug** | When Changing Address ID, Territory ID doesn't change accordingly within the Collections Management main window. |
| 22799 Bug | After upgrading to GP 18.6, Collections 18.0b813 and 814 @%SelectedDocuments%@ no longer works for customer |



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| 22849<br>Bug | Collections Summary Erroring out due to integer out of range error. |
| 23281<br>Bug | Letter is not printing to local printer setup, instead it is using default printer from workstation. |
| 23641<br>**Bug** | Incorrect application name in windows for Collections Management |
| 23806<br>Bug | Overdue invoices selection on action id attaching credit document on notes when Documents Already On A Note set to something other than Do Nothing. |
| 24461<br>Bug | Improved obtaining the correct program folder when Collections Management is already installed on the workstation. |
| 24603<br>Bug | AllInvoicesNotOverdueDetail function includes overdue documents when utilizing 'Days overdue' variable. |
| 25254<br>Bug | Resolved issue requiring users to select the Windows profile used with MFA after the initial selection in any given Dynamics GP session. |
| 25443<br>Bug | Corrected parameter value entered when using the Originating/Functional field in Collection Letter Maintenance. Existing functions will continue working as designed. |
| 25759<br>Bug | Auto Process plan throws error about Query ID not found if processing plan steps from the initial prompt on login. |
| 25912<br>Bug | RM Documents creating separate email because it is using the Address Code from the RM Open table regardless of the selection of 'Letter per Bill to'. |
| **23.2.2** | |
| **25105**<br>**Bug** | Orphaned Word instances when sending Word Template documents. |
| **23.2.1** | |
| **23157**<br>**Bug** | Email body adding cover letter, email sent with all email address and email subject to customer's email. |
| **23.2** | |
| **19526**<br>**Bug** | Improvements made to the stored procedure used to populate Customer information when completing the installation of stored procedures. |
| **19932,18782**<br>**Bug** | Improvements to the multiple functions not recognizing the desired parameters. |
| **20623**<br>**Bug** | Customers with invoices generated outside of RM/SOP/IVC, now will be able to send them instead of the generic RM invoice. |
| **21305**<br>**Bug** | Improved permission script generated during install to prevent the inclusion of custom and other third party tables. |



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| **21495**<br>**Bug** | Resolved issue when calculating Action amount on new note created during plan processing. |
| **21492**<br>**Bug** | Re-enable the ability to turn this functionality off or on from within GP instead of having to go through SSMS. |
| **21367**<br>**Bug** | Issue resolved restricting the ability to process paylink for Service documents and other debit type RM documents. |
| **21330**<br>**Bug** | Process One customer on Plan processing now supports manually entering an email address. |
| **22305**<br>**Bug** | Proper invoices get rendered and attached to the email when using Letter 'Invoices to Attach to Email' functionality. |
| **22614**<br>**Bug** | **Resolved error 'An error occurred while attempting to the message. Unable to send the message' encountered when emailng with Modern Auth and 18.6 update.** |
| **23.1.2** | |
| **19079**<br>**Bug** | When using Query Letters, and selecting to email All Invoices and Credit Documents, it did not include Credit documents. |
| **20623**<br>**Bug** | On Query Letters, pre-generated invoice files that existed were being sent, even if the option to only send documents that were within the date range of the query. |
| **20637**<br>**Bug** | When processing a letter, and an action is assigned, if that action has something selected for Documents To Attach Note, that setting is was being used for which documents to attach to the email. |
| **20860**<br>**Bug** | Query Letter restriction for range of Collection Plan IDs, when combined with Consolidate National Account Activity, was not being used. |
| **23.1.1** | |
| **19249**<br>**Bug** | GP 18.3 only supports 255 characters total for all attachments which caused attachments to be split across multiple emails compared to previous versions of CM. In GP 18.4+, the limit was expanded to 4,000. Collections now detects which GP version you have and adjusts the limit. |
| **23.1** | |
| **5697**<br>**Bug** | Error – 'Member not found' when exporting to Excel from Collector Performance window. |
| **6769**<br>**Bug** | UpdateCustomerInfo – Error inserting row into CN00500 table when selecting a Collector on the Transfer Credit Manager window. |
| **14482**<br>**Bug** | Done On Date not updating in table when closing notes on Collection Task window. |
| **14392**<br>**Bug** | Collection note created everytime a change is made to the customer, not just when its hold status changes. |
| **14540**<br>**Bug** | Currency drop down field display on Collection Plan Processing when it should not. |
| **16055**<br>**Bug** | Collection Plan steps 11+ using grace period days from step 10. |

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| **17484**<br>**Bug** | Query Letter not selecting Overdue Documents. |



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Professional Advantage has been a Microsoft Presidents Club Member and Certified Partner for several years, providing offerings and products in for the Dynamic GP, Dynamics 365 Business Central and Dynamics 365/CRM space. With 6,000 customers globally, the focus has always been helping clients use the technology to make a difference and enable high performing workplaces.

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