

Release Notes

Collect 365

Version 26.2

Microsoft Dynamics 365 Business Central

Date: April 2026

HELPING
ORGANIZATIONS
achieve more
WITH TECHNOLOGY

Table of Contents

Current Release 2
 Release 26.2 – New Functionality 2
 Changes from Prior Releases 5
 Release 26.1 5
 Release 25.2 5
 Release 25.1 6
 Release 24.3 7
 Release 24.2 7
 Release 23.2 8
 Release 23.1.113.0 9
 Release 23.1.111.0 9
 Release 23.1.81.0 10
 Release 22.1.45.0 11
 Release 22.1.19.0 12

Current Release

This section details changes that were made in the current release.

Release 26.2 – New Functionality

Work Order	Description
Enhancement: 3862	Added a "Mark Complete" action that automatically marks Collection Notes as completed when all associated invoices have been fully paid. A bulk "Mark All Complete" option is also available on the Collect 365 Hub to process multiple notes at once, saving collectors significant time managing resolved accounts.
Enhancement: 6664	Expanded the XML data set available for Collect 365 Word letter templates. New fields include collector information (name, email, phone), company details (name, address, phone), invoice-level data (posting date, original amount, days overdue), and customer summary data (last payment date/amount, credit limit, salesperson). <ul style="list-style-type: none"> • Both the Initial Letter and Overdue Letter reports have been updated with additional data columns. • Updated sample .docx templates now include placeholders for the new fields. • Visibility: Requires Word Layout update in Business Central to display or reposition new fields.
Enhancement: 17906	Added a "Reply To Email" field on the Collect 365 Setup page. When configured, collection emails will include this address as the reply-to, allowing organizations to send emails from one address (e.g., accounts@company.com) while directing replies to a dedicated collections inbox.

Work Order	Description
Enhancement: 19520	Added a "Note Creation for Collect Plan" option in Collect 365 Setup. When enabled, the system automatically creates a collection note each time an email is sent through Collection Plan Processing. Notes can be configured to create with either Open or Completed status, providing a complete audit trail of automated email activity.
Enhancement: 23110	Invoices are now restricted to a one-to-one relationship with collection notes. When attaching an invoice that is already linked to another open note, the system displays a prompt offering to move the invoice to the new note. This prevents the same invoice from appearing on multiple active notes.
Enhancement: 23113	Added "Print Letters" and "Print Statements" actions to the Customer Query Results page. Collectors can now generate printed collection letters and statements for all customers in a query result set, with options to print, save as PDF, or preview. Statement printing uses the configured Statement Format templates from Collect 365 Setup.
Enhancement: 27037	Addition of Revised Date and Revised Time fields to Collection Notes for accurate revision history tracking.
Enhancement: 27041	Credit memos in Collect 365 collection emails are now displayed in red text with the amount in parentheses, making them easy to distinguish from invoices at a glance.
Enhancement: 30733	Added a "Created By" field to Collection Notes that tracks who originally created the note, separate from the assigned collector. This provides a clearer audit trail when notes are assigned or reassigned between team members.
Enhancement: 30735	Added an "Order No." field to the Collect Letter Report XML data set. This field is sourced from the Customer Ledger Entry and can be used in custom Word letter templates to include sales order numbers alongside invoice details. Visibility: Requires Word Layout update in Business Central to display or reposition the field.
Enhancement: 30736	Added a new "Date Range" option to the Customer Query aging filter. When selected, calendar date pickers appear for Document Date From/To and Due Date From/To, allowing collectors to easily filter by specific date ranges without needing to use Business Central date formulas.
Enhancement: 30737	Added an "Include Credit Memos" toggle on Collection Plan Lines. When enabled, automated collection emails will include credit memo documents alongside invoices. This setting defaults to off, preserving existing invoice-only behavior. Manual and mass email features are unaffected.
Enhancement: 30742	Improved the Customer No. and Customer Name filters on the Customer Query page with a multi-select lookup. Collectors can now use a "Select From Full List" option to pick multiple customers at once, rather than manually typing filter strings.
Enhancement: 30743	The Collection Summary Report now includes an "Aging Period" filter on the request page. Collectors can filter report results by the aging buckets configured in Collect 365 Setup (e.g., Current, 1–30 days, 31–60 days, 61–90 days, 90+).
Enhancement: 48065	Added an "External Document No." field to the Collect Letter Report XML data set. This field can be included in custom Word letter templates to display customers' purchase order or external reference numbers alongside invoice details. Visibility: Requires Word Layout update in Business Central to display or reposition the field.
Enhancement: 49453	Added a "Print when No Email Address" toggle in Collect 365 Setup (Automation section). When enabled, Collection Plan Processing automatically generates a PDF letter for customers without an email address on file, instead of producing an error. This ensures collection activity continues uninterrupted for all customers during automated plan processing.

Work Order	Description
Enhancement: 50129	Added CC and BCC fields to the Collect 365 email compose page. Collectors can copy or blind-copy colleagues, salespeople, or other stakeholders on collection emails. Multiple recipients are supported using semicolon-separated addresses. Default CC and BCC values can also be configured at the Collection Plan level for automated emails.
Enhancement: 51738	Improved the Collection Summary Report to display only data relevant to applied filters. When filtering by Assigned Collector, only that collector's notes are displayed. A new "Summary Only" toggle provides a concise view with customer-level totals without individual line details. Empty report sections are now automatically hidden.
Enhancement: 52128	When an invoice is transferred from one Collection Note to another, the original note's description is now automatically updated with a transfer remark including the destination note number, document details, and a date/time stamp. This keeps collectors informed when shared customer invoices move between notes.
Bug: 53123	Fixed an issue on the Customer Query page where date range filter values (Document Date From/To, Due Date From/To) were not cleared when switching the Aging Filter Type away from "Date Range." Previously, stale date values could silently affect query results.

Changes from Prior Releases

This section details changes that were made in prior releases.

Release 26.1

Work Order	Description
Enhancement: 19522	<p>When assigning or reassigning one or more customers to a new/different Collector, a new checkbox option is now available in the assignment process: "Transfer Collection Notes".</p> <p>If selected, all existing Collect Notes for the reassigned customer(s) are transferred to the new Collector's view and ownership for ongoing follow-up.</p> <p>If not selected, notes remain with the previous Collector.</p>
Bug: 24636	Resolved an issue where hovering over the Assign Collect Email Scenario section (or related fields/captions) in Collect 365 Setup displayed the caption/description of an Aging Period instead of the correct Collect Email Scenario information.
Bug: 49431	The Avg. Days to Pay (YTD) and Avg. Days to Pay (Last Year) values in the Payment Statistics calculations have been updated to be accurate.

Release 25.2

Work Order	Description
Enhancement: 19519	<p>The Collect 365 Plan Processing Window has been significantly enhanced to provide collectors with dynamic automation flexibility, allowing targeted customer processing instead of mandatory bulk processing of all automated collection tasks.</p> <ul style="list-style-type: none"> • Customer Query Results Filter • Saved Query Integration: Select pre-configured Customer Query Code for complex filtering logic • Query Precedence: When Customer Query Code is selected, all other filters are automatically ignored • Advanced Logic: Leverage existing query infrastructure for sophisticated customer selection <p>Custom Filter Parameters: When Customer Query Code is left blank, collectors can use multiple custom filter criteria including Customer Name, Collector, Salesperson, Payment Terms, and Balance Overdue.</p>
Enhancement: 46762	<p>Payment Statistics has been added to the Customer Collection Summary Report and Collect Hub. This enhancement provides deeper insights into customer payment behavior directly within the existing Collect 365 workflow.</p> <ul style="list-style-type: none"> • View payment trends, average days to pay, and payment method distribution at a glance. • Improve cash flow forecasting and collection prioritization. • No additional navigation required — data is now embedded in the standard report and the Collect Hub.
Enhancement: 44900	<p>Extended BC Functionality: Invoices can now be filtered out of collection processing based on Dispute Status. New Categories Added on Install/Upgrade:</p> <ul style="list-style-type: none"> • Disputed - Under Review • Disputed - Resolved • Disputed - Cancelled

Work Order	Description
	Customizable: Add more categories as needed. Mark Invoices: Assign Dispute Status directly on invoices. Filter in Processing: Use the Dispute Status dropdown on the Collection Plan Processing Filter Page to include/exclude disputed invoices.
Enhancement: 46723	New Field: Your Ref No. in Collect Letter Report. Added: Your Ref No. field now included in Collect Letter Report (Invoice Details). Visibility: Requires Word Layout update in Business Central to display or reposition the field. Action Required: Open the report in Report Layout Selection, edit the Word template, and insert the new field.
Bug: 46913	Issue Resolved: Error when sending mass emails/invoices via Collect 365 Plan Task Processing due to invoice list exceeding 2048-character limit in document filter field. Fix: Extended text limit beyond 2048 characters to support large-volume automation.
Enhancement: 46914	New Option: Skip Invoice Attachments per Collection Plan Step. Added: Do not attach Invoice Boolean field to Collection Plan Steps (Table & Page). Enhanced: Collection Tasks Processing (Manual & Automation) now respects this setting. Behavior: Invoices matching a step with Do not attach Invoice = Yes will exclude PDF attachments from the email, even if normally included. Benefit: Reduces email size, improves deliverability, and supports statement-only or summary-only collection strategies.
Bug: 46914	Fix: Resolved NoSeriesManagement Compilation Error on Publish. Issue: Publishing Professional Advantage North America_Collect 365_25.2.0.2.app to BC 27+ sandbox containers failed with error AL0185: Codeunit 'NoSeriesManagement' is missing.

Release 25.1

Work Order	Description
Enhancement: 19518	Collect 365 Automation Feature: Introduces automation for managing due and overdue invoices, replacing manual processes with streamlined identification, grouping, and email communications. <ul style="list-style-type: none"> • Customizable Collection Plans: Define sequential actions based on due date ranges, thresholds, and grace periods. Assign plans to customers for tailored handling. • Automated Processing: Run plans to scan invoices and create tasks; process tasks to generate grouped emails with templates and attachments. Supports job queues for scheduled automation. • Monitoring and Traceability: View, resend, or archive emails and tasks; maintains communication history even after archiving. • Setup Requirements: Configure admin users, email accounts, actions, and plans via the Collect Hub.
Enhancement: 27043	Unapplied Credit Amt field added to Collect 365 Customer Hub.
Enhancement: 20649	Actions and letters setup on plans cannot be deleted. Modifying actions and letters setup on plans updates the plan with the changes.
Bug: 24952	Collect permissions errors no longer occur when sending remittance advice for purchasing payment journals.
Bug: 30740	Overdue Balance (LCY) field displays in Query Results and Collect 365 Customer Hub pages and calculates based on only the overdue amounts for the associated customer.

Work Order	Description
Bug: 25858	Documentation updated to reflect possible errors when specifying report parameters for Collect 365 statements.
Bug: 41285	Special characters included within Collect 365 Note section when generating the Collect 365 Customer Summary report.

Release 24.3

Work Order	Description
Enhancement: 23112	Added currency symbol as a prefix to the Invoice Amount in Collection Letter Templates. The currency symbol is dynamically captured from Customer Currency. In the case of local currency, Currency Symbol is captured from General Ledger Setup. Currency Symbol data field is added to the XML dataset for Collection Letter Templates.
Enhancement: 14720	Collection Notes Text box previously had the limitation of height which was not user friendly. New BC Text window Box properties added to increase the Collection Notes Text box height.
Enhancement: 27336	Collect 365 Notes List Page – removed first line note (due to Rich Control functionality) and added a "Fact Box" to include the Collection Note Summary with Rich Text.
Enhancement: 24936	Collect 365 24.3 Release is compatible to be offered in Mauritius.
Bug: 25444	Fixed an issue where if the user uses the "Mass Email" functionality for more than one customer with "Include Statement" selected, it would error out with a "duplicate" error. This was fixed so that Mass Email with "Include Statements" was resolved.
Bug: 20570	The Credit Memo amount was not reflected in Collection Letter Balance which did not match with the statement generated. This issue has been fixed by adding the Credit Memo amount in Total Balance in Collection Letters.
Bug: 20870	In Collection Hub, Balance (LCY) caption changed to Overdue Balance (LCY) which correctly reflects the Overdue Amount.
Bug: 26205	When Customer Invoice has Bill-To Customer No. which is different from Sell-To Customer No., PDF creation process used to display an error. This issue has been resolved by applying correct Customer Filters to PDF report creation module.

Release 24.2

Work Order	Description
Enhancement: 21968	Collect 365 24.1 Release is compatible to be offered in South Africa.

Work Order	Description
Enhancement: 23165	Initial Letter, Overdue Letter and Statement Word Layouts now have new data element CompanyInfoPic. It is derived from Company Information > Picture data field. This data element can be added to the Word layout by drag-and-drop from XML Dataset.
Enhancement: 21366	Overdue Letter and Statement Word Layouts now have new data element Pre-Assigned No. It is derived from Posted Sales Invoice/Posted Cr. Memo > PreAssigned No. field. This data element can be added to the Word layout by drag-and-drop from XML Dataset.

Release 23.2

Work Order	Description
Enhancement: 19970	Create "Collect Statement Format" and associate it to Email/Mass Email to include Statements with Email.
Enhancement: 20194	Create "Collect Frequency" to use in Collect Automation, such as Collect 365 Plans.
Enhancement: 20209	Modify Note Attachments to show "Remaining Amount (Now)" to compliment "Remaining Amount (Time of Note)".
Enhancement: 20214	Create "Collect Plan Admin" to specify users and email addresses to send Email Communications on sending errors.
Enhancement: 20245	Collector Actions: Add "Letter Code" to assist defaulting functionality.
Enhancement: 20249	Create "Scheduled Email Plan Setup".
Enhancement: 20250	Create Automation Logic for Scheduled Email Plans.
Enhancement: 20562	Add "Action Usage" functionality around Collect Letters and Collect Actions.
Enhancement: 20563	Add Collect Automation Log.
Enhancement: 20567	Create Report "Collect Automation Admin Email" as new out-of-the-box letter format.
Enhancement: 20568	Create Report "Collect Sched. Statement Email" as new out-of-the-box letter format.
Enhancement: 20617	Add Validation to Modify/Delete of Actions and Letters when used on Plans. Add "Action Code" to Manual Emails / Mass Emails.

Release 23.1.113.0

Work Order	Description
Enhancement: 19492	Add proper "Action Type" to Collection Notes and add functionality to Collect Queries to filter Collect Notes by Action Type.
Bug: 19489	On the Customer Queries page, the "Copy Query" function would in some cases give an error not allowing you to create the Query.
Bug: 19490	When a new Query is created using the Copy Query function, the newly created Query should have the "Last Refreshed Date" and "Last Refreshed Time" cleared.
Bug: 18491	The "Refresh Query Results" function on a Query was erroneously updating ALL Queries when it should be just the specific query.

Release 23.1.111.0

Work Order	Description
Enhancement: 18079	Add "Customer Balance" as one of the filters on the Collect Notes based query section of Collect 365 Queries.
Enhancement: 18081	The "Serialization" Permission Set is no longer required to be assigned to Collect 365 users.
Enhancement: 18486	Collect 365 Mass Emailing: The list of customers on the Mass Emailing page will now allow the user to select whom will receive the emails.
Feature: 18489	Collect 365 Mass Emailing can now send invoices and credit memos as attachments like the Collect Email function.
Feature: 18085	Collect 365 Mass Emailing: Add function "Send Email with Preview" to allow each email to be previewed and sent one at a time.
Enhancement: 18464	Customer Query Results: Added "Pre-Assigned No." to Document List section.
Enhancement: 18487	Customer Queries Results: Added "Send Mass Email to All" and renamed existing function to "Send Mass Email to Highlighted".
Enhancement: 19134	Collect 365 Notes: Add "Email" and "Mass Email" functions to send emails to customers related to selected Notes.
Bug: 17975	Refunds were listed as a type of document in Collect Notes but would error if they were attached. Documents of type refund have now been removed.
Bug: 18438	Collect 365 Notes: "Attach Documents" renamed as "Add Documents" to reduce confusion with the "Attachments" functionality.

Work Order	Description
Bug: 18439	Rename section "Select Invoices to Attach to Email" to "Select Documents to Send with Email" to reduce confusion.
Bug: 18446	Rename "Customer Query" page to "Collect 365 Customer Query" to be consistent with other major Collect modules.
Bug: 18454	Customer Query Results: Fix prompts, as there were two fields with the same label of "Balance (\$)".
Bug: 18466	Reviewed Collect 365 pages that appear using the TellMe prompt to make it clearer and consistent.
Bug: 18467	Collect 365 Customer Summary Report: Removed "Interaction Log Filter" section of filter page.
Bug: 18468	Renamed "Mass Email" page to be "Collect 365 Mass Email" to be consistent with other major Collect modules.
Bug: 18530	Collect 365 Email: "Attach Invoice Copies" has been renamed to "Document Copies Required" and enhanced corresponding logic.
Bug: 18534	Collect 365 Email: In prior versions, credit memos could be selected to attach to the email, but there would be errors attempting to generate the credit memo. This has been resolved.
Bug: 18840	Internal Only: Internal Code cleanup, removing pending removal non-table objects.

Release 23.1.81.0

Work Order	Description
Enhancement: 15881	Collect Notes Card: "Document Total" and "Total Due" have been added with Drilldowns.
Feature: 15884	Collect Notes List: Add function to Delete Note (different than closing a note). Note that deletion will delete ALL revisions of a note.
Feature: 15885	Collect Notes: Add function to Re-Open Closed Notes.
Feature: 16622	The "Cue Tiles" on the Collector Role Center can now be controlled to show data for all Collectors or just the current Collector.
Feature: 15880	Collection Emails can now have any attachments added to be included in the generated email.
Enhancement: 15886	Collect 365 Queries can now be filtered by Action ID.
Enhancement:	Aging Buckets in Collect 365 can now be based on Posting Date if desired.

Work Order	Description
15888	
Feature: 6699	Ability to create a Collect 365 Note upon sending Collect 365 Email.
Feature: 16853	Mass Emailing from Collect 365. This new feature allows you to send emails via Collect to a group of customers.
Feature: 16984	The "Collect 365 Letter Setup" page has a new field allowing for a default Email Subject.
Feature: 16985	Collect 365 Emailing can now, based on Collect 365 Setup and Microsoft "Email Scenario Assignment", control the email that Collect Emails are sent from.
Enhancement: 16986	New field "Subject for Notes" is added to Queries.
Enhancement: 16987	When Invoices/Credit Memos are shown in Collect, the "Pre-Assigned No." is now also included.
Enhancement: 15738	"Payment Terms Code" and "Reminder Terms Code" added to Collect Hub List, Collect Hub Card, and Customer Queries.
Enhancement: 17689	An email can now be generated even if there are no Open documents for that customer, when the email format does not require attached documents.
Bug: 16577	Special characters in text, company names, or customized email body now display correctly in emails.
Bug: 16757	Bug in Upgrade script for Permission Sets – created a duplicate inoperable permission set that is not needed.
Bug: 17424	Upon installation of a new version of Collect, Custom Report Layouts defining alternate email body templates are no longer deleted.
Bug: 17889	The Invoice attached to the Collect Email now uses "Report Selections – Sales" consistently with Microsoft functionality.

Release 22.1.45.0

Work Order	Description
Feature: 16351	Licensing for Collect 365 is now properly using "Per Seat" Licensing.
Enhancement: 16376	Add ability to add Attachments to Collect 365 Notes.
Enhancement: 16390	Collection Summary Report: Add functionality to Include Closed Notes.

Work Order	Description
Bug: 15902	The Convert Emails to Notes function was removed from this release as it had no functionality.
Bug: 16346	"Exclude if Has Older Aging" function was not working properly on Customer Queries.
Bug: 16347	When a Customer Email is generated with an Invoice attached that was created from a General Journal, an error was generated. Now, an alert message is given and no attachment is generated for that Invoice.
Bug: 16348	On Collect 365 Notes, if a Collector Action is specified that has a default "Follow up Days", the Follow-Up Date is now defaulted.
Bug: 16349	Fixed Legacy functionality – Adding Attachments to Interaction Log Entries was not functioning properly.
Bug: 16352	Contact info was not populating in body of email for Overdue Letters.
Bug: 16359	Add table "Reminder Header" to standard "PAA Collect" Role to avoid permission errors on Role Center.

Release 22.1.19.0

Work Order	Description
Enhancement: 14717	Created the Collect 365 Hub list page for easier navigation.
Enhancement: 14715	Improvements made to the Document Attachment functionality when attaching documents to emails and notes.
Enhancement: 14502	Multiple updates made to the Collect 365 Queries interface and filters.
Feature: 6698	Added Collect 365 Note functionality to allow for creation and assignment of notes.
Enhancement: 14716	Created tab for active notes within the Collect 365 Hub.
Enhancement: 3864	Create action types that allow users to easily distinguish notes based on certain criteria.
Enhancement: 14711	Collect 365 Note revision history functionality.
Enhancement: 5763/14793	Added setup options to integrate default Reminders and tasks within Collect 365.
Feature:	Added the ability to generate an email communication from within the Collect 365 Hub.

Work Order	Description
5012	
Enhancement: 5763	Introduced Letter Type ID/table structure for letter templates.
Enhancement: 3858	Users are now able to specify if they would like to attach a copy of any outstanding documents to emails.
Enhancement: 4495	Added the ability to assign a Collector within the Collect 365 Hub.
Enhancement: 5786	Added the Collect 365 Hub to the Actions Navigation pane.
Bug: 6489	Error/Prompt "No Invoices Selected" when attempting to generate an email without any attachments.
Bug: 6145	Filter isn't set correctly when creating a new Task from the Collect Hub.
Bug: 6778	License check is encountered on the Collect 365 Setup window.
Bug: 14818	Collect 365 Letter Not Populating Correctly in Collect 365 Email Window.
Bug: 6145	Resolved an issue when creating a new task from the Collect 365 hub where the task created would not be associated with a specific customer/creditor.