



Eric Does Data, LLC

See Data Differently

AR MINDER PRO USER MANUAL



Version:

2.1

Release Date:

March 2025



Table of Contents

AR MINDER PRO USER MANUAL	0
1 INTRODUCTION.....	2
1.1 SYSTEM OVERVIEW	2
2 SIGN IN	3
2.1 SIGN-IN TO POWER APPS.....	3
3 APPLICATION INTERFACE	4
3.1 HOME SCREEN	4
3.2 MANAGE AR	4
3.3 PAYMENT PLANS	4
3.4 DATA & REPORTING	4
3.5 SYSTEM SETTINGS	4
3.6 EXCLUSIONS	4
3.7 MANAGE USERS	4
4 DATA AND REPORTING	5
4.1 EXPORTS AVAILABLE	5
4.2 POWER BI REPORT	5
4.3 SOURCE DATA	5
5 SYSTEM SETTINGS	6
5.1 CUTOFF DAYS	6
5.2 SNOOZE AND OTHER	6
5.3 PRODUCTION MODE	6
5.4 SNOOZE DAYS	6
6 EXCLUSIONS.....	7
6.1 CLIENT EXCLUSIONS.....	7
6.2 MODIFYING THE LIST	7
7 MANAGING USERS.....	8
7.1 MANAGE USERS	8
7.2 ADMIN USERS	8
7.3 APPROVERS.....	8



1 INTRODUCTION

1.1 System Overview

AR Minder Pro is a self-managing automated accounts receivable follow-up tool. It is built and managed on Microsoft Power Platform. The components of this solution include a Canvas App, a series of Power Automate cloud flows, a SQL database back end, and client-facing emails sent via Sendgrid.

Designated users are added to the application during the initial deployment, and afterwards your organization can self-manage users and access.



2 SIGN IN

2.1 Sign-in to Power Apps

- Log in to <https://apps.powerapps.com/> using your work Email and Password.



3 APPLICATION INTERFACE

3.1 Home Screen

3.2 Manage AR

3.3 Payment Plans

3.4 Data & Reporting

3.5 System Settings

3.6 Exclusions

3.7 Manage Users



4 DATA AND REPORTING

4.1 Exports Available

4.2 Power BI Report

4.3 Source Data



5 SYSTEM SETTINGS

5.1 Cutoff Days

5.2 Snooze and Other

5.3 Production Mode

5.4 Snooze Days



6 EXCLUSIONS

6.1 Client Exclusions

6.2 Modifying the List



7 MANAGING USERS

7.1 Manage Users

7.2 Admin Users

7.3 Approvers