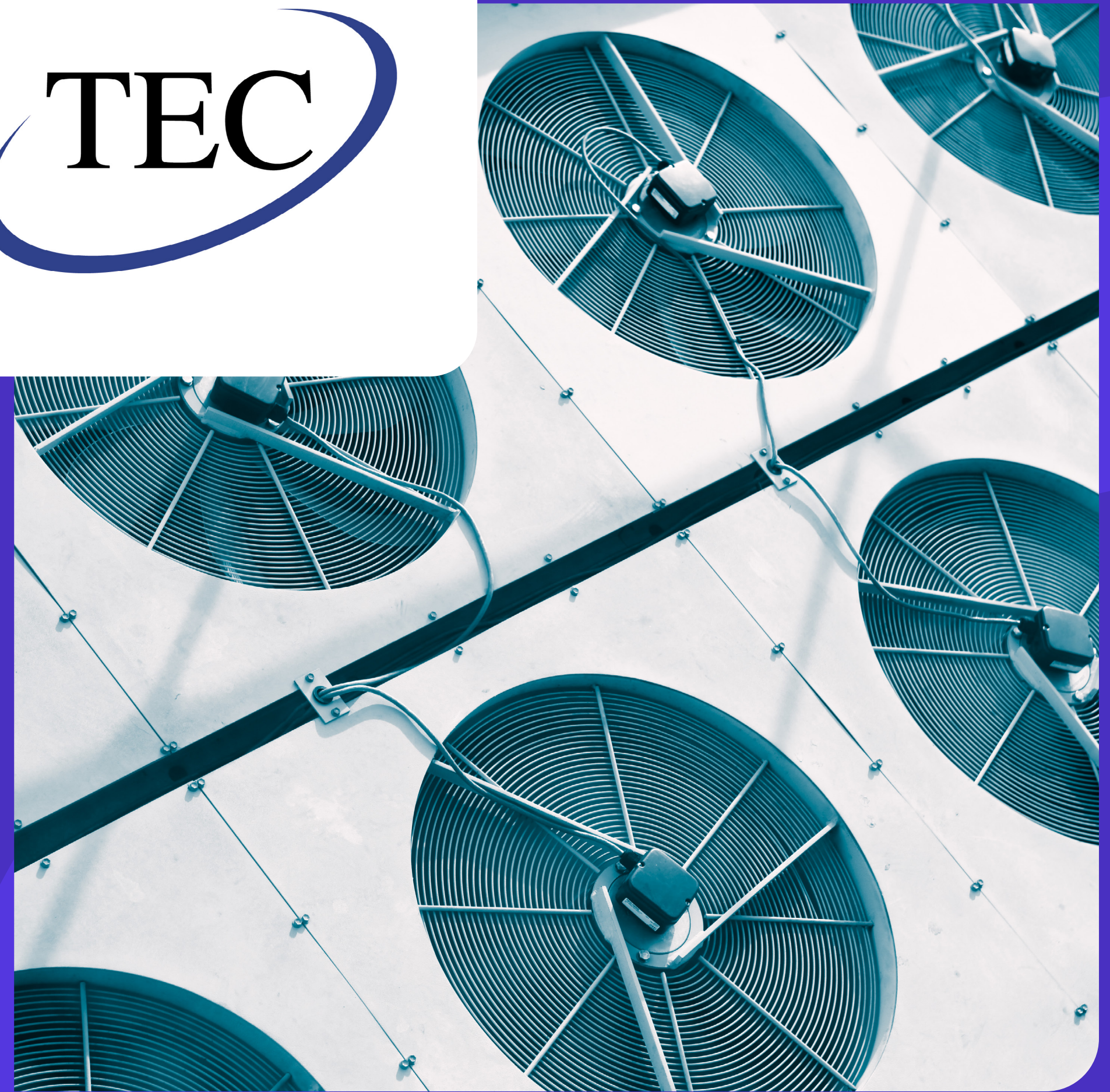


COLLECTIONS MANAGEMENT | INVOICE DELIVERY | CREDIT MANAGEMENT

Expanding the Use of AI-Driven Automation to Multiple AR Processes

Following the success of its automated collections management initiative, TEC leveraged Esker's cloud platform in invoice delivery and credit management – with transformative results.

The logo for TEC, featuring the letters 'TEC' in a bold, serif font, enclosed within a dark blue, stylized swoosh that curves around the text.


ESKER®

AT A GLANCE

Temperature Equipment Corporation

 Retail/Wholesale/Distribution

 Founded in 1935

 500+ employees

 Headquarters in Lansing, IL

 Infor SXe ERP



Challenges

Managing growth & various AR pain points

As the Midwest's largest Carrier & Bryant distributor, Temperature Equipment Corporation (TEC) had, for years, implemented a myriad of systems to manage its collections management process. Concluding that a more efficient, cost-effective and scalable solution would be necessary to handle its rapid growth, TEC selected Esker Collections Management over several competitor solutions thanks to its ease of use, seamless cloud implementation and rich, AI-driven capabilities.

A short time after implementing Esker Collections Management, TEC moved invoice delivery from another solution to Esker. Fast forward to 2022: After being acquired by another company the previous year and confronting similar inefficiencies within credit management, TEC once again was faced with a decision to modernize an essential element of its accounts receivable (AR) process.

"Our initial project with Esker gave us the tools we needed to bring our receivables under control," said Ernie Pudliner, Director of Credit. "Due to the success in collections, I was getting inquiries from other departments to see if Esker could help, and I knew they had exactly what we needed."

Objectives

Phase 1: Collections management

- Facilitate a smarter, more sustainable collections strategy
- Reduce DSO and improve management of aging
- Enhance month-end reporting capabilities

Phase 2: Invoice delivery & credit management

- Get all customers onto one centralized portal through Esker
- Reduce manual steps in the credit management process
- Free up team members for more strategic and value-added work

Solution

Leveraging AI-driven automation to benefit multiple AR teams

A major factor in Esker's appeal to TEC was its seamless integration with existing ERP systems and flexibility of its solution suite — enabling users to automate one, some or all areas within their AR processes.

"I did a lot of research looking at other solution providers and felt like many of them would've pigeonholed us into what they had," said Pudliner. "But with Esker, we knew they had the flexibility and were willing to listen and take ideas from our team and enhance the product to our specifications."

Phase 1: Collections management

The first phase of TEC's partnership with Esker involved automating elements of its credit and collections process. Prior to Esker, the company was relying on its ERP system to manage the process, which, due to the lack of capabilities and visibility, inhibited the team's collections and reporting performance.

Today, using Esker Collections Management, TEC is able to collect on time and in accordance with its collection strategy thanks to AI-driven tools and capabilities like:

- Automatic payment reminder emails
- Online self-service customer portal
- Online credit application
- Customized to-do lists
- Root-cause analysis

Phase 2: Invoice delivery & credit management

Building off the momentum of its initial implementation with Esker, TEC set its sights on pursuing similar digital strategies within other areas of receivables.

"Our first priority was adopting Esker Invoice Delivery and getting all our portal users moved over," said Pudliner. "With our previous vendor, we saw a slippage in how things were handled, so we used the mechanisms within Esker to message our customers and get just about all of them switched over — there's just so much more customers can do in Esker's portal, which made 'selling' it much easier."

Additionally, leveraging Esker Credit Management enables TEC to meet its goals from a credit review perspective thanks to the solution's ability to simplify onboarding, secure the credit approval process and provide full visibility into customers.

"I'd had a lot of exposure to AR systems, and Esker passed the test with flying colors — it's just so intuitive and easy to use."

Ernie Pudliner
Director of Credit, TEC



Highlights

- **Reduced DSO** by an average of 10 days
- **88% faster resolution** of customer disputes
- **Accelerated turnaround time** for open account credit applications from 7–10 days to 3–4 days
- **75% of TEC's "top" customers** now use Esker's customer portal to pay invoices view statements, dispute invoices and send messages
- **Reduced number of phone calls and emails** from inquiring customers — from up to 15 per day to 1–2 per day
- **Streamlined the audit process** to ensure SOX compliance

Results

Improving end-to-end efficiency, visibility & collaboration

With Esker, TEC has been able to positively impact nearly every stakeholder connected to collections, invoice delivery and credit management — from AR team members to management to the customers themselves.

"I can't say enough about Esker's product and the people I've worked with," said Pudliner. "It's made so many aspects of AR easier for us — whether it's giving our team daily snapshots of what accounts they should be calling, using the reporting function to avoid month-end headaches, or getting more credit reviews done of existing accounts, these are all things we weren't capable of doing in the past."

Remote work capabilities

Like most companies in recent years, TEC has been in situations that necessitated remote work — not a simple transition when you're trying to implement new solutions while also adapting to recent acquisition. Thankfully, Esker made things easy for Pudliner and his team.

"If we didn't have Esker in place, we would not be able to do our job away from the office," said Pudliner. "Having Esker, I've got the office right on my computer. I can process and do anything without the need to be in the physical building. We haven't skipped a beat."

"Esker provides me the capability to be able to monitor what all my people are doing on a daily basis and ensuring our top accounts get the attention they need."

Ernie Pudliner
Director of Credit, TEC

Want to automate your accounts receivable processes like TEC?

Our team is at your service.

About Esker

Esker's AI Automation Suite for the Office of the CFO leverages the latest in Agentic AI and automation technologies to optimize working capital and cashflow, enhance strategic decision-making, and improve human-to-human relationships with customers, suppliers and employees. Esker's Source-to-Pay and Order-to-Cash solutions automate any business process while supporting long-term growth strategies. Offering 40+ years of industry knowledge, Esker operates in North America, Latin America, Europe and Asia Pacific with global headquarters in Lyon, France, and U.S. headquarters in Madison, Wisconsin.

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