

Claims & Deductions Automation

Don't let deductions eat into your profit margins

Esker Claims & Deductions helps Accounts Receivable (AR) and Customer Service (CS) departments efficiently manage customer claims, deductions and invoice disputes while protecting margins. Thanks to AI-driven data capture from supporting documents and automated workflow capabilities, Esker manages both trade and non-trade claims and deductions related to pre-agreed promotions and marketing contributions, as well as those arising from shortages, damaged products and price discrepancies.

Why automate with Esker?



Enhance visibility on claims & deductions

Centralize information by reconciling deduction data with claim data, and monitor trend analytics by date, type or customer.



Facilitate cross-department collaboration

Enhance collaboration with flexible investigative processes, approval workflows and a user-friendly interface with an internal chat tool.



Reduce costs & speed up resolutions

Cut operational costs and accelerate claims and deductions resolution by minimizing manual processing and errors.



Limit invalid deductions

Identify, contest and collect invalid deductions. Lower automatic write-off threshold for low-value deductions.

How it works

Esker offers a comprehensive solution that helps businesses efficiently manage claims and deductions and streamline all essential processing phases.

Claims & deductions reception

Regardless of origin (remittance, short payment, invoice dispute, EDI document, email, etc.), all submitted claims and deductions are consolidated in a single location.

Data verification

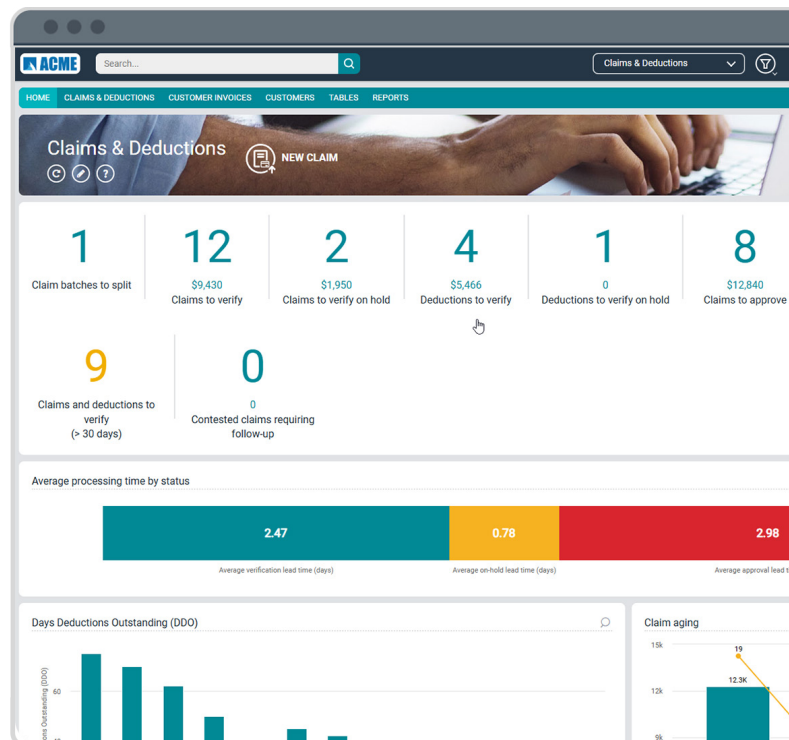
AI-driven technologies accurately extract relevant information from supporting documents, categorize it by type and automatically associate the claim with the corresponding customer, deduction, invoice or promotion.

Approval workflow

Depending on type or amount, claims are investigated through multi-level approval workflows where teams can add information and either accept or contest the deduction.

ERP integration

Once approved, the resolved claim amount is automatically accounted for in the ERP as a credit note or on a GL account, clearing the potential deduction.



Solution features

Esker's 40+ years of field experience and dedication to product development is the key to the continued innovation in Esker Claims & Deductions. Here are some of the features that stand out the most:



Dashboard & analytics

Esker Claims & Deductions is equipped with intelligent dashboards that display real-time analytics visually (Days Deductions Outstanding, claims by date, customer, authorized vs. contested deduction amounts, etc.) to help monitor activity and risk. This feature is fully customizable so that users can choose and track what they want to see.



AI-driven data recognition

Built into Esker Synergy AI, data is captured from supporting documents, including payment remittances, debit notes, promotional invoices, credit requests or simple emails. Key header and line-item level information is identified, such as customer, amount, reference, invoice number, product, quantity, price or promotion. Esker Synergy AI automatically improves accuracy along the way and adapts to layout changes by learning from user corrections.



Workflows & collaboration

Configurable approval workflows based on claim types and amounts can easily be adapted to varying needs. Users from different departments can collaborate internally to resolve claims quickly — for example, Sales Reps for issues related to sales agreements and promotions, and the Supply Chain team for delivery-related issues. They can approve claims and deductions, clarify or dispute them as needed, and communicate with partners or customers through an external conversation tool.



ERP connectivity

Esker Claims & Deductions includes a built-in integration for SAP® and any other ERPs, enabling easy implementations in hybrid ERP environments. Once a claim or deduction has been settled in the Esker solution, the data is automatically transmitted to the ERP, either as a credit note or a GL account adjustment, and any outstanding balance resulting from short payments is cleared.

Optimize the entire order-to-cash cycle with one integrated solution suite

Esker offers a comprehensive Order-to-Cash solution suite that automates and connects every customer interaction. By bridging Customer Service and Accounts Receivable teams and processes, Esker's integrated solution suite enhances the customer experience while strengthening the company's cashflow.

To break down silos and maximize efficiency across teams, Esker Claims & Deductions integrates directly with the other solutions in the suite.

• Esker Cash Application

Automatically create deductions from short payments identified in remittances and initiate the investigation process in Claims & Deductions as early as possible.

• Esker Collections Management

Automatically create claims from invoice disputes and ensure invoices associated to claims are not collected until the claim is resolved.

• Esker Invoice Delivery

Associate claims with their corresponding invoices and proofs of delivery sent with the invoice, and easily navigate between related documents.

• Esker Customer Inquiry Management

Use AI-driven classification to automatically identify claim-related supporting documents and emails in shared inboxes and route them to Claims & Deductions.

• Esker Order Management

Associate claims with their corresponding orders and easily navigate between related documents.