

Customer Service Automation

Leverage agentic AI to empower your B2B Customer Service department

In today's business landscape, few functions are as crucial to business success as Customer Service. Equipping your B2B Customer Service team with AI automation tools, including Generative AI and agents, enables them to deliver faster, consistent and personalized customer experiences while operating more efficiently. Esker's Customer Service solution suite automates routine tasks associated with managing customer requests, orders and claims, helping organizations protect revenue, reduce cost-to-serve and strengthen cashflow through faster issue resolution and more efficient order-to-cash processes.

Why automate with Esker?

**Operational and financial performance**

Reduce cost-to-serve, protect revenue and strengthen cashflow through Esker Synergy AI that includes automation and agentic technology.

**Enhanced operational visibility**

Gain real-time insight into customer service operations, identify bottlenecks and support better business decisions.

**Empower your team**

Free CSRs from repetitive tasks so they can focus on complex issues, customer relationships and revenue-generating activities.

**Improved customer experience**

Be the company customers trust by ensuring transparency and proactivity, consistently meeting SLAs and providing self-service tools.

Customer Service solution suite

Esker offers a comprehensive and scalable Customer Service solution suite tailored for B2B Customer Service departments, enabling them to consistently deliver exceptional customer experiences.

Customer Inquiry Management

Esker Customer Inquiry Management enables Customer Service teams to respond to questions quickly and accurately. Acting as a central communications and orchestration platform through Synergy AI Agents that are connected to the internal business systems, relevant information is automatically retrieved and contextual response suggestions are generated. These can then be reviewed by CSRs before sending. When additional information is needed, CSRs can easily collaborate across departments. Synergy AI helps formulate accurate and appropriately toned responses. By combining AI-powered assistance, business data and team collaboration, Esker enables faster responses, improve customer satisfaction and builds lasting customer trust.

Order Management

Esker Order Management leverages Synergy Agentic AI to tackle the repetitive, low-value tasks that occur in order processing, such as manual data entry. With those taken care of, Customer Service teams can focus on exceptions, customer relationships and supporting

business growth. This comprehensive solution automates every phase of order management, from order reception, sending a shipping notice to creation in the ERP. CSRs can electronically process and track any order with the highest levels of accuracy and visibility, whether it was received by fax, email, EDI, portal or mobile.

Claims & Deductions

Customer claims and invoice deductions are often closely connected: Operational issues such as delivery problems or pricing discrepancies frequently result in short payments that can negatively impact cashflow. Esker Claims & Deductions provides a single platform to capture, investigate and resolve both claims and all types of short payment by centralizing all related information, communications and supporting documents. The resulting visibility into issue investigation and resolution workflows, and the ability of Customer Service and Accounts Receivable teams to collaborate effectively to make informed decisions, accelerate issue resolution, improve customer satisfaction and protect revenue and cashflow.

Solution features

Esker's extensive field experience and commitment to product development are crucial to the ongoing innovations within the Customer Service solution suite. Here are some of the features that stand out the most:



Esker Synergy AI & Agents

Esker Synergy combines advanced AI technologies that include machine learning, natural language processing (NLP), generative AI, Retrieval-Augmented Generation (RAG) and agentic AI, all embedded directly within Customer Service workflows. These work together to automate tasks, guide users and accelerate decision-making: Synergy AI automatically classifies inquiries, extracts data from customer documents and communications, detects sentiment, identifies exceptions and generates contextual response suggestions. Synergy AI Agents can also execute actions on behalf of users, which enables Customer Service teams to resolve inquiries, process orders and manage claims more efficiently, all while maintaining human oversight.



Self-service agent

Customers can interact with a business through the Synergy Agent on Esker's customer portal as well as on Microsoft Teams. Connected to internal systems that hold all relevant company knowledge, the agent can answer questions, provide order information and even assist customers in completing transactions such as placing orders. The agents deliver instant support while reducing the workload for Customer Service teams.



Customer Service monitoring

B2B Customer Service teams perform best when guided by sound, data-driven strategies. Esker's intelligent solutions capture the most relevant insights from customer interactions and display live KPIs through customizable dashboards. This empowers teams to monitor activity, track SLA compliance and analyze trends across customers, requests and processes. By leveraging AI-driven sentiment analysis, the business can measure customer satisfaction, identify emerging issues and proactively address risks that could negatively impact the relationship with customers. In addition, Esker's process optimization AI agents continuously analyze performance and provide recommendations to improve automation, data connectivity and AI-assisted workflows, which increases efficiency and delivers better business outcomes.



The Esker Connectivity Suite

Esker's solutions seamlessly integrate with multiple systems including ERPs, CRMs, transport management, warehousing and product information systems through its Connectivity Suite, which offers various integration options such as pre-built connectors, APIs or managed file exchanges. The suite includes pre-built integrations for SAP® and Oracle® EBS ERPs, as well as Salesforce CRM, and provides simultaneous integration with multiple systems, simplifying diverse environments resulting from mergers and acquisitions. The system integration capabilities allows CSRs to quickly and accurately respond to product inquiries, check availability or delivery status, and automate order and claims management processes.



Collaboration tools

Esker automates B2B Customer Service processes related to managing inquiries, orders and claims, while also fostering collaboration among all stakeholders. Using tools like internal conversations with coworkers, investigation and approval workflows, and external communications with partners and customers, any request can be clarified with all exchanges tracked in a centralized location. For example, CSRs can easily verify credit levels with Finance, confirm prices with Sales or directly discuss unusual order quantities with the customer directly.



Global capabilities

Esker's Customer Service solution suite is built for global companies operating across different regions. The interface is available in seven languages and data can be extracted from documents in over 130 languages. Additionally, international teams can implement and support customers worldwide: Consulting teams coordinate global projects, while Solution Support and Customer Success teams provide coverage across all countries and time zones.

Esker's Customer Service solution suite is part of Esker's broader Order-to-Cash portfolio. Combined with Esker Accounts Receivable solutions, customer interactions are automated end-to-end: from inquiries, orders and claims through invoice delivery, to payment and collections management. By connecting customer service and accounts receivable operations on a single platform, businesses improve the customer experience, accelerate cashflow and gain greater visibility across the entire customer journey.