

Customer Service Automation

Leverage agentic AI to empower your B2B Customer Service department

In today's business landscape, few processes are as crucial to success as Customer Service. Equipping your B2B Customer Service team with AI automation tools, including Generative AI and agents, enhances the customer experience throughout the order-to-cash cycle. Esker's Customer Service solution suite automates routine tasks associated with managing customer requests, orders and claims, so that CSRs can focus on more rewarding activities that have a direct positive impact on both your customers and your company.

Why automate with Esker?



End-to-end efficiency

Reduce processing times and administrative costs with automation and Synergy Agentic AI technology.



Enhanced visibility

Gain instant visibility on customer service processes, enabling continuous improvement.



Empower your team

Ensure CSRs spend more time on high value tasks focused on customer satisfaction.



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.

Order Management

Esker Order Management leverages Synergy Agentic AI to tackle repetitive, low-value tasks of order taking like human data entry. This comprehensive solution automates every phase of order management, from order reception to sending a shipping notice and creation in the ERP system. It enables CSRs to electronically process and track any order — whether received via fax, email, EDI, portal, or mobile — with 100% accuracy, visibility, and efficiency.

Customer Enquiry Management

Esker Customer Enquiry Management powers shared inboxes with the Synergy Agent that helps Customer Service and Accounts Receivable teams manage and resolve enquiries in real time. It automatically classifies incoming messages from any channel and routes them to the most appropriate team or application. Incoming messages with a negative tone are identified using sentiment analysis and RAG-assisted replies create accurate and relevant answer suggestions that can easily be personalised — empowering teams to deliver faster, more personalised and impactful customer interactions.

Claims Management

When customers submit claims, they don't expect perfection but they do expect preparedness. Esker Claims Management enhances the customer experience by enabling CSRs to log, track, manage and prioritise all claims, bringing clarity to issue management workflows. With readily available issue-related data, CSRs can make informed decisions, improving claims processing and customer satisfaction rates, and positively impacting financial performance.

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

Esker Synergy AI harnesses cutting-edge AI technologies including machine learning, deep learning, natural language processing (NLP), GenAI and Retrieval Augmented Generative (RAG). Esker Synergy categorises enquiries, analyses sentiment in customer emails, extracts key data from enquiries, orders, or claims, identifies unusual quantities in new customer orders and suggests responses. With the Synergy AI assistant, CSRs can quickly access the right information, improving both their efficiency and overall day-to-day experience.

Self-service agent

Customers can interact with companies through the Synergy Agent across multiple channels, including Esker's customer portal, Microsoft Teams, WhatsApp, etc. They can ask questions — such as checking order status, enquiring about a product or placing an order — and receive instant responses to their requests.

Customer Service monitoring

B2B Customer Service teams perform best when guided by data-driven strategies and actions. Esker's intelligent solutions capture the most pertinent analytics from customer communications and display live KPIs through a sleek and customisable dashboard. This empowers CSRs to visualise and prioritise organised to-do lists, monitor activity by type, date or customer, track SLA compliance, and analyse trends to identify areas for improvement and opportunities.

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 enquiries, check availability or delivery status, and automate order and claims management processes.

Collaboration tools

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

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 Experience teams provide coverage across all countries and time zones.

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