Solution summary

Claims & Deductions Automation

Resolve customer claims effortlessly

Esker Claims & Deductions streamlines the claims process, enabling Customer Service departments to ensure customer satisfaction by efficiently resolving claims and invoicing disputes. With AI-driven data capture and automated workflow capabilities, logistics claims related to shortages and damaged products, as well as financial claims involving price discrepancies and promotions are effectively managed.

Why automate with Esker?

Enhance process visibility
Get real-time KPIs and charts, as well as insights on claims processed by date, type or customer.

Facilitate cross-department collaboration
Promote collaboration with other departments through an approval workflow and an internal chat tool.

Centralise claim information
Consolidate and track claims from various sources (email, EDI, short payment, invoice dispute, etc.) in one location.

Reduce costs & speed up resolutions
Cut operational costs and accelerate claim resolution by minimising manual processing and errors.

How it works

Esker offers a comprehensive solution that helps businesses efficiently manage their claims and streamline all essential phases of the process.

Claims reception
Regardless of reception source (email, PDF, Excel, EDI, etc.), all submitted claims are routed to a single queue for processing.

Data verification
AI-driven technologies accurately extract relevant information from supporting documents, categorise it by type and automatically associate the claim to the corresponding customer, invoice, delivery note or order.

Approval workflow
Depending on type or amount, claims are investigated through a multi-level approval workflow where teams can add information and approve or reject the claim.

ERP integration
Once approved, the settled claim amount is automatically accounted for in the ERP as a credit note or on a G/L account.

Solution features

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

Dashboards & analytics

Esker Claims & Deductions is equipped with intelligent dashboards that display real-time analytics visually (claims by date, customer, authorised vs. challenged claim amounts, etc.) to help monitor activity and risk. This feature is fully customisable 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. Key header and line-item level information is identified, such as claim reference, customer name, amount, invoice number, product, quantity, price and promotion reference. Esker Synergy automatically improves accuracy along the way and adapts to layout changes by learning from user corrections.

Multi-level approval workflows

Configurable approval workflows based on claim type or amount can easily be adapted to varying needs. Users from different departments can collaborate on customer claims — such as sales reps for matters related to sales agreements and the Supply Chain department for issues related to deliveries. When approving or challenging claims (partially or completely), users can enrich the claim case with additional information and related documents.

Collaboration & communication

By linking a claim with the associated internal documents (payment, promotion, invoice, delivery note or order, etc.), team members have all necessary information at their fingertips to quickly and accurately address issues. To enhance collaboration and communication within the company, an internal chat tool allows users to track conversations directly on the claim, which are then visible to all contributors. Users can also clarify or challenge claims directly with customers, using external conversation tool that is also directly attached to the claim.

ERP connectivity

Esker Claims & Deductions includes a built-in integration for SAP and any other ERPs, enabling easy implementations in hybrid ERP environments. Once claims have been approved in Esker, the data is automatically transmitted to the ERP, either as a credit note or on a G/L account, and any outstanding balance resulting from short payments is cleared.

Deliver the best customer experience possible — every time

Looking to automate the entire customer service process?

Esker offers a comprehensive and scalable Customer Service solution suite tailored to B2B Customer Service departments, enabling them to consistently deliver an exceptional customer experience. 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 customer satisfaction and business success.

In addition to Esker Claims & Deductions, Esker's Customer Service solution suite includes:

Esker Customer Enquiry Management, a digital assistant for the shared inbox, enables B2B Customer Service departments to track and answer all customer requests quickly and accurately with Retrieval-Augmented Generation (RAG) assistance.

Esker Order Management digitally processes and tracks orders from any incoming channel or format through a single interface powered by AI.

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