ESKER

Claims & Deductions Automation

Don't let deductions eat into your profit margins

Esker Claims & Deductions helps Accounts Receivable (AR) departments efficiently manage customer deductions and contested amounts while protecting margins. Thanks to AI-driven data capture for claims and automated workflow capabilities, Esker manages both customer trade deductions associated with promotions and marketing contributions, and non-trade deductions related to shortages, damaged products or price discrepancies on invoices. The latter primarily impact food, beverage and consumer goods manufacturers and distributors.

Why automate with Esker?

Enhance visibility on receivables and revenue
Get real-time KPIs and dashboards with detailed deduction trend analytics by date, type, or customer, along with a comprehensive audit trail.

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

Centralise deduction information
Consolidate data by linking customer payments and supporting documents to relevant promotions, invoices, delivery notes, or order documents.

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

How it works

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

Deduction reception

Regardless of origin (remittance, short payment, invoice dispute, supporting document submission, etc.), all submitted deductions 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 deduction with the corresponding customer, invoice or promotion.

Approval workflows

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

ERP integration

Once approved, the resolved deduction amount is automatically accounted for in the ERP as a credit note or on a G/L account.
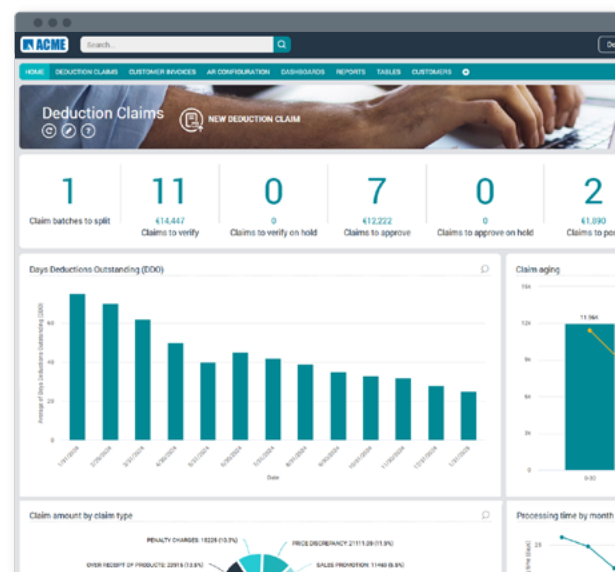
Solution features

Esker's 40 years of field experience and dedication to product development is the key to the continued innovation in Esker Claims & Deductions solution capabilities. 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, deductions by date, customer, authorised vs. challenged deduction 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, including payment remittances, debit notes, promotional invoices, credit requests or simple emails. Key header and line-item level information is identified, such as deduction reference, customer, 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 deduction amounts can easily be adapted to varying needs. Users from different departments can collaborate on deduction questions, such as sales reps for matters related to sales agreements and promotions. When approving or contesting deductions (partially or completely), users can supplement the deduction case with additional information and related documents.

Collaboration & communications

By linking a deduction on the customer side to 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 deduction case, which are then visible to all contributors. Users can also clarify or challenge deductions directly with the customer, using an external conversation tool that is also directly attached to the deduction case.

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 deduction has been approved in the Esker solution, 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.

Optimise the entire invoice-to-cash cycle with one integrated solution suite

Esker offers a comprehensive Accounts Receivable solution suite that automates and connects every step of the invoice-to-cash process. By instantaneously applying additional insights from other Esker solutions, the deductions process becomes remarkably efficient.

- Get real-time updates when remittances and payments arrive and easily create deductions stemming from short payments with **Esker Cash Application.**

- Accelerate contestation management and ensure that disputed invoices are visible to all departments at all times. With the integration of **Esker Invoice Delivery, Esker Collections Management,** and **Esker Claims & Deductions** solutions, deductions are automatically created when a customer contests an invoice. Additionally, tasks such as investigating invoicing disputes and short payments can be assigned to other team members, helping to streamline the resolution process.

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