



From Invoices to Insights: **Practical Use Cases Transforming** **Accounts Receivable**

How AI is Modernizing AR Operations Today

Sarah-Jayne Martin | CRF August Forum



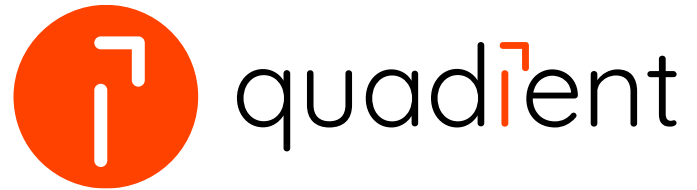
Sarah-Jayne Martin

Director, America's Sales

I've worked in B2B finance leadership roles for more than 20 years, managing the order-to-cash process for global firms.

Throughout my career, I've seen innovations in finance technology and implemented automation and AI-powered solutions to drive improvements in cash flow, employee, and customer experiences.





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| Agenda

1. Why AI is a critical consideration today
2. Where it fits into your AR value chain
3. Five practical uses cases for AI
4. How AI can help leadership decision making
5. How to start your AI Journey
6. Q&A



| Why AI in Accounts Receivable Now?

- Rising invoice volumes and complexity
- Pressure to accelerate cash flow and reduce DSO
- High dependency on manual AR processes
- Growing demand for digital, self-service experiences

I Where AI Fits in the AR Value Chain

AI Across the AR Lifecycle



- Invoice delivery and tracking
- Payment matching & cash application
- Collections prioritization
- Dispute and deduction management
- Customer self-service and communication
- Reporting and cash forecasting

Use Case #1: Intelligent Invoice Delivery

Multi-channel invoice
distribution
(email, portal, EDI)

Invoice visibility and
engagement
tracking

Automated
reminders based on
invoice behavior

| Use Case #2: Automated Cash Application



AI-driven
payment-to-
invoice matching



Handling of
partial payments
and short pays



Continuous
learning from
prior matches

Use Case #3: Predictive Collections Prioritization

Risk-based customer segmentation

Prediction of late payment likelihood

Dynamic collector worklists



Use Case #4: Dispute and Deduction Intelligence



- Automated classification of dispute types
- Root-cause analysis across customers and products
- Faster routing and resolution

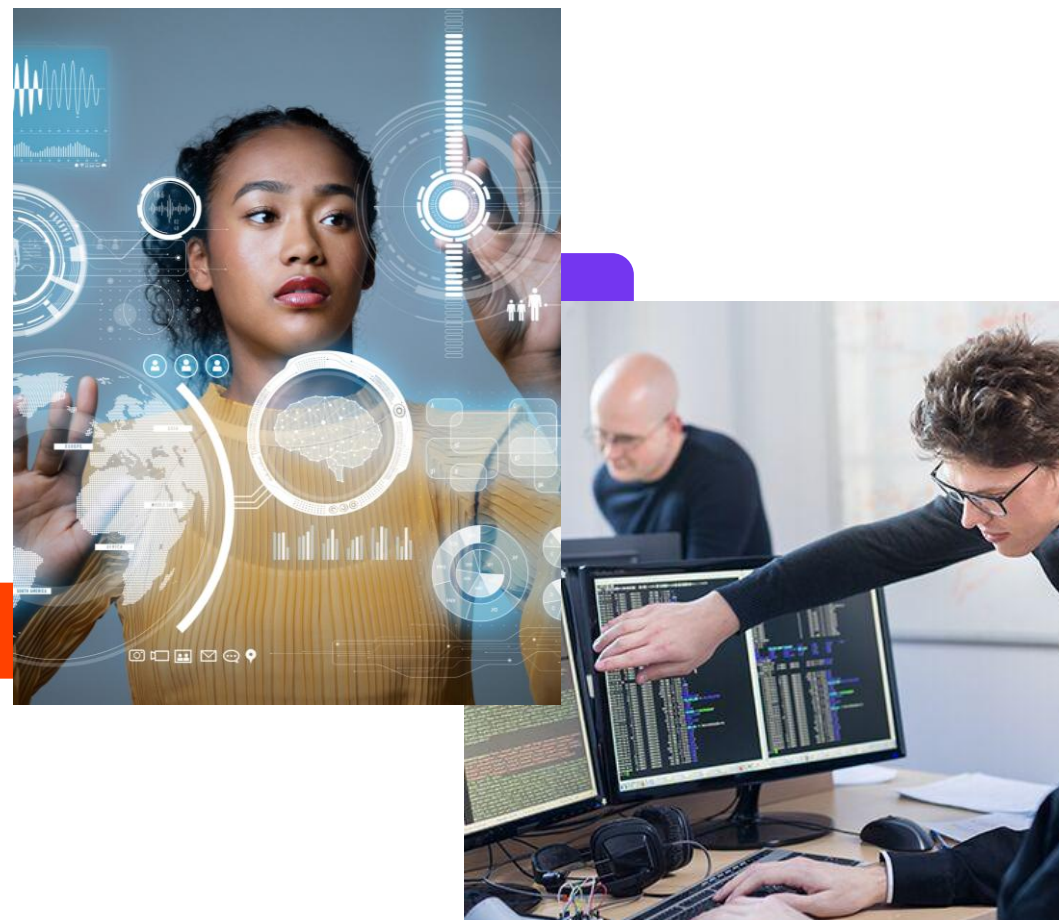


Use Case #5: Conversational AI and Self Service

- AI chatbots for invoice and payment inquiries
- Natural-language responses to common questions
- 24/7 customer support without added headcount

AI Driven Insights for AR Leadership

- Predictive cash forecasting
- Early warning indicators for delinquency
- Trend analysis across payment behavior and disputes



| What These Use Cases Have in Common



High-quality AR
and payment data

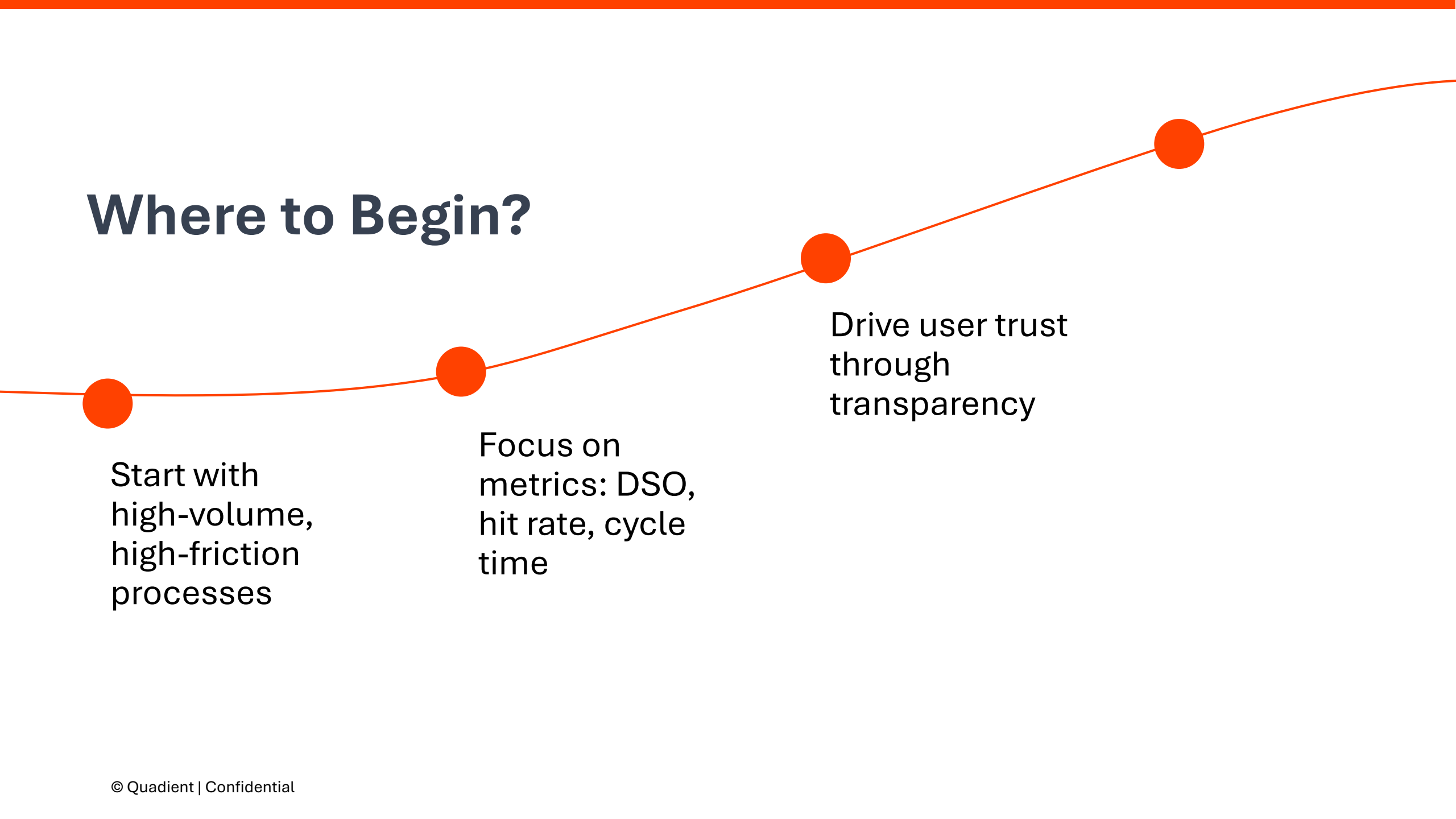


Embedded AI
within core
workflows



Human oversight
and exception
handling

Where to Begin?



Start with
high-volume,
high-friction
processes

Focus on
metrics: DSO,
hit rate, cycle
time

Drive user trust
through
transparency



Key Takeaways

- AI is already delivering measurable AR improvements
- Practical use cases outperform broad “AI transformation” efforts
- AI can be operationalized today and can shift AR from transaction processing to cash-flow strategy



Q&A

Sarah-Jayne Martin

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Meet the Cash Flow Whisperer

Quadient Accounts Receivable

Discover how smarter AR strategies can help create more predictable cash flow, stronger customer relationships, and a healthier bottom line.

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Meet the "Cash Flow Whisperer"

Quadient Accounts Receivable

Discover how smarter AR strategies:

- Create predictable cashflow
- Build stronger relationships
- A healthier bottom line

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Breaktime provided by CRF &



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