



Auditoria® AR Collections

Automate Collections and Dunning Activities



IMPROVE CASH PERFORMANCE • INCREASE PRODUCTIVITY DELIVER BETTER CUSTOMER SATISFACTION

Auditoria's AR Collections increases speed, accuracy, and efficiency in the finance office using agentic AI SmartBots to automate redundant and manual accounts receivable processes and derive greater cash position visibility.



CUSTOMIZED DUNNING TEMPLATES

AR team members create dunning email templates that include freeform text with drop-and-drag attributes from the system of record (SoR). Template attachments are configurable to include invoice PDFs and statements as CSV or PDF files plus other custom fields imported from the SoR. Robust reporting offers insights into the dunning and other AR activities such as AR balances and disputes.



INTELLIGENT CLASSIFICATION

Customer payments are managed with intelligent, granular classification rules for personalized engagement for each account or payer type. Dynamically recalibrate and reclassify accounts as their payment behavior changes to ensure more accurate payments and reporting.



DIVERSE, TARGETED DUNNING CAMPAIGNS

SmartBots send courtesy notices and dunning based on communications cadences set to specific account criteria, including hierarchies or invoice level. These notifications are sent at specified intervals to configurable dunning groups based on invoice date or due date. Dunning sequences maximize collections efforts and streamline correspondence, saving countless hours.



PRIORITIZED TASKS

Collections teams' efforts are streamlined with a daily task list of strategic recommendations and prioritized actions. Curated by SmartBots, the task list is dynamically updated to maximize efforts and outreach so that age and amount are no longer the only levers to determine a course of action.



COLLECTOR CRM

SmartBots collect and populate rich account CRM with detailed notes, reminders, and audit logs to provide a comprehensive 360-degree view of collections interactions across the portfolio of accounts. Each interaction—whether SmartBot-driven or human-driven—is captured, providing detailed audit and account analytics to provide collections team with greater visibility and transparency.



"If we can supplement people's roles with technology that removes the rudimentary tasks and allows them to focus on becoming a more efficient organization — I would buy that technology any day."

— Tyler Sloat, CFO Freshworks

WHAT'S SO "SMART" ABOUT AUDITORIA?

Auditoria® SmartBots are discrete, pre-packaged, purpose-built accounting AI agents that perform a wide range of critical finance office functions, automatically. Called SmartBots, they act as AI TeamMates that engage with systems of record, shared inboxes, and key stakeholders. SmartBots capture actions and hand-off to humans using workflows to escalate when intervention is needed. Purpose-built for finance, Auditoria SmartBots offer full-featured inquiry response and fulfillment to fully manage the shared AR inbox.

HOW IT WORKS



ADVANCED TECHNOLOGY THAT UNDERSTANDS FINANCE

- Rich Natural Language Processing (NLP) allows SmartBots to perform a range of tasks and communicate to internal and external stakeholders using natural language.
- Cutting-edge machine learning and generative artificial intelligence built technology delivers a 10x multiplier in accuracy and productivity.



MAILBOX MONITORING AND ORGANIZATION

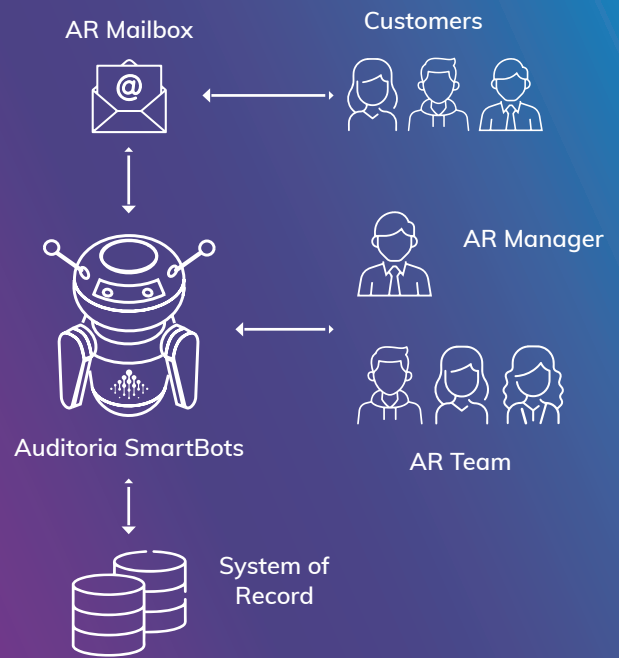
- SmartBots collect and monitor the AR inbox, reading emails and attachments, capturing updates and escalations.
- Emails are classified by type and summarized using gen-AI to reduce clutter and streamline next steps for the AR team.



DATA RECONCILIATION WITH SYSTEMS OF RECORD

- Achieve end-to-end tracking, fulfillment, and reconciliation of payments to increase productivity and effectiveness with complete coverage.
- Ensure data written to the system of record is checked and approved before being uploaded to verify inputs and improve accuracy with approval workflows.

Auditoria's SmartBots provide a system of engagement, utilizing the AR inbox and systems of record to automate AR functions to improve cash performance.



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HOW WE HELP



RAPID TIME TO VALUE

See value in days, not weeks or months, using automation with minimal IT dependence, thanks to pre-built integrations with leading ERP, collaboration, and email systems.



IMPROVED COMPLIANCE AND GOVERNANCE

Deliver accurate, complete, and timely financial reporting to shareholders, investors, and auditors by ensuring that data is always audit-ready.



SECURITY AND PEACE OF MIND

Remove the stress and friction in the finance function with a secure and reliable system of unparalleled financial precision that captures an audit trail of activities in the system.



SPEED AND VELOCITY

Give finance teams the ability to move at lightning speed, accomplishing more than ever thought possible, faster than ever imagined.



ERROR-FREE TASK EXECUTION

Remove human-introduced errors from the equation to ensure that transactions reconcile across systems of record.



PURPOSE-BUILT FOR THE FINANCE FUNCTION

Auditoria's solutions were explicitly built for the finance function, with machine learning and natural language processing capabilities that understand finance vocabulary and context for the richest, most reliable AI-enabled finance workflows.



About Auditoria

Auditoria accelerates breakthroughs for finance by deploying agentic AI, SaaS automation to help corporate finance reduce working capital dependence and improve overall cash performance. Auditoria allows organizations to regain thousands of hours the finance team would otherwise spend on administrative, transaction-based non-value-added tasks, helping to alleviate pressures and elevating the state of the finance back office. Improve the lives of finance teams everywhere, and give them superpowers using **Auditoria.AI** Follow Auditoria on [LinkedIn](#) and [Twitter](#) to stay connected.