

Exception Management Including Claims & Chargebacks

The Business case to Automate Exception Management

No matter how automated the order-to-cash process becomes; there will always be exceptions and issues that require human intervention. These exception transactions include disputes, claims, special arrangements, credits, and many others. Such exceptions are estimated to represent 15% to 20% of all business-to-business transactions.

Until now, exceptions about invoices have been labor-intensive, time-consuming, potentially damaging to customer relationship, and ultimately bad for business. With so many variables and so little control, the problems seemed intractable. That has changed.

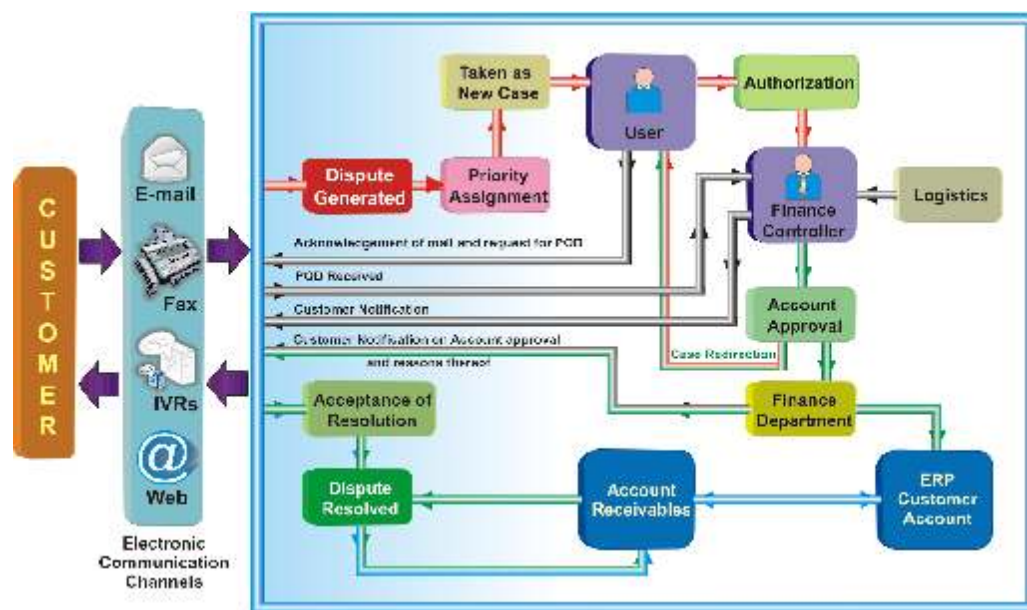
Advanced platform for Exception Resolution

The coAction platform couples the people, the process, and the technology in a comprehensive and coordinated system that can eliminate problem exceptions. It enables companies to reduce the errors that cause exceptions and increase the straight-through-processing (STP) rate on invoice reductions. It addresses internal challenges such as obtaining cross-functional cooperation, overcoming process inefficiency, ensuring timely access to information and succeeding with limited resources.

Manage the Information Challenge

Accumulating all the relevant information in a single view is one of the biggest challenges to the resolution of disputes, claims, and chargebacks. The coAction system presents

EXCEPTION RESOLUTION WORKFLOW



“Automation can reduce dispute management costs by 50%”

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consolidated electronic and non-electronic information from multiple internal systems, customer data, e-mails, faxes, and digital document images in a single container enabling quick resolution to exceptions.

Exception/Claims

There are typically a finite number of causes for the vast majority of exceptions. And for each cause, there are procedures for resolution - some formal and some informal. The information and documentation needed for favorable resolution of common dispute types can also be pre-defined.

Image Enabled Workflow

Multi-function devices can be configured to capture and route image data to a repository. Images such as supporting documentation for an exception can be submitted by customers over the web using any scanner, e-mail, or fax.

Case Management System

A comprehensive case management system provides the means to allocate work load, and work on a case with all relevant information from internal systems and operators along with relevant documents sent by the client with complete tracking history.

Work Queues

Work queues can be set up to map organization roles and responsibilities. Features such as manual overrides, escalation and re-route allows for dynamic allocation of work across organization departments.

Single Power View

Real Time Collaboration

Audit Trail & History

