ANTHROP\C

Claude Billing Agent: Agent that collaborates with A/R teams to expedite cash collection

Micheal Sihavong

Claude Billing Agent is an ambient agent that monitors open invoices with active dunning processes. The agent's objectives are to automate routine customer inquiry and accelerate payment collection for outstanding invoices before they reach the point of allowance for write-off. The agent addresses common, time-consuming tasks in the cash collection workflow that typically begin when a dunning notice is emailed to customers. Upon receiving customer responses, the agent can automatically handle standard requests such as:

• Correcting invoice billing addresses
• Processing due date extension requests
• Applying tax exemptions when valid certificates are provided

Before executing any material actions, Claude Billing Agent collaborates with finance teams by presenting its proposed actions, reasoning, and decision logic to A/R teams for approvals. This includes context-aware considerations such as whether an invoice falls within open versus closed accounting periods. Upon receiving approval, the agent executes the necessary ERP updates and re-issues dunning notices with corrected information.

Customer	Claude Billing Agent	Finance (A/R)	ERP System

Monitors customer inquiries against corresponding invoices

Billing details captured by A/R teams

Deliver dunning letters

alt 1 - Customer Payment
Reply to dunning with payment confirmation

Marks the Invoice as paid

alt 2 - Customer Requests
Reply to dunning with requests (tax exemption, address change, due date extension, etc.

Analyze request and determine actions

Request approval of suggested actions

Approves Claude's suggested actions

MCP
POST/record.update
POST/record.create
Performs suggested actions in ERP

MCP
POST/email
Re-trigger dunning

Deliver dunning letters

Reply to dunning with payment confirmation

Marks the Invoice as paid