



Where AI Fits in Your AR Department

Map the AR work your team does each week, then decide what AI should take on and what stays with your people.

Map your AR tasks

Write in roughly how many hours each task takes your team each week, then check where it fits. The grey note is a starting point. Some tasks don't need AI at all: a simple rule or schedule does the job.

AR task	Hours / week	AI handles	AI drafts, team reviews	Simple automation	People keep
PAYMENTS					
Matching payments to invoices Usually: AI handles, with a review queue	_____	☐	☐	☐	☐
Reading remittance from checks, emails, and PDFs Usually: AI handles	_____	☐	☐	☐	☐
Sorting out short pays: discounts, sales tax, bank fees Usually: AI handles, with a review queue	_____	☐	☐	☐	☐
Writing off small differences Usually: simple automation, under a threshold you set	_____	☐	☐	☐	☐
Applying early-pay discounts correctly Usually: simple automation	_____	☐	☐	☐	☐
Applying customer credits to open invoices Usually: simple automation	_____	☐	☐	☐	☐
Posting payments back to your ERP Usually: simple automation	_____	☐	☐	☐	☐
Checking that customer balances match your ERP Usually: simple automation, with an alert when they don't	_____	☐	☐	☐	☐
Replying to invoice and statement requests Usually: AI drafts the reply, your team reviews	_____	☐	☐	☐	☐
Taking card payments over the phone Usually: simple automation, so customers pay online	_____	☐	☐	☐	☐
Taking payment on a large order from a new buyer Usually: simple automation, with a one-time payment link	_____	☐	☐	☐	☐
Other: _____	_____	☐	☐	☐	☐

AI handles: AI does the work on its own, and anything it isn't sure about waits for review.

Simple automation: a rule or schedule does the job, with no AI needed.

AI drafts, team reviews: AI prepares the work, and a person approves it before it's final.

People keep: the work depends on judgment or a customer relationship.

Collections and credit tasks continue on page 2





Map your AR tasks: collections and credit

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AR task	Hours / week	AI handles	AI drafts, team reviews	Simple automation	People keep
COLLECTIONS					
Sending reminders before invoices come due Usually: simple automation	_____	☐	☐	☐	☐
Deciding which past-due accounts to work first Usually: simple automation, with a prioritized list	_____	☐	☐	☐	☐
Spotting customers whose payment habits are changing Usually: automation flags it, your team decides	_____	☐	☐	☐	☐
Choosing the channel, tone, and timing for follow-up Usually: AI recommends, your team decides	_____	☐	☐	☐	☐
Drafting past-due notices Usually: AI drafts, your team reviews	_____	☐	☐	☐	☐
Tracking promise-to-pay dates and why a job is behind Usually: your team logs it, automation follows up	_____	☐	☐	☐	☐
Collection calls on disputed or held-up jobs Usually: people keep	_____	☐	☐	☐	☐
Answering billing questions Usually: people keep	_____	☐	☐	☐	☐
CREDIT					
Running fraud and identity checks on new applications Usually: simple automation, the moment an application comes in	_____	☐	☐	☐	☐
Contacting trade references and pulling credit reports Usually: simple automation	_____	☐	☐	☐	☐
Following up on missing items in credit applications Usually: simple automation	_____	☐	☐	☐	☐
Setting credit limits and approving new accounts Usually: people keep	_____	☐	☐	☐	☐
Other: _____	_____	☐	☐	☐	☐

Before you hand a task to AI

Where AI Fits in Your AR Department

Ask two questions

If customers will see the result, will it improve their experience?

If they won't, will it save your team time without hurting service?

When the answers conflict, side with the customer relationship.

Make sure your team stays in control

☐ We choose how much AI does on its own, and we can change that.

☐ We can switch AI off at any time.

☐ We can see what AI did and override it when something looks wrong.

☐ Our team reviews anything a customer will read before it goes out.

About Dill

Dill is the credit-to-cash platform purpose-built for construction suppliers. Dill gives suppliers one platform for customer credit and accounts receivable, connected to the ERP they already use, and most suppliers are live in 2 to 6 weeks.

We're intentional about where we use AI. We built it to support your customer relationships by taking on manual work, like matching payments and drafting collection notices. You decide how much of that work AI takes on.

See how it works at usedill.com

"A lot of those tedious tasks have been taken off our hands... the volume has definitely diminished because of Dill."

Devin Moore

VP of Finance, Great Western Supply

"With Dill, we don't have to reach out to the 45-90 receivables as much. If I have to reach out to anyone, it's 90+."

Victoria Mitchell

Controller, Electric Supply