

CUSTOMER AGENTS

Drive Cash Performance | Increase Capacity | Operationalize AI



❖ CHALLENGES IN O2C: CUSTOM PROCESSES, UNGOVERNED EXECUTION

Enterprise Order-to-Cash processes are highly differentiated. Governance requirements, system environments, and operating structures vary significantly across industries, geographies, and business units. Yet most AI automation tools are built for generic workflows, leaving organizations unable to operationalize AI in ways that reflect their actual processes. Predictive insights remain trapped in dashboards rather than driving action, and IT bottlenecks slow every attempt at workflow change.



Custom O2C workflows not solved by off-the-shelf tools



Predictive insight stalls before reaching execution



Lack of AI tools with true O2C domain intelligence



AI initiatives lack explainability and auditability



Pressure to scale automation without losing control

❖ CUSTOMER AGENTS: READY-TO-BUILD CUSTOM AGENTS FOR O2C

Using Sidetrade's Agent Builder Studio, Customer Agents give enterprises and partners the power to build dedicated O2C AI agents from modular components such as data nodes, connectors, and automation capabilities. These agents are designed around company-specific credit, collections, dispute, and customer engagement workflows. Organizations select the appropriate intelligence level based on process complexity and desired autonomy, from guided Classic Agents through reasoning-led Smart Agents to Intelligent Agents with full Data Lake access and a configurable AI execution framework aligned to their data, governance model, and operating structure.

- **Classic Agents:** Nodes, connectors, tools, API calls, and email tasks for guided workflows
- **Smart Agents:** All the features of Classic Agents plus Aimie LLM access, portal login automation, and Agentic RPA
- **Intelligent Agents:** All the features of Smart Agents plus Sidetrade Data Lake access, Aimie Extract, and Embedded Calling with the full intelligence stack
- **Agent Builder Studio:** Build, configure, deploy, and monitor agent workflows across O2C.
- **Agentic Workflows:** Library of agent presets to kick-start intelligent, event-driven automation
- **Health Dashboard:** Performance analytics, workload distribution, cost monitoring, and alerts
- **Enterprise Connectors:** Pre-built MCP connectors for ERP, CRM, payments, and communications

❖ CUSTOMER AGENTS TURN O2C INSIGHT INTO ACTION

Customer Agents transform predictive intelligence into real business action by enabling organizations to automate and orchestrate complex order-to-cash workflows with control and confidence. Configurable for enterprise order-to-cash processes, these custom-built AI agents retrieve information, make decisions, communicate across systems, and execute tasks based on company-defined policies and governance requirements. By combining full auditability, configurable autonomy, and end-to-end workflow execution, Customer Agents reduce manual effort and accelerate decision-making. The result is greater consistency across teams and regions, with measurable impact on productivity, cash flow, and working capital performance.

FEATURES

Customer Agents are built and deployed inside Sidetrade's Agent Builder Studio, giving enterprises a governed, configurable framework for executing AI-driven O2C workflows at scale.

- Company-specific agent design without custom code or IT dependency
- Configurable autonomy with human-in-the-loop controls and full audit trails
- End-to-end execution across credit, collections, dispute, and engagement workflows
- Native access to Sidetrade predictive intelligence and O2C Data Lake
- Bi-directional ERP, CRM, and payments connectivity via pre-built MCP connectors
- Real-time performance, cost, and alert monitoring across all agent executions
- Composable workflows with conditional logic and exception handling
- Multilingual and multi-region operation across global O2C structures

Why Sidetrade

Differentiators with Impact

AGENTIC AI LEADERSHIP

Proprietary, domain-specific, AI called Aimie, with agents trained on actual buyer payment behavior, not generic LLMs

SECURE AND SOVEREIGN

Full data control and ISO 27001 / SOC 2 Type 2 certifications ensure compliance and confidentiality

UNMATCHED O2C DATA POWER

Only real-time O2C Data Lake globally – \$8.8+ trillion in transactions, 1B+ invoices, 42.2M+ buyers

PROVEN ROI

Faster time-to-value as O2C-tuned AI delivers 35–55% average productivity gains and double-digit cash acceleration across industries

BENEFITS

Customer Agents deliver the operational outcomes that matter most to enterprise finance teams: faster translation of predictive intelligence into measurable execution, agents built to reflect actual business processes rather than generic automation, and full auditability from design through deployment.

As part of the Sidetrade O2C Intelligence Platform, Customer Agents help organizations build and operationalize agentic AI across O2C with enterprise-controlled autonomy, governed workflows, and measurable working capital impact.

- Purpose-built for O2C, not horizontal AI
- Native Sidetrade intelligence and Data Lake access
- Composable architecture for real-world complexity
- Agents that retrieve, communicate, update, and escalate
- On-site co-build methodology for faster time-to-value
- Configurable autonomy with HITL controls and audit trails



About Sidetrade

Sidetrade (Euronext Growth: ALBFR.PA) is an AI-native Order-to-Cash (O2C) company. Its platform combines O2C applications, autonomous AI agents, and Aimie IQ, a natural-language intelligence interface that helps global organizations accelerate cash generation. Sidetrade operates the world's largest proprietary O2C Data Lake, built on more than 8 trillion in B2B transactions and millions of buyer entities. This data trains domain-expert AI models that continuously monitor, reason, decide, and act autonomously across the O2C cycle. Sidetrade serves businesses in 85 countries with 450 employees across Europe, North America, and Asia-Pacific. For more information, visit us at www.sidetrade.com and follow @Sidetrade on LinkedIn.



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