



The Future of Order-to-Cash: Scalable AI Agents for Supplier Portals



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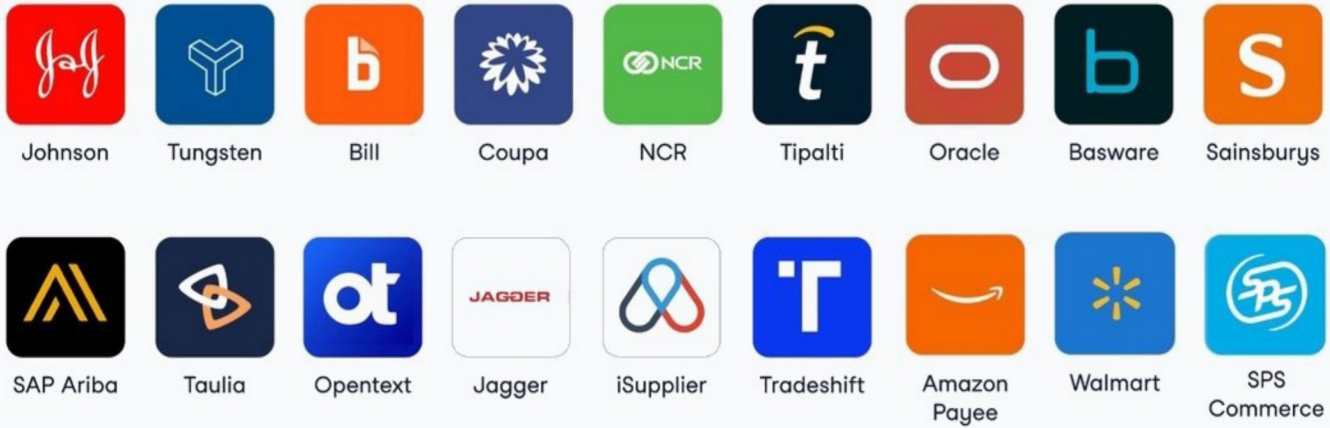
AGENDA

What you will learn

- Why Portals Are So Painful
- What are AI Agents?
- How Companies Solve It
- What Happens at Scale
- Measuring Cost & Success
- Is It Safe?
- *Try It Yourself (QR at the end)



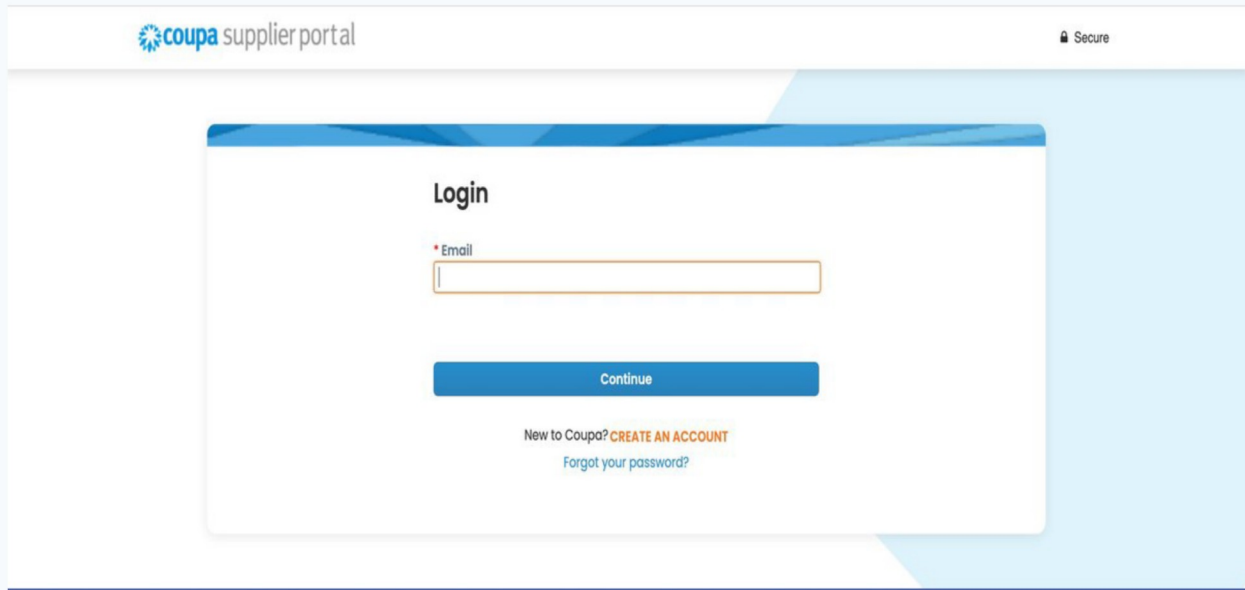
Customers are asking you to get paid through a portal.



Top 3 Supplier Portals



Looks familiar, right?



5 / 20



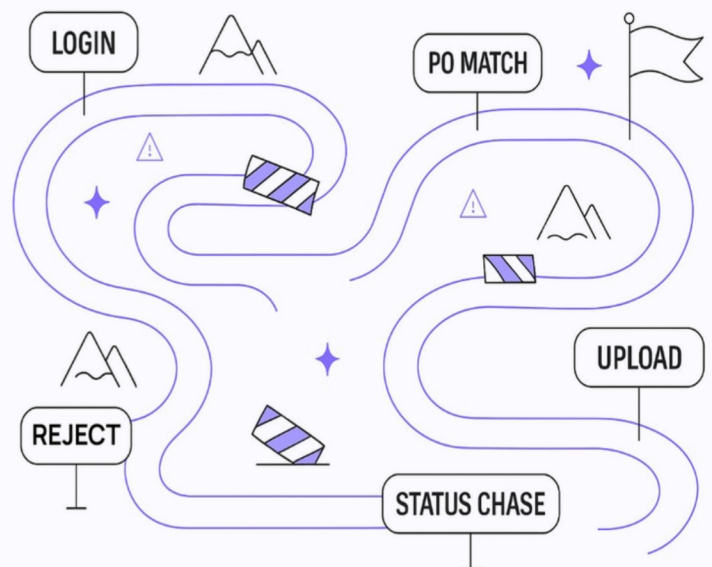
Why Portals Are Hard

The marathon

Registration → Logins/MFA → PO matching → Required fields → Uploads → Resubmits → Status chasing

The impact

- Payments take ~2x longer
- Frequent rejections & rework
- 0.5–3 FTEs tied to portal tasks
- Low visibility, frustrated teams



6 / 20



One Company's Reality

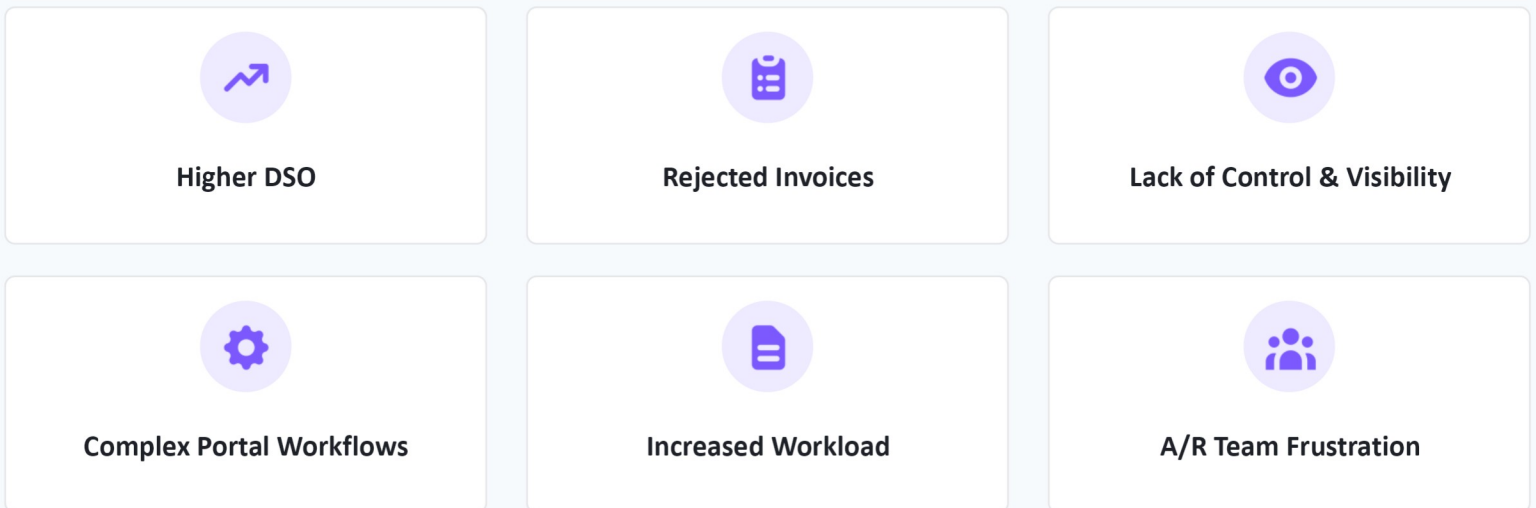
A supplier managing multiple AP portals tracked what happens every time they sign a new portal customer:



How do supplier portals impact your team? →

Based on real data from a supplier managing multiple AP portals

How Do Supplier Portals Impact Your Team?



Every new customer generates a new 'getting paid' workflow.

Shared Language



AI Agent:

A smart digital co-worker that is able to make decisions.



Web AI agent:

Logs in, fills forms, uploads docs — just like you.



API:

A direct system-to-system highway, when it exists.



RPA (bots)

Click recorders. Fast to start, fragile when portals change.

How Companies Tackle Portal Work?



Manual + BPO

Document steps per customer or portal to stay consistent.

✓ Solid base for automation

✗ Slow and doesn't scale



RPA / Bots

Automate simple, stable tasks with scripts.

✓ Quick wins for repetitive work

✗ Breaks when portals change



AI Agents (Web)

Goal-driven automation that adapts and runs end-to-end.

✓ Handles full workflows across portals

✗ Needs setup and human oversight

When You're Still Manual, **Work Like a Pro**



Create a knowledge base

One source of truth for all portal customers' processes



Minimize time to invoicing

Every day counts!



Mark portal customers

ERP checkbox; one mailbox



Manage credentials wisely

Use a digital vault for passwords, and always configure 2FA



POs Proactive Management

#1 cause for portal rejections



Charge portal customers

Recommended for low \$ amount invoices

When Bots **Make Sense**



Handle uploads and routine tasks



Expect portals to keep changing



Stay in control with alerts

When Agents Take Over the Process



Goal-based automation

Understands intent, reasons, and context



Process unstructured data

Emails, PDFs, charts, etc.



Adaptive to change

Learns from feedback, errors, and new rules

13 / 20



Scaling Reality — Every Customer Is Different

Same portal ≠ same rules

Every new customer = new workflow

Agents must adapt to UI changes

Governance gets harder as volume grows

How many customers do you portal-invoice today?

14 / 20



When Agents Deliver Results — How to Measure Them?



Setup cost

time spent defining SOPs, rules, and templates



Maintenance cost

effort to fix issues, adapt, and handle exceptions



Performance

success rates, time to submit/accept, exception handling, DSO impact

When Agents Scale — Manage Risks & Security



Identity & access

Apply least privilege, use SSO where possible, and keep audit logs



Agent reliability

Balance automation with guardrails, retries, and human review



Data handling

Minimize PII, encrypt in transit and at rest, and isolate tenants



MFA strategy

MFA remains the simplest and most effective protection



Prompt injections

Watch for manipulated prompts as agent adoption grows



Compliance

Maintain a strong SOC 2 / ISO security posture

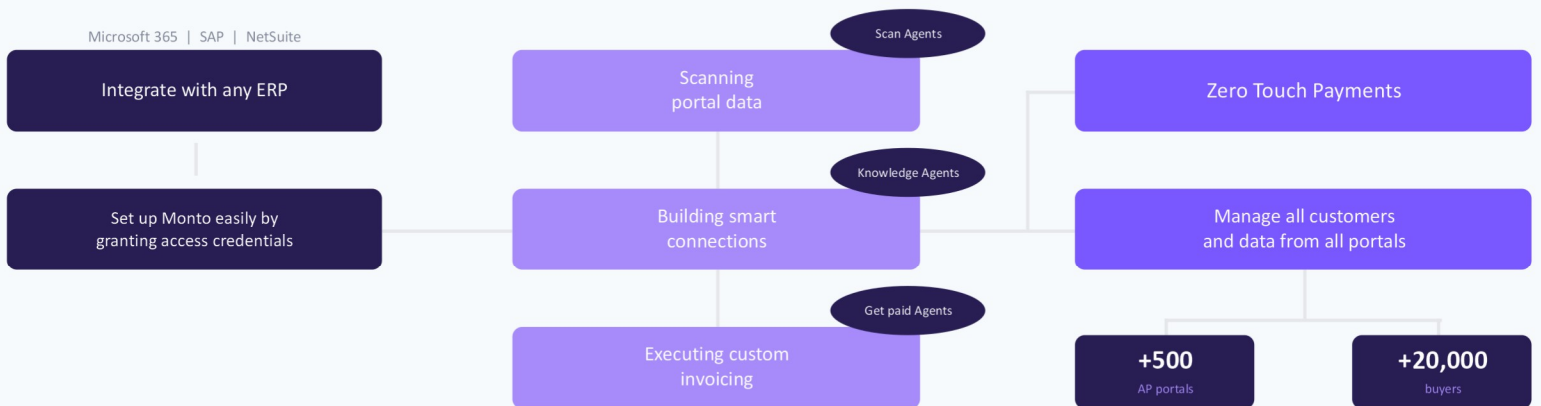
Monto's AI Agent Solution



- ◆ Monto learns each buyer
- ◆ Supplier <> buyer unique connection

- ◆ Not just an integration
- ◆ Easy as tapping a credit card

Here's how the Monto magic works:



How You Can Do It Yourself

- GPT Best Practices
- Monto's AI Agents Solution



Scan to get the DIY mini-guide

19 / 20



May your invoices always
be paid on time :)

Thank you!

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