

Quote-to-Cash

TRANSFORM PROCESSES FROM SALES TO FINANCE ON THE APPIAN PLATFORM

Appian was using email-based processes and manual forms for the quote-to-cash process. A solution was needed to help automate and standardize workflows, dynamically adapt changes in pricing and product SKUs, and handle multi-level approvals to ensure quote consistency. Off-the shelf solutions were too rigid and inflexible to meet the unique requirements, so Appian turned to the Appian platform for a solution.

The quote-to-cash application brings together previously siloed systems for finance and operations—filling in process gaps with customization and provides an intuitive interface for users across departments.

SALES

Sales is increasing efficiency throughout the quote generation process to get contracts to customers faster.

- Automated pricing approvals and standardization **saves time going back and forth with legal**
- The application dynamically prices orders, routing through sales management and legal approvals, **to ensure pricing is right**
- Executable contracts are generated containing contact information, product and service items, and legal terms, ready to send to customers

LEGAL

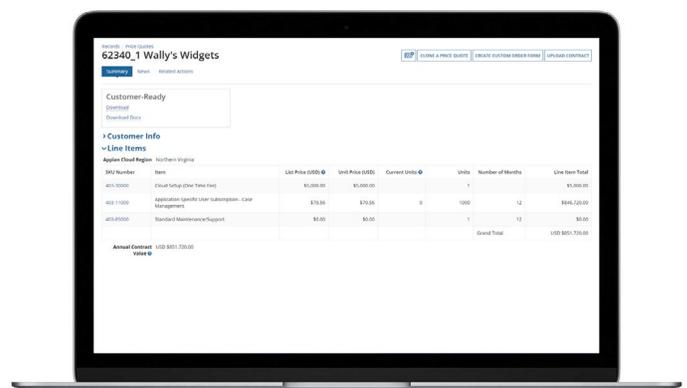
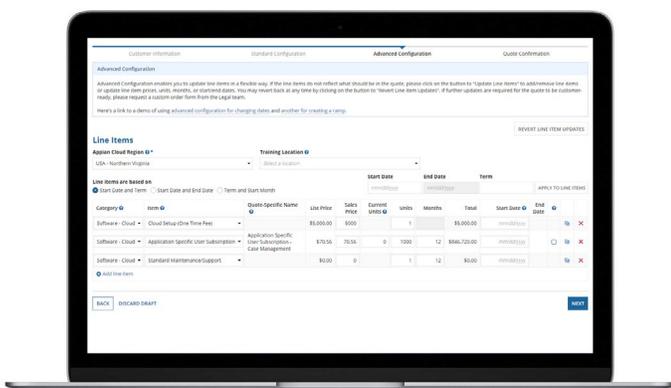
Automation capabilities have simplified processes and contract onboarding for the legal team.

- The application automatically generates legal documents, auto-fills elements of order forms, and routes approvals if needed
- The process of onboarding contracts has been reduced from 3 steps to 1 step—**saving over a hundred hours a year** for the legal team
- An audit trail aids in team collaboration and gives everyone visibility into actions already taken, and those that need to be taken going forward

FINANCE

Streamlined workflows in finance allows for improved accuracy and faster time to close books.

- The former order input process that took 3 days **now takes only an hour with automation**
- Manual entry of contract information has been replaced by a direct integration into the accounting system/ERP, reducing errors and labor hours
- This has revamped the revenue recognition process, **reducing time to close by days**



CAPABILITIES INCLUDE:

- **Dynamic Pricing:** Automatically populates customer and order information into quotes from source systems and intuitively prices deals
- **Approval Routing:** Easily manages routing of reviews and approvals for non-standard pricing, terms, and conditions
- **Standardization:** Simplifies and standardizes product and service offerings for quotes, even as SKUs, prices, and requirements need to adapt over time
- **Executable Contracts:** Dynamically generates contracts with specific legal terms, producing signature-ready documents
- **Collaboration:** Improved visibility and task hand-offs across sales, legal, and finance teams
- **Integration:** Easily integrates with existing ERP, CRM, and financial systems

HOW OTHER ORGANIZATIONS ARE USING APPIAN FOR THE QUOTE TO CASH LIFECYCLE:



Quote & Configure: A global telecom company delivered a quote-to-cash application used for **sales quoting on mobile devices**, complex setup configurations and validations by solution engineers, and finance team contracts, billing, and collections.



Customer Order Management: A leading manufacturer delivered an application to the customer service team that provides a unified view of customer orders, ability to proactively communicate on status, and **improves the speed and quality in resolving order inquiries**.



Revenue Recognition: A pharmaceutical solutions organization manages revenue recognition processes, including calculations and approvals around product delivery, cost, and change orders, to improve accuracy and **ensure compliance with financial regulations**.



Contracting: A large paper and packaging organization deployed a mobile app for sales to generate quotes and process contracts on their mobile devices, **leading to 50% increase in new contracts** and the ability for new contract on-boarding to be completed in a single day.

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Appian

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