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- Manual entry of contract information has been replaced by a direct integration into the accounting system/ERP, reducing errors and labor hours.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 and 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.

Discover all that you can build with the Appian Platform:

appian.com/supplychain