

Enterprise Finance Team Delivers Business Value and Revives Operational Efficiency With AgentCreator

30% faster

Shortened the month-end close process

90% less time

Major reduction in time spent reviewing contracts

2% recouped

Millions of dollars in annual revenue recovered

HEADQUARTERS

San Mateo, CA

INDUSTRY

Technology

DEPARTMENT

Finance & Accounting

USE CASE

Build an application to scan order forms monthly to calculate ARR based on active customer agreements

CHALLENGE

The discrepancy between customer data from order forms (PDFs) and saved within internal systems required monthly review and reconciliation

SOLUTION

Use AgentCreator to automate the identification and extraction of specific unstructured data from PDFs

BUSINESS RESULTS

- 30% shorter month-end close process
- 90% reduction in manual effort reviewing and reconciling data
- Immediate recovery of up to 2% revenue equaling millions of dollars

INTEGRATIONS

SnapLogic iPaaS with AgentCreator, Salesforce, Amazon S3, Pinecone, Box, Amazon SQS, Amazon Bedrock, DocuSign

Backstory

The financial data in CRM and billing systems is often inconsistent with data in final sales contracts. This discrepancy can result in recognition delays and ultimately unrecovered revenue, costing companies across industries between 1-5% annually, on average.

The Challenge

The SnapLogic finance and accounting teams use data from customer order forms as the source of truth to calculate revenue figures such as annual recurring revenue (ARR) and annual contract value (ACV). These forms are saved as signed PDFs and filed in a Box folder. Then the contract data is entered into fields within the Salesforce customer account at the time of purchase, making it available as structured data for reporting and account inquiries.

However, if there are discrepancies between what's saved in the original order form and what's populated in Salesforce, financial reporting could be inaccurate, requiring manual due diligence to correct.

Examples of financial data discrepancies:

- **Multi-year/co-termed deals** — Opportunity indicates a specific close date. The terms include a multi-year deal with some components co-termining at different dates, per order form.
- **Calendar year vs. fiscal year** — Contract is signed and opportunity closes in January of calendar year 2024, the company's last month of fiscal year 2023. However, annual terms correspond to the subscription start date, February 2024 (calendar year and fiscal year aligned), and logged for annual renewal in February 2025. According to SFDC, there was no booking in FY 24.

Reconciling and validating ARR requires manual data review and ongoing management from the team to ensure consistent and accurate billing and reporting. This is especially time-consuming with multi-year and co-termed deals. The process was compounded by continued business growth and would be challenging to scale.

The Solution

SnapLogic AgentCreator enables users to build GenAI-powered assistants, applications and agents of all levels of complexity, to automate operations and streamline data processes.

After working with a customer to automate a similar process using AgentCreator, SnapLogic embarked on a journey to empower the finance and accounting teams with an application of their own.

They set out to build an app that automates the identification and extraction of unstructured data from PDFs (customer contracts) and reconciles that information with structured customer data in the CRM to make sure outgoing invoices match what's in the original order forms.

Business Results

The project's objective was to improve the ARR reconciliation and validation process. Before

implementation even began, the team identified and resolved operational inefficiencies that were impeding progress. Since resolving those issues, the finance department quickly went live with the solution and began seeing immediate benefits, including:

- Accurate, board-of-directors-ready data and reporting from the system of record and SFDC for multiple use cases
- Resolved existing and potential discrepancies between numbers on PDF documents and those saved in billing and CRM systems
- Substantially reduced unscalable manual time and effort reconciling ARR data and updating fields in SFDC
 - 30% faster month-end closing process
 - 90% reduction in manual effort reviewing and reconciling every customer order form

As a bonus upon going live, the finance and accounting teams were able to immediately recover around 2% of revenue, translating to millions of dollars in recouped cash that may have gone uncollected. Now the foundation is built to identify and pursue new revenue opportunities with existing customers, creating a tangible and ongoing return on investment.

Using AgentCreator internally, the finance department can further automate tasks and build a feedback loop with the product team for further optimization and innovation within the platform.

"Using AgentCreator has been a multi-faceted success. It saves time and effort for our finance and accounting teams, helping us identify and recover potentially lost revenue. We also uncovered some process challenges that enabled us to improve our finance operations as a whole."

– Nicole Houts, Sr. Finance Manager at SnapLogic

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