**Guidance Document: Commercial**

Automated Commercial Invoices





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1. **Overview**

1.1 The Commercial Team requires invoices to be produced for each customer on the 15th of each month. All orders received between the 15th of the current and previous months must be billed to generate revenue for the department.

1.2 This business process improvement project aims to address the delays associated with the generation, transformation, and delivery of commercial invoices. The benefits of which are the savings of 30 hours of manual processing time per month, reducing the time spent issuing invoices by 96.8%.

1.3 The requirements for an invoice were as follows:

* A raw data spreadsheet of all received orders
* An invoice sheet where expenses were billed either by the unit or suite

1.4 This was achieved using 2 flows capturing 5 precise SQL reports. The results of which are delivered to Enquiries.Commercial inbox before issuing to customers.

1.5 Data from LIMS relating to commercial customers was extracted using Business Objects and received in David.Golacis’ inbox on the 15th of each month.

Keywords from the email’s title activated a Power Automate flow, allowing the attached XLSX file to be saved to OneDrive. The files were processed and transformed in the cloud using 2 TypeScript programmes per flow.

**2.0 Maintenance**

2.1 A yearly template of the relevant customer’s quote sheet must be updated upon contract renewal. The location of this spreadsheet is provided below.

**Teams: Commercial Team/ Documents/ General/ Admin/ Invoices**

2.2 As of present, this quote is only used to calculate the analytical costs of 2 customer’s routine orders. Eden Springs