**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 commercial invoices by 96.8%.

1.3 The requirements for an invoice were as follows:

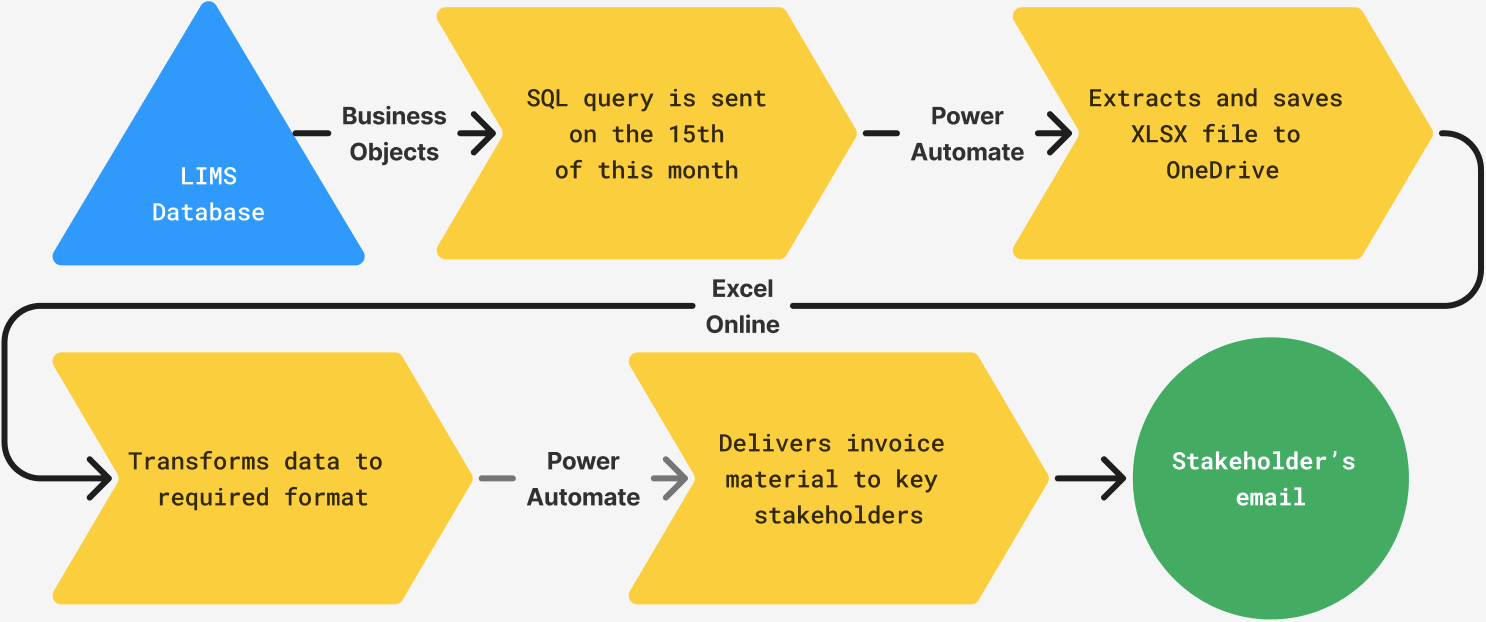
* A raw data spreadsheet of all received orders within the last billing cycle
* An invoice sheet where expenses were billed either by the unit or suite costs

1.4 This was achieved using 2 flows capturing 5 precise SQL reports. The results of which were delivered to Enquiries.Commercial inbox where the material can be reviewed 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 through Excel Online API calls.

1.6 Process map for the order of operations:



**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:

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

2.2 As of present, this quote is only used to calculate the sum of analytical costs for 2 customers. These customers were Eden Springs and ELGA 2030.

**3.0 Data Governance**

3.1 All Business Objects files (SQL reports) are stored online at [Affinity's BO Portal](https://boe.grpdom.vwuk.corp/BOE/BI) within this location:

**Public Folders/ Sample Manager/ Invoicing**

A computer screen shot of a list

AI-generated content may be incorrect.

3.2 Queries, flows, and Office scripts are provided in the appendix.

**4.0 Detailed Design**

**4.1 Design of reports**

4.1.1 Business Objects generated and delivered scheduled queries from an Oracle database.

4.1.2 From the database, the following 3 tables were used:

These were inner joined together to minimise the chance of anomalous records from being included. Records which did not comply with all constraints were eliminated without requiring additional lines of SQL.

The following database features were used throughout this project:

4.1.2 These queries shared identical constraints which restricted the data pulled from the cloud, reducing the server’s memory usage which decreased querying time.

4.1.3

**4.2 Design of flows**

**4.3 Design of scripts**

**5.0 Appendix**

5.1 Business Objects material

5.1.1