Operations Reference Pack

Salesforce • ERP (BEAMS/Beams ERP) • Marketing • Invoicing • Tenders • Orders • Returns • Purchase Orders

This is a practical, editable reference you can share internally. It includes checklists, field lists, and copy-paste templates to help you build SOPs and APIs.

What’s inside	Templates + quick checklists (not legal advice).
Best use	Draft SOPs, align teams, and design database/API payloads.
How to customize	Replace placeholders like <COMPANY_NAME>, adjust VAT/terms, and add approvals for your workflow.

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1) Salesforce for API making

A fast way to design a clean API is to map your Salesforce objects first, then standardize payloads.

Common objects in quoting/invoicing

- Account (customer/company)
- Contact (person)
- Opportunity (deal/project)
- Quote + QuoteLineItem (pricing and lines)
- Product2 + PricebookEntry (catalog + price)
- ContentVersion / ContentDocumentLink (files like PDFs)

API building checklist

- Choose auth: OAuth client credentials / JWT (server-to-server) / user OAuth (interactive).
- Decide identifiers: Salesforce Id vs external keys (recommended: store both).
- Normalize currencies, decimals, and date formats (ISO-8601).
- Use Composite API / Bulk API when syncing many records.
- Add retry + idempotency (e.g., Idempotency-Key header, store request hashes).

Example REST payload (Quote + lines)

Tip: keep server payloads stable even if Salesforce fields change.


```
{ "quote": { "externalRef": "Q-2026-00021", "accountId": "001XXXXXXXXXXXX",
"opportunityId": "006XXXXXXXXXXXX", "currency": "AED", "status": "Draft",
"paymentTerms": "50% IN ADVANCE & 50% ON DELIVERY" }, "lines": [ {"productCode":
"AVF28-373", "qty": 10, "unitPrice": 125.00, "imageUrl": "https://..."},
{"productCode": "XYZ-100", "qty": 2, "unitPrice": 980.00} ] }
```

2) BEAMS / Beams ERP

You mentioned “BEAMS ERP”. There are multiple products called BEAMS/Beams. Use this section to capture the right schema for your system.

If you mean BEAMS as a government budget system

- It is usually role-based: Admin, Controlling Authority, DDO (drawing & disbursing officer), etc.
- Core entities: budget heads, allocations, fund transfers, bills/payments, approvals, audit logs.
- Key API needs: role permissions, approval workflow state, document attachments.

If you mean Beams ERP (typical business ERP)

- Modules often include: HR/Payroll, CRM, Inventory, Sales Orders, Purchasing, Accounting, Projects.
- Ask vendor for: entity-relationship diagram (ERD), API docs, and export views (CSV/JSON).
- Minimum entities for integration: customers, products, stock, orders, invoices, payments, users/roles.

What to request from vendor	1) ERD/schema 2) API endpoints 3) Webhook/event list 4) Auth method 5) Rate limits
Your integration output	A stable internal schema + adapters that map ERP fields to your schema.

3) Marketing – ready-to-fill templates

Use this one-page plan to align your team and set measurable targets.

One-page marketing plan (fill in)

Goal (90 days)	<e.g., 200 qualified leads, 20 closed deals>
Ideal customer	<industry, location, budget, decision maker>
Core offer	<what you sell + main promise>
Positioning	<why you vs competitors>
Channels	SEO, Google Ads, Instagram, LinkedIn, WhatsApp, referrals
Lead magnet	<catalog PDF / free consultation / sample kit>
KPIs	leads/week, CAC, conversion %, revenue, repeat rate

Weekly content calendar (simple)

- Mon: product highlight + 1 customer problem it solves
- Wed: case study / before-after / project photo
- Fri: FAQ video (delivery, warranty, returns, payment terms)
- Sat: offer/promo + call to action

4) Invoice making – UAE VAT checklist

This section is a practical checklist. Always align with the latest FTA guidance and your accountant.

Invoice fields checklist

- Invoice title: “Tax Invoice”
- Invoice number (unique, sequential) and invoice date
- Supplier: name, address, TRN
- Customer: name, address, TRN (if VAT registered)
- Description of goods/services + quantity/unit
- Unit price, VAT rate, VAT amount, gross total (AED)
- Discounts (if any)
- Payment terms and bank details (optional but recommended)

Template (copy/paste skeleton)

```
TAX INVOICE Supplier: <COMPANY_NAME> | TRN: <TRN> | Address: <ADDRESS> Customer:
<CUSTOMER_NAME> | TRN: <CUSTOMER_TRN> Invoice No: <INV-000123> Date: <YYYY-MM-DD>
Items: 1) <ITEM> Qty <QTY> Unit <UNIT> Price <AED> VAT 5% Line Total <AED> Subtotal:
<AED> Discount: <AED> VAT: <AED> Grand Total: <AED> Payment Terms: <...>
```

5) Tender creating – ITT / RFP template

Use this structure for most tenders. Keep requirements measurable and evaluation transparent.

ITT / RFP structure

- Cover page: project name, tender ID, submission deadline, contact
- Background: who you are, problem statement
- Scope of work: deliverables, exclusions, assumptions
- Technical requirements: specs, standards, acceptance criteria
- Commercials: pricing format, payment schedule, warranty
- Supplier response format: company profile, approach, timeline, team
- Evaluation criteria: weights (price/quality/time/support)
- Legal/terms: confidentiality, data protection, governing law
- Appendices: drawings, BOQ, templates, forms

Evaluation checklist (quick)

- Compliance: all mandatory docs submitted?
- Technical match: meets specs + acceptance criteria?
- Risk: delivery timeline realistic? dependencies?
- Support: after-sales, SLA, spares, training
- Commercial: total cost, payment terms, exclusions

6) Order making – sales order flow

Typical flow: Quote → Sales Order → Delivery Note → Tax Invoice → Payment → Warranty/Service.

Sales order fields (minimum)

- Order number + date
- Customer + delivery address
- Reference quote / opportunity
- Item lines: SKU/product code, qty, unit, unit price
- Delivery schedule (date/time) + notes
- Status (Draft / Confirmed / Delivered / Closed)

API notes

- Keep order state machine explicit (don’t infer from dates).
- Store external references for idempotent updates.
- If images exist per line item, store imageUrl as optional field (nullable).

7) Return items policy – template

This is general wording. Get legal review before publishing publicly.

Return & refund policy (editable)

- Eligibility window: Returns accepted within <X> days from delivery.
- Condition: Items must be unused, in original packaging, with invoice/receipt.
- Non-returnable: Custom-cut items, installed items, clearance items, special orders (unless defective).
- Defects/Damages: Report within <48 hours> with photos; we will replace/credit after inspection.
- Process: Contact <support@...> with invoice no. and reason; we will issue a return authorization (RA).
- Refunds: Approved refunds processed within <7-14> business days via original payment method.
- Fees: Restocking fee of <X%> may apply for non-defective returns.

8) Purchase order making – template + workflow

Use a PO to control spend, track deliveries, and match invoices (3-way matching).

PO approval workflow (simple)

- Requester drafts PO
- Manager approves (budget check)
- Finance approves (vendor + tax + terms)
- PO sent to vendor
- Goods received (GRN)
- Vendor invoice matched to PO + GRN → payment

Purchase Order template (skeleton)

```
PURCHASE ORDER PO No: <PO-000123> Date: <YYYY-MM-DD> Vendor: <VENDOR_NAME> | TRN: <TRN>
| Address: <ADDRESS> Ship To: <WAREHOUSE/PROJECT> Lines: 1) <ITEM/SKU> Qty <QTY> Unit
<UNIT> Unit Cost <AED> Line Total <AED> Subtotal: <AED> VAT: <AED> Total: <AED>
Delivery Date: <YYYY-MM-DD> Payment Terms: <...> Approved by: <NAME/SIGN>
```

Appendix – sample JSON + glossary

Sample optional image field (recommended pattern)


```
{ "productCode": "AVF28-373", "name": "Wallpaper – Indigo", "imageUrl": null, "tags":
["plain", "blue", "vinyl"] }
```


Glossary

- TRN: Tax Registration Number (UAE VAT).
- GRN: Goods Receipt Note (proof of receiving goods).
- 3-way match: Match PO, GRN, and vendor invoice before paying.
- Idempotency: same request repeated does not create duplicates.