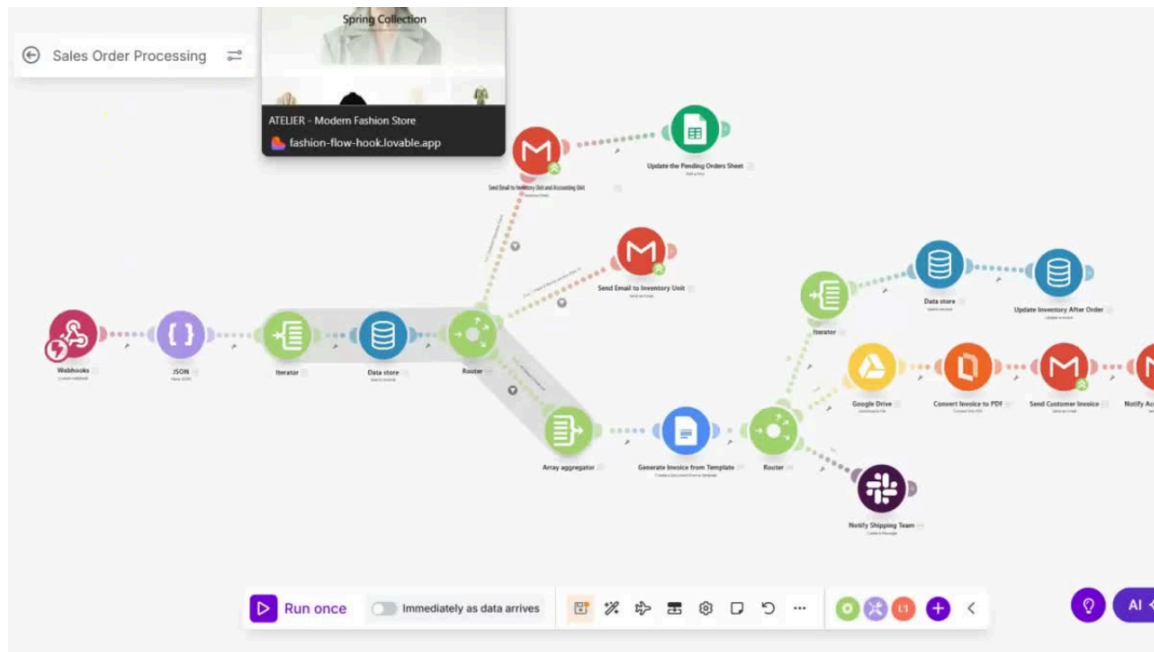


## Sales Order Processing Automation

### Category:

Sales / Operations Automation

### Image/Thumbnail:



### Detailed Description:

The Sales Order Processing Automation is designed to streamline the end-to-end order management workflow for retail and eCommerce businesses. Built using Make.com, it automates the process from order placement to invoicing and stock updates. This ensures faster fulfillment, fewer manual errors, and improved communication between departments and customers.

When a customer places an order, the system validates available stock, generates packing and shipping instructions, updates inventory in real-time, and forwards invoice details automatically to the accounting system. The automation also sends confirmation emails to customers and notifications to logistics and accounting teams, ensuring transparency and accountability at every step.

### How It Works (Functionality):

1. Trigger (Webhook): The workflow begins when a customer places an order through a webhook connection.
2. Parse JSON Data: The incoming order details are parsed from JSON format.
3. Feeder: Iterates through each order item.

4. Stock Validation: The system searches the Data Store ('Sales Stock Keeping') to check product availability.
5. Conditional Routing:
  - If the quantity ordered exceeds stock, send alert email to inventory and accounting teams.
  - If stock levels are low ( $\leq 10$ ), send a restock alert.
  - If all items are valid, proceed to invoice generation.
6. Invoice Generation: Automatically creates a Google Docs invoice from a predefined template.
7. PDF Conversion: Converts the generated document to PDF using PDF.co.
8. Email Notifications: Sends:
  - Invoice and confirmation to the customer.
  - Invoice copy to the accounting team.
  - New order alert to Slack for the logistics team.
9. Inventory Update: Automatically deducts sold quantities from the Data Store stock levels.

#### **Tools Required:**

- Make.com (Integromat)
- Google Docs (for invoice templates)
- Google Drive (to store generated invoices)
- PDF.co (for document conversion)
- Gmail (for email notifications)
- Slack (for internal team notifications)
- Make.com Data Store (for inventory management)

#### **Size of Project:**

Large — This automation includes more than 10 modules and multiple routing conditions.

#### **Setup Requirements:**

- Create a Make.com scenario and connect the required modules.
- Set up a Webhook trigger for incoming orders.
- Configure Data Store named 'Sales Stock Keeping' with fields: Product Name, Product ID, Unit Price, In Stock.
- Connect Google, Slack, and PDF.co accounts.
- Create a Google Docs invoice template and specify placeholders (e.g., Customer Name, Address, Items, Prices).
- Ensure Gmail API and Slack OAuth connections are authorized.

#### **Deployment Time Estimate:**

Approximately 4–6 hours for base setup. Up to 2 days with template customization and testing.

### Value Proposition:

This automation reduces manual order handling time by up to 70%, minimizes stock errors, and ensures customers receive accurate and timely order confirmations. Businesses can expect significant savings in administrative hours and improved operational accuracy.

### Demo Video:

[https://drive.google.com/file/d/16CVenGMnvOXId6dUlCk\\_7rj3Shh\\_w3kA/view?usp=sharing](https://drive.google.com/file/d/16CVenGMnvOXId6dUlCk_7rj3Shh_w3kA/view?usp=sharing)

### Known Limitations:

- Requires Make.com Pro plan for multi-step scenario execution.
- Dependent on Google API quotas for document generation and email sending.
- PDF.co connection may have rate limits on free plans.

### Testimonials / Use Cases:

Used successfully by small retail businesses to manage online orders efficiently. During testing, order confirmation time was reduced from 30 minutes to under 3 minutes per transaction.

### Size Classification:

Large

### Estimated ROI:

Assuming 100 orders/month and 10 minutes saved per order:

$100 \times 10 \text{ minutes} = 1000 \text{ minutes saved } (\sim 16.6 \text{ hours/month}).$

At \$25/hour = \$415/month saved in manual labor, excluding error-related savings.

### Version & Updates:

v1.0 — Initial release

v1.1 — Added automated PDF conversion and Slack notifications