## salesforce

# Building a Custom Application on Lightning Experience

Our Customer, Aquaread manufacture a wide range of precise, scientific water testing equipment that is designed for intuitive operation. They specialise in multiparameter water testing equipment and highly precise water level and temperature loggers. Their water testing instruments are suitable for testing groundwater, surface water and waste water. They are made from rugged materials to withstand harsh environmental conditions and all types of water.



## What bothered them

- Client wanted this project to create order, keep track of all the orders, generate invoice and delivery notes.
- They want to automate their process. To add all products automatically in invoices and delivery notes.

## What we did

- As initially customer bought professional edition and we were not able to create automated task in professional edition we asked client to upgrade edition.
- When PE is upgraded into EE we started automated task as we are already done with the configuration  $\checkmark$ part as per the client requirement.

## Value we offered

Client wanted to generate invoice and delivery notes in the form of pdf. We used conga composer. In conga composer client can easily generate, download and save the pdf in salesforce attachment.

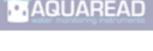


### **Quotation Template:**

QUOTATION Quote Ref: 00000056 Issue Date: 12/10/2017 Prices in GBP

Te: Geotechnics Limited The Geotechnical Centre 203 Torrington Avenue Coventry Warwickshire United Kingdom CV4 9AP

FAO: Paul Haves Tel: 07736296950 Faic Email: phayes@geotechnics.co.uk



Aquaread Limited **Bridge House** Northdown Industrial Park Broadstairs, Kent CT10 3JP ENGLAND. Tel:-44 1843 600 030 Email: orders@aquaread.com



Quote Validity: 30 days Issued By: Ryan Cox

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£780.00	10%	• •	£702.00
£15.00		1	£15.00
		ltems Total:	£717.00
		VAT:	£143.40
		Gross:	£860.40
4	iver To:	iver To:	items Total: VAT: Gross:

Coventry Warwickshire United Kingdom CV4 9AP

Chester Saltney United Kingdom CH4 8R

### QUOTATION Quote Ref: 00000056 Issue Date: 12/10/2017 Prices in GBP

Terms of Payment: PREPAIMENT All orders are subject to our terms and conditions below. EBOE.

### AQUAREAD LTD COMPANY INFORMATION

Account Name: Acuaread Limited Bank Name: National Westminster Bank PLC Sort Code: 52-10-19 Account No.: 10617965 IBAN: G667 NWBK 5210 1910 6179 65 BIC: NWBKG82L

Company Registration No. 06734328 VAT No. 942 9884 70

### AQUAREAD\*\* LTD STANDARD TERMS & CONDITIONS OF CONTRACT 1.1 Preamble

a) Aquaread Limited, (hereinafter referred to as "the Seller") submit all quotations and price lists and accepts all orders verbal or written subject to the following conditions of Contract which shall apply to all goods supplied or work done by the Seller, its servants, agents or sub-contractors to the exclusion of all other representations, conditions and warranties, statutory or otherwise expressed or implied.

### 1.2 Acceptance of Order

- a) Each order received and accepted by the Seller will be deemed to form a separate contract to which these conditions of sale shall apply and any waiver or any act of non-enforcement or variation of any terms or part thereof on the part of the Seller shall not bind or prejudice the Seller in relation to the application of these conditions to any other order, instalment or delivery whenever arising.
- b) The Seller reserves the right (without prejudice to any other remedy) to cancel any uncompleted order or to suspend delivery in the event of any of the Purchaser's commitment with the Seller not being met, or if the Seller is of the opinion that such commitments will not be met by the Purchaser,

### 1.3 Delivery, Risk & Title

- a) All delivery dates are quoted in good faith but time shall not be deemed to be of the essence. The Seller shall not be liable for any loss or damage (whether direct or consequential) whatsoever arising from late delivery of goods or materials and the Purchaser shall not be entitled to treat the contract as repudiated by reason of any such late delivery.
- b) Delivery shall be deemed to take place when the goods arrive at the Purchaser's designated delivery address and all risk in the goods shall pass to the Purchaser upon delivery, title to the goods shall pass upon payment.



### QUOTATION Quote Ref: 00000056 Issue Date: 12/10/2017 Prices in GBP

AQUAREAD

### 1.4 Cost Insurance and Licences

- costs.

### 1.5 Price

### 1.6 Cancellation

of postion.



c) No liability will be accepted by the Seller in respect of damage to or shortage of goods unless a separate notice in writing is given to the carriers concerned and to the Seller, giving full details, within twenty-one days of date of invoice or delivery if earlier. The Seller shall have no liability in respect of damage or shortages caused by the acts or proissions of the Purchaser or of others or by causes beyond the Seller's control.

d) The Seller's liability in respect of goods supplied shall be only to the Purchaser and shall be strictly limited to free replacement of goods notified as above and returned, carriage paid, to the Seller's works provided always that the Purchaser shall not be entitled to receive, from the Seller, any greater benefit under the provisions of this clause than shall be recovered by the Seller under any guarantee or warranty given to the Seller by the Manufacturers or Suppliers of the component parts of the equipment.

e) If the Purchaser shall enter into liquidation or receivership or composition with its creditors or upon any breach of its obligations herein whether as to payment or otherwise the Seller may (without prejudice to any of its other rights and remedies) by notice in writing revoke the Purchasers authority to sell such goods and materials as aforesaid and recover and resell any or all of such goods or materials and may enter upon the Purchasers premises for the purpose. f) Nothing herein shall give the Purchaser the right to return goods to the Seller.

a) Seller will obtain and pay for all necessary export licences or clearances and the contract will not come into force unless and until the Seller has received them. Purchaser will be responsible for obtaining and payment for all insurance and import licences at the country of destination. Purchaser shall also be responsible for all other cost of sale after delivery to the Free on Board (FOB) point including without limitation, duties, taxes, freight, insurance, shipping and handling

b) Notwithstanding any or all of the foregoing, it is understood by the parties hereto that the schedule for supply of equipment and services under the contract shall be extended for the period of time required by the Seller to obtain any HMG approval and furthermore Seller shall be excused under the contract any liability whatsoever in the event that any such required licence and/or other approvals are not granted to Seller after Seller has made all reasonable effort to obtain such licences and/or other approvals.

a) All prices quoted are F08 at Sellers facility unless otherwise agreed upon. Any prices quoted are exclusive of, and may be adjusted for any Tax or Duty thereon and may be increased for the supply of any quantity smaller than that quoted for.

a) Should Seller fail to deliver goods or services contracted within a reasonable time of the acknowledged delivery date, Purchaser may give 90 days written notice to Seller of his intention to cancel the undelivered portion of the order. The Purchaser shall pay Supplier in full the balance of the order price for all equipment and services delivered up to the end of the period

b) In the event of an order being cancelled by the Purchaser for any other reason, the Purchaser shall be liable to indemnify the Seller against all losses (including loss of profit) costs and other expenses and damages (whether direct or consequential) occasioned by such cancellation.

1.7 Use and Control of Data and Hardware



Roadbridge Ireland Ballysimon Road Limerick ireland

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INVOICE Our Order Reference: IN-002 Your Reference:

> Aquaread Limited Bridge House Northdown Industrial Park Broadstairs, Kent CT10 3JP ENGLAND Tel:+44 1843 600 030 Email: orders@aguaread.com

CONTACT NAME: Keith O'Flynn EMAIL / PHONE NUMBER : keith.oflynn@roadbridge.ie \ +353 (0) 61 414 874

Date
27/09/2017

QUANTITY	PART NO.	DESCRIPTION	UNIT PRICE	NET VALUE
1	Delivery	Standard delivery charge.	£25.00	£25.00
1	AP-800 Package	GPS AQUAMETER, AQUAPROBE AP-800 supplied with DO, EC, pH, ORP, Temperature and Turbidity sensors, a 3m tough cable and various accessories supplied in a Hard Carry Case.	£1,900.00	£1,900.00
1	RC-600	500mL RapidCal Solution.	£20.00	£20.00
1	TURB-1000	1000NTU calibration solution 500ml.	£50.00	£50.00
1	1 ZO-150 150mL Zero Oxygen Solution.		£15.00	£15.00
				£2,010.00





INVOICE Our Order Reference: IN-002 Your Reference:



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Aquaread Limited Bridge House Northdown Industrial Park Broadstairs, Kent CT10 3JP ENGLAND Tel:+44 1843 600 030 Email: orders@aquaread.com

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### DELIVERY ADDRESS

Roadbridge Ireland Ballysimon Road Limerick Ireland

CONTACT NAME: Ryan Cox EMAIL / PHONE NUMBER : ryancox@aguread.com \ 024 7669 4664

> Our Order Reference: D-002 Your Reference: 1028

QUANTITY	PART NO.	SERIAL NUMBER
1	Delivery	101
1	AP-800 Package	102
1	RC-600	103
1	TURB-1000	104
1	ZO-150	105



### Order Template:



QUAREAD

Aguaread Limited **Bridge House** Northdown Industrial Park Broadstairs, Kent CT10 3JP ENGLAND Tel:+44 1843 600 030 Email: orders@aquaread.com

To: BroadstairsUnited KingdomCT10 3JPBridge House, Northdown Industrial Park

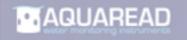


FAO: Sara Williams Tel: 9865723698 Fax: 12345 Email: sara34@tcs.com

Quote Validity: 30 days Issued By: Sara Williams

C096	DESCRIPTION	NET PRICE	DISCOUNT	UNITS	QUANTITY	TOTAL
AP-800 Package	GPS AQUAWETER, AQUAPROBE AP-800 supplied with DO, EC, pH, ORP, Temperature and Turbidity sensors, a 3m tough cable and various accessories supplied in a Hard Carry Case.	£1,140.00	3	223	12	£13,680.00
AP-LITE Package	GPS AQUAMETER, AQUAPROBE AP-LITE body featuring optical sensor socket and rugged AquaConn connector, a 3m tough cable with connectors at both end and various accessories all supplied in a Rugged Carry Case.	£1,140.00	3	23	12	£13,680.00
AquaPlus Package	AquaPlus OPS Meter, AquaPlus Probe shipped with sensor cap, a 3 meter cable and various accessories all supplied in a Hard Carry Case.	6699.33	1	33	34	£23,777.22
AP-2000 Package	OPS AQUAMETER, AQUAPROBE AP-2000 supplied with Optical DO, EC, pH, ORP and Temperature sensors, a 3m tough cable with connectors at both ends and various accessories all supplied in a Rugged Carry Case.	£10.00	1	34	3	£30.00
AP-2000- D Package	GPS AQUAMETER, AQUAPROBE AP-2000-D supplied with Optical DO, EC, pH, ORP, Temperature and Depth sensors, a 3m tough cable with connectors at both ends and various accessories all supplied in a Rugged Carry Case.	£20.00	1	44	3	£60.00
Other Information					Items Total:	£51,227.22

QUOTATION Quote Ref: 156 Issue Date: 08/09/2017 Prices in GEP



VAT: £10,245.44 Oross: 661,472.66

Billing Address:

BroadstairsUnited KingdomCT10 3JPBridge House, Northdown Industrial Park

Deliver To: BroadstairsUnited KingdomCT10 3JPBridge House, Northdown Industrial Park

Terms of Payment: PREPAYMENT All orders are subject to our terms and conditions below. E&OE.

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Account Name: Aguaread Limited Bank Name: National Westminster Bank PLC Sort Code: 52-10-19 Account No.: 10617965 IBAN: GB67 NWBK 5210 1910 6179 65 BIC: NWBKGB2L

Company Registration No. 06734328 VAT No. 942 9884 70

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1.2 Acceptance of Order

- a) Each order received and accepted by the Seller will be deemed to form a separate contract to which these conditions of sale shall apply and any waiver or any act of non-enforcement or variation of any terms or part thereof on the part of the Seller shall not bind or prejudice the Seller in relation to the application of these conditions to any other order, instalment or delivery whenever arising.
- b) The Seller reserves the right (without prejudice to any other remedy) to cancel any uncompleted order or to suspend delivery in the event of any of the Purchaser's commitment with the Seller





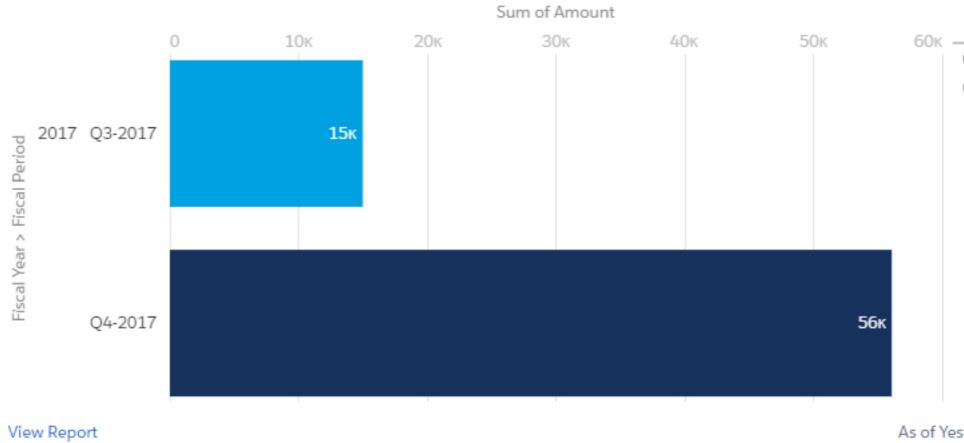


## ✓ We used MailChimp to create lead in salesforce.



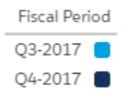
## ✓ We have created reports and dashboard to track sales.

### Sales Month To Date Report





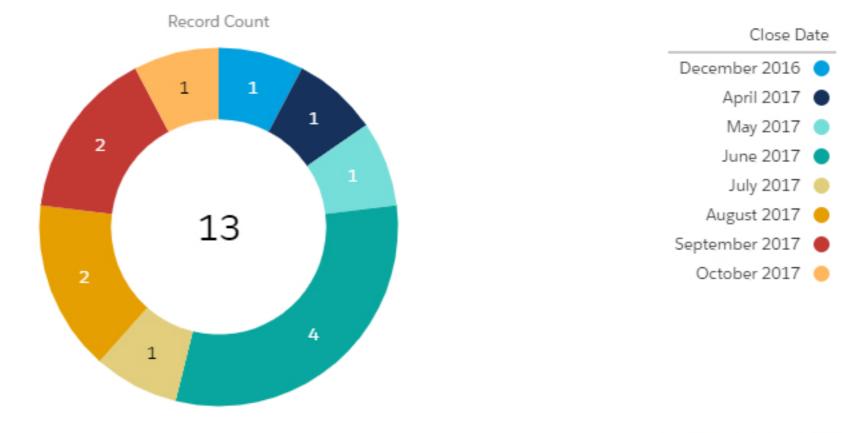




### As of Yesterday at 13:43

## Total Sales FY Dashboard:

**Total Sales FY** 



View Report

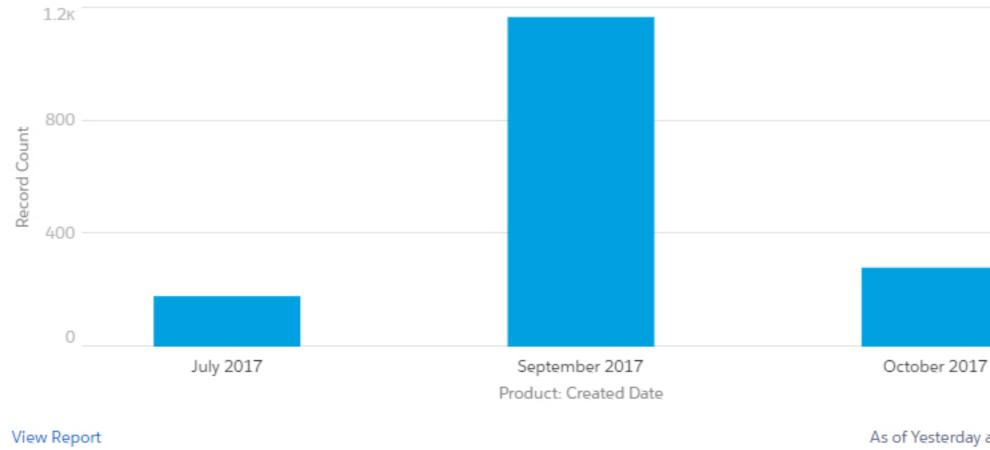




As of Yesterday at 13:43

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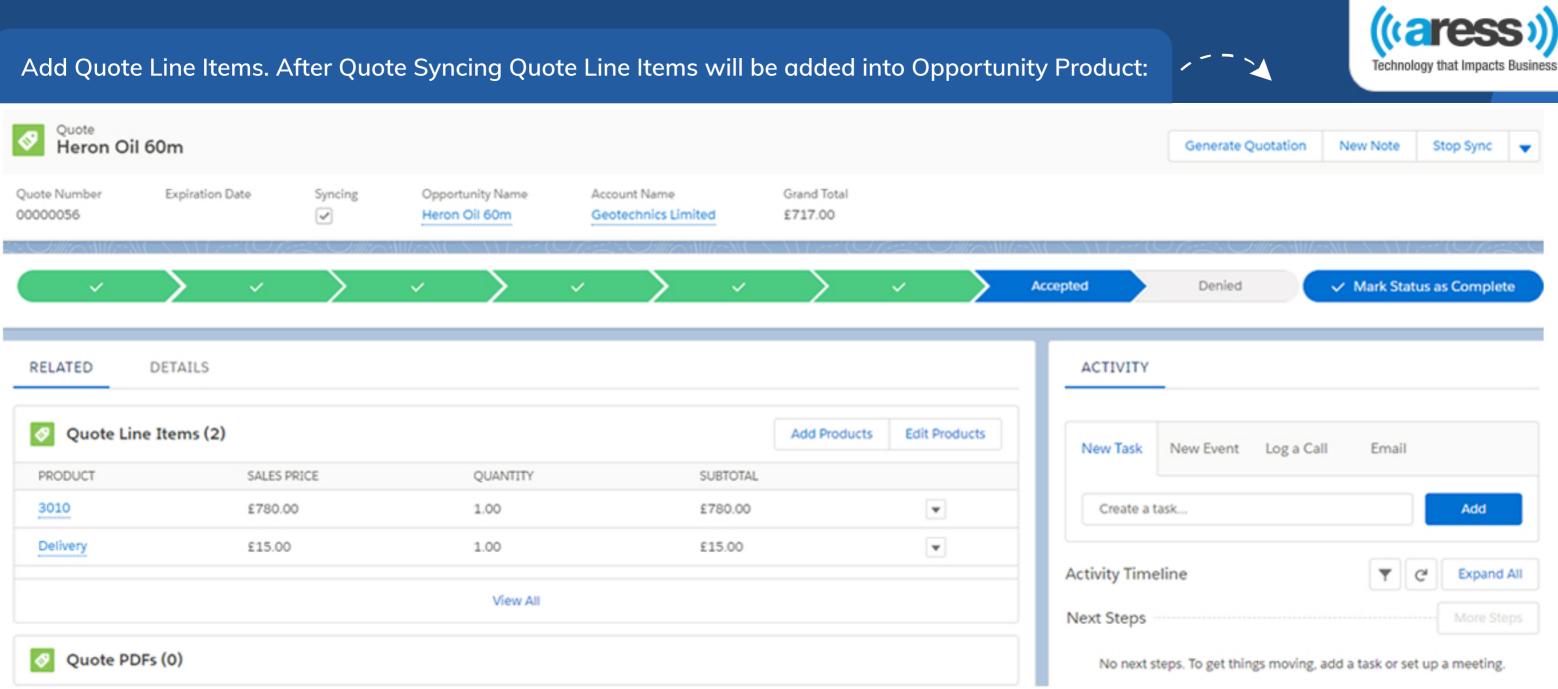
### **Product Sales By Date**



Automated the process of creating line items which will added into Invoice and delivery notes to generate pdf.



As of Yesterday at 13:43 C







When Opportunity status change into Closed Won then Invoice and Delivery Header will created with line Items:

Invoice IN-010				
RELATED DETAILS				
🕍 Invoice Line Items (	2)		New	
INVOICE LINE ITEM NAME	QUANTITY	UNIT PRICE	DESCRIPTION	
3010	1	£780.00	H.0IL x 60m H.0IL x 15m H.0IL	
Delivery	1	£15.00	Standard delivery charge.	
		View All		
🕒 Notes & Attachment	ts (0)		Upload Files	
		1 Upload Files		
		Or drop files		
1				-1



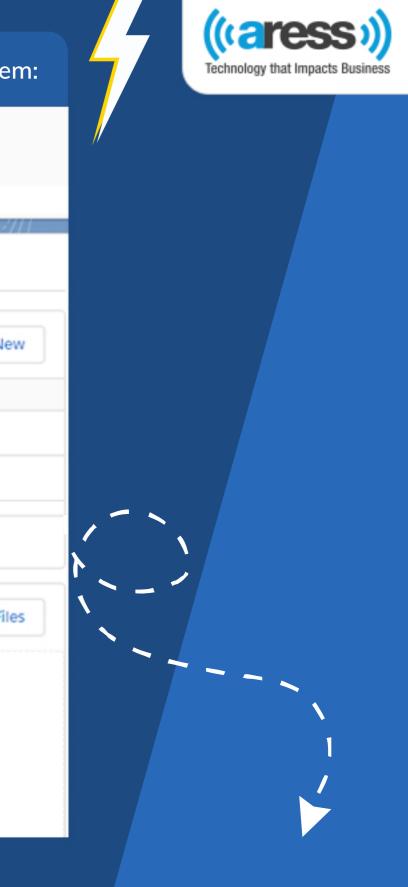
Delivery Notes D-010					Technology that Impacts Business
RELATED DETAILS	)(∂				7
Delivery Notes Line Item (2)				New	
DELIVERY NOTES LINE ITEM NAME	QUANTITY		SERIAL NUMBER		
3010	1			-	
Delivery	1			v	
		View All			
Notes & Attachments (0)				Upload Files	
		1 Upload Files			
		Or drop files			
ascript:void(0);					



Automatica	lly added Quote I	Line Items into Oi	rder Products whe	n opportunity	status will be	e closed won:	((Caress)) Technology that Impacts Business
Order 00000105						Generate Order New	v Note New Contact 👻
Account Name Geotechnics Limited	Contract Number		atus Order Amount raft £795.00				
	Draft	Activated		Closed Won		Closed Lost	Mark Status as Complete
RELATED DE	TAILS					ACTIVITY	
S Order Produc	cts (2)			Add Products	Edit Products	New Task New Event Log a Call	Email
PRODUCT	PRODUCT CODE	QUANTITY	UNIT F				
3010		1.00	£780.	00	¥	Create a task	Add
Delivery		1.00	£15.0	0	T		
		View Al				Activity Timeline Next Steps	C Expand All More Steps
invoice (0)					New	No next steps. To get things moving, add Past Activity	a task or set up a meeting.
Delivery Note	es <mark>(</mark> 0)				New	No past activity. Past meetings and tasks m	arked as done show up here.

## Create Invoice and Delivery header and add Order Products into Invoice Line Item and Delivery Line Item:

Invoice IN-011				
RELATED DETAILS				<u>\</u> //
🕍 Invoice Line Items (	(2)			Net
INVOICE LINE ITEM NAME	QUANTITY	UNIT PRICE	DESCRIPTION	
3010	1	£780.00	H.0IL x 60m H.0IL x 15m H.0IL .	
Delivery	1	£15.00	Standard delivery charge.	T
		View All		
Notes & Attachmen	ts (0)			Upload File
		1 Upload Files		
		Or drop files		



Delivery Notes D-011				Technology that Im
RELATED DETAILS				
Delivery Notes Line Item (2)			New	
DELIVERY NOTES LINE ITEM NAME	QUANTITY	SERIAL NUN	IBER	
3010 Delivery	1		•	
		View All		
<b>Notes &amp; Attachments (0)</b>			Upload Files	
		Or drop files		

