

Customize Invoice Generation Application in Salesforce

**Cloud - Sales Cloud
Industry - Restoration Industry**

Case Study

Created by - TGWS

1. Background

A mid-sized manufacturing company was using Salesforce Sales Cloud to manage their sales and customer data. However, their process for generating invoices was manual, inefficient, and prone to errors. Sales representatives would manually create invoices using third-party tools, then upload them to Salesforce, which was time-consuming and lacked consistency.

To streamline this process, the company sought a solution within Salesforce to create invoices dynamically.

They required a robust tool that allowed users to:

- Select an existing invoice template or create a custom invoice.
- Save the generated invoice automatically as an attachment in Salesforce.
- Email the invoice to clients directly from Salesforce.

2. Challenges

- **Lack of Centralized Invoice Creation:** The absence of a unified tool meant invoices were scattered across multiple platforms, leading to inefficiencies.
- **Customization Needs:** Clients often requested invoices with specific formatting or additional details, which required a flexible system.
- **Attachment and Storage:** Ensuring that all invoices were stored as attachments for compliance and easy access was essential.
- **Integration with Email:** Seamless integration with Salesforce's email functionality was needed for efficient communication.
- **User Experience:** Sales reps with limited technical knowledge needed a user-friendly interface.

3. Solutions:

We developed a custom Invoice Creation module within Salesforce Sales Cloud using Lightning Web Components (LWC) and Visualforce, with the following features:

Dynamic Invoice Creation Interface (LWC):

- A Lightning Web Component was designed to allow users to either:
- Select a predefined invoice template.
- Create a custom invoice by adding/removing fields dynamically.
- The LWC provided a real-time preview of the invoice before saving.

Data Integration and Validation:

- Pre-filled customer data such as name, address, and products were fetched automatically from Salesforce records using SOQL queries.
- Validation logic ensured required fields were completed before proceeding.

Visualforce Integration for PDF Generation:

- A Visualforce page was used to generate invoices in PDF format for consistent formatting.
- Once generated, the PDF was automatically saved as an attachment to the associated Salesforce record.

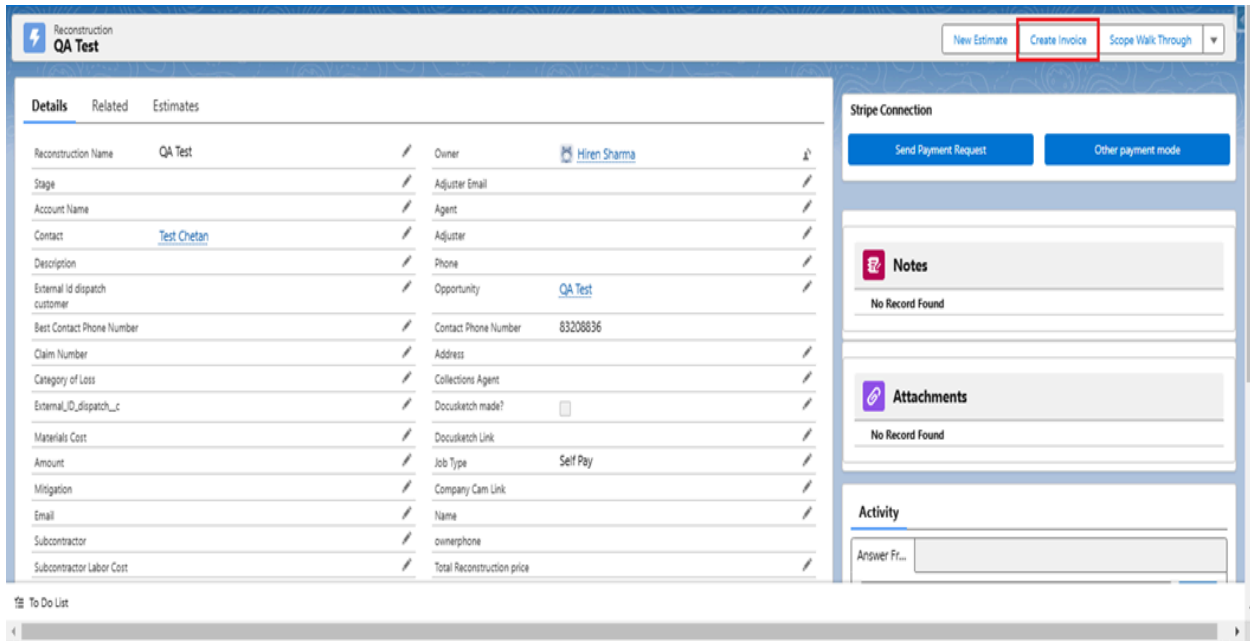
Email Functionality:

- A "Send Invoice" button integrated into the LWC allowed users to email the generated invoice directly from Salesforce.
- The email feature leveraged Salesforce's standard email service, with the invoice attached as a PDF.

Automation for Attachment Storage:

Apex triggers ensured that every generated invoice was stored automatically as an attachment under the relevant Opportunity or Account record.

4. Implementation Screenshots:



Reconstruction
QA Test

New Estimate **Create Invoice** Scope Walk Through

Details Related Estimates

Reconstruction Name	QA Test	Owner	Hiren Sharma
Stage		Adjuster Email	
Account Name		Agent	
Contact	Test Chetan	Adjuster	
Description		Phone	
External Id dispatch customer		Opportunity	QA Test
Best Contact Phone Number		Contact Phone Number	83208836
Claim Number		Address	
Category of Loss		Collections Agent	
External_ID_dispatch_c		DocuSketch made?	☐
Materials Cost		DocuSketch Link	
Amount		Job Type	Self Pay
Mitigation		Company Cam Link	
Email		Name	
Subcontractor		ownerphone	
Subcontractor Labor Cost		Total Reconstruction price	

Stripe Connection

Send Payment Request Other payment mode

Notes

No Record Found

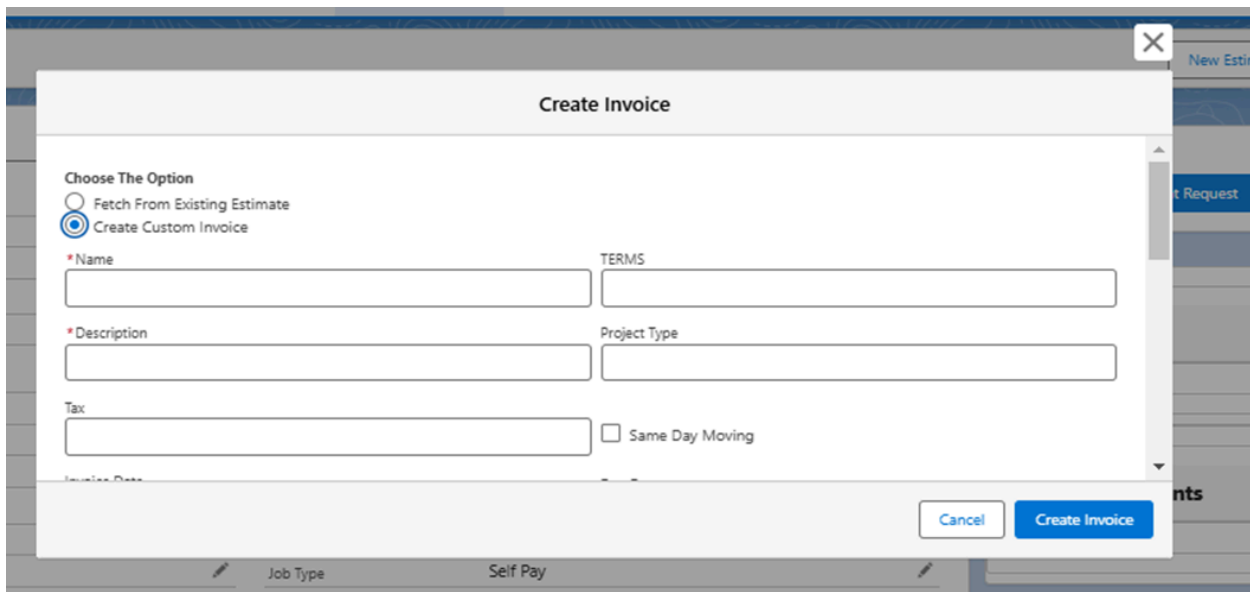
Attachments

No Record Found

Activity

Answer Fr...

To Do List



Create Invoice

Choose The Option

☐ Fetch From Existing Estimate

☒ Create Custom Invoice

* Name

TERMS

* Description

Project Type

Tax

☐ Same Day Moving

Cancel Create Invoice

Create Invoice

Choose The Option

☒ Fetch From Existing Estimate

☐ Create Custom Invoice

Choose The Estimate

- ☐ Test Estimate (Monday, Jan 22, 24, 9:45 PM)
- ☐ Opportuniny QA Test (Wednesday, Jun 19, 24, 12:05 AM)
- ☐ Opportuniny QA Test (Friday, Jun 21, 24, 6:11 AM)
- ☐ Opportuniny QA Test (Friday, Jul 19, 24, 4:58 AM)
- ☐ Opportuniny QA Test (Tuesday, Jul 30, 24, 4:09 AM)
- ☐ test (Tuesday, Sep 03, 24, 6:10 AM)
- ☐ Created From Opportunity (Tuesday, Sep 03, 24, 9:50 AM)
- ☐ Opportuniny QA Test (Friday, Sep 06, 24, 6:41 AM)
- ☐ vvvvvh (Sunday, Sep 22, 24, 11:49 PM)

[Cancel](#) [Create Invoice](#)

Invoice Test Estimate- Reconstruction

[+ Follow](#) [Edit Invoice](#) [Send Email](#) [Sync Invoice With Quickbook](#)

Invoice Created Payment Request Sent Paid Unpaid Overdue [Mark Stage as Complete](#)

Related Details

Invoice Details

Invoice Name	Test Estimate- Reconstruction	Work Order	
Invoice Number	inv-2588	Description	
Service Name		Invoice Date	11/19/2024
Project Type	Reconstruction	Due Date	
Stage	Invoice Created	ExpirationDate	
Status		TERMS	
IsSyncing	☐	Phone	
Same Day Moving	☐	Email	
Activity		Contact	
Fax			

Payment Details

Stripe Connection

[Send Payment Request](#) [Other payment mode](#)

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[To Do List](#)

PAGES

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- ☐ Inspection
- ☒ Quote Details
- ☐ HVAC Duct Mold
- ☐ Hearth
- ☐ Consumer Mold Information Sheet
- ☐ Terms and Conditions
- ☐ 11-21-22_GLCertificate
- ☐ Warranty

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Quote Details Page

Quote Details 1

Select Macros

Section title [Down](#) [Up](#)

Test 2003

Item	Measure Unit	Quantity	Price	Tax	Line total
Q. Test Account 2	EA	1	1000	4	1040
Q. Test Product 2	EA	1	1000	3	1030
Q. Dryer - Electric	EA	11	200		2200
Q. Aisle - drag (with springs) - no brakes	EA	1	11,111		11,111
Q. Anchor - two crossed rods driven into the ground	EA	1	100		100
Q. Anchor - twist in ground type	EA	1020	10		10200

[Previous](#) [Preview PDF](#) [Finalize estimate](#) [Send Email](#) [Save](#)

QDR Invoice (2024-11-18 00:00:00).pdf

Download Share Public Link

Sales Home Accounts Contacts Leads

Test Estimate- Reconstruction

Approval History (0)

Charge Transactions (0)

Charge Payment Requests (0)

Notes & Attachments (1)

QDR Invoice (2024-11-18 00:00:00).pdf
Nov 18, 2024 • 5768 • pdf

Charge Orders (0)

InvoiceLineItems (0)

InvoiceLineItem Name

LI-7372

LI-7373

LI-7374

LI-7375

LI-7376

To Do List

Quick Dry Restoration
1019 S. Heatherwilde Blvd Suite 120
Pflugerville, TX 78660
info@quickydryrestoration.com
https://quickydryrestoration.com

INVOICE
Bill to Address
312 Sutter Street
San Francisco, CA 94108

PROJECT TYPE
Reconstruction

DESCRIPTION	AMOUNT
Reconstruction	\$3,966.87

TAX (8.25%)
TAX AMOUNT 327.27

GRAND TOTAL
TOTAL PAID AMOUNT \$0.00
BALANCE DUE \$4,294.14
LAST PAYMENT MADE \$0.00
LAST PAYMENT DATE

Page 1 of 1

Reports Forecasts Estimates Invoices More

Cancel Edit Invoice Send Email Sync Invoice With QuickBooks

Send Payment Request Other payment mode

Event Activity Search this feed

Collaborate here!

Search...

To

Cc

Subject...

Salesforce Sans 12 B I U

Dear Test Estimate- Reconstruction,

Thank you for using Quick Dry for your restoration. We appreciate your business!

We have attached your Invoice to this email. The total amount is **\$4294.14** and is due upon receipt.

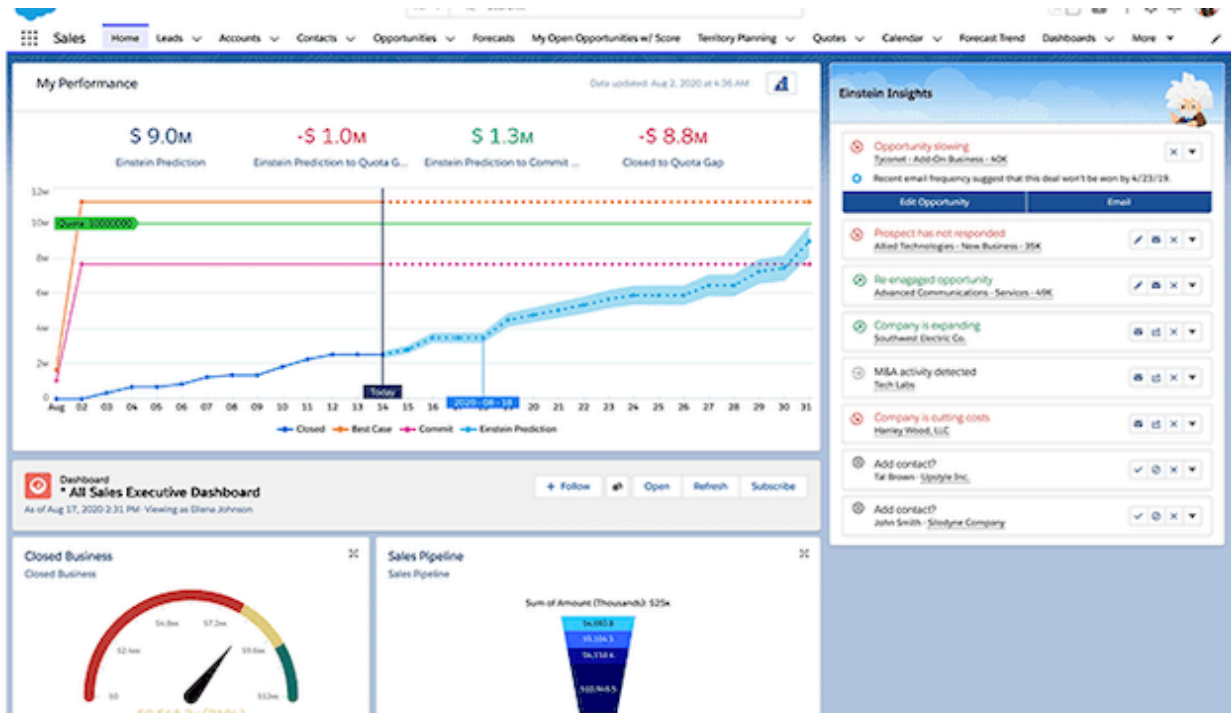
Kindly click this link to make a payment: [Payment Link](#)

Or if you are paying with a check, please send payment to:

Quick Dry Restoration
1019 S. Heatherwilde Blvd
Suite 120
Pflugerville, TX 78660

[View Attachment](#)

Cancel Reset Send



5. Result:

- **Time Efficiency:** Sales reps reported a 50% reduction in the time required to generate and send invoices.
- **Improved Accuracy:** Automated data fetching and validation eliminated manual errors.
- **Enhanced User Experience:** The intuitive LWC interface increased adoption among users with minimal training.
- **Centralized Invoice Management:** All invoices were securely stored in Salesforce, ensuring easy access and compliance.
- **Customer Satisfaction:** Clients appreciate the prompt and professional invoices, leading to improved relationships.

6. Conclusion:

The custom Invoice Creation module revolutionized the way the manufacturing company managed invoices in Salesforce. By leveraging the combined power of LWC for dynamic interfaces and Visualforce for PDF generation, the solution provided a seamless and efficient experience. This implementation highlights how Salesforce customization can address unique business needs while driving productivity and customer satisfaction.

The client now has a scalable and reliable solution, setting the foundation for future enhancements such as integrating payment gateways or analytics for invoice tracking.