

Enlighten

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ABOUT THE CLIENT

Enlighten is an Australian-based innovation company that provides energy saving solutions by designing and supplying LED lighting solutions & smart controls, focused on providing light only to space when occupied, saving energy up to 93%. The CEO of Enlighten, Steve Cahill approached us with an idea to develop a quote and reporting system that will significantly ease the work of the sales team by improving the process of issuing quotes and reports. Clavax and its development team have built a flexible, scalable and efficient system fulfilling the business needs with easy data entry and report generating mechanism.

MEETING GOALS & CHALLENGES

The main motive behind the project is to recreate and convert the MS Excel quoting system (previously used by the client's sales team) to a web-based application that will enhance the process and speed of creating quotes and reports to their clients. The system developed by Clavax connects to inventory in Salesforce and form the base to easily iterate, add or change its business operation procedure easily.

Here are some of the main challenges faced by the Client & the development team—

Complex System

Previously, the client was using a complex macro-based spreadsheet where the staff needs to enter data collected at the site to generate quotes and reports. As it involves enormous calculation with internal data present in the existing system, it took lots of time and efforts.

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✔ Multiple Sheets Generation

As the staff enters the data manually into the excel spreadsheet for generating quotes, it leads to multiple sheets in different folders with no or little governance leading to more confusion. It was a difficult task to synchronize the data since there were many lists of existing and new lights price, voltage, usage, etc.

✔ Integrating Existing data to New system

With too many excel sheets present, the business did not have a clear view of the process and there was a disconnect between the salesforce data and current client database. Importing all the data from the existing system to a new one was not an easy job.

● SOLUTIONS

To understand the client's needs thoroughly, the development team went through several interactive discussions. Here are some of the main solutions that were successfully implemented to address the challenges and has made the project a successful one.

✔ Light Products Fetching

The system designed by Clavax has helped in easily fetching of light products from Salesforce ERP through API for inclusion in quotes generation.

✔ Daily Data Synchronization

The system developed ensures that all the data from Salesforce connected app are synchronized daily to prevent data conflicts, errors & establish consistency in quotes & reports calculation.

✔ Quote Generation Workflow

After validating the data entered in all forms as per business rule, the quote is generated after fetching the workflow details from the web forms submitted and comparing them with the salesforce product information table.

✔ Report Generation Workflow

Using the system, the sales team generate reports containing a mixture of data from the database in tabular/graphical formats, pictures, marketing material and third-party forms like quotations.



✔ Easy Calculation Form

The light calculation form helps in calculating the total cost, as the team only needs to enter the necessary details of the light fixture to be installed along with energy consumption for current fixtures & proposed fixtures.

✔ Manual to Auto-Calculation

An automated web-based system was built with a better reporting mechanism that has enhanced the speed of generating quotations and reports for prospective clients after a site survey. All the complex calculation are automated reducing the chance of error.

● TECHNOLOGY USED

The tools & technologies that were used by Clavax for the development of the system are:

- APIs: Python
- Scripting Languages: HTML5, CSS, JavaScript
- Programming Lang: Python
- Framework: Flask and Tornado
- Database: MongoDB
- Cloud Server: Azure
- Mail Server: Sendgrid
- Project Managment: JIRA and Confluence
- Version Control : VSTS/GitLab

● RESULTS

Ever since the launch of this web app for an efficient quoting system, the business flow of enLighten has improved tremendously. This has not only eased the sales process but also enhanced the speed of generating quotes and reports saving the manual efforts and time. As the quote system is integral to the operations of enLighten, this web-based application plays a perfect role by helping in the conversion of leads to sales and long-term clients. With the quotations easily issued to customers based upon the cost-effective lighting solutions, the business of enLighten had a better view of the operation process, fulfilling the goals faster.