**Order Management App**

**Introduction:** Order Management App is a platform to track Orders, Invoice and delivery status for the customer orders

**Type of Users:**

1. Business Users
2. Sales Users
3. Support Team

**Use Cases:**

1. Support team should able to create the business users, sales users and assign the users to respective roles / Account teams
2. Business users will able to view the accounts and related Contacts, Orders and Invoices only and it should not allow to edit or delete the data in the system
3. Sales Users should manage 5 accounts and they should able to see the other Sales users managing accounts and its related data
4. Business users managing the 10 accounts and they shouldn’t see the accounts and related data of the other business users
5. Two Sales users will be reporting to each business users
6. No users will able to delete the any records expect Support team
7. Support team should able to see whole data under this app
8. Order Stage will be changed based on the invoice creation and delivery info
9. Order Stage should change programmatically only
10. Order Stages / Status
    1. Open
    2. In process
    3. Invoice Generated
    4. Payment Received
    5. Delivery in Plan
    6. Delivered
    7. Cancelled
11. Order Remarks filed is mandatary if the order stage is Cancelled else system should display the error message “Order Remarks filed is mandatary, Please enter the remarks”
12. Utilize only Standard Objects and Two Custom Objects
13. List of Standard Objects:
    1. Accounts
    2. Contacts
    3. Opportunity
    4. Order
    5. OrderProducts
    6. Product2
    7. Pricebook
    8. Pricebookentery
14. Use Standard fields and below custom fields
15. Custom Fields on the Account
    1. Email Opt Out : Check box (True by default)
    2. Account Type
       1. Sold To
       2. Ship To
16. Custom Fields on the Contact
    1. Email Opt Out : Check box (True by default)
    2. Contact Type
       1. Primary
       2. Secondary
17. Custom Field on Product2
    1. Stock Quantity
    2. Brand
18. Stock Quantity should be descried based on the order line item Quantity and it should not allow to create order for the product where the Stock Quantity is Zero
19. Each account can have associated Contact more than one
20. Email notification should be based on the “Email Opt Out” field on Account and Contact
21. Email notification should not send out to any contact of the account if the “Email Opt Out” field unchecked on Account
22. Email notification should not send out to particular contact of the account if the “Email Opt Out” field unchecked on Contact
23. Notifications on each stage of order:
    1. Email notifications on each stage to the contacts and Sales team
    2. In App notifications: Business users and Support team

**Custom Objects:**

1. Invoice:
   1. Invoice Number
   2. Invoice Date
   3. Invoice Quantity
   4. Invoice Payment Received
   5. Order Reference
   6. Account Reference
   7. Invoice Currency
   8. Open Amount
   9. Payment Due Date
   10. Price Discount
   11. Transactional Net Value
   12. Net Invoice Value
2. Product Invoice:
   1. Invoice Number
   2. Invoice Quantity
   3. Net Invoice Value
   4. Transaction Currency
   5. Transactional Net Value
   6. Order line Invoice Number
   7. Price Discount
   8. Product
   9. Product Code
   10. Unit Price

**Reports/ Dashboard:**

1. Sales reports compares with Current year vs Pervious year
2. Top 10 Brand products sales report
3. Order vs Invoice reports
4. Dashboard to show visual representation of above reports
5. Above Dashboard should display the data of the accounts which logged in business user / Sales user managed and Support user should able to view whole data of the All business / Sales users

**ERD:**

