



# ORDER MANAGEMENT SYSTEM

## **PREPARED FOR**

SFDC Training Program

Capgemini Technology Services

## **PREPARED BY**

Kalash Rastogi

## Abstract:

The Order Management System is a salesforce-based solution that automates the order creation process. This application is designed mainly for Sales users and Business users both have their appropriate object permission and data accessibilities. Sales users can create, edit, confirm, or cancel the orders whereas Business users can only view or approve high valued orders. Order related invoices are also generated automatically when an order gets confirmed. This solution also notifies the order stage changes to the contacts related to that order via email.

## Scopes:

### In scope:

There are three types of users for whom this application is designed:

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

Each of these uses have different set of permissions and functionalities as:

1. The Sales User can:
  - a) Manage up to 5 accounts.
  - b) Not able to accounts managed by other sales users.
  - c) Create, edit, view and delete orders.
  - d) Submit for approvals.
  - e) Cancel orders.
  - f) Create invoices.
  - g) View reports and dashboards.
2. The Business User can:
  - a) View Orders.
  - b) Approve or reject high valued orders.
  - c) View reports and dashboards.
3. The Support team can:
  - a) Create Business and Sales users.
  - b) View all the data.

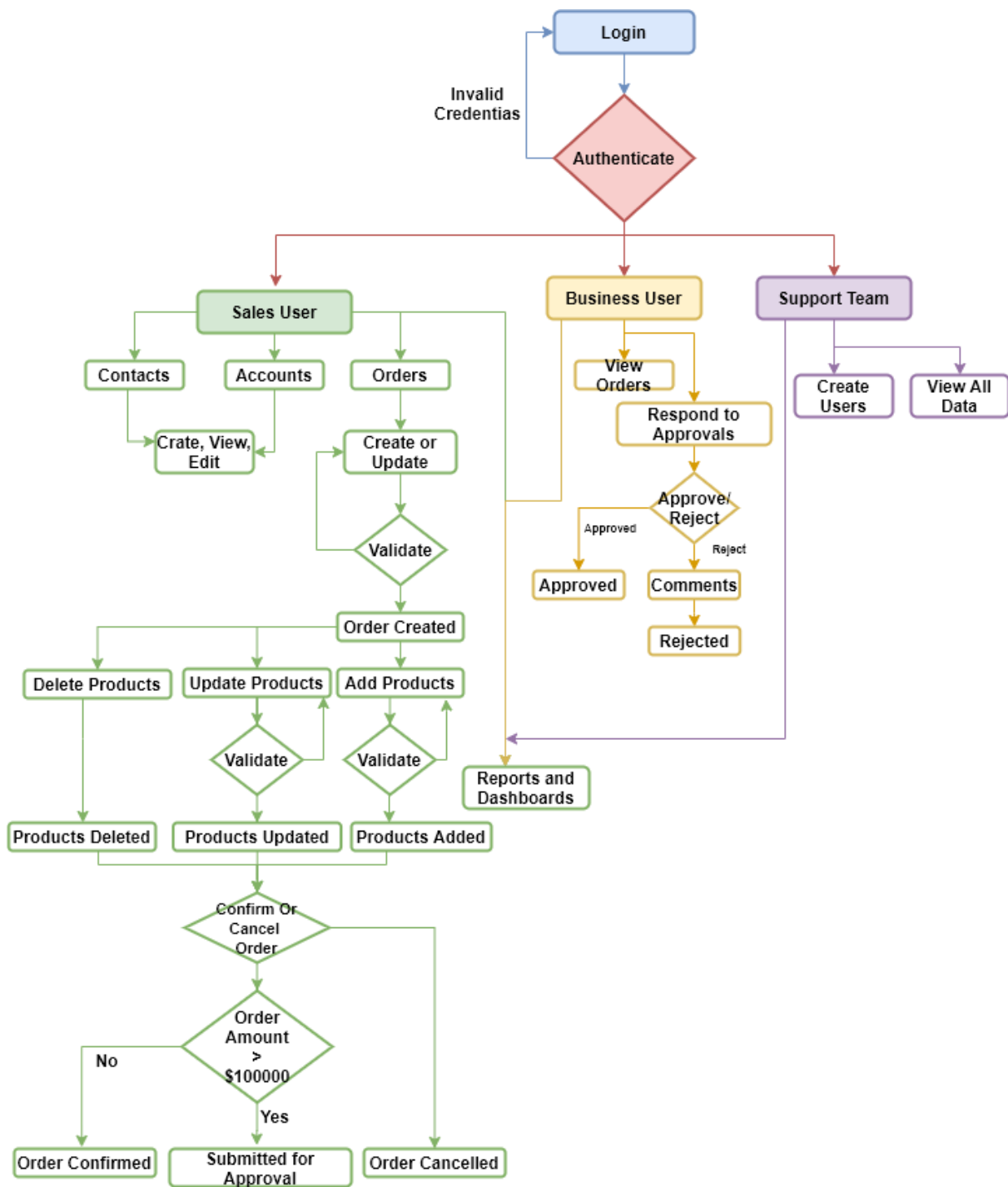
### Assumptions:

1. System Admin is assumed as business user due to restriction on salesforce user license in developer org.

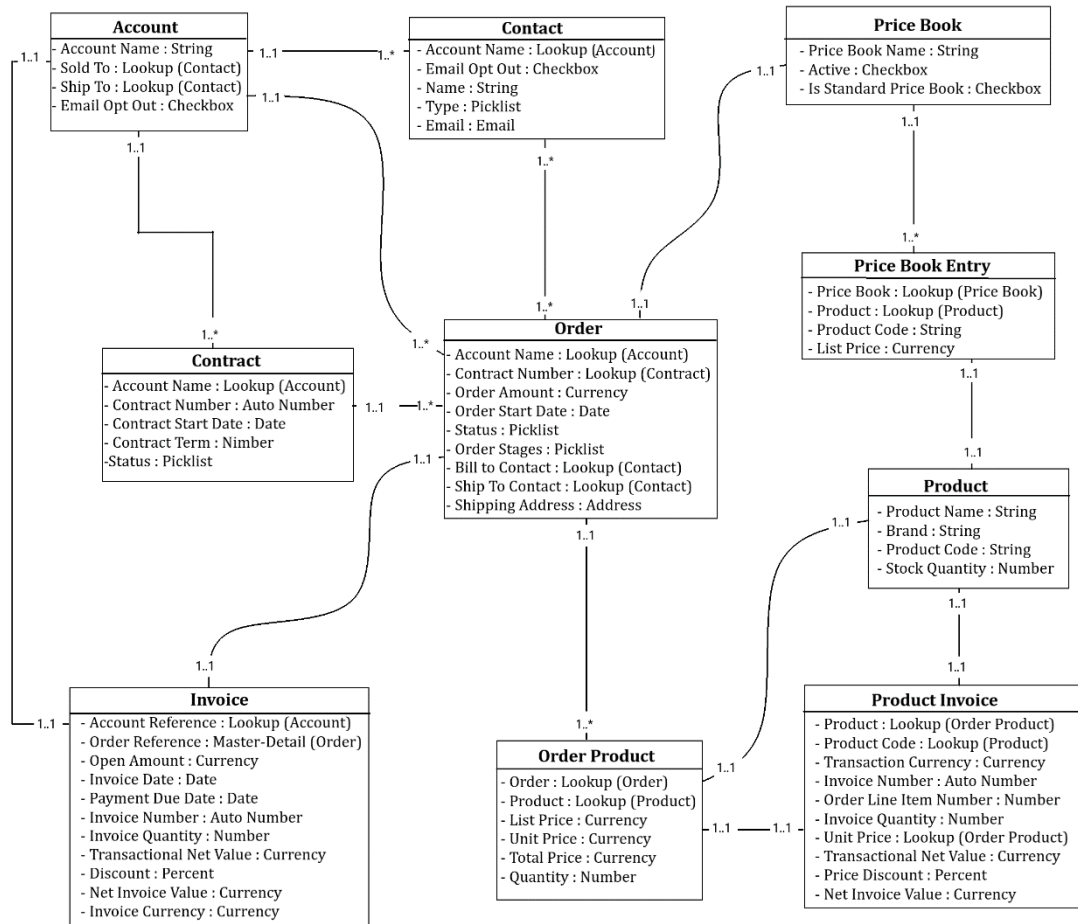
### Out scope:

1. Delivery process is not implemented

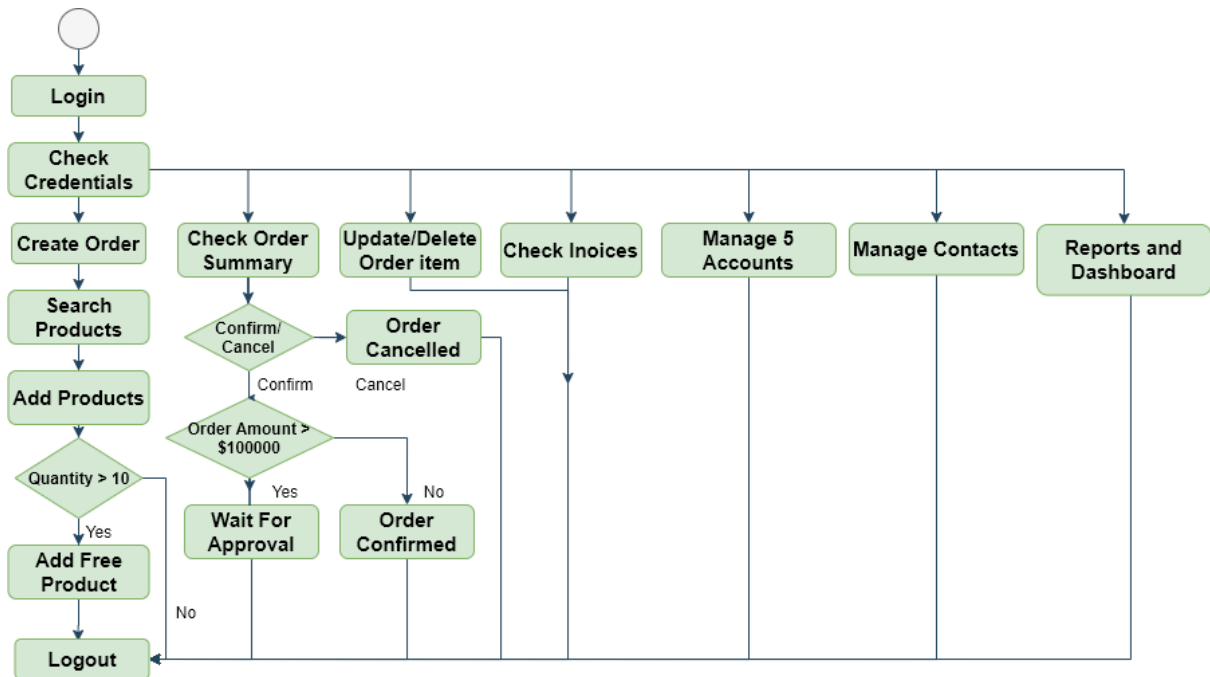
## Flowchart of this Application:



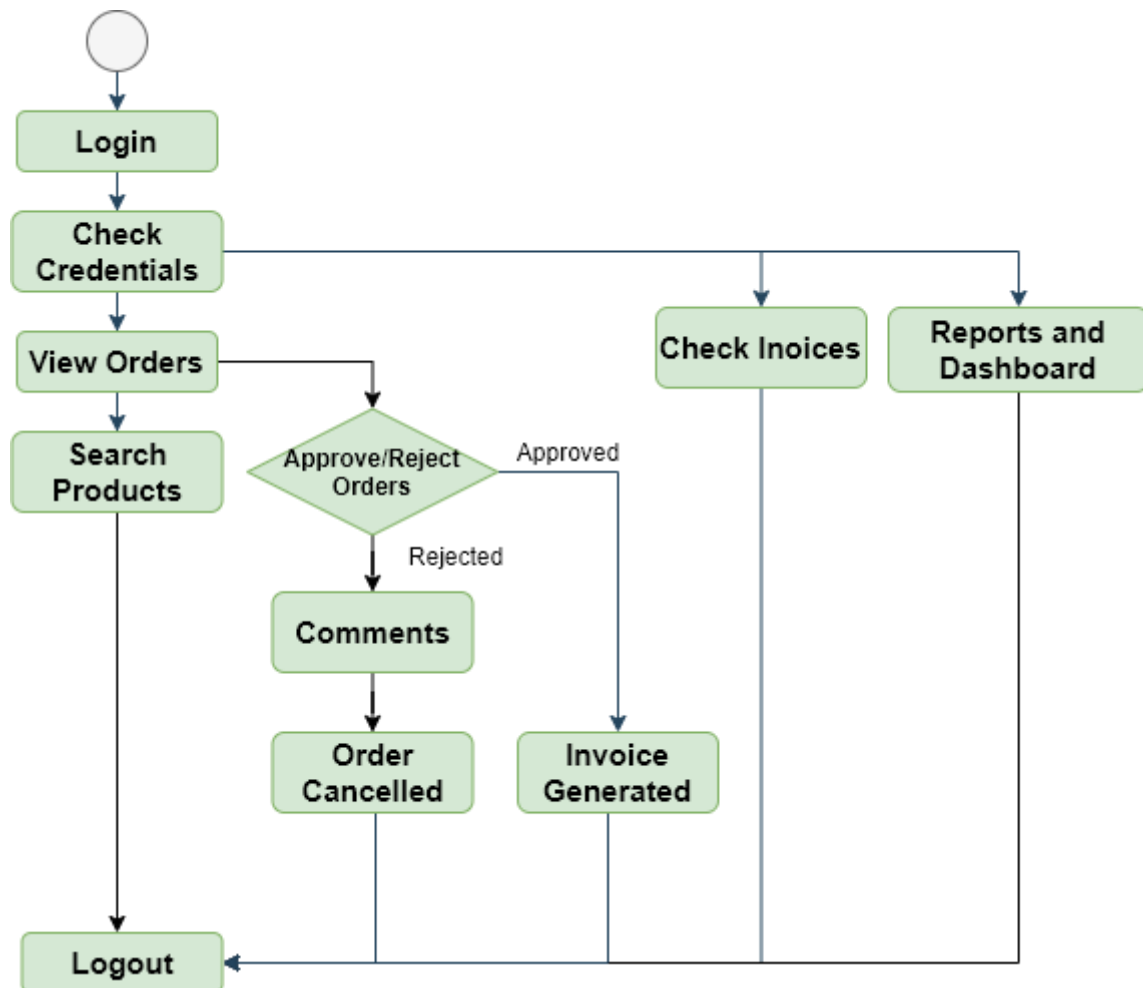
## Class Diagram of this Application:



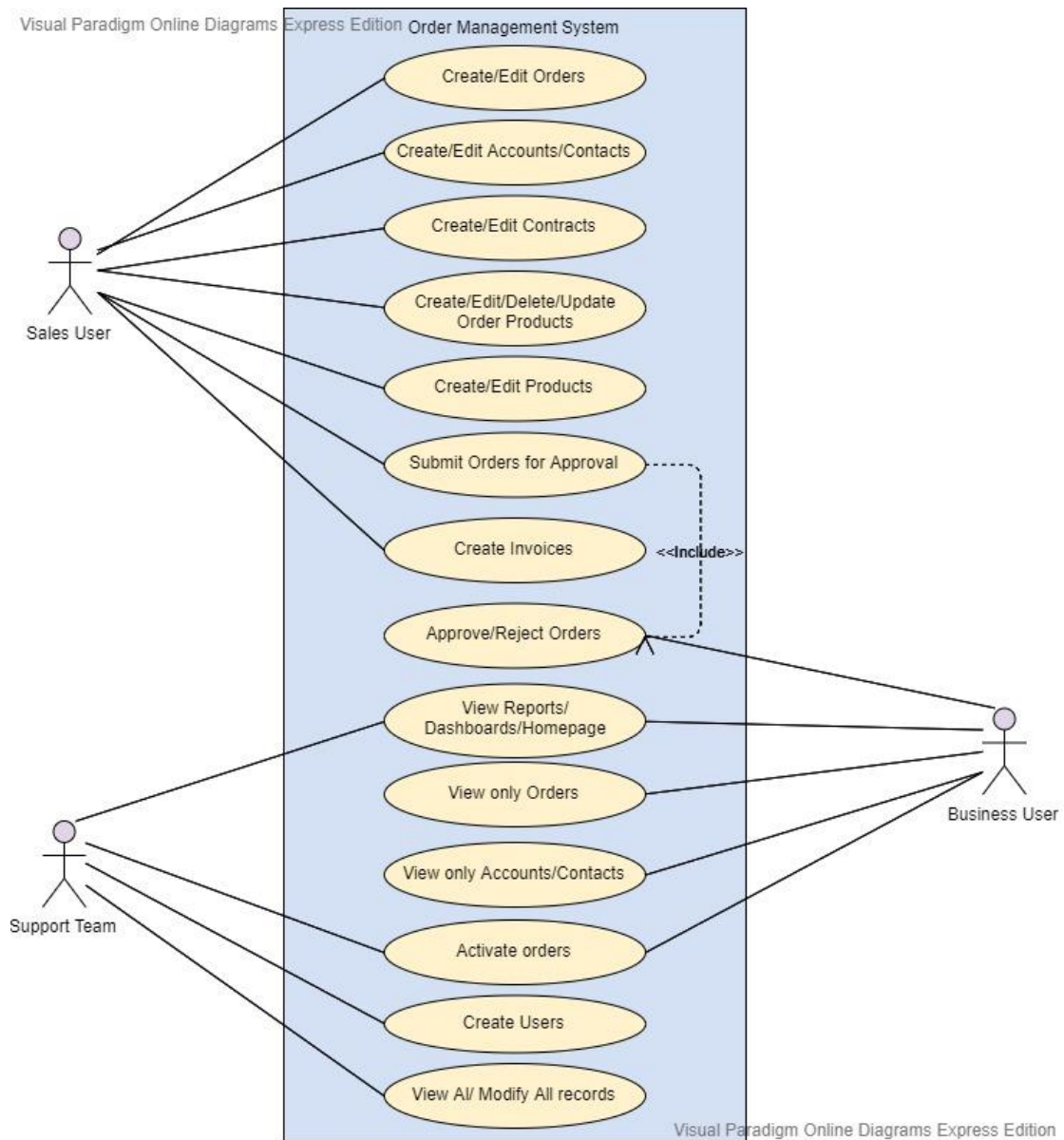
## Activity Diagram of Sales User:



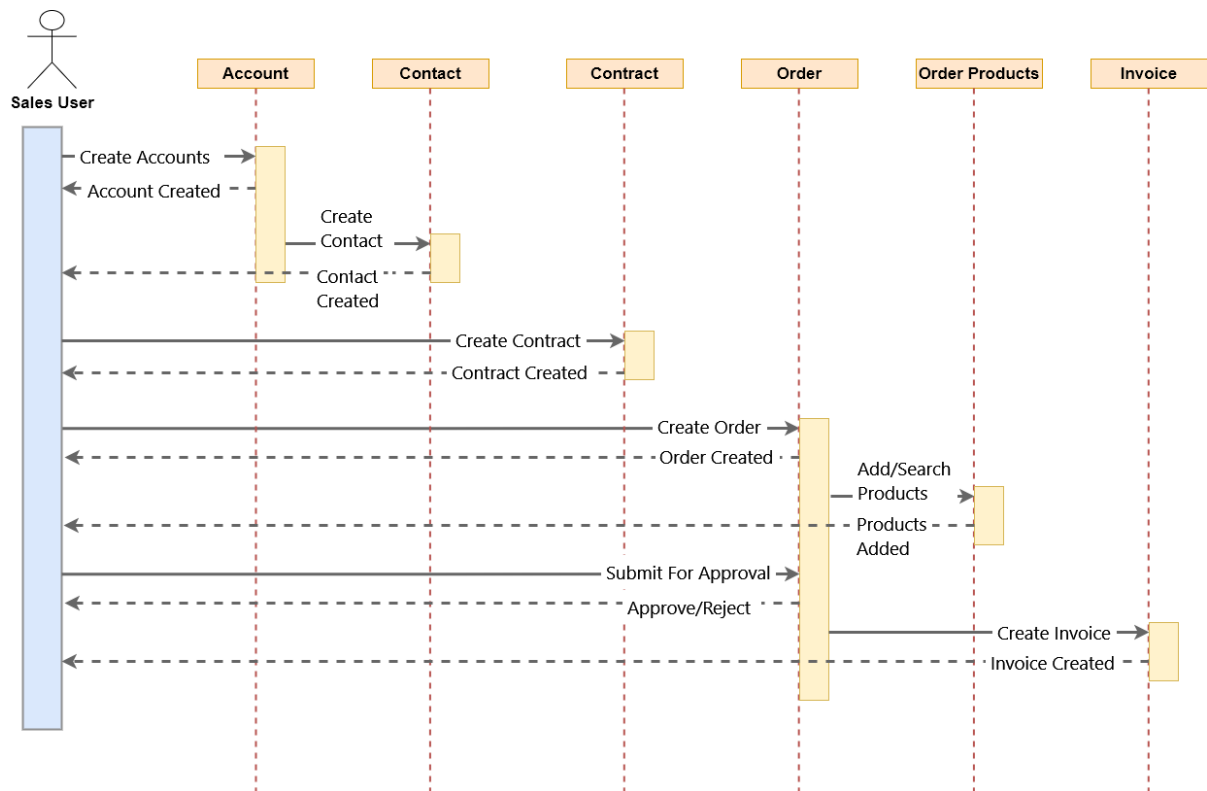
### Activity Diagram of Business User:



## Use case Diagram:

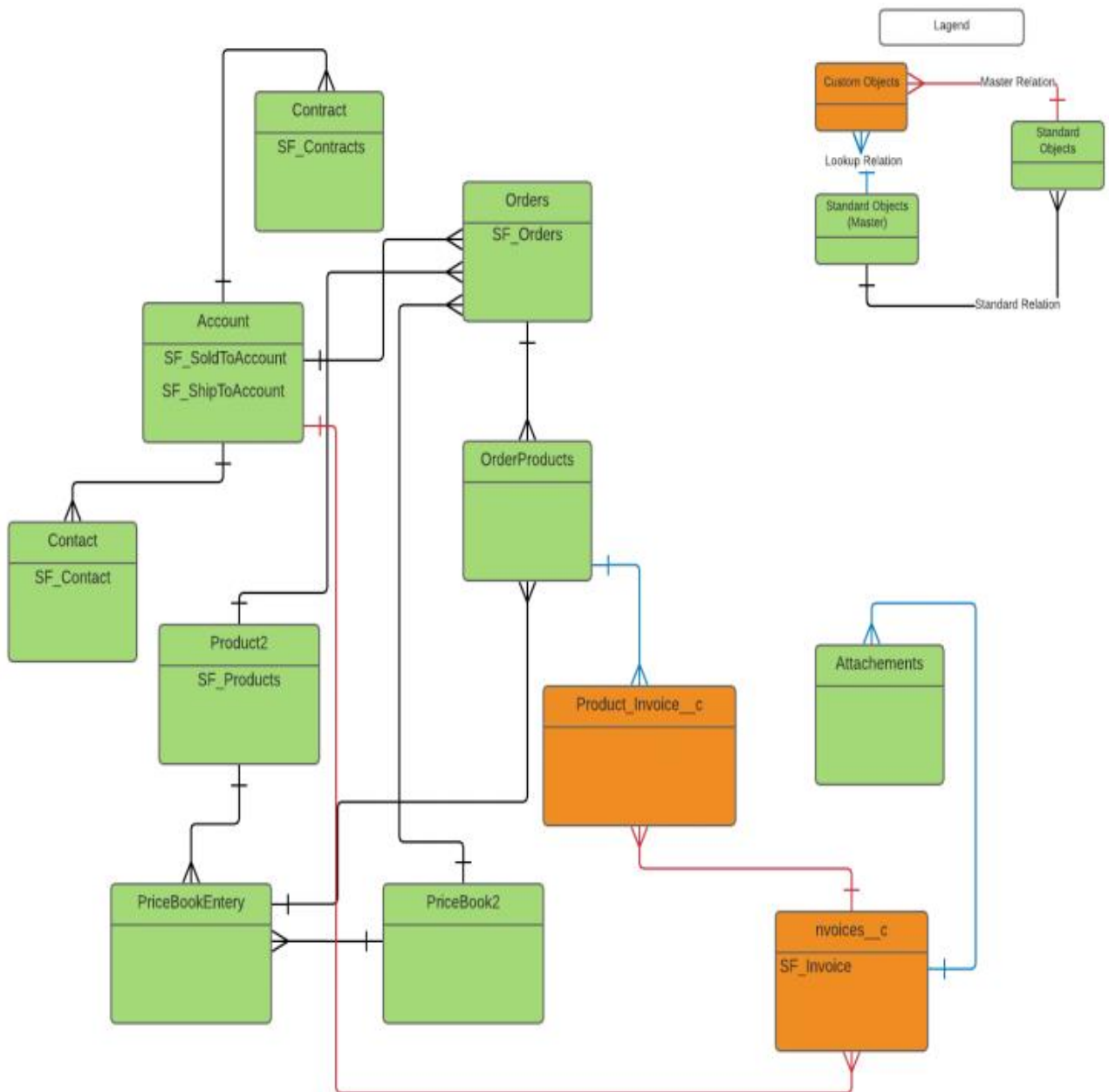


## Sequence Diagram:



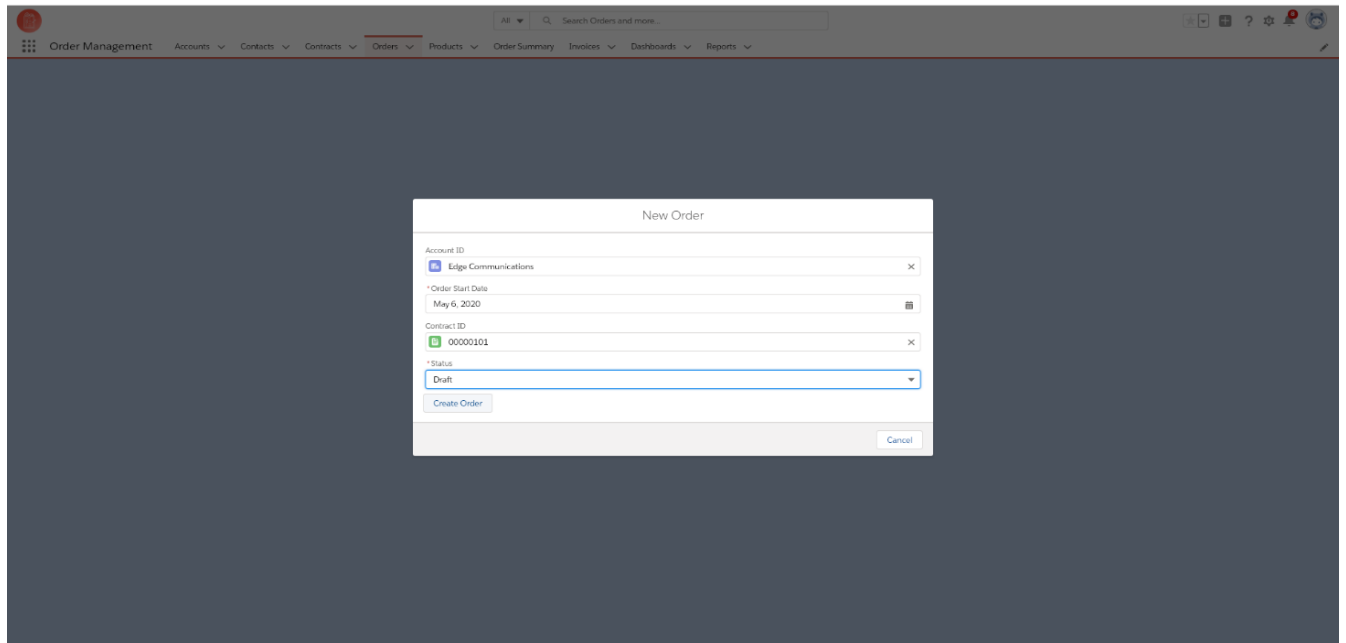


## ER Diagram:



# Wireframes

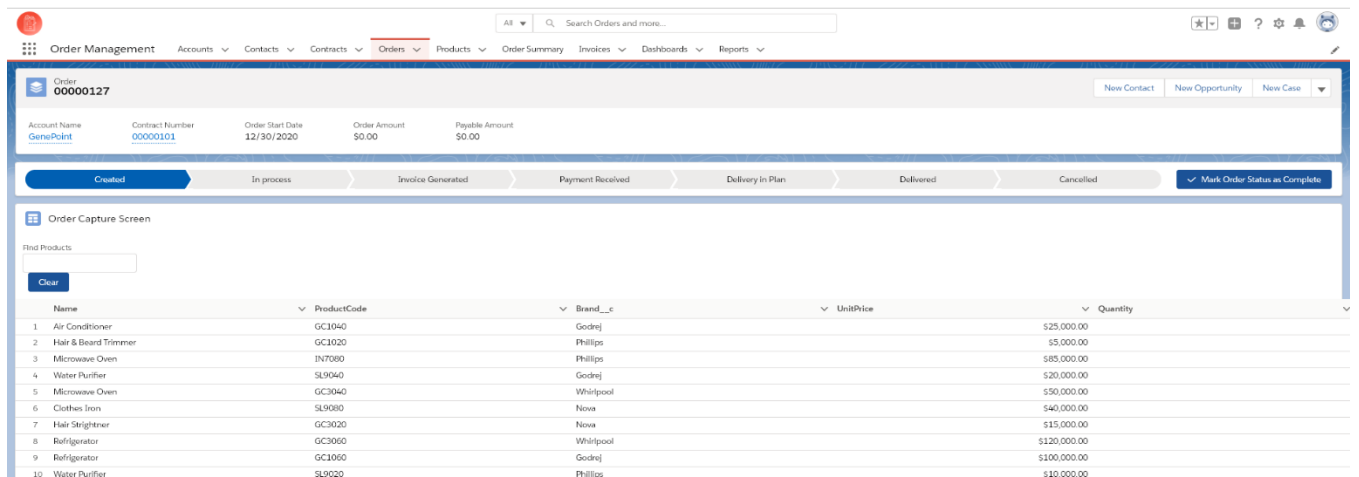
## 1. New Order



The 'New Order' form is a modal window with a title bar. It contains the following fields and controls:

- Account ID:** A text input field with a dropdown arrow and a close button (X).
- \*Order Start Date:** A date input field showing 'May 6, 2020' with a calendar icon.
- Contract ID:** A text input field with a dropdown arrow and a close button (X).
- \*Status:** A dropdown menu with 'Draft' selected.
- Create Order:** A primary button.
- Cancel:** A secondary button.

## 2. Order Created



The 'Order Created' screen displays the following information and controls:

- Order Header:** Order ID 00000127, with buttons for 'New Contact', 'New Opportunity', and 'New Case'.
- Account Information:** Account Name: GenePoint, Contract Number: 00000101, Order Start Date: 12/30/2020, Order Amount: \$0.00, Payable Amount: \$0.00.
- Order Status Flow:** A sequence of steps: Created (active), In process, Invoice Generated, Payment Received, Delivery in Plan, Delivered, Cancelled. A 'Mark Order Status as Complete' button is at the end.
- Order Capture Screen:** A section with a 'Find Products' search bar and a 'Clear' button.
- Product List Table:**

	Name	ProductCode	Brand__c	UnitPrice	Quantity
1	Air Conditioner	GC1040	Godrej		\$25,000.00
2	Hair & Beard Trimmer	GC1020	Phillips		\$5,000.00
3	Microwave Oven	IN7080	Phillips		\$85,000.00
4	Water Purifier	SL9040	Godrej		\$20,000.00
5	Microwave Oven	GC3040	Whirlpool		\$50,000.00
6	Clothes Iron	SL9080	Nova		\$40,000.00
7	Hair Straightener	GC3020	Nova		\$15,000.00
8	Refrigerator	GC3060	Whirlpool		\$120,000.00
9	Refrigerator	GC1060	Godrej		\$100,000.00
10	Water Purifier	SL9020	Phillips		\$10,000.00

### 3. Search or Add Products

Order Management Accounts Contacts Contracts **Orders** Products Order Summary Invoices Dashboards Reports

Order 00000127

Account Name: GenePoint Contract Number: 00000101 Order Start Date: 12/30/2020 Order Amount: \$0.00 Payable Amount: \$0.00

Created In process Invoice Generated Payment Received Delivery in Plan Delivered Cancelled [Mark Order Status as Complete](#)

Order Capture Screen

Find Products: hair [Clear](#)

Name	ProductCode	Brand_c	UnitPrice	Quantity
1 Hair & Beard Trimmer	GC1020	Phillips	\$5,000.00	6
2 Hair Straightener	GC3020	Nova	\$15,000.00	12
3 Hair and Beard Trimmer	GC5060	Nova	\$150,000.00	
4 Hair Dryer	123	Phillips	\$1,005.00	

[Cancel](#) [Save](#)

### 4. Products Inserted

Order Management Accounts Contacts Contracts **Orders** Products Order Summary Invoices Dashboards Reports

Order 00000127 [Records Inserted](#)

Account Name: GenePoint Contract Number: 00000101 Order Start Date: 12/30/2020 Order Amount: \$0.00 Payable Amount: \$0.00

Created In process Invoice Generated Payment Received Delivery in Plan Delivered Cancelled [Mark Order Status as Complete](#)

Order Capture Screen

Find Products: [Clear](#)

Name	ProductCode	Brand_c	UnitPrice	Quantity
1 Air Conditioner	GC1040	Godrej	\$25,000.00	
2 Hair & Beard Trimmer	GC1020	Phillips	\$5,000.00	
3 Microwave Oven	IN7080	Phillips	\$85,000.00	
4 Water Purifier	SL9040	Godrej	\$20,000.00	
5 Microwave Oven	GC3040	Whirlpool	\$50,000.00	
6 Clothes Iron	SL9080	Nova	\$40,000.00	
7 Hair Straightener	GC3020	Nova	\$15,000.00	
8 Refrigerator	GC3060	Whirlpool	\$120,000.00	
9 Refrigerator	GC1060	Godrej	\$100,000.00	
10 Water Purifier	SL9020	Phillips	\$10,000.00	

### 5. Order Products

Order Management Accounts Contacts Contracts **Orders** Products Order Summary Invoices Dashboards Reports

Orders > 00000127 [Add Products](#) [Edit Products](#)

Order Products

2 Items - Sorted by Created Date - Updated a few seconds ago

Product	Product Code	Quantity	Unit Price	Total Price	Line Description
1 Hair & Beard Trimmer	GC1020	6.00	\$5,000.00	\$30,000.00	
2 Hair Straightener	GC3020	12.00	\$15,000.00	\$195,000.00	

## 6. Inserted in Order Summary

Order Management

Accounts

Contacts

Contracts

Orders

Products

Order Summary

Invoices

Dashboards

Reports

All

Q

Search Salesforce

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00000127

Amount: \$210000

Total Quantity: 19

Confirm Order

Cancel Order

Products

Hair Strightner

Product Code: GC3020

Brand: Nova

Stock Quantity: 27

Quantity: 13

Update Item

Delete Item

Hair & Beard Trimmer

Product Code: GC3020

Brand: Phillips

Stock Quantity: 94

Quantity: 6

Update Item

Delete Item

## 7. Order Summary

Order Management

Accounts

Contacts

Contracts

Orders

Products

Order Summary

Invoices

Dashboards

Reports

All

Q

Search Salesforce

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00000116

Amount: \$1175030

Total Quantity: 36

Confirm Order

Cancel Order

Products

Mixer

Product Code: IN7060

Brand: Whirlpool

Stock Quantity: 34

Quantity: 2

Update Item

Delete Item

Water Purifier

Product Code: SL9060

Brand: Nova

Stock Quantity: 12

Quantity: 10

Update Item

Delete Item

Hair Dryer

Product Code: 123

Brand: Phillips

Stock Quantity: 0

Quantity: 3

Update Item

Delete Item

Hair and Beard Trimmer

Product Code: GC5060

Brand: Nova

Stock Quantity: 70

Quantity: 2

Update Item

Delete Item

Water Purifier

Product Code: SL9060

Brand: Nova

Stock Quantity: 12

Quantity: 7

Update Item

Delete Item

Washing Machine

Product Code: 111

Brand: Whirlpool

Stock Quantity: 173

Quantity: 2

Update Item

Enter Quantity

Save

Cancel

Delete Item

Air Conditioner

Product Code: GC1040

Brand: Godrej

Stock Quantity: 30

Quantity: 1

Update Item

Delete Item

Mixer

Product Code: IN7060

Brand: Whirlpool

Stock Quantity: 34

Quantity: 3

Update Item

Delete Item

Mixer

Product Code: IN7040

Brand: Godrej

Stock Quantity: 12

Quantity: 7

Update Item

Delete Item

Hair Dryer

Product Code: 123

Brand: Phillips

Stock Quantity: 0

Quantity: 7

Update Item

Delete Item

## 8. Submitted for approval once confirm button clicked.

**Order 00000127**

Account Name: **GenePoint** Contract Number: **00000101** Order Start Date: **10/28/2020** Order Amount: **\$225,000.00** Payable Amount: **\$210,000.00**

**Order History (3)**

Date	Field	User	Original Value	New Value
5/5/2020, 10:24 AM	Record locked.	Test User		
5/4/2020, 8:12 AM	Order Start Date	Kalash Rastogi	2020-04-30	2020-12-30
4/27/2020, 5:49 AM	Created.	Test User		

**Notes & Attachments (0)**

**Invoices (0)**

**Approval History (2)**

Step Name	Date	Status	Assigned To
Step 1	5/5/2020, 10:24 AM	Pending	Kalash Rastogi
Approval Request Submitted	5/5/2020, 10:24 AM	Submitted	Test User

**Upcoming & Overdue**

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

## 9. Order Status changed to Cancelled when cancel button clicked.

**Order 00000126**

Account Name: **GenePoint** Contract Number: **00000101** Order Start Date: **10/28/2020** Order Amount: **\$225,000.00** Payable Amount: **\$210,000.00**

**Order Status: Cancelled**

**Order Capture Screen**

Find Products

**Products List:**

Name	ProductCode	Brand_c	UnitPrice	Quantity
1 Air Conditioner	GC1040	Godrej		\$25,000.00
2 Hair & Beard Trimmer	GC1020	Phillips		\$5,000.00
3 Microwave Oven	IN7080	Phillips		\$85,000.00
4 Water Purifier	SL9040	Godrej		\$20,000.00
5 Microwave Oven	GC3040	Whirlpool		\$50,000.00
6 Clothes Iron	SL9080	Nova		\$40,000.00
7 Hair Strightrner	GC3020	Nova		\$15,000.00
8 Refrigerator	GC3060	Whirlpool		\$120,000.00
9 Refrigerator	GC1060	Godrej		\$100,000.00
10 Water Purifier	SL9020	Phillips		\$10,000.00
11 Clothes Iron	GC5040	Phillips		\$75,000.00
12 Water Purifier	IN7020	Whirlpool		\$5,000.00
13 Water Purifier	SL9060	Nova		\$30,000.00
14 Washing Machine	GC5020	Godrej		\$35,000.00
15 Mixer	IN7040	Godrej		\$20,000.00
16 Hair and Beard Trimmer	GC5060	Nova		\$150,000.00
17 Mixer	IN7060	Whirlpool		\$50,000.00
18 Hair Dryer	123	Phillips		\$1,005.00
19 Washing Machine	111	Whirlpool		\$12,000.00

## 10. Order Status changed to In Process (When submitted for Approval).

The screenshot displays the 'Order Management' interface for Order 00000127. The order is currently in the 'In process' stage, indicated by a blue bar in the progress timeline. The timeline includes stages: In process, Invoice Generated, Payment Received, Delivery in Plan, Delivered, and Cancelled. A 'Mark Order Status as Complete' button is visible at the end of the timeline.

Order Details:

- Order: 00000127
- Account Name: GensPoint
- Contact Number: 00000101
- Order Start Date: 12/30/2020
- Order Amount: \$225,000.00
- Payable Amount: \$210,000.00

Order Capture Screen:

Name	ProductCode	Brand...	UnitPrice	Quantity
1 Air Conditioner	GC1040	Godrej		\$25,000.00
2 Hair & Beard Trimmer	GC1020	Phillips		\$5,000.00
3 Microwave Oven	IN7080	Phillips		\$85,000.00
4 Water Purifier	SL9040	Godrej		\$20,000.00
5 Microwave Oven	GC3040	Whirlpool		\$50,000.00
6 Clothes Iron	SL9080	Nova		\$40,000.00
7 Hair Straightner	GC3020	Nova		\$15,000.00
8 Refrigerator	GC3060	Whirlpool		\$120,000.00
9 Refrigerator	GC1060	Godrej		\$100,000.00
10 Water Purifier	SL9020	Phillips		\$10,000.00
11 Clothes Iron	GC5040	Phillips		\$75,000.00
12 Water Purifier	IN7020	Whirlpool		\$5,000.00
13 Water Purifier	SL9060	Nova		\$30,000.00
14 Washing Machine	GC5020	Godrej		\$35,000.00
15 Mixer	IN7040	Godrej		\$20,000.00
16 Hair & Beard Trimmer	GC5060	Nova		\$150,000.00
17 Mixer	IN7060	Whirlpool		\$50,000.00
18 Hair Dryer	123	Phillips		\$1,005.00
19 Washing Machine	111	Whirlpool		\$12,000.00

## 11. Approval by Business User (Approved).

The screenshot shows the 'Order Management' interface for Order 00000126. An 'Approve Order' dialog box is open, allowing a business user to approve the order. The dialog includes a 'Comments' field with the text 'Approved By Business User' and buttons for 'Cancel' and 'Approve'.

Order Details:

- Order: 00000126
- Product: Hair & Beard Trimmer (GC1020) - 6.00 units at \$5,000.00 each
- Product: Hair Straightner (GC3020) - 13.00 units at \$15,000.00 each

Order History (3):

Date	Field	User
5/5/2020, 10:29 AM	Record locked.	Test User
5/4/2020, 8:12 AM	Order Start Date	Kalash Rastogi
4/27/2020, 5:46 AM	Created.	Test User

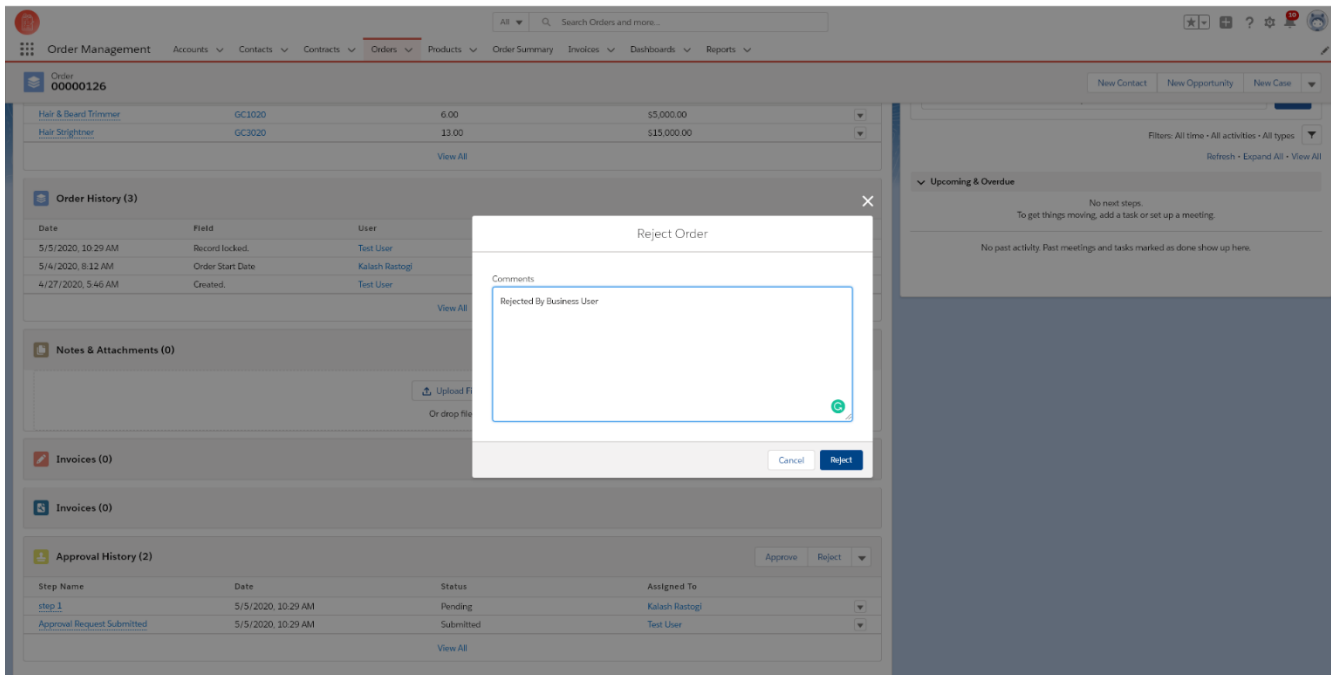
Notes & Attachments (0)

Invoices (0)

Approval History (2):

Step Name	Date	Status	Assigned To
Step 1	5/5/2020, 10:29 AM	Pending	Kalash Rastogi
Approval Request Submitted	5/5/2020, 10:29 AM	Submitted	Test User

## 12. Approval by Business User (Rejected).



The screenshot shows the 'Order Management' interface for Order 00000126. A 'Reject Order' dialog box is open, prompting for a comment. The comment field contains 'Rejected By Business User'. The background interface shows the 'Order History' and 'Approval History' sections.

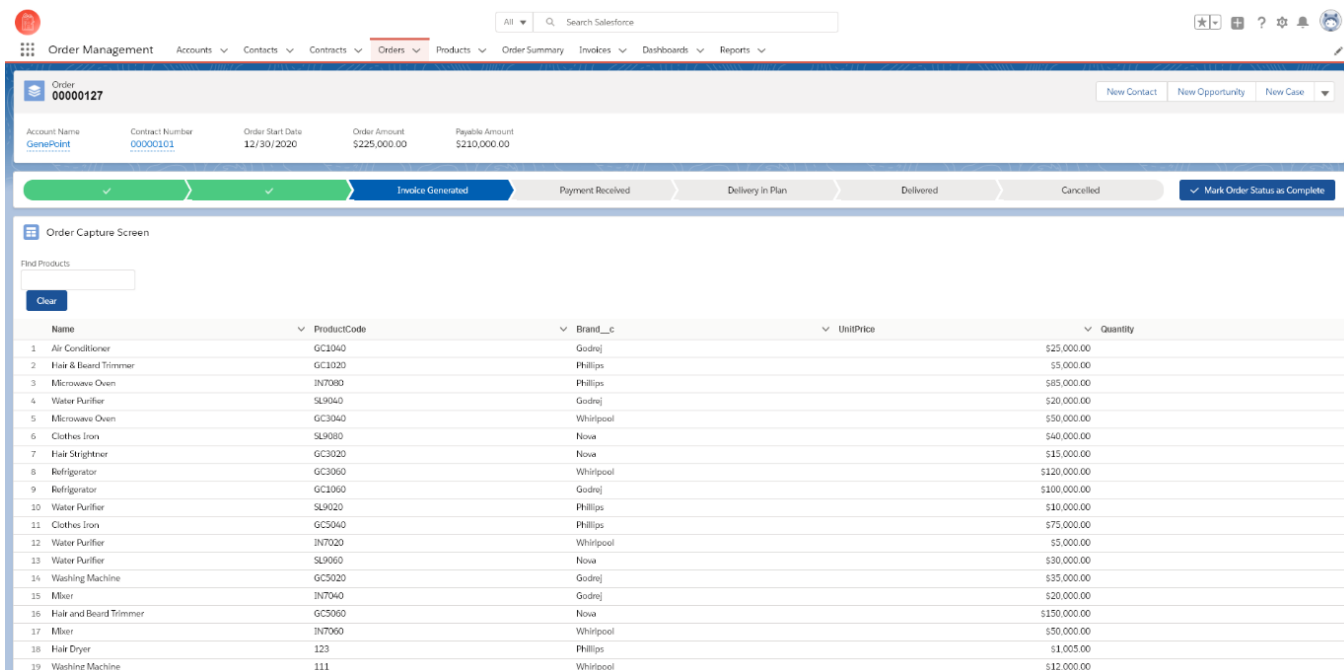
**Order History (3)**

Date	Field	User
5/5/2020, 10:29 AM	Record locked.	Test User
5/4/2020, 8:12 AM	Order Start Date	Kalash Rastogi
4/27/2020, 5:46 AM	Created.	Test User

**Approval History (2)**

Step Name	Date	Status	Assigned To
step 1	5/5/2020, 10:29 AM	Pending	Kalash Rastogi
Approval Request Submitted	5/5/2020, 10:29 AM	Submitted	Test User

## 13. Order Status changed to Invoice Generated (Once Approved).



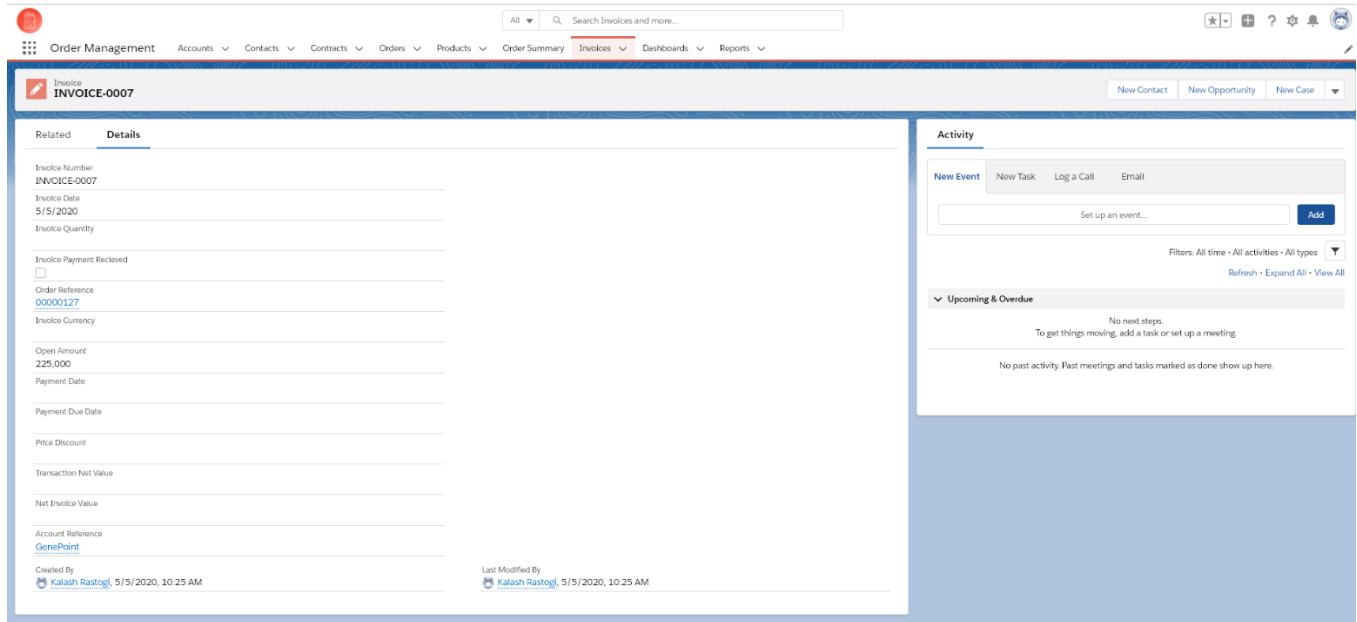
The screenshot shows the 'Order Management' interface for Order 00000127. The 'Order Status' is 'Invoice Generated'. The 'Order Capture Screen' displays a list of products with their details.

**Order Progress:** Invoice Generated (highlighted), Payment Received, Delivery in Plan, Delivered, Cancelled.

**Order Capture Screen**

Name	ProductCode	Brand_c	UnitPrice	Quantity
1 Air Conditioner	GC1040	Godrej		\$25,000.00
2 Hair & Beard Trimmer	GC1020	Phillips		\$5,000.00
3 Microwave Oven	IN7090	Phillips		\$85,000.00
4 Water Purifier	SL9040	Godrej		\$20,000.00
5 Microwave Oven	GC3040	Whirlpool		\$50,000.00
6 Clothes Iron	SL9080	Nova		\$40,000.00
7 Hair Strightrner	GC3020	Nova		\$15,000.00
8 Refrigerator	GC3060	Whirlpool		\$120,000.00
9 Refrigerator	GC1060	Godrej		\$100,000.00
10 Water Purifier	SL9020	Phillips		\$10,000.00
11 Clothes Iron	GC5040	Phillips		\$75,000.00
12 Water Purifier	IN7020	Whirlpool		\$5,000.00
13 Water Purifier	SL9060	Nova		\$30,000.00
14 Washing Machine	GC5020	Godrej		\$35,000.00
15 Mixer	IN7040	Godrej		\$20,000.00
16 Hair and Beard Trimmer	GC5060	Nova		\$150,000.00
17 Mixer	IN7060	Whirlpool		\$50,000.00
18 Hair Dryer	123	Phillips		\$1,005.00
19 Washing Machine	111	Whirlpool		\$12,000.00

## 14. Invoice record created.



Order Management Accounts Contacts Contracts Orders Products Order Summary **Invoices** Dashboards Reports

Invoice **INVOICE-0007** New Contact New Opportunity New Case

Related **Details**

Invoice Number  
INVOICE-0007

Invoice Date  
5/5/2020

Invoice Quantity

Invoice Payment Received  
☐

Order Reference  
00000127

Invoice Currency

Open Amount  
225,000

Payment Date

Payment Due Date

Price Discount

Transaction Net Value

Net Invoice Value

Account Reference  
GenePoint

Created By  
Kalash Rastogi, 5/5/2020, 10:25 AM

Last Modified By  
Kalash Rastogi, 5/5/2020, 10:25 AM

**Activity**

New Event Now Task Log a Call Email

Set up an event... Add

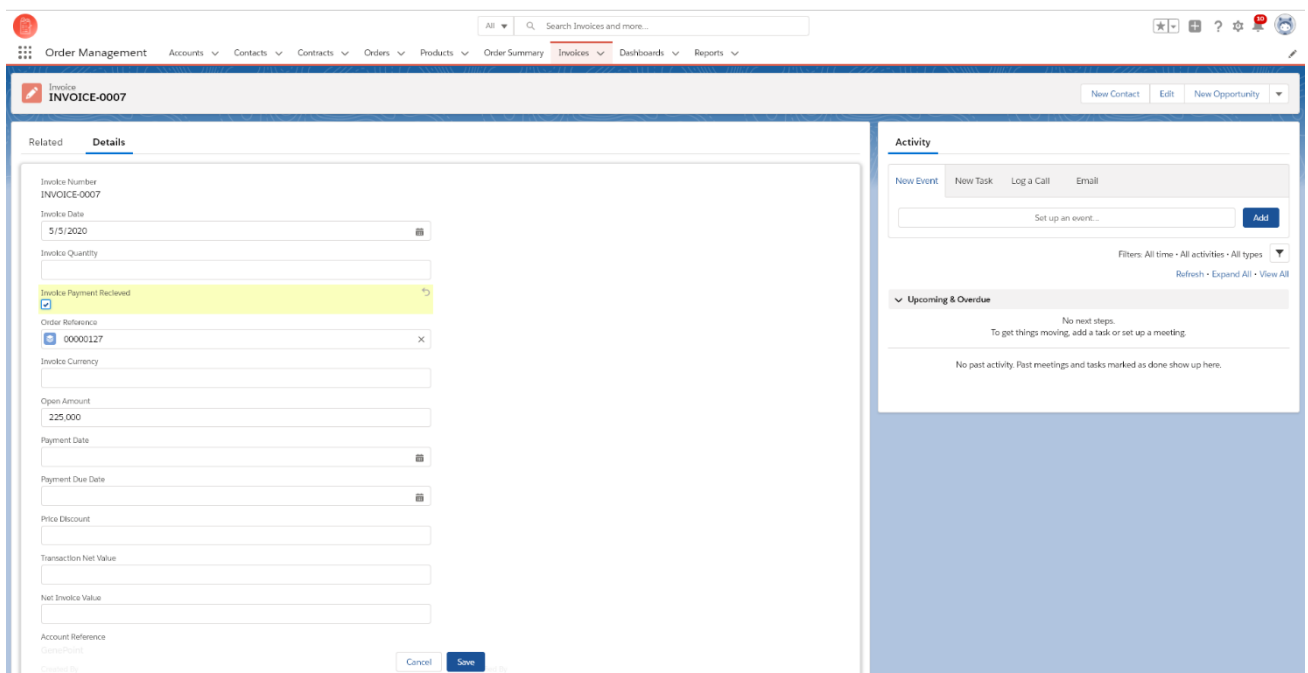
Filters: All time • All activities • All types  
Refresh • Expand All • View All

**Upcoming & Overdue**

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

## 15. Payment Received checkbox in Invoice record can be checked by Business user.



Order Management Accounts Contacts Contracts Orders Products Order Summary **Invoices** Dashboards Reports

Invoice **INVOICE-0007** New Contact Edit New Opportunity

Related **Details**

Invoice Number  
INVOICE-0007

Invoice Date  
5/5/2020

Invoice Quantity

Invoice Payment Received  
☒

Order Reference  
00000127

Invoice Currency

Open Amount  
225,000

Payment Date

Payment Due Date

Price Discount

Transaction Net Value

Net Invoice Value

Account Reference  
GenePoint

Created By  
Kalash Rastogi, 5/5/2020, 10:25 AM

Cancel Save

**Activity**

New Event Now Task Log a Call Email

Set up an event... Add

Filters: All time • All activities • All types  
Refresh • Expand All • View All

**Upcoming & Overdue**

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

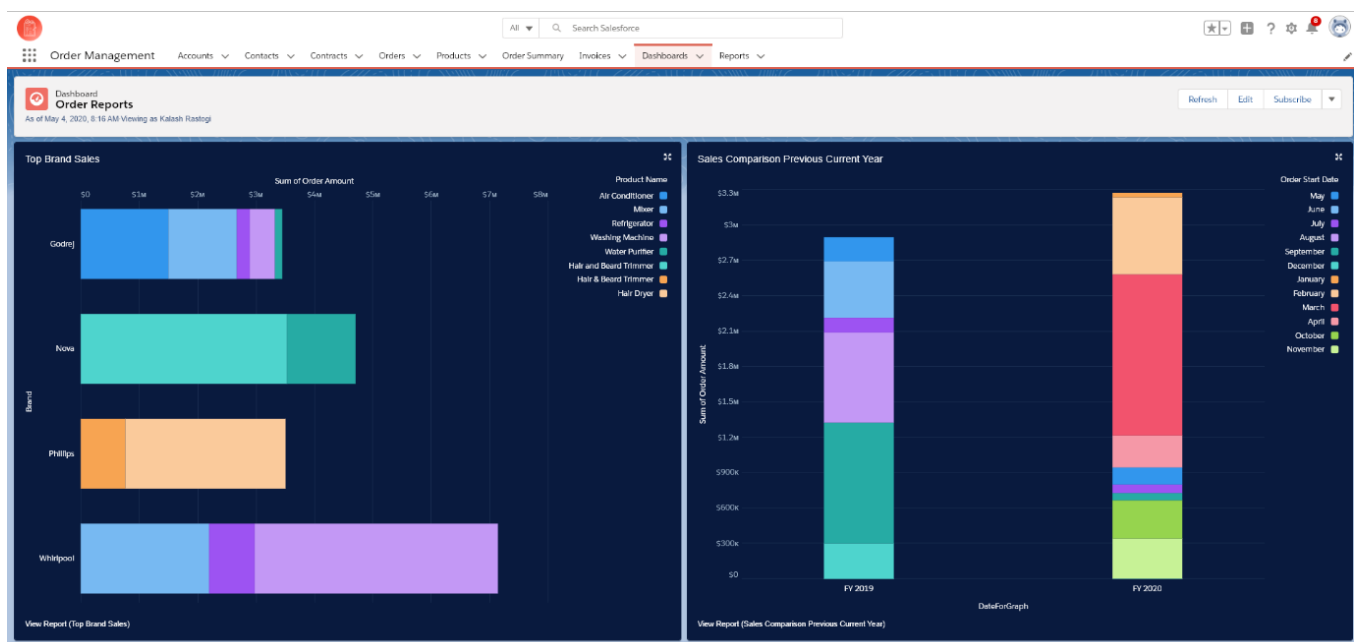


## 16. Once payment received checkbox checked order stage changed to Payment Received.

The screenshot displays the 'Order Management' interface for Order 00000127. The order status is 'Payment Received', indicated by a blue bar in the progress sequence. The order details show an account name of 'GenePoint', contact number '00000101', order start date '12/30/2020', order amount '\$225,000.00', and payable amount '\$210,000.00'. Below the order details, the 'Order Capture Screen' shows a list of products with columns for Name, ProductCode, Brand, UnitPrice, and Quantity. The products listed include Air Conditioner, Hair & Beard Trimmer, Microwave Oven, Water Purifier, Clothes Iron, Hair Straightener, Refrigerator, and Washing Machine, among others.

Name	ProductCode	Brand	UnitPrice	Quantity
1 Air Conditioner	GC1040	Godrej	\$25,000.00	
2 Hair & Beard Trimmer	GC1020	Phillips	\$5,000.00	
3 Microwave Oven	IN7080	Phillips	\$85,000.00	
4 Water Purifier	SL9040	Godrej	\$20,000.00	
5 Microwave Oven	GC3040	Whirlpool	\$50,000.00	
6 Clothes Iron	SL9080	Nova	\$40,000.00	
7 Hair Straightener	GC3020	Nova	\$15,000.00	
8 Refrigerator	GC3060	Whirlpool	\$120,000.00	
9 Refrigerator	GC1060	Godrej	\$100,000.00	
10 Water Purifier	SL9020	Phillips	\$10,000.00	
11 Clothes Iron	GC3040	Phillips	\$75,000.00	
12 Water Purifier	IN7020	Whirlpool	\$5,000.00	
13 Water Purifier	SL9060	Nova	\$30,000.00	
14 Washing Machine	GC3020	Godrej	\$35,000.00	
15 Mixer	IN7040	Godrej	\$20,000.00	
16 Hair and Beard Trimmer	GC3060	Nova	\$150,000.00	
17 Mixer	IN7060	Whirlpool	\$50,000.00	
18 Hair Dryer	123	Phillips	\$1,005.00	
19 Washing Machine	111	Whirlpool	\$12,000.00	

## 17. Dashboard of sales comparison and top brands reports.



## OBJECTS :

### Standard Objects:

#### 1) **Account** : Stores details of an account

Fields :

- a. Account Name : String
- b. Email opt Out : Checkbox (Additional)

Relationships :

- a. Sold To : Lookup (Contact)
- b. Ship To : Lookup (Contact)

#### 2) **Contact** : Stores details of a contact

Fields :

- a. Name : String
- b. Email : Email
- c. Email opt Out : Checkbox (Additional)

Relationships :

- a. Account Name : Lookup (Account)

#### 3) **Contract** : Orders are made with reference to an existing contract

Fields :

- a. Contract Number : Auto Number
- b. Contract Start Date : Date
- c. Contract Term : Number
- d. Status : Picklist

Relationships :

- a. Account Name : Lookup (Account)

#### 4) **Product** : Stores details for a product

Fields :

- a. Product Name : String
- b. Brand : String (Additional)
- c. Product Code : String
- d. Stock Quantity : Number (Additional)

**5) Price Book Entry :** Price entry for a product in a price book

Fields :

- a. Product Code : String
- b. List Price : Currency

Relationships :

- a. Price Book : Lookup (Price Book)
- b. Product : Lookup (Product)

**6) Price Book :** Stores price listings of different products.

Fields :

- a. Price Book Name : String
- b. Active : Checkbox
- c. Is Standard Price Book : Checkbox?

**7) Order :** Stores details of an order

Fields:

- a. Order Start Date: Date
- b. Stage: Picklist
- c. Order Status: Picklist (Additional)
- d. Order Amount: Currency

Relationships:

- a. Account Name: Lookup (Account)
- b. Contract Name: Lookup (Contract)
- c. Bill to Contact: Lookup (Contact)
- d. Ship to Contact: Lookup (Contact)

**8) Order Product:** Stores product entries for an order

Fields:

- a. List Price: Currency
- b. Unit Price: Currency
- c. Total Price: Currency
- d. Quantity: Number

Relationships:

- a. Order: Lookup (Order)
- b. Product: Lookup (Product)
- c. Invoice: Lookup (Invoice)

**Custom Objects:**

**1) Product Invoice:** Invoice details for a product in an order

Fields:

- a. Invoice Number: Auto Number
- b. Invoice Quantity: Number
- c. Unit Price: Currency
- d. Transactional Net Value: Currency
- e. Discount: Percent
- f. Net Invoice Value: Currency
- g. Transaction Currency: Picklist

Relationships:

- a. Order Line Item Number: Lookup (Order Product)
- b. Product: Lookup (Product)

**2) Invoice:** Stores details of an invoice of an order

Fields:

- a. Invoice Number: Auto Number

- b. Invoice Quantity: Number
- c. Invoice Date: Date
- d. Open Amount: Currency
- e. Payment Due Date: Date
- f. Net Transactional Value: Currency
- g. Discount: Percent
- h. Net Invoice Value: Currency
- i. Invoice Currency: Picklist

Relationships:

- a. Account Reference: Lookup (Account)
- b. Order Reference: Master-Detail (Order)

## **LIGHTNING WEB COMPONENTS :**

### **1. editOrder**

This lightning web component displays the editable fields of the order a user can edit and save them. When standard edit button is clicked, then this component is displayed.

### **2. newOrder**

This lightning web component displays a record form to insert order record. When the standard new button is clicked this component will be displayed.

### **3. orderSummary**

This lightning web component will display the order details which are in their created stage and have some products in it. On clicking confirm button, an approval will be sent based on some condition and on Cancel button, the order status will be changed to cancelled. Also, the user can edit the quantity of the product present in order and can remove a product from the order.

### **4. orderCapture**

This lightning web components displays the order capture screen with search functionality, the user can search products and can add those in the order by entering quantity.

## **AURA COMPONENTS :**

### **1. OrderMgmtNew**

This aura component composed with newOrder lwc component. This is used to override standard new button in Order tab.

### **2. OrderMgmtEdit**

This aura component composed with editOrder lwc component. This is used to override standard edit button in Order tab.

## **APEX CLASSES:**

### **1. orderSummaryController:**

This class have 3 methods (getAllOrders, updateOrderItem, deleteOrderItem) and these are called from the OrderSummary component to update, delete, and fetch records.

### **2. EmailNotification:**

This class has a method that is used to send the Order status via email to the contacts associated with that order. This method is called from process builder and it will take two arguments order ID, Account ID.

### **3. productAuraService:**

This class have 2 methods (getProductList, InsertOrderItem) and these methods will be called from OrderCaptureScreen component to fetch the product list and insert selected product to the order.

### **4. submitForApproval:**

This class has a method that will send the approval it is called from OrderSummary component when confirm button is clicked.

### **5. cancelOrder:**

This class has a method which changes the status of order to 'Cancelled' with remarks 'Cancelled via button' and it is called from OrderSummary component when Cancel button is clicked.

## **APEX TRIGGERS :**

### **1. ManageFiveAccounts**

When sales user inserts an account, this trigger will come into action and gives an error if number of accounts managed by that user exceeds 5.

### **2. addPriceBookId**

When an order is created it will be associated with standard pricebook.

### **3. OrderRestriction**

Before inserting an order record this trigger will check if the owner of that record is sales user or not.

## **PROCESSES :**

### **1. Change Stock Quantity**

This Process is on Order Product which will update stock quantity of the product when the quantity entered by the user. Also it will add a free product to the Order if the entered quantity is greater than 10 and calculate the payable amount as per the quantity.

### **2. Order Status Changed Notification**

This process will send the email whenever there is change in status of order by calling EmailNotification apex class.

### **3. Generate invoice**

This process creates an invoice record when the order is confirmed through approval by higher authorities.

### **4. Payment Received**

When the payment received checkbox in invoice is checked, then this process builder updates the order stage to payment received.

## **APPROVAL PROCESSES :**

### **1. Approval for Order Amount**

This handles the order approval process and auto approves orders with an amount less than \$100000 otherwise sends it to the designated approver. Upon approval it activates the order and upon rejection it also activates the order and locks it for further changes.

## **VALIDATION RULES :**

### **1. Stock\_Quantity**

This validation rule is on Order Product and will prevent insertion of record if the entered quantity of product is more than stock quantity of that product.

### **2. Order\_Remarks\_Mandatory**

When order stage is selected as Cancelled then Order remarks are mandatory to enter.