

Order



Management

App

Prepared for:

Salesforce Training Program
Capgemini Technology Services

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Abstract:

The Order Management app is a system to keep track of orders and sales for a company. The sales user can add products and create product invoices. The sales user can generate Invoice for the order. The status of the order is updated systematically with order progress. Customer and sales user can also get email alert for every status update of the order if they want. It generates reports for all the sales and top 10 brand which are sold. It has the dashboard to keep track of the reports generated.

Scope:

Following is the functionality provided by Order Management App:

There are 3 types of user in this app:

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

Support User:

- I. Create business users and sales user
- II. View whole data
- III. Manage Accounts, Contacts and Contracts
- IV. Manage Products
- V. View all Orders
- VI. Approve or reject orders

Business User:

- I. View 2 sales user data
- II. View Order
- III. View Products
- IV. View reports
- V. View dashboards

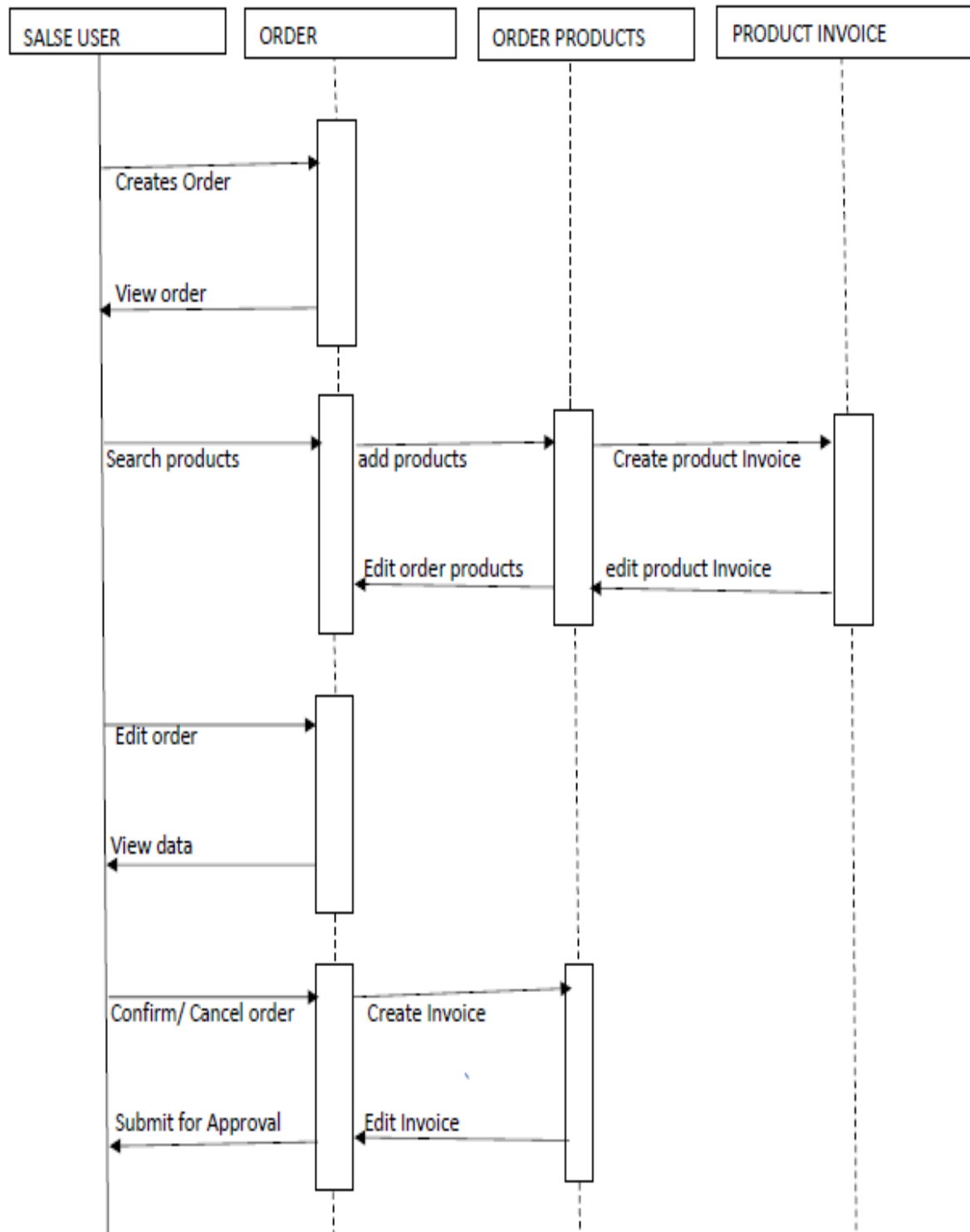
Sales User:

- I. Create Account
- II. Create contact
- III. Manage Order
- IV. Search products
- V. Add products
- VI. Confirm/cancel order

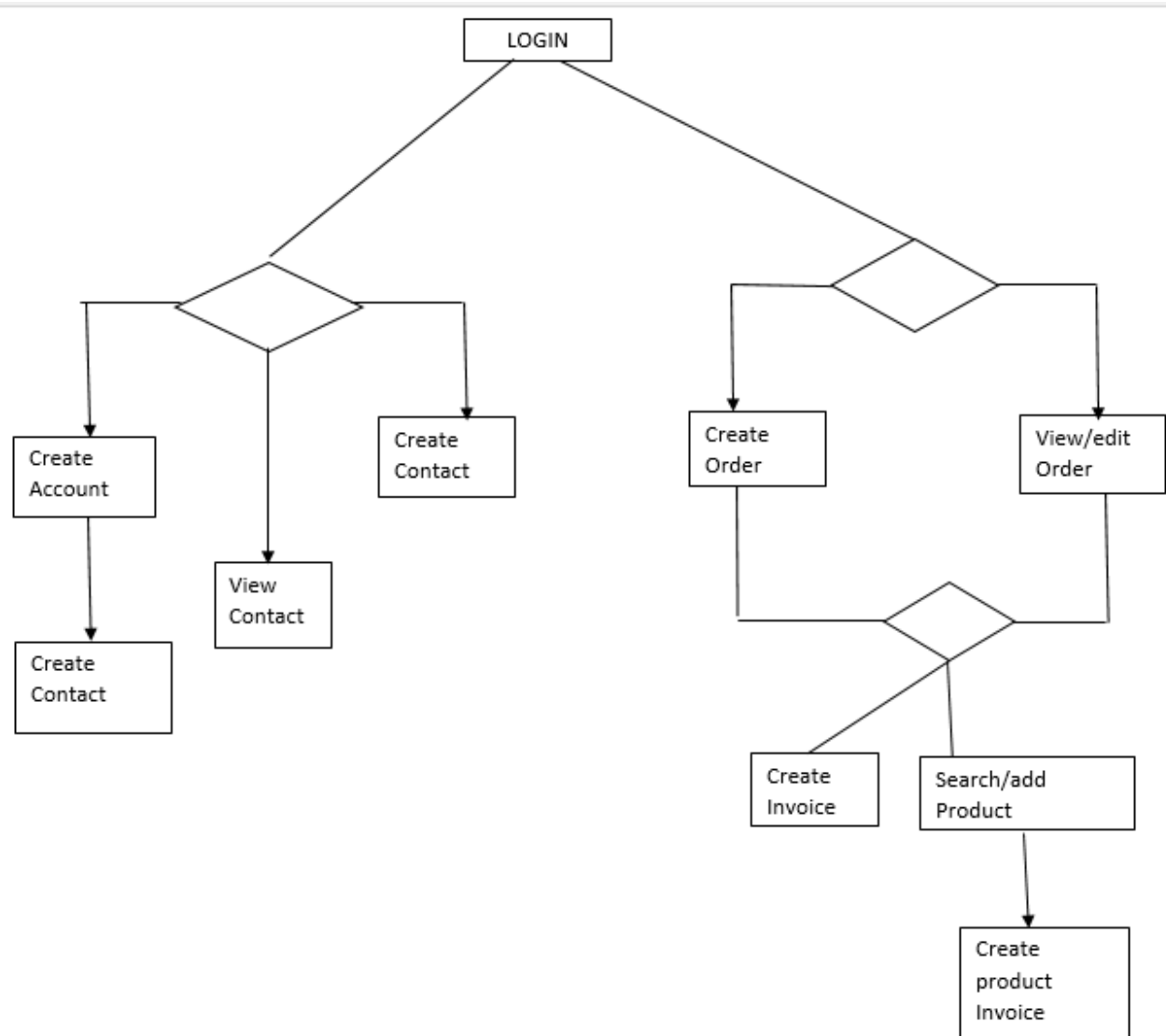
Class Diagram:



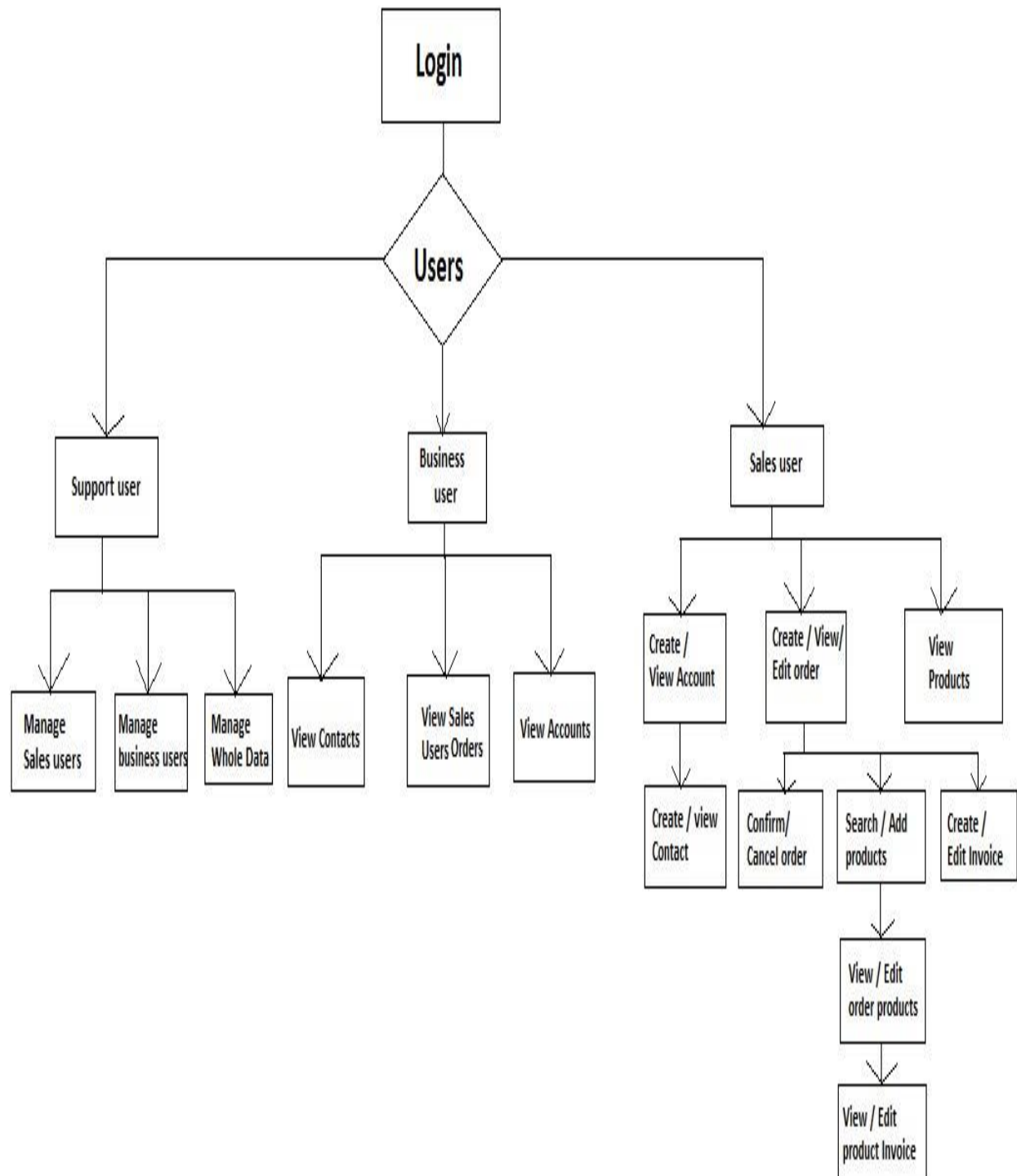
Sequence Diagram:



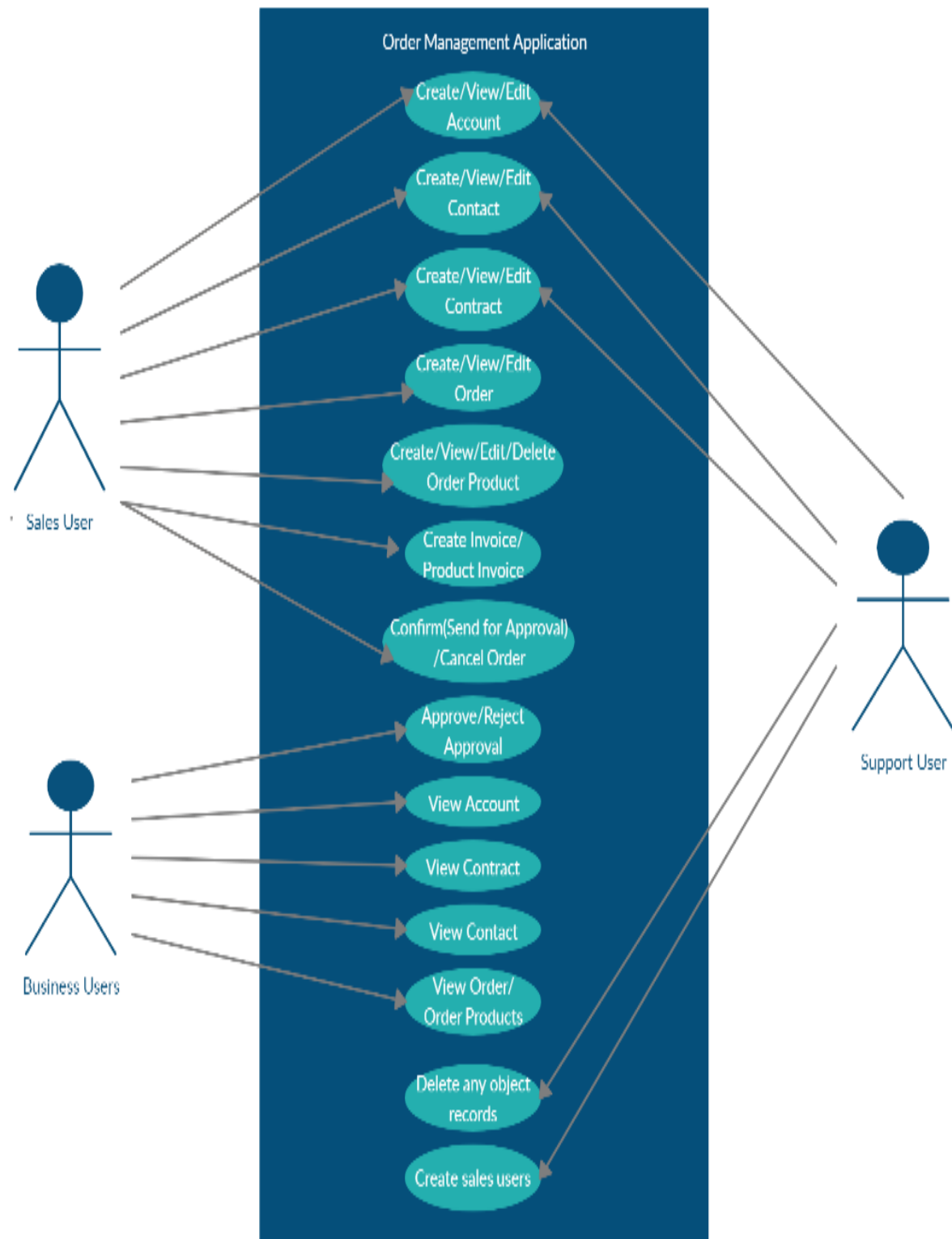
Activity Diagram:



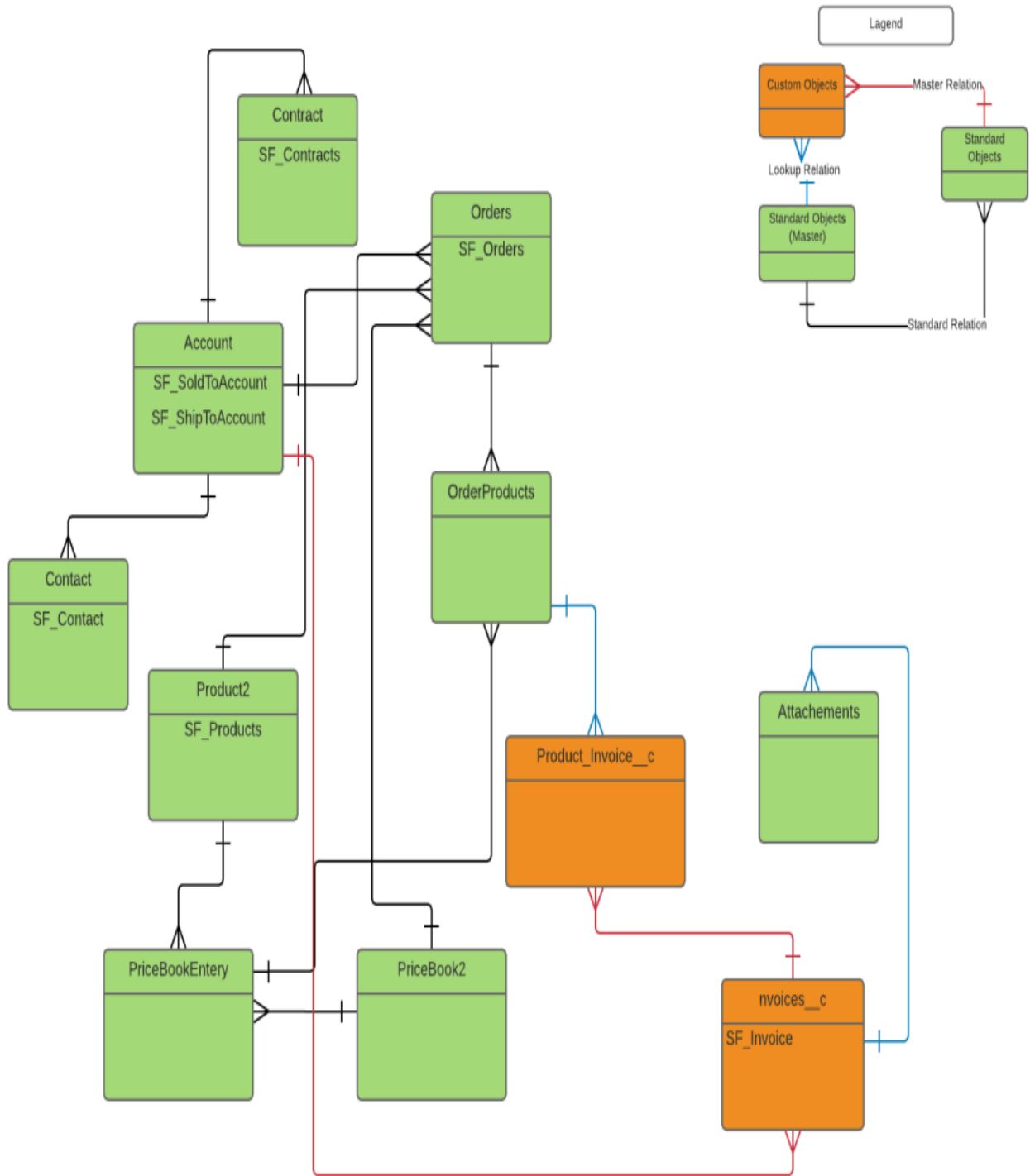
Flow Diagram:



Use Case Diagram:



Entity Relationship Diagram:



Screenshots (LWC):

Account ID

Search Accounts...

* Order Start Date

Contract ID

Search Contracts...

* Status

--None--

Order Type

--None--

Shipping Street

Shipping City


Shipping State/Province

Shipping Zip/Postal Code

Shipping Country

Billing Street

Figure a Order: New Button Page



All ▾

★ ▾

📄

?

⚙️

🔔

👤

☰

Sales

Home

Orders ▾

Products ▾

Accounts ▾

Contacts ▾

Dashboards ▾

Reports ▾

Invoices ▾

Contracts ▾

↗️

Order Number

00000100

Account ID

🏢

United Oil & Gas Corp.

X

* Order Start Date

Apr 22, 2020

📅

Contact ID

🏢

00000100

X

* Status

Draft

▾

Order Type

-None-

▾

Shipping Street

Shipping Street

↗️

Shipping City

Shipping State/Province

Shipping City

Shipping State/Province

Shipping Zip/Postal Code

Shipping Country

Shipping Zip/Postal Code


Shipping Country

Figure b Order:Edit button Page

Owner ID	Total Quantity
Sales man1	18.00
Order Number	Total Order Amount
00000106	\$1,249,498.00
Order Start Date	Status
4/26/2020	Payment Recieved
Account ID	Shipping Address
Wifi Point	
Remarks	

Cancel Order
Confirm Order

Figure c Order: Record View

 Search Products

Search

<input type="checkbox"/>	Product Name	Product Code	Stock Quantity	Brand
<input type="checkbox"/>	Vivo z1 pro	VZ1P	100	VIVO
<input type="checkbox"/>	Samsung Galaxy S10	GX10	100	Samsung
<input type="checkbox"/>	Redmi Note 7 Pro	RN7P	100	Mi
<input type="checkbox"/>	Realme 6 Pro	R6P	100	Realme
<input type="checkbox"/>	Xiaomi Redmi Note 9 Pro	YPN0P	100	MI

javascriptvoid(0);

Clear
Next

Figure d Search Products

Order Products

Product Name	Partial Quantity	List Price	Unit Price
1 Samsung Galaxy S10	5	64,000	64,000
2 Redmi Note 7 Pro	17	15,000	15,000

Cancel

Save

Close

Figure e Add Products

Order ID	Total Price
00000106	\$324,500.00
Order Product Number	Quantity
0000000051	5.00
Start Date	Product ID
	Apple iPhone 11
Unit Price	
\$64,900.00	

Figure f Order Product record view

Validations:

- Support user can manage the whole data under this app
- Business user can manage 2 sales users and can only view data • Sales users can create order and edit it.
- Only Support users can delete the data • Sales user can manage 5 accounts each
- Sales users and customers gets Email notification who had subscribed to it upon every status update.
- Status is programmatically changed.
- Stock Quantity will increase/decrease based on order quantity created/edited respectively.
- If the order cancelled, the stock quantity increased for the respective products.
- A free product is added once if the product quantity added is greater than 10 and vice versa.
- Order Invoice and Product Invoice will be created once and can be edited.
- Sales user can cancel/confirm the order.
- If order amount > \$1000000, then it will go for support user approval else will be approved.
- Cancelled orders cannot be modified.
- One sales user cannot view data of other sales user.
- Quantity of a product will added if it smaller or equal than stock quantity of product.

Assumption:

- Only 2 active users can be there in salesforce free license so, approvals are from sales to support users.
- Free product will added to every product whose quantity>10 irrespective of their prices.
- Functionalities done in Lightning Web Components (LWC):
 - Searching of products in order
 - Adding of products to Order Products
 - Record view of an order
 - Record view of Order Products
 - Confirm/Cancel buttons of Order
 - Necessary error view
 - New and Edit button of Order is overridden with help of Aura.