

# 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

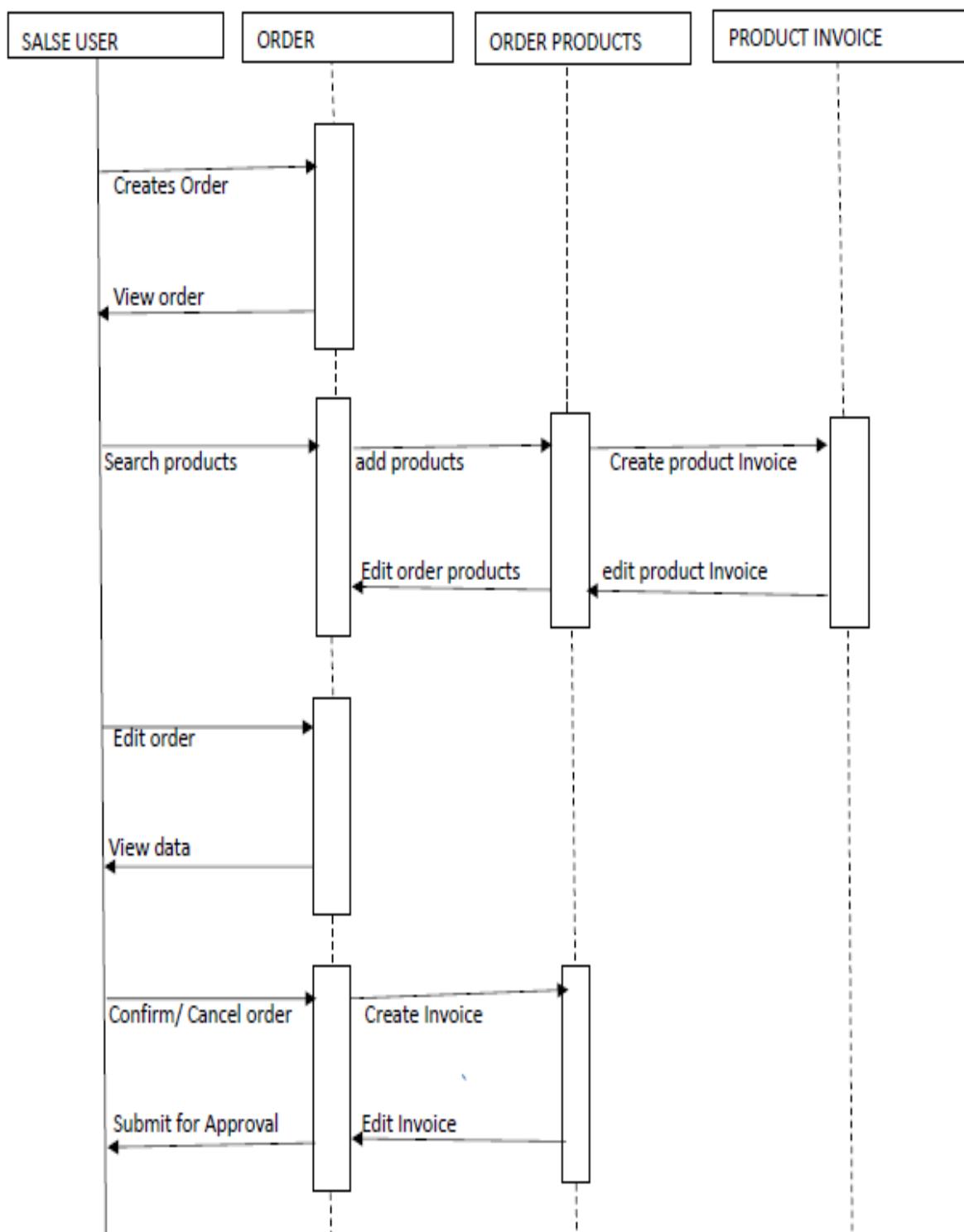
**Sales User:**

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

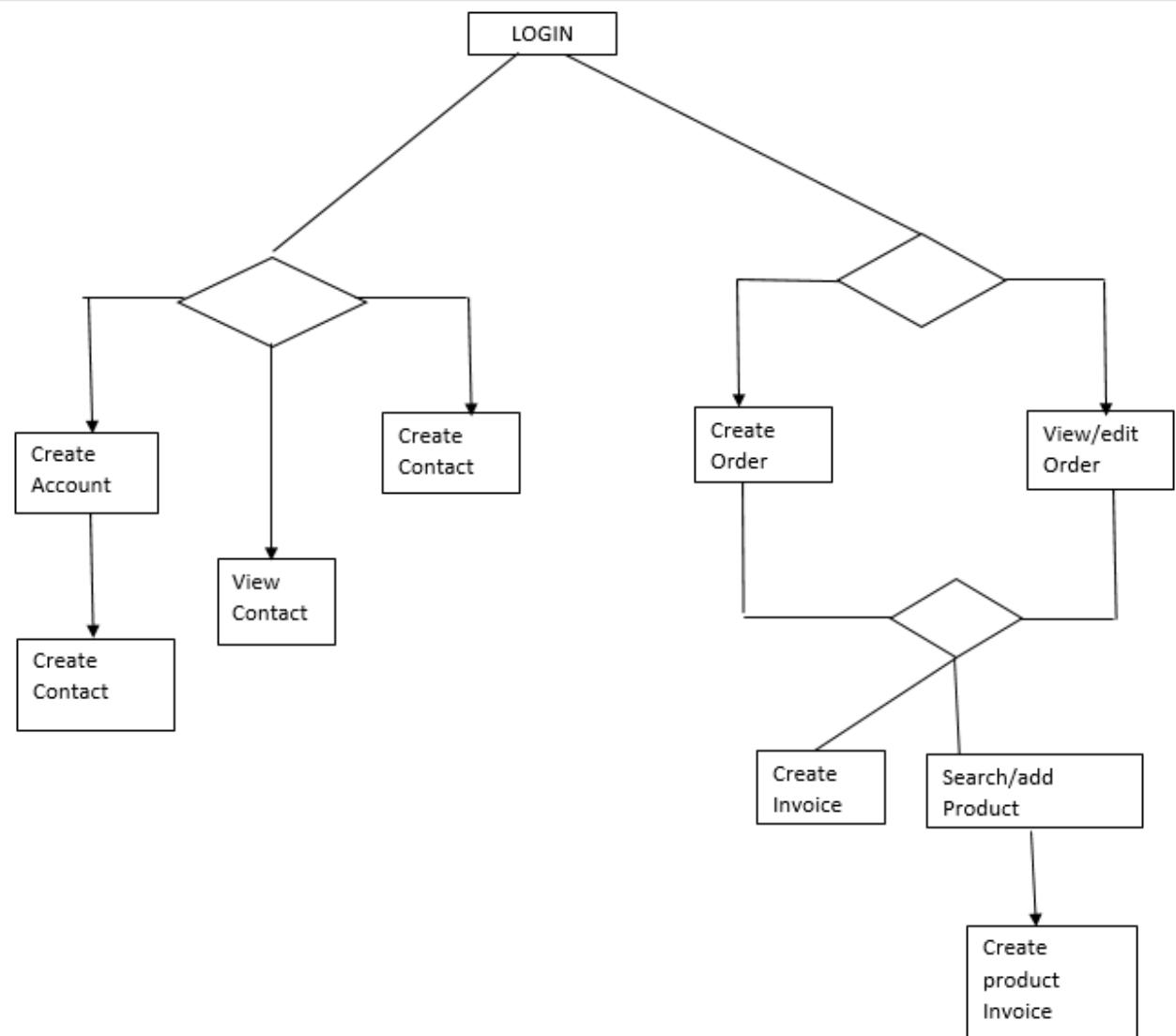
## Class Diagram:



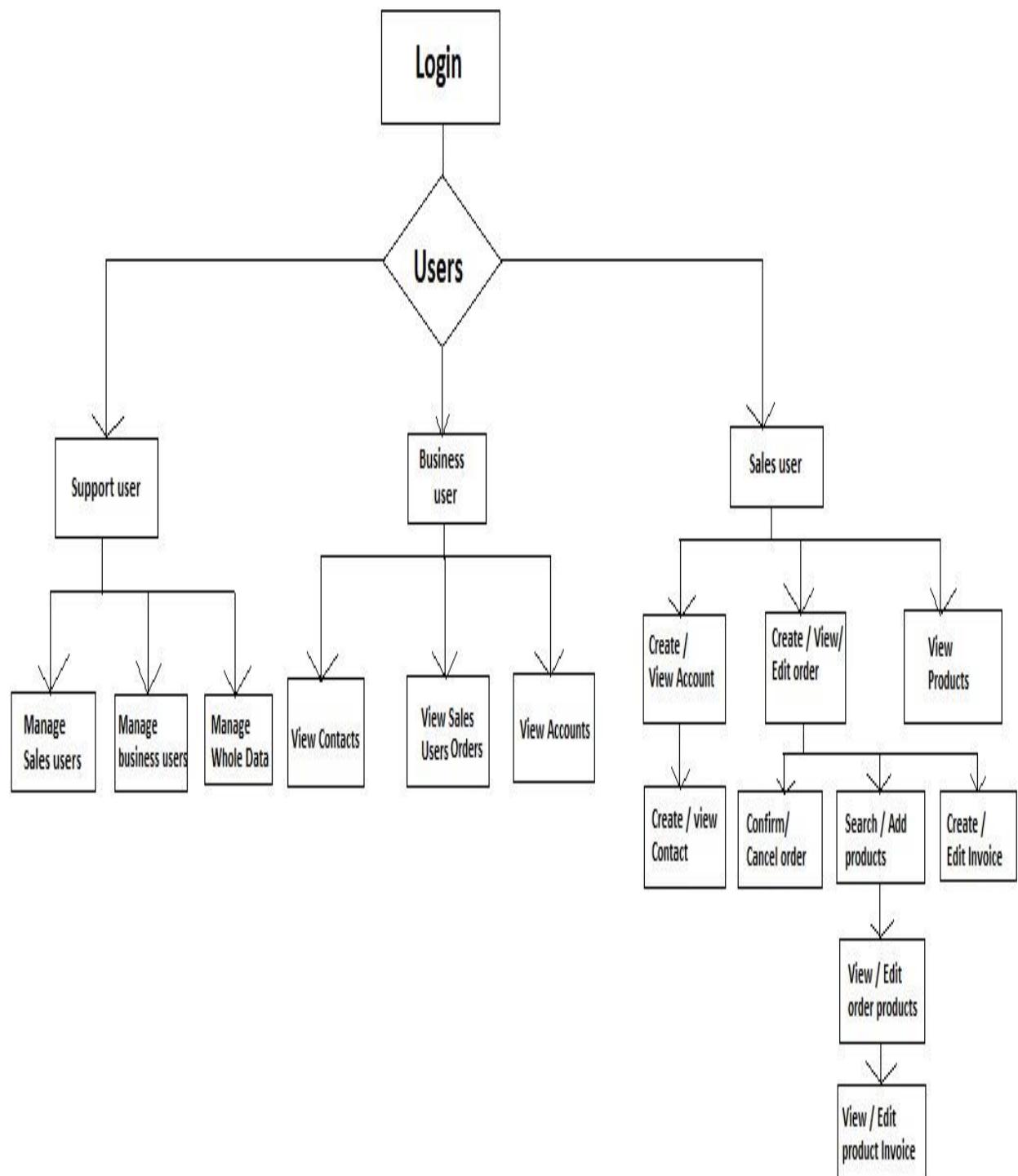
## Sequence Diagram:



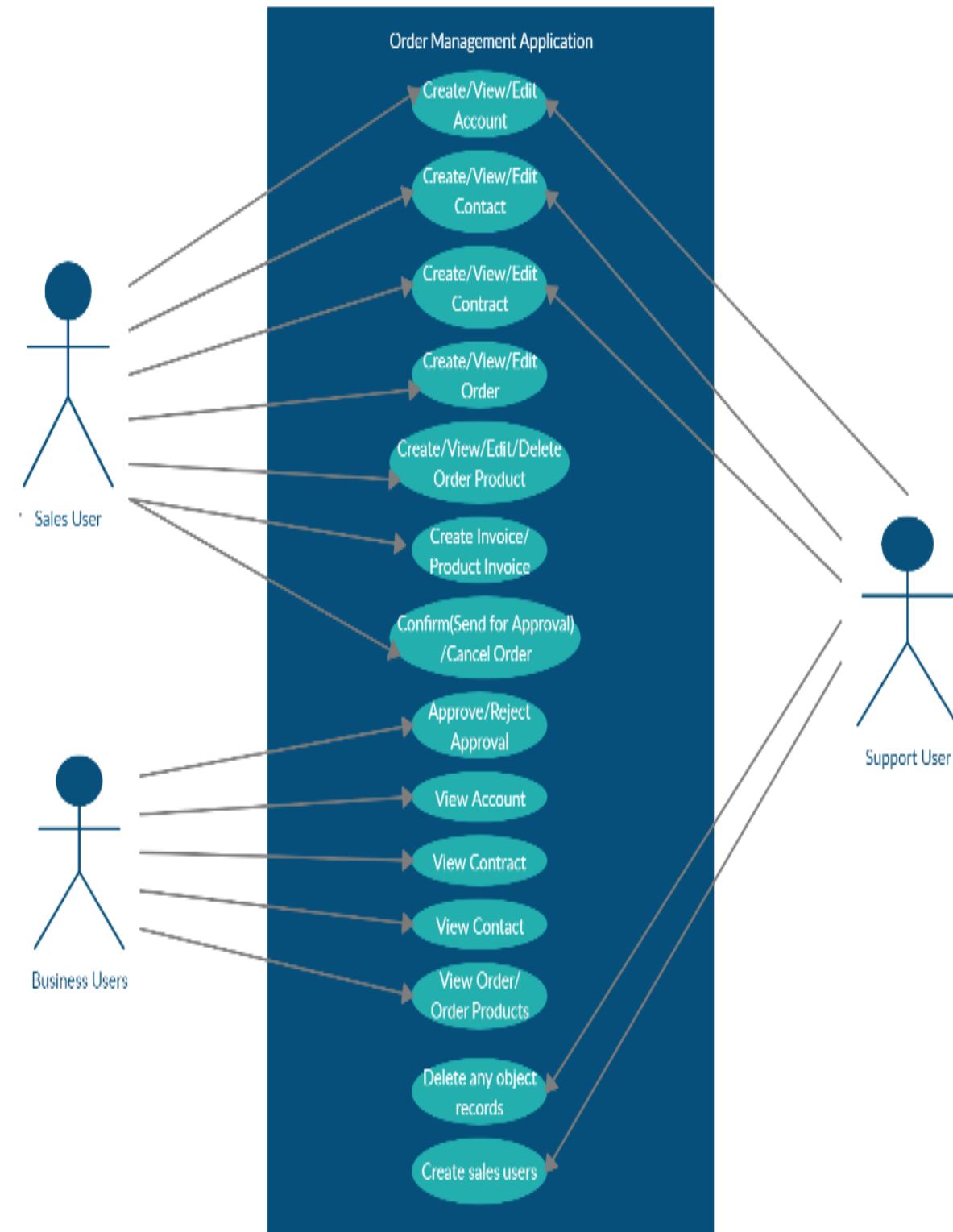
## Activity Diagram:



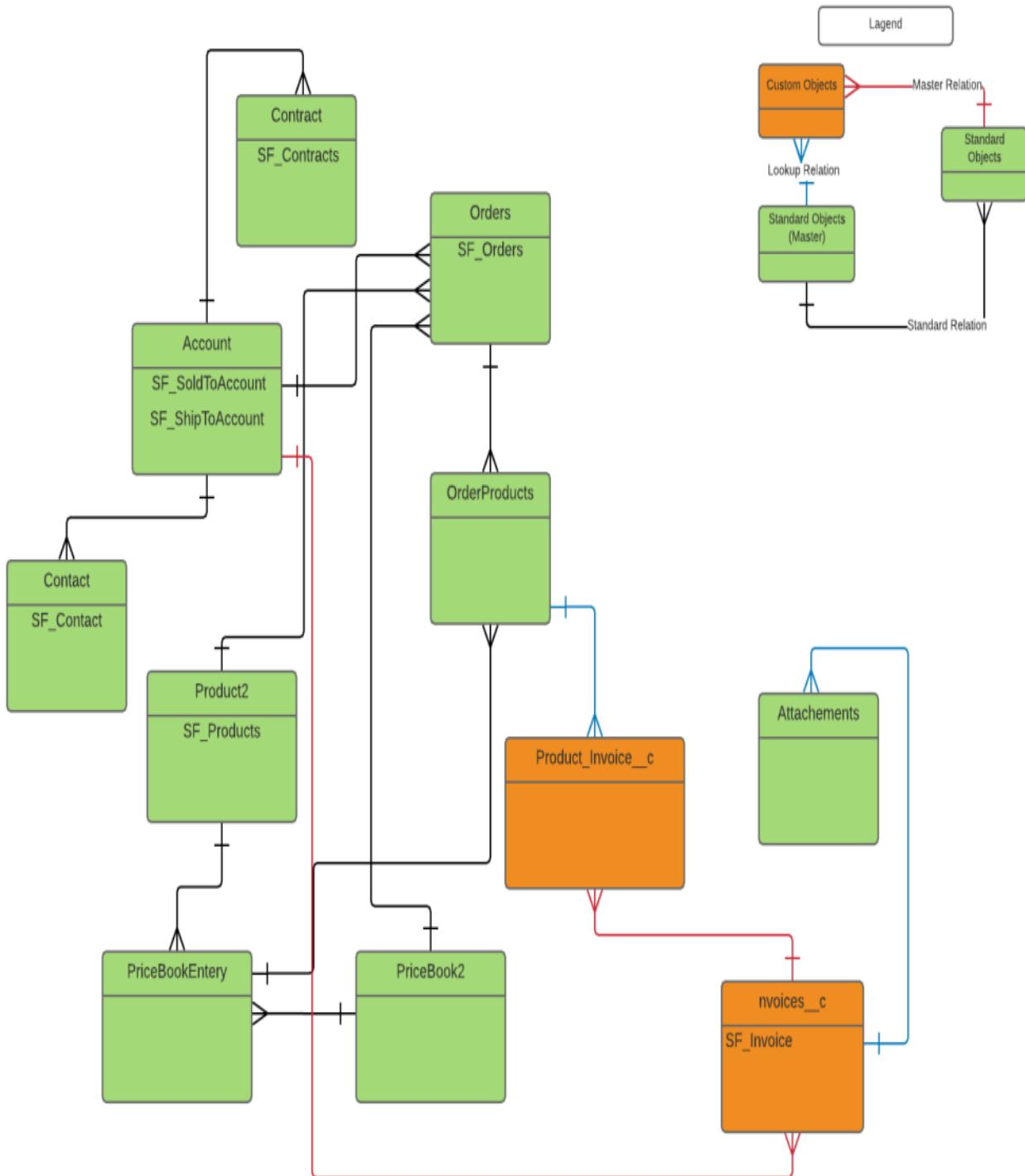
## Flow Diagram:



## Use Case Diagram:



## Entity Relationship Diagram:



## Screenshots (LWC):

The screenshot shows the 'Order: New Button Page' in a Lightning Web Component (LWC) environment. The page has a light blue header bar with the LWC logo on the left. On the right of the header are several icons: a star with a downward arrow, a plus sign, a question mark, a gear, a bell, and a user profile icon.

The main content area contains several input fields:

- Account ID:** A search bar labeled 'Search Accounts...' with a magnifying glass icon.
- \*Order Start Date:** A date input field with a calendar icon.
- Contract ID:** A search bar labeled 'Search Contracts...' with a magnifying glass icon.
- \*Status:** A dropdown menu with 'None' selected.
- Order Type:** A dropdown menu with 'None' selected.
- Shipping Street:** A large text input field.
- Shipping City:** A text input field.
- Shipping State/Province:** A text input field.
- Shipping Zip/Postal Code:** A text input field.
- Shipping Country:** A text input field.
- Billing Street:** A text input field.

Figure a Order: New Button Page

Search Orders and more..

Sales Home Orders Products Accounts Contacts Dashboards Reports Invoices Contracts

Order Number  
00000100

Account ID  
United Oil & Gas Corp.

Order Start Date  
Apr 22, 2020

Contact ID  
00000100

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 Received
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	YDNMOD	100	Mi	▼

javascript:void(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	

*Figure e Add Products*

Order ID	Total Price
<b>00000106</b>	\$324,500.00
Order Product Number	Quantity
0000000051	5.00
Start Date	Product ID
	<a href="#">Apple iPhone 11</a>
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.