**About Project (Invoice Management)**

The company TFI wants you to develop an invoice management system that will let the company manage the invoices in one place.

**Custom Objects Required for the Project**

1. Company (Account)
2. Customer (Contact)
3. Invoice
4. Invoice Line Item
5. Payment
6. Refund

**Data Model**

Diagram

Description automatically generated

Graphical user interface

Description automatically generated

**Requirements**

1. Users can create invoices under Accounts.
2. There cannot be more than 5 Active invoices at a time under Account
3. If the Amount of Invoice is Greater than $5000 it will be sent for approval to Org Admin automatically. If the invoice is rejected, then send the email to the invoice owner.
4. On the Account Record, it should display the Amount of Open Invoice, Overdue Invoice, and Paid Invoice (This must be done using Apex Trigger).
5. Users must be able to record the payment against each invoice and users cannot record a payment that is greater than the invoice amount.
6. Develop a batch apex to delete all the invoices which have been created in the last 1 year.
7. Send reminder to the customer before 3 days an invoice is due and before 1 day an invoice is due.
8. Users can not edit the invoice if the invoice is paid.
9. Users can not delete the Account record if it has related Draft Invoices. Note: - Use apex Trigger for the same.
10. In the Home page user should be able to see all the Invoice Records related to the account he/she owns in the table format. Clicking on any Invoice Number it should take the user to detail page of Invoice.
11. In the Account detail page user should be able to see all the Invoice Records related to the account the table format. Clicking on any Invoice Number it should take the user to detail page of Invoice.
12. User Can not create Invoice from the Invoice New button. User should use the Component sitting inside Account detail page.

**Override Invoice New Page**

When the user clicks on the new button for Invoice it should open a Custom Lightning Web Component which will display the custom message and message will be You can only create Invoice from Company Detail Page.

The component should also display a button and clicking on the button it will take the users to Account List View.

See the below image



**Override Invoice Detail Page**

You need to override the invoice detail page to display the detail about a single invoice inside Salesforce. This page will display the Invoice status on the top of the farm of Salesforce [Path](https://www.lightningdesignsystem.com/components/path/).

A picture containing graphical user interface

Description automatically generated

Graphical user interface

Description automatically generated with medium confidence

**Button Functionalities:**

* **Record Payment & Record Refund –** When User Clicks on any of these buttons it should open a Modal and display the fields of respective object. Create the Record and fire the LMS which will refresh the Page.
  + Note: - The Record Payment button only be visible once the Invoice is approved and have atleast one Line Item.
  + Record Refund button should be visible only when atleast one payment has been recorded.
* **Add Items –** When the button clicked it should add new line under the same table and display one more button “Save Lines”. User provides the information and then Saves the Lines.
* **Edit –** Opens the Edit Interface for Invoice
* **Clone –** Clones the Selected Invoice
* **Delete –** Deletes the Selected Invoice
* **Void –** Update the status of the Invoice to Voided

**Note: -**

1. While Recording the Payment the Amount cannot be greater than the Invoice total Amount.
2. User Can only record refund if there is a payment record and the Refund Date should always be greater than Payment Record.
3. When a Payment is Recorded Update the Payment Date on the Invoice Object with the Current Date.
4. You can not Add Lines once the Invoice id Paid
5. You can only Record Payment once the Invoice is Approved
6. You can not Edit Invoice is the Invoice is Pending

**Invoice Create Page:** -

On the Account Page there should be a button **“Manage Invoice”** and Clicking on the button it should open the Invoice Create Component. For more information see below images.

Graphical user interface, text, application

Description automatically generated

Graphical user interface, application

Description automatically generated

**Save Draft Invoice –** When user click on the button it should check of all the required fields and if the values are there then Create the invoice under the same company and for the selected customer. Also, display the toast information.

If user does not select any customer and try to save the invoice, then it should display a message.

Graphical user interface, application

Description automatically generated

**Add More Items: -** When user click on the button it should add one more item and display in the same table

**Save Line Items: -** Clicking on this button should perform below tasks

1. If invoice is not created show message that “Please save Invoice First”
2. Should check that all the required are populated properly
3. Should Create all the invoice line items and display the success notifications

**Note: -** The invoice line items table must have an additional column which will have a delete icon and clicking on that icon it should remove that specific line from the table and from the list as well.

**Invoice List Component: -**

Invoice List component will be sitting on the two places.

1. **Home Page –** When Component is inside home page then it should display all the invoice for the logged owner. So, if the User owns 10 Accounts and those 10 Accounts have 100 Invoices then display the list of 100 invoices.
2. **Account Record Page –** When the Invoice is being used inside the Account Record page then it should only be displaying the information about related invoices.

Graphical user interface, application

Description automatically generated

**Row Level Action –**

The Invoice List Component should have 2 row level actions

1. **Show Details –** When clicked on the button it should take the user to invoice details.
2. **Delete –** When use clicks on the button it should delete the invoice from the database.