

ORDER MANAGEMENT USING SALESFORCE

PREPARED FOR

SFDC Training Program
Capgemini

PREPARED BY

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Abstract

The order management system is a Salesforce app and environment meant to facilitate the creation and approval of orders generated by a firm's clients. The firm's order handling team comprises employees in sales, business and support roles. The system is meant to handle how an employee interacts with and handles order and client data, while overriding the standard sales cloud utility with customizable lightning web components.

Scope

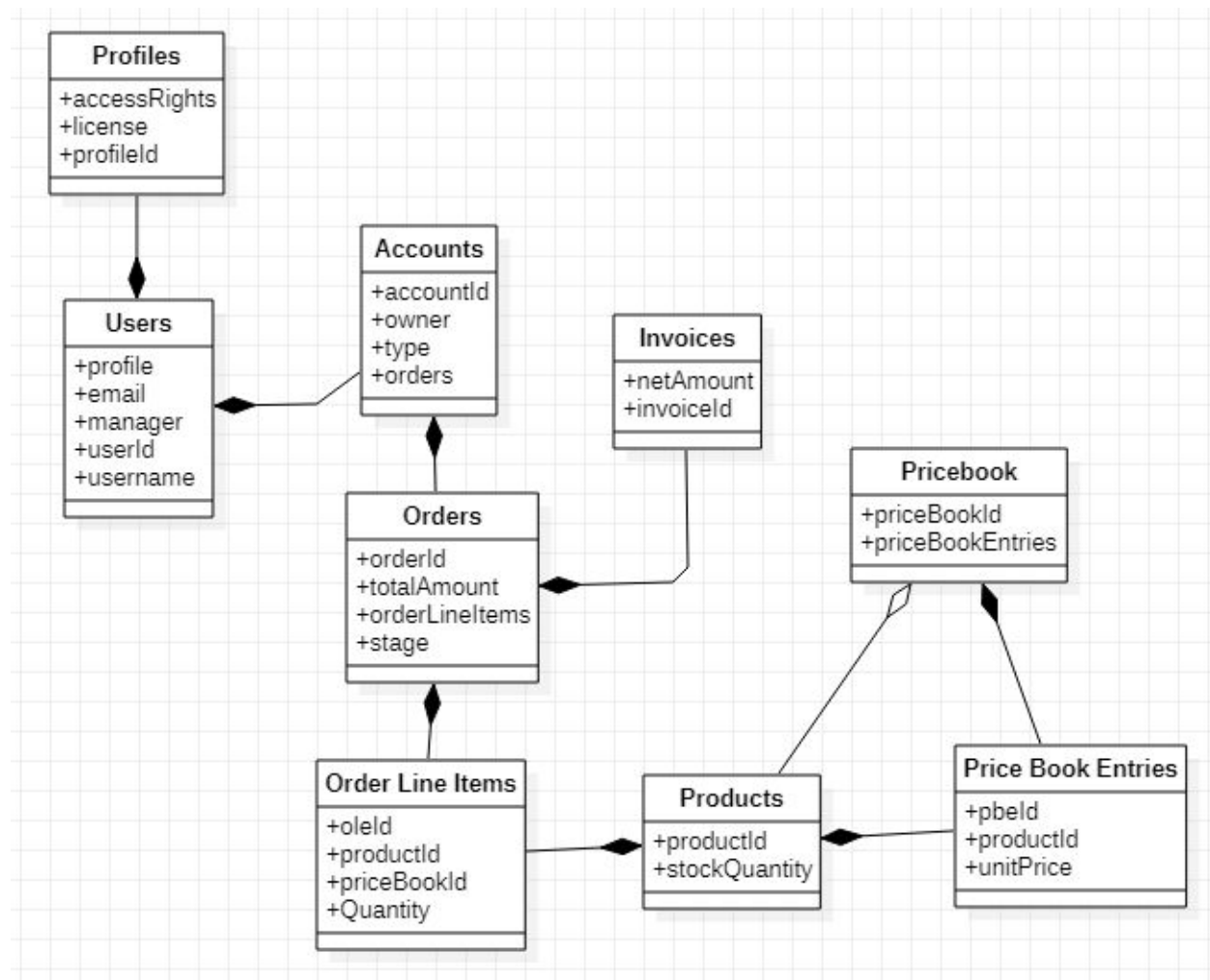
Inscope

1. Support user, Business User and Sales User were given their own specific functionality as per the use case.
2. Order approval was automated.
3. Triggers were used to apply business logic.
4. Lightning Web Components used to create app home page and override actions(wrapped in aura component).

Outscope

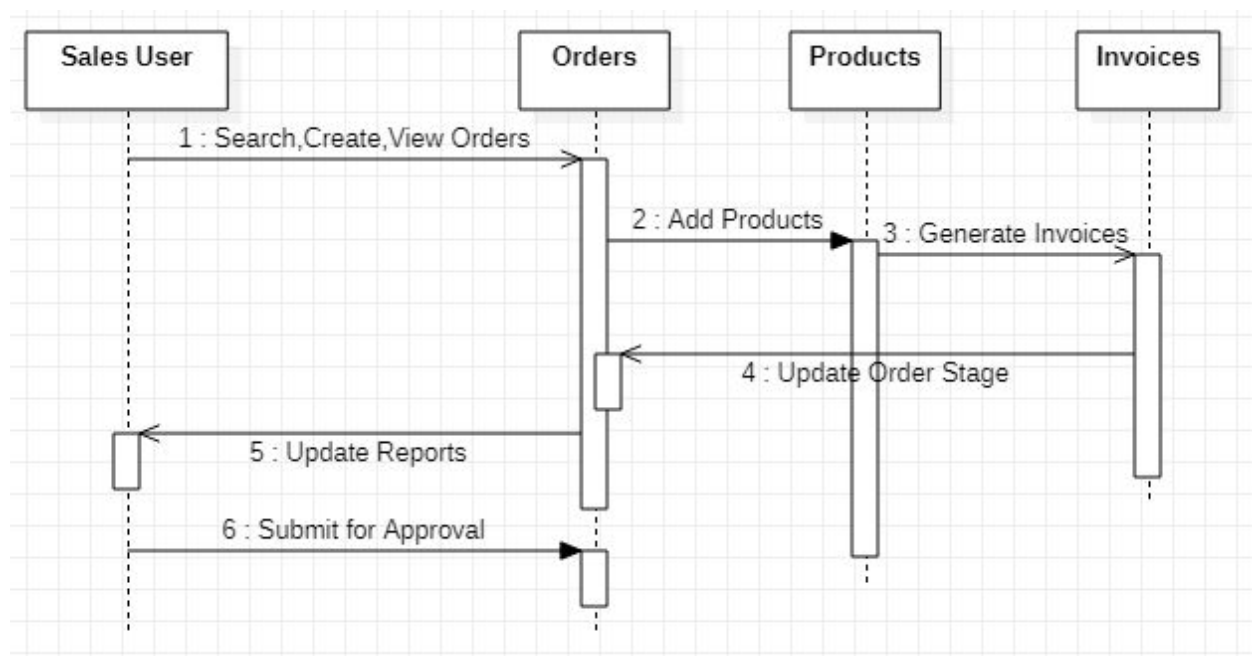
1. Ensuring code coverage using test classes, to prepare for deployment was not done.
2. Batch apex jobs which could remove empty orders at a timely basis.
3. Limited salesforce license reduced number of users.

Class Diagram

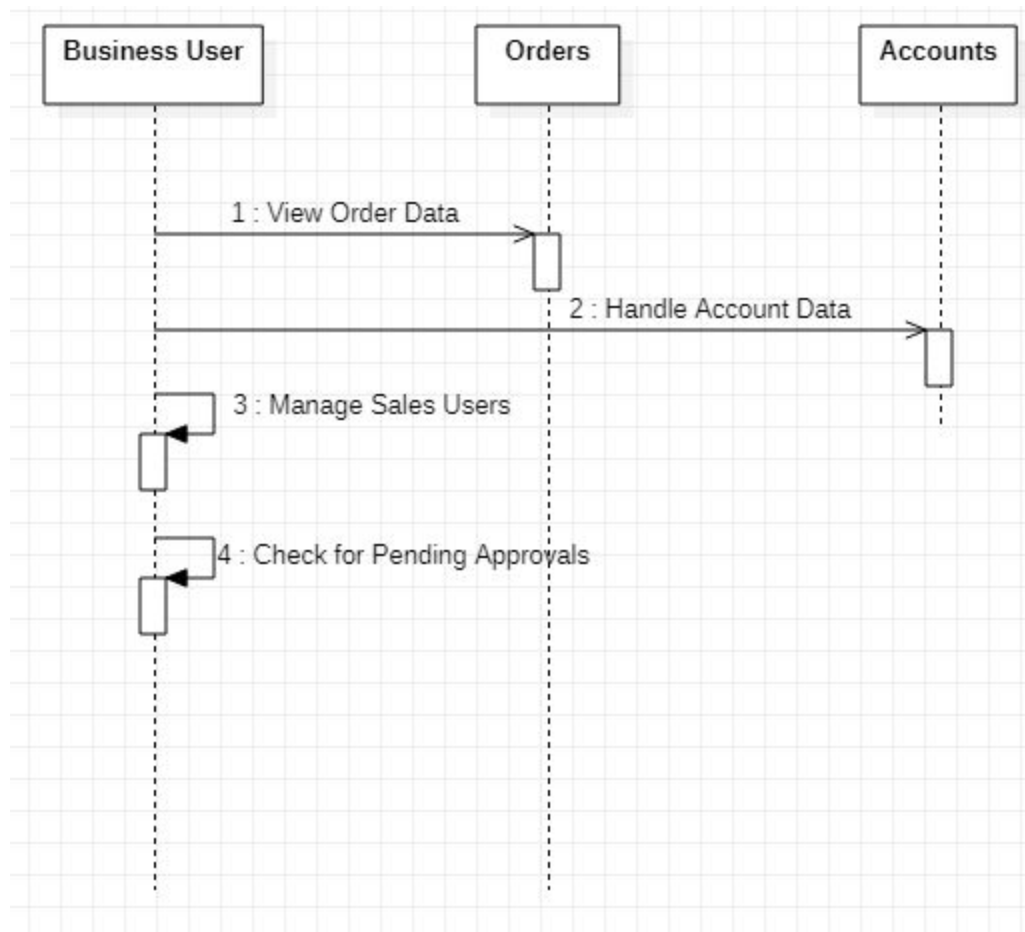


Sequence Diagrams

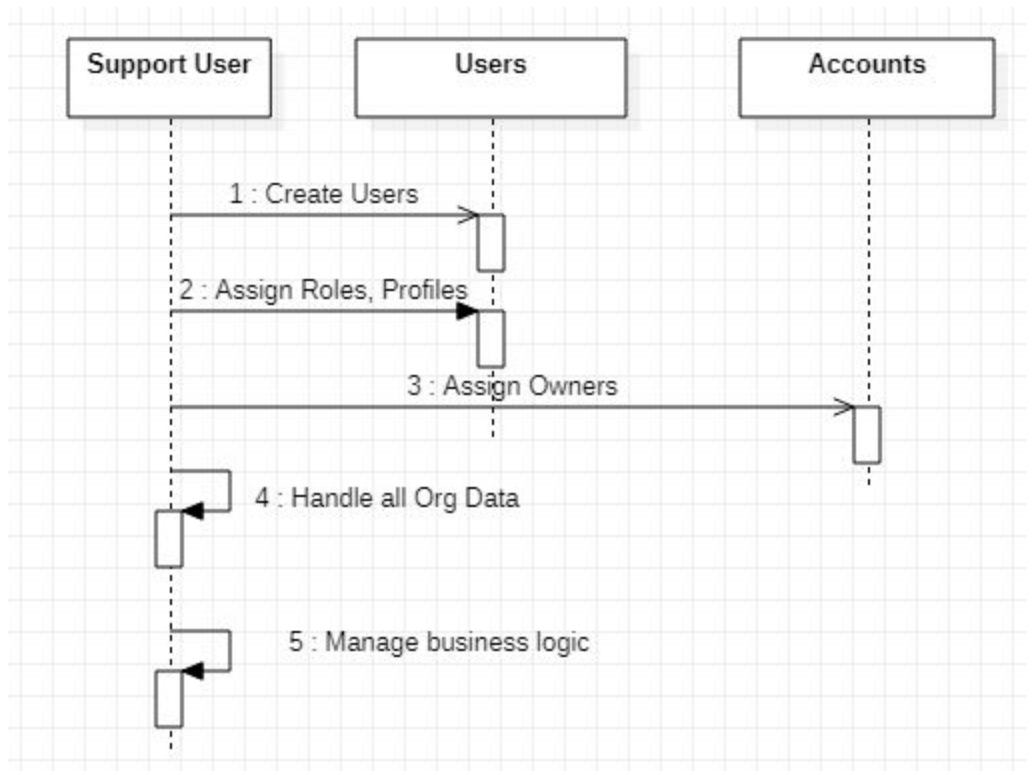
1. For Sales User:



2. For Business User:

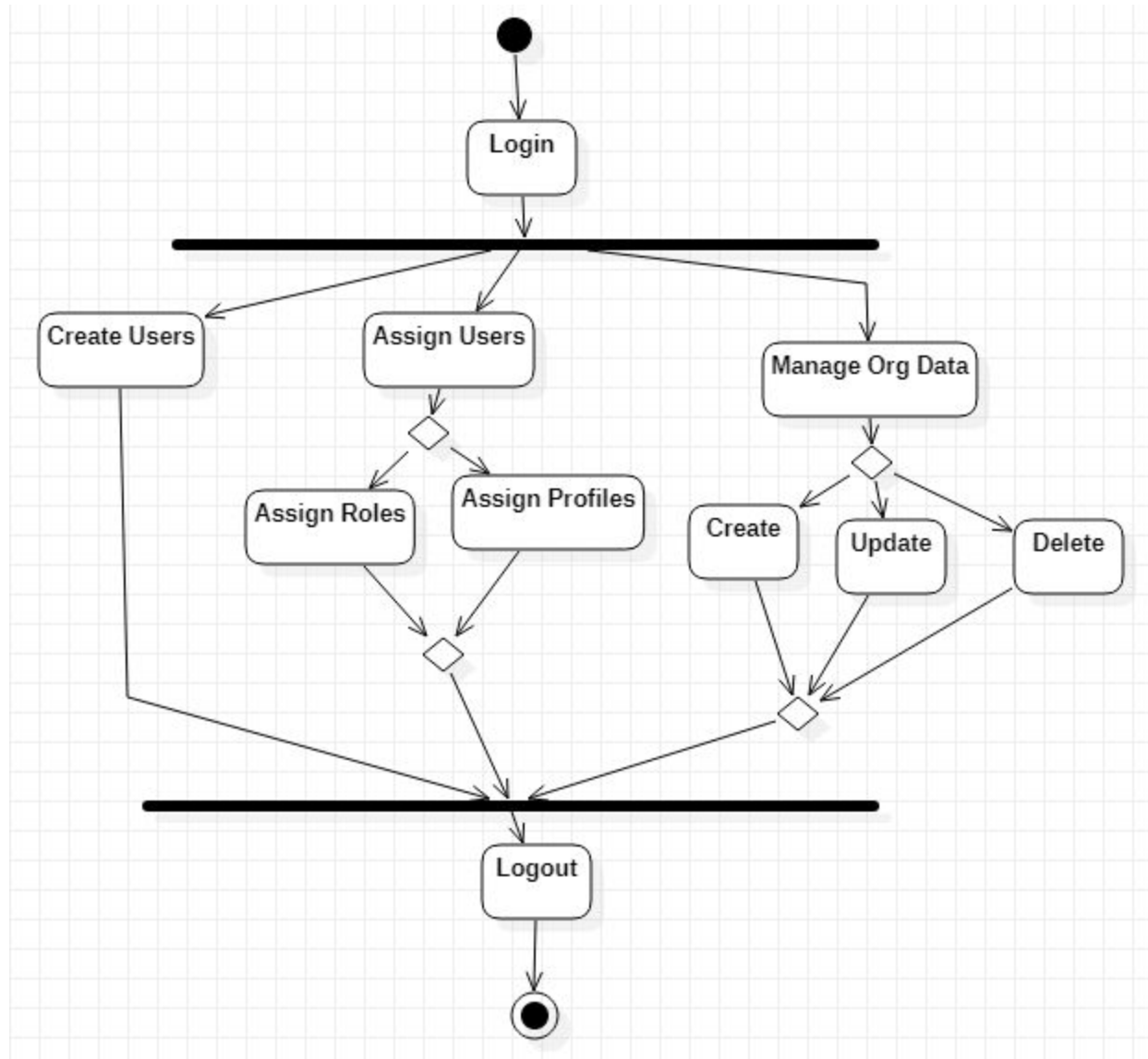


3. For Support User:

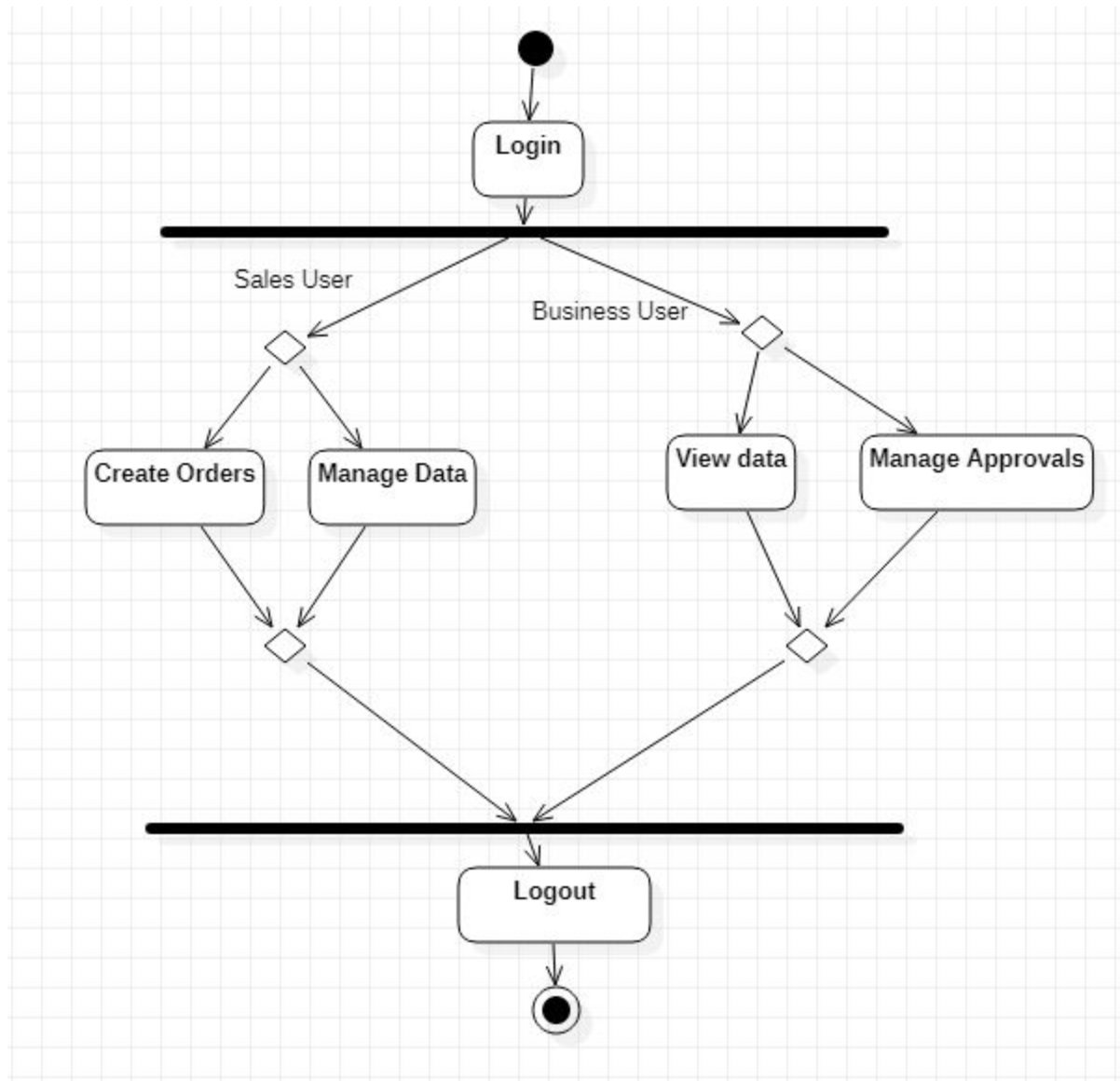


Activity Diagram

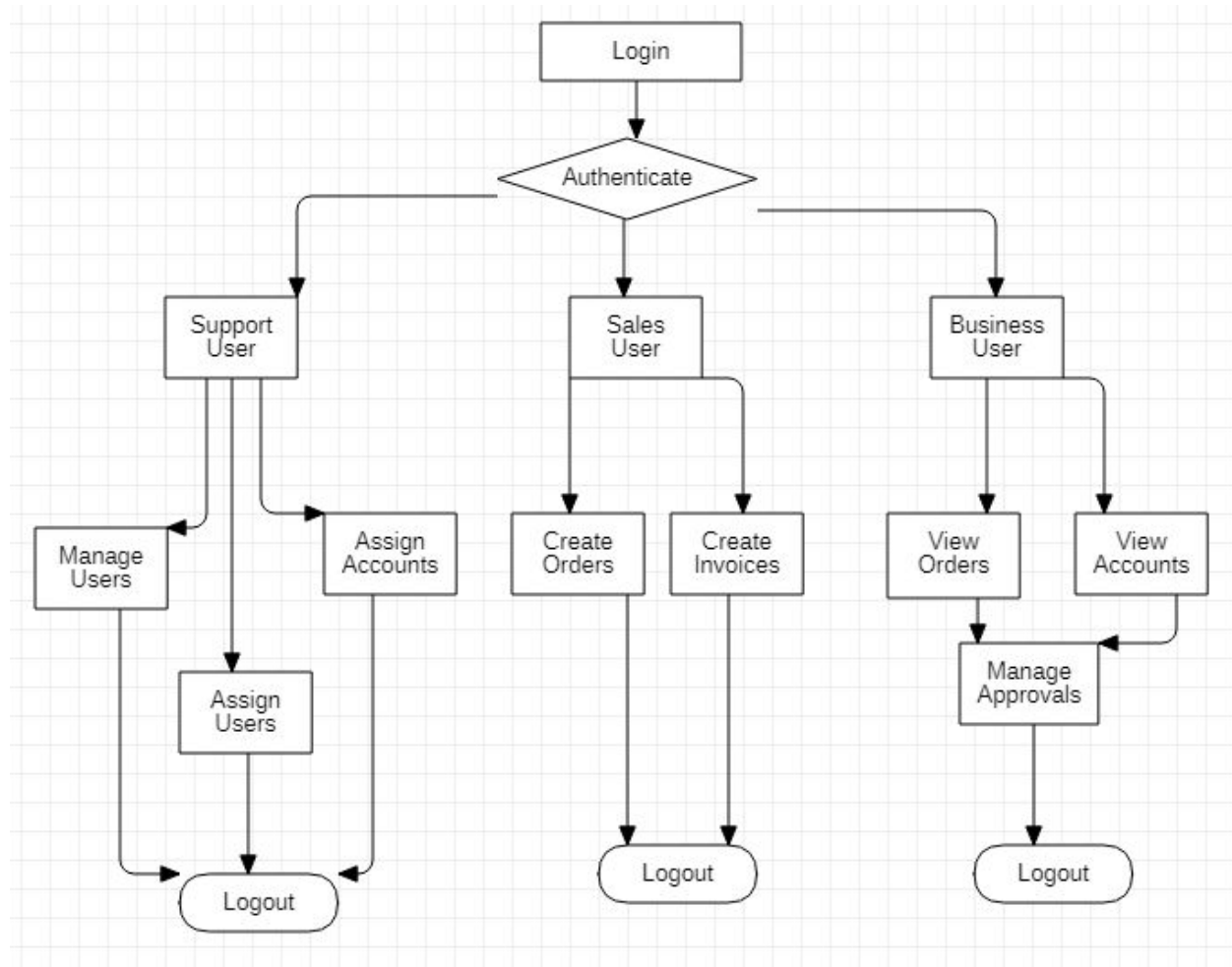
1. For Support User:



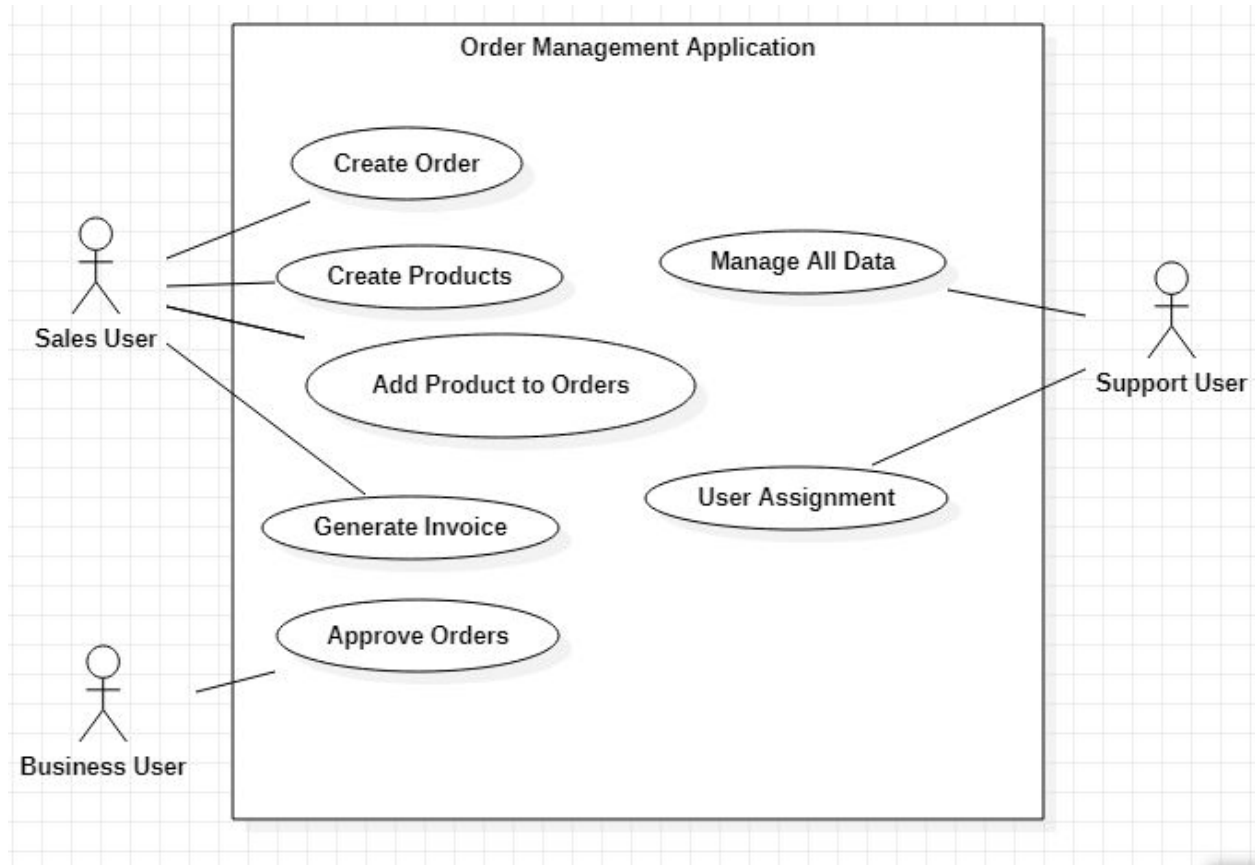
2. For Sales/Business User:



Flowchart

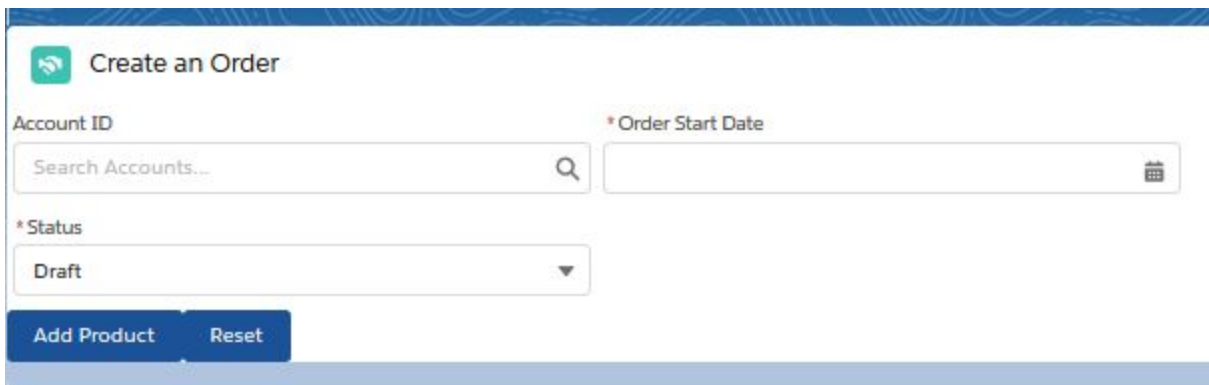


Use Case Diagram



Wireframes

Order Creation



The 'Create an Order' form is located within a blue header bar. It features a title 'Create an Order' with a green icon. Below the title, there are two input fields: 'Account ID' with a search icon and 'Order Start Date' with a calendar icon. A third field, '* Status', is a dropdown menu currently set to 'Draft'. At the bottom, there are two buttons: 'Add Product' and 'Reset'.

Create an Order

Account ID

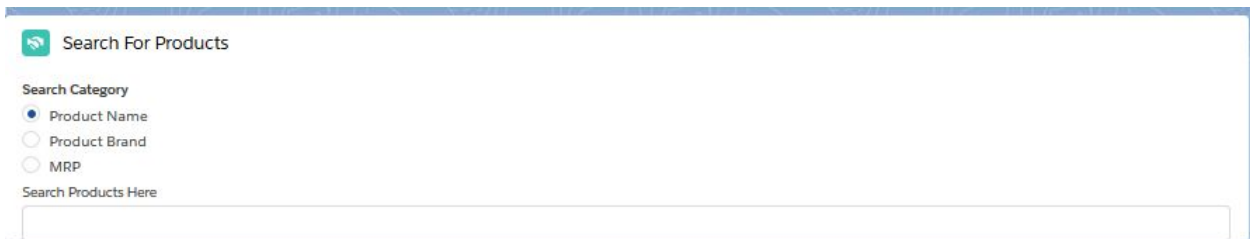
* Order Start Date

* Status

Draft

Add Product Reset

Search Products



The 'Search For Products' form is located within a blue header bar. It features a title 'Search For Products' with a green icon. Below the title, there are three radio buttons for 'Search Category': 'Product Name' (selected), 'Product Brand', and 'MRP'. Below these is a text input field labeled 'Search Products Here'.

Search For Products


Search Category

☒ Product Name

☐ Product Brand

☐ MRP

Search Products Here


Search For Products

Search Category
☒ Product Name
☐ Product Brand
☐ MRP

Search Products Here

Product Code	Product Name	Brand	MRP	In Stock	Action
null	Phillps A2	Phillps	null	12	<button>Add Item</button>
PA1	Phillps A1	Phillps	1000.00	28	<button>Add Item</button>
GC3040	GenWatt Propane 500kW	null	50000.00	null	<button>Add Item</button>
SL9080	SLA: Platinum	null	40000.00	null	<button>Add Item</button>
GC3020	GenWatt Propane 100kW	null	15000.00	null	<button>Add Item</button>
GC3060	GenWatt Propane 1500kW	null	120000.00	null	<button>Add Item</button>
IN7020	Installation: Portable	null	5000.00	null	<button>Add Item</button>

Add/Remove Products

Selected Products List

Product Code	Product Name	Brand	Stock Quantity	Quantity	Discount(%)	Action
PA1	Phillps A1	Phillps	28	<input type="text" value="4"/>	<input type="text" value="0"/>	<button>Remove</button>

Confirm Order

Cancel Order

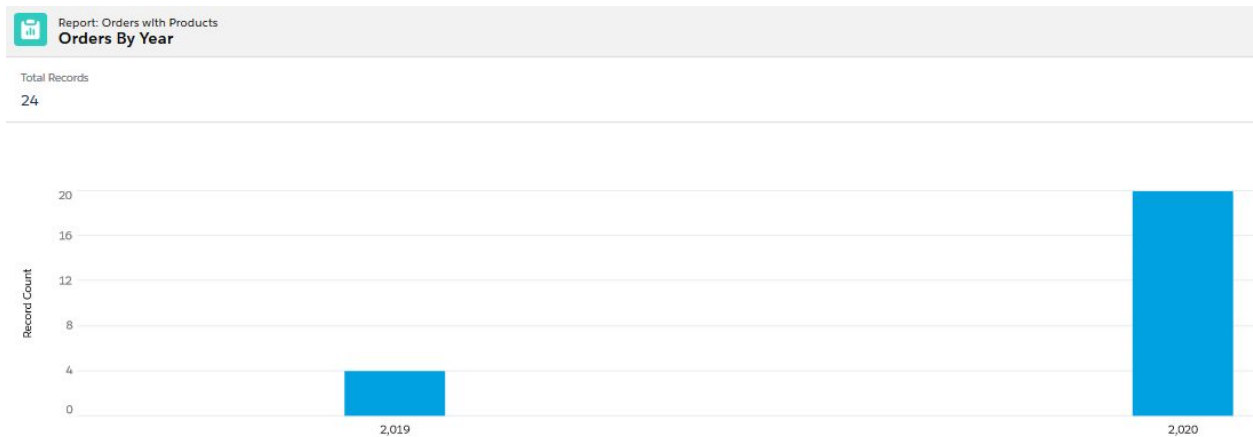
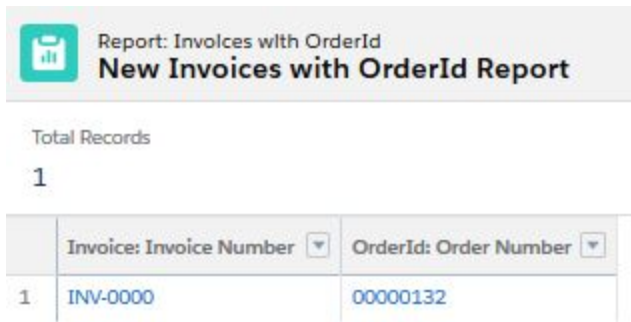
Order Summary

×

Order Details:
 Order ID: 8012w000000Cn5mAAC Order Amount : 11000 Total Order Quantity : 11

Product Details:
 Product Name : Philips A1 Product Brand : Philips Stock Quantity : 944 Quantity : 11

Reports



Approval Process

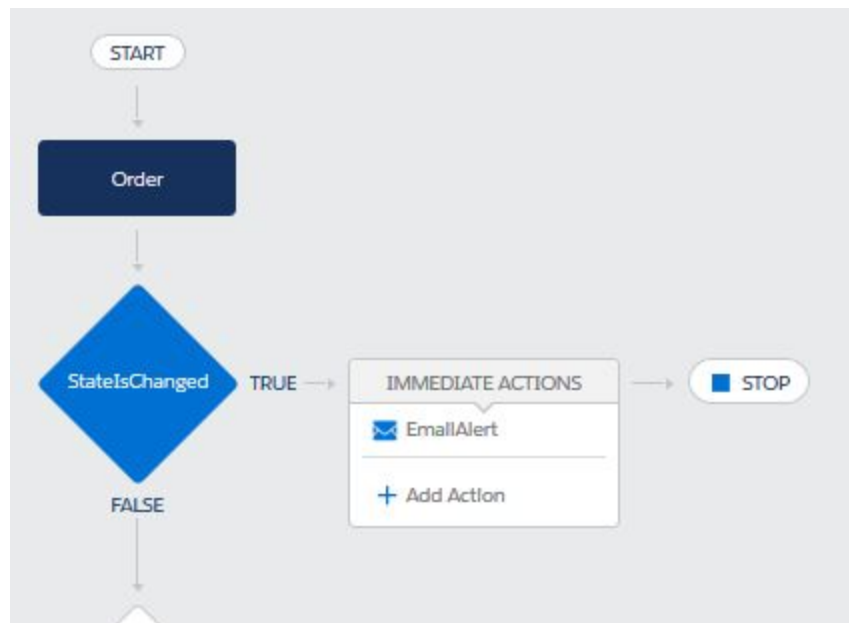
Process Definition Detail			Edit Clone Deactivate	
Process Name	Order Approval Process		Active	<input checked="" type="checkbox"/>
Unique Name	Order_Approval_Proocess2		Next Automated Approver Determined By	Manager of Record Submitter
Description				
Entry Criteria	Order: isApproved EQUALS False			
Record Editability	Administrator ONLY		Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	Order Approval			
Initial Submitters	Role: Sales User Role			
Created By	Priyam Dutta , 4/28/2020, 8:46 AM		Modified By	Priyam Dutta , 4/28/2020, 8:46 AM

Approval Steps ¹						
Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Order Less Than 100k		Order: Order Amount GREATER OR EQUAL 100000 , else Approve	Manager	Final Rejection

Final Approval Actions ¹			Add Existing Add New ▼
Action	Type	Description	
Edit Remove	Record Lock	Lock the record from being edited	
Edit Remove	Field Update	StatusChange	
Edit Remove	Field Update	isApprovedChange	
Edit Remove	Field Update	OrderStageChange	

Final Rejection Actions ¹			Add Existing Add New ▼
Action	Type	Description	
Edit Remove	Record Lock	Unlock the record for editing	
Edit Remove	Field Update	OrderStageChange2	

Process



Classes and Constituents

Users

Contains data such as EmailId, UserId, Password, Username and utility controls such as profiles, roles, managers and licenses, which is then used to configure sharing of data and utility.

Accounts

Contains data of the Clients such as their Contact information, related deals and trade.

Orders

Contains order details to record client order data and facilitate order handling.

Invoices

It has payment data and progression details for an order.

Pricebooks

Contains price lists and products

Products

Contains product details and stock details

Components

Lightning Web Components

Lightning Web Components were used to:

1. Creating an Order, using the lightning-record-edit-data form
2. Searching Products, using a Controller and an Apex imperative call
3. Adding Order Line Items, using a Controller and an Apex imperative call
4. Generating the Order Summary
5. Overriding the new Order button on the Order home page, using a lightning Aura Component which calls a lightning web component.

Apex Triggers

1. Trigger on User Object:
Used to restrict the manager of a sales user to a business user. Also checks and restrains the number of accounts managed by a user based on profile.
2. Trigger on Account Object:
Sets email opt out for an account's contacts
3. Trigger on Order Object:
Used to control reversion of order stage
4. Trigger on OrderItem Object:
Used to maintain stock quantity and update it
5. Trigger on Invoice Object:
Used to update Order stage upon invoice generation

Approval Processes

1. Order Approval Process:

The order approval process works by directly approving orders having amount under 100,000 dollars, and requiring a manager's approval for orders above that.