Declarative App Building

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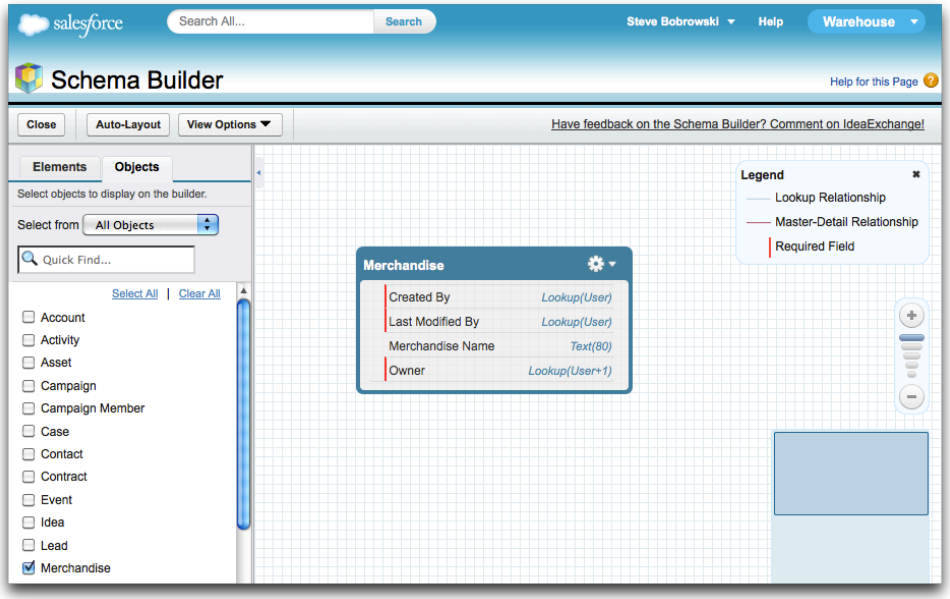
Create a data model for a warehouse application which can be easily extended with business logic for internal and external applications



Declarative App Building

Allows for the creation of data models and business logic without adding programmatic logic

- Custom Objects
- Custom Fields
- Validation Rules
- Workflows
- Approvals

Create a data model for a warehouse application which can be easily extended with business logic for internal and external applications

Warehouse Application Requirements

- To have a system which allows tracking of price, and inventory on hand for all merchandise
- To have a system which allows the creation of invoices containing one more merchandise items as a line item on the invoice
- To have an invoice which presents total invoice amount and current shipping status

What are the nouns in our requirements?

Warehouse Application Requirements

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- To have a system which allows the creation of invoices containing *one more merchandise items* as a line item on the invoice
- To have an invoice which presents total invoice amount and current shipping status

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SOFTWARE

Warehouse Application Requirements

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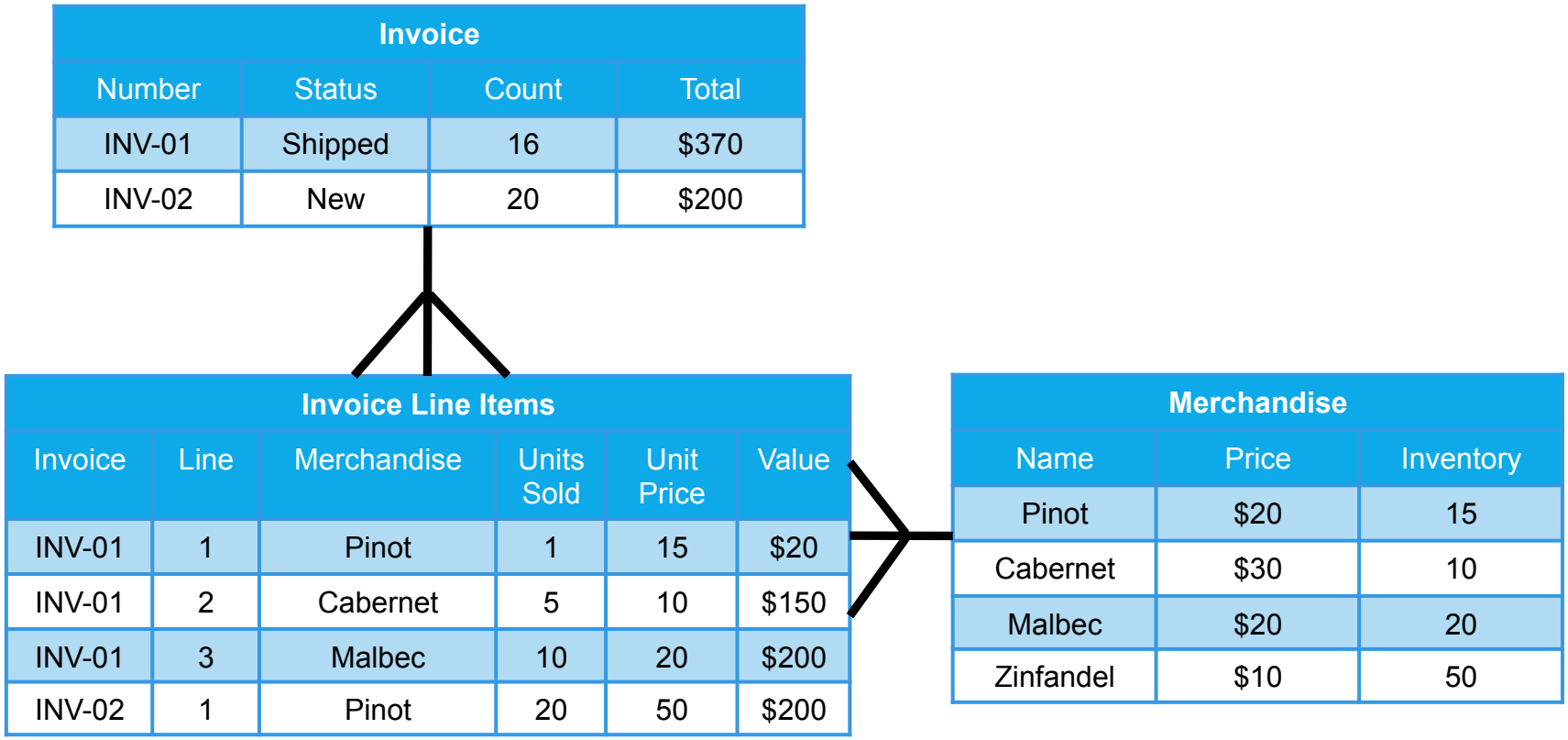
Warehouse App Data Model



Invoice

Number	Status	Count	Total
INV-01	Shipped	16	$370
INV-02	New	20	$200

Invoice Line Items

Invoice	Line	Merchandise	Units Sold	Unit Price	Value
INV-01	1	Pinot	1	15	$20
INV-01	2	Cabernet	5	10	$150
INV-01	3	Malbec	10	20	$200
INV-02	1	Pinot	20	50	$200

Merchandise

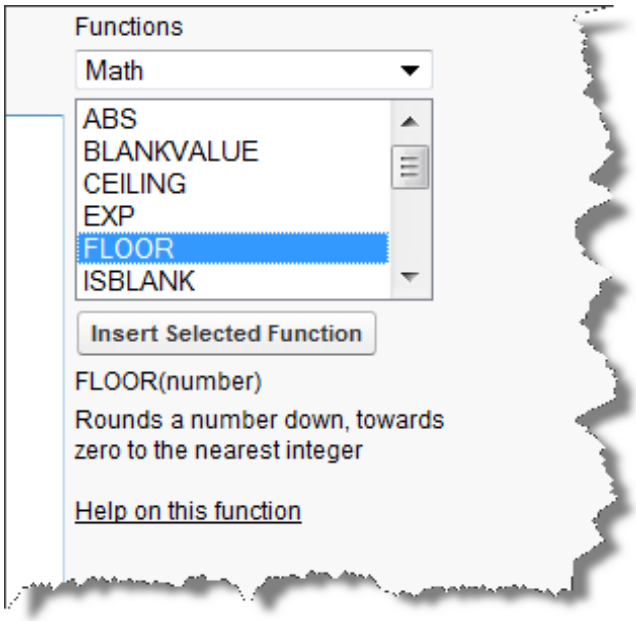
Name	Price	Inventory
Pinot	$20	15
Cabernet	$30	10
Malbec	$20	20
Zinfandel	$10	50

Create a data model for a warehouse application **which can be easily extended with business logic** for internal and external applications

Functions in Formulas

- ‘Pre-packaged’ operations for performing common logic

- Support for commons functions
  - Math
  - Text
  - Date & Time
  - Logical



- Can chain functions together

```
AND (   OR (
        ISPICKVAL(StageName, "Closed Won"),
        ISPICKVAL(StageName, "Negotiation/Review")),
        ISBLANK(Delivery_Date__c) )
```

Formulas can to define business logic

Validation rules

Workflow rules

Approvals

New Requirement:

- A user can not buy more items than are in stock

Look for assertions.

If

Implied on record save.

Then

Formula evals true (error) or false (save)

Error

Return error message (UI or API)

New requirement:

When

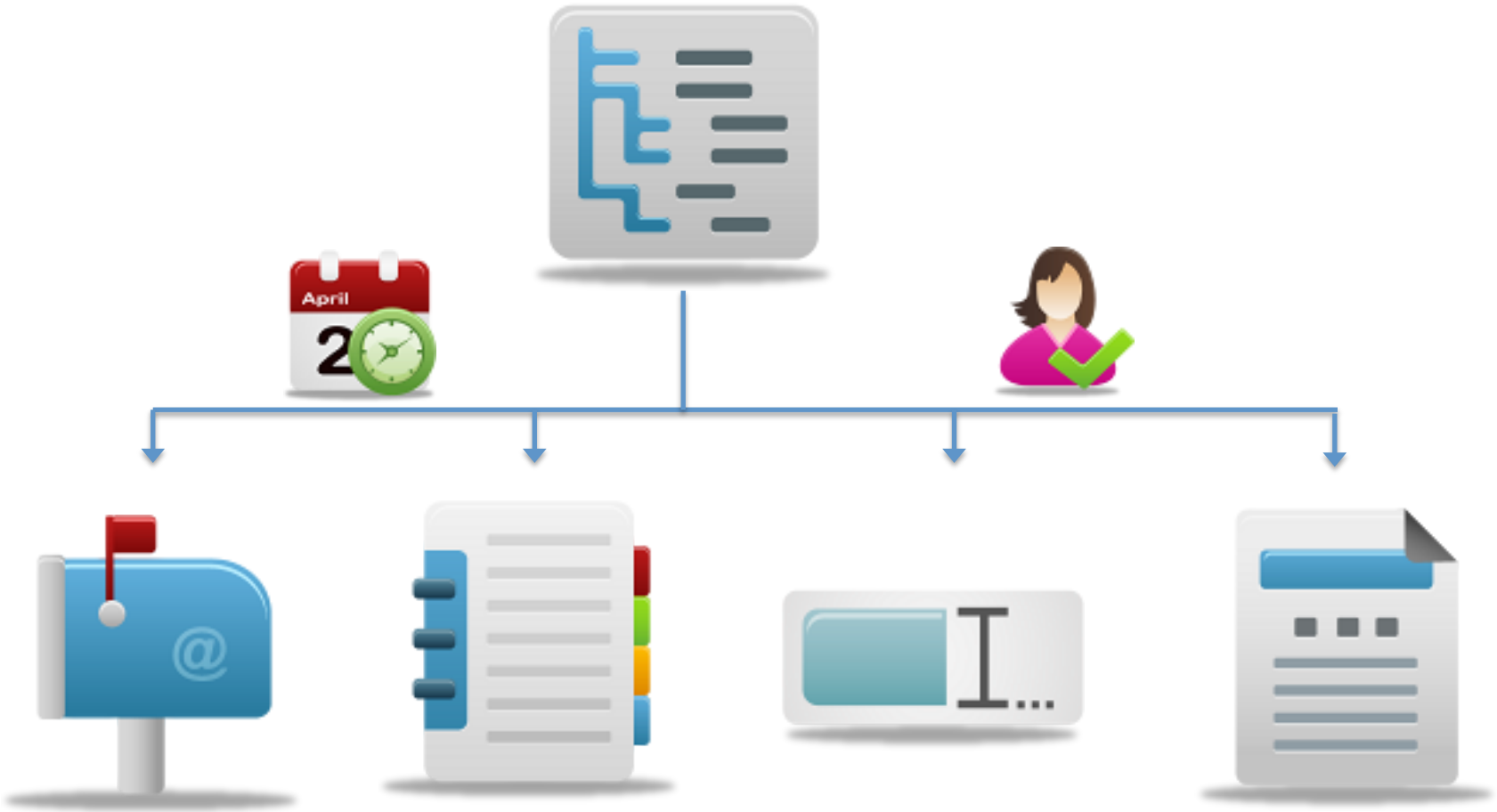
Why

- Every time a line item is added to an open invoice we need to update inventory stock counts.

What

Look for time-based queues.

Workflow & Approvals

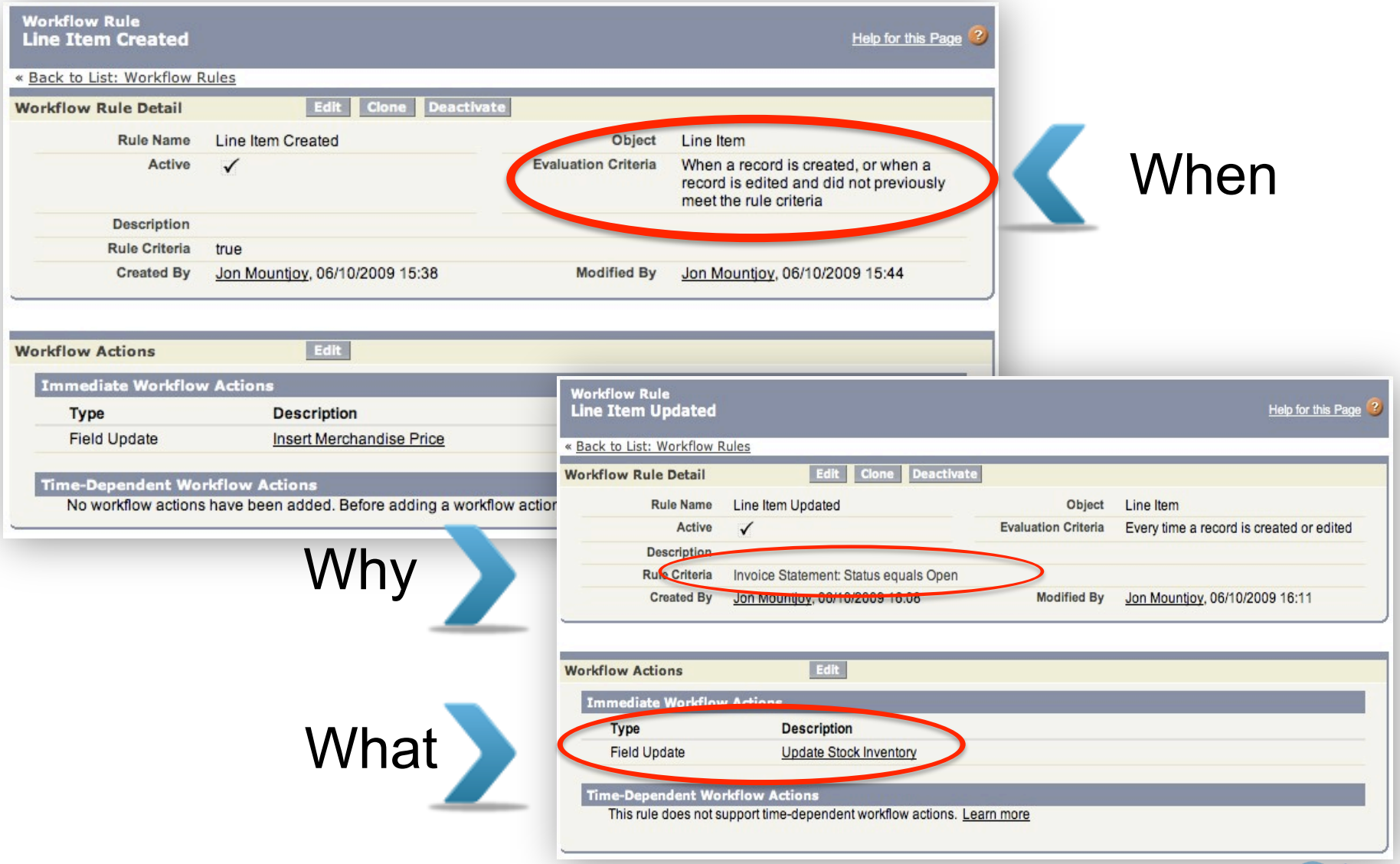


Email

Task

Update Field

Outbound Message


Workflow Rule
Line Item Created
Help for this Page
« Back to List: Workflow Rules
Workflow Rule Detail
Edit
Clone
Deactivate
Rule Name
Line Item Created
Active
Description
Rule Criteria
true
Created By
Jon Mountjoy, 06/10/2009 15:38
Object
Line Item
Evaluation Criteria
When a record is created, or when a record is edited and did not previously meet the rule criteria
Modified By
Jon Mountjoy, 06/10/2009 15:44
When
Workflow Actions
Edit
Immediate Workflow Actions
Type
Description
Field Update
Insert Merchandise Price
Time-Dependent Workflow Actions
No workflow actions have been added. Before adding a workflow actior
Why
Workflow Rule
Line Item Updated
Help for this Page
« Back to List: Workflow Rules
Workflow Rule Detail
Edit
Clone
Deactivate
Rule Name
Line Item Updated
Active
Description
Rule Criteria
Invoice Statement: Status equals Open
Created By
Jon Mountjoy, 06/10/2009 16:06
Object
Line Item
Evaluation Criteria
Every time a record is created or edited
Modified By
Jon Mountjoy, 06/10/2009 16:11
Workflow Actions
Edit
Immediate Workflow Actions
Type
Description
Field Update
Update Stock Inventory
Time-Dependent Workflow Actions
This rule does not support time-dependent workflow actions. Learn more
What

New Requirement:

- Every time an order greater than $1000 is placed a manager needs to sign off on it.

Human (role) interaction

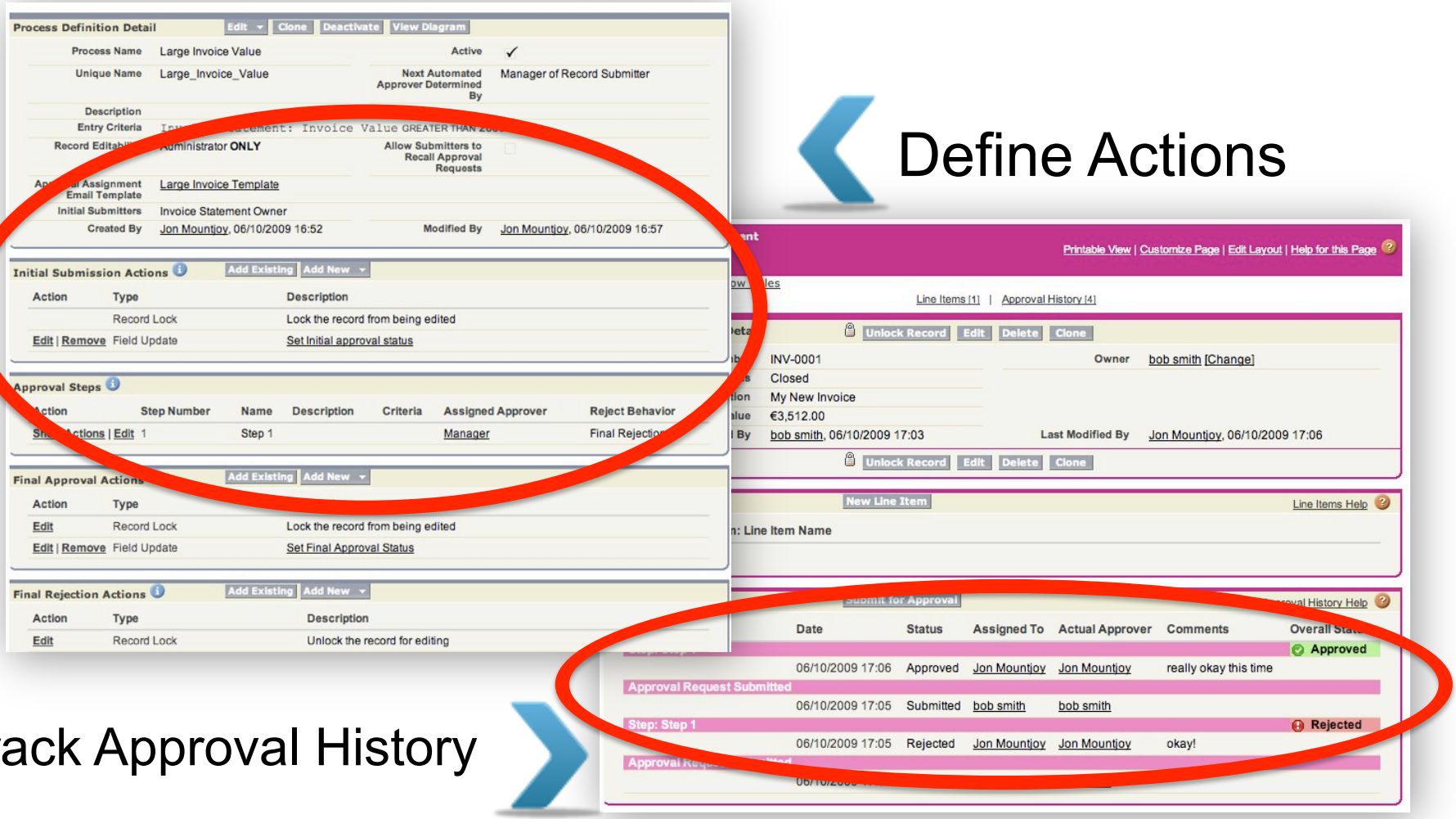
Approvals allow

Single/Multi/Skip step processes

Route based on roles, or queues

Approval via emails

Automation of manual processes


Process Definition Detail
Edit
Clone
Deactivate
View Diagram
Process Name
Large Invoice Value
Active
Unique Name
Large_Invoice_Value
Next Automated Approver Determined By
Manager of Record Submitter
Description
Entry Criteria
Record Editability
Administrator ONLY
Allow Submitters to Recall Approval Requests
Approval Assignment Email Template
Large Invoice Template
Initial Submitters
Invoice Statement Owner
Created By
Jon Mountjoy, 06/10/2009 16:52
Modified By
Jon Mountjoy, 06/10/2009 16:57
Initial Submission Actions
Add Existing
Add New
Action
Type
Description
Record Lock
Lock the record from being edited
Edit | Remove
Field Update
Set Initial approval status
Approval Steps
Action
Step Number
Name
Description
Criteria
Assigned Approver
Reject Behavior
Edit
1
Step 1
Manager
Final Approval Actions
Add Existing
Add New
Action
Type
Edit
Record Lock
Lock the record from being edited
Edit | Remove
Field Update
Set Final Approval Status
Final Rejection Actions
Add Existing
Add New
Action
Type
Description
Edit
Record Lock
Unlock the record for editing
Define Actions
Printable View | Customize Page | Edit Layout | Help for this Page
Line Items [1] | Approval History [4]
Unlock Record
Edit
Delete
Clone
INV-0001
Owner
bob smith [Change]
Closed
My New Invoice
€3,512.00
bob smith, 06/10/2009 17:03
Last Modified By
Jon Mountjoy, 06/10/2009 17:06
Unlock Record
Edit
Delete
Clone
New Line Item
Line Items Help
Line Item Name
Submit for Approval
Approval History Help
Date
Status
Assigned To
Actual Approver
Comments
Overall Status
Approved
06/10/2009 17:06
Approved
Jon Mountjoy
Jon Mountjoy
really okay this time
Approval Request Submitted
06/10/2009 17:05
Submitted
bob smith
bob smith
Step: Step 1
Rejected
06/10/2009 17:05
Rejected
Jon Mountjoy
Jon Mountjoy
okay!
Track Approval History

Formulas, Workflows and Approvals

Enforce consistency regardless on how you access Force.com

Leverage spreadsheet-like logic

Automate manual processes

Keep data (and compliance) clean

Create a data model for a warehouse application which can be easily extended with business logic **for internal and external applications**

THANK YOU