**Order Management App**

**Introduction:** Order Management App is a platform to track Orders, Invoice and delivery status for the customer orders

**Type of Users:**

1. Business Users
2. Sales Users
3. Support Team

**Use Cases:**

1. Support team should able to create the business users, sales users and assign the users to respective roles / Account teams
2. No users will able to delete the any records expect Support team
3. Support team should able to see whole data under this app
4. Business users will able to view the accounts and related Contacts, Orders and Invoices only and it should not allow to edit or delete the data in the system
5. Sales Users should manage 5 accounts and they shouldn’t see the other Sales users managing accounts and its related data
6. Two Sales users will be reporting to each business users
7. Business users managing the 10 accounts and they shouldn’t see the accounts and related data of the other business users
8. Sales User only able to create the Orders
9. Use the LWC to creation / view / Edit of the orders
10. Override the Standards button on order object New, View and Edit buttons with LWC Components with help of Aura components
11. Order Capture screen should contain below info
    1. Search Section
       1. Product name / Product Code
       2. Brand
       3. MRP
12. Search result should display the product name, product code, discount, brand, stock qty and option enter the desired qty along with Save / Clear Search buttons
13. Need to add business logic while saving the order to add the one free same product if the order line item qty is above 10 when the order is getting save using Save button
14. Order Summary should contain below fields with order line items
    1. Order Number, Order value, Discount, total qty and final price

Order items with below info

product name, product code, discount, brand, stock qty and order line item Qty

it should allow to change update or delete the order items

Cancel order and Confirm Order

1. Order should go for Business user approval of the sales user if the order amount is more than $100000, when the Sales user Clicks on the Conform Order
2. Order will be confirmed if the order is less than $100000 directly
3. Order will be confirmed after approval of the business user else order in Saved status
4. Stock Quantity should be descried based on the order line item Quantity and it should not allow to create order for the product where the Stock Quantity is Zero
5. Sales user should able to create the invoice info (normally it will flow data from External system) in scenario, we can use data load to load the invoice data for respective orders
6. Invoice data contains the partial QTY of the order for delivery
7. Order Stage will be changed based on the invoice creation and delivery info
8. Order Stage should change programmatically only and Stage shouldn’t allow to change back to previous stage. Logic should be added in trigger order and Invoice objects
9. Order Stage should change only with full qty invoice / Payment Received /Delivered
10. Order Stages / Status
    1. Created
    2. In process
    3. Invoice Generated
    4. Payment Received
    5. Delivery in Plan
    6. Delivered
    7. Cancelled
11. Order Remarks filed is mandatary if the order stage is Cancelled else system should display the error message “Order Remarks filed is mandatary, Please enter the remarks”
12. Utilize only Standard Objects and Two Custom Objects
13. List of Standard Objects:
    1. Accounts
    2. Contacts
    3. Opportunity
    4. Order
    5. OrderProducts
    6. Product2
    7. Pricebook
    8. Pricebookentery
14. Use Standard fields and below custom fields
15. Custom Fields on the Account
    1. Email Opt Out : Check box (True by default)
    2. Account Type
       1. Sold To
       2. Ship To
16. Custom Fields on the Contact
    1. Email Opt Out : Check box (True by default)
    2. Contact Type
       1. Primary
       2. Secondary
17. Custom Field on Product2
    1. Stock Quantity
    2. Brand
18. Each account can have associated Contact more than one
19. Email notification should be based on the “Email Opt Out” field on Account and Contact
20. Email notification should not send out to any contact of the account if the “Email Opt Out” field unchecked on Account
21. Email notification should not send out to particular contact of the account if the “Email Opt Out” field unchecked on Contact
22. Notifications on each stage of order:
    1. Email notifications on each stage to the contacts and Sales team and use the Email template to populate the order info and order line items details
    2. In App notifications: Business users and Support team

**Custom Objects:**

1. Invoice:
   1. Invoice Number
   2. Invoice Date
   3. Invoice Quantity
   4. Invoice Payment Received
   5. Order Reference
   6. Account Reference
   7. Invoice Currency
   8. Open Amount
   9. Payment Due Date
   10. Price Discount
   11. Transactional Net Value
   12. Net Invoice Value
2. Product Invoice:
   1. Invoice Number
   2. Invoice Quantity
   3. Net Invoice Value
   4. Transaction Currency
   5. Transactional Net Value
   6. Order line Invoice Number
   7. Price Discount
   8. Product
   9. Product Code
   10. Unit Price

**Reports/ Dashboard:**

1. Sales reports compares with Current year vs Pervious year
2. Top 10 Brand products sales report
3. Order vs Invoice reports
4. Dashboard to show visual representation of above reports
5. Above Dashboard should display the data of the accounts which logged in business user / Sales user managed and Support user should able to view whole data of the All business / Sales users

**ERD:**

