

ORDER MANAGEMENT APP

Prepared For:

SFDC Training Program

Capgemini Technology Services

Prepared By:

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Abstract:

Order management app is a Salesforce application for creating orders and generating their invoices within Salesforce. It also tracks the order status, Invoice and delivery status.

Required validations and certain changes to the standard objects have been made to amake the process of tracking order, invoices and delivery status smoother.

Scopes:

Inscope:

The following functionality is provided by the system:

There are three categories of people who would access the system: Sales User, Business User and Support Team. Each of these would have some exclusive privileges.

1. Sales User:

- a. Can create and edit records.
- b. Delete records.
- c. View records.
- d. Approve Orders below \$100,000.

2. Business User:

- a. View Orders
- b. View Invoices.

c. Approve Orders > \$100,000.

3. Support Team:

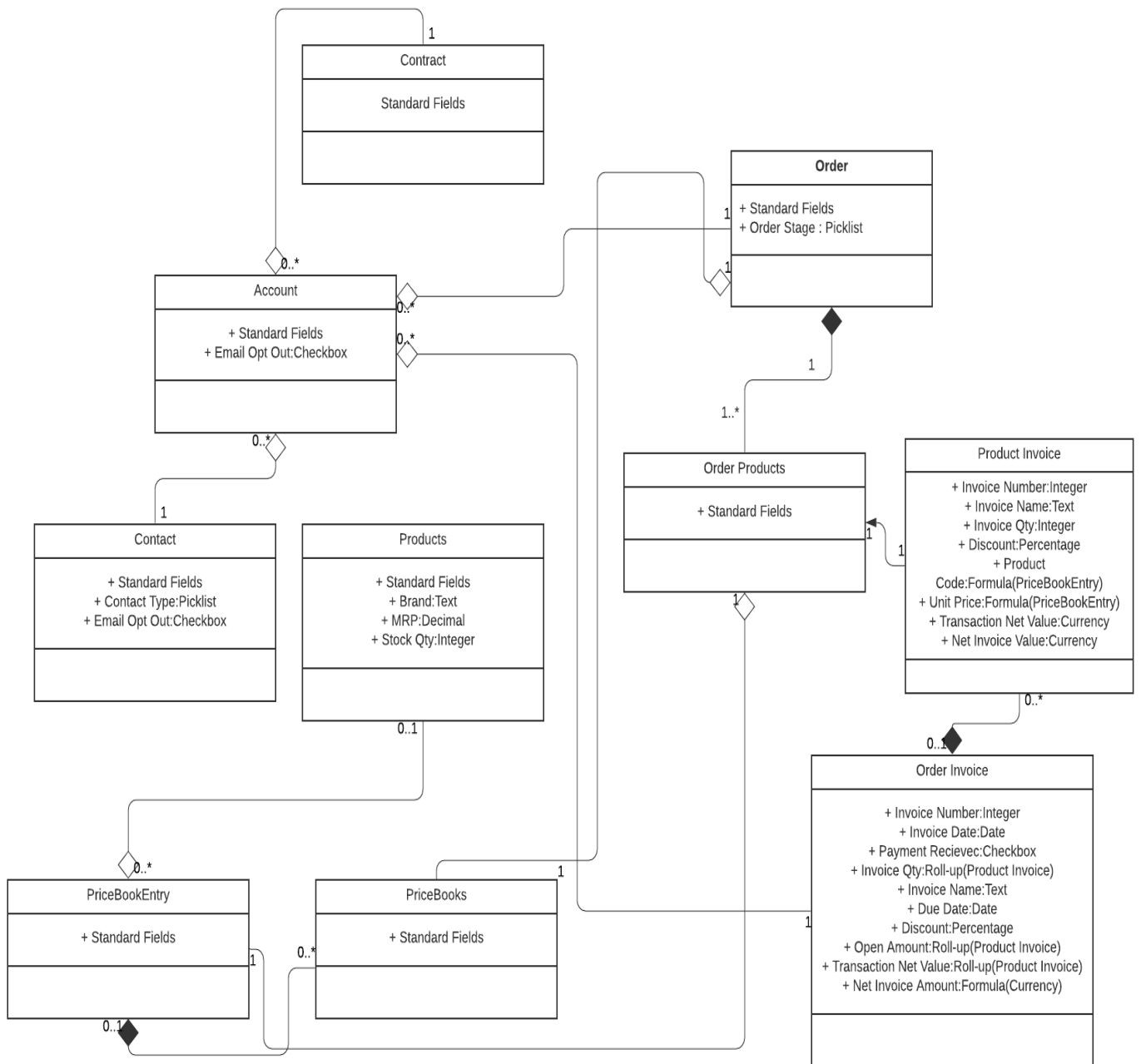
- a. Create Users of all types.
- b. Assign roles to the users.
- c. View all records in App.
- d. Delete all records in the app.

Outscope:

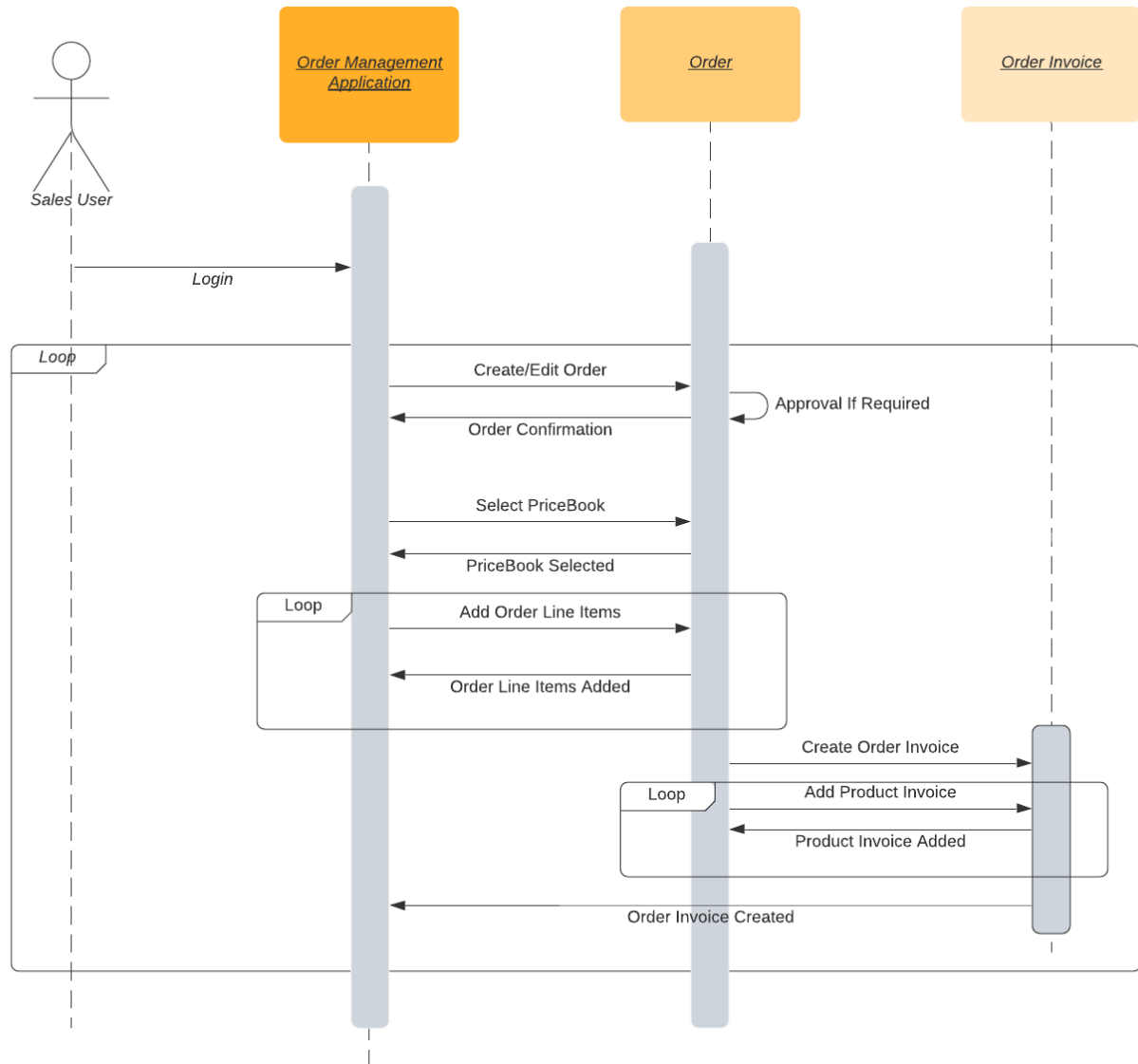
The following has not been covered in the app:

- 1. Printing of physical copies of the invoice.
- 2. Third party integrations like SMS alerts.
- 3. No payments can be accepted.

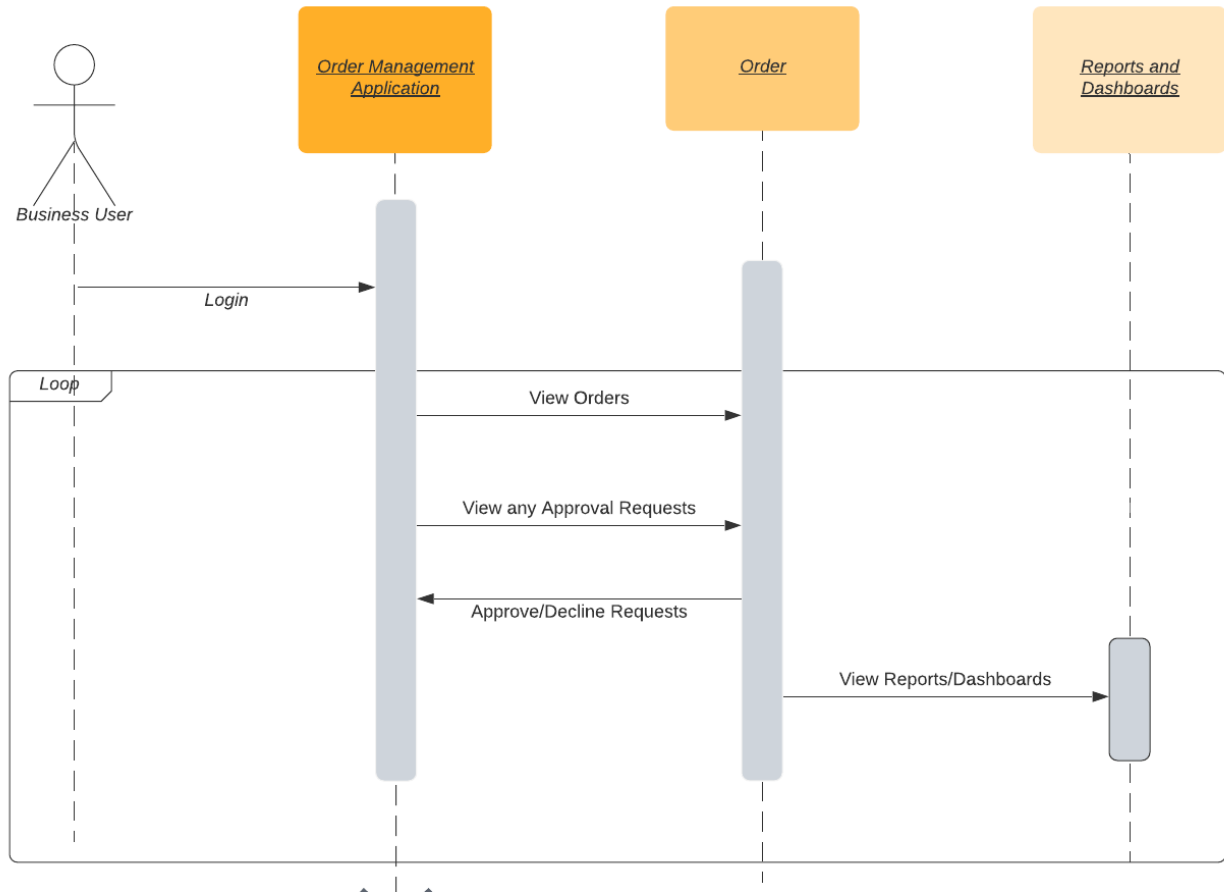
Class Diagram:



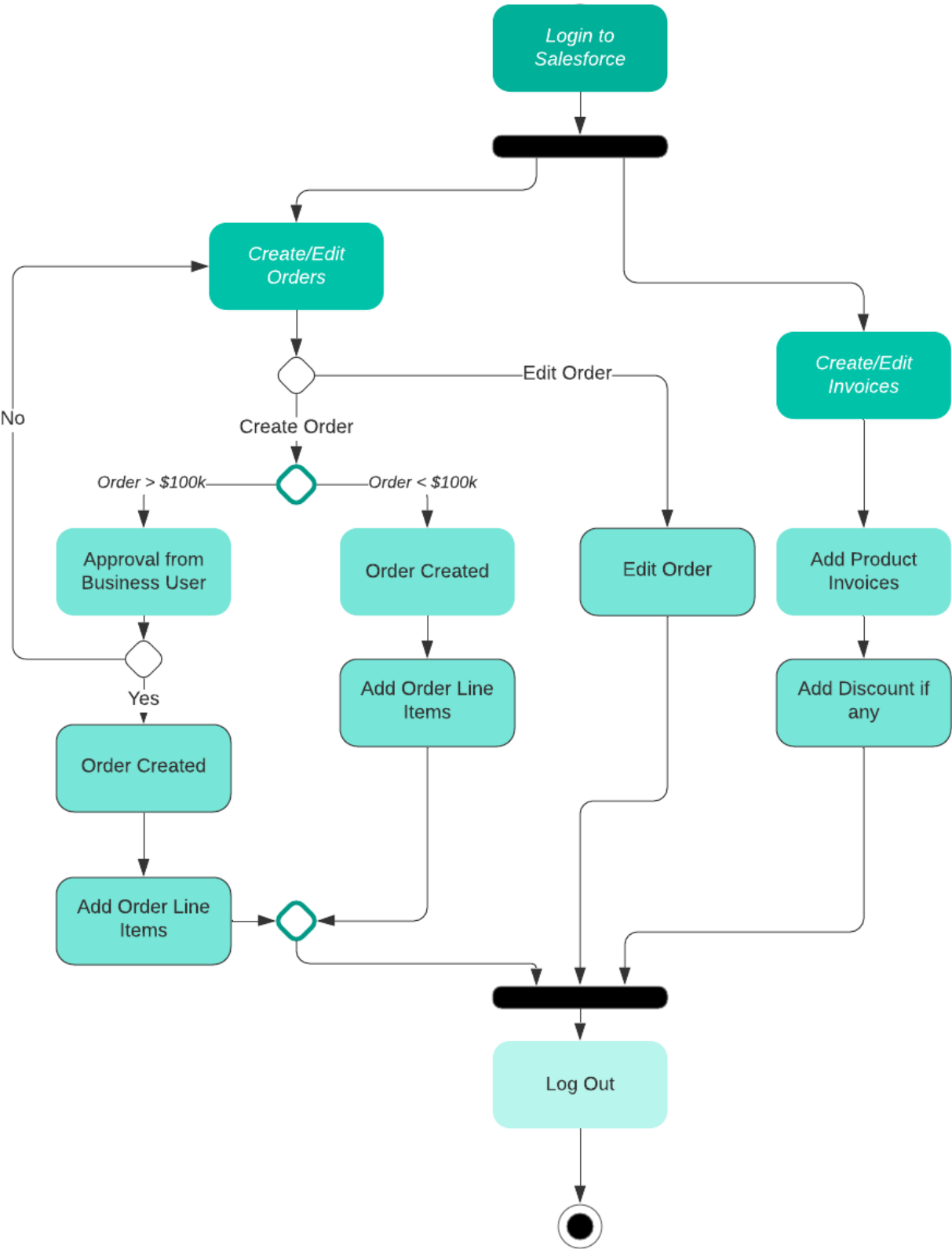
Sequence Diagram for Sales User:



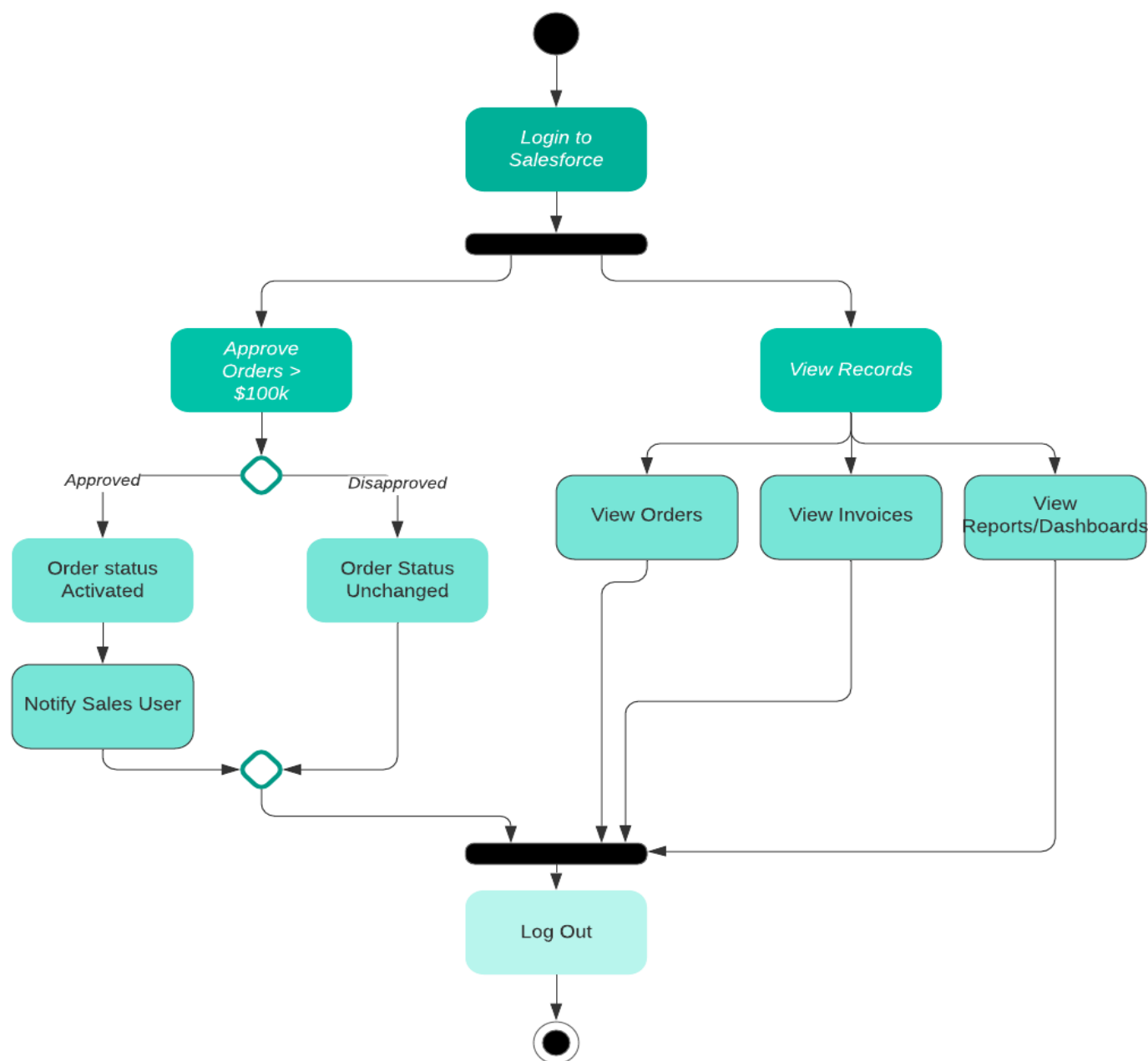
Sequence Diagram for Business User:



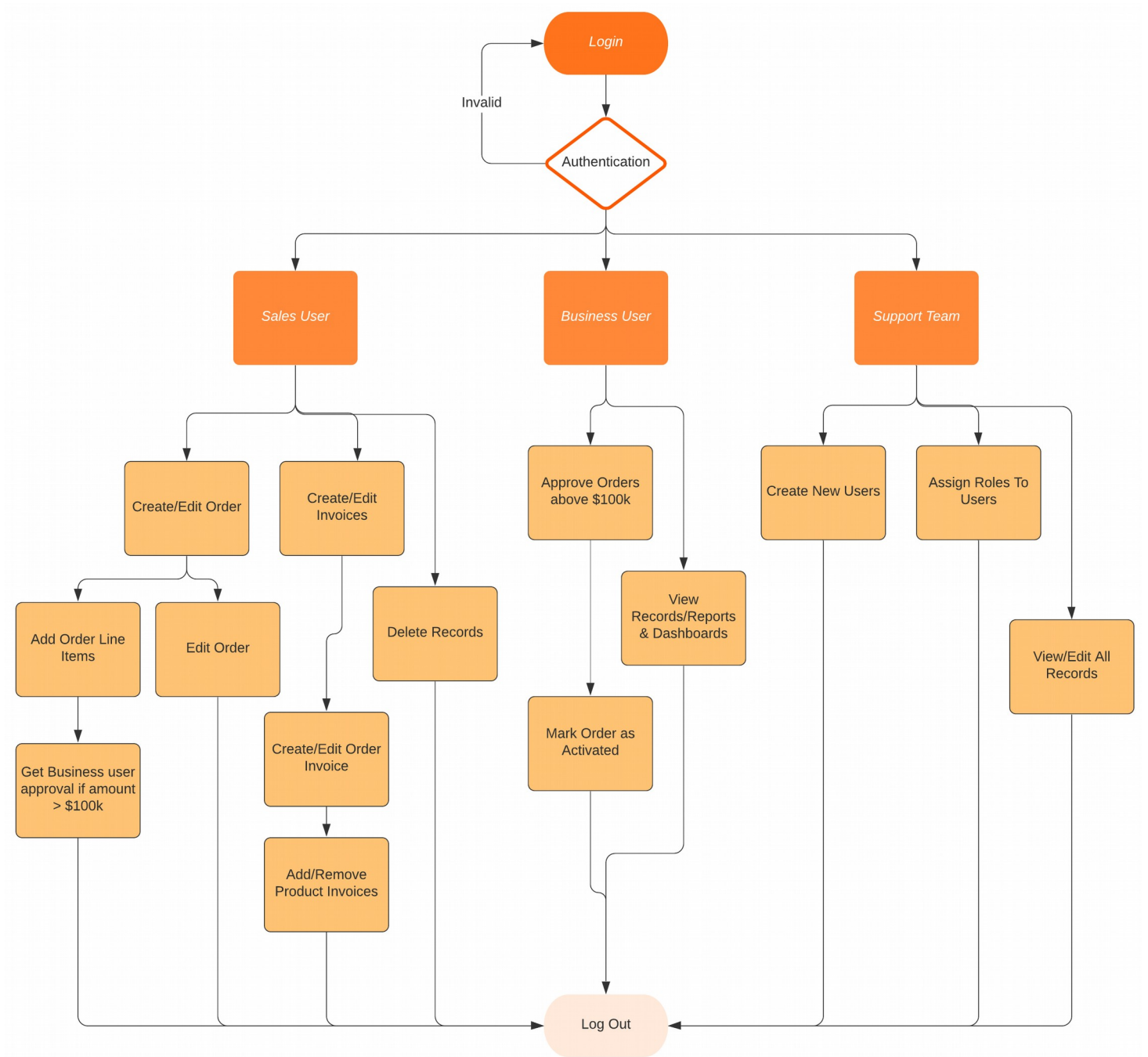
Activity Diagram for Sales User:



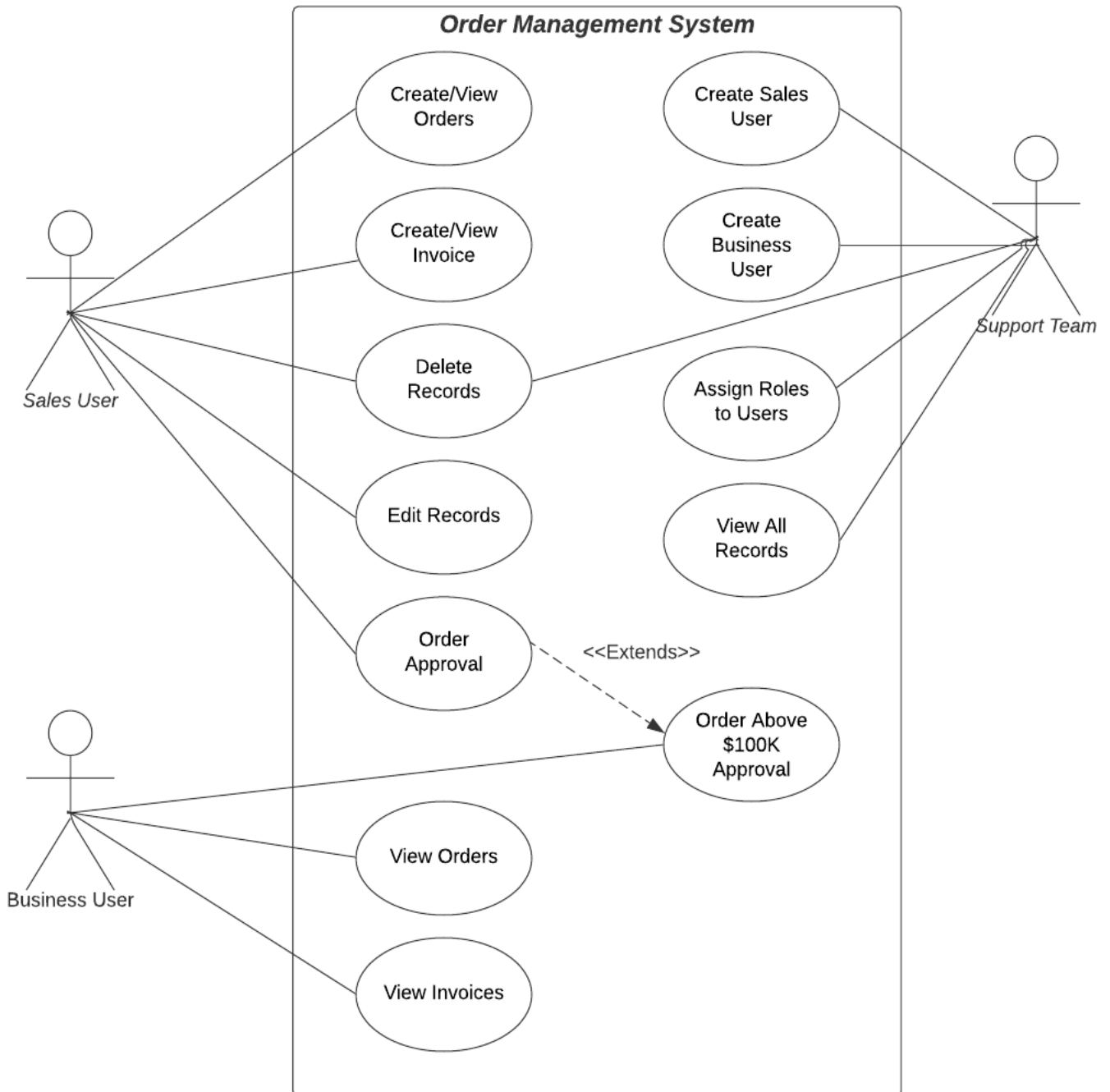
Activity Diagram for Business User:



Flow Chart:



Use Case Diagram:



Component of the App:

1. Create Order

❗ Vikendu Singh

All ▾

🔍 Search Orders and more...

★ ▾

+

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⚙️

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☐☐☐ Order Manageme...

Accounts ▾

Contacts ▾

Contracts ▾

Orders ▾

App Launcher

Order Invoices ▾

Product Invoices ▾

* Recently Viewed | Produc... ▾

✕

✎

Create New Order

Owner ID

Vikendu Singh

Contract ID

Search Contracts...

🔍

Order Number

Order Type

--None-- ▾

Account ID

Search Accounts...

🔍

* Status

Draft ▾

* Order Start Date

📅

Shipping Street

Shipping Street

⌵


Shipping City

Shipping State/Province

Shipping City

Shipping State/Province

2.Edit current record Lightning Component:

 Edit Order:


Account ID

United Oil & Gas Corp.

* Order Number

00000100


Contract ID

 00000100

×

* Order Start Date

Apr 24, 2020



Order Amount

\$7,800.00


* Order Stage

Delivered


▼

Update

3. Add Order Line items:



Order Products (3+)




GenWatt Diesel 1000kW

Product Code: GC1060

Quantity: 4.00

Unit Price: \$100.00




GenWatt Diesel 1000kW

Product Code: GC1060

Quantity: 2.00

Unit Price: \$100.00




GenWatt Diesel 1000kW

Product Code: GC1060


Quantity: 5.00

Unit Price: \$100.00



View All

4. Search Products Component(LWC & Admin):

 **Search Section:**

Enter Product Name

Search

Enter Brand Name

Search

Enter MRP

Search

Name	Product Code	Stock Quantity	Brand	MRP
GenWatt Diesel 200kW	GC1040		Asus	
GenWatt Diesel 10kW	GC1020			
GenWatt Diesel 1000kW	GC1060		Puma	

Search Products:

Enter Product Name

Enter Brand Name

Enter MRP

Next


Search Products:

Product Name: GenWatt Diesel 200kW Brand: Asus MRP: 10,000 Stock Quantity: 5

Product Name: GenWatt Diesel 1000kW Brand: GenWatt Diesel MRP: 100 Stock Quantity: 7


Previous Finish

5. Order Summary Lightning Component:

 View Order:

Owner ID	Contract ID
Vikendu Singh	00000100
Order Number	Order Amount
00000100	\$7,800.00
Account ID	Order Type
United Oil & Gas Corp.	
Order Start Date	Status
4/24/2020	Draft
Customer Authorized By ID	Shipping Address
Company Authorized By ID	Activated Date
Billing Address	Activated By ID
Order Stage	Created By ID
Delivered	Vikendu Singh
Created Date	Last Modified By ID
4/22/2020, 1:46 AM	Vikendu Singh
Last Modified Date	Description
4/27/2020, 1:28 AM	

6. New Order Aura component on Record Page:

 **New Order:**

Account ID

Q

Contract ID

Q

* Order Start Date


📅

* Order Stage

▼

New Order

7. Product Invoice summary component:

 Product Invoice

Sample Invoice

Details

Product Invoice Name

Sample Invoice

Invoice Number

002

Invoice Quantity

5

Net Invoice Value

\$475.00

Transactional Net Value

\$500.00

Order Invoice

[Sample Order Invoice](#)

Price Discount

5.00%

Product

[GenWatt Diesel 1000kW](#)


Product Code

GC1060


Unit Price

\$100.00


Created By

 [Vikendu Singh](#), 4/28/2020, 10:37 AM















Last Modified By

 [Vikendu Singh](#), 4/28/2020, 10:42 AM

8. Order Invoice summary component:

 Order Invoice

Sample Order Invoice


Related	Details
Order Invoice Name	Sample Order Invoice 
Invoice Number	01 
Invoice Date	4/29/2020 
Invoice Quantity	5 
Invoice Payment Received	<input type="checkbox"/> 
Order Reference	00000100 
Account Reference	United Oil & Gas Corp. 
Open Amount	\$475.00 
Payment Due Date	4/30/2020 
Price Discount	1.00% 
Transactional Net Value	\$500.00 
Net Invoice Value	\$470.25 
Created By	 Vikendu Singh, 4/28/2020, 10:34 AM
Last Modified By	 Vikendu Singh, 4/29/2020, 1:33 PM

9. Email Notification on stage change:

Order stage change alert. Inbox 



Vikendu Singh 7 days ago

to me 



Hello Vikendu Singh,

The Order Number 00000107 and 's stage is now changed to Invoice Generated.

NB:- This is an auto generated message. Do not reply to this email.

 Reply

 Reply all

 Forward

10. Reports & Dashboard:



Object Description:

1. Accounts: This object stores all the accounts associated with the org.

Attributes:

Standard Fields

Email Opt Out : Checkbox

Triggers:

CheckMaxAccounts :- Checks that sales user has a max of 5 accounts only

2. Contacts: This object is for all associated contacts of any particular account.

Attributes:

Standard Fields

Contact Type : Picklist

Email opt out : Checkbox

Triggers:

3. Contracts: This object is for all associated contracts of any particular account.

Attributes:

Standard Fields

Triggers:

4. Products: This object is for all associated products offered by the business.

Attributes:

Standard Fields

Brand : Text

MRP : Decimal(10,2)

Stock Quantity : Number

Triggers:

5. PriceBooks: This object contains list of products and their associated prices.

Attributes:

Standard Fields

Triggers:

6. PriceBookEntry: Every product and its associated price creates a price book entry in a particular PriceBook.

Attributes:

Standard Fields

Triggers:

7. Orders: This object stores all orders associated with a particular contract on any specific Account.

Attributes:

Standard Fields

Order Stage : Picklist

Triggers:

CheckOrderStage :- To check if the description is empty or not when the order stage is 'Cancelled'.

8. Order Products: Products ordered in any particular order are stored in this object. Their price is derived from the PriceBook selected in that particular order.

Attributes:

Standard Fields

Triggers:

AddFreeItems :- As per policy 1 free item is added for the purchase of 10 items.

CheckQuantity :- Check whether enough stocks of the requested product are available or not.

9. Product Invoice: The invoices of every single product order are stored in this object.

Attribute:

Invoice Number : Number

Invoice Name : Text

Invoice Quantity : Number

Discount : Percentage

Product Code : Formula(on PriceBookEntry)

Unit Price : Formula(on PriceBookEntry)

Transaction Net Value : Currency

Net Invoice Value : Currency

Triggers:

CalculateTotalAmount :- Calculates correct Transaction net value and Net Invoice Value and stores them in the respective fields.

10. Order Invoices: Invoice of an Order is stored with all it's products is stored in this object.

Attributes:

Invoice Number : Number

Invoice Name : Text

Payment Received : Checkbox

Invoice Quantity : Roll-up(on Product Invoice)

Invoice Name : Text

Due Date : Date

Discount : Percentage

Open Amount : Roll-up(on Product Invoice)

Transaction Net Value : Roll-up(on Product Invoice)

Net Invoice Value : Formula(Currency)

Triggers:

Validations:

1. All dates in the app are checked for correct timeline i.e., any date which has already passed cannot be entered.
2. Validation rule to ensure Order stage do not move backwards.
3. No order is added with products when stocks are not sufficient.
4. Every sales user can create and manage a max of 5 accounts only.