Sales Document Workflow Required Fields

Product Development - 2026-01-06 - Sales

Overview

SalesPad now allows you to configure required fields so you can prevent sales documents from moving through workflow until particular fields meet your criteria. This allows you to have more control over when documents move through your workflow queues, and make sure that specific values are set before a document can continue in your process.

This feature set is available as of SalesPad version 5.6.10.

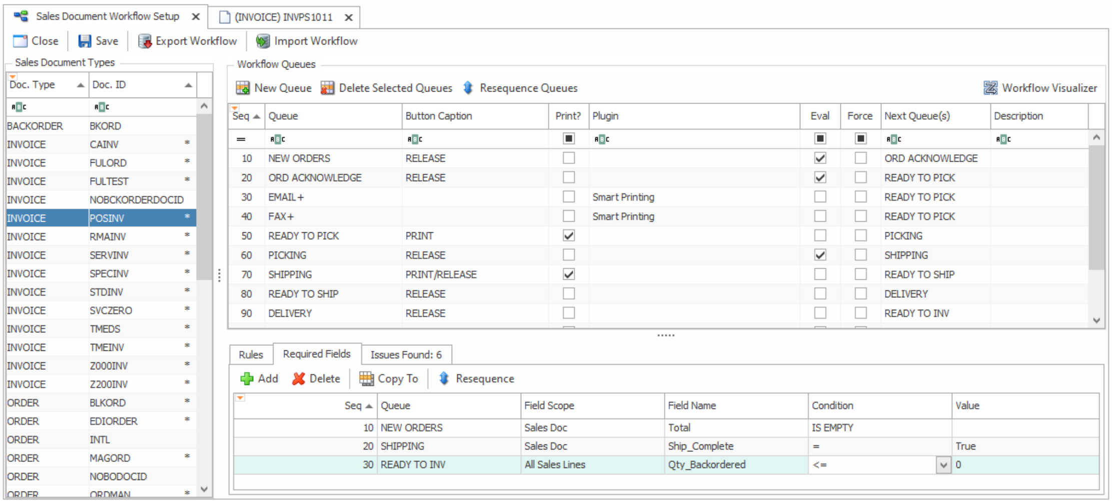
Setup

Securities

In order to configure required fields, Sales Document Workflow Setup must be enabled in the Security Editor (Modules > Security Editor).

Configuration

Required fields are available in a tab within the Sales Document Workflow Editor.



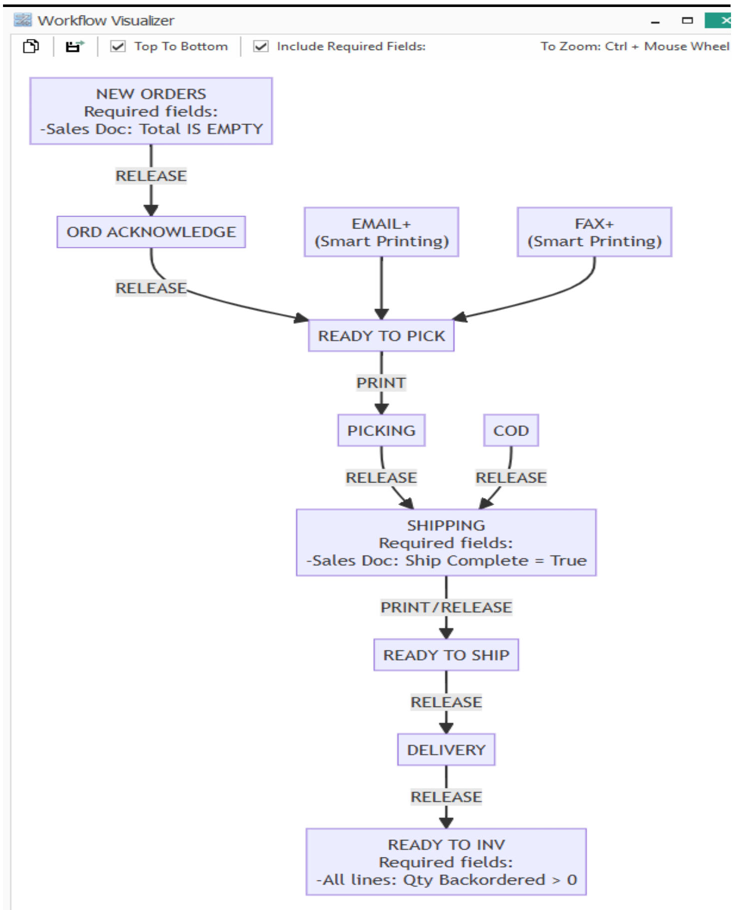
To create a new required field:

- Click the Add button to add a new row to the grid.
- Select a Queue from the pre-populated dropdown menu.
- In the Field Scope column, choose between “Sales Doc”, “Any Sales Line”, or “All Sales Lines”. Selecting “Sales Doc” will populate the Field Name dropdown with all available sales document fields, including user-defined fields. Selecting either of the Sales Line options will populate the Field Name dropdown with all available sales line item fields, including user-defined fields. “Any Sales Line” means that only one sales line on the sales document must meet the condition, while “All Sales Lines” means that all sales lines on the document must meet the condition.
- Choose a Field Name from the dropdown.
- Choose a Condition from the dropdown. Any condition can be selected, but not every condition can be applied to the chosen field. For example, if a boolean type field (like Ship Complete) is chosen, then the mathematical conditions (>, <, >=, <=) will not be applicable. An exception is text based fields that can be converted to numerical values, which can use mathematical conditions. This can be useful for text based user-defined fields that store a number as a text string.
- Lastly, enter a Value which will be tested with the condition.

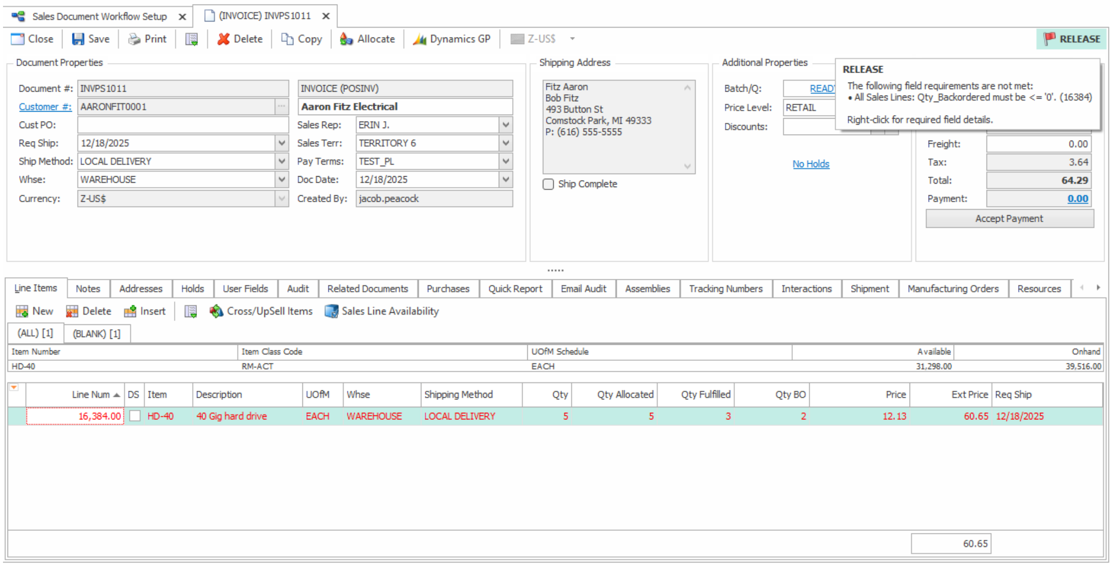
As an example, in the screenshot above, the highlighted Required Field checks if all sales lines on the document have a Qty Backordered that is less than or equal to zero, essentially checking if the document is fully fulfilled.

Required fields can be deleted using the Delete button, and they can be copied to other Sales Doc IDs using the Copy To button. The resequence button will resequence the required fields into multiples of 10.

Required fields are also included when importing and exporting workflows, and they will appear in the Workflow Visualizer flowchart as part of each queue node.

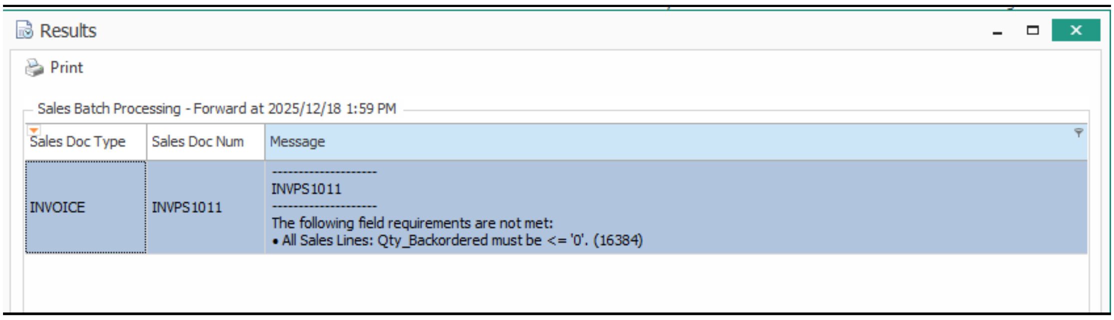


Sales Document Processing



When a sales document is in a queue that has required fields, and any required field conditions are not met, then the Sales Entry forward button's icon will display a red flag instead of the normal green arrow. Users can hover over the forward button to see which required fields are not met so that they can adjust the document accordingly. They can also right-click the forward button to see a popup that lists the required fields for the document's current queue, with clarification on which requirements have been met and which have not.

When using Sales Batch Processing or other screens to manually forward one or more documents through workflow, if any required fields are not met for a given document, then that document will not be forwarded. Instead, the user will receive a message that the document could not be forwarded because one or more field requirements has not been met. If multiple documents fail the required fields check, then they will each be listed in the popup with their unmet requirements.



The only process that ignores required fields is Automation Agent batch forwarding. Required fields are intended to prevent manual forward attempts for documents that are not ready to continue in workflow, while automated batch forwarding via Automation Agent is intended for documents that are ready to move to the next step in workflow.