Sales Document Workflow Review
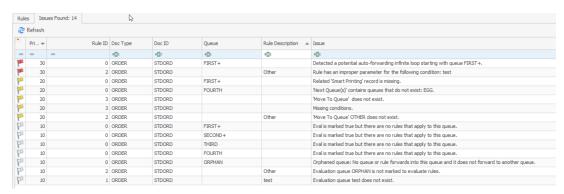
Product Development - 2025-02-17 - Utilities

Overview

Sales Document Workflow Review provides built-in checks for common workflow setup issues in the same place where workflows are configured. See real-time validation for your workflows, catch issues before they impact your process, and spend less time re-testing every change.

This feature is available as of SalesPad 5.5.9. For more general information on SalesPad workflow setup, please refer to [this documentation](#).

Workflow Review

The Sales Document Workflow Setup screen provides a new Review tab alongside the existing Rules tab. This tab automatically checks the current workflow for common problems and displays the number of found issues in the tab name. Loading the tab lists more details for those issues, with flags to represent their severity and potential process impact. Possible issues include common setup misses for workflow queues and their rules, as well as related configuration such as Smart Printing.

Critical Issues

Critical issues include errors which completely halt processing and setup which causes significant performance problems. These issues should be corrected as soon as possible, especially if they are found in production environments.

Infinite auto-forwarding loops

When a series of plus queues route in a never-ending sequence, this causes a significant drain on performance. For example: FIRST+ routes to SECOND+ which routes back to FIRST+, which causes documents to forward in this cycle indefinitely. A series of plus queues should end at a non-plus queue so that documents cannot be stuck in a constant loop.

Rule has improper parameters

When a workflow rule tries to check a field that does not exist, that rule will error instead of evaluating properly. Rules with the following Condition IDs are validated: SALES DOC FIELD=, ITEM FIELD=, SALES DOC USER FIELD=, CUSTOMER FIELD=. Update the workflow rule to check a valid field and ensure that it can evaluate and re-route the document as needed.

Warning Issues

Warning issues include missed or invalid setup that can cause unexpected behavior. These issues should be resolved to ensure the workflow works as expected.

Queue's Next Queue does not exist

When a workflow queue has a Next Queue that does not exist in the workflow, it will not be possible to forward documents out of that queue. Adjust that queue's Next Queue to be a valid queue name in order to reconnect the flow.

Queue missing Smart Printing record

When the Smart Printing plugin is attached to a workflow queue, but there is no Smart Printing record for that workflow queue, then no printing or emailing will occur. Review the Smart Printing Maintenance screen and set up a record for the target Queue to ensure printing or emailing happens as expected. If no printing or emailing should occur for this queue, then remove the Smart Printing plugin from it in workflow setup.

Rule's Move To Queue does not exist

When a workflow rule has a Move To Queue that is blank or does not exist in the workflow, then it will not be able to re-route documents that match that rule. Update that rule's Move To Queue to be a valid queue name so that it can re-route documents appropriately.

Rule missing conditions

When a workflow rule has no conditions, then it will not actually check anything for documents that trigger that rule. Instead, that rule will simply allow documents to forward to their next queue. Select at least one Condition ID to ensure the rule is performing the proper validation for that point in the process.

Trivial Issues

Trivial issues include partial setup that could cause a process issue without logging an error, or that could be intentional as part of a testing phase or custom process. These should be reviewed but may not need correction if they make sense for your process or testing scenario.

Queue flagged for Eval without a matching rule

When a workflow queue has Eval checked, but there is no workflow rule that is set up to evaluate this workflow queue, then nothing will evaluate documents leaving this queue. The Eval flag could have been accidentally set and may just need to be removed, or a rule may need to be created or updated to target this queue.

Orphaned queue

When a workflow queue does not forward into other queues, and no other queues or rules will place documents into that queue, then it is considered orphaned because it does not connect to the rest of the workflow. This could be intentional, e.g. for a review queue where users will manually move a document into that queue, and the reviewers will manually move the document to a destination queue afterward. Or it may have been missed setup, and the queue needs updating to hook into the process.

Rule's evaluation queue does not exist

When a workflow rule has a queue in its Eval When In Queue list that does not exist, then that rule will not trigger for that queue. This may be intended for testing scenarios when rules are still being set up, or the rule may need adjusting to target the proper queues.

Rule's evaluation queue is not flagged for Eval

When a workflow rule has a queue in its Eval When In Queue list that is not flagged for Eval, then that rule will not trigger for that queue. This may be intended for testing scenarios when rules are still being set up, or the queue may need its Eval checkbox to be flagged.