6573: Modifications to Sales Order Approval Workflow

Safety Technology international Inc

Overview of changes:

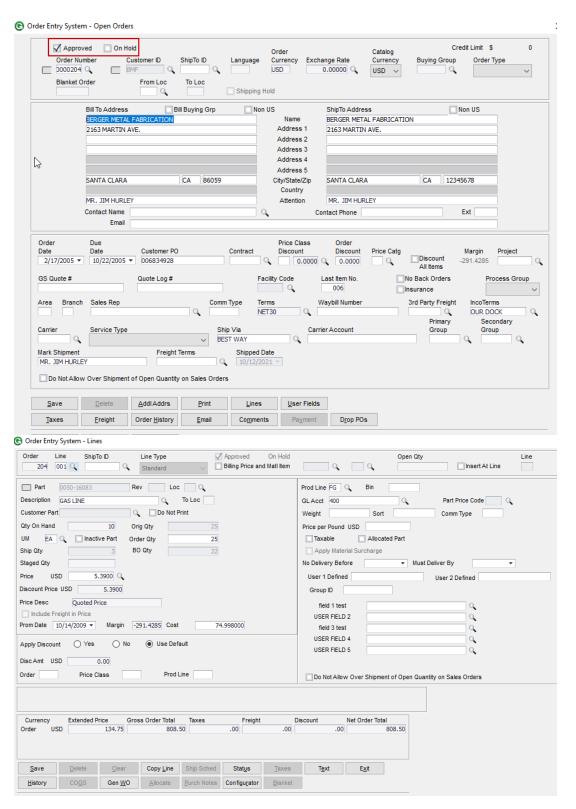
- Addition of "On Hold" checkbox for sales orders, both at header and line level
 - Set to view only on line level, changed if user is in SOAPP security group at the header level.
- When Sales order is marked as on hold, find all associated work orders & sequences that correspond to all lines and mark them on hold as well.
- Add user field 1 from order header, on hold, and approved columns to core Open sales order review dashboard.

Assumptions:

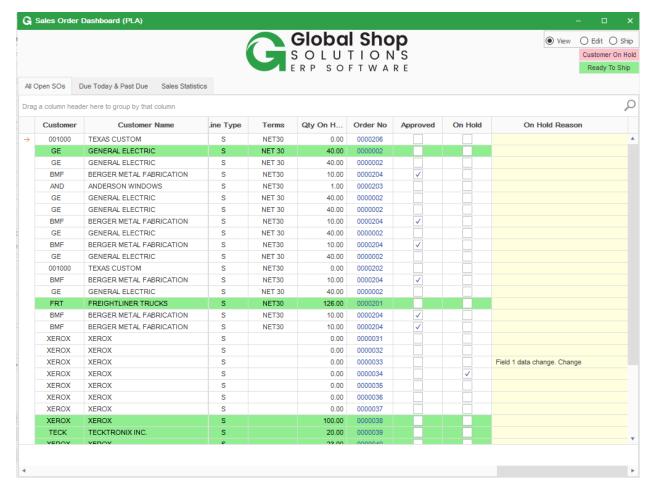
- All Sales orders at time of creation must be marked as approved or on hold prior to saving.
 - To ensure this, script will not allow you to save from sales order header screen until
 you mark it as on hold or approved. Checking one unchecks the other, and vice
 versa. For example, if an order is marked as approved, and the user unchecks the
 approved checkbox, it will automatically check the "on hold" checkbox.

Description:

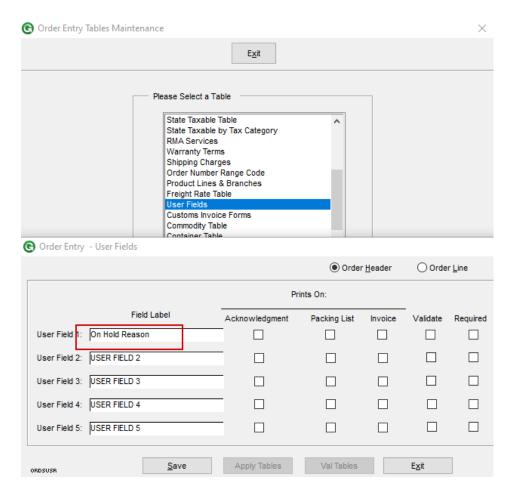
• New table "GCG_6573_SO_LINE_APP" is used to save every sale order line that has been saved since this project has been installed. Script reads this to set the checkbox states of the approved and on hold check boxes on the order header, order lines, and custom dashboard. Also records the date the sales order was first approved.



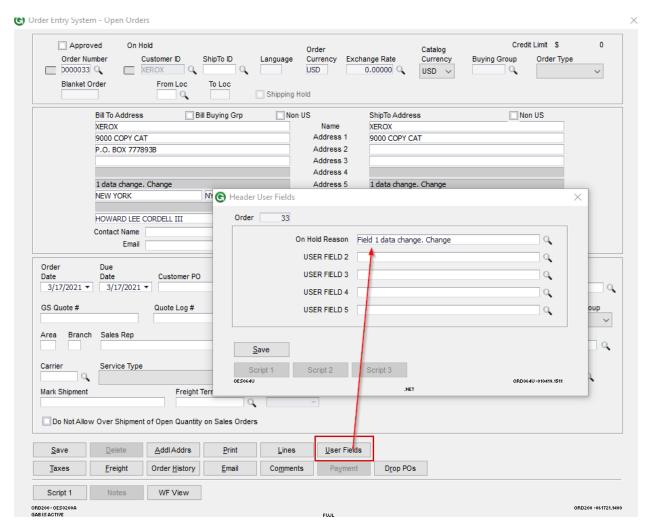
• In this example, sales order 204 is marked as approved, set as editable at header level due to this user being in the SOAPP security group. All of sales order's 204 lines will show as approved, and as view only.



- Much like the core order entry screen, the dashboard only allows one checkbox to be checked for each sales order, either approved or on hold that have been added or saved since the project was installed.
- Toggling a given sales order's approved or on hold checkbox will toggle the other checkbox and apply it to the entire sales order. i.e. If on sales order 204, a user unchecks the approved checkbox, the script will automatically uncheck all lines for SO 204, and check the on hold checkbox for those same lines.



• User field 1 (here titled "On Hold Reason") caption can be set in Company Options (Standard) > Order Entry Table Maintenance > User Fields, under the header section. This data is read from whatever is in the user field 1 textbox on the order header screen. This dashboard writes back to this core screen.



NOTE: If this field's value is changed while someone else has the same sales order open on the core screen, changes will not be reflected on that core order header screen until that user either relaunches the screen, or changes the sales order selected, and goes back to it.

Scenarios of when script writes to tables

Below shows all the instances that each of the 4 tables this project uses are written to/read from (2 core and 1 custom). Custom table starts with "GCG"

	JOB_HEADER	GCG_6573_SO_LINE_APP	SO_LINE_APPROVAL
SO Header: Check	Removes on hold flag for all work	If record exists (sales order and line combination)	Flags all sales order & line combinations as
"approved" or uncheck "on-hold"	orders tied to the given sales order lines' on screen	updates accordingly i.e. flag it as approved, and remove on hold flag.	approved.
SO Header: Uncheck "approved" or check "on-hold"	Adds on hold flag for all work orders tied to the given sales order lines' on screen	If record exists (sales order and line combination) updates accordingly i.e. remove approved flag, and add on hold flag.	Flags all sales order & line combinations as not approved.
SO Header: Save Order Checks states of checkboxes (if neither is marked or both are checked will cancel operation and warn user).	Reads check boxes and writes accordingly (update on hold flag for all work orders tied to the given sales order lines' on screen).	If sales order/ line combo is being approved for the first time, will record today's date as well as write appropriately. Any SO line records that were not previously in this table will be added, otherwise will just update the entry with the new flag values.	Flags all sale order/ line combinations appropriately
Dashboard: Toggle "Approved" or Toggle "On Hold"	Updates on hold flag for all work orders tied to the given sales order	Updates approved and on hold flags for sales order/line combo accordingly. New sales order/line combo must be added via core screen, which will not allow any records to be saved that are not marked one way or the other.*	Flags all sales order/line combos accordingly

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		ORDER_HEADER
	User field 1 value is changed	Writes to the sales order User_1 Field

*The dashboard will not be writing new entries to the custom table that aren't already in there. Ensure that any new lines that are added to a sales order are added through the core screen so that either the approved checkbox or on hold checkbox is checked. This way the new line can be added to the custom table. If a sales order has neither checkbox checked, then either the SO was added via some other method not from the cores screen, or the SO was created prior to installing this project. To fix, user should open those sales orders up in the core order header screen, check the box desired, and save.