

WCG - Order processing rules
Tom Dietsche (Revised 8/1/2012)

Order Conditions

Order Actions

Presale Order? (Note 1)	"No Order Today"?	Any Line Items?	Any Lot Detail?	Customer Signature?	Upload Data To Server? Field Whse (Note 6)		Update the ForceField DB? Field Whse		Send Order File To Canopy Field Whse		Send Lots File To Canopy Field Whse		Special Notes
No	No	No	No	No	No	No	No	No	No	No	No	No	
No	No	Yes	No	No	Yes	Yes	Yes	Yes	Yes	Yes	No	No	
No	Yes	No	No	No	Yes	Yes	Yes	Yes	No	No	No	No	Note 4
No	No	Yes	Yes	No	No	Yes	No	Yes	No	Yes	No	No	Note 2
No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Note 2
Yes	No	No	No	No	No	No	No	No	No	No	No	No	Note 5
Yes	No	Yes	No	No	No	No	No	No	No	No	No	No	
Yes	Yes	No	No	No	Yes	Yes	Yes	Yes	No	No	No	No	Note 4 & 5
Yes	No	Yes	Yes	No	No	Yes	No	Yes	No	No	No	No	Note 3
Yes	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	Yes	Yes	Note 3

Notes:

1. An order on the handheld is a "Presale Order" if the order header "Host Status" field contains "PRESALE". These orders came from Canopy. Non-Presale Orders were created on the handheld (by any user type).
Presale Orders were exported from Canopy to the handheld (could have been created on handhelds, in Canopy, by EDI, etc.)
2. New orders with no lot detail are only uploaded if they have line items, or if "No Order Today" is selected in the dropdown.
New orders with lot detail are always uploaded for the Whse user, otherwise only if they have a customer signature (other users).
Note this allows the Whse user to enter a new order on the Whse handheld, pick and stage it, and then either upload it for route delivery, or deliver it to the customer at the Whse and get a signature.
3. Presale Orders are only uploaded if they have lot detail and a customer signature (any user), or just lot detail (Whse user).
4. Only orders with line items can be sent to Canopy because the upload textfile requires line item information on each line.
5. A presale order should always have line items and never have "No Order Today" selected.
6. All non-Warehouse users (Delivery, Peddle and Sales) have the same actions for any given set of conditions.
So, they are combined here and listed as "Field" users.