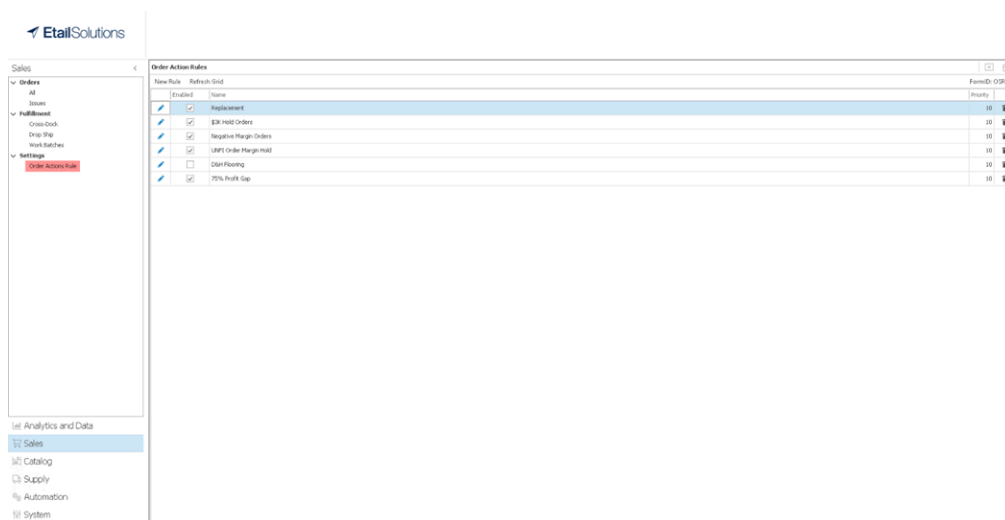


Order Action Rules Basics

What are Order Actions Rules

Order Action Rules (OAR) are an order management tool designed to automate business policies based on specific order conditions. When an order is imported into EVP, an OAR assesses various parameters of the order, either pre- or post-fulfillment. If the order meets the configured criteria, the corresponding actions are executed automatically.

Order Action Rules are accessed and configured via the Sales Module.



How OARs Work

Automation: Apply business logic to orders without manual intervention.

Priority: Multiple OARs may apply to a single order; they are evaluated in order of priority.

Activation: OAR must be enabled to be active.

Timing: OARs can run before or after EVP's Distributed Order Management (DOM) process. If you are unsure which to use, please consult your Etail Solutions representative.

How to Configure Order Action Rules

When creating a new OAR, the first step is to give it a Name and Priority. OARs apply in priority order. Multiple OAR may affect an order.

The screenshot shows the 'Order Selection Edit' window with the following configuration:

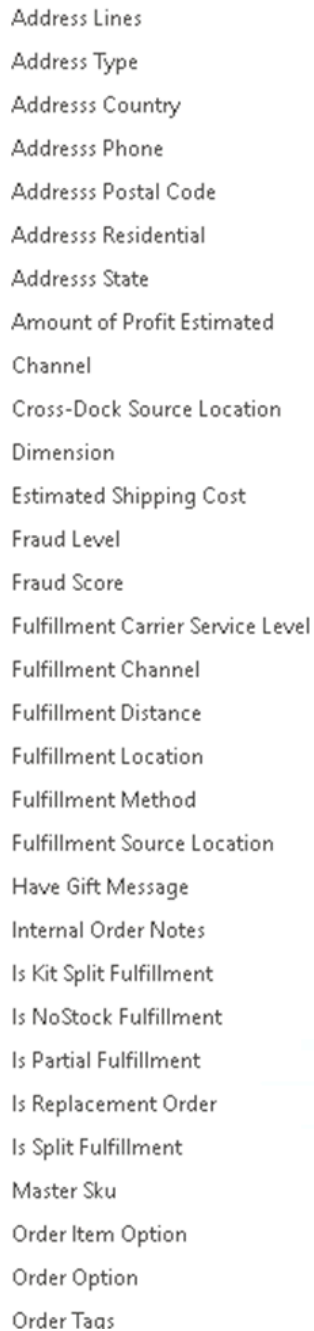
- Name:** Replacement
- Enabled:** ☒
- Priority:** 10
- Apply Rule:**
 - ☒ Before initial fulfillment assignment
 - ☐ After initial fulfillment assignment
- When This Happens:**
 - ☐ When ANY of these conditions are met
 - ☒ When ALL of these conditions are met
- Conditions:**
 - Is Replacement Order = True
- Do The Following:**
 - ☐ Don't change the order status
 - ☒ Put the Order on Hold
 - ☐ Cancel the Order
 - ☐ Create an Issue of Type
 - ☐ Set Fulfillment Service Level
 - ☐ Add Order Note
 - ☒ Hold until manually released
 - ☐ Add Order Tag

An OAR must be enabled for it to be active and apply to Orders.

The second step is to determine whether the OAR should be applied before or after EVP’s DOM is run. The context of the OAR will determine this factor. If you are uncertain, contact an Etail resource to help determine the best method.

Next, you will configure whether ALL conditions must be met or ANY for the rule to apply.

OAR conditions are listed below. Use the Add button to add additional condition checks. This article does not cover all condition checks in depth, but being familiar with the available conditions will allow you to leverage OAR to its fullest extent.



Address Lines
Address Type
Address Country
Address Phone
Address Postal Code
Address Residential
Address State
Amount of Profit Estimated
Channel
Cross-Dock Source Location
Dimension
Estimated Shipping Cost
Fraud Level
Fraud Score
Fulfillment Carrier Service Level
Fulfillment Channel
Fulfillment Distance
Fulfillment Location
Fulfillment Method
Fulfillment Source Location
Have Gift Message
Internal Order Notes
Is Kit Split Fulfillment
Is NoStock Fulfillment
Is Partial Fulfillment
Is Replacement Order
Is Split Fulfillment
Master Sku
Order Item Option
Order Option
Order Tags

OAR Condition Options

Finally, you will configure the actions the OAR takes if an order meets the specified conditions. Here are some example usages:

- Add an Order Tag

- Useful for creating filtered views on the Sales Order screen.
- Can also drive cartonization and packaging selection.
- Place the Order on Hold
 - Orders can be on Hold for a specific amount of time or until manually released.
- Cancel the Order Automatically
- Add an Order Note
- Create an Issue Record
 - Issues can trigger email alerts to appropriate teams.
- Adjust Fulfillment Service Level
- Flagging potential fraud orders for review.
- Routing special orders to specific fulfillment methods.
- Applying unique shipping rules for certain customers or regions.
- Ensuring compliance with business policies by automating cancellations or holds.

OARs streamline order processing by reducing manual intervention. For advanced scenarios, consult your Etail Solutions team to design rules that best fit your business processes.

Recap

When creating a new OAR:

1. **Assign a Name and Priority** – Priority determines the order of evaluation.
 2. **Enable the Rule** – Inactive rules will not apply.
 3. **Select Timing** – Choose whether the rule applies pre- or post-DOM.
 4. **Define Conditions** – Set criteria using the condition builder. Choose whether **ALL** conditions or **ANY** condition must be met for the rule to apply.
 5. **Set Actions** – Define what happens when conditions are met.
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