

Donation Preference

Rule Selected:

Auto-Reject: Donation Requests that fit within **auto-reject** rules are marked as **rejected** when they are processed by the rules engine.

Pre-Accept: Donation Requests that fit within **pre-accept** rules are marked as **pending approval** when they are processed by the rules engine.

Help Rule Selected:

Pre-Accept

Select...

Auto-Reject

Pre-Accept

+ Add rule + Add group

✕ Delete

✕ Delete

Clear Rules

Reset Rules

Save Rules

Run Rule Workflow

Note: If a donation request does not fit the rules for Auto-Reject or Pre-Accept it will display on the dashboard as **Pending-Rejection**

Building Rules

The first field contains the **subject** of the rule. This is the attribute from the donation request that will be compared.

Pre-Accept

NOT AND OR Invert

+ Add rule + Add group

↑↓ Dollar Amount

less or equal

✕ Delete

Clear Rules

Save Rules

Run Rule Workflow

Date Needed

Requester Name

Requester Type

Tax Exempt

Dollar Amount

Once a subject is selected, an **action** becomes available.

The screenshot shows a rule configuration interface. At the top, there is a dropdown menu set to 'Pre-Accept'. Below it, a rule editor bar contains logical operators: NOT, AND, OR, and Invert. To the right of these are buttons for '+ Add rule' and '+ Add group'. The main rule area shows a subject 'Dollar Amount' followed by a dropdown menu currently set to 'less or equal'. A red 'Delete' button is to the right. A dropdown menu is open below the 'less or equal' dropdown, showing options: 'less or equal', 'greater or equal', 'greater', 'less', 'equal', and 'not equal'. At the bottom, there are buttons for 'Clear Rules', 'Reset Rules', 'Save Rules', and 'Run Rule Workflow'.

The last step to building a rule is to set a **threshold**. To set the threshold you may need to enter a date, name, amount, or yes/no depending on the subject.

This screenshot shows the same rule configuration interface as before, but now the threshold value '100' is entered in the input field and is highlighted with a red rectangle. The dropdown menu for the action is still set to 'less or equal'. The 'Save Rules' button is now visible at the bottom.

For this example, donation requests with a dollar amount less than or equal to \$100 will be marked as **pending approval**.

Example Requests:

- \$25 pending approval
- \$125 no change

Additional Functions

Selecting **Not** will reverse the function of the rule. If selected, the example above changes to: Donation requests that do not have a dollar amount less than or equal to \$100 will be marked as **pending approval**.

This screenshot shows the rule configuration interface with the 'NOT' operator selected from the logical operators dropdown, which is highlighted with a red rectangle. The rule is now 'NOT Dollar Amount less or equal 100'. The 'Save Rules' button remains at the bottom.

- \$25 no change
- \$125 pending approval

Adding Another Rule

To add another rule select **+Add rule**

- Select **AND** if this rule should be in addition to the previous rule.
- Select **OR** if this rule should be independent of the previous rule.

Note: the selected **AND/OR** will be the darker blue.

The screenshot shows a rule builder interface. At the top, there is a dropdown menu labeled 'Pre-Accept'. Below it, a rule group is displayed with a yellow background. The group contains two rules. The first rule is 'Dollar Amount less or equal to 100'. The second rule is 'Tax Exempt equal to Yes'. Between the two rules, the operator 'OR' is selected and highlighted with a red box. The interface also includes buttons for 'NOT', 'AND', 'OR', 'Invert', '+ Add rule', and '+ Add group'. Each rule has a 'Delete' button.

In this example, **OR** is selected, so it reads:

If a donation request is submitted with a dollar amount less or equal to \$100 **or** is from a tax-exempt organization, the status will change to **pending approval**.

Grouping Rules

To build a group of rules select **Add group** and then build the new rule.

This rule will **pre-accept** donation requests less than or equal to \$100 **or** tax exempt **or** any requests for Youth Sports/Activities at ABC Middle School

Pre-Accept ▼

☐ NOT
 ☒ AND
 ☐ OR
 ☒ Invert
 + Add rule + Add group

☒ Dollar Amount ▼ less or equal ▼ 100 ✕ Delete

☒ Tax Exempt ▼ equal ▼ ☐ No ☒ Yes ✕ Delete

☐ NOT
 ☒ AND
 ☐ OR
 ☒ Invert
 + Add rule + Add group ✕ Delete

☒ Requester Name ▼ contains ▼ ABC Middle School ✕ Delete

☒ Requester Type ▼ equal ▼ Youth Sports/Activities ▼ ✕ Delete

Clear Rules
Reset Rules
Save Rules
Run Rule Workflow

Managing Rules

To **add** another rule, select **+Add rule**

Pre-Accept ▼

☐ NOT
 ☒ AND
 ☐ OR
 ☒ Invert
 + Add rule + Add group

☒ Dollar Amount ▼ greater or equal ▼ ✕ Delete

☒ ▼ ✕ Delete

Clear Rules
Reset Rules
Save Rules
Run Rule Workflow

To **remove** an individual rule select **xDelete**

Pre-Accept ▼

☐ NOT
 ☒ AND
 ☐ OR
 ☒ Invert
 + Add rule + Add group

☒ Dollar Amount ▼ less or equal ▼ 100 ✕ Delete

Clear Rules
Reset Rules
Save Rules
Run Rule Workflow

- **Clear Rules:** Delete all rules.
- **Reset Rules:** Clears any changes made to the rules prior to saving rules
- **Save Rules:** Once the rules are acceptable, select to make them permanent.

Pre-Accept

☒ NOT

AND

OR

☒ Invert

+ Add rule

+ Add group

↑↓

Dollar Amount

less or equal

100

✖ Delete

Clear Rules

Reset Rules

Save Rules

Run Rule Workflow

Run Rule Workflow

Once rules are saved, Run Rule Workflow will process all submitted requests using the created rules.

Pre-Accept

☐ NOT

AND

OR

☒ Invert

+ Add rule

+ Add group

↑↓

Dollar Amount

less or equal

100

✖ Delete

Clear Rules

Reset Rules

Save Rules

Run Rule Workflow