### **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.

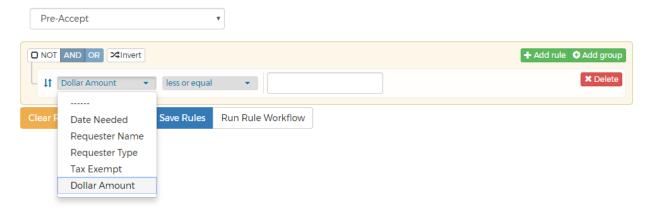


**Note**: If a donation request does not fit the rules for Auto-Reject or Pre-Accept it will display on the dashboard as **Pending-Rejection** 

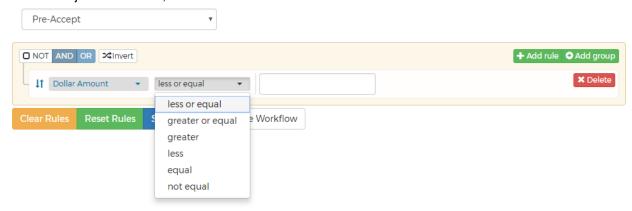
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### **Building Rules**

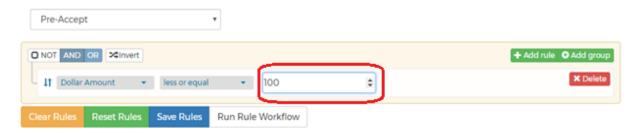
The first field contains the **subject** of the rule. This is the attribute from the donation request that will be compared.



Once a subject is selected, an action becomes available.



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.



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**.



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

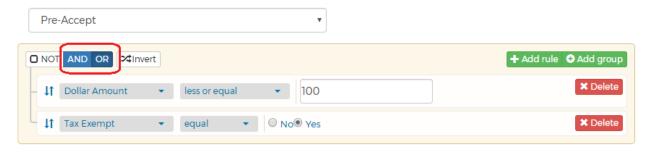
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## **Adding Another Rule**

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.



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

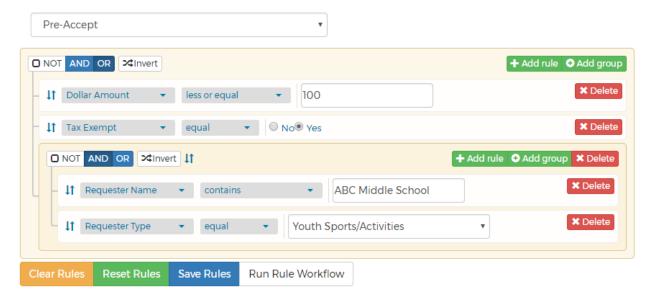
If a donation request is submitted with a dollar amount less or equal to \$100 **or** is from a tax-exempt organization, the status will change to **pending approval**.

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## **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



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# **Managing Rules**

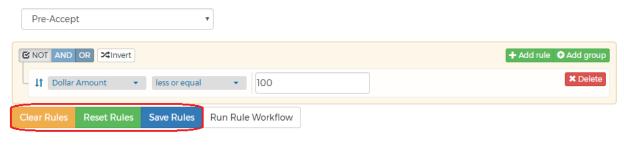
To add another rule, select +Add rule



To remove an individual rule select xDelete



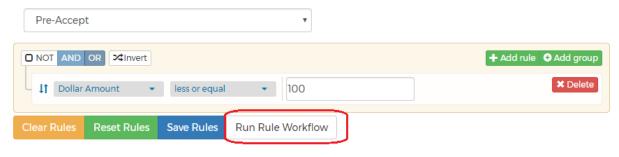
- Clear Rules: Delete all rules.
- Reset Rules: Clears any changes made to the rules prior to saving rules
- Save Rules: Once the rules are acceptable, select to make them permanent.



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#### Run Rule Workflow

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



## How Rules Workflow Works

When a request for donation is submitted the system looks to see if it meets criteria set by the user for **Auto-Reject**. If so, the status of the request changes to **Rejected**. If not, the system looks to see if the request meets the criteria set by the user for **Pre-Approve**. If so, the status of the request changes to **Pending Approval**. If not, the status is changed to **Pending Rejection**.

