Donation Preference: Rules Tutorial

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.
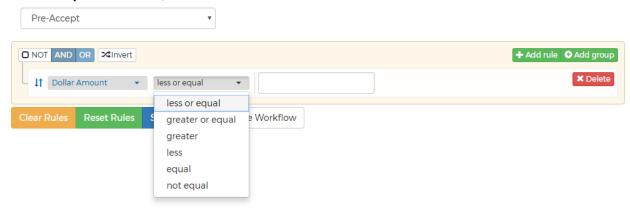

Note: If a donation request does not fit the rules for Auto-Reject or Pre-Accept it will display on the dashboard as **Pending-Rejection**

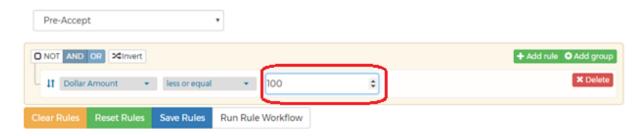
Building Rules

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

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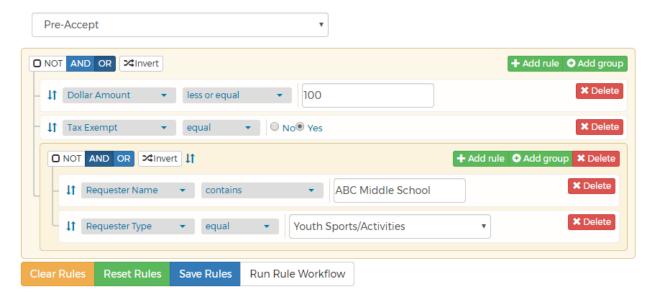
Note: the selected **AND/OR** will be the darker blue.

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**.

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
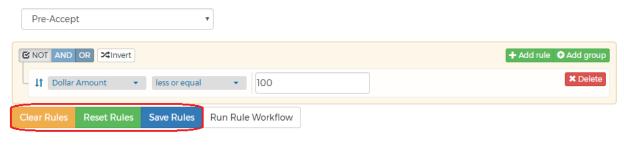

Managing Rules

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.

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**.

```
  ┌──────────────┐                     ◇
  │  Donation    │              ◇   Auto-Reject?  ◇ ──Yes──▶  ✗
  │  Request     │──────────▶        ◇                     Request Status =
  │  Submitted   │                     ◇                       Rejected
  └──────────────┘
                                       │
                                      No
                                       │
                                       ▼
                                     ◇
                               ◇  Pre-Approve?  ◇ ──Yes──▶  ✓
                                     ◇                     Request Status =
                                       ◇                   Pending Approval
                                       │
                                      No
                                       │
                                       ▼
                                       ✗
                                 Request Status =
                                 Pending Rejection
```