

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.

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 is being configured with the subject 'Dollar Amount' and the action 'less or equal'. A dropdown menu is open, showing the following options: 'less or equal', 'greater or equal', 'greater', 'less', 'equal', and 'not equal'. The 'less or equal' option is currently selected. To the right of the dropdown menu, there is a 'Delete' button. Below the rule configuration area, there are buttons for 'Clear Rules', 'Reset Rules', 'Save Rules', and 'Run Rule Workflow'. The 'Save Rules' button is highlighted in blue.

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.

The screenshot shows the same rule configuration interface as before, but now the threshold value '100' is entered in the input field. The 'less or equal' dropdown menu is still open. The 'Delete' button is still present. Below the rule configuration area, the buttons are 'Clear Rules', 'Reset Rules', 'Save Rules', and 'Run Rule Workflow'. The 'Save Rules' button is highlighted in blue.

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**.

The screenshot shows the same rule configuration interface as before, but now the 'NOT' checkbox is selected, indicating that the rule is reversed. The 'less or equal' dropdown menu is still open. The 'Delete' button is still present. Below the rule configuration area, the buttons are 'Clear Rules', 'Reset Rules', 'Save Rules', and 'Run Rule Workflow'. The 'Save Rules' button is highlighted in blue.

- \$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, a dropdown menu is set to "Pre-Accept". Below it, a row of logic operators includes "NOT", "AND", "OR", and "Invert". The "OR" operator is highlighted with a red box. To the right of these operators are two green buttons: "+ Add rule" and "+ Add group". Below the operators, there are two rule conditions. The first condition is "Dollar Amount" less than or equal to "100". The second condition is "Tax Exempt" equal to "Yes". Each condition has a "Delete" button to its right.

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

The screenshot shows the rule builder interface with a grouped rule set. The top dropdown is "Pre-Accept". The logic operators row shows "AND" and "OR" as darker blue, indicating they are selected. The "+ Add rule" and "+ Add group" buttons are present. Below the operators, there are three rule conditions. The first condition is "Dollar Amount" less than or equal to "100". The second condition is "Tax Exempt" equal to "Yes". The third condition is a group of two rules: "Requester Name" contains "ABC Middle School" and "Requester Type" equal to "Youth Sports/Activities". Each condition has a "Delete" button to its right. At the bottom, there are four buttons: "Clear Rules", "Reset Rules", "Save Rules", and "Run Rule Workflow".

Managing Rules

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

The screenshot shows a rule management interface. At the top is a dropdown menu labeled 'Pre-Accept'. Below it is a yellow panel containing logic operators: NOT, AND, OR, and an Invert button. To the right of these operators are two green buttons: '+ Add rule' (highlighted with a red box) and '+ Add group'. Below the operators, there are two rule entries. The first entry shows 'Dollar Amount' in a dropdown, followed by 'greater or equal' in another dropdown, and an empty text input field. To the right of this entry is a red 'Delete' button. The second entry shows a similar structure but with a different value in the dropdown. Below the yellow panel is a row of four buttons: 'Clear Rules' (orange), 'Reset Rules' (green), 'Save Rules' (blue), and 'Run Rule Workflow' (white).

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

This screenshot is similar to the previous one, but the rule entry now has the value '100' in the text input field. The red 'Delete' button next to the rule entry is highlighted with a red box. The rest of the interface, including the operators, buttons, and dropdown menu, remains the same.

- **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.

This screenshot shows the 'Save Rules' button highlighted with a red box. The rule entry with the value '100' is still present. The interface elements are consistent with the previous screenshots.

Run Rule Workflow

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

This screenshot shows the 'Run Rule Workflow' button highlighted with a red box. The rule entry with the value '100' is still present. The interface elements are consistent with the previous screenshots.

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**.

