

Mandatory Config JSON - Quick Guide

1) Structure

- **Entity block**
 - **default**: fields required when no rule contributes anything
 - **rules[]**: AND-combined **condition[]**, plus **mandatory[]**
- **Rule precedence** Merge **mandatory** from all **matching rules**. If the merged list is **empty**, fall back to **default**.

Tiny example

```
{
  "default": ["name"],
  "rules": [
    { "name": "vip", "mandatory": ["wrn_viplevel"],
      "condition": [{ "field": "wrn_isvip", "operator": "eq", "value": true }] }
  ]
}
```

2) Operators

- **eq** -- equal
- **ne** -- not equal
- **in** -- value is in list (or any overlap for multi-select)
- **isnull** -- empty / not set
- **isnotnull** (alias: **notnull**) -- set / not empty

3) Field types & values

- **Text**: string, case-insensitive.
- **Boolean**: **true/false** (strings also accepted).
- **OptionSet (single)**: number code.
- **OptionSet (multi-select)**: array of numbers/strings; **in** checks **overlap**.
- **Lookup**:
 - Default (no suffix): if **value** is a **GUID** -> compare by **ID**, else by **Name**.
 - Explicit projection: **field.id** / **field.name** / **field.entityType**.

GUIDs can include **{}**; string & GUID compares are case-insensitive.

Tiny examples

```

{ "field": "customertypecode", "operator": "eq", "value": 1 }           // single
OptionSet
{ "field": "worm_tags", "operator": "in", "value": [101, 202] }       // multi-
select overlap
{ "field": "primarycontactid", "operator": "eq", "value": "Jane Doe" } // lookup
by name
{ "field": "primarycontactid.id", "operator": "eq", "value": "{A1...}" } // lookup
by GUID
{ "field": "ownerid.entityType", "operator": "eq", "value": "systemuser" } // user
vs team
{ "field": "worm_country", "operator": "isnull" }                     // empty

```

4) Rule evaluation

- Conditions inside one rule are **AND**.
- Multiple matching rules -> **union** of all their **mandatory** fields.
- **Defaults apply only if** that union is empty.

Tiny examples

```

// No rule matches -> use default
{ "default": ["name"], "rules": [
  { "mandatory": ["primarycontactid"], "condition": [
    { "field": "worm_isvip", "operator": "eq", "value": true } ] }
]}

// Two rules match -> union of both mandatory lists
{ "default": ["name"], "rules": [
  { "mandatory": ["primarycontactid"], "condition": [{ "field": "code",
"operator": "eq", "value": 1 } ] },
  { "mandatory": ["ownerid"], "condition": [{ "field": "worm_isvip",
"operator": "eq", "value": true } ] }
]}

```

5) Best practices

- Prefer **.id** for stable lookup checks; use **.name** for human-readable matches.
- Keep rule **mandatory** lists minimal and explicit; **don't** rely on **default** if rules should also include those fields--repeat them in each matching rule.
- Use **in** for both scalar and multi-select scenarios.