

Knowledgebase > SalesPad > Miscellaneous > Business Rules

# **Business Rules**

Megan De Freitas - 2024-11-22 - Miscellaneous

Please note that Business Rules and Sales Document Promotions are no longer sold or supported. Existing customers with the Business Rules .dll will still receive limited support, but this support may require developer time at additional cost.

### Overview

Business Rules is a tool that allows you to create, delete, or update records for any Business Object in SalesPad, by specifying certain actions (e.g. before saving a sales document) and conditions (e.g. if the document has backorder items).

Business Rules can be used in a myriad of ways. For example, administrators can set up rules to determine special pricing based on values on the Sales Document and/or Sales Line Items. Another example could be setting up promotions such as "buy 1 get 1 free" or "additional freight charge if you buy less than 10 items."

Business Rules is not limited to Sales Documents and can be applied to almost any Business Object in SalesPad (Customer, Vendor, Purchase Order, Item Price, Item Master, etc.).

Please note that Business Rules is a beta feature.

**Attention:** Business Rules is a very powerful tool as it allows you to manipulate virtually any object in SalesPad. For this reason, you must be very careful when setting up your rules, as you can potentially damage important data in SalesPad (and Dynamics GP). Always test your rules thoroughly in a TEST environment before deploying them into your live database.

**Note**: A separate dll is necessary to run Business Rules. Please contact your Sales Representative if you are interested in obtaining this dll.

	Business Rules	Business Rules Maintenance
SalesPad Today	Dashboard Distribution BOM Equipment Management Inventory	Sales Document Mass Update Sales Batch Sales Line Mass Update Sales Batch Processing
& Cus	Purchasing RemoteLibrary Reports Sales	aintenance X
Rules	Setup / Utilities System	Rule   🕃 Export Rules 🛞 Import Rules

#### **Business Rules Maintenance**

Business Rules Maintenance form can be access from the menu under Business Rules.

A Business Rule is structured as follows:

• Rule Business Object

- The object and the event that triggers the rule evaluation.
- Conditions
  - One or more Business Objects that will be evaluated when the event from the Rule Business Object is triggered.
- Effects
- One or more Business Objects that define the effects that are applied when conditions are met.
   Effect Parameters
  - The list of field names and values for the effect(s) Business Objects.

## **Rule Setup**

Setting up Business Rules highly depends on the business objects that are applied and the structure of the conditions. This section will explain the basics steps to create a simple rule. Please refer to the section "Examples of Business Rules" for other examples.

SalesPad	×
Please select a business object:	~
RecurringSalesPayment SalesBatch SalesComment	^
 SalesDocument SalesDocumentAudit	
SalesDocumentCommission SalesDocumentCreditCardPayment	~

Click New Rule and select the Business Object from the ones available from the input box.

Give the rule a name and choose the appropriate event.

Rule Name	Business Object	Event	Enabled
pdate line descriptions	SalesDocument	PreSave 🗸	
		PreSave	
		PostSave	
		OnDelete	

The event (and the Business Object) determines when the rule is evaluated. In this example, the rule will be evaluated when any sales document is being saved.

Click New Condition to begin building the rules. A condition is defined by the following characteristics:

- Property Name
- Field Name
- Operator
- Value

onditions					
🜵 New Condition 🛛 🖊 Delet	te Condition 🕒 Copy Condi	tion 🛛 🏦 Move Up 🚽	Move Down 🦄 N	Nove Out 🔌 Move Ir	ı
Parent Join	Business Object	Property Name	Field Name	Operator	Value
NoJoin	SalesDocument		Sales_Doc_ID	Equal	STDORD

In this example, the Property Name is left empty: this means that the current condition will be applied to a Business Object of the same type as the rule (SalesDocument).

Select a Field Name by clicking the dropdown. Note that the dropdown includes all the fields available for the current Business Object; this includes User Defined Fields, where applicable.

Choose the appropriate operator and set the value according to your needs.

In this example, the condition can be translated to: "The condition is true if the value in the field 'Sales\_Doc\_ID' is equal to 'STDORD', for the business object 'SalesDocument'."

Parent Join	Business Object	Property Name	Field Name	Operator	Value
NoJoin	SalesDocument		Sales_Doc_ID	Equal	STDORD
And	SalesDocument	N	,	Equal	
		Customer Discounts FulfilmentDetail Holds LineItemDefaults LineItems			
effects	Effect	NamedNotes NewDocuments Payments POs RecurringDefinitions		Delete Parameter 🛛 🎜	Add Dynamic Value

Click again on **New Condition** to add another condition to the rule. This time we are going to use Property Name.

Each Business Object has several properties, depending on what the object represents. For instance, SalesDocument has LineItems (of type SalesLineItem) as one of its properties. SalesDocument also has Customer, Discounts, TrackingNumber, Payments, etc.

There are properties that share the same Business Object type; for example, both LineItems and LineItemDefaults are a type of SalesLineItem.

Select **LineItems** as the Property Name, then choose **Quantity** for Field Name, with Operator set to 'Greater Than Or Equal' and a Value of '5'.

The conditions above, as a whole, can now be translated into: "Conditions are met if the value in the field 'Sales\_Doc\_ID' is equal to 'STDORD' for the business object 'SalesDocument', AND the Line Items have a quantity of 5 or more."

🜵 New Condition 样	Delete Condition 🕒 Copy Condi	tion   🏠 Move Up 🔰	Move Down 🦄 N	Nove Out у Move In	
Parent Join	Business Object	Property Name	Field Name	Operator	Value
NoJoin	SalesDocument		Sales_Doc_ID	Equal	STDORD
And	SalesLineItem	LineItems	Quantity	Greater Than Or Equal	5

**Note:** The order and the structure of conditions are very important, as they give different meanings to the condition. See the Structure of Conditions section for more details.

Click **New Effect** to add an effect. Like for Conditions, Effects are specified by Property Names. In our example we would like to update the item description: under Property Name choose **LineItems** (the Business Object will automatically change to SalesLineItem).

Select the appropriate Action (in our example we will use Update). There are four possible actions that can be applied to effects:

- Create: creates a new object of the type specified in the Business Object field.
- Update: update objects of the type specified in the Business Object field.
  - The effect will be applied only to objects that meet the conditions. For instance, in our example, only items with quantity of 5 or more will be applied the effect Update (if the document is type of 'STDORD').
  - $\circ~$  If Conditions did not have LineItems but only SalesDocument, then the effect will be applied to all line items in the document.
- Delete: delete objects of the type specified in the Business Object field.
- As for Update, the effect is applied only to objects that return 'true' in the conditions.
- Run Script: allows users to run a C# script
  - $\,\circ\,\,$  The column Script will become visible if this option is selected.
  - $\circ~$  By clicking the ellipsis, the SalesPad Script Editor form will pop up.
  - $\circ~$  Parameters for the script depend on the business object.

		Busin	ess Rules E	ffect Script	-	×			
es	Parameters: SalesLir	neItem salesLineItem					opy Conditio	on 🛛 🏠 N	love Up
ject						^	Object	Propert	y Name
ent							ument		
	Compile	Disable Script	Enable Script	t [	OK	Cancel	Item	LineIten	Ef
				Business Object	Property Name	Action	Apply To	Script	
				SalesLineItem	LineItems	Run Script	Once	~	
Cl	ose 📙 Save	Tabs					-		
Form N	Name 🔺	🖶 New 💥 Delete							
Custon	merCard	Seq Form Nan	e	Form Type		Form Value		Selected 1	Tabs
Purcha	aseOrderEntry	0 SalesDoo	umentEntry	Sales_Doc_ID		SERVICE		~	
Vendor	rCard								

The "Apply To" option is used for actions 'Create' and 'Run Script' only.

"Apply To" selection:

- "Once": this will create one new line item if there is at least one item with quantity 5 or more.
- All Referring Conditions': this will create as many new line items as the number of items that have quantity 5 or more.

In our example we will update the item description to line items. Click the dropdown to select the desired Field

Name.

Effects						Effect Parameters	
New Effect	样 Delete Effect					🕴 🖶 New Parameter 🎽	🕻 Delete Parameter 🛛 ঝ Add Dynamic Value 🔹
Business Object	Property Name	Action		Apply To	Script	Field Name	Value
SalesLineItem	LineItems	Update	~	N/A		Item_Description	
						Inventory_Acct_Index Is_Dropship Is_Non_Inventory Item_Blocked Item_Curr_Dec Item_Description	

The list of fields depends on the Business Object of the selected Effect.

🖶 New Parameter 🔉 D	elete Parameter 🛛 🙀 Add Dynamic Value 👻
Field Name	Value
Item_Description	Awesome Description

Add a value of your choice.

Add Dynamic Value allows you to use values that change according to the environment. For example, we could add 'Username' (this will place the string '{username}' in the Value field), and the system will replace the tag with the user name when applying the effect.

Close 😂 Refresh 😽 S	ave									
Please restart SalesPad in or	der to apply your changes.									
ules				Conditions						
🜵 New Rule 📕 Delete Ru	ule 🗅 Copy Rule   🐻 Exp	ort Rules 🔞 Im	port Rules	🕴 🍄 New Conditio	on 🕌 Delete Condition		Condition   🏠 M	love Up 🤳 Move Dov	n 🐴 Move Out 💁 Move In	
Rule Name	Business Object	Event	Enabled	Parent Join	Business Object	Pro	operty Name	Field Name	Operator	Value
and the line descriptions				1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1						
puerce in el description is	SalesDocument	PreSave		□ NoJoin I And	SalesDocument SalesLineItem	Line	reItems	Sales_Doc_JD Quantity	Equal Greater Than Or Equal	STDORD 5
	SalesDocument	PreSave		⊡ NoJoin iAnd	SalesDocument SalesLineItem	Line	veltems	Sales_Doc_ID Quantity	Equal Greater Than Or Equal	STDORD 5
puere and used poors	SalesDocument	PreSave		Effects	v SalesDocument SalesLineItem	Line	veltems	Sales_Doc_ID Quantity Effect Parameters	Equal Greater Than Or Equal	STDORD 5
	SalesDocument	PreSave		Effects	SalesDocument SalesLineItem	Line	heltems	Sales_Doc_JD Quantity Effect Parameters	Equal Greater Than Or Equal	STDORD 5
	SalesDocument	PreSave	×	Effects Business Object	SalesDocument SalesLineItem  Delete Effect Property Name	Line	Apply To	Sales_Doc_JD Quantity Effect Parameters : @ New Parameters Field Name	Equal Greater Than Or Equal ter X Delete Parameter Value	STDORD S
	SalesDocument	PreSave	X	Effects	Salesionument     Salesi, meltem     Salesi, meltem     Delete Effect     Property Name     Linettems	Line	Apply To	Sales_Doc_ID Quantity Effect Parameters \$\overline{P}\$ New Parameter Field Name Item_Description	Equal Greater Than Or Equal ter Delete Parameter Value Awesome Des	STDORD S Add Dynamic Value

Now that the rule is complete, click Save.

**Note:** Changing parameters, or adding/deleting Conditions and/or effect will NOT require the user to restart SalesPad.

To test this rule, open up a customer card of your choice and create a new sales document of type 'STDORD' (since this is one of the conditions).

Do	cument Propertie	s								Shippi	ing Address	
Do	cument #:						ORDER (STD	ORD)		Aaro	n Fitz Electrical	^
Cu	stomer #:	AARONFIT0001					Aaron Fitz	Electrical		Bob F 1140	Fitz 13 45 St. South	
Cu	st PO:			Sales Rep:	P	AUL W.				<ul> <li>Chica</li> <li>Pr(3)</li> </ul>	ago, IL 60603-0776	
Re	q Ship:	7/25/2013	~	Sales Terr:	: Т	ERRITO	RY 1			✓ F:(3)	12) 555-0102	
Shi	p Method:	LOCAL DELIVERY	~	Pay Terms	: C	REDIT	CARD			~		~
Wł	ise:	WAREHOUSE	~	Doc Date:	7	/25/20	13		1	✓ ✓ Sł	nip Complete	
Cu	rrency:	Z-US\$	~	Created B	y: fr	redericp	)					
Shi	p To Addr Code:	WAREHOUSE	V		_							
											1	
Line	e Items Notes 1	Addresses Holds User Fi	ields Au	dit Relate	d Document:	s Purc	hases Quick Re	eport FedEx Quot	e Email Audit	Assemblies	Tracking Numbers	Packages
Line	e Items Notes /	Addresses Holds User Fi	ields Au Packag	dit Relate Je Editor	d Documents Item Numbe 100XLG	s Purd	hases Quick Re	eport FedEx Quot Item Class ATT COR	e   Email Audit Code	Assemblies	Tracking Numbers	Packages Schedule IE 1-10
Line	e Items Notes / New 👥 Delet Item	Addresses Holds User Fi te   📸 Insert   📖   🥥 Description	ields Au Packag	dit Relate ge Editor	d Documents Item Numbe 100XLG	s Purd ar Qty U(	hases Quick Re	eport FedEx Quot Item Class ATT COR Comment F	e Email Audit Code D	Assemblies	Tracking Numbers UOfM PHON	Packages Schedule IE 1-10 Qty Fulfil
Line	E Items Notes / New Delet Item 100XLG	Addresses   Holds   User Fi te   🏥 Insert   🎲 🍑 Description Green Phone	ields Au Packa <u>c</u>	dit Relater je Editor	d Document: Item Numbe 100XLG	s Purcl ar Qty U( 1 Ea	hases Quick Re DfM	eport FedEx Quot Item Class ATT COR Comment F	e Email Audit Code rice Source TANDARD	Assemblies	Tracking Numbers UOfM PHON	Packages Schedule IE 1-10 Qty Fulfil
Line	E Items Notes / New E Delet Item 100XLG HD-60	Addresses Holds User Fi te Marken Insert I I I I I I I I I I I I I I I I I I I	ields Au Packag	dit Relater ge Editor	d Document: Item Numbe 100XLG	s Purd ar Qty U( 1 Ea 5 EA	DfM Lch	eport FedEx Quot Item Class ATT COR Comment F S S	e Email Audit Code Trice Source TANDARD	Assemblies	Tracking Numbers UOfM PHON	Packages Schedule IE 1-10 Qty Fulfil
Line	E Items Notes / New Delet Item 100XLG HD-60 HD-20	Addresses Holds User Fi te Market I I III IIII IIIII IIIIIIIIIIIIIIIII	ields Au	dit Relater	d Documents Item Numbe 100XLG	s Purd ar Qty U( 1 Ea 5 EA 2 Ea	DfM Quick Re	eport FedEx Quot Item Class ATT COR Comment F S S S	e Email Audit	Assemblies	Tracking Numbers UOfM PHON	Packages Schedule IE 1-10 Qty Fulfil
Line	Item Notes / New I Delet 100XLG HD-60 HD-20 A100	Addresses Holds User Fir te Marken Insert I I I I I I I I I I I I I I I I I I I	ields Au	dit Relater	d Documents Item Numbe 100XLG	s Purch ar Qty UC 1 Ea 5 EA 2 Ea 7 EA	DfM CH	eport FedEx Quot Item Class ATT COR Comment F S S S S S S S	e Email Audit Code Drice Source TANDARD TANDARD TANDARD TANDARD PGROUP	Assemblies	Tracking Numbers UORM PHON	Packages Schedule IE 1-10 Qty Fulfil

Based on the rule conditions, you should expect a new description for the three line items with quantity greater than or equal to 5, and the comment to be your user name (for the same items).

Document Propertie	es							Shipping Ad	dress
Document #:	ORDST2690				ORDER	(STDORD)		Aaron Fitz	Electrical
Customer #:	AARONFIT0001				· Aar	9	SalesPa	d	×
Cust PO:			Sales Rep:	PAUL	V.				
Reg Ship:	7/25/2013	*	Sales Terr:	TERRI	TORY 1				
Ship Method:	LOCAL DELIVERY	¥	Pay Terms:	CREDI	T CARD	Saved ORDER	:ORDST2690.		
Whse:	WAREHOUSE	*	Doc Date:	7/25/2	013				
Currency:	Z-US\$	~	Created But	frederi	m				
			created by.	neoch	Ψ.				
Ship To Addr Code:	WAREHOUSE	~	cicaleo by.	Incoch	Ψ				ОК
ine Items Notes	WAREHOUSE	Fields A	udit Related Doc	uments Pu Number .G	rchases	Item ATT	1 Class Code CORD		OK UOfM Schedule PHONE 1-10
Ship To Addr Code: ine Items Notes 7 Rev Rev Rev Delet Item	WAREHOUSE Addresses Holds User I te P Insert III 2	Fields A	udit Related Doc	uments Pu Number G Qty	rchases	Item ATT Comment	Class Code CORD Price Source		UOfM Schedule PHONE 1-10 Qty Fulf
ine Items Notes 7	WAREHOUSE Addresses Holds User te Plansert  Description Green Phone	Fields A	udit Related Doc	uments Pu Number G Qty 1	rchases UOfM Each	Item ATT Comment	Class Code CORD Price Source STANDARD		UOfM Schedule PHONE 1-10 Qty Fulf
ine Items Notes // New Delet Item 100XLG HD-60	WAREHOUSE Addresses Holds User te Professorie Insert Green Phone Awesome Description	Fields A	udit Related Doc	uments Pu Number G Qty 1	uOfM Each EACH	Item ATT Comment fredericp	Class Code CORD Price Source STANDARD STANDARD		OK UOfM Schedule PHONE 1-10 Qty Fulf
ine Items Notes // New Delet Item 100XLG HD-60 HD-20	WAREHOUSE Addresses Holds User I te Professoriation Green Phone Awesome Description 20 Gig Hard Drive	Fields A Packa	udit Related Doc	uments Pu Number G Qty 1   5   2	uOfM Each EACH Each	Item ATT Comment fredericp	Class Code CORD Price Source STANDARD STANDARD STANDARD		OK UOfM Schedule PHONE 1-10 Qty Fulf
Item 100XLG HD-60 A100	WAREHOUSE Addresses Holds User I te Professorial Insert Description Green Phone Awesome Descript 20 Gig Hard Drive Awesome Descript	Fields A Packa ion	udit Related Doc	uments Puu Number G Qty 1 5 2 2 7	uofM Each Each Each Each Each	Item ATT Comment fredericp fredericp	Class Code CORD Price Source STANDARD STANDARD STANDARD SPGROUP		OK UOfM Schedule PHONE 1-10 Qty Fulf

When the document is saved, the conditions are evaluated and, if met, the effects are applied.

# **Structure of Conditions**

Parent Join	Business Object	Property Name	Field Name	Operator	Value
NoJoin	✓ SalesDocument		xBoolean	Is True	
And	SalesLineItem	LineItems	Item_Number	Equal	a100
i Or	SalesLineItem	LineItems	Item_Number	Equal	100XLG
- And	SalesLineItem	LineItems	Item_Description	Equal	Green Phone

Conditions are saved in a tree-like structure that represents logical expressions.

The example above can be written as the following logical expression:

xBoolean = 'true' AND Item\_Number = 'A100' OR ( Item\_Number = '100XLG' AND Item\_Description = 'Green Phone' )

The order of conditions matters: in this case '100XLG' with 'Green Phone' (wrapped around parentheses) will be evaluated first.

New Condition	Delete Condition	opy Condition   🏠 Mov	e Up 🦊 Move Down 🦄	Move Out 🔌 Mov	e In
arent Join	Business Object	Property Name	Field Name	Operator	Value
∃ NoJoin	✓ SalesDocument		xBoolean	Is True	
🚊 And	SalesLineItem	LineItems	Item_Number	Equal	a100
Or	SalesLineItem	LineItems	Item_Number	Equal	100XLG
And	SalesLineItem	LineItems	Item_Description	Equal	Green Phone

xBoolean = 'true' AND ( Item\_Number = 'A100' OR Item\_Number = '100XLG' ) AND Item\_Description = 'Green Phone' In this case, 'A100' with '100XLG' will be evaluated first.

Conditions can be moved around by using the "Move" buttons.

**Note:** Some restrictions are applied. For example, the top condition cannot be moved. Properties available in the drop-down depend on the "parent" conditions.



For instance, in picture above, on the left-hand side you notice that the highlighted condition is a child of a SalesDocument; therefore the dropdown will only have properties of the SalesDocument business object.

In the picture on the right, the selected condition is a child of SalesLineItem; this means that in the drop down you find properties of SalesDocument and SalesLineItem (as a matter of fact, the selected condition has ItemMaster as property).

Because properties depend on the "parent" conditions, you are not allow to move conditions "in" or "out" if the action would break the parent-child relationship.

Form	Tabs	i 🤒 😡 Dala					
Form Name		ew 🚜 Dele	ite				
CustomerCard		Seq	Form Name	Form Type	Form Value		Selected Tabs
PurchaseOrderEntry		0	SalarDocumentEntry	Sples Doc ID	SERVICE	10	
SalesDocumentEntry		0	Salesbocumenterna y	Sales_DOC_ID	SERVICE	*	<u>c</u>
VendorCard							
VendorCard							

In this example we cannot move out the ItemMaster condition because ItemMaster is not a property of SalesDocument. If instead of ItemMaster we had SalesLineItem, then we would have been able to move out the condition.

- Hen conditi				more out _ mor	
Parent Join	Business Object	Property Name	Field Name	Operator	Value
NoJoin	SalesDocument		xBoolean	Is True	
- And	SalesLineItem	LineItems	Item_Number	Equal	a100
Or	✓ SalesLineItem	LineItems	Item_Number	Equal	100XLG
And	SalesLineItem	LineItems	Item_Description	Equal	Green Phone

Business Rules can be exported to .xml files. Follow the steps below to export rules.

tules			
🜵 New Rule 🕌 Delete Rule	Copy Rule	ort Rules 😻 Im	port Rules
Rule Name	Business Object	Event	Enabled
Promo Buy 1 Get 1 Free	SalesDocument	PreSave	~
Promo Buy n Items Get 1 Free	SalesDocument	PreSave	-
Update line descriptions	SalesDocument	PreSave	~

Click the **Export** button. This will pop up up a small window from which the user can select the fields to export.

The window will show a list of available rules. The list can be filtered by Business Object using the dropdown on the top right-hand part of the screen.

ļ.		Select Busine	ss Rules to Export			×
S	elect All	Select None 🗰 Toggle Selection	Business Object:		•	
Sele	ect User Fiel	ds				_
	Selected	Business Object	Rule Name			
		SalesDocument	Promo Buy 1 Get 1 Free			
10		SalesDocument	Promo Buy n Items Get 1 Free			
		SalesDocument	Update line descriptions			
			[	Export	Cance	el

Select the rules to export by checking the box under the Selected column. The user can multi-select the table and click **Toggle Selection** to select/unselect multiple fields. The user has also the option to Select All or Select None.

Click **Export.** This will open up the Save As dialog box from which the user can browse the location and the give the name of the .XML file that is going to be saved.

<b>0</b>	Save As			×
€ 🦻 ד ↑ ]	≪ New Documentation → Business Rules →	~ C	Search Business Rules	P
Organize 👻 Ne	ew folder		<b></b>	0
Cases CLIENT_FILES Desktop Development Downloads Quote Reevalu Recent places Shared Folder	(draven) uation Rules			
File name:	Business Rules BACKUP			~
Save as type:	SalesPad BusinessRules (.BusRules.xml)			~
Hide Folders			Save Cancel	

## Importing Business Rules

Business Rules can also be imported from .xml files. Follow the steps below to import rules.

Click the **Import** button.

] Close 🛛 🍣 Refresh 🛛 🛃 Save						
tules						
🖶 New Rule 🕌 Delete Rule 🛛	🗅 Copy Rule 🛛 🐻 Exp	ort Rules 阙 Imp	ort Rules			
Rule Name	Business Object Event B					
Promo Buy 1 Get 1 Free	SalesDocument	PreSave	•			
Promo Buy 1 Get 1 Free Promo Buy n Items Get 1 Free	SalesDocument SalesDocument	PreSave PreSave				

8		Open		×
🔄 🏵 🕆 🕇 🚺 « M	lew Documentation 🔸 Busine	ess Rules → ∨ Ċ	Search Business Rules	Q
Organize 🔻 New fold	ler		■ -	0
<ul> <li>Tapco</li> <li>Time Docs</li> <li>Website Documents</li> <li>Libraries</li> <li>Documents</li> <li>Music</li> <li>Pictures</li> <li>Videos</li> </ul>	ation Rules	Business Rules BACKUP.BusRule S		
File	name: Business Rules BACKUP	P.BusRules 🗸	SalesPad BusinessRules (.BusRu	u v
			Open Cancel	

In the dialog box that appears, browse to the location of the rule's .xml file and click **Open.** 

The Select Business Rules to Import screen appears. Select the rules to import by clicking the check box under the Selected column.

		Select Busine	ss Rules to Import	-	. 🗆	×
5	Select All	Select None 🗰 Toggle Selection	Business Object:	-	_	
Se	lect User Fiel	ds				_
	Selected	Business Object	Rule Name			
		SalesDocument	Promo Buy 1 Get 1 Free			
		SalesDocument	Promo Buy n Items Get 1 Free			
	-	SalesDocument	Update line descriptions			
			I	mport	Cance	el

You can multi-select the grid view and click **Toggle Selection** to select/unselect multiple fields. You also have the option to Select All or Select None.

Once the fields to import have been selected, click **Import**. You will return to the Business Rules Maintenance form. The rules should now be part in the table.

**Note**: Imported rules are NOT saved automatically. You must click **Save** in order to save them. Because you are adding new rules, you will be required to restart SalesPad.

# **Examples of Business Rules**

Rule 1

Name: "Promo buy 1 get 1 free"

Description: If the customer is buying a specific item (A100), it will get another item (HD-60) for free. The promotion can be applied once per customer.

**Note:** This rule requires a User Defined Field at the Customer level. First import the UDF and then the Business Rule.

		Event	Enabled	Parent Join		Business Object	Property I	Name Field Name	Operator	Value
romo Buy 1 Get 1 Free	SalesDocument	PreSave		No3oin		Customer	Customer	xbrPromoCode 1	Is False	
				L. And		SalesLineItem	LineItems	Item_Number	Equal	A100
				Business Object	Property Name	Action	Apply To	Field Name	Value	
				SalesLineItem	LineItems	Create	Once	Item_Number	✓ HD-60	
				Customer	Customer	Update	N/A	Quantity	1	
				111201000000						

The part highlighted in orange shows you the item of the promotion. The part highlighted in yellow shows you the item that would be given for free. Note: other fields (such as description) can be added according to your needs.

#### Rule 2

Name: "Promo Buy n Items Get 1 Free"

Description: if the customer is buying a certain number (10 or more) of specific items (A100, 100XLG, and 256 SDRAM), it will get another item (HD-60) for free. The promotion can be applied once per customer.

**Note:** This rule requires a User Defined Field at the Customer level (included in the zip file). First import the UDF and then the Business Rule.

Jie Name	Business Object	Event	Enabled	Parent Join	Business Object	Property Name	Field Name	Operator	Value	Collection	Collection Operator			
			•											
fromo Buy n Items Get 1 Free	SalesDocument	PreSave	<b>v</b>	🛛 NoJoin	<ul> <li>Customer</li> </ul>	Customer	xbrPromoCode2	Is False						
					SalesLineItem	LineItems	Quantity	Greater Than Or Equal	10	•	Sum			
				And	SalesLineItem	LineItems	Item_Number	Equal	A 100					
				- Or	SalesLineItem	LineItems	Item_Number	Equal	100XLG					
				- Or	SalesLineItem	LineItems	Item_Number	Equal	256 SDRAM					
				: " New Effect	Perere Effect			: The New Parameter	Pelete Pa	ameter Da	er 🙀 Add Dynamic Value			
				Business Object	Property Name	Action	Apply To	Field Name		Value				
				SalesLineItem	LineItems	Create	Once	Item_Number	~	HD-60				
								Quantity		1				
								Unit_Price		0				

The part highlighted in blue defines the quantity criteria of the promotion. Note that "Collection" is checked and "Collection Operator" is 'Sum'; this means that the quantity of 10 will be counted on the children conditions (in this case all Item Number).

The part highlighted in orange is the list of items that are part of the promotion.

**Note:** The first condition has a "Parent Join" of 'And', whereas all the subsequent ones are 'Or'. The part highlighted in yellow shows you the item that would be given for free.

### Security

In order to create and maintain business rules, you must enable Business Rules Maintenance in the Security Editor. This is only for administrators and it is not required for the functionality to work. Rules will be applied to all users whether or not they have access to the maintenance form.

In order to run Business Rules, you must turn on "Enable Business Rules" in SalesPad Security Settings.

Note: This action requires you to log out and log back in.

Settings X			
🗂 Close 🛛 🖶 Save 🛛 🕃 Export Settings 👹 Import Settings 🐲 Export Settings List			
Filter:			
			_
Enable Business Rules	True		~
Crickle Dealmost Rules Auditing	Tuise		
Enable Business Rules			
Enables business kulles, tou will need to restart SalesPad to apply the effect. Defaults to 'False'.			
l			