Mission Control: Business Rules

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Business Rules

For information on how to set up a Workflow, please see this related article.

Business rules help ensure that documents are in the correct state before they are transitioned into another queue. In many cases, business rules are used to make sure that a document does not need any corrections or updates. They can also be used to add extra validation around any potential concerns for a given document, such as low margin.

Some examples of business rules that may be helpful are:

- Check for low margins on the document.
- Check for excessive discounts on a given line item.
- Check for any items that may be backordered.
- Check that all line items have been fulfilled before shipping.
- Check for any line item inconsistencies that could cause problems later in the process.

Setting Up Business Rules

To see or edit any existing business rules, or create new ones, click the Business Rules tab on the right hand side of the workflow setup screen. Within the Business Rules drawer, all of the current business rules will be displayed.

Clicking the “+” at the top of the drawer will open up the New Business Rule form. All fields on this screen are required. When setting a condition, the same functionality exists here as in the Workflow Queues. In addition, the queues where this rule should apply can be selected via a drop down menu.

In addition to the above items, at least one approver must be selected. This dropdown will populate with the users that are set up in the system, so that the user can select whoever must review and approve documents that have broken business rules. The list of approvers can vary for each business rule, which allows for maximum flexibility.

Emails can be automatically sent to the configured reviewers when documents break this business rule. Emails can also be automatically sent to the original user who submitted the document once it has been reviewed by one of these approvers.

After making all the necessary changes, users will need to click the “Publish Changes” button for the newly created or changed business rules to be put into place. Doing so will immediately make changes to which Business Rules are validated. There will be no need for any of the users to refresh their screens or log out to see these changes.

Any documents that are transitioned after the changes are published will be checked against the latest version of each Business Rule

Note: *There are no additional validation steps to publish a new/updated Business Rule. With this in consideration, only grant access to update the workflow and business rules to trusted members of the organization.*

Approving and Rejecting Business Rules

Once business rules have been set up, order entry personnel can submit a document for approval after they have completed all of the order entry details. To do so, the user can simply click the “Submit To” button:

After clicking the “Submit To” button, a Business Rules drawer will appear. In this drawer, the user can provide an explanation to the approver for why this document should move forward:

Clicking “Submit for Approval” will move this document out of the normal workflow and into a broken business rule queue. This queue can be seen at the top of the Mission Control dashboard.

The document can be approved or rejected in one of two locations:

- On Mission Control
- On the Document Edit screen

When approving a document on Mission Control, simply click the checkbox for the given document and then click the “Approve/Reject” link next to the document number.

Alternatively, the approver can enter the Document Edit screen and then click the “Approve/Reject” button.

Either way, the approver will be shown the Approval Process drawer and can make the decision to approve or reject any or all of the broken business rules. The comments submitted by the submitter will appear on this screen for additional rationale for why the document should be approved.

In the current state shown above, all of the business rules will either be approved or rejected. If the approver wants to approve one of the business rules and not the other, they can simply uncheck any rule that they do not want to approve and click the “Approve” button. The same logic applies for rejecting one or more of the broken business rules.

When a broken business rule is approved, an activity log of the approval will be created for the document, and it will then be moved to the next configured queue. If a broken business rule is rejected, it will be sent back into the current queue for the original person to update. In each of these cases, any notes added by the approver will be added to the document’s activity log.

Documents with Multiple Business Rules

In the above example, the document broke multiple business rules but only appeared in one of the approval queues.

This is the expected behavior. A document will reside in the highest-ranked broken business rule queue that has not been approved. This ranking order can be set on the Business Rules drawer found on the Workflows screen.

Automatic Actions

Automatic Actions help ensure that documents are moved through the workflow if they meet the criteria listed in the given queue, which helps reduce manual checks and reviews. This gives business owners more confidence that their workflows are moving orders through the pipeline, and it provides greater control to the entire process flow.

Below is an example of how Automatic Actions can enhance the business process:

- Documents that are waiting on items that have been backordered sit in a Backorder Queue.
- On a regular interval, checks are made to see if the backordered inventory has been received by the warehouse and can therefore be allocated.
- When the inventory is logged into the system, the next run of the Automatic Action will:
    - see the available inventory,
    - allocate those items to the orders that were waiting for them, and
    - then send them over to be picked.

Setting Up Automatic Actions

After clicking the Automatic Actions tab, which is located on the right hand side of the screen below the Business Rules tab, the user will see all automatic actions that have been previously created. Similar to business rules, clicking the “+” button will open up the New Automatic Action form.

On this screen, users will need to fill out the name of the automatic action and to which queues it will apply. When the automatic action is triggered, all documents that meet the outlined conditions will be transitioned to the next configured queue. This will allow for continued movement for documents that are waiting in a given queue but now meet the criteria to continue on in workflow.

Similar to any new or changed business rules, these changes will need to be saved and published before they take effect.

Example Automatic Action

Combining Automatic Actions and Alternate Path Actions can lead to a powerful processing engine that can allocate inventory, create a prepayment invoice, and authorize a credit card payment all in one action as the document sits in a “Waiting for Payment” queue. This could be accomplished by setting up the following in workflow:

Queue Setup:

Automatic Action Setup: