

Custom Rules (5.4)

Custom Rules enhances the validation and override capabilities of DGIS by giving Administrators the ability to create rules that will trigger certain actions during validation. Custom Rules can be used to communicate instances where shipments could be treated as partially regulated, advise certain actions to take, and automatically perform certain actions that are aligned with a company's practice and workflow.

Custom Rules are built using When, If, and Then criteria:

Edit Custom Rule

Name *

Description

When

Shipment is Validated ▾

If

+ Add Criteria + Add OR Group

Then

Display an error on the validation screen ▾

+ Add Action

Cancel Save

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When: The rule will always be set to trigger when the shipment is validated (clicking the Complete button).

If: Describes the conditions in the shipment that must be met to trigger the rule. The following can be added to the rule as additional criteria:

- Part number – User created Parts
- Material Profile – User created Material Profiles
- Regulation – supported regulation in DGIS
- Carrier – default or custom carrier
- Transport Mode – support transport mode in DGIS
- Limited Quantity – flag indicating Limited Quantity is or is not set
- Origin Country – Shipper Country
- Destination Country – Consignee Country
- Single Package – flag indicating Single Package is or is not set
- Inner Quantity (total) – total inner quantity set for the material; must be an integer
- Net Quantity – net quantity in the package; must be an integer
- Package Weight – package weight; must be an integer
- All Packed In One – flag indicating that materials are or are not packed in the same outer package
- Battery Cell Watt Hours - must be an integer
- Battery Watt Hours - must be an integer
- Battery Cell Content - must be an integer
- Battery Content - must be an integer
- Consignee Address – address selected from the Address Book
- Hazard Class – flagged if a shipment contains a material with the assigned hazard class

Then: Details the action that will take place when the rule is triggered. The following actions can be applied to the rule:

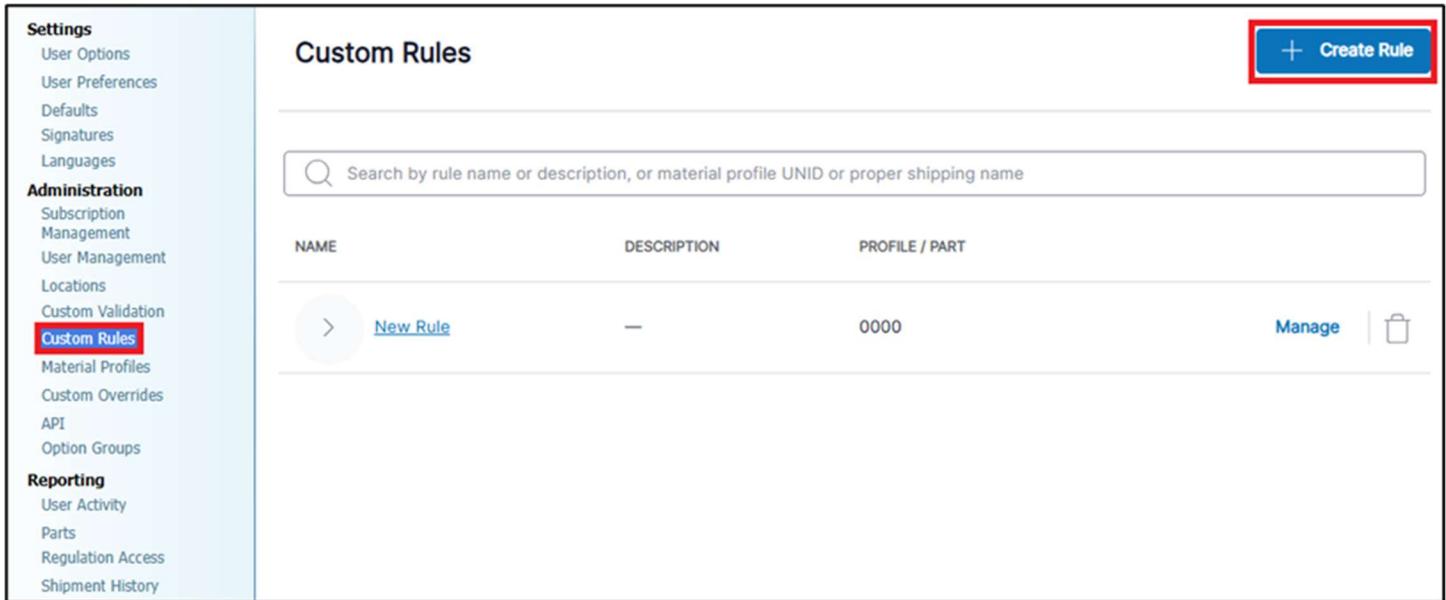
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- Display a warning on the validation screen – text will be presented to the user during validation (click Complete) along with other DGIS-generated warnings/errors. The text will be treated as a warning and will not stop the user from completing the shipment.
- Display an error on the validation screen - text will be presented to the user during validation (click Complete) along with other DGIS-generated warnings/errors. The text will be treated as an error and will stop the user from completing the shipment until the shipment is updated to not include criteria to trigger the rule.
- Populate fields in the shipment – information will be automatically added to one of the following fields when the rule is triggered:
 - Text will be added to the Additional Handling field
 - An Exemption Name and Exemption Type will be added as Authorization.
- Add a document to the shipment – a document is uploaded with a document name. This document will be associated with a shipment where the rule is triggered and will be available to print along with the shipping paper once the shipment is finalized.
- Downgrade the shipment – text will be presented to the user when finalizing the shipment (click Complete from the Current Shipment screen). Along with this text will be a message saying “Downgrade Available” which will give the user the option to accept the downgrade or continue the shipment as fully regulated:
 - Accept Downgrade – when presented this option, the shipment has met the conditions built in the custom rule to be treated as partially or non-regulated, and no shipping papers are required. If the user clicks the Accept Downgrade option, the shipment will be automatically archived to the History screen. There will always be a record of this shipment, showing with the Downgrade status, but there will be no way to print this shipment since it was downgraded (no shipping papers required). The user can click the plus sign of the shipment to view shipment details and Additional Documents. (There is an option to add a document when building the custom rule with the Downgrade the shipment action. If a document was added, the user will see it here and have the option to print it.)
 - Continue Regulated – If the user clicks this option, the shipment will be treated as fully regulated, even though it meets the downgrade criteria set in the custom rule. The user will be taken to the Print Shipment screen, where they can print the shipping paper along with the Additional Documents associated with the shipment.
- Override validation errors - text will be presented to the user during validation (click Complete) along with other DGIS-generated warnings/errors. The text will be treated as a warning along with any DGIS-generated errors and will not stop the user from completing the shipment.

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Create a new rule

1. On the Custom Rules screen under the Administration tab, click Create Rule



The screenshot shows the 'Custom Rules' screen within the 'Administration' tab. On the left, a sidebar lists various settings and administration options. The 'Custom Rules' option is selected and highlighted with a red box. The main area is titled 'Custom Rules' and contains a search bar and a table. The table has columns for 'NAME', 'DESCRIPTION', and 'PROFILE / PART'. A single row is visible, showing 'New Rule' in the NAME column, an empty field in DESCRIPTION, and '0000' in PROFILE / PART. To the right of this row are 'Manage' and 'Delete' buttons. A large blue button labeled '+ Create Rule' is located in the top right corner of the main area, also highlighted with a red box.

2. Enter a name in the Name field.



The screenshot shows the 'Edit Custom Rule' dialog box. On the left, a sidebar lists various settings and administration options, with 'Custom Rules' selected. The main area is titled 'Edit Custom Rule' and contains two text input fields. The first field is labeled 'Name *' and is highlighted with a red box. The second field is labeled 'Description'. In the top right corner of the dialog box are 'Cancel' and 'Save' buttons, with the 'Save' button also highlighted with a red box.

3. In the If section, to add more criteria for the rule, click Add Criteria. This will allow the Administrator to add more conditions that must be true in order to for the rule to trigger. To add criterial where one or another condition can be met in order to trigger the rule, click Add OR Group.

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If

Part: 0000

AND

[+ Add Criteria](#) [+ Add OR Group](#)

4. When adding other criteria, select one of the options from the dropdown, select one of the operators, and select the desired option or enter the desired text in the available textbox.

If

Part: 0000

AND

Regulation = International Air

AND

[+ Add Criteria](#) [+ Add OR Group](#)

5. In the Then section, select the desired action and add the appropriate text and documents, when applicable.

Then

Display a warning on the validation screen This is a warning

[+ Add Action](#)

6. Click Save to save the custom rule.

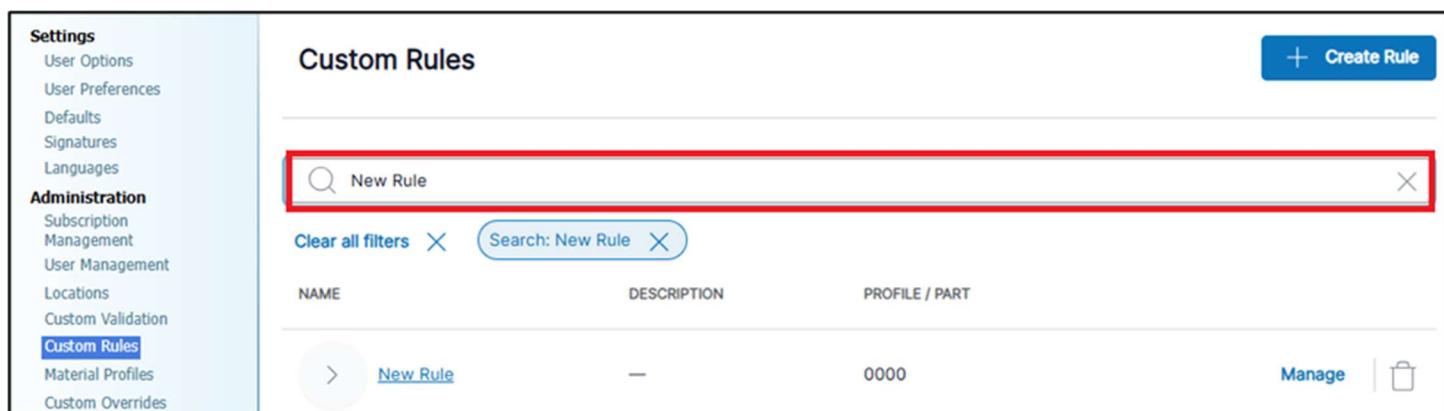
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The screenshot shows the 'Edit Custom Rule' interface. On the left, a sidebar menu lists 'Settings' (User Options, User Preferences, Defaults, Signatures, Languages), 'Administration' (Subscription Management, User Management, Locations, Custom Validation, **Custom Rules**), and 'Material Profiles'. The 'Custom Rules' option is selected and highlighted with a blue box. The main area is titled 'Edit Custom Rule' with 'Cancel' and 'Save' buttons. The 'Name *' field contains 'New Rule' and has an 'X' button to clear it. The 'Description' field is empty.

Search Custom Rules

1. On the Custom Rules screen under the Administration tab, type in the search box to filter down to the desired Custom Rule. You can search by the rule name, description, material profile UNID, or proper shipping name.

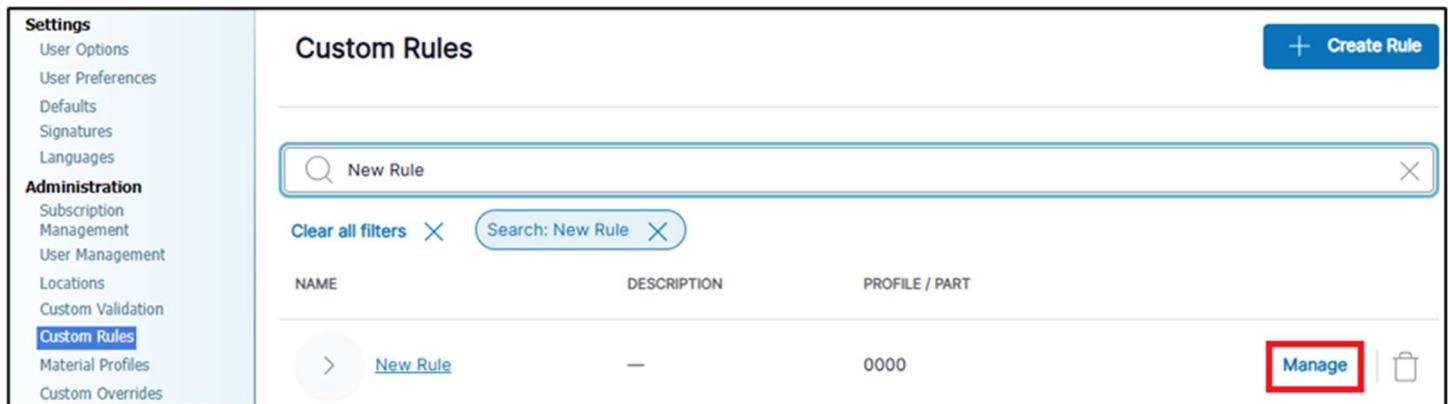


The screenshot shows the 'Custom Rules' search results screen. The sidebar menu is identical to the previous screenshot. The main area is titled 'Custom Rules' with a 'Create Rule' button. A search bar at the top contains 'New Rule' and has a magnifying glass icon and an 'X' button. Below the search bar are 'Clear all filters' and 'Search: New Rule' buttons. A table lists rules with columns: NAME, DESCRIPTION, and PROFILE / PART. One rule is listed: 'New Rule' (NAME), '-' (DESCRIPTION), '0000' (PROFILE / PART). There are 'Manage' and 'Delete' buttons to the right of the rule row.

Edit Custom Rule

1. On the Custom Rules screen under the Administration tab, search for the desired rule and click Manage.

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The screenshot shows the 'Custom Rules' screen. On the left, a sidebar lists 'Settings' (User Options, User Preferences, Defaults, Signatures, Languages) and 'Administration' (Subscription Management, User Management, Locations, Custom Validation, **Custom Rules**, Material Profiles, Custom Overrides). The 'Custom Rules' item is selected. The main area is titled 'Custom Rules' with a 'Create Rule' button. A search bar at the top says 'New Rule'. Below it are 'Clear all filters' and 'Search: New Rule'. A table lists rules with columns: NAME, DESCRIPTION, PROFILE / PART. One rule is shown: 'New Rule' (NAME), '-' (DESCRIPTION), '0000' (PROFILE / PART). The 'Manage' button for this rule is highlighted with a red box.

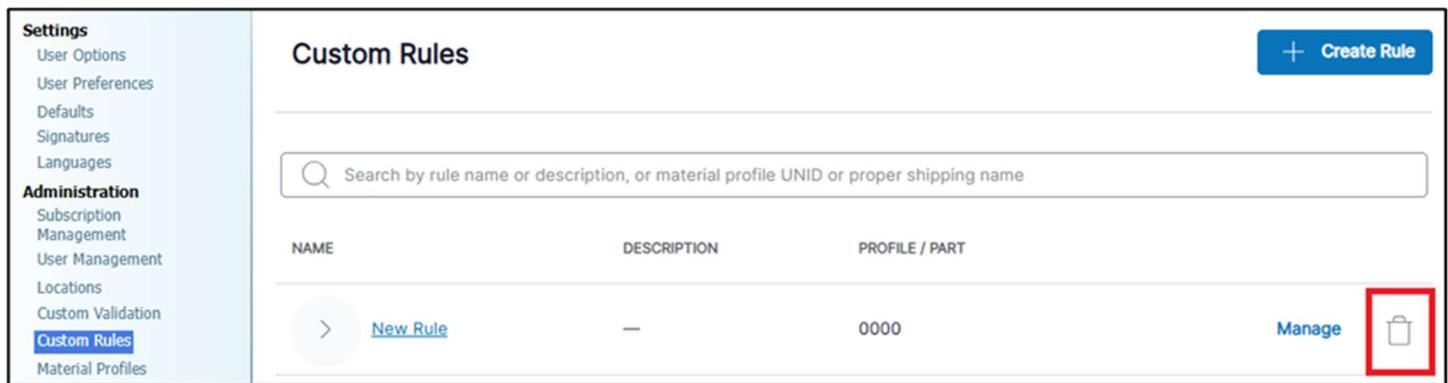
2. Make the appropriate changes on the Edit Custom Rule screen.
3. Click Save to save the changes to the rule.



The screenshot shows the 'Edit Custom Rule' screen. On the left, a sidebar lists 'Settings' and 'Administration' (Subscription Management, User Management, Locations, Custom Validation, **Custom Rules**, Material Profiles, Custom Overrides, API, Option Groups). The 'Custom Rules' item is selected. The main area is titled 'Edit Custom Rule' with buttons for 'Cancel', 'Save' (highlighted with a red box), and 'Delete'. It has fields for 'Name *' (containing 'New Rule') and 'Description'.

Delete Custom Rule

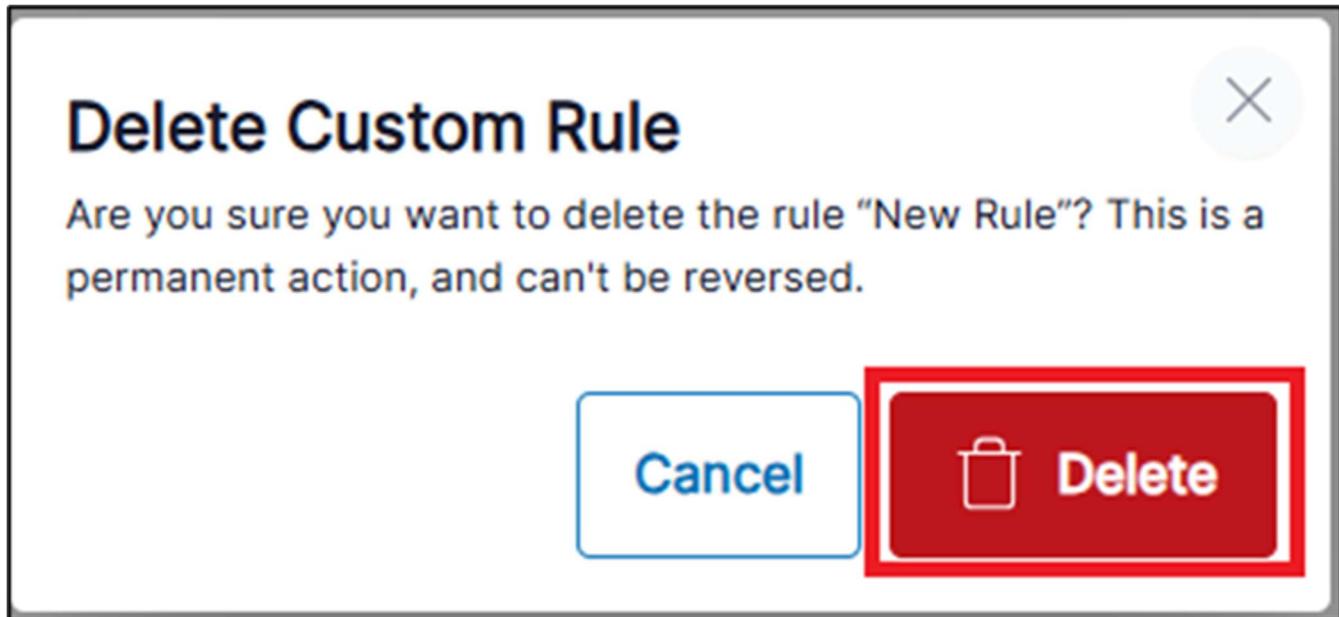
1. On the Custom Rules screen under the Administration tab, search for the desired rule and click the icon to delete the rule.



The screenshot shows the 'Custom Rules' screen. On the left, a sidebar lists 'Settings' and 'Administration' (Subscription Management, User Management, Locations, Custom Validation, **Custom Rules**, Material Profiles). The 'Custom Rules' item is selected. The main area is titled 'Custom Rules' with a 'Create Rule' button. A search bar at the top says 'Search by rule name or description, or material profile UNID or proper shipping name'. A table lists rules with columns: NAME, DESCRIPTION, PROFILE / PART. One rule is shown: 'New Rule' (NAME), '-' (DESCRIPTION), '0000' (PROFILE / PART). The trash icon for this rule is highlighted with a red box.

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2. Click Delete to confirm the deletion.



3. From the Edit Custom Rule screen, you can also delete the rule by clicking Delete.

A screenshot of the "Edit Custom Rule" screen. On the left is a sidebar with "Settings" and "Administration" sections. The "Custom Rules" item in the "Administration" section is highlighted with a blue border. The main area has a title "Edit Custom Rule" and three buttons: "Cancel", "Save", and a red "Delete" button with a trash can icon. Below these buttons is a "Name *" label with a text input field containing "New Rule". Underneath is a "Description" label with a text input field.