

# Rule-based next process step: routing documents to Custom Processing

## Audience

This guide is intended for developers and implementers who use DEXPRO SQUEEZE in Business Central and want to control, **before** the actual "[Custom Processing](#)" implementation, **which** documents should switch to the "**Custom Processing**" status after validation.

## Context (comes *before* the existing Custom Processing guide)

With this configuration you ensure that a document (depending on rules) is given the "**Custom Processing**" status. **From that point on**, the flow for custom processing described in the existing documentation takes over ([creating target documents from "JSON Processed"](#)).

Further reading (next step, after this documentation):

- [Creating custom documents \(Custom Processing\)](#)

## UI terms used

The following terms correspond to the field captions used in the app:

- "**Custom Processing**" = DXP Document Status / Custom Processing
- "**Next Process Step**" = Next Process Step
- "**Standard document**" = enum value Standard document
- "**Rule Set**", "**Rule Set Code**" = Rule Set, Rule Set Code
- "**Rule Group**", "**Rule Group Code**" = Rule Group, Rule Group Code

# Technical background

- There is one **document class setup** (DXP Document Class Setup) per **document class**.
- A SQUEEZE rule set is created automatically for each document class setup (internally: field "**DXP Sqz Rule Set Code**").
- A **rule group code** is stored in the document class setup (internally: field "**DXP Sqz Next Step Rule Group**").
- When the next process step is determined, the rules of this rule group are evaluated.
- If a rule matches and
  - **Next Process Step** = "**Standard document**" and
  - **Custom Processing** = **Yes**, then the document status is set to "**Custom Processing**".

Important:

- If **no** rule group is stored or **no** rule matches, the system falls back to the default "Next Process Step" value from the document class setup.

## Prerequisites

- DEXPRO Core and DEXPRO SQUEEZE are installed.
- You have access to the **Document Class Setup** (DXP Document Class Setup) page as well as the rule engine pages (rule groups / rules).

## Step by step: creating and linking the "DXP Sqz Next Step Rule Group" rule group

### 1) Open the document class setup

1. Open the **Document Class Setup** page.
2. Select the document class for which you want to enable routing to "**Custom Processing**".
3. Scroll to the **Squeeze** area → **Rules** group.

{add screenshot of Document Class Setup - Squeeze Rules here}

## 2) Create the rule group

1. In **Squeeze → Rules**, select the "**Next Process Step**" field (technically: *DXP Sqz Next Step Rule Group*).
2. Open the **lookup** (rule group list).
3. Create a new **rule group**:
  - **Rule Group Code**: for example `Next Step Rules`
  - **Description**: for example "Routing to Custom Processing"

Note: The lookup is already filtered to the matching **rule set code** by the document class. You do not need to search for the rule set manually.

{add screenshot of rule group lookup here}

## 3) Save the rule group in the document class setup

1. Make sure that the "**Next Process Step**" field in the document class setup now contains the rule group code `DXP Sqz Next Step Rule Group`.

{add screenshot of document class setup with rule group code here}

# Step by step: creating a rule that routes to "Custom Processing"

## 4) Open the rules of the rule group

1. Open the **rule group** `DXP Sqz Next Step Rule Group` you just created.
2. Choose the "**Show Rules**" action (opens the rules of this rule group).

{add screenshot of Show Rules action here}

## 5) Create a new rule

1. Create a new **rule**.
2. Set a meaningful **priority** (lower value = higher priority, if your environment is configured that way).
3. Define the **conditions** (rule conditions) that must match.

[Best Practice] Start with a very clear, testable condition (for example based on document type, vendor, amount thresholds, company, etc.) before you build complex rule chains.

{add screenshot of new rule here}

## 6) Set the SQUEEZE-specific fields (decisive for "Custom Processing")

On the rule card there is a "**DEXPRO Squeeze**" area (CardPart). Set the following there:

1. **Next Process Step** = "**Standard document**"
2. **Custom Processing** = **Yes**

Result:

- When this rule matches, the document status is set to "**Custom Processing**".

{add screenshot of rule card DEXPRO Squeeze area here}

Optional:

- **Account Assignment Code** (if you additionally want to control account assignment logic via rules; independent of the Custom Processing routing).

## Checks / troubleshooting

### The document does *not* end up in "Custom Processing"

Work through these points:

1. **Is the rule group stored?** The rule group code must be set in the document class setup (otherwise the system falls back to the default "**Next Process Step**").
2. **Does a rule match?** If no rule matches, the next process step is not overwritten.
3. **Is "Custom Processing" set AND Next Step = "Standard document"?**
  - If "Custom Processing" = Yes but Next Step  $\neq$  "Standard document", the status is not set to "Custom Processing".
4. **Can you not see the "DEXPRO Squeeze" area on the rule card?**
  - Then you are most likely in a rule set that does not belong to the document class setup (source table).

- It is best to create the rule group via the lookup from the document class setup. This saves you the detour via the general rule management.

## The document ends up in "Done" instead of "Custom Processing"

If a rule matches and **Next Process Step** is set to a value other than "Standard document", the status may be set to "**Done**" (which skips further processing). Therefore check the Next Step selection in the rule. This is the case, for example, when the [Breeze Interface](#) app is used.

## Afterwards (transition into the existing [documentation on custom document creation](#))

As soon as a document is in the "**Custom Processing**" status, it is ready for processing:

- Read "JSON Processed" from DXP Document
- Create target documents
- Set the final status

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