# Task 15: Documenting Business Rules in Freshservice

Because Freshservice does not currently support exporting Business Rules, manual documentation becomes essential. This task outlines a best-practice method for recording each rule using a structured template—preferably in JSON-style formatting—for clarity and long-term maintainability.

Business Rules are form-level logic that determine how fields behave—what gets shown, hidden, made mandatory, or pre-filled—based on context. Documenting them helps ensure transparency, simplifies troubleshooting, supports auditability, and provides a reusable structure for cross-team understanding or sandbox migration.

This is merely a sample of what can be achieved with JSON documentation and is not an exact replica of an exported business rule (which cannot currently be exported).

# Recommended Documentation Format

Use this format to document each rule:  
  
{  
 "name": "BR – Show VPN Fields",  
 "module": "Service Request",  
 “service item”: "Catalog Item: VPN Access",  
 "applies\_to": “Agents”,  
 “execute on”: “Edit Form”,  
 "description": "Displays only VPN-related fields when the category is set to VPN.",  
 "conditions": [  
 {"field": "Category", "operator": "equals", "value": "VPN Access"}  
 ],  
 "actions": [  
 {"action": "show", "field": "VPN Type"},  
 {"action": "require", "field": "Justification"}  
 ]  
}

# Sample Business Rules

Example 1: VPN Access Rule

{  
 "name": "BR – Show VPN Fields",  
 "module": "Service Request",  
 "applies to": "Catalog Item: VPN Access",  
 "description": "Displays VPN-specific fields when the category is VPN Access.",  
 "conditions": [{"field": "Category", "operator": "equals", "value": "VPN Access"}],  
 "actions": [  
 {"action": "show", "field": "VPN Type"},  
 {"action": "require", "field": "Business Justification"}  
 ]  
}

Example 2: Hide Asset Fields for HR

{  
 "name": "BR – Hide Asset Info for HR",  
 "module": "Incident",  
 “service item”: "all items",  
 "applies to": “Requesters”,  
 “execute on”: “New Form”,  
 "description": "Hides asset-related fields when the requester is in the HR department.",  
 "conditions": [{"field": "Department", "operator": "equals", "value": "HR"}],  
 "actions": [  
 {"action": "hide", "field": "Asset Tag"},  
 {"action": "hide", "field": "Device Serial Number"}  
 ]  
}

Example 3: Set Default Priority for Legal Requests

{  
 "name": "BR – Set Priority for Legal",  
 "module": "Service Request",  
 “service item”: "Catalog Item: VPN Access",  
 "applies to": “Agents and Requesters”,  
 “execute on”: “New Form and Edit Form”,  
 "description": "Automatically sets the priority to High when Legal is selected as the department.",  
 "conditions": [{"field": "Department", "operator": "equals", "value": "Legal"}],  
 "actions": [  
 {"action": "set\_default", "field": "Priority", "value": "High"}  
 ]  
}