Genesys Rules Authoring Tool Help

Creating Linear Rules

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Follow these steps to create a linear rule:

1. Navigate to the rule package to which the new rule will belong in the **Explorer Tree** (verify that you have selected the correct Tenant from the Tenant drop-down list). Navigate to the correct node of the business structure under the rule package, which will define the node at which your linear rule will be created. If you create the linear rule at the rule package level, it will be a global rule. Select the node in the Explorer Tree and click on the **Rules** tab.
2. Click **New Linear Rule**.
3. In the **Rule Summary**, the **ID** field is populated automatically. It cannot be edited.
4. Enter a **Name** for the rule (for example, `Gold`).
5. Enter a brief **Description** for the rule (for example, If the customer is a Gold member, then increase the priority).
6. Select the **Phase** at which this rule will be applied (classification, prioritization, or archiving for iWD. Refer to the Genesys Rules System Deployment Guide for more information about phases).
7. Select the **Business Calendar** to use with this rule (optional).
8. The **Pending Snapshot** field is displayed with a tick symbol indicating that the contents of this rule have not yet been included in a package snapshot. See Deployment for details of how to work with snapshots.
9. Enter a **Start Date** and an **End Date** for the rule (optional). If the **End Date** is earlier than the current date, the rule is marked with a flag () to indicate that the rule is out of date.
10. In the lower panel, fill in the **When** and **Then** rows.
    a. To add a Condition (When), click **Add Condition** and select from the list (for example, a condition for this scenario might be `When the customer is a Gold member`). The rule condition includes the name of the rule template from which the condition is derived.
    b. To add an Action (Then), click **Add Action** and select from the list (for example, an action for this scenario might be `Increase the priority by 100`). The rule action includes the name of the rule template from which the action is derived.
    c. Insert values for the parameters into the table under the **Condition** and **Action** columns. Depending on how the parameters were configured by the rule template developer in GRDT, there may be constraints on the values that can be entered.
11. Click **Validate** to validate the syntax of the linear rule. The **Validate** option appears in the drop-down located in the lower left side of panel.
12. Click **Save** to save your changes.

> ## Important
> When you make any modifications to the body of a rule, you "lock" the rule, which prevents others from being able to make changes to the same rule at the same time. The unsaved icon will appear on the rule summary to alert you that you need to save your changes. For any other user, the locked icon appears on the rule

> summary and the Save and Cancel buttons are disabled. In addition, other users are unable to make changes to the rule because it is marked "read only".

When editing rules, be careful not to clear your browsing history or cookie data, as this might cause the rule to be stuck in a locked state. Unsaved changes could be lost.