

Rule Builder window

Use Rule builder to create or change a rule set.

Toolbar

New Rule Set  , **Open**  , **Save**  , **Cut**  , **Copy**  , **Paste**  , **Undo**  , **Redo** 

Add Rule  adds a blank **Action** to the selected rule. If nothing is selected, it adds a new rule with a blank **Event** and a blank **Action**.

Insert Rule  adds a blank **Action** icon after the selected icon or line.

Delete  deletes the selected icons.

Edit Rule  opens the Rule Parameters Editor for an event-action pair that already has values set.

Tabs

The tabs in the left pane display icons that you can drag to the workspace in the right pane.

- The **Events** tab displays events that you can use in a rule set. Drag an event from this tab to the workspace.
- The **Flow** tab displays flow actions, such as **Branch**, that you can use in a rule set to control rule flow.
- The **Actions** tab displays actions that you can use in a rule set.

If  appears next to an event icon on the **Events** tab, you can add the event to a rule set. Otherwise, the icon represents a group of events. Expand the group to select a specific event to add to the rule set.

To search a tab for a specific event or action, click the first line in the tab (for example, **Prinergy Events**) and type the name of the event or action you want to find. As you type, the tab pane scrolls down to the first occurrence of those letters.

For information about an item, right-click and select **What Is This?** The RBA Reference opens with information about the specific item.

Workspace

Displays a rule set as icons. In this pane, you can add, move, and delete the available event, action, and flow icons to create or change a rule set.

You can change the descriptions of icons.

The events that an action results in appear to the right of the action. The icons for the resulting events have the following meanings:

-  means the action can cause this resulting event 0 or 1 times
-  means the event occurs 0 or more times
-  means there are more than two resulting events; hover to see them

Using your mouse, you can control how the rule set appears in the workspace:

- If your mouse has a scroll wheel, scroll the rule set up and down using the mouse wheel.
- Zoom in and out on the rule set by scrolling the mouse wheel while pressing the Ctrl key.
- Pan to a different area of the rule set by moving the mouse while pressing the left mouse button and the Ctrl key.

You can also zoom and pan the rule set by using the Zoom & Pan floating window, which you open by selecting **View > Zoom & Pan**. The Zoom & Pan window displays the entire rule set. Use the slider bar to adjust the zoom (size of contents) within the workspace. Drag the green square to pan to a different part of the rule set in the workspace.