Conversation Rules Templates Guide

Getting Started

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Importing the CM Template and Sample Rules Package

1. Install GRS as described in the **GRS Deployment Guide** (opens a new document).

2. Log into GRAT.

3. Navigate to the required solution in the left navigation pane.

4. Click the **Import Templates** button.

5. Browse to the template file—`cm_template.xml`—which will be in the **Examples** folder in the default installation directory unless you specified another location when you installed it. Click **Import**.

6. A prompt indicates whether or not the import succeeded. When the import is complete, you will see on the **Import Template** dialog a new template called **CM_Standard_Rules.**

7. From the **CM Examples Solution** folder, browse to the CM Sample Package file —`cm_sample.xml`. Click **Import**.

8. Give the sample rules package a suitable **Package Name** and **Business Name** for your purposes. See also importing a rules package.

The template is now available for selection when you create a rules package, and the sample rules package is available to work with.

You now have available, via the drop-down menus in GRAT, a fully defined set of ready-made Conversation Manager-specific Conditions and Actions. Full detailed listings of these are provided in **Conditions** and **Actions**.