# List Builder

## Printable Help

Version 2022 R2

Last updated November 01, 2022


### Abstract

This document is a printable version of List Builder help.



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# Introduction to List Builder

List Builder interfaces with the Latitude database to allow you to generate call lists for dialer campaigns using an elaborate querying tool. You can provide the call lists to your integrated Latitude by Genesys dialer vendors. When a campaign starts, the dialer calls the parties on the call list and, when connected, routes the calls to collectors.

Latitude can run List Builder in a "quiet" mode, with no user interface, from a Windows Task Scheduler command script. A command-line argument added to List Builder accepts a string, which is a set of saved dialer configuration settings as stored in the Latitude policy objects. The argument allows you to direct List Builder to generate and export a dialer call list. You can import the list into a dialer and use it to create a dialer campaign.

**Related Topics**

What's New in List Builder

Log on to List Builder

Help Overview

## What's New in List Builder

The following releases introduced changes and enhancements in List Builder.

### 2022 R1

#### Fetching non-agent calls into communication panel:

Dialer update service pulls any non-agent handled calls into Latitude and is displayed in the communication panel. It also increments any attempt or contact counters based on a result code mapping and its properties (attempted/contacted). If the mapping is resolved into a Wrong Number (WN) in Latitude, the phone number is marked as bad. It will also log "Party Phone Number Attempted," "Party Phone Number Changed," and "Campaign Call Dispositioned" events as appropriate.

#### Screen pop-up upon inbound call received:

This pops-up account upon inbound call received from Genesys Cloud by matching ANI. If the ANI matches with two accounts, it shows the list of matching accounts like search results and allows the agent to select an account to be opened. If those accounts are linked together; it launches the driver account. If ANI is not matched with any account, the agent can search for an account from the search screen as per the conversation with the caller.

#### Remove phone number from current contact list/campaigns:

This removes the phone number from the current contact list/campaigns in real time when a disposition is stamped or by performing an action that results in the account being flagged as worked.

#### List builder - Exit form between the process:

This enables you to exit the campaign creation form in the List builder while exporting accounts to Genesys Cloud at any point in the process.

#### List builder - Auto time zone-mapping configuration:

This enables you to enable auto-time zone mapping provided by Genesys Cloud by viewing the area code/zip code while creating a contact list. For more information on this feature, refer to: https://help.mypurecloud.com/articles/automatic-time-zone-mapping-overview.

#### List builder - Contactable time sets configuration:

This enables you to set a contactable time set by supplying the timezone from Latitude and selecting one of the contactable time sets from Genesys Cloud while creating a campaign. Note: You cannot use this feature if "Auto time zone mapping" is enabled. For more information about this feature, please refer to: https://help.mypurecloud.com/articles/callable-times-page.

### 2020 R1

**Added ability to export call lists to Genesys Cloud campaigns. For more information, see Export Call List to Genesys Cloud Campaign.**

### 2020 R2

**Modified ability to export call lists to Genesys Cloud campaigns to a wizard form. For more information, see Export Call List to Genesys Cloud Campaign.**

**Related Topics**

**Introduction to List Builder**

**Log on to List Builder**

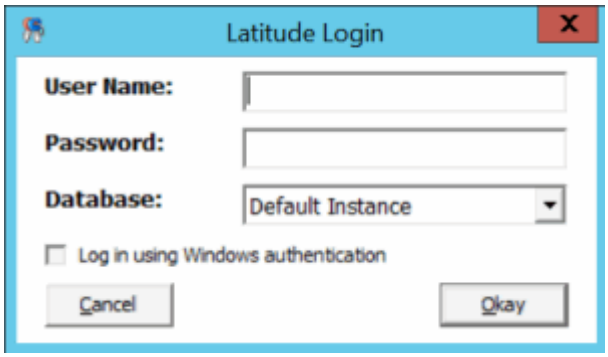
**Help Overview**

## Log on to List Builder

Use the **Latitude Login** dialog box to log on to List Builder.

**To log on to List Builder**

1. Open “\Program Files (x86)\Interactive Intelligence\Interaction Collector\bin.”
2. Click "ListBuilder." The **Latitude Login** dialog box appears.

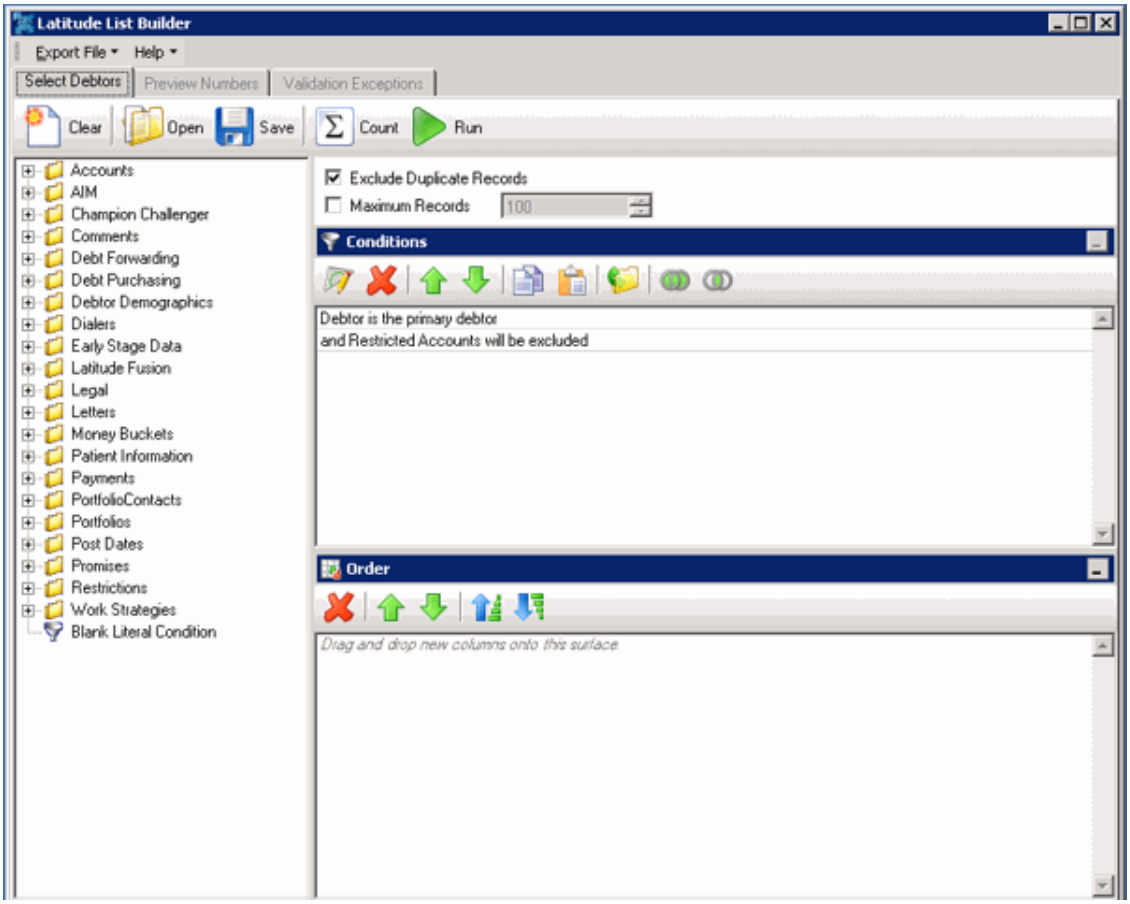



**User Name:** Your Latitude user name.

**Password:** Your Latitude password. As you type your password, the system displays periods instead of the typed characters.

**Note:** To log on using Windows authentication, select the Log in using Windows authentication check box and provide your Windows user name and password.

3. Complete the information and then click **Okay**. The **Latitude List Builder** window appears.




**Related Topics**

What's New in List Builder

Introduction to List Builder

Help Overview

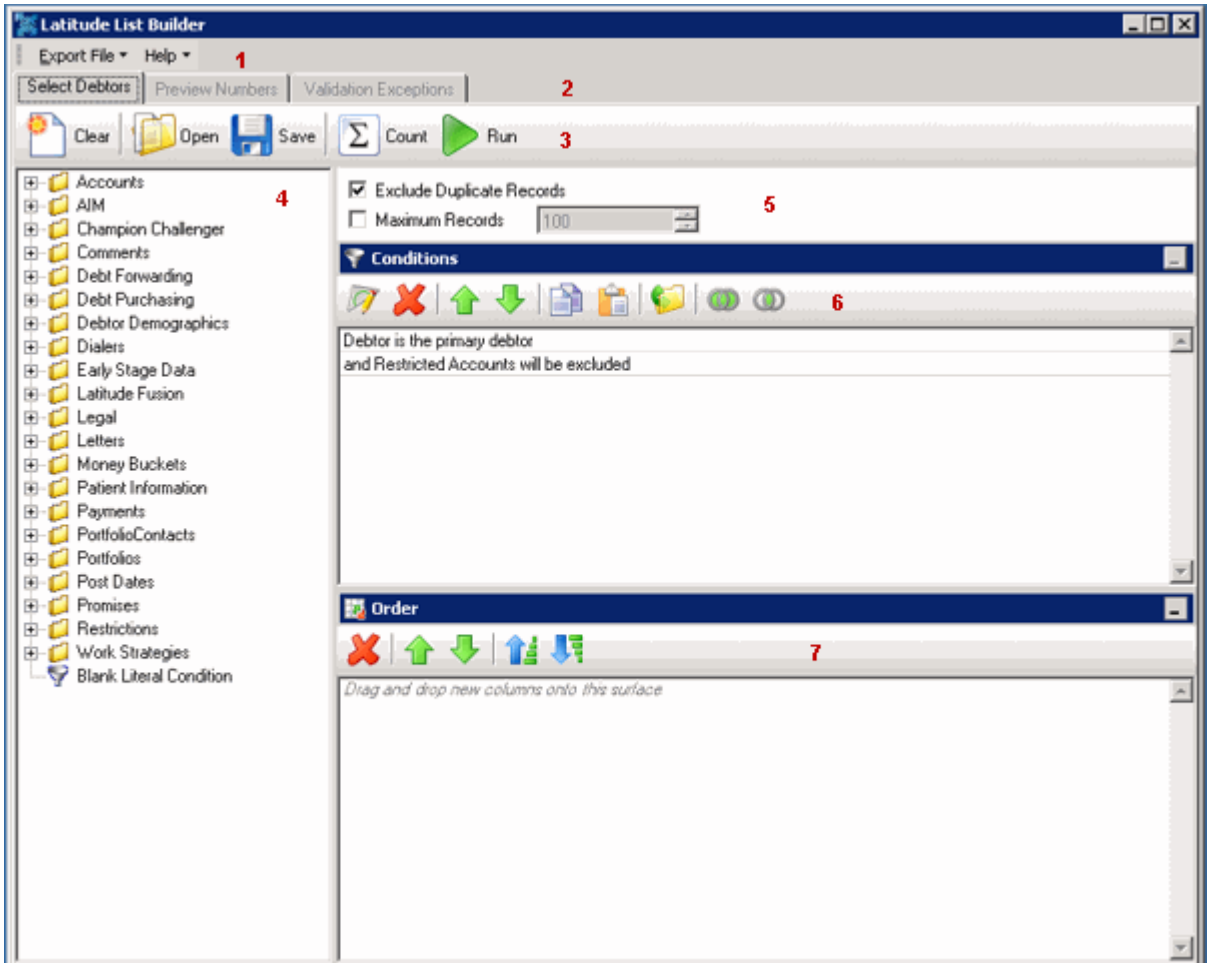
GENESYS

Feedback

## Queries

Queries allow you to retrieve accounts that meet specific criteria. You can run a query to view, sort, group, and summarize the query results before implementing the query. The system includes two default conditions: "Debtor is the primary debtor and "Restricted Accounts will be excluded."

**Note:** You can open a query that a user created using the Account Analysis tool in Latitude and run it in List Builder.




1. **Menu bar:** Displays options for using List Builder.
2. **Tabs:** Displays the tabs for creating and modifying queries, and viewing the results.
3. **Query Toolbar:** Displays the functions that are available for the query.
4. **Data Selection pane:** Displays the data available to set as conditions.
5. **Options:** Displays options to apply to the query.
6. **Conditions pane:** Displays the conditions for retrieving accounts.
7. **Order pane:** Displays the sort order for the query results.

**Related Topics**

Query Conditions

Query Order

Query Results

## Query Conditions

### Query Conditions

Use the **Conditions** pane in the **Latitude List Builder** window to specify the criteria for data to include in the query results.

**Related Topics**

Create a Query Condition

Modify a Query Condition

Copy a Query Condition

Group Query Conditions

Modify the Query Condition Order

Set a Query Condition to Optional or Required

Delete a Query Condition

Boolean Operators

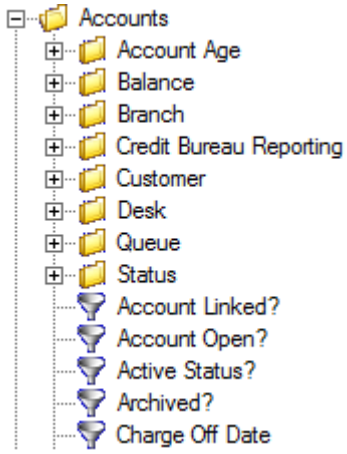
Query Condition Types

### Create a Query Condition

Use the **Conditions** pane to specify the criteria for which data to include in the query results. Queries contain a default condition to include only the accounts that an outside collection agency or attorney doesn't hold. You cannot delete this condition.

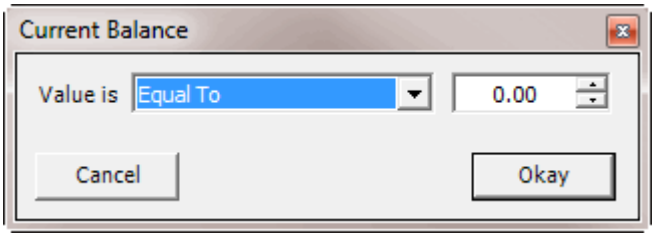
**To create a query condition**

1. In the **Data Selection** pane, click the plus sign (**+**) next to a folder to expand it.

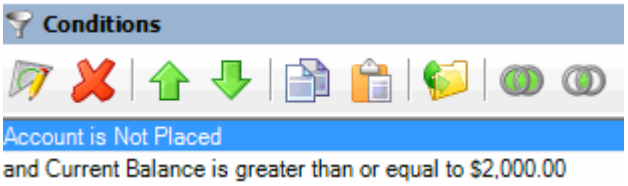



2. Click the data item for which to set a condition and drag and drop it in the **Conditions** pane. A dialog box appears, which allows you to specify the criteria. The title of the dialog box and the information displayed depend on the condition selected.

   The following example shows the **Current Balance** dialog box that appears when you drag and drop the **Current Balance** data item into the **Conditions** pane.




3. In the dialog box, specify the criteria and then click **Okay**. The condition appears in the **Conditions** pane. In the following example, the condition indicates you want to include in the query results accounts with a current balance that is greater than or equal to "$2,000."




4. Continue specifying conditions as necessary.

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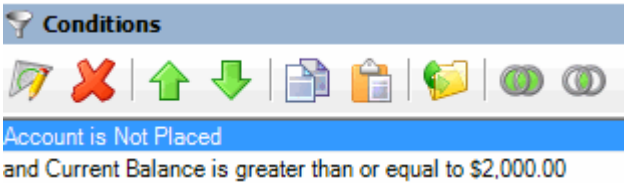
## Modify a Query Condition

Use the **Conditions** pane to modify a query condition.

**To modify a query condition**

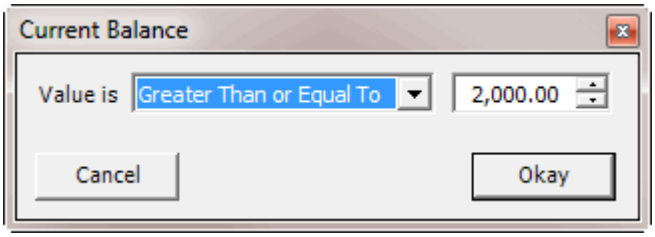
1. Go to the **Conditions** pane.



2. Do one of the following:

- Click a condition and then, in the toolbar, click the Edit icon.
- Double-click a condition.
- Right-click a condition and then click **Edit**.

A dialog box appears, which allows you to modify the criteria. The title of the dialog box and the information displayed depends on the condition selected.




3. In the dialog box, modify the criteria and then click **Okay**. The **Conditions** pane reflects the update.

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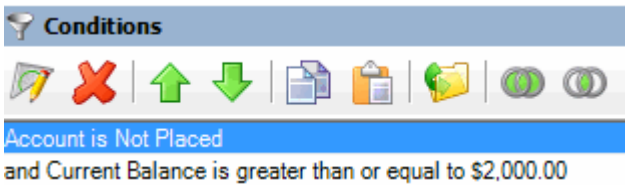
## Copy a Query Condition

Use the **Conditions** pane in a query window to copy a query condition.

**To copy a query condition**

1. Go to the **Conditions** pane.




2. Do one of the following:

- Click the condition and then, in the toolbar, click the Copy icon.
- Right-click the condition and then click **Copy**.

The system copies the condition to the Clipboard.

3. In the **Conditions** pane, do one of the following:
4. Click where you want to copy the condition and then, in the toolbar, click the Paste icon.
5. Right-click where you want to copy the condition and then click **Paste**.

The system pastes the condition in the specified location.

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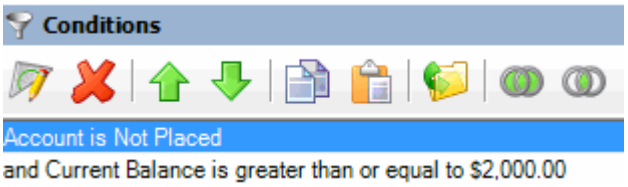
## Group Query Conditions

Use the **Conditions** pane to separate conditions into groups when you require complex data mining.

**To group query conditions**

1. Go to the **Conditions** pane.



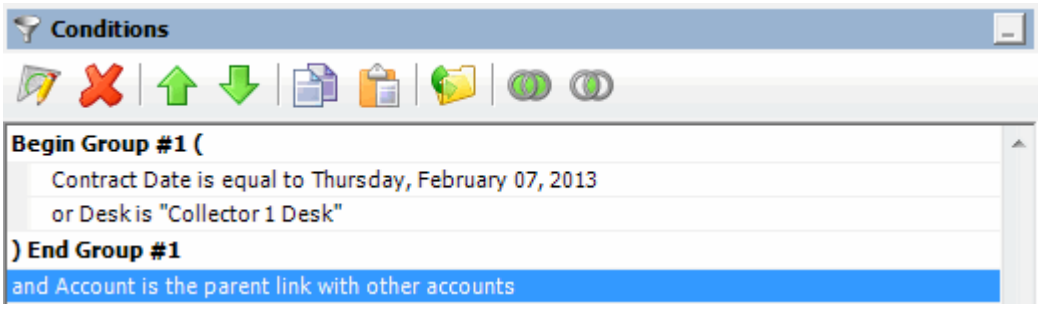

2. Click the conditions to group.

**Tip**: To select multiple sequential conditions, press and hold the **Shift** key and click the first and last sequential condition. To select multiple non-sequential conditions, press and hold the **Ctrl** key and click each individual condition. To select all conditions, right-click and then click **Select All**.

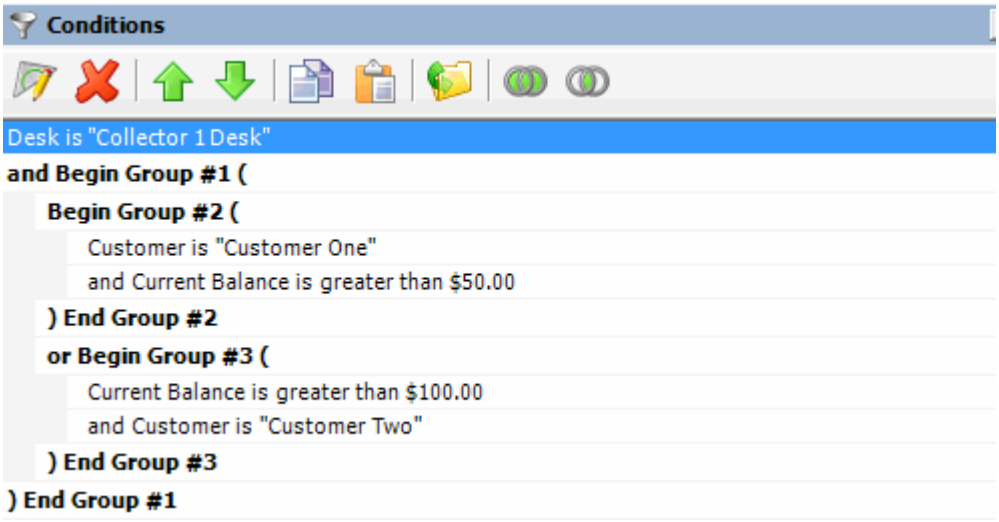
3. Do one of the following:

- In the toolbar, click the Group icon.
- Right-click the selected conditions and then click **Group**.

The system groups the selected conditions and identifies the beginning and ending of the group.




4. Continue grouping conditions as necessary. The following example shows a complex grouping of conditions.



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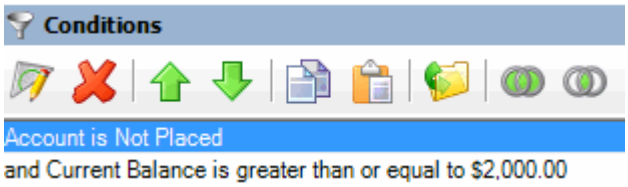
## Modify the Query Condition Order

Use the **Conditions** pane to modify the order in which to evaluate conditions.

**To modify the query condition order**

1. Go to the **conditions** pane.




2. To move up a condition in the list, click the condition and then, in the toolbar, click the up arrow.
3. To move down a condition in the list, click the condition and then, in the toolbar, click the down arrow.

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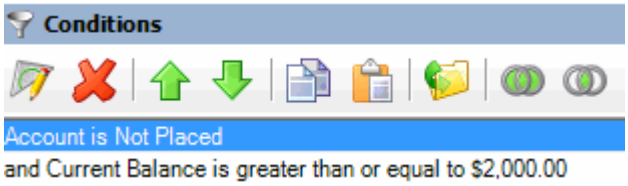
## Set a Query Condition to Optional or Required

Use the **Conditions** pane to set a query condition to optional or required using Boolean operators (OR, AND). The system sets conditions to "required" by default. If a query has a single condition, the query requires that condition and you cannot set it to optional. If a query has more than one condition, you can set each condition that follows the first condition in the list to required or optional. For more information about Boolean operators, see Boolean Operators.

**To set a query condition to optional or required**

1. Go to the **Conditions** pane.




2. To change the query so that only one condition has to be true for an account to appear in the query results, do one of the following:

- Click the second condition and then, in the toolbar, click the OR icon.
- Right-click the second condition and then click **Set Condition Optional**.

The condition changes from "and" to "or."

3. To change the query to require both conditions for an account to appear in the query results, do one of the following:
4. Click the second condition and then, in the toolbar, click the AND icon.

5. Right-click the second condition and then click **Set Condition Required**.

   The condition changes from "or" to "and."

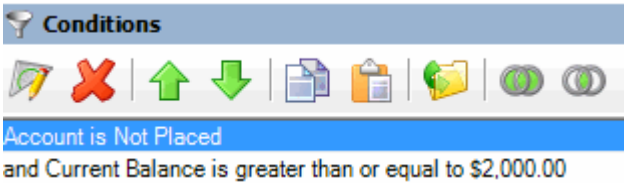
GENESYS Feedback

## Delete a Query Condition

Use the **Conditions** pane to delete a condition from a query.

**To delete a query condition**

1. Go to the **Conditions** pane.




2. Do one of the following:

- Click the condition and then, in the toolbar, click the Delete icon.
- Click the condition and then press the **Delete** key.
- Right-click the condition and then click **Delete**.

   A confirmation dialog box appears.

3. Click **Yes**.

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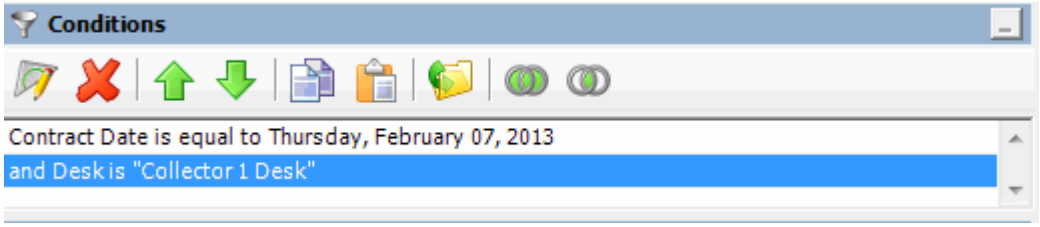
## Boolean Operators

Boolean operators allow you to set a query condition to optional or required.

### AND condition

The AND condition sets a condition to required.

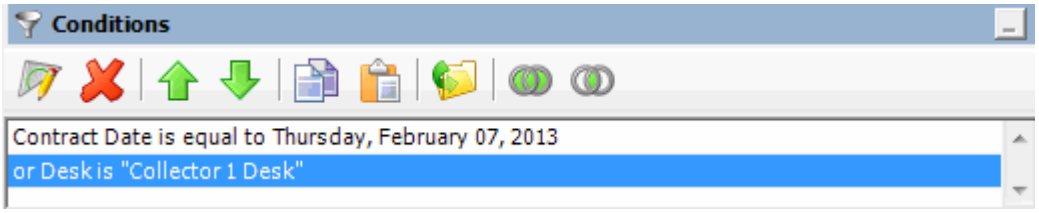
In the following example, both conditions must be true for an account to appear in the query results. So, if an account contract date is "February 7, 2013" and the Desk is "Collect 1 Desk," the query results include the account. If an account contract date is "February 7, 2013" but the Desk is not "Collect 1 Desk," the query results don't include the account. If an account contract date is not "February 7, 2013" but the Desk is "Collect 1 Desk," the query results don't include the account.




### OR condition

The OR condition sets a condition to optional.

In the following example, if an account contract date is "February 7, 2013" but the Desk is not "Collect 1 Desk," the query results include the account. If an account contract date is not "February 7, 2013" but the Desk is "Collect 1 Desk," the query results include the account. If an account contract date is "February 7, 2013" and the Desk is "Collect 1 Desk," the query results include the account. If an account contract date is not "February 7, 2013" or the Desk is not "Collect 1 Desk," the query results don't include the account.






## Query Condition Types

You use query conditions when creating and running queries. For each condition you select for your query, you specify the criteria to use to evaluate accounts. The criteria available is based on the condition type.

Each condition is one of the following types:

- Dates
- Single option
- Multiple option

### Dates

Date conditions allow you to query accounts based on a specific date, date range, any date or blank date, or relative date. When you select a date condition, a dialog box displays to allow you to specify the date criteria. The criteria available depends on the value you select in the **Value is** list box, and whether you select the **Relative** check box.

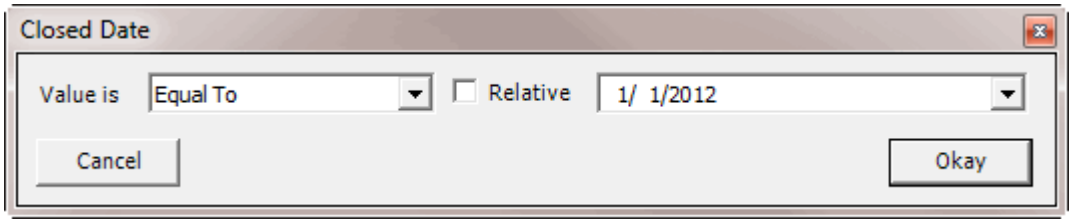
Specific date

Use one of the following comparisons to evaluate accounts based on a specific date:

| **Value is** | **Description** |
|---|---|
| Equal To | Retrieves accounts where the date matches a specific date. |
| Not Equal To | Retrieves accounts where the date does not match a specific date. |
| Later Than or Equal To | Retrieves accounts where the date matches or comes after a specific date. |
| Earlier Than or Equal To | Retrieves accounts where the date matches or comes before a specific date. |
| Later Than | Retrieves accounts where the date comes after a specific date. |

| | |
|---|---|
| Earlier Than | Retrieves accounts where the date comes before a specific date. |

In the following example, the system retrieves accounts where the **Closed Date** is 01/01/2012.

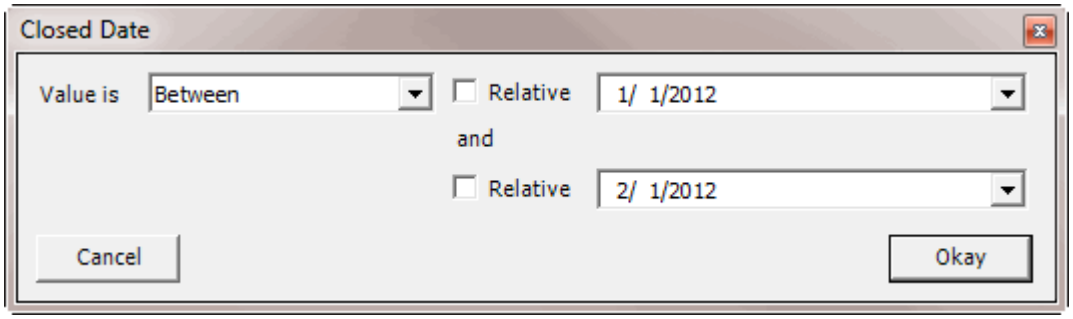



Date range

Use one of the following comparisons to evaluate accounts based on a date range:

| **Value is** | **Description** |
|---|---|
| Between | Retrieves accounts where the date falls between two specific dates. |
| Not Between | Retrieves accounts where the date comes before a specific start date or after a specific end date, but not between the two dates. |

In the following example, the system retrieves accounts where the **Closed Date** falls on or between 01/01/2012 and 02/01/2012.

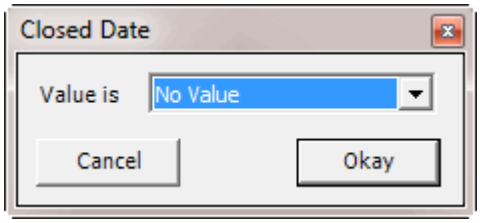



Any date or blank date

Use one of the following comparisons to evaluate accounts based on whether a date is blank or contains any value:

| **Value is** | **Description** |
|---|---|
| No Value | Retrieves accounts where the date is blank. |
| Any Value | Retrieves accounts where the date is any date or blank. |

In the following example, the system retrieves accounts where the **Closed Date** is blank (doesn't contain a value).



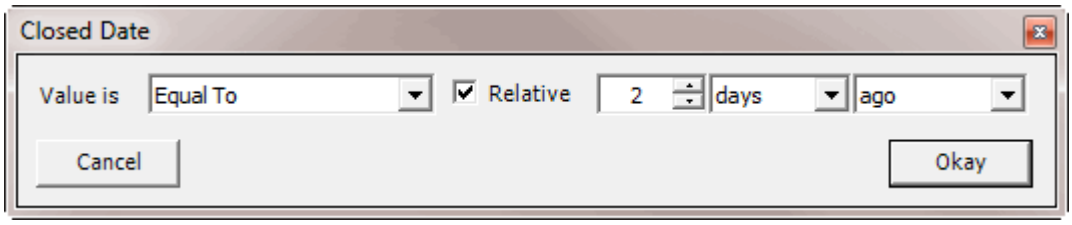

Relative date

Use the relative date option to evaluate accounts based on the relation of a date to the current date. You specify a comparison and the criteria to use to calculate the relative date. The criteria are the number of days, months, or years from the current date, and whether to add or subtract that number from the current date.

Use one of the following comparisons to evaluate accounts based on the calculated relative date:

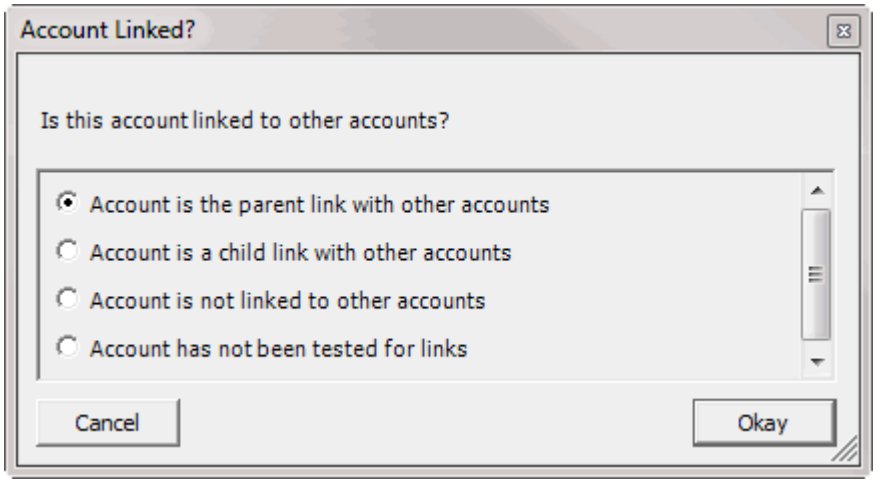
| **Value is** | **Description** |
|---|---|
| Equal To | Retrieves accounts where the date matches the relative date. |
| Not Equal To | Retrieves accounts where the date does not match the relative date. |
| Later Than or Equal To | Retrieves accounts where the date matches or comes after the relative date. |
| Earlier Than or Equal To | Retrieves accounts where the date matches or comes before the relative date. |
| Later Than | Retrieves accounts where the date comes after the relative date. |
| Earlier Than | Retrieves accounts where the date comes before the relative date. |

In the following example, the system retrieves accounts where the **Closed Date** is two days before the current date.



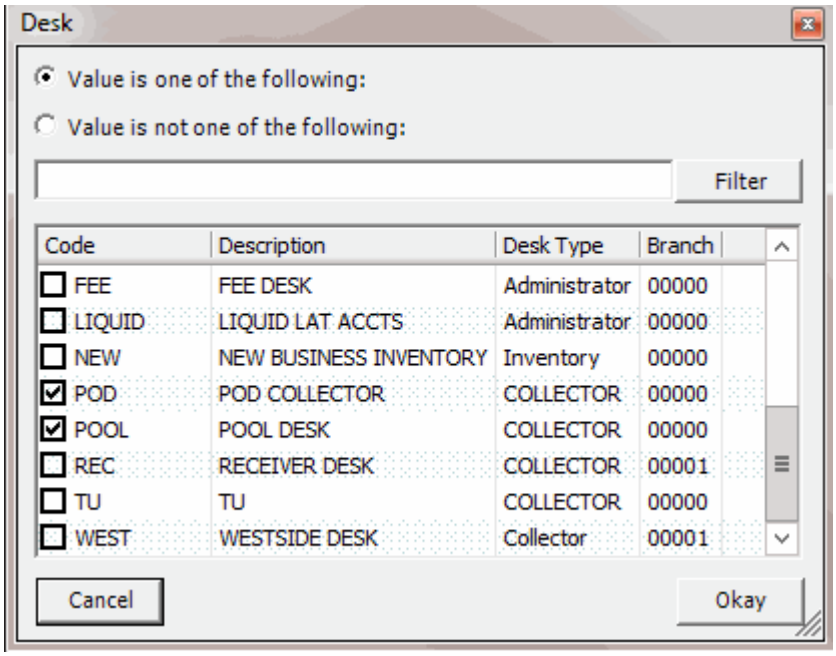

**Single option**

Single option conditions allow you to retrieve accounts that match a single option in a group of options. In the following example, the system retrieves accounts that are the parent link to other accounts.




**Multiple option**

Multiple option conditions allow you to retrieve accounts that match one or more options in a group of options. In the following example, the system retrieves accounts assigned to the POD desk and accounts assigned to the POOL desk.




## Query Order

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Feedback

### Query Order

Use the **Order** pane to specify the sort order for the data returned in the query results. For example, if the **Order** pane includes desk and customer, the system sorts the query results first by desk and then by customer within the desk.

**Related Topics**

Specify the Query Sort Order

Modify the Sort Order

Set the Sort Order to Ascending

Set the Sort Order to Descending

Delete a Data Item From the Sort

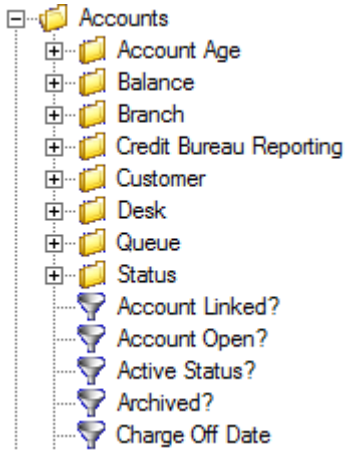
GENESYS Feedback

## Specify the Query Sort Order

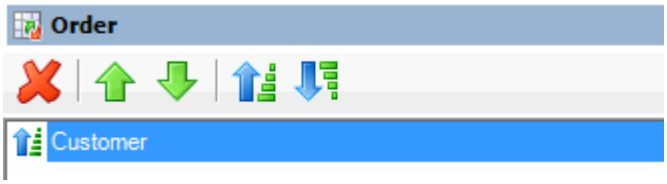
Use the **Order** pane to specify the sort order for the query results.

**To specify the query sort order**

1. In the **Data Selection** pane, click the plus sign (**+**) next to a folder to expand it.




2. Click the data item to use to sort the query results and drag and drop it into the **Order** pane.




3. Drag and drop more data items as necessary.

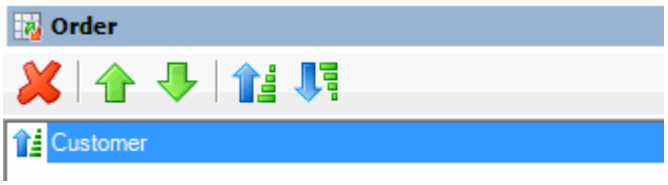
GENESYS Feedback

## Modify the Sort Order

Use the **Order** pane to modify the sort order for the query results.

**To modify the sort order**

1. Go to the **Order** pane.




2. To move up a data item in the list, click the data item and then, in the toolbar, click the up arrow.
3. To move down a data item in the list, click the data item and then, in the toolbar, click the down arrow.

GENESYS Feedback

### Set the Sort Order to Ascending

Use the **Order** pane to set the sort order for a data item to ascending order.

**To set the sort order to ascending**

1. Go to the **Order** pane.

2. Do one of the following:
3. Click the data item and then, in the toolbar, click the Ascending icon.
4. Right-click the data item and then click **Set Ascending Order**.

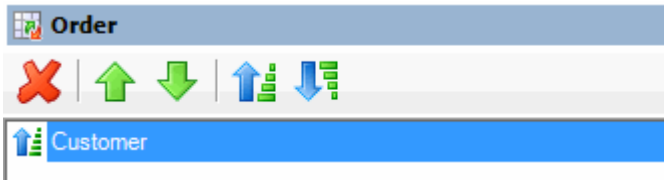
GENESYS Feedback

### Set the Sort Order to Descending

Use the **Order** pane to set the sort order for a data item to descending order.

**To set the sort order to descending**

1. Go to the **Order** pane.




2. Do one of the following:
3. Click the data item and then, in the toolbar, click the Descending icon.
4. Right-click the data item and then click **Set Descending Order**.

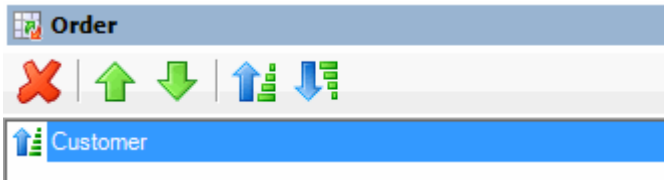
Feedback

### Delete a Data Item From the Sort

Use the **Order** pane to delete a data item from the query results sort order

**To delete a data item from the sort**

1. Go to the **Order** pane.




2. Do one of the following:

- Click the data item and then, in the toolbar, click the Delete icon.
- Click the data item and then press the **Delete** key.
- Right-click the data item and then click **Delete**.

A confirmation dialog box appears.

3. Click **Yes**.

## Query Results

Feedback

### Query Results

Use the **Preview Numbers** tab to view the results of a query, and change the view.

**Related Topics**

Run a Query

Arrange Column Headings

Pin a Column

Sort Query Results

Group Accounts

Summarize Query Data

Filter Query Results

Set Custom Filter Criteria

Custom Filter Operations

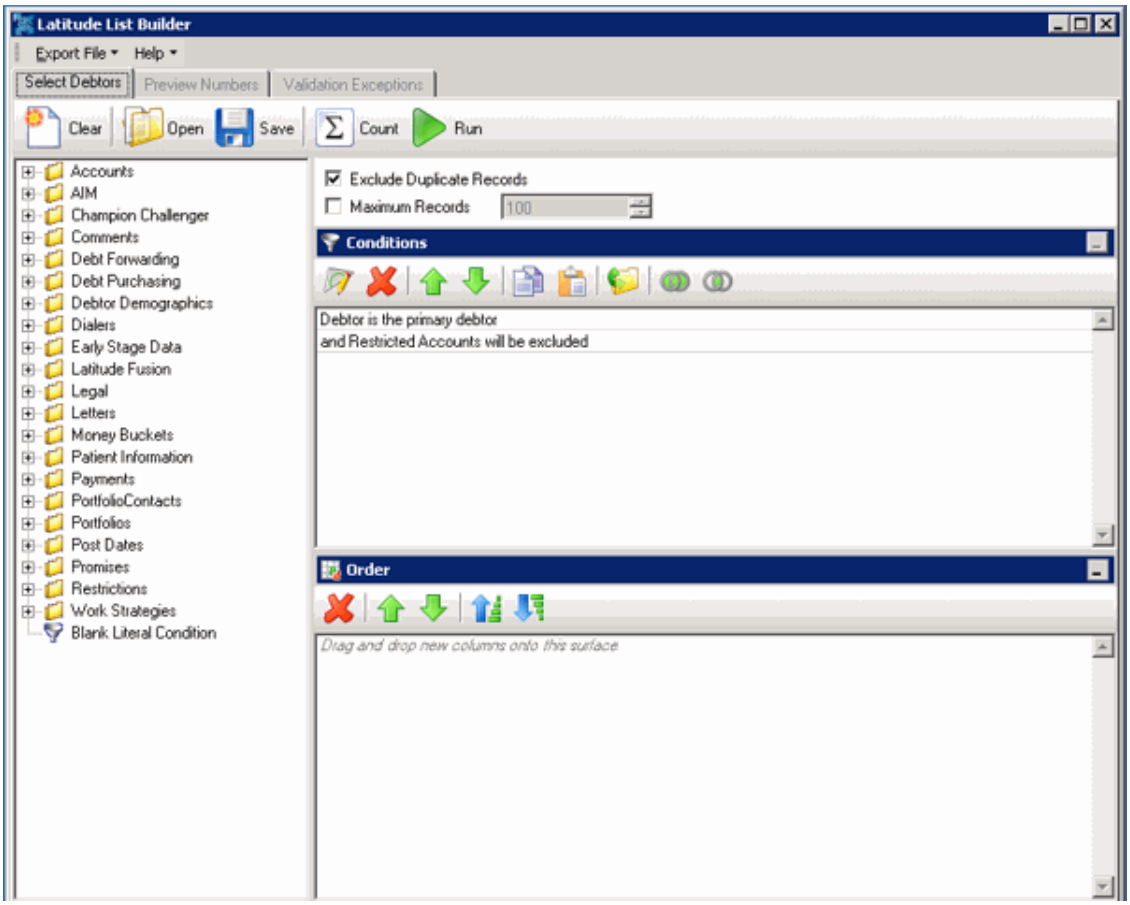
Feedback

## Run a Query

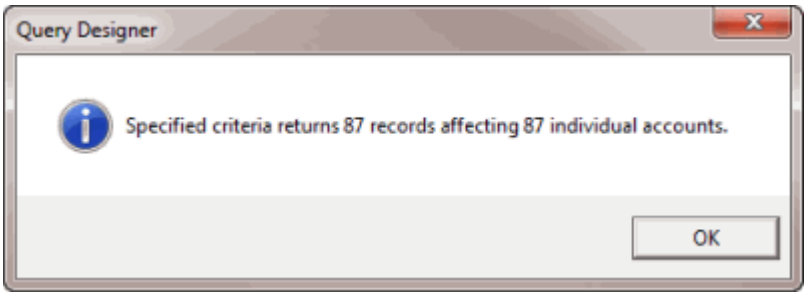
Use the **Preview Numbers** tab to view the results of a query.

**To run a query**

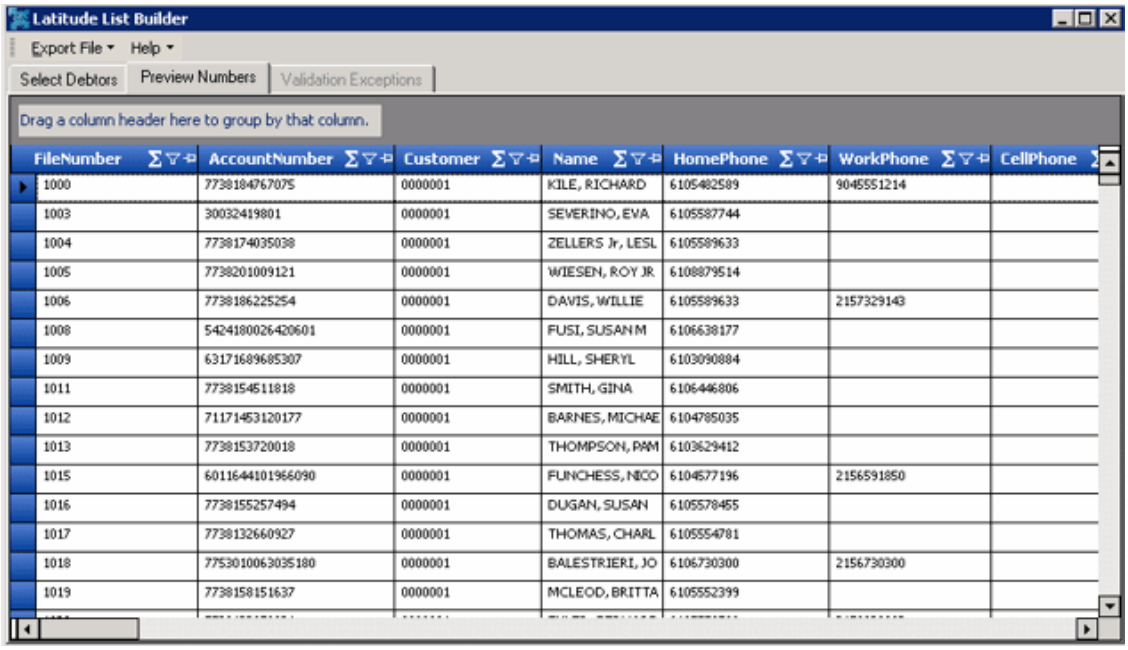
1. Open a query.




2. To count the number of records that match the criteria, do the following:
    1. In the toolbar, click **Count**. The **Query Designer** dialog box appears.




    b. Click **OK**.
3. To view the query results, in the toolbar, click **Run**. The query results appear on the **Preview Numbers** tab.




GENESYS

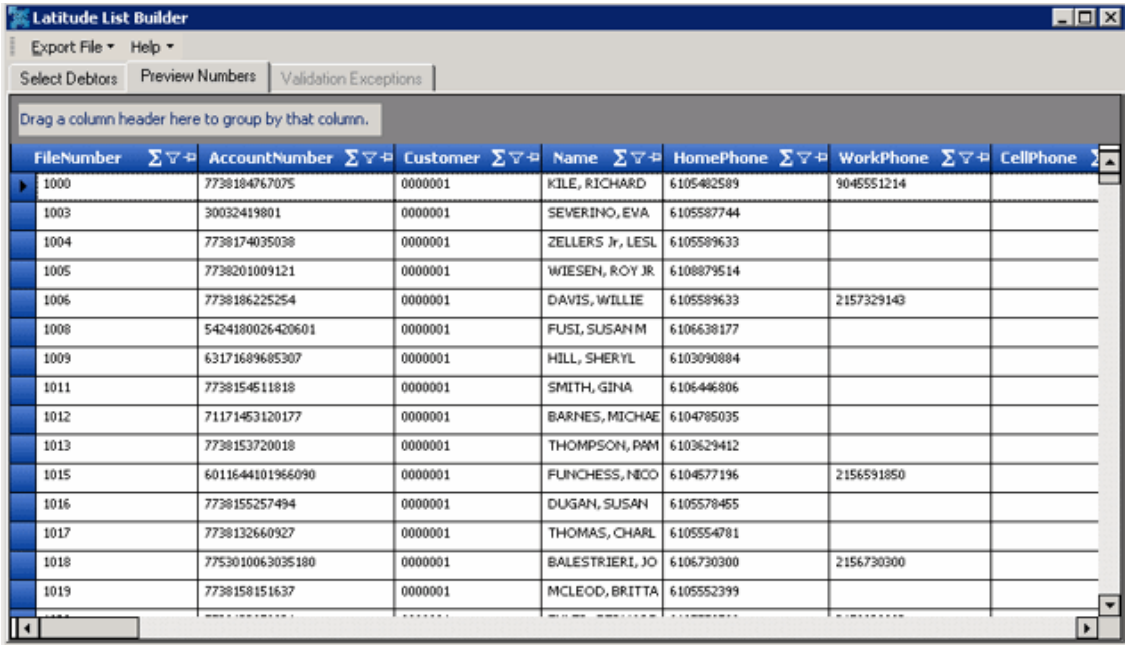
Feedback

## Arrange Column Headings

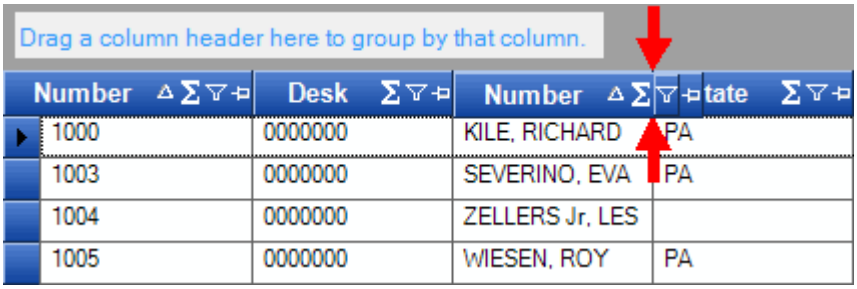
Use the **Preview Numbers** tab to change the order in which columns appear in the query results.

**To arrange column headings**

1. In the toolbar, click **Run**. The results appear on the **Preview Numbers** tab.




2. Click a column heading and drag it to the new location.
3. When two red arrows appear in the location where you want to place the column, release your mouse button.



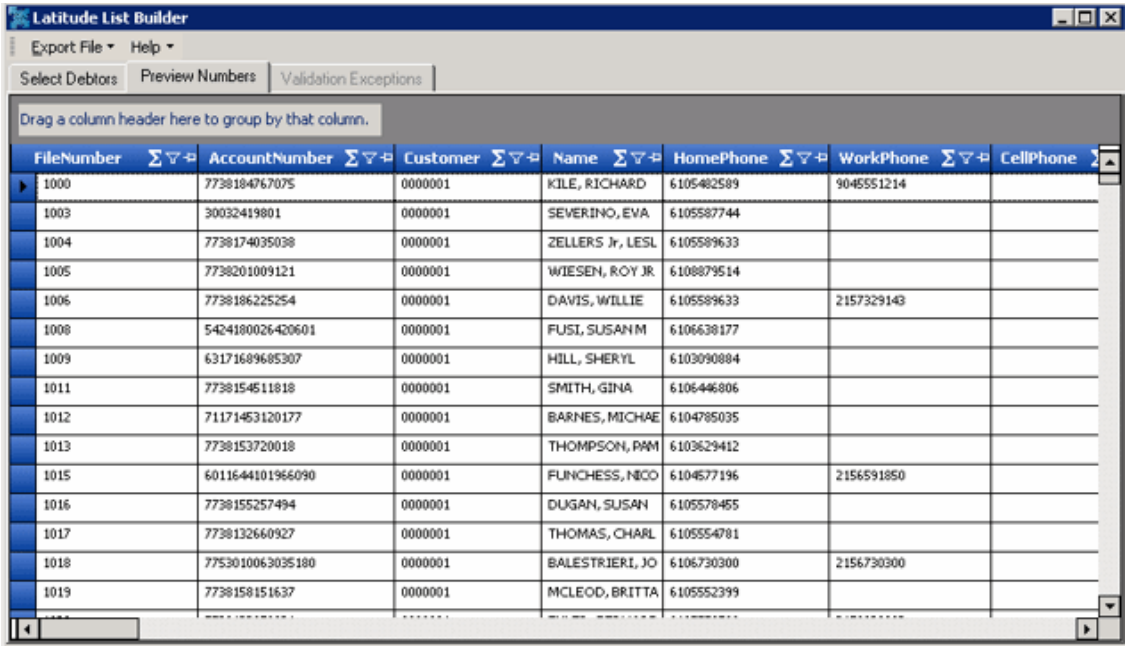



### Pin a Column

Use the **Preview Numbers** tab to pin a column in the query results so that it remains stationary when you scroll horizontally.

**To pin a column**

1. In the toolbar, click **Run**. The results appear on the **Preview Numbers** tab.




2. In the column heading, click the Pushpin icon. The pushpin points down to indicate that the column is pinned.
3. Scroll horizontally in either direction and the pinned column remains stationary.

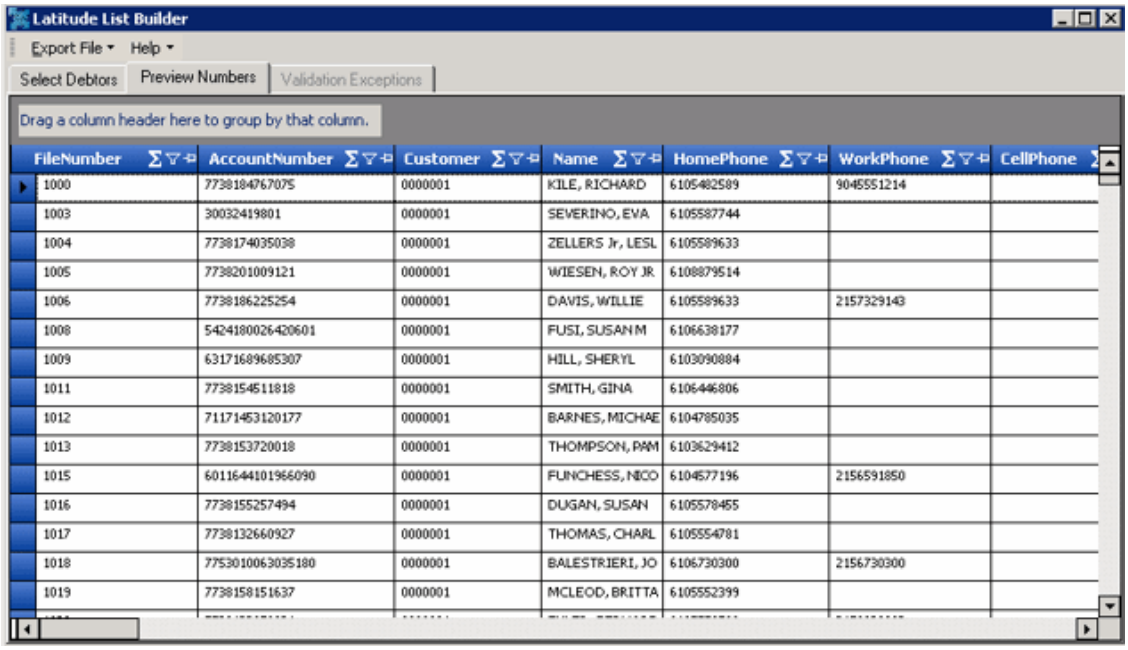


### Sort Query Results

Use the **Preview Numbers** tab to sort the query results.

**To sort query results**

1. In the toolbar, click **Run**. The results appear on the **Preview Numbers** tab.




2. Click a column heading. An arrow that points upward appears next to the column heading to indicate that the system sorted the column in ascending order.
3. To sort the column in descending order, click the column heading again. The arrow points downward to indicate that the system sorted the column in descending order.

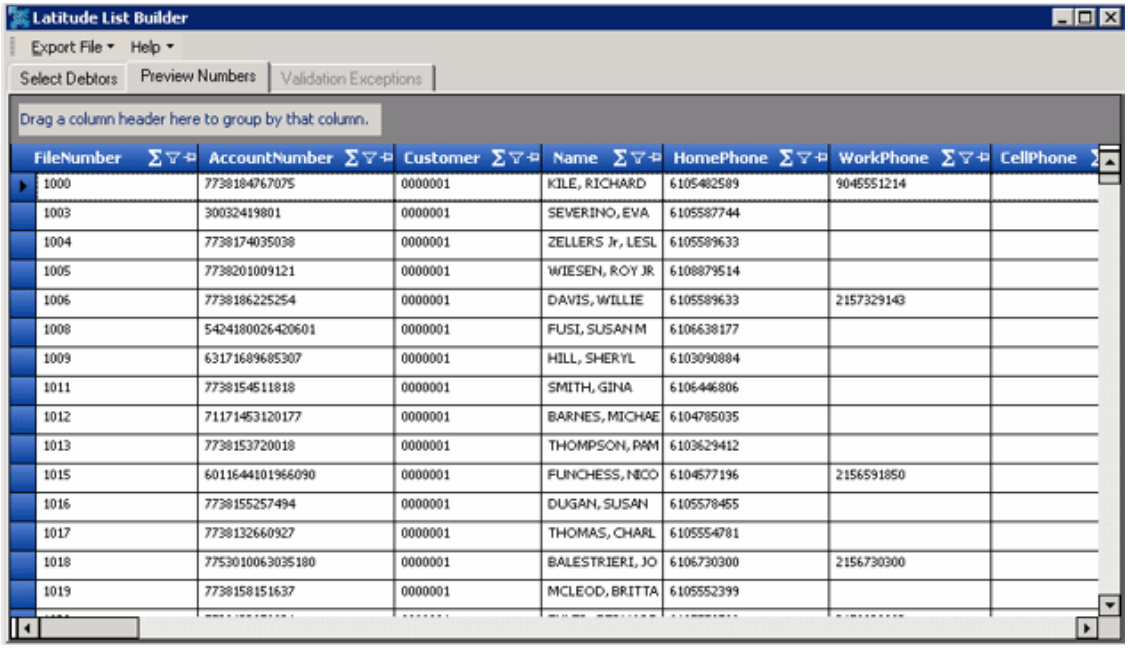
GENESYS Feedback

## Group Accounts

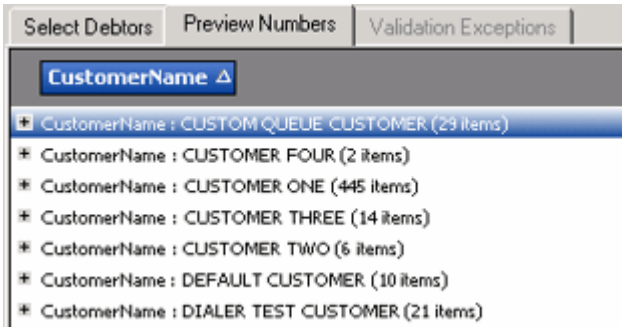
Use the **Preview Numbers** tab to group accounts in the query results.

### To group accounts

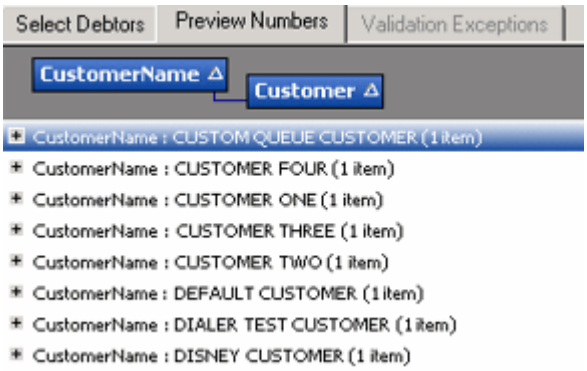
1. In the toolbar, click **Run**. The results appear on the **Preview Numbers** tab.



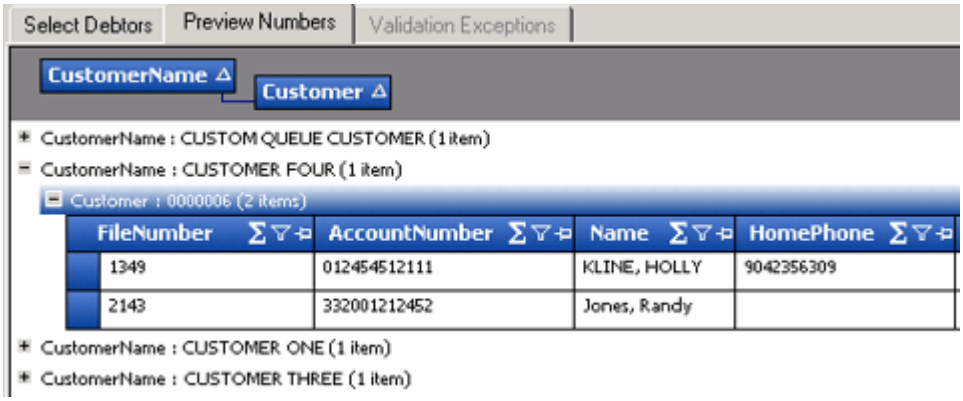
2. Click a column heading, drag it into the space above the column headings, and drop it. The system groups the accounts on the specified column. The following example shows accounts grouped by customer name.




3. To view the accounts in a group, click the plus sign (+) next to the group to expand it.
4. To add a group within a group, do the following:
    1. Click the plus sign (+) next to the group to expand it.
    2. Click a column heading, drag it into the space above the column headings, and drop it.




    c. Click the plus sign (+) next to the group to expand it.



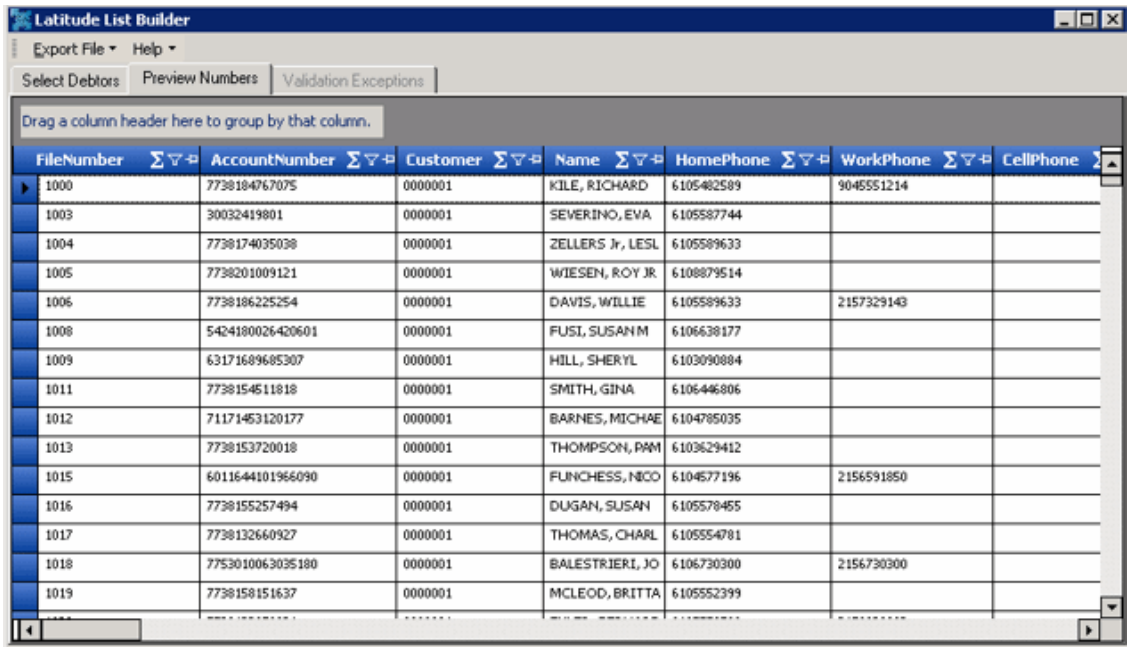

5. To change the sort for a group (ascending or descending), click the group heading.
6. To delete a group, click the group heading and drag and drop it back into the query results space.

## Summarize Query Data

Use the **Preview Numbers** tab to summarize query results.

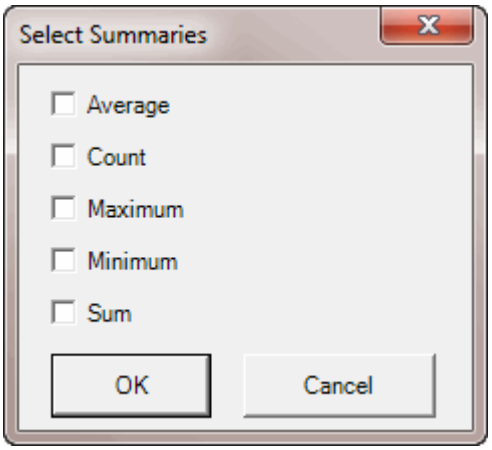
**To summarize query data**

1. In the toolbar, click **Run**. The results appear on the **Preview Numbers** tab.




| FileNumber | AccountNumber | Customer | Name | HomePhone | WorkPhone | CellPhone |
|---|---|---|---|---|---|---|
| 1000 | 7738184767075 | 0000001 | KILE, RICHARD | 6105482589 | 9045551214 | |
| 1003 | 30032419801 | 0000001 | SEVERINO, EVA | 6105587744 | | |
| 1004 | 7738174035038 | 0000001 | ZELLERS Jr, LESL | 6105589633 | | |
| 1005 | 7738201009121 | 0000001 | WIESEN, ROY JR | 6108879514 | | |
| 1006 | 7738186225254 | 0000001 | DAVIS, WILLIE | 6105589633 | 2157329143 | |
| 1008 | 5424180026420601 | 0000001 | FUSI, SUSAN M | 6106638177 | | |
| 1009 | 63171689685307 | 0000001 | HILL, SHERYL | 6103090884 | | |
| 1011 | 7738154511818 | 0000001 | SMITH, GINA | 6106446806 | | |
| 1012 | 71171453120177 | 0000001 | BARNES, MICHAE | 6104785035 | | |
| 1013 | 7738153720018 | 0000001 | THOMPSON, PAM | 6103629412 | | |
| 1015 | 6011644101966090 | 0000001 | FUNCHESS, NICO | 6104577196 | 2156591850 | |
| 1016 | 7738155257494 | 0000001 | DUGAN, SUSAN | 6105578455 | | |
| 1017 | 7738132660927 | 0000001 | THOMAS, CHARL | 6105554781 | | |
| 1018 | 7753010063035180 | 0000001 | BALESTRIERI, JO | 6106730300 | 2156730300 | |
| 1019 | 7738158151637 | 0000001 | MCLEOD, BRITTA | 6105552399 | | |

2. In the column heading, click the Sigma icon. The **Select Summaries** dialog box appears. The options available are based on the item's data type.




3. Select the calculations to perform on the data and then click **OK**. The result appears in the last row of the data grid. If you grouped data, the system calculates the data for each group and displays the results in the last row for each group.

| Customer | SSN | Balance (P+I) | Balance (P) | Queue |
|---|---|---|---|---|
| 0000010 | | 1500.0000 | 1500.0000 | 015 |
| 0000010 | | 1025.0000 | 1000.0000 | 015 |
| 0000010 | 999887777 | 26000.0000 | 25000.0000 | 015 |
| 0000010 | 999988777 | 52000.0000 | 50000.0000 | 015 |
| 0000010 | 124588812 | 15000.0000 | 15000.0000 | 875 |
| 0000010 | 789787897 | 15000.0000 | 15000.0000 | 015 |
| 0000010 | 555555555 | 5010.0000 | 5000.0000 | 015 |
| 0000011 | | 2020.0000 | 1000.0000 | 015 |
| Grand Summaries | | | | |
| | | Average = 1527.71694... | | |

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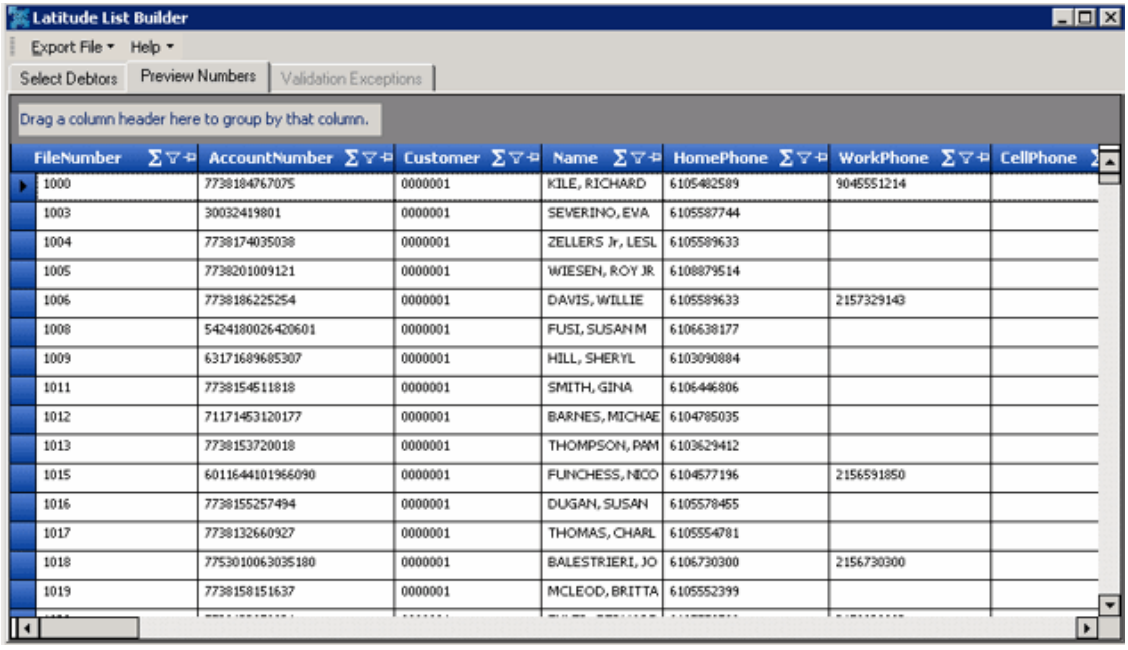
## Filter Query Results

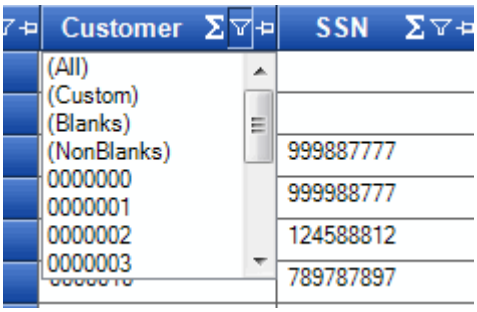
Use the **Preview Numbers** tab to filter query results.

### To filter query results

1. In the toolbar, click **Run**. The results appear on the **Preview Numbers** tab.




2. In the column to filter, click the Funnel icon. A list of options for the specified column appears.



**(All):** If selected, the system didn't filter the results.

**(Custom):** If selected, allows you to set custom filtering conditions.

**(Blanks):** If selected, the system limits the results to accounts with a blank or null value in the specified column.

**(NonBlanks):** If selected, the system limits the results to accounts that don't have a blank or null value in the specified column.

3. Click any value other than **(Custom)**. The list closes and the query results only include the records that match the specified filter.
4. To set custom filter criteria, do the steps to Set Custom Filter Criteria.

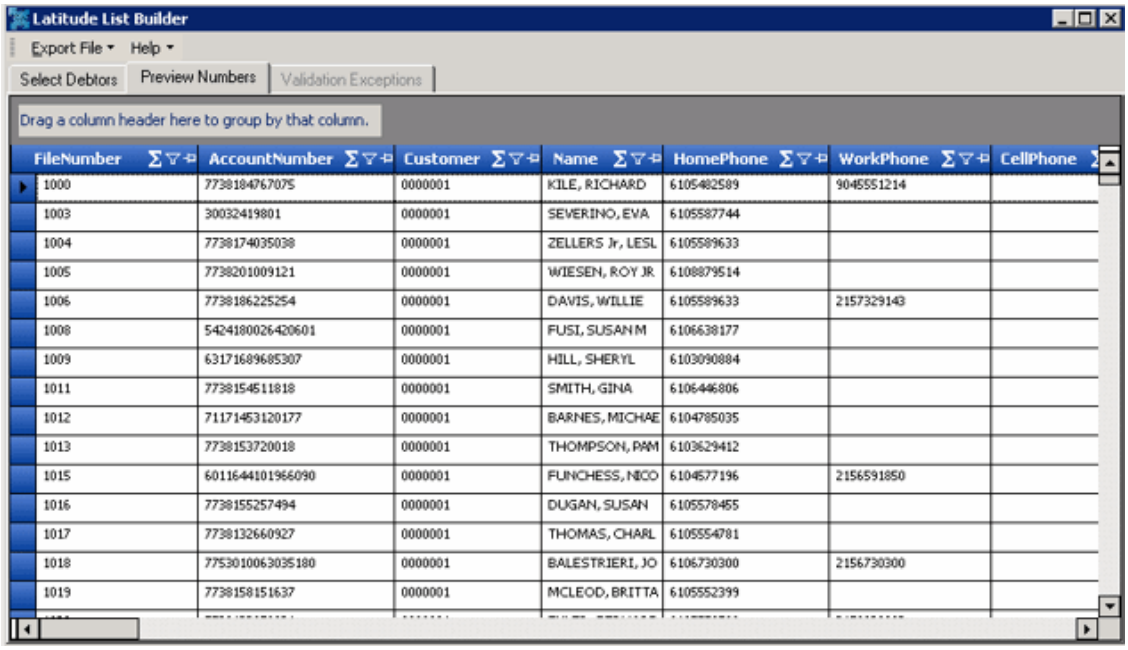


## Set Custom Filter Criteria

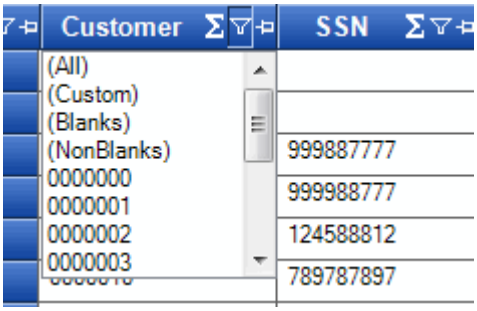
Use the **Enter Filter Criteria for...** dialog box to specify selection criteria for any column in the query results. You can combine selection criteria (or conditions) to create more complex filters. The full name of the dialog box is based on the column you are filtering.

**To set custom filter criteria**

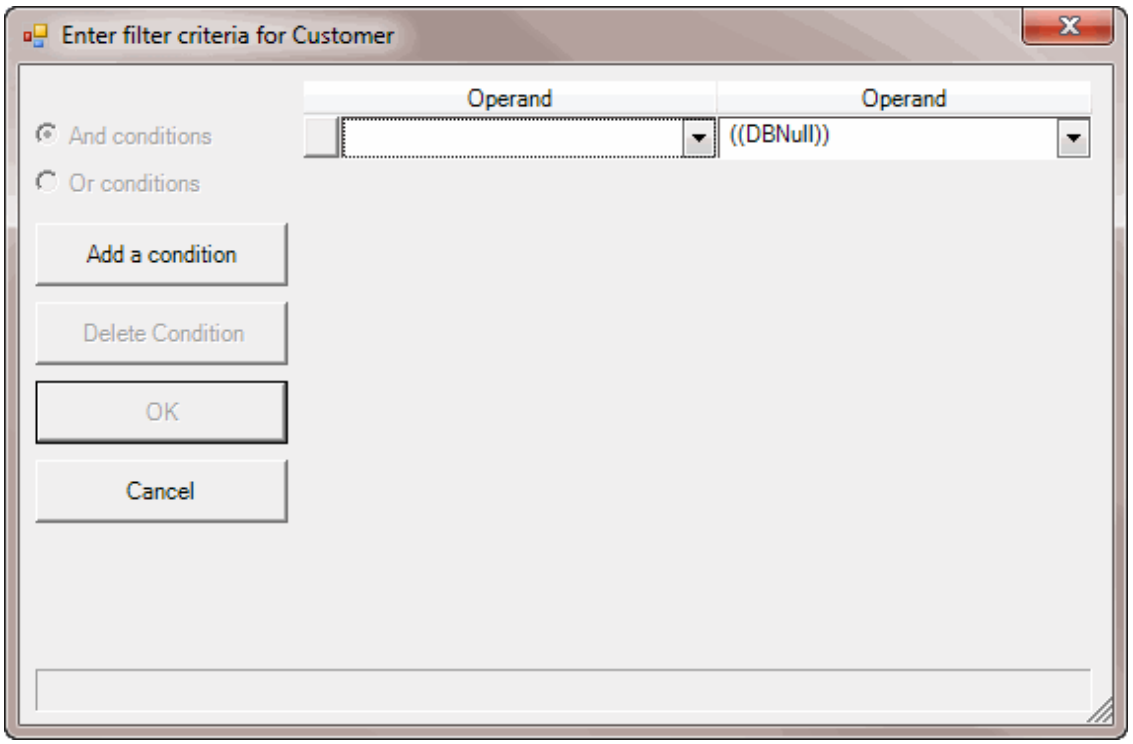
1. In the toolbar, click **Run**. The results appear on the **Preview Numbers** tab.




2. In the column heading of the column to filter, click the Funnel icon. A list of options for the specified column appears.




3. Click **(Custom)**. The **Enter Filter Criteria for...** dialog box appears. The following example shows the dialog box for the **Customer** column.




4. In the first **Operand** list box, click an operator. For more information, see Custom Filter Operators.
5. In the **Operand** list box, click or type an operand. In the previous example, the operator is "= Equals" and the operand is "0000001 - CUSTOMER ONE." The condition appears in the lower portion of the dialog box.
6. To add conditions, click **Add a condition**. A blank row appears.
7. To delete a condition, click the condition and then click **Delete Condition**.
8. If you set multiple conditions, do one of the following:

- To set the filter so that all the conditions have to be true for an account to appear in the query results, click **And conditions**. For example, customer does not equal "0000001 - CUSTOMER ONE" and customer does not equal "0000002 - CUSTOMER TWO" means that you want to see accounts for all customers except Customer One and Customer Two.
- To set the filter so that only one condition has to be true for an account to appear in the query results, click **Or conditions**. For example, customer equals "0000001 - CUSTOMER ONE" or customer equals "0000002 - CUSTOMER TWO" means that you only want to see accounts for Customer One or Customer Two.

9. When finished creating the custom filter, click **OK**.



### Custom Filter Operations

The following table describes the operators that are available when setting custom filter criteria. The operators available for a data item are based on the item's data type.

| Operator | Description |
|---|---|
| Equals | Include accounts where the data matches the specified value. |
| Does not equal | Include accounts where the data does not match the specified value. |
| Less than | Include accounts where the data is less than the specified value.<br>This operator is for date and numeric data types only. |
| Less than or equal To | Include accounts where the data is less than or equal to the specified value.<br>This operator is for date and numeric data types only. |
| Greater than | Include accounts where the data is greater than the specified value.<br>This operator is for date and numeric data types only. |
| Greater than or equal To | Include accounts where the data is greater than the specified value.<br>This operator is for date and numeric data types only. |
| Like | Includes accounts where data matches the specified pattern.<br>This operator is for alphanumeric data types only. |
| Matches Regular Expression | Includes accounts where the system stores data in the specified format.<br>This operator is for alphanumeric data types only.<br>^[A-Z] finds all values in uppercase character format only.<br>^[a-z] finds all values in lowercase character format only.<br>^[0-9] finds all values in numeric format only.<br>^[A-Za-z] finds all values in mixed case character format.<br>^[A-Za-z] finds all values in mixed case character format.<br>^[^0-9]+$ finds all values with a numeric format and dollar sign.<br>^[A-Za-z0-9] [A-Za-z0-9_]*$ finds all values of mixed case and currency. |
| Starts with | Includes accounts where data starts with the specified character or characters.<br>This operator is for alphanumeric data types only. |

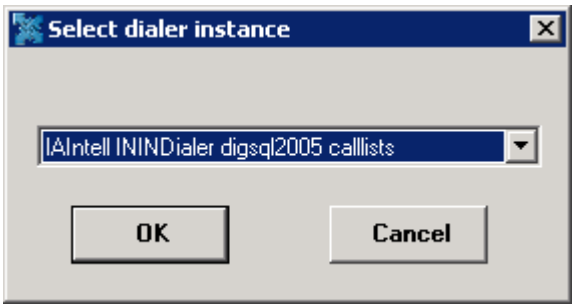
| | |
|---|---|
| Contains | Includes accounts where data contains the specified character or characters.<br>This operator is for alphanumeric data types only. |
| Ends with | Includes accounts where data ends with the specified character or characters.<br>This operator is for alphanumeric data types only. |
| Does not start with | Includes accounts where data does not start with the specified character or characters.<br>This operator is for alphanumeric data types only. |
| Does not contain | Includes accounts where data does not contain the specified character or characters.<br>This operator is for alphanumeric data types only. |
| Does not end with | Includes accounts where data does not end with the specified character or characters.<br>This operator is for alphanumeric data types only. |
| Does not match | Includes accounts where data does not match the specified character or characters.<br>This operator is for alphanumeric data types only. |
| Not like | Includes accounts where data is not like the specified pattern.<br>This operator is for alphanumeric data types only. |

## Set up Dialer Server in List Builder

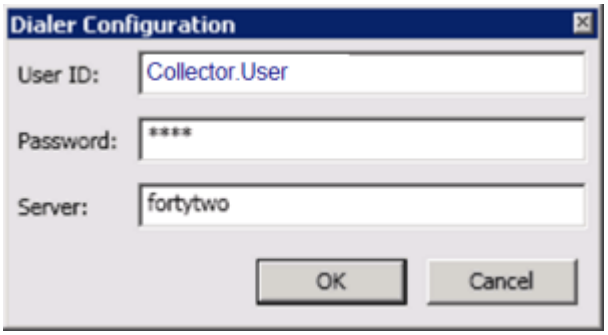
Use the **Dialer Configuration** dialog box to specify the credentials for logging on to a dialer server.

**To set up dialer server in List Builder**

1. In the menu bar, click **Help** and then click **Setup Dialer**. The **Select Dialer Instance** dialog box appears.




2. In the list box, click the dialer instance and then click **OK**. The **Dialer Configuration** dialog box appears.

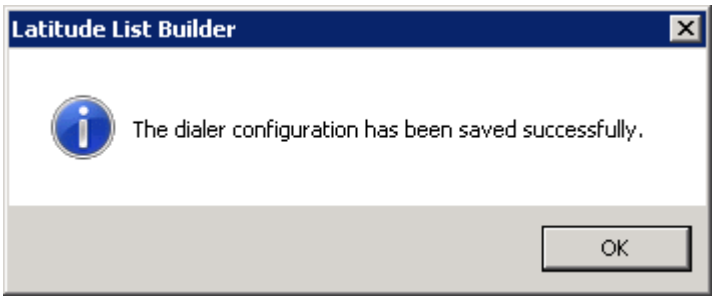



**User ID:** User ID for accessing the dialer server.

**Password:** Password for accessing the dialer server.

**Server:** Name of the dialer server.

3. Complete the information and then click **OK**. A notification dialog box appears.



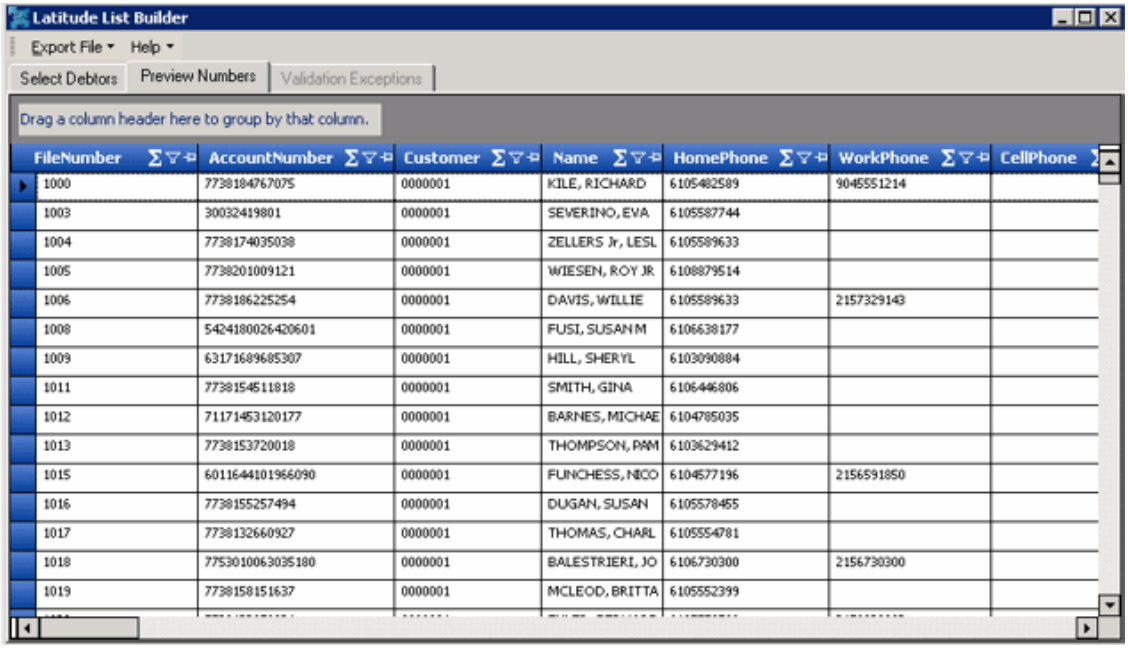

4. Click **OK**.

## Create Dialer File

Use the **Preview Numbers** tab to export the results of a query to a dialer file for a dialer vendor. The file options available for each dialer depend on the file types that the vendor supports.

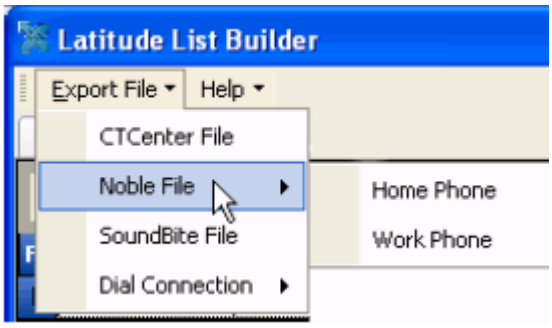
**To create a dialer file**

1. In the toolbar, click **Run**. The results appear on the **Preview Numbers** tab.




| FileNumber | AccountNumber | Customer | Name | HomePhone | WorkPhone | CellPhone |
|---|---|---|---|---|---|---|
| 1000 | 7738184767075 | 0000001 | KILE, RICHARD | 6105482589 | 9045551214 | |
| 1003 | 30032419801 | 0000001 | SEVERINO, EVA | 6105587744 | | |
| 1004 | 7738174035038 | 0000001 | ZELLERS Jr, LESL | 6105589633 | | |
| 1005 | 7738201009121 | 0000001 | WIESEN, ROY JR | 6108879514 | | |
| 1006 | 7738186225254 | 0000001 | DAVIS, WILLIE | 6105589633 | 2157329143 | |
| 1008 | 5424180026420601 | 0000001 | FUSI, SUSAN M | 6106638177 | | |
| 1009 | 63171689685307 | 0000001 | HILL, SHERYL | 6103090884 | | |
| 1011 | 7738154511818 | 0000001 | SMITH, GINA | 6106446806 | | |
| 1012 | 71171453120177 | 0000001 | BARNES, MICHAE | 6104785035 | | |
| 1013 | 7738153720018 | 0000001 | THOMPSON, PAM | 6103629412 | | |
| 1015 | 6011644101966090 | 0000001 | FUNCHESS, NICO | 6104577196 | 2156591850 | |
| 1016 | 7738155257494 | 0000001 | DUGAN, SUSAN | 6105578455 | | |
| 1017 | 7738132660927 | 0000001 | THOMAS, CHARL | 6105554781 | | |
| 1018 | 7753010063035180 | 0000001 | BALESTRIERI, JO | 6106730300 | 2156730300 | |
| 1019 | 7738158151637 | 0000001 | MCLEOD, BRITTA | 6105552399 | | |

2. If you're satisfied with the results, do the following:
    1. In the menu bar, click **Export File** and then click the name of the dialer vendor. The system displays more options for some dialer vendors. In the following example for the Noble dialer vendor, you can choose to include Home Phone or Work Phone in the dialer file.




    After specifying an option (if available), the **Save As** dialog box appears.

    b. In the **File name** box, type a name for the file.

    c. In the **Save as type** box, click the type of file the dialer vendor requires and then click **Save**. The **Process Complete** dialog box appears. It displays the number of records included in the file and the number of records that failed validation.

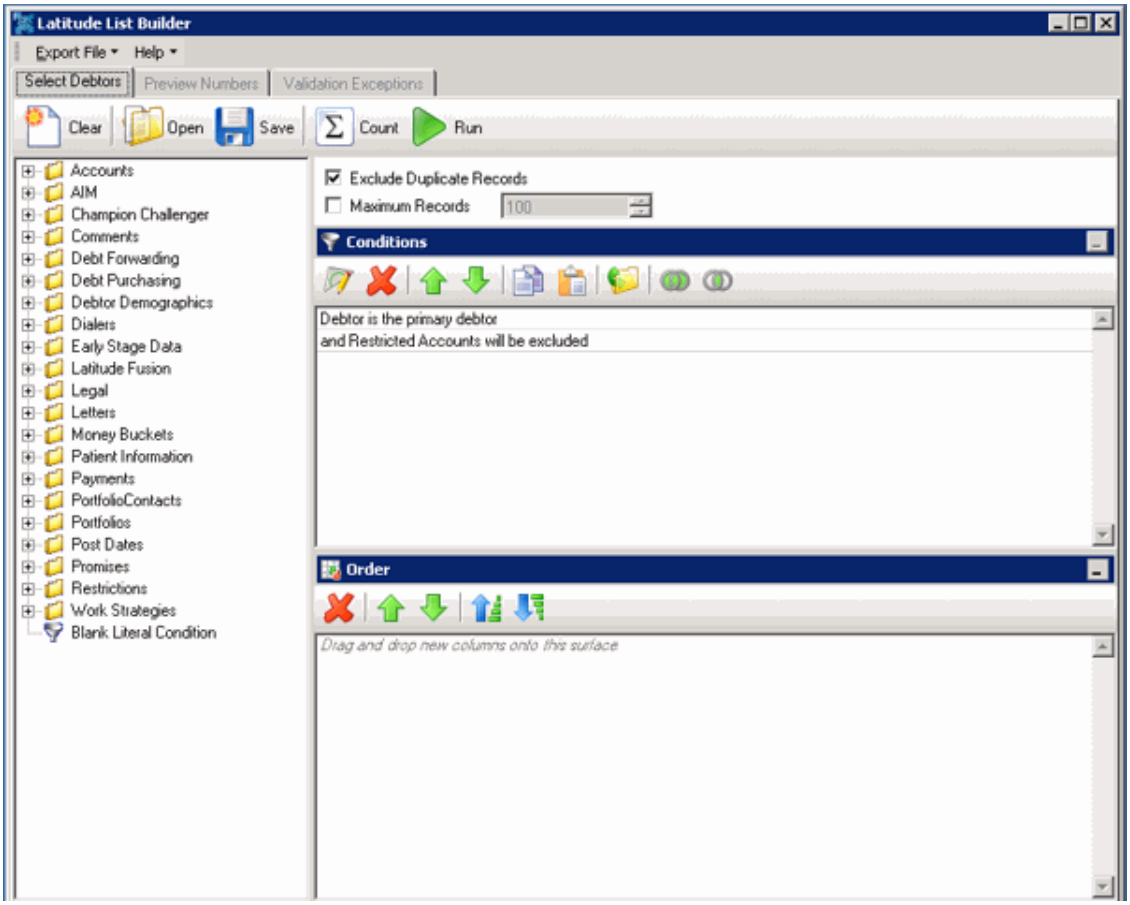
d. Click **OK**.

## Export Call List to Genesys Cloud Campaign

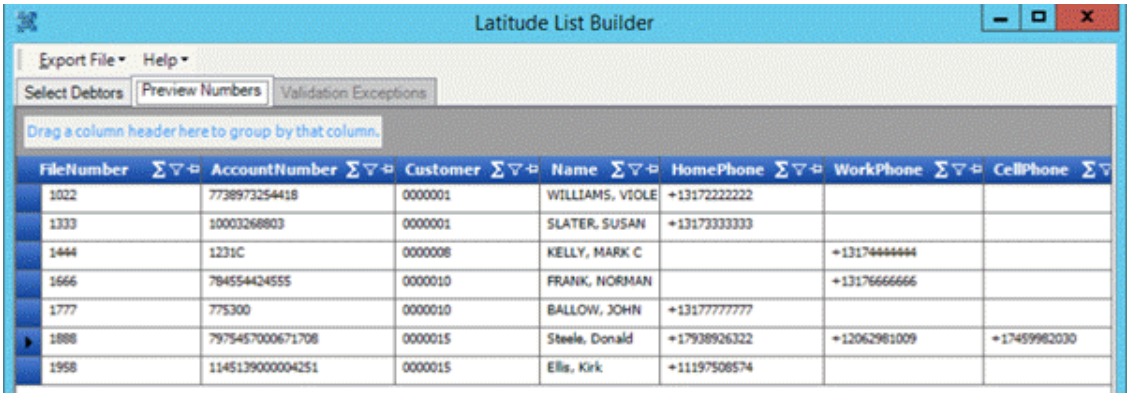
Create and export a call list to Genesys Cloud campaign. This feature is for Latitude integrations with Genesys Cloud. For more information about the integration, see Latitude Integration with Genesys Cloud in the *Latitude Help*.

### To export a call list to a Genesys Cloud campaign

1. In List Builder, drag and drop conditions into the **Conditions** pane to select the accounts to include in the call list.

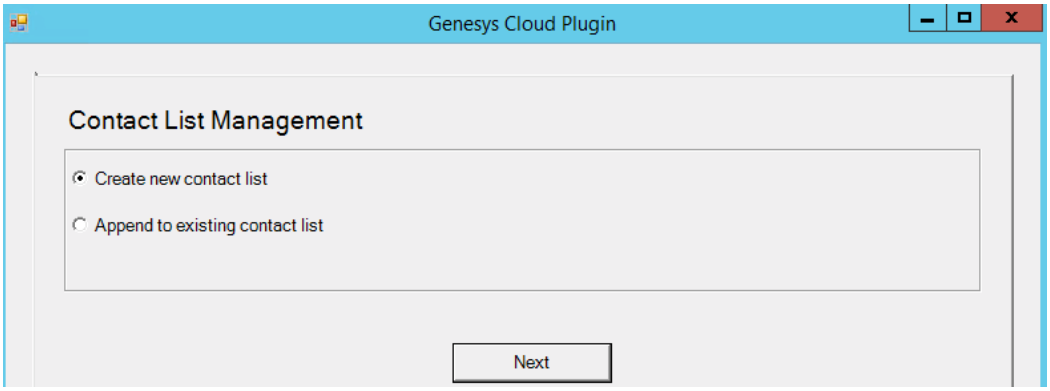



2. In the toolbar, click **Run**. The results appear on the **Preview Numbers** tab.

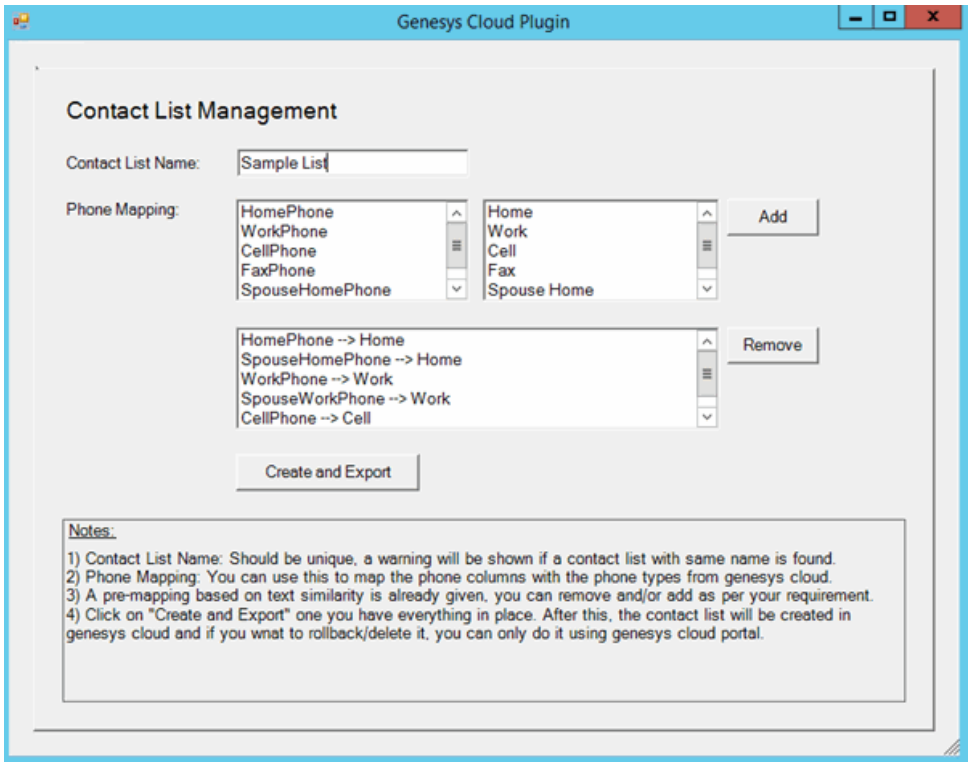



3. In the menu bar, click **Export File** and then click **Genesys Cloud**. The **GCConfig** dialog box appears.

4. In the **Contact List Management**, select one option as following:



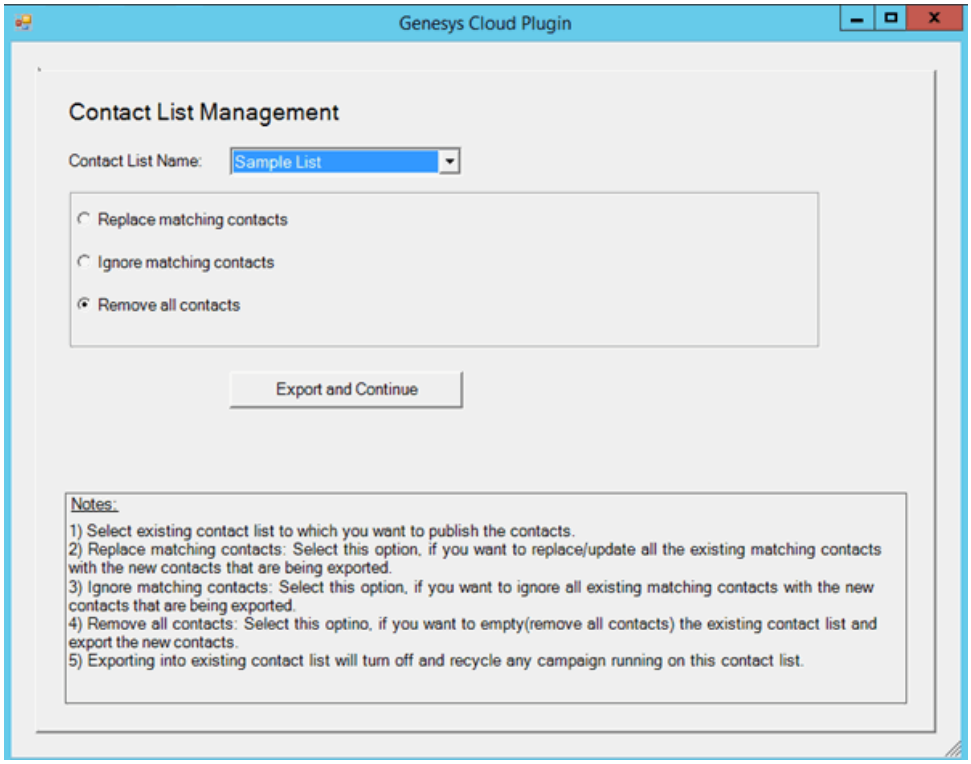

- To create new contacts, select **Create new contact list** option and click **Next**. The **Contact List Management** dialog box appears.




  - **Contact List Name:** Unique name to assign to the contact list.
  - **Phone Mapping:** Phone number mapping from Latitude to Genesys Cloud.

Complete the information and then click **Create and Export**. The contact list will be created in the Genesys Cloud. The **Campaign Management** dialog box appears.

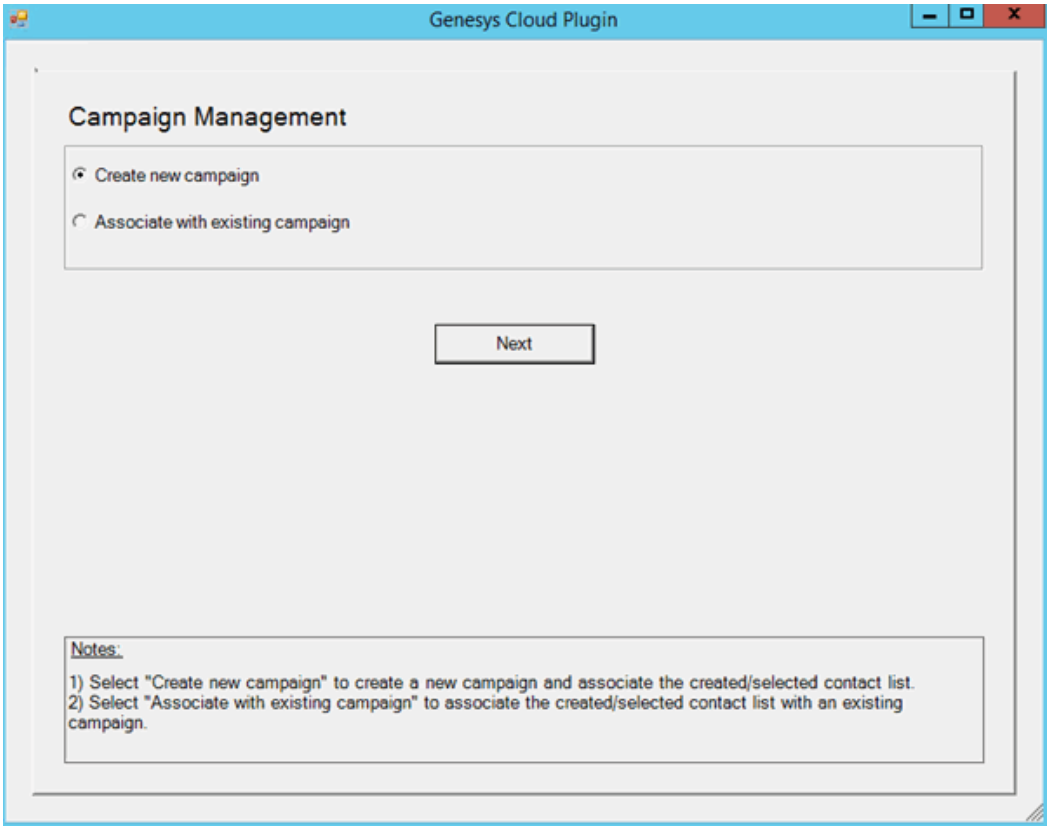
- To modify the existing contacts, select **Append to existing contact** list and click **Next**.



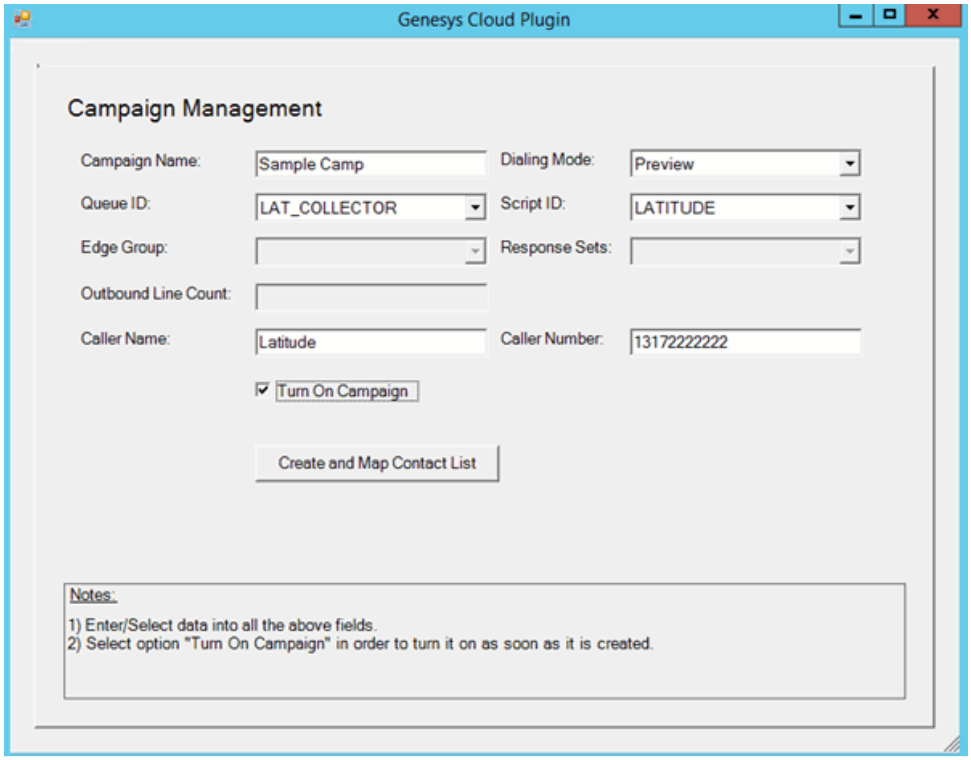

- **Contact List Name:** Existing contact list name to which you want to publish the contacts.
- **Replace existing contacts:** Update/replace all the existing contacts with the new contacts.
- **Leave existing contacts:** Ignoring the existing contacts and updating the list with new contacts.
- **Remove all existing contacts:** Removing all the existing contacts and adding the new contacts.

Select any one above option and then click **Export and Continue**. The **Campaign Management** dialog box appears.

5. In the **Campaign Management**, select one option as following:




- To create new campaign, select **Create new campaign** option and click **Next**.



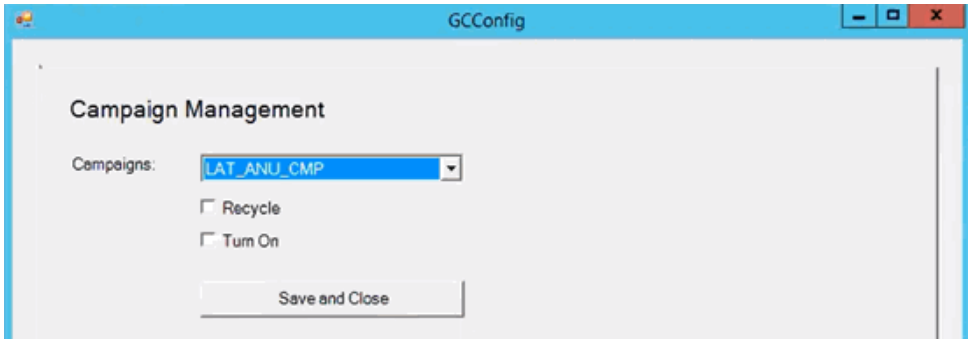

  - **Campaign Name:** Unique name to assign to the campaign.
  - **Dialing Mode:** Calling mode for when and how the campaign places calls.

| Mode | Description |
|---|---|
| AgentLess | Places calls and uses call analysis to detect whether a call was answered, whether by live person or voicemail. If answered, the campaign can play a message or transfer the call to an outbound IVR call flow. |
| Power | Places calls from the campaign list only when an agent is available to take the call. |
| Predictive | Predicts agent availability and places calls accordingly. |
| Preview | Presents the agent with information about the targeted party and allows the agent to place the call when ready. |
| Progressive | Places a call to one party for each available agent to reduce the risk of abandonment. |

  - **Queue ID:** Code that identifies the Genesys Cloud queue to route the campaign calls through.
  - **Script ID:** Code that identifies the Genesys Cloud script for agents to use when processing interactions.
  - **Caller Name:** Caller ID name that you want to display to people when the campaign contacts them.
  - **Caller Number:** Caller ID phone number that you want to display to people when the campaign contacts them.
  - **Phone Mapping:** Phone number mapping from Latitude to Genesys Cloud.
  - **Turn on Campaign:** If selected, the campaign is turned on and active. If cleared, the campaign is turned off and inactive.

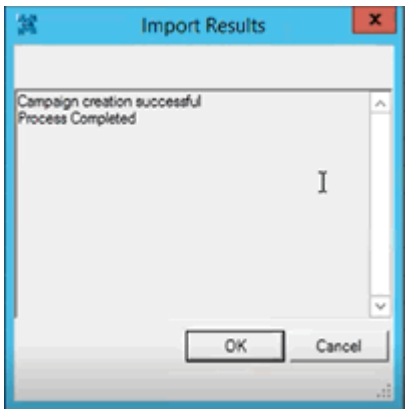
Complete the information and then click **Create and Map Contact List**. List Builder exports the call list and creates the campaign in Genesys Cloud. For more information, see View Latitude Contact List and Campaign in Genesys Cloud in the *Latitude Help*.

- To associate the created/selected contact list with the existing campaign, select **Associate with existing campaign** option and click **Next**.




- **Campaigns:** Existing campaign list is displayed. By default, it will display the associated contact list. Selected campaign will be stopped while it is in progress.
- **Recycle:** Recycle the selected campaign after association.
- **Turn On:** Turn on the campaign after association.

Select any one above option and then click **Save and Close**. The **Import Results** dialog box appears.

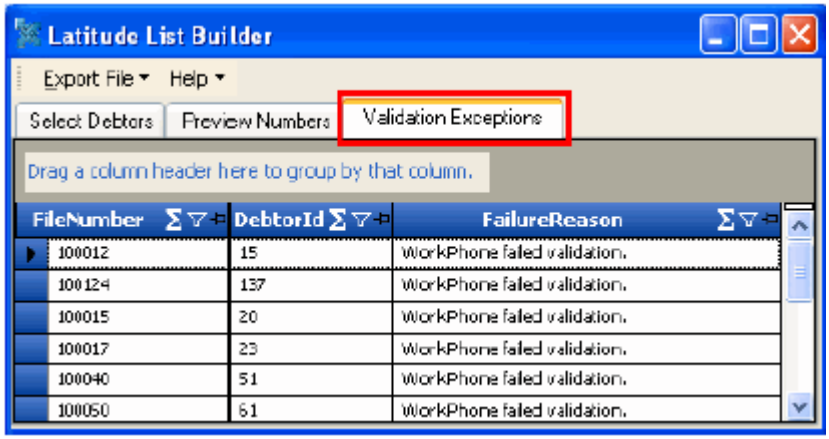


## View Validation Exceptions

Use the **Validation Exceptions** tab to view accounts that failed validation and the reason the accounts failed. The system doesn't include accounts that failed validation in the dialer file.

**To view validation exceptions**

- After exporting query results to a dialer file, click the **Validation Exceptions** tab. If the tab is unavailable for selection, no accounts failed validation.



## View Trace Output

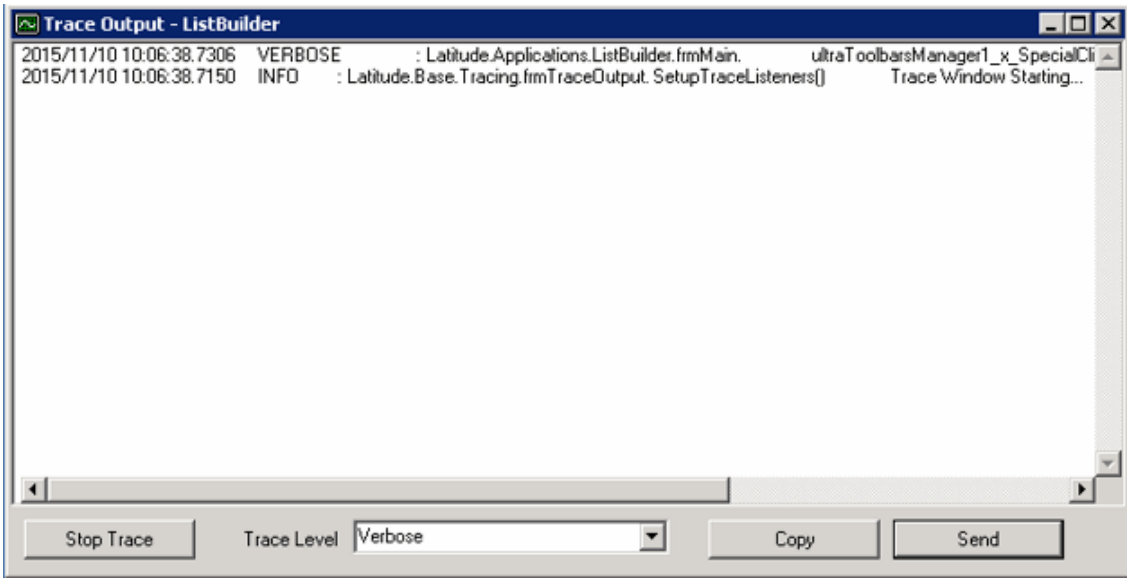
Use the **Trace Output** window to view the raw output of List Builder actions and determine whether an operation succeeded or failed. In the **Trace Output** window, you can do the following:

- Stop and start tracing
- Specify the trace level
- Copy the trace output and paste it in a text editor

**Note:** The option to send the trace output to a printer or an email recipient is not available.

**To view trace output**

1. In the menu bar, click **Help** and then click **Show Trace**. The **Trace Output** window appears.




2. To stop tracing, click **Stop Trace**. The system stops collecting data regarding List Builder actions.
3. To resume tracing, click **Start Trace**. The system resumes tracing.
4. To specify the trace level, in the **Trace Level** list box, click the level of tracing to display. Valid values are:

   **Off:** Hides tracing output.

   **Error:** Shows error tracing only.

   **Warning:** Shows warning tracing only.

   **Info:** Shows informational tracing only.

   **Verbose:** Shows the maximum amount of tracing detail.

5. To copy the trace output to the Clipboard and paste it in a text editor, do the following:
   1. Click **Copy**.

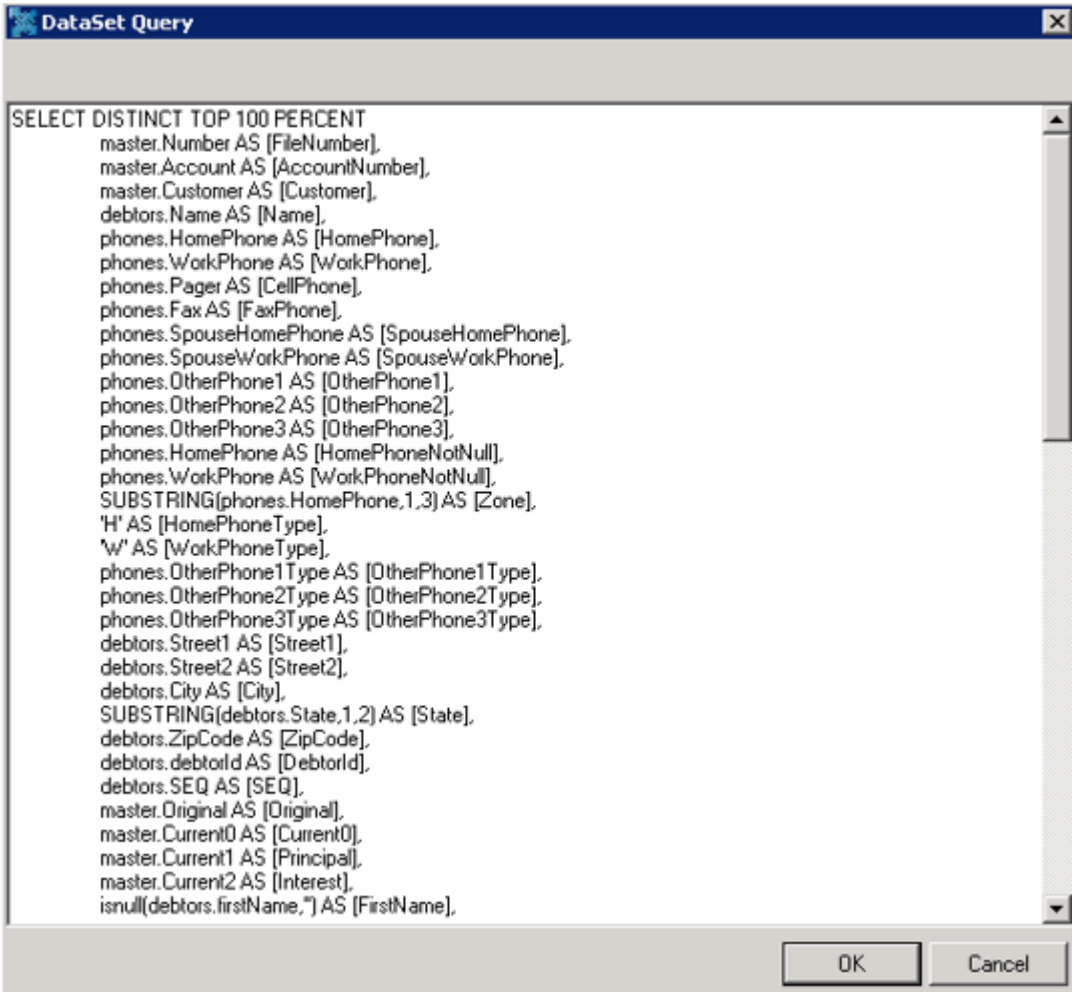
2. Open a text editor and paste the contents of the Clipboard.

## View SQL Statement for a Query

Use the **DataSet Query** window to view the SQL statement for the query that you have open.

**To view the SQL statement for a query**

1. In the menu bar, click **Help** and then click **Show Query**. The **DataSet Query** window appears.




2. When finished viewing, click **OK**.

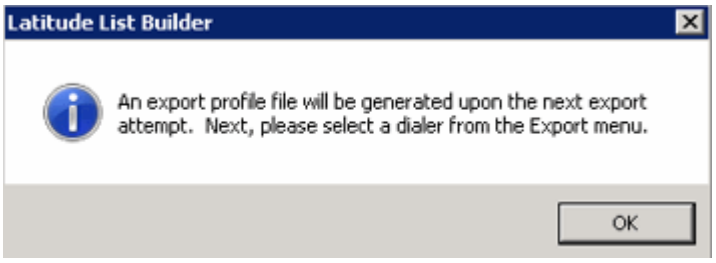
## Create Export Profile

Use the **Latitude List Builder** dialog box to export the query results to a file and create an export profile. The export profile contains the name of the dialer vendor and the query results to associate to it.

**Note:** Ensure that you logged on to List Builder using Administrator rights.

**To create an export profile**

1. In the menu bar, click **Help** and then click **Save Export**. A notification dialog box appears.




2. Click **OK**.
3. In the menu bar, click **Export File** and then click a dialer vendor. The **Save As** dialog box appears.
4. In the **File name** box, type a name for the query results file and then click **Save**. The **Save Export Package** dialog box appears.
5. In the **File name** box, type a name for the export profile and then click **Save**.