



List Builder

Printable Help

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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.

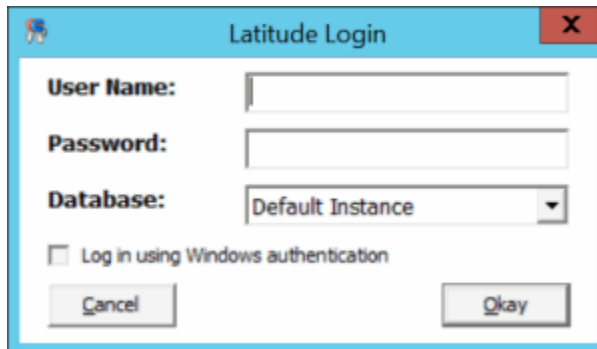
Latitude can run List Builder in a "quiet" mode, with no user interface, from a Windows Task Scheduler command script. A command-line argument added to List Builder accepts a string, which is a set of saved dialer configuration settings as stored in the Latitude policy objects. The argument allows you 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.

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.

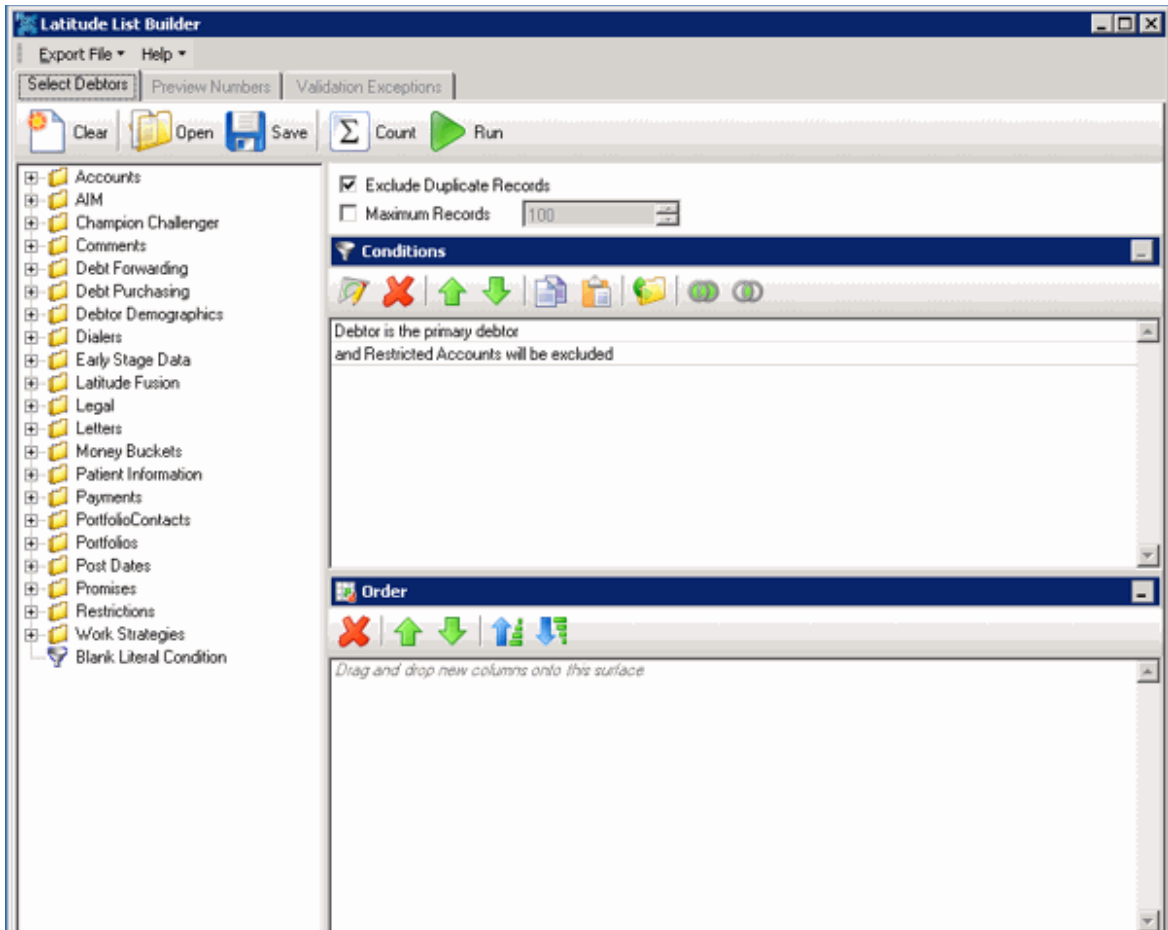


User Name: Your Latitude user name.

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.

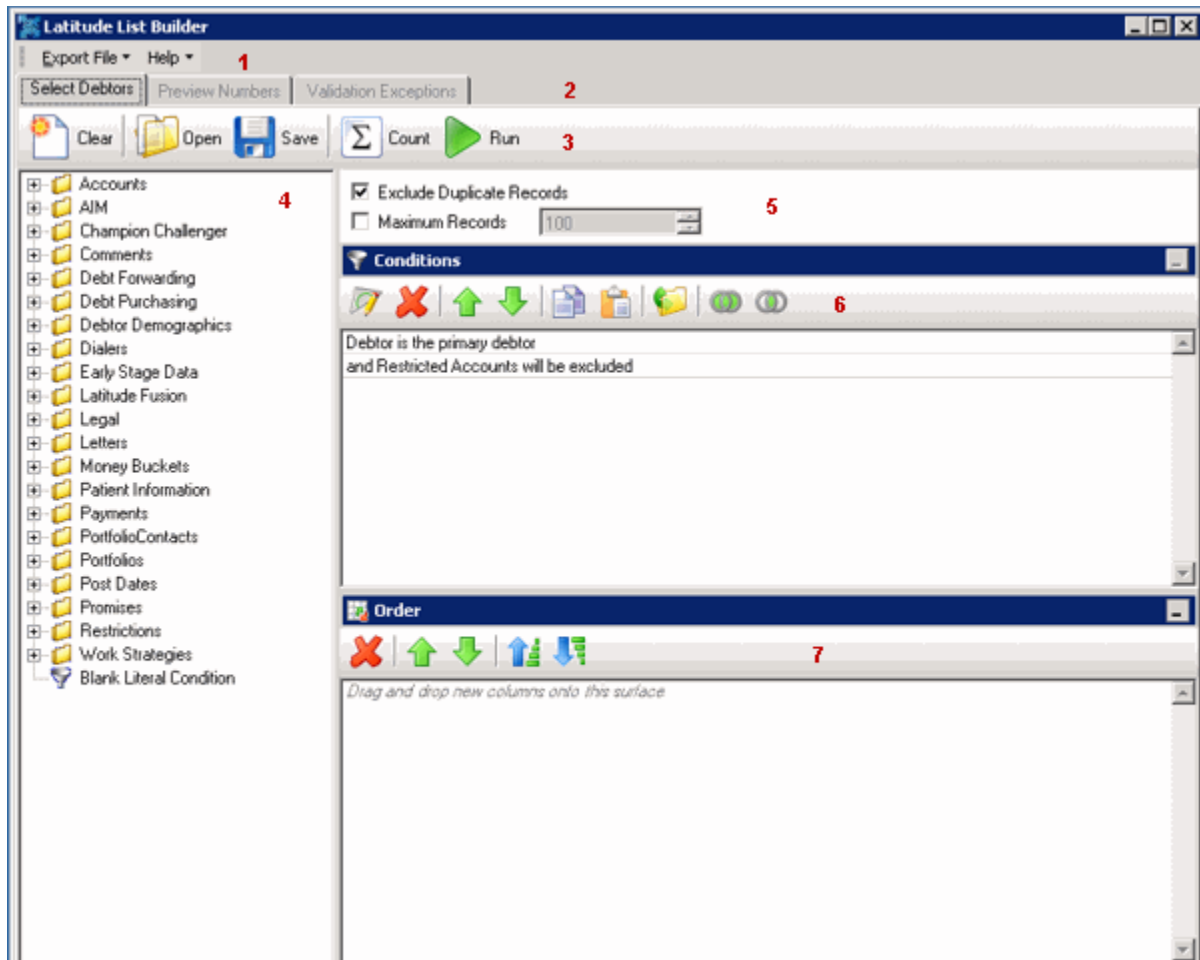


Queries

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.

Query Conditions

Query Conditions

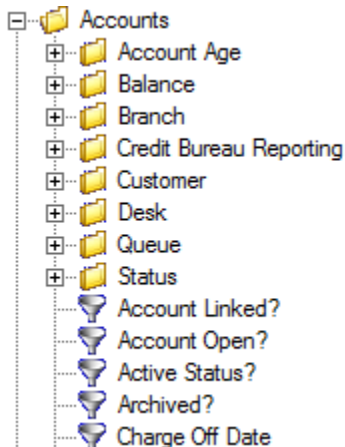
Use the **Conditions** pane in the **Latitude List Builder** window to specify the criteria for data to include in the query results.

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.

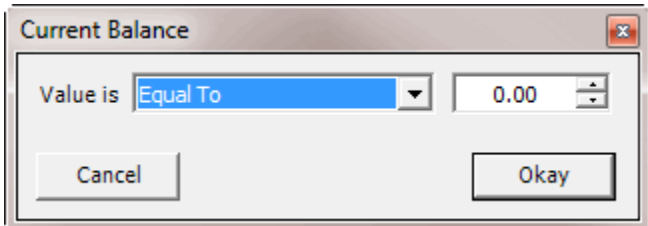
To create a query condition

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

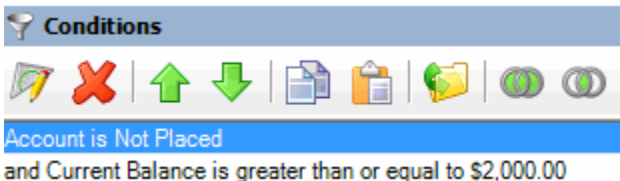


2. Click the data item for which to set a condition and drag and drop it in the **Conditions** pane. A dialog box appears, which allows you to specify the criteria. The title of the dialog box and the information displayed depend on the condition selected.

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."



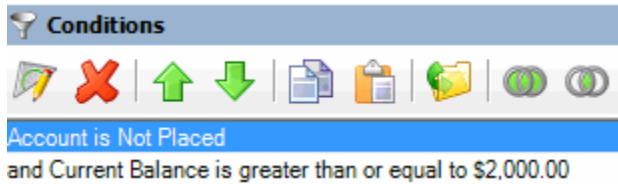
4. Continue specifying conditions as necessary.

Modify a Query Condition

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

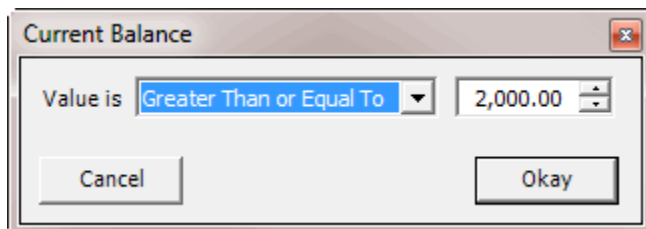
To modify a query condition

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.



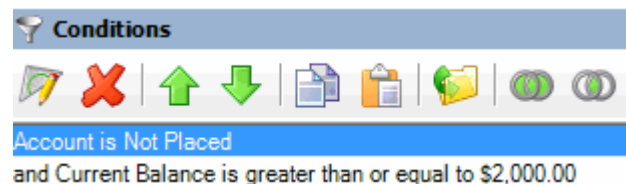
3. In the dialog box, modify the criteria and then click **Okay**. The **Conditions** pane reflects the update.

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.

- Right-click where you want to copy the condition and then click **Paste**.

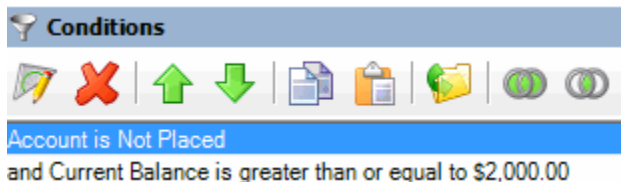
The system pastes the condition in the specified location.

Group Query Conditions

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

To group query conditions

- Go to the **Conditions** pane.



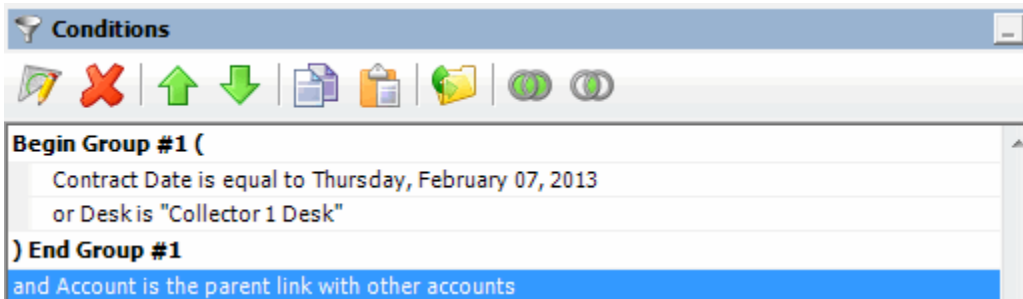
- Click the conditions to group.

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**.

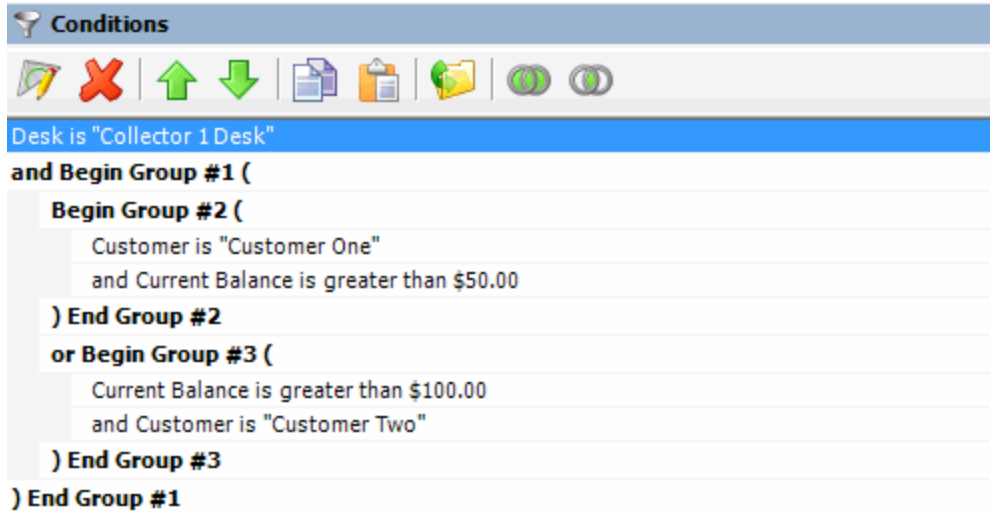
- Do one of the following:

- 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.



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

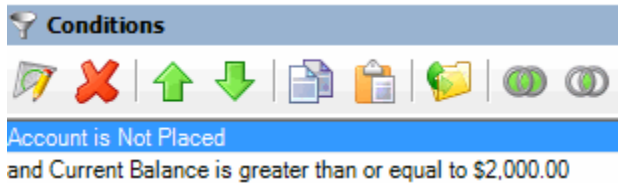


Modify the Query Condition Order

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.



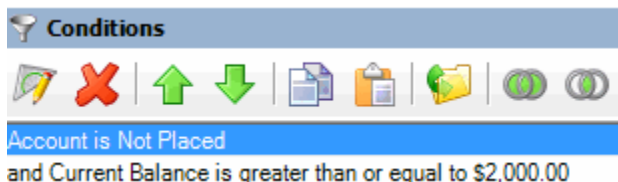
2. To move up a condition in the list, click the condition and then, in the toolbar, click the up arrow.
3. To move down a condition in the list, click the condition and then, in the toolbar, click the down arrow.

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.



- 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."

- To change the query to require both conditions 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 AND icon.
- Right-click the second condition and then click **Set Condition Required**.

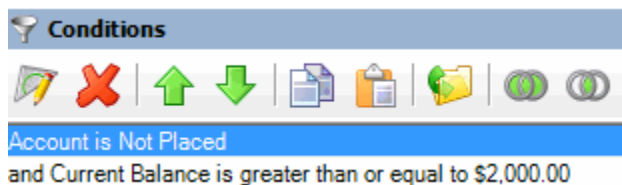
The condition changes from "or" to "and."

Delete a Query Condition

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

To delete a query condition

- Go to the **Conditions** pane.



- 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.

- Click **Yes**.

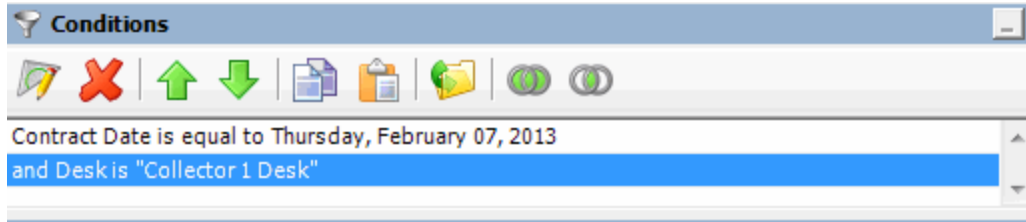
Boolean Operators

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

AND condition

The AND condition sets a condition to required.

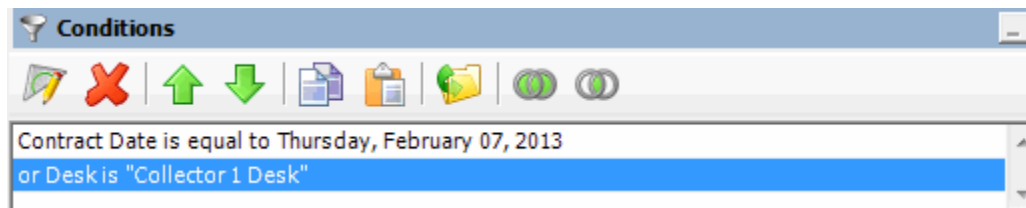
In the following example, both conditions must be true for an account to appear in the query results. So, if an account contract date is "February 7, 2013" and the Desk is "Collect 1 Desk," the query results include the account. If an account contract date is "February 7, 2013" but the Desk is not "Collect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

Value is	Description
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.

Closed Date

Value is: Equal To Relative: 1/ 1/2012

Buttons: Cancel, Okay

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.

Closed Date

Value is: Between Relative: 1/ 1/2012

and

Relative: 2/ 1/2012

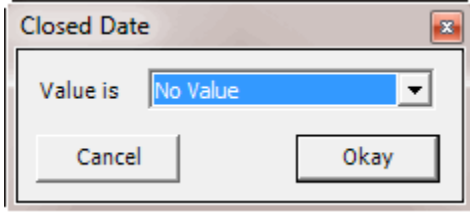
Buttons: Cancel, Okay

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).



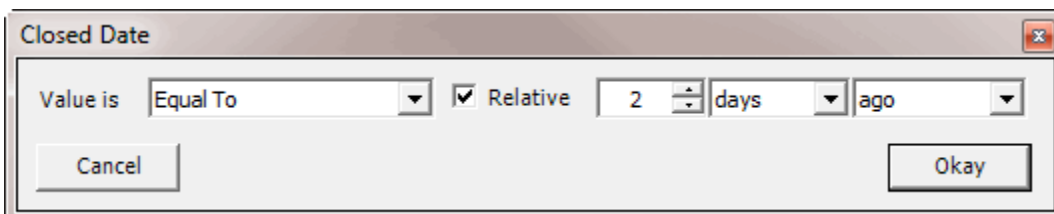
Relative date

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:

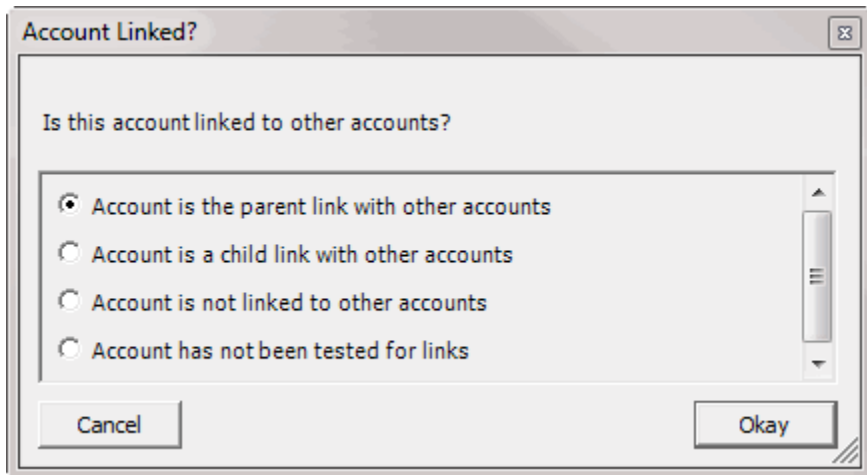
Value is	Description
Equal To	Retrieves accounts where the date matches the relative date.
Not Equal To	Retrieves accounts where the date does not match the relative date.
Later Than or Equal To	Retrieves accounts where the date matches or comes after the relative date.
Earlier Than or Equal To	Retrieves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



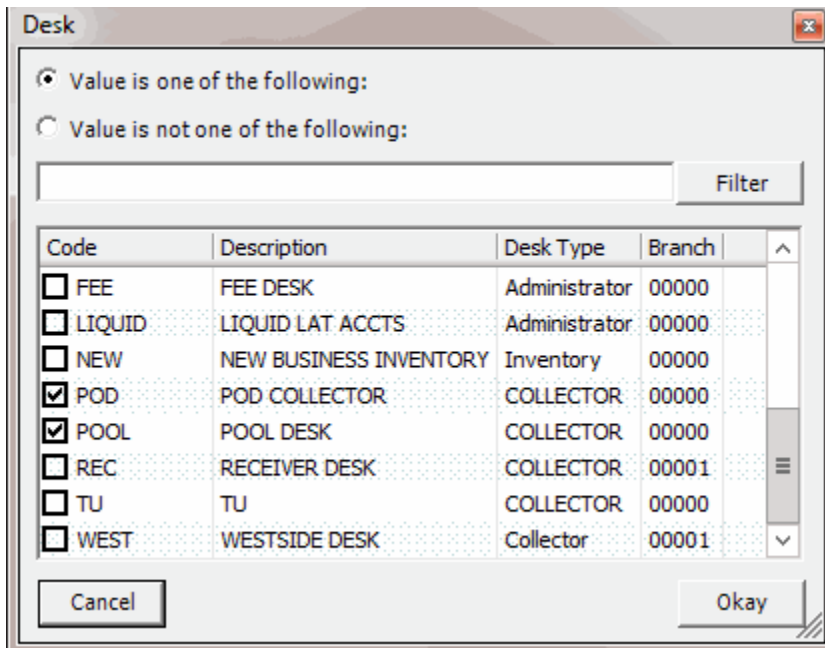
Single option

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

Query Order

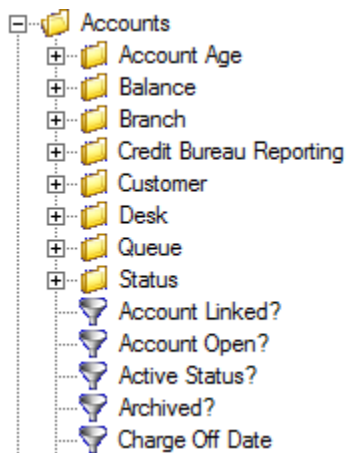
Use the **Order** pane to specify the sort order for the data returned in the query results. For example, if the **Order** pane includes desk and customer, the system sorts the query results first by desk and then by customer within the desk.

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.

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.

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**.

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**.

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

Query Results

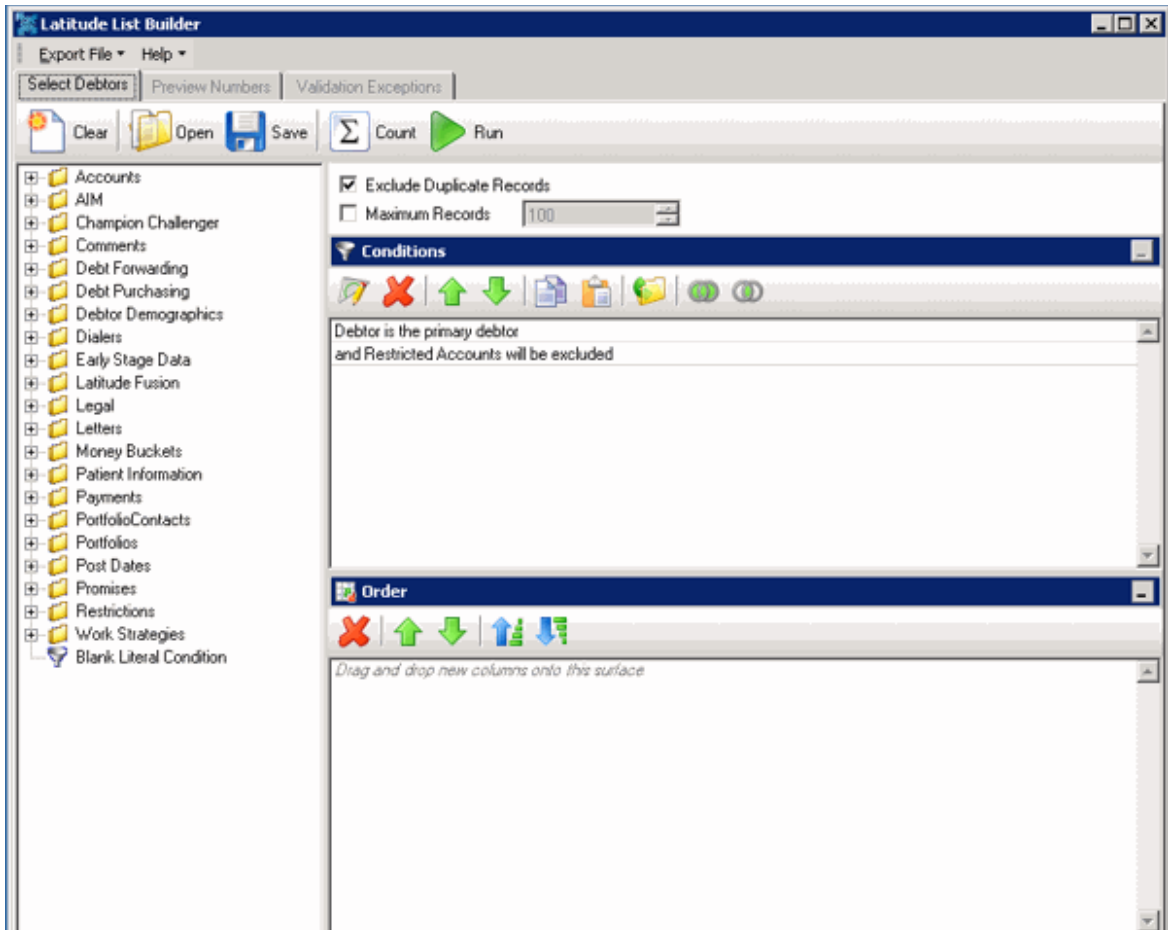
Use the **Preview Numbers** tab to view the results of a query, and change the view.

Run a Query

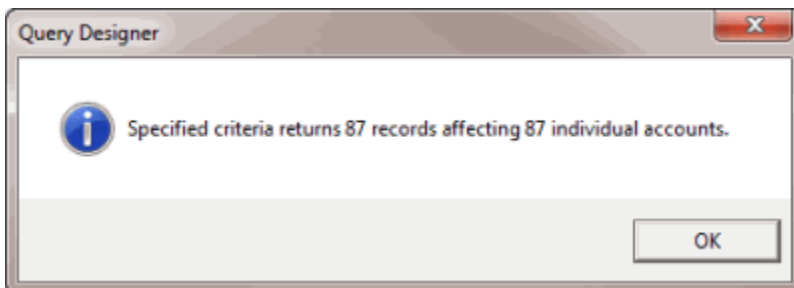
Use the **Preview Numbers** tab to view the results of a query.

To run a query

1. Open a query.

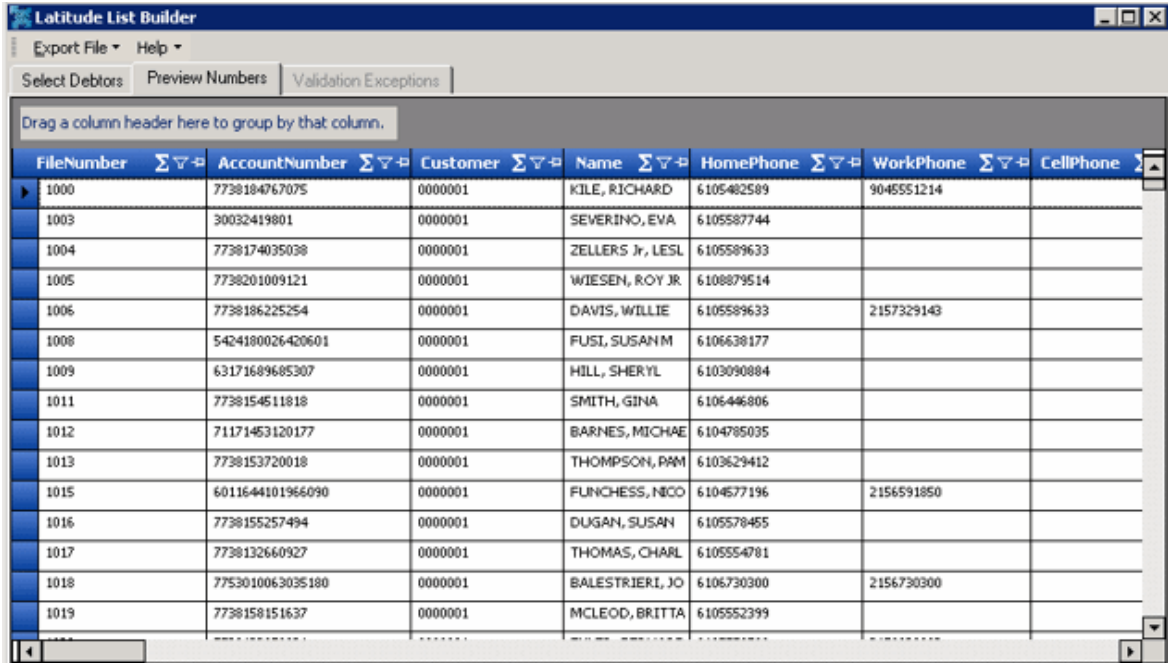


2. To count the number of records that match the criteria, do the following:
 - a. In the toolbar, click **Count**. The **Query Designer** dialog box appears.



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

List Builder Printable Help



Latitude List Builder

Export File Help

Select Debtors Preview Numbers Validation Exceptions

Drag a column header here to group by that column.

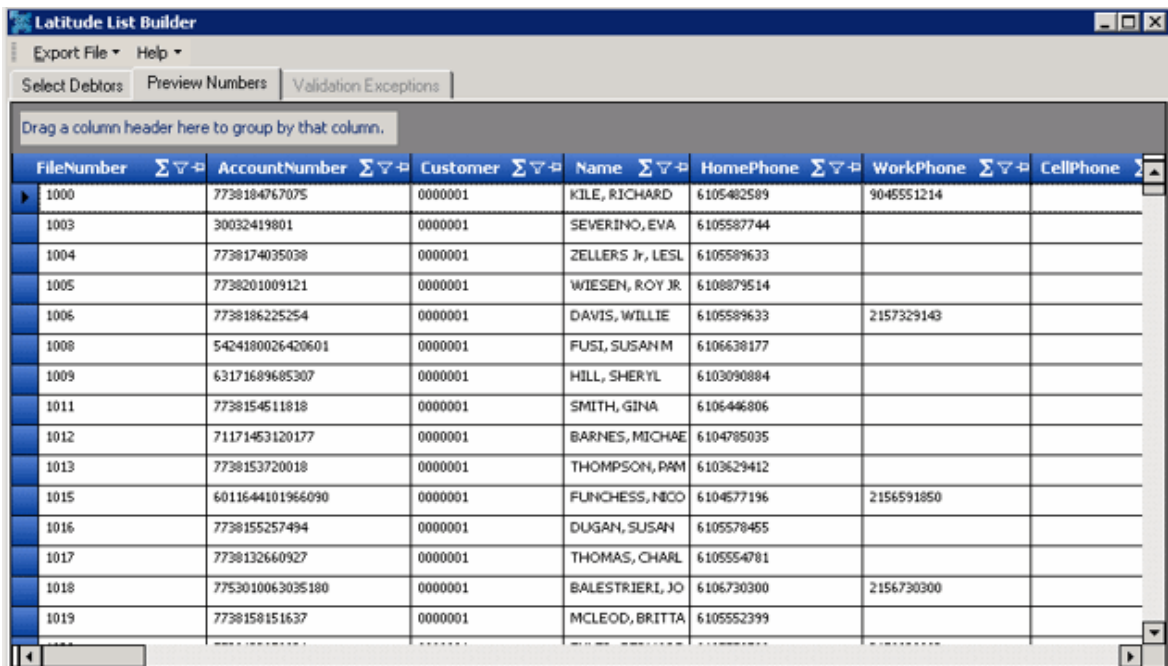
FileNumber	AccountNumber	Customer	Name	HomePhone	WorkPhone	CellPhone
1000	7738184767075	0000001	KILE, RICHARD	6105482589	9045551214	
1003	30032419801	0000001	SEVERINO, EVA	6105587744		
1004	7738174035038	0000001	ZELLERS Jr, LESL	6105589633		
1005	7738201009121	0000001	WIESEN, ROY JR	6108879514		
1006	7738186225254	0000001	DAVIS, WILLIE	6105589633	2157329143	
1008	5424180026420601	0000001	FUSI, SUSANM	6106638177		
1009	63171689685307	0000001	HILL, SHERYL	6103090884		
1011	7738154511818	0000001	SMITH, GINA	6106446806		
1012	71171453120177	0000001	BARNES, MICHAEL	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		

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.



Latitude List Builder

Export File Help

Select Debtors Preview Numbers Validation Exceptions

Drag a column header here to group by that column.

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, SUSANM	6106638177		
1009	63171689685307	0000001	HILL, SHERYL	6103090884		
1011	7738154511818	0000001	SMITH, GINA	6106446806		
1012	71171453120177	0000001	BARNES, MICHAEL	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. Click a column heading and drag it to the new location.

- When two red arrows appear in the location where you want to place the column, release your mouse button.

Drag a column header here to group by that column.

Number	Desk	Number	tate
1000	0000000	KILE, RICHARD	PA
1003	0000000	SEVERINO, EVA	PA
1004	0000000	ZELLERS Jr, LES	
1005	0000000	WIESEN, ROY	PA

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

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

Latitude List Builder

Export File Help

Select Debtors Preview Numbers Validation Exceptions

Drag a column header here to group by that column.

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, MICHAEL	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		

- In the column heading, click the Pushpin icon. The pushpin points down to indicate that the column is pinned.
- 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

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

Latitude List Builder

Export File Help

Select Debtors Preview Numbers Validation Exceptions

Drag a column header here to group by that column.

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, MICHAEL	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. 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.

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.

Latitude List Builder

Export File Help

Select Debtors Preview Numbers Validation Exceptions

Drag a column header here to group by that column.

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, MICHAEL	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. 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.

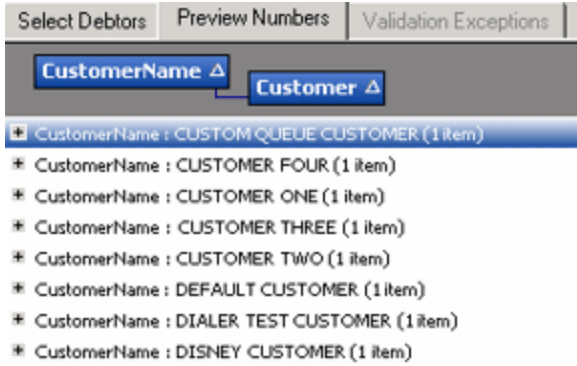
Select Debtors Preview Numbers Validation Exceptions

CustomerName

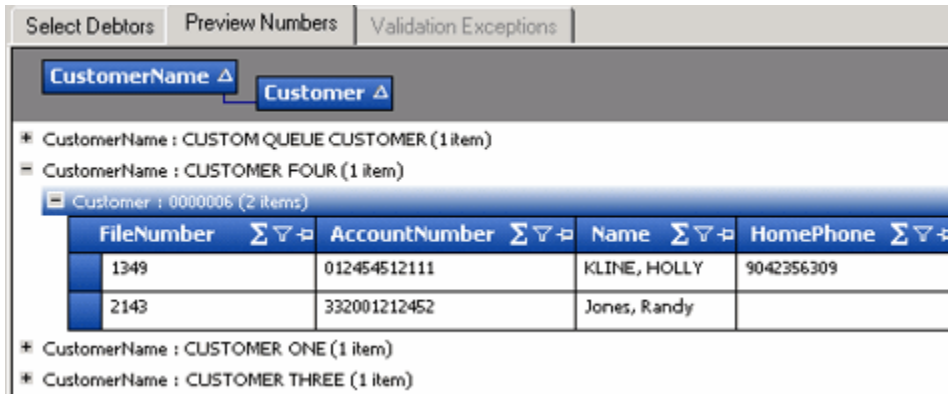
CustomerName : CUSTOM QUEUE CUSTOMER (23 items)

- * CustomerName : CUSTOMER FOUR (2 items)
- * CustomerName : CUSTOMER ONE (445 items)
- * CustomerName : CUSTOMER THREE (14 items)
- * CustomerName : CUSTOMER TWO (6 items)
- * CustomerName : DEFAULT CUSTOMER (10 items)
- * CustomerName : DIALER TEST CUSTOMER (21 items)

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:
 - a. Click the plus sign (+) next to the group to expand it.
 - b. 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.

Latitude List Builder

Export File Help

Select Debtors Preview Numbers Validation Exceptions

Drag a column header here to group by that column.

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, MICHAEL	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		

- 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.

Select Summaries

Average

Count

Maximum

Minimum

Sum

OK Cancel

- 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.

List Builder Printable Help

	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...	

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.

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, SUSANM	6106638177		
1009	63171689685307	0000001	HILL, SHERYL	6103090884		
1011	7738154511818	0000001	SMITH, GINA	6106446806		
1012	71171463120177	0000001	BARNES, MICHAEL	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 to filter, click the Funnel icon. A list of options for the specified column appears.

Customer	SSN
(All)	
(Custom)	
(Blanks)	
(NonBlanks)	999887777
0000000	999988777
0000001	124588812
0000002	789787897
0000003	

(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.

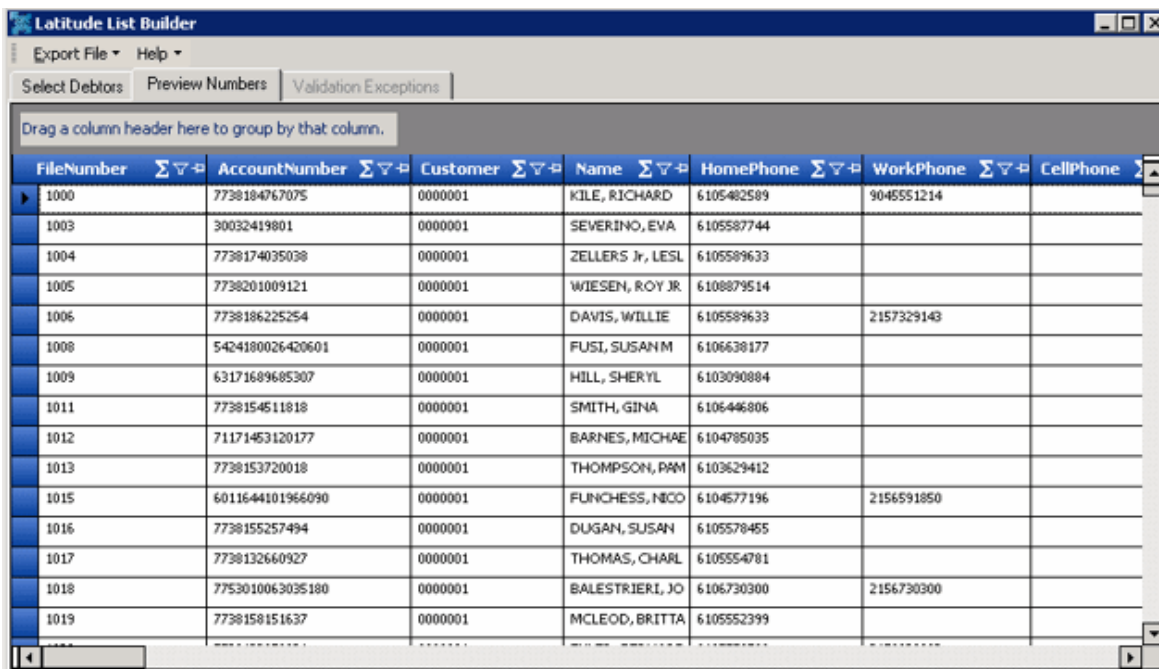
3. Click any value other than **(Custom)**. The list closes and the query results only include the records that match the specified filter.
4. To set custom filter criteria, do the steps to [Set Custom Filter Criteria](#).

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.

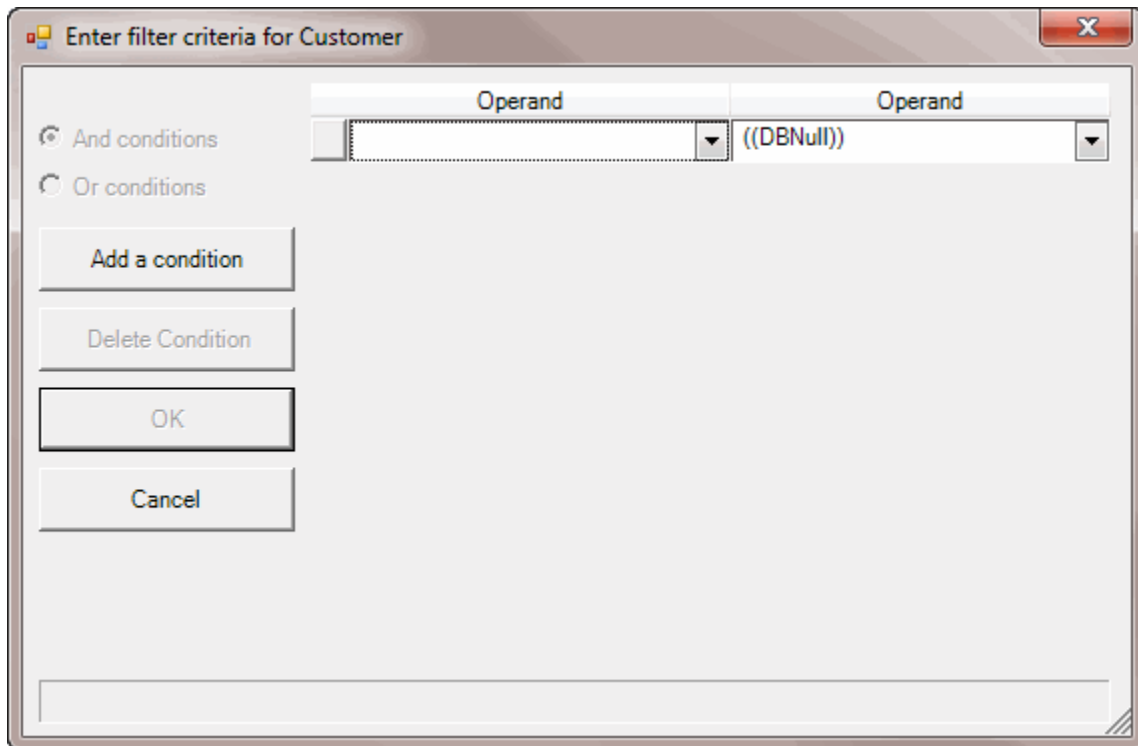


FileNumber	AccountNumber	Customer	Name	HomePhone	WorkPhone	CellPhone
1000	7738184767075	0000001	KILE, RICHARD	6105482589	9045551214	
1003	30032419801	0000001	SEVERINO, EVA	6105587744		
1004	7738174035038	0000001	ZELLERS Jr, LESL	6105589633		
1005	7738201009121	0000001	WIESEN, ROY JR	6108879514		
1006	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, MICHAEL	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 of the column to filter, click the Funnel icon. A list of options for the specified column appears.

Customer	SSN
(All)	
(Custom)	
(Blanks)	
(NonBlanks)	999887777
0000000	999988777
0000001	124588812
0000002	789787897
0000003	

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



- In the first **Operand** list box, click an operator. For more information, see [Custom Filter Operators](#).
- 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.
- To add conditions, click **Add a condition**. A blank row appears.
- To delete a condition, click the condition and then click **Delete Condition**.
- 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. 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. This operator is for date and numeric data types only.
Greater than	Include accounts where the data is greater than the specified value. 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. This operator is for date and numeric data types only.
Like	Includes accounts where data matches the specified pattern. This operator is for alphanumeric data types only.
Matches Regular Expression	Includes accounts where the system stores data in the specified format. This operator is for alphanumeric data types only. $^{\wedge}$ [A-Z] finds all values in uppercase character format only. $^{\wedge}$ [a-z] finds all values in lowercase character format only. $^{\wedge}$ [0-9] finds all values in numeric format only. $^{\wedge}$ [A-Za-z] finds all values in mixed case character format. $^{\wedge}$ [A-Za-z] finds all values in mixed case character format. $^{\wedge}$ [^0-9]+\$ finds all values with a numeric format and dollar sign.

Operator	Description
	<code>^[A-Za-z0-9] [A-Za-z0-9_]*\$</code> finds all values of mixed case and currency.
Starts with	Includes accounts where data starts with the specified character or characters. This operator is for alphanumeric data types only.
Contains	Includes accounts where data contains the specified character or characters. This operator is for alphanumeric data types only.
Ends with	Includes accounts where data ends with the specified character or characters. 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. This operator is for alphanumeric data types only.
Does not contain	Includes accounts where data does not contain the specified character or characters. 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. This operator is for alphanumeric data types only.
Does not match	Includes accounts where data does not match the specified character or characters. This operator is for alphanumeric data types only.
Not like	Includes accounts where data is not like the specified pattern. This operator is for alphanumeric data types only.

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.

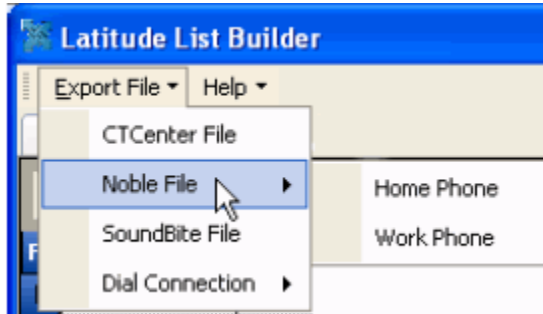
To create a dialer file

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, MICHAEL	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:

a. 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.

- In the **File name** box, type a name for the file.
- 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.
- Click **OK**.

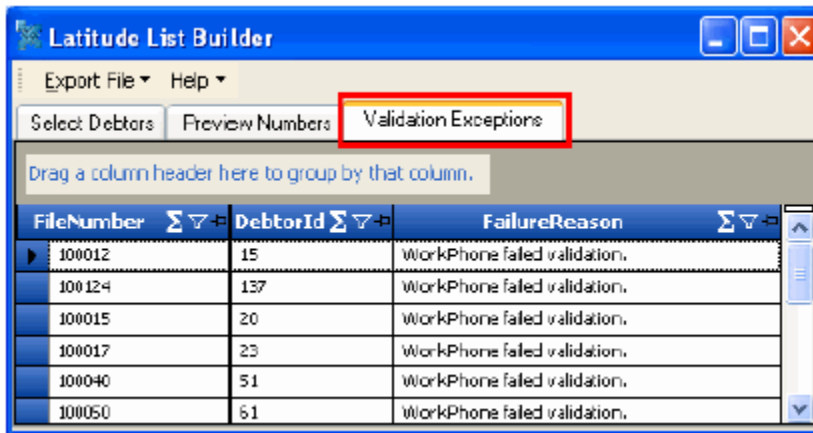
View Validation Exceptions

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

List Builder Printable Help

- 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

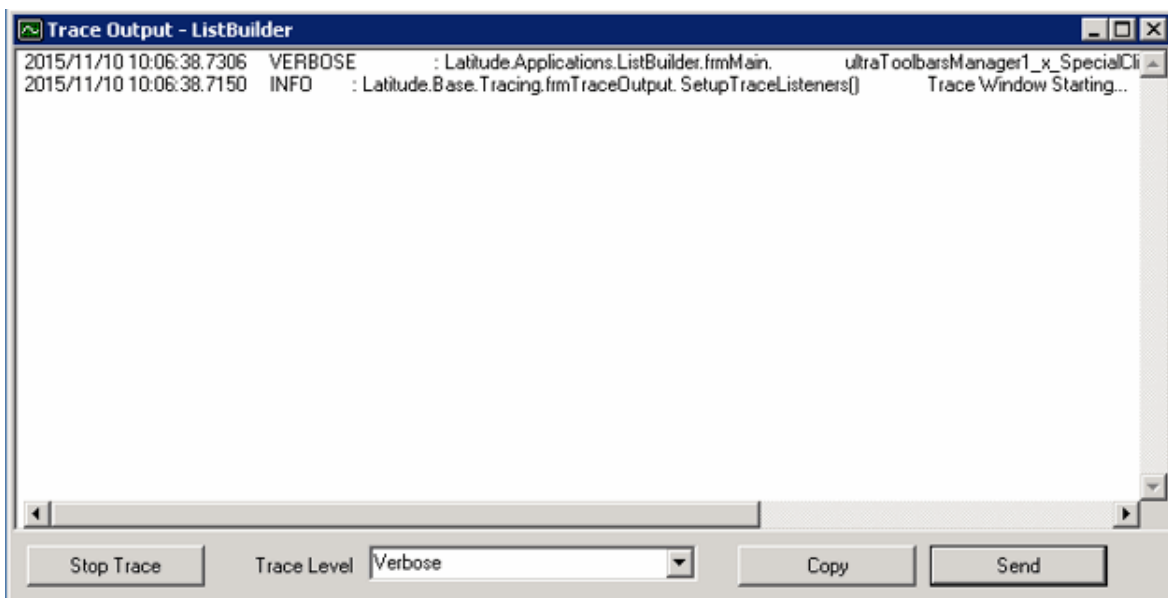
Use the **Trace Output** window to view the raw output of List Builder actions and determine whether an operation succeeded or failed. In the **Trace Output** window, you can do the following:

- 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.

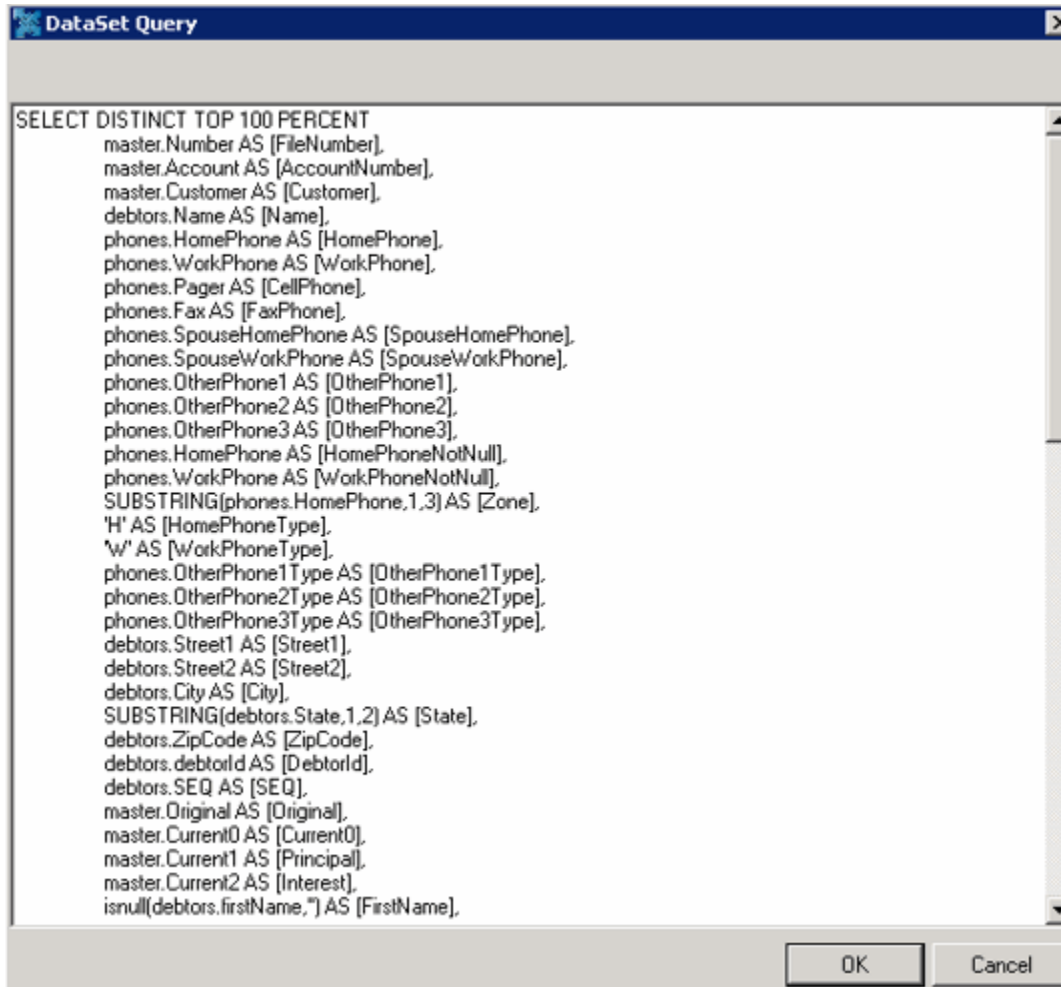
5. To copy the trace output to the Clipboard and paste it in a text editor, do the following:
 - a. Click **Copy**.
 - b. Open a text editor and paste the contents of the Clipboard.

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**.

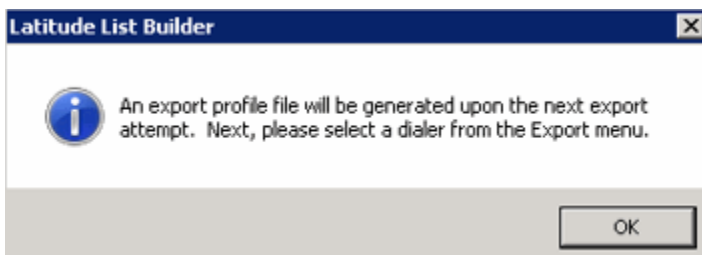
Create Export Profile

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**.

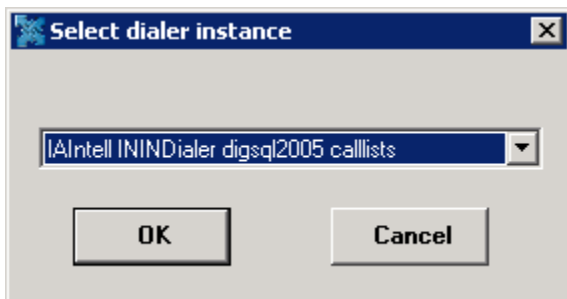
3. In the menu bar, click **Export File** and then click a dialer vendor. The **Save As** dialog box appears.
4. In the **File name** box, type a name for the query results file and then click **Save**. The **Save Export Package** dialog box appears.
5. In the **File name** box, type a name for the export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

Set up Dialer Server in List Builder

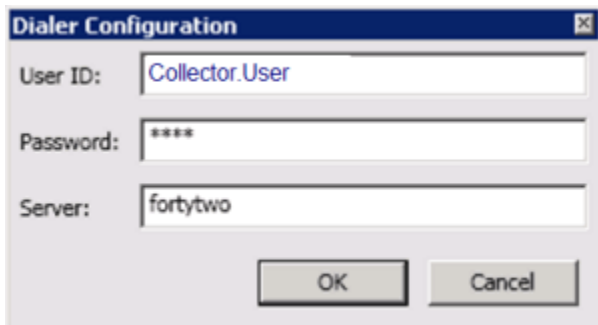
Use the **Dialer Configuration** dialog box to specify the credentials for logging on to a dialer server.

To set up dialer server in List Builder

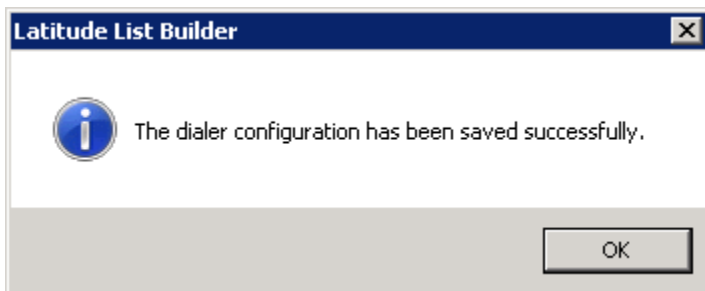
1. In the menu bar, click **Help** and then click **Setup Dialer**. The **Select Dialer Instance** dialog box appears.



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



3. Type the appropriate logon credentials and then click **OK**. A notification dialog box appears.



4. Click **OK**.