CX Contact Help

Create and Manage List Rules

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Contents

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Important

The content of this document has been moved and is no longer being updated in this location.
For the latest content and most recent updates, see the CX Contact Help on the Genesys Multicloud site.

Use the List Rules feature to apply a set of rules to a contact list. There are three types of list rules:

- Selection rules - used to target specific records in a list based on filtering criteria. Only records that satisfy the criteria are imported.
- Upload rules - used to apply record splitting options to a contact list at the time of upload. Splitting criteria can be based on quantity, percentage, field, or custom criteria.
- Filtering rules - used to target specific records in a list based on filtering criteria. These rules can be applied dynamically, while a campaign group is running. They do not need to be created at the time a list is being imported into CX Contact.
- Import rules - used to import all list rules (Selection, Upload and Filtering).

This page describes how to create list rules. It also explains how to edit, delete, and duplicate a list rule.

Create a Selection Rule

To create a new selection rule, go to the **Rules** page and select **New -> Selection Rule**.

On the **Selection Rules** page, start by naming the selection rule.

Then, from the **Type** menu, select the type of selection rule you want to apply:

- Contacts - The selection rule applies to a contact list.
- Suppression - The selection rule applies to a suppression list.
- Advanced - The selection rule applies to a contact list export and filtering rules.

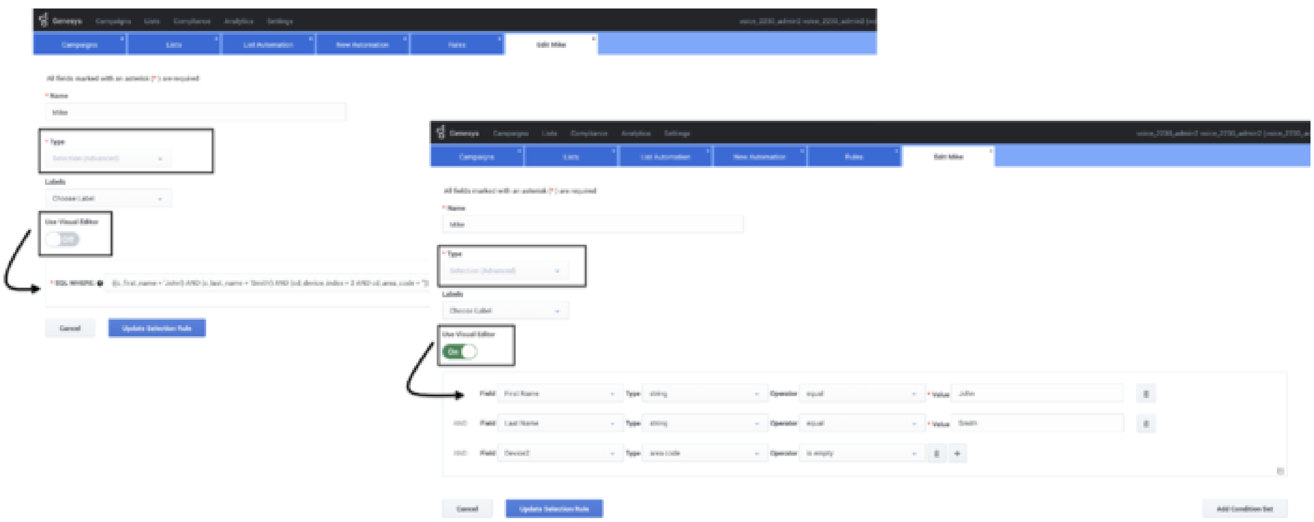
From the **Labels** menu, you can apply a labeling schema. The labels defined in the schema will replace the default labels in the **Field** menu. See Create or Manage User Field Labels for more information about labels.

If you selected **Selection (Advanced)** as the rule type, the **Use Visual Editor** switch is enabled.

Switch this to the **Off** position if you want to enter a raw SQL WHERE clause rather than use the default visual editor to define the filtering criteria. For example, type `Country='Mexico';` to select records containing Mexico in the Country field.

Important

If the Visual Editor is switched off after you enter selection criteria using the Visual Editor, the active content will be converted into raw SQL. As a result, the transition between the Visual Editor and raw SQL is made easier. The ability to transition back to the Visual Editor will not be possible after the SQL is manually edited.



Now, define the filtering criteria, as follows:

- Field - If you want to filter a list by a particular field in your list, select the field here. The fields populated depend on the type of selection rule being applied:

Contacts Suppression Advanced

- Type - These options vary, depending on the Field selection.
- Operator - Select the operator available with the selected Field.
- Value - Enter a defining value to search for in that field.

This table describes the supported operators for each Field Type.

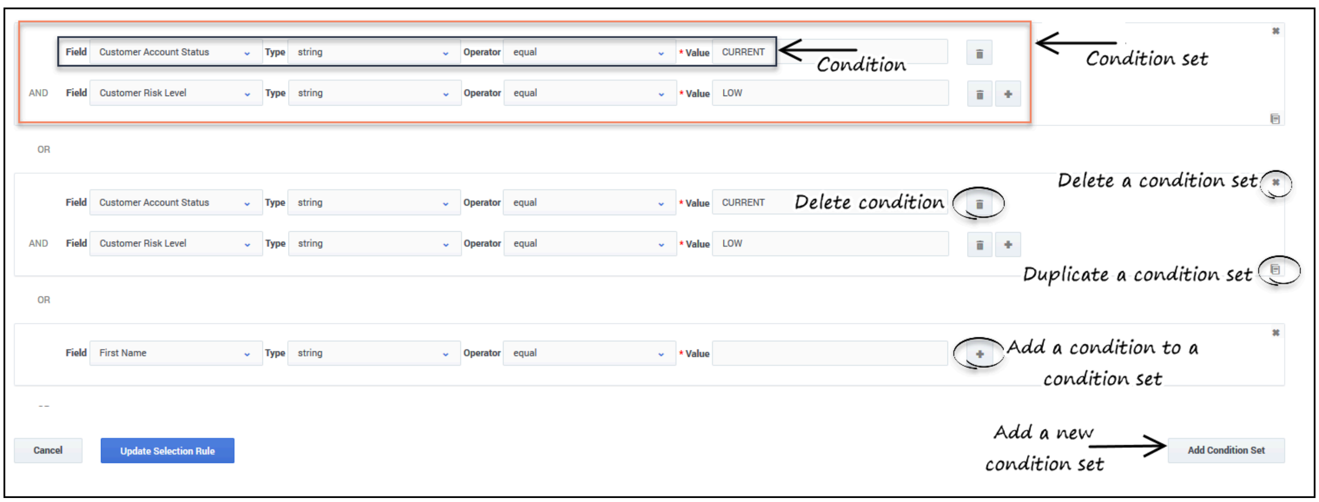
	String	Numeric	Area Code	Country Code	Timezone	Exchange	State Code
Equal	●	●	●	●	●	●	●

	String	Numeric	Area Code	Country Code	Timezone	Exchange	State Code
Not Equal	●	●	●	●	●	●	●
Like	●						
Not Like	●						
In	●		●	●	●	●	●
Not In	●		●	●	●	●	●
Is Valid			●	●	●	●	●
Is Not Valid			●	●	●	●	●
Is Empty	●		●	●	●	●	●
Is Not Empty	●		●	●	●	●	●
Contains	●						
Does Not Contain	●						
Custom JS Expression	●	●					
Less Than		●					
Less Than or Equal		●					

	String	Numeric	Area Code	Country Code	Timezone	Exchange	State Code
Greater Than		●					
Greater Than or Equal		●					

> **Important**
>
> **is valid** and **is not valid** operators can be use to validate the area code, exchange, timezone and state codes of an individual device against the global numbering plan in the compliance data.

Conditions and Condition Sets



A condition is the filtering criteria you define for a selection rule (Field, Type, Operator, and Value). When you add multiple filtering criteria to a rule, that becomes a condition set. Each condition within the set is separated by the AND operation. You can work with conditions and condition sets in CX Contact in the following ways:

- To add a condition to a condition set, click the (**+**) next to the filtering criteria. A new line of filtering criteria appears.
- To add a new condition set, click **Add Condition Set**. Each condition set is separated by the OR operator.

- To duplicate an existing condition set, click the document icon in the bottom right corner of the existing condition set. All selected fields from the existing condition set automatically populate in the duplicated condition set.
- To delete a condition, click the trash can icon next to the condition.
- To delete a condition set, click the X in the upper right-hand corner of that condition set.

Example	If you want to extract all customers with the last name Smith with a 506 area code from the existing contact list, specify the following: • Field - Last Name • Type - String • Operator - Equal • Value - Smith Now click the plus sign (+) and specify the following: • Field - The relevant Device (Device1, for example) • Type - Area code • Operator - Equal • Value - 506

When you're finished creating the selection rule, it will appear in the table of list rules on the main **List Rules** page. Then, when you create an upload rule, you can apply the selection rule to the list being uploaded.

Create an Upload Rule

Use an upload rule to apply splitting criteria to create additional contact lists.

To create a new upload rule, from the **Rules** page, select **New -> Upload Rule**.

On the **Upload Rules** page, specify a name for the rule.

Then, from the **Type** menu, select the type of selection rule you want to apply:

- Contacts - The upload rule applies to a contact list.
- Suppression - The upload rule applies to a suppression list.

If you want to use a specification file, set the **Specification File** switch to the **On** position and select a specification file from the **Specification File** menu. If you want to use a data mapping schema, set the **Specification File** switch to the **Off** position and choose a data mapping schema to the **Data**

Mapping menu.

> **Important**
> When you upload a file, the input specification is applied before the splitting rule occurs.

At this point, you can do one of two things:

- Option 1 (available for either type of rule): In the **Selection Rules** section, apply an existing selection rule to the list being uploaded. To do that, select the rule from the **Selection Rule** menu. Notice that only the selection rules matching the rule **Type** (Contacts or Suppression) populate in the **Selection Rule** menu.
- Option 2 (available for **Upload (Contacts)** rules only): Check the **Use Splitting** box to split the contacts into targeted lists. See the Splitting Criteria section below for more information.

Splitting Criteria

> **Important**
> This option is only available if you selected **Contacts** from the **Rule Type** menu.

Splitting criteria determines how a contact list will be split into targeted lists. There are three types of splitting criteria, plus an option to customize the split based on previously-defined selection rules.

- Split by quantity – Specify how many contacts from the uploaded file will appear in each new list. If the original list size is not a multiple of the quantity specified, then the final list will contain the remainder of the contacts.
- Split by percent – Specify the percent of contacts from the uploaded file that will appear in each new list. If the percentage specified is not a factor of 100, the final list will contain the remainder.
- Split by field – Split the file by unique contacts in the specified field. For example, “create a separate new list for each unique value contained in the Other3 field.” **Note:** If you created labels for user fields (Other1-OtherN) and you selected the Display option when you created those labels, the new defined labels will replace the Other labels in this menu. See Create or Manage User Field Labels for more information.
- Custom – This allows you to split the file using previously-defined selection rules. Once you select the **Custom splitting** option, all available selection rules populate in a new menu, labelled **List rule 1**. All the rules listed in this new menu will be an exact match to all selection rules listed in the **List Rules** section of CX Contact. You can use any of these selection rules to split a contact list.

Select **Create remainder file** when you want the remaining records not included in a selection rule criterion to go into a separate contact list.

Apply Multiple Selection Rules

Link to video

You can use the plus sign (+) icon next to a rule to create additional contact lists by applying additional selection rules to the splitting criteria (the short video demo to the left shows you how). If you do this, the system will move through the list of rules sequentially, starting with List rule 1, then List rule 2, and so on, and look for records matching that rule. **Note:** You can only choose one selection rule per contact list.

To change the order of the selection rules, simply hover over any selection rule (List rule 1, List rule 2, etc.) and drag it to the new location within the list.

To delete any selection rule from the splitting criteria, click the trash can icon next to that rule.

The **Use Waterfall** rule option is enabled by default so that when the system matches a record to a selection rule, it will stop attempting to match that record to subsequent selection rules. If you disable this option, the system will attempt to match a single record to all selection rules, meaning that the record could potentially be duplicated in contact lists.

Output Name Formats

When you select **Custom splitting**, you must specify an output name format. The following naming conventions are supported for this field.

Token	Replaced with
LIST	Constant part of the contact list name, as provided via API call
yyyy	Current year with century as a decimal number (ex. "2017")
MM	Current month number as zero-padded decimal number (ex. "05", "08", "11")
dd	Current day in month number as zero-padded decimal number (ex. "07", "31")
hh	Current hour (24-hour clock) as a zero-padded decimal number (ex. "17", "00", "08")
mm	Current minutes as a zero-padded decimal number (ex. "59", "01", "19")
%d	Sequential part number of the generated list
ACCOUNT	Tenant Name in human readable form
%v	Value of the contact field used for splitting on (ex. "CA" if splitting by State)
%r	Rule name for the corresponding custom bucket

When you're finished creating the upload rule, it will appear in the table of list rules on the main List Rules page. Then, when you import a new list, you will have the option to apply the upload rule to the list being imported.

Create a Filtering Rule

Use filtering rules to target a subset of records within the contact list. Unlike selection rules and upload rules, filtering rules can be applied dynamically, while a campaign group is running. They do not need to be created at the time a list is being imported into CX Contact.

To create a filtering rule, go to the **Rules** page and select **New -> Filtering Rule**.

On the **New Filtering rule** page, start by naming the filtering rule.

Then, from the **Labels** menu, you can apply a labeling schema. The labels defined in the schema will replace the default labels in the **Field** menu. See Create or Manage User Field Labels for more information about labels.

At this point, you can do one of two things:

- Option 1: In the **Selection Rules** section, apply an existing selection rule to the list being uploaded. To do that, select the rule from the **Selection Rule** menu. **Note:** If there are no selection rules to choose from, you must use Option 2.
- Option 2: Check the **Use ordering** box to define the order in which records are processed and displayed in CX Contact. See the Ordering section below for more details.

Ordering

In this section, you can define how you want to order and display the records within a contact list. For example, if you want to display the records in ascending order based on Last Name, you would select the Last Name from the **Choose Field for Ordering** menu and then select Ascending.

You can optionally set the Use visual editor switch to Off to instead enter a SQL ORDER BY clause to define the order. For example, to sort in ascending order by Country, in the SQL ORDER BY field, enter `Country ASC;`

When you're finished creating the filtering rule, it will appear in the **Filtering Rules** menu on the **General** tab of a dialing profile, campaign template, or campaign group. You can apply it to any campaign group at any point, even while the campaign group is running.

Edit or Delete a List Rule

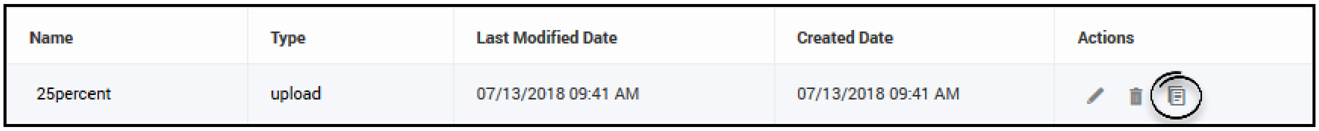
From the **Rules** page, you can edit or delete a rule:

- Edit - Click the pencil icon from the **Actions** menu.
- Delete - Click the trash can icon from the **Actions** menu or check the box to the left of the rule and click **Delete** (located at the top of the page, next to the **New** option).

Duplicate a List Rule

You can duplicate any selection or upload rule from the **Rules** page.

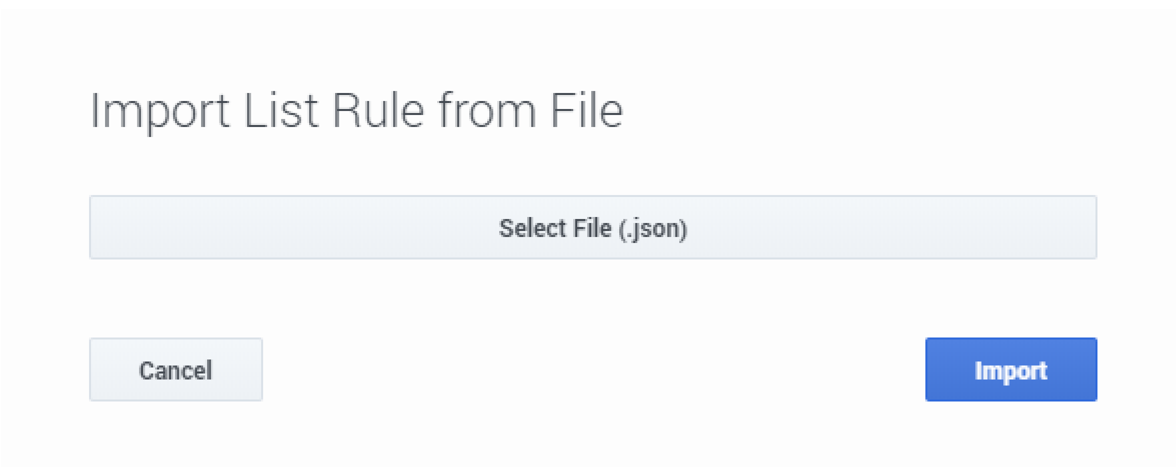
Locate the rule you want to duplicate, and from the **Actions** menu, click the document icon. A copy of the original rule opens. You can change any or all of the rule's properties, or leave the default properties, and then click **Update Rule**. The new rule will appear on the **List Rules** page.



Import Rules

To import a rule, select **Lists > List Rules** and click **Select file (.json)**.

Locate and select the **.json** file that contains the rules you want to import. Click **Open** and then **Import**. The imported rule will appear. You can edit the imported rule before saving it. You will then return to the **List Rules** page.



Related Topics

- Create and Manage Contact Lists
- Import Specification Files