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# eServices Manager Administrator's Guide

Screening rules

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- Administrator

Screening rules enable you to analyze messages so that you can decide how to handle them. This page describes screening rules and provides examples for common purposes.

### Related documentation:

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Screening rules scan an interaction and try to match either a destination address (who the message is going to, whether that is identified by an email address, a cell phone number, or some other parameter), a regular expression, or both. Screening is performed by Classification Server when it is triggered by a Screen Interaction object in a Routing Strategy.

A screening rule can optionally be associated with a Category.

You can cut, copy, paste, and delete screening rules as well as other eServices Manager objects.

### Important

Screening can operate on any interaction that has text somehow associated with it, whether as the body of the interaction (e-mail, chat), or otherwise (as user data, for example). In practice, it is expected that most interactions which are screened will be e-mail messages; therefore, the terms *e-mail* and *message* are used interchangeably here, to refer to these interactions. In fact, whatever is said here about e-mail applies to any interaction that has associated text.

### More information

See the following links for more information:

- How to create and test screening rules
- Screening rules reference—This section includes:
  - What screening rules check
  - The functions, arguments, and operators you can use
  - Regular expressions

### Examples of screening rules

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The following examples show screening rules you can use for typical purposes:

- Credit card number
- North American phone number
- Telltale words

### Example: Credit card number

To find text that includes a typical credit card number, you need to match a sequence of four groups of four digits, each group separated by - (hyphen):

```
\d\d\d\d\d-\d\d\d\d\d-\d\d\d\d\d-\d\d\d\d\d
```

#### Important

This regular expression also works without the \ (backslash) before the hyphens. However, it is better practice to write \- for the character hyphen, because the hyphen also has a special use in range expressions like [a-z].

Or if you want to allow for the possibility that some people will omit the hyphens, use? to make the hyphen optional:

```
\d\d\d\d\d-?\d\d\d\d\d-?\d\d\d\d\d-?\d\d\d\d\d
```

You could also use the repetition notation to shorten each \d\d\d\d\d to \d{4}.

### Example: North American phone number

North American phone numbers consists of ten digits, grouped into two groups of three and one of four. There are a number of ways for the groups to be separated:

- 203-555-1234
- (203) 555-1234
- (203)555-1234
- 203 555-1234
- 203.555.1234

The following regular expression matches all of the above:

```
(\d\d\d|(\d\d\d\d))[\s\.-]?s*\d\d\d[\s\.-]\d\d\d\d
```

#### Phone Number Regular Expression

Symbols	Meaning	Remarks
\d\d\d	Three digits	

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Symbols	Meaning	Remarks
<code>\d\d\d (\d\d\d)</code>	Three digits, or three digits enclosed in parentheses	<code>\</code> turns off the special meaning of the character (
<code>[\s\.-]?</code>	Space or period or hyphen or zero	Any one of the items enclosed in square brackets, either once or not at all
<code>\s*</code>	Zero or more spaces	
<code>\d\d\d</code>	Three digits	
<code>[\.-]</code>	Hyphen or period	Note again the need to use <code>\</code>
<code>\d\d\d\d</code>	Four digits	

### Example: Telltale Words

To screen for interactions from dissatisfied customers, you might try a regular expression like the following:

```
(not\s([a-z]+\s)*(pleased | satisfied)) | unhappy | complain
```

The first part of this expression matches "not" followed by zero or more words followed by "pleased" or "satisfied"; for example, "not" very pleased, not satisfied, not at all satisfied (but it also matches strings like "can not believe how pleased I am"). The rest matches the single words "unhappy" and "complain."