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CX Contact Help

CX Contact Current

12/30/2021

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CX Contact Help

Important

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For the latest content and most recent updates, see the CX Contact Help on the Genesys Multicloud site.

An omnichannel outbound campaign management solution that helps build better customer relationships

CX Contact is an omnichannel, outbound campaign management solution that enables you to proactively reach out to your customers in an agile and fully compliant way. It's designed to be easily managed by the business user, providing the agility your organization needs when it comes to how and when to communicate with customers and prospects.

CX Contact is equipped with a built in self-service, email and SMS content management system that enables easy and repeated use of pre-set campaign strategies. The list manager needs no database manipulation skills, and allows the users to easily set profiles and segments to leverage different contact strategies and channels. Every uploaded contact record enriched with global compliance data, enables the business users to consistently manage all regulatory requirements in global, regional or local level.

Proactive informational and personalized outreach not only creates long-lasting relationships, it can also help your operations by decreasing the volume of inbound calls into your contact center. When it comes to your outbound strategy, omnichannel engagement is critical because highly personalized, timely and relevant notifications sent using your customer’s preferred channel, makes engaging easy and drives customer loyalty.

Link to video

Use the links below or the table of contents to the left to access Help topics contained in this guide. If you're looking for something specific, use the Search box at the top of this page to search within the manual.

Help Topics

Introduction

Campaigns

Compliance

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CX Contact Basics

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The pages in this topic describe key concepts related to CX Contact. You should familiarize yourself with these concepts before jumping in to the CX Contact application.

Conceptual articles in this topic include:

- Campaign Terminology and Structure
- Dialing Modes and IVR Modes
- Pacing and Optimization
- Time zone Assignment Options

Campaign Structure and Terminology

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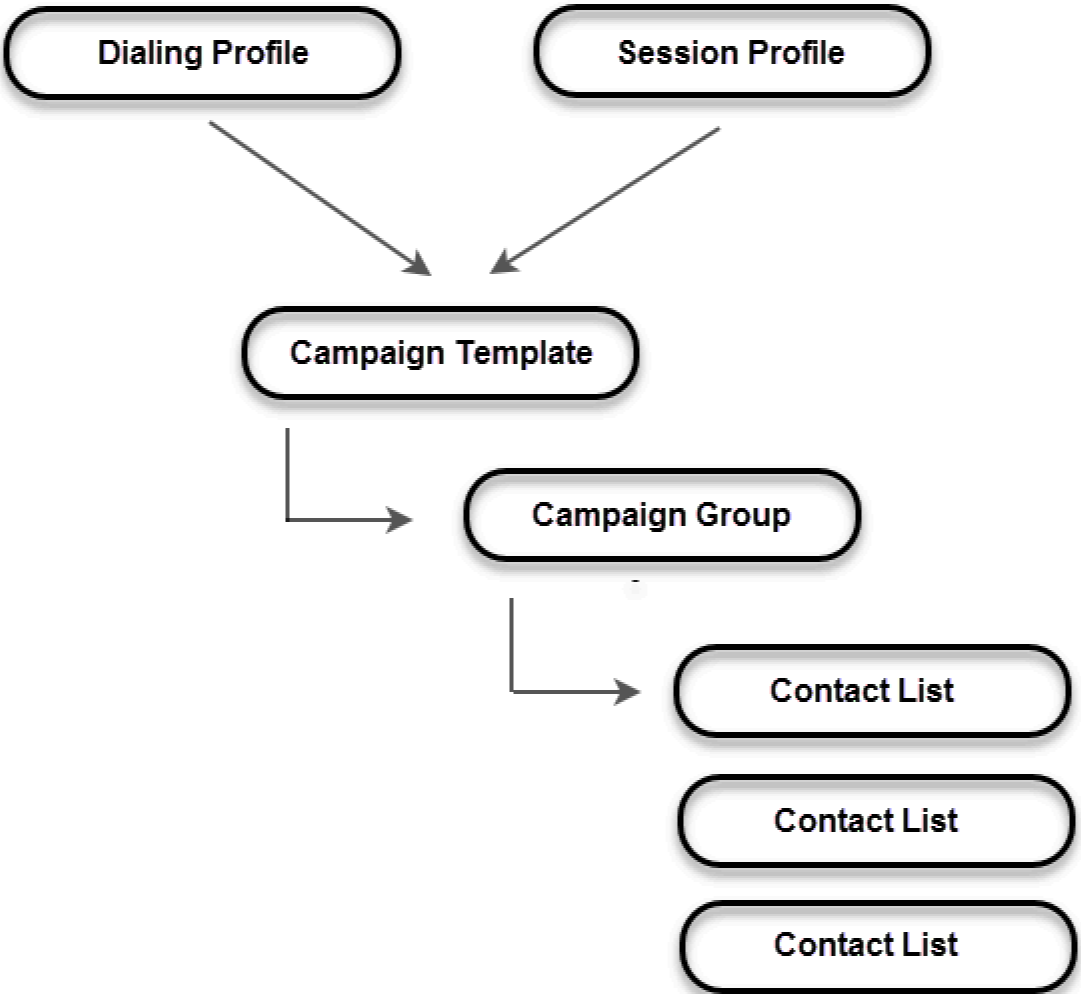
Before you set up a campaign, it's important that you understand the basic structure and terminology associated with an outbound campaign.

This page explains key components of a campaign and describes how those components work together.



The components are as follows:

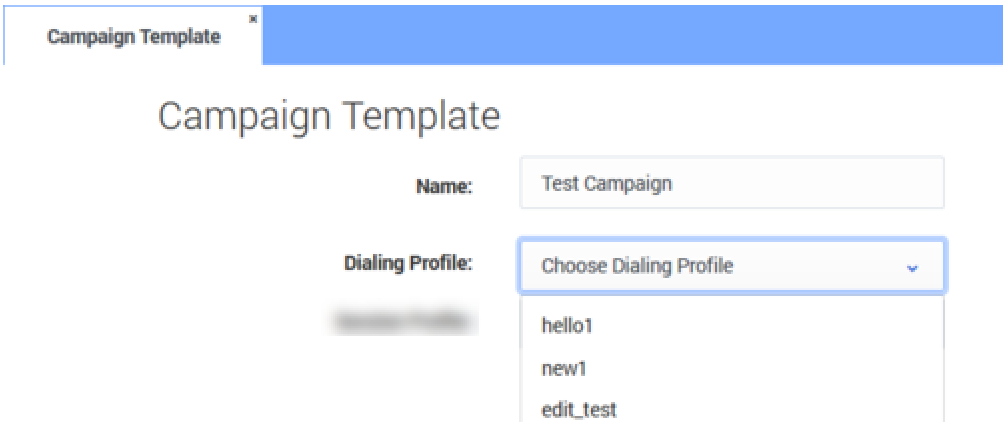
- Dialing profile
- Session profile
- Campaign template
- Campaign group
- Contact list

Dialing Profile

At the top level is the dialing profile. You create the dialing profile in CX Contact and specify dialing-specific and campaign-specific information, such as:

- Dialing Modes and IVR Modes
- Pacing and optimization parameters
- Filtering options
- Treatments

You can have multiple dialing profiles and designate one as the default. All settings from the dialing profile populate when you create a new campaign template.

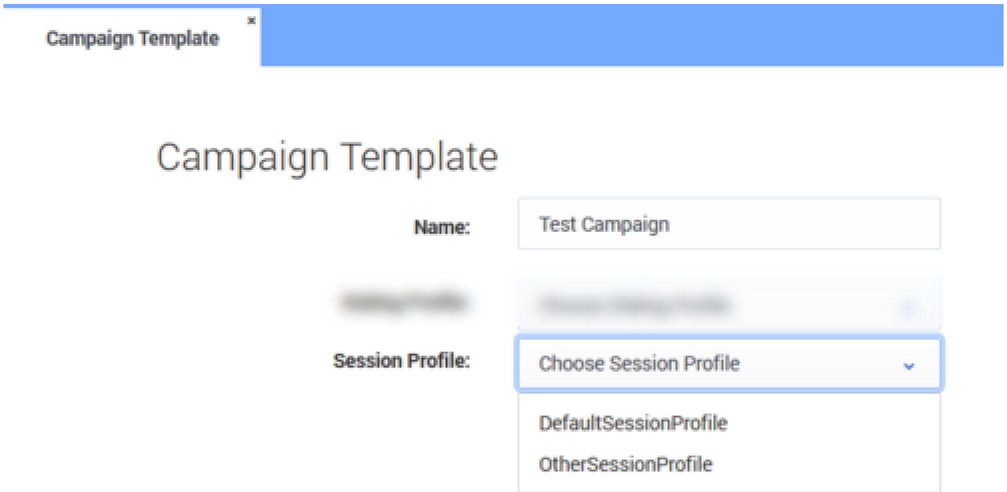


Session Profile

Also at the top level is the session profile. The session profile consists of objects, which are created in Genesys Administrator EXtension (GAX), that store system-level parameters, such as:

- Application object
  - connection to servers
- DN objects
  - trunk groups
  - routing points
  - queues

You can have multiple session profiles and designate one as the default. The session profiles associated with your account populate when you create a new campaign template.



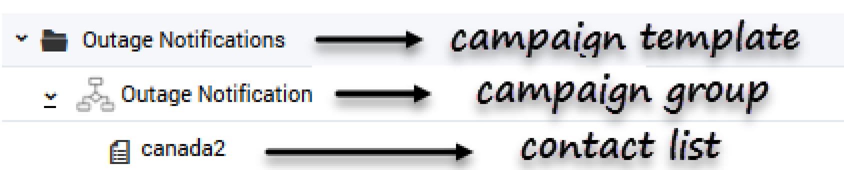
Important

Session profiles can be created in the Settings tab. For additional information refer to: Settings > Session Profiles.

Campaign Hierarchy

The remaining campaign components are organized according to a standard hierarchical structure on the campaigns dashboard, as follows:

- The campaign template is the top-level folder, meaning that it needs to be created before the other campaign components can be created. It stores the dialing profile and session profile parameters.
  - The campaign group is under the campaign template in the hierarchy. It inherits all campaign template settings and configuration, and it contains one or more contact lists.
    - The contact lists belong to the campaign group. All settings and configuration stored in the campaign group are applied to each record in each contact list



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Campaign Template

The campaign template is the top-level folder that can contain the campaign group/s and contact list/s.

When you create a new campaign template, the dialing profile and session profile you created earlier will populate. When you select the dialing profile, all the parameters you specified on the Dialing Profile page appear. You can edit any or all of those settings for this particular template.

Campaign Group

The campaign group is created from the campaign template and inherits all the settings from the campaign template (but you can edit any or all of them when you create the campaign group). The campaign group must always contain an agent group and at least one contact list.

Contact List

When you create a new campaign group, you select one or more contact lists. Each record in the contact list inherits the rules and treatments specified for that campaign group.

Each contact list appears on a separate line on the campaigns dashboard, right under the associated campaign group because campaign statistics are displayed for each contact list.

Record

A record is a row in a Contact List table. In addition to mandatory fields, each record contains:

- A phone number.
- The fields that determine how the records should be processed (Record Type and Record Status).
- The fields that store time boundaries and time zone information; these enable runtime determination of whether the record can be dialed.

Chain

A chain is the set of records for the same customer in a Contact List. These records typically contain alternative phone numbers such as home, business, and cellular phone.

Call Results

The final outcome of a call is stored in the Contact List from which the call is dialed. For additional information, refer to Call Result Types.

Record Types

Record types indicate if a record should be dialed, not dialed, or scheduled. For additional information, refer to Record Types.

Record Statuses

A record status displays the latest record status. For additional information, refer to Record Statuses.

Related Topics

- Campaigns Dashboard
- Create a Dialing Profile
- Create a Campaign Template
- Create a Campaign Group
- Create and Manage Contact Lists

CX Contact Channels

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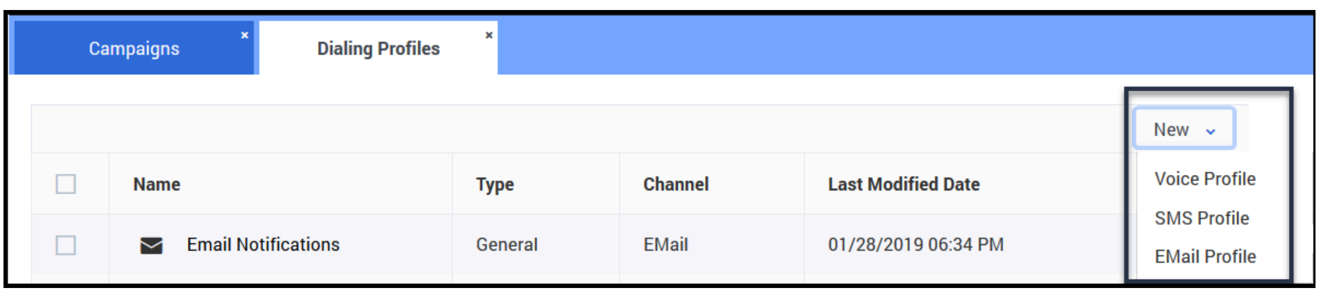
With CX Contact, you can communicate with customers via one of three channels:

- Voice - Dialing campaigns that include advanced dialing capabilities.
- SMS - One-way SMS text message campaigns.
- Email - Personalized and dynamic email messaging campaigns.

Enable a Channel



You select the channel for a campaign when you create a new dialing profile:

1. On the **Dialing Profiles** page, click **New**.
2. Select either **Voice Profile**, **SMS Profile**, or **Email Profile** from the corresponding menu.

Create SMS and Email Templates

- To learn how to create an SMS template and message content, go to the Create an SMS Template page.
- To learn how to create an email template and message content, go to the Create an Email Template page.

Dialing Modes and IVR Modes

Important

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When you configure a campaign, you'll need to choose a dialing mode or an IVR mode that best suits your campaign. Your choice will depend on the type of campaign you're running, the number of agents, if any, assigned to the campaign, and compliance regulations. This article describes the available dialing modes and IVR modes.

Dialing Modes

The tables below provide a summary of each dialing mode and lists the available pacing options and optimization parameters for each. If a field is blank, it means those options do not apply for that dialing mode.

Dialing Modes for the Voice Channel

There are two types of dialing modes for the voice channel: automatic and manual.

For automatic dialing modes, a dialer automatically dials phone numbers and then bridges the answered calls to agents. The system refers to an advanced algorithm and pacing calculations to determine such things as the number of calls it should make and the rate at which those calls should be made.

In manual dialing, agents dial customers or contacts manually.

Dialing Mode	Description	Pacing Options	Optimization Parameters
Predictive (Automatic)	• The fastest dialing mode. • The dialer uses an algorithm to predict agent availability and call results so that it can safely dial multiple phone	• Small Group mode • Ignore very long calls • Average	• Agent Busy Factor • Abandoned Call Rate • Average Agent

Dialing Mode	Description	Pacing Options	Optimization Parameters
	numbers for each available agent. • The constant rate of dialing results in reduced agent idle time. • To minimize the risk of call abandonment, use Predictive only in high-volume campaigns with at least 15 agents.	inbound/ outbound call duration • Inbound rate calls per hour	Wait Time
Predictive with Seizing (Automatic)	• The system reserves agents before making calls. The agents are 'predicted' to be ready to take the call when the call is connected. • Use in high-volume campaigns with at least 15 agents in a group.	• Small Group mode • Ignore very long calls • Average inbound/ outbound call duration • Inbound rate calls per hour	• Agent Busy Factor • Abandoned Call Rate • Average Agent Wait Time
Progressive (Automatic)	• The dialer places only one call for every one available agent. This guarantees that there's an available agent for every contact who answers a call, so there's no risk of exceeding the abandoned call rate. • Use in low-volume, high-value campaigns with fewer than 15 agents in the group.	• Lines per agent • Reserve agents for inbound calls	
Progressive with Seizing (Automatic)	• The system reserves agents in advance of making calls. Unlike the Predictive with Seizing dialing mode, which *expects* agents to be on the line when a call is answered, in Progressive with Seizing, agents are	• Lines per agent • Reserve agents for inbound calls	

Dialing Mode	Description	Pacing Options	Optimization Parameters
	already reserved and waiting to take the call. • Use in low-volume, high-value campaigns with fewer than 15 agents in the group.		
Pull Preview (Manual)	• An agent requests (pulls) records from the system, previews the record, and then decides whether to dial the call. • Use in high-value campaigns, where individual ownership of accounts is the highest priority.		
Push Preview (Manual)	• The system pushes records to an agent. The agent previews the record and then decides whether to dial the call. • Use in high-value campaigns, where individual ownership of accounts is the highest priority.		

Dialing Modes for the SMS and Email Channels

The table below lists the dialing modes available for SMS and Email channels.

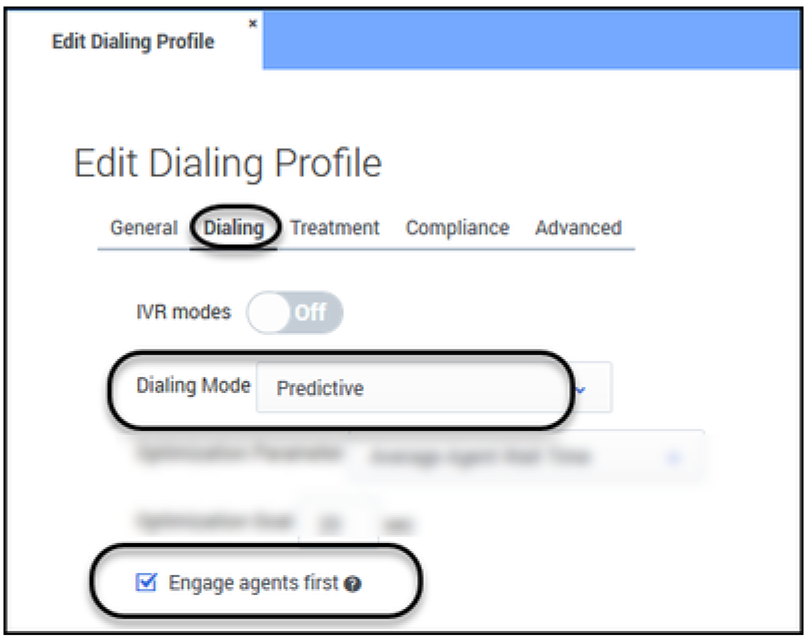
Dialing Mode	Description	Pacing Options
Rate per Minute (default)	With this dialing mode, you can use the **SMS per Minute** or **Email per Minute** pacing option to define a precise number of text or email messages sent per minute.	SMS per Minute/ Email per Minute
Auto Pacing	With Auto Pacing, the pace at which text or email messages are sent is automatically set and adjusted in order to spread delivery out as evenly as possible throughout the delivery window.	

Dialing Mode	Description	Pacing Options
Broadcast	Use this dialing mode when you want to broadcast as quickly as possible to all contacts in the contact list.	

Enabling Dialing Modes

Any dialing mode can be enabled at the Dialing Profile, Campaign Template, or Campaign Group level:

1. Click the **Dialing** tab.
2. From the **Dialing Mode** menu, select the dialing mode you want to enable.
3. If applicable, select the pacing options or optimization parameters that will dictate the pacing for this campaign.
4. If you are using either Predictive with Seizing or Progressive with Seizing, check the **Engage agents first** option.



Dialing Modes and Target Abandon Rate

If you have a campaign using Predictive dialing and the **Abandoned Call Rate** optimization parameter, the system can switch to Progressive dialing in the event the target abandon rate reaches your optimization goal (for example 3.1%) to eliminate the risk of further abandonment. The system can then switch back to Predictive once the call abandon rate returns to an acceptable level (for example 2.9%).

To enable this functionality, go to the **Compliance** tab for the campaign object and set the conditions in which the system should switch to Progressive, and then set the conditions in which it should return to Predictive.

Important

If the campaign group is currently running, the following restrictions are in place:

- You cannot switch from Predictive to Pull Preview or Push Preview.
- You cannot switch from Progressive to Pull Preview or Push Preview.
- You cannot change the Engage agents first option for either the Progressive (with Seizing) or the Predictive (with Seizing) dialing mode.

To change any of these settings, you need to stop the campaign group, edit the settings, and then resume the campaign group.

LIFO Mode

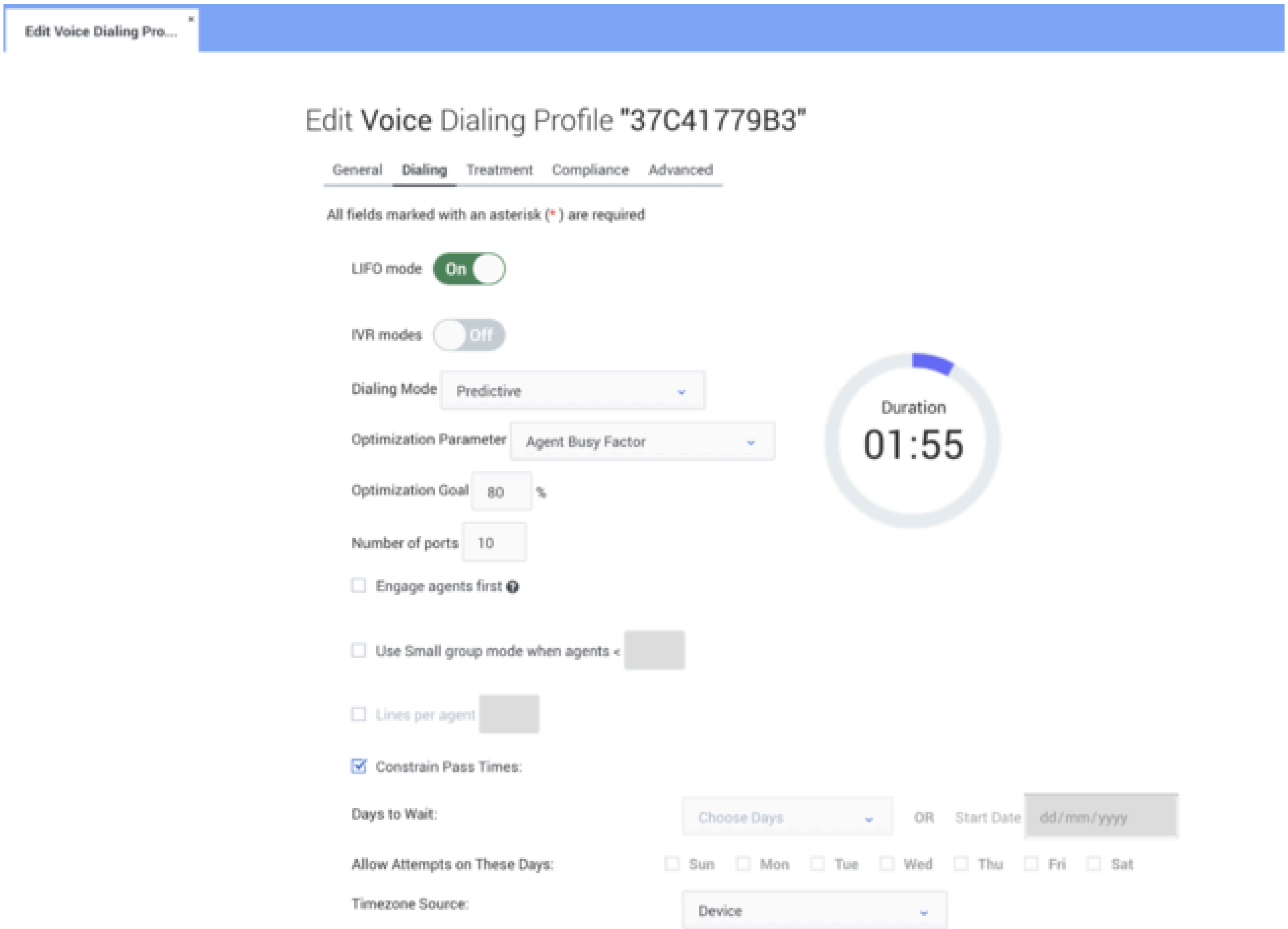
When creating/editing a Voice Profile, you can optionally enable LIFO (Last In First Out behavior) on the current dialing mode to support record insertion directly into the dialing buffer, as opposed to the calling list. Record insertion is only supported through the API. You may want to enable LIFO when you have time-sensitive contacts to dial. For example, a request for a contact (a sales lead) is initiated via a website visit. LIFO behavior works by prioritizing the most recent request for a contact (a record) by putting this request at the very top of the dialing buffer so that it is the next record accessed. This also includes being prioritized over other LIFO records that have not yet been attempted and are still in the dialing buffer.

Enabling LIFO

To enable LIFO behavior, turn on the LIFO mode switch in the **Voice Profile > Dialing** tab. You can enable LIFO behavior in any Voice Dialing mode.

Important

When LIFO behavior is enabled, standard treatment escalation is disabled. LIFO behavior only supports a single record dialed per contact.



IVR Modes

Use an IVR mode when you want to send personalized and/or interactive messages to your contacts.

Use Cases	• A retailer wants to solicit feedback from customers via an interactive survey. The customer answers a series of questions via a touchtone keypad (for example, *Press 1 for Yes* or *Press 2 for No*). The call ends when the contact completes the survey. • A bank sends out a late payment reminder to its customers. Customers can press 0 to make payment arrangements with a customer service representative.

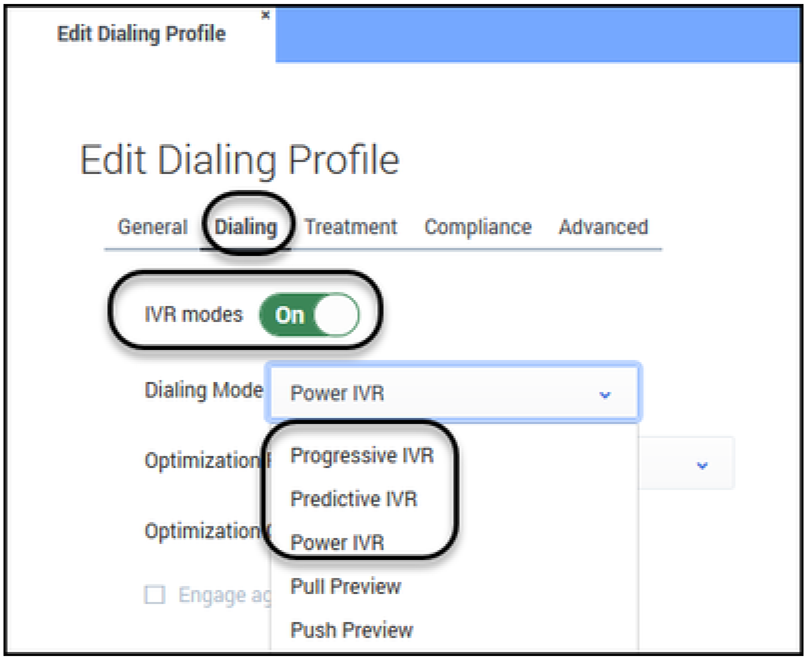
The table below provides a summary of each IVR mode and lists the available pacing options and optimization parameters for each. If a field is blank, it means those options do not apply for that IVR mode.

IVR Mode	Description	Pacing Options	Optimization Parameters
Predictive IVR	Calls can be connected to an agent. For example, *Press 0 to speak to a customer service representative.* The system bases pacing calculations on defined optimization parameters and pacing settings, just as it does when a campaign is running in the Predictive dialing mode.		• Agent Busy Factor • Abandoned Call Rate • Average Agent Wait Time • Average Distribution Time
Progressive IVR	Calls can be connected to an agent. For example, *Press 0 to speak to a customer service representative.* The system bases pacing calculations on the number of allocated IVR ports defined for that campaign group.	• IVR ports	
Power IVR	Agents are not involved in these campaigns, so contacts are never given the option to speak to one. When the message ends, the call ends. The system bases pacing calculations on the defined number of calls per minute value.	• Calls per minute	

Enabling IVR Modes

You first enable an IVR mode on the **Dialing Profile** page, as follows:

1. Click the **Dialing** tab.
2. Set the **IVR modes** option to **On**. All three IVR modes will now replace the automatic dialing modes in the **Dialing Mode** menu.
3. From the **Dialing Mode** menu, select the IVR mode you want to enable.
4. Select the pacing options or optimization parameters that will dictate the pacing for this campaign.
5. Optional: Specify the number of IVR ports you want to allocate to that campaign group.



Important

If the campaign group is currently running, you cannot change the **IVR modes** option, meaning that if this option is set to **On** while the campaign group is running, it must remain **On**.

Important

You can select a different **IVR mode** or switch to a manual dialing mode (Push Preview or Pull Preview) on the **Campaign Template** and **Campaign Group** page, but you cannot switch to an automatic dialing mode. You must either return to the **Dialing Profile** page and switch to an automatic dialing mode (set the **IVR modes** option to **Off**) or use a different dialing profile for that campaign template.

Related Topics

- Create and Manage a Dialing Profile
- Create and Manage a Campaign Template

- Create and Manage a Campaign Group

Pacing and Optimization

Important

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Warning

Pacing Options are used to control the dialing algorithm, so it's important you understand the implications incurred when changing the pacing.

Pacing and optimization defines the way in which contact attempts are made - you select the parameters that best satisfy your business requirements and the dialing algorithm adjusts accordingly.

This article describes the following:

- Pacing options
- Optimization parameters
- Advanced dialing options

Pacing Options

Pacing Options are enabled on either the Dialing tab or the Advanced tab for the dialing profile, campaign template, or campaign group.

The table below provides a summary of each pacing option, identifies their associated dialing mode and IVR mode, and references the tab used to enable each option.

Parameter	Applicable Dialing Modes	Description	Where to Enable
Lines per agent	• Progressive • Progressive	Use the Lines Per Agent pacing option to adjust the number of outbound calls dialed for each available agent. Pacing is based on the number of outbound calls	Dialing tab

Parameter	Applicable Dialing Modes	Description	Where to Enable
	with Seizing	that are simultaneously in progress and the number of agents in ready status. The system calculates the number of new outbound calls to be dialed as the largest integer (rounded down) that does not exceed the number of available agents multiplied by the value of the progressive multiplier. **Example:** • The progressive multiplier is 0.7 • The number of ready agents is 4 • The number of queued calls is 0 • The number of dialed calls is 1 The system calculates the number of new calls: `1 = [0.7 * (4 – 0 – {1/0.7}] = [0.7 * (4 – 2)] = 1.4 (rounded down) = 1`	
Small group mode	• Predictive • Predictive with Seizing	When small group mode is enabled, the dialer uses an advanced algorithm that takes into account all inbound calls that are at all stages of processing, not just those being queued. This allows the dialer to initiate outbound calls, even if one or more calls remain in the dialing stage. Because the dialer doesn't wait until all dialed calls are completed before dialing a new batch of records, agent idle time is reduced.	Dialing tab
Calls per minute	• Power IVR	Use the Calls per Minute pacing option to specify the number of concurrent calls the system can make per minute.	Dialing tab (First enable the IVR modes option and select Power IVR.)
Number of ports	• Progressive • Predictive • Progressive IVR	Important Number of ports is available as a pacing option for Progressive IVR mode only, but it can be used to control campaign group capacity	Dialing tab

Parameter	Applicable Dialing Modes	Description	Where to Enable
	(pacing and capacity control) • Predictive IVR (capacity control) • Power IVR (capacity control)	for any of the three IVR modes. Use this option to allocate a set number of ports to the campaign group. This allows you to define the maximum capacity (number of concurrent calls) for that specific dialing event. The distinctions between each IVR mode are as follows: • Predictive IVR - In Predictive IVR, where pacing is driven by the agent optimization parameter, the number of IVR ports assigned caps the maximum number of concurrent calls. • Progressive IVR - The allocated number of IVR ports acts as both the maximum capacity and the pacing mode, where the pacing algorithm looks to fully utilize the maximum number of ports (concurrent calls) at all times. • Power IVR - Pacing is set by the number of calls per minute; however, the calls-per-minute rate is capped by the number of IVR ports assigned.	
Average inbound call duration	• Predictive • Predictive with Seizing	Specify the average call duration for inbound calls and the system will refer to this value when calculating the average call duration.	Advanced tab
Average outbound call duration	• Predictive • Predictive with Seizing	Specify the average call duration for outbound calls and the system will refer to this value when calculating the average call duration.	Advanced tab
Inbound rate calls per hour	• Predictive • Predictive with Seizing	Specify the anticipated number of inbound calls per hour. These calls will not be factored into the dialing algorithm.	Advanced tab
Ignore very long calls	• Predictive	Outbound calls that last significantly longer than the average call duration (specified	Advanced tab

Parameter	Applicable Dialing Modes	Description	Where to Enable
	• Predictive with Seizing	above) can increase the average call duration, which negatively affects dialing efficiency. Select this option to omit these calls from average call duration calculations.	
Reserve agents for inbound	• Progressive • Progressive with Seizing	Select this option to reserve a specified number of agents in a campaign group using Progressive dialing for inbound traffic only. To the dialer, these agents will be in an unavailable status (for example Busy), so those agents will not be factored into the algorithm.	Advanced tab
SMS per minute/Email per minute (available for the SMS and Email channels only)	• Rate per Minute	Select this option to define a precise number of text or email messages sent per minute.	Dialing tab

Optimization Parameters

When you use an optimization parameter, the system adjusts call pacing to adhere to that parameter. For example, if you select the Abandoned Call Rate as the optimization parameter with a goal of 3%, the system adjusts the number of calls dialed to achieve the 3% goal. Call pacing may increase and decrease as the target rate fluctuates.

The table below describes each optimization parameter and lists the dialing mode and/or IVR mode to which it applies. Note: All optimization parameters are set on the Dialing tab for the dialing profile, campaign template, or campaign group.

Parameter	Applicable Dialing Modes	Description
Agent Busy Factor	• Predictive • Predictive with Seizing • Predictive IVR	The percentage of the agent's logged in time that they are occupied on calls.
Abandoned Call Rate	• Predictive • Predictive with	The percentage of dropped or abandoned calls - the result of the system dialing more calls than there are available agents. Important: Your optimization goal should not exceed the allowable abandoned call rate set out by legislative bodies

Parameter	Applicable Dialing Modes	Description
	Seizing • Predictive IVR	such as FTC and OFCOM.
Average Agent Wait Time	• Predictive • Predictive with Seizing • Predictive IVR	The time, in seconds, that each agent waits between calls.
Average Distribution Time	• Predictive IVR	The time, in seconds, that a call waits in the queue until there is an agent available to take the call. The number of calls, including abandoned, are calculated in the pacing algorithm.

Advanced Dialing Options

The following dialing options are set on the Advanced tab for the dialing profile, campaign template, or campaign group.

Option	Applicable Dialing Modes	Description
Answer type recognition	• All dialing modes	Defines the type of Call Progress Detection (CPD) analysis that is applied to outbound calls when dialing using SIP Server. For details refer to the call_answer_type_recognition OCS option description in the **OCS Option Descriptions** page.
Timeguard timeout	• Predictive IVR • Progressive IVR • Power IVR	Set a timeout, in milliseconds, for post-connect CPD. The call is transferred to a queue when the timeout expires, regardless of the call results or the completion of CPD.
Dialing Buffers	• All dialing modes	A dialing buffer acts as a multiplier for the number of agents that are available for a campaign. Together, the Minimum and Optimum values determine how many records the system keeps in memory. • **Minimal buffer size** - Enter the minimum number of contact list records per active agent that the system keeps on hand for dialing. The default is 4. • **Optimal buffer size** - Enter the optimal number of contact list records per active agent that the system keeps on hand for dialing. The default is 6.
Call Wait Connected Timeout	• Available for all dailing modes.	Specifies the timeout of the call. That is, the time at which the dialer should consider that the call is not answered by call party.

Related Topics

- Dialing Modes and IVR Modes
- Compliance Tools

Timezone Assignment

> **Important**
>
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> For the latest content and most recent updates, see the CX Contact Help on the Genesys Multicloud site.

System-level assignment of timezones based on device and/or postal code is sourced from third-party providers and maintained within the compliance component of CX Contact. This is an inclusive feature of CX Contact.

This article explains the ways in which CX Contact assigns a timezone to a record within a contact list.

Timezone Assignment Options

The record's Timezone is independently detected by the Contact level and Device level as described below.

> **Important**
>
> If you upload a non-geo number (+1 800) without providing a contact timezone for that record and the CX Contact account doesn’t contain a custom timezone entry for +1 800, then CX Contact will refer to the Default timezone field specified on the General tab of the Settings page.

Contact Level

The user-defined field used at the Contact level depends on the type of mapping used, as described below:

- Mapping via explicit assignment - The value in the user-defined value explicitly states the timezone to be used (for example, Europe/London).
    - User-defined field can be tz, time_zone, or timezone.
- Mapping via country code and postal code - The value in these user-defined fields stores the postal code

and country code.

- User-defined fields are c_postal_code and c_country_code_iso.

Device Level

The user-defined field used at the Device level depends on the type of mapping used, as described below:

- Mapping via Custom map - See the Custom Timezone Mapping section below for more information.
- Mapping via Country code and Area code - Timezone is selected based on device's country code and area code.

Important
A user-defined field is a custom field within a contact list used to define or determine a contact's timezone. The custom timezone fields are described above.

Custom Timezone Mapping

Use the custom mapping option as an alternative to adding a user-defined field to a contact list. In the custom map, you assign a timezone to all phone numbers containing a specific country code and area code. For example, you can assign the EST timezone to all national rate phone numbers.

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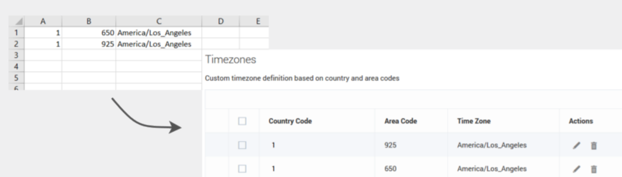
Option 1: On the Custom Timezones tab, click New and then specify the country code, area code, and timezone that should be applied.
Option 2: On the Custom Timezones tab, click From file to import a CSV file containing a list of timezones that should be applied. This file does not require any headings, and once the file is imported into CX Contact, each record from the file will appear as a separate entry in the list of custom timezones, as follows:



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Related Topics

- Compliance Tools - Custom Timezones
- Create and Manage a Dialing Profile
- Define a Safe Dialing Window
- Create and Manage Contact Lists
- Import Specification Files

Role-Based Access Control

Important

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Users logging into the CX Contact UI should have a set of Configuration Server permissions and a set of CX Contact privileges. Both sets are typically assigned using Access Groups.

CX Contact defines several pre-created Access Groups, each associated with a related CX Contact Role.

The following 5 roles are assigned to one or more access groups and each role is assigned one or more privilege (see the tables below). You can also create your own Access Groups and/or your own CX Contact Roles.

Important

User logging into CX Contact UI must have at least a "read" Configuration Server permission for the user logging in.

CX Contact Roles

CX Contact Role Name	Assigned to Access Group(s)
CXContact Administrators	• CXContact Administrators • Super Administrators • Administrators • Provisioning • MACD Administrators • <Tenant name> Administrators
CXContact Analytics	• CXContact Analytics

CX Contact Role Name	Assigned to Access Group(s)
CXContact Data	• CXContact Data
CXContact Supervisors	• CXContact Supervisors • <Tenant name> Supervisors
CXContact Users	• CXContact Users • Read Only

Detailed Privileges per Role

- ✓ - Allowed (option is present with value "1" in the Annex of the Role object)
- ✗ - Denied (options is not present in the Annex of the Role object)

Privilege	Comment	CX Contact Administrator	CX Contact Supervisors	CX Contact Users	CX Contact Analytics	CX Contact Data
CXContact.SessionProfiles.canCreate		✓	✗	✗	✗	✗
CXContact.SessionProfiles.canRead		✓	✓	✗	✗	✗
CXContact.SessionProfiles.canUpdate		✓	✗	✗	✗	✗
CXContact.SessionProfiles.canDelete		✓	✗	✗	✗	✗
CXContact.DialingProfiles.canCreate		✓	✓	✗	✗	✗
CXContact.DialingProfiles.canRead		✓	✓	✓	✗	✗
CXContact.DialingProfiles.canUpdate		✓	✓	✗	✗	✗
CXContact.DialingProfiles.canDelete		✓	✓	✗	✗	✗
CXContact.CampaignTemplates.canCreate		✓	✓	✗	✗	✗
CXContact.CampaignTemplates.canRead		✓	✓	✓	✗	✗
CXContact.CampaignTemplates.canUpdate		✓	✓	✗	✗	✗
CXContact.CampaignTemplates.canDelete		✓	✓	✗	✗	✗
CXContact.CampaignGroups.canCreate		✓	✓	✗	✗	✗
CXContact.CampaignGroups.canRead		✓	✓	✓	✗	✗
CXContact.CampaignGroups.canUpdate		✓	✓	✗	✗	✗
CXContact.CampaignGroups.canDelete		✓	✓	✗	✗	✗
CXContact.CampaignGroups.canExecute	Start/Stop/Pause	✓	✓	✗	✗	✗

Privilege	Comment	CX Contact Administrators	CX Contact Supervisors	CX Contact Users	CX Contact Analytics	CX Contact Data
CXContact.ContactLists.canCreate		✓	✓	✗	✗	✓
CXContact.ContactLists.canRead		✓	✓	✓	✗	✓
CXContact.ContactLists.canUpdate	Includes INSERT, UPDATE, DELETE to List DB Table	✓	✓	✗	✗	✓
CXContact.ContactLists.canDelete		✓	✓	✗	✗	✓
CXContact.ContactLists.Search.canExecute	Search for entries in the Contact list.	✓	✓	✗	✗	✓
CXContact.SuppressionLists.canCreate		✓	✓	✗	✗	✓
CXContact.SuppressionLists.canRead		✓	✓	✓	✗	✓
CXContact.SuppressionLists.canUpdate	Includes INSERT, UPDATE, DELETE to List DB Table	✓	✓	✗	✗	✓
CXContact.SuppressionLists.canDelete		✓	✗	✗	✗	✓
CXContact.SuppressionLists.Search.canExecute	Search for entries in the Suppression list.	✓	✓	✗	✗	✓
CXContact.SelectionRules.canCreate		✓	✓	✗	✗	✓
CXContact.SelectionRules.canRead		✓	✓	✓	✗	✓
CXContact.SelectionRules.canUpdate		✓	✓	✗	✗	✓
CXContact.SelectionRules.canDelete		✓	✓	✗	✗	✓
CXContact.UploadRules.canCreate		✓	✓	✗	✗	✓
CXContact.UploadRules.canRead		✓	✓	✓	✗	✓
CXContact.UploadRules.canUpdate		✓	✓	✗	✗	✓
CXContact.UploadRules.canDelete		✓	✓	✗	✗	✓
CXContact.FilteringRules.canCreate		✓	✓	✗	✗	✓
CXContact.FilteringRules.canRead		✓	✓	✓	✗	✓
CXContact.FilteringRules.canUpdate		✓	✓	✗	✗	✓
CXContact.FilteringRules.canDelete		✓	✓	✗	✗	✓

Privilege	Comment	CX Contact Administrators	CX Contact Supervisors	CX Contact Users	CX Contact Analytics	CX Contact Data
CXContact.AutomationJobs.canCreate		✓	✓	✗	✗	✓
CXContact.AutomationJobs.canRead		✓	✓	✓	✗	✓
CXContact.AutomationJobs.canUpdate		✓	✓	✗	✗	✓
CXContact.AutomationJobs.canDelete		✓	✗	✗	✗	✓
CXContact.AutomationJobs.canExecute	Manual execution via **Run now**.	✓	✓	✗	✗	✓
CXContact.SpecificationFiles.canCreate		✓	✓	✗	✗	✓
CXContact.SpecificationFiles.canRead		✓	✓	✓	✗	✓
CXContact.SpecificationFiles.canUpdate		✓	✓	✗	✗	✓
CXContact.SpecificationFiles.canDelete		✓	✗	✗	✗	✓
CXContact.DataMappings.canCreate		✓	✓	✗	✗	✓
CXContact.DataMappings.canRead		✓	✓	✓	✗	✓
CXContact.DataMappings.canUpdate		✓	✓	✗	✗	✓
CXContact.DataMappings.canDelete		✓	✗	✗	✗	✓
CXContact.Labels.canCreate		✓	✓	✗	✗	✓
CXContact.Labels.canRead		✓	✓	✓	✗	✓
CXContact.Labels.canUpdate		✓	✓	✗	✗	✓
CXContact.Labels.canDelete		✓	✗	✗	✗	✓
CXContact.Compliance.AttemptRules.canCreate		✓	✓	✗	✗	✗
CXContact.Compliance.AttemptRules.canRead		✓	✓	✓	✗	✗
CXContact.Compliance.AttemptRules.canUpdate		✓	✓	✗	✗	✗
CXContact.Compliance.AttemptRules.canDelete		✓	✗	✗	✗	✗
CXContact.Compliance.CustomTZMap.canCreate		✓	✓	✗	✗	✗
CXContact.Compliance.CustomTZMap.canRead		✓	✓	✓	✗	✗
CXContact.Compliance.CustomTZMap.canUpdate		✓	✓	✗	✗	✗
CXContact.Compliance.CustomTZMap.canDelete		✓	✗	✗	✗	✗
CXContact.Compliance.LocationRules.canCreate		✓	✓	✗	✗	✗
CXContact.Compliance.LocationRules.canRead		✓	✓	✓	✗	✗
CXContact.Compliance.LocationRules.canUpdate		✓	✓	✗	✗	✗

Privilege	Comment	CX Contact Administrators	CX Contact Supervisors	CX Contact Users	CX Contact Analytics	CX Contact Data
CXContact.Compliance.LocationRules.canDelete		✓	✗	✗	✗	✗
CXContact.Compliance.ContactTimes.canCreate		✓	✓	✗	✗	✗
CXContact.Compliance.ContactTimes.canRead		✓	✓	✓	✗	✗
CXContact.Compliance.ContactTimes.canUpdate		✓	✓	✗	✗	✗
CXContact.Compliance.ContactTimes.canDelete		✓	✗	✗	✗	✗
CXContact.Compliance.ContactDates.canCreate		✓	✓	✗	✗	✗
CXContact.Compliance.ContactDates.canRead		✓	✓	✓	✗	✗
CXContact.Compliance.ContactDates.canUpdate		✓	✓	✗	✗	✗
CXContact.Compliance.ContactDates.canDelete		✓	✗	✗	✗	✗
CXContact.Compliance.CustomRules.canCreate		✓	✓	✗	✗	✗
CXContact.Compliance.CustomRules.canRead		✓	✓	✓	✗	✗
CXContact.Compliance.CustomRules.canUpdate		✓	✓	✗	✗	✗
CXContact.Compliance.CustomRules.canDelete		✓	✗	✗	✗	✗
CXContact.Analytics.canCreate		✓	✓	✗	✓	✗
CXContact.Analytics.canRead		✓	✓	✓	✓	✗
CXContact.Analytics.canUpdate		✓	✓	✗	✓	✗
CXContact.Analytics.canDelete		✓	✗	✗	✓	✗
CXContact.Settings.canCreate		✓	✓	✗	✗	✗
CXContact.Settings.canRead		✓	✓	✓	✗	✗
CXContact.Settings.canUpdate		✓	✓	✗	✗	✗
CXContact.Settings.canDelete		✓	✗	✗	✗	✗
CXContact.Schedules.canCreate		✓	✓	✗	✗	✗
CXContact.Schedules.canRead		✓	✓	✓	✗	✗
CXContact.Schedules.canUpdate		✓	✓	✗	✗	✗
CXContact.Schedules.canDelete		✓	✗	✗	✗	✗
CXContact.Schedules.canExecute	Reserved for future use.	✓	✓	✗	✗	✗
CXContact.CallerIDSets.canRead		✓	✓	✗	✗	✗
CXContact.CallerIDSets.canUpdate		✓	✓	✓	✗	✗
CXContact.CallerIDSets.canDelete		✓	✓	✗	✗	✗

Privilege	Comment	CX Contact Administrators	CX Contact Supervisors	CX Contact Users	CX Contact Analytics	CX Contact Data
CXContact.CallerIDSets.canExecute		✓	✗	✗	✗	✗

Campaigns

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 this section of the user interface to create and manage campaigns.

Link to video

What do you want to do?

- Create a dialing profile
- Create a campaign template
- Create a campaign group
- Create an SMS template
- Create an Email template
- Understand key campaign metrics displayed on the campaigns dashboard
- Define the calling window (time constraints)
- Apply call treatments

View Campaign Statistics

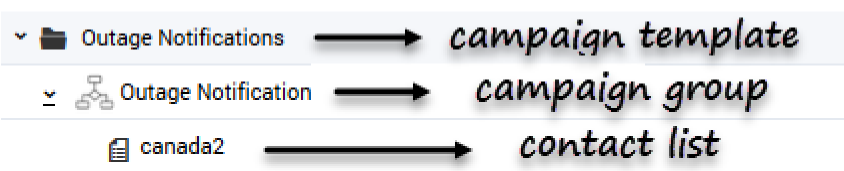
Important
The content of this document has been moved and is no longer being updated in this location.
For the latest content and most recent updates, see the CX Contact Help on the Genesys Multicloud site.

When you launch CX Contact, you land on the **Campaigns** page. This is where you'll monitor the status of running campaigns in real-time.

This article describes the fields and metrics displayed on the campaigns dashboard. To learn how to create and manage a campaign template, refer to the Create and Manage a Campaign Template page. To learn how to create and manage a campaign group, refer to the Create and Manage a Campaign Group page.

Dashboard Basics

The first column in the campaigns dashboard is the **Campaigns/Groups** column. It lists all the campaign templates, campaign groups, and contact lists that have been created in CX Contact.



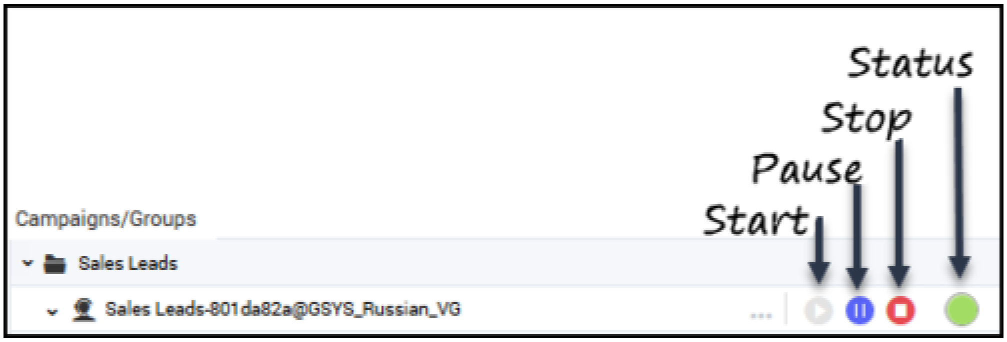
Media Controls

Use the media controls next to each campaign group to start, pause, or stop dialing activity.

- Start - Starts or resumes dialing.
- Pause - Pauses dialing activity.
- Stop - Stops (unloads) dialing entirely. **Note**: Stopping a campaign group resets all campaign group statistics.

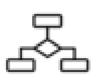
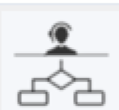
A status bulb next to the media controls indicates the current status of the campaign group and uses the following color scheme:

- Green - Active/Running
- Blue - Paused
- Grey - Inactive

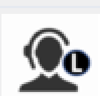
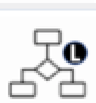
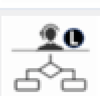


Campaign Group Icons

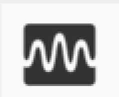
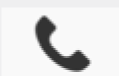
Campaign templates are always represented by a folder icon, and contact lists are represented by a document icon. An icon to the left of a campaign group name identifies the type of dialing or IVR mode(s) being used. The table below describes the three types of icons.

Icon	Dialing Mode	Type of Dialing Profile
	Predictive, Progressive (with or without Seizing) or Push or Pull Preview	Agent
	Power IVR	IVR
	Predictive IVR or Progressive IVR	Agent

To visually inform you that LIFO has been enabled within an existing dialing mode the dialing icons will appear as shown in the following table.

Icon	LIFO Mode	Type of Dialing Profile
	Predictive, Progressive (with or without Seizing) or Push or Pull Preview with LIFO	Agent / LIFO
	Power IVR with LIFO.	IVR / LIFO
	Predictive IVR or Progressive IVR with LIFO	Agent / LIFO

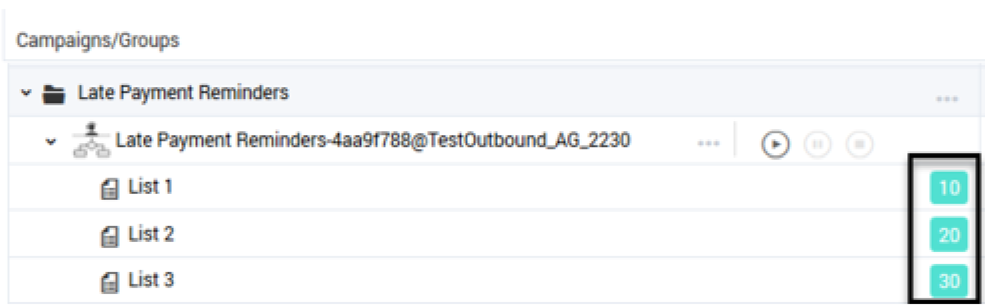
To the right of a campaign group name, an icon identifies the dialing mode the campaign group uses. Hover over that icon to see the name of the dialing mode and a list of associated dialing parameters. The table below describes the dialing mode associated with each icon and the dialing parameters that display onscreen when you hover over the icon.

Icon	Dialing Mode	Dialing Parameters
	Progressive IVR, Predictive IVR, or Power IVR	Dialing mode, number of IVR ports, calls per minute
	Push or Pull Preview	Dialing mode only
	Predictive or Progressive (with or without Seizing)	Dialing mode, optimization parameter, optimization value, and number of ports

For more information about dialing modes and IVR modes, refer to the Dialing Modes and IVR Modes page.

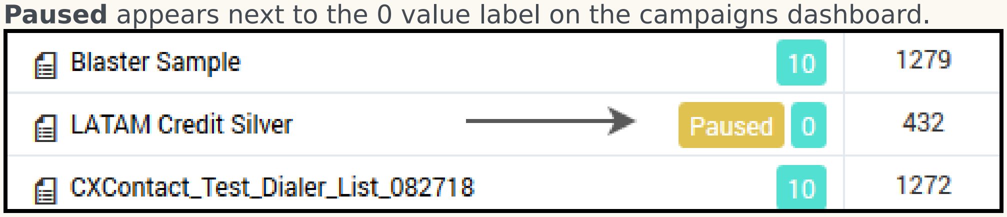
Contact List Weights

If a campaign group has more than one contact list, you can assign a weight to each contact list. The assigned weight label appears on the campaigns dashboard, next to the name of the contact list.



Important

If a contact list weight is set to 0, all dialing for that list is paused, and the label **Paused** appears next to the 0 value label on the campaigns dashboard.



Dashboard Statistics

The campaigns dashboard displays the following metrics:

<table>
<tr>
<td>Lists</td>
<td>

List Size (List Size/Devices) - The number of unique records and the total number of devices included in the contact list.
Filtered (Contacts Filtered/Devices Filtered) - The total number of records and the total number of devices excluded from the contact list during the campaign group pre-loading stage. A record or device can be excluded for any of the following reasons:

It is included in a mandatory or optional suppression list.
It matches defined filtering criteria (phone number filters, for example, the phone number ends with 00 or 000).

Click to see examples

Shows two statistic values Delivered (Completed)

Delivered (Active) - The number of successful contact attempts for the current/active dialing session. The statistic is calculated in the CX Contact Analytics Contact History index and includes entries with successful = true. The statistic value is set at Campaign Group start and reset during the next load/start.
Completed (Total) - The total number of contact with record status Updated. This statistic is calculated in the Contact List Database table.
% - The percentage of successful contact attempts.

Shows two statistic values Active (Total)

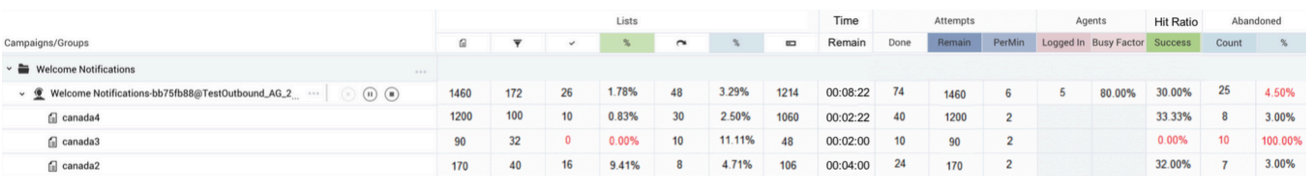
Retrying or Failed (Active) - The number of contacts being retried or with a current failure status for the current/active dialing session. This statistic is calculated in the CX Contact Analytics Contact History index and includes entries with successful = false. The statistic value is set at Campaign Group start and reset during the next load/start.
Retrying or Failed (Total) - The total

</td>
</tr>
</table>

	number of contacts that were not delivered, filtered or have not been attempted. • **%** - The percentage of contacts being retried or with a current failure status. • Not Attempted - The number of contacts remaining to be attempted. This includes contacts with **record_status Ready** and **Retrieved**.
Time	• Remain - The time, in HH:MM:SS, remaining on an active campaign. **Note:** Time Statistics will only generate after at least 1 completed chain, and after 5 minutes of run time.
Attempts	• Done - The total number of contact attempts made. This statistic is calculated in the CX Contact Analytics Call Result Records index and includes entries with **Disposition = Called**. The statistic value is set at Campaign Group start and reset during the next load/start. • Remain - The number of contact attempts that still need to be completed given the Contact List or Campaign Group. Since the number of remaining contact attempts depends on the call results and their ration, and configured treatments, this number is estimated based on the current data. As with any estimation the actual result may vary. The statistic is calculated as follows: 1. Count the number of completed chains (("Lists/Delivered (Total)" + "Lists/Retrying or Failed (Active)") 2. Cont the number of completed dial attempts ("Attempts/Done"). 3. Count the average number of dial attempts per chain (Attempts/Done" / "chains completed already"). 4. Count the remaining chains (("List Size" - "chains completed already" - "records/ chains filtered out during pre-dial validation"). 5. **Attempts/Remain** = "remaining chains" * "average number of dial attempts per chain" • **Per Min** - The number of projected contact attempts per minute.

Agents	• Logged in - The number of agents currently logged in to the agent group. • Busy Factor - The percentage of the agents' logged in time that they are occupied on calls.
Hit Ratio	Hit Ratio is defined as the percentage of queued calls, relative to all dialed calls. • Success - The percentage of successful connections.
Abandoned	• Count- The number of abandoned calls. • % - The percentage of abandoned calls.

Notice in the screenshot below that statistics are displayed for campaign groups and contact lists. If a campaign group contains multiple contact lists, the data is broken down by contact list, with the sum displayed in the **Campaign Group** cell. The only exception here are the **Agents** statistics (**Logged In** and **Busy Factor**). In this case, the cells are left blank - a zero (0) value does not display.



	Lists							Time	Attempts			Agents		Hit Ratio	Abandoned	
Campaigns/Groups				%		%		Remain	Done	Remain	PerMin	Logged In	Busy Factor	Success	Count	%
Welcome Notifications																
Welcome Notifications-bb75fb88@TestOutbound_AG_2...	1460	172	26	1.78%	48	3.29%	1214	00:08:22	74	1460	6	5	80.00%	30.00%	25	4.50%
canada4	1200	100	10	0.83%	30	2.50%	1060	00:02:22	40	1200	2			33.33%	8	3.00%
canada3	90	32	0	0.00%	10	11.11%	48	00:02:00	10	90	2			0.00%	10	100.00%
canada2	170	40	16	9.41%	8	4.71%	106	00:04:00	24	170	2			32.00%	7	3.00%

Tip

Use Genesys Pulse to generate in-depth reports of agent activity and campaign activity.

Search or Filter Campaign Statistics

The following search and filter functions are available on the **Campaigns** page:

Expand/Collapse'	Click **Expand All** to view all campaign groups associated with each campaign template. Click **Expand All** a second time to view all contact lists associated with each campaign group. Click **Collapse All** to hide all campaign groups and contact lists

	associated with each campaign template.
View	Reserved for future use.
Search box	Enables you to search the campaigns dashboard for any value within a campaign template, campaign group, or contact list.
Find Status	Enables you to filter the list of campaigns by status. Options are as follows: • All Statuses • Active • Running • Paused • Unloading • Inactive

Related Topics

- Campaign Structure and Terminology
- Create and Manage a Dialing Profile
- Create and Manage a Campaign Template
- Create and Manage a Campaign Group
- Create and Manage Contacts and Contact Lists

Create a Dialing Profile

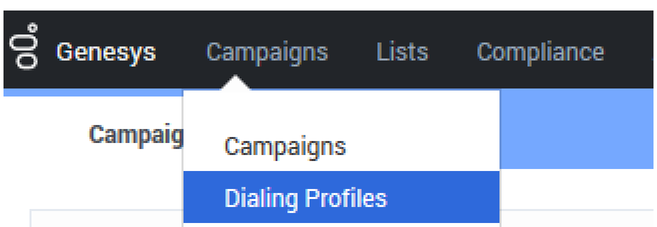
Important

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.

This page describes how to set up a dialing profile. For general information about dialing profiles and how they fit into the overall campaign structure, refer to the Campaign Structure and Terminology page.

Dialing Profile Details

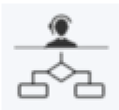
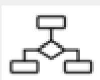
Before you create the new dialing profile, let's take a look at the main **Dialing Profiles** page. To get there, go to the **Campaigns** menu and select **Dialing Profiles**.



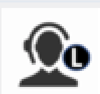
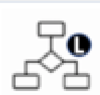
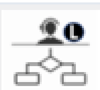
On the main **Dialing Profiles** page, you'll see a table that lists core details about each dialing profile:

- **Name** - Includes the name of the dialing profile and an icon that represents the type of dialing profile being used.
- **Type** - Specifies if the dialing profile is an agent-based dialing profile, or an IVR-based dialing profile. The type also specifies if the dialing profile is a LIFO dialing profile. See the table below for more information.
- **Channel** - Specifies if the dialing profile is applied to a Voice, SMS, or Email channel.
- **Last Modified Date** -The date the dialing profile was last modified.
- **Created Date** - The date the dialing profile was created.

The following table gives a description of each icon and the type of dialing profile it represents.

Icon	Description	Type
	Represents a profile using any automatic or manual dialing mode.	Agent
	Represents a profile using Predictive IVR mode.	Agent
	Represents a profile using either Progressive IVR or Power IVR mode.	IVR
	Represents a dialing profile using an SMS channel.	Alert
	Represents a dialing profile using an Email channel.	General

To visually inform you that LIFO has been enabled within an existing dialing mode the dialing icons will appear as shown in the following table.

Icon	LIFO Mode	Type of Dialing Profile
	Predictive, Progressive (with or without Seizing) or Push or Pull Preview with LIFO.	Agent / LIFO
	Power IVR with LIFO.	IVR / LIFO
	Predictive IVR or Progressive IVR with LIFO.	Agent / LIFO

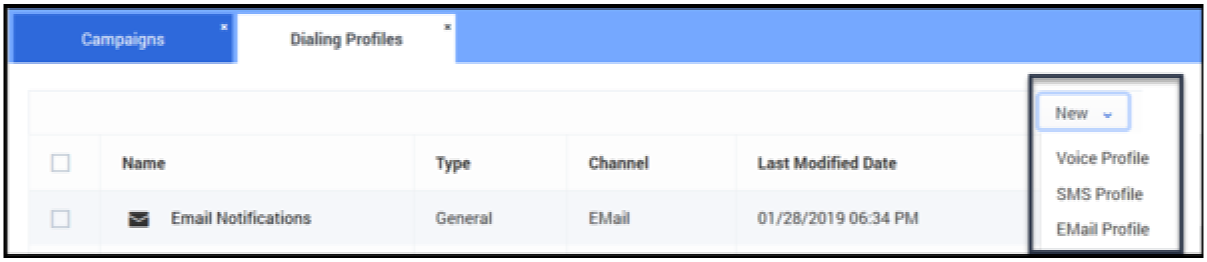
For more information about dialing modes and IVR modes, refer to the Dialing Modes and IVR Modes page.

The remainder of this article describes the following procedures:

- Create a dialing profile
- Edit a dialing profile
- Duplicate a dialing profile
- Delete a dialing profile

Create a Dialing Profile

To create a new dialing profile, on the Dialing Profile page, click **New** and select the type of dialing profile you want to create (Voice, SMS, or Email).



Use the tabs to define key campaign parameters. Click each tab below to learn about all available options.

General

Start of General Tab.
This tab has four sections, outlined in the table below.

Section	Description
General Options	To start, specify the following basic details about the dialing profile: • Name of the dialing profile • Agent Group (Voice channel only) - Agent groups are set up in either Genesys Administrator EXtension (GAX) or in Agent Setup. • Destination DN (Voice channel only) - The Voice Transfer Destination DN associated with the Campaign Group(s) created using this Dialing Profile. Destination DN identifies DN where the outbound calls are to be delivered for distribution to agents or IVR ports. The list of DNs available for selection is taken from the Agent Group Origination DNs list. • Caller ID Number (Voice channel only) - Specify the Caller ID number you want to use for the campaign group. You can set the global Caller ID number on the **Settings** page. • To use more than one Caller ID turn on the **Caller ID Set** switch option and click **Change**. For details see: Create and Manage Caller ID Sets > Assign a Caller ID Set.
Phone Number Filters	Next, you'll apply phone number filters to the contact lists that be will be part of this campaign. Note that the phone number filters available to you depend on the channel being used for this campaign. Refer to the Apply Phone Number Filters page for a description of the available phone

Section	Description
	number filters.
Rules and Strategies	In this next section, you'll see a list of attempt rules, location rules, and suppression lists that were marked as **Required** when they were created or imported. You can click **Change** to add additional rules or suppression lists, but you cannot remove them from this page. You must return to the Compliance Tools page or the Contact Suppression Lists page to uncheck the **Required** box for the rule or list you want to remove. Refer to the Attempt Rules, Location Rules, or Contact Suppression Lists pages for more information. You can also apply the following in this section: • Labels - Choose from a contact list labeling schema you created on the **Labels** page. **Note**: A contact list can have only one labeling schema. • Filtering Rule - Choose a filtering rule that, when applied, defines the way contact data is sorted and ordered. Unlike upload and selection rules, you can update apply or update a filtering rule dynamically, while a campaign group is running.
List Reset Options	Finally, if you want to restart a campaign after it has been paused or stopped/unloaded, you can specify the way in which CX Contact should retry the contact list. The options are outlined below.

End of General Tab.

Dialing

Start of Dialing Tab.

Use the **Dialing** tab to set important dialing parameters, such as the dialing mode, pacing options, and time constraints. This table below describes each section of the **Dialing** tab.

Section	Description
Dialing Modes and IVR modes	Choose a dialing mode or IVR mode, depending on the type of campaign you're running. For a detailed description of each dialing mode or IVR mode, refer to the Dialing Modes and IVR Modes page.
Optimization Parameters	If you select a Predictive dialing mode or Predictive IVR mode, you can select an optimization parameter. When you select an optimization parameter, the system adjusts call pacing to adhere to that parameter. Refer to the Pacing and Optimization page for a description of each optimization parameter and its associated dialing mode or IVR mode.
Pacing Options	Pacing defines the way in which contact attempts

Section	Description
	are made - you select the parameters and the dialing algorithm adjusts accordingly. Refer to the Pacing and Optimization page for a description of each pacing option and its associated dialing mode or IVR mode.
Time Constraints	Use the Time Constraints section (first enable **Constrain Pass Times**) to define when the system can and cannot attempt a record. When you define **never start passes before** and **always end passes by** options, a doughnut chart appears onscreen to display the duration of the allowable contact/broadcast window. Refer to the Define the Calling Window for information about time constraint options and to learn how to set a safe dialing window.

End of Dialing Tab

Treatment

Start of Treatment Tab.

A treatment defines what CX Contact should do with a call that does not reach the intended party.

This tab is broken down into the following sub-tabs:

- Delivery Options - define the circumstances in which the system should connect a call to an agent.
- Retry Options - define the way the system should respond to any given call result.
- SCXML-based treatments - specify the URI to an SCXML treatment script.
- Device Escalation - in the event a single record contains more than one device, you can identify which device(s) are contacted as well as the order in which they are contacted.

Click the links above to learn how to apply treatments and device escalation.

End of Treatment Tab.

Compliance

Start of Compliance Tab.

If you have a campaign using Predictive dialing and the Abandoned Call Rate optimization parameter, and you want the system to switch to Progressive dialing in the event the target abandon rate reaches your optimization goal (for example 3.1%) to eliminate the risk of further abandonment, you'll specify those values here. The system can then switch back to Predictive once the call abandon rate returns to an acceptable level (for example 2.9%).

End of Compliance Tab.

Content

Start of Content Tab.

> **Important**
> This tab only appears for campaigns using an SMS or Email channel.

Use this tab to create SMS or Email templates, depending on the channel. See the Create an SMS Template page or the Create an Email Template page for more information.

End of Content Tab.

Advanced

Start of Advanced Tab.

> **Important**
> Use these options only if you have advanced knowledge of CX Contact or have been advised by Customer Care.

On the **Advanced** tab, you can configure an unlimited number of arbitrary dialing options that provide additional functionality. Enter the option name and value that you want to apply to the campaign group here. Contact your account representative for more information about the available options.

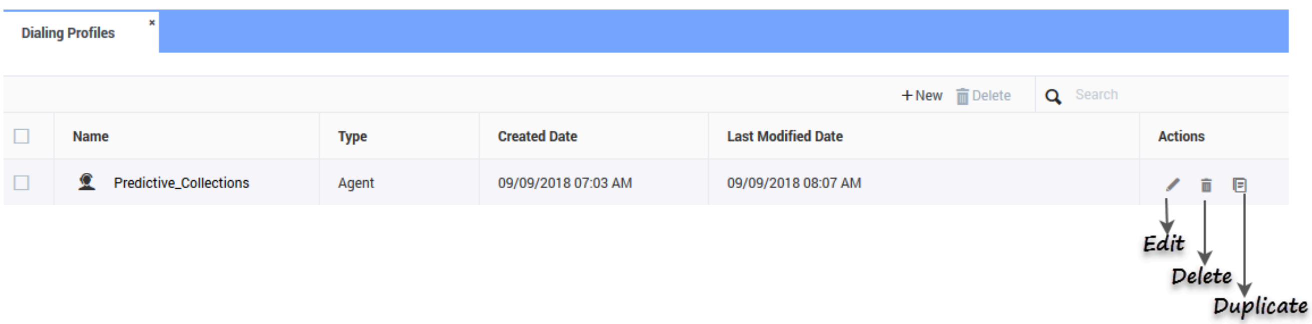
The pacing and dialing options available on this page are described in detail in the Pacing Options and Advanced Dialing Options sections on the Pacing and Optimization page in this manual.

End of Advanced Tab.

> ### Tip
> All options selected on the **Dialing Profiles** page become the default settings for all campaign group templates that use that dialing profile. When you create a new campaign group, however, you can change the settings for that one specific campaign group.

Manage a Dialing Profile

Once you have created a dialing profile, you can edit, delete, or duplicate the dialing profile from the main **Dialing Profiles** page. You can complete these tasks via the **Actions** menu on the main **Dialing Profiles** page.



Edit a Dialing Profile

To edit a dialing profile, click the dialing profile you want to edit and click the pencil icon from the **Actions** menu. This opens the dialing profile. Click any tab to edit the corresponding properties.

Duplicate a Dialing Profile

If you want to create a new dialing profile that inherits all the properties from an existing dialing profile, you can simply duplicate the existing dialing profile. To do that, select the dialing profile you want to duplicate and click the document icon from the **Actions** menu. The new dialing profile appears in the list of dialing profiles, with the suffix **_duplicate1** appended to its name.

Delete a Dialing Profile

To delete a dialing profile, select the dialing profile you want to delete, and click the trash can icon from the **Actions** menu.

Timezone Source

When you create a new dialing profile, you can specify a timezone source from the Timezone Source menu, and CX Contact will assign the timezone to a record accordingly.

The Timezone Source options are described below.

Timezone Source	Description
Device (Default)	CX Contact uses the device's country code and area code to determine the timezone.
Contact	CX Contact uses the postal code value provided in the customer record.
Contact then Device	CX Contact uses the postal code value. If none is provided, it refers to the Device field.
Contact and Device	The system compares the device's area code and the contact's timezone provided in the record. If there is a timezone mismatch between the two pieces of information, the record will only be dialed during a 'safe' window – meaning the system doesn't start to attempt records until the latest timezone window opens and the system stops all attempts when the earliest timezone window closes. To define this calling window, you must set the Constrain Pass Time options for a campaign group to the hours that fall within this safe dialing window and you must use the local timezone option. Refer to the Define the Calling Window page for more information.
Explicit	If you select **Explicit** from the Timezone Source menu, you can specify a timezone in the **Choose Timezone** menu in the **Time Constraints** section of the **Dialing** tab. When you do this, the system applies that timezone to all records in the contact list and ignores all Contact and Device timezone assignments. Important We do not recommend this option if your contact list contains international numbers or countries with multiple timezones.

Where to enable	On the Dialing tab when you create or edit any of the following: • Dialing Profile

	• Campaign Template • Campaign Group

Related Topics

- Campaign Structure and Terminology
- Create and Manage a Campaign Template
- Create and Manage a Campaign Group
- Create and Manage Contacts and Contact Lists

Create a Campaign Template

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.

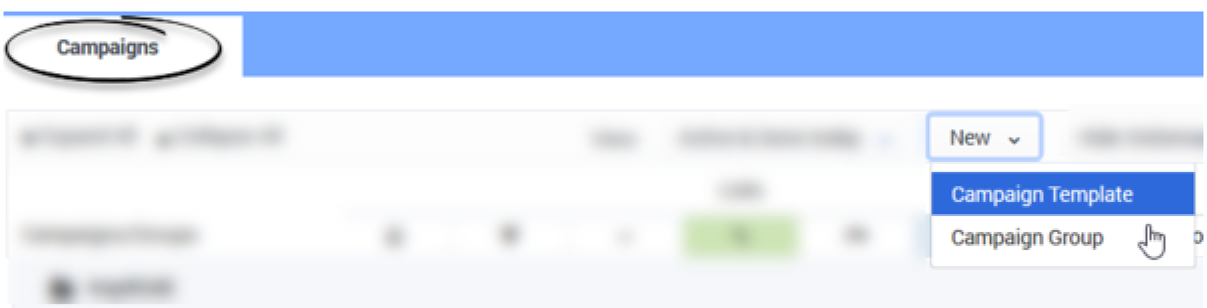
This article describes how to create and manage a campaign template. For general information about campaign templates and how they fit into the overall campaign structure, refer to the Campaign Structure and Terminology page.

Create a Campaign Template

Important

Before you can create a campaign template, you must create a session profile and a dialing profile.

On the Campaigns page, click **New -> Campaign Template**.



The options you set on the dialing profile page automatically populate on each of the five tabs presented below. You can change any or all of these options for this particular campaign template. Any campaign group you create from this campaign template will inherit these settings.

General

Start of General Tab.
This page is broken up in to sections, as described in the table below.

Section	Description
General Options	To start, you'll specify the following basic details about the campaign template. • Name of the campaign template • Channel - The type of channel being used for the campaign (Voice, SMS, or Email) automatically populates here. • Agent Group (Voice channel only) • Destination DN (Voice channel only) **Note:** The following DNs can be selected when configuring Destination DN (Voice transfer destination DN) for the Campaign Group or Campaign Template: • The Destination DN specified in the Session Profile used to create the Campaign Template. • All DNs (if present) specified as Origination DNs in the properties associated with the Agent Group used to create Dialing Profile, Campaign Template or Campaign Group. • Caller ID Number (Voice channel only) - The Caller ID Number associated with the campaign. **Note:** You can set the global Caller ID number on the Settings page. • To use more than one Caller ID turn on the **Caller ID Set** switch option and click **Change**. For details see: Create and Manage Caller ID Sets > Assign a Caller ID Set.
Phone Number Filters	Next, you'll apply phone number filters to the contact lists that be will be part of this campaign. Refer to the Apply Phone Number Filters to a Contact List page for a description of the available phone number filters.
Rules and Strategies	In this next section, you'll see a list of attempt rules, location rules, and suppression lists that were marked as **Required** when they were created or imported. You can click Change to add additional rules or suppression lists, but you cannot remove them from this page. You must return to the Compliance Tools page or the Contact Suppression Lists page to uncheck the **Required** box. Refer to the Attempt Rules, Location Rules, or Contact Suppression Lists pages for more information. You can also apply the following in this section:

Section	Description
	• Labels - Choose from a contact list labeling schema you created on the Labels page. **Note**: A contact list can have only one labeling schema. • Filtering Rule - Choose a filtering rule that, when applied, when applied, defines the way contact data is sorted and ordered. Unlike upload and selection rules, you can update apply or update a filtering rule dynamically, while a campaign group is running.
List Reset Options	Finally, if you want to restart a campaign after it has been paused or stopped/unloaded, you can specify the way in which CX Contact should retry the contact list. The options are outlined below.

End of General Tab.

Dialing

Start of Dialing Tab.

Use the Dialing tab to set important dialing parameters, such as the dialing mode, pacing options, and time constraints. This table below describes each section of the Dialing tab.

Section	Description
Dialing Modes and IVR Modes	Choose a dialing mode or IVR mode, depending on the type of campaign you're running. For a detailed description of each dialing mode or IVR mode, refer to the Dialing Modes and IVR Modes page.
Optimization Parameters	If you select a Predictive dialing mode or Predictive IVR mode, you can select an optimization parameter. When you select an optimization parameter, the system adjusts call pacing to adhere to that parameter. Refer to the Pacing and Optimization page for a description of each optimization parameter and its associated dialing mode or IVR mode.
Pacing Options	Pacing defines the way in which contact attempts are made - you select the parameters and the dialing algorithm adjusts accordingly. Refer to the Pacing and Optimization page for a description of each pacing option and its associated dialing mode or IVR mode.
Time Constraints	Use the Time Constraints section (first enable Constrain Pass Times) to define when the system can and cannot attempt a record. Refer to the Define the Calling Window for information about time constraint options and to learn how to set a

Section	Description
	safe dialing window.

End of Dialing Tab

Treatment

Start of Treatment Tab.

A treatment defines what CX Contact should do with a call that does not reach the intended party.

This tab is broken down into the following sub-tabs:

- Delivery Options - define the circumstances in which the system should connect a call to an agent.
- Retry Options - define the way the system should respond to any given call result.
- SCXML-based treatments - specify the URI to an SCXML treatment script.
- Device Escalation - in the event a single record contains more than one device, you can identify which device(s) are contacted as well as the order in which they are contacted.

Click the links above to learn how to apply treatments and device escalation.

End of Treatment Tab.

Compliance

Start of Compliance Tab.

If you have a campaign using Predictive dialing and the Abandoned Call Rate optimization parameter, and you want the system to switch to Progressive dialing in the event the target abandon rate reaches your optimization goal (for example 3.1%) to eliminate the risk of further abandonment, you'll specify those values here. The system can then switch back to Predictive once the call abandon rate returns to an acceptable level (for example 2.9%).

End of Compliance Tab.

Content

Start of Content Tab.

> **Important**
> This tab only appears for campaigns using an SMS or Email channel.

Use this tab to create SMS or Email templates, depending on the channel. See the Create an SMS Template page or the Create an Email Template page for more information.

End of Content Tab.

Advanced

Start of Advanced Tab.

> **Important**
> Use these options only if you have advanced knowledge of CX Contact or have been advised by Customer Care.

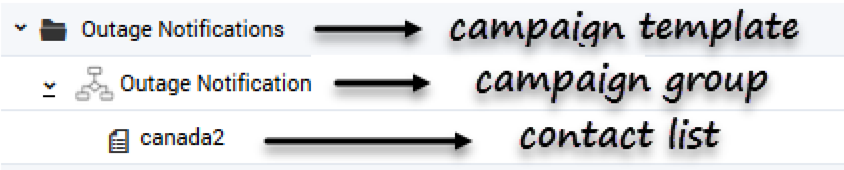
On the **Advanced** tab, you can configure an unlimited number of arbitrary dialing options that provide additional functionality. Enter the option name and value that you want to apply to the campaign group here. Contact your account representative for more information about the available options.

The pacing and dialing options available on this page are described in detail in the Pacing Options and Advanced Dialing Options sections on the Pacing and Optimization page in this manual.

End of Advanced Tab.

> **Tip**
> All options selected on the **Dialing Profiles** page become the default settings for all campaign group templates that use that dialing profile. When you create a new campaign group, however, you can change the settings for that one specific campaign group.

Once it's created, the campaign template appears as a folder on the campaigns dashboard. You're now ready to create a campaign group from the campaign template you just created.



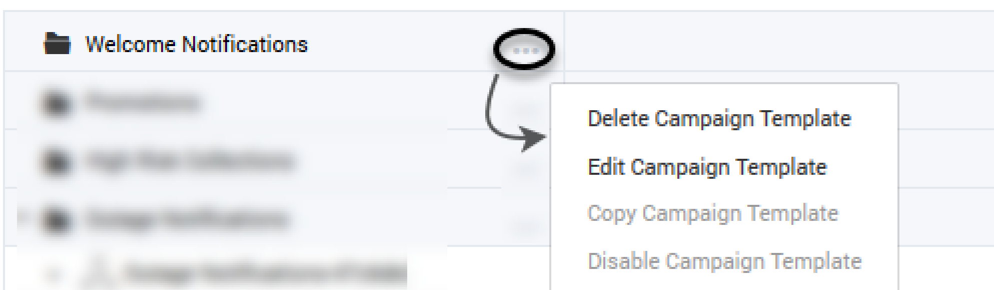
Edit or Delete a Campaign Template

To edit a campaign template, go to the campaigns dashboard and do one of the following:

- Click the name of the campaign template to open and edit its properties OR
- Click the **More Actions** menu (displays as an Ellipsis) displayed next to the campaign template and select **Edit Campaign Template**.

To delete a campaign template, go to the campaigns dashboard, click the **More Actions** menu (displays as an Ellipsis) displayed next to the campaign template and select the **Delete** option.

> **Important**
> You can only delete a campaign template if it does not have a campaign group.



Related Topics

- Campaign Structure and Terminology
- Create a Dialing Profile
- Create a Campaign Group

- Compliance Tools

Create a Campaign Group

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.

This article describes how to set up and manage a campaign group.

The following topics are covered in this article:

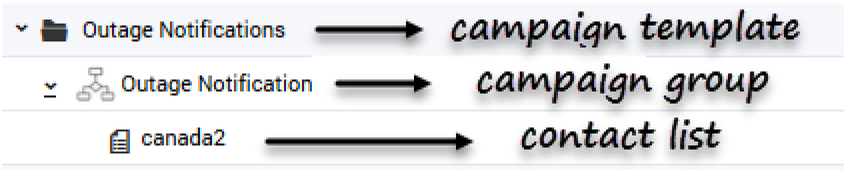
- Introduction
- Create a campaign group
- Edit a campaign group
- Delete a campaign group
- Start a campaign group in a Paused state
- Start, pause, or stop a campaign group - includes information about List Reset options
- Automatically complete a campaign group upon record depletion

Introduction

This section provides basic information about working with identifying campaign groups in the user interface. For general information about campaign groups and how they fit into the overall campaign structure, refer to the Campaign Structure and Terminology page.

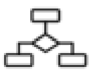
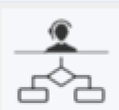
Identifying Campaign Groups on the Campaigns Page

Once a campaign group is created, it appears on the campaigns dashboard, regardless of whether it's running. You can click any campaign group at any time to view and edit its settings (refer to the Edit a Campaign Group to view editing restrictions while a campaign group is running).

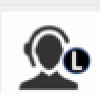
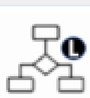
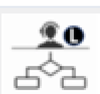


Campaign Group Icons

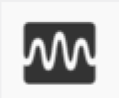
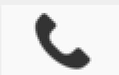
An icon next to the name of each campaign group identifies the type of dialing or IVR mode(s) being used. The table below describes the five types of icons.

Icon	Dialing Mode	Type of Dialing Profile
	Predictive, Progressive (with or without Seizing) or Push or Pull Preview	Agent
	Power IVR	IVR
	Predictive IVR or Progressive IVR	Agent
	Power IVR (for SMS alerts)	Alert
	Power IVR (for Email alerts)	General

To visually inform you that LIFO has been enabled within an existing dialing mode the dialing icons will appear as shown in the following table.

Icon	LIFO Mode	Type of Dialing Profile
	Predictive, Progressive (with or without Seizing) or Push or Pull Preview with LIFO	Agent / LIFO
	Power IVR with LIFO.	IVR / LIFO
	Predictive IVR or Progressive IVR with LIFO	Agent / LIFO

To the right of a campaign group name, an icon identifies the dialing mode the campaign group uses. Hover over that icon to see the name of the dialing mode and a list of associated dialing parameters. The table below describes the dialing mode associated with each icon and the dialing parameters that display onscreen when you hover over the icon.

Icon	Dialing Mode	Dialing Parameters
	Progressive IVR, Predictive IVR, or Power IVR	Dialing mode, number of IVR ports, calls per minute
	Push or Pull Preview	Dialing mode only
	Predictive or Progressive (with or without Seizing)	Dialing mode, optimization parameter, optimization value, and number of ports
	Power IVR (for SMS alerts)	Dialing mode, optimization parameter, optimization value, and number of ports
	Power IVR (for Email alerts)	Dialing mode, optimization parameter, optimization value, and number of ports

For more information about Dialing Modes and IVR Modes, refer to the Dialing Modes and IVR Modes page.

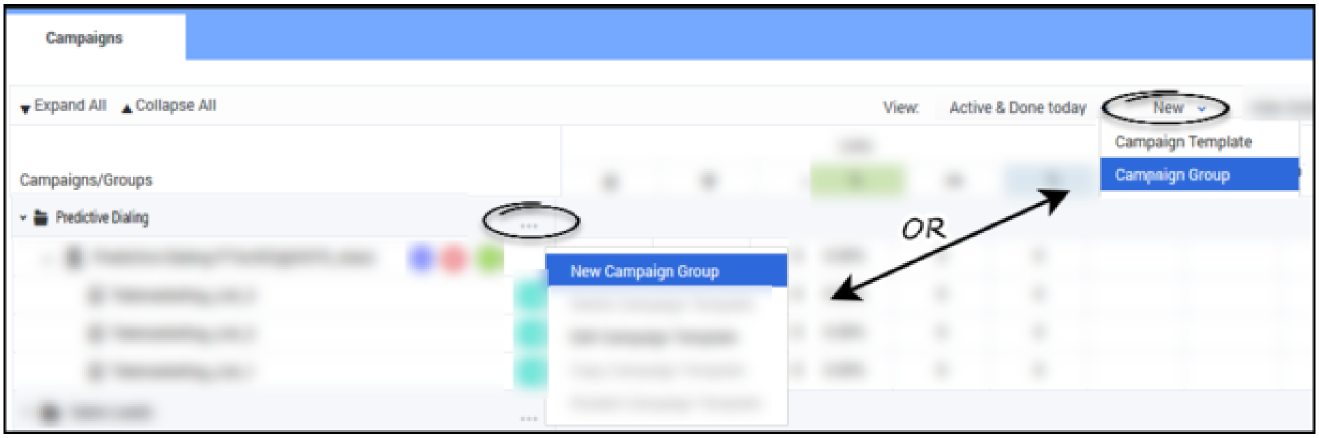
Create a Campaign Group

Important

Before you can create a campaign group, you must create a session profile, a dialing profile, and a campaign template.

You can create a campaign group in one of two ways on the Campaigns page.

- Option 1: From the **New** menu, select **Campaign Group**.
- Option 2: From the **More Actions** menu (displayed as an ellipsis) next to the name of the campaign template for the campaign group, select **New Campaign Group**. If you use this option, the campaign template and its associated parameters will automatically populate on the **New Campaign Group** page.



Then, on the **New Campaign Group** page, configure the options in each of the six tabs, as described in the tabs below.

General

Start of General Tab.
This page is broken up into sections, as described in the table below.

Section	Description
General Options	To begin, specify the following: • Campaign Template - select the campaign template for this campaign group. **Note:** if you created the campaign group using the Option 2 method outlined above, the campaign template and its associated parameters will automatically populate here. • Channel - The type of channel being used for the campaign (Voice, SMS, or Email) automatically populates here. • Contact Lists - The contacts that should receive the campaign. • Agent Group Important You cannot edit an Agent Group or Destination DN for a campaign group that is currently running. In that case, you need to stop the campaign group, edit the Agent Group and/or Destination DN, and then resume the campaign group. • One or more Contact Lists - Select at least one contact list for the campaign group.

Section	Description

	• Destination DN (Voice channel only)
	  • The Destination DN specified in the Session Profile used to create the Campaign Template.
	  • All DNs (if present) specified as Origination DNs in the properties associated with the Agent Group used to create Dialing Profile, Campaign Template or Campaign Group.
	
	Note: The above DNs can be selected when configuring Destination DN (Voice transfer destination DN) for the Campaign Group or Campaign Template:
	
	• Caller ID Number (Voice channel only) - The Caller ID associated with the campaign. **Note:** You can set the global Caller ID number on the Settings page.
	• Caller ID Set - To use more than one Caller ID turn on the **Caller ID Set** switch option and click **Change**. For details see: Create and Manage Caller ID Sets > Assign a Caller ID Set.

Phone Number Filters	Next, you'll apply phone number filters to the contact lists that be will be part of this campaign. Refer to the Apply Phone Number Filters to a Contact List page for a description of the available phone number filters.
Rules and Strategies	In this next section, you'll see a list of attempt rules, location rules, custom rules, contact times, and suppression lists that were marked as **Required** when they were created or imported. You can click **Change** to add additional rules or suppression lists, but you cannot remove them from this page. You must return to the Compliance Tools page or the Contact Suppression Lists page to uncheck the **Required** box. Refer to the Attempt Rules, Custom Rules, Location Rules, Contact Times, or Contact Suppression Lists pages for more information. You can also apply the following in this section: • Labels - Choose a labeling schema you created on the **Labels** page. **Note**: A contact list can have only one labeling schema. • Filtering Rule - Choose a filtering rule that, when applied, defines the way contact data is sorted and ordered. You can update apply or update a filtering rule when a campaign group is inactive/stopped.
List Reset	Finally, if you want to restart a campaign after it has been paused or stopped/unloaded, you can specify the way in which CX Contact should retry the contact list. The options are outlined below.

End of General Tab.

Dialing

Start of Dialing Tab. Use the **Dialing** tab to set important dialing parameters, such as the dialing mode, pacing options, and time constraints. This table below describes each section of the **Dialing** tab.

Section	Description
Dialing Modes and IVR Modes	Choose a dialing mode or IVR mode, depending on the type of campaign you're running. For a detailed description of each dialing mode and IVR mode, refer to the Dialing Modes and IVR Modes page.
Optimization Parameters	If you select a Predictive dialing mode or Predictive IVR mode, you can select an optimization parameter. When you select an optimization parameter, the system adjusts call pacing to adhere to that parameter. Refer to the Pacing and Optimization page for a description of each optimization parameter and its associated dialing mode or IVR mode.
Pacing Options	Pacing defines the way in which contact attempts are made - you select the parameters and the dialing algorithm adjusts accordingly. Refer to the Pacing and Optimization page for a description of each pacing option and its associated dialing mode or IVR mode.
Time Constraints	Use the Time Constraints section (first enable Constrain Pass Times) to define when the system can and cannot attempt a record. Refer to the Define the Calling Window for information about time constraint options and to learn how to set a safe dialing window.

End of Dialing Tab

List Options

Start of List Options Tab.

> ## Important
> The **List Options** tab is available at the campaign group level only. You will not see this tab when creating or editing a dialing profile or a campaign template.

If you have a campaign group with more than one contact list, you can use this tab to assign each list a relative weight, which represents the ratio of records that will be retrieved from a contact list for the campaign group.

To learn how to use this feature, refer to the Assign Weights to Contact Lists page in this manual.

The table below describes each section of the **List Options** tab

Section	Description
Enable List Options	Enables/disables the following options: • Never start before • Always end by • Timezone source • Timezone • Filtering Rule
Never start before	Indicates the earliest possible start time at which the system can dial records.
Always end by	Indicates the earliest possible end time at which the system can dial records.
Timezone source	Indicates from where the timezone is derived. For additional information see: Time Zone Assignment.
Timezone	Enables you to define an explicit timezone. The default is the local timezone. For additional information see: Time Zone Assignment.
Filtering Rule	Indicates the way data is sorted and ordered. For additional information see: Create a Filtering Rule.
Exclamation mark	Contains a tool tip that indicates that the Enable List Options option is turned on.

End of List Options Tab

Treatment

Start of Treatment Tab. A treatment defines what CX Contact should do with a call that does not reach the intended party. This tab is broken down into the following sub-tabs:

- Delivery Options - define the circumstances in which the system should connect a call to an agent.
- Retry Options - define the way the system should respond to any given call result.
- SCXML-based treatments - specify the URI to an SCXML treatment script.
- Device Escalation - in the event a single record contains more than one device, you can identify which device(s) are contacted as well as the order in which they are contacted.

Click the links above to learn how to apply treatments and device escalation.

End of Treatment Tab.

Compliance

Start of Compliance Tab. If you have a campaign using Predictive dialing and the Abandoned Call Rate optimization parameter, and you want the system to switch to Progressive dialing in the event the target abandon rate reaches your optimization goal (for example 3.1%) to eliminate the risk of further abandonment, you'll specify those values here. The system can then switch back to Predictive once the call abandon rate returns to an acceptable level (for example 2.9%).

End of Compliance Tab.

Content

Start of Content Tab.

> **Important**
> This tab only appears for campaigns using an SMS or Email channel.

Use this tab to create SMS or Email templates, depending on the channel. See the Create an SMS Template page or the Create an Email Template page for more information.

End of Content Tab.

Advanced

Start of Advanced Tab.

Important

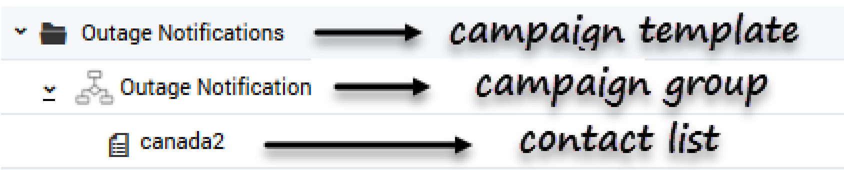
Use these options only if you have advanced knowledge of CX Contact or have been advised by Customer Care.

On the **Advanced** tab, you can configure an unlimited number of arbitrary dialing options that provide additional functionality. Enter the option name and value that you want to apply to the campaign group here. Contact your account representative for more information about the available options.

The pacing and dialing options available on this page are described in detail in the Pacing Options and Advanced Dialing Options sections on the Pacing and Optimization page in this manual.

End of Advanced Tab.

When you're finished, the campaign group and its contact lists will appear on the campaigns dashboard.



Edit a Campaign Group

To edit a campaign group, go to the campaigns dashboard and click the name of the campaign group to open and edit its properties.

Edit Settings for Active Campaign Groups

In most cases, you can edit a campaign group setting while the campaign group is running. In some cases, however, a setting cannot be changed, or it can be changed only if you first pause the campaign group, make the necessary changes, and then resume the campaign group.

The table below lists each campaign group setting and the condition under which each setting can be changed.

[+] Show table

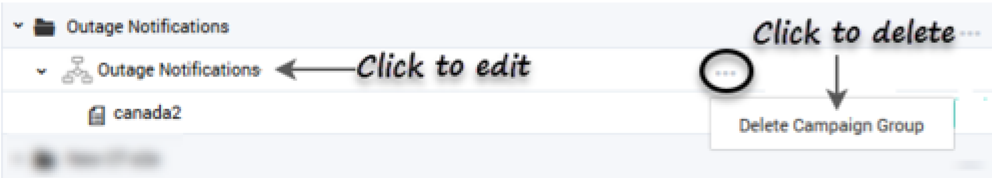
Tab	Setting	While Campaign Group is Running	While Campaign is Active	While Campaign is not Active/ Running	No Changes Allowed
General Tab	Campaign Template				●
	Channel	●	●	●	
	Contact List	●	●	●	
	Agent Group			●	
	Destination DN			●	
	Caller ID Number			●	
	Phone Number Filters		●	●	
	Attempt Rules, Location Rules, Custom Rules, Contact Times	●	●	●	
	Contact Suppression Lists	●	●	●	
	Filtering Rule			●	
	Lists Reset			●	
	Start Paused			●	
	Complete if no more records	●	●	●	

Tab	Setting	While Campaign Group is Running	While Campaign is Active	While Campaign is not Active/ Running	No Changes Allowed
Dialing Tab	IVR Modes - Switch between On and Off				●
	LIFO Modes - Switch between On and Off				●
	Dialing Mode - Change Predictive to Progressive		●	●	
	Change Predictive or Progressive to Push/Pull Preview		●	●	
	Change Predictive IVR to Progressive IVR or Power IVR		●	●	
	Change Predictive IVR or Progressive IVR to Push/Pull Preview Dialing		●	●	
	Change between Predictive with Seizing and Progressive with Seizing		●	●	
	Optimization Parameters and Goals	●	●	●	
	IVR Port Assignment	●	●	●	
	Small Group Mode	●	●	●	
	Constrain Start and End Time			●	
List Options Tab	Change List Weights	●	●	●	
Treatment Tab	All Delivery Options			●	

Tab	Setting	While Campaign Group is Running	While Campaign is Active	While Campaign is not Active/ Running	No Changes Allowed
	All Retry Options			●	
Compliance Tab	Abandon Rate - switch between Predictive and Progressive	●	●	●	
Advanced Tab	Advanced Options (add, edit, delete)	●	●	●	
	Answer Type Recognition	●	●	●	
	Timeguard Timeout	●	●	●	
	Minimum and Optimum Buffer	●	●	●	
	Average Inbound and Outbound Call Duration	●	●	●	
	Inbound Rate	●	●	●	
	Ignore very long calls	●	●	●	
	Reserve Agents for Inbound	●	●	●	

Delete a Campaign Group

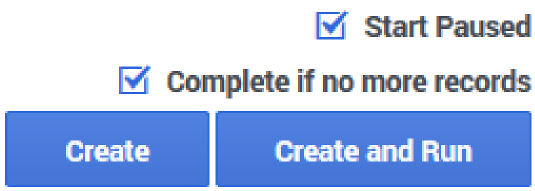
To delete a campaign group, go to the campaigns dashboard, click the **More Actions** menu (displays as an Ellipsis) displayed next to the campaign group and select **Delete Campaign Group**.



Start a Campaign Group in a Paused State

If, after creating the campaign group, you don't want to begin dialing immediately, you can put the campaign group in a paused state and then manually start the campaign group at a later time.

To do this, check **Start Paused** from the **New Campaign Group** page.



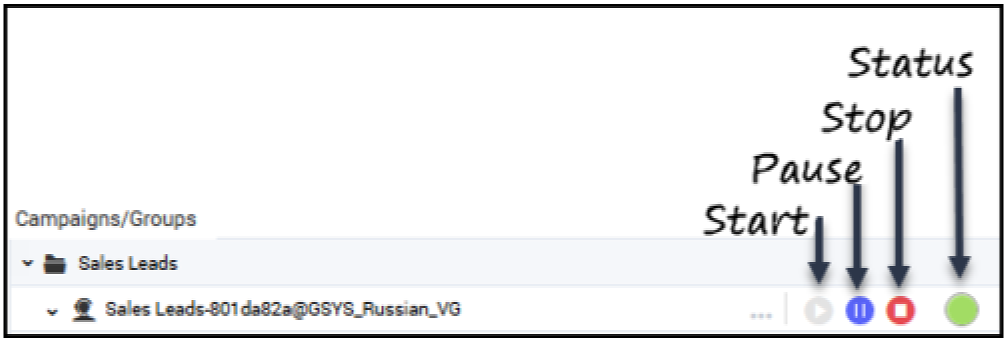
Start, Pause, or Stop a Campaign Group

On the campaigns dashboard, use the media controls next to each campaign group to start, pause, or stop dialing activity.

- Start - Starts or resumes dialing.
- Pause - Pauses dialing activity.
- Stop - Stops (unloads) dialing entirely. **Note**: Stopping a campaign group resets all campaign group statistics.

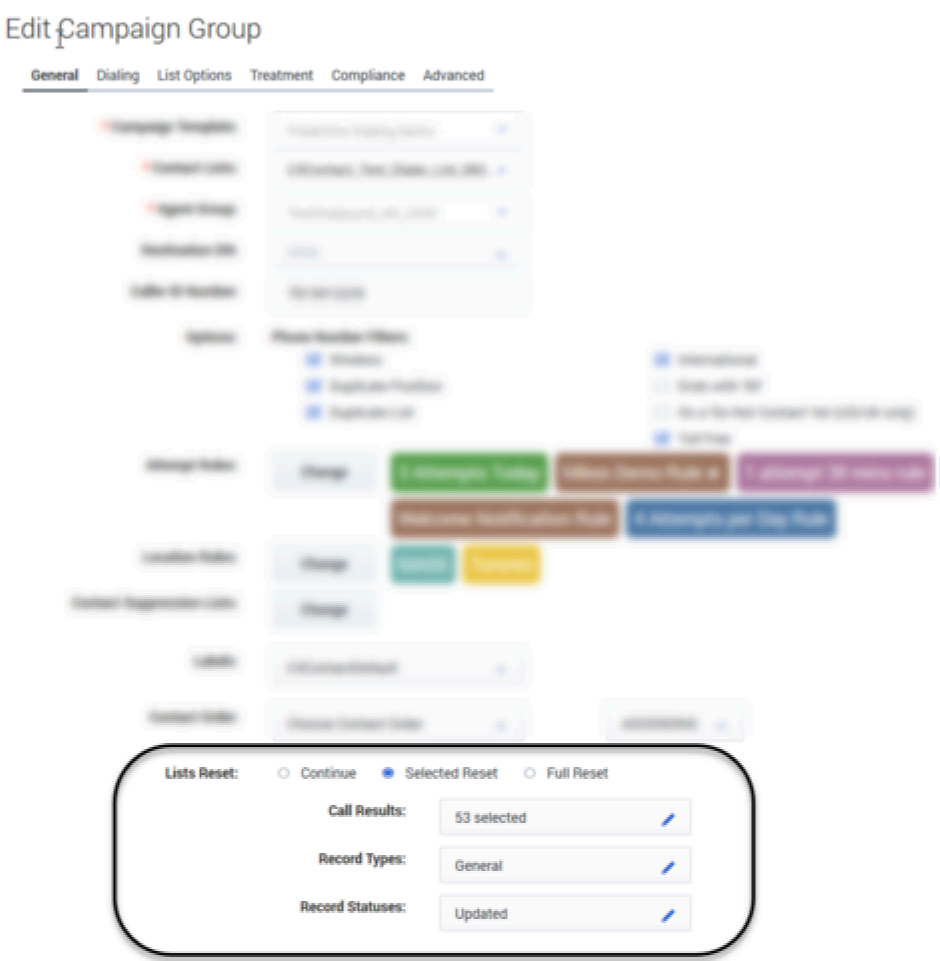
A status bulb next to the media controls indicates the current status of any campaign group and uses the following color schme:

- Green - Active/Running
- Blue - Paused
- Grey - Inactive



List Reset Options

In the event you pause and then restart a campaign, you can specify the way in which CX Contact should retry the contact list. You'll do this on the **General** tab for the campaign object.



The **List Reset** options are as follows:

- Continue (Default) - CX Contact resumes dialing against the contact list.

- Full Reset - CX Contact resets the contact list and starts dialing without any consideration for previous call results achieved.
- Selected Reset - CX Contact retries a contact list based on selected call results. A list reset occurs under any of the following conditions:
  - Call Result - Specify the call result(s) you want included in the retry.
  - Record Type - Select the record types you want included in the retry.
  - Record Status - Select the record status you want included in the retry, as follows:
    - Ready - The record is ready to be dialed. It has not yet been attempted.
    - Retrieved - The record is retrieved from the database and is currently being processed.
    - Updated (Default) - The record has been processed and updated in the database.

Automatically Complete a Campaign Group Upon Record Depletion

In the event all contact list records have been attempted and retry parameters depleted, CX Contact will automatically stop the campaign group and send a toast notification to all affected agents to advise that the campaign has been unloaded.

To enable this, check **Complete if no more records** on the New Campaign Group page.

When you're finished, select **Create** or **Create and Run**.

> **Important**
> This option is only available for campaign groups that are not currently running. If you want to apply this option to a campaign group that is currently running, you must first stop the campaign group, select this option, and then resume the campaign group.

Related Topics

- Create a Campaign Template
- Create a Dialing Profile
- Campaign Structure and Terminology

Create an SMS Template

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.

If you plan to run a campaign using the SMS channel, you can build and modify SMS templates in CX Contact. This page explains how.

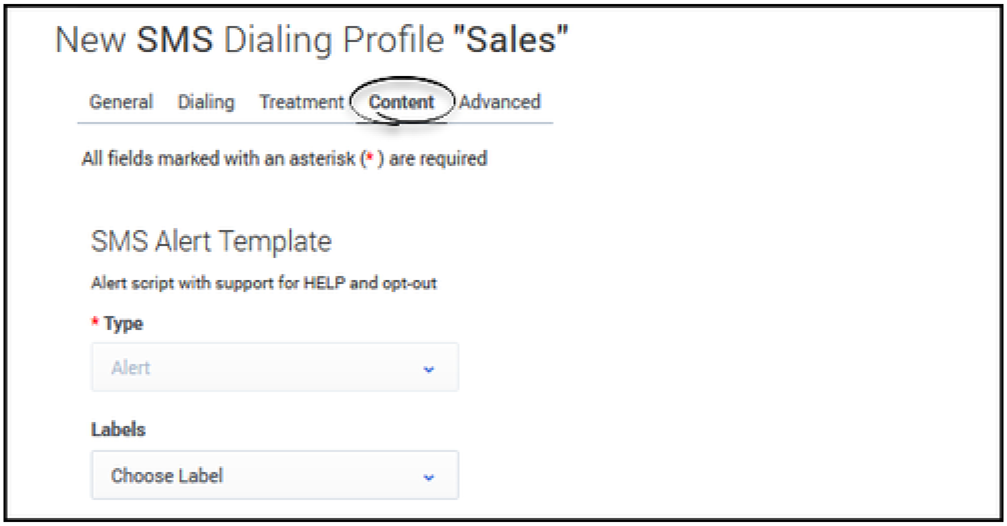
Important

Currently, CX Contact supports Alert templates only.

Create SMS Content

To get started, you need to create an SMS dialing profile

When you set up your SMS profile, you'll see a tab named **Content**. This is where you'll create a template for an SMS message and one for responses to Help and Opt-out requests from customers.



To begin, specify the following:

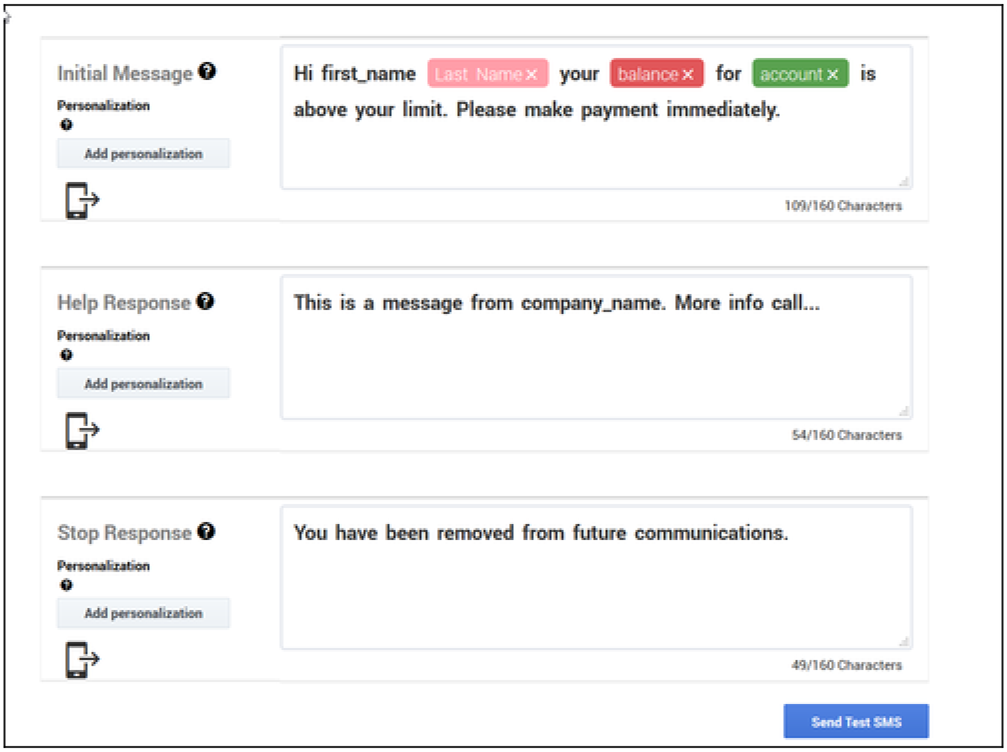
- Type - Select **Alert**. (Future releases will include support for additional types of SMS templates).
- Labels - If you plan to personalize messages using fields you defined in a labeling schema, select the labeling schema here. Otherwise, the Pesonalization menu will populate the default CX Contact list fields. See the Personalized Content section below for more information.
- Use Smart Filter - When enabled (default), CX Contact removes unnecessary symbols, spaces, and line breaks before sending the text message.

Now, insert the text into the message body for each type of alert message:

- Initial Message - The initial outbound message, also known as the Message Termination (MT).
- Help Response - The response used when a customer texts the Help or Info keyword. See the Supported Keywords section for a list of supported keywords.
- Opt-out/Stop Response - The response used when a customer texts the **STOP** keyword. Those customers are automatically added to the suppression list. Additional Supported Keywords such as, Unsubscribe, Cancel, Quit, and END will also automatically add the customers device/mobile number to the suppression list.

Important

ARRET and UNSUB are supported Opt-Out/Stop responses for Canada.



Supported Keywords

The following is a list of supported keywords. These are not case sensitive.

- Help
- Info
- Stop
- Unsubscribe
- Cancel
- Quit

Character Length in Message Bodies

There is no limit to the amount of characters in the message body text, but sending an SMS with more than 160 characters is enabled with SMS Concatenation. Also, when using Personalized content, those field values count toward the maximum field length. Every tag counts as 10 characters.

Important

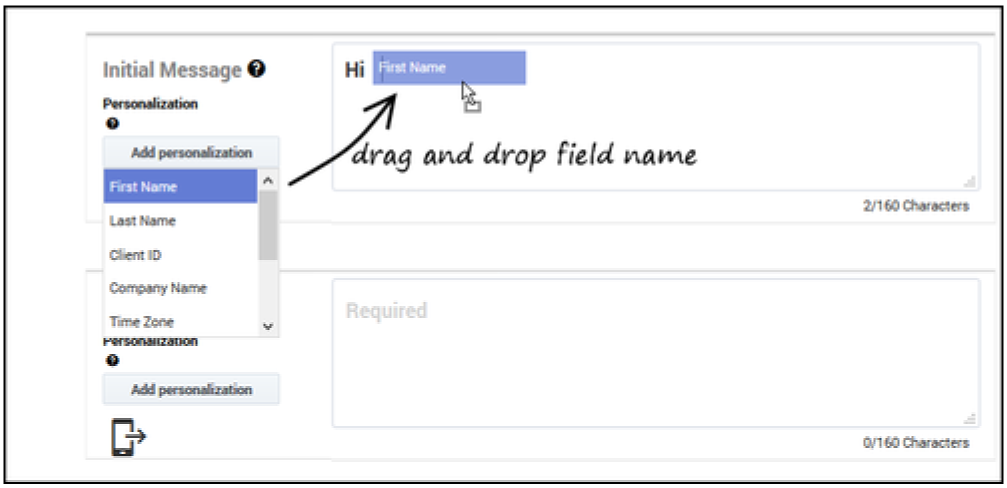
Delivering content with more than 160 characters requires the system to send multiple SMS messages. Since each SMS incurs costs, please consider this when

> creating content over 160 characters.

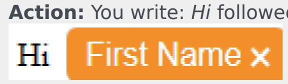
Personalized Content

To personalize a message (for example, greet the customer by name):

1. Select the labeling schema from the Labels menu
2. Fom the personalization menu, drag the contact list field name to the body of the message.



> ### Important
> When you use the personalization feature, we recommend you always use the **Send SMS Test** option to ensure the template populates as expected.

Scenario	**Action:** You write: *Hi* followed by the *First Name* tag:  **Result:** The system scans the contact's information and finds that the *First Name* value for this contact is John. The customer receives the following text message: *Hi John.*

Create an Email Template

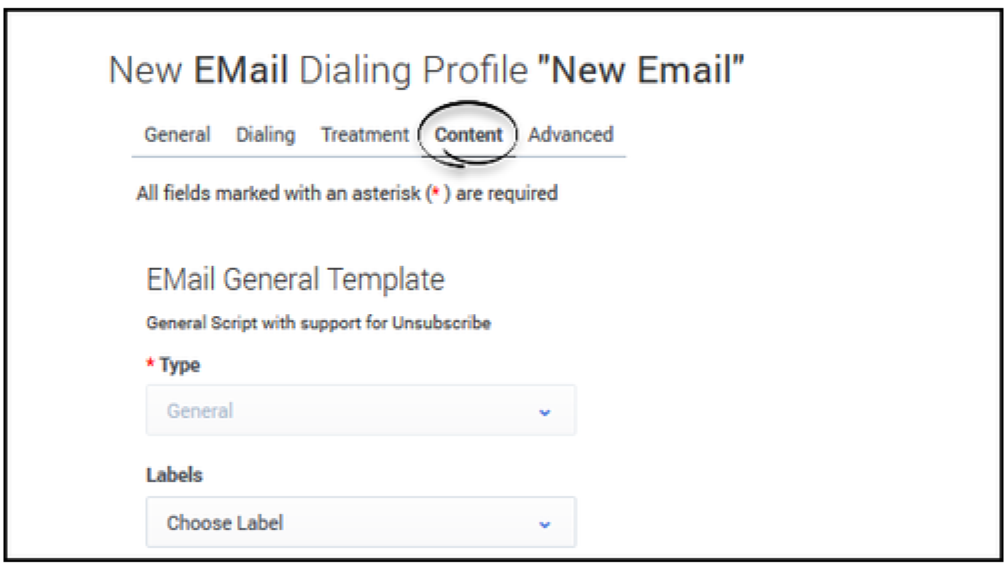
Important

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.

If you plan to run a campaign using the email channel, you can build and modify email templates in CX Contact. This page explains how.

To get started, you need to create an Email dialing profile

When you set up your email profile, you'll see a tab named **Content**. This is where you'll create the email content and specify all associated parameters.



To begin, specify the following general information:

- Type - **General** is the only option. (Future releases will include support for additional types of Email templates).
- Labels - If you plan to personalize messages using fields you defined in a labeling schema, select the labeling schema here. Otherwise, the Pesonalization menu will populate the default CX Contact list fields. See the Personalized Content section below for more information.
- From - Specify the sender's email address.

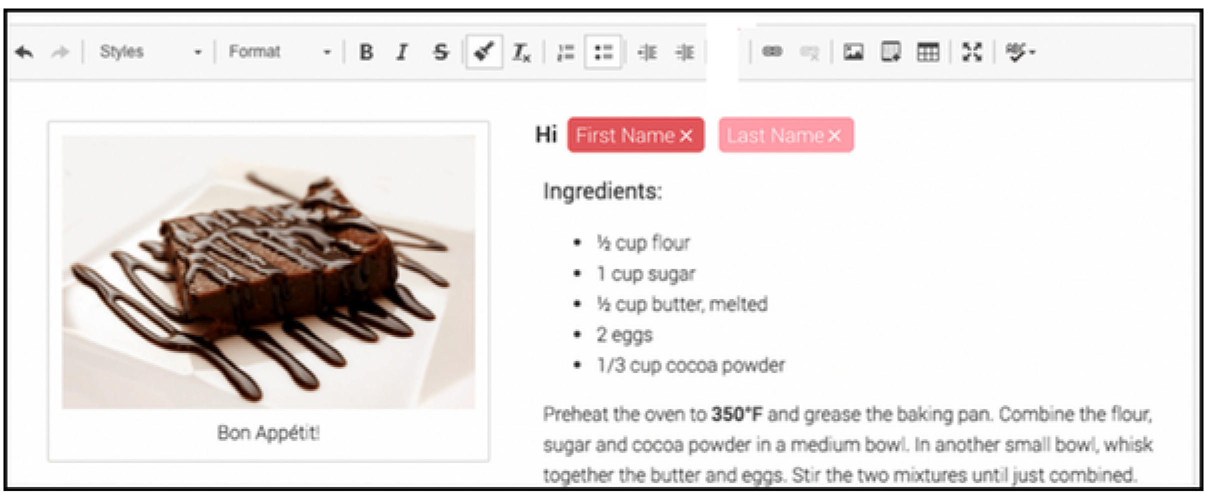
- Reply to - Specify the email address that accepts responses to the original email.
- Subject - The text that appears in the subject line of the email. This text can be personalized.
- Enable Friendly Options - If you enable friendly options, you can specify easily identifiable names in the **To**, **From**, and **Reply to** fields. The text in these fields can be personalized.

Create Message Content

You have two options for creating email content: use the visual editor to create and format all message content or upload an HTML file containing the message content.

Visual Editor

To use the visual editor, set the **Use Visual Editor** switch to the **On** position. The visual editor box appears onscreen, enabling you to create and format text and graphics.



HTML File

To upload an HTML file containing the message content, go to **Browse for HTML -> Select File**. Two new options appear onscreen:

- Preview - Used to view the message content contained in the HTML file.
- Send Test Email - Used to confirm that the email can be successfully delivered and received.

Personalize Message Content

You can personalize message content in the following sections of an email:

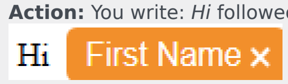
- In the subject line
- When using 'friendly' options - the **To**, **From**, and **Reply to** fields
- In the body of an email

The instructions for adding personalized content to a body of a message depend on whether you're using the visual editor to create content or importing an HTML file that contains the content.

Visual Editor

To personalize content when using the visual editor:

1. Select the labeling schema from the Labels menu.
2. From the Personalization menu, drag the contact list field name tag to the body of the message.

Scenario	**Action:** You write: *Hi* followed by the *First Name* tag:  **Result:** The system scans the contact's information and finds that the *First Name* value for this contact is John. The customer receives the following email message: *Hi John*

HTML File

Personalizations in imported HTML

To personalize the content in an imported HTML file, use the following format: `tag <t>` and `attribute value`. The value must contain the exact name of the value from the list of allowed send attributes.

Examples:

- <p>Lorem <t value="$first_name">First Name</t> ipsum</p>
- <p>Lorem <t value="$first_name"></t> ipsum</p>
- <t value="$first_name"></t>
- <t value="$first_name"/>

Add an Unsubscribe Link

To provide customers with the option to unsubscribe from your mailing list:

1. Set the **Enable Unsubscribe** switch to the **On**.
2. Provide the Unsubscribe Confirmation page **URI**.
   Once the **Enable Unsubscribe** switch is set to ON, an additional **Unsubscribe page link** personalization becomes available in the personalizations list.
3. Include the **Unsubscribe page link** personalization to your email template. For example, "To unsubscribe follow this link: < Unsubscribe Page Link >.

> **Important**
> It is the user's responsibility to provide the Unsubscribe page content, hosting and unsubscribe functionality.

Create and Manage Caller ID Sets

> **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.

To increase your market penetration rate and spread awareness of your brand or product, add a Caller ID Set to your Outbound Campaign. With a Caller ID Set you can control what appears on the called phones per-campaign or per-call.

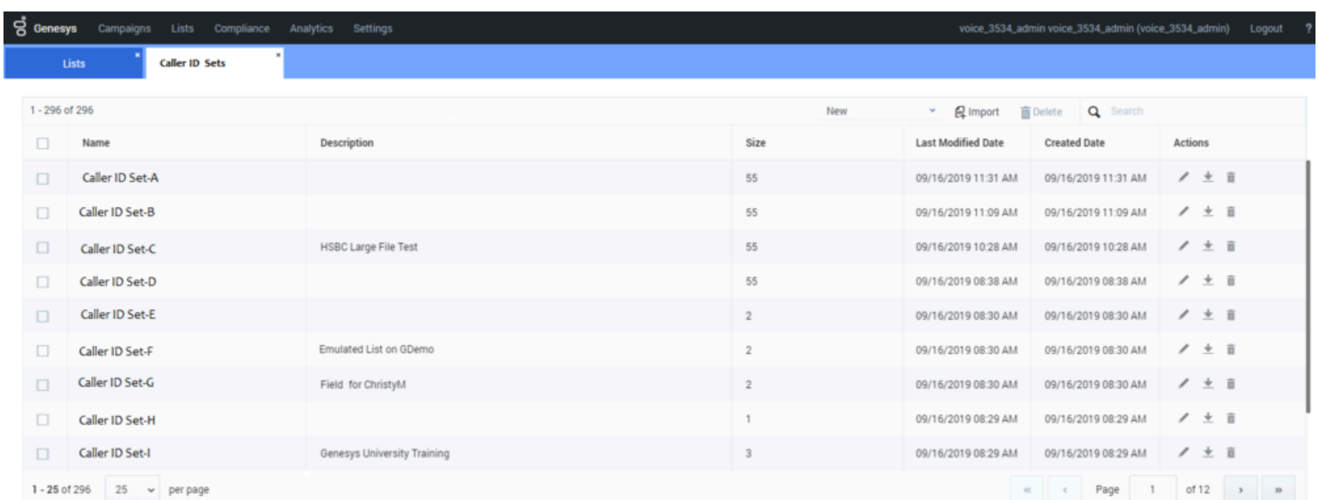
When an Outbound Campaign Group includes a Caller ID Set, the Outbound Contact Server (OCS) selects (sequentially or randomly) a different Caller ID each time a specific outbound phone number is contacted. As a result, the same outbound phone number will see a different Caller ID every time he/she receives a call from the same Outbound Campaign.

Each Caller ID value represents a phone number (a string of digits with an optional **+** sign).

Caller ID Sets Table View

To view the **Caller ID Sets** table view click **Campaigns > Caller ID Sets**.

The following image represents a typical Caller ID Sets view.

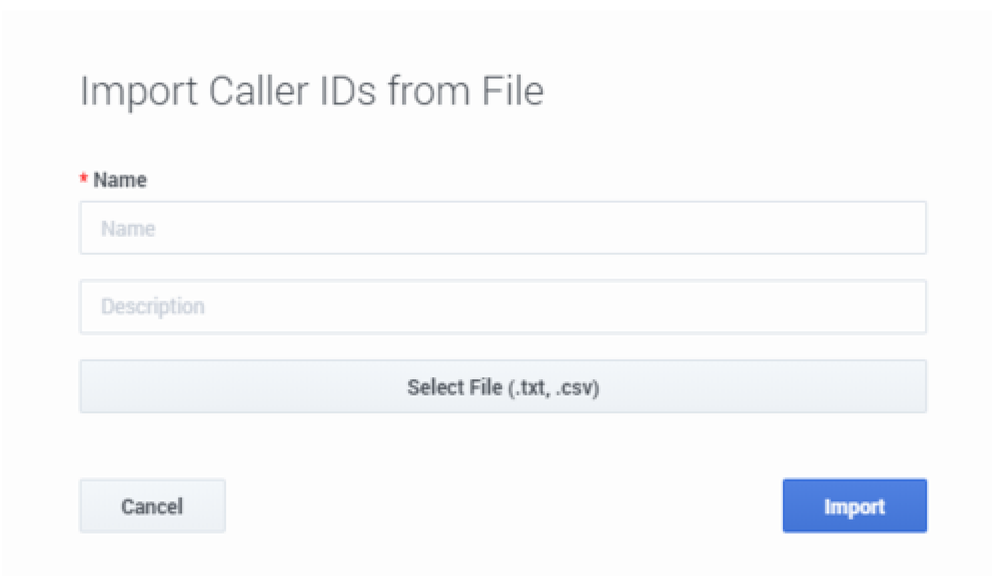


The following table describes the Caller ID Sets options.

Type of Information	Description
New	Enables you to create a new Caller ID Set.
Import	Enables you to import a Caller ID Set. See Import Caller ID Set
Delete	Enables you to delete the selected Caller ID Set(s).
Search	Enables you to search for a specific Caller ID Set.
Name	The Caller ID Set name.
Description	An arbitrary representation of the Caller ID Set.
Size	The number of Caller IDs in the specific Caller ID Set.
Actions	• Edit • Download (disabled) • Delete

Import Caller IDs from a File

1. Click **Campaigns > Caller ID Sets** and click **Import**.



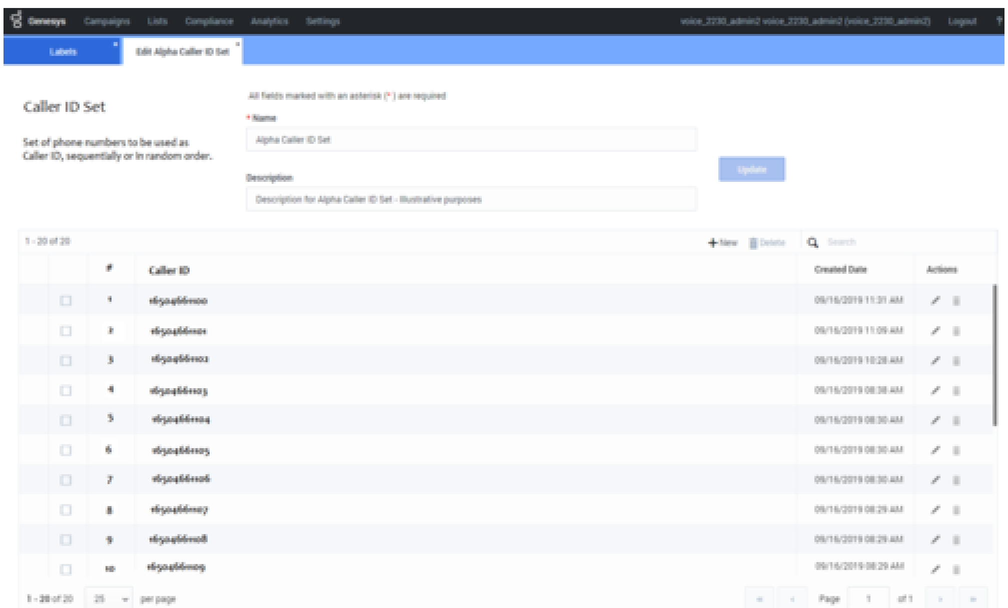
2. In the fields provided enter a Caller ID Set name and description.
3. Click **Select File (*.txt, .csv) and browse to the location of the file.**
4. After you select the *.txt or *CSV file click **OK** and then **Import**. The imported Caller ID(s) are now a

part of a specific Caller ID set that will automatically appear in the Caller ID Sets view with the name given in the second step.

> **Important**
> A single input file cannot contain more than 5000 Caller ID Sets.

Create / Edit a Caller ID Set

1. Click **Campaigns > Caller ID Sets**.
2. From the list provided click the name of the Caller ID Set you want to edit or click **+New** to create a new Caller ID Set.



3. In the fields provided configure the Caller ID Set name and description.
4. From the list provided select one or more Caller IDs.
5. Click **Update**. The new / edited Caller ID Set automatically appears in the Caller ID Sets view.

The following table describes the options available when creating/editing a Caller ID Set.

Type of Information	Description
New	Enables you to create a new Caller ID. When you click **+New** enter a Caller ID in the field provided and click **Save**. The new Caller ID is added to the Caller ID Set you are creating / editing.

Type of Information	Description
	Note: A Caller ID can only include numbers and an optional plus character **+** at the beginning of the number.
#	A sequential order value based on the Caller ID creation date/time.
Caller ID	Indicates the Caller ID value. This column is sorted by the Created Date column.
Created Date	Indicates the date and time at which the Caller ID was added to the Caller ID Set.

Assign a Caller ID Set

To assign a Caller ID Set to a Voice Dialing Profile, Campaign Template and/or Campaign Group:

1. Create / Edit a Dialing Profile, Campaign Template and/or Campaign Group.
2. In the **General** tab turn on the **Caller ID Set** switch option.
3. Click **Change** and in the dialog window that appears select the Caller ID Set order.
4. Select one of the Caller ID Sets from the list provided.
5. Click **Save**. The selected Caller ID Set(s) appear next to the Change button.

Define the Calling Window (Time Constraints)

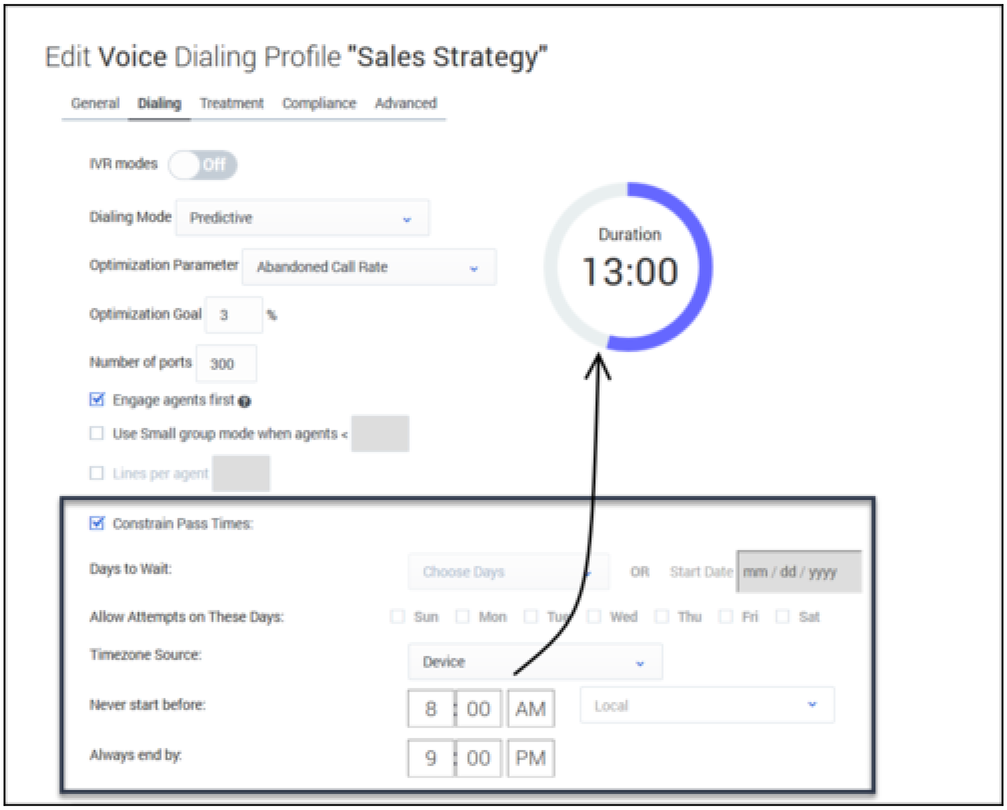
> **Important**
> The content of this document has been moved and is no longer being updated in this location.
> For the latest content and most recent updates, see the CX Contact Help on the Genesys Multicloud site.

You can use **Time Constraint** options to define an acceptable calling window.

This article describes the available time constraint options, and it explains how to enable a safe dialing window.

Set Time Constraint Options

To set the **Time Constraint** options, go to the **Dialing** tab for the campaign object and check **Constrain Pass Times**.



Now select from the following options:

- Days to Wait - Reserved for future use.
- Allow attempts on these days - Reserved for future use.
- Timezone Source - This defines how CX Contact assigns a timezone to the record. The options are listed in the table below.
- Never start before/Always end by - Specify the earliest possible start time and end time that the system can dial records.

When you define **Never start before** and **Always end by** options, a doughnut chart appears onscreen to display the campaign duration. The doughnut represents a 24-hour window, and the time is formatted as HH:MM.

The **Timezone Source** options are described below.

Timezone Source	Description
Device (Default)	CX Contact uses the device's country code and area code to determine the time zone.
Contact	CX Contact uses the postal code value provided in the customer record.

Timezone Source	Description
Contact then Device	CX Contact uses the postal code value. If none is provided, it refers to the Device field.
Contact and Device	The system compares the device's area code and the contact's time zone provided in the record. If there is a time zone mismatch between the two pieces of information, the record will only be dialed during a 'safe' window – meaning the system doesn't start to attempt records until the latest time zone window opens and the system stops all attempts when the earliest time zone window closes. To define this calling window, you must set the Time Constraint options on the Dialing tab for a campaign group to the hours that fall within this safe dialing window and you must use the local time zone option.
Explicit	If you select **Explicit**, you can specify a time zone in the **Choose Timezone** menu in the **Time Constraints** section of the **Dialing** tab. When you do this, the system applies that time zone to all records in the contact list and ignores all **Contact** and **Device** time zone assignments. Important We do not recommend this option if your contact list contains international numbers or countries with multiple time zones.

Set a Safe Dialing Window

If a record within a contact list contains more than one time zone (for example a phone number in the Canada Atlantic time zone and a postal code in the US/Pacific time zone), CX Contact can determine the safest dialing window for that record. A safe dialing window simply means that the system waits until the latest time zone window opens before it starts to attempt records, and it stops attempting records when the earliest time zone window closes.

Example	**Scenario**: • A record contains an Canada Atlantic (AST) time zone area code and a US/Pacific (PST) postal code. • The Constrain Pass Times option is enabled. • Timezone Source is set to Contact and Device. • The Never start passes before option is set to 8 AM local time. • The Never end passes by option is set to 9 PM

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<tr>
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local time.

Result:

The system starts attempting the record at 8 AM PST, which is 12 PM AST.
The system stops all attempts at 9 PM AST, which is 5 PM PST.

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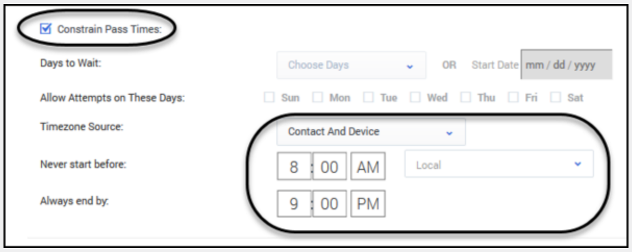
<tr>
<td>How to enable</td>
<td>

Enable (check) Constrain Pass Times (this is enabled by default)
From the Timezone Source menu, select Contact and Device.
Specify the calling window:

Never start before - This is the time that the system begins attempting records.
Always end by - This is the time that the system stops attempting records.



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Related Topics

- Dialing Modes and IVR Modes

Apply Treatments

> **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.

A treatment defines what CX Contact should do with a call that does not reach the intended party.

On the **Treatment** tab for a dialing profile, campaign template, or campaign group, Treatments are broken down into the following sub-tabs:

- Delivery Options - Define the circumstances in which the system should connect a call to an agent. (Applicable to the voice channel only.)
- Retry Options - Define how the system should respond to any given delivery result or disposition code.
- Device Escalation - If a single record contains more than one device, use this feature to identify which device(s) are contacted as well as the order in which they are contacted.
- SCXML Treatments - Specify a URI to a stored SCXML treatment script. When you do this, the system applies all treatment configuration defined in the script and ignores all treatment configuration previously defined in CX Contact.

Delivery and Retry Options

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 Delivery and Retry options to define how the system should handle a call in any given scenario. More specifically:

- Use Delivery options to define the circumstances in which the system either connects the call to an agent or drops the call (available for the voice channel only).
- Use Retry options to tell the system how to respond to a particular delivery result or disposition code.

This article describes all Delivery and Retry options. It focuses heavily on Retry options and provides detailed instructions on how to define a treatment plan. If you're looking for information about device escalation, go here. For information about SCXML-based treatments, go here.

Delivery Options

Use the **Delivery Options** tab to define the circumstances in which the system connects a call to an agent.

By default, the **Deliver to Live Person** option is enabled and cannot be disabled. When the system detects a voice on the line, it connects the call to an agent.

Click **Advanced** to see more delivery options. By default, the system drops the call if it detects an answering machine, fax machine, or silence. When you enable any of these options, the system connects the call to an agent within the agent group. Optionally, you can change the default destination DN if you want to connect the call to a different routing point.

Retry Options

Use the **Retry Options** tab to define the way in which the system retries contact attempts based on either a delivery result or a disposition code. For example, you could specify the following:

- If the delivery result is Busy
- Wait 30 minutes (Interval)
- Then redial the number (Apply to Record action)
- Every 5 minutes (Increment)
- Up to a maximum of 3 times (Retry Count)
- Then move to the next record in the chain and apply the same treatment (Next Action)

This section describes how to create a treatment plan like the one outlined above.

The first part defines the following key menu options:

- Retry options
- Apply to Record actions
- Next Action options

Then, you'll learn how to define a treatment based on either a delivery resultor a disposition code.

Retry Options (Treatment Properties) Defined

The following table defines all available **Retry** options.

Retry Option	Description
Delivery Result	Used when the treatment plan is based on the result of a contact attempt (a voice call or a text). See the Treatments based on Call/Delivery Results for more information.
Disposition Code (Applies to the voice channel only)	Used when the treatment plan is based on disposition codes. See Treatments based on Disposition Codes for more information.
Apply to Record	Defines the action the system takes in response to a given delivery result or disposition code. See the Apply to Record Options section for a description of each option.
Retry Count	The maximum number of consecutive attempts to retry a record.
Interval	The time (measured in DD:HH:MM) that the system waits between the first contact attempt and the first **Apply to Record** attempt.
Increment	The number of minutes added to the previous redial time interval.
Date/Time	Required when you select **Retry at a specified date** or **Next in chain at specified date** from the **Apply to Record** menu.
List	Required for the **Suppress** and **Copy Contact** actions. For the Suppress action all suppression lists stored in CX Contact with an expiration date

Retry Option	Description
	set to **Never**, regardless of type (Client ID or Device), populate in this menu. For Copy Contact all contact lists stored in CX Contact populate in this menu.
More	Enables you to configure extended parameters of the **Retry** action. Currently this is only enabled for the Copy Contact action.
Next Action	Defines the way in which the system moves through a batch of chained records after the **Apply to Record** action has been completed. See the Next Actions section for more information.

Apply to Record Options Defined

Apply to Record defines the action that results from a given delivery result, delivery result, or disposition code. In the example statement *If the delivery result is Busy, redial the number*, the **Apply to Record** action is **Redial**.

The options are as follows:

- Redial - Redials the number.
- Retry in - Retries once according to the values specified in the **Retry Count** and **Interval** fields (for example, retry once in 60 minutes).
- Retry at specified date - Redials the record on the date specified in the **Date** field.
- No Treatment - Does not apply a treatment.
- Suppress - Adds the record to the suppression list specified in the **List** menu.
- Copy Contact - Copies the contact from the current contact list to a target contact list. There are three types of Copy functions:
    - Copy as General (or as new) - Creates a new General record in the target contact list with immediate availability.
    - Copy as Rescheduled - Creates a new Rescheduled record in the Target Contact list that will be processed after a specific delay (for example, 2 hours).
    - Copy as Callback - Maintains the callback information (that is, agent name, the date and time the callback occurred, and the type of callback) when a contact is copied to a new contact list. To refine the Copy as Callback option you must configure the following three settings:
        - Force Campaign Callback – Set to **On** to indicate that the Copy Contact option will always be a Campaign Callback regardless of the original contact type.
        - Copy type – Select **Append** or **Append and Update**. For details, see the Edit a list section.
        - Target Campaign Group – Select the campaign group that you want to target.
- AssignToGroup - Redistributes the callback to another agent in the agent group if the original agent is unable to initiate the scheduled callback.

> **Important**
>
> - The AssignToGroup option is only available when the call result is: agent callback error.
> - The **Retry** options available to you depend on the **Apply to Record** option you selected. This table illustrates the available **Retry** options for each **Apply to Record** action.

Apply to Record Options	Retry Count	Interval	Increment	Date/Time	List
Redial	●	●	●		
Retry in		●			
Retry at specified date				●	
No treatment					
Suppress					●
Copy Contact		●			●
AssignToGroup					

Next Action Options Defined

Use the **Next Action** options to define how the system should move through a batch of chained records based on a given delivery result, or disposition code. The options are as follows:

> **Important**
>
> A **Next** action is not mandatory. If it is not required you do not have to select a Next option.

Next Action	Description
Next in chain	The system immediately attempts the next record in the chain (that is, the next device for the given contact).
Next in chain after	The system waits until the time specified in the **Interval** field before attempting the next record in the chain (that is, the next device for the given contact).
Next in chain at specified date	The system waits until the date and time specified in the **Date/Time** field before attempting the next record in the chain (that is, the next device for the given contact).
Update all records in chain	The system updates all chained records with the delivery results. It does not proceed with any of the next-in-chain actions.
Suppress then Next in chain	Once a record has been added to target suppression list, the system immediately attempts the next record in the chain (that is, the next device for the given suppression list).
Suppress then Next in chain after	Once a record has been added to target suppression list, the system waits until the time specified in the **Interval** field before attempting the next record in the chain (that is, the next device for the given suppression list).
Suppress then Next in chain at specified date	Once a record has been added to target suppression list, the system waits until the date and time specified in the **Date/Time** field before attempting the next record in the chain (that is, the next device for the given suppression list).
Copy Contact	The system copies the contact from the current Contact list to a target contact list. There are two types of Copy functions (Copy as General (or as new) and Copy as Rescheduled).

The table below illustrates the mandatory **Retry** options for each **Next Actions** option:

Next Action	Retry Count	Interval	Increment	Date/Time	List
Next in chain					
Next in chain after		●			
Next in chain at specified date				●	
Update all records in chain					

Next Action	Retry Count	Interval	Increment	Date/Time	List
Suppress then Next in chain					●
Suppress then Next in chain after		●			●
Suppress then Next in chain at specified date				●	●
Copy Contact		●			●
AssignToGroup					

<table>
<tr>
<td>Example</td>
<td>

Delivery Result: No Answer
Apply to Record: Redial
Retry Count: 2
Interval: 00:00:30
Increment: 10 min
Next Action: Next in chain

With a chain of three records, the behavior is as follows:
The system attempts the first record in the chain. There is no answer.

Retry 1: The system retries the record 30 minutes later. There is no answer.
Retry 2: The system retries the record after 30 minutes plus the additional 10-minute increment. There is no answer.

The system dials the second record in the chain. There is no answer.

Retry 1: The system retries the record 30 minutes later. There is no answer.
Retry 2: The system retries the record after 30 minutes plus the additional 10-minute increment. There is no answer.

The system attempts the third record in the chain. There is no answer.

Retry 1: The system retries the record 30 minutes later. There is no answer.

</td>
</tr>
</table>

	• Retry 2: The system retries the record after 30 minutes plus the additional 10-minute increment. There is no answer. The records are updated in the contact list and the system stops processing the chain.

Important

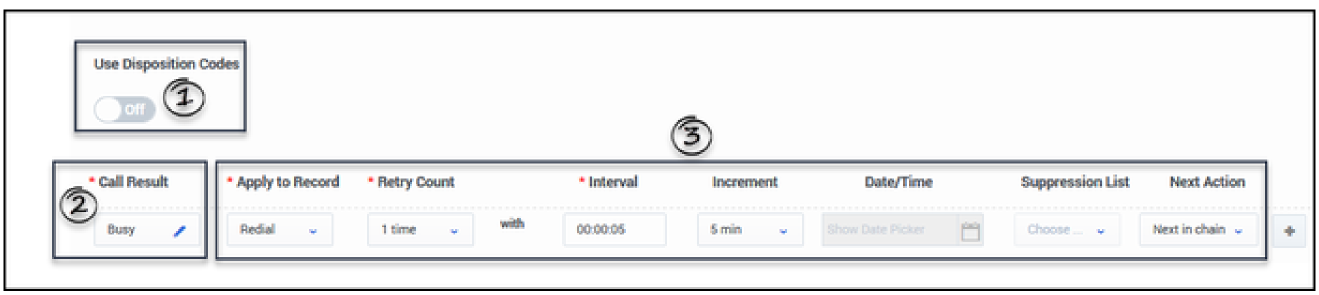
Notes about **Next Actions**:

- When a chain ends, it is updated in the contact list and the system stops processing that chain.
- The **Interval** and **Increment** options are not applicable to the **Next in chain at specified date** action.
- If a record within a chain is suppressed, CX Contact continues to move through the chain according to the option specified in the **Next Action** menu.

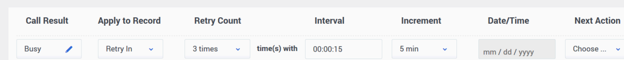
Treatments based on Delivery Results

To define a treatment based on delivery results:

1. Leave the **Use Disposition Codes** switch set to the **Off** position.
2. Select one or more delivery results for the treatment (for example **Busy**),
3. Go through the Retry Options to define the treatment.



Example	For Busy delivery results, you want the system to do the following: • Wait 15 minutes before retrying the record • Retry the record a maximum of 3 times

	• Wait 5 minutes between each retry To achieve these results, specify the following: • Delivery Result: Busy • Apply to Record: Retry In • Retry Count: 3 times • Interval: 00:00:15 • Increment: 5 min (The **Date/Time** and **Next Action** fields are not required. Refer to the Next Actions section for an example using a **Next in chain** action.) 

Description of Delivery Results

The following table describes all possible delivery results.

[+] Click for a description of delivery result values

Delivery Result Value	Description
Unknown	
Abandoned	The call was dropped and will not be redialed.
Agent Callback Error	The system generates this delivery result when a call record is rescheduled according to a personal callback request from the desktop application, but the system cannot find the designated agent to receive the callback when the scheduled time arrives.
All Trunks Busy	There are no free trunks on the switch.
Answer	The customer was reached at the dialed phone number.
Answering Machine	An answering machine was detected at the dialed phone number.
Bridged	Reserved for future use.
Busy	The phone number was busy.
Call Drop Error	Reserved for future use.
Cancel Record	The record has been marked with Cancel by the agent desktop application or a third-party application.
Cleared	Reserved for future use.
Conferenced	Reserved for future use.
Consult	Reserved for future use.

Delivery Result Value	Description
Converse-On	Reserved for future use.
Covered	Reserved for future use.
Deafened	Reserved for future use.
Dial Error	There was a hardware error.
Do Not Call	The record has been marked with **DoNotCall** by the agent desktop application or a third-party application.
Dropped	The call was dropped by the dialer after the call was dialed.
Dropped on No Answer	Reserved for future use.
Fax Detected	A fax machine was detected.
Forwarded	Reserved for future use.
General Error	A general error occurs when a call is not completed, possibly caused by an invalid telephone number in the record or a wrong number.
Held	Reserved for future use.
No Answer	There was a ring without an answer.
No Dial Tone	Absence of dial tone based on an error returned by the Dialogic board or the call progress detection (CPD) board on the switch.
No Established	Reserved for future use.
No Free Port Error	No port is available to place call.
No Progress	Call progress detection either did not start or has been terminated due to a Dialogic hardware or CPD Server configuration error.
No Ring Back	Reserved for future use.
NU Tone	A special Public Switched Telephone Network (PSTN) code valid only in Europe.
OK	The system treats OK as undefined and disregards any treatments created for this delivery result.
Overflowed	Reserved for future use.
Pager Detected	A pager was reached at the dialed phone number.
Picked Up	Reserved for future use.
Queue Full	Reserved for future use.
Redirected	Reserved for future use.
RemoteRelease	Reserved for future use.
Silence	The call was dialed, but there was no call progress detection (CPD).
SIT Detected	Any type of network tone.
SIT Oper Intercept	Only applies if the network supports this specific standard information tone (SIT). Check with the switch vendor for confirmation.

Delivery Result Value	Description
SIT Invalid Number	Only applies if the network supports this specific SIT. Check with the switch vendor for confirmation.
SIT No Circuit	Only applies if the network supports this specific SIT. Check with the switch vendor for confirmation.
SIT Reorder	Only applies if the network supports this specific SIT. Check with the switch vendor for confirmation.
SIT Unknown	Only applies if the network supports this specific SIT. Check with the switch vendor for confirmation.
SIT VC (Vacant Code)	Only applies if the network supports this specific SIT. Check with the switch vendor for confirmation.
Stale	The call result is marked as stale if the following timer has expired: stale_clean_timeout the system will also mark the call result as stale for call records that have not received a RecordProcessed request from the desktop application when a dialing session/campaign group is being unloaded.
Switch Error	No dial tone was received.
System Error	A dialing software error.
Transfer Error	The system has a problem transferring calls based on the call action.
Transferred	Reserved for future use.
Wrong Number	The call is answered but the desired person(s) could not be reached; this call result is sent by the agent desktop application and not detected by the dialer.
Wrong Party	The call is answered by a wrong party; this call result is sent by the desktop application and not detected by the dialer.

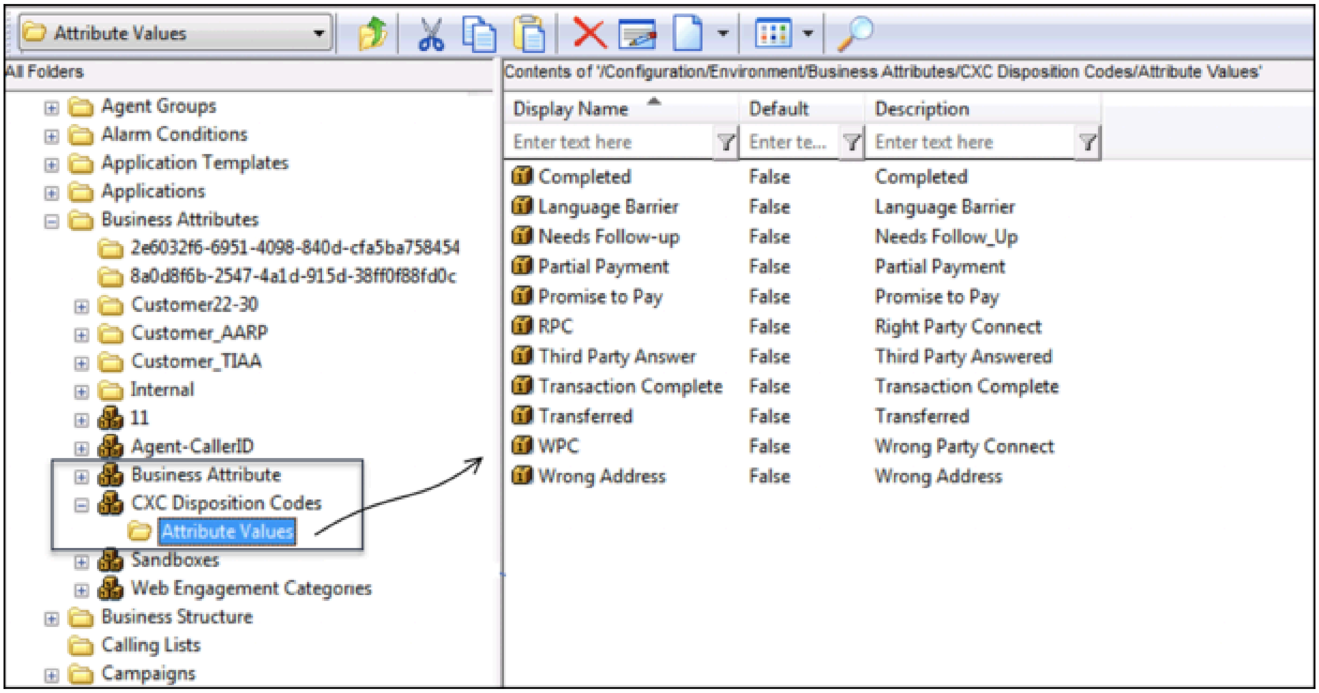
Treatments based on Disposition Codes

Important
This option applies to the voice channel only

.

To create disposition-level treatments:

First, create a business attribute in the Configuration Manager section of the configuration environment (Platform Administration or Genesys Administrator Extension). In the **Business Attribute Values** folder, create the list of disposition codes that you want to populate in CX Contact when you define the treatment.

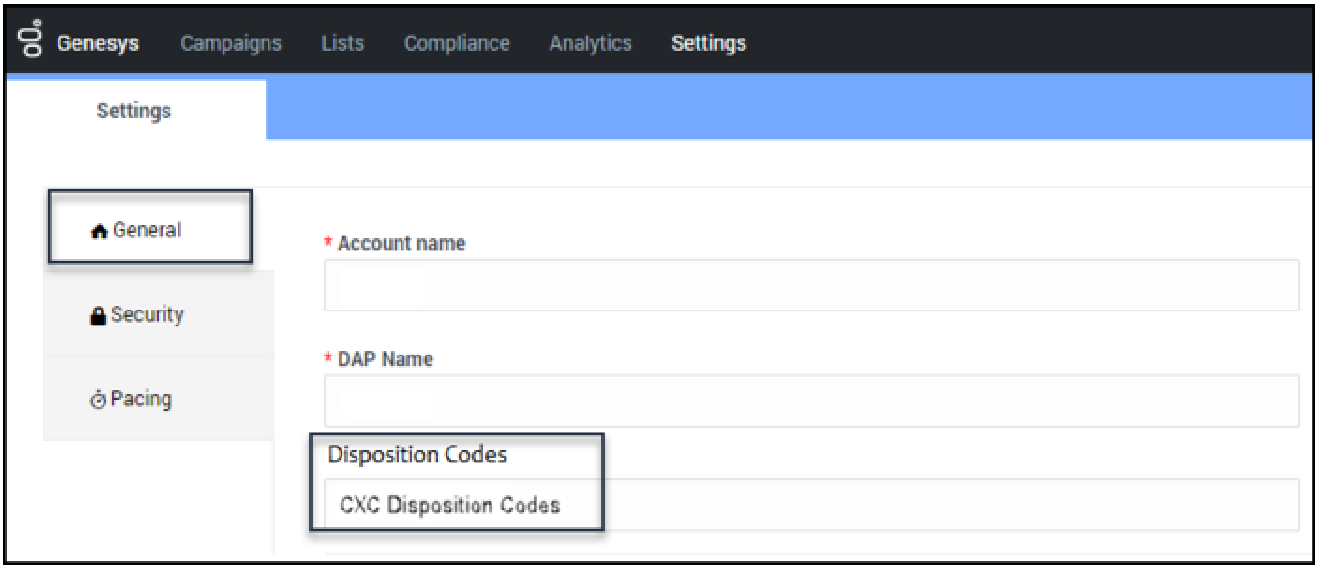


For more information about business attributes, refer to the Business Attributes page in the *Platform Administration* guide (for cloud) or the Business Attributes page in the *Genesys Administrator Extension Help* guide (for premise).

Next, in CX Contact, go to the **Settings** page, and in the **Disposition Codes** field on the **General** tab, specify the display name of the business attribute that stores the disposition codes (Business Attribute Values). In the screenshot below, notice that the value in the **Disposition Code** field (CXC Disposition Codes) matches the display name of the business attribute (**CXC Disposition Codes**) in the screenshot above.

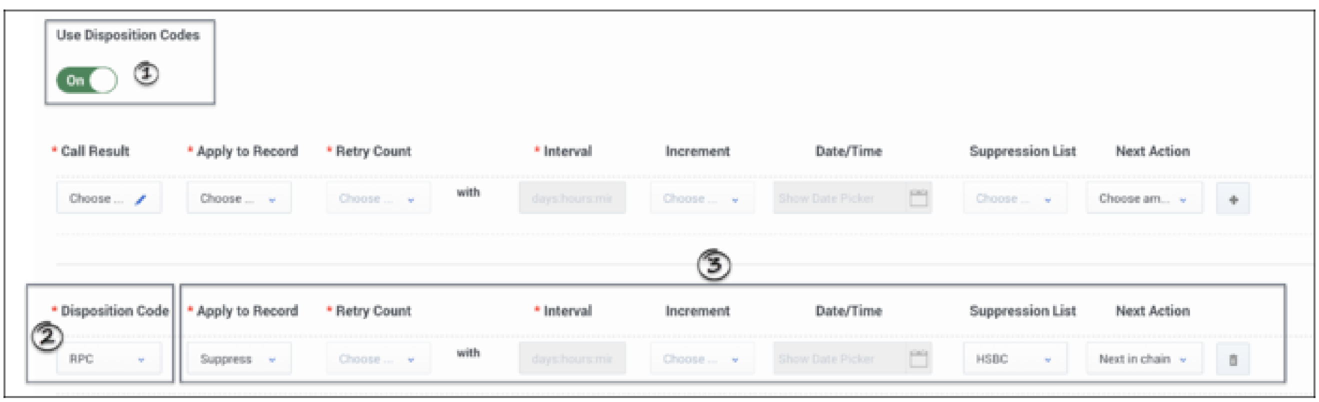
Important

When you create a business attribute, you specify a *name* and a *display name* for it. Always reference the *display name* in CX Contact.



Then, in CX Contact, go to the **Retry Options** tab and do the following:

1. Set the **Use Disposition Codes** switch to the '**On'** position.
2. Select one or more disposition codes from the **Disposition Code** menu.
3. Go through the Retry Options to define the treatment.



Important

If a treatment is defined for both a delivery result and a disposition code, CX Contact gives priority to the disposition code when applying the call treatment.

Device Escalation

> **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.

In the event records within a contact list contain multiple devices, you can use the **Device Escalation** feature to specify which device(s) in the record you want the system to dial. If you want the system to dial more than one device, you can define the order in which the devices are dialed. For voice campaigns, you can also specify how to handle answering machine detection - drop the call, deliver the call to an agent, or send the call to a DN for treatment (for example, leave a pre-recorded message).

This article describes the **Device Escalation** sub-tab of the **Treatment** tab. For information on the **Delivery Options** sub-tab or the **Retry Options** sub-tab, go here. For information about applying SCXML treatment scripts, go here.

Enable Device Escalation

To get started, go to the **Treatment** tab to see all available treatment sub-tabs - **Delivery Options**, **Retry Options**, **Device Escalation** and **Summary**.

The **Device Escalation** sub-tab is initially disabled (greyed out). To enable it, set the **Use Device Escalation** switch to the **On** position.

Now you can click the **Device Escalation** sub-tab to define the device escalation plan.

By default, all 10 devices are enabled and are prioritized/ordered from Device 1 to Device 10. Each device can be enabled or disabled.

The fields on the **Device Escalation** tab are as follows:

Important

Before **Device Priority** configuration can take effect, the Next in chain or Next in chain after option must be enabled for call results on the **Retry Options** tab.

- Enable Device - **On** means the device is attempted and included in the escalation plan. **Off** means it is excluded.
- Device Priority and Device to Contact - These fields define the priority of a device being attempted. For example, if you want Device 3 to be attempted first (i.e. before all other devices in the escalation plan), drag and drop **Device3** to align with the 1st **Device Priority** field. See the Prioritize Contact Order example below for more information.
- Answering Machine (enabled for the voice channel only) - Define how you want the system to respond if

it detects an answering machine. See the section on Handling Answering Machine Detection below for more information.

Handle Answering Machine Detection

Important

This field applies only to campaigns using the voice channel.

The system can handle answering machine detection in a couple of ways:

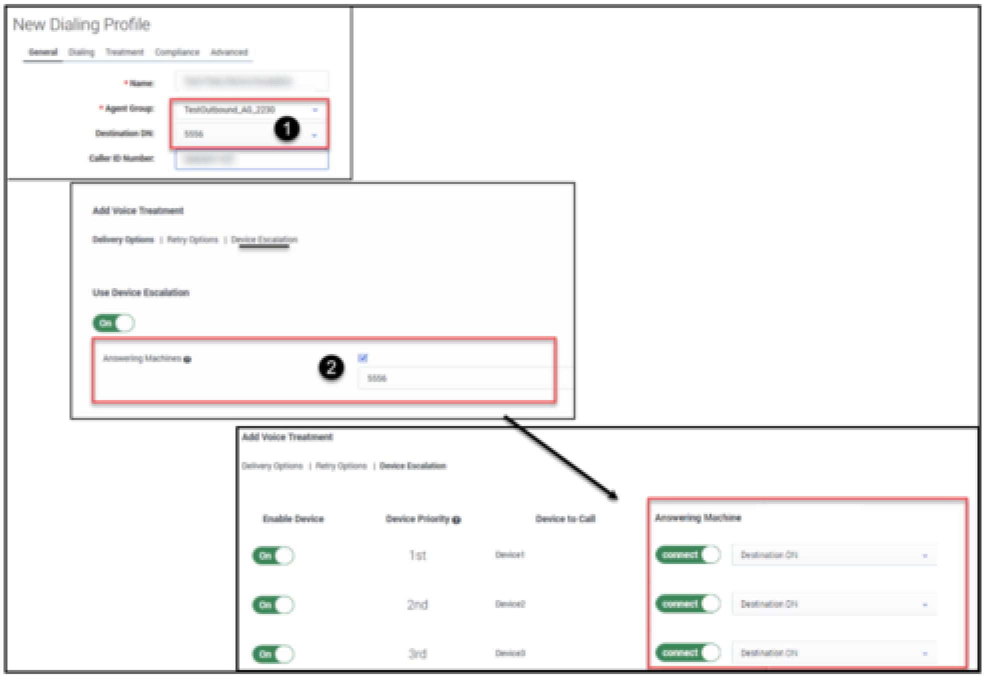
- Drop the call
- Deliver to a DN - to either an agent group or to a DN where a pre-recorded message is played.

If you opt for the second option, you must first do the following:

1. On the **General** tab for the campaign object, specify an **Agent Group** and **Destination DN**.
2. On the **Treatment -> Delivery Options** tab, set the switch to **connect** to enable the correct behavior for the Answering Machine. The DN or DN's associated with the agent group specified on the **General** tab populate the **DN** field drop down menu.

Important

If you edit the default Destination DN on this tab, the change will apply to all devices because all devices must use the same Destination DN.



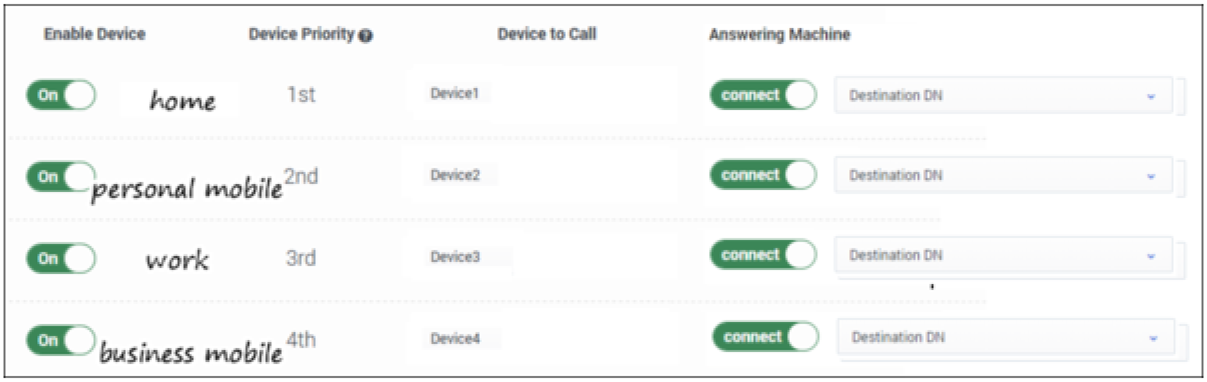
> **Important**
> If you do not follow the steps above, your only option is to drop the call upon answering machine detection.

Device Escalation Business Scenario

The best way to understand how this feature works is to read the scenario below and then apply the principles and plan to your own scenario.

To begin, let's say there are four devices for a record:

- Device 1 is home
- Device 2 is personal mobile
- Device 3 is work
- Device 4 is business mobile



You should now formulate a plan. In this scenario, you should start by determining which devices you want to target, then prioritize the order in which those devices are contacted, and then determine what you want to do if the system detects an answering machine on any given device.

Target Devices

Plan: You're calling at a time when contacts are unlikely to answer their home phone or their work phone - say at lunch time on a weekday - so you want to target mobile devices only. In this case, that's Device 2 (personal mobile) and Device 4 (business mobile).

Action: For Device 2 (personal mobile) and Device 4 (business mobile), leave the **Enable Device** switches set to the **On** position. For all other devices, turn the **Enable Device** switch to the **Off** position.

Prioritize Contact Order

Plan: Notice in the **Device to Contact** field that Device 2 (personal mobile) is placed in the 2nd priority position, while Device 4 (business mobile) is placed in the 4th priority position. That means the system will call the personal mobile phone before calling the business mobile. Let's say you want the reverse to happen - you want to start with Device 4 (business mobile) before proceeding to Device 2 (personal mobile).

Action: To reverse the order:

1. Drag Device2 (personal mobile) from the 2nd priority position to the 4th priority position. This moves

Device4 to the 3rd priority position because a device that is displaced from its original position moves up or down one position - it does not switch places with the device moving into its position.

2. Drag Device4 (business mobile) from the 3rd priority position to the 2nd priority position.

Link to video

Handle Answering Machine Detection

> **Important**
> Remember, this option only applies to campaigns using the voice channel.

Plan: If an answering machine is detected on Device 2 (personal mobile), you want an agent to take the call and leave a voicemail. If an answering machine is detected on Device 4 (business mobile), you want the system to hang up.

Action: In the **Answering Machine** field, select the following:

- Device 4 (Business mobile) - Enable the **Drop** option.
- Device 2 (Personal mobile) - Leave the **Connect** option enabled (checked).

SCXML-based Treatments

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.

If you've created an SCXML treatment script and want to apply those treatment parameters to a dialing session, you can specify the URI to the SCXML treatment script in CX Contact. CX Contact navigates to the specified server or remote directory and stores the file internally. When you use this option, the system applies all treatment parameters defined in the SCXML treatment script and ignores all treatment parameters previously defined in CX Contact.

To specify the URI to an SCXML treatment script:

1. Select the **Treatment** tab for the dialing profile, campaign template, or campaign group.
2. Move the **Scripting treatments** switch to the **On** position.
3. Specify the URI address.

Valid URI formats are as follows:

- http://hostname/[directory]/script-name.scxml
- file://host/path/script-name.scxml

Lists

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 this section of the user interface to create and manage contact lists.

Link to video

What do you want to do?

[+] Lists

- Learn about supported file formats
- Learn about the fields and field labels in a contact list
- Learn about contact list database tables
- Import a contact list
- View import activity
- Export a contact list
- Apply phone number filters
- Define list weighting
- Edit a contact list
- Delete a contact list
- Create a data mapping schema
- Add contacts to a contact list
- Permanently remove contacts from a contact list

[+] List Rules

- Create an upload rule

- Create a selection rule
- Create a filtering rule
- Edit a list rule
- Delete a list rule
- Duplicate a list rule

[+] List Automation

- Create a List Automation job
- Schedule a run
- Learn about supported FTP address formats
- Create List Automation rules
- View job details

[+] Specification Files

- Import specification files

[+] Contact Search

- Search for a contact

Contact List Formats, Fields, and Tables

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.

Contact lists are used to store and organize contact information. Once you import a contact list into CX Contact, you can use it for one or multiple campaign groups.

On the Lists page, you will learn how to work with contact lists, but first it's important to understand the basics:

- Supported file formats
- View a Contact list
- Contact list fields
- Contact list database tables

Supported File Formats

CX Contact supports the following file formats for contact lists and suppression lists:

CSV	The easiest text file format for importing contact information is comma separated value (CSV). In a CSV file, each record is on its own row, and each field within a record is delimited, or separated, with commas. **Important:** We recommend you use a header record, the first row of the list, which names and describes the data fields. The header row is used to govern the mapping between the fields in the data file and the fields in the contact list.
TXT	You can import a contact list in a text file format, including any of the following: • Pipe-delimited files

	• Colon-delimited files • Tab-delimited files • Semicolon-delimited files • Fixed position files, containing values in specified columns (such as a 10-digit phone number starting from character offset 105 through to 114).
XLS	Microsoft Excel files are supported.
XLSX	Microsoft Excel Open XML Format Spreadsheet files are supported.

Tip

To avoid problems with mapping, we recommend you use an input specification file or the data mapping feature when importing your files.

View a Contact List

When you go to the **Lists** menu and select the **Lists** page, you'll see a list of all available contact lists and their associated details, as follows:

Name	The name of the list.
Description	A description of the list.
Caller ID	The caller's phone number.
Label	Indicates the purpose of the list.
Size	The number of records in the list.
Secured	Indicates if the Contact list was PGP encoded before it was imported/exported.
Last Modified Date	The date and time the list was last changed.
Created Date	The date and time the list was created.

If you want to view the details of an individual contact list, click the box next to its name and select the **Edit List** icon from the **Actions** menu.

Contact List Fields

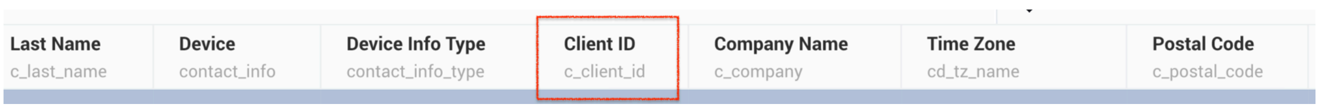
A contact list can contain any or all of the fields described in this section. While the Device field (at least one) is the only mandatory field, Genesys recommends you also include a Client ID field. Otherwise, that field will be auto-filled with the Device information (phone number, for example).

Contact List Import

When you import a list into CX Contact, it can contain any or all of the fields listed in the table below.

Important

- When working in the List Details View, the DB field name of every Contact List field is located under its respective column header. When working with SQL use the DB field name to query the correct DB fields. For example, in the following image you can see that contact list field for Client ID is c_client_id.
- To hide a column from the List Details View, right click the column heading and select **Hide** from the menu that appears. Click **Unhide** to unhide all of the hidden columns.



Type of Information	Description
General	• FirstName— 64 characters maximum • LastName—64 characters maximum • Company—64 characters maximum • Client Identifier—64 characters maximum. • Time Zone - Java formatted time zone (for example, Europe/London) • Postal Code - 32 characters maximum • Country Code - 3 characters • State/Region - 2 characters • Original Record - Reserved for future use Important If the data in any of your Other or General fields contains commas, those fields must be enclosed in double quotation marks.
Other (User-defined Fields)	Other1 to OtherN are user-defined fields, meaning

Type of Information	Description
	you use them to specify free-form information about the contact. The character limit for these fields is 1,024. By default, these fields are labelled as Other1, Other2, Other3, and so on, but you can override the default labels to clearly identify what the field is used for. Refer to the Create or Manage Field Labels page for more information.
Device	Device1 - Device10 fields are used to store the contact's phone number. Phone numbers can be entered using the following format: • International (the phone number being dialed is outside the country of the *account*) - **+** followed by the country code, followed by the area code and phone number • National (the phone number being dialed is within the same country as the *account*) - the area code and phone number. However, it's safe to use the country code in all circumstances. Click to see examples. Important When a file is imported, all phone numbers, regardless of format, are normalized to E.164 standards (i.e. + followed by country code).

Contact List Export

When you export a contact list from CX Contact, the list can contain any of the fields listed in the table above, in addition to the fields listed in the table below.

Field Name	Type
Agent ID	String
Application DBID	Integer
Number of Attempts	Integer
ISO country Code (Contact)	String
Original Record	String
Postal Code	String
State/Region Code	String
Time Zone DBID (Contact)	Integer
Time Zone Name (Contact)	String
Call Result	Enum
Call Time	Integer, UNIX Epoch
Campaign DBID	Integer
Area Code	Integer

Field Name	Type
Country Code (Device)	String
ISO Country Code (Device)	String
Device Index	Integer
Device Type	Integer
Device Exchange	Integer
Device Extension	Integer
Device Mask	Decimal integer
Device Number	Integer
State/Region Code (Device)	String
Timezone DBID (Device)	Integer
Time Zone Name (Device)	String
Chain ID	Integer
Number in Chain	Integer
Contact Info (Device)	String
Contact Info Type	Enum
Contact From	Integer
Contact Till	Integer
Scheduled Time	Integer, UNIX Epoch
Group DBID	Integer
Record ID	Integer
Record Status	Enum
Record Type	Enum
Switch DBID	Integer
Treatment History	String
Time Zone DBID	Integer

Contact List Database Tables

When contact list data is imported into CX Contact, the data is stored in a database table. In CX Contact, there are two distinct database tables: the *main* table and the *secondary* table. There are distinct differences between the two:

Main	• Stores all General, Device, and Other1-Other20 data • Contains one record for each device within a chain

	• All fields in this table can be modified Important Use these fields for any data that will be part of a dialing filter or contact order, or for data that will be edited by an agent.
Secondary	• Stores all Other21-OtherN data • Each record is tied to a Chain ID in the main table. Records are not separated by devices. • All user-defined (Other21-OtherN) data is presented within the same row as all other data. • There is one record for each user-defined (Other) field. For example, if for one particular Chain ID, there are three user-defined fields containing user data (for example Other21, Other22, Other23), there will be three separate records for this one Chain ID. • User-defined data (Other 21 and onward) cannot be modified. **Important**: Genesys recommends you use fields Other1-Other20 (the *main* table) for data that might need to be modified later.

Important

There is a significant difference between user fields Other1-Other20 and user fields Other21+.

- Other1-Other20 are stored in the main calling list table, they are defined per-device and can be modified by agent desktop requests to OCS.
- Other21+ are stored in separate table, they are defined per-contact and they cannot be modified.

It is recommended that you use Other1-Other20 fields first and only use Other21+ fields when all Other1-Other20 fields are being used.

It's possible that the contact data you import into CX Contact is stored into two separate database tables.

Example	**Customer Information:** • John Smith • Two devices (primary and secondary)

- One chain: The chain_id is 1

User-defined fields used:

- Other 5: Device information (primary vs. secondary)
- Other 20: A promise to pay, answered by spouse
- Other 21: The amount John promised to pay ($500.44)
- Other 22: The payment date (05-10-2018)

Results:

In this scenario, two tables are used in the database: the *main* table and the *secondary* table.

The *main* table contains two records for John Smith - one for each device. It includes all customer data, including the data contained in the Other5 and Other20 fields.

c_first_name	c_last_name	contact_info	chain_id	chain_n	c_other1	c_other2	c_other5	c_other20
John	Smith	5099987744	1	0	1000	Gold	Primary	Promised to pay this month
John	Smith	5069985710	1	1	1000	Gold	Secondary	Answered by spouse

The *secondary* table contains the user data contained in Other21 and Other22 fields:

ud_chain_id	ud_key	ud_value
1	c_other21	5/18/2018
1	c_other22	$500.44

In this table, you will still see two separate records for John Smith, but this time the records are not tied to a device; instead, they are tied to a Chain ID. In this example, the value of ud_chain_id is 1, which, as you can see in the *main* contact list table, is associated with customer John Smith. Also note that the labels in the header row always contain the prefix ud. The remaining part of the labels match to those in the main table.

You'll also notice that the Other21 and Other22 fields (the amount John Smith promised to pay and the date on which he promised to pay it) are not standard column headings in this table; instead, they're presented as user data within a record. This table is designed that way to support filtering functionality within CX Contact, meaning that CX Contact can easily join the two tables together when it receives a request to filter data (in the case of selection rules) within the contact list.

Refer to the Import a Specification File page to see how a database table is created from a specification file.

Related Topics

- Create and Manage Contact Lists
- Create and Manage List Rules

- Search for a Contact in a List
- Specification Files
- Create Data Mapping Schemas

Import, Export, and Manage Contact Lists

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.

Important

For import and export of data defaults, CX Contact supports the default character set ISO 8859-1 (ISO Latin 1), as well as UTF-8 and Windows-1252. It is important to use the correct character set, especially if your data contains non-ASCII characters. Otherwise, some characters, such as accented characters, might appear as other characters.

This article describes how to import and manage contact lists. It includes the following topics:

- Import a list
- View import activity
- Create an empty list object
- Export a list
- Edit a list
- Delete a list
- Manage contacts

Import a New List

There are two basic steps to importing a contact list in CX Contact:

- Map the data
- Import the list

Data Mapping

Before importing a contact list, you need to decide how you want the contact data to be mapped in CX Contact. Here are your options:

- Create a header row in your contact list with field names that match those in the CX Contact contact list. When the file is imported, the data is mapped directly into the corresponding contact list fields.
- Use a specification file to map custom fields to CX Contact fields. If you choose this option, you will need to import the specification file before importing the contact list. Refer to the Import Specification Files page for instructions.
- Use the data Mapping feature in CX Contact to define the mapping for your contact list. If you choose this option, you will need to create the data mapping schema before importing the new contact list. Refer to the Create a Data Mapping Schema page for instructions.

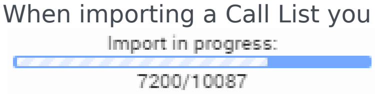
Import the Contact List

To import the contact list, click **New->List** to go to the **New List** page. The table below describes the available list upload options.

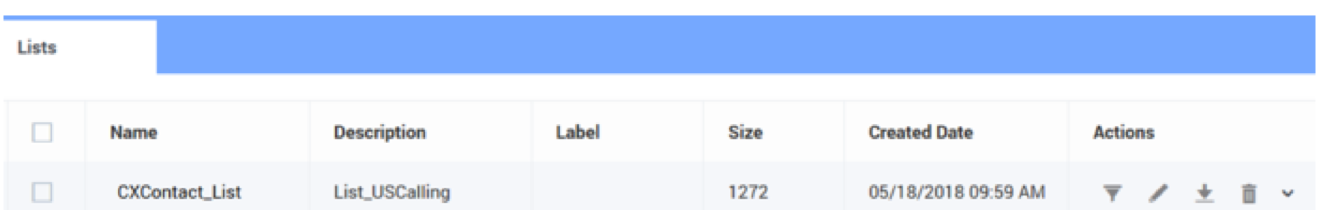
Option	Description
Upload Rule	Select an upload rule if, during the upload, you want the records within your contact list to be split according to defined splitting criteria. All upload rules are defined on the **List Rules** page in CX Contact. Related Documentation: Create and Manage List Rules
Secure with encryption	To secure a Contact list with encryption, select the checkbox. When this option is selected, the system will accept input files encrypted with an asymmetric key using PGP Encryption. Also, when this option is selected exported files will also be encrypted with an asymmetric key using PGP Encryption. Related Documentation: Security
Specification File	To use a specification file, set the **Use Specification File** switch to the **On** position and then choose a specification file from the **Specification File** menu.. All specification files are imported via the **Lists -> Specification Files** page in CX Contact. Related Documentation: Import Specification Files
Data Mapping	This option is enabled only when the **Use Specification File** switch is set to **Off**. It allows you to apply a data mapping schema to your contact list. All data mapping schemas are created

Option	Description
	on the **Data Mapping** page in CX Contact. Related Documentation: Create a Data Mapping Schema
Label	If you want to apply a labeling schema to the contact list, select the labeling schema. Related Documentation: Create and Manage User Field Labels
Use Custom Timezones	If you want to override the automatic system timezone assignment and instead use the entries you created in the time zone compliance section of CX Contact, leave the **Use custom time zones** option checked (this is checked by default). Related Documentation: Time Zone Assignment Options

Once you click **Import**, the file will begin loading, and contacts will be loaded into the contact list. The new contact list appears on the **Lists** page and includes the following details:

- **Name** - Name of the list
- **Description** - Description of the list (if specified)
- **Label** - The labeling schema being applied to that contact list, if applicable.
- **Size** - The number of contact records in the list.
  - When importing a Call List you will now see a progress bar in the **Size** column. The **Progress bar** 

displays the current status of the import process.
  - To cancel the process of importing a Call List, click the **x** next to the Progress bar.
- **Created Date** - The date the list was created
- **Actions**
  - **Filter** - To create a virtual list using a selection rule, click the filter icon. As part of creating the new list, you can see a preview of the list. The preview can be discarded, overwritten by the selection of a different rule, or saved as a new list, based on the original list.
  - Edit
  - Download
  - Delete
  - View Import Activity



View Import Activity

Once a list has been imported into CX Contact, you can view all import activity associated with it. To do this, go to the main **Lists** page and from the **Actions** menu, click **Import Activity**. The following information is presented:

- Start Time - The start time of the import
- End Time - The end time of the import
- Original - The number of lines in the input file. Click the download icon to download the Original input file. The Original input file may be used to validate the Calling List content.
- Rejected - The number of lines rejected during import.
- Action Type - See below for a description of each append type.
- Activity Type - Indicates if the import activity is manual or list automation.
- Import Result - Indicates if the import activity succeeded or failed.
- Message - An Error message about the failed import result.

Important

- Columns Action Type, Import Result and Message are only available for the Manual activity type. These fields will be empty for the List Automation activity type.
- The default CX Contact behavior is to reject Bad Numbers/No Devices during the Import process. These rejected records are stored as a downloadable artefact. For specific use cases (for example, auditing, or number tracing services), users can create a selection rule for invalid numbers that supports the importing of rejected records into target lists.

Create an Empty List Object

If you want to create a new list from scratch:

1. Select **New->List**.
2. Enter the list name and description (optional).
3. Click **Import**.

You can now append contacts to this empty list object, using the append types described below.

Export a List

When you export a contact list, a CSV text file is made available as a download from CX Contact. All data associated with the contact list, including user-defined data, is included in the export as a single list. See Contact Lists Fields for more information about contact list fields.

To export a contact list, select the Download icon from the **Actions** menu next to the name of the list to be exported.

> **Important**
> When dowloading a Contact list, CX Contact replaces the other1-OtherN user-defined fields with the field labels assigned to the list. For details about User-defined Field Labels refer to the Create and Manage User-defined Field Labels.

Edit a List

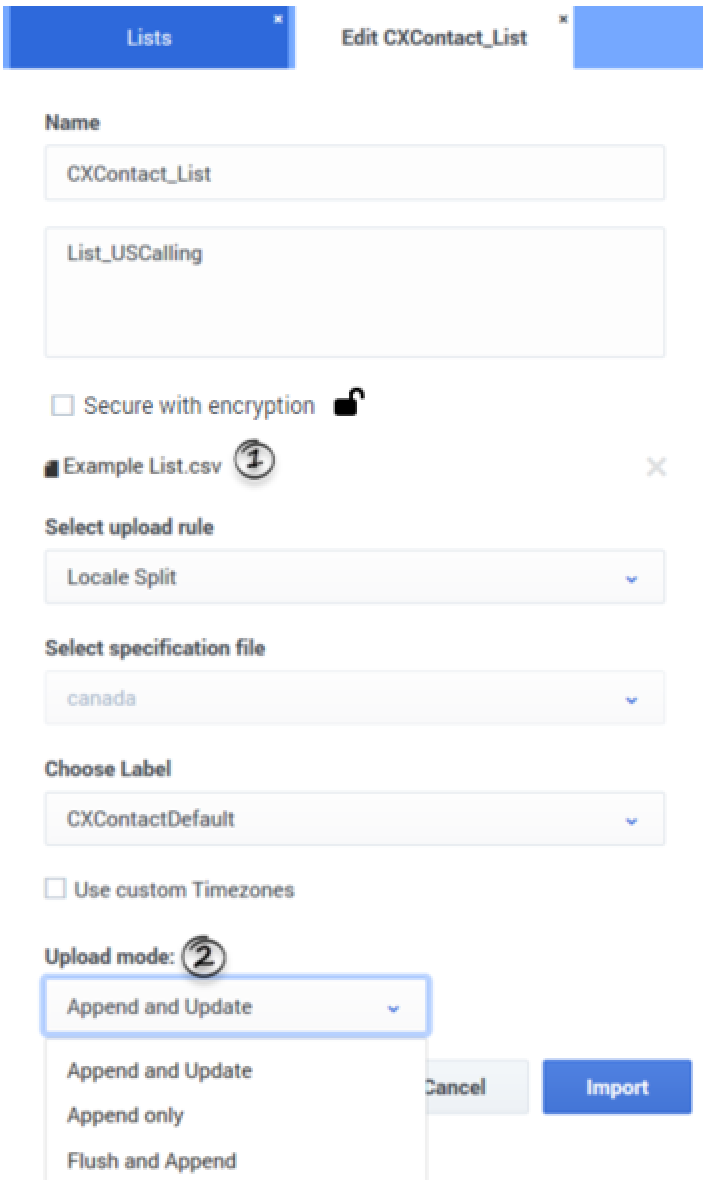
Once you've created a list, you can edit the list and the contacts contained within that list.

To edit a list, on the **Lists** page, select the list to be edited by clicking the name or by selecting the pencil icon. Edit any or all of the list details as required.

Or, if you've added contacts to the list and need to update the list, select **Select File** to import the new records.

In the Upload mode menu, select from the following append types:

- Append and update - the imported records are added to the contact list. If CX Contact finds a duplicate record it overrides the existing record with the new record.
- Append only - the imported records are added to an existing contact list. Duplicate records are always ignored.
- Flush and append - before the new records are imported into the contact list, the existing contact list is completely flushed.



Important

Regardless of the append type, each Client ID in a contact list must be unique. You cannot have duplicate Client IDs in any contact list.

Delete a List

To delete one or more contact lists, select the check box next to the list(s) to be deleted and click **Delete**.

The list and all contacts in that list are deleted from CX Contact

Manage Contacts within a List

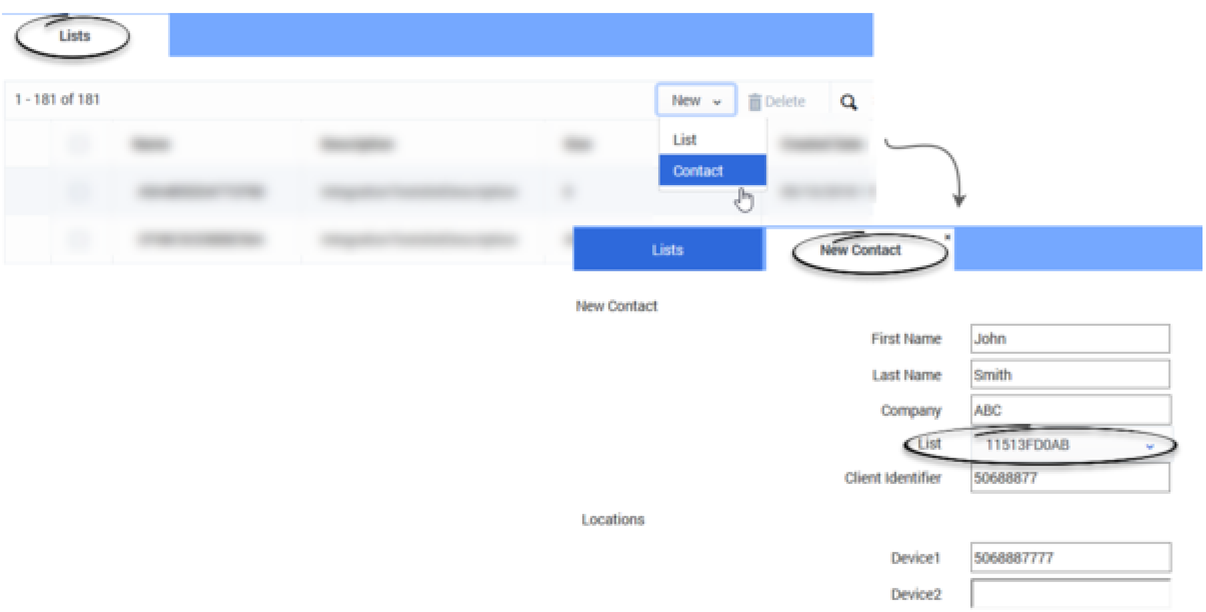
Once you've created a list, you can add or delete contacts within the list.

Add a Contact to a List

You can create a new contact and assign that contact to a list in one of two ways:

Option 1

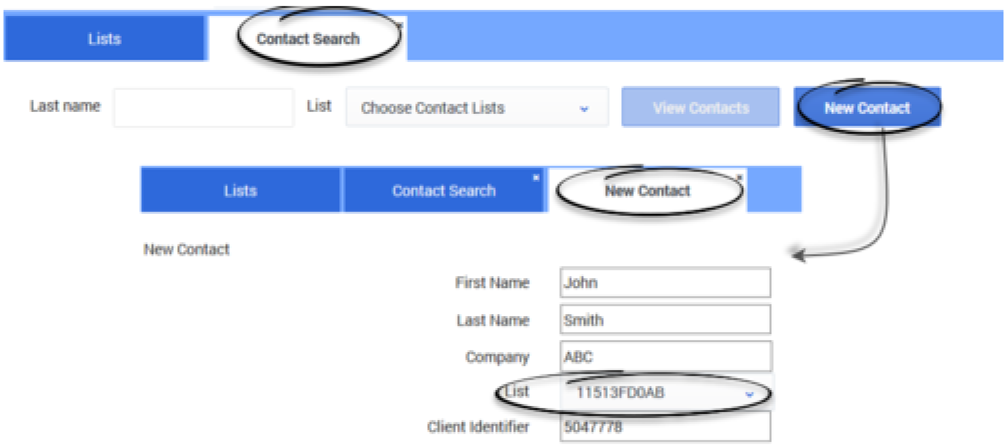
1. From the **Lists** page, select **New -> Contact**.
2. Enter the contact information.
3. From the List drop-down, select the list that the contact will belong to.



Option 2

1. From the tabbed Lists menu, select **Contact Search.**

2. On the **Contact Search** page, click **New Contact**.
3. Enter the contact information.
4. From the **Lists** menu, select the list that the contact will belong to.



For information about contact list fields, go here.

Delete a Contact from a List

When you delete a contact from a list, you permanently delete the contact.

To delete a contact from a list:

1. From the **Lists** menu, select **Contact Search**
2. On the **Contact Search** page, search for the contact you want to delete.
3. Select each contact you want to delete and click the trash can icon.

> **Important**
> If a contact you're searching for has multiple devices, the search results will display a separate record for each device. For example, if a contact has three devices, the search results will return three separate results for the contact - one for each device.

Related Topics

- List Formats, Fields, and Database Tables
- Create User-defined Field Labels
- Import Specification Files

- Create a Data Mapping Schema

Create and Manage User-defined Field Labels

> **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.

By default, all user-defined fields in a contact list are labelled as Other1, Other2, Other3, and so on, but you can override the default labels to clearly identify what the field is used for. For example, if you use Other21 to store the current balance remaining on a contact's account, you can change the field's Other21 label to Balance.

In this article, you'll learn how to change the default label for a user field. More specifically, you'll learn the following:

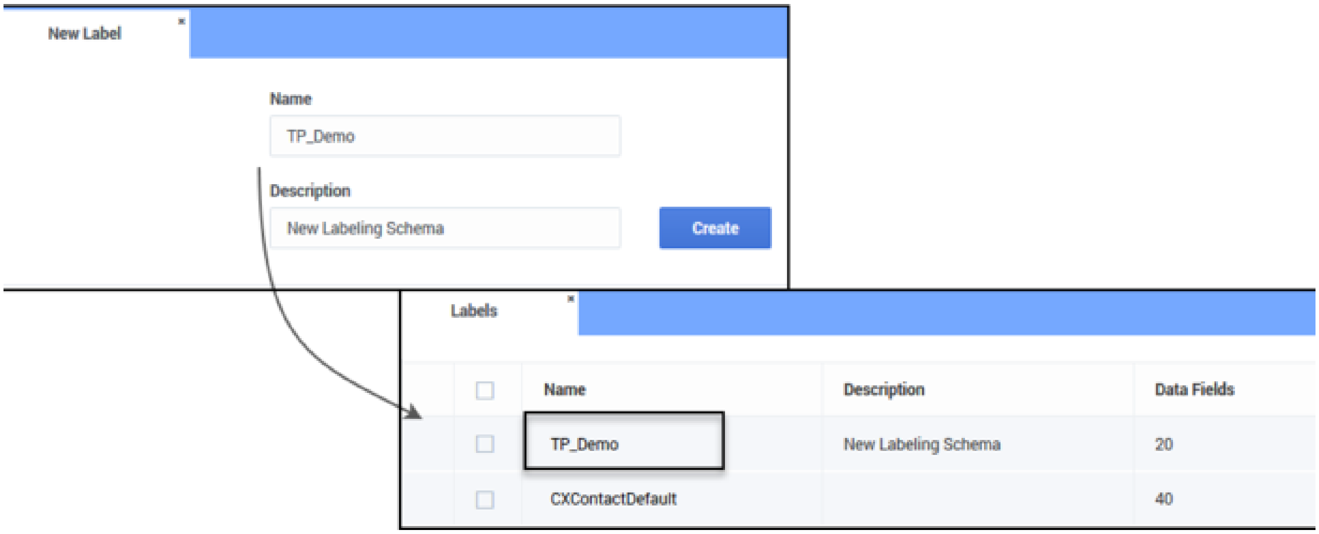
- Create the labeling schema that stores all user fields and their label properties
- Create or edit user fields in a labeling schema and define their label properties
- Apply a labeling schema to any of the following:
  - Contact list
  - Dialing profile, campaign template, or campaign group
  - List rules

Create a Labeling Schema

A labeling schema is the shell that stores all defined label properties for a user field in a contact list. You must have a labeling schema in place before you can create or edit user fields and define their label properties.

To create the labeling schema, go to the **Lists -> Labels** page and click **New**.

Next, specify a name and a description for the labeling schema and click **Create**. You'll return to the main **Labels** page and see the new labeling schema you just created.



The main Labels page displays the following properties for each labeling schema:

Property	Description
Name	Name of the labeling schema.
Description	The description of the schema.
Data Fields	The number of data fields stored in the labeling schema. **Note:** Every labeling schema contains the standard 20 user fields (Other1-Other20) included in a contact list, so the minimum value in this field will always be 20.
Created Date	The date you created the labeling schema.
Actions	Use the **Actions** menu to do any of the following: • Click the pencil icon to edit the labeling schema (name and/or description) or the fields and their label properties contained within the schema. • Click the trash can icon to delete an entire labeling schema. This deletes all user fields and defined label properties contained within that schema. • Click the page icon to duplicate an entire labeling schema. This duplicates the schema name (with the suffix duplicate appended to it), description, all user fields and label properties.

Important

Every Labels page contains a default labeling schema that cannot be deleted.

Create or Manage User Fields and Labels

Once you've created the labeling schema, you can click its name and do any of the following:

- Create a new user field and define its label properties
- Create multiple user fields simultaneously
- Edit existing user fields or label properties
- Delete user fields
- Search for a user field

Create a New User Field and Define Label Properties

To create a new user field in your labeling schema and define its label properties, click the name of the labeling schema on the main **Labels** page. You'll go to the **User Fields** page that lists all user fields and corresponding label properties in that labeling schema.

Click **New** and define the label properties as described in the table below. An example follows.

Click **Import** and import label definitions from a **.json** file. For details see Import Lables.

Property	Description
Field Name	This is the default field name - Other1, Other2, Other3, and so on. When you create a new user field, the system auto-populates the value of **Field Name** so that all user fields are in sequential order. For example, if you currently have 27 user-defined fields in your contact list (Other1-Other27) and you click **New** to create a new user field, the **Field Name** value will default to Other28. You cannot edit this value.
Label	This is the label that corresponds to the field name.
User Data Key Name	Used to identify the type of data stored in a field within the contact list.
Display	Select this option if you want the new field label to override the default Other field label in all sections of the user interface that display contact list fields.
Attach to calls	Select this option if you want the new user field to be attached to outbound calls, so that agent desktop applications can access the data.

Once you define the properties and select **Save**, you'll return to the **User Field**s page and see the new label properties that correspond to your user field.

Example

If you want to use the Other21 field to store the balance owing on a customer's account, you could use the following label properties:

- Field Name: Other21 (you cannot change this)
- Label: Balance
- User Data Key Name: USR_BALANCE_OWING

Field Name	Label	Display	Attach to calls	User data Key name	Actions
Other21	Balance			USR_BALANCE_VALUE	

Create Multiple User Fields

If you want to create more than one new user field, go to the **User Fields** page and click **New Multiple**.

Next, in the **Field** count box, enter the number of new fields you want to create. If, for example, you have 20 existing user fields and you want to add 12 new user fields, type 12 in this box. When you're finished, the system will add 12 new fields in sequential order (Other21-Other32).

You will then select each new field individually to define its label properties.

Edit User Fields

To edit the label properties of a user field, go to the **User Fields** page and click the name of the field (in the **Field Name** column) or click the corresponding pencil icon to open and edit the field's properties.

> **Important**
> You cannot edit the **Field Name** for any user field.

Import Labels

To import labels from a **.json** file, click the **Import** icon.

Next, in the **Import Label Definition from file** window, click **Select file (.json)**.

After you select the .json file click **Import**. The new label is created and an **Import Label** tab is opened for the imported label.

Review the details, make modifications if necessary and click **Create**. The imported label will now appear in the **Labels** table.

Delete User Fields

To delete a user field, click the trash can icon that corresponds to that user field or click the check box to the left of the field name and click the trash can icon at the top of the list of user fields.

> **Important**
>
> The following rules apply:
>
> - Because the user fields in a contact list are ordered sequentially, you can only delete the last user field in a sequence. For example, if you have 27 user fields in your schema (Other1-Other27) and you want to delete Other25, you must first delete Other27 and then Other26.
> - Because Other1-Other20 fields are standard fields in a contact list, those fields cannot be deleted. You can only edit the label properties for those fields.

Search for a User Field

Use the search box located at the top of the user field list to search for a user field.

Create Multiple User Fields

If you want to create more than one new user field, go to the **User Fields** page and click **New Multiple**.

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Edit User Fields

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> **Important**
>
> You cannot edit the **Field Name** for any user field.

Delete User Fields

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> **Important**
> The following rules apply:
>
> - Because the user fields in a contact list are ordered sequentially, you can only delete the last user field in a sequence. For example, if you have 27 user fields in your schema (Other1-Other27) and you want to delete Other25, you must first delete Other27 and then Other26.
> - Because Other1-Other20 fields are standard fields in a contact list, those fields cannot be deleted. You can only edit the label properties for those fields.

Search for a User Field

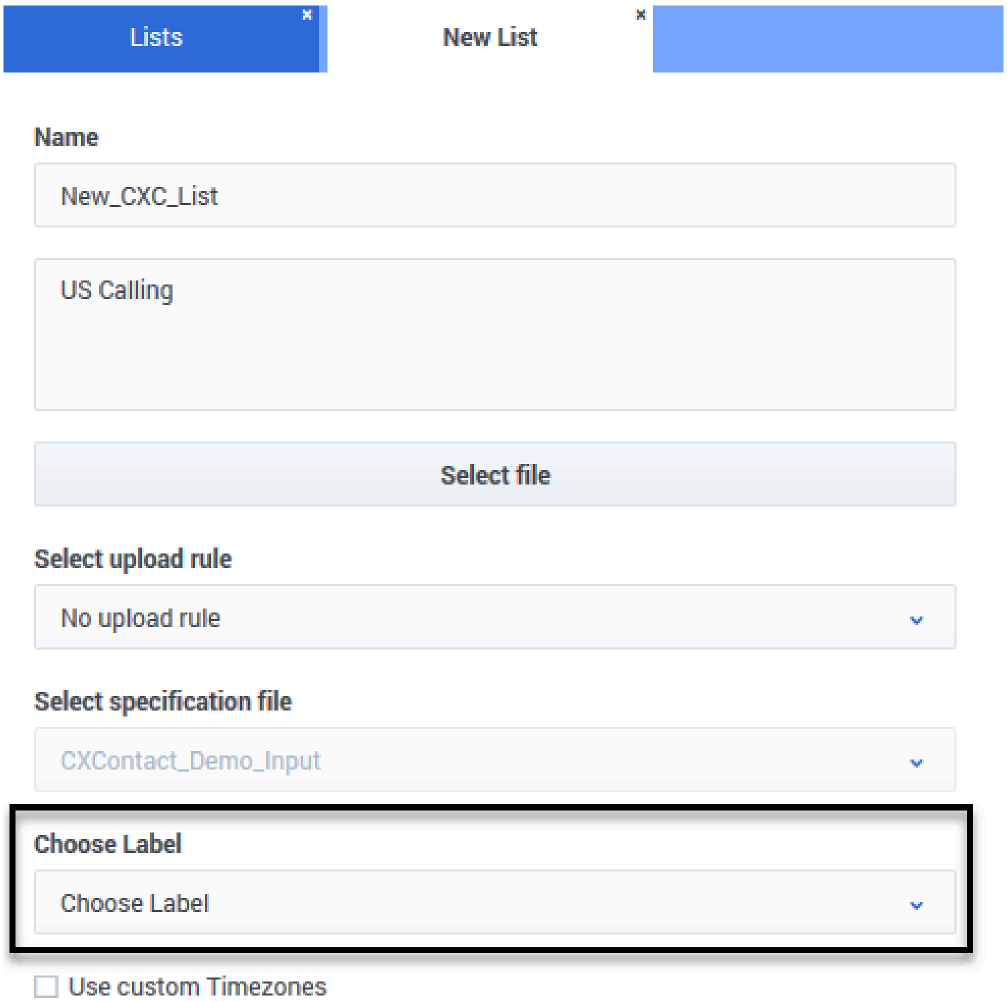
Use the search box located at the top of the user field list to search for a user field.

Apply a Labeling Schema to a Contact List

> **Important**
> A contact list can have only one labeling schema, but a labeling schema can belong to multiple contact lists.

After you've created the labeling schema, you can apply it to any contact list stored within CX Contact. Here's how it works:

1. Create and save the labeling schema.
2. Create or edit a contact list and choose the labeling schema from the **Choose Label** menu.



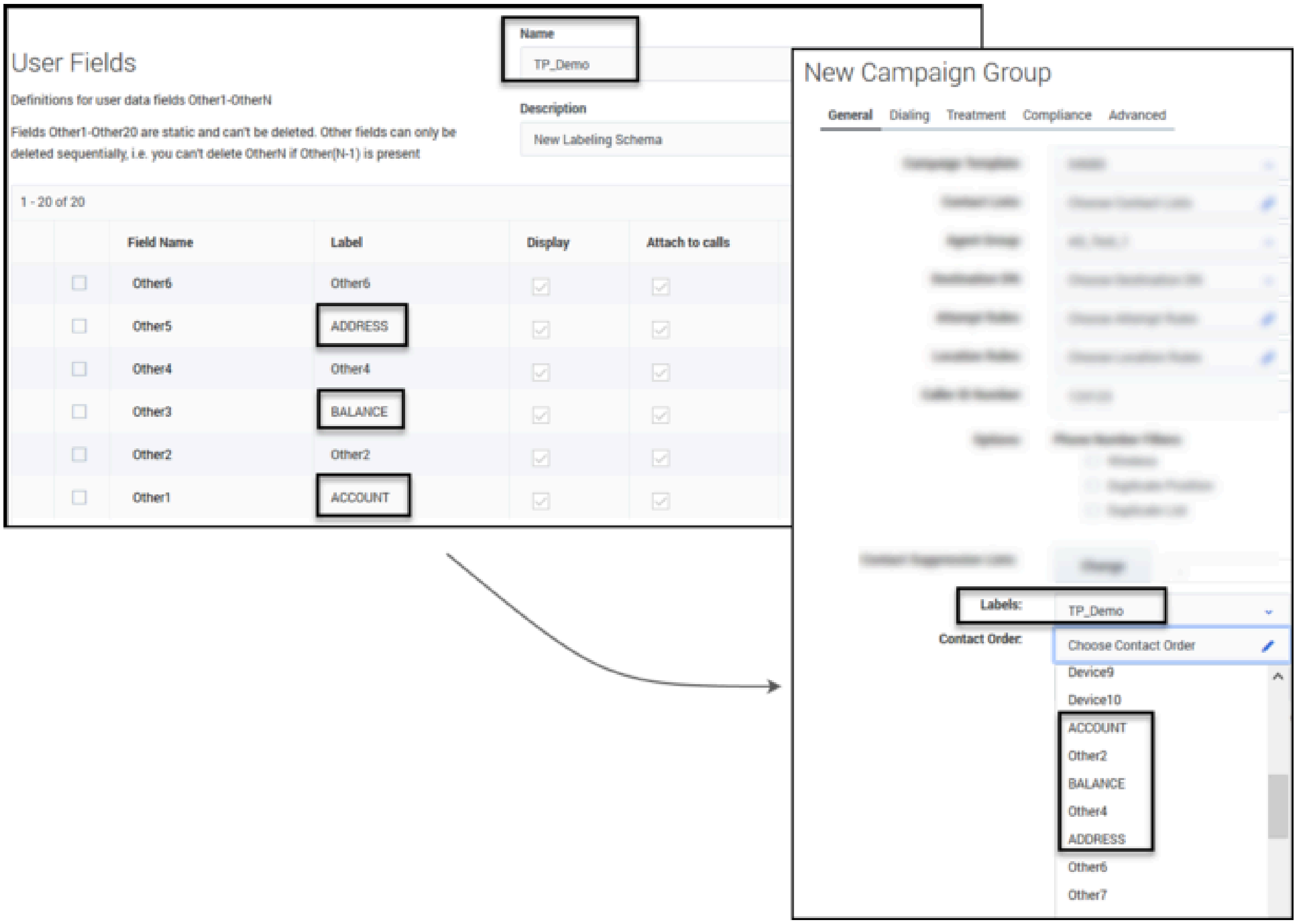
Now, when you go to the **Lists** page, the name of the labeling schema that you applied to a contact list appears in the corresponding **Labels** column.

Apply a Labeling Schema to a Dialing Profile, Campaign Template, or Campaign Group

Once you've created a labeling schema, you can apply it to a dialing profile, campaign template, or campaign group. Here's how:

1. Create the labeling schema.
2. Create or edit an existing dialing profile, campaign template, or campaign group.
3. From the **Labels** menu, select the labeling schema.

The labeling schema will be applied to all contact lists that are part of the campaign group. The labels within the labeling schema will populate in the Contact Order menu as long as you selected the Display option when you defined the label properties for the user fields.



Apply a Labeling Schema to a List Rule

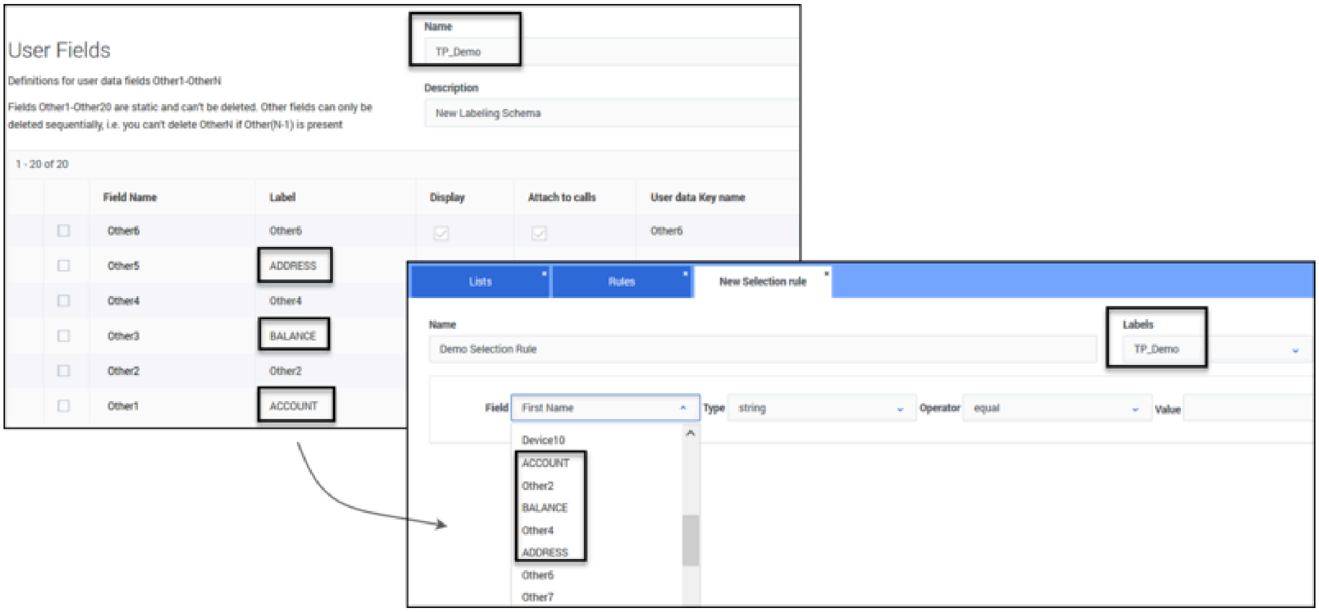
Once you've created a labeling schema, you can apply it to a either a selection rule or an upload rule, as follows.

Selection Rule

To apply a labeling schema to a selection rule.

1. Create and save the labeling schema.
2. Create or edit an existing selection rule.
3. Select the labeling schema from the **Labels** menu.

The user fields contained in your labeling scheme will now populate in the **Fields** menu as long as you selected the **Display** option when you defined the label properties for the user fields.



Upload Rule

If you are using the **Split by Field** option when applying an upload rule to a contact list, you can apply a labeling schema. Here's how:

1. Create and save the labeling schema.
2. Create or edit an existing upload rule.
3. Check the **Use Splitting** option.
4. Select **Field** from the Split by field menu.
5. Choose the labeling schema from the **Labels** menu.

The user fields contained in your labeling scheme will now populate in the **Fields** menu as long as you selected the **Display** option when you defined the label properties for the user fields.

Filtering Rule

To apply a labeling schema to a filtering rule:

1. Create and save the labeling schema.
2. Create or edit an existing filtering rule.
3. Select the labeling schema from the **Labels** menu.

If you use the **Use ordering** option, the user fields contained in your labeling scheme will now populate in the **Fields** menu as long as you selected the **Display** option when you defined the label properties for the user fields. You can then define how you want to order and display the records within these fields in a contact list (options are Ascending and Descending). Refer to the Filtering Rules section of the Create and Manage List Rules page for more information.

Create and Manage List Rules

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:

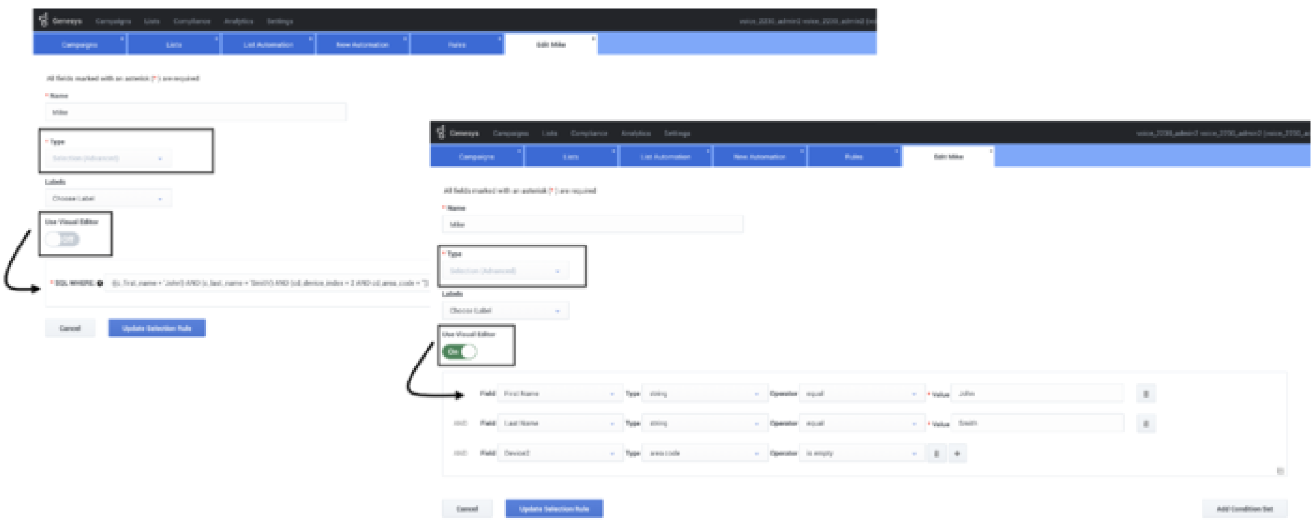
- Contacts - The selection rule applies to a contact list.
- Suppression - The selection rule applies to a suppression list.
- Advanced - The selection rule applies to a contact list export and filtering rules.

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.

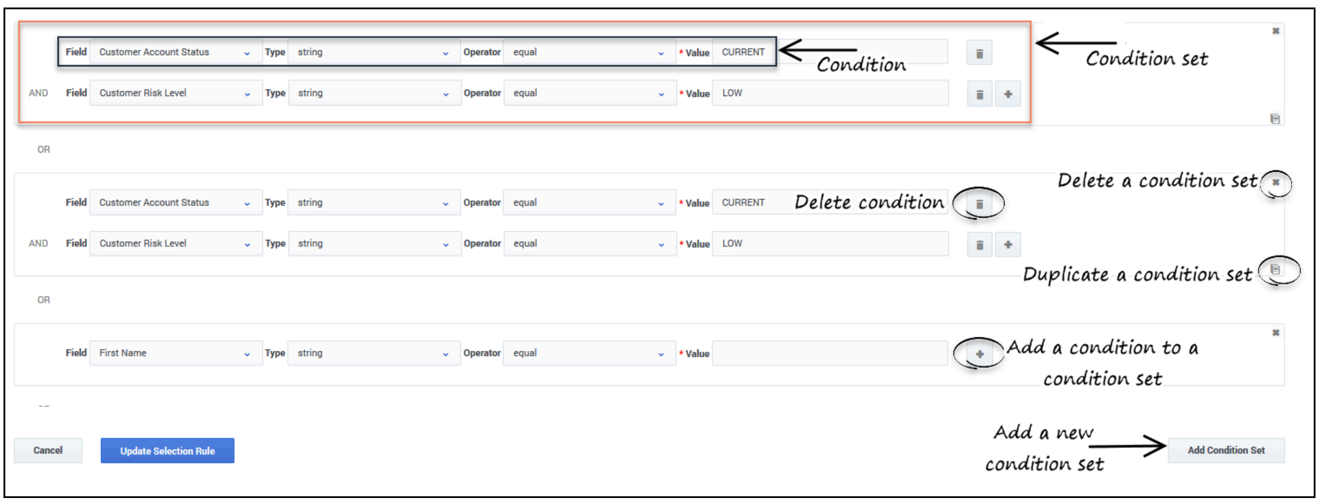
	String	Numeric	Area Code	Country Code	Timezone	Exchange	State Code
Equal	●	●	●	●	●	●	●

	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

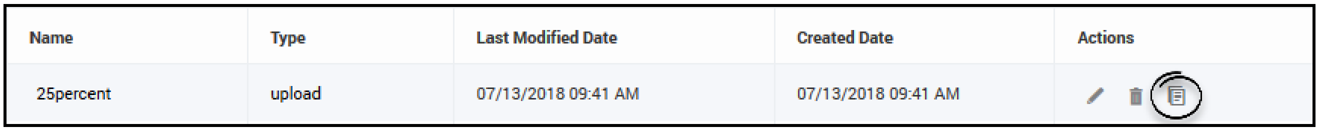
From the **Rules** page, you can edit or delete a rule:

- 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.

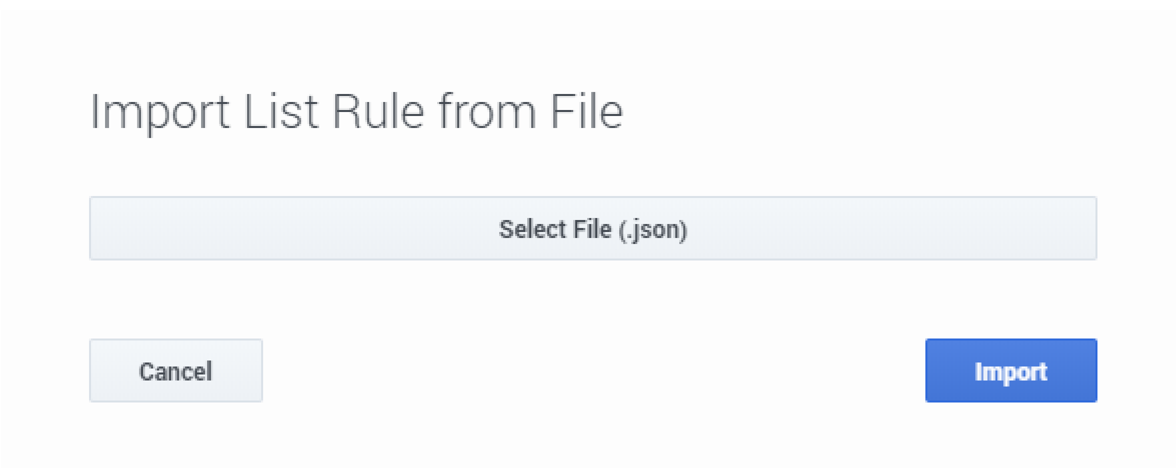


Name	Type	Last Modified Date	Created Date	Actions
25percent	upload	07/13/2018 09:41 AM	07/13/2018 09:41 AM	

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

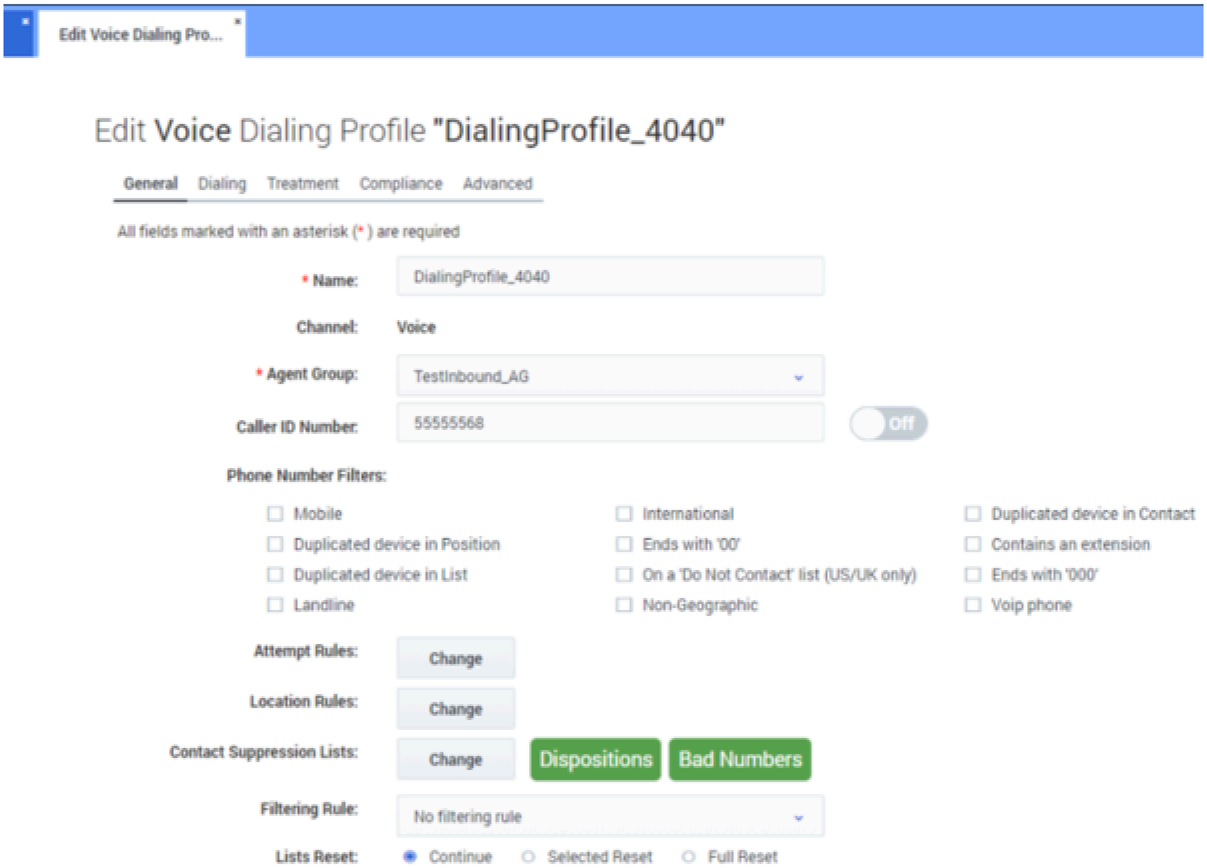
Apply Phone Number Filters

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.

When you create a dialing profile, campaign template, or campaign group, you can apply phone number filters to the contact list associated with the campaign group. When you apply a phone number filter, all devices that match the filter criteria are excluded from the contact list.

To apply phone number filters, go to the General tab for the campaign object and check the box for each type of filter you want to apply. For example, if you select the Mobile filter check box in the Phone Number Filters group, mobile phone numbers will be removed from the contact list.



The phone number filters available to you depend on the channel (voice, SMS, or email) being used for this campaign. All available phone number filters are listed in the table below.

Filter	Description
Mobile	Excludes all mobile phone numbers.
Landline	Excludes all landline phone numbers.
Duplicate device in Position	Filters devices that have already occurred in the same device field in a previous record. For example, if - for two (or more) contacts - the Device2 fields contains the same telephone number, Device2 will be filtered for the second (and third, fourth, etc.) contact(s).
Duplicate device in List	Filters devices that have already occurred in any device field in that, or any previous, contact. For example, if - for a single contact - the Device1, Device2 and Device3 fields contain the same telephone number, Device2 and Device3 will be filtered, and if that telephone number is repeated in any device field for any contact that follows, the device(s) will be filtered.
International	Excludes all numbers that contain a country code

Filter	Description
	different from that of the tenant. **Important**: Do not select this option if you make calls to locations outside of the country code associated with the tenant.
Ends with 00	Numbers ending in 00 are excluded because they might be switches or PBXs.
On a Do Not Contact list (US/UK only)	Excludes numbers that are part of a Do Not Contact list. These lists are maintained by various U.S. states, the Federal Trade Commission (FTC), the DMA, and the United Kingdom.
Non-Geographic	Excludes telephone numbers that are not associated with a region or locality.
Duplicate device in Contact	Filters devices that have already occurred in a previous device field in the same contact. For example, if - for a single contact - the Device1, Device2 and Device3 fields contain the same telephone number, Device2 and Device3 will be filtered.
Contains an extension	Excludes all number containing an extension - for example, 555-558-9965 Ext 319
Ends with 000	Numbers ending in 000 are excluded because they might be switches or PBXs.
VoIP phone	Excludes phone numbers that could be assigned to VoIP services.

Assign Weights to Contact Lists

Important

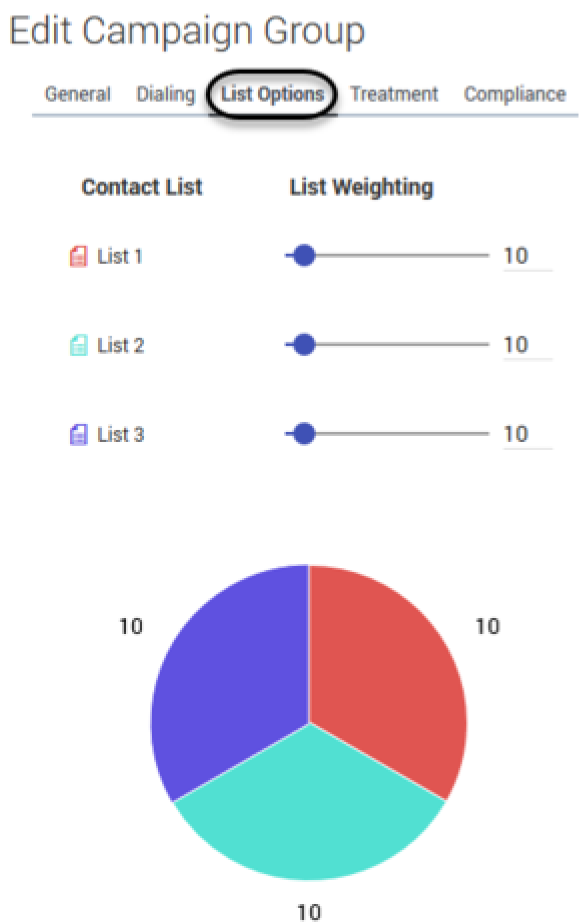
The content of this document has been moved and is no longer being updated in this location.
For the latest content and most recent updates, see the CX Contact Help on the Genesys Multicloud site.

If you have a campaign group with more than one contact list, you can assign each list a relative weight, which represents the ratio of records that will be retrieved from a contact list for the campaign group.

Here's how it works:

Let's say you have three contact lists (List 1, List 2, List 3) for a campaign group.

When you go to the Campaign Group page and then click the List Options tab, you'll see that the three lists are defaulted to a weight value of 10, with a total weight value of 30 (List 1 + List 2 + List 3 = 30).



Important

On the List Options tab, only the weight scale function (with the corresponding pie chart) is enabled. All other options are reserved for future use and are therefore disabled.

Based on these values, the system uses the following formula to calculate the percentage of records that would come from each contact list within the campaign group:
<weight of a contact list> / <total sum of weights> * 100

If you keep the default values of 10 for each list, the system calculates and determines the following:

- List 1: 10/30*100 = 33.3% (meaning that 33.33% of records are pulled from List 1)
- List 2: 10/30*100 = 33.3% (meaning that 33.33% of records are pulled from List 2)
- List 3: 10/30*100 = 33.3% (meaning that 33.33% of records are pulled from List 3)

Let's say you want to change the default values, as follows:

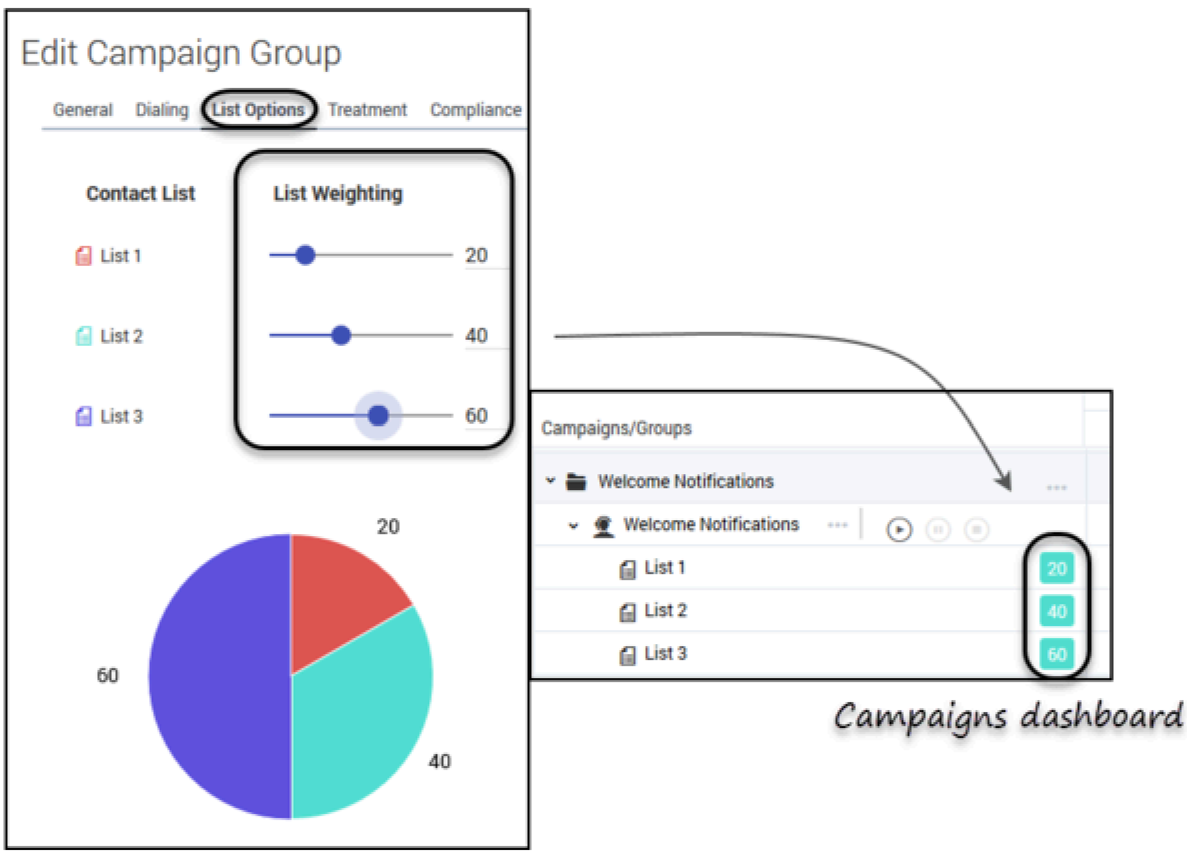
- For List 1, you move the slider to 20.
- For List 2, you move the slider to 40.
- For List 3, you move the slider to 60.

The total sum of all weight values (List 1 + List 2 + List 3) = 120

Returning to the formula, <weight of a contact list> / <total sum of weights> * 100, CX Contact calculates and determines the following for this campaign group:

- List 1: 20/120*100 = 16.67% (meaning that 16.67% of records are pulled from List 1)
- List 2: 40/120*100 = 33.33% (meaning that 33.33% of records are pulled from List 2)
- List 3: 60/120*100 = 50.00% (meaning that 50% of records are pulled from List 3)

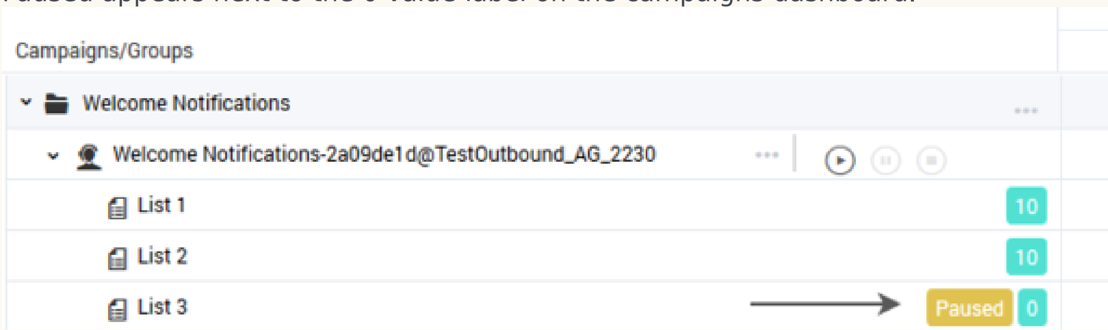
The pie chart below the scales illustrates the proportional distribution of list weights. It's updated dynamically when you change the weight of a list or add new contact lists to the campaign group.



Now, return to the main Campaigns page and if you expand the view (click **Expand All** at the top of the page), you'll see that the values you assigned to each contact list (20, 40, 60, in this case) are displayed next to each contact list.

Important

If a contact list weight is set to 0, all dialing for that list is paused, and the label Paused appears next to the 0 value label on the campaigns dashboard.



Create and Manage List Automation Tasks

> **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.

CX Contact's List Automation feature enables you to schedule repetitive tasks that trigger pre-defined events.

More specifically, you can schedule frequent scans of a remote FTP directory in search of lists matching specified rule criteria. When a list matching the criteria is found, one of the following events occurs:

- The file is imported into CX Contact as a new contact list or the records within the list are appended to an existing contact list in CX Contact.
- The file is imported into CX Contact as a new contact list or the records within the list are appended to an existing contact list in CX Contact, which then triggers a new campaign group.
- The file is imported into CX Contact as a new suppression list or the records within the suppression list are appended to an existing suppression list.

You can also use the List Automation feature to schedule a contact list export. The file is exported out of CX Contact and sent to a remote FTP directory. This can be useful in the scenarios outlined below.

List Export Use Cases	• The exported contact list will be used to update a CRM system incrementally throughout the day. • You will use the List Automation feature later to grab the exported contact list and import it into CX Contact as a suppression list.

The videos and article below describe how to use the List Automation feature in CX Contact.

Link to video
Link to video Link to video Link to video

Use the instructions below to create any list automation task, regardless of the event you intend to trigger.

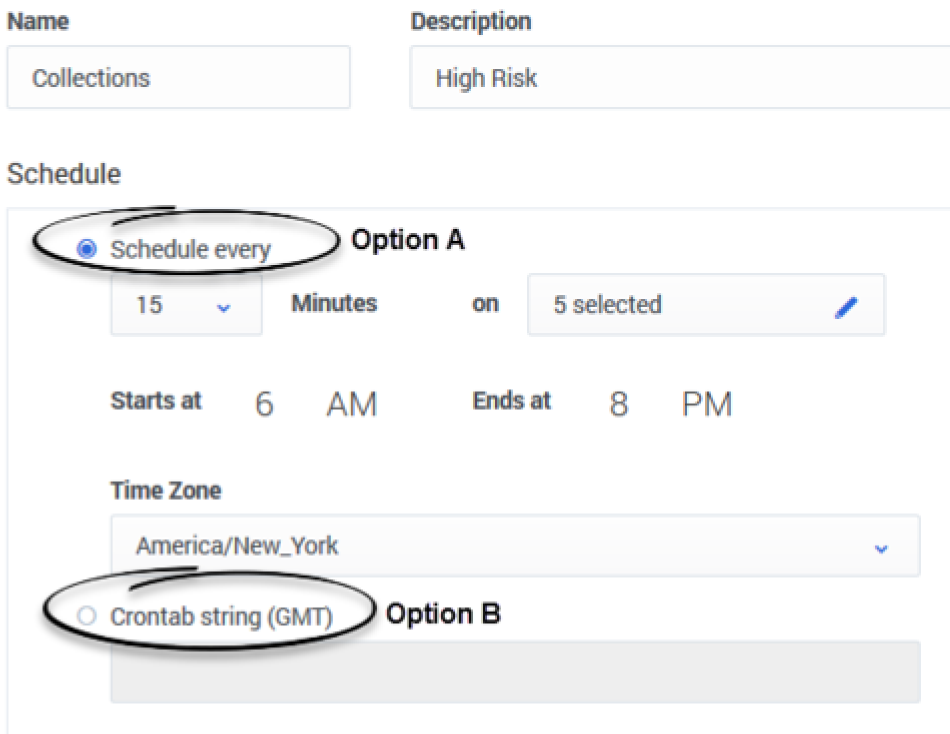
To start, go to the Lists-->List Automation page and click **New**. Give the job a name, a description (optional), and then follow these steps:

- Step 1 - Create a run schedule
- Step 2 - Specify the FTP directory and credentials
- Step 3 - Define the trigger event (Action type) and rules

Create a Run Schedule

Here, you'll specify the day, time, and frequency of the scheduled job runs. You can do this in one of two ways:

- Choose from a series of scheduling options
- Specify a Cron expression



Scheduling Options

To choose from the available scheduling options, click the **Schedule** radio button and specify the following:

- Schedules every - This is the frequency of the run. For example, if you schedule a run on Wednesday from 1 pm to 2 pm, and in this field you select 15 minutes, four runs will take place between 1 pm and 2 pm on Wednesday. Minimum frequency is 15 minutes; maximum is 60 minutes.
- Day/s of the Week - The day/s in which the run will take place. You can select one or multiple days of the week, or you can select **All** if you want the run to take place every day for this particular job.
- Start time - The start time of the run.
- End time - The end time of the run.
- Time Zone - The time zone associated with the start and end time of the run.

Cron Expression

Alternatively, you can click the **Crontab string** radio button and enter a string of five values that represent a run schedule and frequency. The system will convert the string into a time interval and schedule the run/s accordingly.

[+] Show more about Crontab

> Important
>
> The following syntax rules apply:
>
> - There should be five fields. If you choose not to enter an integer in a field, use an asterisk to replace it.
> - Each field is separated by one space (for example 15 * * * *, not 15****).
> - If a field contains a series of integers separated by commas, spaces are not permitted between the integers and commas (for example 15,30,45, not 15, 30, 45).
> - If a field contains a range of values, do not enter a space within the field (for example, 15-30, not 15 - 30).

The tables below present the following information:

- Cron fields and accepted values
- Supported Cron notations
- Cron string examples

Cron Fields and Values

The following image represents a Crontab (Cron table) and the table below it describes the supported fields and values in a Cron string.

```
*    *    *    *    *       command to be executed
-    -    -    -    -
|    |    |    |    |
|    |    |    |    +---- day of week (0-6) (Sunday=0)
|    |    |    +-------- month (1-12)
|    |    +---------- day of month (1-31)
|    +------------ hour (0-23)
+------------- min (0-59)
```

Crontab

Field	Description	Supported Values
1	Minute	0 to 59, or * for no specific value
2	Hour	0 to 23, or * for no specific value
3	Day of Month	1 to 31, or * for no specific value
4	Month	1 to 12, or * for no specific value
5	Day of Week	0 to 6 (0 represents Sunday), or * for no specific value

Supported Cron Notations

The table below lists supported notations within a Cron string.

Notation	Description
Asterisks (*)	Used in place of integers. For example, if you specify 15 in the Minute field but insert an asterisk (*) in the Hour field, the command becomes **Execute a run 15 minutes past every hour.**
Commas (,)	Used to separate values in a single field. For example, if you specify 15,30,45 in the Minute field, the command becomes **Execute a run 15, 30, and 45 minutes past the specified hour.** Important Remember - do not insert spaces between integers and commas. For example, write 15,30,45 instead of 15, 30, 45. Otherwise, CX Contact will throw an error.
Dashes (-)	Used to denote a numerical range. For example, if you specify 15-30 in the Minute field, the command becomes **Execute a run every minute between 15 and 30 minutes (inclusive) past the specified hour.** Important

Notation	Description
	Remember - do not insert spaces within the field. For example, write 15-30 instead of 15 - 30. Otherwise, CX Contact will throw an error.

Cron Examples

The table below lists valid Cron examples.

String	Description
15 * * * *	Executes a run at 15 minutes past the hour, every hour.
0 17 * * 3	Executes a run at 5 pm on Wednesday.
15-30 7 * * 0	Executes a run every minute between 15 and 30 minutes (inclusive) past 7 am on Sunday.
15 14 * * 1,3,4	Executes a run at 2:15 pm on Monday, Wednesday, and Thursday.
0 3 8 9 2,3	Executes a run at 3 am on the 8th of the month AND on Tuesday and Wednesday in September.

Specify the FTP Directory

Specify the SFTP Server's FQDN or IP address, the remote FTP directory and the login credentials used to access it. Only the secure file transfer protocol (SFTP) is supported. The following are valid protocols:

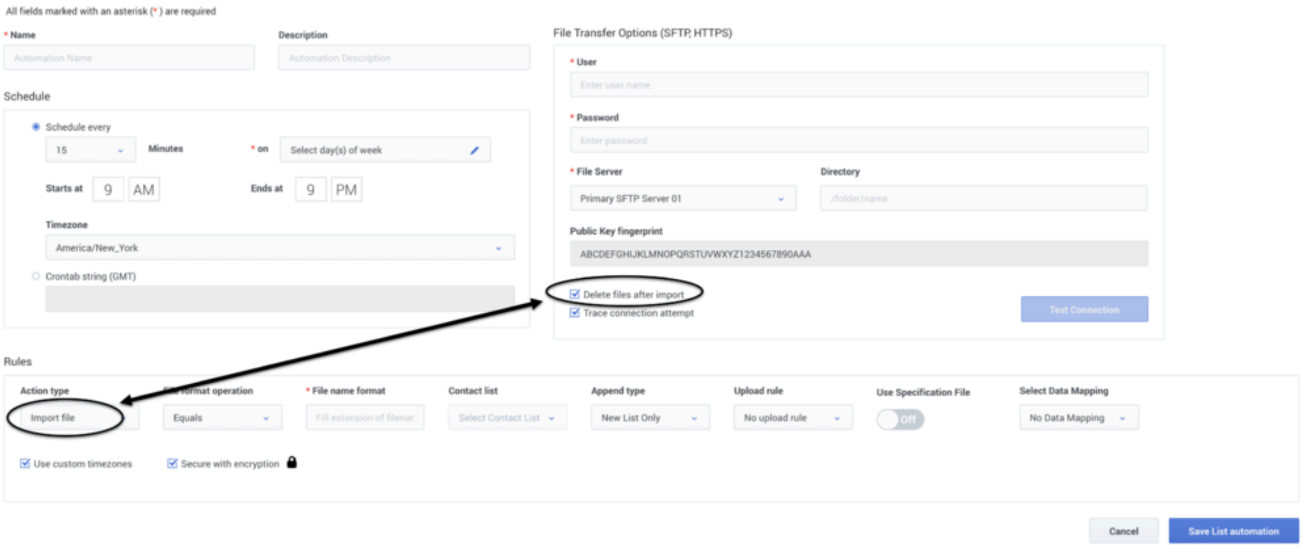
- sftp://hostname/[directory]
- sftp:hostname/[directory]

The FTP File Server drop down menu is populated during configuration, specifically the transaction object. To configure the transaction object with the FTP host and public key fingerprint, please refer to your Genesys Care team.

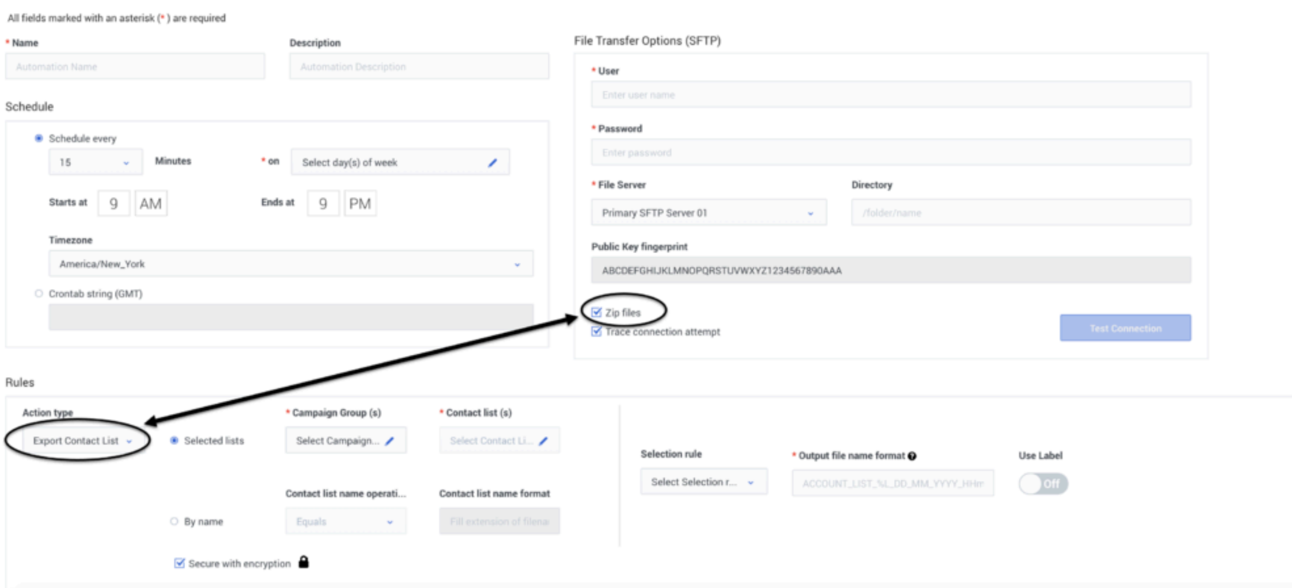
> **Important**
> In a Genesys Engage cloud deployment, specific provisioning steps must be performed in Genesys Engage cloud to enable network connectivity between CX Contact components and the remote SFTP Server. Specifying the SFTP Server's FQDN or IP address is not enough for establishing network connectivity. Please contact your Genesys Account Team for further assistance.

If you're using the List Automation feature to import lists from an FTP remote directory, the Delete files after import option applies. You should always leave this option checked (default). If you do not select the checkbox, the file being imported will remain on the remote directory and will be processed again during the next scheduled run.

If you want to enable FTP event logging select the Trace connection attempt check box. By default, this check box is not selected.



If you're using the List Automation feature to export a list from CX Contact and onto a remote directory, the Zip files option applies. Leave this checked if you want to zip the files being exported to the remote directory.



Define the Trigger Event and Rules

When a scheduled task takes place and a list is extracted from either CX Contact (in the case of an export) or from an FTP directory (in the case of an import), the resulting action will be determined by the rules you set in this section.

To start, go to the **Action type** menu and select the event you intend to trigger:

- Import file - The file is imported into CX Contact as a new contact list or the records within the file are appended to an existing contact list. It appears on the Lists page with all other contact lists.
- Send Campaign Group - One or more input files are imported into CX Contact as a new contact list(s) or the records within the file are appended to an existing contact list(s). A new Campaign Group is then created. The new Campaign Group references the imported contact list(s) and is executed. **Note:** A single Campaign Group is created for all resulting contact lists.
- Suppress file - The file is imported into CX Contact as a new suppression list or the records within the file are appended to an existing suppression list. **Note**: If you select Suppress file, the Required checkbox appears onscreen. If the suppression list being imported or appended is required, check the box. See the Suppression Lists page for more information about Required versus Optional suppression lists.
- Export Contact List - The contact list is exported from CX Contact and sent to an FTP directory.
- Export Analytics Data - Outbound Analytics is exported from CX Contact as CSV files. The CSV files are uploaded to a remote SFTP Server.

The table below describes each rule and identifies its associated triggered event. Remember to watch the videos above to learn how to configure these rules to accomplish a particular list automation task.

Rule	Triggered Event	Description
File format operation	• Import file • Send Campaign Group • Suppress file	Select an operator from the list. This is used to define the naming convention you're searching for on the remote FTP directory.
File name format	• Import file • Send Campaign Group • Suppress file	Specify the value of the file name you're searching for, depending on the operator you selected. For example, let's say you're looking for a CSV file that contains the word **Collections** in the file name. From the **File format operation** list, select the operator **Contains**, and then in the **File name format** box, type **Collections**. If, during the run, CX Contact sees a file that contains **Collections** in its name, it will grab the list and load it into CX Contact.
Append type	• Import file • Send Campaign	Specify how you want to upload records into CX Contact. Options are as follows: • New list only - a new listed is created

Rule	Triggered Event	Description
	Group • Suppress file	when the records are imported. • Append only - the imported records are added to an existing contact list. Duplicate records are always ignored. • Append and update - the imported records are added to the contact list. if CX Contact finds a duplicate record it overrides the existing record with the new record. • Flush and append - before the new records are imported into the contact list, the existing contact list is completely cleared. Important • Regardless of the append type, only one unique Client ID can exist in a contact list. You cannot have duplicate Client IDs in any contact list. • When the contact list being imported is appended to an existing contact list, its campaign group will inherit the current state of the existing campaign group that uses the existing contact list. For example, if Contact List A is running with Campaign Group A, and you're appending Contact List B (for Campaign Group B) to Contact List A, then Campaign Group B will automatically inherit the running status of Campaign Group A/Contact List A. • If, on the other hand, you import the new list as **New List Only**, the new campaign group that the new contact list belongs to will not inherit any running status. You will need to manually start the campaign group.
Suppression list	• Suppress file	Select the suppression list for the contacts being loaded into CX Contact.

Rule	Triggered Event	Description
		Related Documentation: Suppression Lists
Suppression List Channel	• Suppress file • Append type - New list only	Specify the channel (voice, SMS, or Email) that the suppression list applies to. Related Documentation: Suppression Lists
Upload rule (Optional)	• Import file • Send Campaign Group • Suppress file	Apply an upload rule to a contact list or suppression list being loaded into CX Contact. If you use an upload rule, the Specification file option is removed because upload rules already contain specification files. Related Documentation: List Rules
Use Specification file (Optional)	• Import file • Send Campaign Group • Suppress file	If you want to apply a specification file to a list being loaded into CX Contact, set the **Use Specification File** switch to the **On** position and select the specification file from the menu. This field will not apply if you've already applied a specification file to your upload rule. Related Documentation: Specification Files
Select Data Mapping (Optional)	• Import file • Send Campaign Group	If, instead of a specification file, you want to apply a data mapping schema to the list being imported, set the **Use Specification File** switch to the **Off** position. The **Select Specification File** menu changes to the **Select Data Mapping File** menu, where you can select and apply a data mapping schema. Related Documentation: Data Mapping
Use custom timezones	• Import file • Send Campaign Group	If you want to override the automatic system timezone assignment and instead use the entries you created in the time zone compliance section of CX Contact, leave the **Use custom timezones** option checked (this is checked by default). Related Documentation: Time Zone Assignment Options
Secure with encryption	• Import file • Send Campaign Group	To secure a Contact list or Suppression list with encryption, select the checkbox. When this option is selected, the system will accept input files encrypted with an asymmetric key using PGP Encryption.

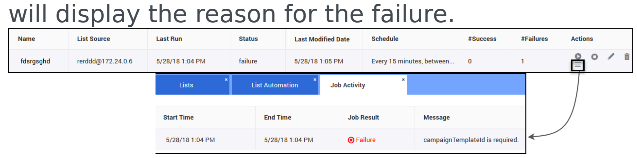
Rule	Triggered Event	Description
	• Suppress file • Export Analytics Data	Also, when this option is selected exported files will also be encrypted with an asymmetric key using PGP Encryption. Related Documentation: Security
Campaign Template	• Send Campaign Group	Select the campaign template that you will use when creating the Campaign Group. The campaign template contains the dialing and session profiles. Related Documentation: Campaign Groups
Specify Campaign Group name	• Send Campaign Group	Specify the name of the campaign group that will be created. Related Documentation: Campaign Groups
Campaign Group	• Export Contact List	• This option applies only if you select the Selected lists option for the Export Contact List action type. Then it becomes a mandatory field. • You can specify one, multiple, or all campaign groups. All contact lists associated with the selected campaign group(s) will populate in the Contact list(s) menu. • If the contact list you're looking for is not associated with a campaign group, select **No Campaign Group.** Only the contact lists NOT associated with a campaign group will populate in the Contact list(s) menu.
Contact list(s)	• Export Contact List	• This option applies only if you select the Selected lists option for the Export Contact List action type. Then it becomes a mandatory field. • All contact lists associated with the selected campaign group(s) will populate in this menu. If you select **All** campaign groups, for example, every contact list associated with a campaign group will populate in this menu. If you select **No Campaign Group**, only the contact lists NOT associated with a campaign group will populate in this menu.

Rule	Triggered Event	Description
Contact list name operation	• Export Contact List	If you select the By name option in order to specify the name of a contact list you want the system to export, select an operator that will correspond to the value in the Contact list name format field.
Contact list name format	• Export Contact List	Specify the value of the file name you're searching for, depending on the operator you selected. For example, let's say you're looking for a contact list that contains the word Collections in its name. From the Contact list name operation list, select the operator **Contains**, and then in the Contact list name format field, type **Collections**. The contact list containing the word Collections in its name will be exported to the FTP directory.
Selection rule	• Export Contact List	CX Contact can apply a selection rule to a list being exported and sent to a remote directory. Select a selection rule from the list and only the records that satisfy the selection rule condition(s) will be exported. Related Documentation: List Rules
Output file name format	• Export Contact List	If you apply a selection rule to the contact list export, you must specify an output file name. For a list of supported naming conventions, click the question mark next to the name of this field in CX Contact or refer to the List Rules page in this manual. Related Documentation: List Rules
Use label	• Export Contact List • Export Analytics Data	If you turn on the Use label option, the default field names will be replaced with the field names from the associated list label schema (that is, the names given by the user to better recognize and understand the field). For detailed information, refer to the Create and Manage User-defined Field Labels page.
Retention Period	• Suppress file • Append Type - New List only	This option indicates the amount of time for which the entries in the Suppression list should be maintained. A Retention period is mandatory and supports the following options: • Permanent • Today

Rule	Triggered Event	Description
		• 1 day - 31 day • 45 • 60 • 90 • 180 • 360 If a Retention period is not selected, Permanent is selected by default.
Data Source	• Export Analytics Data	Select the analytics data index that should be exported.
Time Interval	• Export Analytics Data	Select the time interval and time range at which analytics data should be exported.
Custom Time Interval	• Export Analytics Data	Select the time interval or time range according to days, hours and minutes.

View List Automation Job Details

When you create a new list automation job, the details and status of the job appear in a table on the Lists-->List Automation page. The table contains the following fields:

Property	Description
Name	The name of the list automation job.
List Source	Your username to the FTP directory and the FTP directory address. For example johnsmith@ftp.xyz.com.
Last Run	The date and time of the last completed job run.
Status	The current status of the job. If the status is failure, for example, click the Activity icon in the Actions menu. The Message field on the Job Activity page will display the reason for the failure. 
Last Modified Date	The date and time you created or modified the job.
Schedule	The scheduled start day and start and end time. If

Property	Description
	you used a Cron expression, the string is displayed here.
#Success	An accumulation of successful runs. For example, if the system finds and uploads a list on three runs, the number 3 will display in this field.
#Failures	An accumulation of failed runs. Examples of a failed run could include a failed connection to an FTP directory or a partial file transfer. It does not count or display the number of times the system executed a run but failed to locate a list matching the rule criteria.
Actions	From the Actions menu, you can do any of the following: • Run Now - Activates a run immediately. The originally scheduled run will still take place. • Disable List Automation - Stops all subsequent runs. Once you disable a list automation task, CX Contact automatically changes its status to Disabled and applies grey shading to the list automation entry. Note: Disabling a list automation doesn't delete the job from the job list. You can open and edit the job at any time to reschedule runs or hit the Play icon to restart it. • Edit List Automation - Click to edit the schedule, FTP options, or rules. • Delete List Automation - Deletes the job entirely. • Activity - See View Job Activity below for more information.

View List Automation Job Activity

From the Lists -> List Automation page, you can click Activity (document icon) to open the Activity page for that job. The following information displays for each run.

- Start Time - The start time of the last run.
- End Time - The end time of the last run.
- Job Result - The result of the run.
- Message - Displays associated messages for that job result.

Related Topics

- Upload Rules
- Selection Rules
- Suppression Lists
- Campaign Groups
- Specification Files

Create a Data Mapping Schema

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.

The data mapping feature is an alternative to using an input specification file to map contact data from an external file (input file) into CX Contact contact list fields. It eliminates the need to create and upload a detailed specification file, which is written using regular expression. Instead, all mapping can be defined in the CX Contact application.

The way you map data depends largely on the type of contact data file you're working with - whether it's a fixed position file or a delimited file.

This article explains how to create a data mapping schema for both file types and then describes how to apply the schema to a contact list being imported into CX Contact.

The page is broken down into sections:

- Define data mapping for a Fixed Position file
- Define data mapping from an imported file
- Define data mapping for a Delimited file

To get started, go to **Lists -> Data Mapping** and then select **New -> Data Mapping**.

The **New Data Mapping** page consists of two sections. On the left-hand side of the page, you'll provide key details about the contact list you're working with. On the right-hand side of the page, you'll define the mapping table for the data contained in the contact list.

Create a Data Mapping Schema for a Fixed Position File

In a fixed position file, all contact data contained in the file is output to a fixed-position field and each of these fields has a defined fixed length to determine the start and end character positions.

```
last_name    first_name    company     client_id    other1
Smith        John          Genesys     1000155      1000
Jones        Karen         Genesys     1000156      2000
Doe          Jane          Genesys     1000157      3000
```

Provide Details about the Contact List

On the left-hand side of the screen, provide key details about the contact list you're working with, as described in the table below.

Option	Description
Name	The name of the mapping schema you're creating.
Description	A description of the mapping schema.
For Import/For Export	Use **For Import**, which means the mapping schema you create applies to lists being imported into CX Contact. **For Export** is reserved for future use.
Caller ID Number	The caller ID number associated with the contact list.
File type	Options are **Fixed-length** and **Delimited**. For this task, select **Fixed-length**.
Header records	The header record count tells CX Contact where to look for the header row in a contact list that identifies the type of data stored in that column (first name, last name, phone number, etc.). By default, the count is set at 0, which is the first row of data in the header record. If you have a line space between a header row and the first row of data in the file, count that as a header row, because CX Contact will import all records below the defined header row position. In the example below, you would set the Header record count to 2, because you want to import all records starting from Row 3. System info : 10.10.16.50:8888 Date of Creation: 21/12/2018 Privalov 530-04-6211 +19256915237+16504661178 Redkin 780-89-9833 +16504661170+18129877833
Trailer record	The trailer record is often used to summarize data in a file - for example, the total number of records in the file, the total amount paid on accounts, etc. Setting the trailer record count allows CX Contact to exclude this information from being imported into the contact list. Simply specify the number of records from the bottom of the file you want to exclude.
Label set	If you select a labeling schema here, the labels defined in that labeling schema will populate in the **Label (Contact Field)** menu where you define the mapping (on the right-hand side of the screen). For

Option	Description
	more information about labeling schemas, go to the Field Labels page in this manual.
Sample File	You can import a fixed-position file that contains the contact data so that when you define the mapping, the data being mapped will display in the **Sample** field. **Important**: This option is enabled only after you define the mapping for at least one field.

Map the Data

To set up the mapping schema, click **New** or **New Multiple** and provide details about each field in your contact list, as described in the table below.

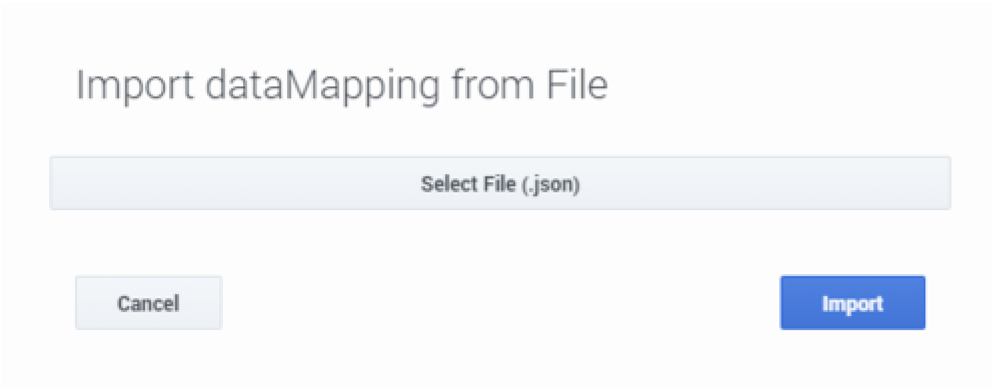
Option	Description
Type	The type of data being mapped. Currently, the **string** option is only available. All other options are reserved for future use.
Start	This is the starting position of each field within a row of data. The starting point is 0.
Length	The maximum number of characters allowed for that field.
Strict	Reserved for future use.
R/O	Reserved for future use.
Unique	Reserved for future use.
Label (Contact Field)	If you selected a labeling schema from the Label Set menu, the defined labels in that schema will populate here.

Define Data Mapping from an Imported File

When working with Data Mapping, you can import a Data Mapping file from a *.json export file.

To import a Data Mapping file, go to **Lists -> Data Mapping** and then select **Import** from the top right corner of the Data Mapping list. Select the relevant .json file and click **Import**. A new Data Mapping page appears and all of its properties are populated with data from the imported Data Mapping file.

You can edit the imported file before you click **Save** or **Save As**.



Create a Data Mapping Schema for a Delimited File

In a delimited file, columns are not confined to a pre-defined maximum length. Each record is one continuous line in the text file, with each field separated by a delimiter, such as a comma or a pipe.

```
last_name,first_name,company,client_id,other1
Smith,John,Genesys,1000155,1000
Jones,Karen,Genesys,1000156,2000
Doe,Jane,Genesys,1000157,3000
```

Provide Details about the Contact List

On the left-hand side of the screen, provide key details about the contact list you're working with, as described in the table below.

Option	Description
Name	The name of the mapping schema you're creating.
Description	A description of the mapping schema.
For Import/For Export	Use **For Import**, which means the mapping schema you create applies to lists being imported into CX Contact. **For Export** is reserved for future use.
Caller ID Number	The caller ID number associated with the contact list.
File type	Options are **Fixed-length** and **Delimited**. For this task, select **Delimited**.
Delimiter	Select the delimiter used in your contact list. Options are as

Option	Description
	follows: • Comma • Colon • Semicolon • Tab • Pipe • Custom - Specify a delimiter
Header records	A header record is the header row in a contact list that identifies the type of data stored in that column (firstName, lastName, etc). If you have a line space between a header row and the first row of data in the file, count that as a header row.
Trailer record	The trailer record is often used to summarize data in a file - for example, the total number of records in the file, the total amount paid on accounts, etc. Setting the trailer record count allows CX Contact to exclude this information from being imported into the contact list. Simply specify the number of records from the bottom of the file you want to exclude.
Use Header Record #	If your contact list has at least one header row, you must specify the line number in your contact list that contains the field headers (firstName, lastName, Device1, etc). For example, if you have three header rows, and your field headers are on the second header row, specify 2 in the **Use Header Record #** menu.
Select fields using	This allows you to map the fields in your contact list either by the contact list **Field Name** or the contact list **Field Number**. If you do not have a header row in your contact list, your only option here is to map by **Field Number**.
Label set	If you select a Label schema here, the labels defined in that labeling schema will populate in the Label (Contact Field) menu where you define the mapping (on the right-hand side of the screen). For more information about labeling schemas, go to the Field Labels page in this manual.
Sample File	You can import a delimited file that contains the contact data so that when you define the mapping, the data being mapped will display in the **Sample** field. **Important**: This option is enabled only after you define the mapping for at least one field.

Map the Data

To set up the mapping schema, click **New** or **New Multiple** and provide details about each field in your contact list, as described in the table below.

Notice that each field entry has an associated **Edit** (pencil) icon and **Delete** (trash can) icon so that you can easily modify or delete an entry.

Option	Description

#	This option is useful if you do not have a header row in your contact list and therefore cannot specify a field name. You simply identify the position of the data within the row of data in your contact list. The starting position in a row is 1. In the example below, the client ID is in the 4th position in each row, so you would enter a value of 4 in this field to map the client ID data.
	`Smith,John,Genesys,1000155,1000`
	`Jones,Karen,Genesys,1000156,2000`
	`Doe,Jane,Genesys,1000157,3000`

Field Name in File	This option is only available if you're identifying the fields to be mapped by their field names (meaning you selected **Field Name** in the **Select fields using** menu), which means your contact list has a header row containing field names. You can use this field in conjunction with the **#** field, but only the field name is mandatory.
Type	The type of data being mapped. Options are as follows: • string • boolean • numeric • phone • email • date • currency
Strict	Reserved for future use.
R/O	Reserved for future use.
Unique	Reserved for future use.
Label (Contact Field)	If you selected a labeling schema from the Label Set menu, the defined labels in that schema will populate here.

Once the data is mapped and you saved the schema, return to the main Data Mapping page to see a summary of the schema. This page includes the following details about each data mapping schema:

- Name - The name of the mapping schema.

- Description - The description of the mapping schema.
- Type - Whether the mapping applies to lists being imported or lists being exported. For now, the only option is Import.
- File Type - Whether the mapping is for a fixed-length file or a delimited file.
- Last Modified Date - The date the schema was last modified
- Created Date - The date the schema was created.
- Actions - Use this menu to do any of the following:
  - Edit - Click the pencil icon to open and edit the mapping schema.
  - Delete - Click the trash can icon to delete the mapping schema.
  - Duplicate - Click the document icon to duplicate the mapping schema. The new mapping schema will inherit all the properties from the original mapping schema.

Apply a Data Mapping Schema to a Contact List

When you upload a new contact list or edit an existing list, you can apply a data mapping schema to the list via manual upload or via List Automation.

Manual Upload

On the **New List** page (or **Edit List** page), turn the **Use Specification File** to the **Off** position.

The **Select Specification File** menu changes to the **Select Data Mapping** menu, where you select the data mapping scheme you want to apply to the contact list.

For more information about contact lists, refer to the Import and Manage Contact Lists page in this manual.

List Automation Tasks

When you create a list automation task that involves a list import (import file, send campaign group, import suppression file), you can apply a data mapping schema to the list being imported.

On the New **List Automation** page (or **Edit List Automation** page), go to the **Rules** section and turn the **Use Specification File** to the **Off** position.

The **Select Specification File** menu changes to the **Select Data Mapping** menu, where you select the data mapping schema you want to apply to the contact list.

For more information about List Automation, refer to the Create and Manage List Automation Tasks page in this manual.

Related Topics

- Import and Manage Contact Lists
- Create and Manage List Automation Tasks
- Create and Manage User-Defined Field Labels
- Import Specification Files

Import Specification Files

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.

If you don't want to apply a data mapping schema to a contact list being imported into CX Contact, you can use a specification file.

An input specification file (*.spc) is a text file used to identify the location of the fields in your data that are needed to populate your contact list. For example, if the First Name field starts at the seventh position in your data format, that information is included in the input specification file. Using the specification file, you can selectively extract some of the fields from your data while ignoring the ones you don't need. Here's an example:

```
# 5th Column (51st to 60th spot)
homePhone:s/^.{50}(\d{10})/$1/

# Columns 1, 2 and 3 to ClientID
ClientID:s/^(.{26})/$1/

# Work Phone
workPhone:s/^.{120}(\d{10})/$1/

# First Name to FirstName
firstName:s/^(.{60})/$1/

# Last Name to LastName
lastName:s/^.{60}(.{60})/$1/
```

The topics covered on this page are as follows:

- Import a specification file
- Specification file keywords
- Specification files and contact list database tables

Import a Specification File

Once you have created the specification file, use the following steps to import the file:

1. On the Specification Files page, click **New**.
2. In the Type field, leave the **Input** option.
3. Click **Select File** to locate the file on your PC or network. Input specification files must be text files with an spc extension.
4. Specify a name (required) and description (optional) for the specification file.
5. Click **Import Specification**.

> **Important**
> If you attempt to upload a specification file that is not formatted correctly, the system will return an error and the file will fail to upload.

All specification files appear in a table on the main Specification Files page. The table contains the following information for each specification file:

Name	The name of the specification file.
Description	A description of the specification file (if you provided one.
Type	The type of specification file. The default is Input.
Last Modified Date	The date the specification file was last modified.
Created Date	The date the specification file was initially imported.

Once you import a specification file, you can use the tools in the Actions menu to do any of the following:

Edit	Click the pencil icon to edit any of the specification file's properties.
Download	Click the download icon to download a specification file.
Delete	Click the trash can icon to delete a specification file.

Specification File Keywords

The following table lists specification file keywords and the corresponding contact list fields they map to.

Keyword	Contact List Field
• fname • first name • firstname	c_first_name
• lname • last name • lastname • name	c_last_name
• company	c_company
• other1-otherN	c_other1 (applies to other1-otherN)
• clientid • client id	c_client_id
• tz • time_zone • timezone	c_tz_uid
• zip • zip_code • zip code • postal_code • postal code	c_postal_code
• country • country_code • country code	c_country_code_iso
• state • region	c_state_code

Specification Files and Contact List Database Tables

If you use a specification file before uploading contact data into CX Contact and you use user-defined fields in the specification file, CX Contact will store the user-defined data for fields Other1-Other20 in the main calling list table, and it will store user-defined fields from Other21 and onward in the secondary table.

Here is an example specification file:

```
FirstName:s/<CSV>/$1/
LastName:s/<CSV>/$2/
ClientID:s/<CSV>/$3/
HomePhone:s/<CSV>/$4/
WorkPhone:s/<CSV>/$5/
CellPhone:s/<CSV>/$6/
Other1:s/<CSV>/$7/
Other2:s/<CSV>/$8/
Other3:s/<CSV>/$9/
Other4:s/<CSV>/$(10)/
Other25:s/<CSV>/$(11)/
Other28:s/<CSV>/$(12)/
```

That yields the following input file:

```
"John","Snow","540-18-4455","+16504661200","+19252381988","+14159873456","O1value","O2value","O3value","O4value
```

Now here are the contact list tables that are created from this file:

Resulting calling list tables:

```
outbound_22_30=> select record_id, c_last_name, c_first_name, c_client_id, contact_info, c_other1, c_other2, c_other3, c_other4, chain_id, chain_n from cc_list_153 order by 1;
 record_id | c_last_name | c_first_name | c_client_id | contact_info  | c_other1 | c_other2 | c_other3 | c_other4 | chain_id | chain_n
-----------+-------------+--------------+-------------+---------------+----------+----------+----------+----------+----------+---------
         1 | Snow        | John         | 540-18-4455 | +16504661200  | O1value  | O2value  | O3value  | O4value  |        1 |       0
         2 | Snow        | John         | 540-18-4455 | +19252381988  | O1value  | O2value  | O3value  | O4value  |        1 |       1
         3 | Snow        | John         | 540-18-4455 | +14159873456  | O1value  | O2value  | O3value  | O4value  |        1 |       2
(3 rows)


outbound_22_30=> select * from cc_list_153_ud;
 ud_id | ud_chain_id | ud_key  | ud_value
-------+-------------+---------+----------
     1 |           1 | Other25 | O25value
     2 |           1 | Other28 | O28value
(2 rows)
```

Related Topics

- Create a Data Mapping Schema

Search for and Manage Contacts

> **Important**
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> For the latest content and most recent updates, see the CX Contact Help on the Genesys Multicloud site.

Use the features in the List Details View page and/or the Contact Search page to browse a selected Contact List, optionally applying filtering rules, as well as to perform actions such as:

- Add a contact
- Find a contact

List Details View

Use the List Details View page to do the following:

- View records within a contact list.
- Search lists for a specific contact.
- Apply filters to a contact list to drill down into your data.

A summary of the number of contacts and devices is provided above the List Details View you. The summary includes the following information:

- Contacts in List – Indicates the number of contacts/unique customer records in the entire list.
- Devices in List – Indicates the number of devices in the entire list.
- Contacts in Filter – Indicates the number of contacts/unique customer records in the filtered list.
- Devices in Filter – Indicates the number of devices in the filtered list.

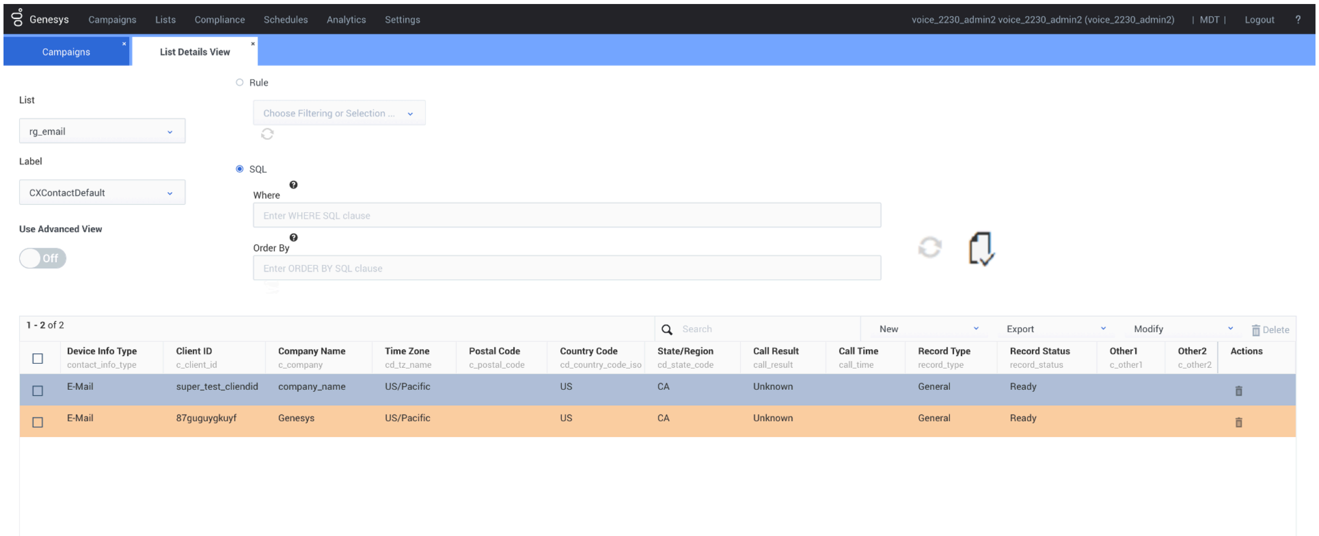
The table below describes the available List Details View options.

> **Important**

- All Filtering rules, and Selection rules (Contact and Advanced) are accessible from the **Rule** drop-down list. With this option you can apply previously created selection and filtering rules.
- The records in the List Details View are automatically color grouped. Each color represents a different customer. Since each customer can have more than one device, the colors enable you to view which records belong to the same customer.

Option	Description
List	Select the Contact List that you want to view.
Rule	Select the filtering rule that you want to apply to the selected contact list.
Refresh	Click Refresh to reload and update the selected Contact List.
Label	Select a label from the list provided to specify the Contact List type.
Use Advanced View	Turn Use Advance View on to view additional Contact List columns.
Export	The selected records will be exported. **Note:** • If you do not select one or more records all of the records will be exported to a **.csv** file. • When **order by** is applied to the contact list, the records in the exported **.csv** file will appear in the same order. • The Export to CSV option is disabled when the contact list is viewed as a **Secured** list.
SQL	Enables you to filter the list according to the following free-form SQL entries: • Where - Enter an SQL filtering expression to apply to the selected contact list. • Order By - Enter an SQL ordering expression to apply to the selected contact list. Click  to create a filtering rule from the List Details View. With this option you can test and validate SQL queries against uploaded contact lists and save the active query as a filtering rule for future use. **Note:** When you assign a name to the filtering rule, a selection rule is saved as <FilteringRule_name>_SelectionRule.
New	Select to create a new contact list record.
Modify	Select to modify the selected record.

To view the options described in the table above, click the following image to enlarge it.



Contact Search

Use the Contact Search page to do the following:

- View all contacts within a list - Leave the Last Name field empty and click **View Contacts**.
- Search for a single contact for a particular list - Type the first few letters of the last name in the Last Name box, select the list from the List menu, and click **View Contacts**.
- Add a new contact - Click **New Contact**.
- Delete a contact - Select the box next to the contact's name and then click the trash can icon.

Important

If a contact you're searching for has multiple devices, the search results will display a separate record for each device. For example, if a contact has three devices, the Contact Search results will return three separate results for the contact - one for each device.

For more information about contacts and contact lists, visit the Create and Manage Contact Lists page.

Compliance

Important

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Use this section of the user interface to set up and manage compliance tools and contact suppression lists.

Link to video

What do you want to do?

[+] Restrict contact attempts by using the following compliance tools:

- Attempt Rules
- Custom Timezones
- Location Rules
- Contact Times (by Region)
- Contact Dates

[+] Create or manage suppression lists

- View a suppression list
- Import a suppression list
- Export a suppression list
- Append a suppression file
- Add contacts to a suppression list
- Edit a suppression list
- Delete a suppression list
- Delete contacts within a suppression list

Compliance Tools

Important

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This article describes the compliance tools used to restrict contact attempts. The compliance tools include the following:

- Attempt Rules
- Custom Timezones
- Location Rules
- Custom Rules
- Contact Times
- Contact Dates

Attempt Rules

Use the **Attempt Rules** option to specify certain conditions that, when met, suppress a contact attempt. The following conditions can make up an Attempt Rule:

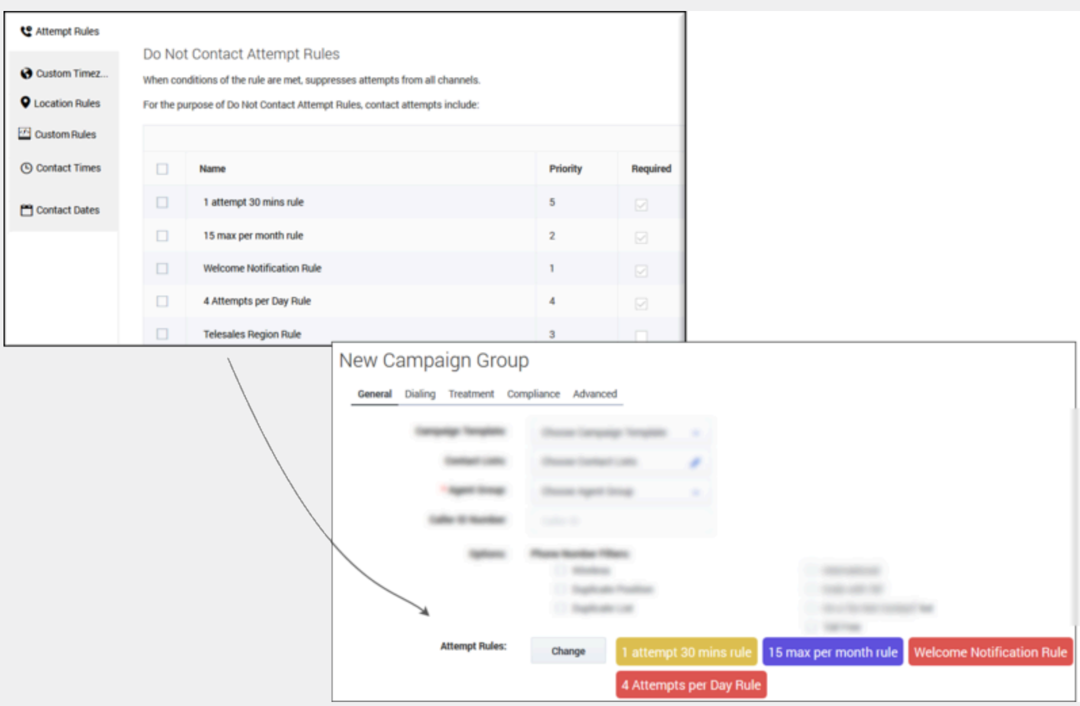
Required	Indicate whether the rule is **Required**. If a rule is **Required**, CX Contact will apply it to all new and existing campaigns, even ones that are currently running. If a rule is not **Required**, it is considered an **Optional** rule and must be manually applied to all applicable campaigns. You do this when you create or modify a new campaign template or campaign group. See the instructions below.
Priority	Set the priority of this rule. If you have multiple rules the priority value denotes the order in which the rules will be applied. A lower priority value indicates a higher priority, with 1 being the highest priority.
Rule Scope	Specify if the rule should be applied at the **Tenant**

	level or at the **Campaign Group** level.
Do Not Contact if	Fill in the values for the contact attempt rule. For example, *Do not contact if 4 Outbound attempts have been made in the last 5 hours.* Select **Today** when you want to count the attempts made today (after the last midnight) and select **In the last** when you you want to count attempts made in during a specific time.
Count By > Call Results	Define the attempt rule by call result status. By default, the following 12 call results are pre-selected. • Busy • No Answer • Answering Machine • Fax Detected • Overflowed • Abandoned • Dropped • Dropped No Answer • Silence • Answer • Wrong Party • Wrong Number Refer to the Call Results table on the Delivery and Retry Options page for a description of each call result.
Count By > Disposition Codes	Define the attempt rule by Disposition Code. For details refer to the Treatments based on Disposition Codes section in the Delivery and Retry Options page and the Dispositions section in the Administrator's Guide.
Contact Results	Select the call results that should be included as part of the Attempt Rules definition.
Count Attempts Using	Indicate whether to count previous attempts only: • To the same **Client ID**. • To the **Device**. • To the same **Client ID/Device** combination - for example, if two people share the same phone number but have different accounts, this option allows you to control attempts for each person. **Note:** When Device or ClientID/Device is selected, additional options will be presented, allowing you to target specific Device fields (including all Devices), and to also define a Device type.

	For example All Devices that are Mobiles enables you to control the number of attempts made to mobile phones.
To	Specify the location of previous attempts (that otherwise meet the conditions above) to count. If not specified, previous attempts to anywhere (using the current Client ID or Device, as specified above) are counted.
Count attempts between times	Indicates the number of outbound attempts that were made today during a specific time period. The Attempt rule will only count attempts made within the defined time period. Attempts made outside this time period will not be counted by this rule. **Note:** The **Start Time** and **End Time** options are only available when **Count attempts between times** is turned on. The Timezone source field is not editable. It is set within the campaign group settings.
Apply Disposition Code	Select a Disposition Code to be applied to the call attempt when the outcome is a negative rule check result. Treatment could be defined for this Disposition Code. If no Disposition Code is selected, Treatment can be applied to "Cancel Record" call result.

<table>
<tr>
<td>How to enable</td>
<td>
On the Attempt Rules tab, select New and specify the parameters as described in the table above.

The new rule will appear on the Attempt Rules page and it will populate in the Attempt Rules section when you create or edit a campaign object (dialing profile, campaign template, or campaign group).



</td>
</tr>
</table>

	Notice that you only see the Required rules, meaning that those are the rules that are automatically applied to all new and existing campaigns because you checked **Required** when you set up the rule. If you don't want to apply a **Required** rule to a campaign object, you must return to the **Compliance Tools** page and uncheck **Required** for that rule. You cannot deselect a **Required** rule when you create or edit the campaign object. If you want to add **Optional** rules (rules that weren't marked as **Required**) to the campaign object, click **Change** and select the rules from the list. The **Optional** rules will appear alongside the **Required** rules. You can click the **X** next to the name of any **Optional** rule to remove it. 

Edit, Delete, or Duplicate an Attempt Rule

On the main **Attempt Rules** page, use the **Actions** menu next to any Attempt rule to do any of the following:

- Edit - Click the pencil icon.
- Delete - Click the trash can icon.
- Duplicate - Click the document icon. The **Duplicate Attempt Rule** dialog box opens with the settings from the original rule populated. You can change any or all of them. If you do not change the name of the Attempt rule, it will inherit the name of the original Attempt rule, with **_duplicate1** appended to it.

Custom Timezones

Use the **Custom Timezones** option to assign a timezone to phone numbers containing a specific country code, area code, and optionally exchange. For example, you can assign the EST timezone to all national rate phone numbers.

How to enable	• Option 1: On the **Custom Timezones** tab, click **New** and then specify the country code, area code, exchange code, and timezone that should be applied. If the exchange code is not specified, "any exchange code" is assumed. • Option 2: On the **Custom Timezones** tab, click **From file** to import a CSV file containing a list of timezones that should be applied. This file does not require any headings, and once the file is imported into CX Contact, each record from the file will appear as a separate entry in the list of custom timezones.

Edit or Delete Custom Timezone Rules

On the main **Custom Timezones** page, use the **Actions** menu next to any rule to edit or delete the rule:

- Edit - Click the pencil icon.
- Delete - Click the trash can icon.

Location Rules

Location rules suppress contact attempts based on the location of a contact or device.

Each Location rule is made up of the following attributes:

Name	The rule name must be unique within the account and rule type, and may contain letters, digits, hyphens, and underscores, and spaces.
Required	Specify if this is a **Required** rule. If a rule is **Required**, CX Contact will apply the rule to all new and existing campaigns, even ones that are currently running. If a rule is not **Required**, it must be manually applied to all applicable campaigns. You do this when you create or modify a campaign object. See the instructions below for more information.
Priority	Set the priority of this rule. If you have multiple rules the priority denotes the order in which the rules will be applied. A lower priority value indicates a higher priority, with 1 being the highest priority.
Determine location by	The location of the attempt may be based on the **Device** or the **Contact**.
Do not contact locations	Specify the locations that should be suppressed: • Country and Regions - For each Country and Region you can select the Type and Number of the devices to be suppressed, or you can suppress all types and/or all device numbers. • Timezones - CX Contact will look for the specified timezone to determine the location. For each Timezone you can select the Type and Number of the devices to be suppressed, or you can suppress all types and/or all device numbers. • Country codes - CX Contact will look for the specified country to determine the location. For

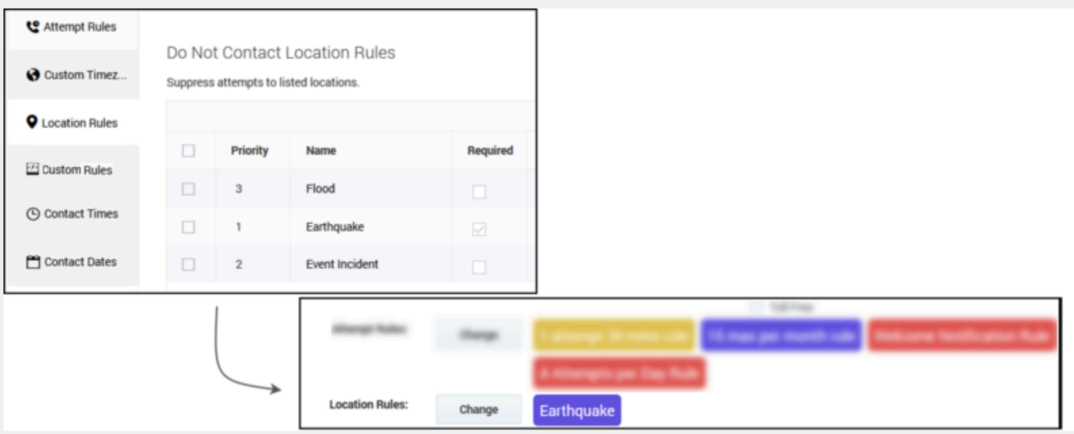
	each Country code you can select the Type and Number of the devices to be suppressed, or you can suppress all types and/or all device numbers. • Area codes (appears only if you selected **Device** in the **Determine location by** field) - Press the **New** button to specify one or more area codes for which you want to define suppression rules. Enter the area codes, separated by commas. CX Contact will look for the Device's area code to determine the location. For each Area code you can select the Type and Number of the devices to be suppressed, or you can suppress all types and/or all device numbers. • Postal codes (appears only if you selected **Contact** in the **Determine location by** field) - Press the **New** button to specify one or more postal codes for which you want to define suppression rules. Enter the postal codes, separated by commas. CX Contact will look for the contact's postal code to determine the location. For each Postal code you can select the Type and Number of the devices to be suppressed, or you can suppress all types and/or all device numbers. **Note:** The postal code can include an asterisk (*****) that acts as a wildcard (that is, zero or more instances of any character). • Anywhere - CX Contact suppresses all contacts, regardless of location. You can select the Type and Number of the devices to be suppressed, or you can suppress all types and/or all device numbers. **Note:** Selecting **All Types** and/or **All Devices** will completely suppress dialing.
Devices	Select the devices to which you want to apply the Location rule. • All Devices (automatically marks all device numbers 1 to 10) • All Types (automatically marks all device types) • Device1... Device10 • Mobile • Landline • International • Ends with '00'

- Ends with '000'
- Non-Geographic
- Contains an extension
- On a 'Do Not Contact' list (US/UK only)
- Duplicated device in Position
- Duplicated device in List
- Duplicated device in Contact
- Voip phone

How to enable

On the **Location Rules** tab, select **New** and specify the location attributes as described above.

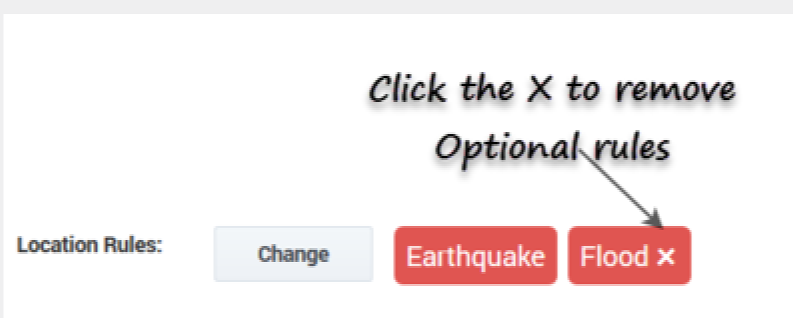
The new rule will appear on the **Location Rules** page and it will populate in the **Location Rules** section when you create or edit a campaign object.



Notice that you only see the Required rules, meaning that those are the rules that are automatically applied to all new and existing campaigns because you checked **Required** when you set up the rule.

If you don't want to apply a **Required** rule to a campaign object, you must return to the **Compliance Tools** page and uncheck **Required** for that rule. You cannot deselect a **Required** rule when creating or editing a campaign object.

If you want to add **Optional** rules (rules that weren't marked as Required) to the campaign template or campaign group, click **Change** and select the rules from the list. The **Optional** rules will appear alongside the **Required** rules. You can click the **X** next to the name of any **Optional** rule to remove it from that campaign template or campaign group.



Edit, Delete, or Duplicate a Location Rule

On the main **Location Rules** page, use the **Actions** menu next to any Custom rule to do any of the following:

- Edit - Click the pencil icon.
- Delete - Click the trash can icon.
- Duplicate - Click the document icon. The **Duplicate Location Rule** dialog box opens with the settings from the original rule populated. You can change any or all of them. If you do not change the name of the Location rule, it will inherit the name of the original Location rule, with **_duplicate1** appended to it.

Custom Rules

Use the **New Custom Rule** option to create a rule that will allow or deny outbound dialing according to a user-defined Java Script expression evaluated for each outbound call immediately before dialing occurs. A custom rule enables you to implement customized business rule logic.

Important

Useful functions when creating custom compliance rules include:

- AttemptsOnDevice - Indicates the number of attempted interactions from a specific device.
- AttemptsOnContact - Indicates the number of attempted interactions from a specific contact.

For example, `!($GSW_STATE_CODE == CA && AttemptsOnDevice(24H, [Answer, Abandoned, Overflowed, ...]) > 1)`

Each Custom rule is made up of the following attributes:

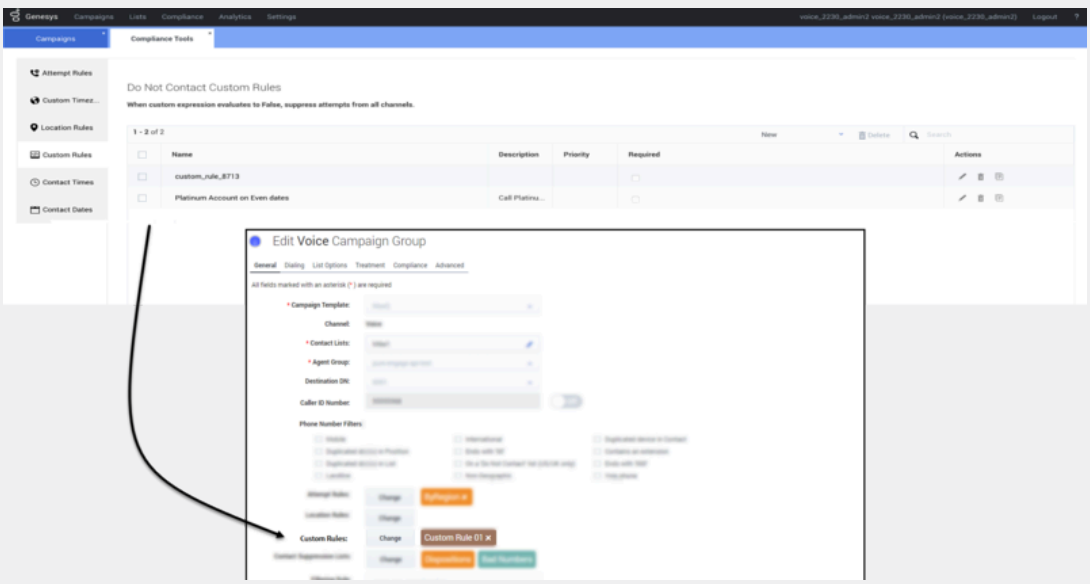
Name	The rule name must be unique within the account and rule type, and may contain letters, digits, hyphens, and underscores, and spaces.
Required	Specify if this is a **Required** rule. If a rule is **Required**, CX Contact will apply the rule to all new and existing campaigns, even ones that are currently running. If a rule is not **Required**, it must be manually applied to all applicable campaigns. You do this when you create or modify a campaign group. See the instructions below for more information.
Priority	Reserved for future use. Editing this parameter will not yield any results in CX Contact.

Description	Enter an optional explanation of the purpose of the custom rule.
Custom Expression	Enter a Java Script expression that evaluates the conditions for a True or False outcome. True allows the dial to occur. False does not allow the dial to occur. **Note:** You can refer to the user data values attached to the call using: `$<user data key name> in expression`. For example: `($Other15 !== 'Platinum' || new Date().getDate() % 2 === 0)`.
Apply Disposition Code	Select a Disposition Code to be applied to a call attempt, when the outcome of the call attempt is a negative rule check result. A treatment can be defined for the Disposition Code. If a Disposition Code is not selected, the "Do Not Call" call result treatment may be applied.

How to enable

On the **Custom Rules** tab, select **New** and specify the custom rule attributes as described above.

The new rule will appear on the **Custom Rules** page and it will populate in the **Custom Rules** section when you create or edit a campaign group.



Notice that you only see the Required rules, meaning that those are the rules that are automatically applied to all new and existing campaigns because you checked **Required** when you set up the rule.

Edit or Delete Custom Rules

On the **Custom Rules** page, use the **Actions** menu next to any rule to edit or delete the rule:

- Edit - Click the pencil icon.
- Delete - Click the trash can icon.
- Duplicate - Click the document icon. The **Duplicate Custom Rule** dialog box opens with the settings

from the original rule populated. You can change any or all of them. If you do not change the name of the Custom rule, it will inherit the name of the original Custom rule, with **_duplicate1** appended to it.

Contact Times

Use the **Allowed Contact Times** option to define allowable calling windows for each day of the week for a given region for a specific set of devices. Contact attempts to your contacts in those regions will be limited to the time frame you define on each day, regardless of your contact center hours and campaign time frames. For example, if you have campaigns running from 8AM to 9PM local time, and you restrict attempts in New York to 9AM to 7PM, no attempts will be made to anyone in New York until 9AM, and they will end at 7PM.

To enable Contact Times by region:

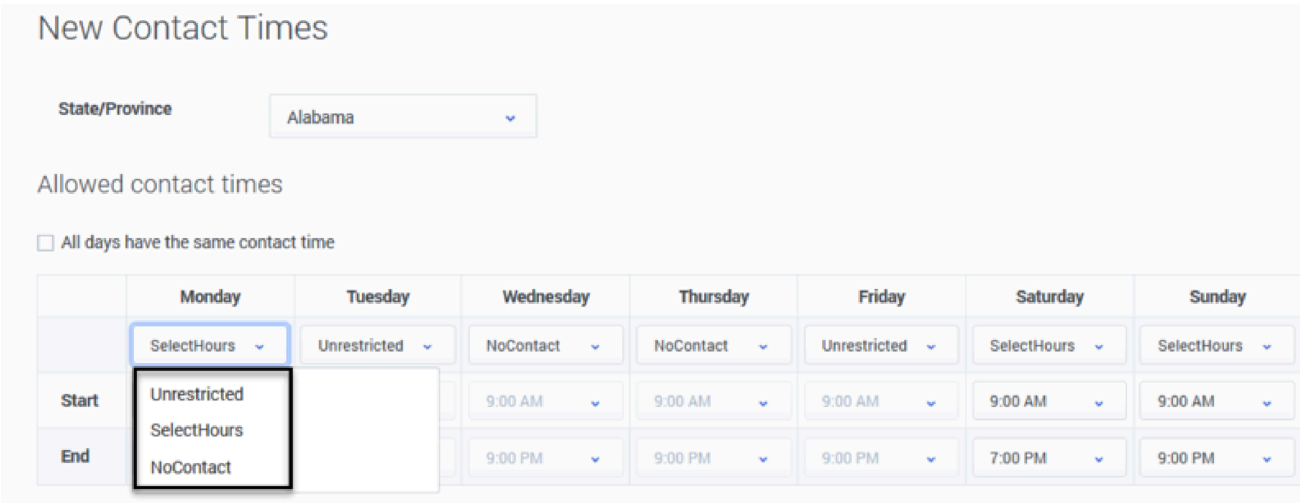
1. Select the **Contact Times** tab.
2. Select **New > Contact Time** and configure the following:

Option	Description
Name	The Contact Time name.
Required	Select Required to apply the Contact Time rule to all Campaign Groups.
Priority	Set the priority of this rule. If you have multiple rules the selected priority denotes the order in which the rules will be applied. A lower priority value indicates a higher priority, with 1 being the highest priority.
Country	Select the target country for this rule or select “Any Country” to apply this rule regardless of the country being contacted.
Region/State/Province	Select one or more Regions, States or Provinces for this rule. If not selected all regions/States/Provinces for this country will be applied to this rule.
Devices	Select one or more devices associated with this new rule. **Note: Any Device** can only be selected when no other device was selected.
Device Type	Select one or more of the following devices. **Note: Any Device Type** can only be selected when no other device was selected. • Any Device Type • Mobile • Landline

	• International • Ends with '00' • Ends with '000' • Non-Geographic • Contains an extension • On a 'Do Not Contact' list (US/UK only) • Duplicated device in Position • Duplicated device in List • Duplicated device in Contact • Voip phone
Timezone Source	Indicates the timezone source.
Apply Disposition Code	Select a Disposition Code to be applied to a call attempt when the outcome is a negative rule check result If a Disposition Code is not selected, Treatment can be applied to the "Cancel Record" call result.
Strict	Select one of the following: • ON - Records matching the rule criteria are not attempted until the time window is open. • OFF - Records are attempted regardless of the time window and are blocked for dialing during the pre-dial validation step if the rule check is negative.
Allowed Contact Times	The following types of restrictions are available for any given region: • **Unrestricted** - allows contact attempts to occur in accordance with the start and end time specified for that Campaign Group. • **Select Hours** - allows you to explicitly define the hours for making contact attempts for that day. If for example, you are restricting contact attempts from 9AM to 7PM, select 9AM from the Start menu, and select 7PM from the End menu. • **No Contact** - When you select this option, no contact attempts will be made to the affected region on the specified day. **Note:** When **Strict** is enabled **All days have the same contact time** is enabled and cannot be unselected.

Tip

If each day of the week will have the same allowable contact times, check **All days have the same contact time** when creating the new rule.



Edit or Delete Contact Times Rules

On the *Allowed Contact Times by Country and Region/State/Province*' page, use the **Actions** menu next to any rule to edit or delete the rule:

- Edit - Click the pencil icon.
- Delete - Click the trash can icon.

Contact Dates

Use the **Do Not Contact Dates** option to specify a date in which contact attempts cannot take place. This will apply to any device in the account and will be effective for 24 hours (midnight to midnight, local to the device).

Important

Changes to **Do Not Contact Dates** are refreshed by CX Contact every minute. If a Do Not Contact Date is defined for the current day, all dialing for that day will stop in one minute or less.

How to enable	On the **Do Not Contact Dates** tab, add a Label (for example Christmas Day) and select the associated date (for example December 25).

Delete Contact Dates Rules

You cannot edit a **Contact Dates** rule - the only option is to delete the existing rule and create a new one with a different date or label. To delete the rule, check the box next to the rule name and click the trash can icon.

Related Topics

- Timezone Assignment
- Create and Manage Suppression Lists
- Import Specification Files

Manage Suppression Lists

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.

Suppression lists contain contact information for those who do not want to be contacted.

Key features of a suppression list:

- Suppress contacts by Device - specify one single device or multiple devices for a contact
- Suppress contacts by Client ID
- Set an expiry date for a suppressed contact
- Use a single suppression list for multiple campaign groups

Use the **Compliance -> Contact Suppression Lists** page to do any of the following:

- View a suppression list
- Import a suppression list
- Export a suppression list
- Append a suppression file
- Add contacts to a suppression list
- Suppression via Email and SMS Opt-out
- Edit a suppression list
- Delete a suppression list
- Clear a suppression list
- Delete contacts within a suppression list
- Call treatments and suppression

View a Suppression List

When you go to the **Compliance** menu and select the **Contact Suppression Lists** page, you'll see a list of all available suppression lists and their associated details, as follows:

Name	The name of the suppression list.
Size	The number of lines in the original input file.
Channel	Indicates the channel (voice, SMS, or Email) that the suppression lists applies to.
Use	The number of campaigns to which the suppression list is associated.
Required	Indicates if the suppression list is mandatory or optional.
Expires	Indicates the length of time that the suppression list remains active.
Type	Indicates whether the suppression occurs by **Device** or by **Client ID**.
Secured	Indicates if the Suppression list was PGP encoded before it was imported/exported.
Retention	Indicates the amount of time for which the entries in the Suppression list should be maintained. A Retention period is mandatory. If a Retention period is not selected, Permanent is selected by default.

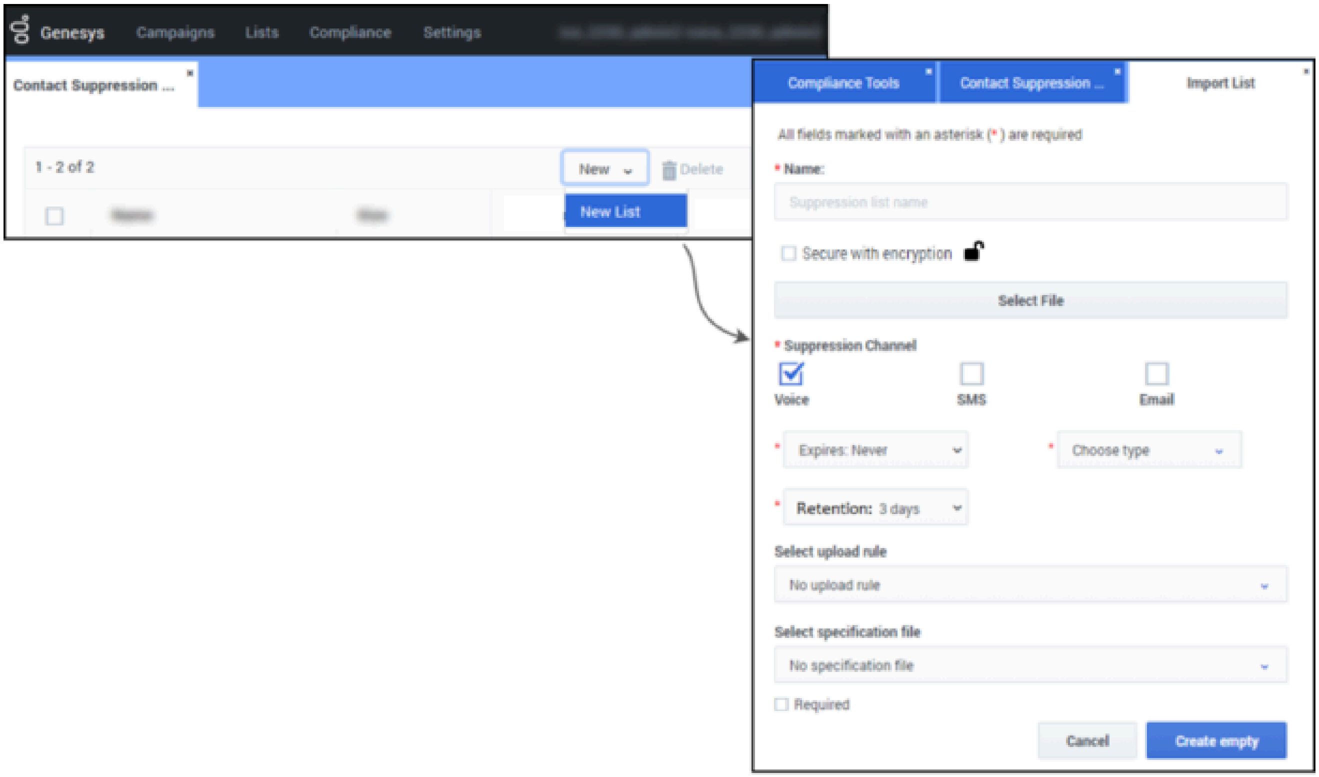
If you want to view the details of an individual suppression list, click the box next to its name and select the Edit icon from the **Actions** menu.

Import a Suppression List

To import a new suppression list, click **New ->New List** from the **Contact Suppression Lists** page.

Important

Supported file formats for contact lists and suppression lists are described on the Contact List Formats and Fields page.



The following options are available:

Name	Specify a name of the suppression list.
Secure with encryption	To use a secure with encryption, select the checkbox. When this option is selected, the system will accept input files encrypted with an asymmetric key using PGP Encryption. Also, when this option is selected exported files will also be encrypted with an asymmetric key using PGP Encryption.
Suppression Channel	Indicate whether the suppression list applies to the Voice, SMS, or Email channel. Once the Suppression List is created, the channel type is fixed and cannot be changed.
Expires	Indicate when the suppression list should expire. Click **Never** to keep the suppression list indefinitely.
Type	Indicate whether the suppression occurs by **Device** or by **Client ID**.
Upload Rule (Optional)	If you want to apply an existing upload rule to the list, select the upload rule from the list. **Note:** The upload rule being applied to the suppression list can contain a selection rule but not splitting criteria.
Specification File (Optional)	Select from the list of available specification files. See notes about specification files below.

Required	Indicate if this suppression list is **Required** for all campaign groups. All **Required** suppression lists will automatically populate when you create a dialing profile, campaign template, or campaign group (on the General tab). You will need to manually add the **Optional** suppression lists (ones that are not marked as **Required**). 
Append Type	Specify how you want to upload the records into CX Contact. The options are as follows: • Append and update - The imported records are added to the suppression list. If CX Contact finds a duplicate record it overrides the existing record with the new record. • Append only - The imported records are added to an existing suppression list. Duplicate records are always ignored. • Flush and append - Before the new records are imported into the suppression list, the existing contact list is completely flushed.
Retention	Indicates the amount of time for which the entries in the Suppression list should be maintained. A Retention period is mandatory. If a Retention period is not selected, Permanent is selected by default.

Next, click **Select File** to import the suppression list. You'll then see a record count to the right of the screen, with a preview of the records being imported.

Specification Files

Keep the following in mind:

- To import a CSV file without using a specification file, you may need to first edit the original file to include a header row with field names that match the CX Contact field names.
- If you used a specification file, you may need to edit it so that it extracts the data correctly. If the mappings are incorrect, modify the contact list or input specification file and re-import the data.

For more information about specification files, go here.

Manage a Suppression List

To manage existing suppression lists, you'll use the **Actions** menu on the main **Contact Suppression Lists** page. A description of each task follows.

Export a Suppression List

When you export a suppression list, a CSV file is retrieved from the CX Contact database that contains all records in the list.

To export a suppression list, on the **Contact Suppression Lists** page, select a suppression list, click **Export** and select **Download**.

Append a Suppression File

If you have a file that includes contacts you want to add to an existing suppression list, use the **Append File** feature, as follows:

On the **Contact Suppression Lists** page, go to the **Actions** menu for that list and select **Append File**.

All suppression list options appear here, including the **Append Type**. The **Append** options are listed in the table above.

Add Contacts to a Suppression List

If you want to add contacts to a suppression list, rather than append a new file, go to the **Actions** menu for that list and select **Add Records**.

Then enter either the list of Devices or Client IDs, depending on the list type.

> **Important**
>
> - When adding new Devices, you must follow the accepted phone number format because CX Contact is not set up to reject improperly formatted phone numbers.
> - When adding new Client IDs, be sure to enter them exactly as they appear in the database - include the leading zeros and match the case.
> - If you manually add records to a suppression list, the records remain indefinitely, until the suppression list expires.

Suppression via Email and SMS Opt-out

When a contact uses the Opt-out or Unsubscribe option within a text message or email, the record is automatically added to a contact suppression list, called CXContactSMSOptOut and CXContactEmailOptOut, respectively. These suppression lists have the following characteristics:

- The type is set to **Device**
- The suppression list is set to **Required**
- The suppression list **Never expires**.
- The suppression list cannot be deleted.

Clear a Suppression List

If you want to remove all contacts from a list but keep the file in CX Contact, on the **Contact Suppression Lists** page, go to the **Actions** menu for that list and select **Clear List**.

Edit a Suppression List

To edit an existing suppression list, on the **Contact Suppression Lists** page, select the suppression list and click the pencil icon from the **Actions** menu. All suppression list options appear here. You can edit any of these fields, excluding **Name** and **Type**.

> **Important**
> If you replace the existing suppression file with a new one, you must choose an **Append Type**, as described in the Append a suppression file section above.

Delete a Suppression List

To delete an existing suppression list and the contacts within it, go to the **Actions** menu for the list, click the trash can icon, and select **Delete List**.

Delete Contacts within a Suppression List

To delete specific contacts within a suppression list, go to the **Actions** menu for the list, click the trash can icon, and select **Delete Record/s**.

Enter a list of Client IDs or Devices, depending on the type of suppression list, that you want to remove from the suppression list.

View Suppression List Import Activity

To view the import activity for a specific suppression list, go to the **Actions** menu and select the **Activity** icon. This opens a new page that displays the following information about the suppression list import:

- The start and end time of the import
- The number of lines in the original input file
- The number of records that were rejected.
- The status of the import (failure or success)
- A message indicating why an import has failed. If the Import Result is Success, nothing displays in this field.

Call Treatments and Suppression

A record can be added to a suppression list as part of a call treatment. Refer to the Delivery and Retry Options page for more information.

Related Topics

- Compliance Tools
- Contact List Formats and Fields
- Import a Specification File
- Treatments - Delivery and Retry Options

Schedules

> **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.

CX Contact (CXC) **Schedules** is a powerful tool that enables you to execute one or more Campaign Groups automatically and periodically using a predefined schedule. Each Schedule can include one or more Campaign Groups that are not necessarily associated with the same campaign, group and so on. Multiple schedules can be configured and active in the same Outbound Contact Server (OCS) instance.

Schedules simplifies configuration by enabling you to define the activation and deactivation time for all the Campaign Groups that operate frequently and have recurring usage (for example, every weekday at 8 am).

While numerous Campaign Groups can be configured to be active/inactive at the same time, each Campaign Group within the schedule can be individually configured for activation/deactivation.

> **Important**
> In the future CX Contact will include Sequence Campaign Groups that support Time in State and Statistical Value. With these conditions you will be able to define that when one campaign group achieves a 90% penetration status Campaign Group 2 begins.

Key Features

- Schedule a Campaign Group to start/finish.
- Schedule a Campaign Group to run for a specified period of time or until a specific statistic is achieved.
- Sequence Campaign Groups. For example, it can be defined that when one campaign group achieves a 90% penetration status Campaign Group 2 begins.

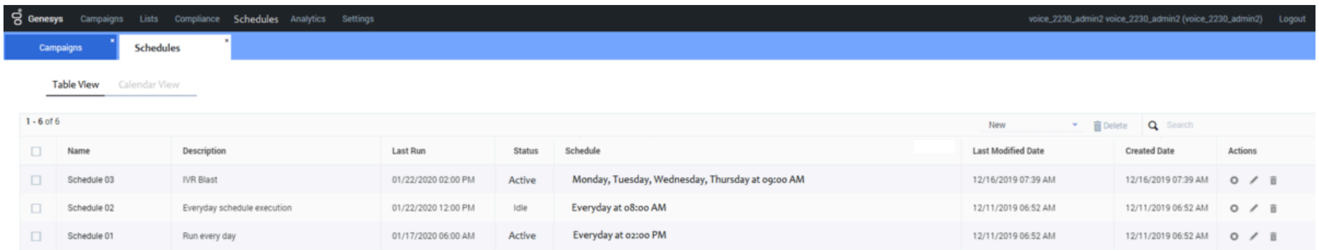
Work with Schedules

- Create or Edit a Schedule - Learn how to setup and organize when one or more Campaign Groups begin and end.
- Schedules Dashboard - View the activity history associated with one or more Campaign Groups.

Important

You can access and customize near-real time reporting data about Schedules from the Schedules Dashboard.

Click the **Schedules** menu to open the **Schedules** page. The following image depicts a typical Schedules page.



Related Topics

- Create or Edit a Schedule
- Schedules Dashboard
- Create a Campaign Group

Create / Edit a Schedule

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.

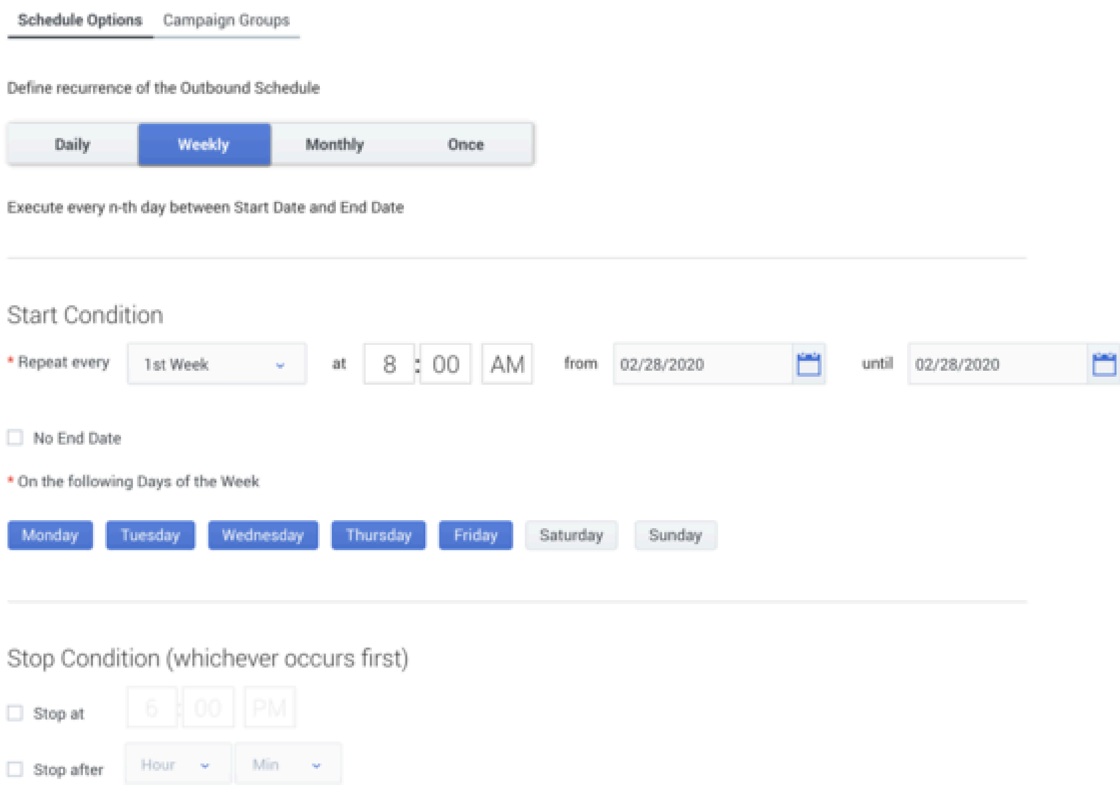
CX Contact Schedules allow you to create and run one or more Campaign Groups automatically and periodically using a predefined schedule. Use the instructions below to create a schedule.

Important

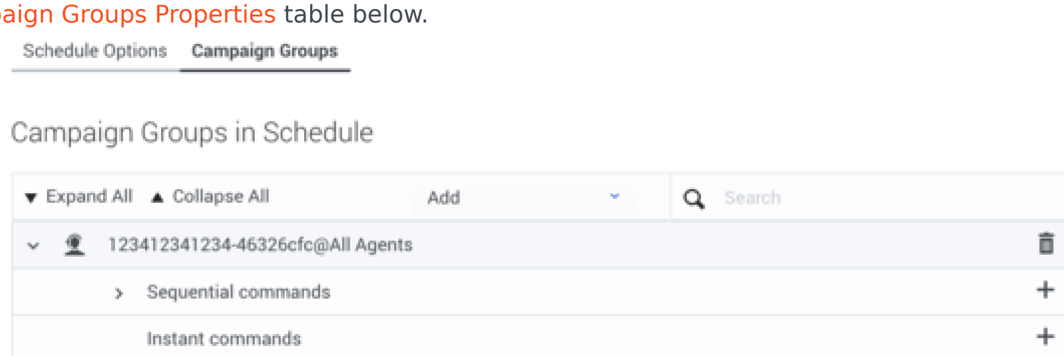
- You can access and customize near-real time reporting data about Schedules from the Schedules Dashboard.
- In the future a Calendar View option will be available. The Calendar View will display all of the existing schedules on the day on which the schedule should start.

Create / Edit a Schedule

1. Click the **Schedules** menu. The Schedules list appears. For details see the Schedules List Properties table below.
2. Select your preferred view.
    - **Table View** - Lists all of the existing schedules.
    - **Calendar View** - Displays all of the existing schedules in the day on which they are scheduled to start.
3. Select **New** to create a new schedule or click the name of the schedule you want to edit.
4. Select the **Schedule Options** tab and set the available options. The options in the Schedule Options tab enable you to define when the Campaign Groups associated with the schedule will be run. For details see the Schedule Options Properties table below.

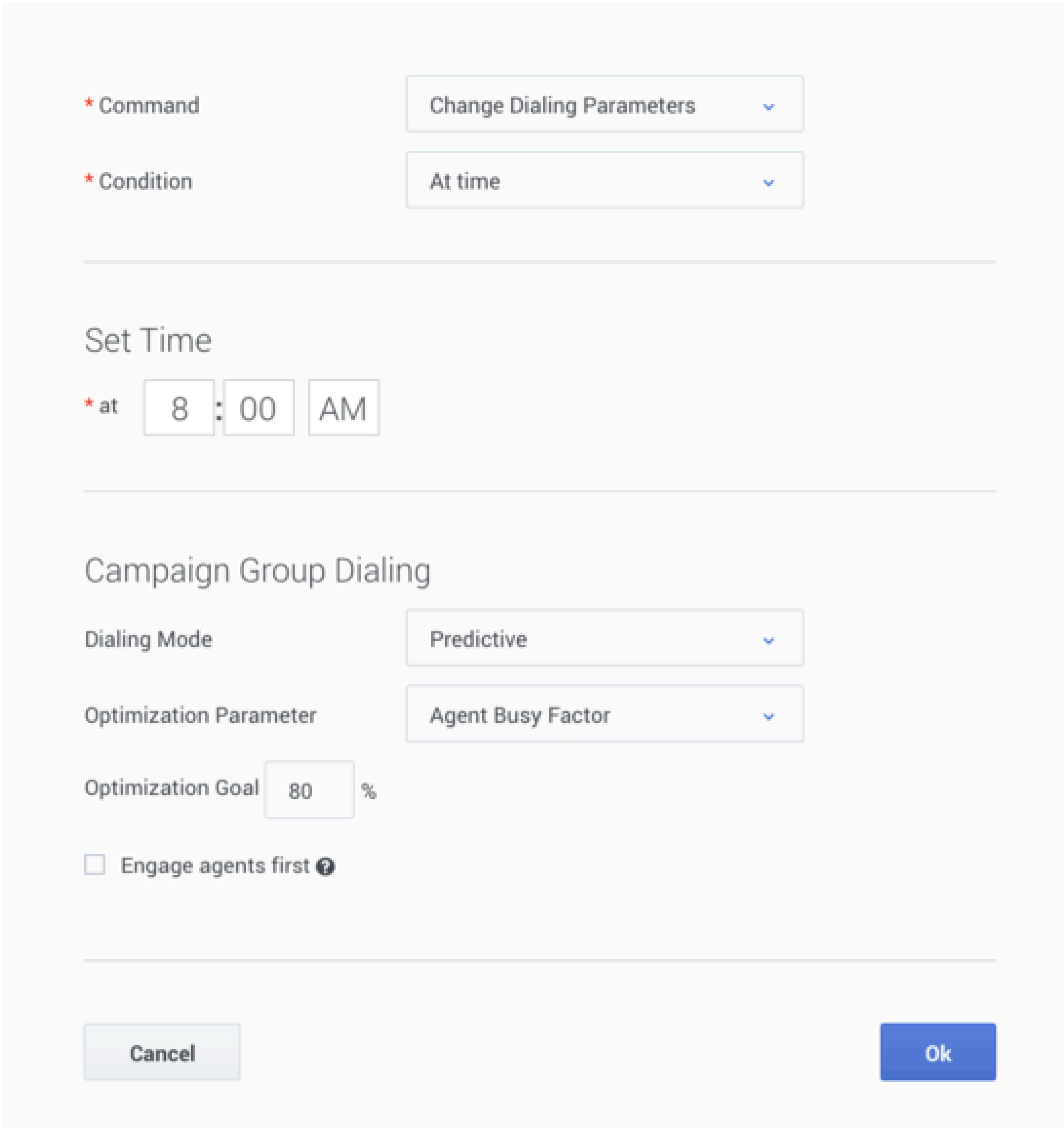


5. Select the **Campaign Groups** tab and select the Campaign Groups to which this schedule should be applied. When the schedule is run the selected Campaign Groups are activated. For details see the Campaign Groups Properties table below.



6. Select the **Campaign Group Dialing** panel and configure the following options:
    - **Change Dialing parameters** - Change the Campaign Group's pacing parameters.
    - **Force Stop** - Force the Campaign Group to be unloaded.
    - **Start** - Load the Campaign Group.

- **Start Paused** - Pause the Campaign Group.
- **Stop** - Unload the Campaign Group.



7. Click **Save Schedule**.

Schedules List Properties

Column	Description
Name	Schedule name.
Description	Provides information about the purpose of the schedule.
Last Run	The last time and date the schedule was activated.
Status	• **Active** - Campaign groups associated with the specific schedule are currently running. • **Idle** - The schedule is active but is not being used. • **Disabled** - Campaign groups associated with the specific schedule are not active.
Schedule	A plain text description of the Schedule activation rules.
Last Modified Date	The last date and time the schedule was edited.
Created Date	The date and time the schedule was created.
Actions	• **Enable** - Instructs the system to run the schedule at its configured date and time. • **Disable** - Stops all subsequent runs. **Note:** Disabling a schedule doesn't delete the schedule. You can open and edit the schedule at any time to reschedule runs or hit the Play icon to restart it. • **Delete** - Removes the schedule from the system.

Schedule Options Properties

Column	Description
Name	Schedule name.
Description	Provides information about the purpose of the schedule.
Daily / Weekly / Monthly / Once	Indicates the type of recurrence and defines the view of the Schedules Dashboard where you can view reports on Outbound Schedules.
Start Condition	Indicates the date and time interval at which you would like the schedule to be activated.
Stop Condition	Indicates the time the schedule will end.

Campaign Groups Properties

Column	Description
Name	Schedule name.
Description	Provides information about the purpose of the schedule.
Add	Enables you to add an existing Campaign Group. • **Channel** - Select a Channel for the Campaign Group. For details see CX Contact Channels. • **Campaign Group** - Select one Campaign Group associated with the selected Channel. When a new Campaign Group is added it automatically contains an empty Instant command and two Sequential commands: • **Load immediately** • **Start immediately**
×	Enables you to delete a command / Campaign Group from the schedule.

+	Enables you to add / edit a command to the Campaign Group. The add/edit Campaign Group command requires you to configure the following options:
	• **Command** - Select the visibility of the **Campaign Group Dialing** panel.
	• **Condition** - Select when the command should be active with relation to the Set Time configuration.
	  ◦ **Immediately** - Indicates that the command will be activated when the Schedule is run.
	  ◦ **At time** - Indicates that the command will be activated at the configured Set Time.
	  ◦ **After** - Indicates that the command will be activated after the configured Set Time interval.
	  ◦ **Time in state** - Indicates that the command will be activated at the configured Set Time interval and state.
	  ◦ **Statistical value** - For future use.
	  ◦ **Time in state** - For future use.
	• **Campaign Group Dialing** - Enables you to determine when and how the campaigns associated with the schedule places calls.

Column	Description
	• **Dialing Mode** - For details refer to Dialing Modes. • **Optimization Parameter** - For details refer to Optimization Parameters. • **Optimization Goal** - Enables you to set your desired Campaign goal. • **Engage agents first** - Select this option to change the current Dialing mode to Predictive with Seizing or Progressive with Seizing before an Outbound call is made. For details refer to IVR Modes.
↓ ↑	Enables you to the command up / down one step in the sequential execution line.
Repeat	Enables you to define a repeat interval for the Instant command.

Related Topics

- Schedules
- Schedules Dashboard
- Create a Campaign Group

CX Contact Analytics

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.

CX Contact (CXC) Analytics is a powerful tool that enables you to obtain an extensive and detailed understanding about CX Contact processes. With a series of different dashboards, CX Contact Analytics offers a variety of visualizations and in-depth reporting panels that highlight specific aspects of Jobs, Calls, SMS/Emails, Campaigns and so on.

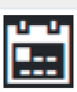
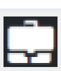
Key Features

- **Almost Real-Time Reporting** - As soon as an event occurs, CXC Analytics can start to use the resulting data to build reports.
- **Custom Time Period** - Data extraction that enables you to view how processes are performing over time.
- **Advanced Filtering Options** - Enables you to pinpoint specific data.

Design your Dashboard

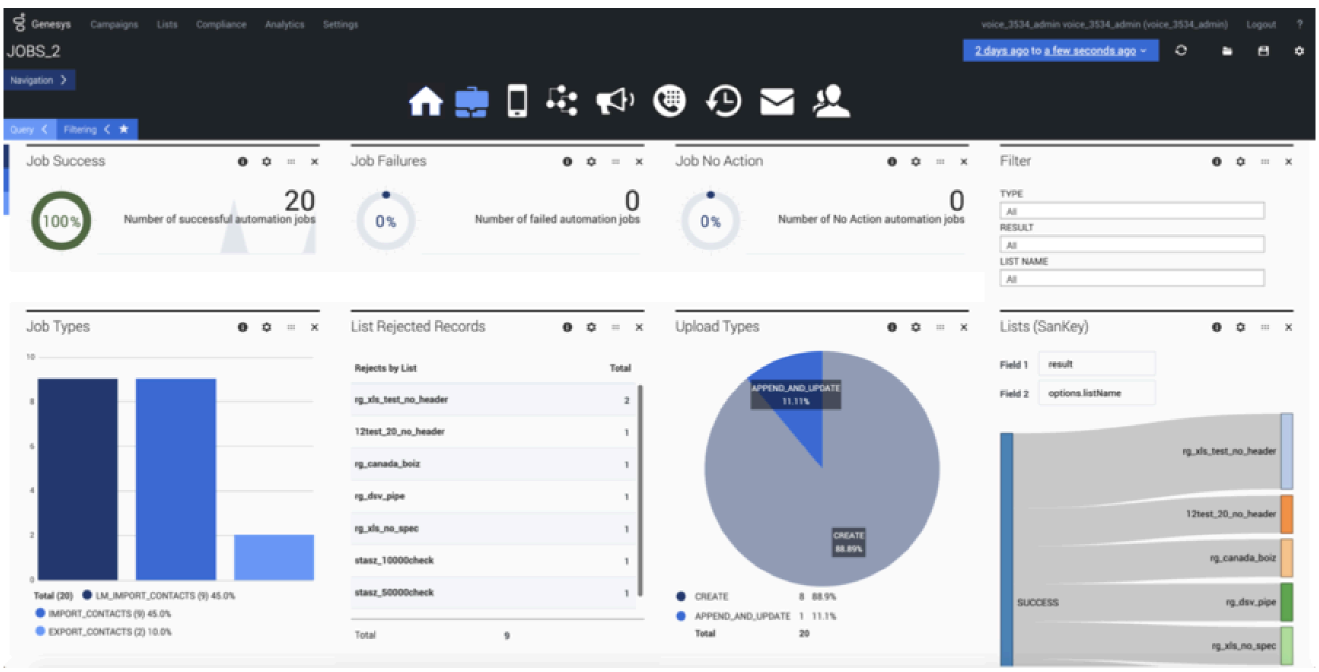
- Configure a Dashboard - Provides details about how to design the dashboard to generate the data you want.
- Configure a Dashboard Row - Provides details about how to organize and set up the dashboard row.
- Create an Analytics Dashboard Panel - Provides details about how to add and configure a dashboard panel.

Use the following options in the Analytics tab to create custom dashboard views.

Dashboard Icon	Name	Description
	Outbound Schedules Dashboard	Contains data about a Schedule's status and its results.
	Job Record	Contains data about a Job's status and its results.
	Device Import Detail Records	Contains data about Device Import Detail Record results.

	Preloading Record	Contains data about numbers that were removed from one or more Call Lists.
	Campaign Group Event Record	Contains data about the status of a Campaign group.
	Call Result Record	Contains data about call attempts.
	Contact History Record	Contains statistical and contact data about call attempts.
	SMS/EMAIL Record	Contains data about SMS/EMAIL events.
	User Actions	Contains data about user events (that is, who did what and exactly when).

Click the **Analytics** menu to open the Analytics page. The following image depicts a typical Analytics page.



Related Topics

- Configure a Dashboard
- Configure a Dashboard Row
- Create an Analytics Dashboard Panel

Configure a Dashboard

> **Important**
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The Configure Dashboard window contains 5 tabs that enable you to determine how the specific Analytics dashboard should be viewed and what information should and should not be included.

Configuration of the Configure Dashboard window is specific to each dashboard. For example, if you open the Configure Dashboard window in the User Actions dashboard, select Editable in the General tab and click Save, Editable will only be selected for the Users Action dashboard.

For details about each tab in the Configure Dashboard window, refer to one or more of the following sections:

- General
- Labels
- Rows
- Time Settings
- Fields formatting

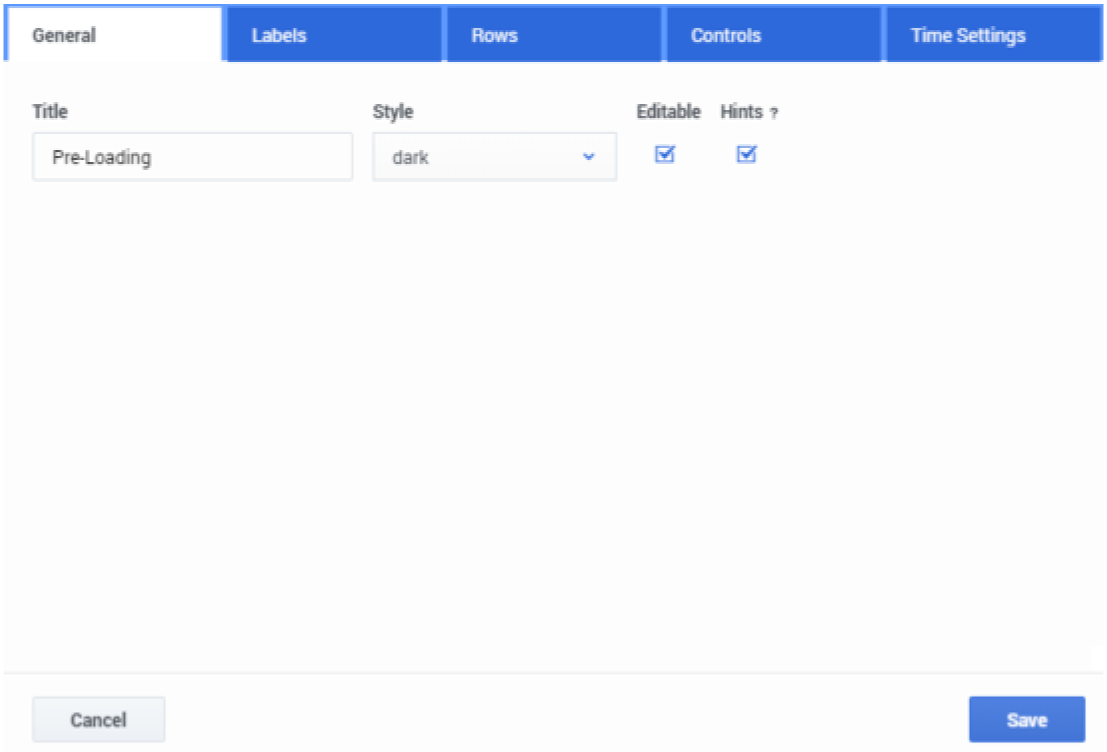
> **Important**
> When configuring the Configure Dashboard window, you must click **Save** to ensure that your changes are not lost.

To open the Configure Dashboard window, select the **Analytics** menu and click the Configure Dashboard icon  in the top right corner of the Analytics screen.

General

In the Configure Dashboard > General tab (see image below) you can change one or more of the following options:

Parameter	Description
Title	The dashboard title.
Style	Reserved for future use.
Editable	Enables you to lock the specific dashboard so that it cannot be changed in the future.
Hints ?	Reserved for future use.

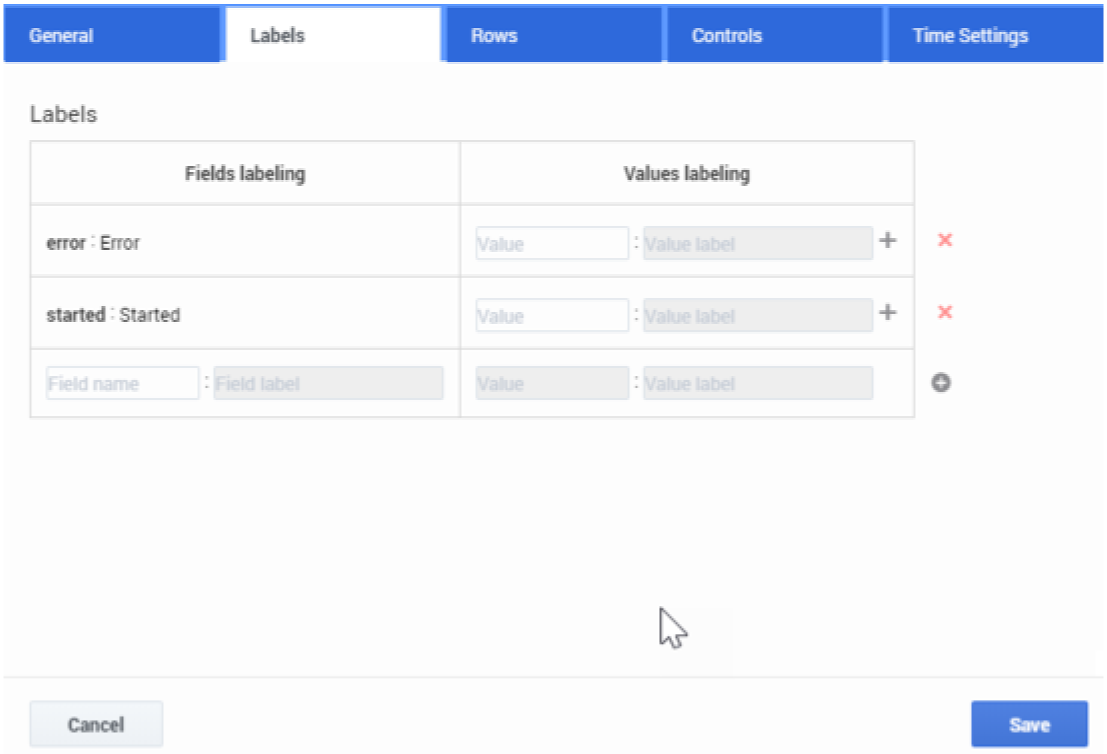


Labels

In the Configure Dashboard > Labels tab (see image below) you can change the default name of each field (that is, the Label name) to a name with a meaning that you can easily understand.

Change a field name

1. Type the field name in the **Field Name** text box. A list of fields with the letters you typed appears.
2. Select the field whose name you want to change.
3. In the Field label text box type the new name for the selected field and click the **Add new field** icon .
4. Click **Save**.



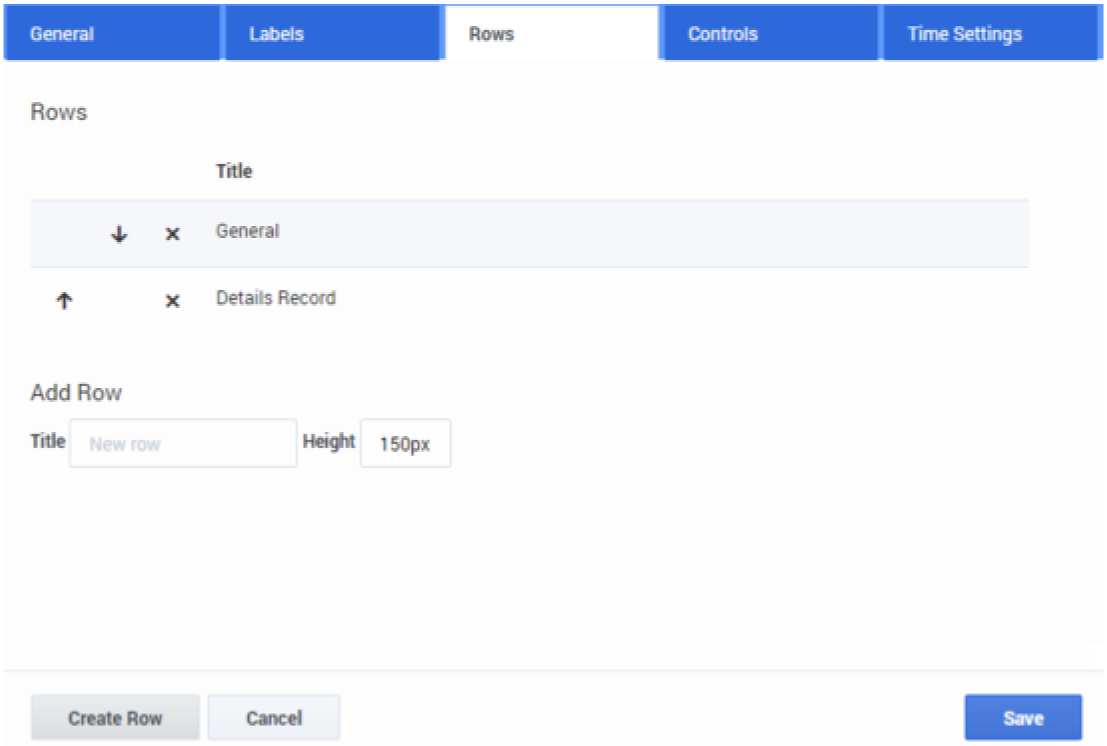
Rows

In the Configure Dashboard > Rows tab (see image below) you can add and/or remove dashboard rows. The dashboard row enables you to control the specific dashboard layout with height and row order configuration options.

Add / Remove a Dashboard Row

1. Type the name of the new dashboard row and enter a row height.
2. Click **Create Row**.
3. Click **Save**.

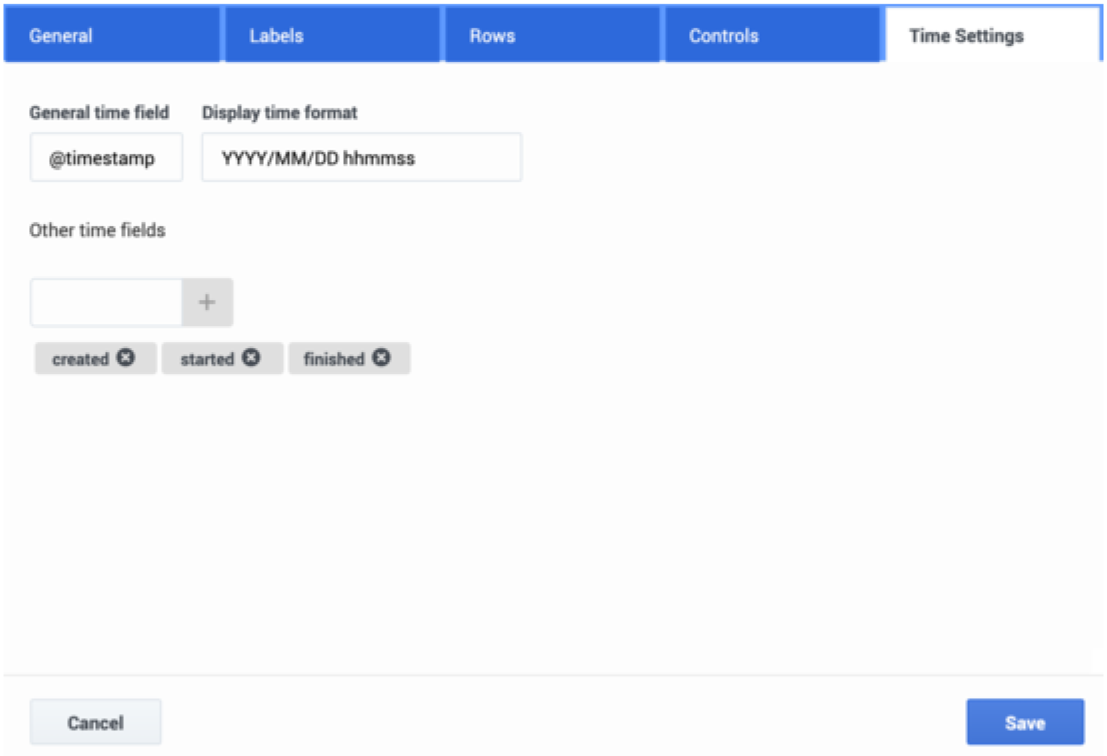
> **Important**
>
> To delete a dashboard row click the Delete row icon ✕ next to the name of the row. To change the location of each row in the dashboard, click the up or down arrow ↑ ↓ associated with the row you want to move.



Time Settings

In the Configure Dashboard > General tab (see image below) you can change one or more of the following options:

Parameter	Description
General time field	The primary field that contains the time stamp.
Display time format	The time format you wish to see displayed. For example, YYYY/DD/MM, or hhmmss, and so on.
Other time fields	Select optional time fields to be displayed in the format selected in Display time format.

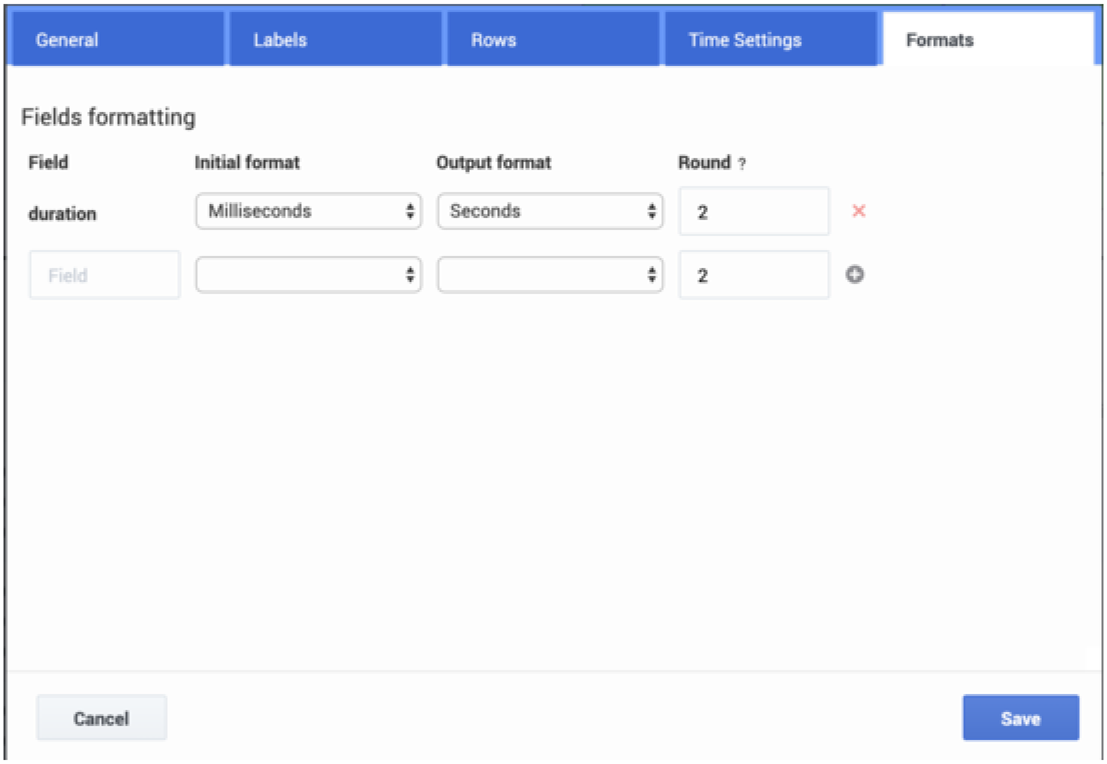


Fields formatting

In the Configure Dashboard > Fields formatting tab (see image below) you can add and/or remove time and duration rows. Each row enables you to control the time and duration format that appears in the user interface.

Change a field format

1. Type the field name in the **Field** text box. A list of fields with the letters you typed appears.
2. Select the field whose format you want to change.
3. In the **Initial format** select the format you want to change.
4. In the **Output format** select the new format.
5. In the **Round** text box enter the number of decimal points that can appear for the selected Output format.
6. Click **Save**.



Related Topics

- Configure a Dashboard Row
- Create an Analytics Dashboard Panel

Import / Export a Dashboard and Panels

Important

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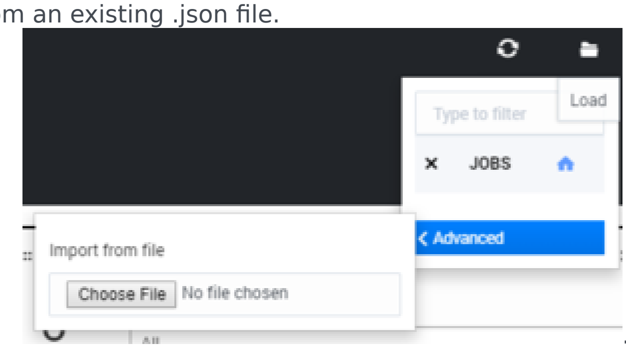
For the latest content and most recent updates, see the CX Contact Help on the Genesys Multicloud site.

CX Contact Analytics dashboards can be imported/exported. The imported/exported file is a **.json** file. The dashboards can also be manually exported as a **.pdf** file and a dashboard panel can be manually exported as a **.csv** file.

Import an Analytics Dashboard

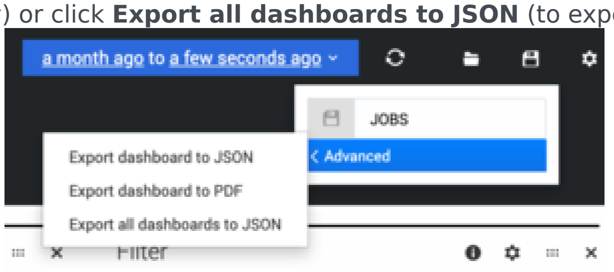
1. Select **Analytics** and click the **Load** icon .
2. In the **Type to filter** text box type the name of the dashboard you want to load. A list of dashboards matching the name appears. Or, click **Advanced** and then click **Choose file** to import dashboard data from an existing .json file.



3. Select the **.json** file containing the dashboard data you would like to import. The data in the select .json file is uploaded as the current dashboard.

Export an Analytics Dashboard

1. Select **Analytics**.
2. Open the dashboard whose data you would like to export to a **.json** file and click the **Save** icon .

3. Click **Advanced** and then click **Export dashboard to JSON** (that is, to export the current dashboard only) or click **Export all dashboards to JSON** (to export all dashboards from all indexes).


4. Select a location for the .json file and click **Save**.

Manually Export a Dashboard as a PDF file

1. Select **Analytics**.
2. Open the dashboard whose data you would like to manually export to a **.pdf** file and click the **Save** icon .
3. Click **Advanced** and then click **Export dashboard to PDF**.
4. Select a location for the .pdf file and click **Save**.

Manually Export a Dashboard Panel as a CSV file or PDF File

1. Select **Analytics**.
2. Open the dashboard whose panel you would like to manually export to a **.csv** or **.pdf** file.
3. Click the download **Export** icon .
4. Select either the **Export panel to CSV** tab or the **Export panel to PDF** tab.
5. Review the details in the window that appears and click **Download CSV / Download PDF**.

Configure a Dashboard Row

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In each Analytics dashboard you can create one or more rows. The dashboard row enables you to control the specific dashboard layout with height and row order configuration options.

To configure a dashboard row:

1. Hover over the three small blue rectangles to the left of the row you want to configure and when the options appear click the Configure row option 

.
2. In the **General** tab, configure following options:
   - Title - The name of the row.
   - Height - The row height.
   - Editable - Enables you to lock the specific dashboard so that it cannot be changed in the future.
   - Collapsable - Select Collapsable to enable the Collapsable Row option.
3. In the **Panels** tab, delete, move, and/or hide the existing panels.
4. In the **Add Panel** tab, create a new panel for the selected row. For details about creating a new panel refer to the Create an Analytics Dashboard Panel page.
5. Click **Save**.

Related Topics

- Configure a Dashboard
- Create an Analytics Dashboard Panel

Create an Analytics Dashboard Panel

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Within each Analytics Dashboard you can add and configure one or more panels. A panel can be configured to highlight specific information about Jobs, Calls, SMS/Emails, Campaigns and so on.

- Create an Analytics Dashboard Panel
- Configure an Analytics Dashboard Panel
- Panel List

Create an Analytics Dashboard Panel

For example purposes, performing the following steps will create a panel with information about job results.

1. Click **Analytics** and select the dashboard to which you want to add a new panel.
2. Scroll to the bottom of the screen and click **ADD A ROW**. Refer to Configure a Dashboard Row for details about how to organize and set up the row.

   > **Important**
   > You do not have to add a new row to create a new dashboard panel. The same options are available for an existing row.

3. On the left side of the row, hover over the three blue rectangles and select **Add Panel**.
   

4. Select the **General** tab and enter a title and height for the new panel.

5. Select **Editable** to lock the specific dashboard so that it cannot be changed in the future
6. Select **Collapsable** to enable the Collapsable Row option.
7. Select the **Add Panel** tab and from the **Select Panel Type** list select the type of panel you want to create. An assortment of fields and parameters appear.
8. Configure the fields and parameters and click **Save".**

> **Important**
> Every panel can have different fields and parameters and subsequently different tabs and a different amount of tabs. Refer to the Panel List section below for details about each panel.

Configure an Analytics Dashboard Panel

1. Click **Analytics** and select the dashboard containing the panel you want to change.
2. In the top right corner of the panel click **Configure** icon .
3. In the **General** tab configure one or more of the following options.
   Title - The panel name.

   Span - Enables you to define the panel width.

   Editable - Enables you to lock the specific dashboard so that it cannot be changed in the future.

   Inspect - Select Inspect to view the Last Elasticsearch Query. When enabled, the Inspect icon appears in the top right corner of the panel.
4. In the **Panel** tab configure the available options. For details about each option refer to the Panel List table below.
5. In the **Queries** tab you can add conditions (that is, a customized query that is applied to the panel).

Panel List

Panel Name	Description
aggstable	The aggstable panel is a table with aggregation by field or time period. This table represents the count of events, aggregated (grouped) according to a specified field or according to a time range. Each cell in the aggstable table includes an events (documents) count for the Vertical Field value and the Horizontal Field value. ”**[+]**

<table>
<tr><th>Panel Name</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Title</td><td>The panel name.</td></tr>
<tr><td>Span</td><td>The number of columns (1 to 12) the panel will occupy.</td></tr>
<tr><td>Editable</td><td>Shows/hides the panel configuration button.</td></tr>
<tr><td>Inspect</td><td>Shows/hides the panel Inspect button. For example, when the Inspect button is turned on, the Elasticsearch query associated with the specific panel appears.</td></tr>
<tr><td>Terms mode</td><td>• terms_agg – Contains the unique specified field (Vertical field option) value for data grouping and the event count according to the Horizontal field in each row.
• times_agg – Contains the unique specified field (Vertical field option) value for data grouping and the event count according to the selected Time Interval in each row.</td></tr>
<tr><td>Horizontal Field</td><td>terms_agg mode only - Divides each row into columns according to the unique values in the field.</td></tr>
<tr><td>Time Field</td><td>times_agg mode only - Determines the events timestamp. By default this value is the same value for Time Field in the Dashboard settings.</td></tr>
<tr><td>Time Interval</td><td>times_agg mode only - Hour, day, week, month or year can be set for a count calculation for a period of events. By default this value is set to an “hour”.</td></tr>
<tr><td>Vertical Field</td><td>Used to aggregate (group) documents and divide the table into rows according to the unique value in this field.</td></tr>
<tr><td>Column Title</td><td>The heading of the first column.</td></tr>
<tr><td>Max Rows Count</td><td>The number of maximum table rows.</td></tr>
<tr><td>Show Percentages For all Field(s)</td><td>Adds the percentage from the total row count to each cell.</td></tr>
<tr><td>Show Percentages Only</td><td>Enables you to show only percentages in each cell.</td></tr>
<tr><td>Total only</td><td>Enables you to show only the total of each column.</td></tr>
<tr><td>Queries</td><td>Enables you to add filters only related to this panel.</td></tr>
<tr><td>Filters</td><td>Enables you to add filters only related to this panel.</td></tr>
</table>
</td></tr>
<tr><td>Audittable</td><td>The Audittable panel supports the filtering of multiple values in each column. That is, ASC/DESC column and a detailed view of the row when it is clicked. [+]</td></tr>
</table>

<table>
<tr><th>Panel Name</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Title</td><td>The panel name.</td></tr>
<tr><td>Span</td><td>The number of columns (1 to 12) that the panel will occupy.</td></tr>
<tr><td>Editable</td><td>Show/hides the panel configuration button.</td></tr>
<tr><td>Time Field</td><td>Determines the events timestamp. By default this value is the same value for Time Field in the Dashboard settings.</td></tr>
<tr><td>Rows per page</td><td>The maximum number of rows that can be shown on single page.</td></tr>
<tr><td>Local Time</td><td>Enables you to adjust the time field t the browser's local time.</td></tr>
<tr><td>Columns</td><td>A list of all the possible column options in the table.</td></tr>
</table>
</td></tr>
<tr><td>Customtable</td><td>
The Customtable panel is a table in which the columns contain mathematical expressions and links to other columns. [+]
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Title</td><td>The panel name.</td></tr>
<tr><td>Span</td><td>The number of columns (1 to 12) that the panel will occupy.</td></tr>
<tr><td>Editable</td><td>Show/hides the panel configuration button.</td></tr>
<tr><td>Local Time</td><td>Enables you to adjust the time field t the browser's local time.</td></tr>
<tr><td>Rows per page</td><td>The maximum number of rows that can be shown on single page.</td></tr>
<tr><td>Aggregate Mode</td><td>• Enabled - Each row in the table includes a set of documents grouped according to the Aggregate Field values.
• Disabled - Includes a row for each document in the database.</td></tr>
<tr><td>Aggregate Field</td><td>Enables you to aggregate (group) documents and divide the table into the number of rows specified in this field.</td></tr>
<tr><td>Show Count</td><td>Adds a Count column to the table with the number of documents that were grouped in each row. For example, listName (an aggregate field) will include the number of operations provided for each list.</td></tr>
</table>
Create a new column
1. Type a title for the new column (“New Column Title” input)
</td></tr>
</table>

Panel Name	Description

	2. Select the column mode:
	• Count – Total number of documents.
	• Sum – The sum of the fields values.
	• Link – The value of the other custom column created within the custom table.
	• Avg – The average of fields values.
	• Agg Time Diff – An aggregated count of documents within the defined duration of time specified between 2 time fields.
	  • Minuend – The time field from which another time (subtrahend) will be subtracted.
	  • Subtrahend – The time field to subtract from the minuend.
	  • Operator – The condition type that should be set for the period size.
	  • Period size – The duration in minutes or seconds.
	• Own Value (only available when aggregate mode is disabled) – A field value for each document.
	• Time Diff (only available when aggregate mode is disabled) – The duration between 2 time fields for each document.
	  • Minuend – The time field from which another time (subtrahend) will be subtracted.
	  • Subtrahend – The time field to subtract from the minuend.
	• Format – The format of the displayed result. You can create any number of fields with a difference of two time fields and specify the desired format for each of them. You can also specify the timestamp (milliseconds) as the format. To do this, enter **timestamp** or **x** in the **format** input If you want the result to be displayed in the time format accepted for the dashboard, leave the field empty.
	3. Click **Add Block** to enter the configuration into the source field.
	At this stage, additional field calculations can be applied (for example, COUNT of CallResults answer + COUNT of CallResults busy)
	4. Click the **Save Column** icon.
	Columns can be ordered by using the Move arrows.
	5. Save the panel.
	
	Important
	Click the eye icon in the top right corner under **Actions** to hide/show the specific column.
	
	Expressions writing
	An expression should begin with a number, parentheses or “data block” and cannot start with a mathematical operator. An expression should not contain letters. Math operators can be inserted using

<table>
<tr><th>Panel Name</th><th>Description</th></tr>
<tr><td></td><td>the keyboard or using an operators block located under expression area.</td></tr>
<tr><td>ddfilter</td><td>The ddfilter panel enables you to create a custom filter for each user. [+]
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Title</td><td>The panel name.</td></tr>
<tr><td>Span</td><td>The number of columns (1 to 12) that the panel will occupy.</td></tr>
<tr><td>Editable</td><td>Show/hides the panel configuration button.</td></tr>
<tr><td>Inspect</td><td>Shows/hides the panel Inspect button. For example, when the Inspect button is turned on, the Elasticsearch query associated with the specific panel appears.</td></tr>
<tr><td>Filter Field</td><td>The name of the field that should be used for filtering.</td></tr>
<tr><td>Filter Title</td><td>Filter name.</td></tr>
<tr><td>Queries</td><td>Enables you to add filters only related to this panel.</td></tr>
<tr><td>Filters</td><td>Enables you to add filters only related to this panel.</td></tr>
</table></td></tr>
<tr><td>goal</td><td>The goal panel displays displays the progress of a fixed goal in a pie chart. [+]
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Title</td><td>The panel name.</td></tr>
<tr><td>Span</td><td>The number of columns (1 to 12) that the panel will occupy.</td></tr>
<tr><td>Editable</td><td>Show/hides the panel configuration button.</td></tr>
<tr><td>Inspect</td><td>Shows/hides the panel Inspect button. For example, when the Inspect button is turned on, the Elasticsearch query associated with the specific panel appears.</td></tr>
<tr><td>Goal</td><td>The amount of events that should be reached.</td></tr>
<tr><td>donut</td><td>Draws a hole in the middle of the pie chart.</td></tr>
<tr><td>tilt</td><td>Tilts the pie chart back into an oval shape.</td></tr>
<tr><td>legend</td><td>The location of the legend in the panel (top, bottom, none).</td></tr>
<tr><td>labels</td><td>Disable/Enable labels inside the pie chart.</td></tr>
<tr><td>spyable</td><td>Disable/Enable the Inspect function.</td></tr>
<tr><td>Queries</td><td>Enables you to add filters only related to this panel.</td></tr>
<tr><td>Filters</td><td>Enables you to add filters only related to this panel.</td></tr>
</table></td></tr>
</table>

<table>
<tr><th>Panel Name</th><th>Description</th></tr>
<tr><td></td><td></td></tr>
<tr><td>histogram</td><td>The histogram panel enables you to display time charts. This panel includes numerous modes and transformations that enable you to display event counters, mean, min, max and the total of numeric fields, and derivatives of counter fields. [+]
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Title</td><td>The panel name.</td></tr>
<tr><td>Span</td><td>The number of columns (1 to 12) that the panel will occupy.</td></tr>
<tr><td>Editable</td><td>Show/hides the panel configuration button.</td></tr>
<tr><td>Inspect</td><td>Shows/hides the panel Inspect button. For example, when the Inspect button is turned on, the Elasticsearch query associated with the specific panel appears.</td></tr>
<tr><td>Chart value</td><td>Contains the value that wil lbe used for the y-axis. Note: for all modes other than count, the value_field must be defined. The values can be:

count - shows the total count of entries in ElasticSearch for each chart interval.
min - shows the minimum value of the selected numerical field for each chart interval.
avg - shows the average value of the selected numerical field for each chart interval.
max - shows the maximum value of the selected numerical field for each chart interval.
unique - shows the number of selected numerical fields for each chart interval.
sum - shows the sum of the values of the selected numerical fields for each chart interval.
</td></tr>
<tr><td>value_field</td><td>The y-axis field when the mode is set to mean, max, min or total. Note: This field must be numeric.</td></tr>
<tr><td>Derivative</td><td>Displays the change of each point on the x-axis.</td></tr>
<tr><td>Zero fill</td><td>Enters zeros in the gaps.</td></tr>
<tr><td>time_field</td><td>The x-axis field. This field must be defined as a date type in Elasticsearch.</td></tr>
<tr><td>Time correction</td><td>Sets the Local time as the browsers timezone. Valid value: Local Time and UTC.</td></tr>
<tr><td>Auto-interval</td><td>Automatically scales intervals.</td></tr>
<tr><td>Interval</td><td>The interval value used when Auto-interval is set to False.</td></tr>
<tr><td>Resolution</td><td>Indicates the maximum number of chart bars.</td></tr>
</table></td></tr>
</table>

<table>
<tr><th>Panel Name</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Bars</td><td>Shows/hides chart bars.</td></tr>
<tr><td>Lines</td><td>Shows/hides chart lines.</td></tr>
<tr><td>Selectable</td><td>Enables you to click and drag the table to zoom in and out.</td></tr>
<tr><td>x-axis</td><td>Show/hide the x-axis.</td></tr>
<tr><td>y-axis</td><td>Show/hide the y-axis.</td></tr>
<tr><td>Zoom</td><td>Shows/hides the Zoom Out option.</td></tr>
<tr><td>View</td><td>Shows/hides the quick view options section.</td></tr>
<tr><td>Legend</td><td>Shows/hides the table legend.</td></tr>
<tr><td>Counts</td><td>Shows/hides totals in the legend.</td></tr>
<tr><td>Grid</td><td>Enables you to automatically set the minimum and maximum y-axis values.</td></tr>
<tr><td>Queries</td><td>Enables you to add filters only related to this panel.</td></tr>
<tr><td>Filters</td><td>Enables you to add filters only related to this panel.</td></tr>
</table>
</td></tr>
<tr><td>number</td><td>
Displays the results of an Elasticsearch query as a number and percent of the total record count. This panel can be filtered according to a specific field value. For example, Success jobs count. [+]
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Title</td><td>The panel name.</td></tr>
<tr><td>Span</td><td>The number of columns (1 to 12) that the panel will occupy.</td></tr>
<tr><td>Editable</td><td>Show/hides the panel configuration button.</td></tr>
<tr><td>Inspect</td><td>Shows/hides the panel Inspect button. For example, when the Inspect button is turned on, the Elasticsearch query associated with the specific panel appears.</td></tr>
<tr><td>mode</td><td>Contains the value that will be used for the y-axis.
Note: For all modes other than count, the value_field must be defined.

Total - Shows the total event (documents) count.
Value - Shows the count, percentage and trend of records that have a specific value for a specific field.
Range - Shows the count, percentage and trend of records that have a specific value for a specific field in the given range. This mode should be used for numeric fields, such as duration.
</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Panel Name</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Result threshold (for color change)</td><td>The point at which the chart bar color changes.</td></tr>
<tr><td>Threshold in percents</td><td>The value of the Result Threshold as a percentage of the total count.</td></tr>
<tr><td>Default Color</td><td>The default color of the bar before the threshold is reached.</td></tr>
<tr><td>Color when the result is greater than the threshold</td><td>The default color of the bar when the result is greater than the threshold.</td></tr>
<tr><td>Subtitle</td><td>The heading within the panel.</td></tr>
<tr><td>Field</td><td>Enables you to calculate the Value and Range modes.</td></tr>
<tr><td>Value</td><td>The field used for filtering.</td></tr>
<tr><td>Queries</td><td>Enables you to add filters only related to this panel.</td></tr>
<tr><td>Filters</td><td>Enables you to add filters only related to this panel.</td></tr>
</table>
</td></tr>
<tr><td>sankey</td><td>The sankey panel displays a flow diagram, in which the width of the arrows is shown proportionally to the flow quantity. [+]
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Title</td><td>The panel name.</td></tr>
<tr><td>Span</td><td>The number of columns (1 to 12) that the panel will occupy.</td></tr>
<tr><td>Editable</td><td>Show/hides the panel configuration button.</td></tr>
<tr><td>Field 1 ....Field X</td><td>The fields that will be used for events flow tracking.</td></tr>
<tr><td>Height</td><td>The height of the diagram in pixels.</td></tr>
<tr><td>Queries</td><td>Enables you to add filters only related to this panel.</td></tr>
<tr><td>Filters</td><td>Enables you to add filters only related to this panel.</td></tr>
</table>
</td></tr>
<tr><td>table</td><td>The table panel displays a view that can be sorted and divided into pages. The information in this panel can be arranged into defined columns and offers several interactions (for example, adhoc term aggregations). [+]
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Title</td><td>The panel name.</td></tr>
<tr><td>Span</td><td>The number of columns (1 to 12) that the panel will occupy.</td></tr>
</table>
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</table>

<table>
<tr><th>Panel Name</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Editable</td><td>Show/hides the panel configuration button.</td></tr>
<tr><td>Inspect</td><td>Shows/hides the panel Inspect button. For example, when the Inspect button is turned on, the Elasticsearch query associated with the specific panel appears.</td></tr>
<tr><td>Header</td><td>Shows/hides column headings.</td></tr>
<tr><td>Sorting</td><td>Enables/disables column sorting.</td></tr>
<tr><td>Sort</td><td>Contains the data according to which the table should be sorted. For example, '@timestamp','desc'</td></tr>
<tr><td>Font Size</td><td>The size of the table font in pixels.</td></tr>
<tr><td>Local Time</td><td>Select this parameter to adjust the timeField to the browser's local time.</td></tr>
<tr><td>Columns</td><td>The list of columns that can appear in the table.</td></tr>
<tr><td>Highlight values</td><td>A list of values that can be highlighted.</td></tr>
<tr><td>Show Controls</td><td>Shows/hides pagination control buttons.</td></tr>
<tr><td>Overflow</td><td>Contains the css overflow property. That is, ‘min-height’ (expand) or ‘auto’ (scroll).</td></tr>
<tr><td>Per Page</td><td>The maximum number of rows on one page.</td></tr>
<tr><td>Page limit</td><td>The maximum number of pages.</td></tr>
<tr><td>Queries</td><td>Enables you to add filters only related to this panel.</td></tr>
<tr><td>Filters</td><td>Enables you to add filters only related to this panel.</td></tr>
</table>
</td></tr>
<tr><td>terms</td><td>
The terms panel displays a table, bar chart or pie chart based on the results of an Elasticsearch terms facet. [+]
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Title</td><td>The panel name.</td></tr>
<tr><td>Span</td><td>The number of columns (1 to 12) that the panel will occupy.</td></tr>
<tr><td>Editable</td><td>Show/hides the panel configuration button.</td></tr>
<tr><td>Inspect</td><td>Shows/hides the panel Inspect button. For example, when the Inspect button is turned on, the Elasticsearch query associated with the specific panel appears.</td></tr>
<tr><td>Terms mode</td><td>terms - unique values used for grouping documents.
terms_stats - count, min, max, avg or sum statistics that can be applied to the Value field according to the unique value of the field.</td></tr>
<tr><td>Field</td><td>Indicates the field on which to compute the facet.</td></tr>
</table>
</td></tr>
</table>

<table>
<tr><th>Panel Name</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Length</td><td>The maximum number of values in a chart.</td></tr>
<tr><td>Order</td><td>The sorting rule.</td></tr>
<tr><td>Style</td><td>Chart type (bar, pie or table).</td></tr>
<tr><td>Legend</td><td>Shows/hides the legend.</td></tr>
<tr><td>Legend Format</td><td>Indicates the legend alignment options.</td></tr>
<tr><td>Missing</td><td>Select/deselect this option to show/hide the display of a counter that shows how many results are missing.</td></tr>
<tr><td>Other</td><td>Select/deselect this option to show/hide the display of a counter that represents the aggregate of all values that exceed the set length.</td></tr>
<tr><td>Percents</td><td>Enables you to add percentages to each facet.</td></tr>
<tr><td>Exclude Terms(s) (comma separated)</td><td>Indicates the terms that should be excluded from the results.</td></tr>
<tr><td>Use Splitting</td><td>Enables facet splitting by other field values.</td></tr>
<tr><td>Splitted Bars Colors</td><td>Custom bar colors for specific values.</td></tr>
<tr><td>Queries</td><td>Enables you to add filters only related to this panel.</td></tr>
<tr><td>Filters</td><td>Enables you to add filters only related to this panel.</td></tr>
</table>
</td></tr>
<tr><td>Text</td><td>
The Text panel displays static formatted as markdown, sanitized html or as plain . [+]
<table>
<tr><th>Panel Parameter</th><th>Description</th></tr>
<tr><td>Title</td><td>The panel name.</td></tr>
<tr><td>Span</td><td>The number of columns (1 to 12) that the panel will occupy.</td></tr>
<tr><td>Editable</td><td>Show/hides the panel configuration button.</td></tr>
<tr><td>Mode</td><td>Displays html, markdown or .</td></tr>
<tr><td>Content (This area uses Markdown. HTML is not supported)</td><td>Displays the content of your panel in the selected mode.</td></tr>
</table>
</td></tr>
</table>

Related Topics

- Configure a Dashboard

- Configure a Dashboard Row

Job Record Dashboard

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.

The Job Record Dashboard  contains data about a Job's status and its results.

Job records can contain data associated with one or more of the following fields:

Field	Type	Description
id	keyword	Index ID
parentid	keyword	Parent Job ID
ccid	keyword	Contact Center ID
name	keyword	Job Name
type	keyword	Type
state	keyword	State: ['STOP', 'RUNNING', 'COMPLETED']
result	keyword	Job result: ['NONE', 'SUCCESS', 'FAIL']
created	date	The timestamp of when the job was created.
started	date	The timestamp of when the job was started.
finished	date	The timestamp of when the job was finished.
duration	integer	The Duration in milliseconds (ms).
error	text	An Error message.
errorCode	integer	Error Code
options	keyword	The Job options used for the creation of a job.
trace	keyword	Trace Steps
attributes	keyword	The attributes that are generated by the job execution.
@timestamp	date	The ISO format of the Index

Field	Type	Description
		timestamp
@endtime	date	The timestamp of when the job was finished.
component	keyword	Job execution component.
version	keyword	Job execution component version.
hostname	keyword	The hostname of the component instance that executed a job.
address	keyword	The IP address of the component instance that executed a job.

Related Topics

- Configure a Dashboard
- Configure a Dashboard Row
- Create an Analytics Dashboard Panel

Device Import Detail Report Dashboard

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.

The Device Import Detail Report Dashboard  contains data about Device Import Detail Report results.

Device Import Detail Reports can contain data associated with one or more of the following fields.

Important

Other 1-N fields of type string are supported for the Device Import Detail Record Dashboard.

Field	Type	Description
@timestamp	date	The ISO format of the index timestamp.
jobid	keyword	The Import jod ID.
jobts	date	The timestamp of the start of the Import job.
importfile	keyword	The original input Import file name.
line	integer	The line number in the Import file.
useSpecificationFile	keyword	The Specification file.
mappingfile	keyword	The name of the Specification file.
ccid	keyword	Contact center ID.
listid	integer	Calling list database ID.
listTableName	keyword	Calling list database table name.
chain_id	integer	Indicates the Contact ID in the database table.

Field	Type	Description
customTZMap	boolean	The selected Custom Time Zones.
listName	keyword	Calling list name.
id	keyword	The Index ID.
type	keyword	The type of list.
chain_n	integer	The number of the device in the contact/chain.
contact_info	keyword	The phone number that should be dialed.
defaultRegion	keyword	The Settings default region configuration.
accepted	byte	Indicates if the recorded has been accepted. 0-false, 1-true.
dbAccepted	integer	Indicates whether or not an error occurred when the saving to the database. 0 - was error, 1 - no. Default value is 1.
error	keyword	Indicates the processing device error.
deviceIndex	short	Device index.
maskValue	long	Device mask value.
mask	object	Device mask per bits.
deviceDigits	text	The original Input file device string.
e164	keyword	The e164 format of the device number.
countryCode	keyword	Country code.
areaCode	keyword	Area code.
exchange	keyword	The device number Exchange part.
restOfNumber	keyword	The Rest part of the device number.
extension	integer	Extension
tzuid	integer	Device Time Zone Java UID.
state_code	keyword	The State code detected in the device number.
country_code_iso	keyword	Device ISO Country code.

Related Topics

- Configure a Dashboard

- Configure a Dashboard Row
- Create an Analytics Dashboard Panel

Preloading Record Dashboard

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.

The Preloading Record Dashboard  contains data about numbers that were removed from one or more Call Lists.

Preloading records can contain data associated with one or more of the following fields:

Field	Type	Description
blockingRuleName	keyword	The name of the CME object that stores the blocking rule. For example, the name of the suppression list (TA), Compliance Rule (Script).
blockingRuleType	keyword	The type of blocking rule. For example, Suppression List, Device Filter, Compliance Rule.
blockingRuleSubType	keyword	The sub-type of blocking rule. For example, Mandatory Suppression List, Optional Suppression List, Custom Rule, Attempt Rule, Location Rule, Contact Times, Contact Dates.
ccid	keyword	The Contact Center ID.
campaignName	keyword	The Campaign name.
campaignID	keyword	The Campaign database ID.
campaignGroupName	keyword	The Campaign Group name.
campaignGroupID	keyword	The Campaign Group database ID.
campaignTemplateName	keyword	The Campaign template.
campaignTemplateID	keyword	The Campaign template database ID.
groupName	keyword	The Agent Group name.
groupID	keyword	The Agent Group database ID.
listName	keyword	The Calling list name.

Field	Type	Description
listid	integer	The Calling List database ID.
@timestamp	date	The timestamp of when the Elasticsearch index was submitted.
id	Keyword	Elasticsearch index ID.
recordID	integer	The Record ID in the Calling List database table.
clientID	integer	The Client ID in the Specification file that is shown in the Input file.
chain_id	integer	The Contact ID in the database table.
chain_n	integer	The device number in the contact/chain.
contact_info	keyword	The contact's phone number.
contact_info_type	keyword	The ContactType common library enum (GctiContactType) that is based on the cd_device_index.
recordType	keyword	The type of chain (enum is GctiRecordType).
recordStatus	keyword	The location of the record in the State machine (enum is GctiRecordType). The default is Ready.
deviceCountryCode	integer	The country code for the phone number.
deviceAreaCode	integer	The area code for the phone number.
deviceStateCode	integer	The state code for the phone number.
deviceTimezone	integer	The timezone for the detected device.
deviceMask	integer	An integer number that contains the bit mask.
postalCode	integer	The postal code read from the Input file.
disposition	keyword	The reason for suppressing the device. For example, device mask, name of suppression list, name of location rule, and so on.
reason	keyword	A description of why the device was suppressed.
customFields	keyword	N/A
tiimestamp_iso8601	integer	The ISO index timestamp format.

Related Topics

- Configure a Dashboard
- Configure a Dashboard Row
- Create an Analytics Dashboard Panel

Campaign Group Event Record Dashboard

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.

The Campaign Group Event Record Dashboard  contains data about the status of a Campaign group.

Campaign Group Event records can contain data associated with one or more of the following fields:

Field	Type	Description
id	keyword	Elasticsearch Index ID
@timestamp	date	The timestamp of when the Elasticsearch index was submitted.
ccid	keyword	Contact Center ID
sessionuuid	keyword	The Session GUID of the currently active/running campaign group.
action	keyword	The action that was applied to the Campaign Group. For example, ['None', 'LoadCampaign', 'StartDialing', 'StopDialing', 'UnloadCampaign'].
state	keyword	The current Campaign Group state. For example, ['NotLoaded', 'Active', 'Running', 'UnloadInProgress', 'WaitingUnload', 'NotLoaded'].
dialingMode	keyword	The Dialing mode.
campaignName	keyword	The Campaign name.
campaignGroupName	keyword	The Campaign group name.
campaignGroupDBID	integer	The Campaign group DBID.
campaignTemplateName	keyword	The Campaign template name.
groupName	keyword	The Group name.
actualBusyFactor	float	The current agent's busy factor (reported by OCS).

Field	Type	Description
actualHitRatio	float	The current Hit Ratio (reported by OCS).
actualOverdialRate	float	The percentage of abandoned calls (reported by OCS).
actualTimeToComplete	float	The time it took to complete the Group Campaign lists (reported by OCS).
lists	object	The Campaign Group calling lists.

Related Topics

- Configure a Dashboard
- Configure a Dashboard Row
- Create an Analytics Dashboard Panel

Call Result Record Dashboard

> **Important**
> The content of this document has been moved and is no longer being updated in this location.
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The Call Result Record Dashboard  contains data about call attempts..

Call Result Record records can contain data associated with one or more of the following fields:

Field	Type	Description
id	keyword	Index ID
@timestamp	date	The timestamp at which OCS starts to process the call attempt. It is the time at which the pre-dial validation request is sent by OCS to CX Contact.
@endtime	date	The timestamp at which the outbound record for the given call is considered complete and is removed from OCS active processing (for example, on dial error, or when a finalization event is received from the agent desktop).
ccid	keyword	The Contact Center ID.
calluuid	keyword	The call attempt GUID.
contact_info	keyword	The device's phone number.
contact_info_type	keyword	The Common library enum (GctiContactType) based on the cd_device_index. For example, ['No Contact Type', 'Home Phone', 'Direct Business Phone', ...].
blockingRuleName	keyword	The name of the CME object that stores the blocking rule. For example, the name of the suppression list (TA), Compliance Rule (Script).

Field	Type	Description
blockingRuleType	keyword	The type of blocking rule. For example, Suppression List, Device Filter, Compliance Rule.
blockingRuleSubType	keyword	The sub-type of blocking rule. For example, Mandatory Suppression List, Optional Suppression List, Custom Rule, Attempt Rule, Location Rule, Contact Times, Contact Dates.
callerID	keyword	The Caller ID used to place the call.
callerIDSetName	keyword	The name of the Caller ID Set (if used), that stores Caller ID.
chain_id	integer	Indicates the Contact ID in the database table.
chain_n	integer	The number of the device in the contact/chain.
clientId	keyword	The Client ID in the Input file that was provided from the specification file.
duration	integer	The processing duration (that is, endtime - timestamp).
durationCall	integer	The call duration (ms). That is, (timeAbandoned - timeClientPickedUp), (timeAgentCallReleased - timeClientPickedUp), or (timeBadCallReleased - timeDialing).
durationACW	integer	The duration of the After Call Work phase associated with call processing (ms).
durationCPD	integer	The duration of the Call Progress Detection phase associated with call processing (ms).
durationQueue	integer	The duration of Call Waiting in the queue (ms).
timeDialing	date	The dialing start time.
timeClientRinging	date	The time at which the client number rang.
timeBadCallReleased	date	The approximate time at which the unsuccessful call was released.
timeClientPickedUp	date	The time at which the called party answers the phone.
timeCPDFinished	date	The time at which the call progress detection is completed.

Field	Type	Description
timeQueued	date	The time at which the call is placed in the queue.
timeAgentRinging	date	The time at which the ringing starts on the agent's DN.
timeAgentEstablished	date	The time at which the cal lis established on the agent's DN.
timeAMDiverted	date	The time at which a call is diverted to an auto-answering device (for example, calls that are not connected to an agent within two seconds might be redirected to a pre-recorded message).
timeAbandoned	date	The time at which a call is abandoned from the queue.
timeAgentCallReleased	date	The time at which a call is released on the agent's DN.
callTime	integer	The timestamp of when the call started.
callResult	integer	The call result.
dialingMode	keyword	The dialing mode associated with the Campaign Group used to place the call.
optimizationGoal	integer	The Optimization goal when the dialing mode is Predictive (for example, Busy Factor 80%).
optimizationMethod	keyword	The OCS optimization method when the dialing mode is Predictive (for example, Busy Factor).
listName	keyword	The Calling list name.
campaignName	keyword	The Campaign name.
campaignGroupName	keyword	The Campaign group name.
sessionuuid	keyword	The Session GUID of the currently active/running campaign group.
campaignTemplateName	keyword	The Campaign template name.
groupName	Keyword	The Agent of Place group name.
timezoneName	keyword	The name of the JAVA timezone.
timezoneNameCME	keyword	The name of the CME timezone.
timezoneOffset	keyword	The timezone offset.
agentLoginId	keyword	The Login ID belonging to the agent who handled the call.
scheduledTime	date	The time at which the call was rescheduled.
recordType	keyword	The type of record (enum is

Field	Type	Description
		GctiRecordType).
recordStatus	keyword	The location of the record in the State machine (enum is GctiRecordType). The default is Ready.
voiceTransferDestination	keyword	The name of the Voice Transfer Destination DN used by the Campaign Group.
countryCode	keyword	The phone number's country code.
clientCountryCode	keyword	The client's country code.
areaCode	keyword	The phone number's area code.
deviceTimezone	keyword	The timezone for the detected device.
disposition	keyword	Indicates if the call was blocked by a pre-dial validation or dialed. If the call was blocked, the value is Blocked, otherwise it’s Unknown or Called.
postalCode	keyword	The postal code.
deliveryMode	keyword	The Delivery mode of the Campaign Group (“lifo” for LIFO-configured Campaign Groups, “standard” otherwise).
dispositionCode	keyword	The Disposition code as provided for the call by the agent (via GSW_DISPOSITION_CODE attribute).
userData	object	User data fields associated with the call.

Related Topics

- Configure a Dashboard
- Configure a Dashboard Row
- Create an Analytics Dashboard Panel

Contact History Record Dashboard

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.

The Contact History Record Dashboard  contains statistical and contact data about the last call attempt to a specific contact associated with a calling list in a specific campaign group session.

Contact History records can contain data associated with one or more of the following fields:

Field	Type	Description
@timestamp	date	The timestamp at which OCS starts to process the call attempt. It is the time at which the pre-dial validation request is sent by OCS to CX Contact.
@endtime	date	The timestamp at which the outbound record for the given call is considered complete and is removed from OCS active processing (for example, on dial error, or when a finalization event is received from the agent desktop).
ccid	keyword	The Contact Center ID.
calluuid	keyword	The call attempt GUID.
chain_id	integer	Indicates the Contact ID in the database table.
chain_n	integer	The number of the device in the contact/chain.
contact_info	keyword	The device's phone number.
contact_info_type	keyword	The Common library enum (GctiContactType) based on the cd_device_index. For example, ['No Contact Type', 'Home Phone', 'Direct Business Phone', ...].
duration	integer	The processing duration (that is,

Field	Type	Description
		endtime - timestamp).
durationCall	integer	The call duration (ms). That is, (timeAbandoned - timeClientPickedUp), (timeAgentCallReleased - timeClientPickedUp), or (timeBadCallReleased - timeDialing).
timeDialing	integer	The dialing timestamp.
timeClientRinging	integer	The timestamp of when the client number rang.
callTime	integer	The timestamp of when the call started.
callResult	integer	The call result.
optimizationGoal	integer	Indicates the highest allowable percentage of proactively triggered interactions that can be closed by visitors prior to an agent joining the session.
optimizationMethod	keyword	The OCS optimization method.
listName	keyword	The Calling list name.
campaignName	keyword	The Campaign name.
campaignTemplateName	keyword	The campaign template name.
campaignGroupName	keyword	The campaign group name.
groupName	keyword	The agent's group name.
timezoneNameCME	keyword	The name of the CME timezone.
timezoneName	keyword	The name of the JAVA timezone.
timezoneOffset	keyword	The timezone offset.
recordType	keyword	The type of chain (enum is GctiRecordType).
recordStatus	keyword	The status of the record in the State machine (enum is GctiRecordType). The default value is Ready.
VoiceTransferDestination	integer	The GSW Queue name.
countryCode	keyword	The phone number's country code.
ClientCountryCode	keyword	The client's country code.
areaCode	keyword	The phone number's area code.
postalCode	keyword	The postal code.
disposition	keyword	Indicates whether or not GSW_BLOCKING_RULE is available. If it is available the value is Blocked. If it is not

Field	Type	Description
		available GSW_HIST_SEQUENCE_NUM == 0 and the value is Unknown or Called.
sessionuuid	integer	The Session GUID of the currently active or running campaign group.
userData	keyword	Includes all of the information received from OCS in a History HTTP POST. The information does not start with GSW_.
id	keyword	Identifies the last call made to any device belonging to a contact listed in the Session GUID and calling list.
contact_id	integer	A composite property used to identify a contact in the calling list. For example, listid.chainId.
listId	integer	The Calling list ID in the database.
successful	keyword	The call attempt result [false, true].

Related Topics

- Configure a Dashboard
- Configure a Dashboard Row
- Create an Analytics Dashboard Panel

SMS/EMAIL Record Dashboard

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.

The SMS/EMAIL Record Dashboard  contains data about SMS/EMAIL events.

SMS/EMAIL records can contain data associated with one or more of the following fields:

Field	Type	Description
id	keyword	The Index ID.
@timestamp	date	The ISO index timestamp.
timestamp	integer	The timestamp of the last time the index was updated.
ccid	keyword	The Contact Center ID.
mediaType	keyword	The Media type (sms, email).
batchID	keyword	The Batch ID in the message that was received from OCS.
messageID	keyword	The unique Message ID. For example, ccid.calluuid.
calluuid	keyword	The call attempt GUID.
sessionuuid	keyword	The session GUID for the currently active/running Campaign group.
campaignName	keyword	The Campaign name.
groupName	keyword	The Group name.
campaignGroupName	keyword	The Campaign group name.
listName	keyword	The calling list name.
chainId	integer	Indicates the Contact ID in the database table.
chainN	integer	The number of the device in the contact/chain.
contact_info	keyword	The device's phone number or email address.
from	keyword	The sender's phone number or

Field	Type	Description
		email address.
subject	keyword	The subject of the message.
clientId	keyword	The Client ID in the Input file that was provided from the specification file.
timeReceivedFromOCS	date	The timestamp of when the message was received from OCS.
timeSubmittedToNexus	date	The timestamp of when the message was submitted to Nexus.
timeResponseReceived	date	The timestamp of when the message was received from Nexus.
timeOCSNotified	date	The timestamp of when OCS provided a result.
timeConsumerResponded	date	The timestamp of when the user response (STOP) was received from Nexus.
deliveryReceipt	keyword	The Nexus delivery result code.
callResult	keyword	The call result. • OK - (Successful Delivery) • Dial Error – (Carrier type errors) • System Error – (Service/ Product type errors) • General Error – (User Settings or User Content type errors) • No Progress – any other error (catch all for anything else)
disposition	keyword	The Disposition code. For example, <Nexus Delivery Result>:<Nexus extended state>
status	keyword	The message status. For example, ['receivedFromOCS', 'queuedInternally', 'submittedToNexus', 'respondedFromNexus', 'notifiedOCS'].
optout	boolean	Indicate if the user sent STOP (for SMS) or unsubscribed (for Email).
errorCode	integer	The error code.
errorMessage	keyword	The error message.
content	text	The content of an SMS message after personalization was applied.

Field	Type	Description
providerReceipt	keyword	The final SMS delivery state received from the SMS Aggregator.
userData	object	The user related data that was received from OCS and used for filling in templates.

Related Topics

- Configure a Dashboard
- Configure a Dashboard Row
- Create an Analytics Dashboard Panel

User Actions Dashboard

Important

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The User Actions dashboard  contains data about user events (that is, who did what and exactly when).

In addition to the numerous panels that can be created for the User Actions Dashboard, this dashboard contains an **Audit Trail Log** A user's activity is logged for 31 days in the **Audit Trail Log** panel. After 31 days the activity in the Audit Trail Log is deleted.

User Actions records can contain data associated with one or more of the following fields (Audit Trail log):

Field	Type	Description
id	keyword	Unique identifier
requestID	keyword	Used to track specific API requests (for example, customer scripting troubleshooting purposes). This field contains the Request ID. The Request ID can be provided via the x-request-id header in the API CX Contact request. The Request ID must be generated by the client and can be used to track specific API requests (for example, for customer scripting troubleshooting purposes).
@timestamp	date	The date/time when an action started (for example, when the request arrived in the system).
userName	keyword	The login user name that initiated the logged action.
@endtime	date	The date/time when the action was completed.
duration	integer	The duration of the action (@endtime - @timestamp) in

Field	Type	Description
		milliseconds.
action	keyword	EDIT | DELETE | ALTER | LOGIN | LOGOUT | EXECUTE | SEARCH | READ | TEST • CREATE – Object or entity has been created. • EDIT - Object or entity has been modified. • DELETE – Object or entity has been deleted. • ALTER - Indicate that the underlying physical object (for example, calling list table) has been modified. • EXECUTE - Any action over Campaign Group in OCS (for example, Load or Start). • SEARCH - Search for a contact or suppression entry. • READ - Used for Contact or Suppression Lists exports. • TEST – Used for List Automation Jobs test executions. • LOGIN – Used for user logins into the system. • LOGOUT - Used for user logouts out of the system.
actionDetails	keyword	Provides additional details about the action. These values are dependent on the CX Contact object or entity. • Import • Export • Add Entry • Add Batch • Purge • Delete Entry • Delete Batch • Logout Manual

Field	Type	Description
		• Logout Automatic • Start • Stop • Pause • Pre-load • Duplicate • Edit Entry • Abort
objectType	keyword	The type of object. For example, Campaign Group, Contact List, Suppression List, Time Zones Map, Compliance Rule, List Rule, List Automation, and so on. For details, refer to the Object Types and Related Sub-types section.
objectSubtype	keyword	A sub-classification of the object type. For example, Attempt Rule, Location Rule, Filtering rule, Selection Rule Contact, Upload Rule Contact, and so on. For details, refer to the Object Types and Related Sub-types section
objectName	keyword	The name of the object as stored in CME.
objectID	integer	DBID of the object as stored in CME.
apicall	boolean	Appears as **True** if the executed action is performed via an API call and **False** if the executed action is performed via the user interface. This field enables you to see if a change was manually performed by a user or automatically by the system. For example, if the change was manually performed by a user the apiCall is false and if the change was automatically made from a 3rd party system or external system using an API call to run the command remotely the apiCall is true.
successful	boolean	Appears as **True** if the action was completed successfully and **False** if the action was not completed successfully.

Field	Type	Description
errorMessage	text	An error message (as displayed in the user interface or returned as an API response) when the request execution was not successful.
details	text	An additional textual description of the action when available.
endPoint	text	The API end point that was called.
changeSet	object	Contains details about what was changed (for example, a new option value, a new dialing mode, and so on) in JSON format. **Note:** The Change Set is only stored when the changes are successful and only for objects represented in CME (for example, EDIT action).

Object Types and Related Sub-types

Object Type	Object Sub-types
Campaign Group	• Voice • SMS • Email
Campaign Template	• Voice • SMS • Email
Dialing Profile	• Voice • SMS • Email
Session Profile	• Voice • SMS • Email

Object Type	Object Sub-types
Contact List	• Contact List • Original File • Rejects File • Message File
Suppression List	• Suppression List Voice • Suppression List SMS • Suppression List Email • Original File • Rejects File • Message File
Time Zones Map	
Compliance Rule	• Attempt Rule • Location Rule • Custom Rules • Contact Times • Contact Dates
List Rule	• Filtering Rule • Upload Rule Contact • Upload Rule Suppression • Selection Rule Contact • Selection Rule Suppression • Selection Rule Advanced
List Automation	• Import File • Send Campaign Group • Import Suppression • Export Contact List
Label	
Specification File	

Object Type	Object Sub-types
Data Mapping	• For Import
Settings	• General • Security • Pacing
Analytics	• Dashboard • Panel

Related Topics

- Configure a Dashboard
- Configure a Dashboard Row
- Create an Analytics Dashboard Panel

Outbound Schedules Dashboard

Important

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For the latest content and most recent updates, see the CX Contact Help on the Genesys Multicloud site.

The Outbound Schedules Dashboard contains data about a Schedule's status and its results.

Schedule records can contain data associated with one or more of the following fields. For details refer to Schedules:

Field	Type	Description
@timestamp	date	The timestamp of when the Elasticsearch index was submitted.
Schedule name	keyword	The Schedule name.
recurrenceType	keyword	Indicates how often the schedule reoccurs (for example, Daily, Weekly, Monthly, or Once).
scheduleAction	keyword	The Action that should be executed for the specific schedule (for example, Triggered, Activated, Deactivated, or CommandExecuted).
command	keyword	The Command that should be executed for the specific Campaign Group when the selected Action is CommandExecuted (for example, Load, Start, Stop, Unload, or Set dial mode).
commandType	keyword	The type of execution line the command belongs to (that is, Sequential/Instant).
commandID	integer	Internal identifier of the command.
successful	boolean	Indicates true or false. True if the action is completed successfully and false if the action is not completed successfully.

Field	Type	Description
errorMessage	keyword	Contains a relevant error message (as displayed in the UI or as returned in the API response) when the request execution is not successful.
campaignName	keyword	The Campaign name.
campaignGroupName	keyword	The Campaign Group name.
campaignGroupDBID	integer	The Campaign group DBID.
campaignTemplateName	keyword	The Campaign template name.
groupName	keyword	The Group name.
dialingMode	keyword	The Dialing mode.
optimizationParameter	integer	The Optimization goal when the dialing mode is Predictive (for example, Busy Factor 80%).
optimizationType	keyword	The OCS optimization method when the dialing mode is Predictive (for example, Busy Factor).

Settings

> ### Important
> The content of this document has been moved and is no longer being updated in this location.
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Use this page to view or change any of the following settings:

- General settings
- Security settings
- Pacing settings
- Session profiles

General

- **Account Name** - The name of the account.
- **Caller ID** - This is the number that will appear on customer's Caller ID display. It should be a valid number that belongs to you or your contact center (in many locations, this is a legal requirement). You can override the Caller ID number when you create or edit a dialing profile.
- **DAP name** - The name of the Database Access Point (DAP) object.
- **Format name** - The name of the format applied to the Table Access object.
- **Disposition Codes** - The name of the configuration object (In the configuration database) that stores the disposition codes that CX Contact refers to when applying call treatments. Refer to the Retry Options page for more information.

Region

- **Country Code** - The country code associated with the account.
- **Timezone** - The default timezone associated with the contacts loaded from a list.
- **Locale** - The preferred language for the account.
- **Reports Default Time Zone** - The timezone used for reports.

Lists

- **Default timezone** - The timezone associated with the account.
- **Default region** - The default timezone associated with the contacts loaded from a list.
- **Default timezone on error** - If there is a system-level error when processing timezones, the timezone specified here becomes the default for the record.
- **Max split lists** - The maximum number of list partitions that can be created from a contact list using selection rules.

Security

- **Minimum password length** - The minimum length of a CX Contact password.
- **Automatically sign out** - The duration of inactivity before CX Contact automatically signs the user out.
- **Use strict sign out** - Enables/disables a forced sign out of the CX Contact UI every time the browser page is closed.
- **Encryption** -
    - **Enable/Disable Encryption** - Enables/disables all of the encryption controls.
    - **Secure all Contact Lists** - Enables encryption for all Contact Lists. When enabled, you cannot enable/disable encryption for one specific Contact list.
    - **Secure all Suppression Lists** - Enables encryption for all Suppression Lists. When enabled, you cannot enable/disable encryption for one specific Suppression list.
    - **Secure Outbound Analytics Reports** - Enables encryption for all downloadable reports from Outbound Analytics.
    - **Public Keys** - A list of User Public Keys that include:

        Type - The type of key.

        User ID - the user ID associated with the specific Public Key.

        Upload Date - The date and time at which the Public Key was uploaded into CX Contact.

        Algorithm - Displays the public key algorithm provided by the List Builder.

        Expiration Date - Displays the key expiration date for the public key or **Never** if the key never expires.
    - **Import** - Enables you to import a user's public keys. When this option is selected an **Import Public Key** dialog is opened. In the **Enter Public Key UserID** field, enter the unique User ID (e-mail), select the file that contains the Public Key that CX Contact should use for data encryption and click **Import**.

        CX Contact supports rsa3072 and rsa4096 Public Keys in plain text (ASCII Armor) format.
    - **Download CX Contact Public Key** - Enables you to download a CX Contact Public key that should be used to encrypt data files before uploading them to CX Contact.

Important

When **Enable Encryption** is turned on at least one User Public Key must be uploaded to enable you to save the settings in the **Security** page.

Pacing

- **Target Abandon Rate** - The target call abandonment rate. For example, if you specify 3%, the system adjusts the number of calls dialed to achieve the 3% goal. Call pacing may increase and decrease as the target rate fluctuates.
- **Abandon Call Definition** - The number of seconds used to determine whether a call is considered abandoned.
- **Maximum Attempts per Minute (Voice, SMS, and Email)** - The maximum allowable number of contact attempts per minute for Voice, SMS, and Email channels.

Session Profiles

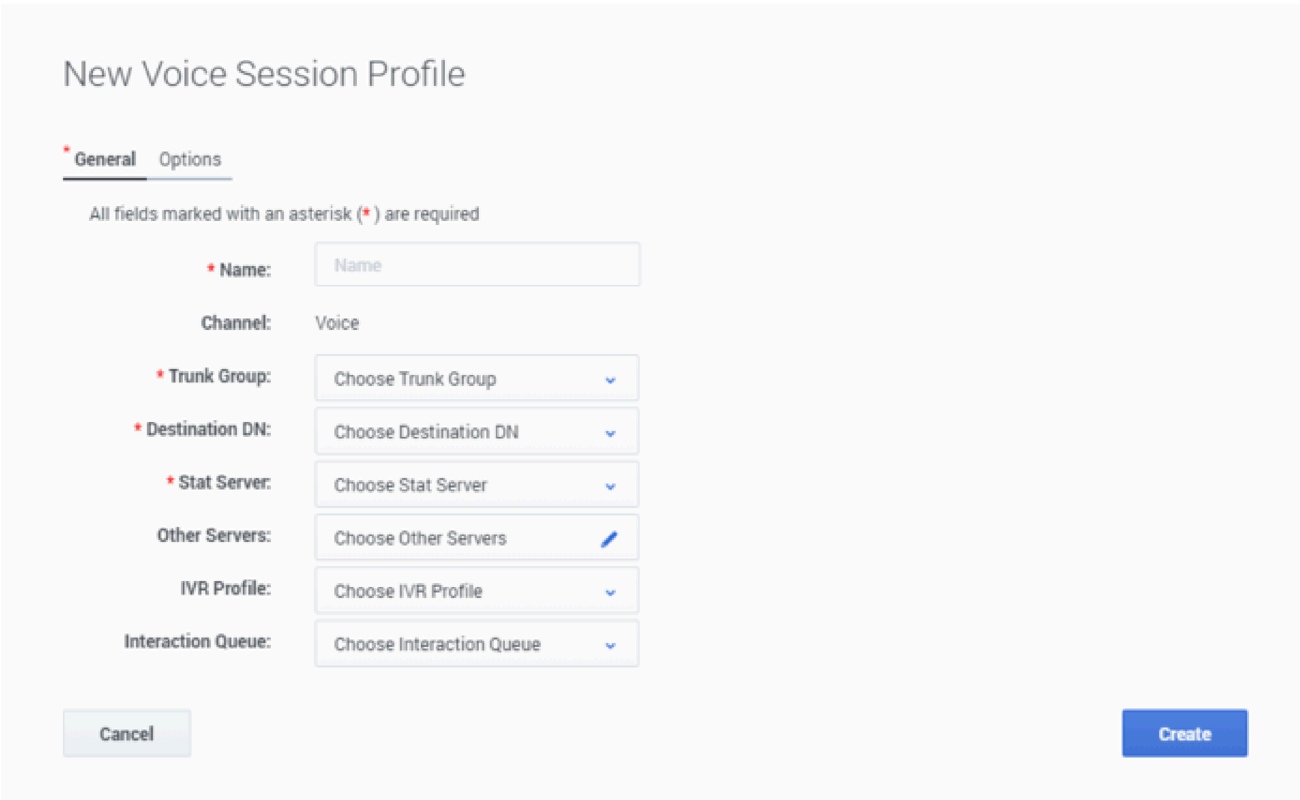
With Session Profiles you can create, view, and edit user profile privileges for a Voice profile, SMS profile and/or an Email profile.

General

- **Name** - The Session Profile name.
- **Channel** - Indicates the Session Profile type (for example, Voice, SMS or Email).
- **Agent Group** - A drop down menu that includes the names of all of the enabled Agent Groups that are included in the Tenant associated with CX Contact.
- **Trunk Group** - A drop down menu that includes the names of all of the enabled Trunk Group DNs that are included in the Tenant associated with CX Contact (for example, Environment).
- **Destination DN** - A drop down menu that includes all the enabled DNs types (for example, Routing Point, External Routing Point, ACD Queue) that are included in the Tenant associated with CX Contact.
- **Stat Server** - A drop down menu that includes all of the enabled Stat Server applications.
- **Other Servers** - A drop down menu that includes all of the enabled applications for Interaction Server and T-Server.
- **IVR Profile** - A drop down menu that includes all of the IVR Profile objects that are included in the Tenant associated with CX Contact.
- **Interaction Query** - A drop down menu that includes all of the Interaction Queue scripts that are

included in the Tenant associated with CX Contact.

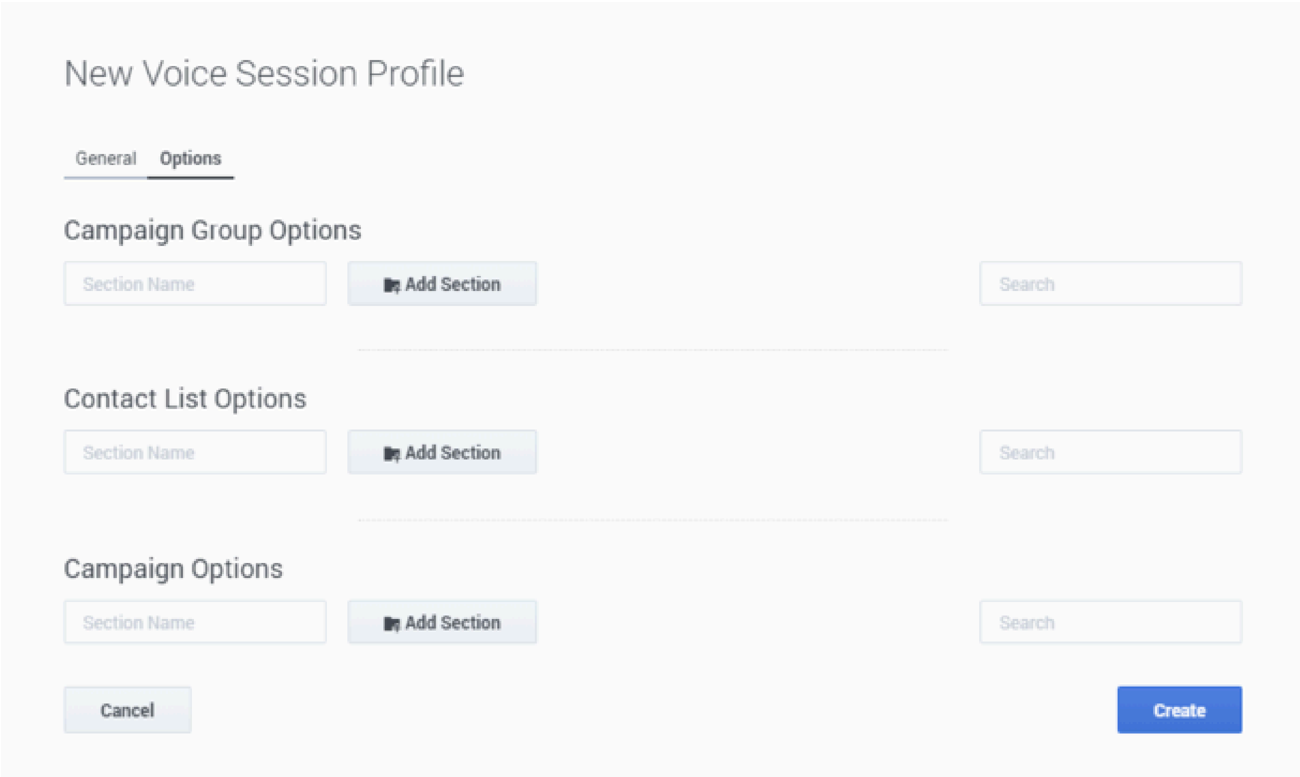
The following image is an example of the New Voice Session Profile window > General tab.



Options

- **Use the options available in the Options tab to add** Outbound Contact Configuration **options. For details refer to the OCS Options by Logical Group.**

The following image is an example of the New Voice Session Profile window > Options tab.



For additional information about Session Profiles, refer to Campaign Structure and Terminology > Session Profiles.