CX Contact Help

Compliance Tools

4/10/2025

Contents

Compliance Tools

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The content of this document has been moved and is no longer being updated in this location.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 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

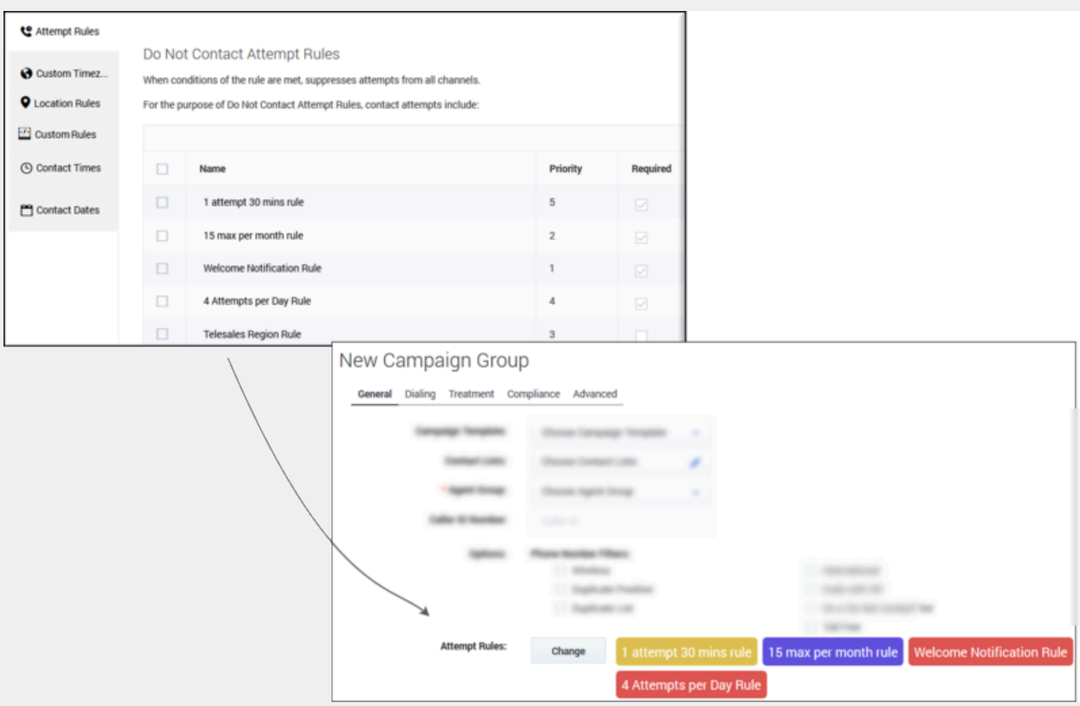
Attempt Rules

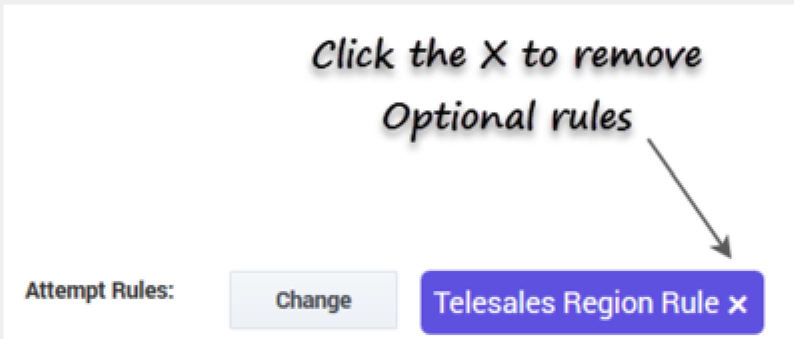
Use the **Attempt Rules** option to specify certain conditions that, when met, suppress a contact attempt. The following conditions can make up an Attempt Rule:

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.

How to enable	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). 

	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'

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- 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

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How to enable

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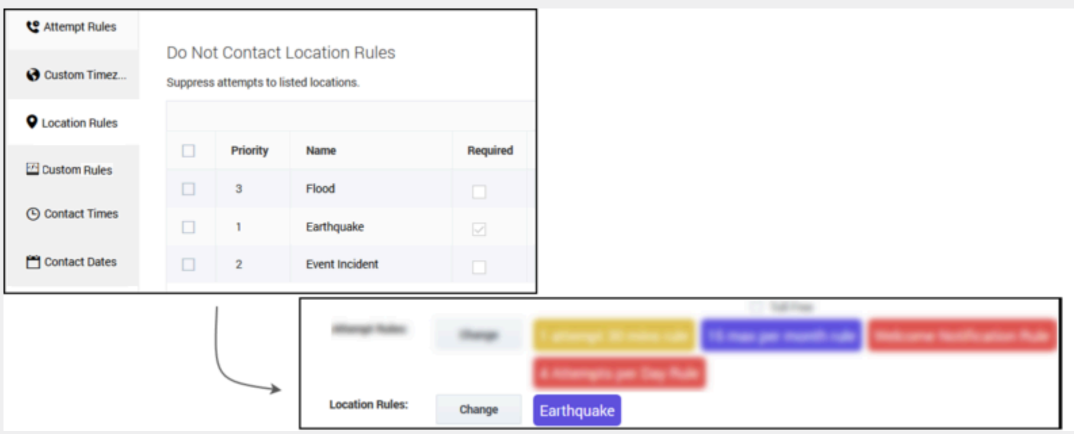
On the **Location Rules** tab, select **New** and specify the location attributes as described above.

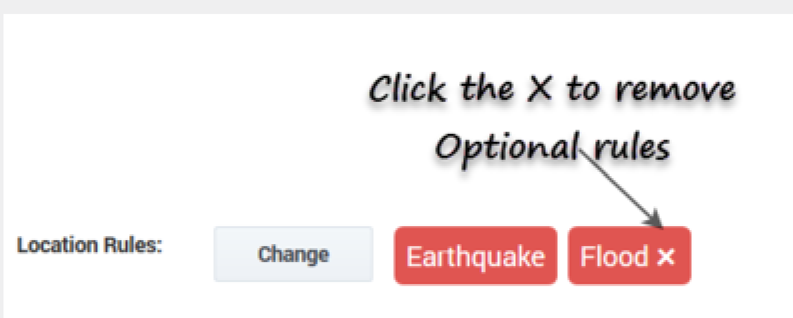
The new rule will appear on the **Location Rules** page and it will populate in the **Location Rules** section when you create or edit a campaign object.



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.



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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.

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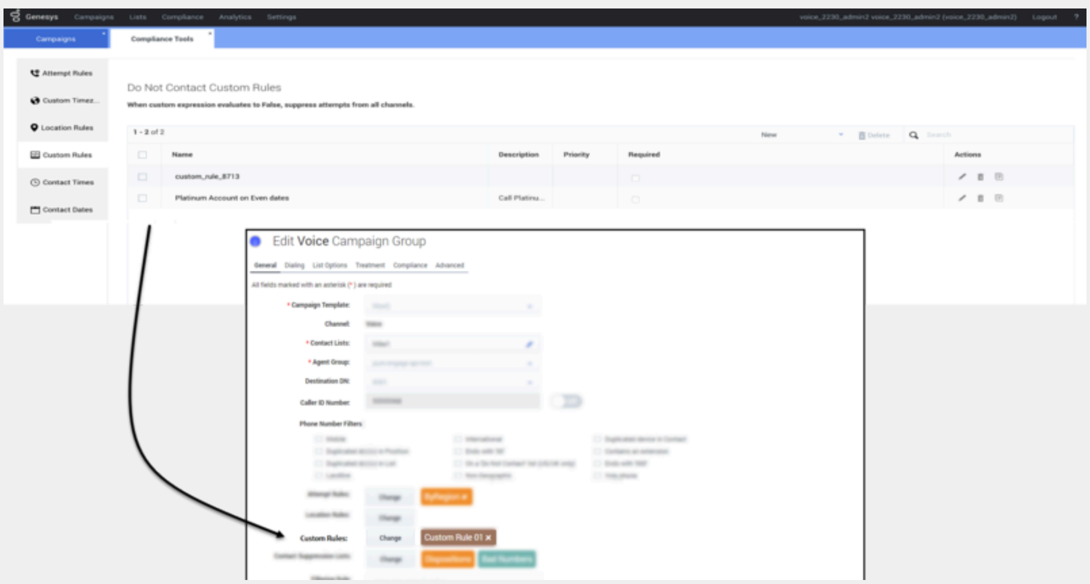
On the Custom Rules tab, select New and specify the custom rule attributes as described above.

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.
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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.

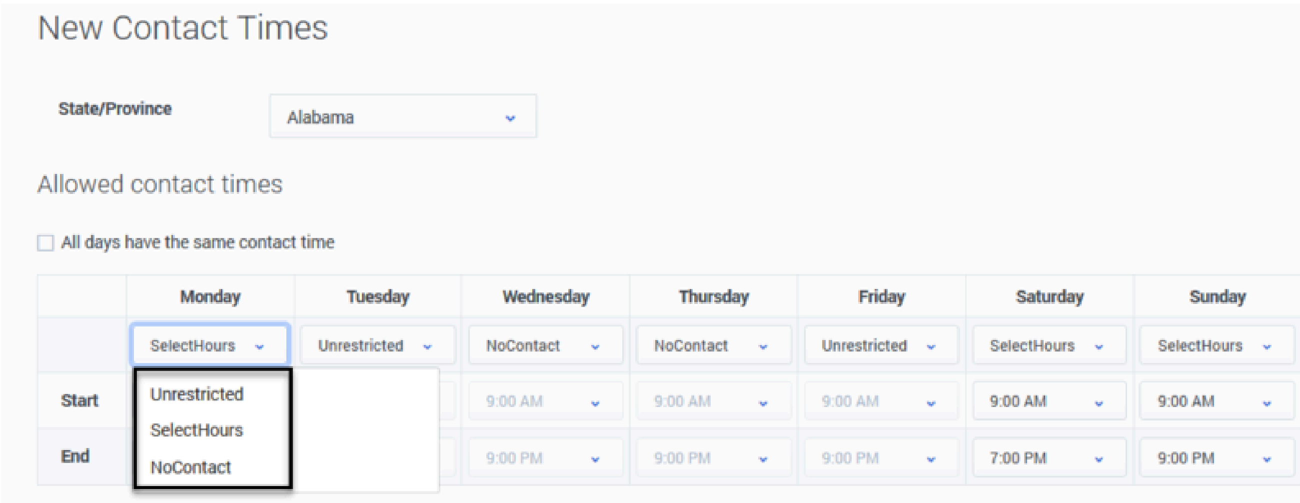
To enable Contact Times by region:

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