CX Contact Help

Create and Manage List Automation Tasks

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Contents

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Important

The content of this document has been moved and is no longer being updated in this location.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

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.

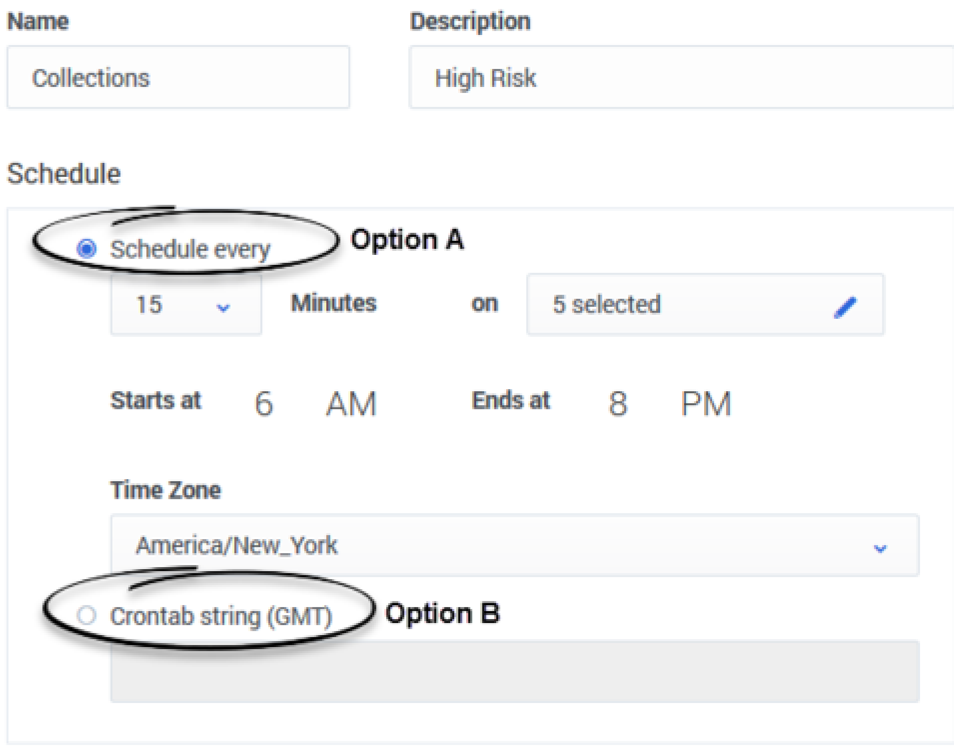
To start, go to the Lists-->List Automation page and click **New**. Give the job a name, a description (optional), and then follow these steps:

- 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:

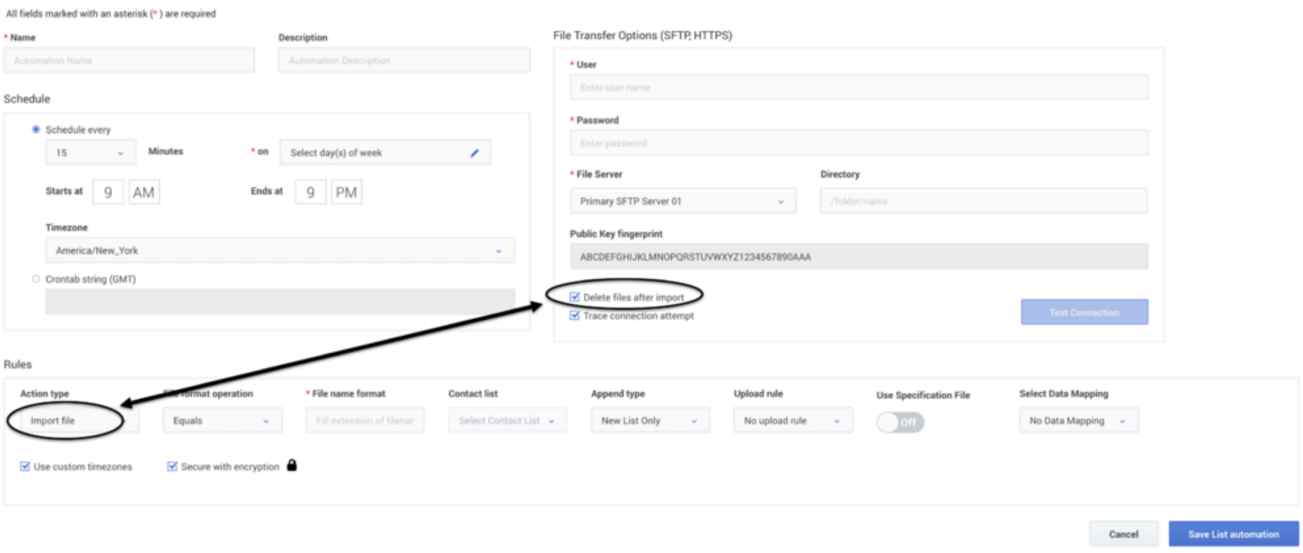
- sftp://hostname/[directory]
- sftp:hostname/[directory]

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.

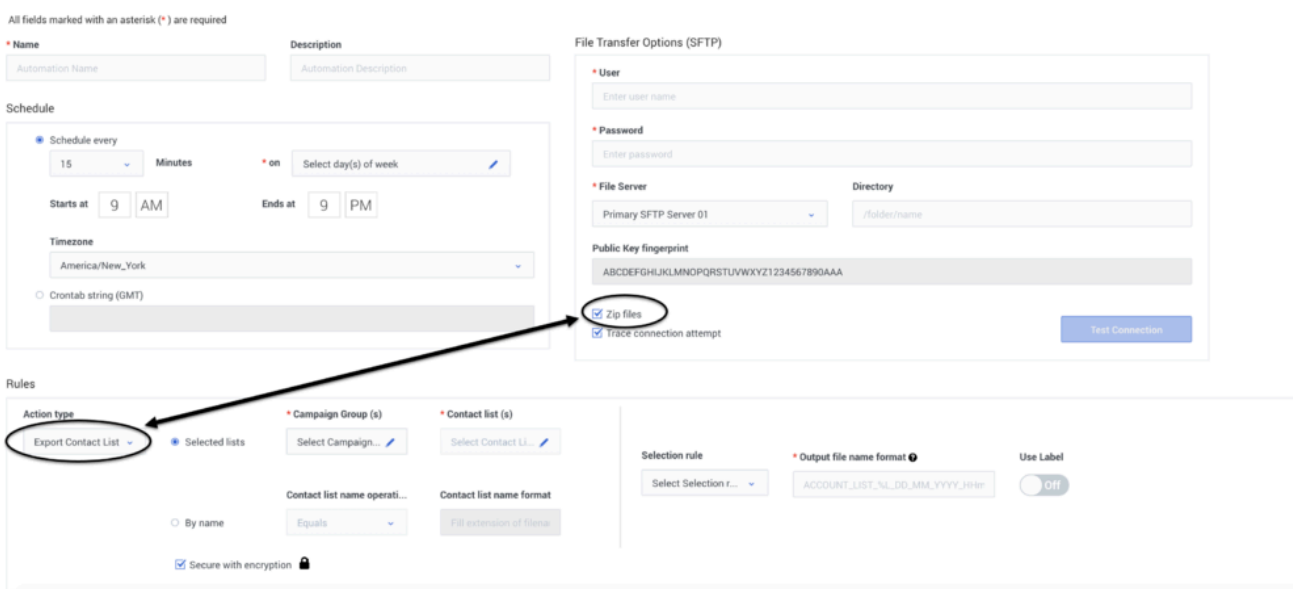
> **Important**
> In a Genesys Engage cloud deployment, specific provisioning steps must be performed in Genesys Engage cloud to enable network connectivity between CX Contact components and the remote SFTP Server. Specifying the SFTP Server's FQDN or IP address is not enough for establishing network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

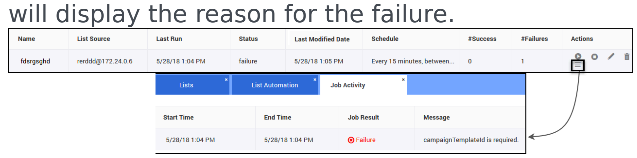
Rule	Triggered Event	Description
	• Suppress file • Export Analytics Data	Also, when this option is selected exported files will also be encrypted with an asymmetric key using PGP Encryption. Related Documentation: Security
Campaign Template	• Send Campaign Group	Select the campaign template that you 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