Genesys Administrator Extension Help

Calling Lists

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Calling Lists

Calling Lists are database tables with records that store a collection of phone numbers and other customer and business-related data. Calling Lists are created in Genesys Administrator Extension, and inherit their structure from the assigned format. See Formats in the *Outbound Contact Deployment Guide*. See additional information about Calling Lists in the *Outbound Contact 8.1 Reference Manual*.

A Calling List must contain Genesys mandatory fields, such as **contact_info** and **contact_info_type**, and can also contain user-defined, custom fields. The campaign name, for example, is stored in a user-defined field, which is specified by the **campaign_name_field** option. A user-defined field may also serve as a customer identifier for Do Not Call requests, as an alternative to the DNC restriction on a customer's phone number.

An unlimited number of Calling Lists can be added to one Campaign, and a Calling List can be added to or deleted from a running Dialing Session for a Campaign. A Campaign can be assigned to multiple Campaign Groups.

Viewing Calling Lists

The **Calling Lists** list shows the Calling Lists that are in your environment. It is sorted in a hierarchy by tenants, configuration units, sites, and folders. To view objects by a particular hierarchy, select the hierarchy type in the drop-down menu above the list.

> **Important**
> Calling Lists that are disabled will appear grayed out in the list.

Configuration Manager respects tenancy permission settings. You can access only those objects that you have been granted permissions and privileges to access.

You can filter the contents of this list in two ways:

- Type the name or partial name of an object in the **Quick Filter** field.
- Click the cube icon to open the **Tenant Directory** filter panel. In this panel, click the Tenant that you want to select. Use the **Quick Filter** field in this panel to filter the Tenant list.

You can sort the items in the list by clicking a column head. Clicking a column head a second time reverses the sort order. You can add or remove columns by clicking **Select Columns**.

Click **Group By** to group objects by various criteria.

To select or de-select multiple objects at once, click **Select**.

Working with Calling Lists

To create a new Calling List object, click **New**. To view or edit details of an existing object, click the name of the object, or click the check box beside an object and click **Edit**. To delete one or more objects, click the check box beside the object(s) in the list and click **Delete**. You can also delete individual objects by clicking on the object and then clicking **Delete**. Otherwise, click **More** to perform the following tasks:

- **Clone**—Copy a Calling List.
- **Move To**—Move a Calling List to another hierarchical structure.
- Enable or disable Calling Lists.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

Click the name of a Calling List to view additional information about the object. You can also set options and permissions, and view dependencies.

Important

Genesys recommends that you not modify records in a calling list while a campaign is loaded or running, because data may be lost.

Procedure: Creating Calling List Objects

Steps

1. Click **New**.
2. Enter the following information. For some fields, you can either enter the name of a value or click **Browse** to select a value from a list:
   - **Name**—The name of the Calling List. You must specify a value for this property, and that value must be unique within the Configuration Database (in an enterprise environment) or within the Tenant (in a multi-tenant environment).
   - **Description**—A brief description of the Calling List.
   - **Table Access**—The Table Access to which the Calling List refers. You must specify a value for this property.
   - **Log Table Access**—The Table Access of the Log Table type. Genesys recommends dedicating a single Log Table Access to all Calling Lists associated with one campaign.
   - **Filter**—The Filter to be applied to this Calling List. If you specify the Filter, associate it with

the same format as the Table Access.

- **Calling Time From**—Not used at the list level at this time. The default is **8:00:00 AM**.
- **Calling Time To**—Not used at the list level at this time. The default is **6:00:00 PM**.
- **Script**—The Script Property defines the Script Object, which contains all of the attributes that are required by Agent Scripting. For more information, see the section, "Attaching Script Information to OCS User Events and Telephony Events" in the *Outbound Contact Reference Manual*.
- **Maximum Attempts**—The maximum number of attempts to call a single record in this Calling List during one campaign if a Treatment associated with this campaign results in re-dialing a particular record. You must specify a value for this property, and that value must be other than zero. The default value is `10`.
- **Tenant**—In a multi-Tenant environment, the Tenant to which this object belongs. This value is automatically set to the Tenant that was specified in the **Tenant Directory** field in the object list.
- **State Enabled**—If selected, indicates that the object is in regular operating condition and can be used without any restrictions.

3. Click **Apply** to save this Calling List.
4. For each Treatment to be associated with this Calling List:
    a. Click the **Treatments** tab and click **Add**.
    b. Navigate to the appropriate folder, if necessary, and do one of the following:
        - To associate this Calling List with an existing Treatment, select it from the list of Treatments.
        - To associate this Calling List with a new Treatment, click **+** to create the Treatment in this folder and then select it from the list.
5. For each Campaign to be added to this Calling List:
    a. Click the **Campaigns** tab and click **Add**.
    b. Navigate to the appropriate folder, if necessary, and do one of the following:
        - To add an existing Campaign to this Calling List, select it from the list of Campaigns.
        - To add a new Campaign to this Calling List, click **+** to create the Campaign in this folder and then select it from the list.
6. For each Format to be associated with this Calling List:
    a. Click the **Formats** tab and click **Add**.
    b. Navigate to the appropriate folder, if necessary, and do one of the following:
        - To associate this Calling List with an existing Format, select it from the list of Formats.
        - To associate this Calling List with a new Format, click **+** to create the Format in this folder and then select it from the list.

7. After you have finished creating the Agent Group, do one of the following:
    - Click **Save** to accept the changes and return to the list of Calling Lists.
    - Click **Apply** to accept the changes and return to the **General** tab of this Calling List.
    - Click **Cancel** to discard the changes.