

# **GENESYS**<sup>®</sup>

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# Genesys Administrator Extension Help

Campaigns

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# Campaigns

A Campaign is a flexible master plan that organizes Calling Lists and Agent Groups (or Place Groups) for dialing calls and handling call results. A Campaign can be assigned to multiple Campaign Groups. See additional information in the Outbound Contact Deployment Guide.

## Viewing Campaigns

The **Campaigns** list shows the Campaigns 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

Campaigns that are disabled 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**.

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

## Working With Campaigns

To create a new Campaign 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 Campaign.
- **Move To**—Move a Campaign to another hierarchical structure.

- Enable or disable Campaigns.
- Create a folder, configuration unit, or site. See Object Hierarchy for more information.

Click the name of an Campaign to view additional information about the object. You can also set options and permissions.

## Procedure: Creating Campaign 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 Campaign. 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 Campaign.
  - Script—Defines the Script object that contains all of the attributes that are required by Agent Scripting.
  - 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 the Campaign.
- 4. For each Calling List to be used for this Campaign:
  - a. Click the **Calling List** tab and click **Add**.
  - b. Navigate to the appropriate folder, if necessary, and do one of the following:
    - To add an existing Calling List to this Campaign, select it from the list of Calling Lists.
    - To add a new Calling List to this Campaign, click + to create the Calling List in this folder and then select it from the list.
- 5. After you have finished creating the Campaign, do one of the following:
  - Click **Save** to accept the changes and return to the list of Campaigns.
  - Click **Apply** to accept the changes and return to the **General** tab of this Campaign.

• Click **Cancel** to discard the changes.