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Outbound Contact Deployment Guide

Records

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Records

A *record* is a row in a Calling List table. Among its 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.

A record can contain as many custom fields as needed as defined in a Calling List Format object.

Chained Records

Chained records are multiple records for the same customer in a calling list. These records typically contain alternative phone numbers such as home, business, and cellular phone. In addition, each record in the same chain can have different time boundaries and time zone information, and it can also have different values stored in its business data fields.

Flexible Prioritization of Record Types

Flexible prioritization means that a user can assign his or her own order of priority to specific record types for dialing purposes.

A record type with a higher priority is dialed before a record with a lower priority. Genesys Administrator (Outbound) automatically passes the priority for the record type and its parameters to Outbound Contact Server with events.

The user can prioritize the following record types in the Predictive/Progressive dialing mode and in the Preview dialing mode.

- General records--All records are initially marked General in an Outbound Contact calling list. The status may change after the record has been dialed. Either an agent or a treatment in response to a call result can change the status of a record.
- Campaign Callback records--An agent reschedules a campaign callback record at the customer's chosen time. The callback may be dialed automatically or delivered to an agent's desktop softphone as a preview record depending on the value of the predictive_callback option. See [Outbound Contact Configuration Options](#) for more information about this option.

Note:

See the "Communication Protocols" chapter of the *Outbound Contact Reference Manual* for information on the events distributed when

rescheduling records.

- Campaign Rescheduled records--Treatments reschedule these records based on the detected call results. A campaign rescheduled call is dialed automatically and handled by any agent who is working on that particular campaign.

Record types can be prioritized in Genesys Administrator (Outbound Contact section) or in a third-party application that manages the campaigns.

The following options define the default record priorities for Outbound Contact:

- `default_campaigncallback_priority`
- `default_campaignrescheduled_priority`
- `default_general_priority`

These options must be configured in the Outbound [section](#) of the Application, Campaign or Campaign Group objects. Wherever these options are configured, they apply to Campaign Group objects.

Priorities set at the Campaign Group level have the most precedence while those set at the Application level have the least. In addition:

- Values set at the Application level are applicable for all Campaign Groups.
- Values set at the Campaign level should be applicable for all Campaign Groups created for the given Campaign.

The priorities set by the options are displayed as a grid in Genesys Administrator at Operations > Outbound Contact > Dialing Sessions > Priorities. The same grid also appears for the associated Sequence on the Sequences tab, and for the associated Schedule at Provisioning > Outbound Contact > Schedules, if the associated Campaign Group is part of the Sequence or has an assigned Schedule. In all cases, the grid is read-only.

Note:

You can also configure SCXML treatments to select which record in a chain is dialed first and which is dialed next. For more information, see [SCXML-Based Treatments](#).

If you are using a third-party application (instead of Genesys Administrator) to communicate with OCS, you must use the KeyValue List from the Genesys Common Library with the events to transfer the priority information to OCS.

You must define the priorities in the following user requests, that are sent through the Communication DN:

- CM_ReqLoadCampaign
- CM_ReqStartDialing
- CM_ReqSetDialingMode

For more information about these user requests, see "Communication DN API" in the *Outbound Contact Reference Manual*.

Note that flexible prioritization does not apply to Personal Callback records or Personal Rescheduled records. An agent schedules or reschedules a personal call back record at the customer's chosen time. OCS automatically delivers a Personal record to the agent's desktop at the specified time, and the same agent who initially handled the record processes the Personal Call Back or Personal Rescheduled record.