Callback Administrator's Guide

Configuring Country and Number Validation rules

10/9/2025

This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Agent Workspace Agent's Gui

Outbound campa

Contents

- 1 Configuring Country and Number Validation Rules
- 2 Assigning rules to queues
- 3 Editing and deleting rules
- 4 Testing a number pattern

- Administrator

As a Callback administrator, you want the added security of blocking callbacks to certain numbers and countries. To do that, you'll configure a Country and Number Validation rule in Genesys Callback and assign it to at least one callback queue. You can test your rules before assigning them to a queue or when troubleshooting. You can also edit and delete existing rules, as required.

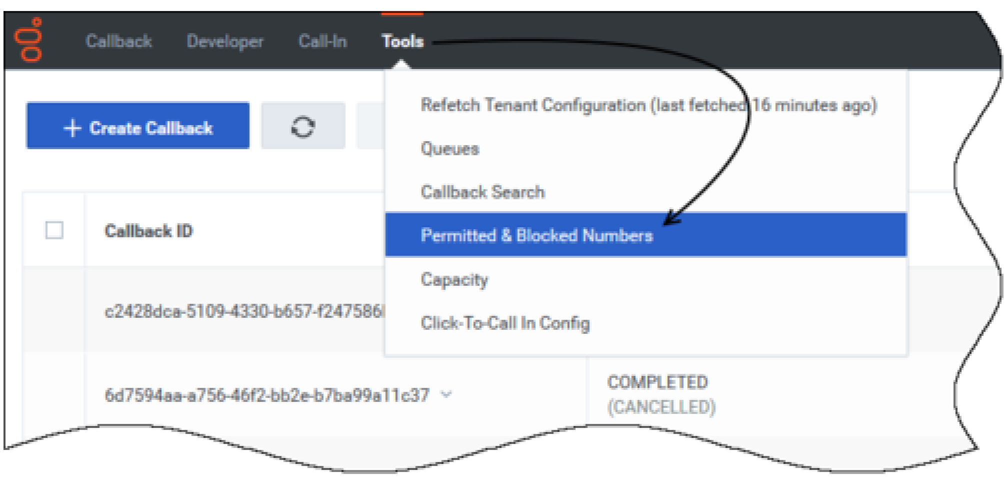
Related documentation:

-

Important

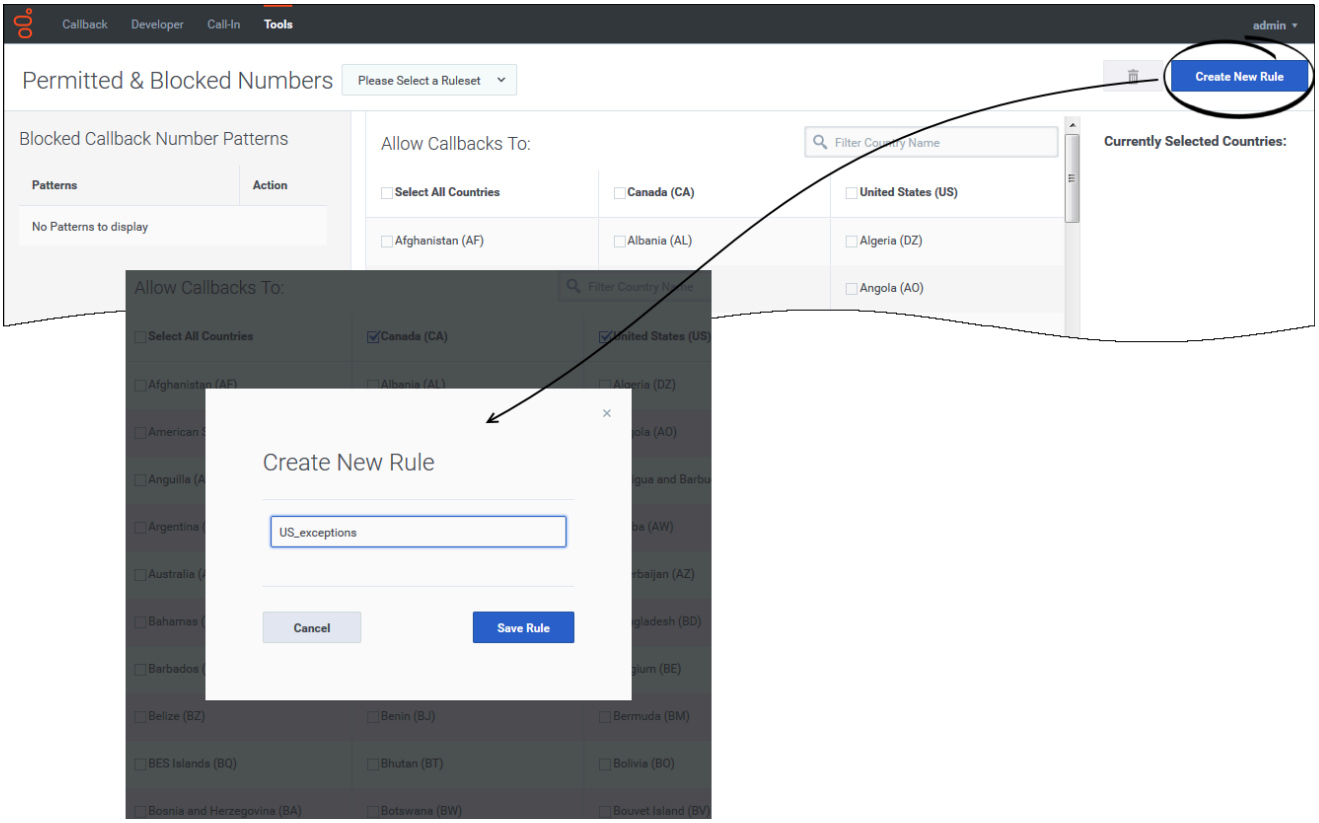
To create, edit, or delete country and number validation rules, you must be a member of the **Callback Administrator**, **Callback Developer**, or **Callback Supervisor** role.

To avoid initiating callbacks to certain countries or to numbers that you know to be fraudulent, you can configure country and number validation rules on the **Tools** > **Permitted & Blocked Numbers** page, and then assign those rules to queues on the Callback Queues page. You can create a rule to specify the list of countries to which you permit callbacks for specific queues. You can also optionally enhance a rule by defining simple or complex (regular expression) numeric patterns that will block callback attempts to matching numbers.

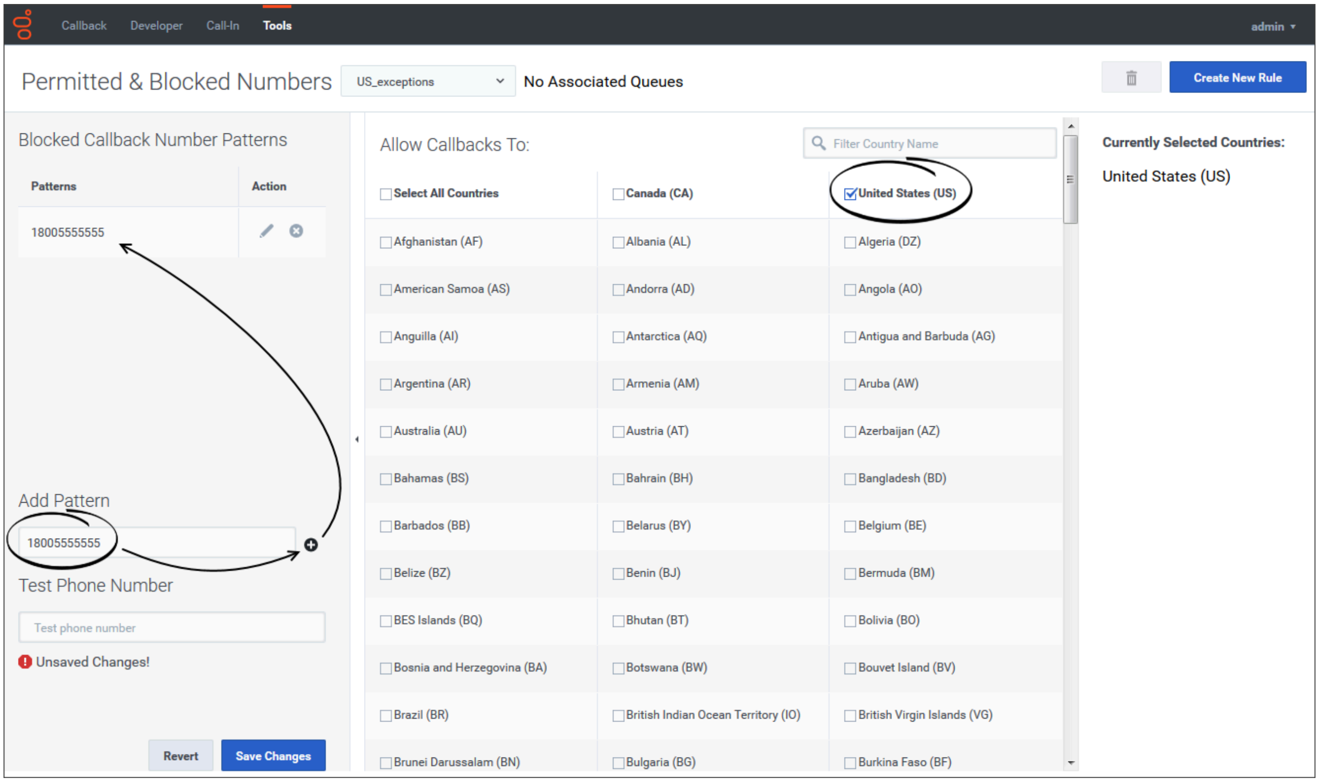


Once a rule is configured, you can assign it to as many queues as necessary. It is important to note, though, that you can assign only one rule to each queue. Before creating a rule, consider to which queue or queues you will assign it and make sure that the rule incorporates the countries to which you permit callbacks for that queue as well as any numeric patterns in any of those countries that you want to block. Rules are checked before the system initiates a callback.

Configuring Country and Number Validation Rules



The first step in creating a new country and number validation rule is to give the rule a name. Later, you will need to pick the rule from a list when you assign it to a queue, so make sure the name is descriptive enough for you to understand what it allows and denies.



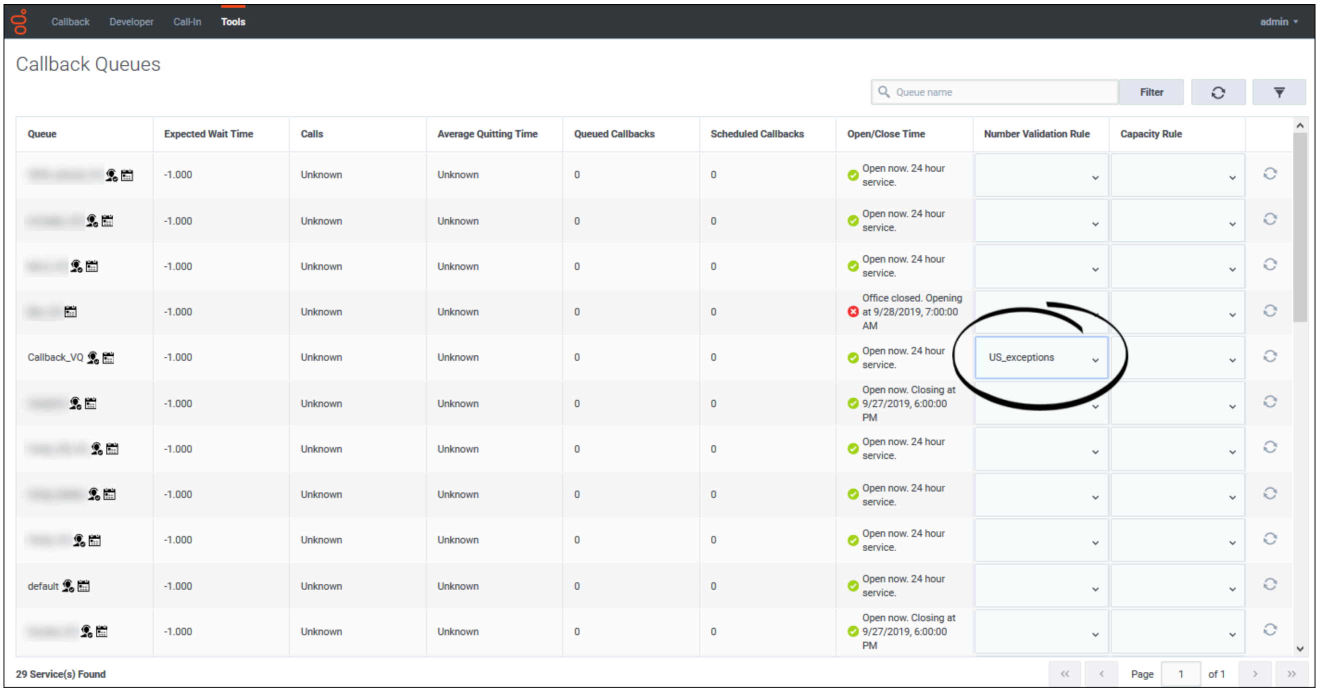
When creating a rule, you must select at least one country on the **Permitted & Blocked Numbers** page. You can enter *blocked number patterns* only after you make country selections. Adding a country to the rule means that you allow callbacks to that country. For countries that are not added to a rule, no callback attempt will be initiated on the queue or queues to which the rule is applied.

After you have selected the countries to which you allow callbacks, enter any patterns that you want to block. Patterns must be entered as regular expressions. For example, if you have a list of suspicious phone numbers for the selected countries and you do not want the system to make callback attempts to those numbers, then add those to the rule.

The figures on this page show the addition of specific numbers, but you could enter `^1234[0-9]+`, which would match any phone number that starts with 1234. While a rule must contain at least one country, the addition of blocked number patterns is optional.

To add a blocked number pattern, simply enter it in the field and click "plus" (). You must enter patterns individually; that is, enter a pattern and add it to the rule before entering another pattern.

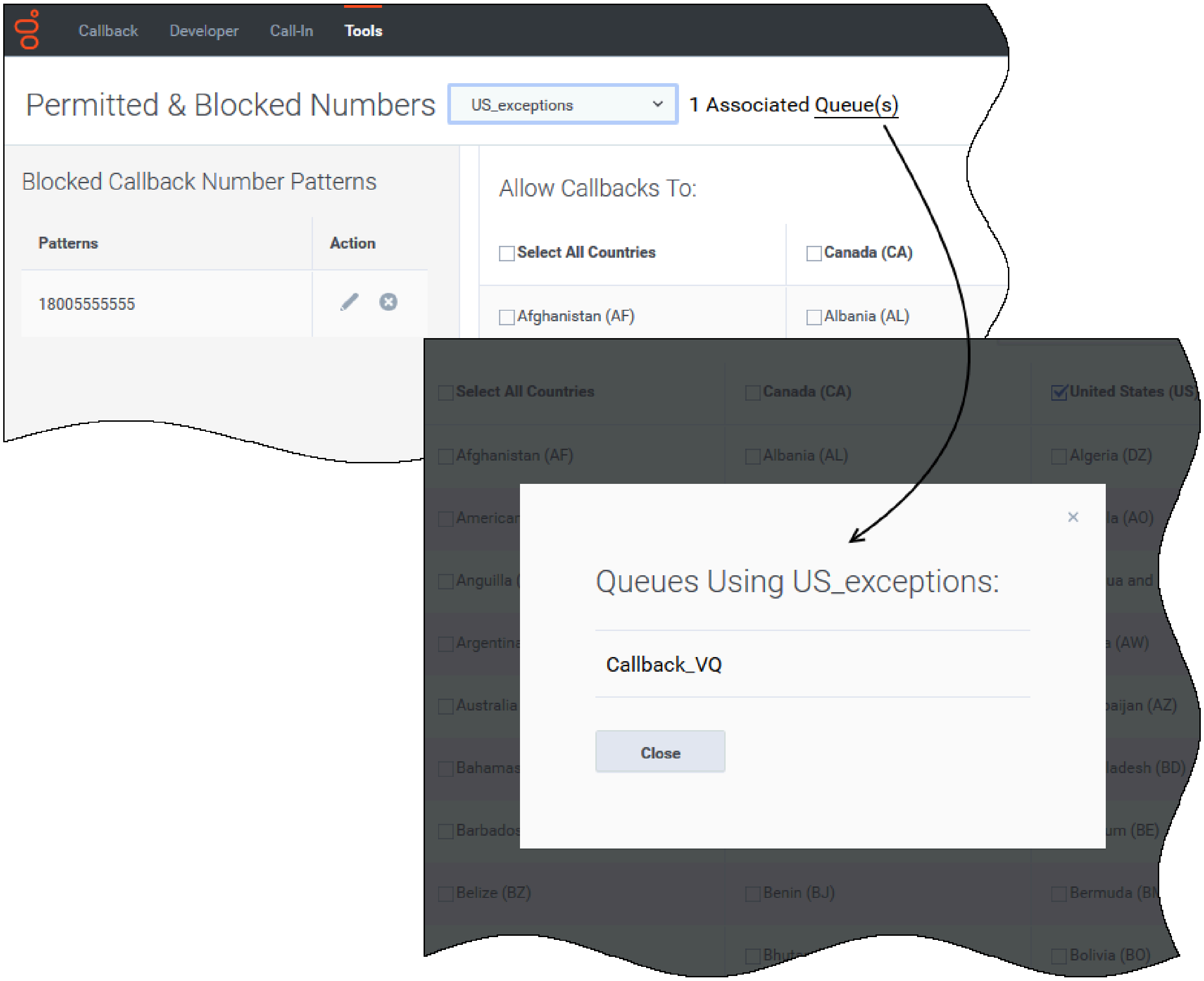
Assigning rules to queues



After you have configured at least one rule, you can assign the rules to your queues. You can assign a rule to multiple queues, but you can assign only one rule to each queue.

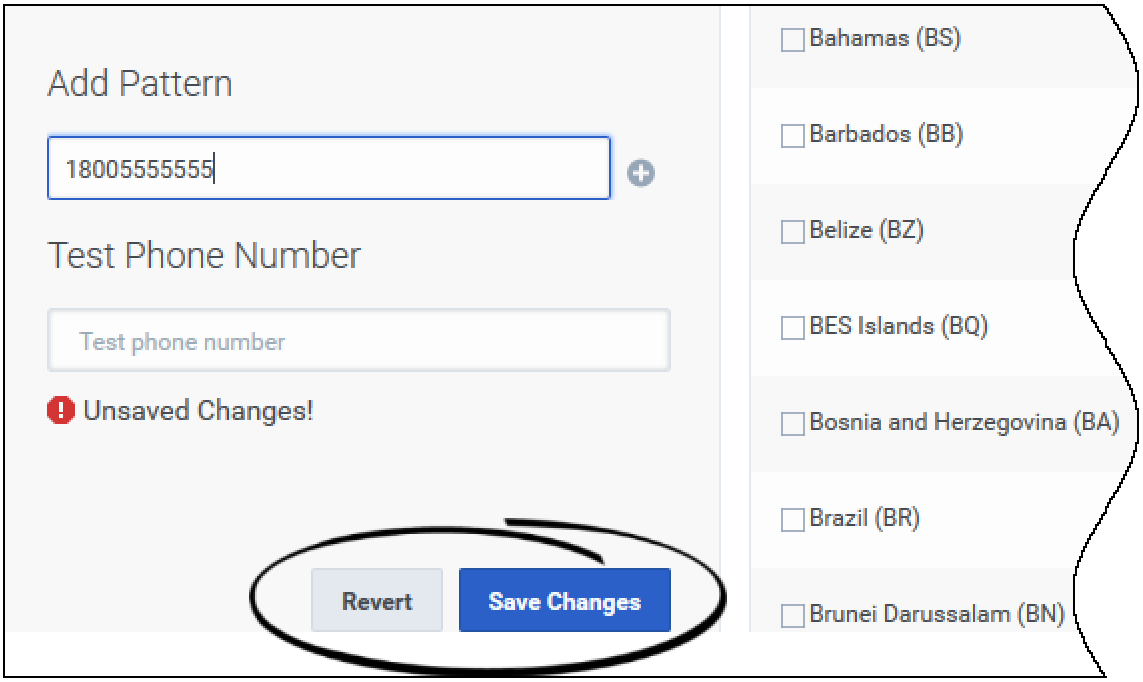
To assign a rule to a queue, navigate to the **Tools** > **Queues** page in your Callback UI. Locate a queue to which you want to assign a rule. You might need to filter the list of queues to locate what you're looking for. Once you find the queue, open the drop-down menu in the **Number Validation Rule** column. Select the rule that you want to assign to the queue. The rule is applied to the queue immediately and that change to the queue is saved automatically.

Editing and deleting rules



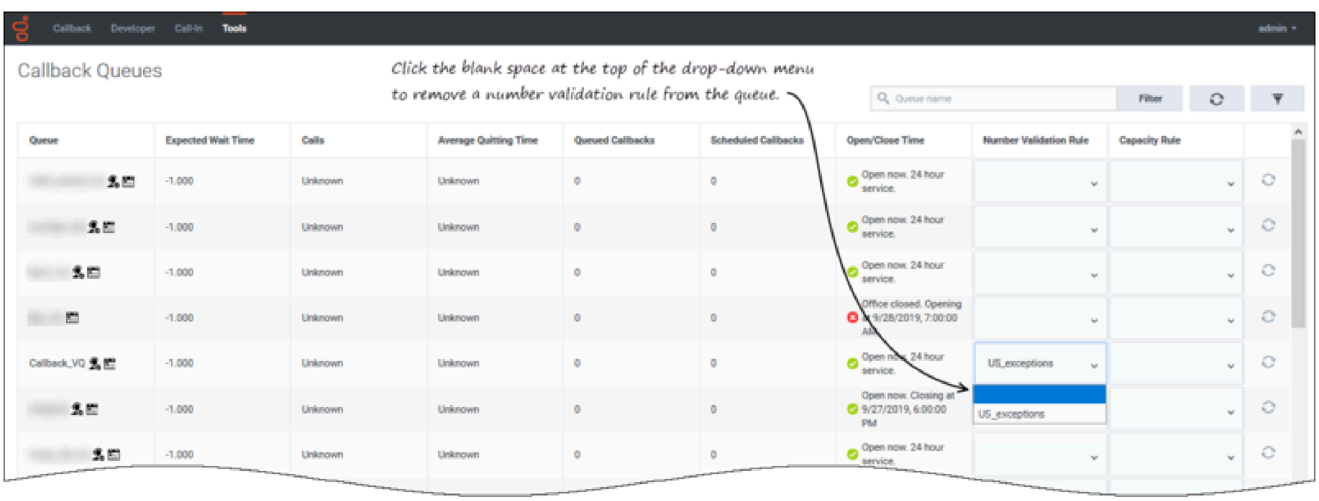
For your reference, each rule displays the list of queues to which the rule is assigned (or indicates that the rule is not yet assigned) so you will know which queues, if any, you are impacting when you edit a rule.

Changes that you make to a rule's definition are applied to any queue to which the rule is assigned as soon as you click **Save Changes**. If, while editing a rule, you decide that you want to discard your changes – perhaps you have made some mistakes or you discover that you are editing the wrong rule – click **Revert** to return the rule to its last-saved configuration.

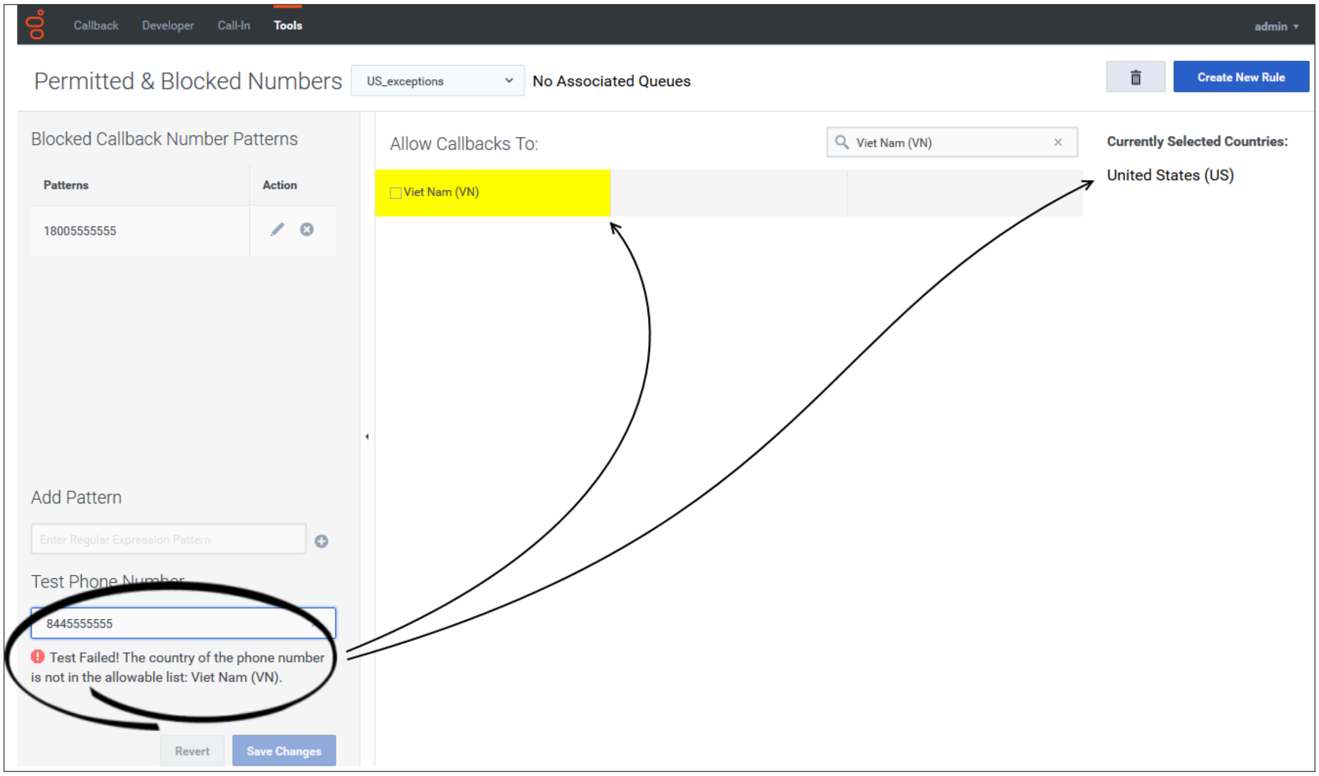


To help you manage impacts to queue activity, the Callback UI does not allow you to delete a rule that is assigned to a queue. Use the list of queues associated with the rule to help you determine if the rule can be safely removed from each assignment.

Navigate to the **Callback Queues** page in the Callback UI to remove a rule from a queue. Once the rule is removed from all queue assignments, you can delete it.



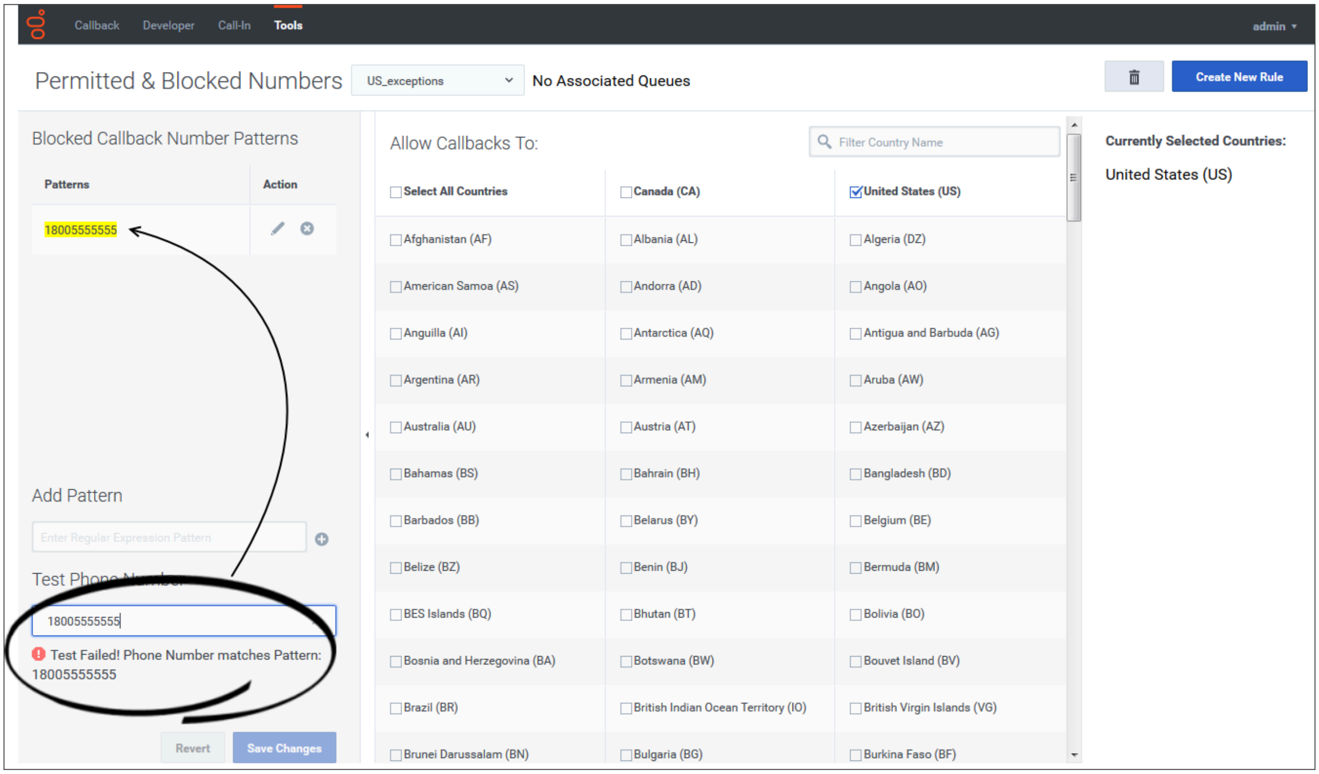
Testing a number pattern



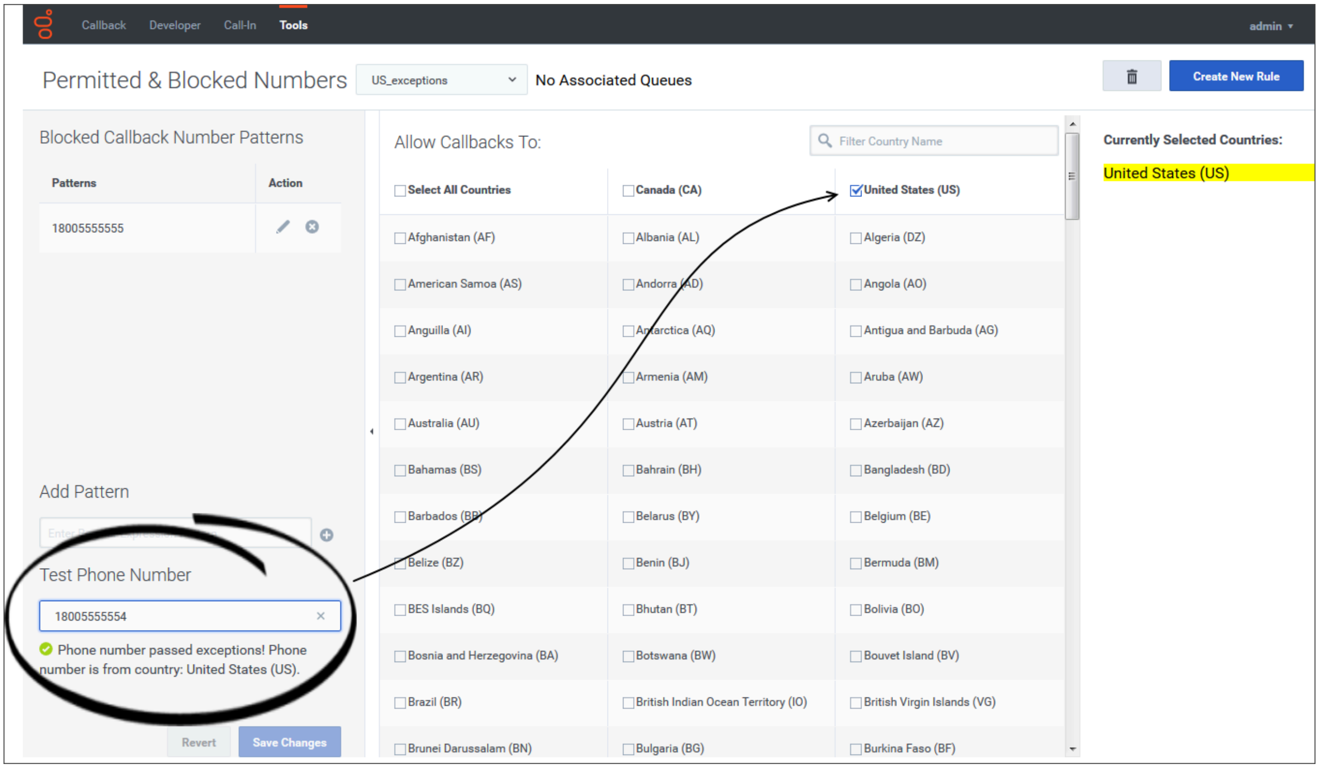
After you have created and saved a rule, you can use the rule to validate any number quickly using the testing feature on the **Permitted & Blocked Numbers** page. For example, you might be troubleshooting an error and you want to see if a rule might be interfering with the callback.

Enter a number in the **Test Phone Number** field. The number fails the rule's validation test if the number belongs to a country that is not added to that rule or if the number matches any one of the defined blocked number patterns.

If the number fails the check against allowable countries, then the system returns this reason for failure and does not validate the number against the blocked number patterns, even though the number might also fail that test.



If a number passes the country validation test, then it is checked against the blocked number patterns.



If the number belongs to a country to which callbacks are allowed for that rule and the number is not listed within the blocked number patterns, then the system validates that the number is acceptable for callback attempts.

Contents

- 1 What types of campaigns are available?
- 2 Video Tutorial: Outbound Campaigns
  - 2.1 Outbound Campaign Overview
  - 2.2 Automatic record retrieval (Predictive and Progressive)
  - 2.3 Manual record retrieval (Preview)
  - 2.4 Semi-automatic record retrieval (Push-Preview)
  - 2.5 Semi-automatic record retrieval (Direct Push-Preview)
- 3 How do I use the My Campaigns tab?
- 4 How do I work with Record Information?
- 5 How do I work with Progressive and Predictive campaigns?
- 6 How do I work with Preview campaigns?

- 7 How do I work with Push-Preview campaigns?
- 8 How do I work with Direct Push-Preview campaigns?
- 9 How do I schedule callbacks for a campaign?
- 10 What happens if the contact is on a Do-Not-Call list?
- 11 What next?
- 12 Top 5 topics

- Agent
- Supervisor

As an agent, you might work on campaigns (for example, collections, telemarketing, or fundraising) where you make outbound calls to contacts. You can view and manage your campaigns from the **My Campaigns** tab.

Related documentation:

-

What types of campaigns are available?

You might be working with one of the following campaign types:

- Progressive or Predictive campaigns, in which the system automatically sends you a number to dial.
- Preview campaigns, in which you manually request (or *pull*) a number to dial from the system.
- Push-Preview campaigns, in which the system automatically sends you a record to preview, then you click to connect the call.
- Direct Push-Preview campaigns, in which Outbound Contact Server automatically sends you a record to preview, then you click to connect the call.

Video Tutorial: Outbound Campaigns

Here are four tutorial videos that give you a quick overview of being an agent in an Outbound Campaign. The first video introduces Outbound Campaigns, the second demonstrates Predictive and Progressive (automatic) campaigns, the third demonstrates Preview (manual) campaigns, and the fourth demonstrates Push-Preview (semi-automatic) campaigns.

Outbound Campaign Overview

Link to video

Automatic record retrieval (Predictive and Progressive)

Link to video

Manual record retrieval (Preview)

Link to video

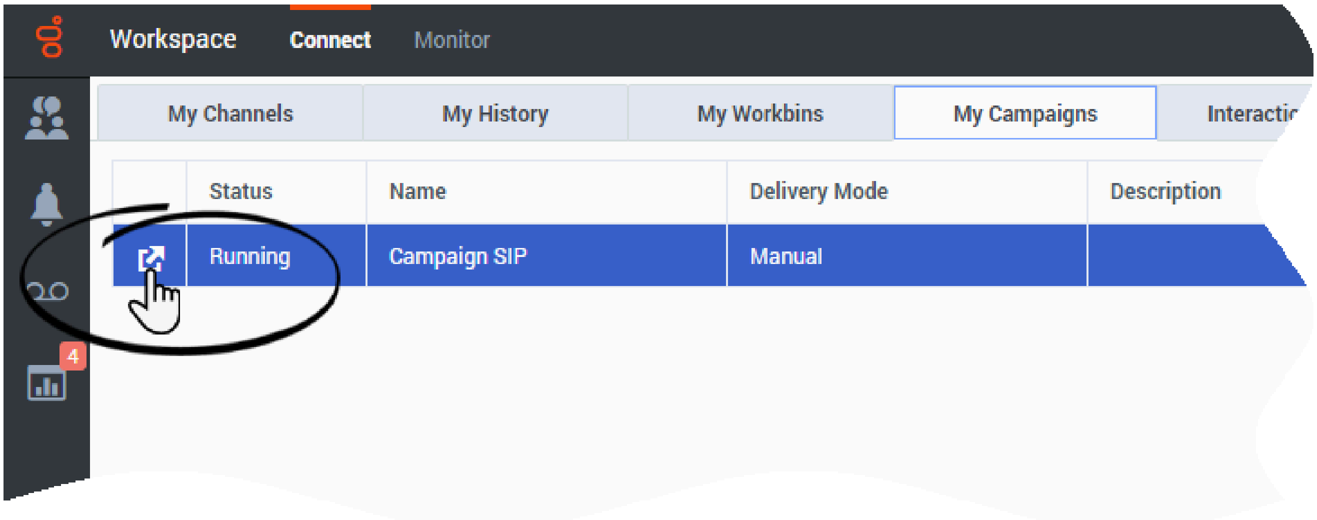
Semi-automatic record retrieval (Push-Preview)

Link to video

Semi-automatic record retrieval (Direct Push-Preview)

Link to video

How do I use the My Campaigns tab?



You can find the **My Campaigns** tab in the **Connect** group of the Main Window.

This tab lists all the campaigns that are active or running to which you belong.

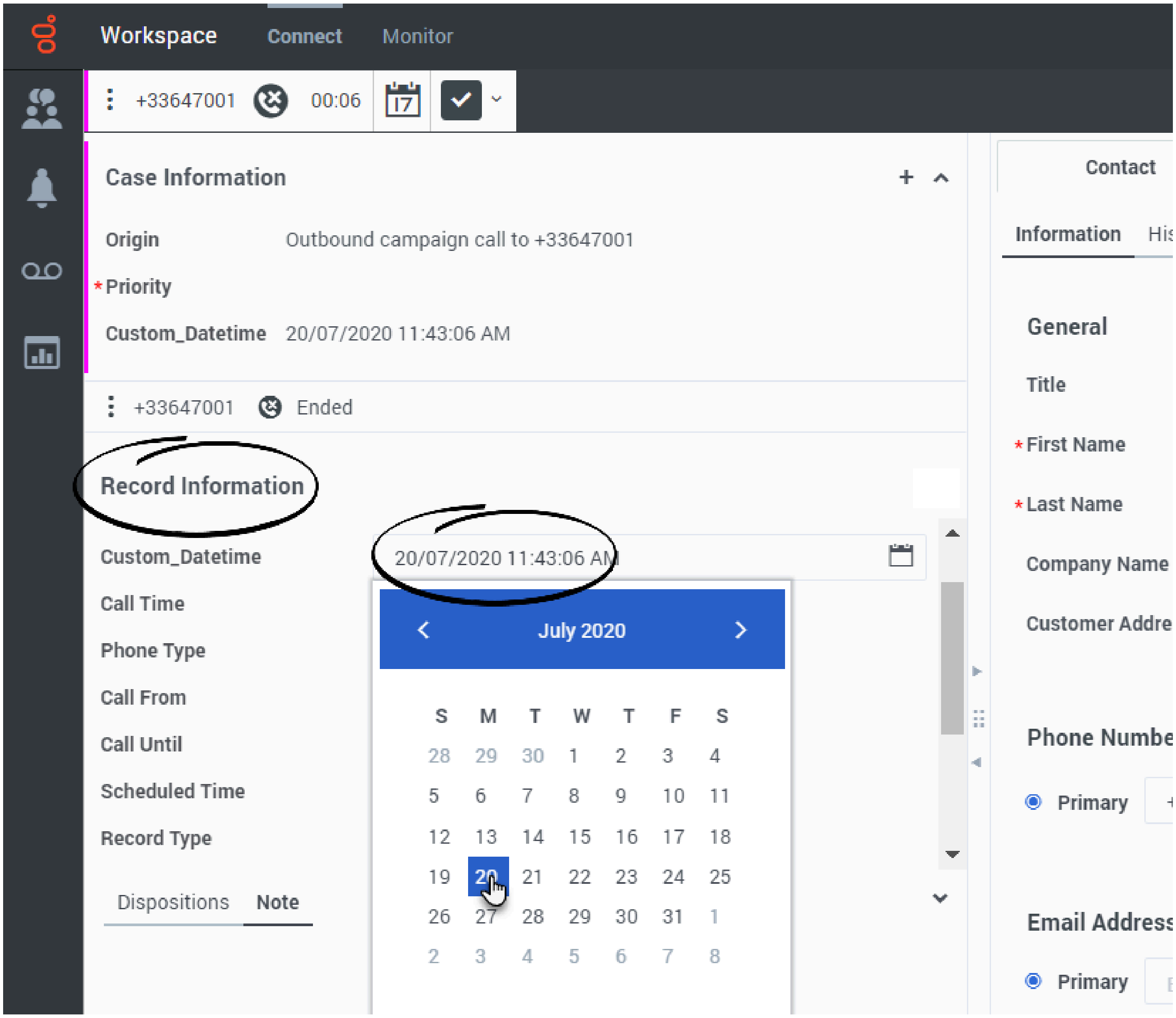
The table contains information about each campaign, including:

- **Status** (Active or Running)
- **Name**
- **Delivery Mode** (Manual or Automatic)
- **Description** of the campaign provided by your company.

When you want to get a new calling record, select the campaign you want to work on and click **Get Record** ().

In some campaigns, records are delivered to you automatically whenever your status is **Ready**. If you have selected **Done and Stop** in a campaign and you are ready to resume receiving records, select the campaign you want to work on and click **Get Record**.

How do I work with Record Information?



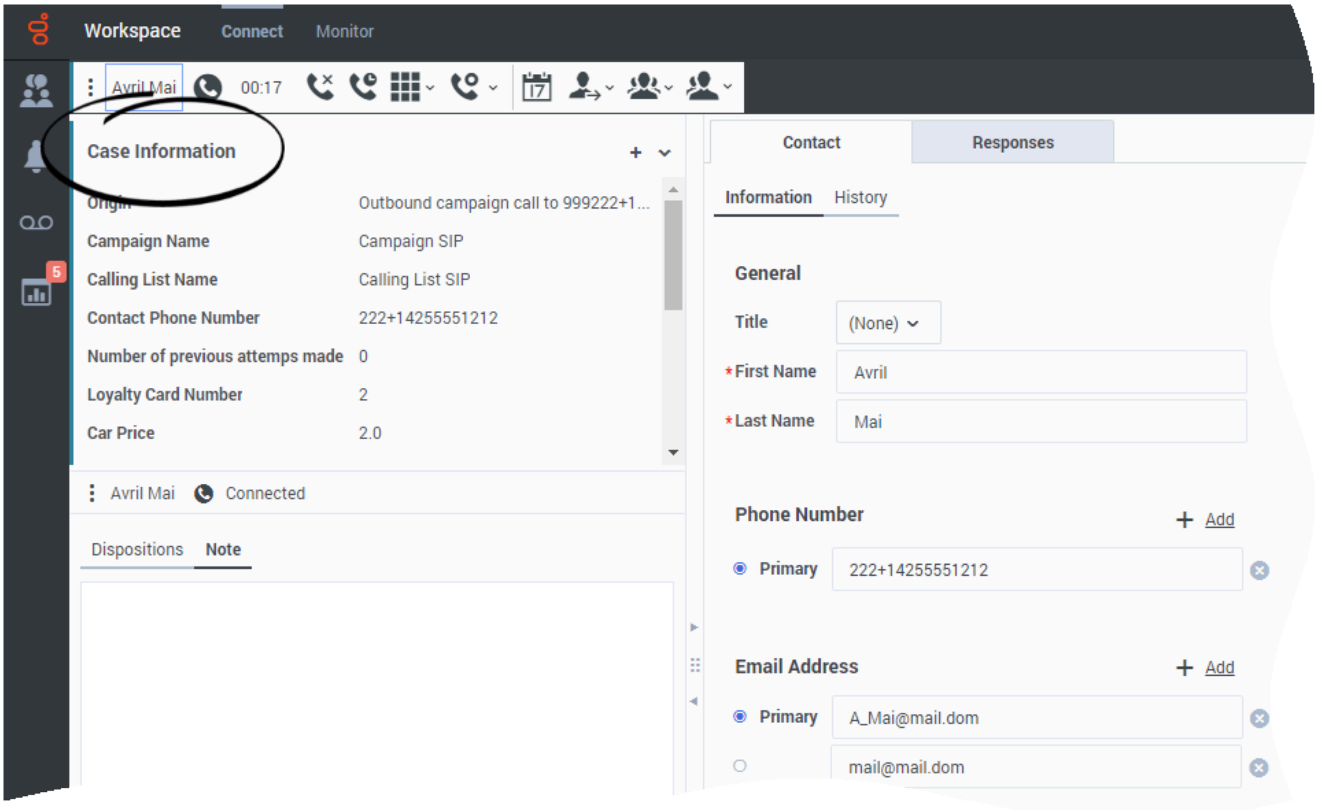
Some Outbound records include the **Record Information** view. It appears below the call status area (below the **Case Information** block).

The **Record Information** area might contain both editable and non-editable fields set up by your organization to enable you to add information to the call record. A pencil icon next to a field indicates that you can edit it. Editable fields include the following:

- Check boxes
- Text fields that you fill in
- Calendar pickers that let you set dates and times

- Drop-down lists from which you can make selections.

How do I work with Progressive and Predictive campaigns?



In campaigns using Progressive and Predictive dialing modes, outbound calls are directed to your workstation and dialed automatically.

You receive a pop-up notification each time an administrator loads or starts a new campaign that you are part of. When you get the **Campaign Started** pop-up, click **OK** to close the notification.

If your status is Ready, a new interaction preview appears. You can then **Accept** to connect the call, or **Reject** to return the record to the top of the calling list. If you do nothing, the interaction goes back to the top of the calling list. In some environments, if you do not accept or reject the record notification before a certain time interval, the record is automatically rejected and your status is set to **Not Ready**.

When you accept the record, you are connected to the outbound call *after* the contact answers the phone. The **Origin** of the call is the name and or number of the contact.

When you're connected to the contact, you can view the campaign call information, the Call Status, and the available Call Actions. Use the standard call controls to manage the call.

How do I work with Preview campaigns?

In campaigns using Preview dialing mode, you request a record from the system and then dial the contact. You can preview the case information and other details *before* you start the call.

You receive a pop-up notification each time an administrator loads or starts a new campaign that you are a part of. When you get the **Campaign Started** pop-up, you can choose:

- **Get Record** to retrieve a contact record from the campaign list.
- **OK** to close the notification. (With this option you must retrieve a record manually. Go to **My Campaigns**, select the campaign you want to use, and select **Get Record**.)

When you have previewed the record:

Click **Call** () to call the contact. When the call is connected, you can monitor the call status and use the standard voice call controls to manage the call.

Click **Decline** () to decline the record. You can then choose **Call this contact later** to return the record to the campaign list or **Do not call this contact** to remove the contact from the campaign list.

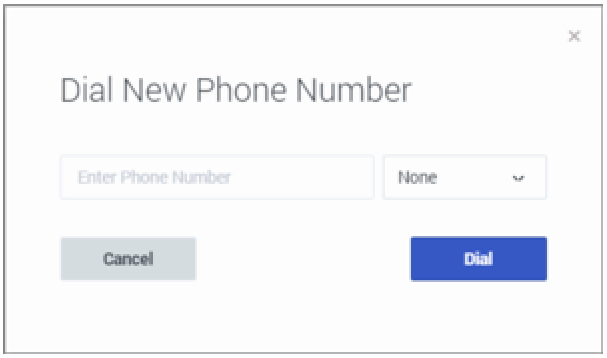
Click **Done and Stop** () to stop receiving previews (**Done and Stop**). To start receiving previews again, go to **My Campaigns**, select the campaign you want to use, and select **Get Record**.

If asked, select the caller ID details you want to use.

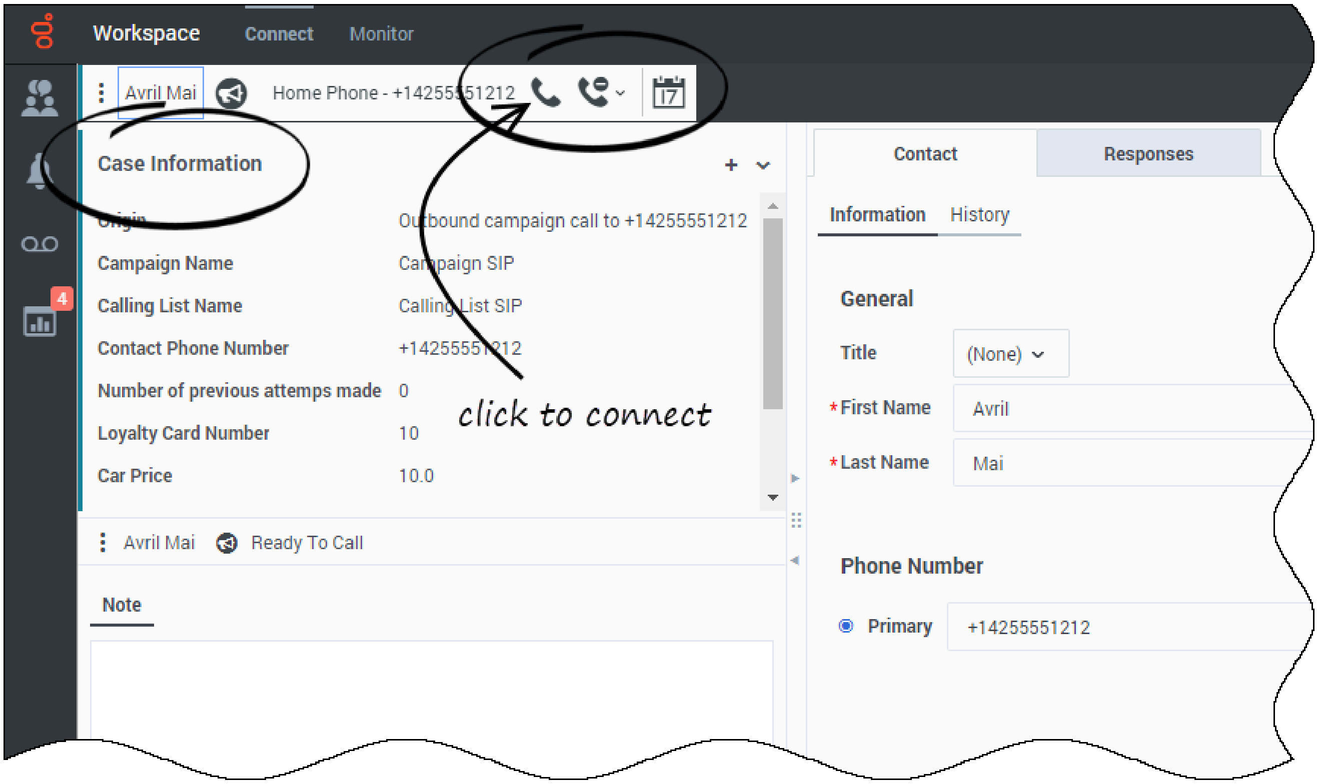
In some environments, the Preview campaign has a time limit during which you can preview the interaction before it is dialed automatically. In this case, a timer next to the **Party Action** menu that counts down the time until the call is automatically connected if you do not click **Call** (). Some

Preview campaigns connect the call automatically.

You might be required to manually dial a call due to local regulations. In this case, click the contact's phone number at the top of the interaction and either select the phone number, or, if you are required to do so, select **Dial New Phone Number**. When the **Dial New Phone Number** window is displayed, type the phone number into the **Enter Phone Number** field, select the phone number type from the drop-down menu, then click **Dial**.



How do I work with Push-Preview campaigns?



In campaigns using Push-Preview dialing mode, a record is delivered to your desktop automatically from the system and then you dial the contact. You can preview the case information and other details *before* you start the call. You must be in a **Ready** status to receive records.

Important

In the **My Channels** tab, Push Preview is a separate channel from Voice. Set the **outbound preview** channel to **Ready** to receive records.

You receive a pop-up notification each time an administrator loads or starts a new campaign. When you get the **Campaign Started** pop-up, click **OK** to join the campaign.

If your status is Ready, a new interaction preview appears. You can then **Accept** to connect the call, or **Reject** to return the record to the top of the calling list. If you do nothing, the interaction goes back to the top of the calling list. In some environments, if you do not accept or reject the record notification before a certain time interval, the record is automatically rejected and your status is set to **Not Ready**.

After you have previewed the record:

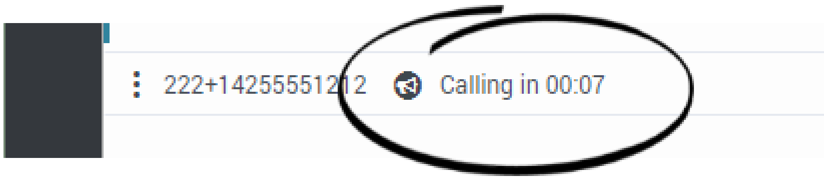
Click **Call** () to call the contact. When the call is connected, you can monitor the call status and use the standard voice call controls to manage the call.

Click **Decline** ( ) to decline the record. You can then choose **Call this contact later** to return the record to the campaign list or **Do not call this contact** to remove the contact from the campaign list.

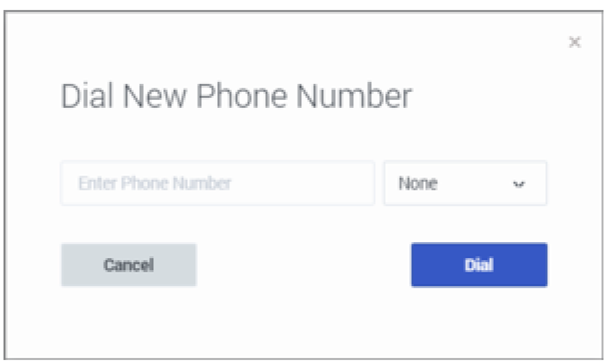
Click **Done** ( ) to close a record.

If asked, select the caller ID details you want to use.

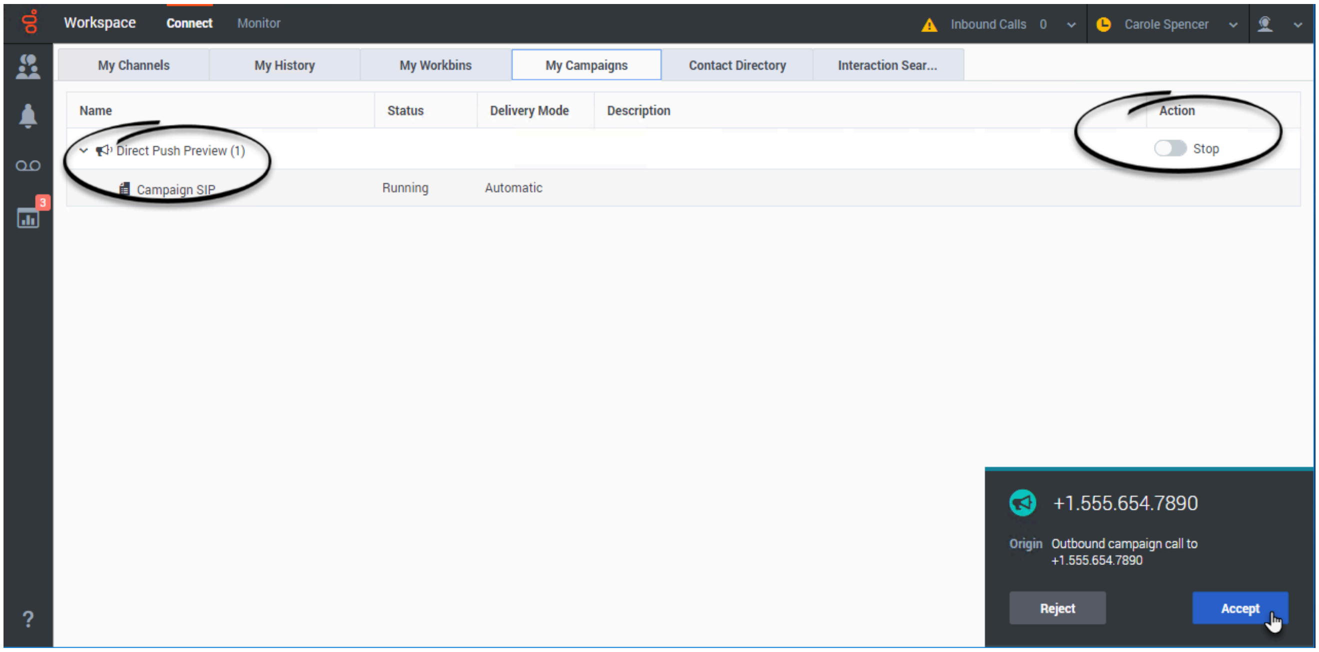
In some environments, the Push-Preview campaign has a time limit during which you can preview the interaction before it is dialed automatically. In this case, a timer is displayed next to the **Party Action** menu that counts down the time until the call is automatically connected if you do not click **Call** ( ). Some Push-Preview campaigns connect the call automatically.



You might be required to manually dial a call due to local regulations. In this case, click the contact's phone number at the top of the interaction and either select the phone number, or, if you are required to do so, select **Dial New Phone Number**. When the **Dial New Phone Number** window is displayed, type the phone number into the **Enter Phone Number** field, select the phone number type from the drop-down menu, then click **Dial**.



How do I work with Direct Push-Preview campaigns?



In campaigns using Direct Push-Preview dialing mode, a record is delivered to your desktop automatically from the system. You can preview the case information and other details in the pop-up call record notification *before* you start the call. After previewing it, you click **Accept** to dial the contact.

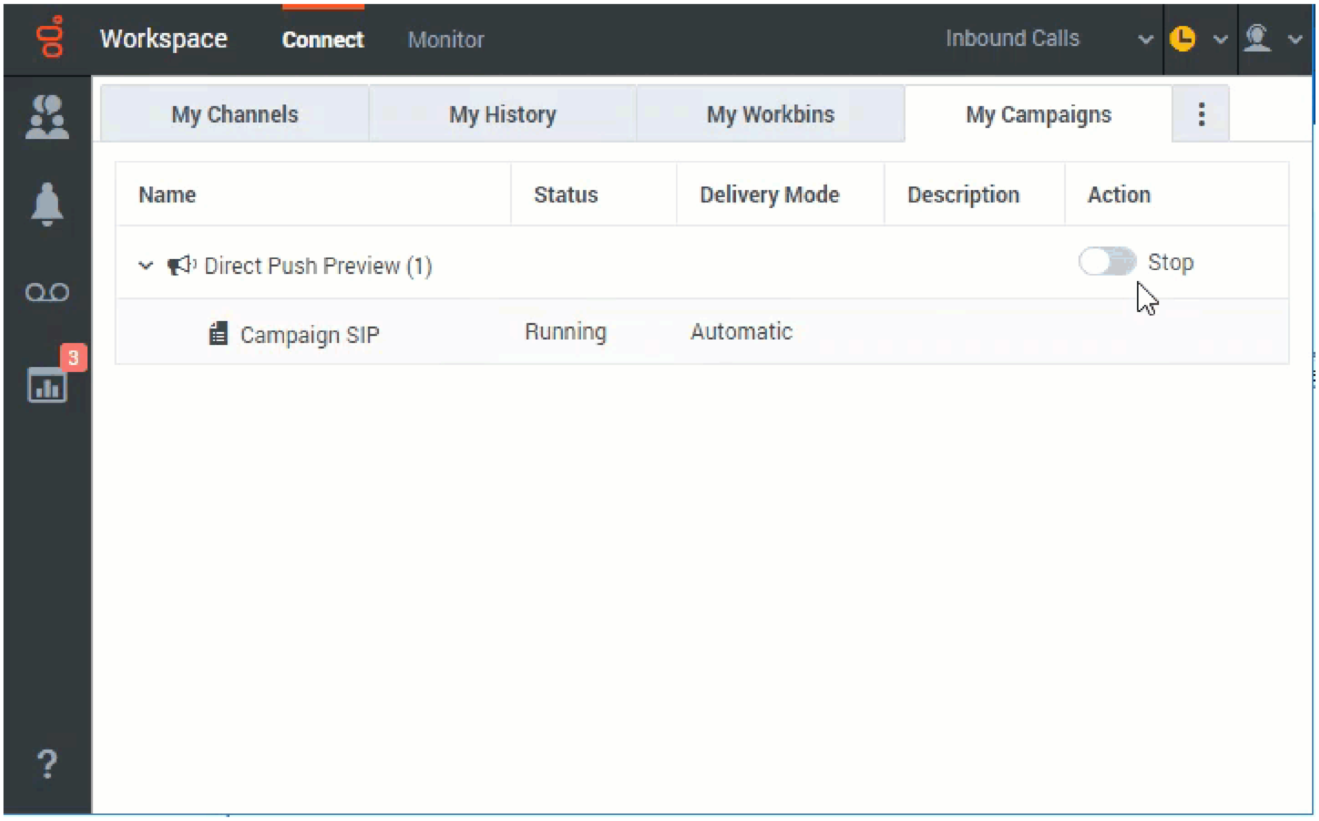
As with other Outbound campaign types, pop up notifications inform you when a campaign assigned to you is loaded into the system and when it starts and stops.

To determine which campaigns are assigned to you, check the **My Campaigns** tab. Because Direct Push Preview campaigns ignore your Ready/Not Ready status, to tell the system when you are ready to receive records and when you want to stop receiving records, you must use the **Get Record** (Get Record)/**Stop** (Stop) toggle in the **My Campaigns** tab in the **Action** column in the Direct Preview Campaign row.

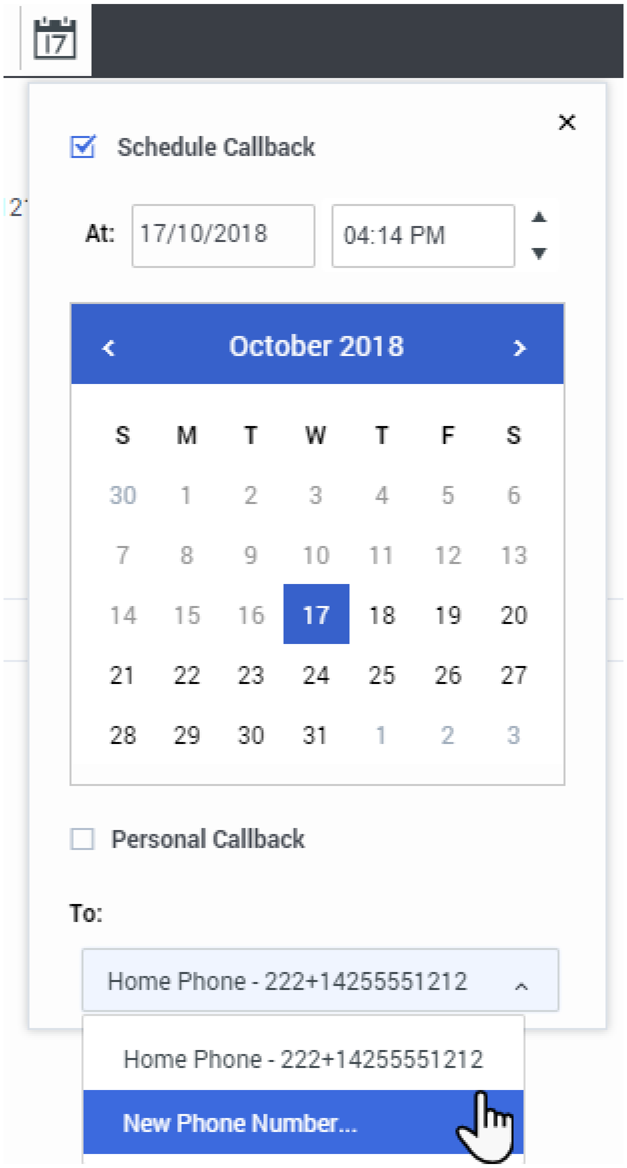
After handling an Outbound campaign call, click **End** to end the call and **Done** to mark it Done. You automatically receive new calls until you do one of the following actions:

- Select **Stop** in the **My Campaigns** tab
- Select **Done and Stop** ( ) when you mark the interaction **Done**

To start receiving previews again, go to the **My Campaigns** tab, select the campaign you want to use, and select **Get Record**.



How do I schedule callbacks for a campaign?



During a campaign, you might not be able to reach the contact or they might request to be called back at another specific date and time. You can schedule a callback at any time while you are handling an Outbound campaign call, even after the call has ended.

The **Schedule Callback** button () opens the **Schedule Callback** window, where you can set a date, time, and even a different phone number for the callback. You can also specify whether the callback is personal (you will handle the callback) or whether any available agent will handle the callback.

Tip: During Preview campaigns, you might be able to use this feature to postpone a preview call before the call is dialed.

When you've set the values for the callback, the Schedule Callback button changes to the

Scheduled Callback button to indicate that a callback is scheduled. You can then end the call.

If you must change a scheduled callback, you can open the Schedule Callback window and change the settings.

To cancel a scheduled callback, clear the **Schedule Callback** box. You must do this *before* closing the Outbound Record or the Interaction Preview.

When a rescheduled callback is directed to your workstation, an interaction preview is displayed as usual, but the Case Information includes an indication in the **Origin** field that the call is a **Callback** or a **Personal Callback**.

Note: A message might be displayed in the Agent Workspace interface when you try to mark Done a rescheduled Outbound interaction. This can happen if the specified rescheduled date and time are invalid (for example, you might have set the rescheduled date and time in the past). You must fix any errors or cancel the rescheduled call first before you can mark the interaction as Done.

What happens if the contact is on a Do-Not-Call list?

Some records in your campaign might have phone numbers that are listed in the Do-Not-Call registry. If you call one of these numbers, it could mean penalties for your business. Your administrator might have set up a pre-dial validation service to check the numbers before you make a call.

If so, Agent Workspace displays messages to alert you when a number is on the Do-Not-Call list or the number can't be validated:

- `The phone number is on the Do-Not-Call list`
  The pre-dial validation service has determined that the number is on the Do-Not-Call registry and there is no other number available for the contact. Mark the record **Done** to get the next record.

- `The phone number is on the Do-Not-Call list. The next available phone number will be selected.`
  The pre-dial validation service has determined that the number is on the Do-Not-Call registry and there is another number available for the contact. The next number is used.

- `The phone number cannot be validated (Do-Not-Call list service is unavailable).`
  The pre-dial validation service is unavailable. Mark the record as **Done** to get the next record.

- `The phone number cannot be validated (Do-Not-Call list service is unavailable). The next available phone number will be selected.`
  The pre-dial validation service is unavailable and there is another number available for the contact. The next number is used.

Go back to How do I work with Preview campaigns.

What next?

- Change your status to Ready

- More about voice calls
- Internal interactions

Top 5 topics

1. Getting Started
2. Navigating Agent Workspace
3. Calls
4. Contacts
5. Contact and interaction history