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Outbound (CX Contact) CX Contact Help

Create and Manage Caller ID Sets

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Contents

- [1 Caller ID Sets Table View](#)
- [2 Import Caller IDs from a File](#)
- [3 Create / Edit a Caller ID Set](#)
- [4 Assign a Caller ID Set](#)
- [5 Related Topics](#)



- Administrator

Learn how to build and modify what appears on the called phones per-campaign or per-call.

Related documentation:

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To increase your market penetration rate and spread awareness of your brand or product, add a Caller ID Set to your Outbound Campaign. With a Caller ID Set you can control what appears on the called phones per-campaign or per-call.

When an Outbound Campaign Group includes a Caller ID Set, the Outbound Contact Server (OCS) selects (sequentially or randomly) a different Caller ID each time a specific outbound phone number is contacted. As a result, the same outbound phone number will see a different Caller ID every time he/she receives a call from the same Outbound Campaign.

Each Caller ID value represents a phone number (a string of digits with an optional + sign).

Caller ID Sets Table View

To view the Caller ID Sets table view click Campaigns > Caller ID Sets. The following image represents a typical Caller ID Sets view.

The screenshot shows the Genesys interface with the 'Caller ID Sets' table view. The table has columns for Name, Description, Size, Last Modified Date, Created Date, and Actions. There are 9 rows of data, each representing a Caller ID Set. The table is paginated, showing 1-25 of 296 items per page.

<input type="checkbox"/>	Name	Description	Size	Last Modified Date	Created Date	Actions
<input type="checkbox"/>	Caller ID Set-A		55	09/16/2019 11:31 AM	09/16/2019 11:31 AM	/ + - x
<input type="checkbox"/>	Caller ID Set-B		55	09/16/2019 11:09 AM	09/16/2019 11:09 AM	/ + - x
<input type="checkbox"/>	Caller ID Set-C	HSBC Large File Test	55	09/16/2019 10:28 AM	09/16/2019 10:28 AM	/ + - x
<input type="checkbox"/>	Caller ID Set-D		55	09/16/2019 08:38 AM	09/16/2019 08:38 AM	/ + - x
<input type="checkbox"/>	Caller ID Set-E		2	09/16/2019 08:30 AM	09/16/2019 08:30 AM	/ + - x
<input type="checkbox"/>	Caller ID Set-F	Emulated List on GDemo	2	09/16/2019 08:30 AM	09/16/2019 08:30 AM	/ + - x
<input type="checkbox"/>	Caller ID Set-G	Field for ChristyM	2	09/16/2019 08:30 AM	09/16/2019 08:30 AM	/ + - x
<input type="checkbox"/>	Caller ID Set-H		1	09/16/2019 08:29 AM	09/16/2019 08:29 AM	/ + - x
<input type="checkbox"/>	Caller ID Set-I	Genesys University Training	3	09/16/2019 08:29 AM	09/16/2019 08:29 AM	/ + - x

The following table describes the Caller ID Sets options.

Type of Information	Description
New	Enables you to create a new Caller ID Set.
Import	Enables you to import a Caller ID Set. See Import Caller ID Set.
Delete	Enables you to delete the selected Caller ID Set(s).
Search	Enables you to search for a specific Caller ID Set.
Name	The Caller ID Set name.
Description	An arbitrary representation of the Caller ID Set.
Size	The number of Caller IDs in the specific Caller ID Set.
Actions	<ul style="list-style-type: none"> • Edit • Download (disabled) • Delete

Import Caller IDs from a File

1. Click **Campaigns > Caller ID Sets** and click **Import**.

The screenshot shows a dialog box titled "Import Caller IDs from File". It features the following elements:

- A red asterisk next to the label "Name", indicating a required field.
- A text input field containing the placeholder text "Name".
- A text input field containing the placeholder text "Description".
- A button labeled "Select File (.txt, .csv)".
- A "Cancel" button at the bottom left.
- An "Import" button at the bottom right.

2. In the fields provided enter a Caller ID Set name and description.

3. Click **Select File (*.txt, .csv) and browse to the location of the file.**
4. After you select the *.txt or *CSV file click **OK** and then **Import**. The imported Caller ID(s) are now a part of a specific Caller ID set that will automatically appear in the Caller ID Sets view with the name given in the second step.

Create / Edit a Caller ID Set

1. Click **Campaigns > Caller ID Sets**.
2. From the list provided click the name of the Caller ID Set you want to edit or click **+New** to create a new Caller ID Set.

The screenshot shows the 'Edit Alpha Caller ID Set' page in the Genesys interface. The page title is 'Edit Alpha Caller ID Set'. Below the title, there is a description: 'Set of phone numbers to be used as Caller ID, sequentially or in random order.' The form contains two main fields: 'Name' (containing 'Alpha Caller ID Set') and 'Description' (containing 'Description for Alpha Caller ID Set - illustrative purposes'). An 'Update' button is located to the right of the description field. Below the form is a table with 10 rows of Caller ID data. The table has columns for '#', 'Caller ID', 'Created Date', and 'Actions'. The 'Created Date' column shows dates from 09/16/2019 11:31 AM to 09/16/2019 08:29 AM. The 'Actions' column contains edit and delete icons for each row. At the bottom of the table, there is a pagination control showing '1 - 20 of 20' and '25 per page'.

#	Caller ID	Created Date	Actions
1	16504661100	09/16/2019 11:31 AM	[Edit] [Delete]
2	16504661101	09/16/2019 11:09 AM	[Edit] [Delete]
3	16504661102	09/16/2019 10:28 AM	[Edit] [Delete]
4	16504661103	09/16/2019 08:38 AM	[Edit] [Delete]
5	16504661104	09/16/2019 08:30 AM	[Edit] [Delete]
6	16504661105	09/16/2019 08:30 AM	[Edit] [Delete]
7	16504661106	09/16/2019 08:30 AM	[Edit] [Delete]
8	16504661107	09/16/2019 08:29 AM	[Edit] [Delete]
9	16504661108	09/16/2019 08:29 AM	[Edit] [Delete]
10	16504661109	09/16/2019 08:29 AM	[Edit] [Delete]

3. In the fields provided enter a Caller ID Set name and description.
4. From the list provided select one or more Caller IDs.
5. Click **Update**. The new / edited Caller ID Set automatically appears in the Caller ID Sets view.

The following table describes the options available when creating/editing a Caller ID Set.

Type of Information	Description
New	<p>Enables you to create a new Caller ID. When you click +New enter a Caller ID in the field provided and click Save. The new Caller ID is added to the Caller ID Set you are creating / editing.</p> <p>Note: A Caller ID can only include numbers and an optional plus</p>

Type of Information	Description
	character + at the beginning of the number.
#	A sequential order value based on the Caller ID creation date/time.
Caller ID	Indicates the Caller ID value. This column is sorted by the Created Date column.
Created Date	Indicates the date and time at which the Caller ID was added to the Caller ID Set.

Assign a Caller ID Set

To assign a Caller ID Set to a Create a Dialing Profile, Create a Campaign Template and/or Create a Campaign Group:

1. Create / Edit a Dialing Profile, Campaign Template and/or Campaign Group.
2. In the **General** tab turn on the **Caller ID Set** switch option.
3. Click **Change** and in the dialog window that appears select the Caller ID Set order.
4. Select one of the Caller ID Sets from the list provided.
5. Click **Save**. The selected Caller ID Set(s) appear next to the Change button.

Related Topics

- Campaign Structure and Terminology
- Create and Manage a Campaign Template
- Create and Manage a Campaign Group
- Create and Manage Contacts and Contact Lists