Outbound (CX Contact) CX Contact Help

Create a Campaign Template

5/6/2026

Contents

- 
- Administrator

Learn how to create and manage a campaign template. For general information about campaign templates and how they fit into the overall campaign structure, refer to the Campaign Structure and Terminology page.

Related documentation:

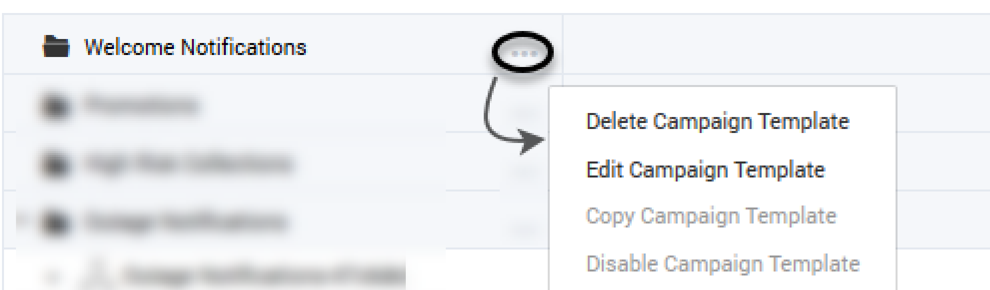
Edit or Delete a Campaign Template

To edit a campaign template, go to the campaigns dashboard and do one of the following:

- Click the name of the campaign template to open and edit its properties OR
- Click the **More Actions** menu (displays as an Ellipsis) displayed next to the campaign template and select **Edit Campaign Template**.

To delete a campaign template, go to the campaigns dashboard, click the **More Actions** menu (displays as an Ellipsis) displayed next to the campaign template and select the **Delete** option.

> **Important**
> You can only delete a campaign template if it does not have a campaign group.



Related Topics

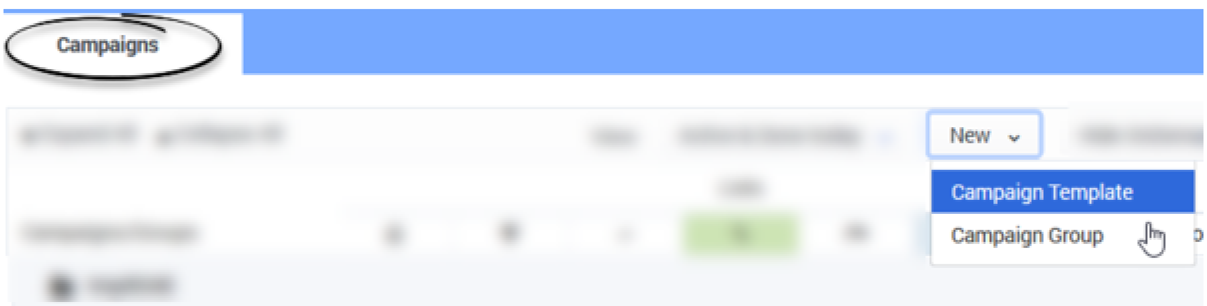
- Campaign Structure and Terminology
- Create a Dialing Profile
- Create a Campaign Group
- Compliance Tools

Create a Campaign Template

Important

Before you can create a campaign template, you must create a session profile and a dialing profile.

On the Campaigns page, click **New -> Campaign Template**.



The options you set on the dialing profile page automatically populate on each of the five tabs presented below. You can change any or all of these options for this particular campaign template. Any campaign group you create from this campaign template will inherit these settings.

}}

Refer to the following sections to learn about all available options and to define key campaign parameters.

Refer to each of the sections below to define key campaign parameters and to learn about all available options.

- General tab - specify general information about the campaign template.
- Dialing tab - select a dialing mode or IVR mode, pacing options, optimization parameters, and campaign time constraints.
- Treatment tab - specify call delivery options and retry options, create a device escalation plan, or define the URI for an SCXML treatment script.
- Compliance tab - specify compliance parameters. **Note:** This tab appears only if you're creating a Voice dialing profile.

- Content tab - create SMS alert templates and custom scripts. **Note:** This tab appears only if you're creating an SMS profile.
- Advanced tab - enable advanced pacing and dialing features.

General

This tab has four sections, outlined in the table below.

Section	Description

General Options	To start, specify the following basic details about the dialing profile:
	• Name of the campaign template.
	• Channel - The type of channel being used for the campaign (Voice, SMS, or Email) automatically populates here.
	• Agent Group (Voice channel only) - Agent groups are set up in either Genesys Administrator EXtension (GAX) or in Agent Setup.
	• Destination DN (Voice channel only) - The Voice Transfer Destination DN associated with the Campaign Template of Campaign Group. Destination DN identifies DN where the outbound calls are to be delivered for distribution to agents or IVR ports. The list of DNs available for selection is taken from the Agent Group Origination DNs list. The following DNs can be selected when configuring Destination DN (Voice transfer destination DN) for the Campaign Group or Campaign Template:
	    ◦ The Destination DN specified in the Session Profile used to create the Campaign Template.
	    ◦ All DNs (if present) specified as Origination DNs in the properties associated with the Agent Group used to create Dialing Profile, Campaign Template or Campaign Group.
	• Caller ID Number (Voice channel only) - The Caller ID Number associated with the campaign. Note: You can set the global Caller ID number on the Settings page.
	• To use more than one Caller ID turn on the Caller ID Set switch option and click Change. For details see: Create and Manage Caller ID Sets > Assign a Caller ID Set.

Section	Description
Phone Number Filters	Next, you'll apply phone number filters to the contact lists that be will be part of this campaign. Note that the phone number filters available to you depend on the channel being used for this campaign. Refer to the Apply Phone Number Filters page for a description of the available phone number filters.
Rules and Strategies	In this next section, you'll see a list of attempt rules, location rules, and suppression lists that were marked as **Required** when they were created or imported. You can click **Change** to add additional rules or suppression lists, but you cannot remove them from this page. You must return to the Compliance Tools page or the Contact Suppression Lists page to uncheck the **Required** box for the rule or list you want to remove. Refer to the Attempt Rules, Location Rules, or Contact Suppression Lists pages for more information. You can also apply the following in this section: • Labels - Choose from a contact list labeling schema you created on the **Labels** page. **Note**: A contact list can have only one labeling schema. • Filtering Rule - Choose a filtering rule that, when applied, defines the way contact data is sorted and ordered. Unlike upload and selection rules, you can update apply or update a filtering rule dynamically, while a campaign group is running.
List Reset Options	Finally, if you want to restart a campaign after it has been paused or stopped/unloaded, you can specify the way in which CX Contact should retry the contact list. The options are outlined below.

Dialing

Use the **Dialing** tab to set important dialing parameters, such as the dialing mode, pacing options, and time constraints. This table below describes each section of the **Dialing** tab.

Section	Description
Dialing Modes and IVR Modes	Choose a dialing mode or an IVR mode, depending on the type of campaign you're running. For a detailed description of each dialing mode and IVR mode, refer to the Dialing Modes and IVR Modes page.
Optimization Parameters	If you select a Predictive dialing mode or Predictive IVR mode, you can select an optimization parameter. When you select an optimization parameter, the system adjusts call pacing to

Section	Description
	adhere to that parameter. Refer to the Pacing and Optimization page for a description of each optimization parameter and its associated dialing mode or IVR mode.
Pacing Options	Pacing defines the way in which contact attempts are made - you select the parameters and the dialing algorithm adjusts accordingly. Refer to the Pacing and Optimization page for a description of each pacing option and its associated dialing mode or IVR mode.
Time Constraints	Use the Time Constraints section (first enable **Constrain Pass Times**) to define when the system can and cannot attempt a record. Refer to the Define the Calling Window for information about time constraint options and to learn how to set a safe dialing window.

Treatment

Start of Treatment Tab.

A treatment defines what CX Contact should do with a call that does not reach the intended party.

This tab is broken down into the following sub-tabs:

- Delivery Options - define the circumstances in which the system should connect a call to an agent.
- Retry Options - define the way the system should respond to any given call result.
- SCXML-based treatments - specify the URI to an SCXML treatment script.
- Device Escalation - in the event a single record contains more than one device, you can identify which device(s) are contacted as well as the order in which they are contacted.

Click the links above to learn how to apply treatments and device escalation.

End of Treatment Tab.

Compliance

Start of Compliance Tab.

If you have a campaign using Predictive dialing and the Abandoned Call Rate optimization parameter, and you want the system to switch to Progressive dialing in the event the target abandon rate reaches your optimization goal (for example 3.1%) to eliminate the risk of further abandonment, you'll specify those values here. The system can then switch back to Predictive once the call abandon rate returns to an acceptable level (for example 2.9%).

End of Compliance Tab.

Content

Start of Content Tab.

> **Important**
> This tab only appears for campaigns using an SMS or Email channel.

Use this tab to create SMS or Email templates, depending on the channel. See the Create an SMS Template page or the Create an Email Template page for more information.

End of Content Tab.

Advanced

Start of Advanced Tab.

> **Important**
> Use these options only if you have advanced knowledge of CX Contact or have been advised by Customer Care.

On the **Advanced** tab, you can configure an unlimited number of arbitrary dialing options that provide additional functionality. Enter the option name and value that you want to apply to the campaign group here. Contact your account representative for more information about the available options.

The pacing and dialing options available on this page are described in detail in the Pacing Options and Advanced Dialing Options sections on the Pacing and Optimization page in this manual.

End of Advanced Tab.

Tip

All options selected on the **Dialing Profiles** page become the default settings for all campaign group templates that use that dialing profile. When you create a new campaign group, however, you can change the settings for that one specific campaign group.