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## Outbound (CX Contact) CX Contact Help

[Manage Consent Lists](#)

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## Contents

- 1 View a Consent List
- 2 Create Consent Lists
  - 2.1 Edit Consent Lists
  - 2.2 Delete Consent Lists
- 3 Add Records to Consent Lists
- 4 Associate Contact Lists with Campaign Groups
- 5 Search Consent Lists
- 6 Secure Consent Lists



- Administrator

Learn how to view, create, and manage Consent lists.

### Related documentation:

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Consent lists contain contact information about customers who have consented to receive outbound calls, emails, or SMS messages. The key features of Consent Lists are as follows:

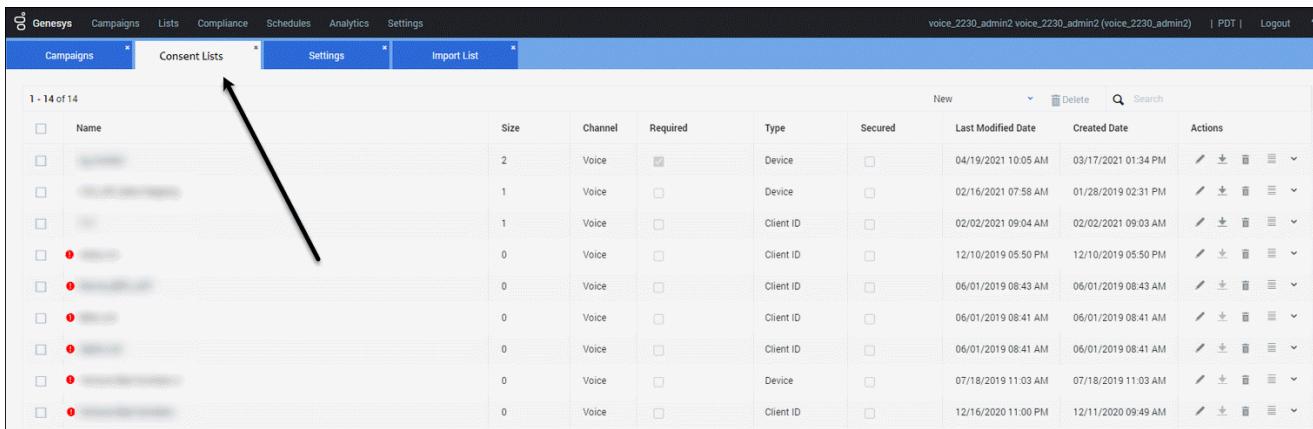
- Consent contacts by device—Specify one or many devices for a contact.
- Consent contacts by Client ID—Specify a Client ID for a contact.
- Use a single consent list for multiple Campaign Groups.

Use the **Compliance > Consent Lists** page to perform any of the following tasks:

- View Consent Lists
- Create Consent Lists
- Edit Consent Lists
- Delete consent lists
- Import Consent Lists
- Add consent records to Consent Lists

## View a Consent List

In the CX Contact main menu, select **Compliance > Consent Lists** to view the available Consent Lists and their associated details in a table view.



Name	Size	Channel	Required	Type	Secured	Last Modified Date	Created Date	Actions
...	2	Voice	<input checked="" type="checkbox"/>	Device	<input type="checkbox"/>	04/19/2021 10:05 AM	03/17/2021 01:34 PM	   
...	1	Voice	<input type="checkbox"/>	Device	<input type="checkbox"/>	02/16/2021 07:58 AM	01/28/2019 02:31 PM	   
...	1	Voice	<input type="checkbox"/>	Client ID	<input type="checkbox"/>	02/02/2021 09:04 AM	02/02/2021 09:03 AM	   
...	0	Voice	<input type="checkbox"/>	Client ID	<input type="checkbox"/>	12/10/2019 05:50 PM	12/10/2019 05:50 PM	   
...	0	Voice	<input type="checkbox"/>	Client ID	<input type="checkbox"/>	06/01/2019 08:43 AM	06/01/2019 08:43 AM	   
...	0	Voice	<input type="checkbox"/>	Client ID	<input type="checkbox"/>	06/01/2019 08:41 AM	06/01/2019 08:41 AM	   
...	0	Voice	<input type="checkbox"/>	Client ID	<input type="checkbox"/>	06/01/2019 08:41 AM	06/01/2019 08:41 AM	   
...	0	Voice	<input type="checkbox"/>	Device	<input type="checkbox"/>	07/18/2019 11:03 AM	07/18/2019 11:03 AM	   
...	0	Voice	<input type="checkbox"/>	Client ID	<input type="checkbox"/>	12/16/2020 11:00 PM	12/11/2020 09:49 AM	   

This view contains the following Consent Lists details:

Consent list details								
<b>Name</b>	The name of the consent list.							
<b>Size</b>	The number of entries in the consent list.							
<b>Channel</b>	Indicates the channel (voice, SMS, or Email) that the consent list applies to.							
<b>Required</b>	Indicates if the consent list is mandatory or optional.							
<b>Type</b>	Indicates whether the consent occurs by <b>Device</b> or by <b>Client ID</b> .							
<b>Secured</b>	Indicates whether or not the consent list was PGP encrypted before it was imported/exported.							
<b>Last Modified Date</b>	Indicates the date that the consent list was last modified.							
<b>Created Date</b>	Indicates the date that the consent list was created.							
<b>Actions</b>	Contains a number of <b>Action</b> buttons, as follows:							
	     <ul style="list-style-type: none"> <li><b>Edit Consent List</b>—Click to edit a consent list</li> <li><b>Download List</b>—Click to download a consent list</li> <li><b>Delete List</b>—Click to delete a consent list</li> <li><b>Import Activity</b>—Click to view import history for a consent list</li> <li><b>More Actions</b>—Click to open a list of more actions, as follows:</li> </ul>							

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### Consent list details

- Append File
- + Add Record(s)
- Clear List

## Create Consent Lists

You create Consent Lists by importing the data contained within CSV files.

The screenshot shows the Genesys interface with the 'Campaigns' tab selected. A sub-dialog titled 'Import List' is open. The dialog contains the following fields:

- Name:** Consent list name (text input field)
- Secure with encryption:**  (checkbox)
- Select File:** (button to browse for a CSV file)
- Channel:**  Voice,  SMS,  Email
- Type:** Choose Type (dropdown menu)
- Select upload rule:** No upload rule (dropdown menu)
- Select specification file:** No specification file (dropdown menu)
- Required:**  (checkbox)

At the bottom are 'Cancel' and 'Create empty' buttons.

To create a new Consent List:

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1. In the **Consent Lists** page, select **New > New List**.  
**The Import List dialog opens.**
2. Enter a name for the consent list.
3. If you want to encrypt the data, check the **Secure with encryption** check box.
4. Click **Select file** to select the CSV file you want to import.
5. Select the **Channel** and **Type**.
6. Optionally, select an upload rule.
7. Optionally, select a specification file.
8. If this file is required, check the **Required** check box.
9. Click **Create empty**.

## Edit Consent Lists

To edit an existing consent list:

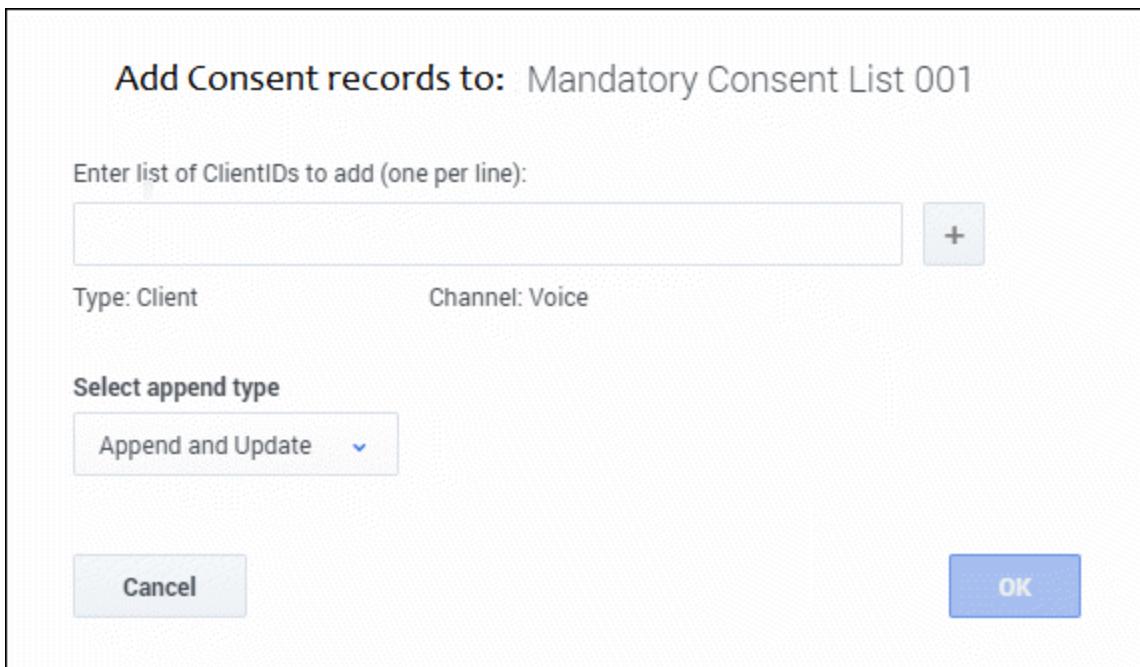
1. On the **Consent Lists** page, select the consent list.
2. Click the pencil icon from the **Actions** menu.  
**You can edit any of these fields, excluding Name and Type.**  
**See the consent list details here.**

## Delete Consent Lists

To delete an existing consent list and the contacts within it:

1. Go to the **Actions** menu for the list.
2. Click the trash can icon.
3. Select **Delete List**.

## Add Records to Consent Lists



To add contacts to a consent list:

1. On the **Consent Lists** page, go to the **Actions** menu for that list and select **Add Records**.
2. Enter one or more devices or Client IDs, depending on the list type.
3. Select the **Append type**.
4. Click **OK**.

There are three Append types from which to choose:

- **Append and update** - The imported records are added to the consent list. If CX Contact finds a duplicate record it overrides the existing record with the new record
- **Append only** - The imported records are added to an existing consent list. Duplicate records are always ignored.
- **Flush and append** - Before the new records are imported into the consent list, the existing contact list is completely flushed.

## Associate Contact Lists with Campaign Groups

You can optionally associate Consent Lists with Campaign Groups for any channel (Voice, Email, SMS).

**\* Contact Lists:**  [edit]

**\* Agent Group:**  [down]

**\* Destination DN:**  [down]

**Caller ID Number:**  [edit]

**Caller ID Set** off

**Phone Number Filters:**

<input type="checkbox"/> Mobile	<input type="checkbox"/> International	<input type="checkbox"/> Duplicated device in Contact
<input type="checkbox"/> Duplicated device in Position	<input type="checkbox"/> Ends with '00'	<input type="checkbox"/> Contains an extension
<input type="checkbox"/> Duplicated device in List	<input type="checkbox"/> On a 'Do Not Contact' list (US/UK only)	<input type="checkbox"/> Ends with '000'
<input type="checkbox"/> Landline	<input type="checkbox"/> Non-Geographic	<input type="checkbox"/> Voip phone

**Attempt Rules:** Change

**Location Rules:** Change

**Custom Rules:** Change

**Contact Times:** Change US-AZ US-AL

**Contact Suppression Lists:** Change Optional Consent List 002 Mandatory Consent List 001

**Consent Lists:** Change Optional Consent List 002 Mandatory Consent List 001

**Dialing Filter:** Filter1

**Lists Reset:**  Continue  Selected Reset  Full Reset

1. Go to the **Dialing Profile > Campaign Template > Campaign Group** view.
2. Click **Create/Edit** to open the dialog.  
**You'll see Consent Lists, together with a Change button and the associated lists to the right.**
3. Click **Change** to open a dialog containing a list of the available consent lists.
4. Click **X** (to the right of the list) to disassociate it from the Campaign Group.

## Search Consent Lists

To search Consent Lists, go to the **Suppression and Consent Search** page, and then click **Search in Consent Lists**. You can search by device (phone number) or Client ID.

Click **View Entries** to display the search results in a table with the following columns:

- **Consent Entry**

- **Consent Last Name**
- **List Type** (Device or Client ID)
- **Channel** (Voice, Email, SMS)
- **Consent Status** (Active, Inactive)
- **Last Modified Date**
- **Created Date**

## Secure Consent Lists

You can secure Consent Lists by adding encryption. See the **Settings** > Security tab. Encryption is disabled (**OFF**), by default.

