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Outbound (CX Contact) CX Contact Help

[Create a Dialing Profile](#)

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- Administrator

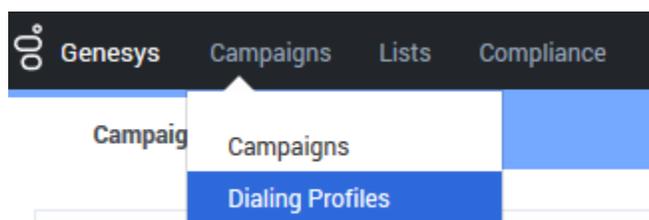
Learn how to set up a dialing profile. For general information about dialing profiles and how they fit into the overall campaign structure, refer to the Campaign Structure and Terminology page.

Related documentation:

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Dialing Profile Details

Before you create the new dialing profile, let's take a look at the main **Dialing Profiles** page. To get there, go to the **Campaigns** menu and select **Dialing Profiles**.



On the main **Dialing Profiles** page, you'll see a table that lists core details about each dialing profile:

- **Name** - Includes the name of the dialing profile and an icon that represents the type of dialing profile being used.
- **Type** - Specifies if the dialing profile is an agent-based dialing profile or an IVR-based dialing profile. The type also specifies if the dialing profile is a LIFO dialing profile. See the table below for more information.
- **Channel** - Specifies if the dialing profile is applied to a Voice, SMS, or Email channel.
- **Last Modified Date** - The date the dialing profile was last modified.
- **Created Date** - The date the dialing profile was created.

The following table gives a description of each icon and the type of dialing profile it represents.

Icon	Description	Type
	Represents a profile using any automatic or manual dialing mode.	Agent

Icon	Description	Type
	Represents a profile using either Progressive IVR or Power IVR mode.	IVR
	Represents a profile using Predictive IVR mode.	Agent
	Represents a dialing profile using an SMS channel.	Alert
	Represents a dialing profile using an Email channel.	General

To visually inform you that LIFO has been enabled within an existing dialing mode the dialing icons will appear as shown in the following table.

Icon	LIFO Mode	Type of Dialing Profile
	Predictive, Progressive (with or without Seizing) or Push or Pull Preview with LIFO.	Agent / LIFO
	Power IVR with LIFO.	IVR / LIFO
	Predictive IVR or Progressive IVR with LIFO	Agent / LIFO

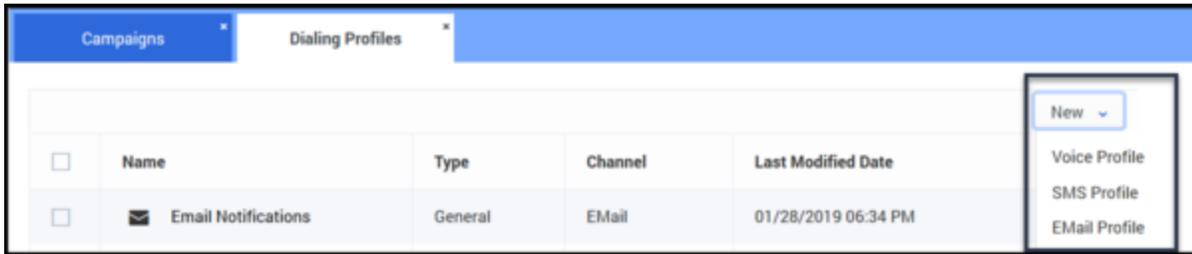
For more information about dialing modes and IVR modes, refer to the [Dialing Modes and IVR Modes](#) page.

The remainder of this article describes the following procedures:

- Create a dialing profile
- Edit a dialing profile
- Duplicate a dialing profile
- Delete a dialing profile

Create a Dialing Profile

To create a new dialing profile, on the Dialing Profile page, click **New** and select the type of dialing profile you want to create (Voice, SMS, or Email).



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	<p>To start, specify the following basic details about the dialing profile:</p> <ul style="list-style-type: none"> • Name of the dialing profile • 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 Group(s) created using this Dialing Profile. 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. • Caller ID Number (Voice channel only) - Specify the Caller ID number you want to use for the campaign group. You can set the global Caller

Section	Description
	ID number on the Settings page.
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	<p>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.</p> <p>You can also apply the following in this section:</p> <ul style="list-style-type: none"> • 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 rules 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

Section	Description
	IVR mode, you can select an optimization parameter. When you select an optimization parameter, the system adjusts call pacing to 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. When you define never start passes before and always end passes by options, a doughnut chart appears onscreen to display the duration of the allowable contact/broadcast window. 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%).

Edit Dialing Profile

General Dialing Treatment **Compliance** Advanced

When Abandon Rate reaches % switch to dialing mode

When Abandon Rate reaches % switch to dialing mode

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.

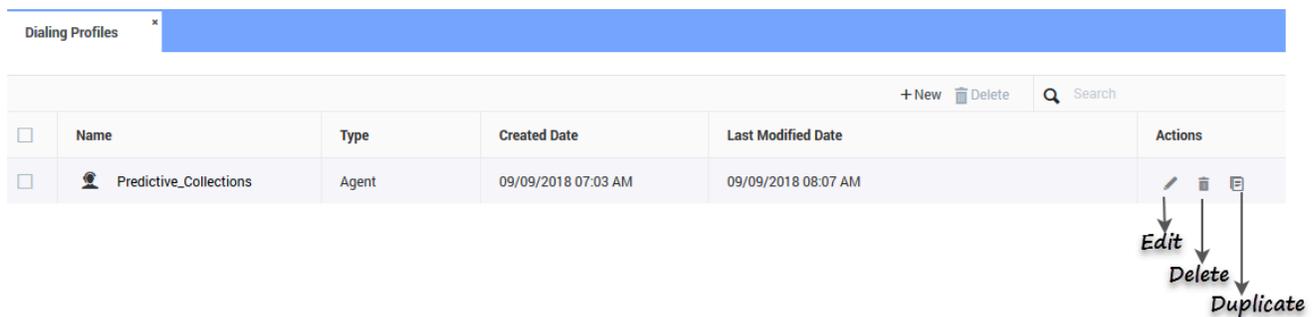
End of Advanced Tab.

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.

Manage a Dialing Profile

Once you have created a dialing profile, you can edit, delete, or duplicate the dialing profile from the main **Dialing Profiles** page. You can complete these tasks via the **Actions** menu on the main **Dialing Profiles** page.



The screenshot shows a web interface for managing dialing profiles. At the top, there is a blue header bar with the text 'Dialing Profiles' and a close button. Below the header is a table with columns: Name, Type, Created Date, Last Modified Date, and Actions. The table contains one row for 'Predictive_Collections' with Type 'Agent', Created Date '09/09/2018 07:03 AM', and Last Modified Date '09/09/2018 08:07 AM'. The Actions column for this row contains three icons: a pencil (Edit), a trash can (Delete), and a document with a plus sign (Duplicate). Arrows point from these icons to the labels 'Edit', 'Delete', and 'Duplicate' respectively.

	Name	Type	Created Date	Last Modified Date	Actions
<input type="checkbox"/>	 Predictive_Collections	Agent	09/09/2018 07:03 AM	09/09/2018 08:07 AM	   Edit Delete Duplicate

Edit a Dialing Profile

To edit a dialing profile, click the dialing profile you want to edit and click the pencil icon from the **Actions** menu. This opens the dialing profile. Click any tab to edit the corresponding properties.

Duplicate a Dialing Profile

If you want to create a new dialing profile that inherits all the properties from an existing dialing profile, you can simply duplicate the existing dialing profile. To do that, select the dialing profile you want to duplicate and click the document icon from the **Actions** menu. The new dialing profile appears in the list of dialing profiles, with the suffix **_duplicate1** appended to its name.

Delete a Dialing Profile

To delete a dialing profile, select the dialing profile you want to delete, and click the trash can icon from the **Actions** menu.

Timezone Source

When you create a new dialing profile, you can specify a time zone source from the Timezone Source menu, and CX Contact will assign the time zone to a record accordingly.

The Timezone Source options are described below.

Timezone Source	Description
Device (Default)	CX Contact uses the device's country code and area code to determine the time zone.
Contact	CX Contact uses the postal code value provided in the customer record.
Contact then Device	CX Contact uses the postal code value. If none is provided, it refers to the Device field.
Contact and Device	The system compares the device's area code and the contact's time zone provided in the record. If there is a time zone mismatch between the two pieces of information, the record will only be dialed during a 'safe' window - meaning the system doesn't start to attempt records until the latest time zone window opens and the system stops all attempts when the earliest time zone window closes. To define this calling window, you must set the Constrain Pass Time options for a campaign group to the hours that fall within this safe dialing window and you must use the local time zone option. Refer to the Define the Calling Window page for more information.
Explicit	<p>If you select Explicit from the Timezone Source menu, you can specify a time zone in the Choose Timezone menu in the Time Constraints section of the Dialing tab. When you do this, the system applies that time zone to all records in the contact list and ignores all Contact and Device time zone assignments.</p> <div style="border: 1px solid #ccc; padding: 5px;"><p>Important</p><p>We do not recommend this option if your contact list contains international numbers or countries with multiple time zones.</p></div>
Where to enable	<p>On the Dialing tab when you create or edit any of the following:</p> <ul style="list-style-type: none">• Dialing Profile• Campaign Template• Campaign Group

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](#)