CX Contact Help

Create a Campaign Group

5/8/2025

Contents

Create a Campaign Group

Important

The content of this document has been moved and is no longer being updated in this location.
For the latest content and most recent updates, see the CX Contact Help on the Genesys Multicloud site.

This article describes how to set up and manage a campaign group.

The following topics are covered in this article:

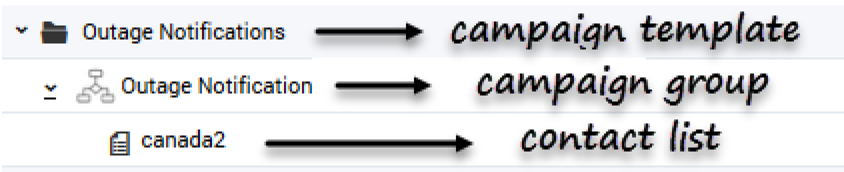
- Introduction
- Create a campaign group
- Edit a campaign group
- Delete a campaign group
- Start a campaign group in a Paused state
- Start, pause, or stop a campaign group - includes information about List Reset options
- Automatically complete a campaign group upon record depletion

Introduction

This section provides basic information about working with identifying campaign groups in the user interface. For general information about campaign groups and how they fit into the overall campaign structure, refer to the Campaign Structure and Terminology page.

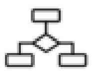
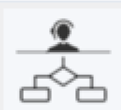
Identifying Campaign Groups on the Campaigns Page

Once a campaign group is created, it appears on the campaigns dashboard, regardless of whether it's running. You can click any campaign group at any time to view and edit its settings (refer to the Edit a Campaign Group to view editing restrictions while a campaign group is running).

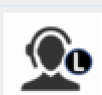
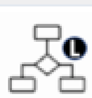
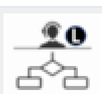


Campaign Group Icons

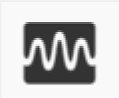
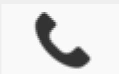
An icon next to the name of each campaign group identifies the type of dialing or IVR mode(s) being used. The table below describes the five types of icons.

Icon	Dialing Mode	Type of Dialing Profile
	Predictive, Progressive (with or without Seizing) or Push or Pull Preview	Agent
	Power IVR	IVR
	Predictive IVR or Progressive IVR	Agent
	Power IVR (for SMS alerts)	Alert
	Power IVR (for Email alerts)	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

To the right of a campaign group name, an icon identifies the dialing mode the campaign group uses. Hover over that icon to see the name of the dialing mode and a list of associated dialing parameters. The table below describes the dialing mode associated with each icon and the dialing parameters that display onscreen when you hover over the icon.

Icon	Dialing Mode	Dialing Parameters
	Progressive IVR, Predictive IVR, or Power IVR	Dialing mode, number of IVR ports, calls per minute
	Push or Pull Preview	Dialing mode only
	Predictive or Progressive (with or without Seizing)	Dialing mode, optimization parameter, optimization value, and number of ports
	Power IVR (for SMS alerts)	Dialing mode, optimization parameter, optimization value, and number of ports
	Power IVR (for Email alerts)	Dialing mode, optimization parameter, optimization value, and number of ports

For more information about Dialing Modes and IVR Modes, refer to the Dialing Modes and IVR Modes page.

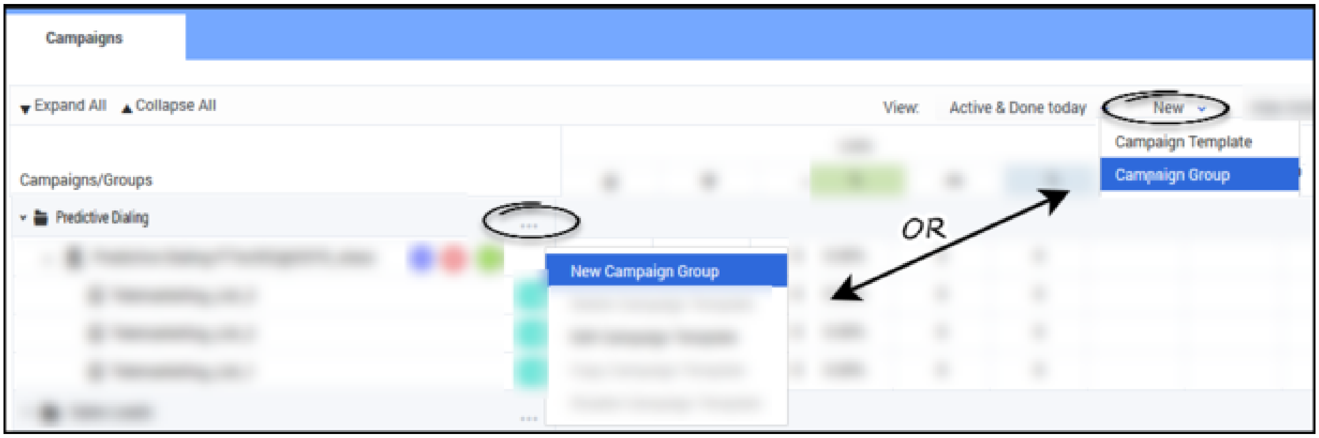
Create a Campaign Group

Important

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

You can create a campaign group in one of two ways on the Campaigns page.

- Option 1: From the **New** menu, select **Campaign Group**.
- Option 2: From the **More Actions** menu (displayed as an ellipsis) next to the name of the campaign template for the campaign group, select **New Campaign Group**. If you use this option, the campaign template and its associated parameters will automatically populate on the **New Campaign Group** page.



Then, on the **New Campaign Group** page, configure the options in each of the six tabs, as described in the tabs below.

General

Start of General Tab.
This page is broken up into sections, as described in the table below.

Section	Description
General Options	To begin, specify the following: • Campaign Template - select the campaign template for this campaign group. **Note:** if you created the campaign group using the Option 2 method outlined above, the campaign template and its associated parameters will automatically populate here. • Channel - The type of channel being used for the campaign (Voice, SMS, or Email) automatically populates here. • Contact Lists - The contacts that should receive the campaign. • Agent Group Important You cannot edit an Agent Group or Destination DN for a campaign group that is currently running. In that case, you need to stop the campaign group, edit the Agent Group and/or Destination DN, and then resume the campaign group. • One or more Contact Lists - Select at least one contact list for the campaign group.

Section	Description

	• Destination DN (Voice channel only)
	  ◦ 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.
	
	Note: The above DNs can be selected when configuring Destination DN (Voice transfer destination DN) for the Campaign Group or Campaign Template:
	
	• Caller ID Number (Voice channel only) - The Caller ID associated with the campaign. **Note:** You can set the global Caller ID number on the Settings page.
	• Caller ID Set - 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.

Phone Number Filters	Next, you'll apply phone number filters to the contact lists that be will be part of this campaign. Refer to the Apply Phone Number Filters to a Contact List 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, custom rules, contact times, 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. Refer to the Attempt Rules, Custom Rules, Location Rules, Contact Times, or Contact Suppression Lists pages for more information. You can also apply the following in this section: • Labels - Choose a 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. You can update apply or update a filtering rule when a campaign group is inactive/stopped.
List Reset	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.

End of General Tab.

Dialing

Start of Dialing Tab. 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 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 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.

End of Dialing Tab

List Options

Start of List Options Tab.

Important

The **List Options** tab is available at the campaign group level only. You will not see this tab when creating or editing a dialing profile or a campaign template.

If you have a campaign group with more than one contact list, you can use this tab to assign each list a relative weight, which represents the ratio of records that will be retrieved from a contact list for the campaign group.

To learn how to use this feature, refer to the Assign Weights to Contact Lists page in this manual.

The table below describes each section of the **List Options** tab

Section	Description
Enable List Options	Enables/disables the following options: • Never start before • Always end by • Timezone source • Timezone • Filtering Rule
Never start before	Indicates the earliest possible start time at which the system can dial records.
Always end by	Indicates the earliest possible end time at which the system can dial records.
Timezone source	Indicates from where the timezone is derived. For additional information see: Time Zone Assignment.
Timezone	Enables you to define an explicit timezone. The default is the local timezone. For additional information see: Time Zone Assignment.
Filtering Rule	Indicates the way data is sorted and ordered. For additional information see: Create a Filtering Rule.
Exclamation mark	Contains a tool tip that indicates that the Enable List Options option is turned on.

End of List Options Tab

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.

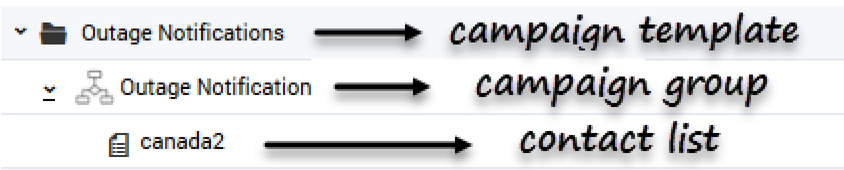
> **Important**
> Use these options only if you have advanced knowledge of CX Contact or have been advised by Customer Care.

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.

When you're finished, the campaign group and its contact lists will appear on the campaigns dashboard.



Edit a Campaign Group

To edit a campaign group, go to the campaigns dashboard and click the name of the campaign group to open and edit its properties.

Edit Settings for Active Campaign Groups

In most cases, you can edit a campaign group setting while the campaign group is running. In some cases, however, a setting cannot be changed, or it can be changed only if you first pause the campaign group, make the necessary changes, and then resume the campaign group.

The table below lists each campaign group setting and the condition under which each setting can be changed.

[+] Show table

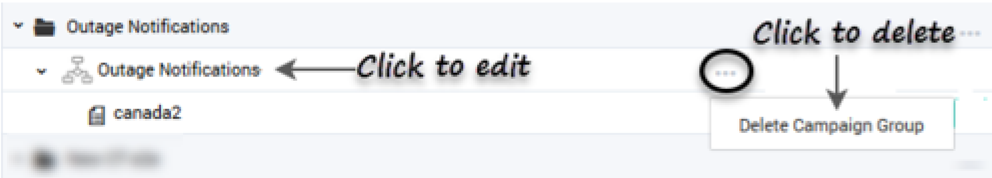
Tab	Setting	While Campaign Group is Running	While Campaign is Active	While Campaign is not Active/ Running	No Changes Allowed
General Tab	Campaign Template				●
	Channel	●	●	●	
	Contact List	●	●	●	
	Agent Group			●	
	Destination DN			●	
	Caller ID Number			●	
	Phone Number Filters		●	●	
	Attempt Rules, Location Rules, Custom Rules, Contact Times	●	●	●	
	Contact Suppression Lists	●	●	●	
	Filtering Rule			●	
	Lists Reset			●	
	Start Paused			●	
	Complete if no more records	●	●	●	

Tab	Setting	While Campaign Group is Running	While Campaign is Active	While Campaign is not Active/ Running	No Changes Allowed
Dialing Tab	IVR Modes - Switch between On and Off				●
	LIFO Modes - Switch between On and Off				●
	Dialing Mode - Change Predictive to Progressive		●	●	
	Change Predictive or Progressive to Push/Pull Preview		●	●	
	Change Predictive IVR to Progressive IVR or Power IVR		●	●	
	Change Predictive IVR or Progressive IVR to Push/Pull Preview Dialing		●	●	
	Change between Predictive with Seizing and Progressive with Seizing		●	●	
	Optimization Parameters and Goals	●	●	●	
	IVR Port Assignment	●	●	●	
	Small Group Mode	●	●	●	
	Constrain Start and End Time			●	
List Options Tab	Change List Weights	●	●	●	
Treatment Tab	All Delivery Options			●	

Tab	Setting	While Campaign Group is Running	While Campaign is Active	While Campaign is not Active/ Running	No Changes Allowed
	All Retry Options			●	
Compliance Tab	Abandon Rate - switch between Predictive and Progressive	●	●	●	
Advanced Tab	Advanced Options (add, edit, delete)	●	●	●	
	Answer Type Recognition	●	●	●	
	Timeguard Timeout	●	●	●	
	Minimum and Optimum Buffer	●	●	●	
	Average Inbound and Outbound Call Duration	●	●	●	
	Inbound Rate	●	●	●	
	Ignore very long calls	●	●	●	
	Reserve Agents for Inbound	●	●	●	

Delete a Campaign Group

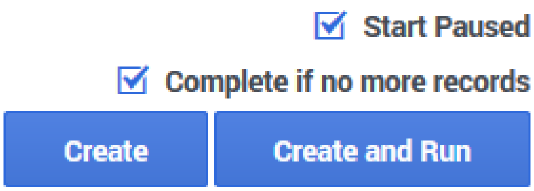
To delete a campaign group, go to the campaigns dashboard, click the **More Actions** menu (displays as an Ellipsis) displayed next to the campaign group and select **Delete Campaign Group**.



Start a Campaign Group in a Paused State

If, after creating the campaign group, you don't want to begin dialing immediately, you can put the campaign group in a paused state and then manually start the campaign group at a later time.

To do this, check **Start Paused** from the **New Campaign Group** page.



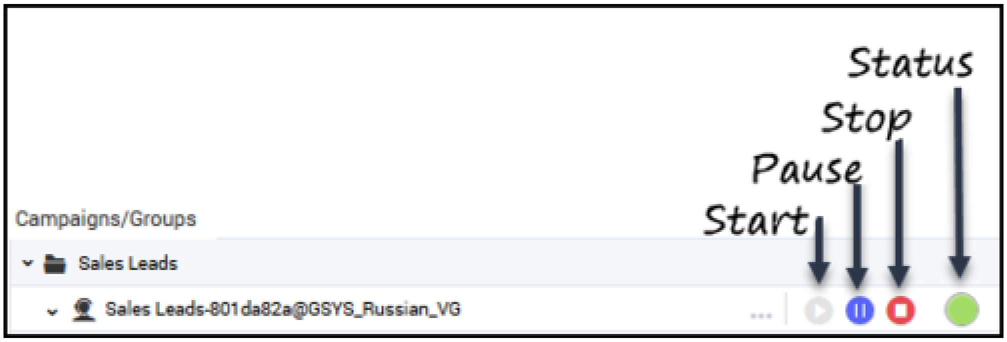
Start, Pause, or Stop a Campaign Group

On the campaigns dashboard, use the media controls next to each campaign group to start, pause, or stop dialing activity.

- Start - Starts or resumes dialing.
- Pause - Pauses dialing activity.
- Stop - Stops (unloads) dialing entirely. **Note**: Stopping a campaign group resets all campaign group statistics.

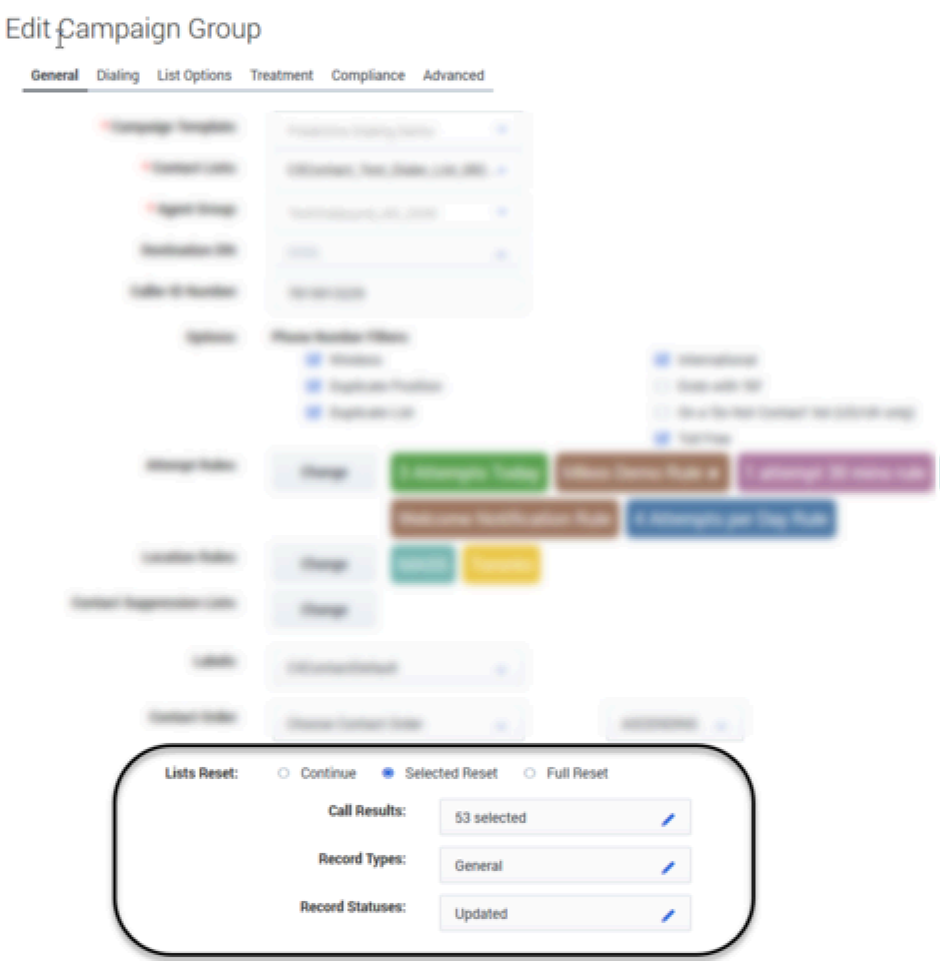
A status bulb next to the media controls indicates the current status of any campaign group and uses the following color schme:

- Green - Active/Running
- Blue - Paused
- Grey - Inactive



List Reset Options

In the event you pause and then restart a campaign, you can specify the way in which CX Contact should retry the contact list. You'll do this on the **General** tab for the campaign object.



The **List Reset** options are as follows:

- Continue (Default) - CX Contact resumes dialing against the contact list.

- Full Reset - CX Contact resets the contact list and starts dialing without any consideration for previous call results achieved.
- Selected Reset - CX Contact retries a contact list based on selected call results. A list reset occurs under any of the following conditions:
    - Call Result - Specify the call result(s) you want included in the retry.
    - Record Type - Select the record types you want included in the retry.
    - Record Status - Select the record status you want included in the retry, as follows:
        - Ready - The record is ready to be dialed. It has not yet been attempted.
        - Retrieved - The record is retrieved from the database and is currently being processed.
        - Updated (Default) - The record has been processed and updated in the database.

Automatically Complete a Campaign Group Upon Record Depletion

In the event all contact list records have been attempted and retry parameters depleted, CX Contact will automatically stop the campaign group and send a toast notification to all affected agents to advise that the campaign has been unloaded.

To enable this, check **Complete if no more records** on the New Campaign Group page.

When you're finished, select **Create** or **Create and Run**.

> **Important**
> This option is only available for campaign groups that are not currently running. If you want to apply this option to a campaign group that is currently running, you must first stop the campaign group, select this option, and then resume the campaign group.

Related Topics

- Create a Campaign Template
- Create a Dialing Profile
- Campaign Structure and Terminology