

# **GENESYS**

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## CX Contact Help

**Compliance Tools** 

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# Compliance Tools

### 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The content of this document has been moved and is no longer being updated in this location.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 the compliance tools used to restrict contact attempts. The compliance tools include the following:

- Attempt Rules
- Custom Timezones
- Location Rules
- Custom Rules
- Contact Times
- Contact Dates

## Attempt Rules

Use the **Attempt Rules** option to specify certain conditions that, when met, suppress a contact attempt. The following conditions can make up an Attempt Rule:

Required	Indicate whether the rule is <b>Required</b> . If a rule is <b>Required</b> , CX Contact will apply it to all new and existing campaigns, even ones that are currently running. If a rule is not <b>Required</b> , it is considered an <b>Optional</b> rule and must be manually applied to all applicable campaigns. You do this when you create or modify a new campaign template or campaign group. See the instructions below.
Priority	Set the priority of this rule. If you have multiple rules the priority value denotes the order in which the rules will be applied. A lower priority value indicates a higher priority, with 1 being the highest priority.
Rule Scope	Specify if the rule should be applied at the <b>Tenant</b>

	level or at the <b>Campaign Group</b> level.
Do Not Contact if	Fill in the values for the contact attempt rule. For example, <i>Do not contact if 4 Outbound attempts</i> <i>have been made in the last 5 hours.</i> Select <b>Today</b> when you want to count the attempts made today (after the last midnight) and select <b>In the last</b> when you you want to count attempts made in during a specific time.
Count By > Call Results	Define the attempt rule by call result status. By default, the following 12 call results are pre- selected. • Busy • No Answer • Answering Machine • Fax Detected • Overflowed • Abandoned • Dropped • Dropped No Answer • Silence • Answer • Wrong Party • Wrong Number Refer to the Call Results table on the Delivery and Retry Options page for a description of each call result.
Count By > Disposition Codes	Define the attempt rule by Disposition Code. For details refer to the Treatments based on Disposition Codes section in the Delivery and Retry Options page and the Dispositions section in the Administrator's Guide.
Contact Results	Select the call results that should be included as part of the Attempt Rules definition.
Count Attempts Using	<ul> <li>Indicate whether to count previous attempts only:</li> <li>To the same Client ID.</li> <li>To the Device.</li> <li>To the same Client ID/Device combination - for example, if two people share the same phone number but have different accounts, this option allows you to control attempts for each person.</li> <li>Note: When Device or ClientID/Device is selected, additional options will be presented, allowing you to target specific Device fields (including all Devices), and to also define a Device type.</li> </ul>

	For example All Devices that are Mobiles enables you to control the number of attempts made to mobile phones.
То	Specify the location of previous attempts (that otherwise meet the conditions above) to count. If not specified, previous attempts to anywhere (using the current Client ID or Device, as specified above) are counted.
Count attempts between times	Indicates the number of outbound attempts that were made today during a specific time period. The Attempt rule will only count attempts made within the defined time period. Attempts made outside this time period will not be counted by this rule. <b>Note:</b> The <b>Start Time</b> and <b>End Time</b> options are only available when <b>Count attempts between times</b> is turned on. The Timezone source field is not editable. It is set within the campaign group settings.
Apply Disposition Code	Select a Disposition Code to be applied to the call attempt when the outcome is a negative rule check result. Treatment could be defined for this Disposition Code. If no Disposition Code is selected, Treatment can be applied to "Cancel Record" call result.





Edit, Delete, or Duplicate an Attempt Rule

On the main **Attempt Rules** page, use the **Actions** menu next to any Attempt rule to do any of the following:

- Edit Click the pencil icon.
- Delete Click the trash can icon.
- Duplicate Click the document icon. The **Duplicate Attempt Rule** dialog box opens with the settings
  from the original rule populated. You can change any or all of them. If you do not change the name of
  the Attempt rule, it will inherit the name of the original Attempt rule, with **\_duplicate1** appended to it.

## Custom Timezones

Use the **Custom Timezones** option to assign a timezone to phone numbers containing a specific country code, area code, and optionally exchange. For example, you can assign the EST timezone to all national rate phone numbers.

How to	<ul> <li>Option 1: On the Custom Timezones tab, click New and then specify the country code, area code, exchange code, and timezone that should be applied. If the exchange code is not specified, "any exchange code" is assumed.</li> </ul>
enable	<ul> <li>Option 2: On the Custom Timezones tab, click From file to import a CSV file containing a list of timezones that should be applied. This file does not require any headings, and once the file is imported into CX Contact, each record from the file will appear as a separate entry in the list of custom timezones.</li> </ul>

### Edit or Delete Custom Timezone Rules

On the main **Custom Timezones** page, use the **Actions** menu next to any rule to edit or delete the rule:

- Edit Click the pencil icon.
- Delete Click the trash can icon.

## Location Rules

Location rules suppress contact attempts based on the location of a contact or device.

Each Location rule is made up of the following attributes:

Name	The rule name must be unique within the account and rule type, and may contain letters, digits, hyphens, and underscores, and spaces.
Required	Specify if this is a <b>Required</b> rule. If a rule is <b>Required</b> , CX Contact will apply the rule to all new and existing campaigns, even ones that are currently running. If a rule is not <b>Required</b> , it must be manually applied to all applicable campaigns. You do this when you create or modify a campaign object. See the instructions below for more information.
Priority	Set the priority of this rule. If you have multiple rules the priority denotes the order in which the rules will be applied. A lower priority value indicates a higher priority, with 1 being the highest priority.
Determine location by	The location of the attempt may be based on the <b>Device</b> or the <b>Contact</b> .
Do not contact locations	<ul> <li>Specify the locations that should be suppressed:</li> <li>Country and Regions - For each Country and Region you can select the Type and Number of the devices to be suppressed, or you can suppress all types and/or all device numbers.</li> <li>Timezones - CX Contact will look for the specified timezone to determine the location. For each Timezone you can select the Type and Number of the devices to be suppressed, or you can suppress all types and/or all device numbers.</li> <li>Country codes - CX Contact will look for the specified country to determine the location. For the specified country to determine the location.</li> </ul>

each Country code you can select the Type and Number of the devices to be suppressed, or you can suppress all types and/or all device numbers.

- Area codes (appears only if you selected Device in the Determine location by field) -Press the New button to specify one or more area codes for which you want to define suppression rules. Enter the area codes, separated by commas. CX Contact will look for the Device's area code to determine the location. For each Area code you can select the Type and Number of the devices to be suppressed, or you can suppress all types and/ or all device numbers.
- Postal codes (appears only if you selected Contact in the Determine location by field) -Press the New button to specify one or more postal codes for which you want to define suppression rules. Enter the postal codes, separated by commas. CX Contact will look for the contact's postal code to determine the location. For each Postal code you can select the Type and Number of the devices to be suppressed, or you can suppress all types and/ or all device numbers.

**Note:** The postal code can include an asterisk (\*) that acts as a wildcard (that is, zero or more instances of any character).

 Anywhere - CX Contact suppresses all contacts, regardless of location. You can select the Type and Number of the devices to be suppressed, or you can suppress all types and/or all device numbers.

Note: Selecting All Types and/or All Devices will completely suppress dialing.

Select the devices to which you want to apply the Location rule.

- All Devices (automatically marks all device numbers 1 to 10)
- All Types (automatically marks all device types)
- Device1... Device10
- Mobile
- Landline
- International
- Ends with '00'

Devices

				• Du	plicated device in Pos	ition	
				• Du	plicated device in List	:	
				• Du	plicated device in Cor	ntact	
				• \/o	in phone		
				vo			
How to enable	On the Location The new rule we you create or of Catternyt Rules Custom Rules Contact Times Contact Times Contact Dates Notice that you all new and ex If you don't wa page and unch campaign object If you want to a campaign grout <b>Required</b> rule template or cas	on Rules tab, so ill appear on tedit a campaign Do Not Contact Supress attempts to li Priority 3 1 2 1 1 2 1 1 1 2 1 1 1 2 1 1 1 2 1 1 2 1 1 2 1 1 2 1 1 2 1 1 2 1 1 2 1 1 2 1 1 2 1 1 2 1 1 2 1 1 2 1 1 2 1 1 1 2 1 1 1 2 1 1 1 2 1 1 1 2 1 1 1 1 2 1 1 1 1 1 1 1 1 1 1 1 1 1	select New and he Location R n object. Location Rules isted locations. Name Flood Earthquake Event Incident Location Rules: Required rules, ns because you Required rules, for that rule. Y rules (rules that ge and select that to the X next to Clic ange	d specify the ules page Required change meaning t u checked I to a campa fou cannot t weren't n he rules fro the name of k the Option arthquak	e location attributes as des and it will populate in the L Earthquake hat those are the rules that Required when you set up ign object, you must return deselect a Required rule w harked as Required rule w harked as Required rule w harked as Required rule to rem the list. The Optional rule of any Optional rule to rem X to remove hal rules Flood X	cribed above. .ocation Rules section when a care automatically applied to the rule. to the Compliance Tools when creating or editing a campaign template or les will appear alongside the hove it from that campaign	n >

Ends with '000'Non-Geographic

• Contains an extension

• On a 'Do Not Contact' list (US/UK only)

#### Edit, Delete, or Duplicate a Location Rule

On the main **Location Rules** page, use the **Actions** menu next to any Custom rule to do any of the following:

- Edit Click the pencil icon.
- Delete Click the trash can icon.
- Duplicate Click the document icon. The **Duplicate Location Rule** dialog box opens with the settings from the original rule populated. You can change any or all of them. If you do not change the name of the Location rule, it will inherit the name of the original Location rule, with **\_duplicate1** appended to it.

## Custom Rules

Use the **New Custom Rule** option to create a rule that will allow or deny outbound dialing according to a user-defined Java Script expression evaluated for each outbound call immediately before dialing occurs. A custom rule enables you to implement customized business rule logic.

#### Important

Useful functions when creating custom compliance rules include:

- AttemptsOnDevice Indicates the number of attempted interactions from a specific device.
- AttemptsOnContact Indicates the number of attempted interactions from a specific contact.

For example, !(\$GSW\_STATE\_CODE == CA && AttemptsOnDevice(24H, [Answer, Abandoned, Overflowed, ...]) > 1)

Each Custom rule is made up of the following attributes:

Name	The rule name must be unique within the account and rule type, and may contain letters, digits, hyphens, and underscores, and spaces.
Required	Specify if this is a <b>Required</b> rule. If a rule is <b>Required</b> , CX Contact will apply the rule to all new and existing campaigns, even ones that are currently running. If a rule is not <b>Required</b> , it must be manually applied to all applicable campaigns. You do this when you create or modify a campaign group. See the instructions below for more information.
Priority	Reserved for future use. Editing this parameter will not yield any results in CX Contact.

Description	Enter an optional explanation of the purpose of the custom rule.
Custom Expression	Enter a Java Script expression that evaluates the conditions for a True or False outcome. True allows the dial to occur. False does not allow the dial to occur. <b>Note:</b> You can refer to the user data values attached to the call using: \$ <user data="" key="" name=""> in expression. For example: (\$0ther15 !== 'Platinum'    new Date().getDate() % 2 === 0).</user>
Apply Disposition Code	Select a Disposition Code to be applied to a call attempt, when the outcome of the call attempt is a negative rule check result. A treatment can be defined for the Disposition Code. If a Disposition Code is not selected, the "Do Not Call" call result treatment may be applied.

On the **Custom Rules** tab, select **New** and specify the custom rule attributes as described above.

The new rule will appear on the **Custom Rules** page and it will populate in the **Custom Rules** section when you create or edit a campaign group.



#### Edit or Delete Custom Rules

On the **Custom Rules** page, use the **Actions** menu next to any rule to edit or delete the rule:

- Edit Click the pencil icon.
- Delete Click the trash can icon.
- Duplicate Click the document icon. The **Duplicate Custom Rule** dialog box opens with the settings

from the original rule populated. You can change any or all of them. If you do not change the name of the Custom rule, it will inherit the name of the original Custom rule, with **\_duplicate1** appended to it.

## Contact Times

Use the **Allowed Contact Times** option to define allowable calling windows for each day of the week for a given region for a specific set of devices. Contact attempts to your contacts in those regions will be limited to the time frame you define on each day, regardless of your contact center hours and campaign time frames. For example, if you have campaigns running from 8AM to 9PM local time, and you restrict attempts in New York to 9AM to 7PM, no attempts will be made to anyone in New York until 9AM, and they will end at 7PM.

To enable Contact Times by region:

- 1. Select the **Contact Times** tab.
- 2. Select **New > Contact Time** and configure the following:

Option	Description
Name	The Contact Time name.
Required	Select Required to apply the Contact Time rule to all Campaign Groups.
Priority	Set the priority of this rule. If you have multiple rules the selected priority denotes the order in which the rules will be applied. A lower priority value indicates a higher priority, with 1 being the highest priority.
Country	Select the target country for this rule or select "Any Country" to apply this rule regardless of the country being contacted.
Region/State/Province	Select one or more Regions, States or Provinces for this rule. If not selected all regions/States/Provinces for this country will be applied to this rule.
Devices	Select one or more devices associated with this new rule. <b>Note: Any Device</b> can only be selected when no other device was selected.
	Select one or more of the following devices. <b>Note:</b> <b>Any Device Type</b> can only be selected when no other device was selected.
Device Type	Any Device Type
	• Mobile
	• Landline

	<ul> <li>International</li> <li>Ends with '00'</li> <li>Ends with '000'</li> <li>Non-Geographic</li> <li>Contains an extension</li> <li>On a 'Do Not Contact' list (US/UK only)</li> <li>Duplicated device in Position</li> <li>Duplicated device in List</li> <li>Duplicated device in Contact</li> <li>Voip phone</li> </ul>
Timezone Source	Indicates the timezone source.
Apply Disposition Code	Select a Disposition Code to be applied to a call attempt when the outcome is a negative rule check result If a Disposition Code is not selected, Treatment can be applied to the "Cancel Record" call result.
Strict	<ul> <li>Select one of the following:</li> <li>ON - Records matching the rule criteria are not attempted until the time window is open.</li> <li>OFF - Records are attempted regardless of the time window and are blocked for dialing during the pre-dial validation step if the rule check is negative.</li> </ul>
Allowed Contact Times	<ul> <li>The following types of restrictions are available for any given region:</li> <li>Unrestricted - allows contact attempts to occur in accordance with the start and end time specified for that Campaign Group.</li> <li>Select Hours - allows you to explicitly define the hours for making contact attempts for that day. If for example, you are restricting contact attempts from 9AM to 7PM, select 9AM from the Start menu, and select 7PM from the End menu.</li> <li>No Contact - When you select this option, no contact attempts will be made to the affected region on the specified day.</li> <li>Note: When Strict is enabled All days have the same contact time is enabled and cannot be unselected.</li> </ul>

#### Tip

If each day of the week will have the same allowable contact times, check **All days** have the same contact time when creating the new rule.

New C	ontact Tim	ies					
State/Pro	vince	Alabama	•				
Allowed	contact times						
All days h	nave the same contac	t time					
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
	SelectHours 🗸	Unrestricted 👻	NoContact 🗸	NoContact 🗸	Unrestricted 🗸	SelectHours 👻	SelectHours 👻
Start	Unrestricted		9:00 AM 🗸	9:00 AM 🗸 🗸	9:00 AM 🗸	9:00 AM 🗸	9:00 AM 🗸
End	SelectHours NoContact		9:00 PM 👻	9:00 PM 👻	9:00 PM 👻	7:00 PM 🗸	9:00 PM 👻

#### Edit or Delete Contact Times Rules

On the Allowed Contact Times by Country and Region/State/Province' page, use the **Actions** menu next to any rule to edit or delete the rule:

- Edit Click the pencil icon.
- Delete Click the trash can icon.

## Contact Dates

Use the **Do Not Contact Dates** option to specify a date in which contact attempts cannot take place. This will apply to any device in the account and will be effective for 24 hours (midnight to midnight, local to the device).

#### Important

Changes to **Do Not Contact Dates** are refreshed by CX Contact every minute. If a Do Not Contact Date is defined for the current day, all dialing for that day will stop in one minute or less.

How to	On the <b>Do Not Contact Dates</b> tab, add a Label (for example Christmas Day) and select
enable	the associated date (for example December 25).

#### Delete Contact Dates Rules

You cannot edit a **Contact Dates** rule - the only option is to delete the existing rule and create a new one with a different date or label. To delete the rule, check the box next to the rule name and click the trash can icon.

## **Related Topics**

- Timezone Assignment
- Create and Manage Suppression Lists
- Import Specification Files