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Outbound Contact Expert User's Guide

Campaigns

12/16/2025

Campaigns

A Campaign is a flexible master plan that organizes Calling Lists and Agent Groups (or Place Groups) for dialing calls and handling call results. A Campaign can be assigned to multiple Campaign Groups. Campaign Groups are structures for organizing and managing an automated process of making outbound calls to the destinations specified in Calling Lists. Campaigns page lists all the campaign templates, campaign groups, and contact lists available in the system. The assigned weight label appears next to the name of the contact list.

To view and manage Campaigns in a specific server, select the server in the **Outbound Contact Server** drop-down above the list.

The screenshot shows the Genesys Campaigns page. At the top, there's a navigation bar with tabs: Campaigns, Calling Lists, Other Lists, and Outbound Schedules. Below the navigation bar, there's a header section with a search bar and a dropdown menu for 'Outbound Contact Server' with the text 'Select a server'. Below this is a table listing campaigns. The table has columns: Name, Actions, Status, Optimization parameter, Target Value, VTD, Trunk Group DN, Schedule, and Max Q Size. The table shows two main campaign groups: 'Demo November 2023' and 'Demo December 2023'. Under 'Demo November 2023', there's a 'Bravo Campaign' with a sub-entry 'Bravo Campaign@AG_Test_7' which has a status of 'Not Loaded' and an optimization parameter of 'Agent Busy Factor'. Under 'Demo December 2023', there's an 'Alpha Campaign' with a sub-entry 'Alpha Campaign@AG_Test_1' which has a status of 'Not Loaded' and an optimization parameter of 'Average Waiting Time'. At the bottom of the page, there's a configuration panel with sections for 'Dial Mode' (set to 'Preview'), 'Optimization Method' (set to 'Average Waiting Time'), 'Target Value' (set to '80'), 'Priorities for record types' (a table with columns 'Record Type', 'Priority', and 'N Record'), and 'Stat Server' (set to 'SS').

Record Type	Priority	N Record
General	1	1
CampaignRescheduled	1	1
CampaignCallBack	1	2

Use the media controls next to each campaign group to start, pause, or stop dialing activity.

- Load - Load the Campaign Group.
- Start - Starts or resumes dialing.
- Pause - Pauses dialing activity.
- Unload - Unloads the Campaign Group.

Warning

Unloading Campaign Group resets all campaign group statistics.

The following search and filter functions are available on the Campaigns page:

Expand/Collapse	<p>Click Expand All to view all campaigns, associated campaigns groups, and their calling lists.</p> <p>Click Collapse All to hide all campaign groups and contact lists associated with each campaign Group.</p>
Search box	Enables you to search the campaigns dashboard for any value within a campaign, campaign group, or contact list.
Any Status	<p>Enables you to filter the list of campaigns by the status of the campaign group. Options are as follows:</p> <ul style="list-style-type: none"> • Any Status • Not Loaded • Active • Running • Waiting Unload • Unload in Progress • Unknown or Error

For each Campaign group, the following properties are displayed:

- **Dial mode:** The name of the Dialing Mode for the selected Campaign Group.
- **Optimization Method:** A method to optimize direct dialing algorithms in the predictive dialing modes. The methods include: Agent Busy Factor, Average Waiting Time, and Overdial Rate.
- **Target Value:** The target value for the optimization method. The unit of measure depends on the optimization method in the Optimization Method field.
- **Priorities** for record types: If you are defining a Load, Start, or Set Dialing Mode action, specify the Priority and N Records for each record type listed.
 - **Priority:** The priority for this record type. A value of 1 is the highest priority; 0 (zero) means do not dial. The recommended priority values are 0, 1, 2, or 3.
 - **N Records:** The number of records of this type to fetch from the buffer for dialing. A valid value is any positive number or 0. 0 (zero) means do not dial.
- **Stat Server:** The name of the Stat Server to which the Campaign group is connected.
- **IVR Profile:** IVR Profiles are voice (VoiceXML), call control (CCXML), announcement, or conference applications that specify the unique service information required as this application executes within the Genesys Voice Platform.
- **Interaction Queue:** Interaction Queues are Script objects used by Interaction Server to handle outbound interactions in Push Preview Dialing mode. OCX allows you to set the following dial modes:

Dial mode	Description
Predictive	Dials calls from a calling list and predicts agent

Dial mode	Description
	availability. Recommended for high-volume, low-value Campaigns.
Preview	Dials calls from a calling list only when an agent previews a calling list record and manually requests a call to be dialed. Recommended for low-volume, high-value applications, where individual ownership of accounts is the highest priority.
Progressive	Dials calls from a calling list only when an agent is available. Recommended for low-volume, high-value Campaigns.

Important

Changing the dial mode and optimization method in OCX is temporary. It lasts only until the Campaign is stopped or you change the setting. To change from Predictive or Progressive Dialing mode to Preview Dialing mode, the Campaign must be stopped and restarted.