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# Outbound Contact Deployment Guide

Records

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# Records

A *record* is a row in a Calling List table. Among its mandatory fields, each record contains:

- A phone number.
- The fields that determine how the records should be processed (Record Type and Record Status).
- The fields that store time boundaries and time zone information; these enable runtime determination of whether the record can be dialed.

A record can contain as many custom fields as needed as defined in a Calling List Format object.

## Chained Records

*Chained records* are multiple records for the same customer in a calling list. These records typically contain alternative phone numbers such as home, business, and cellular phone. In addition, each record in the same chain can have different time boundaries and time zone information, and it can also have different values stored in its business data fields.

## Flexible Prioritization of Record Types

*Flexible prioritization* means that a user can assign his or her own order of priority to specific record types for dialing purposes.

A record type with a higher priority is dialed before a record with a lower priority. Genesys Administrator (Outbound) automatically passes the priority for the record type and its parameters to Outbound Contact Server with events.

The user can prioritize the following record types in the Predictive/Progressive dialing mode and in the Preview dialing mode.

- General records--All records are initially marked General in an Outbound Contact calling list. The status may change after the record has been dialed. Either an agent or a treatment in response to a call result can change the status of a record.
- Campaign Callback records--An agent reschedules a campaign callback record at the customer's chosen time. The callback may be dialed automatically or delivered to an agent's desktop softphone as a preview record depending on the value of the predictive\_callback option. See [Outbound Contact Configuration Options](#) for more information about this option.

Note:

See the "Communication Protocols" chapter of the *Outbound Contact Reference Manual* for information on the events distributed when rescheduling records.

- Campaign Rescheduled records--Treatments reschedule these records based on the detected call results. A campaign rescheduled call is dialed automatically and handled by any agent who is working on that particular campaign.

Record types can be prioritized in Genesys Administrator (Outbound Contact section) or in a third-party application that manages the campaigns. You control record-type priorities in Genesys Administrator (Outbound) through the Operations .3E Outbound Contact .3E Dialing Sessions .3E Priorities tab.

Note:

You can also configure SCXML treatments to select which record in a chain is dialed first and which is dialed next. For more information, see [SCXML-Based Treatments](#).

If you are using a third-party application (instead of Genesys Administrator) to communicate with OCS, you must use the Key/Value List from the Genesys Common Library with the events to transfer the priority information to OCS.

You must define the priorities in the following user requests, that are sent through the Communication DN:

- CM\_ReqLoadCampaign
- CM\_ReqStartDialing
- CM\_ReqSetDialingMode

For more information about these user requests, see "Communication DN API" in the *Outbound Contact Reference Manual*.

Note that flexible prioritization does not apply to Personal Callback records or Personal Rescheduled records. An agent schedules or reschedules a personal call back record at the customer's chosen time. OCS automatically delivers a Personal record to the agent's desktop at the specified time, and the same agent who initially handled the record processes the Personal Call Back or Personal Rescheduled record.