

Genesys Cloud - how to - Outbound - Create a set of rules

Workforce Management

Business Units

Management Units

Agents

Activity Codes

Sched

Under **Outbound**, click **Rule Management**.

Outbound

Campaign Management

List Management

Contactable Time Sets

Call Analysis Responses

 Rule Management

Wrap-up Code Mappings

Event Viewer

Outbound Settings

Search Audits

Activity Directory Documents Performance Reports

Outbound / Rule Management / Call Rule Sets

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Wrap-up Code Mappings

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Outbound Settings

Call Rule Sets Digital Rule Sets Campaign Rules

Click the **Call Rule Sets** tab and click **Create New**.

Create New

Name

Search

Page < 1 > of 1 | 25 records per page

Activity Directory Documents Performance Reports

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Call Rule Set Name

In the **Call Rule Set Name** box, type a descriptive name.

Sample Resources

Contact List (for column name examples)

Selection Optional...

Save and Add Rules Save Cancel

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Select a **Contact List** and

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Call Rule Set Name

Call Rule Example

Sample Resources

Contact List (for column name examples)

Selection Optional...

Searching...

Save and Add Rules Save Cancel

Queue (f

Selectio

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Call Rule Example

Sample Resources

Contact List (for column name examples)

CL Example

Save and Add Rules Save Cancel

Queue (for wrap-up code examples)

Selection Optional...

Default Inbound Queue

Sales

Support

Test Queue

queue.

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Call Rule Example

Sample Resources

Contact List (for column name examples)

CL Example

Save and Add Rules

Save

Cancel

Click **Save and Add Rules**.

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Call Rule Name

Type a name in the Call Rule Name box.

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Category

Pre-Call

Conditions

Type

Selection Required...

Invert

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Call Rule Name

Select Pre-Call or Wrap-up from the Category list.

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Search Audits

Category

Pre-Call

Conditions

Type

Selection Required...

+ Add New Condition

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Call Rule Name

Call Rule Example

Category

Pre-Call

Conditions

Type

Selection Required...

+ Add New Condition

Actions

Type

Select a condition from the **Type** list. Refer to your PDF for the different types.

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In this example, select
Contact List Column.

Call Rule Name

Call Rule Example

Category

Pre-Call

Conditions

Type

Selection Required...

Contact List Column

Contact Property

Data Action

Phone Number

Phone Type

Selection Required...

Invert Condition

No

+ Add New Action

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Click the **Column Name** list.

Call Rule Name

Call Rule Example

Category

Pre-Call

Conditions

Type

Contact List Column

Invert Condition

No

Column Name

Selection Required...

Comparator

Selection Required...

+ Add New Condition

Actions

Type

Selection Required...

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Conditions

Type
Contact List Column

Column Name
Selection Required...

Comparator
Selection Require

Select the column you want the call rule to apply to.

- Account
- Cell
- Email
- First Name
- Home
- Last Name
- Work

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Call Rule Name
Call Rule Example

Category
Pre-Call

Conditions

Type
Contact List Column

Invert Condition
No

Column Name
Account

Comparator
Click the **Comparator** list. Selection Required...

Value

+ Add New Condition

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Call Rule Example

Category
Pre-Call

Conditions

Type
Contact List Column

Invert Condition
 No

Column Name
Account

Comparator
Selection Required...
Text
Begins With
Contains
Ends With
Is
Numeric
Equals

Value

+ Add
Select a comparison operator (comparator).

Actions

Type
Selection Required...

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Call Rule Name
Call Rule Example

Category
Pre-Call

Conditions

Type
Contact List Column

Invert Condition
 No

Column Name
Account

Comparator
Selection Required...
Text
Begins With
Contains
Ends With
Is
Numeric
Equals

Value

+ Add New Condition

Where applicable, type or choose a selection from the **Value** box. This selection establishes what the system compares a condition to.

Actions

Type
Selection Required...



- Campaign Management
- List Management
- Contactable Time Sets
- Call Analysis Responses
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Pre-Call

Conditions

Type **Invert Condition**

Contact List Column No

Column Name	Comparator	Value
Account	Contains	5

+ Add New Condition

Actions

Type

Selection Required...

Click the **Type** list and

+ Add New Action

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Conditions

Type

Contact List Column

Invert Cor

Column Name

Comparator

Data Action

Designate Caller Id

Do Not Dial

Mark Contact as Uncallable

Mark Number as Uncallable

Route Call Based on Skills

Switch to Preview

Selection Required...

select an action type. In this example, we select **Switch to Preview**.

+ Add New Action

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Type

Contact List Column

Invert Condition

No

Column Name

Account

Comparator

Contains

+ Add New Condition

Actions

Type

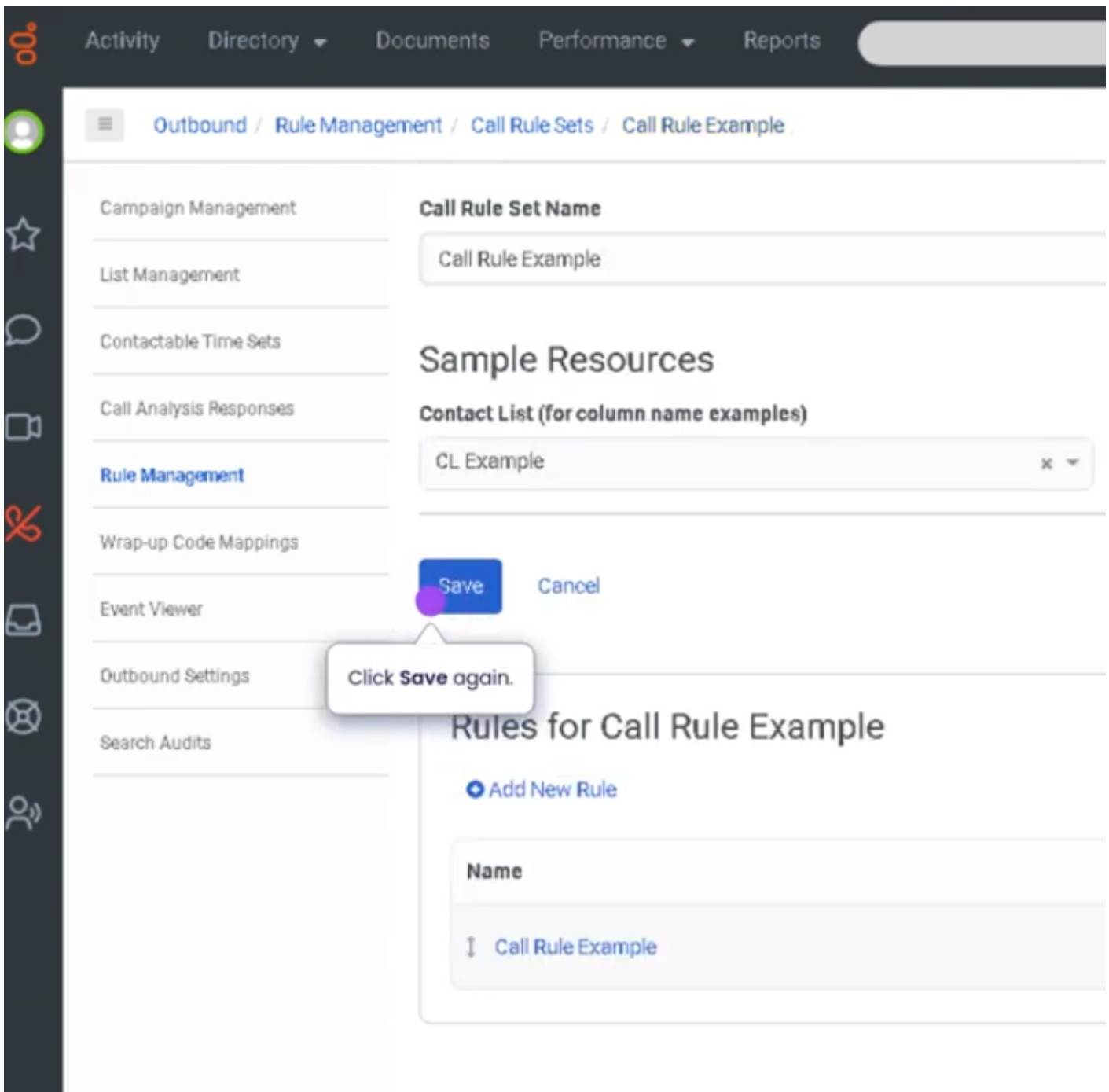
Switch to Preview

Add New Action

Click **Save**.

Save

Cancel



Create a Set of Rules (Genesys Cloud)

Summary

A **Set of Rules** in Genesys Cloud allows administrators or supervisors to define **automated conditions and actions** that control how certain platform behaviors occur. These rules can be

used in various modules such as **routing, dialing campaigns, workforce management, or analytics filters**, depending on the feature being configured.

Rule sets help organizations **standardize decision logic and automate operational processes**, ensuring consistent handling of interactions, contacts, or scheduling conditions without requiring manual intervention.

Utilization

Use Case	Description
Routing logic	Define conditions that determine how interactions are distributed
Campaign dialing rules	Control how outbound contacts are handled
Workforce management policies	Automate scheduling or shift rules
Data filtering	Apply rules for analytics or segmentation
Operational automation	Trigger actions based on predefined criteria

Rule sets help maintain **consistent operational behavior across the platform**.

Best Practices

Practice	Reason
Clearly define rule conditions	Prevents unintended routing or automation
Test rules before deploying to production	Ensures expected outcomes
Keep rule logic simple and well documented	Improves troubleshooting and maintenance
Avoid overlapping or conflicting rules	Prevents unpredictable behavior
Regularly review rule sets	Ensures they remain aligned with operational needs
Use descriptive names for rule sets	Makes administration easier

Example Scenarios

Scenario 1 – Routing Condition for Interactions

Customer interaction enters system
↓
System evaluates configured rule set
↓
Conditions match routing criteria
↓
Interaction routed to appropriate queue

Scenario 2 – Outbound Campaign Rule

Outbound campaign starts
↓
Dialer reviews rule set
↓
Conditions determine which contacts can be dialed
↓
Dialer proceeds with eligible contacts

Scenario 3 – Automated Operational Behavior

System detects defined condition
↓
Rule set triggers predefined action
↓
Platform applies routing or configuration behavior

Key Benefits

Benefit	Explanation
Automation of processes	Reduces manual intervention
Consistent system behavior	Rules enforce standardized logic
Operational efficiency	Improves routing and campaign management
Scalability	Supports large-scale contact center operations
Improved control	Administrators can manage platform behavior through rules

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