Automatic Outbound Calls

This section introduces the core configurations for creating, scheduling, and executing automatic outbound call tasks on the voice service platform.

- Task Management
- SMS Template Management
- Call Roster Management

Task Management

Overview

Task Management is used to create, configure, and schedule automatic outbound call tasks. Through this module, users can bind audio recordings and call lists, flexibly set execution times, and intelligently trigger corresponding SMS notifications based on call status (such as active hang-up or unanswered calls), thereby achieving an automated closed-loop management of outbound call operations.

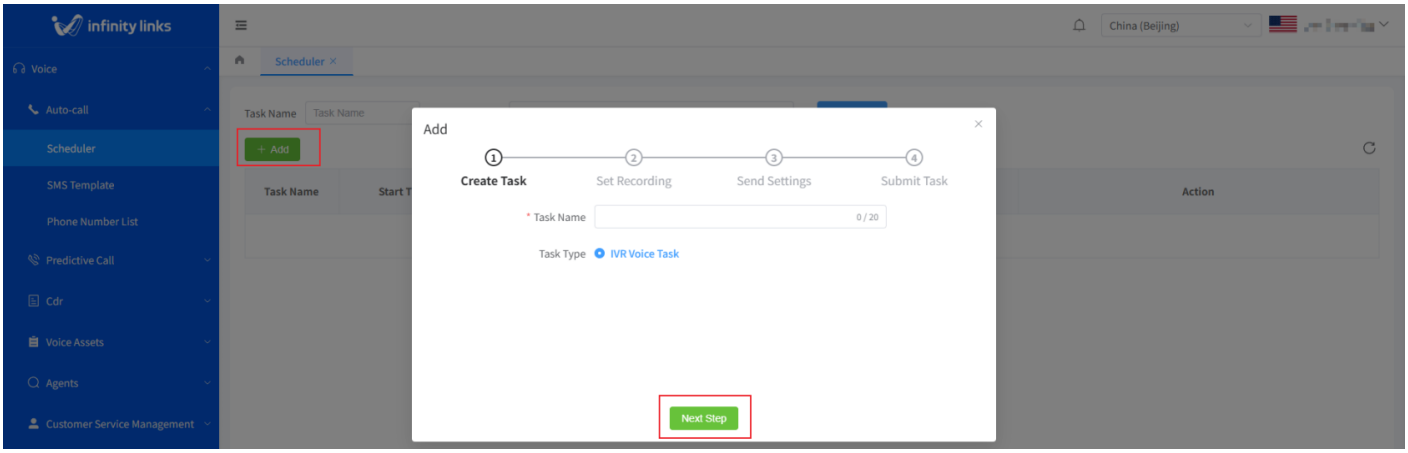
Accessing the Feature

After logging in to the Call Center platform, navigate to **Voice > Auto Call > Scheduler**.

Create Task

Step 1: Set Task Name

On the **Task Management** page, click **Add**. In the dialog box, enter a task name (e.g., **January 2026 Promotion**) and click **Next Setp**.

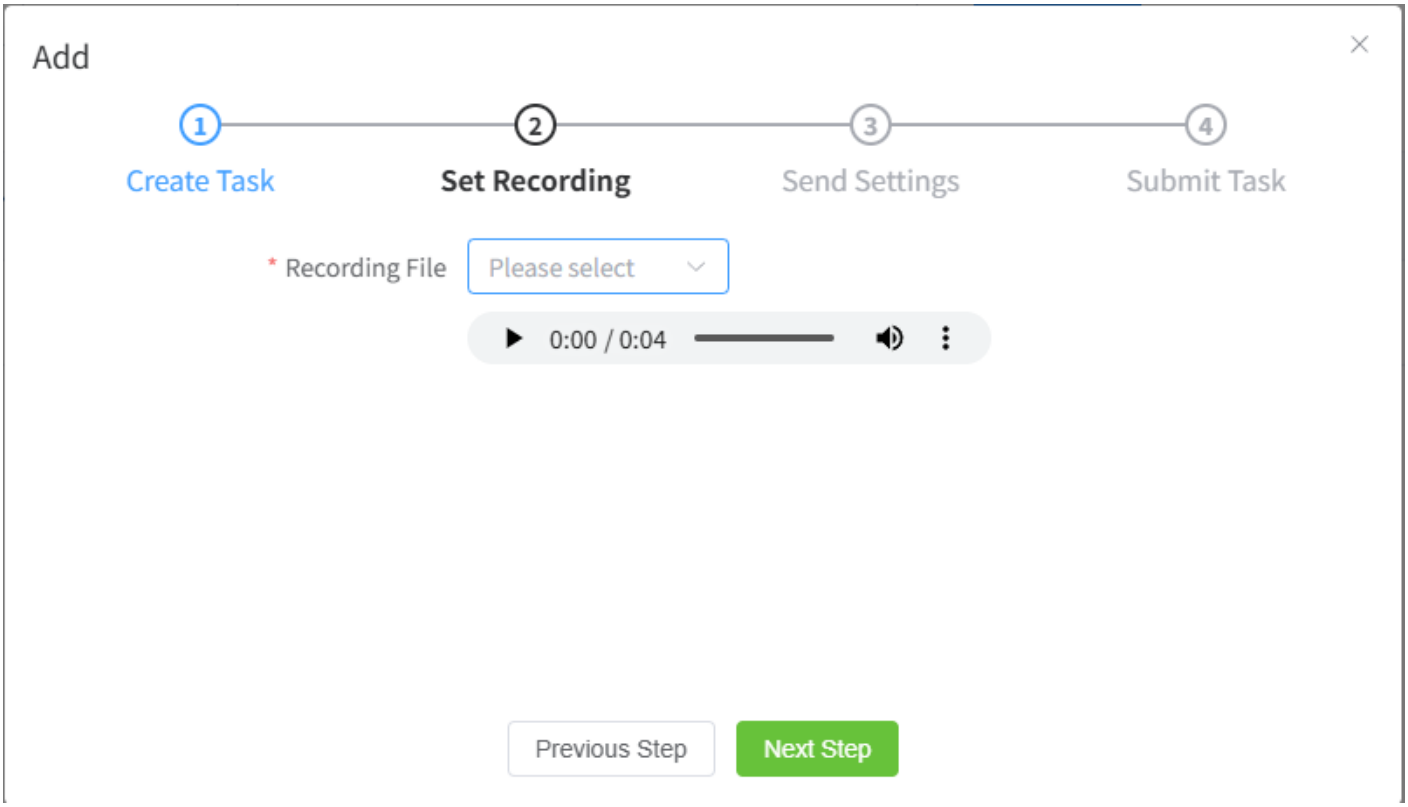


> **Note:** Task names can contain only Chinese characters, English letters, and numbers. Special characters (e.g., **@**, **#**, and **%**) are not allowed.

Step 2: Configure the Recording

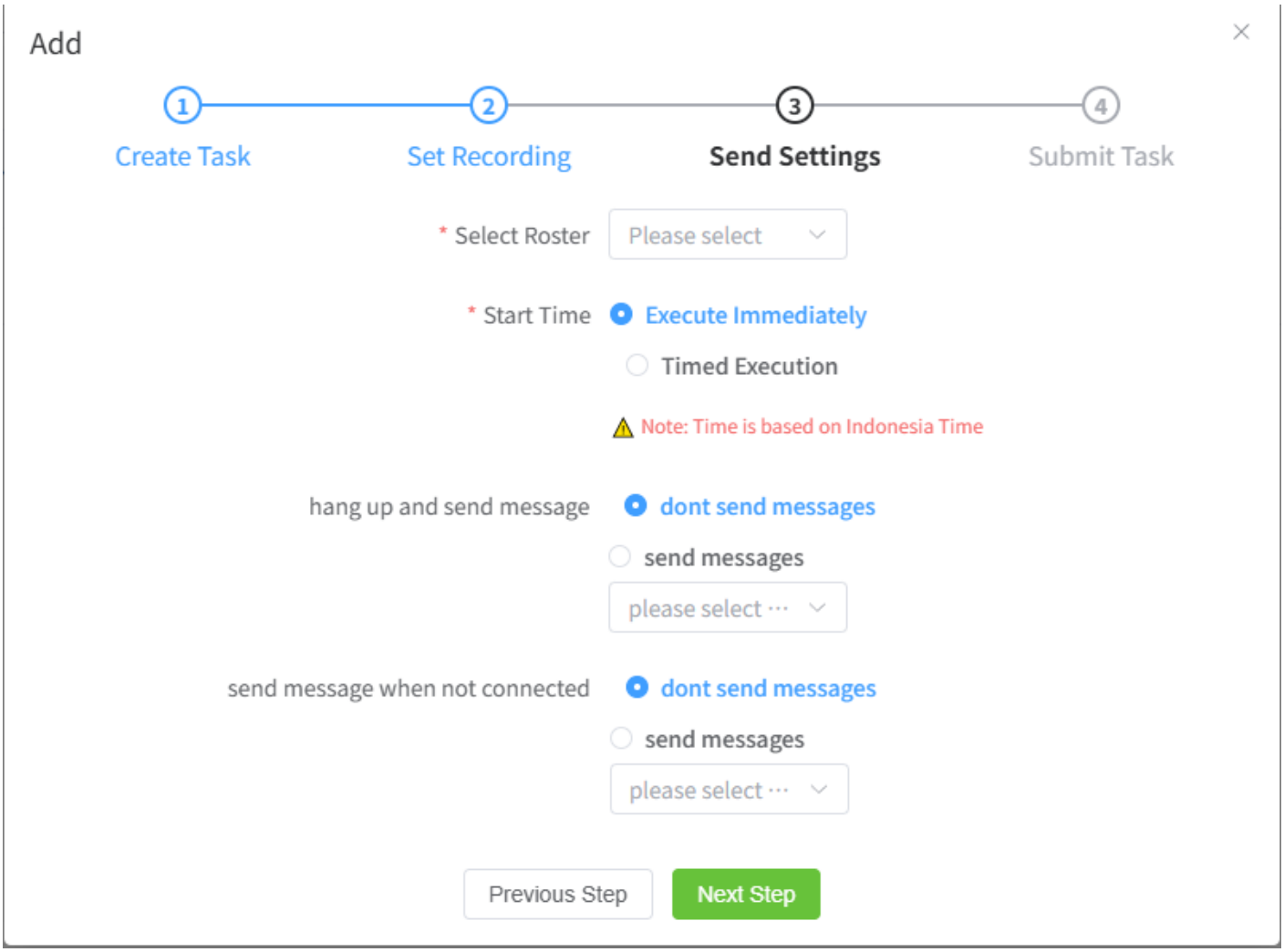
In the **Recording File** drop-down list, select a previously uploaded MP3 file (e.g., **Promotion Campaign - Chinese.mp3**), then click **Next Setp**.

> **Note:** The recording file must be uploaded in advance through the **Recording File Management** module. For more information, see the **Recording File Management** section.



Step 3: Configure Send Settings

On the **Send Settings** page, configure the following task parameters:



Select Roster: Select a previously uploaded roster from the drop-down list (e.g., **Promotion_List_202601.xlsx**).

> **Note:** The roster must be uploaded in advance through the **Call Roster** module. For more information, see the **Call Roster Management** section.

Start Time: Select **Run Immediately** to start the task immediately after it is created, or **Scheduled Run** to specify a future start time.

> Note: The system uses Western Indonesia Time (WIB, UTC+7) for task scheduling.

SMS Settings (requires an active SMS account): Configure the following two types of SMS settings based on your business requirements:

Send SMS on Call Disconnect: This SMS is triggered when the customer hangs up after answering the call, helping complete the post-call follow-up. To enable this feature, select **Send**

SMS, then choose a pre-approved SMS template from the **SMS Template** drop-down list. For more information, see the **SMS Template Management** section. After the call ends, the system sends the SMS using the selected template.

> **Example:** SMS content: **Dear Customer, your requested service has been completed. Please check it. [Company Name]**

Send SMS on Unanswered Call: This SMS is triggered when a call is not answered (e.g., no answer, powered off, or busy), helping notify the customer. To enable this feature, select **Send SMS**, then choose a pre-approved SMS template from the **SMS Template** drop-down list. For more information, see the **SMS Template Management** section. After the call ends, the system sends the SMS using the selected template.

> **Example:** An outbound call is placed to the customer, but the call is not answered. The system automatically sends the following SMS: **"[XX Company] You have a missed call. Reply with 1 for more information."**

Tip: Both SMS types can be enabled at the same time. The system automatically determines which SMS to send based on the actual call outcome.

Step 4: Submit the Task

After confirming that all information is correct, click **Submit** to create the task.

Edit a Task

1. On the **Task Management** page, locate the target task, click **Edit** in the **Actions** column, and then select **Edit** from the drop-down menu.
2. In the dialog box, modify the task name.
3. After confirming that all information is correct, click **Confirm** to update the task information.

Pause a Task

1. On the **Task Management** page, locate the target task, click **Edit** in the **Actions** column, and then select **Pause** from the drop-down menu.
2. In the dialog box, click **Confirm** to pause the task.

SMS Template Management

Overview

The **SMS Template Management** module is used to create, manage, and maintain SMS templates for automatic outbound call tasks. By creating standardized SMS templates in advance and supporting dynamic variable replacement, the system can automatically send the appropriate SMS messages to customers based on different business scenarios, such as unanswered call notifications and promotional campaigns, improving outbound call efficiency and ensuring consistent customer communications.

Accessing the Feature

After logging in to the Call Center platform, navigate to **Voice** > **Auto-Call** > **SMS Templates**.

Add a Template

1. On the **SMS Templates** page, click **Add** in the **Actions** column.
2. In the dialog box, enter a template name (e.g., **Unanswered Call Notification_2026 Promotion**) and the SMS message content.

Edit a Template

1. On the **SMS Templates** page, locate the target template and click **Edit** in the **Actions** column.
2. In the dialog box, modify the template name or SMS content.
3. After confirming that all information is correct, click **Confirm** to update the template information.

Delete a Template

1. On the **SMS Templates** page, locate the target template and click **Delete** in the **Actions** column.
2. In the confirmation dialog box, click **Confirm** to permanently delete the template.

Call Roster Management

Overview

The **Call Roster Management** module is used to centrally manage customer phone number data for automatic outbound call tasks. By uploading standardized phone number files, the system automatically validates the phone number format and generates call rosters, ensuring efficient and accurate execution of outbound call tasks.

Accessing the Feature

After logging in to the Call Center platform, navigate to **Voice** > **Auto Outbound Calls** > **Task Roster**.

Add a Call Roster

1. On the **Task Roster** page, click **Add**.
2. In the dialog box, enter the roster information.

- **Roster Name:** Enter a roster name (e.g., **January 2026 Promotional Campaign**).
- **Upload Phone Number File:** In the **Phone Number File** section, click **Download Template** to download the standard template, then complete the file according to the following requirements:
  - Enter phone numbers without the country code prefix (e.g., for Indonesian phone numbers, enter **87630021323**).
  - Only **.xlsx** (Microsoft Excel Workbook) files are supported.

After completing the template, click **Select File** to upload the completed file.

After the file is uploaded successfully, the system automatically validates the phone number format.

Edit a Call Roster

1. On the **Call Roster** page, locate the target roster and click **Edit** in the **Actions** column.
2. In the dialog box, modify the roster name or description.
3. After confirming that all information is correct, click **Confirm** to update the roster information.

Delete a Call Roster

1. On the **Call Roster** page, locate the target roster and click **Delete** in the **Actions** column.
2. In the confirmation dialog box, click **Confirm** to permanently delete the roster.