Predictive Call Operation Manual

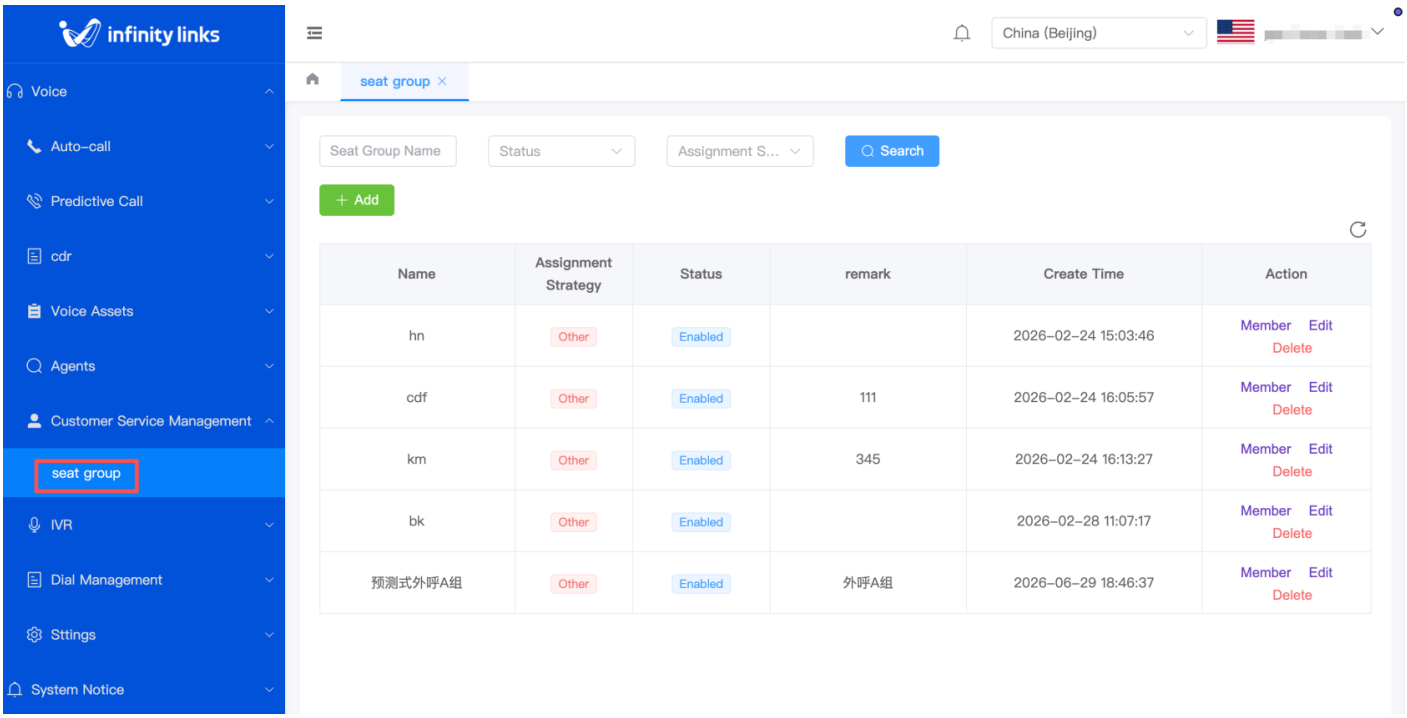
- 1.Create an Agent Group
- 2.Create Task
- 3.Task Progress Monitoring

1.Create an Agent Group

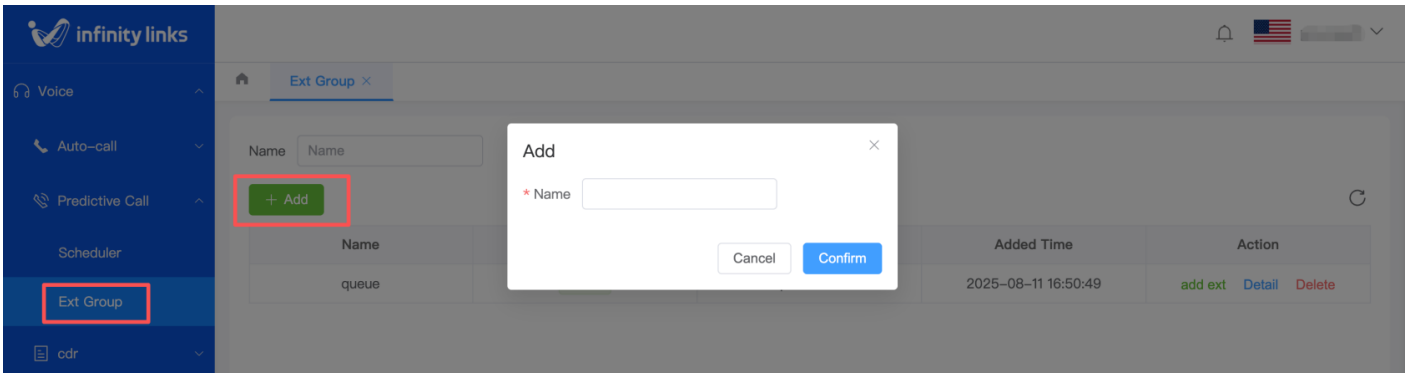
> Tip: This step is optional. If you only need to specify a single extension for outbound calls, you can skip this step. Creating an agent group is only necessary when you need to batch assign multiple agents for collaborative calling.

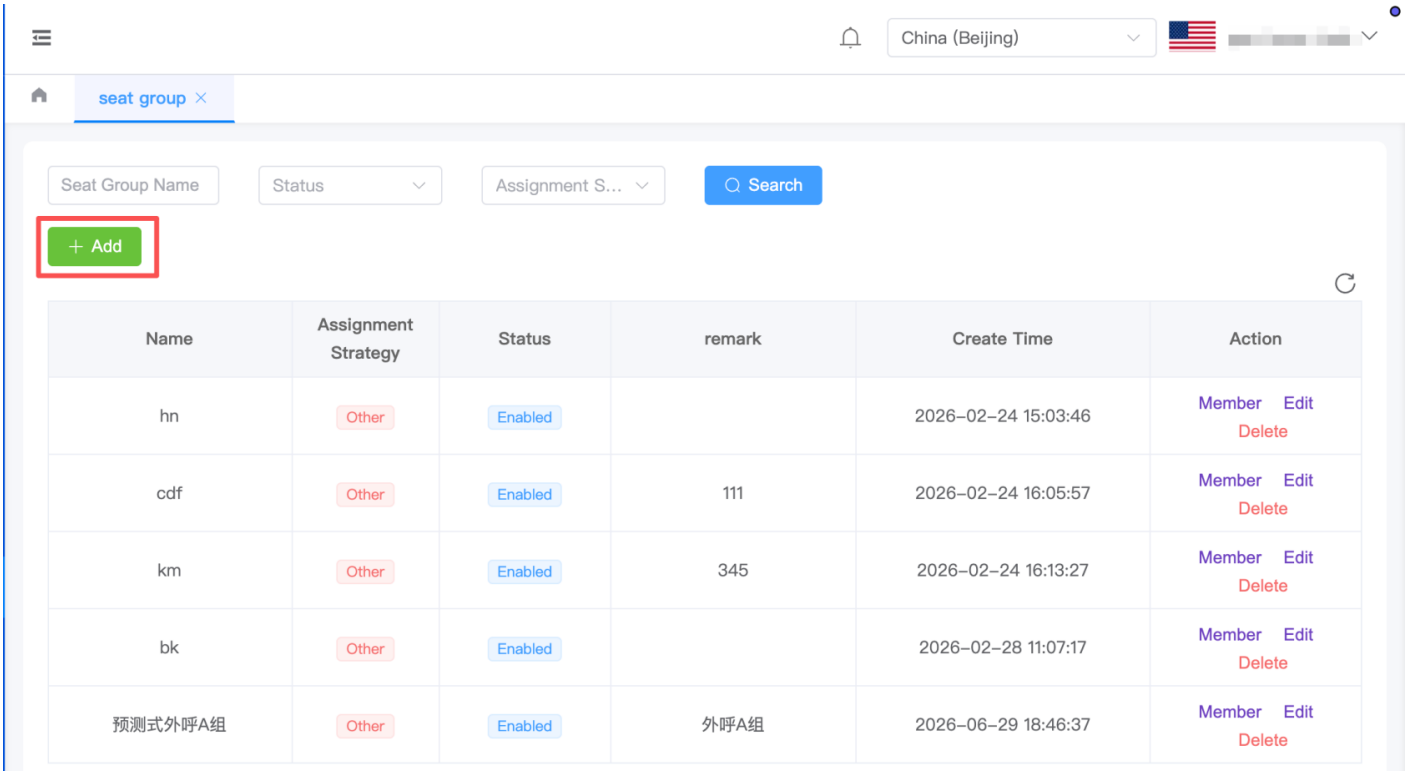
Accessing the Feature

1.Log in to the admin console. In the left-side navigation pane, select Voice, then click Customer Service Management from the expanded menu. On the subsequent page, choose Seat Group to access the management interface.

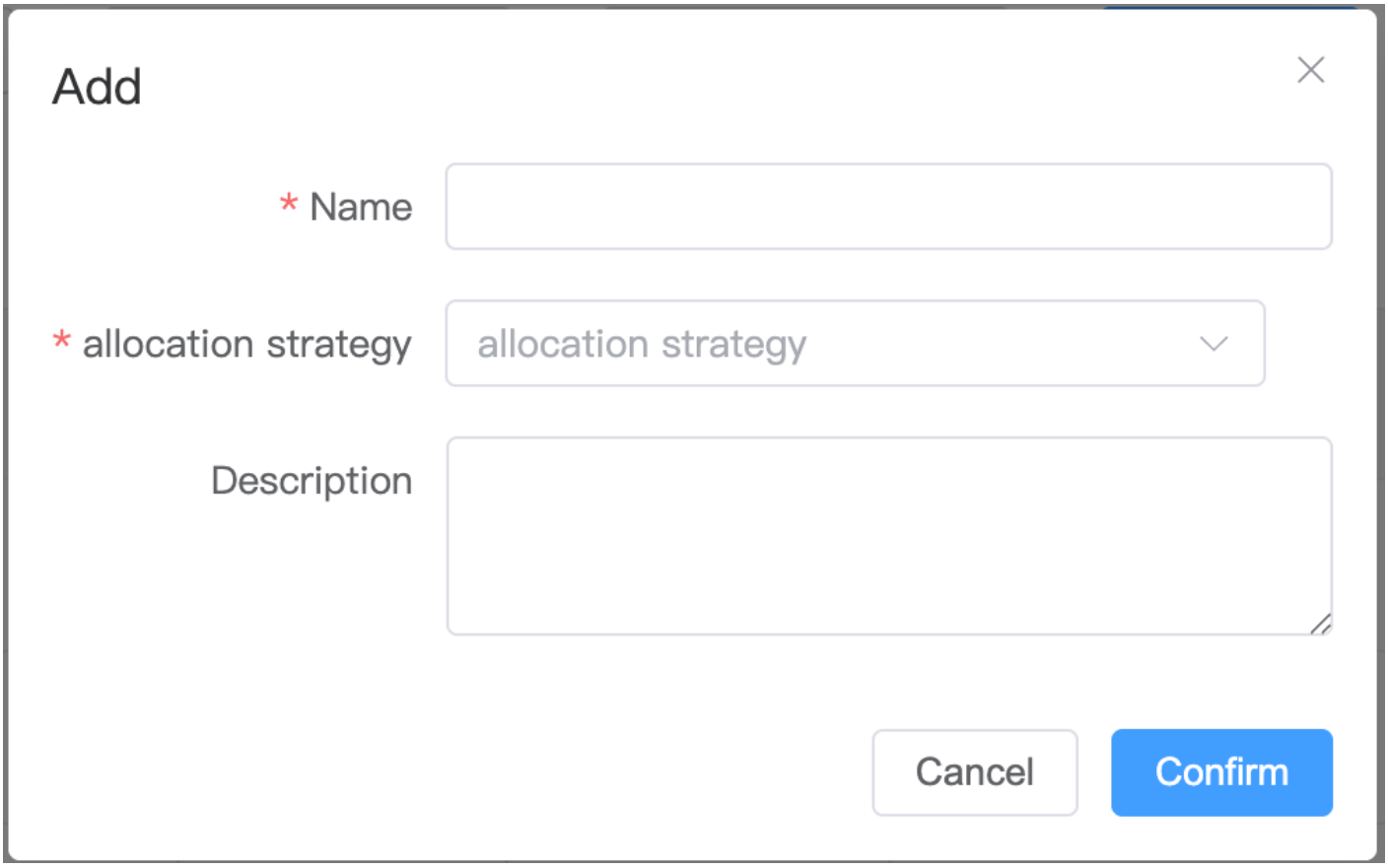


2.On the Seat Group list page, click **"Add"** .

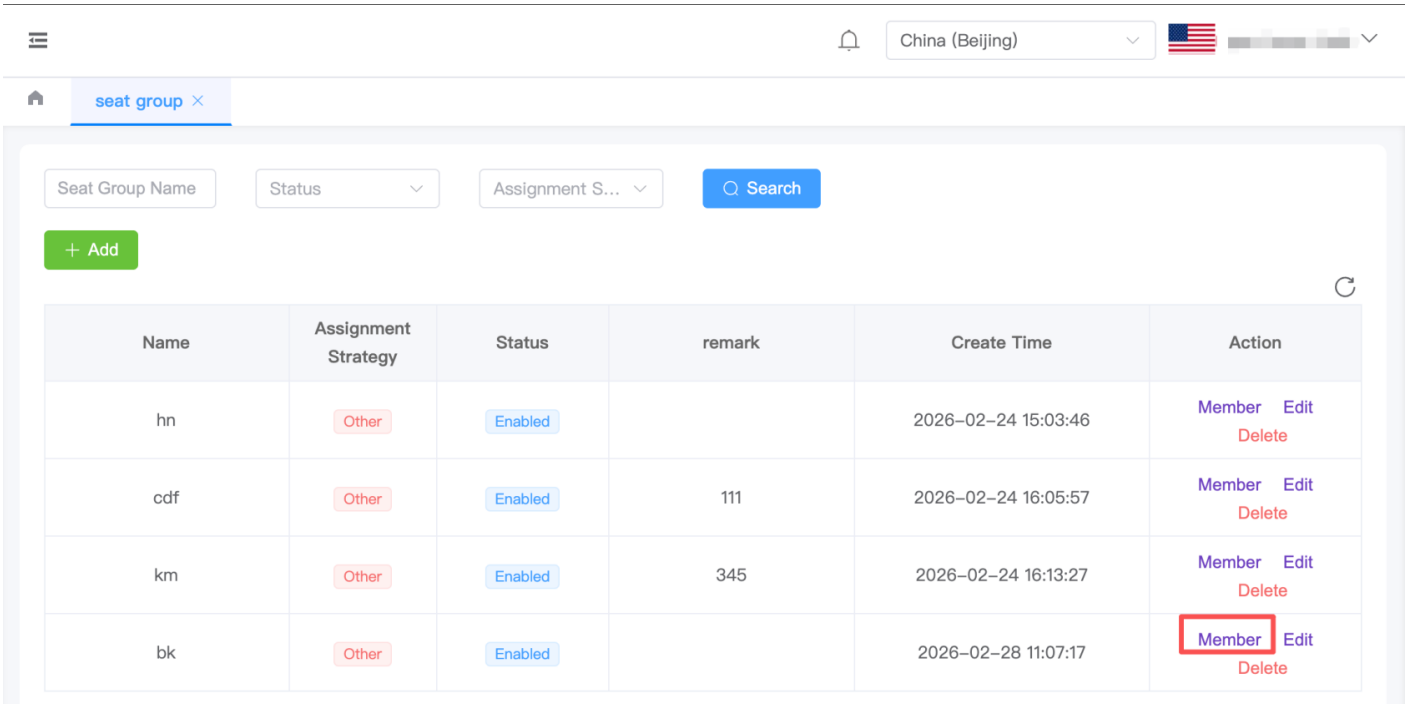




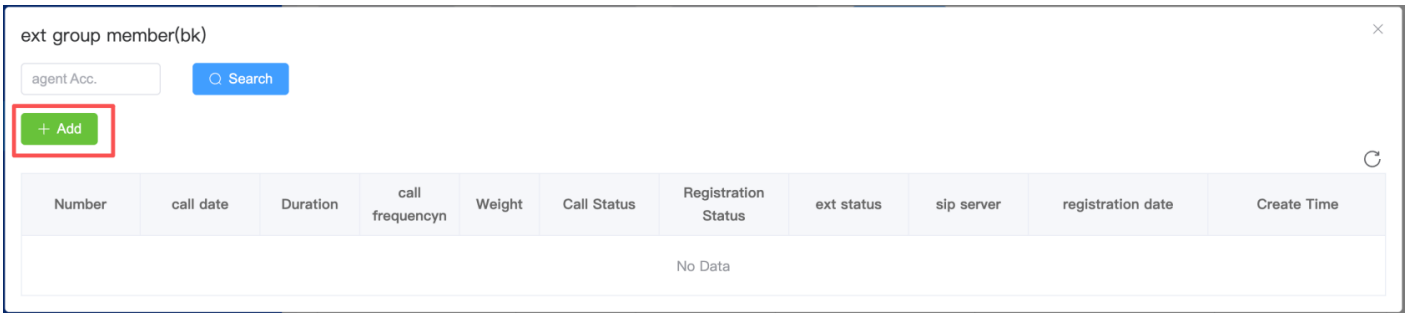
3.In the pop-up window, enter the agent group name and submit to complete the creation.

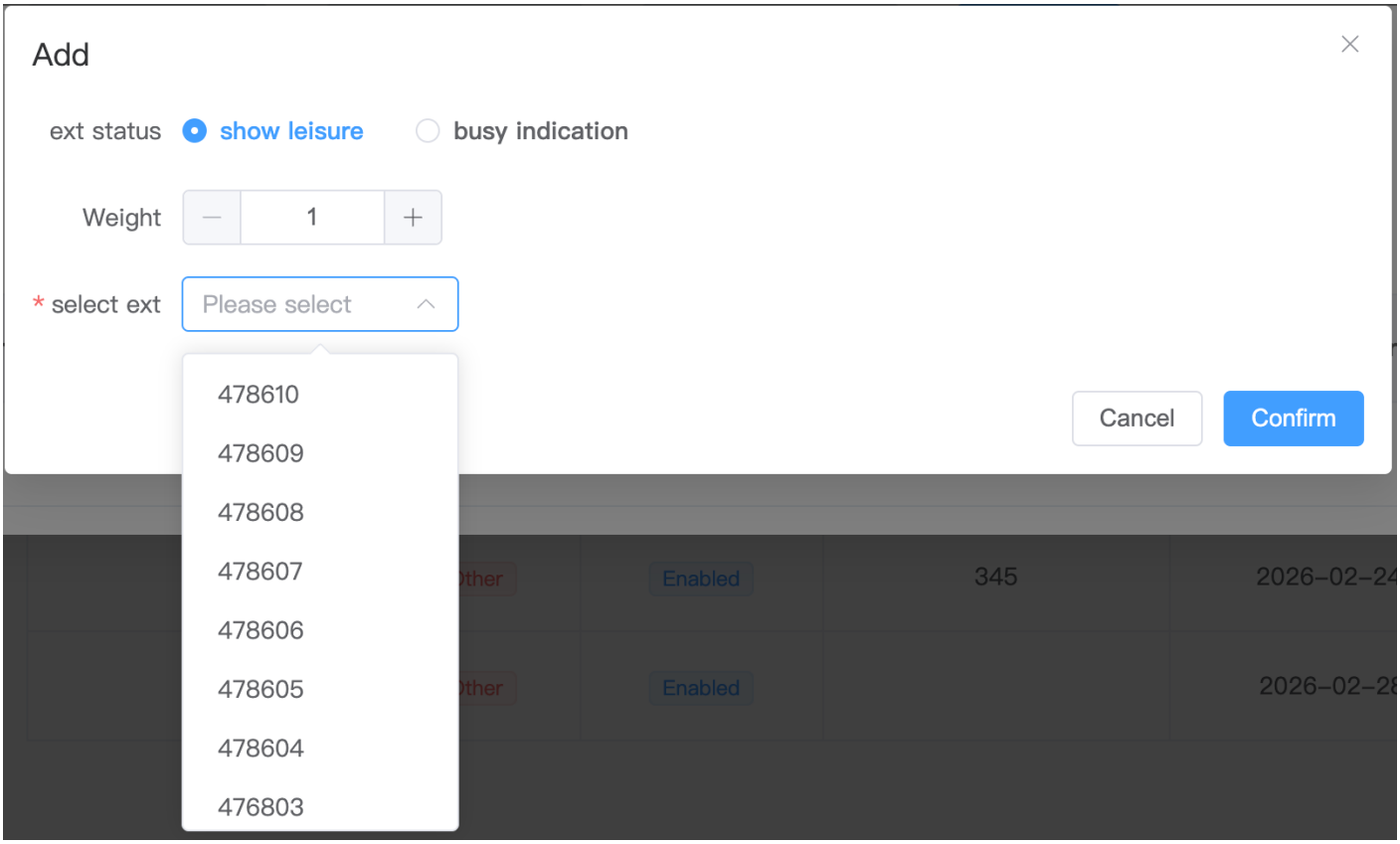


4.After the agent group is created, click **"Member"** in the **"Action"** column on the Agent Groups list page to add extensions to this group.



5.After clicking **"Add"**, a pop-up window will display the list of existing extensions. You can select the desired extensions to add based on your needs.



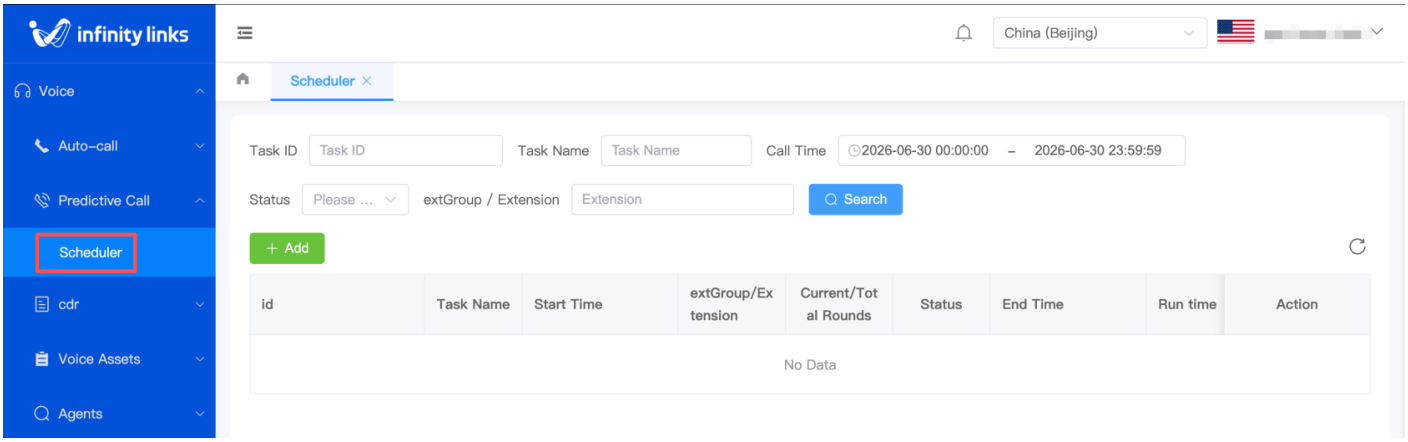


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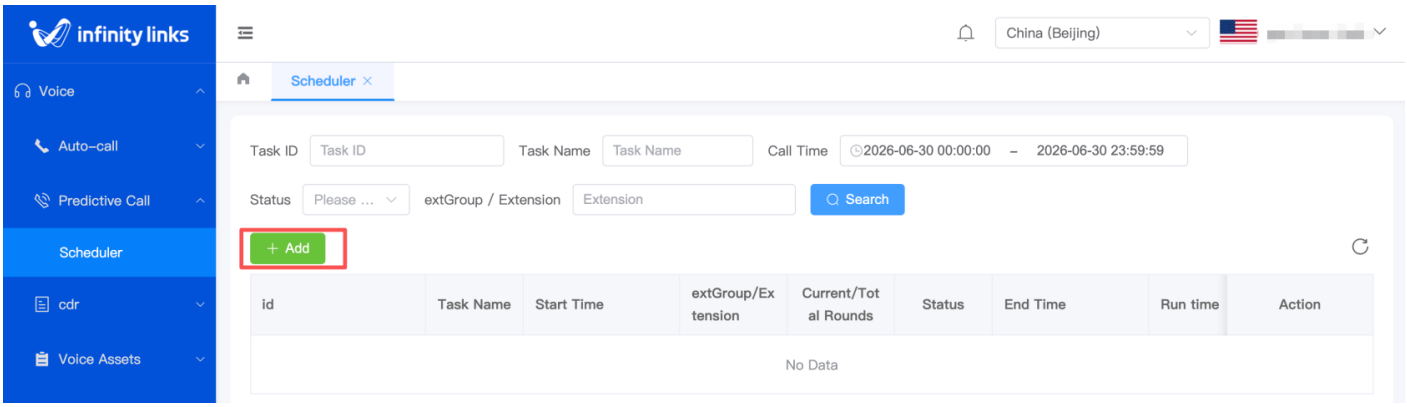
2.Create Task

Feature Access

1.To access the management page, log in to the admin console, select **Voice** from the left-hand navigation menu, then click **Predictive Call** in the expanded submenu, and finally choose **Scheduler**.



2.On the Predictive Outbound Dialing Task Management page, click **Add** to enter the configuration interface. Fill in the required information according to your business needs, then click **Confirm** to complete the creation of a new task.



Add

* Task Name

* call times — 1 +

call retry interval — 3600 + Seconds

Timed Execution (•) Yes ( ) No Note: Time is based on Beijing Time

Scheduled Start Time: Select date and time

Scheduled End Time: Select date and time

* seat call ratio: 1:1

Explanation: The ratio of each seat to the call task. Input format 1:1

Is fixed call ratio (•) Yes ( ) No

Note: If No is selected, the system will calculate dynamically

task concurrent — 100 +

Caller No: Please select

assign typ: extGroup

* extGroup: Please select

* Phone File: Select File Download Template

Notice： No more than 5000 numbers at once

Cancel Confirm

Task Name

Set a recognizable name for this outbound calling task, such as “September Customer Follow-up” or “Product Promotion Campaign,” to help quickly identify and manage it in the task list.

Call Attempts

The maximum number of times the system will attempt to call the same recipient number.

Example: If set to “3,” the system will try calling that number up to 3 times.

Note: This count includes the first call attempt. If the first call is not answered (e.g., busy, no answer, phone off), the system will retry based on the **call retry interval** setting until it either reaches the maximum number of attempts or successfully connects.

Call Retry Interval

The minimum waiting time (in seconds) before the system retries a call to the same number after a failed attempt.

Unit: seconds Example: Setting it to “600 seconds” means the system waits at least 10 minutes before the next attempt.

Note: Actual recall timing may vary slightly due to system scheduling or agent availability.

Timed Execution

Choose “Yes” or “No.”

Yes: The task status automatically changes to “Running.” The system starts dialing at the scheduled start time and stops automatically at the end time.

No: The task status remains “Not Started” after creation. You must manually click the Start button to begin dialing.

Set Call Ratio

A core parameter for predictive dialing, defining how many concurrent calls the system dials per ready agent.

Principle: The system predicts when agents will become available and places calls in advance. For example, a ratio of “1:2” means the system aims to have 2 connected calls ready for every available agent to maximize utilization.

Impact: Too high → Customers may wait too long after answering (“dry wait”), hurting experience. Too low → Agents sit idle, reducing efficiency. Adjust based on your business scenario and customer answer rates.

Is Fixed Call Ratio

(This option usually works together with **“Set Call Ratio”**)

Yes: The system strictly follows the configured **Set Call Ratio**.

No: The system dynamically adjusts the number of concurrent calls based on real-time factors (e.g., historical answer rate, agent status), even if it deviates from the set ratio, to better adapt to changing conditions.

Assign Type

Choose how agent resources are assigned to this outbound task:

Agent Group: Assign the task to one or more skill-based agent groups. All agents within the selected group(s) will share and handle the incoming connected calls.

Extension: Assign the task directly to specific agent extensions. Only the designated agents will receive calls from this task.

If you select Agent Group, you must then choose a specific skill group. All agents in that group will participate in the task and receive calls when available.

If you select Extension, you must enter or select specific agent extension numbers. Only those agents will handle calls for this task.

Caller No

The phone number displayed on the customer’s device when receiving the call. You can select a pool of numbers; the system will rotate or randomly pick from this set during outbound calls to distribute calling load and avoid overusing a single number.

Phone File

Upload a file containing the customer phone numbers and related information for this campaign.

Format: .xlsx

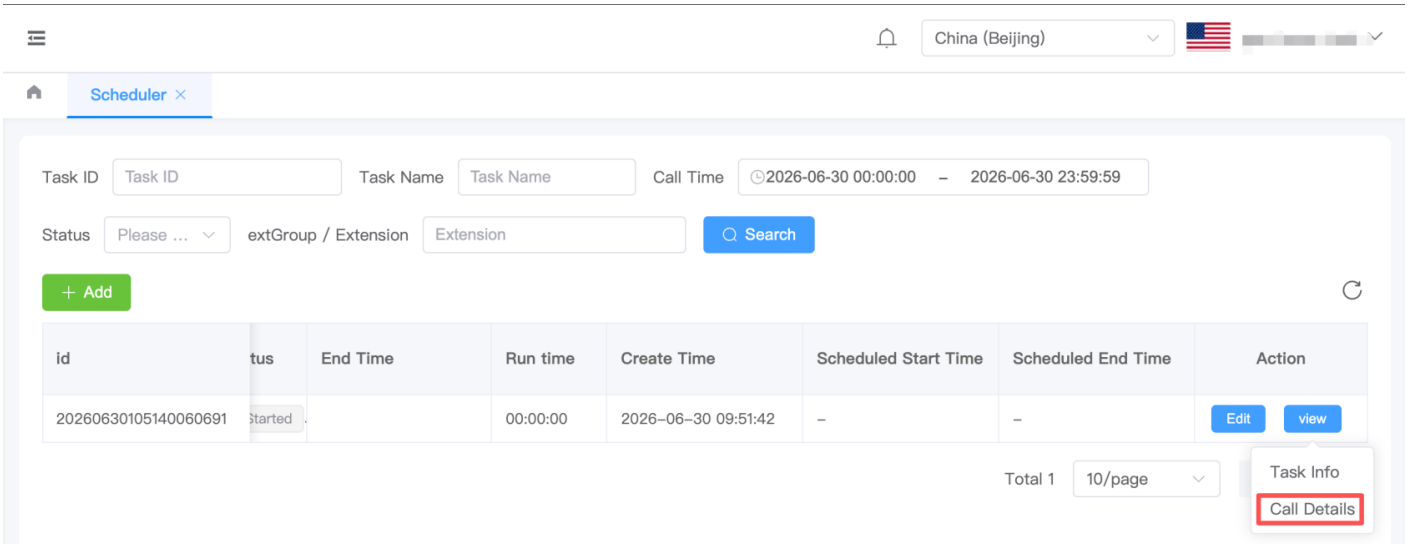
Required Column: At least include a “Recipient Number” column.

Optional Columns: Customer name, custom fields, etc.—used for agent screen pop or reporting purposes.

3.Task Progress Monitoring

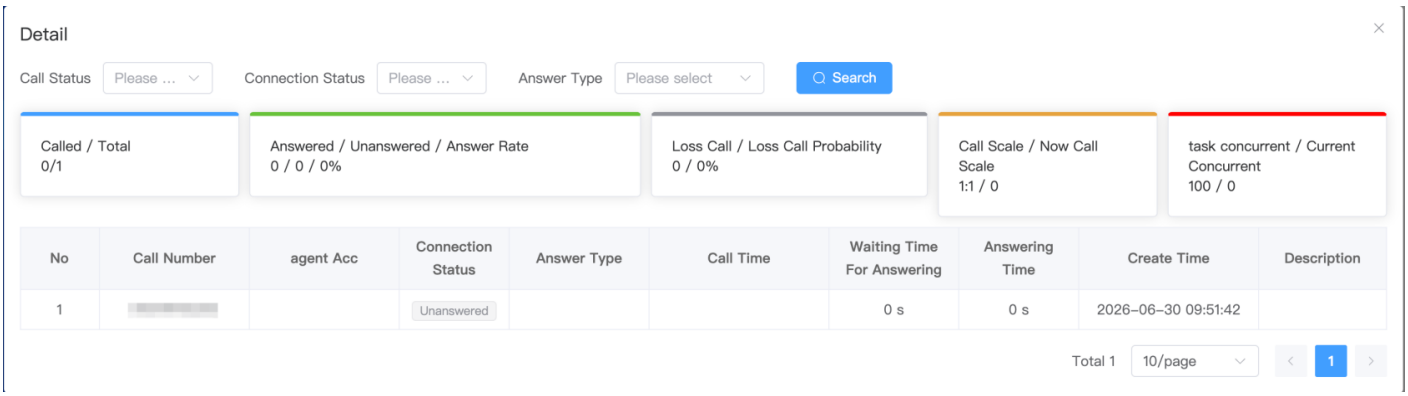
Feature Access

1.Log in to the admin console, select **Voice** from the left-hand navigation menu, then click Predictive Outbound Dialing in the expanded submenu, and choose **Scheduler**. In the task list, click **View > Call Details** in the action column to view the progress of the task.



Task Execution Monitoring

While the task is running, you can refresh the page at any time to get the latest execution status. Through the task progress panel, you can view the following key metrics in real time:



- Called: Number of calls already made / Total number of phone numbers
- Answered: Number of successfully connected calls
- Unanswered: Number of dialed calls that were not answered
- Answer Rate: Number of answered calls / Number of calls dialed