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.

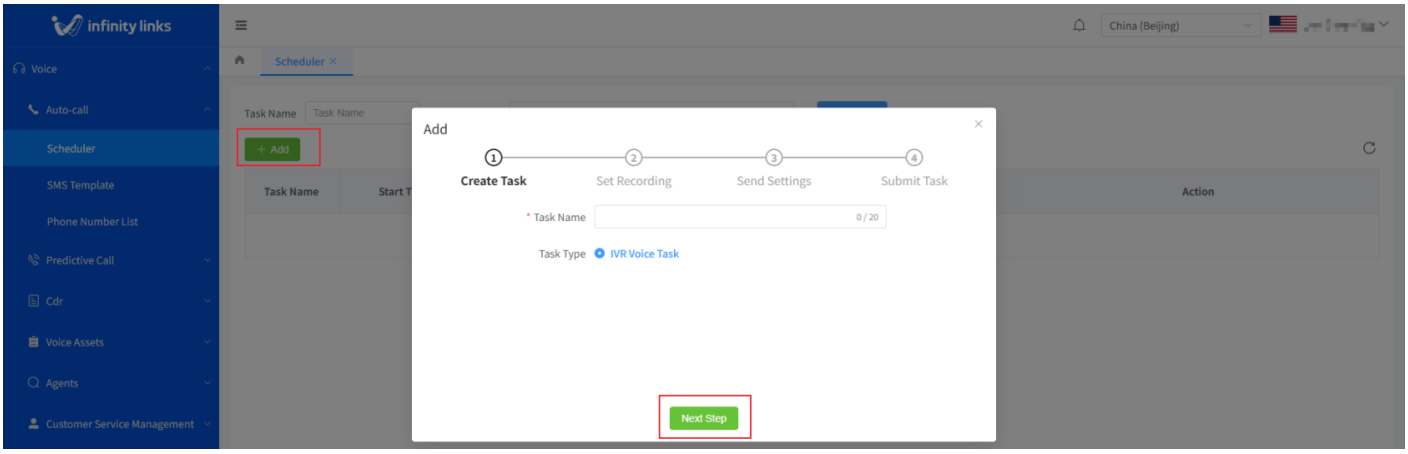
Accessing the Feature

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**.

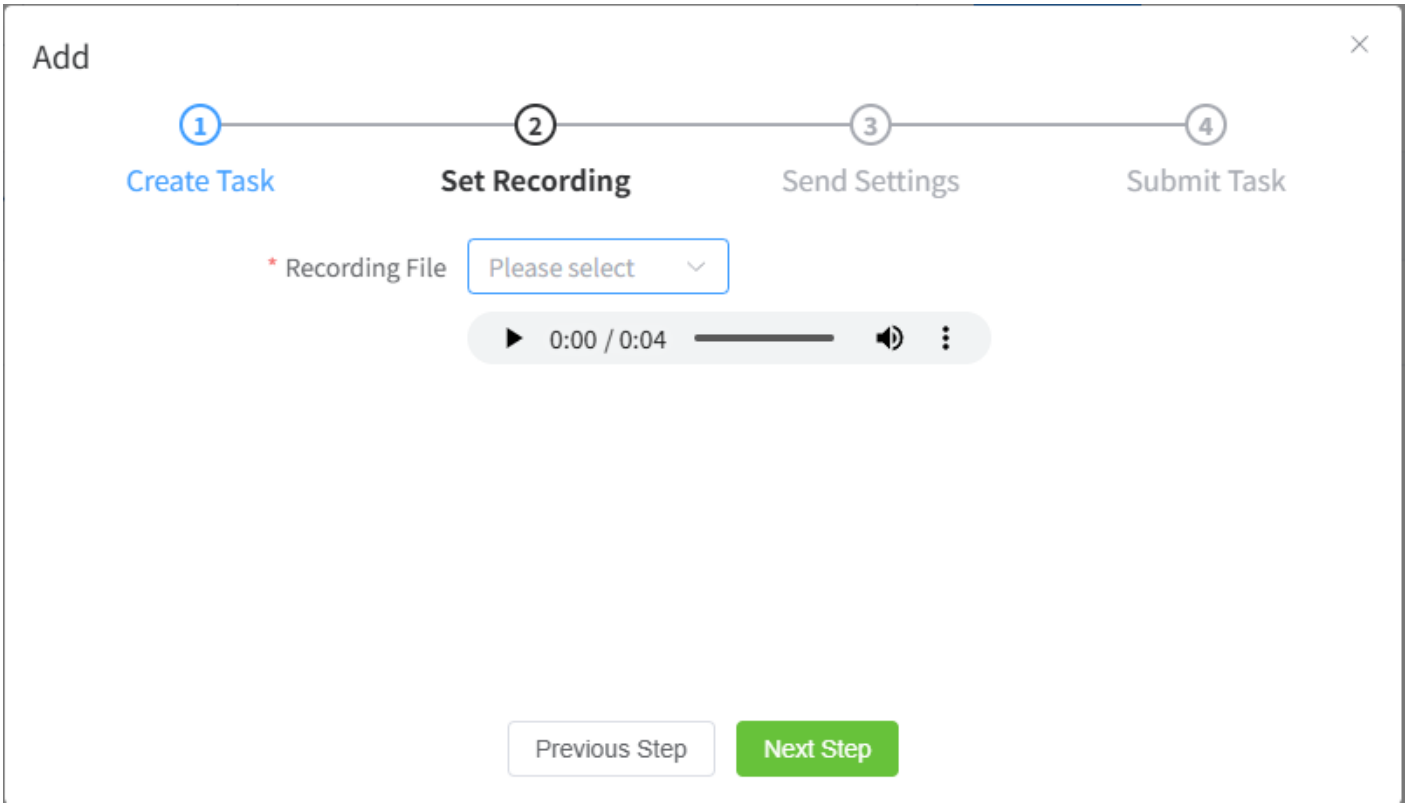


> **Note:** Task names can contain only Chinese characters, English letters, and numbers. Special characters (e.g., **@**, **#**, and **%**) are not allowed.

Step 2: Configure the Recording

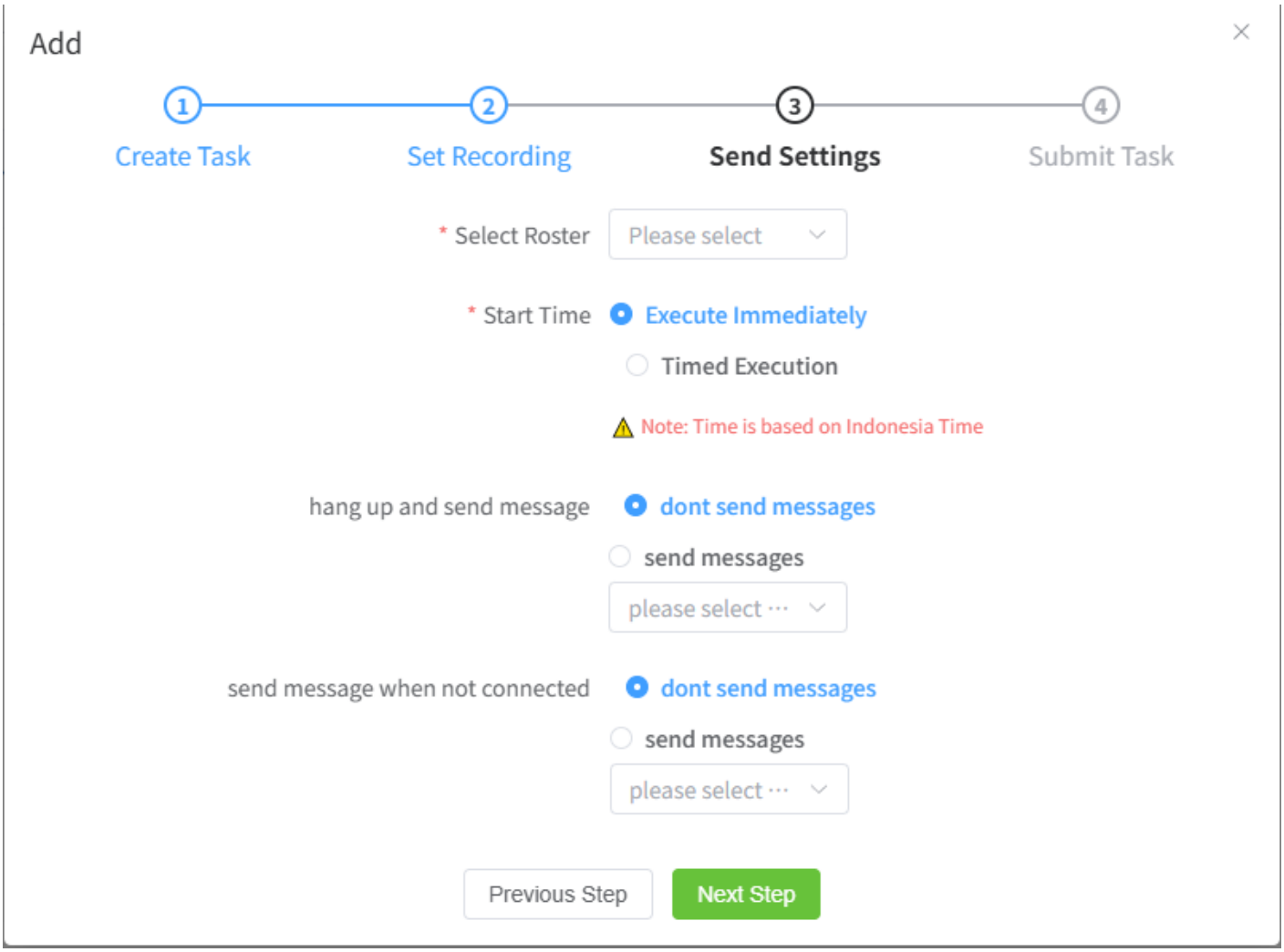
In the **Recording File** drop-down list, select a previously uploaded MP3 file (e.g., **Promotion Campaign - Chinese.mp3**), then click **Next Setp**.

> **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.

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