ICTDialer Agent Panel User Guide

Using predictive mode, dispositions, history, redial, and manual dialing

Purpose: Explain the normal workflow for an ICTDialer web agent, from becoming ready for predictive calls through updating contact outcomes and placing manual calls.
Intended audience: Contact-center agents and supervisors who support agent operations.

Before You Log In

- Use a supported, up-to-date web browser and a stable network connection.
- Connect a working headset and verify microphone and speaker operation.
- Allow the browser to access the microphone when prompted.
- Keep your agent number and password secure.

1. Select Predictive Dialing Mode

After signing in, select Predictive from the dialing-mode control. In predictive mode, ICTDialer automatically places campaign calls and delivers answered calls to available agents.

2. Set Your Status to Ready

Set the agent status to Ready when you are prepared to receive calls. Remain available at your workstation because an answered campaign call may be connected immediately.

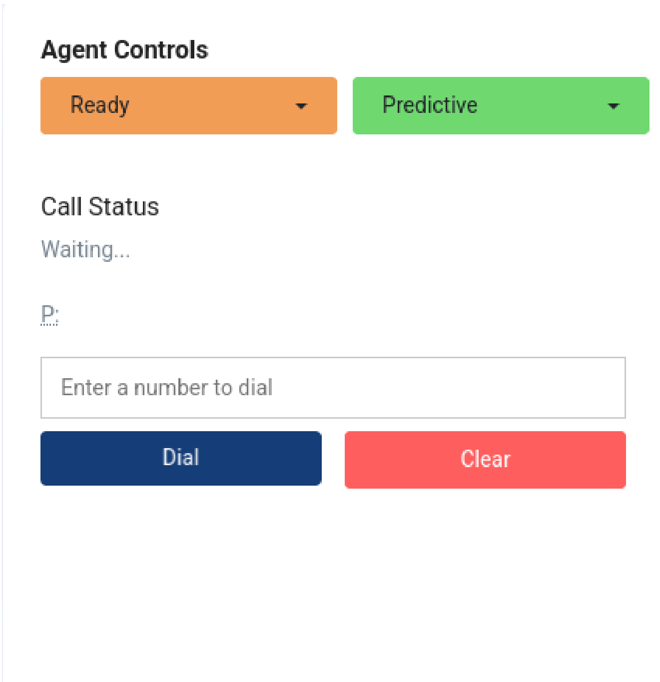

Figure 1. Agent controls showing Ready status and Predictive dialing mode.

Availability: Change your status before taking a break or leaving the workstation so the system does not route a customer call to an unavailable agent.

3. Handle the Connected Call

When a campaign call is answered and assigned to you, the agent panel displays the live call status and the available contact information. Follow the approved campaign script, listen carefully, and use the call controls only as required.

- Confirm the customer or contact identity according to the campaign process.
- Use the displayed script and contact details to guide the conversation.
- Use attended or blind transfer only when the campaign workflow requires it.
- End the call using the agent-panel control when the conversation is complete.

4. Update the Contact and Select a Disposition

After the call ends, record an accurate disposition based on the conversation. Consistent dispositions are essential for follow-up, campaign reporting, and performance analysis.

1. Review or update the contact's first name, last name, phone number, and email address when required.
2. Select the appropriate disposition, such as Interested, Not Interested, Sale Done, Invalid Number, or another campaign-specific option.
3. Enter concise, factual comments that will help the next agent or follow-up team.
4. Schedule or reschedule the contact when a callback is required.
5. Select Save before moving to the next interaction.

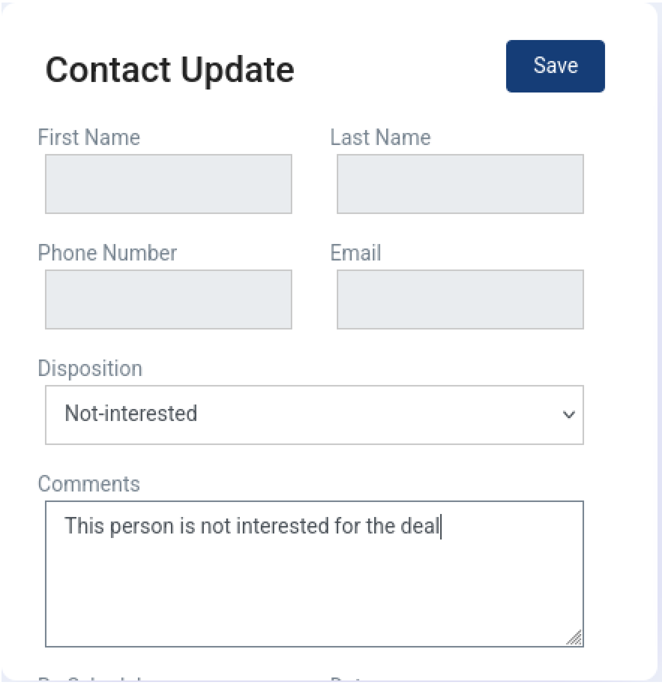

Figure 2. Contact Update panel with contact details, disposition, and comments.

5. Use Agent History and Redial

The Agent History section displays recently completed calls. Use it to review previous interactions, update contact information, or redial a contact when permitted by the campaign process.

1. Open Agent History.
2. Locate the required completed call.
3. Select the phone icon to redial the contact.
4. Update the contact record or disposition when additional information is obtained.

6. Place a Manual Call

Use Manual mode when you need to dial a specific number rather than receive calls from a predictive campaign.

1. Change the dialing mode from Predictive to Manual.
2. Enter the destination number in the built-in web phone.
3. Select Dial to initiate the call.
4. Complete the call and update the contact record or disposition where applicable.
5. Return to Predictive mode and Ready status when you are prepared to resume campaign calls.

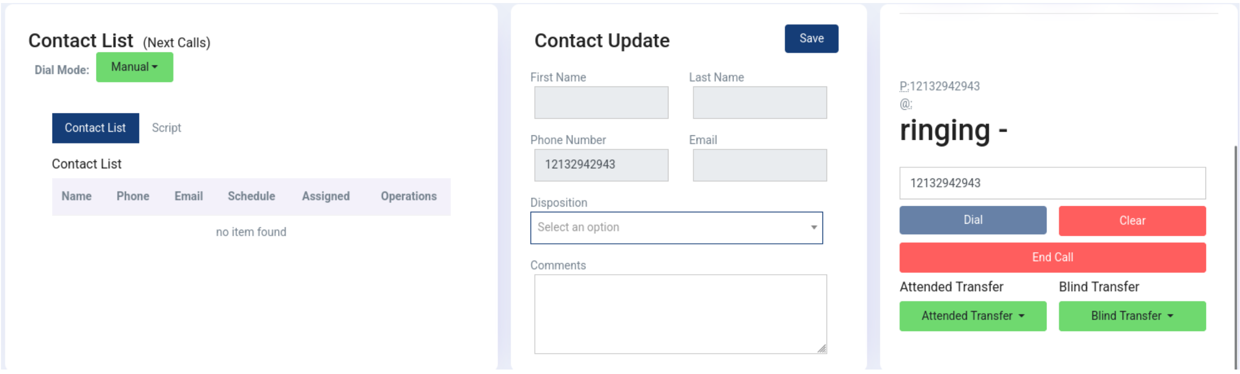

Figure 3. Agent panel in Manual mode with contact, phone, and transfer controls.

End-of-Shift Checklist

- Complete and save all pending dispositions and comments.
- Confirm that no call is active or waiting for an update.
- Change your status out of Ready according to your organization's process.
- Log out of the ICTDialer agent panel.