

# Configuring an Agent Predictive Dialing Campaign

*A step-by-step ICTDialer administration guide*

**Purpose:** Explain how to create a web-agent extension and configure an outbound predictive dialing campaign that connects answered calls to available agents.

**Intended audience:** ICTDialer administrators, campaign managers, and authorized users.

## Before You Begin

- Confirm that the outbound SIP trunk and permitted caller ID are configured and tested.
- Create or prepare the contact/lead group that the campaign will dial.
- Confirm that the required agents, external call-center destination, or skill group is available.
- Prepare a dialog/script and an audio message if the campaign will use AMD with the Leave Message action.
- Verify that your account has permission to manage extensions and campaigns.

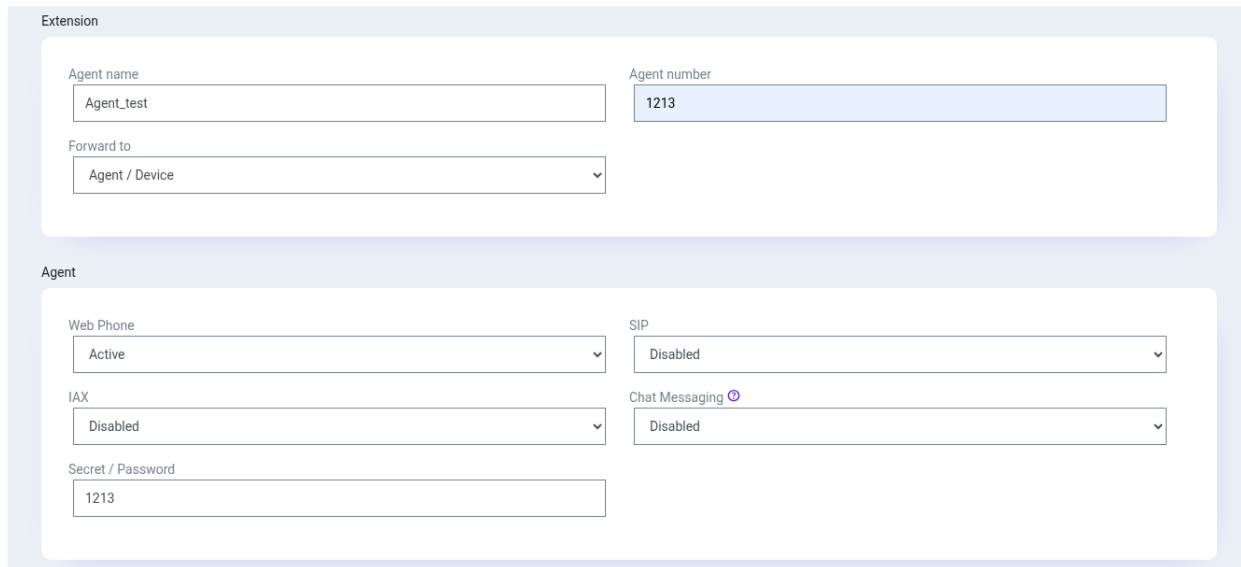
## 1. Create a Web-Agent Extension

ICTDialer's Web Agent allows an agent to work directly from a supported browser using the built-in WebRTC phone. No separate desktop softphone is required for normal web-agent operation.

**Navigation path:** Administration > Agent/Extension > New Extension

1. Sign in to ICTDialer with an administrator or authorized user account.
2. Open Administration and select Agent/Extension.
3. Select New Extension in the upper-right corner.
4. Enter the required agent and extension information.
5. Select Save to create the extension.

| Field           | Description                                                                                                                                           |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| Agent Name      | Enter a recognizable name for the agent.                                                                                                              |
| Agent Number    | Enter the extension or login identifier that the agent will use.                                                                                      |
| Forward To      | Select Agent/Device for a browser-based Web Agent. Select External Call Center or Skill Group only when your deployment requires that routing method. |
| Web Phone       | Set the web phone to Active for a browser-based agent.                                                                                                |
| Secret/Password | Enter a secure login secret for the extension. Share it only with the authorized agent.                                                               |



The form is titled 'Agent/Extension form' and is used to create a browser-based web agent. It is divided into two main sections: 'Extension' and 'Agent'.

**Extension Section:**

- Agent name:** Text input field containing 'Agent\_test'.
- Agent number:** Text input field containing '1213'.
- Forward to:** Dropdown menu with 'Agent / Device' selected.

**Agent Section:**

- Web Phone:** Dropdown menu with 'Active' selected.
- SIP:** Dropdown menu with 'Disabled' selected.
- IAX:** Dropdown menu with 'Disabled' selected.
- Chat Messaging:** Dropdown menu with 'Disabled' selected.
- Secret / Password:** Text input field containing '1213'.

Figure 1. Agent/Extension form used to create a browser-based web agent.

## 2. Open the Agent Campaign Form

**Navigation path:** Contact Center > Campaign Management > Add New > Agent Campaign

1. Open Contact Center and select Campaign Management.
2. Review the campaign list, where existing campaigns can be edited, monitored, started, stopped, or paused.
3. Select Add New.
4. Choose Agent Campaign to open the campaign configuration form.

## 3. Configure the Basic Campaign Settings

| Field                      | Description                                                                                                                                                    |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Campaign Name</b>       | Enter a clear and unique name that identifies the campaign.                                                                                                    |
| <b>Dialing Mode</b>        | Select Predictive Dialing. ICTDialer will pace multiple outbound attempts and connect answered calls to available agents.                                      |
| <b>Caller ID Type</b>      | Select Custom, User Caller ID, or Anonymous Caller ID according to your SIP provider and business requirements.                                                |
| <b>Custom Caller ID</b>    | Enter a caller ID permitted by your SIP provider. If a fixed caller ID is already enforced on the trunk, the campaign can normally use that trunk-level value. |
| <b>User Caller ID</b>      | Use the configured user telephone number as the outbound caller ID.                                                                                            |
| <b>Anonymous Caller ID</b> | Hide the caller identity where supported and legally permitted.                                                                                                |

**Caller ID requirement:** Use only caller IDs that are authorized by your SIP provider and permitted by applicable telecommunications regulations.

The screenshot displays the 'Basic Configuration' tab of the ICTDialer interface. It is divided into two main sections: 'General Configuration' and 'Basic Configuration'. In the 'General Configuration' section, the 'Campaign Name' is set to 'TeleSales' and the 'Dialing Mode' is set to 'Predictive Dialing'. The 'Basic Configuration' section contains several fields: 'Caller ID Type' is set to '[custom]', 'Caller ID' is '12132942945', 'Caller Name' is 'Fax toy', 'Start Campaign' is set to 'Immediately', and 'Stop Campaign' is set to 'On Completion'. At the top right of the interface, there are three buttons: 'Save', 'Reset', and 'Cancel'.

Figure 2. Basic campaign configuration, including dialing mode and caller ID settings.

## 4. Configure the Campaign Schedule

ICTDialer can start the campaign immediately or at a scheduled date and time. The campaign can stop automatically after all contacts are processed or at a specified time.

| Field                                     | Description                                                                   |
|-------------------------------------------|-------------------------------------------------------------------------------|
| <b>Start Campaign - Immediately</b>       | Begin dialing as soon as the campaign is saved and activated.                 |
| <b>Start Campaign - On Scheduled Time</b> | Begin dialing on the selected date, time, and permitted weekdays.             |
| <b>Stop/Pause - When Done</b>             | Stop the campaign when all eligible contacts and retries have been processed. |
| <b>Stop/Pause - On Scheduled Time</b>     | Pause or stop the campaign at the specified date and time.                    |

The screenshot displays the 'Campaign Schedule' tab of the ICTDialer interface. It shows the 'Start Campaign' set to 'On Scheduled Weekday & Time'. Below this, the 'At' field is set to '08' and '10'. The 'Stop Campaign' is set to 'On Completion'. The 'Weekdays' section shows checkboxes for Sunday (unchecked), Monday (checked), Tuesday (checked), Wednesday (checked), Thursday (checked), Friday (checked), and Saturday (unchecked).

Figure 3. Campaign scheduling options for start time, weekdays, and completion behavior.

## 5. Configure Agent Campaign Controls

| Field                         | Description                                                                                                                                   |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Action on AMD - Disabled      | Do not classify whether an answered call was picked up by a person or an answering machine.                                                   |
| Action on AMD - Hangup        | When AMD identifies an answering machine, end the call instead of transferring it to an agent.                                                |
| Action on AMD - Leave Message | When AMD identifies voicemail or an answering machine, play the selected pre-recorded message.                                                |
| Dialog/Script                 | Select the script displayed to the agent. The script may contain custom tokens that are replaced with contact information.                    |
| Acceptable Abandonment Ratio  | Select the maximum target abandonment ratio. ICTDialer uses this value when adjusting predictive pacing.                                      |
| Agent/Operator Extension      | Select individual agents or an existing skill group. When a skill group is selected, its configured ring strategy and wrap-up settings apply. |
| Maximum Concurrent Channels   | Set the maximum number of simultaneous outbound call channels available to this campaign.                                                     |
| Maximum Retries               | Set how many additional attempts ICTDialer may make when the initial call is not completed.                                                   |
| Suggested Dialing Order       | Select the retry order required for the campaign. Use Repeat Primary when the primary number should be attempted again before alternatives.   |

**Pacing guidance:** Begin with a conservative concurrent-channel limit and abandonment target. Increase pacing gradually while monitoring available agents, answer rate, queue wait time, and abandonment.

The screenshot displays the 'Agent Campaign Configuration' interface. It is divided into two main sections: 'Agent Campaign Configuration' and 'Agent Campaign Retry'.

**Agent Campaign Configuration:**

- Action on AMD:** A dropdown menu with 'Leave Message' selected.
- TESTING:** A dropdown menu with 'TESTING' selected.
- Acceptable Abandonment Ratio:** A dropdown menu with '3% (Default)' selected.
- Dialogue / Script:** A dropdown menu.
- Agent / Operator Extension:** A dropdown menu with 'Access BUCKET 1 - Collections (Skill Group: 103)' selected.

**Agent Campaign Retry:**

- Max. Concurrent Channels:** A text input field with the value '20'.
- Max. Retries:** A dropdown menu with '1' selected.
- Suggested dialing order:** A dropdown menu with 'Repeat primary' selected.

Figure 4. Agent campaign controls for AMD, agents, abandonment, channels, and retries.

## 6. Select the Campaign Contacts

| Field                       | Description                                                                                                                                                    |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Source</b>               | Select Contact or Lead according to the record type used by the campaign.                                                                                      |
| <b>Contact Type</b>         | Select Group to use an existing contact/lead group, or choose the available file-upload option when importing directly from the campaign form.                 |
| <b>Contact Group</b>        | Select one or more groups. When multiple groups are selected, set their priorities to control the order or frequency in which they are dialed.                 |
| <b>Contact List Closure</b> | Select the required behavior when the list is exhausted. Choose Conclude Campaign when the campaign should finish after all contacts and retries are complete. |

Figure 5. Contact source, contact groups, priorities, and list-closure settings.

## 7. Save, Start, and Monitor the Campaign

1. Review all configuration fields, especially caller ID, schedule, assigned agents, channel limit, retries, and selected contact groups.
2. Select Save to create the campaign.
3. Start the campaign immediately or allow the configured schedule to activate it.
4. Confirm that assigned agents are logged in, using Predictive mode, and set to Ready.
5. Monitor Live Statistics, CDR, Agent Statistics, and Disposition reports while the campaign is running.

**Compliance:** Configure calling hours, consent rules, do-not-call controls, recording, and abandonment limits in accordance with the laws and provider policies that apply to your campaign.