

Outbound Call Center Guide

Yeastar P-Series Software Edition

Version: v1

Date: 2025-10-27



Contents

Outbound Call Center Overview.....	1
Administrator Guide.....	4
Overview.....	4
Outbound Queue Management.....	8
Create an Outbound Queue.....	8
Set up Skill-based Routing for an Outbound Queue.....	14
Agent Management.....	18
Outbound Campaign Management.....	24
Create an Outbound Campaign.....	24
View Outbound Campaign Details.....	42
Import Campaign Contacts to a Phonebook.....	46
Export Call Log Data for Outbound Campaign.....	47
Export Do Not Call Data for Outbound Campaign.....	48
Manage Outbound Campaigns.....	49
Do Not Call Management.....	51
Add a DNC List.....	51
Delete DNC Lists.....	56
Export and Import a DNC List.....	58
Attempt Controls.....	60
Configure an Attempt Control Rule.....	60
Supervisor Guide.....	64
Overview.....	64
View Outbound Campaign Details on Wallboard.....	64
Agent Guide.....	70
Overview.....	70
Agent Operations on Web Client / Desktop Client.....	71
Access Inbox.....	71
Handle Campaign Calls on Inbox.....	73
Manage Agent Status.....	75
Manage Outbound Queue Call Logs.....	84

Agent Operations on Mobile Client.....	86
Handle Campaign Calls on Linkus Mobile Client.....	86
Agent Status Management.....	92
Manage Outbound Queue Call Logs.....	103

Outbound Call Center Overview

Yeastar P-Series Software Edition provides Outbound Call Center for businesses to proactively reach out to customers through voice calls. Businesses can efficiently launch targeted outbound campaigns that automatically dial customer numbers and connect the calls to either outbound queue agents, IVRs or voice prompts for promotions, sales, follow-ups, and reminders.



Requirements



- The firmware of Yeastar P-Series Software Edition is 83.18.0.59 or later.
- Ensure that your PBX system meets the following requirements to guarantee uninterrupted call activities.



Note:

If necessary, expand server resources and contact your service provider for license update.

Item	Description
Concurrent call capacity	<p>The system supports sufficient concurrent calls for the following call activities:</p> <ul style="list-style-type: none">◦ Basic communication: Handles daily inbound calls, outbound calls, and internal calls.◦ Outbound Call Center: Exclusively handles outbound calls in campaigns. <div>Note: It is recommended to reserve 50% of the total concurrent call capacity for daily operations. For the Outbound Call Center, you can adjust the ratio and allocate concurrent call capacity when creating outbound campaigns based on your needs and call volume.</div>
Server resource	<p>The server resource can support the required volume of concurrent calls.</p> <div>Note: For detailed information about the server requirement based on concurrent call capacity, see System and Server Requirements.</div>
Software licensing	<p>The license includes a subscription to the Outbound Call Center add-on service.</p>

Item	Description
	<div>  Note: Yeastar provides a 30-day free trial for the service (Path: Plan > Add-on Subscription), which includes 5 concurrent calls. You can try out the service before subscribing. </div> <div> <div>Plan / Add-on Subscription</div> <div>  <div> Outbound Call Center Maximize your proactive outreach to prospects and customers by running outbound call campaigns. Enable dialing automation with auto dialer, improve connect rates, and create more revenue opportunities. </div> <div> Enable 30-day Free Trial </div> </div> </div>

Highlights

Yeastar Outbound Call Center service provides the following highlights:

Easy Campaign Settings & Management

The outbound call center includes features like custom outbound caller ID (DOD), prospects importing, and outbound queues, enabling system administrators to easily create, schedule, and monitor outbound call campaigns in real time, streamlining campaign setup and management.

3-in-1 Auto Dialers

The outbound call center service supports 3-in-1 auto dialers, which automatically dials phone number from a pre-defined contact list and directs answered calls to available agents. This feature automates the dialing process, optimizing call flow and increasing efficiency by reducing manual dialling time.

Performance-tracking Campaign Wallboard

The Campaign Wallboard offers real-time performance metrics and detailed dialing logs to improve oversight and track campaign progress effectively.

Agent-based Campaign Call Inbox

For agents, a centralized Campaign Call Inbox simplifies operations by consolidating assigned call list, contact details, call dispositions, callback schedules, and DNC management into one convenient location.

Operational guidances

Users can access the outbound call center and perform different tasks based on their assigned roles. The following table provides operational guidance tailored to each role's responsibilities.

Role	Description
System Administrator	<p>System administrators are responsible for setting up outbound queues, configuring queue options (such as call distribution, announcements, queue overflow, etc.), assigning queue managers and agents to queues, and setting up outbound call campaigns.</p> <p>For more information, see Outbound Call Center Administrator Guide.</p>
Supervisor	<p>Users with the Queue Manager role assigned by the system administrator are able to monitor the outbound call campaigns performance and manage outbound queue agent status.</p> <p>For more information, see Outbound Call Center Supervisor Guide.</p>
Agents	<p>Users with Agent role assigned by the system administrator are responsible for handling outbound campaign call interactions.</p> <p>For more information, see Outbound Call Center Agent Guide.</p>

Administrator Guide

Outbound Call Center Administrator Guide

This topic describes the key concepts of outbound call center, and provides step-to-step instructions on how to set up and configure an outbound call center.

Audience

This guide is intended for system administrators responsible for establishing, configuring, and maintaining an outbound call center.

Key concepts of Outbound Call Center

Learn about the key concepts to gain a better understanding of Yeastar Outbound Call Center.

Concept	Description
Outbound Campaign	<p>Outbound Campaign refers to a targeted outbound calling task, typically focused on a specific objective or customer segment. It includes settings for dialing rules, time schedules, queue assignment, etc.</p> <p>Yeastar outbound call center supports the following types of outbound campaigns:</p> <ul style="list-style-type: none">• Agent-based Outbound Campaign: This type involves real-time interaction between outbound queue agents and contacts. It is commonly used for campaigns that require personalized communication, such as product promotion, sales, or surveys.• Agentless Outbound Campaign: This type typically connect the contacts to IVR systems or play pre-recorded voice prompts. It is commonly used for automated outreach, such as reminder notifications, appointment confirmations, or alerts.
Auto Dialer	<p>Auto Dialer is an automated tool that dials a list of phone numbers based on predefined rules. Once a call is connected, it transfers the call to a pre-defined destination.</p> <p>Yeastar outbound call center supports the following auto dialing methods:</p> <ul style="list-style-type: none">• Progressive Dialer: This mode waits for an agent to finish the current call before dialing the next number, and only dials one number per available agent, ensuring that an agent is available to handle the call interaction as soon as the customer answers the call.

Concept	Description
	<ul style="list-style-type: none"> • Power Dialer: This mode dials multiple numbers simultaneously for each available agent based on a specified dial rate, without waiting for an agent to finish the previous call, aiming to maximize agent productivity by keeping them on calls without delay. • Agentless Dialer: This mode automatically dials contact numbers and connect the contacts to an IVR system or plays a pre-recorded voice prompt, eliminating the need for agent interaction.
Contact List	Contact List is a collection of phone numbers and customer details used for outbound calling. It typically includes contact information such as phone numbers, names, and companies. Contact lists are often categorized for different campaigns and imported into the system for use by auto dialers or agents.
DNC List	Do Not Call (DNC) List is a collection of phone numbers that should never be dialed in outbound campaigns. It typically includes contact information such as phone numbers, names, and companies.
Local presence DOD	Yeastar outbound call center allows you to customize outbound caller ID for outbound campaign calls, so as to display a local phone number matching the customer's area code, increasing the answer rate, as customers tend to trust familiar local numbers.
Outbound Queue	An Outbound Queue provides a group of agents responsible for handling outbound campaign calls. It organizes and prioritizes calls, distributing them to available agents based on predefined rules and priorities.
Outbound Call Center Panel	<p>Yeastar Provides the following intuitive panels for outbound queue managers and agents to manage outbound campaigns and handle campaign calls:</p> <ul style="list-style-type: none"> • Campaign Wallboard: Allows outbound queue managers to view real-time campaign details and campaign metrics, and manage outbound queue agents status. • Inbox: Allows outbound queue agents to view customer information and handle campaign calls.

Steps to set up Outbound Call Center tasks

Follow the steps below to set up your outbound call center task.

1. Prepare call destinations based on campaign type

Prepare the destination to which you want the contacts to be connected when they answer the call.

Campaign Type	Destination
Agent-based Outbound Campaign	To connect the contact to queue agent, you need to create an outbound queue, define the call distribution rules and assign a group of agents to handle campaign calls.

Campaign Type	Destination
	<ul style="list-style-type: none"> • To create a basic outbound queue, see Create an Outbound Queue. • To set up a queue with skill-based call routing, see Set up Skill-based Routing for an Outbound Queue.
Agentless Outbound Campaign	<ul style="list-style-type: none"> • To connect the contact to an IVR for automated call interaction, you need to set up an IVR and customize the IVR menu, For more infoermentation, see set up an IVR. • To deliver contacts desired messages by playing a voice prompt, You need to prepare the relevant prompts. For more information, see record a custom prompt or upload a custom prompt.

2. Prepare contact list

Prepare a list of contact for the campaign to dial. You can associate a contact list with an outbound campaign in either of the following methods:

Method	Description
Phonebook	Group the target contacts into a PBX phonebook , which can be directly selected when setting up an outbound campaign.
File importing	<p>Prepare a CSV file containing the contacts' information, which can be imported when setting up an outbound campaign. To use this method, make sure the file meets the following requirements.</p> <ul style="list-style-type: none"> • Format: UTF-8 .CSV • Size: Less than 300 MB • File name: Less than 127 characters • Import parameters: Ensure that the import parameters meet requirements. For more information, see Company Contacts Parameters.

3. Prepare DNC list

In case of need, prepare a list of contacts to restrict the campaign from dialing. You can create a DNC list using any one of the following methods:

Method	Description
Phonebook	Group the target contacts into a PBX-native phonebook or synchronize from third-party system, which can be directly selected when creating a DNC list.
File importing	Prepare a CSV file containing the contacts' information, which can be imported when creating a DNC list. To use this method, make sure the file meets the following requirements.

Method	Description
	<ul style="list-style-type: none"> • Format: UTF-8 .CSV • Size: Less than 300 MB • File name: Less than 127 characters • Import parameters: Ensure that the import parameters meet requirements. <p>For more information, see Company Contacts Parameters.</p>
Manual entry	Manually add DNC contacts one by one via manual entry.

4. Set up call routing

Set up trunks and outbound routes to ensure that the campaign calls can be successfully sent out.

- **Trunk:** Configure the trunks through which outbound calls will be sent out. For more information, see [Trunk Overview](#).
- **Outbound Route:** Define the correct outbound routes to properly route the calls based on campaign requirements. For more information, see [Set up an Outbound Route](#).

5. Configure caller ID (DOD)

To establish local presence for a higher answer rate, you can customize outbound caller IDs based on trunk through which the outbound campaign calls will be sent.

For more information, see [Customize Outbound Caller IDs for Outbound Campaigns](#).

6. Define call disposition codes

Define disposition code for call outcomes with custom labels and brief descriptions, which can be used by outbound queue agents to mark and categorize campaign calls effectively.

For more information, see [Add disposition codes](#).

7. Create an outbound campaign

Create an outbound campaign, including setting up call rule and schedule, assigning call handling destination based on campaign type, and associated the contact list.

- To create an outbound campaign with real-time interaction handled by outbound queue agents, see [Create an Agent-based Campaign](#).
- To create an outbound campaign that connects contacts to an IVR system or voice prompt, see [Create an Agentless Campaign](#).

Outbound Queue Management

Create an Outbound Queue

This topic describes how to create an outbound queue, where a group of agents will handle the campaign calls and interact with the contacts.

Requirements

- **Firmware:** Version 83.18.0.59 or later
- **Subscription:** **Outbound Call Center** add-on service

Limitations

Maximum Number of Extensions (N)	$N \leq 500$	$N > 500$
Number of outbound queues	32	128


Prerequisites

Before you begin, prepare the following voice prompts and music for the outbound queue as needed, and upload them to the system.

- Prepare and [upload](#) the following voice prompts for the queue to provide different information (Path: **PBX Settings > Voice Prompt > Custom Prompt**):
 - **Join Announcement:** The prompt played to the contacts when they answer the campaign call and join the queue.
 - **Periodic Announcement:** The prompt played periodically to contacts after they reach the queue and before agents answer the calls. Following the prompt, callers can press the key to respond.
- Prepare and [upload Music on Hold](#) for the queue (Path: **PBX Settings > Voice Prompt > Music on Hold**), which is played to the contacts when their calls are put on hold by agents.

Procedure



1. Log in to PBX web portal, go to **Call Features > Queue > Outbound Queue**.
2. Click **Add**.
3. In the **Basic** tab, configure the following settings.
 - a. In the **Basic** section, configure the basic settings for the queue.

Setting	Description
Number	<p>Enter a virtual number to access the queue.</p> <div>  Note: <ul style="list-style-type: none"> • If the total of PBX extensions is less than or equal to 6000, the default queue number range is from 6400 to 6499. • If the total of PBX extensions is greater than 6000, the default queue number range is from 50400 to 50499. </div>
Name	Specify a name to help you identify this queue.
Skill-based Routing	<p>Decide whether to route calls in the queue based on agents' skill level.</p> <p>If this option is enabled, you can specify skill levels for agents, and queue calls will be routed in descending order of agent skill level. For more information, see Set up Skill-based Routing for an Outbound Queue.</p>
Ring Strategy	<p>Select a ring method to distribute calls to agents.</p> <ul style="list-style-type: none"> • Ring All: Ring all available agents simultaneously until someone answers. • Least Recent: Ring the available agent that was least recently called. • Fewest Calls: Ring the available agent with the fewest completed calls. • Random: Ring the agents randomly. • Rrmemory: Round robin with memory. <ul style="list-style-type: none"> ◦ Queue with static agents only: The system remembers the last agent it tried and rings the next agent specified in the static agents list. ◦ Queue with dynamic agents only: The system remembers the last agent it tried and rings the next agent in the order that dynamic agents have logged in. ◦ Queue with both static agents and dynamic agents: The system remembers the last agent

Setting	Description
	<p>it tried and rings the next agent specified in the static agents list. If none of the static agents are available, the system rings the dynamic agent in the order that dynamic agents have logged in.</p> <ul style="list-style-type: none"> • Linear: Ring the available agent in specific order based on the type of agents in the queue. <ul style="list-style-type: none"> ◦ Queue with static agents only: The system rings available agents in the order specified in the agents list. ◦ Queue with dynamic agents only: The system rings available agents in the order that agents have logged in. ◦ Queue with both static agents and dynamic agents: The system rings available agents in the order that agents have logged in.
Maximum Waiting Time (s)	Set a number of seconds that the contact can wait for an available agent.
Failover Destination	<p>Select a destination to route the call when the call is not answered by any agent.</p> <ul style="list-style-type: none"> • Hang up: End the current call. • Extension: Route the call to the specified extension. • Extension Voicemail: Route the call to voicemail box of the specified extension. • Group Voicemail: Route the call to voicemail box of a queue, a ring group, or a custom group. • IVR: Route the call to the specified IVR. • Call Flow: Route the call to the specified call flow. • Ring Group: Route the call to another ring group. • Queue: Route the call to the specified queue. • External Number: Route the call to an external number. • Play Prompt and Exit: Play a custom prompt, then hang up the call.



b. In the **Agent Options** section, configure the following agent settings.



Setting	Description
Agent Timeout(s)	Set a number of seconds that the system rings an agent's phone.
Retry Interval(s)	Set a number of seconds to wait before ringing the next available agent when the last available agent has been ringed and timed out.

Setting	Description
Wrap-up Time(s)	Set a number of seconds for agents to complete post-call processing after finishing a call. The next call will come after this period following the ring strategy.
Agent Announcement	Select a prompt to be played to agents when they answer a queue call.
Ring In Use	Set whether to ring an in-call agent when there are incoming calls in the queue.
Agent Auto Pause	<div>  Note: If the Ring Strategy is set to Ring All, this feature will NOT take effect. </div> <p>Decide whether to automatically pause agents when their consecutive missed calls in the queue reach a threshold.</p> <p>To use this feature, select Agent Auto Pause and specify the threshold in the Max Threshold for Missed Calls drop-down list.</p> <div>  Note: <ul style="list-style-type: none"> Agents will receive a notification email when they are paused. The missed calls count for an agent will be cleared when any of the following events occurs: <ul style="list-style-type: none"> The agent makes or answers a queue call. The agent is paused or logged out. The PBX is rebooted. </div>

c. In the **Prompt** section, complete the following prompt settings.

Setting	Description
Queue-related Announcement	
Join Announcement	Set the announcement to be played to contacts when they join the queue. <ul style="list-style-type: none"> Play full Join Announcement to the caller before ringing extensions: Set whether to play

Setting	Description
	full join announcement to contacts before ringing agents.
Ringback Tone	<p>Select a prompt to be played continuously in a loop to contacts before agents answer the calls.</p> <div>  Note: <ul style="list-style-type: none"> The existing prompts are synchronized from the Music on Hold playlists and custom prompt uploaded on PBX settings > Voice Prompt. The Ringback Tone will be played to contacts after the Join Announcement. </div>
Music On Hold	Set the music to be played to contacts when their calls are put on hold by agents after being answered.
Periodic Announcement	Set the announcement to be played to contacts periodically after they reach the queue and before agents answer the calls.
Frequency (s)	Set the time interval to play the periodic announcements .
Queue Alert Info	<p>Set an "alert info text" to add to Alert-info header in INVITE request for queue calls.</p> <p>When receiving a queue call, the IP phone will inspect "Alert-Info" header to determine which ring tone it should use for ringing.</p>
Linkus Client Distinctive Ringtone	<p>Select or upload a ringtone for agent's Linkus clients.</p> <p>When an agent receives a call from the queue, the designated ringtone will be played on the agent's Linkus client.</p> <div>  Note: <ul style="list-style-type: none"> You can manage the uploaded custom ringtones on PBX Settings > Voice Prompt > Custom Ringtone. If you select an uploaded custom ringtone (rather than a built-in ringtone), it will only apply to agent's Linkus Web Client and Desktop Client for queue calls. Instead, the Linkus Mobile Client will play the ringtone configured in the app. </div>

Setting	Description
	 <ul style="list-style-type: none"> If the call is from a contact with a distinctive ringtone set in the agent's Linkus client, the contact's distinctive ringtone will take priority over the queue ringtone.
Position Announcement	
Announce Position	Set whether to announce the position of the contact in the queue.
Announce Hold Time	Set whether to announce the estimated waiting time to the contact.
Play "Thank You for Your Patience" Prompt	Set whether to play the prompt "Thank You for Your Patience" to contact periodically while the contacts are waiting in the queue.
Frequency (s)	Set the time interval to play the position announcement.
Agent-related Announcement	
Agent ID Announcement	Set whether to play an announcement to both the contact and the agent to prompt the agent ID when an agent answers the call.
Announcement Language	
Custom Prompt Language	Set the language of system default announcements heard by contacts when they answers the calls and join the queue. <div>  <p>Note: The available languages are synchronized from System Prompt (Path: PBX Settings > Voice Prompt > System Prompt).</p> </div>

4. In the **Members** tab, set up members and notification settings for the queue.

a. Set up queue members:

- **Dynamic Agents:** Select the dynamic agents that can log in to or log out of a queue at any time.



Note:

The queue distributes calls to the dynamic agents only when they log in to the queue and unpause the queue calls.

- **Static Agents:** Select the static agents that always stay in the queue.

**Note:**

Static agents do not need to “log in” to the queue, and cannot “log out” of the queue.

- **Queue Managers:** Select the manager that can supervise the outbound call or performance of the campaign and outbound queue, as well as manage the queue agents.

b. Customize queue notifications according to your needs.

Option	Description
Notify Manager when a queue call is missed	If enabled, the system will send an email to queue manager when a queue call is missed.
Notify Manager when a queue call is abandoned	If enabled, the system will send an email to queue manager when a queue call is abandoned.

5. Click **Save** and **Apply**.

Related information

[Allow Agents to View Queue Call Logs](#)

Set up Skill-based Routing for an Outbound Queue

Skill-based routing supports specifying skill level for agents in a queue, and route calls to the designated agents in descending order of their skill levels. Prioritizing queue calls to the most skilled agents ensures properly handling of customer inquiries and enhanced work efficiency.

Requirements

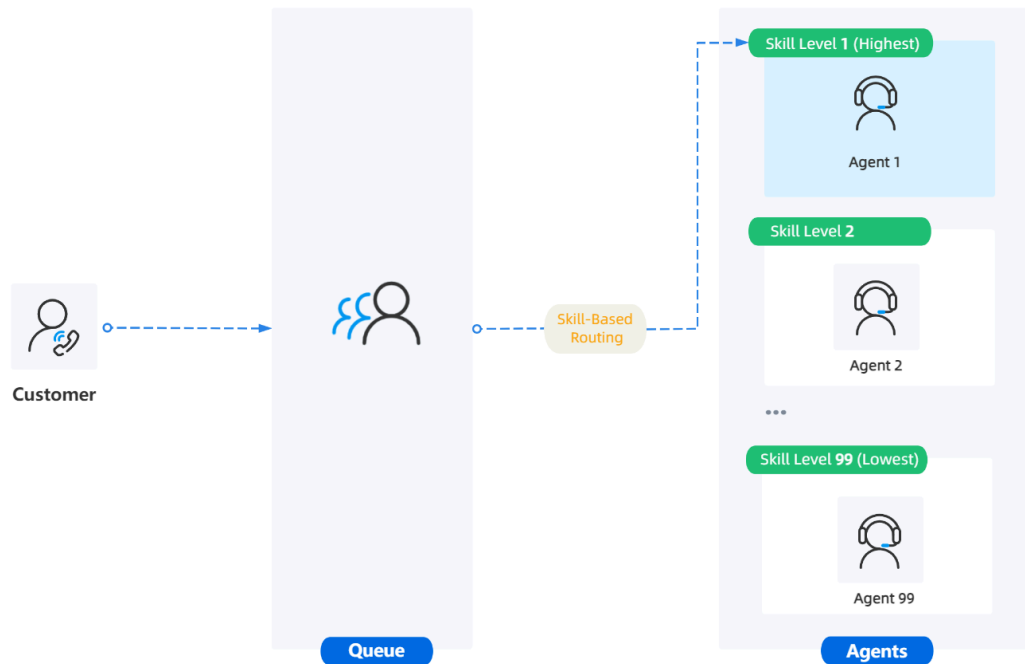
- **Firmware:** Version 83.18.0.59 or later
- **Subscription:** **Outbound Call Center** add-on service

Scenario

Depending on whether there are agents with equal skill level within the same queue, the skill-based routing process varies.

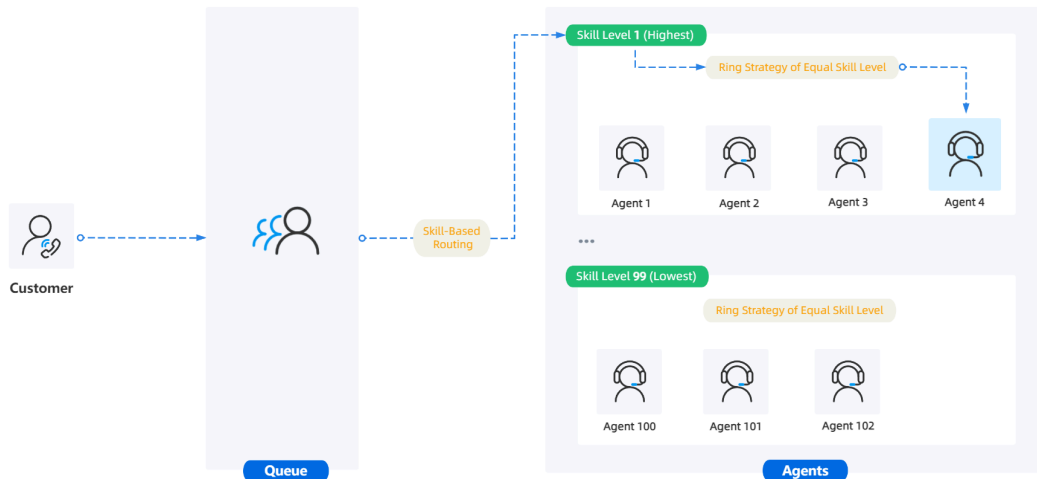
Agents with unique skill levels

In this scenario, each agent in the queue is specified with a unique skill level. When a caller calls into the queue, the call will be directly routed to the agent with highest skill level (1). If the agent is not available, the call will be routed to the next agent in descending order of skill level.




Agents with equal skill level

In this scenario, several agents are specified with equal skill level. When a caller calls into the queue, the call will be directly routed to agents with the highest skill level (1) in the queue, and ring the agent according to the ring strategy of equal skill level. If all the agents with the highest skill level are not available, the call will be routed to the next agents in descending order of skill level.



Procedure

1. Log in to PBX web portal, go to **Call Features > Queue > Outbound Queue**.
2. Click  beside the desired queue.
3. In the **Basic** tab, enable skill-based routing and select ring strategy.

The screenshot shows the 'Basic' configuration tab for a queue. The 'Number' field contains '6420' and the 'Name' field contains 'Outbound Queue A'. The 'Skill-based Routing' checkbox is checked, indicated by a yellow circle 'a'. The 'Ring Strategy of Equal Skill Level' dropdown menu is set to 'Linear', indicated by a yellow circle 'b'. The 'Maximum Waiting Time (s)' is set to '1800'. The 'Failover Destination' is set to 'Hang Up'.

- a. Select the checkbox of **Skill-based Routing**.
- b. In the **Ring Strategy of Equal Skill Level** drop-down list, select the ring strategy for agents of equal skill level.



Note:

If each agent in the queue is assigned with a unique skill level, the system will strictly ring the agents in descending order of skill level, disregarding the ring strategy settings.

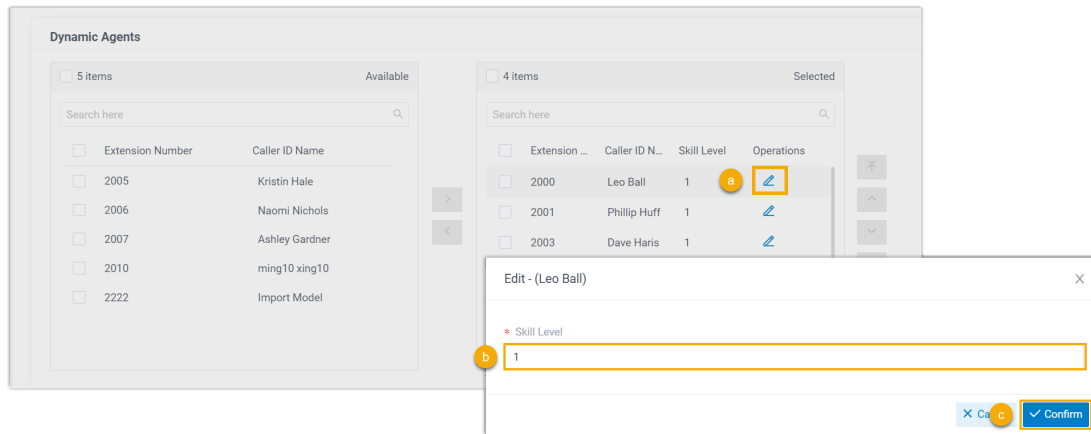
Ring Strategy	Description
Ring All	Ring all agents of equal skill level simultaneously until someone answers.
Least Recent	Among agents of equal skill level, ring the agent that was least recently called.
Fewest Calls	Among agents of equal skill level, ring the agent with the fewest completed calls.
Random	Ring the agents of equal skill level randomly.
Rmemory	<p>Round robin with memory.</p> <ul style="list-style-type: none"> • Queue with static agents only: Among agents of equal skill level, the system remembers the last agent it tried and rings the next agent specified in the static agents list. • Queue with dynamic agents only: Among agents of equal skill level, the system remembers the last agent it tried and rings the next agent in the order that dynamic agents have logged in. • Queue with both static agents and dynamic agents: Among agents of equal skill level, the system remembers the last agent it tried and rings the next agent specified in the static agents list. If none of the static agents are available, the system rings the dynamic agent in the order that dynamic agents have logged in.
Linear	<p>Ring the agents of equal skill level in specific order based on the type of agents in the queue.</p> <ul style="list-style-type: none"> • Queue with static agents only: The system rings agents of equal skill level in the order specified in the agents list. • Queue with dynamic agents only: The system rings agents of equal skill level in the order that agents have logged in. • Queue with both static agents and dynamic agents: The system rings agents of equal skill level in the order that agents have logged in.


4. In the **Members** tab, set the skill level for agents.



Note:

By default, all agents are assigned with the skill level **1** (the highest level).



- a. Click  beside a selected agent.
- b. In the pop-up window, specify a skill level for the agent.

**Note:**

- The permitted value is 1 to 99. The smaller the number, the higher the skill level, and consequently the higher the priority for ringing.
- The agent skill level specified here ONLY takes effect in this queue.

- c. Click **Confirm**.
 - d. Repeat step **a - c** for all the desired agents.
5. Click **Save** and **Apply**.

Result

When a call enters the outbound queue, the system will route the call to agent(s) according to agent skill level, starting from the highest and descending to the lowest.

Agent Management

Enable Shared Wrap-up Time Among Multiple Queues

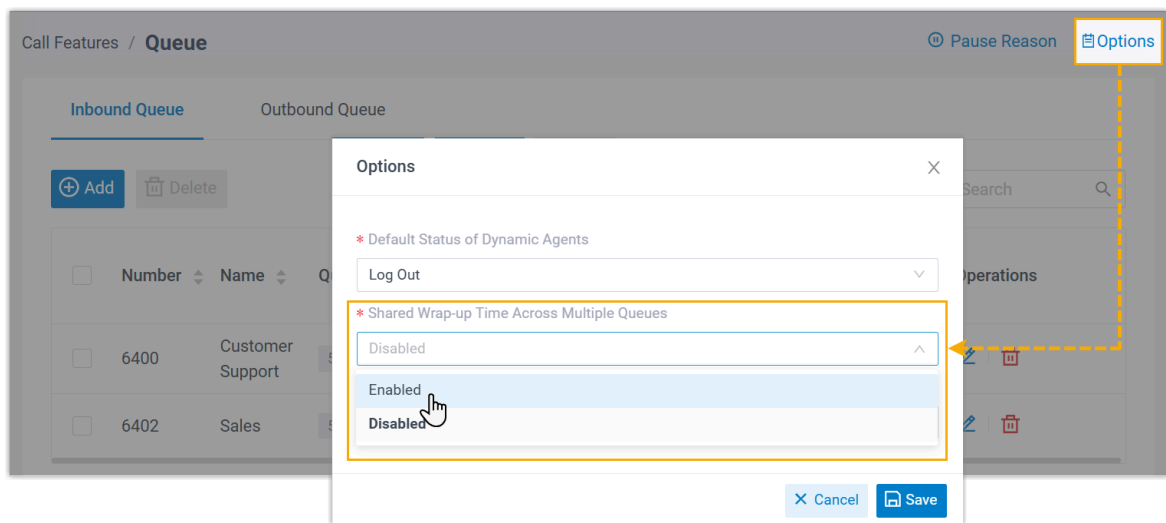
With shared wrap-up time feature, agents who belong to multiple queues will have sufficient time to complete post-call processing after finishing a call, avoiding receiving new calls from other queues during wrap-up time period. This topic describes how to enable shared wrap-up time among multiple queues.

Requirements

The firmware version of PBX server is 83.19.0.110 or later.

Procedure

1. Log in to PBX web portal, go to **Call Features > Queue**.
2. At the top-right corner of page, click **Options**.
3. In the **Shared Wrap-up Time Across Multiple Queues** drop-down list, select **Enabled**



4. Click **Save** and **Apply**.

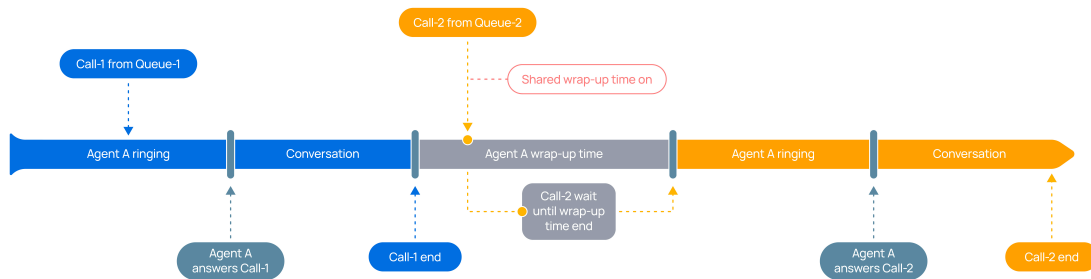
Result

When an agent who belongs to multiple queues finishes a call in one queue, the wrap-up time configured in that queue will be applied across all queues associated with this agent, the agent will not receive new calls from other queues during this wrap-up period.

Example

We provide an example to demonstrate the effect if the shared wrap-up time is enabled.

In this example, we have an agent A belongs to Queue-1 and Queue-2, and Call-1 from Queue-1, Call-2 from Queue-2.



1. A call (call-1) comes into Queue-1, and agent A answers call-1.
2. After finishing call-1, agent A enters a wrap-up period in Queue-1.
3. A second call (call-2) comes into Queue-2 during agent A's wrap-up time.
4. If call-2 is routed to agent A, it will wait until the shared wrap-up time ends (which is configured in Queue-1 and shared across Queue-2 for agent A). Then call-2 will ring to alert agent A to answer it.

Set Default Status for Dynamic Agents

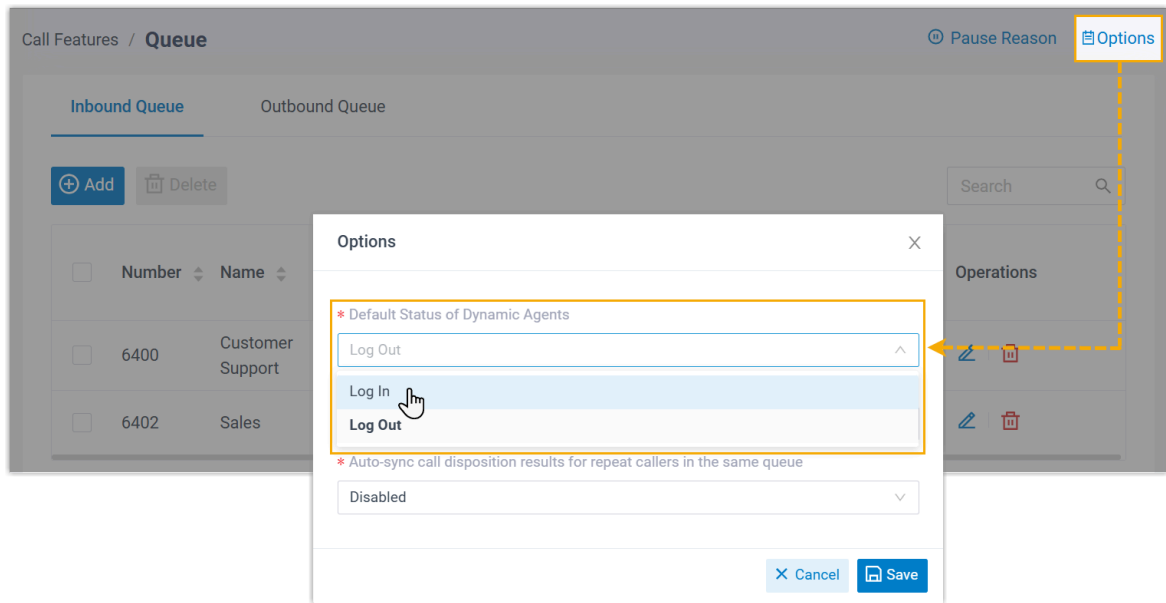
By default, the initial status of dynamic agents is logout after being added to a queue. You can set the default login status for newly added dynamic agents as needed. This pre-set status will be applied globally to all dynamic agents newly added to queues, thus minimizing manual errors and improving management efficiency.

Requirements

The firmware version of PBX server is 83.19.0.110 or later.

Procedure

1. Log in to PBX web portal, go to **Call Features > Queue**.
2. At the top-right corner of page, click **Options**.
3. In the **Default Status of Dynamic Agents** drop-down list, select the desired status.



4. Click **Save**.

Result

The selected default status will be automatically applied to all dynamic agents when they are added to queues.



Note:

Dynamic agents who are already in queues will NOT be affected by this setting.

Automatically synchronize Processing Results for Repeat Calls

The auto-sync for processing results of repeat calls allows the system to automatically apply an updated processing result to all missed or abandoned calls from the same caller to the same queue within a specified time range, which helps maintain consistent call records and prevents multiple agents from making duplicate callbacks to the same caller. This topic describes how to enable the auto-sync for processing results.

Requirements

The firmware version of PBX server is 83.19.0.110 or later.

Procedure

1. Log in to PBX web portal, go to **Call Features > Queue**.

2. At the top-right corner of page, click **Options**.
3. In the pop-up window, do as follows:

- a. In the **Auto-sync call disposition results for repeat callers in the same queue** drop-down list, select **Enabled**.
- b. In the **Time Range (X hours ago)** drop-down list, specify the time range for syncing call processing results.

This setting determines that, starting from the time when an agent manually updates the processing result for a missed or abandoned queue call log, all missed or abandoned call logs from the same number to the same queue received in the preceding {x} hours will be synchronized.

For example, if you set the time range to 2 hours, and update the processing result of a missed call log at 3:00 PM, then call logs of all missed calls from the same number between 1:00 PM and 3:00 PM will be synchronized.

- c. Click **Save**.

Result











When the processing result of a missed / abandoned queue call is updated, other missed calls from the same number to the same queue within the specified time range will be synchronized with the updated status.



Note:




- Synchronization is only triggered when the processing status moves forward (e.g. from **Not Dealt** to **Dealing**).
- The operation details of the synchronized missed call logs will show "Auto Sync" to indicate that the results was updated automatically.

<input type="checkbox"/>	Name	Status	Source	Time	Duration	Call Notes	Operations
<input type="checkbox"/>	 Kristin Hale 5001 (Extension)	 Missed call	Customer Support (6400)	13:08:09	00:00:00	Operator: Leo Ball(5000) Auto Sync Time of Operation: 2025/06/24 13:08:26	 Dealt  
<input type="checkbox"/>	 Kristin Hale 5001 (Extension)	 Missed call	Customer Support (6400)	11:20:40	00:00:00		 Dealt  

Allow Agents to View Queue Call Logs

This topic describes how to allow agents to view queue call logs on their Linkus UC Clients.

Procedure

1. Log in to PBX web portal, go to **Call Features > Queue > Outbound Queue**.
2. Click  beside the desired queue, and enter the **Queue Permissions** tab.
3. In the **Agents** section, complete the following settings.
 - a. Select the checkbox of **Queue Call Logs**.

☒ Queue Call Logs

Member

☒ All
 ☐ Specified Agent

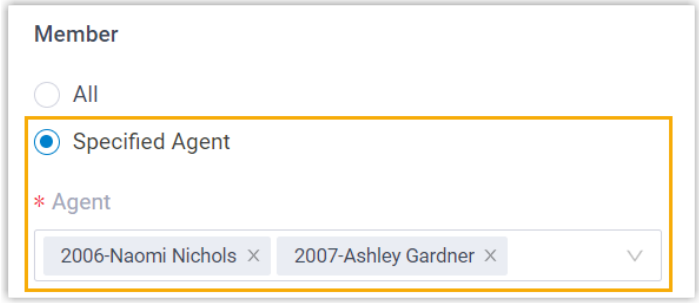
View Range

☒ All

☒ Incoming call
 ☒ Missed call

- b. Set up the viewing permission.

Item	Description
Member	Specify the agents that can view call logs of the queue on their Linkus clients.

Item	Description
	<ul style="list-style-type: none"> • All: All the queue agents can view the queue call logs. • Specified Agent: Only the specified agents can view the queue call logs. 
View Range	<p>Specify the type of queue call logs that the authorized agents can view.</p> <ul style="list-style-type: none"> • All: Agents can view all call logs, including incoming calls and missed calls. • Incoming call: Agents can view the call logs of the queue calls that they answered. • Missed call: Agents can view the call logs of missed queue calls, as well as the missed call processing status.

4. Click **Save** and **Apply**.

Result

The authorized agents are able to view queue call logs on their Linkus UC Clients.

Related information

[Create an Agent-based Campaign](#)

Outbound Campaign Management

Create an Outbound Campaign

Create an Agent-based Campaign

Agent-based campaign involves real-time interaction between outbound queue agents and contacts. It is commonly used for campaigns that require personalized communication, such as product promotion, sales, or surveys. This topic describes how to create an agent-based campaign.




Requirements



- The firmware of Yeastar P-Series Software Edition is 83.18.0.59 or later.
- Ensure that your PBX system meets the following requirements to guarantee uninterrupted call activities.



Note:

If necessary, expand server resources and contact your service provider for license update.

Item	Description
Concurrent call capacity	<p>The system supports sufficient concurrent calls for the following call activities:</p> <ul style="list-style-type: none"> ◦ Basic communication: Handles daily inbound calls, outbound calls, and internal calls. ◦ Outbound Call Center: Exclusively handles outbound calls in campaigns. <div>  Note: It is recommended to reserve 50% of the total concurrent call capacity for daily operations. For the Outbound Call Center, you can adjust the ratio and allocate concurrent call capacity when creating outbound campaigns based on your needs and call volume. </div>
Server resource	<p>The server resource can support the required volume of concurrent calls.</p> <div>  Note: For detailed information about the server requirement based on concurrent call capacity, see System and Server Requirements. </div>
Software licensing	<p>The license includes a subscription to the Outbound Call Center add-on service.</p> <div>  Note: Yeastar provides a 30-day free trial for the service (Path: Plan > Add-on Subscription), which includes 5 concurrent calls. You can try out the service before subscribing. </div>

Item	Description
	 <div> Plan / Add-on Subscription </div> <div>  <div> Outbound Call Center Maximize your proactive outreach to prospects and customers by running outbound call campaigns. Enable dialing automation with auto dialer, improve connect rates, and create more revenue opportunities. </div> <div> Enable 30-day Free Trial </div> </div>

Limitations


The limitations of outbound campaigns vary depending on the system's capacity, as shown below:





Maximum number of Extensions (N)	$N \leq 500$	$N > 500$
Numbers of outbound campaigns	32	128
Numbers of DOD in each campaign	10	10

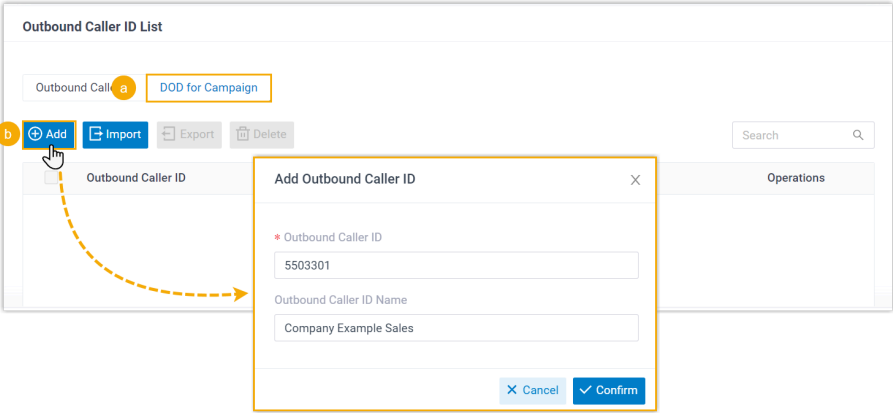
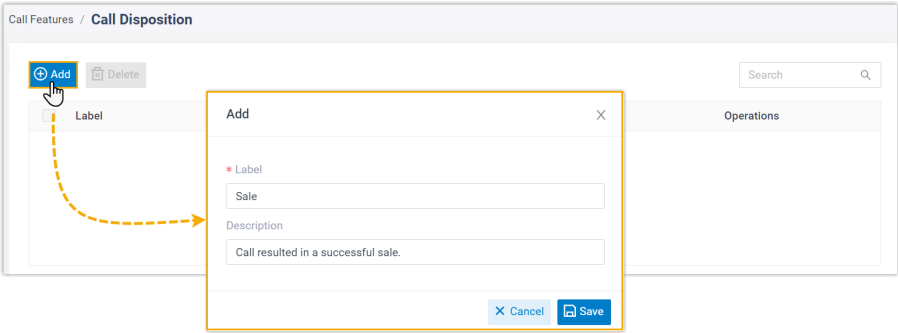
Maximum number of Concurrent Calls (CC)	$CC \leq 100$	$CC > 100$
Numbers of contacts in each campaign	10,000	20,000

Prerequisites

Before your begin, check if the following resources are ready for a campaign:

Item	Description
Outbound Queue	Create an outbound queue to provide a group of agents to handle the campaign calls (Path: Call Features > Queue > Outbound Queue). For more information, see Create an Outbound Queue .
Contact List	<p>Prepare a list of contact with information such as contact name and number for the campaign to dial.</p> <p>You can associate a contact list with a campaign in the following methods:</p> <ul style="list-style-type: none"> Directly use the existing contacts stored in a PBX phonebook. Import a CSV file containing the contacts' information. <div>  Note: To use this method, make sure the file meets the following requirements. </div>

Item	Description
	<div data-bbox="532 258 581 321"></div> <ul style="list-style-type: none"> ◦ Format: UTF-8 .CSV ◦ Size: Less than 300 MB ◦ File name: Less than 127 characters ◦ Import parameters: Ensure that the import parameters meet requirements. For more information, see Company Contacts Parameters. <div data-bbox="532 531 581 594"></div> <p>Tip: You can download an existing contacts list as a file template for edition using the following methods:</p> <ul style="list-style-type: none"> ◦ Download the contact list from an existing outbound campaign (Path: Campaign Management >  > Call Logs). ◦ Export the company contacts (Path: Contacts > Company Contacts > Export).
DNC List	<p>Prepare a list of contact with information such as contact name and number to restrict the campaign from dialing.</p> <p>You can create DNC lists using the following methods:</p> <ul style="list-style-type: none"> • Directly use the existing contacts stored in a PBX phonebook. • Import a CSV file containing the contacts' information. <div data-bbox="532 1161 581 1224"></div> <p>Note: To use this method, make sure the file meets the following requirements.</p> <ul style="list-style-type: none"> ◦ Format: UTF-8 .CSV ◦ Size: Less than 300 MB ◦ File name: Less than 127 characters ◦ Import parameters: Ensure that the import parameters meet requirements. <p>For more information, see Company Contacts Parameters.</p> <ul style="list-style-type: none"> • Add DNC contacts one by one via manual entry.
Trunk	<p>Set the trunk through which the campaign calls will be sent (Path: Extension and Trunk > Trunk). For more information, see Trunk Overview.</p>
Outbound Route	<p>Configure an outbound route that determines how campaign calls are handled and routed based on a set of rules (Path: Call Control > Outbound Route). For more information, see Set up an Outbound Route.</p>

Item	Description
Outbound Caller ID	<p>Optional. Customize outbound caller ID (DOD) for local presence on the trunk through which the campaign calls are sent out (Path: Extension and Trunk > Trunk > Outbound Caller ID > Outbound Caller ID List > DOD for Campaign).</p>  <p>For more information, see Customize Outbound Caller IDs for Outbound Campaigns.</p>
Call Disposition Code	<p>Optional. Add call disposition codes that are used by agents to quickly mark and categorize the results of campaign calls (Path: Call Features > Call Disposition).</p>  <p>For more information, see Add disposition codes.</p>

Procedure

1. Log in to PBX web portal, go to **Outbound Call Center > Campaign Management**, click **Add**.
2. In the **Basic** tab, do as follows:
 - a. In the **Basic** section, complete the following settings.

Basic

* Campaign Name

Sale Campaign

Call Disposition

Sale x

Follow-up Scheduled x

Voicemail x

Disconnected x

Not Interested x

Wrong Number x

- **Campaign Name:** Enter a name to help you identify the campaign.
 - **Call Disposition:** Select one or more disposition codes.
- b. In the **Dialing Hours** section, set time schedule for the campaign.
- **Campaign Start Time & Campaign End Time:** Set the start and end time for the campaign.

**Note:**

Time options are displayed in your computer's time zone, which may differ from the time zone of the PBX system.

- **Dialing Hours:** Specify the business hours when the campaign can initiate outbound calls.

Option	Description
Business Hours by Default Time Zone	<p>If selected, the campaign will initiate outbound calls during the business hours configured in the default time zone (Set in Call Control > Business Hours and Holidays > Default Time Zone > Business Hours).</p> <div> Important: Ensure that at least one business hour has been added in the default time zone settings; otherwise, calls cannot be initiated properly. </div>

Call Control / Business Hours and Holidays

+ Add

Time Zone: 8 China (Beijing) Daylight Saving Time: Disabled Feature Code: *99

Default Time Zone

The UK region

Business Hours

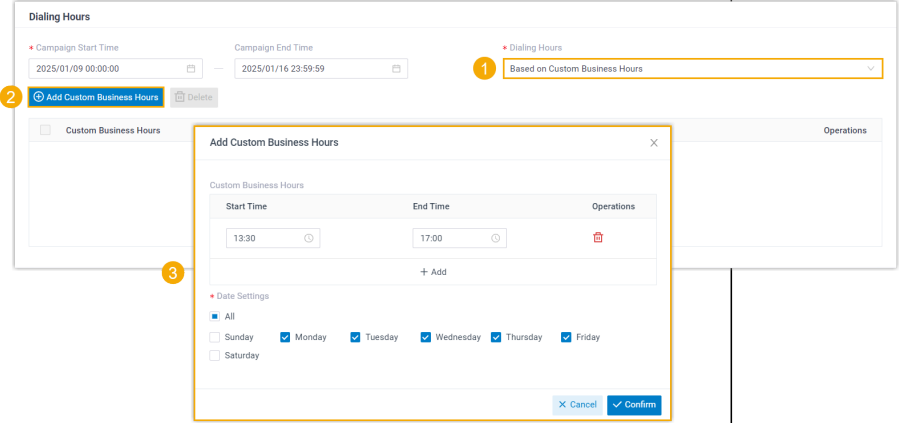
Holidays

+ Add


Delete

<input type="checkbox"/>	Business Hours	Break Hours	Days of week	Month	Date	Rem	Operations
<input type="checkbox"/>	08:00-20:00	15:00-15:30	Mon. Tue. Wed. ...				

For example, if you set the **Campaign Start Time** to the current date, and the time is within business hours, the campaign will initiate outbound calls immediately after saving.




Option	Description
Based on Custom Business Hours	<p>If selected, you can add the specific business hours and the week of days for the campaign based on the system's default time zone.</p> 

3. Click the **Call Rules** tab, specify dialer mode and configure call rules.
 - a. In the **Dialer Mode** drop-down list, select a dialer mode according to your needs.

Mode	Description
Progressive	<p>The system waits for an agent to finish the current call before dialing the next number, and only dials one number per available agent.</p> <p>E.g. If there are 5 available agents, the system places 5 calls.</p>
Power	<p>The system dials multiple numbers simultaneously based on a rate specified in the Dial Rate field, without waiting for an agent to finish the previous call.</p> <p>E.g. If the dial rate is set to 3, the system places 3 calls for each available agent.</p> <div style="border: 1px solid #007bff; padding: 10px; margin-top: 10px;"> <p> Note:</p> <ul style="list-style-type: none"> • The value must be greater than 0, and may not be greater than 9. • If there is a decimal, the system will round down to the nearest whole number. </div>

- b. Configure the following call rules for the campaign.










Setting	Description
Maximum Concurrent Calls	Specify the maximum number of concurrent calls allowed in the campaign.

Setting	Description
	 Note: <ul style="list-style-type: none"> • The maximum concurrent calls are limited by the trunk's maximum concurrent calls. • The system supports dialling up to 10 outbound calls simultaneously. Any additional calls will be dialed in groups of 10 until all calls in the campaign are completed.
Ring Timeout (s)	Set a number of seconds that the dialer will attempt to call a contact before timing out and considering it as no answer.
Outbound Queue	Select an outbound queue that you want to participate in this campaign and handle calls.
Record Calls	Set whether to record calls in the campaign.
Max Attempts Per Contact	Set the maximum number of call attempts per contact.
Retry Interval (min.)	Set the minimum time interval (in minutes) between consecutive call attempts when retrying to reach a contact.
Set DOD	<p>Specify Outbound Caller IDs (DOD) for the campaign. If enabled, select the desired outbound caller ID(s) associated with the trunk through which the campaign calls are sent out.</p>  Note: <ul style="list-style-type: none"> • When multiple DODs are selected, they will be used based on the selection order. • If the feature is not enabled, the outbound caller ID will be determined based on the system's default priority rules.
Prefix	<p>If needed, define the digit(s) that will be added at the beginning of a dialed number to match the dial rule of specific outbound routes.</p>  Note: <p>This setting is available only when Set DOD is enabled.</p>

4. Click the **Contacts** tab, complete the contact settings.

a. Upload the contacts list by either of the following methods.

Method	Instruction
Import	To import a contacts list file to the campaign, do as follows:

Method	Instruction
	<div data-bbox="586 262 1425 409">   <p>* Choose a File</p> <input data-bbox="597 352 1268 394" type="text"/>   </div> <p>i. Select Import.</p> <p>ii. In the Choose a File field, click Upload, then select a CSV file containing the contact details to upload.</p> <div data-bbox="597 594 1382 821">  <p>Note: The imported contact list is only associated with the outbound campaign and will be removed upon the deletion of the campaign. If necessary, you can store these contacts to a PBX phonebook. For more information see Import Campaign Contacts to a Phonebook.</p> </div>
PhoneBooks	<p>To directly use the existing contacts stored in a PBX phonebook, do as follows:</p> <div data-bbox="578 951 1468 1115">  <div data-bbox="646 957 818 999">  </div> <p>* PhoneBooks</p> <div data-bbox="578 1052 626 1104">  </div> <div data-bbox="651 1052 943 1104"> <input data-bbox="659 1062 1446 1094" type="text" value="Company A - Customers"/> </div> </div> <p>i. Select PhoneBooks.</p> <p>ii. In the PhoneBooks drop-down list, select the phonebook where the desired contacts are stored.</p> <div data-bbox="678 1304 1349 1488">  <p>Note: If the phonebook has attempt control rule configured, the rule will be displayed. It limits the maximum call attempts per contact/number across all dialer campaigns.</p> </div>

- b. In the **Number Type** drop-down list, select the number type(s) to dial.

The system will automatically attempts to dial the number types based on the selection order, until the call is successfully connected or [the number of maximum call attempts](#) is reached.

- c. If you want to prevent outbound queue managers and agents from viewing the full contact number, select the checkbox of **Masked Number**.

**Note:**

If enabled, the call popup feature will NOT take effect.

Queue managers and agents will only see partially masked phone numbers in the campaign. E.g. 183*****21.

- d. In the **Contact Sorting** section, specify the sorting criteria to determine the order in which contacts will be dialed.

- e. If you want to implement DNC restriction in the campaign, proceed as follows:

- **Select DNC Lists:** To restrict DNC numbers from being dialed, select DNC lists from the drop-down list of **Select DNC Lists**.

When initiating an outbound campaign, the system will check dial list against the assigned DNC list(s) based on the number matching rule configured in **Contacts > Company Contacts > Options** and skip calls to the DNC numbers.

How numbers are matched depending on the rule you configure:

- **Do Not Match** or **Exact Match:** A number is regarded as DNC number only if it exactly matches an entry in the DNC list.
- **Match the last {number} digits:** A number is regarded as a DNC number if its last {number} digits match any entry in the DNC list.
- **Allow Agent to Add Contacts to DNC Lists:** To allow agents to add DNC numbers during the campaign call, select this option. Then choose exist-

ing DNC list(s) or click **Create New** to create a new one that agents can update.



Note:

You can view the DNC contacts added by agents in campaign details (Path: **Outbound Call Center > Campaign Management > View > Call Logs > Do Not Call**).

Call Logs						
<div> Waiting to Dial Ringing Talking Already Dialed Scheduled Callback Do Not Call </div>						
<div> Download Search </div>						
Name	Business	Target Lists	Agent	Remark	Creation Time	
Leo Ball	18300002001		Sarah Benne[5002]		2025/07/11 14:22:12	
<div> Total: 1 1 20 / page </div>						

f. Double check the contact settings as the contact information can NOT be changed after saving.

5. Click **Save**.

6. In the pop-up window, click **OK**.

Result

- A campaign is created successfully and displayed in the **Campaign Management** list.
- When it comes to the start time of the campaign, system automatically initiates outbound calls to the specified contacts, and connects the answered calls to agents in the selected outbound queue.

Related information

[View Outbound Campaign Details](#)

[Supervisor Guide - View Campaign Details on Wallboard](#)

[Agent Guide - Handle Campaign Calls on Inbox](#)

Create an Agentless Campaign

Agentless campaign relies on IVR systems or voice prompts, and does not require direct agent involvement. It is commonly used for payment reminders, event notifications, surveys, and simple confirmations. This topic describes how to create an agentless campaign.




Requirements



- The firmware of Yeastar P-Series Software Edition is 83.18.0.59 or later.
- Ensure that your PBX system meets the following requirements to guarantee uninterrupted call activities.



Note:

If necessary, expand server resources and contact your service provider for license update.

Item	Description
Concurrent call capacity	<p>The system supports sufficient concurrent calls for the following call activities:</p> <ul style="list-style-type: none"> ◦ Basic communication: Handles daily inbound calls, outbound calls, and internal calls. ◦ Outbound Call Center: Exclusively handles outbound calls in campaigns. <div>  Note: It is recommended to reserve 50% of the total concurrent call capacity for daily operations. For the Outbound Call Center, you can adjust the ratio and allocate concurrent call capacity when creating outbound campaigns based on your needs and call volume. </div>
Server resource	<p>The server resource can support the required volume of concurrent calls.</p> <div>  Note: For detailed information about the server requirement based on concurrent call capacity, see System and Server Requirements. </div>
Software licensing	<p>The license includes a subscription to the Outbound Call Center add-on service.</p> <div>  Note: Yeastar provides a 30-day free trial for the service (Path: Plan > Add-on Subscription), which includes 5 concurrent calls. You can try out the service before subscribing. </div>

Item	Description
	 <div> Plan / Add-on Subscription </div> <div>  <div> Outbound Call Center Maximize your proactive outreach to prospects and customers by running outbound call campaigns. Enable dialing automation with auto dialer, improve connect rates, and create more revenue opportunities. </div> <div> Enable 30-day Free Trial </div> </div>

Limitations

The limitations of outbound campaigns vary depending on the system's capacity, as shown below:




Maximum number of Extensions (N)	$N \leq 500$	$N > 500$
Numbers of outbound campaigns	32	128
Numbers of DOD in each campaign	10	10

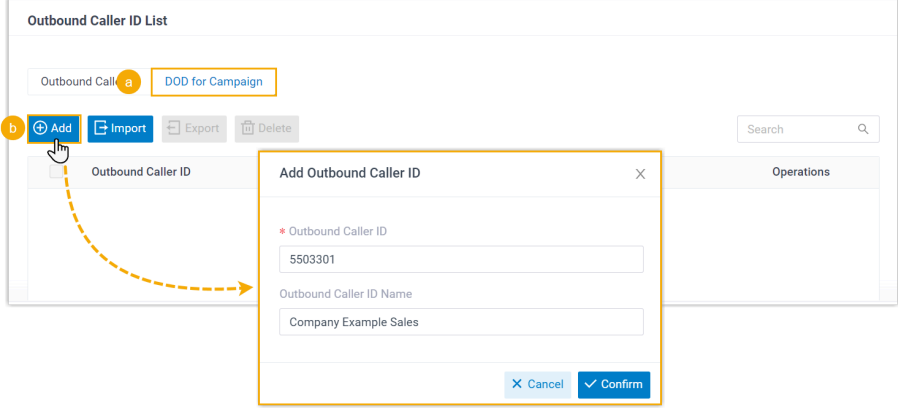
Maximum number of Concurrent Calls (CC)	$CC \leq 100$	$CC > 100$
Numbers of contacts in each campaign	10,000	20,000

Prerequisites

Before you begin, check if the following resources are ready for a campaign.

Item	Description
IVR	<p>If you want the contacts to be connected to and interact an IVR system after answering the call, set up an IVR and customize the desired IVR menu (Path: Call Features > IVR).</p> <p>For more information, see Set up an IVR.</p>
Prompts	<p>If you want the system to play a voice prompt to the contacts to deliver the necessary information, prepare a custom prompt (Path: PBX Settings > Voice Prompt > Custom Prompt).</p> <p>For more information, see Record a Custom Prompt or Upload a Custom Prompt.</p>
Contact List	<p>Prepare a list of contact with information such as contact name and number for the campaign to dial.</p> <p>You can associate a contact list with a campaign in the following methods:</p>

Item	Description
	<ul style="list-style-type: none"> • Directly use the existing contacts stored in a PBX phonebook. • Import a CSV file containing the contacts' information. <div>  Note: To use this method, make sure the file meets the following requirements. <ul style="list-style-type: none"> ◦ Format: UTF-8 .CSV ◦ Size: Less than 300 MB ◦ File name: Less than 127 characters ◦ Import parameters: Ensure that the import parameters meet requirements. For more information, see Company Contacts Parameters. </div> <div>  Tip: You can download an existing contacts list as a file template for edition using the following methods: <ul style="list-style-type: none"> ◦ Download the contact list from an existing outbound campaign (Path: Campaign Management >  > Call Logs). ◦ Export the company contacts (Path: Contacts > Company Contacts > Export). </div>
Trunk	Set the trunk through which the campaign calls will be sent (Path: Extension and Trunk > Trunk). For more information, see Trunk Overview .
Outbound Route	Configure an outbound route that determines how campaign calls are handled and routed based on a set of rules (Path: Call Control > Outbound Route). For more information, see Set up an Outbound Route .
Outbound Caller ID	Optional. Customize outbound caller ID (DOD) for local presence on the trunk through which the campaign calls are sent out (Path: Extension and Trunk > Trunk > Outbound Caller ID > Outbound Caller ID List > DOD for Campaign).

Item	Description
	 <p>For more information, see Customize Outbound Caller IDs for Outbound Campaigns.</p>

Procedure


1. Log in to PBX web portal, go to **Outbound Call Center > Campaign Management**, click **Add**.
2. In the **Basic** tab, do as follows:
 - a. In the **Basic** section, enter a name in the **Campaign Name** field to help you identify the campaign.
 - b. In the **Dialing Hours** section, set time schedule for the campaign.
 - **Campaign Start Time & Campaign End Time:** Set the start and end time for the campaign.


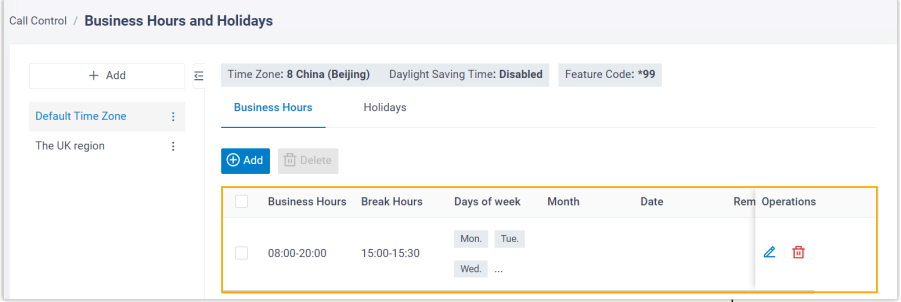
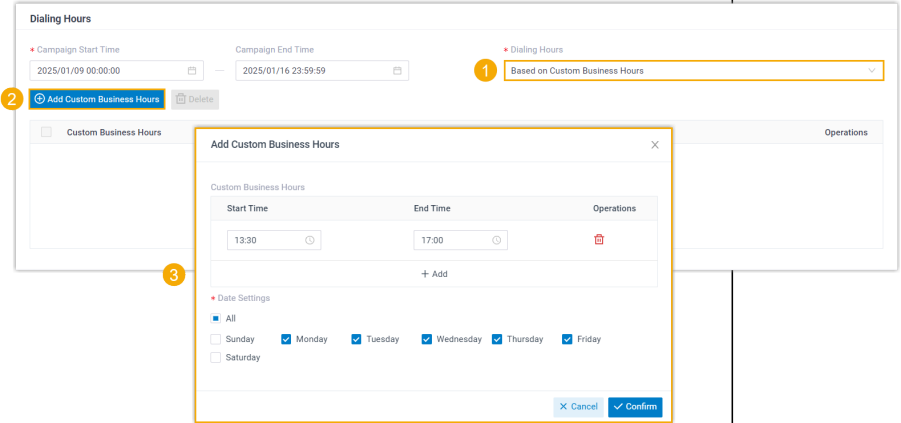


Note:

Time options are displayed in your computer's time zone, which may differ from the time zone of the PBX system.


- **Dialing Hours:** Specify the business hours when the campaign can initiate outbound calls.


Option	Description
Business Hours by Default Time Zone	<p>If selected, the campaign will initiate outbound calls during the business hours configured in the default time zone (Set in Call Control > Business Hours and Holidays > Default Time Zone > Business Hours).</p> <div>  Important: </div>


Option	Description
	<p> Ensure that at least one business hour has been added in the default time zone settings; otherwise, calls cannot be initiated properly.</p>  <p>For example, if you set the Campaign Start Time to the current date, and the time is within business hours, the campaign will initiate outbound calls immediately after saving.</p>
Based on Custom Business Hours	<p>If selected, you can add the specific business hours and the week of days for the campaign based on the system's default time zone.</p> 

3. Click the **Call Rules** tab, specify dialer mode and configure call rules.

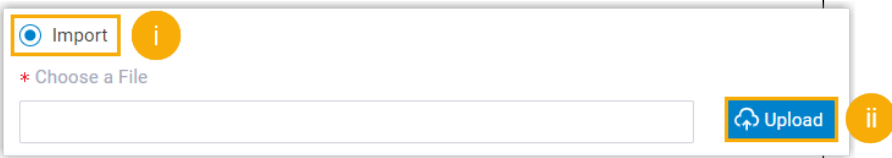



- In the **Dialer Mode** drop-down list, select **Agentless**.
- Configure the following call rules for the campaign.


Setting	Description
Maximum Concurrent Calls	<p>Specify the maximum number of concurrent calls allowed in the campaign.</p> <p> Note:</p> <ul style="list-style-type: none"> The maximum concurrent calls are limited by the trunk's maximum concurrent calls.

Setting	Description
	 <ul style="list-style-type: none"> The system supports dialling up to 10 outbound calls simultaneously. Any additional calls will be dialed in groups of 10 until all calls in the campaign are completed.
Ring Timeout (s)	Set a number of seconds that the dialer will attempt to call a contact before timing out and considering it as no answer.
Destination	<p>Select the destination to which the calls will be routed after contacts answer the call.</p> <ul style="list-style-type: none"> IVR: If selected, choose a specific IVR from the IVR drop-down list. <div data-bbox="779 688 1479 753"> <div> Destination <div>IVR</div> </div> <div> IVR 6203-Outbound survey IVR </div> </div> <ul style="list-style-type: none"> Play Greeting then Hang Up: If selected, choose the desired voice prompt from the Greetings drop-down list, then set the prompt repeat times in the Play Times field. <div data-bbox="779 945 1479 1073"> <div> Destination <div>Play Greeting then Hang Up</div> </div> <div> Greetings <div>PaymentReminder.wav</div> </div> <div> Play Times <div>2</div> </div> </div>
Max Attempts Per Contact	Set the maximum number of call attempts per contact.
Retry Interval (min.)	Set the minimum time interval (in minutes) between consecutive call attempts when retrying to reach a contact.
Set DOD	<p>Specify Outbound Caller IDs (DOD) for the campaign. If enabled, select the desired outbound caller ID(s) associated with the trunk through which the campaign calls are sent out.</p> <div data-bbox="727 1465 773 1514"> </div> <p>Note:</p> <ul style="list-style-type: none"> When multiple DODs are selected, they will be used based on the selection order. If the feature is not enabled, the outbound caller ID will be determined based on the system's default priority rules.
Prefix	If needed, define the digit(s) that will be added at the beginning of a dialed number to match the dial rule of specific outbound routes.

Setting	Description
	 Note: This setting is available only when Set DOD is enabled.

4. Click the **Contacts** tab, complete the contact settings.
 - a. Upload the contacts list by either of the following methods.

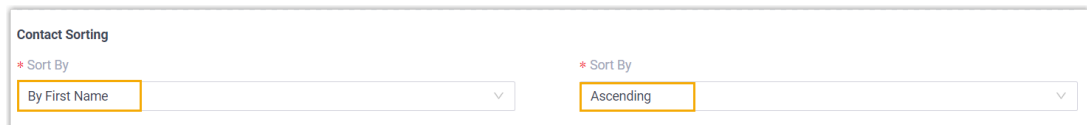
Method	Instruction
Import	<p>To import a contacts list file to the campaign, do as follows:</p> <div data-bbox="581 646 1468 802">  <p>The screenshot shows the 'Import' method selected with a radio button. Below it is a 'Choose a File' label and a text input field. To the right of the input field is an 'Upload' button with a cloud icon. Information icons (i and ii) are present.</p> </div> <ol style="list-style-type: none"> i. Select Import. ii. In the Choose a File field, click Upload, then select a CSV file containing the contact details to upload. <div data-bbox="581 970 1393 1234">  Note: The imported contact list is only associated with the outbound campaign and will be removed upon the deletion of the campaign. If necessary, you can store these contacts to a PBX phonebook. For more information see Import Campaign Contacts to a Phonebook. </div>
PhoneBooks	<p>To directly use the existing contacts stored in a PBX phonebook, do as follows:</p> <div data-bbox="581 1339 1468 1507">  <p>The screenshot shows the 'PhoneBooks' method selected with a radio button. Below it is a 'PhoneBooks' label and a drop-down menu. The drop-down menu is open, showing 'Company A - Customers' as the selected option. Information icons (i and ii) are present.</p> </div> <ol style="list-style-type: none"> i. Select PhoneBooks. ii. In the PhoneBooks drop-down list, select the phonebook where the desired contacts are stored. <div data-bbox="581 1675 1393 1801">  Note: If the phonebook has attempt control rule configured, the rule will be displayed. It limits the maximum </div>

Method	Instruction
	 call attempts per contact/number across all dialer campaigns.

- b. In the **Number Type** drop-down list, select the number type(s) to dial.

The system will automatically attempts to dial the number types based on the selection order, until the call is successfully connected or the number of maximum call attempts is reached.

- c. In the **Contact Sorting** section, specify the sorting criteria to determine the order in which contacts will be dialed.



- d. Double check the contact settings as the contact information can NOT be changed after saving.
5. Click **Save**.
6. In the pop-up window, click **OK**.


Result

- A campaign is created successfully and displayed in the **Campaign Management** list.
- When it comes to the start time of the campaign, system automatically initiate outbound calls to the specified contacts, and connect the answered calls to the predefined destination.

View Outbound Campaign Details

This topic describes how to view the campaign details, including the basic information, metrics, call result statistics, as well as call logs.

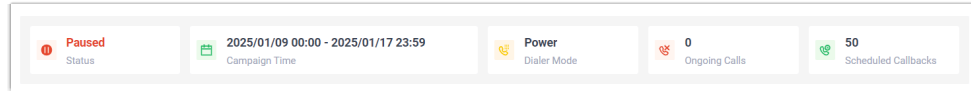
Procedure

1. Log in to PBX web portal, go to **Outbound Call Center > Campaign Management**.
2. Click  beside the desired campaign.
3. Check the campaign details as needed.
 - [Campaign overview](#)
 - [Key metrics](#)

- [Outbound call result statistics](#)
- [Call logs](#)

Campaign overview

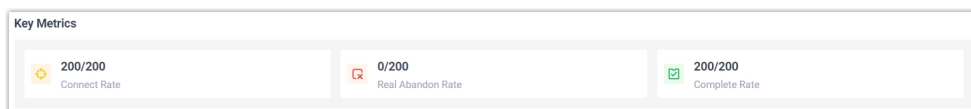
Provides the basic information of the campaign.




Widget	Description
Status	<p>The current status of the campaign.</p> <ul style="list-style-type: none"> : To be improved. The contacts list is empty and needs to be completed. : Importing. The contacts list is being imported to the campaign. : To be Started. The campaign will start at a scheduled time. : In Progress. The campaign is in progress. : Paused. The campaign is paused. : Ended. The campaign has been ended.
Campaign Time	The start and end time of the campaign.
Dialer Mode	The type of dialer used in the campaign.
Ongoing Calls	The number of calls that are still in progress or not yet completed.
Scheduled Callbacks	The number of callbacks scheduled by agents.

Key Metrics

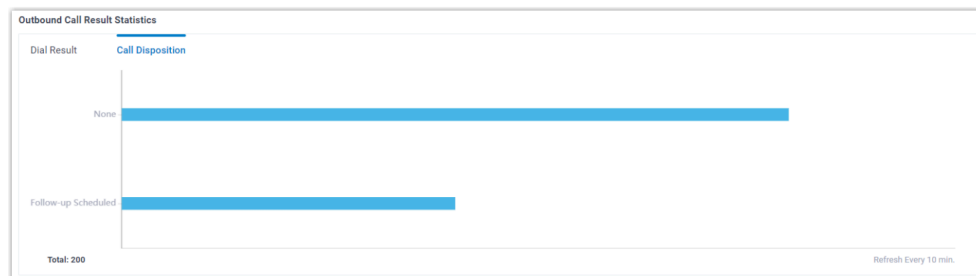
Provides an overview of key metrics that are essential for evaluating campaign performance.




Metric	Description
Connect Rate	<p>The rate at which calls are successfully connected to the contacts, which reflects the validity of the phone numbers.</p> <p>Formula: Number of calls the contacts has answered / Total number of calls dialed</p>
Real Abandon Rate	<p>The rate at which contacts abandon the call before being answered by an agent, which reflects the efficiency of agents.</p> <p>Formula: Number of call abandoned by contacts / Total Number of calls routed to the queue</p> <div>  Note: Only available for agent-based campaigns. </div>
Complete Rate	<p>The rate at which calls are successfully completed, which reflects the completing efficiency of the campaign.</p> <p>Formula: Number of dialed contacts / Total number of contacts</p>

Outbound Call Result Statistics

Provides statistics on the outbound campaign calls, including dial results and call dispositions, to give insight into the effectiveness of the campaign.



Item	Description
Dial Result	The dialing outcomes generated during the campaign. It is automatically generated by the system and indicates the status of calls, such as C for completed (successful connection), F for failed, or other predefined statuses.
Call Disposition	The statistics for codes logged by agents for the calls during the campaign. <div>  Note: Only available for agent-based campaigns. </div>

Call Logs

Displays the list of contacts to be dialed, the DNC contacts that agents added, the real-time records and details of campaign calls, categorized by the following statuses.



Note:

- You can store valuable prospects from the call logs to a PBX phonebook for follow-up. For more information, see [Import Campaign Contacts to a Phonebook](#)
- You can download the DNC list and call log data, including call details and contact information, for campaign analysis or contact base update. For more information, see [Export Do Not Call Data for Outbound Campaign](#) and [Export Call Log Data for Outbound Campaign](#).

Call Logs

Waiting to Dial

Ringing

Talking

Already Dialed


Scheduled Callback







Import Contacts to Phonebook

Download

Search

Time	Name	Number	Agent	Dial Result	Call Disposition	Remark	Details
2025/01/09 16:04:39	Company A Custo...	1555121007	661262	C-Completed	Follow-up Scheduled	Need to follow up	
2025/01/09 16:04:38	Company A Custo...	1555121006	661261	C-Completed			
2025/01/09 16:04:38	Company A Custo...	1555121005	661265	C-Completed			


Status	Description
Waiting to Dial	The list of contacts waiting to be dialed.
Ringing	Calls that are currently in ringing status. <div>  Note: </div>

Status	Description
	 Only available for agent-based campaigns.
Talking	Calls that are currently in progress.  Note: Only available for agent-based campaigns.
Already Dialed	Calls that have been dialed, either succeeded or not.  Note: You can click  beside the call log to check the call details.
Scheduled Callback	Callbacks requested by agents when handling campaign calls.  Note: Only available for agent-based campaigns.
Do Not Call	DNC contacts added by agents when handling campaign calls.  Note: Only available for agent-based campaigns.

Import Campaign Contacts to a Phonebook

This topic describes how to import contacts from a campaign into a PBX phonebook for streamlined management.

Procedure

1. Log in to PBX web portal, go to **Outbound Call Center > Campaign Management**.
2. Click  beside the desired campaign, then go to the **Call Logs** section.
3. Under the specific call log tab, search or filter the desired contacts.

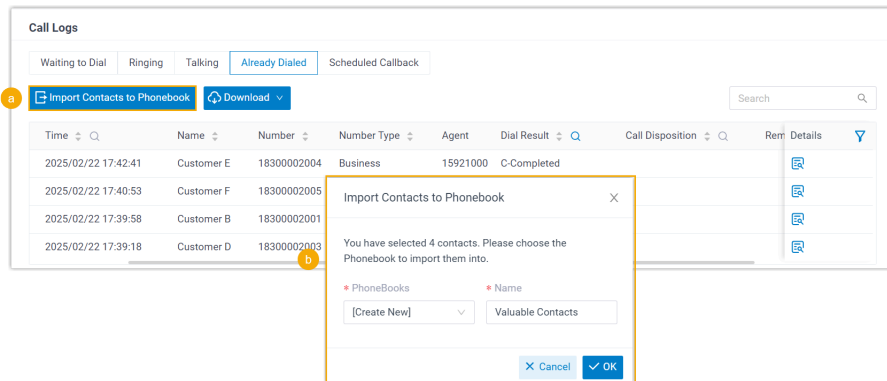
Call Logs

Waiting to Dial Ringing Talking **Already Dialed** Scheduled Callback

[Import Contacts to Phonebook](#) [Download](#) [Filter](#) [Search](#)

Time	Name	Number	Number Type	Agent	Dial Result	Call Disposition	Rem	Details
2025/02/22 17:42:41	Customer E	18300002004	Business	15921000	C-Completed			
2025/02/22 17:40:53	Customer F	18300002005	Business	15921000	C-Completed			
2025/02/22 17:39:58	Customer B	18300002001	Business	15921000	C-Completed			
2025/02/22 17:39:18	Customer D	18300002003	Business	15921000	C-Completed			

4. Do as follows to import the contacts.



- At the top of the contact list, click **Import Contacts to Phonebook**.
- In the pop-up window, select the desired phonebook or create a new one, then click **OK**.

Result

The page prompts "Imported successfully.", indicating that the information of the contacts are added into the specified phonebook.

Export Call Log Data for Outbound Campaign

You can export call log data for an outbound campaign, including the details of each call and the associated contact information, which can be used to analyze the performance of the campaign, track call outcomes, update the contact base or integrate your contact list with other CRM systems, etc.

Procedure

- Log in to PBX web portal, go to **Outbound Call Center > Campaign Management**.
- Click [📄](#) beside the desired campaign, then scroll down to the **Call Logs** section.
- Under the specific call log tab, search or filter the desired contacts.

Call Logs

Waiting to Dial Ringing Talking **Already Dialed** Scheduled Callback

Import Contacts to Phonebook Download

Search

Filter

Time	Name	Number	Number Type	Agent	Dial Result	Call Disposition	Rem	Details
2025/02/22 17:42:41	Customer E	18300002004	Business	15921000	C-Completed			
2025/02/22 17:40:53	Customer F	18300002005	Business	15921000	C-Completed			
2025/02/22 17:39:58	Customer B	18300002001	Business	15921000	C-Completed			
2025/02/22 17:39:18	Customer D	18300002003	Business	15921000	C-Completed			

4. Download the call log data according to your needs.

- To download contact list, click **Download** and select **Download Contacts**.

Call Logs

Waiting to Dial Ringing Talking **Already Dialed** Scheduled Callback

Import Contacts to Phonebook Download

Search

ID	Time	Name	Number	Number Type	Agent	Call Disposition	Remark	Ca	Details
20250223165212BB60B	2025/02/23 16:51:47	Customer F	18300002005	Business				No	
20250223165117E15AA	2025/02/23 16:51:47	Customer C	18300002002	Business				No	

A CSV file containing the contacts information is downloaded to your computer.

- To download the call log details, click **Download** and select **Download List**.

Call Logs

Waiting to Dial Ringing Talking **Already Dialed** Scheduled Callback

Import Contacts to Phonebook Download

Search


ID	Time	Name	Number	Number Type	Agent	Call Disposition	Remark	Ca	Details
20250223165212BB60B	2025/02/23 16:51:47	Customer F	18300002005	Business				No	
20250223165117E15AA	2025/02/23 16:51:47	Customer C	18300002002	Business				No	

A CSV file containing the call logs as well as relevant call details is downloaded to your computer.

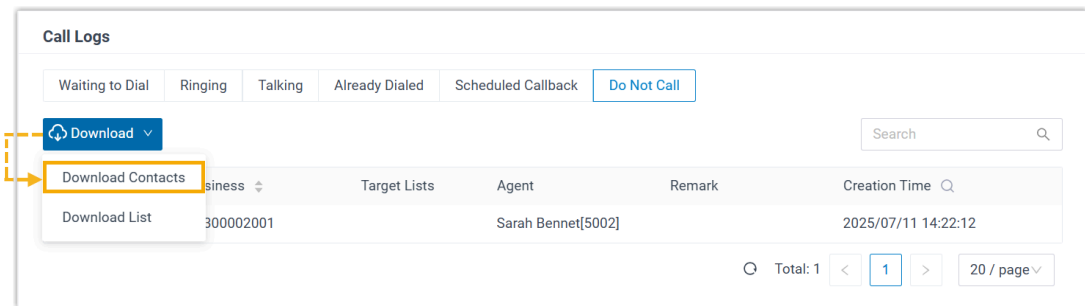
Export Do Not Call Data for Outbound Campaign

You can export Do Not Call (DNC) data for an outbound campaign, which can be used to review or import to other systems.

Procedure

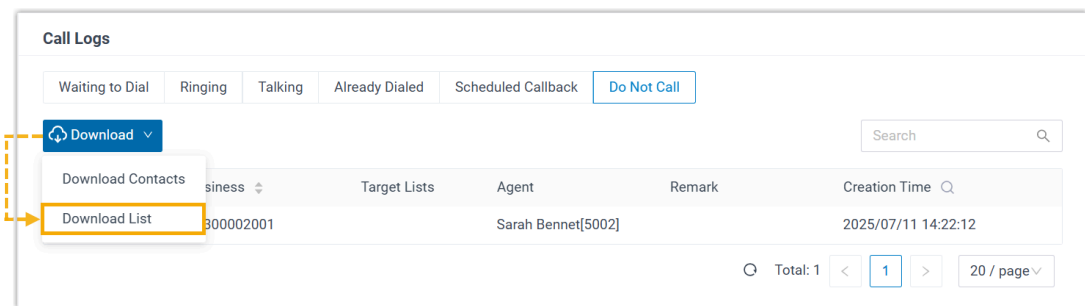
- Log in to PBX web portal, go to **Outbound Call Center > Campaign Management**.
- Click  beside the desired campaign, then scroll down to the **Call Logs** section.
- Under the **Do Not Call** tab, download the DNC data according to your needs.

- To download DNC contacts list, click **Download** and select **Download Contacts**.



A CSV file containing the contacts information is downloaded to your computer.

- To download the DNC contacts details, click **Download** and select **Download List**.



A CSV file containing the DNC contacts as well as relevant creation details is downloaded to your computer.

Manage Outbound Campaigns


This topic describes how to manage outbound campaigns.

Pause an outbound campaign

1. Log in to PBX web portal, go to **Outbound Call Center > Campaign Management**.
2. Click **||** beside an in-progress campaign.
3. In the pop-up window, click **OK**.

The campaign is paused, no new calls will be initiated. However, ongoing campaign calls will continue without interruption.

Resume an outbound campaign

1. Log in to PBX web portal, go to **Outbound Call Center > Campaign Management**.
2. Click  beside a paused campaign.
3. In the pop-up window, click **OK**.

The campaign is resumed.

End an outbound campaign

1. Log in to PBX web portal, go to **Outbound Call Center > Campaign Management**.
2. Click  beside the campaign.
3. In the pop-up window, click **OK**.


The campaign is ended and can NOT be resumed. However, ongoing campaign calls will continue without interruption.

Edit an outbound campaign



Note:

- You can NOT edit an in-progress outbound campaign.
- The dialer mode and contacts settings can NOT be modified.

1. Log in to PBX web portal, go to **Outbound Call Center > Campaign Management**.
2. Click  beside the campaign.
3. In the pop-up window, click **OK**.

The campaign settings are updated and applied to new campaign calls, the ongoing calls will not be affected.


Delete outbound campaigns



Note:

You can NOT delete an in-progress outbound campaign.

1. Log in to PBX web portal, go to **Outbound Call Center > Campaign Management**.

2. Click  beside the campaign.
3. In the pop-up window, click **OK**.

Do Not Call Management

Add a DNC List

Do Not Call (DNC) List is a collection of phone numbers that should never be dialed during outbound campaigns. This topic describes how to add a DNC list to prevent specific numbers from being dialed.

Requirements and restrictions

Requirements

PBX's firmware version is 83.20.0.21 or later.

Restrictions

- **Maximum number of DNC lists:** 200 (max. extensions < 1000) or 500 (max. extensions ≥ 1000)
- **Maximum number of DNC contacts:** 100,000 (max. extensions < 1000) or 200,000 (max. extensions ≥ 1000)



Note:



The contact limit covers **DNC contacts that are manually added and imported**. Contacts read from phonebooks are not included.

Introduction

Yeastar P-Series Software Edition enables you to create one or more DNC lists and add contacts whose numbers should be excluded from dial list of outbound campaign.

When a campaign is initiated, the system checks dial list against the DNC list based on the number matching rule configured in **Contacts > Company Contacts > Options**, and skips calls to any matched DNC numbers.

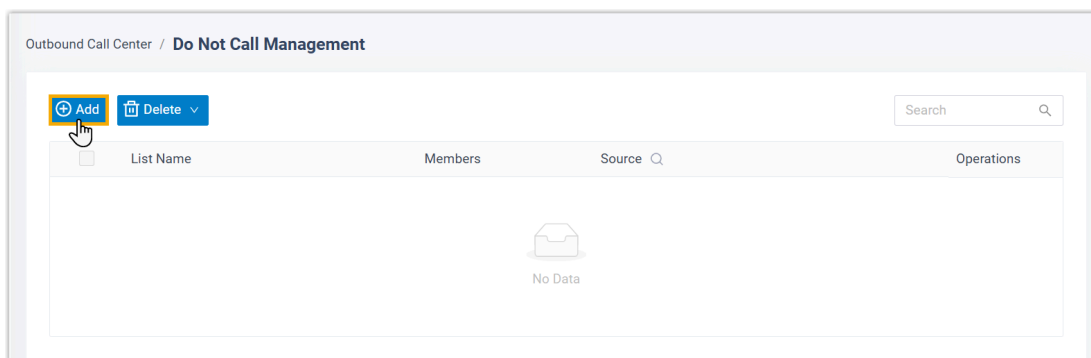
You can add contacts to a DNC list using the following methods:

Method	Description
Manually entry	Add DNC contacts one by one via manual entry.
File importing	Upload a CSV file to import DNC contacts. <div>  Note: You can export a DNC list as a template to start with. For more information, see Export and Import a DNC List. </div>
Read from honebook	Group the target contacts into a PBX-native phonebook or synchronize from third-party system. <div>  Note: <ul style="list-style-type: none"> • Before you begin, make sure the desired DNC contacts are saved in a phonebook. • DNC lists associated with phonebooks are read-only. Neither you nor agents can add contacts to them. </div>

For more information about creating a DNC list, refer to the instructions below.

Procedure

1. Log in to PBX web portal, go to **Outbound Call Center > Do Not Call Management**.
2. On the top of the list, click **Add**.



3. In the **Basic** section, complete the basic settings.

▼ **Basic**

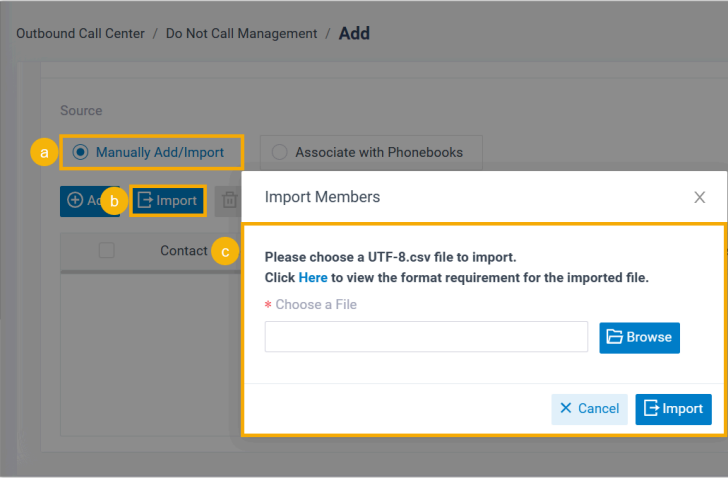
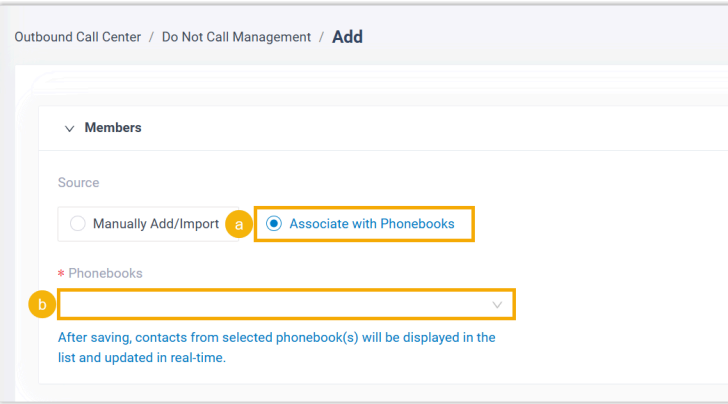
* **Name**

a

b ☐ Select by default when creating an outbound campaign

- a. In the **Name** field, enter a name to help you identify the DNC list.
 - b. **Optional:** To select the DNC list by default when creating an outbound campaign, select the checkbox of **Select by default when creating an outbound campaign**.
4. In the **Members** section, add DNC contacts.

Scenario	Description
Manually add DNC contacts	<p>a. In the Source section, select Manually Add/Import.</p> <p>b. Click Add.</p> <p>c. In the pop-up window, fill in contact details, then click Save.</p>

Scenario	Description
Import DNC contacts (CSV file)	 <p>a. In the Source section, select Manually Add/Import.</p> <p>b. Click Import.</p> <p>c. In the pop-up window, click Browse to select and upload a CSV file, then click Import.</p>
Read DNC contacts from phonebooks	 <p>a. In the Source section, select Associate with Phonebooks.</p> <p>b. In the Phonebooks drop-down list, select phonebook(s).</p>

5. Click **Save**.


Result





The DNC list is successfully created and displayed on the list.



Note:

If the DNC list is set as default for new campaigns, it will be tagged with .



<input type="checkbox"/>	List Name	Members	Source 🔍	Operations
<input type="checkbox"/>	 Demo	2	Associate with Phonebooks	  

Total: 1 < 1 > 20 / page ▾

What to do next

Go to **Outbound Call Center > Campaign Management** to configure DNC-related settings.

1. Assign the DNC list to a new or an existing campaign.

Go to **Contacts > Do Not Call**, then select the desired DNC lists from the drop-down list of **Select DNC Lists**.

Outbound Call Center / Campaign Management / Add

Basic Call Rules **Contacts**

Contact Sorting

* Sort By

By First Name ▾

* Sort By

Ascending ▾

Do Not Call

Select DNC Lists

Test x ▾

☐ Allow Agent to Add Contacts to DNC Lists

When a campaign is initiated, the system checks dial list against the assigned DNC list(s) based on the number matching rule configured in **Contacts > Company Contacts > Options**, and skip calls to any matched DNC numbers.



Note:

How numbers are matched depending on the rule you configure:

- **Do Not Match** or **Exact Match**: A number is regarded as DNC number only if it exactly matches an entry in the DNC list.
- **Match the last {number} digits**: A number is regarded as a DNC number if its last {number} digits matches an entry in the DNC list.

2. **Optional**: Grant permission to allow agents to add contacts to DNC list during campaign calls.

Select the checkbox of **Allow Agent to Add Contacts to DNC Lists**, then select the allowed DNC list(s).



Note:

Agents can edit **ONLY** the DNC lists that are manually added or imported, but cannot modify those associated with phonebooks.

Delete DNC Lists

This topic describes how to delete DNC lists from Yeastar P-Series Software Edition.

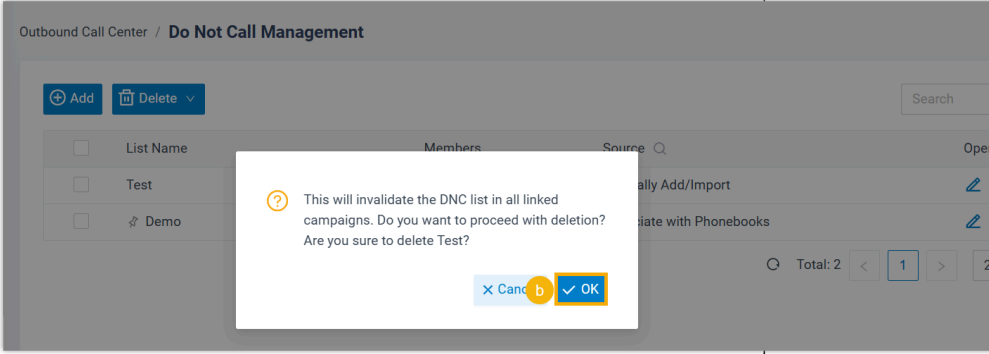
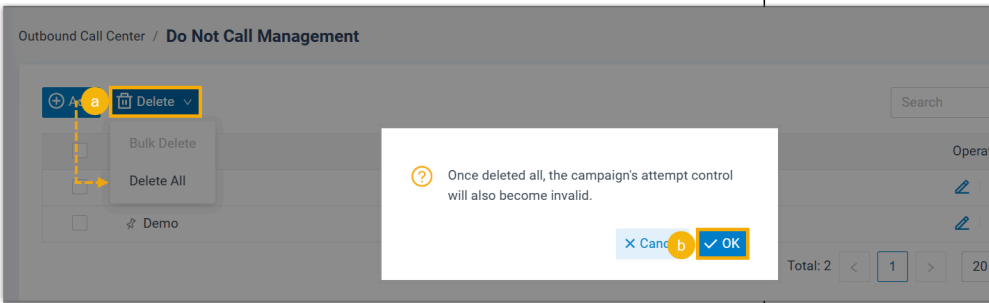


Note:

For DNC lists that are currently assigned to an ongoing campaign where agents are allowed to modify the list, you can NOT delete it until the campaign ends.

Procedure

1. Log in to PBX web portal, go to **Outbound Call Center > Do Not Call Management**.
2. Delete DNC list(s) as needed.

Scenario	Description
Delete a DNC list	 <p>a. Click  beside the desired DNC list.</p> <p>b. In the pop-up window, click OK.</p>
Bulk Delete DNC lists	 <p>a. Select the checkboxes of the desired DNC lists.</p> <p>b. Click Delete, then select Bulk Delete from the drop-down list.</p> <p>c. In the pop-up window, click OK.</p>
Delete all DNC lists	 <p>a. Click Delete, then select Delete All from the drop-down list.</p> <p>b. In the pop-up window, click OK.</p>


Result

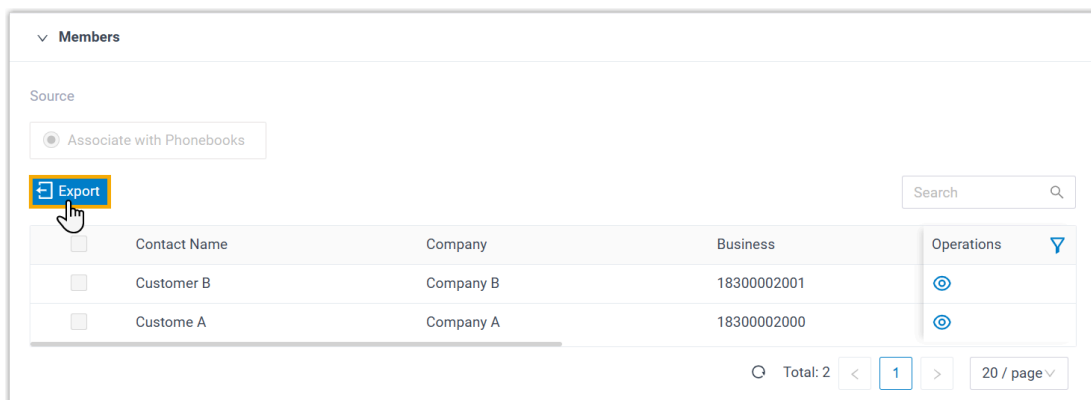
The DNC list(s) are deleted from the PBX. Numbers in the DNC list(s) will be called if they are included in an outbound campaign's dial list.

Export and Import a DNC List

The DNC lists configured on Yeastar P-Series Software Edition can be exported and saved as a template. You can fill in desired contact information in the exported file, and import the file to PBX again. This topic describes how to export and import a DNC list.

Export a DNC list

1. Log in to PBX web portal, go to **Outbound Call Center > Do Not Call Management**.
2. On the right of the desired DNC list, click .
3. In the **Members** section, click **Export**.



A CSV file is saved to your computer. To check and edit parameters in the CSV file, see [Contacts Parameters](#).

Import a DNC list

We recommend that you export DNC contacts data to a CSV file first, and use the file as a template to start with. In this way, you can save time and effort.

Prerequisites

Requirements of an imported file:

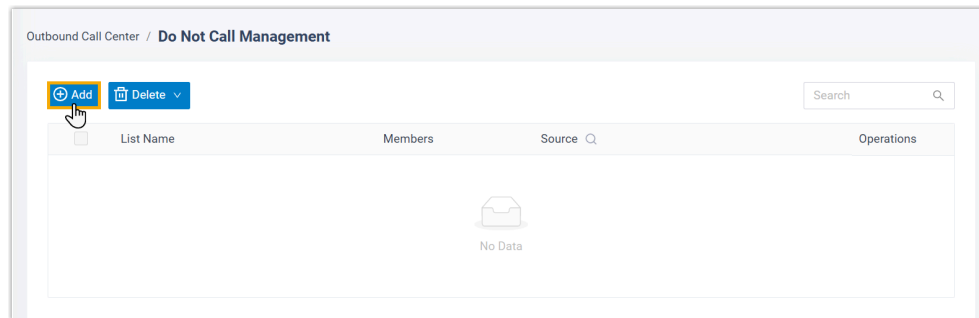
- **Format:** UTF-8.CSV
- **Size:** Less than 300 MB
- **File name:** Less than 127 characters

- **Import parameters:** Ensure that the import parameters meet requirements.

For more information, see [Contacts Parameters](#).

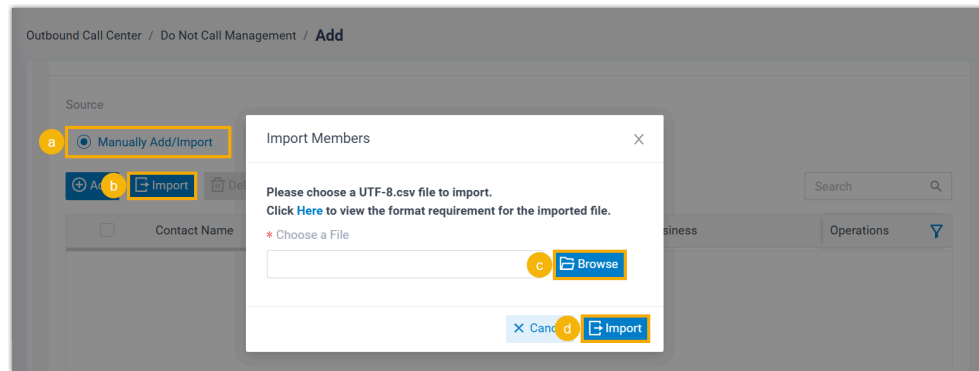
Procedure

1. Log in to PBX web portal, go to **Outbound Call Center > Do Not Call Management**.
2. On the top of the list, click **Add**.



3. In the **Basic** section, complete the basic settings.

- a. In the **Name** field, enter a name to help you identify the DNC list.
 - b. **Optional:** To select the DNC list by default when creating an outbound campaign, select the checkbox of **Select by default when creating an outbound campaign**.
4. In the **Members** section, import DNC contacts.



- a. In the **Source** section, select **Manually Add/Import**.
- b. Click **Import**.
- c. In the pop-up window, click **Browse** to select and upload a CSV file, then click **Import**.
- d. Click **Save**.

Attempt Controls

Configure an Attempt Control Rule

Attempt Controls allow you to restrict the number of call attempts to a contact or phone number, either within a specified period or in total, which helps you stay compliant with local regulations on outbound calling. This topic describes how to configure an attempt control rule.

Requirements and restrictions

Requirements

PBX's firmware version is 83.20.0.21 or later.

Restrictions

- A maximum number of **20** attempt control rules can be created.
- Attempt control rules only apply to campaigns with dial list sourced from **phonebooks**.



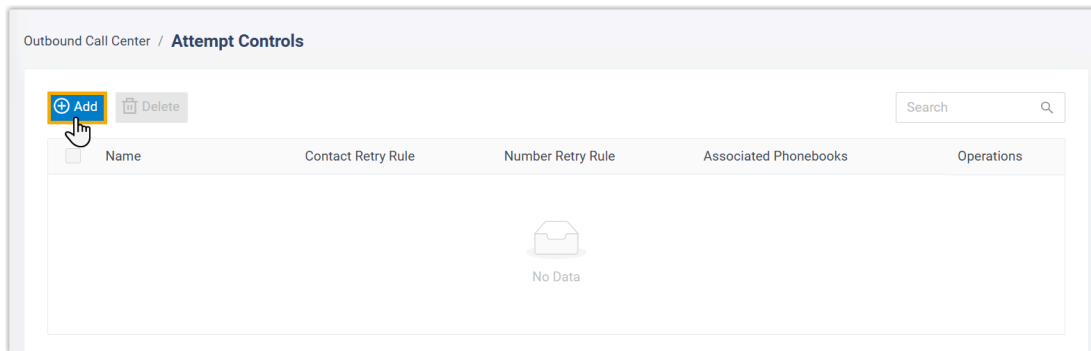
Note:



To apply attempt control rules to campaigns with dial list sourced from **CSV file**, you **MUST** first import the contacts into a phonebook, and then create an attempt control rule to associate with that phonebook.

Procedure

1. Log in to PBX web portal, go to **Outbound Call Center > Attempt Controls**.
2. On the top of the list, click **Add**.



3. In the pop-up window, configure the rule, then click **Save**.

Add
✕

* Name

* Reset Period

Daily Reset ▼

Max Attempt Per Contact

3 ▼

Max Attempt Per Number


3 ▼

Associated Phonebooks

▼

✕ Cancel
Save

Setting	Description
Name	Enter a name to help you identify the rule.
Reset Period	<p>Set the reset period for call attempts.</p> <ul style="list-style-type: none"> • Daily Reset: Reset attempt count at 00:00 every day based on the default time zone. • Monthly Reset: Reset attempt count at 00:00 on the 1st day of each month based on the default time zone. • Custom: Reset attempt count after a custom countdown. If you choose this option, enter a value between 1 and 999 in the Period(h) field. The countdown starts from the time of the first call attempt. • Never Reset: Never reset attempt count. <p>Once the limit is reached, the system stops calling the contact or number.</p>

Setting	Description
Max Attempt Per Contact	Set the maximum number of times each contact in the specified phonebooks can be dialed across all campaigns that use these phonebooks as the dial list.
Max Attempt Per Number	<p>Set the maximum number of times that the specified phone numbers in the specified phonebooks can be dialed across all campaigns that use the phonebooks as the dial list.</p> <div>  Note: Since attempt control rules apply only to outbound campaigns with dial list sourced from phonebooks, the system determines whether two numbers are considered identical based on the contact number matching rule configured in Contacts > Company Contacts > Options. <ul style="list-style-type: none"> • Do Not Match or Exact Match: Two numbers are regarded as identical only if they are exactly the same. • Match the last {number} digits: Two numbers are regarded as identical if their last {number} digits match. </div>
Associated Phonebooks	Select phonebook(s) to which the attempt control rule will be applied.

Result

The attempt control rule is applied across all dialer campaigns that use the specified phonebooks as the dial list.

Supervisor Guide

Outbound Call Center Supervisor Guide

This guide provides step-by-step procedures on how you can monitor outbound call campaigns and manage outbound queue agents on the intuitive dashboards **Campaign Wallboard**.

Audience

This guide is intended for outbound call center managers (supervisors) with responsibilities that include managing and monitoring the performance of outbound call campaigns and agents.

Management tool

Yeastar P-Series Software Edition provides **Campaign Wallboard** on Linkus Web Client and Desktop Client, allowing queue manager to monitor real-time campaign details and campaign metrics, as well as managing outbound queue agents status. For more information, see [View Outbound Campaign Details on Wallboard](#)

View Outbound Campaign Details on Wallboard

Yeastar Outbound Call Center provides a campaign wallboard for outbound call center managers on Linkus Web Client and Desktop Client to see statistics and other details of a specific active outbound campaign.

Requirements

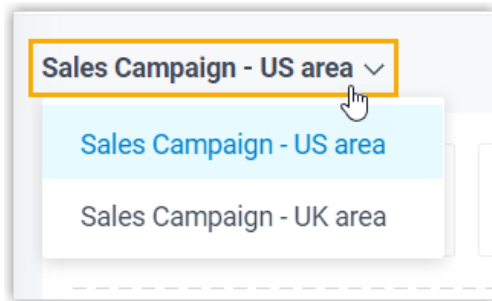
- **PBX Server:** Version 83.20.0.21 or later
- **Linkus Desktop Client:** Version 1.10.2 or later

Prerequisites

- You are a queue manager of one or multiple outbound queues.
- You have the permission to access Linkus Web Client or Desktop Client.

Procedure

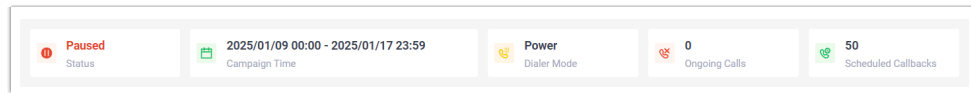
1. Log in to Linkus Web Client or Desktop Client, go to **Outbound Call Center > Campaign Wallboard**.
2. At the top-left corner of the wallboard, select the campaign the you want to check.



3. Check the campaign details as needed.
 - [Campaign overview](#)
 - [Key metrics](#)
 - [Call logs](#)
 - [Call results](#)
 - [Agent list](#)

Campaign overview

Provides the basic information of the campaign.

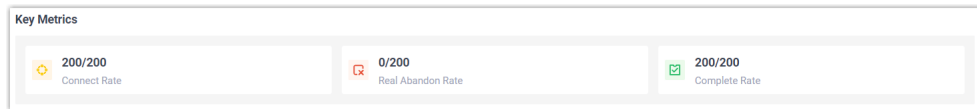


Widget	Description
Status	<p>The current status of the campaign.</p> <ul style="list-style-type: none"> 🟡 : To be improved. The contacts list is empty and needs to be completed. 🟢 : To be Started. The campaign will start at a scheduled time. 🟢 : In Progress. The campaign is in progress. 🔴 : Paused. The campaign is paused.
Campaign Time	The start and end time of the campaign.
Dialer Mode	The type of dialer used in the campaign.

Widget	Description
Ongoing Calls	The number of calls that are still in progress or not yet completed.
Scheduled Callbacks	The number of callbacks scheduled by agents.

Key Metrics

Provides an overview of key metrics that are essential for evaluating campaign performance.



Metric	Description
Connect Rate	<p>The rate at which calls are successfully connected to the contacts, which reflects the validity of the phone numbers.</p> <p>Formula: Number of calls the contacts has answered / Total number of calls dialed</p>
Real Abandon Rate	<p>The rate at which contacts abandon the call before being answered by an agent.</p> <p>Formula: Number of call abandoned by contacts / Total Number of calls routed to the queue</p>
Complete Rate	<p>The rate at which calls are successfully completed, which reflects the completing efficiency of the campaign.</p> <p>Formula: Number of dialed contacts / Total number of contacts</p>

Call logs

Displays the list of contacts to be dialed, the real-time records and details of campaign calls, categorized by the following statuses, and the DNC contacts added by agents.

Call Logs

Waiting to Dial

Ringing

Talking

Already Dialed



Scheduled Callback

Do Not Call

Refresh Every 10 min.

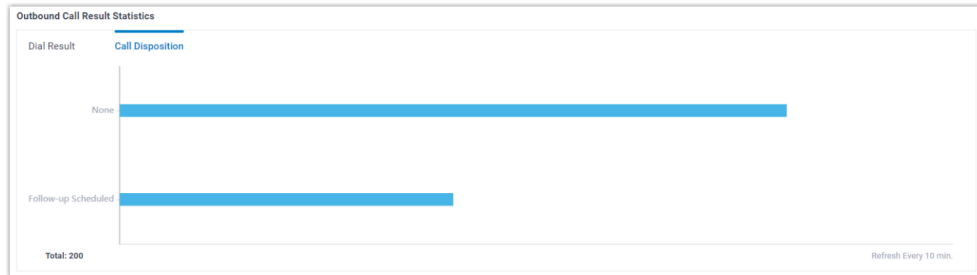
Search

Time	Name	Number	Agent	Dial Result	Call Disposition	Remark	Details
2025/01/09 16:04:39	Company A Custo...	1555121007	661262	C-Completed	Follow-up Scheduled	Need to follow up	
2025/01/09 16:04:38	Company A Custo...	1555121006	661261	C-Completed			
2025/01/09 16:04:38	Company A Custo...	1555121005	661265	C-Completed			

Status	Description
Waiting to Dial	The list of contacts waiting to be dialed.
Ringing	The calls that are in ringing status.
Talking	The calls that are currently in progress.
Already Dialed	<div>Calls that have been dialed, either succeeded or not.</div> <div><div></div><div>Note: You can click  beside the call log to check the call details.</div></div>
Scheduled Callback	The callbacks requested by agents in the campaign.
Do Not Call	The DNC contacts added by agents in the campaign.

Outbound Call Result Statistics

Provides statistics on the outbound campaign calls, including dial results and call dispositions, to give insight into the effectiveness of the campaign.



Item	Description
Dial Result	The dialing outcomes generated during the campaign. It is automatically generated by the system and indicates the status of calls, such as C for completed (successful connection), F for failed, or other predefined statuses.
Call Disposition	The statistics for codes logged by agents for the calls during the campaign.

Agent list

Displays the list of agents serve for the campaign. You can quickly search desired agents, or switch the status for agents (log in/out and pause/unpause) directly on this panel.

The screenshot displays a call center agent management interface. At the top left, it shows 'Agent (48/50)' with a headset icon. A search bar with a magnifying glass icon is located at the top right, with an orange callout bubble labeled 'Search' pointing to it. The interface lists three agents, each with a colored circle containing the number '1' and a green checkmark icon.

- Agent 1 (Red):** ID 15901000. Below the ID is a status box with a person icon and the text 'Logged out 202...'. An orange callout bubble labeled 'Agent status switch' points to this status box.
- Agent 2 (Green):** ID 15921000. Below the ID is a status box with a person icon and the text 'Static Agents'.
- Agent 3 (Blue):** ID 15901001. Below the ID is another ID, 15901001.

Agent Guide

Outbound Call Center Agent Guide

This guide provides guidance on how to manage your availability status in outbound queues, and process outbound campaign calls using a unified agent portal available on web, desktop, and mobile devices.

Audience

This guide is intended for agents who handle outbound campaign calls to communicate with customers.

Agent portal

To enhance communication mobility and improve agent productivity, the Yeastar Outbound Call Center provides a unified agent portal integrated into the Linkus UC Clients that is available on desktop and web-based platforms. Agents can efficiently handle outbound campaign calls anytime anywhere through the following Linkus UC clients.

Supported Client	Description
Linkus Web Client / Desktop Client	<p>The Linkus Web Client and Desktop Client allow agents to access the outbound call center functionalities through an intuitive workspace Inbox for efficient outbound campaign call management.</p> <ul style="list-style-type: none">• For outbound campaign call-related operational instructions on Linkus Web Client, see Agent Operations on Web Client / Desktop Client.• For more information about utilizing Linkus Web Client or Desktop Client, see Linkus Web Client User Guide or Linkus Desktop Client User Guide.
Linkus Mobile Client	<p>Available as a mobile application, Linkus Mobile Client provides agents with access to essential call features, allowing them to handle outbound campaign calls and update their availability status from their mobile devices, ensuring that agents can stay connected and responsive on the go.</p> <ul style="list-style-type: none">• For outbound campaign call-related operational instructions on Linkus Mobile Client, see Agent Operations on Mobile Client.

Supported Client	Description
	<ul style="list-style-type: none"> For more information about utilizing Linkus Mobile Client, see Linkus Mobile Client User Guide.

Agent Operations on Web Client / Desktop Client

Access Inbox

This topic provides an overview on the outbound call center dashboard **Inbox** on Linkus Web Client, designed for outbound queue agents to handle campaign calls, and describes how to access the dashboard.

Background information

Yeastar Outbound Call Center provides an intuitive dashboard **Inbox** for agents to handle campaign calls. The layout of the dashboard as well as corresponding descriptions are shown below.

Caller List

Wrap-up 00:00:27
Customer B
818300002001

Waiting 00:00:37
Customer D
818300002003

Call Disposition

Campaign Name: Sales Campaign

Select Call Disposition
▼

Remark

Callback Registration

☐ No need to call back ☒ Need to call back

Callback Time
2025/02/21 16:17:58

Callback Number
18300002001

☐ Direct to me

Remark

Customer Information

Customer D

Contact Details Address

Email
sample4@gmail.com

Company
Company Example

Business
18300002003

Switch Agent Status
Agent Status Switch

Save

Component	Description
Caller List	Displays the campaign calls routed to the agent, including ongoing calls and calls waiting to be answered. Agents can answer, hold, or hangup these calls directly from this list.
Agent Status Switch	Allows agents to switch their status in a specific outbound queue, ensuring proper availability for campaign calls.
Call Disposition	Allows agents to efficiently categorize call outcomes using predefined disposition codes, schedule callbacks, add remarks related to the current call, and add contacts to Do Not Call (DNC) list.
Customer Information	Shows detailed information about the contact, providing agents with the essential context for efficient call handling.

Prerequisites

- You have the permission to access Linkus Web Client or Linkus Desktop Client.
- The version of Linkus Desktop Client is **1.10.2** or later.
- You have get username and password as well as the server's network information from your system administrator.

Procedure

1. Log in to Linkus Web Client or Desktop Client.



Tip:


If you have received a Linkus welcome email, you can click the login link for Web Client or Desktop Client to quickly log in.

Log in to Linkus Web Client

- a. Launch your web browser, enter the IP address or domain of Linkus Web Client, press **Enter**.
- b. Enter your username and password, then click **LOG IN**.
 - **Username:** Extension number or Email address.
 - **Password:** The password associated with the username.

Log in to Linkus Desktop Client

- a. Open Linkus Desktop Client.
- b. Enter the login information, then click **LOG IN**.
 - **Username:** Extension number or Email address.

- **Password:** The password associated with the username.
- **Domain:** Enter the domain name or click  to enter the IP addresses and ports.

2. Go to **Outbound Call Center > Inbox**.

Related information

[Handle Campaign Calls on Inbox](#)

Handle Campaign Calls on Inbox

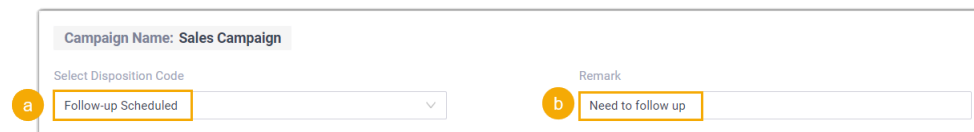
This topic describes how an agent can handle a campaign call on **Inbox** in Linkus Web Client or Desktop Client.

Procedure

1. On Linkus Web Client or Desktop Client, go to **Outbound Call Center > Inbox**.
2. Handle a campaign call according to your needs.

Handle call position

In the **Call Disposition** section, you can efficiently mark the call outcomes by selecting predefined disposition codes.



Campaign Name: Sales Campaign

Select Disposition Code

Remark

a. Follow-up Scheduled

b. Need to follow up

- a. In the **Select Disposition Code** drop-down list, select a disposition code to mark the outcome of the call.
- b. **Optional:** In the **Remark** field, enter a short description about this call.

Schedule a callback

In the **Callback Registration** section, you can schedule a callback during an active campaign call or the wrap-up time. The system will call the contact again at a scheduled time.

Call Disposition

Campaign Name: Sales Campaign

Select Disposition Code: Follow-up Scheduled

Remark: Need to follow up

Callback Registration

☐ No need to call back **a** ☒ Need to call back **b**

Callback Time: 2025/01/09 16:10:39

Callback Number: 1555121007

☐ Direct to me

Remark: Customer 3 that needs to follow up

Save

- a. Select **Need to call back**.
- b. Configure the callback settings.

Setting	Description
Callback Time	Specify the time for the callback request.
Callback Number	Select the contact's number to be dialed.
Direct to me	Decide whether to route the callback right to you. If enabled, the callback will wait for you to become available until timeout.
Remark	Enter a short description for the callback.

Add to DNC List



Note:

This option is available only if the administrator has granted you permission, and is limited to calls that do not require a callback.

You can add the contact to a DNC list during an active campaign call. If a campaign is currently running and uses that DNC list, the system will skip calling the contact in that campaign.

☒ Add to DNC List

Number Range: Add current number only

DNC Remark:

* Target List: Demo

- a. Select the checkbox of **Add to DNC List**.
- b. Configure the DNC settings.

Setting	Description
Number Range	Select an option to add current number or all numbers of the contact to DNC list.
DNC Remark	Enter a short description for the DNC contact.
Target List	Select the DNC list to add the contact.

3. Click **Save**.

Manage Agent Status

Manage Your Status in Queues

As an agent of a queue or multiple queues, you can change your own status in a specific queue or in all queues on Linkus Web Client or Desktop Client. This topic describes how to log in to and out of queues, pause and unpause queue calls.

Log in to queues

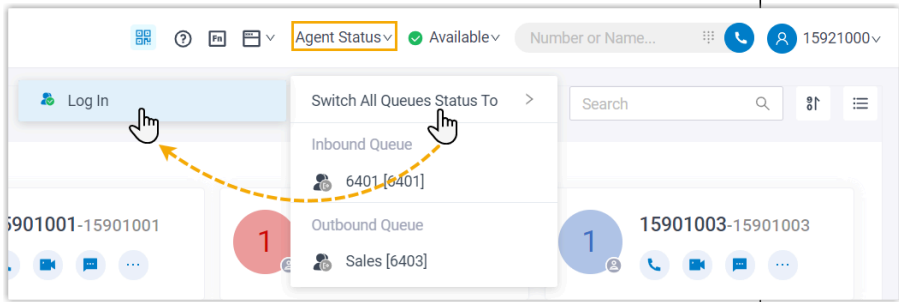


Note:

This operation is only available for dynamic agents.

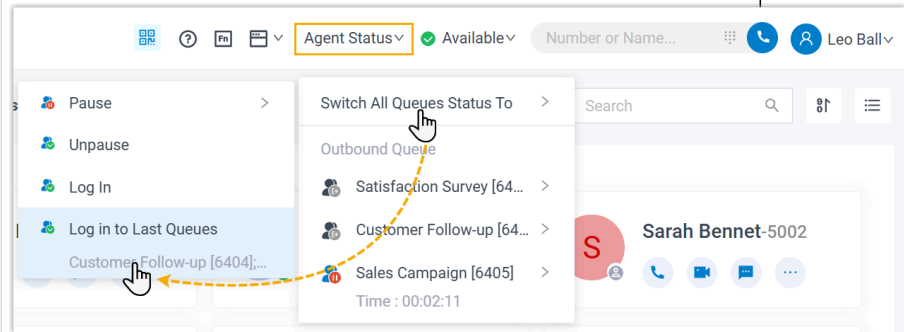
Log in to all queues

You can log in to all queues by either of the following methods.

Method	Instruction
Log in to all queues from Toolbar	 <ol style="list-style-type: none"> 1. In the top navigation bar of Linkus Web Client or Desktop Client, click Agent Status. 2. Hover your mouse over Switch All Queue Status To. 3. Click Log In.
Log in to all queues using feature code	<ol style="list-style-type: none"> 1. Obtain the Log In to All Queues feature code from the system administrator. 2. Dial the feature code. <p>For example, if the feature code is *77, simply dial *77 to log in to all queues you are assigned to.</p>

Log in to all previously logged-in queues

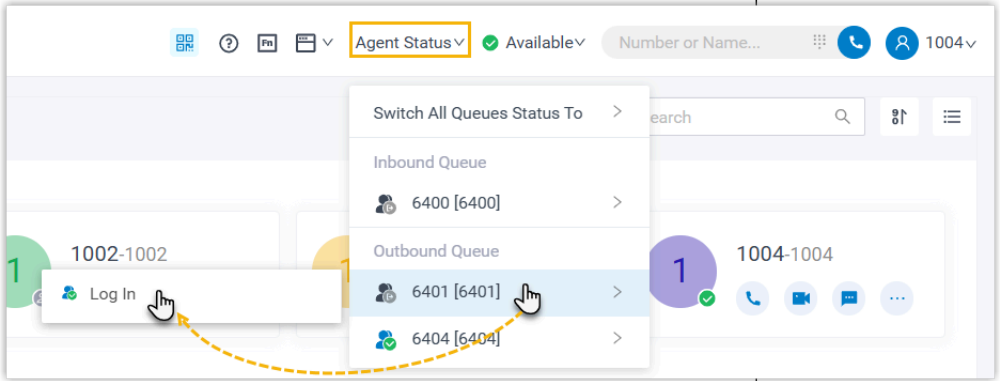
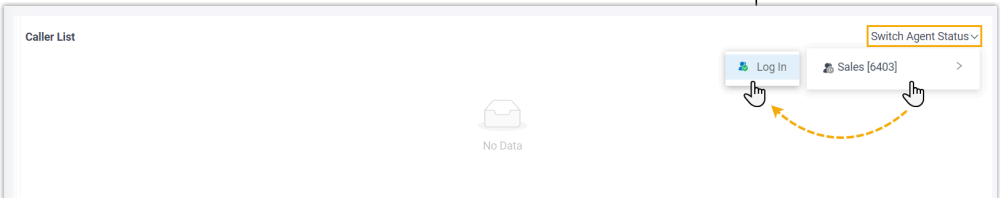
You can log in to all queues you were previously logged in to by either of the following methods, without needing to select each queue manually.

Method	Instruction
Log in to last logged-in queues from Toolbar	 <ol style="list-style-type: none"> 1. In the top navigation bar of Linkus Web Client or Desktop Client, click Agent Status. 2. Hover your mouse over Switch All Queue Status To. 3. Click Log in to Last Queues.
	<ol style="list-style-type: none"> 1. Obtain the Log in to Last Queues feature code from the system administrator.

Method	Instruction
Log in to last logged-in queues using feature code	<p>2. Dial the feature code.</p> <p>For example, if the feature code is *78, simply dial *78 to log in to all queues you previously logged in to.</p>

Log in to a specific queue

You can log in to a specific queue by any of the following methods:

Method	Instruction
Log in to a specific queue from Toolbar	 <ol style="list-style-type: none"> 1. In the top navigation bar of Linkus Web Client or Desktop Client, click Agent Status. 2. Hover your mouse over the desired queue. 3. Click Log In.
Log in to a specific queue from Inbox	 <ol style="list-style-type: none"> 1. In the Linkus Web Client or Desktop Client, go to Outbound Call Center > Inbox. 2. In the top-right corner of the Caller List, select a desired queue, then click Log In.
Log in to a specific queue using feature code	<ol style="list-style-type: none"> 1. Obtain the Log in/Log out feature code from the system administrator. 2. Dial the feature code. <p>For example, if the feature code is *7, to log in to queue 6400, simply dial *76400.</p>

Log out of queues

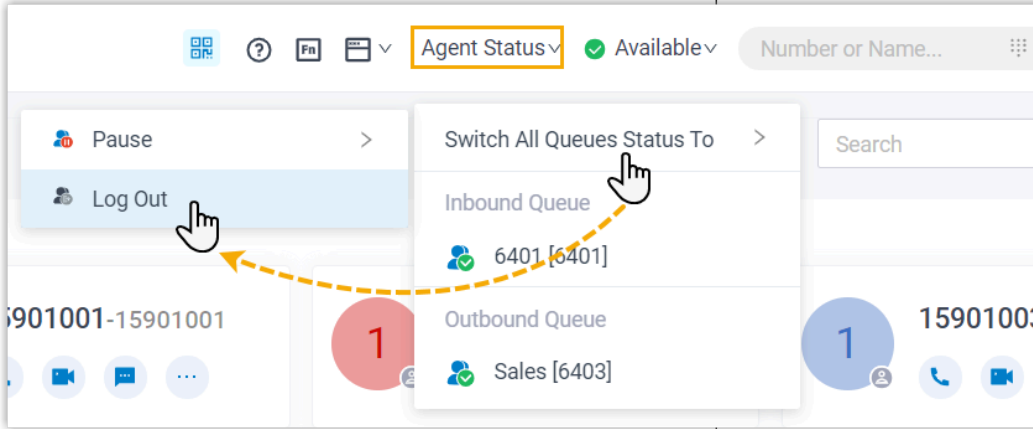


Note:

This operation is only available for dynamic agents.

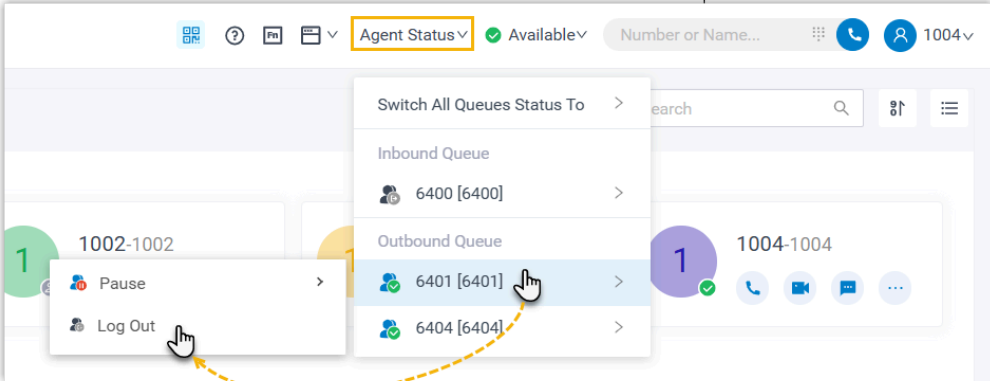
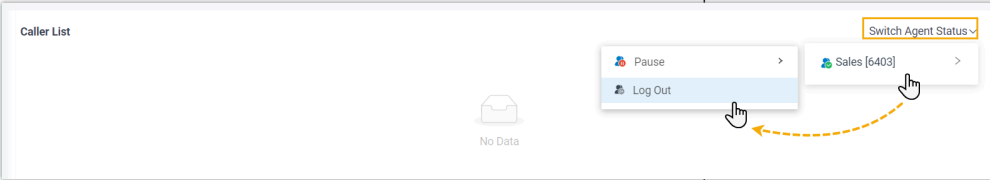
Log out of all queues

You can log out of all queues by either of the following methods:

Method	Instruction
Log out of all queues from Toolbar	 <ol style="list-style-type: none"> 1. In the top navigation bar of Linkus Web Client or Desktop Client, click Agent Status. 2. Hover your mouse over Switch All Queue Status To. 3. Click Log Out.
Log out of all queues using feature code	<ol style="list-style-type: none"> 1. Obtain the Log Out of All Queues feature code from the system administrator. 2. Dial the feature code. <p>For example, if the feature code is *077, simply dial *077 to log out of all queues you are assigned.</p>

Log out of a specific queue

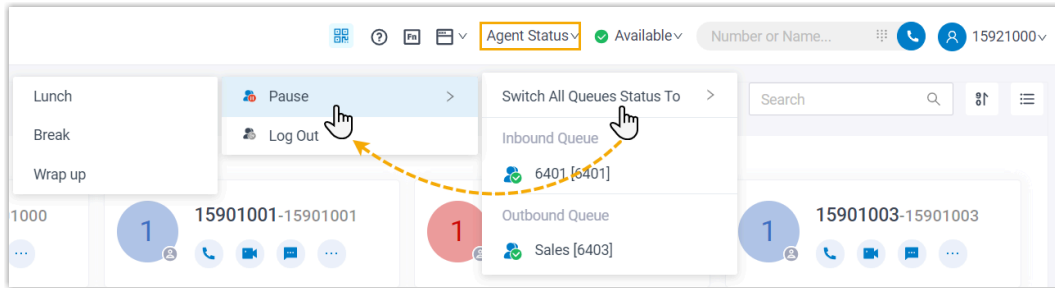
You can log out of a specific queue by any of the following methods:

Method	Instruction
Log out of a specific queue from Toolbar	 <ol style="list-style-type: none"> 1. In the top navigation bar of Linkus Web Client or Desktop Client, click Agent Status. 2. Hover your mouse over the desired queue. 3. Click Log Out.
Log out of a specific queue from Inbox	 <ol style="list-style-type: none"> 1. In the Linkus Web Client or Desktop Client, go to Outbound Call Center > Inbox. 2. In the top-right corner of the Caller List, select a desired queue, then click Log Out.
Log out of a specific queue using feature code	<ol style="list-style-type: none"> 1. Obtain the Log in/Log out feature code from the system administrator. 2. Dial the feature code. <p>For example, if the feature code is *7, to log out of queue 6400, simply dial *76400.</p>

Pause queue calls

As a queue agent (be it static or dynamic), you can pause receiving the queue calls when you are away from desk. The queue will not distribute calls to you after you pause queue calls.

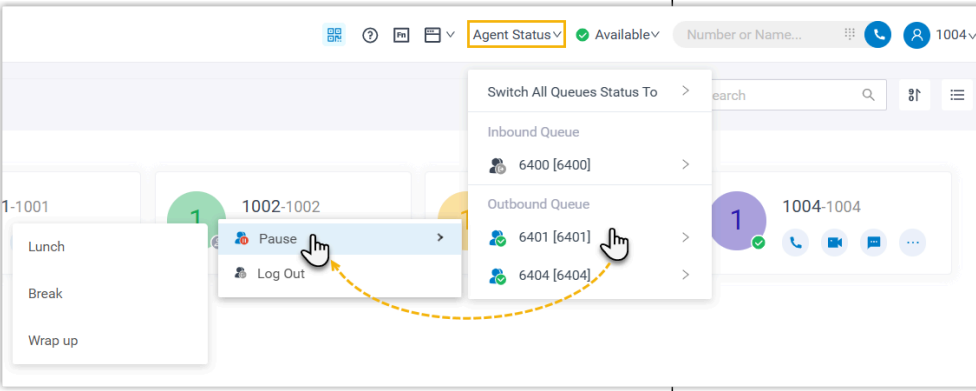
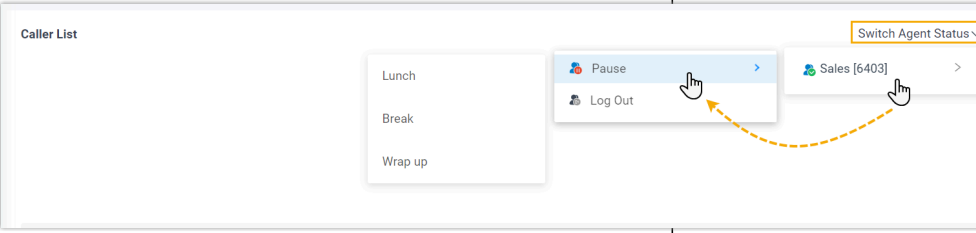
Pause service in all queues



1. In the top navigation bar of Linkus Web Client, click **Agent Status**.
2. Hover your mouse over **Switch All Queue Status To**.
3. Click **Pause**.
4. **Optional:** In the pause reason list, select a specific reason.

Pause service in a specific queue

You can pause service in a specific queue by any of the following methods:

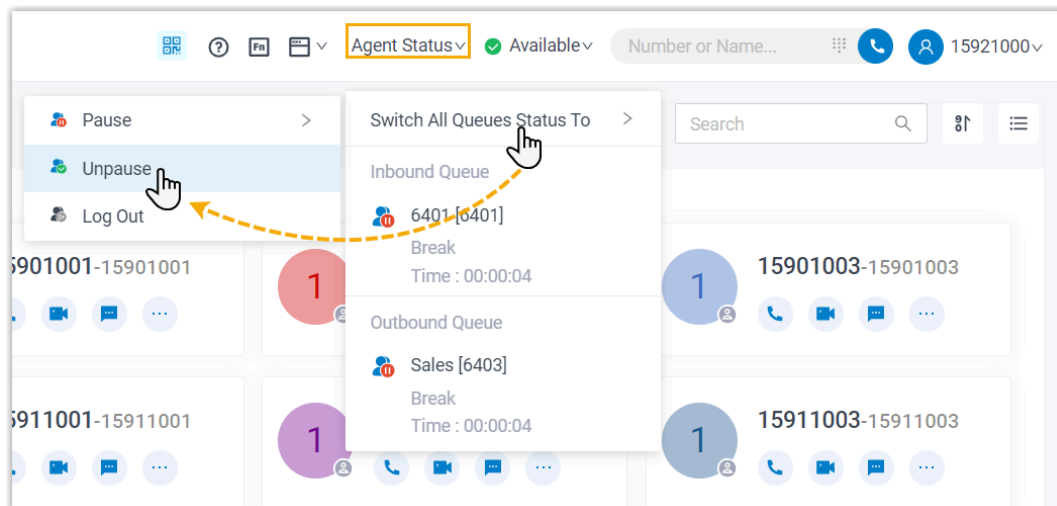
Method	Instruction
Pause service in a specific queue from Toolbar	 <ol style="list-style-type: none"> 1. In the top navigation bar of Linkus Web Client or Desktop Client, click Agent Status. 2. Hover your mouse over the desired queue. 3. Click Pause. 4. Optional: In the pause reason list, select a specific reason.
Pause service in a specific queue from Inbox	

Method	Instruction
	<ol style="list-style-type: none"> 1. In the Linkus Web Client or Desktop Client, go to Outbound Call Center > Inbox. 2. In the top-right corner of the Caller List, select a desired queue, then click Pause and select a pause reason as needed.
Pause service in a specific queue using feature code	<ol style="list-style-type: none"> 1. Obtain the Pause/Unpause feature code and the Pause Reason feature codes from the system administrator. 2. Dial the feature code. For example, if the Pause/Unpause feature code is *07, to pause service in queue 6400, do as follows: <ul style="list-style-type: none"> • To directly pause without reason, dial *076400. • To pause with specific reason, dial *076400 plus the pause reason feature code, e.g. *076400*03.

Unpause queue calls

As a queue agent (be it static or dynamic), you can resume receiving queue calls when you are ready to take a call.

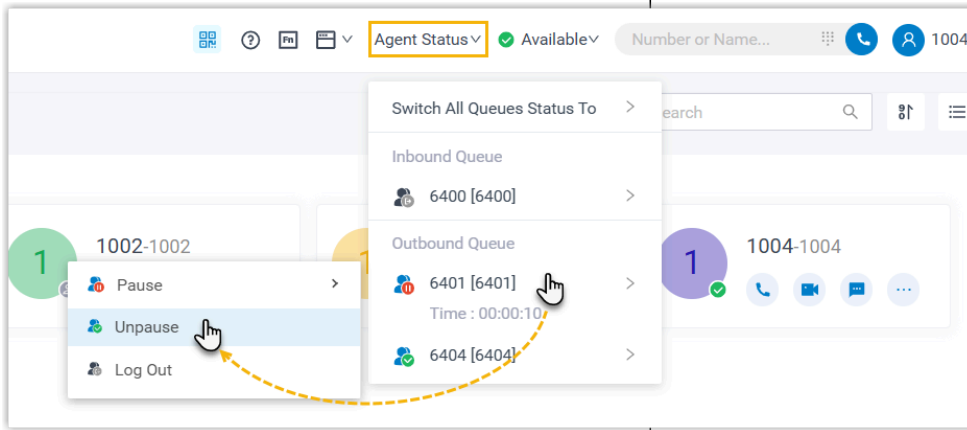
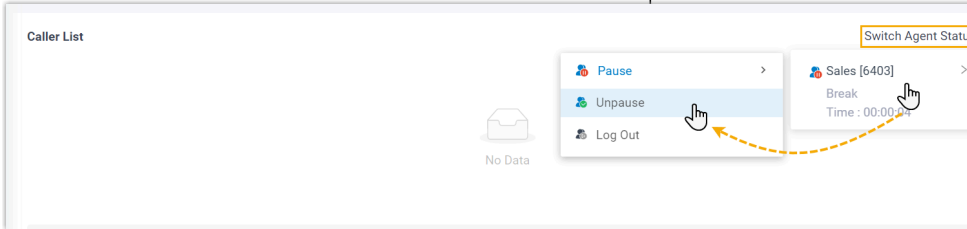
Unpause service in all queues



1. In the top navigation bar of Linkus Web Client, click **Agent Status**.
2. Hover your mouse over **Switch All Queue Status To**.
3. Click **Unpause**.

Unpause service in a specific queue

You can unpause service in a specific queue by any of the following methods:

Method	Instruction
Unpause service in a specific queue from Toolbar	 <ol style="list-style-type: none"> 1. In the top navigation bar of Linkus Web Client or Desktop Client, click Agent Status. 2. Hover your mouse over the desired queue. 3. Click Unpause.
Unpause service in a specific queue from Inbox	 <ol style="list-style-type: none"> 1. In the Linkus Web Client or Desktop Client, go to Outbound Call Center > Inbox. 2. In the top-right corner of the Caller List, select a desired queue, then click Unpause.
Unpause service in a specific queue using feature code	<ol style="list-style-type: none"> 1. Obtain the Pause/Unpause feature code from the system administrator. 2. Dial the feature code. <p>For example, if the feature code is *07, to unpause service in queue 6400, dial *076400.</p>

Related information

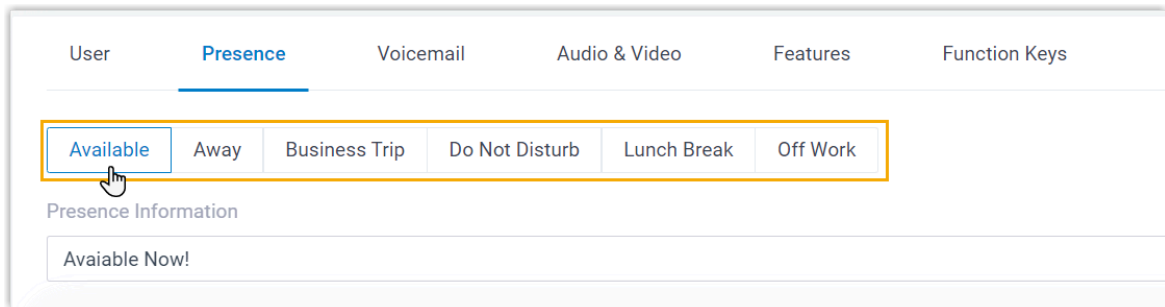
[Automatically Switch Agent Status Based on Extension Presence](#)

Automatically Switch Agent Status Based on Extension Presence



This topic describes how to set your agent status to automatically change along with your extension presence on Linkus Web Client or Desktop Client.

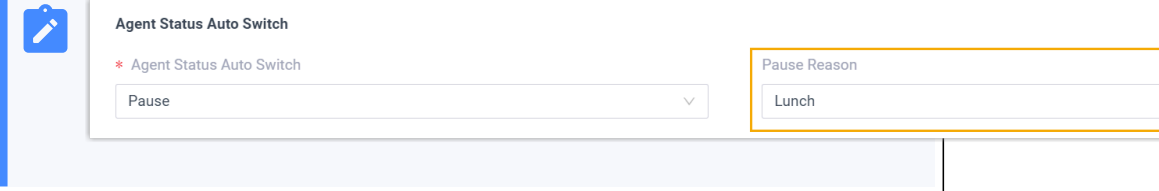
Procedure

1. Log in to Linkus Web Client or Desktop Client, go to **Preferences > Presence**.
2. On the status bar, select a presence status to edit.



3. Scroll down to the **Options** section, then select an action in the **Agent Status Auto Switch** drop-down list.

Option	Description
Log In	<p>When your extension changes to the presence status, you will automatically log in to all the queues to which you belong.</p> <ul style="list-style-type: none"> • Dynamic agent: Log in to the queues. • Static agent: Resume receiving calls from the queues.
Log in to Last Queues	<p>When your extension changes to the presence status, you will automatically log in to all previously logged-in queues.</p> <ul style="list-style-type: none"> • Dynamic agent: Log in to the queues. • Static agent: Resume receiving calls from the queues.
Log Out	<p>When your extension changes to the presence status, you will automatically log out from all the queues to which you belong.</p> <div>  Note: The logout operation is only available for dynamic agent. </div>
Pause	<p>When your extension changes to the presence status, you will automatically pause receiving queue calls.</p> <div>  Note: You can select a specific pause reason in the Pause Reason drop-down list. </div>

Option	Description
	 <p>Agent Status Auto Switch</p> <p>* Agent Status Auto Switch</p> <p>Pause</p> <p>Pause Reason</p> <p>Lunch</p>
Do Nothing	When your extension changes to the presence status, your agent status in the queues remains unaffected.

- To configure the agent status auto-switch for more presence status, repeat Step 2 - 3.
- Click **Save**.

Manage Outbound Queue Call Logs

This topic describes how to check and manage the outbound queue call logs on Linkus Web Client or Desktop Client.

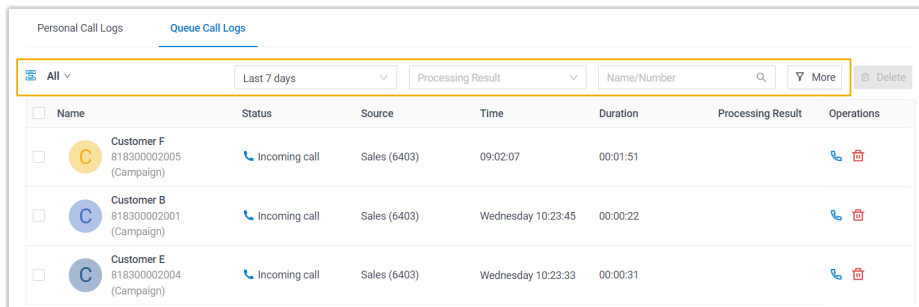
Requirements







System administrator has granted you the viewing permission of queue call logs.

Procedure

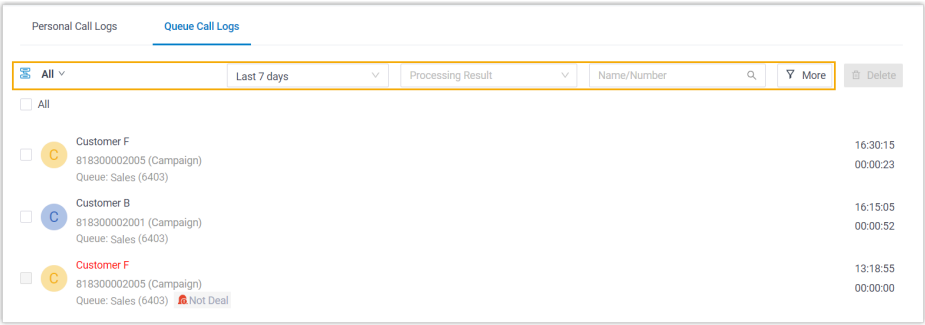
- Log in to Linkus Web Client or Desktop Client, go to **Call Logs > Queue Call Logs**.
- Optional:** At the top of the list, filter or search the desired call logs.

- Figure 1. **Linkus Web Client**





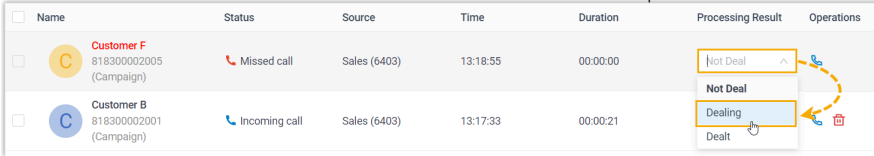

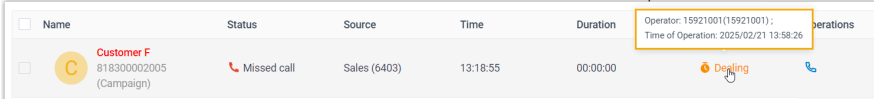
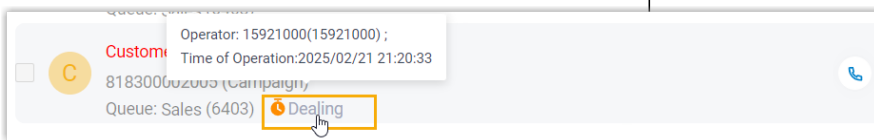
Personal Call Logs		Queue Call Logs					
All	Last 7 days	Processing Result	Name/Number	More	Delete		
<input type="checkbox"/> Name	Status	Source	Time	Duration	Processing Result	Operations	
<input type="checkbox"/> Customer F 818300002005 (Campaign)	Incoming call	Sales (6403)	09:02:07	00:01:51		 	
<input type="checkbox"/> Customer B 818300002001 (Campaign)	Incoming call	Sales (6403)	Wednesday 10:23:45	00:00:22		 	
<input type="checkbox"/> Customer E 818300002004 (Campaign)	Incoming call	Sales (6403)	Wednesday 10:23:33	00:00:31		 	

• **Figure 2. Linkus Desktop Client**



3. Manage the call logs according to your needs.

Operation	Instruction
Delete incoming queue call logs	<div><div><div><div><div></div><div>Note:</div></div><div>Only supports to delete the call logs of queue calls that you have answered.</div></div></div><div><div>You can delete incoming queue call logs via the following methods:</div><div><div><div>To delete a single call log, click  beside the call log.</div><div>To bulk delete call logs, select the checkboxes of the desired incoming call logs, then click Delete.</div></div><div><div></div><div>Figure 3. Linkus Web Client</div></div></div></div><div><div><div><div><div></div><div>Figure 4. Linkus Desktop Client</div></div></div><div><div>You can directly place a call from a call log via the following methods:</div></div></div></div></div>

Operation	Instruction
Place a call to the caller	<ul style="list-style-type: none"> Double click the desired call log. Click  beside the call log.
Change the processing status of a missed queue call	<p>If you decide to handle a missed queue call, or you have handled it, you can change the processing status of the missed queue call.</p> <ul style="list-style-type: none"> <p>Figure 5. Linkus Web Client</p>  <p>Figure 6. Linkus Desktop Client</p>  <p>a. Click the processing status beside the call log. b. In the drop-down list, select the desired one.</p> <p>The processing status is changed; All the authorized agents can see the change, and check the operation record by hovering mouse over the processing status.</p> <p>Figure 7. Linkus Web Client</p>  <p>Figure 8. Linkus Desktop Client</p> 

Agent Operations on Mobile Client

Handle Campaign Calls on Linkus Mobile Client

This topic describes how to handle campaign calls on Linkus Mobile Client.

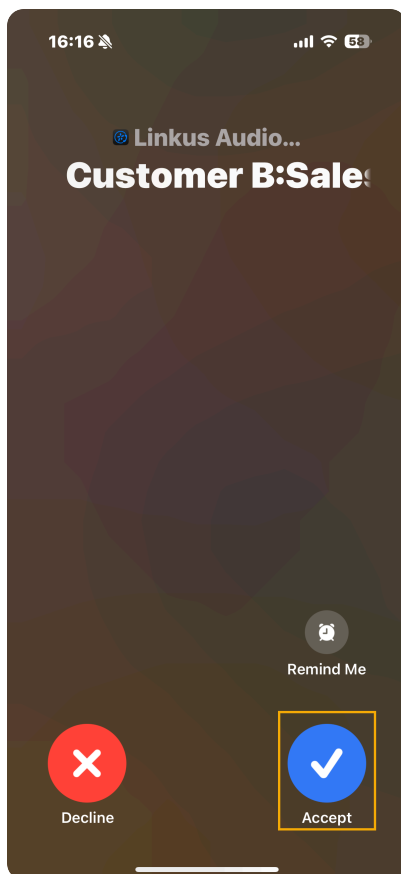
Prerequisites

- You have logged in to Linkus Mobile Client, and logged in to your outbound queue.
- Linkus Mobile Client is enabled in Ring Strategy (Path: **Account > Presence > ⋮ > Ring Strategy**).
- The **Call Waiting** feature is enabled (Path: **Account > Settings > Advanced > Call Waiting**).

Answer a call

If an incoming queue call reaches your extension while you are on Linkus Mobile Client, an incoming call notification appears.

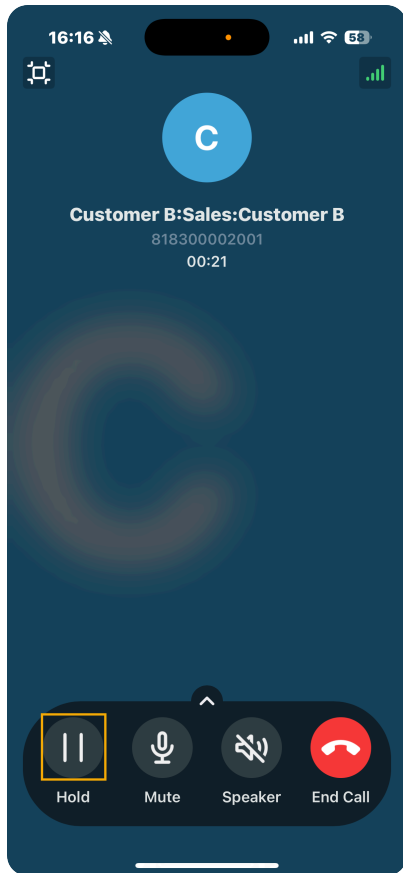
You can answer the call by tapping **Accept** (for iOS phone) or **Answer**(for Android phone).



Hold / resume a call

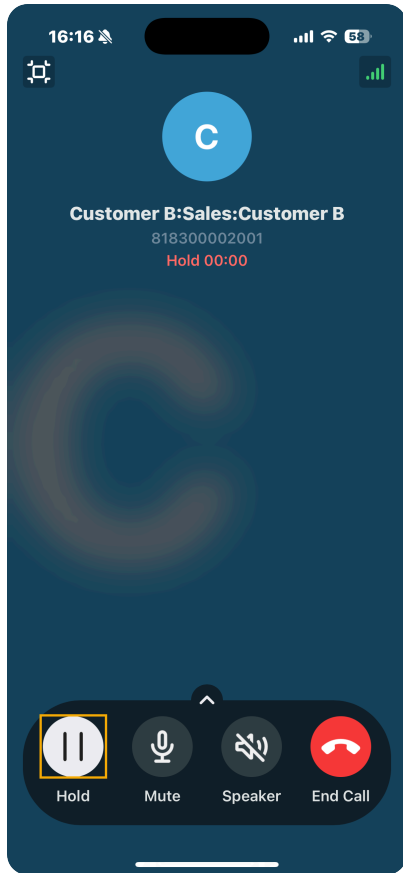
You can place a queue call on hold temporarily to gather information or consult with colleagues, and resume the call when you are ready.

- To put a call on hold, tap **||** (**Hold**) on the call screen during an active call.



The caller can not communication with you, and a pre-recorded audio file is played to the caller on hold.

- To resume the call, tap **||** (**Hold**) again on the call screen.



You and the caller can communication with each other now.

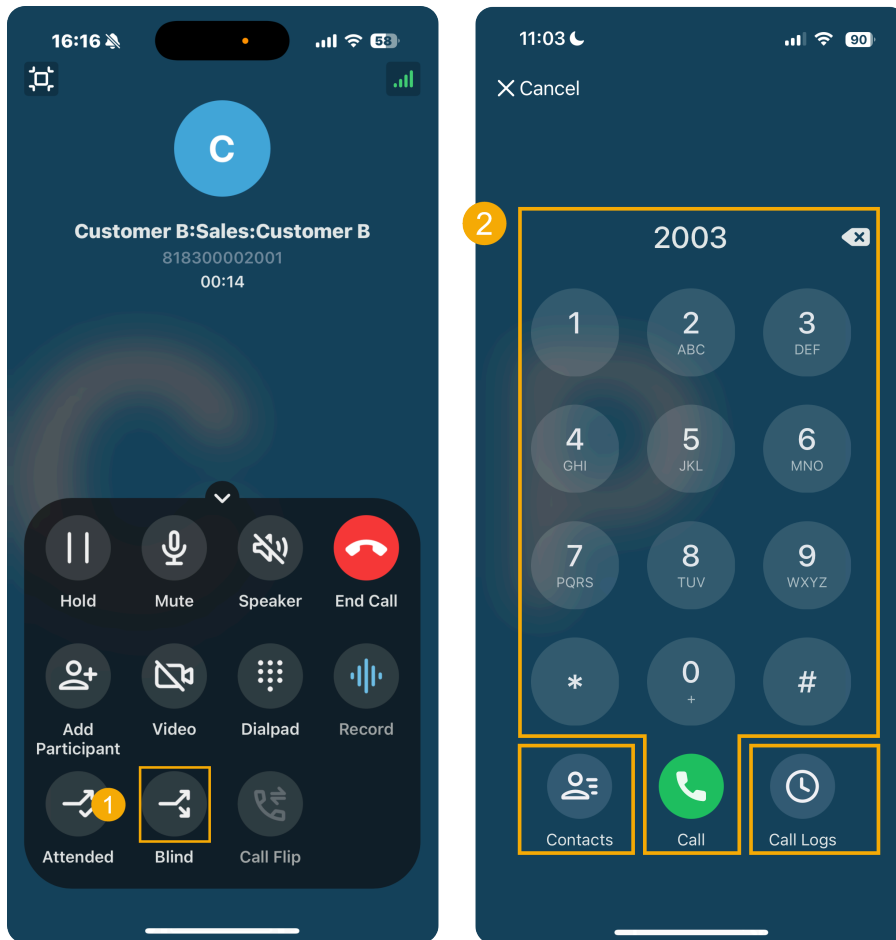
Transfer a call


You may need to transfer calls to other departments, or colleagues if you cannot handle the issue yourself.

There are two types of call transfer:

- **Blind Transfer:** Transfer an ongoing call to a third party immediately without giving him or her prior notification.
- **Attended Transfer:** Put the ongoing call on hold and establish a second call with third party to pass on all relevant information and get his or her consent before transferring the call.


Perform a blind transfer



1. During an active call, tap  (**Blind**) on the call screen.

The call is put on hold.



2. Select the desired individuals in any of the following ways:

- **Contacts:** Select a contact from your Linkus directory.
- **Dialpad:** Enter the desired phone number on the dialpad, then tap .
- **Call Logs:** Select a contact from call logs.

The current call is disconnected; The specified contact will receive the call. When the call is answered, the other two parties are connected.

Perform an attended transfer

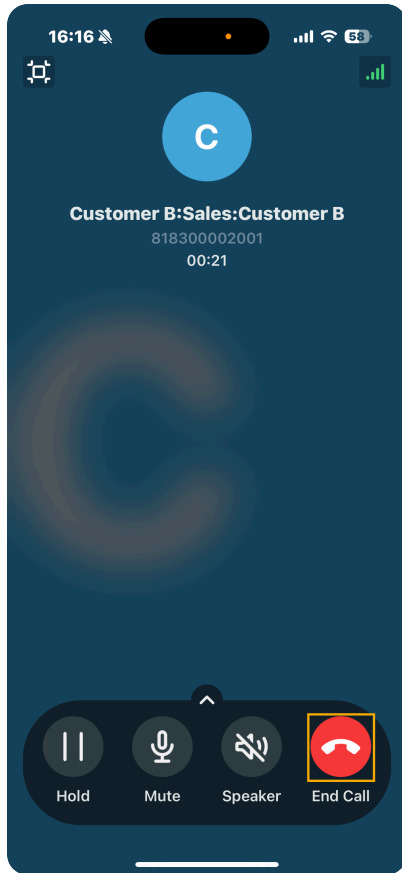


1. During an active call, tap  (**Attended**) on the call screen.
The call is put on hold.
2. Select the desired individual using either of the following methods.
 - **Contacts:** Select a contact from your Linkus directory.
 - **Dialpad:** Enter the desired phone number on the dialpad, then tap .
 - **Call Logs:** Select a contact from call logs.
 The specified extension user or contact will receive a call.
3. If the specified extension user or contact answers the call, you can talk to the contact to pass on all relevant information first, then tap **Attended**.
The current call is disconnected; The other two parties are connected.

Hang up a call

You can end the call once you have successfully address the caller's concerns or completed the necessary actions.

To hang up a call, tap  in the call screen.



Agent Status Management

Manage Your Status in Queues

As an agent of a queue or multiple queues, you can change your own status in a specific queue or in all queues on Linkus Mobile Client. This topic describes how to log in to and out of queues, pause and unpause queue calls.

Requirements

Make sure that the version of your Linkus Mobile Client meets the following requirements:

- **Linkus iOS Client:** Version 5.12.4 or later
- **Linkus Android Client:** Version 5.12.3 or later

Log in to queues



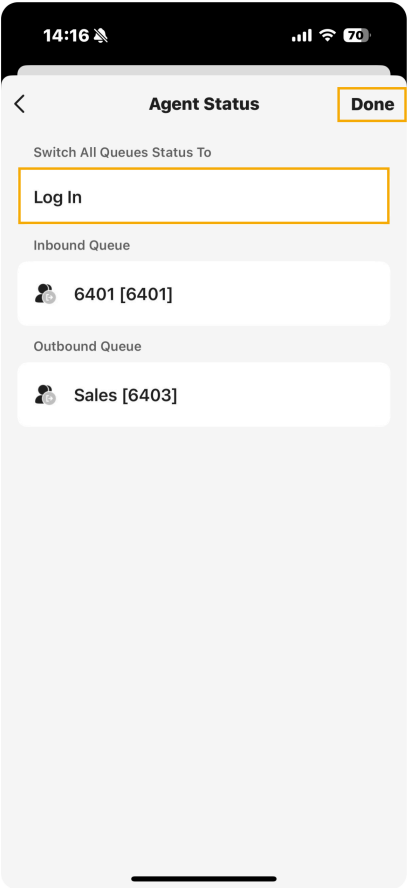
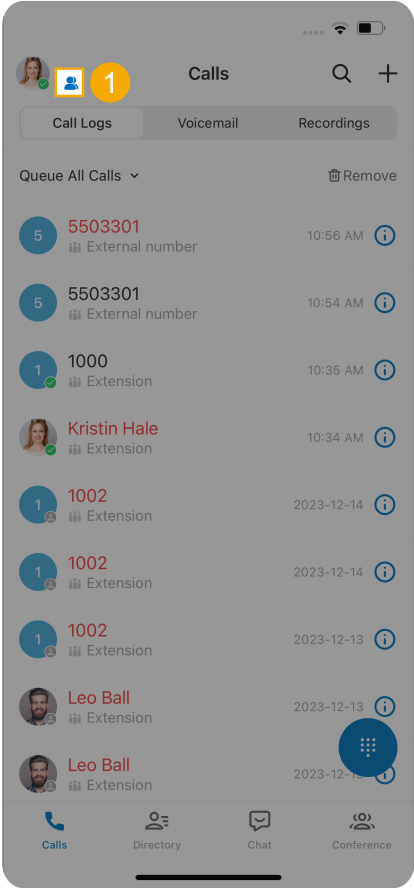

Note:



This operation is only available for dynamic agents.

Log in to all queues

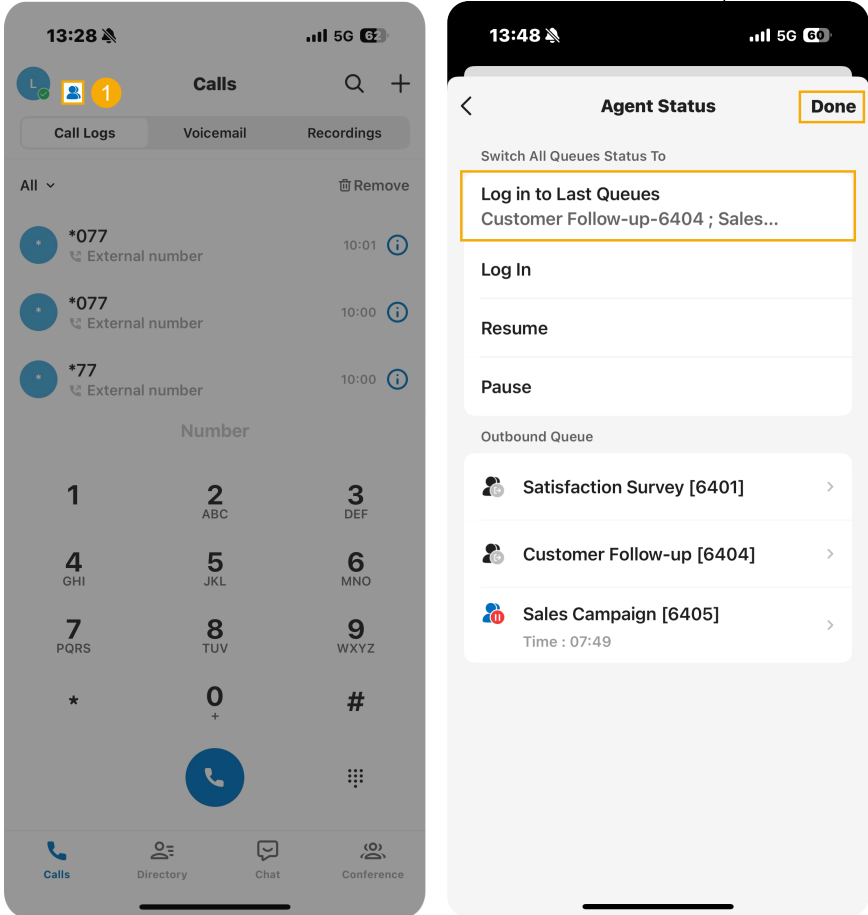

You can log in to all queues by either of the following methods:

Method	Instruction
Log in to all queues via the mobile interface	<div></div> <div><div>1. At the top-left corner of Linkus Mobile Client, tap  beside your account.</div><div>You are redirected to the Agent Status page.</div><div>2. In the Switch Status To section, tap Log In.</div><div>3. At the top-right corner, tap Done.</div></div>
Log in to all queues using feature code	<div><div>1. Obtain the Log In to All Queues feature code from the system administrator.</div><div>2. Dial the feature code.</div></div>

Method	Instruction
	For example, if the feature code is *77, simply dial *77 to log in to all queues you are assigned to.

Log in to all previously logged-in queues

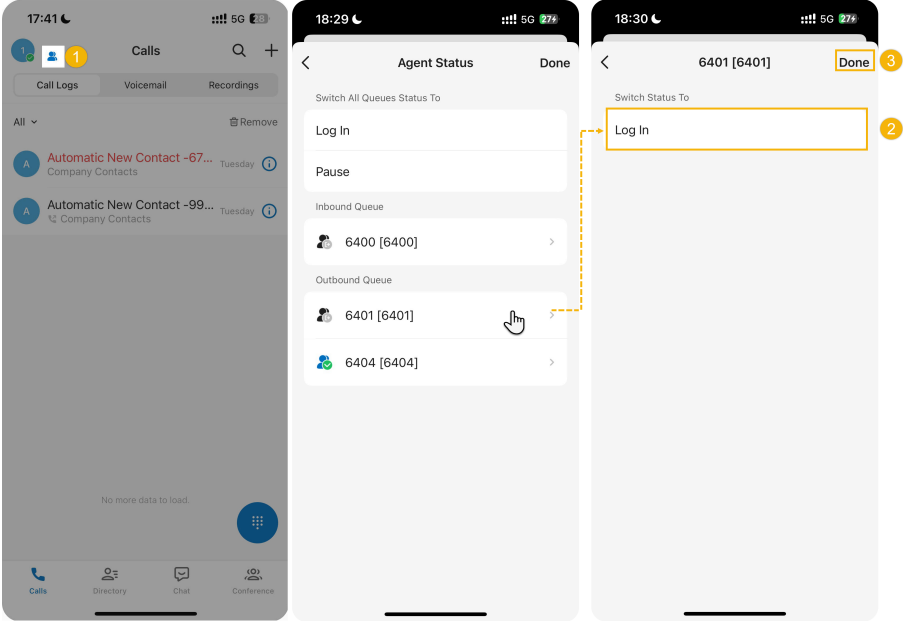

You can log in to all queues you were previously logged in to by either of the following methods, without needing to select each queue manually.

Method	Instruction
Log in to all previously logged-in queues via the mobile interface	 <ol style="list-style-type: none"> At the top-left corner of Linkus Mobile Client, tap  beside your account. You are redirected to the Agent Status page. In the Switch All Queue Status To section, tap Log in to Last Queues. At the top-right corner, tap Done.

Method	Instruction
Log in to last logged-in queues using feature code	<ol style="list-style-type: none"> 1. Obtain the Log in to Last Queues feature code from the system administrator. 2. Dial the feature code. <p>For example, if the feature code is *78, simply dial *78 to log in to all queues you previously logged in to.</p>

Log in to a specific queue

You can log in to a specific queue by any of the following methods:

Method	Instruction
Log in to a specific queue	 <ol style="list-style-type: none"> 1. At the top-left corner of Linkus Mobile Client, tap  beside your account. <p>You are redirected to the Agent Status page.</p> <ol style="list-style-type: none"> 2. Tap the desired queue, then tap Log In. 3. At the top-right corner, tap Done.
Log in to a specific queue using feature code	<ol style="list-style-type: none"> 1. Obtain the Log in/Log out feature code from the system administrator. 2. Dial the feature code. <p>For example, if the feature code is *7, to log in to queue 6400, simply dial *76400.</p>

Log out of queues

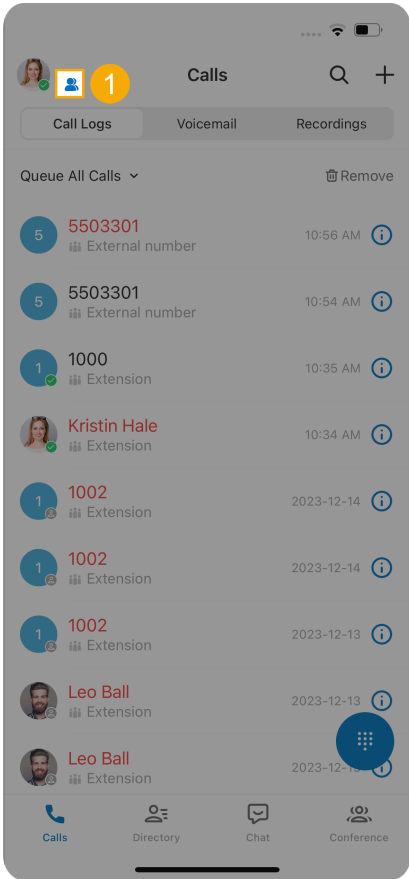
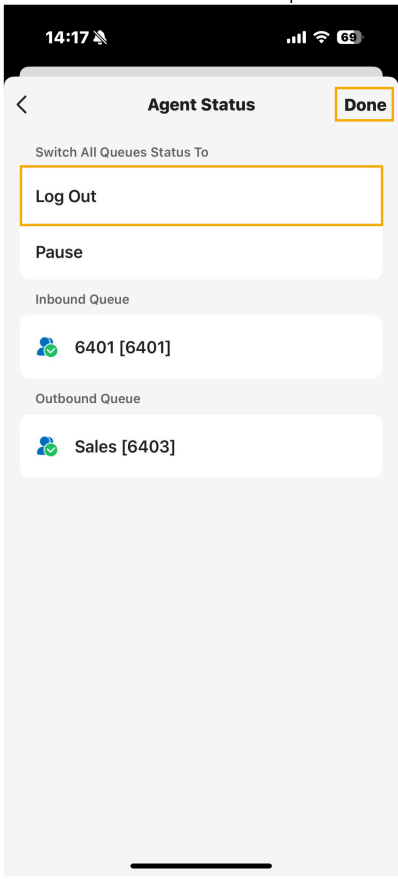



Note:

This operation is only available for dynamic agents.

Log out of all queues

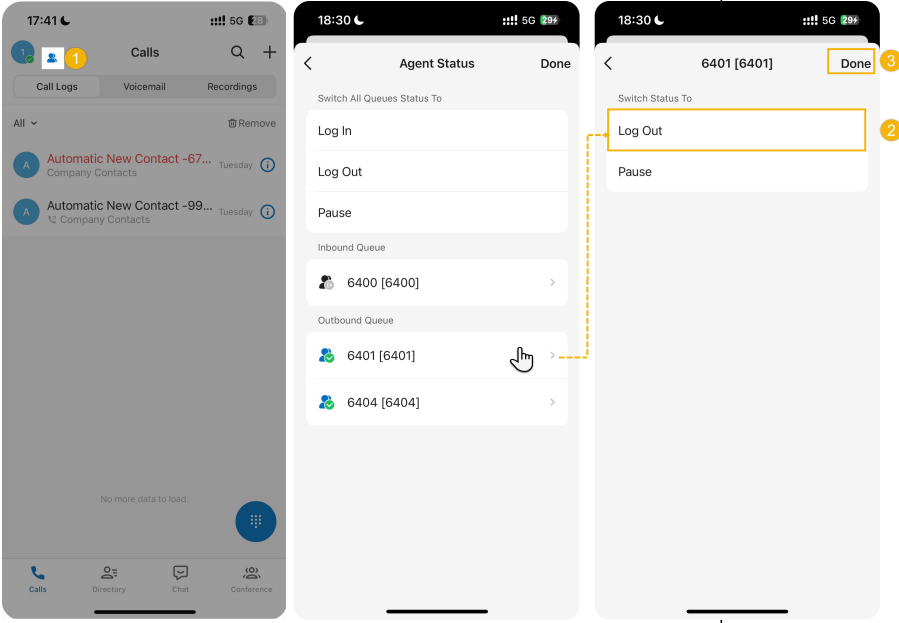

You can log out of all queues you are assigned by either of the following methods:

Method	Instruction
Log out of all queues via the mobile interface	  <ol style="list-style-type: none"> At the top-left corner of Linkus Mobile Client, tap  beside your account. You are redirected to the Agent Status page. In the Switch Status To section, tap Log Out. At the top-right corner, tap Done.

Method	Instruction
Log out of all queues using feature code	<ol style="list-style-type: none"> 1. Obtain the Log Out of All Queues feature code from the system administrator. 2. Dial the feature code. <p>For example, if the feature code is *077, simply dial *077 to log out of all queues you are assigned.</p>

Log out of a specific queue

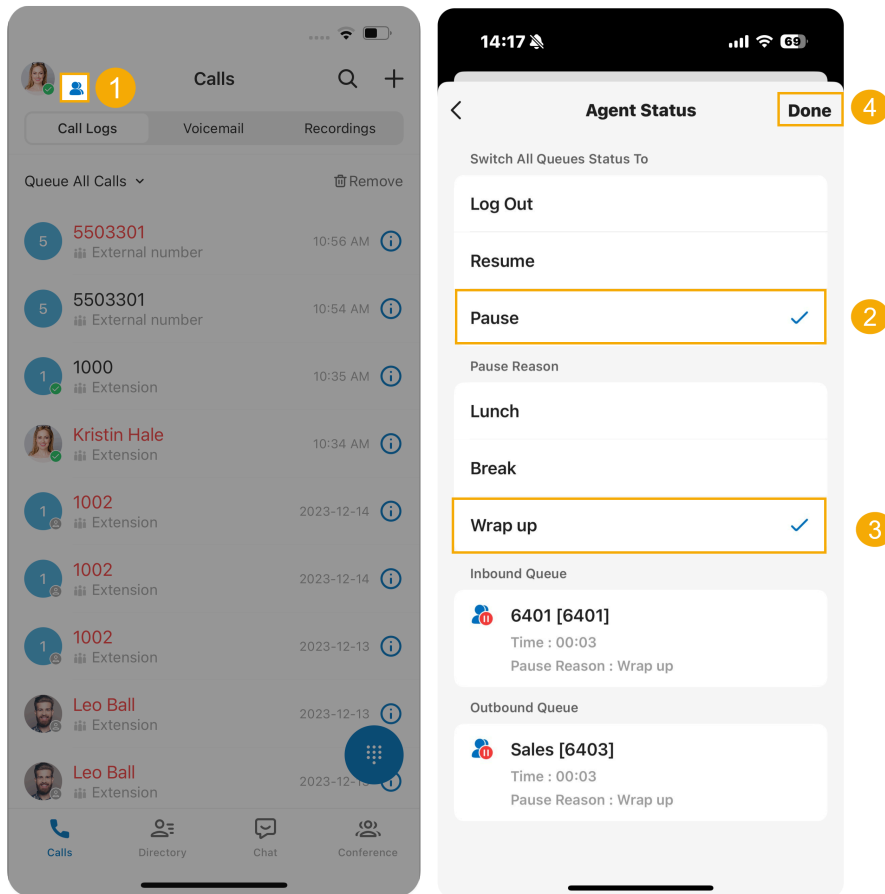
You can log out of a specific queue by any of the following methods:


Method	Instruction
Log out of a specific queue via the mobile interface	 <ol style="list-style-type: none"> 1. At the top-left corner of Linkus Mobile Client, tap  beside your account. <p>You are redirected to the Agent Status page.</p> <ol style="list-style-type: none"> 2. Tap the desired queue, then tap Log out. 3. At the top-right corner, tap Done.
Log out of a specific queue using feature code	<ol style="list-style-type: none"> 1. Obtain the Log in/Log out feature code from the system administrator. 2. Dial the feature code. <p>For example, if the feature code is *7, to log out of queue 6400, simply dial *76400.</p>

Pause queue calls

As a queue agent (be it static or dynamic), you can pause receiving queue calls when you are unavailable. The queue will not distribute calls to you after you pause queue calls.

Pause service in all queues



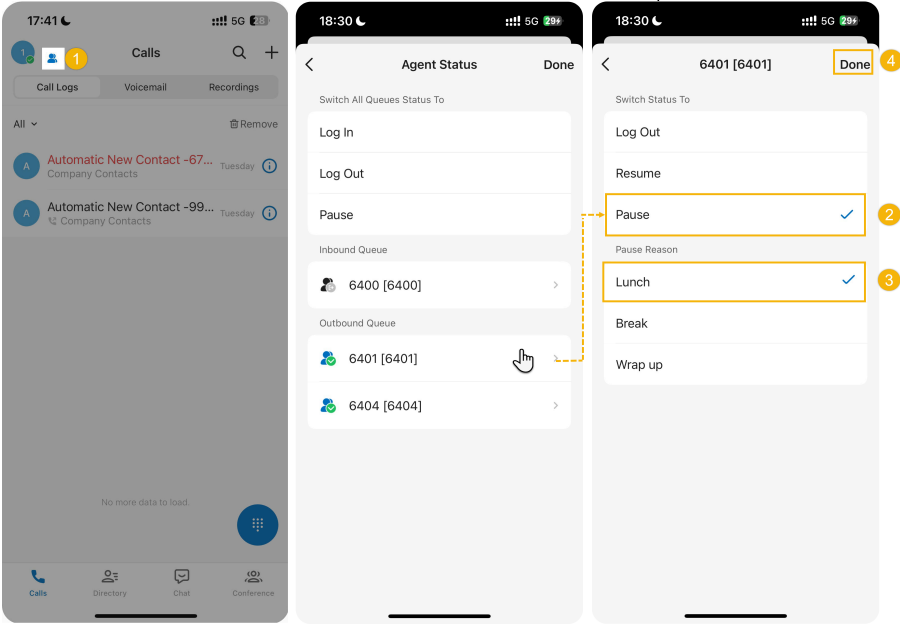

1. At the top-left corner of Linkus Mobile Client, tap  beside your account.

You are redirected to the **Agent Status** page.

2. In the **Switch Status To** section, tap **Pause**.
3. **Optional:** In the **Pause Reason** section, select a specific reason.
4. At the top-right corner, tap **Done**.

Pause service in a specific queue

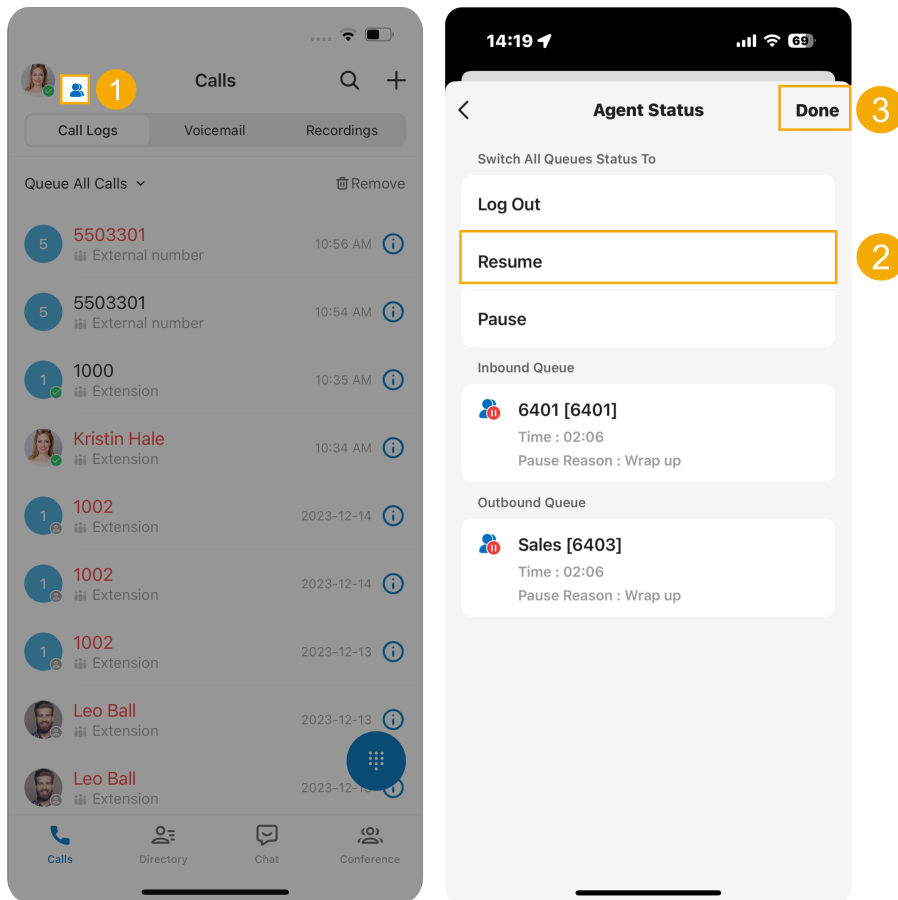
You can pause service in a specific queue by any of the following methods:


Method	Instruction
<p>Pause service in a specific queue via the mobile interface</p>	 <ol style="list-style-type: none"> At the top-left corner of Linkus Mobile Client, tap  beside your account. You are redirected to the Agent Status page. Tap the desired queue, then tap Pause. Optional: In the Pause Reason section, select a specific reason. At the top-right corner, tap Done.
<p>Pause service in a specific queue using feature code</p>	<ol style="list-style-type: none"> Obtain the Pause/Unpause feature code and the Pause Reason feature codes from the system administrator. Dial the feature code. <p>For example, if the Pause/Unpause feature code is *07, to pause service in queue 6400, do as follows:</p> <ul style="list-style-type: none"> To directly pause without reason, dial *076400. To pause with specific reason, dial *076400 plus the pause reason feature code, e.g. *076400*03.

Unpause queue calls

As a queue agent (be it static or dynamic), you can resume receiving queue calls when you are ready to take a call.

Unpause service in all queues



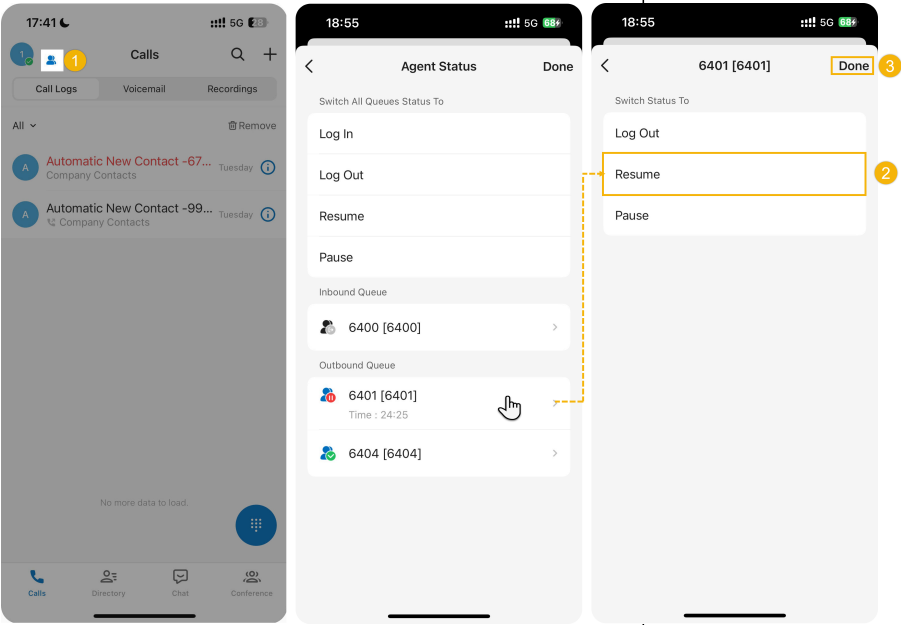

1. At the top-left corner of Linkus Mobile Client, tap  beside your account.

You are redirected to the **Agent Status** page.

2. In the **Switch Status To** section, tap **Resume**.
3. At the top-right corner, tap **Done**.

Unpause service in a specific queue

You can unpause service in a specific queue by any of the following methods:

Method	Instruction
Unpause service in a specific queue via the mobile interface	<div></div> <div><ol style="list-style-type: none">At the top-left corner of Linkus Mobile Client, tap  beside your account. You are redirected to the Agent Status page.Tap the desired queue, then tap Resume.At the top-right corner, tap Done.</div>
Unpause service in a specific queue using feature code	<div><ol style="list-style-type: none">Obtain the Pause/Unpause feature code from the system administrator.Dial the feature code. For example, if the feature code is *07, to unpause service in queue 6400, dial *076400.</div>

Related information
[Automatically Switch Agent Status Based on Extension Presence](#)


Automatically Switch Agent Status Based on Extension Presence

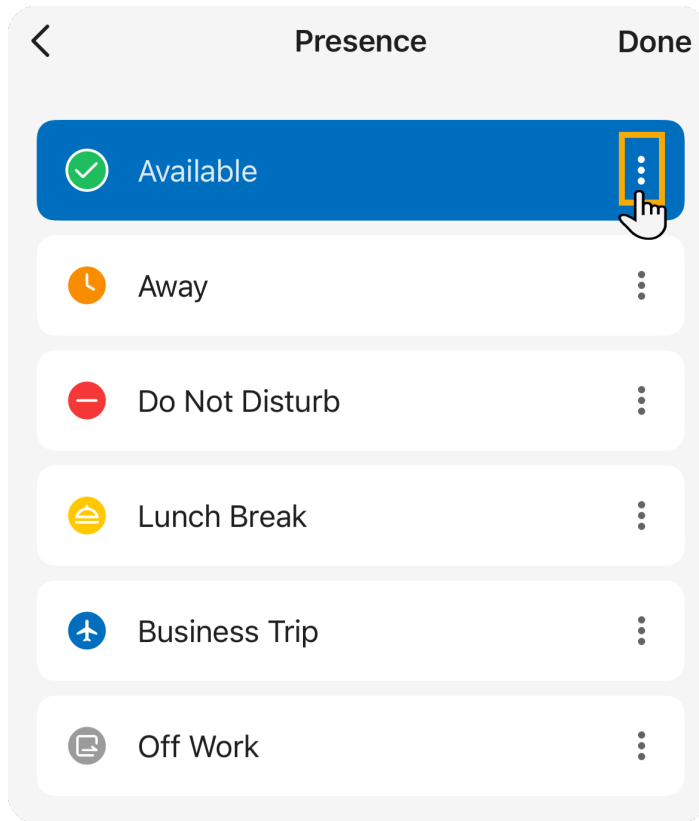
This topic describes how to set your agent status to automatically change along with your extension presence on Linkus Mobile Client.

Procedure

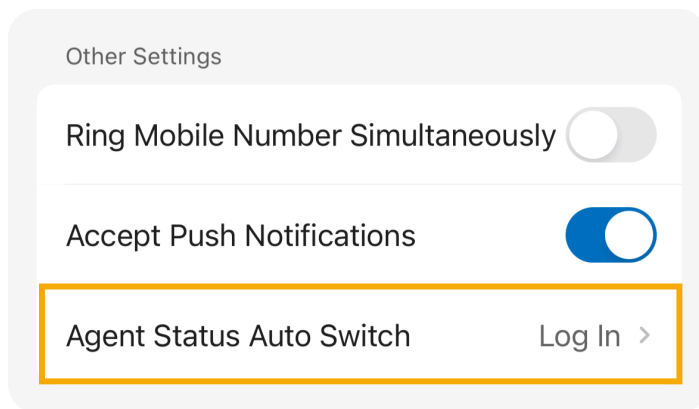
- At the top-left corner of Linkus Mobile Client, tap your account.

2. Go to **Current Presence**.

3. In the **Presence** list, click  beside the desired presence status.





4. Scroll down to the **Other Settings** section, then tap **Agent Status Auto Switch**.



5. Select an action according to your need.

Option	Description
Log In	When your extension changes to the presence status, you will automatically log in to all the queues to which you belong. <ul style="list-style-type: none"> • Dynamic agent: Log in to the queues.

Option	Description
	<ul style="list-style-type: none"> • Static agent: Resume receiving calls from the queues.
Log in to Last Queues	<p>When your extension changes to the presence status, you will automatically log in to all previously logged-in queues.</p> <ul style="list-style-type: none"> • Dynamic agent: Log in to the queues. • Static agent: Resume receiving calls from the queues.
Log Out	<p>When your extension changes to the presence status, you will automatically log out from all the queues to which you belong.</p> <div>  Note: The logout operation is only available for dynamic agent. </div>
Pause	<p>When your extension changes to the presence status, you will automatically pause receiving queue calls.</p> <div>  Note: You can select a specific pause reason in the Pause Reason drop-down list. </div>
Do Nothing	<p>When your extension changes to the presence status, your agent status in the queues remains unaffected.</p>

6. To configure the agent status auto-switch for more presence status, repeat Step 3 - 5.

Manage Outbound Queue Call Logs

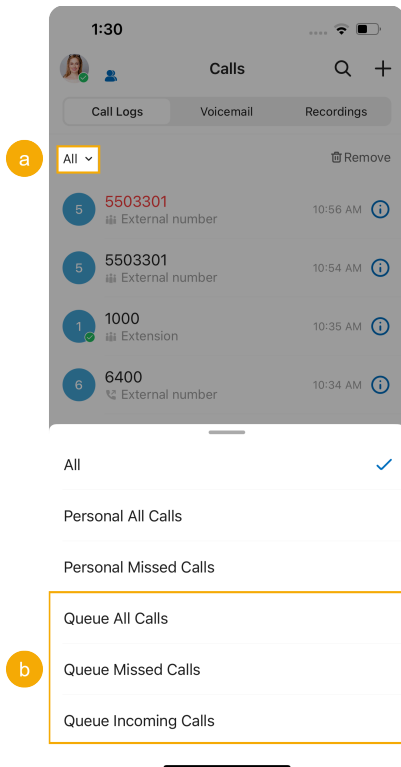
This topic describes how to check and manage the outbound queue call logs on Linkus Mobile Client.

Requirements


- System administrator has granted you the viewing permission of queue call logs.
- Make sure that the version of your Linkus Mobile Client meets the following requirements:
 - **Linkus iOS Client:** Version 5.12.4 or later
 - **Linkus Android Client:** Version 5.12.3 or later

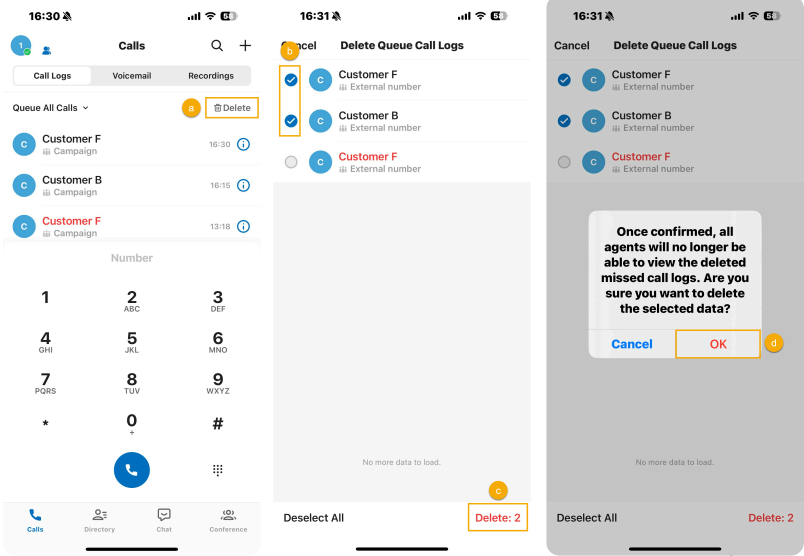
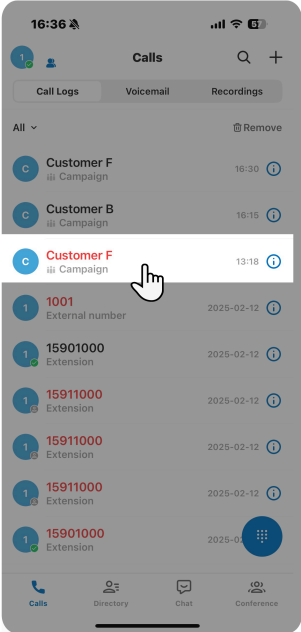
Procedure

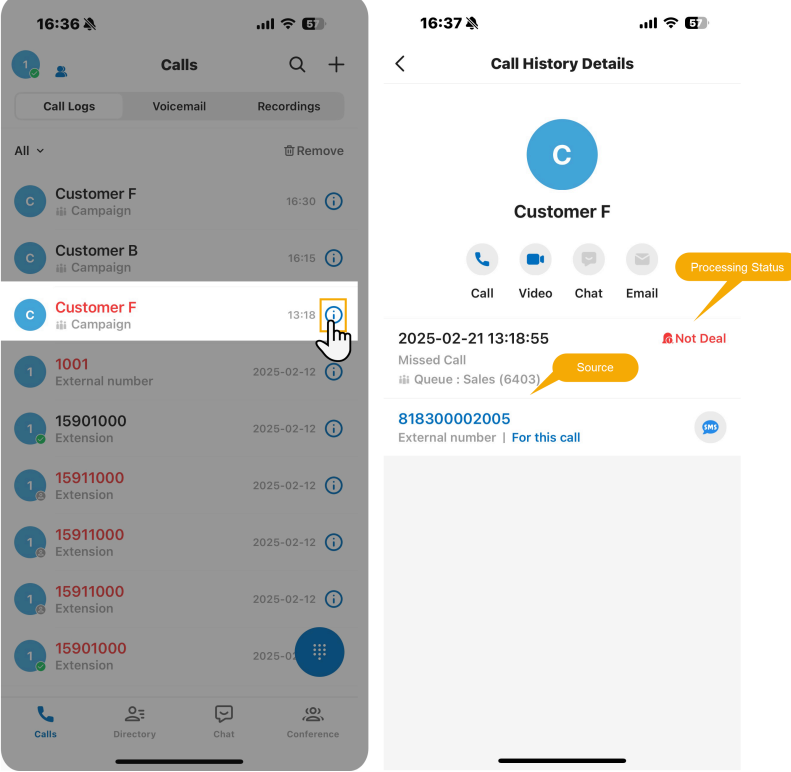
1. Log in to Linkus Mobile Client, go to **Calls > Call Logs**.
2. At the top-left corner, filter the desired queue call logs.




- **Queue All Calls:** Logs of the queue calls that you have answered and the queue has missed.
 - **Queue Missed Calls:** Logs of the queue calls that the queue has missed.
 - **Queue Incoming Calls:** Logs of the queue calls that you have answered.
3. Manage the call logs according to your needs.

Operation	Instruction
Delete incoming queue call logs	<p> Note: Only supports to delete the call logs of queue calls that you have answered.</p> <p>You can delete incoming queue call logs via the following methods:</p> <ul style="list-style-type: none"> • To delete a single call log, swipe left on the desired call log, then tap Delete. • To bulk delete call logs, do as follows:

Operation	Instruction
	<div></div> <div><div>a. At the top-right corner, tap Delete.</div><div>b. Select the checkboxes of the desired incoming queue call logs.</div><div>c. Tap Delete.</div><div>d. In the pop-up window, tap OK to confirm your operation.</div></div>
Place a call to the caller	<div><p>You can directly place a call from a call log by tapping the call log.</p></div>
Check the details of queue call logs	<div><p>You can conveniently check the source of the queue call logs, as well as the processing status of missed queue calls.</p></div>

Operation	Instruction
	 <p>a. Tap ⓘ beside the desired queue call log.</p> <p>b. Check the details of the call log.</p> <ul style="list-style-type: none"> • Source: The queue the call came from. • Processing Status: The processing status of a missed queue call.
Change the processing status of a missed queue call	If you decide to handle a missed queue call, or you have handled it, you can change the processing status of the missed queue call.

Operation	Instruction
	<div><div><div><div><div><div>16:36</div><div>Calls</div><div>Call LogsVoicemailRecordings</div><div>All</div><div><div>Customer F</div><div>16:30</div></div><div><div>Customer B</div><div>16:15</div></div><div><div>Customer F</div><div>16:15</div></div><div><div>1001</div><div>External number</div><div>2025-02-12</div></div><div><div>15901000</div><div>Extension</div><div>2025-02-12</div></div><div><div>15911000</div><div>Extension</div><div>2025-02-12</div></div><div><div>15911000</div><div>Extension</div><div>2025-02-12</div></div><div><div>15911000</div><div>Extension</div><div>2025-02-12</div></div><div><div>15901000</div><div>Extension</div><div>2025-02-12</div></div></div></div><div><div>16:37</div><div>Call History Details</div><div><div>Customer F</div><div>2025-02-21 13:18:55</div><div>Missed Call</div><div>Queue : Sales (6403)</div><div>818300002005</div><div>External number For this call</div></div><div><div>Processing Result</div><div><div>Not Deal</div><div>Dealing</div><div>Dealt</div></div></div></div></div><div><div>a</div><div>b</div><div>c</div></div><div><div>a. Tap  beside the desired queue call log.</div><div>b. Tap the processing status beside the call log details.</div><div>c. Select the desired processing status.</div></div><div><p>The processing status is changed; All the authorized agents can see the change and check the operation record.</p></div></div></div>

Operation	Instruction
	<div><div>16:37</div><div>Call History Details</div><div><div>C</div><div>Customer F</div><div><div>Call</div><div>Video</div><div>Chat</div><div>Email</div></div><div><div>2025-02-21 13:18:55</div><div>Missed Call</div><div>Queue : Sales (6403)</div><div>818300002005</div><div>External number For this call</div></div><div>Not Deal</div><div>Processing Result</div><div>Operator: 15921000(15921000)</div><div>Operation Time: 2025/02/21 16:37:03</div><div><div>Not Deal</div><div>Dealing</div><div>Dealt</div></div></div></div>