

一、新建任务

AI 外呼--任务管理--新建任务--导入号码--开始任务

①新建任务



- (1) 任务名称：任意命名即可。
- (2) 选择话术：选择制作好的业务话术
- (3) 定时启动：可以设置日期及时间点，用于每日定时定点外呼。一般建议设置 9:00-12:00, 14:00-19:00，可在这个时间段内调整。
- (4) 机器人数量：选择本次任务要用的机器人并发数量
- (5) 线路及 ASR：可根据不同线路的资费和接通情况，进行选择，在任务进行过程中，也可以随时更换。
- (6) 是否重新呼叫：重新呼叫，只针对未接通的号码，最多可重呼 4 次。已接通号码同一个任务不会呼叫第二遍。

重呼为顺序呼叫，即按照号码导入顺序，从上至下依次呼叫未接通号码，不是 1 个号码连续呼叫 n 遍。

！！注：机器人任务默认保存 30 天，超期将自动删除，任务删除后无法在【任务管理】列表中查看任务情况，通话记录仍可在【历史通话】中查看。

②导入号码：点击需要导入号码的任务--导入号码



导入号码时需要先下载 excel 模板



excel 模板第一行标题行不能更改，把手机号粘贴到【号码】一列，机器人会按照【号码】列的号码一次拨打。

A	B	C	D	E	F
公司名称	号码	分组 (可为空)	联系人 (可为空)		
张三1	13600001111	测试	李		
李四1	13600002222		张		
4					
5					
6					

二、通话查询

可在【当天通话】、【历史通话】查询AI呼叫记录。

【当天通话】查询今日通话记录。

【历史通话】查询昨日及之前通话记录。

The screenshot shows the SalesPro CRM software interface. The top navigation bar includes links for CRM, Find Company, AI External Call, Work Order Approval, Reports, AI Marketing, Business Academy, and Assistant. On the right, there are links for APP Download, Settings, and User Profile. The left sidebar has sections for Data Summary, Strategy Configuration, Task Management, Task Statistics, and a highlighted 'Recent Calls' section. The main content area displays a 'Recent Calls' list with columns for序号 (ID), 公司名称 (Company Name), 联系人 (Contact Person), 手机号码 (Mobile Number), 通话时长 (S) (Call Duration (S)), 状态 (Status), 声向等级 (Call Type Level), 任务名称 (Task Name), 话术名称 (Script Name), 拨打时间 (Call Time), and 操作 (Operations). A search bar at the top right allows for phone number queries.

除页面默认展示的筛选条件外，用户也可以点击右侧【更多条件】，增加其他筛选条件。

The screenshot shows the 'Current Call Record' section of a CRM application. A modal window titled 'Add Configuration' is open, displaying various filtering options. On the right side of the modal, there is a button labeled 'More Conditions' which is highlighted with a red box and an arrow pointing to it.

三、意向客户查看

(1) AI 打出的意向客户，可在 CRM--待办事项--AI 外呼推送客户中查看并处理。同时也可以在【客户】中进行更精细化管理，CRM 客户管理流程见【二、CRM（客户管理）】

The screenshot shows the 'CRM Pending Tasks' section. On the left, there is a sidebar with various categories like '首页', '线索', '客户', etc. Under '待办事项', there is a list of tasks. One specific task, 'AI外呼推送客户', is highlighted with a red box and an arrow pointing to it. To the right, there is a search and filter panel for '今日需联系客户'.

(2) 如未开通【CRM】板块，AI 外呼模块自带简易客户管理，可以在这里筛选并查看客户。

The screenshot shows the 创销宝 CRM software interface. At the top, there are several navigation tabs: CRM, 找企业, AI外呼, 工单审批, 报表, AI营销, 商学院, and 企微助手. On the right side, there are links for APP下载 and 设置, along with a user profile icon. The main area is titled '客户管理' (Customer Management). It includes search filters for '客户姓名' (Customer Name), '所属任务' (Task Category), '创建时间' (Creation Time), and '意向等级' (Intention Level) with options for 全部 (All), A级意向 (A-level Intention), B级意向 (B-level Intention), and C级意向 (C-level Intention). Below these are filters for '通话状态' (Call Status), '是否回访' (Whether Follow-up), and '客户意愿' (Customer Willingness). A red arrow points to the '客户管理' button in the sidebar.

四、话术设计

新建话术，可以选择大模型、发音人。

The screenshot shows the AI script configuration interface. At the top, there is a blue button labeled '+ 创建' (Create New). Below it, the '智能体名称' (Agent Name) is set to '电话测试' (Phone Test) and '文本测试' (Text Test). To the right, it shows '大模型:豆包lit 4K' (Large Model: Doubaolit 4K) and '发音人: 邻家女孩' (Speaker: Neijia Girl). There are tabs for '内容配置' (Content Configuration), '自定义回复' (Custom Response), '语义' (Semantics), '录音' (Recording), '意向标签' (Intention Tag), and '缓存记忆' (Cache Memory). The '人设与回复逻辑' (Personality and Response Logic) section has a '合成音频' (Synthetic Audio) button with a '发布' (Release) button. A note says '② 配置完成后, 点击发布按钮保存' (After configuration is completed, click the publish button to save). The '开场白文案' (Opening White Paper) section has a text input field with placeholder '请输入文字' (Please enter text). The '开场白音频' (Opening White Paper Audio) section shows a waveform with '0:00 / 0:00'. The '结束语文案' (Ending Word Text) section has a text input field with placeholder '请输入文字'.

机器人由一对一售后群对接服务。