I-Tel Dialer Handbook

Version 10.5.298 – Revised 10/16/2012

The purpose of this handbook is to act as a guide or reference to quickly review or re-visit specific areas of the I-Tel dialer. The handbook will cover key elements of the dialer, so it will be good preparation material for new dialer clients as well as a refresher for current I-Tel dialer users. This handbook contain information regard features supported in version 10.5.298. For information regarding pass versions release please refer to the handbook for that release.

This document will cover Creating Campaigns in I-Tel and in the Campaign manager; handling specific management options like creating Hunt Groups and adding members to those hunt groups, maintaining a Do Not Call list and building dialer campaigns using Queue consolidations and Contact series options.

 Additionally, some of the system control options have been addressed to help with the initial set-up. Follow the sections below to set up and maintain the I-Tel dialer.

1. Initial set-up
    a. System controls
    b. Creating campaigns
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    d. Queue consolidations
2. Advanced options
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5. I-Tel dialer/Softdial control center
6. Conclusion

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SYSTEM SECURITY

SETTING UP USERS IN RMEX FOR I-TEL

There is some set up required at the UserId level in System Security to allow a user access/no access to the dialer.

- **Preview – Power - Progressive - Predictive dialing:** By default the agents are allowed to perform these functions. If you need to stop an agent from accessing any of these areas, place an 'N' in the field. An 'I' is needed if you would like the agent to do outbound dialing only (inbound will not be available) or leave the fields 'blank' (default), which gives the agent access.
- **Inbound and ACD for I-Tel:**
- **I-Tel Dialer Code:** Before a collector can use the Dialer, their UserId must be mapped to the Dialer code. The default is "A" unless you have multiple dialers.
- **Call Recording:** You can control call recording at the UserId level. If you have the recording flag set globally for call recording, you can still restrict call recording for a user, by entering an 'N' in this field.
- **Dialer Group Code:** You can group collectors based on a similar group code. Then you can do things like consolidations based on a Dialer Group Code instead of running multiple consolidations to accomplish the same task. You can also create campaigns based on Dialer Group Codes.
- **I-Tel extension at sign-on:** This field is no longer in use.

SYSTEM CONTROLS

VALID EXTENSIONS

At minimum, an extension needs set up for each agent that would be logging in to the dialer. The base extension is typically called the outbound extension and needs to be entered in to this area. The next extension could be classified as the inbound extension and would also be entered. If a valid extension is entered it cannot also be entered as a NNE.
This screen is available from the I-Tel menu in System controls.

Important – a valid extension cannot be the same as a DNIS

```
                         Valid Extensions                    9/26/2012 13:36:12
                                                             System:    S10E9B6C

     Position to  . . . . .           [      ]    Starting value


     Type options, press Enter.
        2=Change   3=Copy   4=Delete   5=Display   6=Print


            Outbound         Remote    Inbound  Voicemail  Primary   Dialer
     Opt Extension         Extension  Extension Extension  User      Code
      [ ]       101                              301                  A
      [ ]       102                              302                  A
      [ ]       103                                                   A
      [ ]       105                              305                  A
      [ ]       106                              306                  A
      [ ]       107                              307                  A
      [ ]       111                              113                  A
      [ ]       112                              112                  A
      [ ]       131                              431                  A
      [ ]       132                              332                  A
      [ ]       133                                                   A
                                                                       More...
     F3=Exit        F5=Refresh      F6=Create      F12=Cancel
       F14=Previous view      F15=Next view    F17=Top     F18=Bottom      F21=Print list
     Copyright (c) 2005 by Quantrax Corporation.
```

F6 to create an entry

```
                        Change Valid Extensions              9/26/2012 13:37:07
                                                             System:    S10E9B6C

    Type choices, press Enter.


       Outbound extension  . . . . . . . . . . . . :        101


       Turn on call recording? (Y,N, or " ")   . .        [   ]
       Remote extension  . . . . . . . . . . . .          [         ]
       Inbound extension   . . . . . . . . . . .            [  301  ]
       Logon control . . . . . . . . . . . . . .          [   ]
       Voicemail extension   . . . . . . . . . .          [        ]
       Primary user  . . . . . . . . . . . . . .          [        ]
       Dialer code   . . . . . . . . . . . . . .          [A]




       F3=Exit       F5=Refresh        F12=Cancel
```

- Enter the valid outbound extension
- Turn on call recording for this extension, if needed
- If the agent is working remotely, enter their number here – enter 11 in front long distance number or 00 in front for local numbers (follow the STG configuration details)
- Regarding the inbound extension - Enter second extension, if there isn't a second ext a non-valid extension can also be used to enable blending.
- Login control is not currently used
- Can use voicemail extension if it has its own DNIS. Must have a valid OB and IB value. And, a valid UserID must be associated with the voicemail extension
- When UserID and voicemail extension are used, the voicemail extension is automatically logged in when the mini-server is started
- Dialer code is "A" (unless you have multiple dialers)

NOTE –
An outbound extension and the dialer code are all that is mandatory to enter a valid extension.

NON-RMEX USERS (NNE'S - NON-NAILED-UP EXTENSIONS)

This option is used for setting up extensions for Voice Mails and extension or users that are *never* logged into the dialer. (E.g. Clerical – Receptionist – a manager – or operator)
NNE's allow us to automatically log those extensions into I-Tel and the dialer. Now, a call through the dialer can be routed not only to an agent but to that NNE (non-agent user).

First create the NNE in I-Tel by going to the I-Tel menu and selecting Non-RMEx users. Press F6 to create a NNE.

```
                        Change Non-Intelec Users                 9/26/2012 13:37:49
                                                                 System:   S10E9B6C

    Type choices, press Enter.


        Dialer code   . . . . . . . . . . . . . :      A
        User  . . . . . . . . . . . . . . . . . :      TEST

        Extension   . . . . . . . . . . . . . .        [   314 ]

        Is This a IVR Agent (Y/N)?. . . . . . . .       [   ]









    F3=Exit       F5=Refresh       F12=Cancel
```

Dialer Code: Dialer code is "A" (unless you have multiple dialers).
User: Need to enter a code that is not an Intelec user ID. This user ID will not be used to log into the iSeries.
Extension: The extension of the user who will be receiving the call.
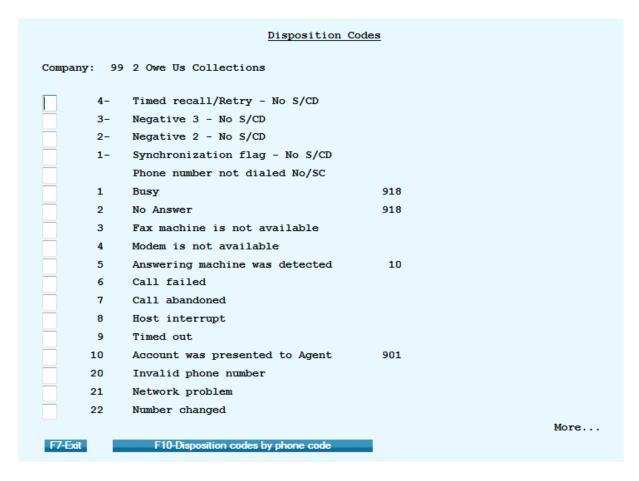**Is this an IVR Agent (Y/N)?**: Enter "N" or leave blank.

NOTE:
o   If a NNE is a live agent, you MUST use a valid PBX extension AND they must **not** be set up in valid extensions.

DISPOSITION CODES

Note: If this is the first time you are setting up the Disposition Codes, this menu may be blank. Take option 23 "Support Option" then, Option 4. "Copy Disposition Codes by Company" and copy the table from company 99 to the current company you are setting up. In addition, there is field text for the items listed. Just place your cursor in front of one of the disposition codes and hit help.

This option will allow you to specify Smart Codes to be applied based on Disposition Codes – which are the codes applied based on the call outcome. Place any character in front of the description to update the disposition codes and you will be presented with the following screen:

```
                          Disposition Codes


Company:   99 2 Owe Us Collections


  [ ]       4-    Timed recall/Retry - No S/CD
  [ ]       3-    Negative 3 - No S/CD
  [ ]       2-    Negative 2 - No S/CD
  [ ]       1-    Synchronization flag - No S/CD
  [ ]             Phone number not dialed No/SC
  [ ]       1     Busy                           918
  [ ]       2     No Answer                       918
  [ ]       3     Fax machine is not available
  [ ]       4     Modem is not available
  [ ]       5     Answering machine was detected    10
  [ ]       6     Call failed
  [ ]       7     Call abandoned
  [ ]       8     Host interrupt
  [ ]       9     Timed out
  [ ]      10     Account was presented to Agent    901
  [ ]      20     Invalid phone number
  [ ]      21     Network problem
  [ ]      22     Number changed
                                                    More...

  F7-Exit          F10-Disposition codes by phone code
```

FYI - the Smart Codes for the Disposition codes are applied when the disposition occurs not during the nightly. So, reports can be run immediately and smart codes will be updated on the accounts immediately. In addition, remember you can take the option to have the smart code applied each and every time the disposition code is met.

Disposition Code: Is informational only.

Is this a "non-connect" Disposition Code (Y): By placing a "Y" here, if an account is called during a campaign and was not contacted (no answer), the "Y" will treat this account as **not** having been worked and will allow it to be eligible for re-calling or re-selected in a different campaign.

Smart Code to apply when this switch disposition code is detected on a call result: Enter the Smart code to be applied when the disposition code is returned.

Note: Each column represents the type of number called. Ex. Home Phone, Work Phone and additional numbers. Thus you can apply different Smart Codes based on the number dialed.

Apply a Smart Code if this switch disposition code is repeated on successive call results? (Y, b): This field is optional but will allow you to apply the same or a different Smart Code on the second call, and each consecutive call thereafter.

Smart Code to apply when switch disposition is repeated: This field is optional - enter the Smart code to be applied when the second, third calls are made.

NOTE: You will want to make this Smart Code "Type" an "O" (Other). An example why you would want to use this is if you had 3 no answers *in one day* and did not want to increase the number of "Attempts" by 3 on the "Account Detail" screen.

Please Remember: <u>The negative Disposition Codes are for internal use only and NO Smart Codes should be applied.</u>"

DISPOSITION CODES BY PHONE CODE

Disposition code by phone code allows you to enter map disposition codes to different smart codes based on the phone code dialled regardless of which phone number field was dialled. This is the new method of disposition code management and is the recommended method.

Disposition code by phone code **must** be set up in order to use Calling Multiple Numbers by Campaign feature.

For detailed instructions on how to set up disposition codes by phone codes, please review the article RMEx2.2 Disposition by phone type.

PHONE NUMBER MAINTENANCE

Area codes and exchanges need to be kept up to date. To help facilitate this process menu designed to assist in phone number maintenance.
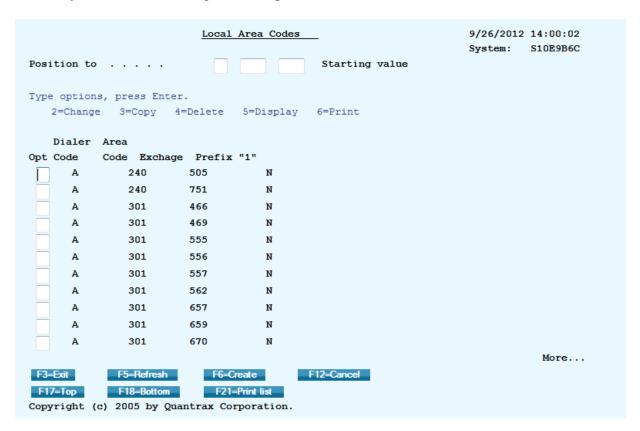
For detailed instructions on this menu, please review the following document titled: Phone Number Maintenance Option.

In order to stay compliant with time zone data, you must ensure that you have the latest information from MelissaData. MelissaData provides detailed time zone information based on phone number and exchange.

For detailed instructions on how to load this data, please review the following document titled: Updating the Melissadata time zone FONEDATA files.

LOCAL AREA CODES

This feature is used IF you have to differentiate between local and long distance calls to your provider. This is accomplished by just entering the local area codes into the table. We can then adjust the format of how we send the phone number to your telephony provider in the STG setup. We can also setup specific PSTNs to use for local or long distance (normally done for cost saving based on provider).

```
                        Local Area Codes                      9/26/2012 14:00:02
                                                              System:    S10E9B6C

    Position to  . . . . .        [  ] [   ] [    ]    Starting value


    Type options, press Enter.
        2=Change   3=Copy   4=Delete   5=Display   6=Print


        Dialer  Area
    Opt Code    Code  Exchage  Prefix "1"
    [ ]    A         240     505        N
    [ ]    A         240     751        N
    [ ]    A         301     466        N
    [ ]    A         301     469        N
    [ ]    A         301     555        N
    [ ]    A         301     556        N
    [ ]    A         301     557        N
    [ ]    A         301     562        N
    [ ]    A         301     657        N
    [ ]    A         301     659        N
    [ ]    A         301     670        N
                                                                      More...

    F3=Exit      F5=Refresh     F6=Create      F12=Cancel
    F17=Top      F18=Bottom     F21=Print list
    Copyright (c) 2005 by Quantrax Corporation.
```

Dialer code: Dialer code is "A" (unless you have multiple dialers).

Area code: If an entire Area Code is to be dialed out as a local call, you need to enter the Area Code here.

Exchange: Enter specific exchanges within that Area Code to be considered   local.

Prefix: Enter "N" to indicate the number should be treated as local.

If you enter an area code without entering an exchange, all exchanges in that area code will follow the same rules.

Note: - **If the local number is dialed differently than the long distance number, you will need to use this option.**

DNIS TEXT

The text entered here will be displayed to the agent when an Inbound call comes in thru that DNIS. (Note: You will have to put a "Y" in the dialer control file (in I-Tel) in the field "Show Inbound Messages")

```
                        DNIS Text                          9/26/2012 14:09:05
                                                           System:   S10E9B6C

  Position to  . . . . .        [  ] [        ]     Starting value


  Type options, press Enter.
     2=Change   3=Copy   4=Delete   5=Display   6=Print


        Dialer
  Opt Code          DNIS  Text
     [  ]   A          2610    General Hospital
     [  ]   A          2651    General Hospital




                                                                     Bottom
    F3=Exit       F5=Refresh       F6=Create       F12=Cancel
      F14=Previous view       F15=Next view       F17=Top     F18=Bottom     F21=Print list
  Copyright (c) 2005 by Quantrax Corporation.
```

Dialer code: Dialer code is "A" (unless you have multiple dialers).
DNIS: The Dialed Number Identification Service (DNIS) associated with the inbound line. This information is normally available from your telephony provider.
Text: The text that should appear at the bottom of the screen on the agent's RMEX session when an inbound with this DNIS is being offered.

SYSTEM CONTROLS

Important NOTE – In 'System controls/Dialer control file', the Code in the top left hand corner MUST be an "I". If you have anything else in this field, please CALL Quantrax immediately.

Digits in extension: Number of digits the PBX expects from the dialer.

Call Recording for all Companies: "Y" if call recording should be turned on globally for ALL companies. "N" if call recording should not be turned on globally for all companies. "blank" will allow call recording to be turned on, either at the campaign level or extension level.

Code to add to non-local#: Leave blank

Dialer Time zone (system time): Enter the difference from where the iSeries is located in relation to the GMT. (Ex: EST=5)

Hours behind GMT: This value should be the same as "Dialer Time Zone – System Time)

Hours ahead of GMT: Leave blank

Is DST on? : If Daylight Savings Time is in effect, enter a "Y". In the spring you will enter a "Y" and in the fall the Y needs to be removed. (If this is not set correctly you will have time zone issue.)

Override dialer Message Queue: The default is that campaign messages will be sent to ITELMSGQ. This option will allow you to re-route those messages. (Ex: could be sent to dialer manager)

Override Message queue library: The default should be SCLIB.

Show inbound messages (Y, N): Enter "Y" if you want a message displayed when an IB call comes in or "N" to not display a message.

Include balance in message: If you are displaying a message on an IB call, do you want to also display the balance? "Y" for yes, "N" for no.

Show Balance if over: If you are displaying IB messages and showing balance but only want the balance shown if it is greater than or equal to the amount entered in this field.

Days to keep call state records: This is a detailed log of each and every call made thru the dialer for reporting purposes. We suggest NOT storing records for more than 30 days.

Omit 800#'s in time zone calculations: 800#'s can be excluded from time zone calculations by entering an 'N' to omit when there are other numbers on the main detail screen or an 'A' to ALWAYS omit regardless if there is a number on the main detail screen. Default is blank which includes 800#'s in the time zone calculations. Since the location where the 800# rings is unknown, the time range available to call 800#'s is allowed between 2PM and 8PM.

CREATING A CAMPAIGN

The dialer is integrated with RMEx/Intelec. Therefore, it uses a Work Queue, which is the same set up for working accounts manually. And, the Work Queue (mini-queue file) is created every night automatically or on demand, no different than the pre-dialer environment.

A mini-queue file is created each time a campaign is created. This is the file that will hold the records that are moved into the campaign and that the dialer will call. The mini-queue file can be automatically created each night. You can also build and move records into a campaign *on the fly*.

From the main screen, you will Start and Stop campaigns. You can work with the configuration of a campaign, copy or delete the campaign. You can also send a message to all of the users that are in that campaign.

Preview and Power do NOT require any setup. Predictive and Progressive campaigns do require some setup on both the RMEx (I-Tel) and the Campaign Manager. From now on, when we refer to Predictive, we are including Progressive as well.

CREATING A CAMPAIGN IN I-TEL
(RMEx side)

First, go to I-Tel Campaign Administrator on the I-Tel menu. Now, create the campaign. Select the Campaign type, UserId, Timeframe, etc. Note: The campaign name **MUST** be in upper case. Also, the campaign needs to be set up in I-Tel first, since this creates the mini-queue file (TQ), which is needed in Campaign Manager. Once this is done, you will need to go to the Campaign Manager and set up the same campaign as well as other dialer controls, e.g. call progress, number of retries, etc., to complete the process. That documentation follows:

F6 to create a new campaign.

```
Type choices, press Enter.

   Basic Campaign Information
   Campaign name    . . . . . . . . . . . . . :
    ACONSOLIDATION
   Dialer code    . . . . . . . . . . . . . .        A

   Campaign type    . . . . . . . . . . . . .        4
      3=Progressive
      4=Predictive
      7=Unattended


   Mini-Queue file name  . . . . . . . . . . :       TQA0222IT
```

Campaign Name: This is an alpha-numeric field. Remember, the campaign name MUST be in upper case. Think about the names you assign as your agents will have to type those in when logging into a campaign. Avoid special characters in the name of the campaign.

Dialer code: This field is used if you have multiple dialers attached to one RMEx. If you only have one dialer installed, the default is "A".

Campaign type: Enter the appropriate code for this campaign type. (Unattended no longer in use as it does not use FOTI, if creating an IVR campaign selection option 4 for predictive.)

Mini-Queue file name: The mini-queue file is the actual file that the dialer calls from and every campaign will have a unique mini-queue file. The mini-queue file is shown – but is only created after a new campaign is created.

```
Type choices, press Enter.
Campaign:     ACONSOLIDATION:MAYT/P/000/P
  Campaign Selection Criteria


   User ID   . . . . . . . . . . . . . . . .      MAYT

   Time frame (A,M, or P)  . . . . . . . . .      P

   QCat  . . . . . . . . . . . . . . . . . .      000

   Processing type   . . . . . . . . . . . .      P

     A=Broken promises
     D=Dated follow-up
     G=New business
     J=Work phone
     M=Home phones only
     P=Hot account
     S=Non-collector




 F3=Exit        F5=Refresh        F12=Cancel
```

UserId: This is the UserID where the accounts have been associated with for calling.

Time Frame: Enter the window of time when accounts in this campaign should be called. "A" – in the AM, "M" – in the midday, or "P" – in the late afternoon to end of day.

QCat: Enter the QCat location these accounts will be called from, if used.

Processing Type: Accounts from this specific processing type will be selected for this campaign.

Note: These parameters should match the same details listed under your queue consolidation if you used queue consolidation to select your records for calling.

Allow timed recalls in predictive or progressive: (Y, N) A "Y" will allow recalls; an "N" will not allow recalls in the campaign. **NOTE:** The recall is based on the user who entered the recall. That user MUST be signed into account processing or a predictive campaign in order to get that account back as a recall.

Start campaign automatically: Enter a "Y" if you want this campaign automatically started when the Mini-Server is started. If this field is left blank, you will have to start the campaign manually. We do not recommend using this feature if you are NOT going to have agents log into that campaign right away. If there is a lag time between starting the campaign and agents logging in, an account cached could get worked, and then when the agents log in and the campaign is run, the account would be reworked. We suggest starting the campaigns manually when needed.

Generate idle campaign messages: This is a message that will be sent to a specified user (message Queue) if agents have NOT been connected to a debtor for a specified amount of time. Enter a "Y" if you want messages sent.

Minutes before issuing idle campaign message: How long should the system wait before sending an Idle Message? (In Minutes)

Message queue for messages pertaining to this campaign: Specify the Message Queue the message should be sent to. (Ex: send dialer message to the manager responsible for this campaign)

Message queue library: Specify which library this message queue resides.

Turn on call recording: Enter a "Y" if you want call recording turned on for this campaign, "N" if you want to turn it off or " blank " if you want to go with the system default.

```
                    Change Campaigns                9/27/2012 17:31:27
                                                    System:    S10E9B6C


  Type choices, press Enter.
  Campaign:     ACONSOLIDATION:MAYT/P/000/P
    Advanced Campaign Control Options


     Restart control option (Y or " ")   . . . .       [ ]
     Leave non-connects eligible for recalls? .        [N]
     SIT/AMD control option (0, 1, or 2)   . . .       [2]
     Playback message code   . . . . . . . . . .       [ ]
     Get more phone numbers (Y)  . . . . . . . :       [ ]
```

Restart control options: Enter a "Y" if you want accounts that have already been dialed, but not contacted, to be dialed again when the campaign is restarted. This works with the next option. If you put a "Y" in this option, put a "Y" in the next option too. Otherwise, leave this field blank.

Leave non-connects eligible for recalls: Enter a "Y" if you want accounts that were not contacted, eligible to be re-selected in the same or a different campaign. If you have a "Y" here, you MUST have a "Y" in the field "Restart control option". NOTE: If you wanted this behavior but forgot to set it, you can use the option to "Rework non-contacts by campaign" from the Queue Consolidation Options.

SIT/AMD control option: (0=None, 1=SIT, 2=AMD)

Do you want the dialer to do SIT Tone detection or Sit Tone Detection and AMD (answering machine detection)?

0 = No detection (Note: All connects will go to the collector including Busies, Operator Messages, etc.)

1 = SIT Tone Detection only, so, SIT connects will NOT go to the agent.

2 = SIT & AMD Detection, SIT AND AMD connects will not go to the agent.

Playback message code: If you are doing AMD and want to play a message if an answering machine has been detected, enter the message code here. This will play a single wav file that will not be FOTI compliant. Note: Using AMD Detection will increase delay in connection for about 3 seconds for each call.

Get more Phone Numbers: This is **new** functionality now in place. e.g. An account has 10 **possible** phone numbers coded **P** and you need the campaign to call ALL 10 numbers, a Y would need to be entered in this field.

(please refer to Knowledge base for instructions on how to set up Calling Multiple Numbers by Campaign)

Now that you have completed creating a campaign in I-Tel, you need to go to the campaign manager to complete the campaign setup.

CREATING A CAMPAIGN ON THE DIALER SERVER

If you are creating an Outbound IVR campaign, please review that section before proceeding.

Go to the dialer server and click on the desktop icon labeled **Campaign Manager**. Select "Create" and you will be presented with a window to enter the campaign name and campaign template to copy. The campaign name must be entered in all CAPS **AND** must match the exact campaign name created in I-Tel.

In addition, a default campaign is provided, making it easier and faster to create campaigns. When creating a campaign for the first time in campaign manager, the default setting for many fields can be used. Utilizing the default campaign will allow you to skip many of the fields and ONLY change the fields you need for the current campaign as you progress. If you already have a template to copy from, enter it here. If not, review the **_Default** template provided, modify if needed and save. Then enter **_Default** as the template to copy from when creating the new campaign.

Now, a series of screens to create the campaign will be presented.

(If you are creating a campaign template, the campaign name needs to always start with an underscore '_' in order for it available as a campaign template)

Campaign Type: Select the type of campaign you are creating. This is the only selection required. Leave all other fields set on the defaults. This must match the campaign type that you selected in I-tel.

Enable retry management: Check this box if you want to be able to dial multiple telephone numbers and if you want to be able to retry non-connects. This option utilizes the parameters defined in the 'Retry tab'.

Pool callbacks if agent is unavailable: If there is a callback set up by the agent and the agent is unavailable, the call will be pooled with other similar results. **We DO NOT recommend using this feature.** It means that the campaign will NOT end (agents will be sitting around waiting for a connect until ALL accounts have been retried based on the rules set up, which could be significant)

Pool callbacks on retry: If the call result is a busy or no answer (on the customer side), the call will be pooled with like results.

NOTE – If neither of the Pool Callback options is checked, the default uses the agent outcome.

Wait for retries to become due: This option is NOT recommended since you could have agents waiting a long time for a connect. In essence you could be calling a lot of no answers and busies and never get a connect.

Stop Campaign: We recommend you check this feature. This option will stop the campaign once it has attempted at least every account once. It will attempt the accounts called earlier in the day more than once. This pertains more to accounts that were called earlier in the day and are scheduled for later. Example: You call an account at 9am, you get a No Answer and the retry is set for 3 hours, it will be called at noon. However, if you call an account at 3pm and get a No Answer, the account is scheduled to be called again at 6pm, BUT the campaign has tried ALL of the accounts at least once by 4pm, this account will NOT get called a second time for this campaign run.

Accelerate retries then stop campaign: Again this feature is not recommended as it could cause your agents to have long wait times. However, this feature is preferred over "Wait for retries to become due".

Standalone Campaign: If you do not want your campaigns joined with other campaigns, select this option.

Linked Campaign: These settings are used to set up a master campaign and the campaigns linked to the master campaign allowing accounts to be queued to the agents based on an 'apportioned' or 'ratio' setting for each campaign. The agents log into the master campaign. Then, the master campaign and linked campaigns control what is called and how they are called.

Master Setting: Now, set the campaign based on 'apportion' or 'ratio'. Apportion allows the size of the campaign file to dictate the ratio. Or, 'ratio' can be utilized. Ratio allows the campaign to be set at the ratio you select. So, you can choose to call more records from one campaign verses another based on file counts or the ratio you set.

E.g. Set the ratio to 20 for a 'new business' linked campaign. Then, add another linked campaign of 'older business' to a ratio of 1. This would give more priority to the new business. When the campaign runs, 20 new business records would be called to only 1 older business record. This pattern will run until the campaigns are exhausted or modified.

Telephony resources:
CT Layer Identifier: Only to be used if you have multiple STGs. If you have multiple STG, enter the name of the STG that you wish to use for this campaign.

CLI Presentation: This is the number that you want to show on the debtors Caller ID when a call is made from the campaign. Enter 10 digits, without any dashes. Please double check with your carrier to confirm that they support custom CLI presentation. Some providers do not offer this service.

Default level of call progress analysis:
Native (None) – Nothing is handled by the system. All results are delivered to the agent.
SIT/Tone – The system (CallGem) will handle SIT Detection only. Answering Machines will be delivered to the agent. SIT tones are handled and stamped with a smart code by the system.
AMD/SIT/Tone – The system (CallGem) will handle AMD (Answering Machine Detection & SIT Tone Detection). Therefore, answering machines and SIT tones WILL NOT get delivered to the agent.
AMD+Message – This will play a single wav file and WILL NOT be FOTI compliant. When the system (CallGem) detects an answering machine, the system plays the message entered in the next field. After selecting this option, the message box will be highlighted. Enter the **Symbolic Name** of the wav file you would like to play. (Only include the file name - do not include the extension in the field) Make sure you also set up the Symbolic name in the Name Space Editor in Sound Resources.
AMD+Connect – This option is currently used for IVR campaigns and Mixed campaigns. The system detects if there is an answering machine. If an answering machine is detected, the call is sent to the agent (IVR agent for now).
List Cleaning – No calls are passed to the agent. The system basically dials a number and waits long enough (milliseconds) to determine if the number is bad or not.

Target Abandon Rate (1-20%): 20% is the maximum allowed for dropped calls. The higher the rate, the greater number of calls made, but also dropped. (5% is the maximum allowed for telemarketers. This was increased for collection.)
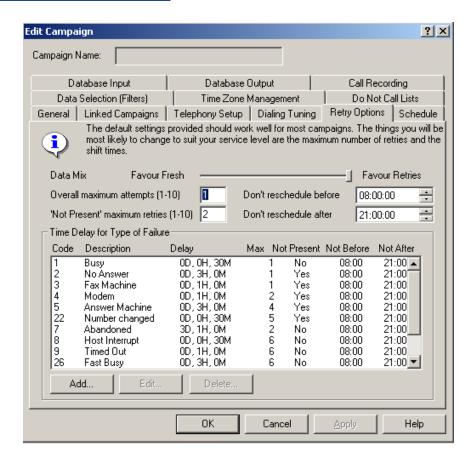
Initial estimated average talk time: Leave default setting. The dialer will adjust itself accordingly, based on the experience obtained during the campaign run.

Abandon delay (0-2s): This setting is the time between a number being answered and the number being connected to an agent. E.g. 1 second means that a campaign contact will not 'wait' more than '1' second from the connect to the delivery of the call to the agent. We suggest leaving the default to 1.

Ring Timeout (15-59s): The amount of time for a call to ring before ending the call. Each call cycle is 6 seconds. So, in this example, a call that rings 2 ½ times would be treated as a No Answer. We suggest setting this parameter to 18 seconds if you want live contact only or 30 seconds if you want machine contacts as well. 18 seconds would be 3 rings and would end the call as no answer before most answering machines pick up. 30 seconds is 5 rings and most machines will have picked up the call. If you have a low ring time, set your call progress analysis to SIT/TONE to avoid the 3 seconds of line detection.

Outbound Skills Based Routing: Do not use.

Tab - Retry Options

The following Parameters are for all Disposition Codes. Once you have set the parameters for all Disposition Codes, you can then set different parameters for each Disposition Code, if desired. To set up specific parameters for a Disposition Code, click on it, then select the Edit button.

Overall Maximum retries (1-10): How many times should the dialer retry calling an account. Example: 4 times for a No Answer – Busies, etc.
Not Present Maximum retries (1-10): A secondary group of codes can be handled differently by grouping them as 'not present'. When editing the specific code, mark it not present.
Don't reschedule before: This should really be your operating hours.
Don't reschedule after: This should really be your operating hours.
To add a different retry Option for a specific Disposition Code, click on that Disposition Code, and then click the Edit button.
Data Mix/Favour Fresh to Favor Retries: This is available in version 10.5.103 or higher. This option gives you the ability to give 'fresh' records (records that haven't been called) priority to be called or slide the marker toward the right to give retries priority.

Tab - Schedule – Do Not use

TAB - DATABASE INPUT PARAMETERS

Note: These fields in green are case sensitive and need to be entered exactly as you see them below:

Data Source Parameters-

Name: Needs to be itel

User Name: ITELODBC

Password: ITELODBC

"Verify Database Connection" (You only need to do this once when creating the "_Default" campaign. <u>You must verify the database connection in order to proceed.</u>

Key Database Fields:

Source table/ view name: Click on the Down Arrow and select "The mini-queue file name associated with this campaign". You can find the file name by looking at the campaign in Campaign Administrator in I-Tel (the first step in creating a campaign). It will generally be formatted like this: **TQAxxxxxIT**.

Telephone number column: If dialing the Home Phone as the primary number, select QIPH1. If you want to dial work phone number as the primary number then select QIPH2.

Unique Key Column: Select QUNIKY.

Order by: Select ascending and QSEKEY.

Cache Size (50-2000): 50 is the minimum and is the recommended. Cache size will adjust as the campaign runs.

Generate Audit Trail: - <u>This field is NOT used by Quantrax, so make SURE that it is not checked.</u>

If you want a campaign to call more than one phone number (if available) you can use the Calling Multiple Numbers by Campaign feature (Recommended method - See knowledge base for additional information) or you can click on **"Alternate Telephone numbers"** and you will be presented with the following screen:

Database Column, Phone#2, etc: This is the second number and following numbers you want to call if the account has more than one phone number (REM: QIPH1 = Home Phone, QIPH2 = Work Phone). You can only specify up to 5 numbers which would include QIPH3, QIPH4 & QIPH5. You can also repeat these entries in the campaign.

QIPH 3 is generally a cell phone unless overwriting this code at the Phone Control File and QIPH4 & QIPH5 is used for any other Phone Code.

Call Progress Analysis: This field allows you to specify the type of call progress analysis setting you want to apply for each phone number. However, remember that if you are marking Home phones as 'Detect AMD', you do not want to detect AMD on the work phone…it would waste time. Also, you cannot choose a setting higher than the global setting filled in on the 'Telephony Set-up' tab.

E.g. If you have the default set as SIT Tone Detection, you would not be able to do AMD at the Phone Number level. If you had AMD set at the default, you could do SIT at the phone number level because AMD has a higher priority. The Priority order is as follows, from lowest to highest. Native – SIT – AMD+Message – AMD Connect.

NOTE: Default - will use the setting that you have specified in the Telephony tab. (in campaign manager – on the Telephony Setup screen)

Retry using only one number: If selected you will NOT call a second number.
Exhaust each number's retries before moving on to the next phone number: Check this field if you are calling multiple numbers for the debtors and you do not want to call the next number **unless** you have met the retry rules for the current number. Example: If you said to retry a busy every 15 minutes for a maximum of 3 tries, the second number would not be called until after the third busy.

Try each number on a round robin basis: Select this field if you are calling multiple numbers and want to call them in turn until all of the retry criteria have been met. This is similar to the option above but you are not waiting until the first number has met all of its retry criteria.

Make X calls for each phone number: By selecting this option you can specify how many times you call each number.

Immediate retry of 'not present' using next number: Not recommended. Select only if you have a campaign calling home phone first and work phone second and if the account does NOT have a home phone number, the work phone number will be called immediately.

One shot at each number: The first number is called – if there is a contact (live response), then you are done with that specific number. If it is not a live response, then immediately dial the next number. Goal is to ensure that each number in a 'contact' (live response) is only called once.

Immediate retry of not present, earliest number: Similar to the prior option 'Immediate retry of 'not present' using next number except that the next number is dialed immediately after the prior number for the first attempt only. Then the retry settings will take effect for each additional outcome and will schedule the next try accordingly.
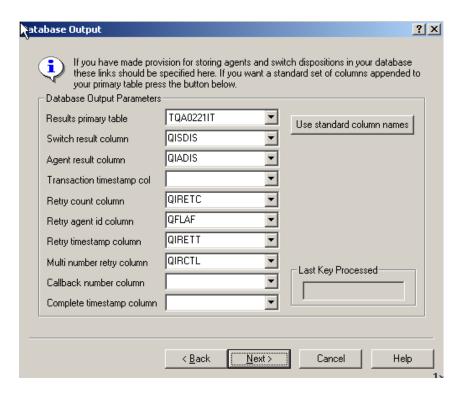
Retry Totals:

Apply retry management totals to each phone number: Make sure that this option HAS been selected if you have a debtor with both a Home Phone and a Work Phone and you want the second number dialed if you did NOT have a contact on the first number.

Treat retry management totals as total for all numbers: On the tab "Retry Options" you have a field called "Overall Maximum Retries". The number you have entered there pertains to the maximum number of times that a number will be retried. So, selecting this field lets the system use this value as the total number of times attempted to contact the debtor.
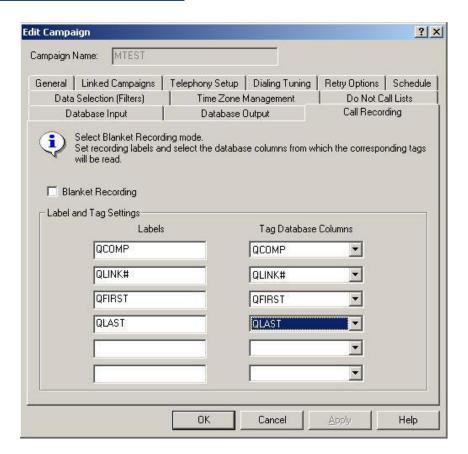
Use Priority Column: Leave the default

Results primary table: This needs to be same mini-queue file as specified on the Database Input tab.

Make sure that the rest of the fields displayed in this example are identical to the campaign you are creating. If not completed correctly you could experience issues such as files not updated on RMEx, incorrect retries and inaccurate reporting data.
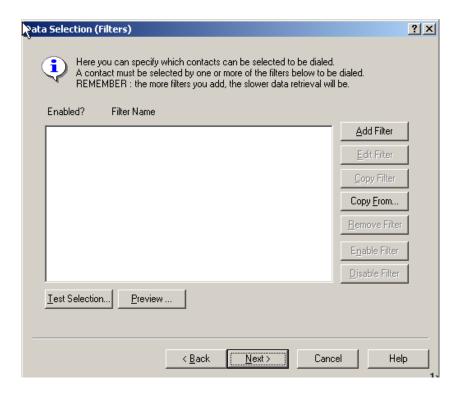
Check the field "Blanket Recording" if you want calls recorded for this campaign.

Set up the Labels and Tag Database Columns as displayed in the image above. This is used for the custom tags in the new web based recording viewer (version 10.5.105 or higher). These tags give you greater flexibility allowing you to search by case# number or name with the new recording viewer.
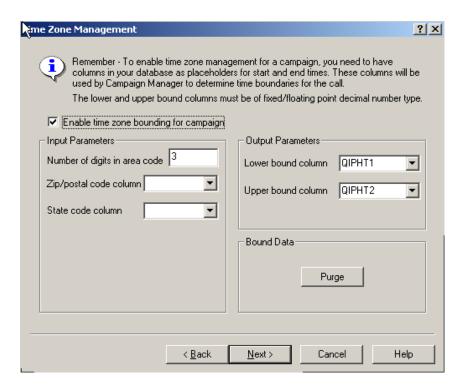
Tab – Filters

NOTE – <u>Filters are NO LONGER required</u> if you are building a campaign using processing types for Home Phones or Work phones. However, if you build a campaign for 'broken promises' and you are calling the home phone; you do NOT know if that particular account has a home phone (it could have a work phone). In this case, we suggest you click on Add Filter. Name the filter and add the 'condition' —'home phone' 'not equal' to '000000000000' (12 zeros). This will eliminate the campaign stopping because it came across a large patch of accounts that do NOT have a phone number.

NOTE: - Remember, the Filters fall under the 'OR' logic and the conditions outlined within the filter fall under the 'AND' logic. For example, if there are two filters listed for this campaign, the rules would follow FILTER 1 or FILTER2, but within FILTER 1, condition 1, 2 **and** 3 would have to be met.

TAB – TIME ZONE MANAGEMENT

Please check the 'Enable time zone bounding for campaign' to allow time zones to be adhered to for the campaign.

Input Parameters:
    Number of digits in area code: Put a 3
    ZIP/Postal Code column: Leave blank
    State code column: Leave blank

    Output Parameters:
    Lower bound column: Click on the Arrow Down button and select QIPHT1.
    Upper bound column: Click on the Arrow Down button and select QIPHT2.

TAB – DO NOT CALL LIST – NOT IN USE

    NOW Click finish and the campaign is ready to accept accounts.

OUTBOUND IVR CAMPAIGN

Creating a campaign for an Outbound IVR is very similar to creating a standard predictive campaign. There are only three elements that are specifically needed to differentiate an IVR campaign from a Standard campaign. So, please follow the steps outlined for a Standard Campaign **but** make sure you include the following items:
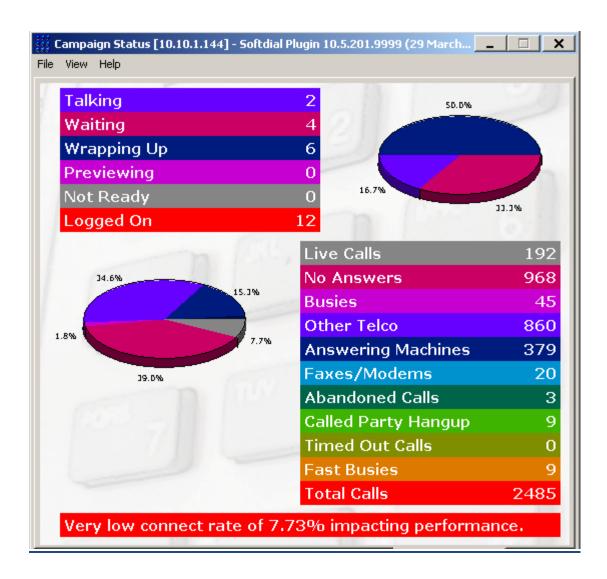
- Campaign name must begin with IVR
- Campaign can ONLY be set up for Predictive or Progressive
- Campaign must be set up for AMD + Connect (Through Campaign Manager, go to the Telephony Setup screen. Under Call Progress Analysis you have Default Level of Call Progress Analysis. Please select AMD + Connect from the drop down box)
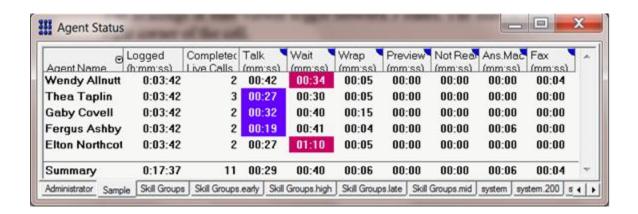
Note: If you are running a Mixed campaign (IVR agents along with real agents), the campaign needs to be setup the same way as an IVR only campaign. If a machine is detected and is given to a live agent they will not hear the answering machine greeting but will get a pop up box on RMEx to notify them that they are connected to an answer machine.

CAMPAIGN STATUS

This will display the campaign information.

You can use this application to monitor the performance of your inbound and outbound campaigns. If you select the tab with the campaign name, it will show the activity on the campaign real time.

The 'Agent Status Display' window will show key metrics such as talk and wait time. these metrics can be displayed in 3 different ways by clicking on the coloured indicator in the column heading. By clicking on the heading you can toggle between the following options:

- **Averages** - blue indicator
- **Time per hour** - yellow indicator

Time in last state - green indicator

MANAGEMENT OPTIONS (I-TEL)

(RMEx)

CREATING HUNT GROUPS IN I-TEL

Hunt groups are called 'queues'. It is a mechanism for routing inbound to a single agent or a group of agents.

Hunt Groups are used to specify an individual extension or groups of extensions that will be eligible to receive IB calls. This will include any agent, virtual agent (Inbound IVR), voice mail and non-nailed up extensions (NNE).

Group code: Enter a unique code identifying this HG. (This code is used when adding a group to an existing "hunt group members") The field accepts alpha and numeric entries. The group address can also be used for this field.

Group name: Enter a description of the group (ex: Medical collectors).

Group address: <u>Needs to be numeric</u> and **cannot** be identical to a valid extension. This code will be used in the fields labeled **ID** & **Queue ADDRESS** on the Name Space Editor in the Softdial Control Center

Note: This field needs to be in the 700000 to 799999 range. Tip-use the DNIS as the last 4 digits of the group address. Ex. 701288 easier to associate with the I-Tel server.

Valid group addresses (preferred):

- 200000 **Used ONLY for blended transfer queues**
- 500000 **Call blended queues**
- 600000 **IVR queues**
- 700000 **Standard queue for multiple agents**
- 800000 **Standard queue for a single agent**
- 900000 **Standard queue for NNE's and VM (these queues are NOT set up in I-Tel)**

Inbound Campaign Name: This field should remain blank for all system campaigns. If this HG is going to be used for Blended Inbound calls, you MUST type in "INBOUND" all in upper case in this field.

Voicemail extension: Enter the VM extension associated with this HG. Example: If the VM extension is 450, you will need to set up a 900000 series HG in the Name Space

Company number: Enter the company number associated with this HG.

Note: If you leave this field blank the system will present any account from any company to this hunt group.

Dialer code: Enter the dialer code associated with this HG. The default code to enter is an "A" unless you have more than one dialer installed.

Hunt Group Type: Valid entries are blank, T and I.

Blank – standard default

T – If you are setting up a blended transfer queue. When setting up a blended transfer queue, e.g. 200101, where 101 is the outbound extension, the queue would need to have a 'T' in the hunt group type in order for agents to 'transfer' a call to the OB extension of the blended agent.

I – if you will be sending callers to an IVR script. When setting this up you would place a 'Y' in the hunt group type for the IVR queue. This will allow agents to send the call to the IVR script <u>for this queue</u>.

ADDING MEMBERS TO A HUNT GROUP

Once you have created the HG, you need to add members.
To add members, put an 8 in front of the HG and press enter. F6 will allow you to add a member.

*Sequence: Enter a sequence number. It is best to add them in increments of 10, this way you can always add an agent later.
Note: The sequence number is also used to distribute calls based on priority order on the I-Tel server. Ex: Using priority order, if you had 5 agents in the group with sequence numbers of 10-20-30-40-50, the agent with the lowest sequence number would always be offered the inbound call first if that agent is available. (We recommend using round robin for call distribution, in which case the sequence value is irrelevant.)

You must choose only one of the following options:

User: Enter the valid Intelec UserID. Whenever this member signs in, they will automatically be logged into this HG at the extension that they specified when logging in. This is useful if you always want this agent in this HG and they do not sit at the same desk (extension) everyday. All NNE's must use this option. VM should be set up at the valid extension level.
Or Extension: Enter the IB extension number. This member is associated to the phone extension. No matter who sits at this station they will log into this HG. VM should <u>not</u> be set up at the valid extension level.
Or Group: Enter the group code if you want **to** add another HG (more agents). This is useful if you have an unusually large download and want to temporarily add several agents to a group.

CREATING HUNT GROUPS ON THE DIALER SERVER

Hunt Groups are used to specify an individual extension or groups of extensions that will be eligible to receive IB calls. This will include any agent, virtual agent (Inbound IVR), voice mail or non-nailed up extensions (NNE).

1) Get the table of DNIS numbers from your carrier. (this is typically the number the provider uses to route your calls to you)
    a. If your provider is not accessible or you cannot obtain the DNIS list, call the number you need the DNIS for, look at the STG logs and obtain the DNIS.

2) Go to the Name Space Editor and create Incoming Call Routes.

a. The incoming call route associates an incoming DNIS and or CLI with a specific queue address (HG). The route controls where an incoming call should first be directed.
b. Incoming Call Routes MUST be set up for any numbers that would be coming through the dialer.

Now you need to create an Incoming Call Route. You need to set up the incoming call route for 1.800.555.1288 ---

From the Name Space Editor, highlight "Incoming Call Route", click "Add Data Item" and fill in the items below:

ID: The carrier generally assigns a different number to each number in a trunk group. It is known as the Dialed Number Identification Service or DNIS. For example, if the number in the trunk group is 301.455.9549, the DNIS would probably be 9549. When a consumer calls this number the DNIS is routed from the carrier. So, you would enter 9549.
Route Name: This is a required field. This is an Alpha Numeric field summarizing the purpose of this IB Route. Example: DNIS 1288 could be the DNIS for the extended business office (early out calls). The DNIS could be a number representing "ABC General Hospital". Since this field is displayed when viewing the Name Space Editor, it is recommended that a useful route name be used. Some examples are: 800-555-1288 or IB 800-555-1288 or IB to HG 700XXX.
Description: This field can be used to further define the purpose of this IB Route. Suggested use is to enter the actual number that represents DNIS 1288. ABC Gen Hosp Early/800.555.1288, Early out IB to HG 700XXX or 800-555-1288 ABC Gen Hosp/Early
CLI: You can enter the area code or the area code and the exchange. Or, you can enter the entire number that the caller is calling from. Combined with this entry and the DNIS, the call will be routed to the destination address (queue/HG)
DNIS: This is a required field. Enter the DNIS that the carrier sends to you when passing the call to your location for that number. This can be obtained from the carrier and a copy should always be on the premises. At minimum, this field is required, but can be used in combination with the CLI entry to direct calls to a specific group of agents. E.g. 800.555.1288 needs set up. The carrier delivers 1288 to your location when routing these calls to you. 1288 is called the DNIS for this number. Enter 2323 in the DNIS field.
Destination Address: - This is where you specify the HG address you want the call routed to. If the DNIS belongs to an individual agent use HG 80xxxx, if not, use 70xxxx or the like.

Click OK when complete.

3) Verify that HG's have been created in I-Tel.
    a. You should have already created a HG in I-Tel. If not please do so now.
        i. We suggest that you create your **HG's in I-Tel** using the standard codes ex: 70xxxx where xxxx is the IB extension – this is NOT required but preferred.
    b. You should have created your extensions - "Valid Extensions" - in I-Tel – If not, do so now.
    c. ***You should have added members to the HG.**

4) Create hunt groups on the dialer server.
Three types of HG's can be set up in dialer server. They need to be set up in the name space editor.

VoiceMail HuntGroups: -
This HG is set up on the dialer server in the name space editor under _tenantConfig/default/Campaigns/system/Queues and will correspond to the extension that you have created in I-Tel as a voicemail. This HG tells the dialer server what extensions are used for voicemail and NNE's on the PBX. Anytime you have VM or create a NNE you MUST create a 900000 series HG ex: 90xxxx where xxxx is the extension for the VM.

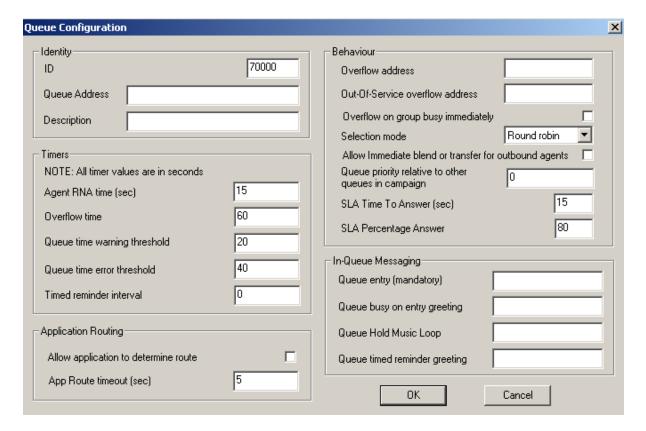**InBound Extension HuntGroups: -**
This HG is set up on the dialer server in the name space editor under _tenantConfig/default/Campaigns/system/Queues. This HG tells the dialer server what extensions are used for IB calls (Note: No I-Tel setup is necessary for 800000 series). Anytime you have an IB extension you MUST create an 800000 series HG ex: 80xxxx where xxxx is the IB extension. **Leave the overflow option blank.**

Agents InBound and IVR HuntGroups: -
This HG is set up on the dialer server in the name space editor under _tenantConfig/default/Campaigns/system/Queues. This HG 700000 is used to distribute calls to groups of live agents in a specific routing order. E.G.: Round robin or priority order. The HG 600000 is used to distribute calls to groups of virtual agents. These HG's must match the HG's created in I-Tel. We suggest that you create these HG's by following this convention - 70xxxx where xxxx is the agent IB HG and 60XXXX is the last four digits on the IB phone number. **This is NOT required but preferred.**

NOTE - To get to the Name Space Editor on the dialer server, right click on the Softdial Control Center icon in the lower right hand corner . Open the Name Space Editor.

For the Queue (hunt group) on the dialer server -

ID: Enter the 700000 (Agent IB HG) code that you created I-Tel or enter an 800000 (which IS NOT set up in I-Tel AND it represents the IB extension HG) or 900000 (VM or NNE HG).
Address: Enter the same number as the ID above.
Description: Enter a description for this HG.
Campaign (blank system): Please leave blank
Agent RNA time: Specify in seconds how long the IB call **should ring at an agents extension before rolling over to the next available agent** in the case the first agent did not pick up the call. Note: One ring cycle equals 6 seconds. (Not applicable to blended HG.)
Overflow Time: Specify in seconds the total time a call should be offered to agents within the HG before rolling to the overflow address. This number will always be greater than the Agent RNA time. To calculate the overflow time you need to determine the maximum number of agents that you want the system to offer the call to. Then multiply this number by the Agent RNA time. Ex. You want to ring a maximum of 3 agents. So, 3 x 18 seconds = 54 seconds. The system will send the call to the overflow address for 54 seconds. Keep in mind the debtor can hear the phone ringing for up to 54 seconds before rolling to the overflow address.
Allow Application to Determine Route: This is for individuals that have a separate dialer or different telephony gateway.
App. Route Timeout: Leave the default at 5.
Overflow Address: This field is used in the case where no agents are available to accept the IB call. Enter the address that you would like that call to be routed to. This could be the address of a VM or another HG.
     Note: Each type of HG has specific values for the overflow address. They are:
          1. Voicemail huntgroup (900000) - the overflow address needs to be the voicemail extension on the PBX.

2. Inbound extension huntgroup (800000) - The overflow address has two possible values:
   ➢ If you have a voicemail extension set up at the Work with Valid Extensions options in I-Tel you will need to enter a 90xxxx HG.
   ➢ If you have a voicemail extension set up at the Work with Hunt Group options in I-Tel you will leave this field blank.
3. Agent inbound huntgroup- The overflow address has two possible values:
   ➢ If you want this HG to roll to a voice mail enter the 90xxxx HG.
   ➢ If you want this HG to roll to another HG enter the 70xxxx HG.

Overflow on Group Busy: If ALL agents in this HG are NOT available and you want to skip the overflow time and go straight to the overflow address, click this box. (Do NOT check this box if it is a blended HG.)

Selection Mode: We recommend setting this option to round robin. This will evenly distribute calls to agents depending on which agent is available.

The option order will give the calls to the agents in the order indicated based on sequence number when setting up the agents in the hunt groups in RMEx.

Do not use the ring group option.

Allow Immediate blend or transfer for outbound agents: Check this box if you are setting up a blended hunt group.

Queue Priority: Future functionality – leave at zero.

SLA time to answer (sec): This is for the service level agreement at which you want your calls to be answered by. E.g. Your client wants your inbound calls to be answered within 30 sec as per your SLA. This value can be seen on the status viewer in order to allow you to monitor your inbound service levels.

SLA percentage answer (sec): This is the percentage of inbound calls that must be answered within your SLA time. E.g. Your client wants your inbound calls to be answered within 30 sec as per your SLA and 80% of your inbounds must be answered within this time. This value can be seen on the status viewer in order to allow you to monitor your inbound service levels.

Queue Entry Greeting (mandatory): Please enter a wav in this field. If a wav is not entered, the caller will not hear anything until the agent picks up the call or the call is moved to busy or hold – where the busy wav or hold wav would play. The wav will play to completion before the call is routed to an available agent so don't make the wav too long. Please do not include the extension – E.g. the wav named 'greet.wav' would be entered as greet.

Queue Busy on Entry Greeting: Please enter the wav to play when the agents in the hunt group are already on a call. The wav will play to completion. The wav will NOT stop when an agent becomes available. (Enter only name of wav. Please do not include the extension – E.g. the wav named 'busy.wav' would be entered as busy)

Queue Hold Music Loop: Please enter the wav to play when the agents in the hunt group are in wrap. This wav will continue to loop until the agent becomes available or the overflow time is reached. (Enter only name of wav. Please do not include the extension – E.g. the wav named 'hold.wav' would be entered as hold)

Queue Timed Reminder Greeting: This wav is tied to the Timed Reminder Interval. This wav plays after the timed reminder interval value expires. The wav will stop when an agent becomes available.

Click OK when finished.

*Note: Changes made to hunt groups and incoming routes will take into effect once you click "OK". A recycle of services is not required. If you have added agents to a hunt group they will take into effect once the agent signs out and back into the dialer.

DO NOT CALL NUMBERS

This option can be controlled at the company level or across ALL companies.

```
                      Do Not Call Numbers


          1. Define numbers for all companies
          2. Define numbers for the individual company



          Select an Option  [  ]




                            Phone numbers can be specified with
                            area code only and 7 zeros, area
                            code, next three plus 3 zeros, or
                            complete phone numbers. This allows
                            complete area codes or exchanges
                            to be added to the do not call list.




  F7-Cancel
```

Option 1: Define Numbers for All Companies. This option allows you to create a list of DO NOT CALL numbers for all companies. If no calls can be placed to an entire area code, you can enter the area code followed by all zeros (3010000000). If no calls can be placed to a specific Area Code and Exchange, enter it as 3015640000 or enter the entire number 3016572084 where needed.

Option 2: Define Numbers for the Individual Company. This option allows you to control the DO NOT CALL list at a specific company level.

I-TEL MINI SERVER STATUS

Stopping and starting services for the mini-server.

Mini-server:
Go to the I-Tel server status. Place your cursor in the OPT field in front of code "A".
The default dialer code is A. If you have multiple dialers, please go to the correct dialer code.
Option 1: To start the server
Option 2: To end the server
Option 6: Will print the logs for that particular dialer.
Option 7: Will present logs for all of the messages occurring between the dialer and the RMEx. This option is used for support purposes.

Note: If the Mini-server cannot be started or is stuck in 'starting' or 'ending', please force the mini-server down by going to the I-Tel menu, then taking option 4 Management options, then option 12. *Force mini-server down after an abnormal end, or if*
mini-server cannot be started

^^^^^

NOTE: Dialer server – to recycle services on the Dialer Server (dialer PC): Right click on the Softdial Control Center icon and select 'Service status'.

1. Make sure the Mini Server (RMEx – I-Tel) is stopped first
2. **Go to the Softdial Control Center on the dialer server.**
3. **Open services.**
4. **STOP services**
5. **START services**
6. **Go back to the RMEx and start the mini server**

QUEUE CONSOLIDATION OPTIONS

This option is mainly for meeting the need, even if immediate, to move accounts residing in multiple work queues to a single work queue. For example, with a single users work, you can take all of the processing types and combine them into one queue. In essence, you will take some or all of their Processing Types and pull them into 1 location, e.g. 1 QCat. You can also take the work queues from multiple users and combine them into a single users work queue as well as several other options.

Note:
Since multiple queue consolidations can be set up there is a hierarchy to consider. 'First pass' codes will run first in the following order: Blank, Character, Alpha then Numeric looking at the first digit. Then non-first pass codes will run following the same order. If an account is selected in a 'first pass' run, the account cannot qualify for another code. If an account is selected in a 'non first pass' run, the account can qualify for a subsequent run and end up moving to a different campaign.

Consolidate Accounts for a Single User -

This option allows you to combine a single users' work into 1 or 2 QCats based on the existence of home phone and work phone numbers on the account.

Multiple User Consolidation Rules (Nightly Processing) -

This option allows you to take accounts from multiple users and move them into a single user ID. You can choose up to 8 users or you can choose more users by selecting a Dialer Group Code. You can select multiple processing types or all of the processing types. You can include multiple QCats and omit others. You can also present the accounts by date last worked, external score or internal score. In addition, this option can be run immediately instead of going through a nightly. All that is needed is to hit F10 when you have gone through your selection, and the consolidation will occur immediately.

This feature also allows you to create large campaigns, remove accounts from campaigns and create new calling lists during the day. The differences between the two options are that Multiple User Consolidation Rules options only look at the User ID selected to pull accounts into the campaign. The Multiple User Consolidation Rules by Client option, allow you to select a range of clients and User ID to pull accounts into the campaign. There are a number of options to select or omit accounts in both of these features.

While many folks have already worked within Intelec or RMEx, below are some options you may not be familiar with:

- **Run on MTWTFSS (Y) or Blank = ALL:** This option allows you to set up a consolidation and specify the day or days you would like it to create your campaign. The day of the week is always considered based on the next working date if the option is called as part of the nightly process. If the option is run during the day, using F10-Run this consolidation now, this field will be ignored even if it has been set up.

- **Bypass every Xth account:** This option allows you to move only some of the eligible accounts into the new queue. If you want to move one account and leave the next account in the collector work map and so on, you would put a "1" in this field. A reason to use this may be if you want to work some of a user's queue on the dialer, in a predictive or unattended campaign and have the collector work the queue at the same time.
- **Del. If worked/contacted (C) within days**: If you want to delete all accounts worked within a certain number of days from account processing and in the consolidation, enter the number of days. Note: if there is no last worked date or contact date on the account, this option will be ignored.
- **Payment within days:** If you want to delete accounts with payments made within a certain number of days from account processing and the consolidation, enter the number of days.
- **Cont:** Enter a "C" if you want to delete only the accounts with contacts made within a certain number of days from the account processing and consolidation. Attempts will not be deleted.
- **Omit, do not delete:** Enter a "Y" if you do not want to delete the remaining accounts from account processing **and** only *omit* them from the consolidation. This is necessary to include IF you need to work the accounts that were not included in the selection from the units you are pulling accounts from in the queue consolidation run.
- **Change within to prior to:** This field is used the change the wording "within" to "prior to" in the above fields "Del. If worked/contacted (C) within_____days or payment within_____days Cont." A "Y" in this field will select accounts **prior to** (older than) X number of days instead of within (recently worked) X number of days.
- **Sort by:** Specify the account sort within the processing type order that I-Tel should use when dialing the numbers. You can choose 1 = date last worked, 2 = Balance, 3 = External score and 4 = Internal score. When selecting 2 (balance), the sort will look at the linked balance of the account.
- **With phones:** This field has been expanded. The 'W' option would include accounts with a work number, but they could have also included a home number. Now, accounts that have ONLY a cell or a work number can be isolated by using a lower case 'c' or 'w'. Additionally, if there are no numbers on the main detail screen AND a valid number is available on the Tab+ screen, you can pull those accounts by using the new code '+'.
- **Special Sort Code:** Enter sort code option. This will further sort your campaign. See Menu option 12 of the Queue Consolidation Menu to set this option up.
- **F10 Run Now:** This feature can be used to run the consolidation now and not wait until nightly processing.
- **F12 Run in Batch:** This option will create the campaign on demand, but reduce the CPW (related to interactive processor resources). This will help balance the system workloads, allowing you to allocate interactive resources to the jobs that really need them.

Account processing - Special transfers -

This option allows you to select certain owners and workers and move them to one queue. You can select specific clients, QCats, and a certain placement date range. In addition, you

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can select open or closed accounts or legal accounts only. Then, you can transfer these accounts to a specific user ID, QCat and processing type.

Note: This feature looks at **SCACCT** (Account Master File) which means if you are not careful, you could end up selecting accounts that are already in another users queue(s). If you encounter a problem like this and need to reverse the transfer, see option 'Re-create queue by worker code'.

Re-create queues by worker code -

This option allows you to re-create work queues as if you had gone through a nightly process. It can also be used if you accidently sent the wrong accounts to another UserId for a campaign. This option will put the accounts back where they came from. You would enter the 'worker code' for the agent queue that needs re-created.

Please Note – The work maps will NOT be re-built. You can view them by going through the audit options and displaying the work map, then select 'current status'.

Re-sort work queues by client –

This option is found on the I-Tel Queue Consolidation Menu, option 5.
You can select the worker code or User ID for the sort. You can prioritize by client code if needed and present those client accounts in the order listed. Below are additional selection criteria to choose from:
- Processing Types
- Time Frame
- QCat's other than 000 – you can select up to 4 additional QCat's
- Omit QCat 000
- Select All QCat codes
- Sort by-last work, balance, external score or internal score
- Placement date range
- Last worked date range

You can use this feature to sort a campaign while it is running if you need to prioritize a certain client. This feature can also be used with the collectors standard work queue.

Multiple user consolidation rules by client (Nightly Processing) -

The Multiple User Consolidation Rules *by Client* option, allows you to select a range of clients and User ID to pull accounts into the campaign. There are a number of options to select or omit accounts as outlined above.

NOTE: This option is run *after* the option <u>Multiple User Consolidation Rules (Nightly Processing)</u>

Rework non contacts by Campaign -

This option looks at all records in a campaign and if the record has not had a *contact* smart code applied, it will reset the QWORKF to allow the record to be called again.

Rework non contacts by Queue –

This option looks at all records in a queue and if the record has not had a *contact* smart code applied, it will reset the QWORKF to allow the record to be called again.

Queue sorting options -

Sorting has been greatly enhanced with this feature. You currently have the ability to take a campaign and change the sort priorities quickly AND often through the Re-sort option in Campaign administrator. However, this expanded feature allows for much more.

As an example, you may have 25,000 accounts in a campaign. You start the campaign. After some time, you may analyze the campaign and want to move a group of accounts ahead of the others already at the top of the list. Selecting the 'Re-sort' option will allow you to make this change immediately. However, what if you only wanted to move accounts within this group if they were in a specific state, had a specific area code or zip code. Or, if you had 30 client numbers in the group and did not want to include 3 of them in the re-sort.

This expanded option allows you to sort accounts in some interesting ways.

The concept is to have a system control file of "Sort Codes". These codes will also be tied to campaigns. A sort code will allow you to:

- o Prioritize (move accounts to the top of the campaign)
- o Sort the campaign
- o Push phone numbers from the Tab + area into the phone fields on the dialer queue.

With RMEx and I-Tel you can automate the manner in which accounts get selected for work and how often they are attempted. These options extend this capability and give you more options to effectively cover your account base.

NOTE: From the Queue Consolidation options, select option, 12 "Queue sorting options". When you select option 12, you can create/select a "Sort Code" and set up the options for

that code. This same area can be accessed from the 're-sort' option available through Campaign Administrator from the I-Tel menu.

```
                        I-Tel queue sorting options

  Sort code        DI                                              --SORT--
  Description      OMIT CL#000133 AND 000275                       Seq   Ord
                                                                   A,D 1-2

  PRIORITIZATION      Time zone (EWCM)    [    ]       Phone source code   [  ]
   (Selection         Zip codes           [   ]    to  [   ]
  moves account       States              [  ] [  ] [  ] [  ]
  to top)             Area codes          [    ] [    ] [    ] [    ] [    ] [    ]
                      Clients  (I,O)   O   000133      000275     [      ] [      ] [      ]
                      Groups   (I,O)  [ ]  [      ]    [      ]    [      ] [      ] [      ]
                      Contact (YNR,1-9)  [ ] [ ]  Number means that or more (Y)   [  ] [  ] [  ]
                      Attempt (YN,1-9)   [ ]       Number means that or more (Y)   [  ] [  ] [  ]
                      Letters# (YN,1-9)  [ ]       Number means that or more (Y)   [  ] [  ] [  ]
  Custom fields       [          ]    [          ]
                      [          ]    [          ]
                      [          ]    [          ]
  UDW fields          [          ]    Code, line, positon, length    [  ] [  ] [  ] [  ]
                      [          ]                                    [  ] [  ] [  ] [  ]
                      [          ]



  F7-Cancel      Press ENTER for next screen
```

This screen gives you options to "prioritize" accounts within a campaign. If any of the selections are met, the account is pushed to the top of the campaign. If none of the conditions are met, the account gets dropped to the lower part of the campaign.

Please Note: The custom and UDW fields will need to be reviewed with Quantrax before they are used. The other options are active.

Some additional information -

- o Contact can be Y (Yes), N (No) or R (right party contact). For the Y option, you can specify a number of contacts. This does not apply to the N or R options.
- o For some fields you can define a "Sort Sequence" and a "Sort order". Sort Sequence is ascending or descending, and must be specified if the option is used. Sort Order refers to whether the field is a primary or secondary sort field. As an example, if you wanted to 'prioritize' the queue by calling the 'contacts' by 'sort order' of Score 1, you would put a 2 in the contacts field and a 1 for 'Score 1' in the Sort order column (on a different screen). FYI-for Score 1, you would need to also choose ascending or descending for the sort sequence.

The next screen gives you sort options. This allows you to sort within the prioritization. Here is a sample screen. This screen also has phone number options.

```
                    I-Tel queue sorting options

Sort code      DI
Description    OMIT CL#000133 AND 000275      Sort Seq.        Sort order
                                              (A,D)            (1-2)
SORT OPTIONS       Date last worked            A                2
                   Balance                     D                1
(* Primary is    * Score 1
 considered)     * Score 2
                 * Score 3
                 * Internal score
                 * Age at placement
                 * Age since placed
                 * Age from last transaction
                 * Days since last letter
                 * Cost to balance ratio


PHONE OPTIONS      Home, work, Tab+ (H,W,Tab+, *)    _ _          (Home, work can
                   Omit most recently called (Y)                  not be changed)


 F7-Cancel        Press ENTER to update
```

Here, you can select sort options. Remember, you can only specify **TWO** sort options, one primary and one secondary, designated by the sort order of 1 or 2. Remember that for some of the options, we only consider the primary account.

The "Phone options" allow you to target up to 3 phone numbers based on phone codes in the Tab+ screens. Even though you see 5 fields on the screen, the first 2 cannot be changed. These are reserved for the home and work numbers from the account detail screen. Simply put the codes you require into fields 3, 4 and 5 that correspond to the last 3 phone numbers in the queue file used for calling. (The queue file has 5 phone number fields) If you enter a code in any of the 3 phone fields, the phone number corresponding to that position (in the queue) is cleared and a new number is loaded from the Tab+ window, into that specific phone number in the queue (SCCQUE). If a code is not specified in a certain position, it is not modified. E.g. If you have _ _ _NN in the 5 codes, the first 3 phone numbers in the queue file will be unchanged and the next two numbers will be loaded with numbers that have N codes.

You can also use the * option to say load any number other than the numbers from the account detail screens into the 3 additional phone number fields!

Note that you can also tell the system to load the numbers based on the numbers that have not been called for the longest time! This will allow you to target one group of accounts on one day, come back the same day or on another day, and call the other numbers for the same account, not having to worry about what was already called. This offers optimal coverage of phone numbers!

Of course, based on how the system is set up, you can have the system disable specific types of numbers after a certain amount of effort or based on the connection status of the

call! Unfortunately, these options are only available with RMEx and I-Tel, since we have to work closely with the dialer to track the results of every attempt and phone number that is called.

You have now set up the sort codes. To use this go to the Campaign Administrator option. Take the option 5, to re-sort the campaign. Now take F5 to change the campaign using a sort code.

Simply select the sort code you want to use, and press ENTER. The campaign will resort dynamically without requiring agents to sign out or to stop and restart the campaign.

ADVANCED OPTIONS

OTHER PHONE NUMBER OPTIONS

These options are used to define phone numbers on an account that are NOT the Home, Work or Cell numbers on the First Detail Screen. By default the phone numbers on the first detail screen are coded:

H = Home
W = Work
C = Cell

Numbers other then Home, Work or Cell are stored in the TAB+ screen.

Then, you can specify which code is associated with QIPH3, 4 and/or 5. You can also specify that you want a specific code to be treated as a Home, Work or Cell phone. Once the association is made, the new phone code can be included in the campaign.

So, you can create an association between a 3rd, 4th and 5th phone number and select the order in which they are to be called through the dialer. Or, in addition to the home and work number, you can include a third number QIPH3 and code it as N for Neighbor. Then the dialer can pull numbers coded with a capital N and place a call, as long as QIPH3 is included in the campaign.

Lastly, these options are used to associate up to 5 Phone codes with a campaign. This is done by associating the phone codes with a database field that the software on the Dialer PC (Softdial) can understand.

Option 1: Other phones System Control File: This option is for creating and maintaining Phone Codes that will go into the Tab+ Window. Remember, Phone Codes H, W&C are reserved for the system. You can create Phones such as "N" for neighbors, R for relatives, etc. This option also allows you to define the number of attempts allowed before considering the number disabled (Lower Case Phone Code) – or not eligible to be dialed.

Option 2: Other Phone Number Selection Rules: Note: There are 5 available fields that can be used to store phone numbers to dial within a campaign. The fields are known as QIPH1 (Home Phone), QIPH2 (Work Phone), QIPH3 (Cell Phone), QIPH4 & QIPH5 – which can be used for any other phone number code. (QIPH3, depending on how you set up the sort order, can be substituted with a different Phone Code)

Option 3: Calling Multiple Numbers by Campaign: ALL the numbers on an account can now be called. Make sure you have the phone codes set up and added to the 'Other phone number selection rules'. Place the phone codes in the order you need called. If you do not want to call ALL of the numbers listed for a phone code, you can select the number yourself.

For detailed instructions on how to set up calling multiple numbers by campaign, please review the article Calling alternate phone numbers in a specific order.

SUPPORT OPTIONS

These options are primarily used for handling certain issues, such as, an agent that may have logged out incorrectly and cannot get back into the dialer. (Reset agent)

Another situation that could occur is where the dialer and the RMEx have gotten out of synch (power outage). The mini-server may need to be 'forced' down. Generally, this option is reserved for times when the mini-server will NOT end normally. (Force mini-server down)

Campaign reset may be needed. Again, it is possible, due to several reasons that the dialer and the mini-server can no longer effectively communicate. When this happens, campaigns could be "stuck" in their current status (starting – ending - dialing) and you may need to reset that campaign. Additionally, you may find that after resetting the campaign, it still will not go to Started. At this point check the Campaign Manager and see if that campaign is still green. If it is, end the campaign through the Campaign Manager by clicking on the STOP button above. Now try to start the campaign from I-Tel.

We also produce some logs for diagnostic purposes. Quantrax will be the ones using that option. (Analysis of I-Tel logs)

SOFTDIAL CONTROL CENTER

OPTIONS

- Compliance with National regulations needs to be set to the Locale = USA
- Enable Reporting – Not used.
- Force Campaign Shut Down on Close – When the campaign has no more accounts to call, do you want the campaign to shut down? You should have:
  - Close after xx seconds - How do you want the calls to be handled if a collector is on an Outbound Call and the campaign ends? We recommend giving them at least 300 seconds to finish their call. (5 minutes)
  - Warn agents – check, if needed
- Station Nail Up Timeout – How long do you want to give the agent to pick up their extension when logging on before the dialer rejects their attempt at logging in. 60 Seconds is default.
- Blanket Recording- This will record all calls (inbound and outbound).
- Record from launch – Do you want to record once the call is triggered (this for example includes ringing on all calls)? Caution: this uses a lot of resources such as call recording licenses and disk space, only to be used when Quantrax instructing to use.

SERVICE STATUS

Softdial Services – Starting and stopping the Softdial services

This screen will show you the services that are running. If the service is running it will be indicated with a green light and when stopped, red. It is not unusual to see a service or two stopped. It is dependent on the feature(s) you have implemented. For example, if you are not utilizing call recording, this service may be listed, but is stopped and shows a red status. There are times that you may need to stop the services and recycle the system. This is the screen you need to go to in order to stop and start services. As discussed, the mini-server runs on the RMEx, IF one of the more critical services (Namespace or CallGem) stops, this will impact the communications link between the dialer and the RMEx. The mini-server may stop. Whenever you stop these services, you MUST go to the RMEx and re-start the mini-server.

Below are the steps for stopping services and recycling the system.

Recycling Services: If you have been asked to 'recycle services', that means you will need to:
1) STOP the Mini-server
2) STOP the Softdial services (2 or more servers - STOP the STG(s) server first. Then, STOP the CM server)
3) START the Softdial services (2 or more servers - START the STG(s) server first, then START the CM server)
4) START the Mini-Server

NAME SPACE EDITOR

This is used for additional dialer setups. Just a few are:
   a. **Creating Inbound Call Routes**
   b. **Creating Sound Resources**
   c. **Creating Queues**
   d. **Creating agent IDs** (for applications such as Campaign Status, Campaign Manager, etc)

CONCLUSION

The I-Tel dialer is an integrated dialer for the RMEx platform. While it is not restricted to this platform, the greatest functionality can be achieved by utilizing both products. The I-Tel dialer continues to be a very powerful product and is constantly evolving at a fast rate; affording many opportunities for its client base, so they can surpass the efforts of our staunchest competitors.

Queue Consolidations and *Contact Series for Dialer* are tremendously powerful tools allowing records to be moved to a campaign through the nightly process or 'on demand' if records are needed at a moments' notice! There are many more features available with the I-Tel dialer: Call Blending, which allows outbound and inbound calls through a single extension; Blended Transfer, which allows the transfer of calls between agents in a Call Blended environment; Linked Campaigns, which allows the startup of a 'Master' campaign to trigger the startup of 'Linked' campaigns, affording managers more time to focus on their other duties and not languish in day to day operating tasks.

Please take time to review the audio video training files for the I-Tel dialer that is available through the Quantrax website. Some of the feature setup can be difficult and the training videos are very helpful.