



I-Tel

Setting up Blended Transfers



PRESENTATION AND SET-UP



Setting up Blended transfers in I-Tel.....



- Blended transfers must be set up if you are using Call Blending and you *need to 'transfer' calls*
- Transferred calls appear on the receiving agents *outbound* extension
- If the receiving agent is unavailable an additional feature is available to allow the transferred call to roll to the receiving agents *inbound* extension

Setting up Blended transfers in I-Tel.....



Blended Functionality –

- Any user who logs into the dialer will need to be set up as “blended transfer”
- Functionality allows transfers between agents and NNE’s
- If a blended agent is logged into predictive and *is* in wait – they are eligible for a screen pop and the call when transfer occurs
- If a blended agent is logged into predictive and is **NOT** in wait – they will **NOT** get the screen pop and the call unless their second extension is utilized, where agent would have to retrieve the account and the call
- Transfers are immediate – there is no conferencing, *unless* you are transferring to a NNE



IMPORTANT NOTE –

- **For 2 box set-ups, you only need to update the Dialer/Campaign Manager server**
 - A second extension or a phantom extension needs to be set up through the PBX and needs to be able to ring the agent's station in order to take advantage of the roll over feature. (A *dummy* extension is not set up through the PBX so it cannot be set up for the overflow feature)
 - Please remove unused agent entries in the 'agent names' section of the name space editor before modifying the blended agent entries

Lets get started...



- ★ Go to `_tenantConfig/default/Campaigns/INBOUND`
- Create the Blended TRANSFER queue through the **INBOUND** Campaign by clicking on add data item
 - The queue must start with 20XXXX. The system was designed to look for a queue starting with 20. the remainder of the number needs to be the 4 digit or 3 digit outbound extension

Name Space Editor

- Name Spaces
 - _config
 - _tenantConfig
 - default
 - Agent Names
 - Agent Outcomes
 - Campaign Names
 - Campaigns
 - Administrator
 - Queues
 - INBOUND
 - Queues
 - IVROB1
 - IVROB2
 - MB 826
 - Queues
 - MEM HOSP
 - Power
 - Preview
 - system
 - Queues

Type	ID	Name	Details
Q	200101	200101	Overflow time 60. Overflow A
Q	200105	200105	Overflow time 60. Overflow A
Q	500001	500001	Overflow time 60. Overflow A
Q	500999	500999	Overflow time 45. Overflow A

Please continue...



- Insert the new queue
- The queue address will be the same
- Add a description
- Timers section – leave defaults
- Application routing – leave defaults
- Behaviour/Overflow address – if you take advantage of the inbound extension for the agent, their inbound (2nd extension) can be incorporated into the set-up

Queue Configuration ✕

<p>Identity</p> <p>ID <input style="width: 80%;" type="text" value="200101"/></p> <p>Queue Address <input style="width: 80%;" type="text" value="200101"/></p> <p>Description <input style="width: 80%;" type="text" value="Michelle's Blended Transfer"/></p> <p>Timers</p> <p><small>NOTE: All timer values are in seconds</small></p> <p>Agent RNA time (sec) <input style="width: 50%;" type="text" value="15"/></p> <p>Overflow time <input style="width: 50%;" type="text" value="60"/></p> <p>Queue time warning threshold <input style="width: 50%;" type="text" value="20"/></p> <p>Queue time error threshold <input style="width: 50%;" type="text" value="40"/></p> <p>Timed reminder interval <input style="width: 50%;" type="text" value="0"/></p> <p>Application Routing</p> <p>Allow application to determine route <input type="checkbox"/></p> <p>App Route timeout (sec) <input style="width: 50%;" type="text" value="5"/></p>	<p>Behaviour</p> <p>Overflow address <input style="width: 80%;" type="text" value="800301"/></p> <p>Out-Of-Service overflow address <input style="width: 80%;" type="text"/></p> <p>Overflow on group busy immediately <input type="checkbox"/></p> <p>Selection mode <input style="width: 80%;" type="text" value="Ordered"/></p> <p>Allow Immediate blend or transfer for outbound agents <input checked="" type="checkbox"/></p> <p>Queue priority relative to other queues in campaign <input style="width: 50%;" type="text" value="0"/></p> <p>SLA Time To Answer (sec) <input style="width: 50%;" type="text" value="15"/></p> <p>SLA Percentage Answer <input style="width: 50%;" type="text" value="80"/></p> <p>In-Queue Messaging</p> <p>Queue entry (mandatory) <input style="width: 80%;" type="text"/></p> <p>Queue busy on entry greeting <input style="width: 80%;" type="text"/></p> <p>Queue Hold Music Loop <input style="width: 80%;" type="text"/></p> <p>Queue timed reminder greeting <input style="width: 80%;" type="text"/></p> <p style="text-align: center;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p>
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Continue...



- The agent will be on their first extension (their outbound extension). To add the second extension (typically their inbound extension) create a queue for a single user – creating 800301 where 800xxx represents the 800000 queue naming convention and 301 is the inbound extension for the user
- Leave the selection mode to ‘ordered’
- For the field ‘Allow immediate blend or transfer for outbound agents’, please check this box

Queue Configuration

Identity	
ID	200101
Queue Address	200101
Description	Michelle's Blended Transfer
Timers	
NOTE: All timer values are in seconds	
Agent RNA time (sec)	15
Overflow time	60
Queue time warning threshold	20
Queue time error threshold	40
Timed reminder interval	0
Application Routing	
Allow application to determine route	<input type="checkbox"/>
App Route timeout (sec)	5
Behaviour	
Overflow address	800301
Out-Of-Service overflow address	
Overflow on group busy immediately	<input type="checkbox"/>
Selection mode	Ordered
Allow Immediate blend or transfer for outbound agents	<input checked="" type="checkbox"/>
Queue priority relative to other queues in campaign	0
SLA Time To Answer (sec)	15
SLA Percentage Answer	80
In-Queue Messaging	
Queue entry (mandatory)	
Queue busy on entry greeting	
Queue Hold Music Loop	
Queue timed reminder greeting	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Continue...



- Leave the default values for the remaining fields

Queue Configuration ✕

<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> Identity ID <input style="width: 80%;" type="text" value="200101"/> Queue Address <input style="width: 80%;" type="text" value="200101"/> Description <input style="width: 80%;" type="text" value="Michelle's Blended Transfer"/> </div> <div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> Timers <small>NOTE: All timer values are in seconds</small> Agent RNA time (sec) <input style="width: 80%;" type="text" value="15"/> Overflow time <input style="width: 80%;" type="text" value="60"/> Queue time warning threshold <input style="width: 80%;" type="text" value="20"/> Queue time error threshold <input style="width: 80%;" type="text" value="40"/> Timed reminder interval <input style="width: 80%;" type="text" value="0"/> </div> <div style="border: 1px solid gray; padding: 5px;"> Application Routing Allow application to determine route <input type="checkbox"/> App Route timeout (sec) <input style="width: 80%;" type="text" value="5"/> </div>	<div style="border: 1px solid gray; padding: 5px; margin-bottom: 5px;"> Behaviour Overflow address <input style="width: 80%;" type="text" value="800301"/> Out-Of-Service overflow address <input style="width: 80%;" type="text"/> Overflow on group busy immediately <input type="checkbox"/> Selection mode <input style="width: 80%;" type="text" value="Ordered"/> Allow Immediate blend or transfer for outbound agents <input checked="" type="checkbox"/> Queue priority relative to other queues in campaign <input style="width: 80%;" type="text" value="0"/> SLA Time To Answer (sec) <input style="width: 80%;" type="text" value="15"/> SLA Percentage Answer <input style="width: 80%;" type="text" value="80"/> </div> <div style="border: 1px solid gray; padding: 5px;"> In-Queue Messaging Queue entry (mandatory) <input style="width: 80%;" type="text"/> Queue busy on entry greeting <input style="width: 80%;" type="text"/> Queue Hold Music Loop <input style="width: 80%;" type="text"/> Queue timed reminder greeting <input style="width: 80%;" type="text"/> </div> <div style="text-align: right; margin-top: 10px;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </div>
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Continue...



Note - A predictive blended agent can receive inbound calls if they are logged into a predictive campaign *and* they are in 'wait' mode. So, an inbound call could not be delivered to this agent if they were already on a call or in 'wrap'. They could also not receive a transferred call. However, they could receive the transfer call if the second extension is set up giving the agent an opportunity to grab the call on their second line.

Continue...

- To create this queue, go to the 'system' queues (as shown) under `_tenantConfig/default/system/queues`
- click on 'add data item'
- enter the new queue `800xxx`

The screenshot shows the 'Name Space Editor' window. On the left is a tree view of the namespace hierarchy. On the right is a table of 'Queue Configurations'.

Type	ID	Name	Details
Q Queue Configura...	200	200	Overflow time 30. Overflow A
Q Queue Configura...	1001	1001	Overflow time 60. Overflow A
Q Queue Configura...	600005	600005	Overflow time 60. Overflow A
Q Queue Configura...	600777	600777	Overflow time 60. Overflow A
Q Queue Configura...	600998	600998	Overflow time 60. Overflow A
Q Queue Configura...	600999	600999	Overflow time 60. Overflow A
Q Queue Configura...	666666	666666	Overflow time 60. Overflow A
Q Queue Configura...	700999	700999	Overflow time 60. Overflow A
Q Queue Configura...	800301	800301	Overflow time 60. Overflow A
Q Queue Configura...	800305	800305	Overflow time 60. Overflow A
Q Queue Configura...	800306	800306	Overflow time 60. Overflow A
Q Queue Configura...	900999	900999	Overflow time 60. Overflow A
Q Queue Configura...	909501	909501	Overflow time 60. Overflow A
Q Queue Configura...	909502	909502	Overflow time 60. Overflow A
Q Queue Configura...	909503	909503	Overflow time 60. Overflow A
Q Queue Configura...	909504	909504	Overflow time 60. Overflow A
Q Queue Configura...	909505	909505	Overflow time 60. Overflow A

Continue...



- The ID is the queue
- The queue address is the same
- Choose a description that best describes the queue
- For Timers – leave all defaults *except* for agent RNA time – if you need the call to roll over to the agents voice mail, make sure the RNA time is set beyond the time needed to roll into voice mail
- Leave all remaining defaults

Queue Configuration
✕

<p>Identity</p> <p>ID: <input type="text" value="800301"/></p> <p>Queue Address: <input type="text" value="800301"/></p> <p>Description: <input type="text" value="Ext 101s IB Overflow"/></p> <p>Timers</p> <p><small>NOTE: All timer values are in seconds</small></p> <p>Agent RNA time (sec): <input type="text" value="15"/></p> <p>Overflow time: <input type="text" value="60"/></p> <p>Queue time warning threshold: <input type="text" value="20"/></p> <p>Queue time error threshold: <input type="text" value="40"/></p> <p>Timed reminder interval: <input type="text" value="0"/></p> <p>Application Routing</p> <p>Allow application to determine route: <input type="checkbox"/></p> <p>App Route timeout (sec): <input type="text" value="5"/></p>	<p>Behaviour</p> <p>Overflow address: <input type="text"/></p> <p>Out-Of-Service overflow address: <input type="text"/></p> <p>Overflow on group busy immediately: <input type="checkbox"/></p> <p>Round-Robin group: <input type="checkbox"/></p> <p>Allow Immediate blend or transfer for outbound agents: <input type="checkbox"/></p> <p>Queue priority relative to other queues in campaign: <input type="text" value="0"/></p> <p>SLA Time To Answer (sec): <input type="text" value="15"/></p> <p>SLA Percentage Answer: <input type="text" value="80"/></p> <p>In-Queue Messaging</p> <p>Queue entry (mandatory): <input type="text"/></p> <p>Queue busy on entry greeting: <input type="text"/></p> <p>Queue Hold Music Loop: <input type="text"/></p> <p>Queue timed reminder greeting: <input type="text"/></p>
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Continue...



- The agent entries need set up now –
- Go to the Agent names section under `_tenantConfig/default/Agent Names`
- First – modify the outbound entry already entered
- Find the user entry and open

Name Space Editor

Name Spaces

- _config
 - Huntgroup
 - Incoming Call Route
 - Landlord Users
 - Sound Resources
 - Static Configuration
 - Tenants
 - Turret Configurations
- _tenantConfig
 - default
 - **Agent Names**
 - Agent Outcomes
 - Campaign Names
 - Administrators
 - Queues
 - INBOUND
 - Queues
 - INNBOUND
 - Queues

Type	ID	Name	Details
User Configuration	0	Reception	Permissions: Agent
User Configuration	1	IVROB01 9001	Permissions: Agent
User Configuration	2	IVROB02 9002	Permissions: Agent
User Configuration	3	IVROB03 9003	Permissions: Agent
User Configuration	4	IVROB04 9004	Permissions: Agent
User Configuration	5	IVROB05 9005	Permissions: Agent
User Configuration	555555	Dialer Control	Permissions: Agent, Super
User Configuration	555556	MED-NNE 000...	Permissions: Agent
User Configuration	555557	RECEPTION 00...	Permissions: Agent
User Configuration	555558	IVRIB05 009505	Permissions: Agent
User Configuration	555559	IVRIB04 009504	Permissions: Agent
User Configuration	555560	IVRIB03 009503	Permissions: Agent
User Configuration	555561	IVRIB02 009502	Permissions: Agent
User Configuration	555562	IVRIB01 009501	Permissions: Agent
User Configuration	555563	PAT 000105	Permissions: Agent
User Configuration	555564	PAT 000305	Permissions: Agent
User Configuration	555565	MICHELLE 000...	Permissions: Agent
User Configuration	555566	MICHELLE 000...	Permissions: Agent
User Configuration	555574	1	Permissions: Agent
User Configuration	555575	NELSON 000...	Permissions: Agent
User Configuration	555576	NELSON 000...	Permissions: Agent
User Configuration	555577	*VM-700002000...	Permissions: Agent

Buttons: Add Path, Delete Node, Add Data Item, Delete Item, Edit, Close



Continue...



- Re-verify that the Agent identifier field is correct
- If this is the correct entry, then move down to the Station properties section and check the field 'Auto-Accept transfers initiated by agent'
- Add the new 'blended transfer' queue created earlier in the 'queue' window on the right
- To enter the queue – just enter the number and then click ok

User Editor ✕

Identity

Resource ID

Agent Identifier

Password

Agent identifier authenticated by Operating System

Permissions

User Job Control

Supervisor Campaign Admin

Configuration

System

Super User

Station Properties

Station nailed up on logon

Auto-Accept transfers initiated by agent

Record all calls for this agent

Queues

Queue memberships entered here are processed for the agent on logon, and also on queue start. This is a convenient alternative to using the CallGem API

200101

Continue...



NOTE – Regarding Agent names. Voice mail extension entries are created automatically by the system and appear immediately when entered through valid extensions. However, OB and IB extensions, while they are created automatically, DO not appear in Agent names until the agent logs in and after you recycle the Softdial Control Center. So -- the outbound entry may not be set up. If it is not set-up you will need to have the agent log into the dialer using their correct extension. Then recycle the Softdial Control Center - *while services are running*. Re-check Agent names for the OB entry, then update the entry. (Make sure the extension you need is already set-up in I-Tel, Valid extensions)



Continue...



- Open the inbound entry
- If this is the correct entry, then move down to the Station properties section and check the field 'Auto-Accept transfers initiated by agent'
- click ok to update

User Editor
✕

Identity

Resource ID:

Agent Identifier:

Password:

Agent identifier authenticated by Operating System

Queues

i Queue memberships entered here are processed for the agent on logon, and also on queue start. This is a convenient alternative to using the CallGem API

Permissions

<input checked="" type="checkbox"/> User	<input type="checkbox"/> Job Control
<input type="checkbox"/> Supervisor	<input type="checkbox"/> Campaign Admin
<input type="checkbox"/> Configuration	
<input type="checkbox"/> System	
<input type="checkbox"/> Super User	

Station Properties

Station nailed up on logon	<input type="checkbox"/>
Auto-Accept transfers initiated by agent	<input checked="" type="checkbox"/>
Record all calls for this agent	<input type="checkbox"/>

Continue building the pieces by going to the iSeries...



- Go to the I-Tel menu in RME_x
- Select Management options
- Select hunt groups
- F 6 to create a new hunt group

RME_x
QUANTRAX CORPORATION INC.

- ENTER
- ATTN
- PAGEUP
- PAGEDN
- EXIT
- HELP
- CALENDAR
- EVENTS

Hunt Groups
10/01/2011 15:11:22

Position to
Starting value

Type options, press Enter.
 2=Change 3=Copy 4=Delete 5=Display 6=Print 8=Group members

Opt	Group Code	Group Name	Group Address	Dialer Code
<input type="checkbox"/>	500999	Standard Blended IB	500999	A
<input type="checkbox"/>	509999	test	509999	A I
<input type="checkbox"/>	600005	TX to IVR HG	600005	A I
<input type="checkbox"/>	600777	Test TX to IVR HG	600777	A I
<input type="checkbox"/>	600999	IB IVR test	600999	A I
<input type="checkbox"/>	603000	IB IVR for Medical	603000	A
<input type="checkbox"/>	614000	Regular HG Transfer	614000	A
<input type="checkbox"/>	700005	Preview IB	700005	A
<input type="checkbox"/>	70001	IVR hunt group	70001	A
<input type="checkbox"/>	70002	Transfer hunt group	70002	A
<input type="checkbox"/>	700999	Standard NB Hunt Group	700999	A

Bottom

F3=Exit
F5=Refresh
F6=Create
F12=Cancel

F14=Previous view
F15=Next view
F17=Top
F18=Bottom
F21=Print list

Continue...



- The new transfer group code is 200101 where 101 is the outbound extension for Michelle
- The group address is the same code
- Most importantly, the inbound campaign name is INBOUND, all in caps
- fill in company code & dialer code
- Hunt group type – enter a T for transfer

A screenshot of the RMEx 'Create Hunt Groups' interface. The interface has a light blue header with the RMEx logo and 'QUANTRAX CORPORATION INC.' on the left, and a keyboard graphic on the right. Below the header is a navigation menu with buttons for ENTER, ATTN, PAGEUP, PAGEDN, EXIT, HELP, CALENDAR, and EVENTS. The main content area is titled 'Create Hunt Groups' and shows the date '10/01/2011 15:14:23' and system ID 'S10E9B6C'. The text 'Type choices, press Enter.' is displayed. A list of fields is shown with corresponding input boxes: 'Group code' (200101), 'Group name' (Michelle), 'Group address' (200101), 'Inbound campaign name (blank = system)' (INBOUND), 'Voicemail extension' (empty), 'Company number' (99), 'Dialer code' (A), and 'Hunt group type (S=Static)' (T). Two red arrows point to the 'Group code' and 'Inbound campaign name' fields. At the bottom, there are buttons for F3=Exit, F5=Refresh, and F12=Cancel.

Continue...



- **Do not add any members** to the new blended transfer hunt group
- If there are several transfer hunt groups to add, don't forget to use the copy feature
- **Recycle services when you have completed** entering the transfer hunt groups

Now put your set-up into *action*....



Once services have been recycled, try transferring a call!

- ❖ The agent will need to do a **T tab enter** from a smart code field – the agent needs to be logged in to the dialer
- ❖ Enter the *outbound extension* of the agent you need to transfer the call to
- ❖ if the predictive blended receiving agent is available – the call will come through their outbound extension
- ❖ if the agent was NOT available and you took advantage of the inbound overflow extension, the call would then go to the agents inbound extension

You have requested a transfer

Enter extension#

Blind transfer (Y)

Omit data transfer (Y)

F7 to Cancel



Thank you for your time!

The Quantrax team

