I-TEL DIALER

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 Queue Configura...	200101	200101	Overflow time 60. Overflow A...
Q Queue Configura...	200105	200105	Overflow time 60. Overflow A...
Q Queue Configura...	500001	500001	Overflow time 60. Overflow A...
Q Queue Configura...	500999	500999	Overflow time 45. Overflow A...

Add Path ▸ | Delete Node | Add Data Item | Delete Item | Edit | Close

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

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   ☐
App Route timeout (sec)   5

Behaviour
Overflow address   800301
Out-Of-Service overflow address
Overflow on group busy immediately   ☐
Selection mode   Ordered
Allow Immediate blend or transfer for outbound agents   ☑
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

OK   Cancel

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: ☐
App Route timeout (sec): 5

Behaviour
Overflow address: 800301
Out-Of-Service overflow address:
Overflow on group busy immediately: ☐
Selection mode: Ordered
Allow Immediate blend or transfer for outbound agents: ☑
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:

OK   Cancel

Continue...

- Leave the default values for the remaining fields

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

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

Identity
ID: 800301
Queue Address: 800301
Description: Ext 101s IB Overflow

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: ☐
App Route timeout (sec): 5

Behaviour
Overflow address:
Out-Of-Service overflow address:
Overflow on group busy immediately: ☐
Round-Robin group: ☐
Allow Immediate blend or transfer for outbound agents: ☐
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:

OK   Cancel

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

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 — 555565

Agent Identifier — MICHELLE 000101

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

OK   Cancel

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 transfer s initiated by agent'
• click ok to update

User Editor

Identity

Resource ID: 555566

Agent Identifier: MICHELLE 000301

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

[OK]   [Cancel]

Continue building the pieces by going to the iSeries…

- Go to the I-Tel menu in RMEx
- Select Management options
- Select hunt groups

- F 6 to create a new hunt group

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

RMEx   **QUANTRAX CORPORATION INC.**

ENTER
ATTN
PAGEUP
PAGEDN
EXIT
HELP
CALENDAR
EVENTS

Create Hunt Groups   10/01/2011 15:14:23
System: S10E9B6C

Type choices, press Enter.

```
Group code  . . . . . . . . . . . . . . .        200101

Group name  . . . . . . . . . . . . . .          Michelle
Group address  . . . . . . . . . . . .           200101
Inbound campaign name (blank = system). . .      INBOUND
Voicemail extension  . . . . . . . . . .
Company number  . . . . . . . . . . . .          99
Dialer code  . . . . . . . . . . . . .           A
Hunt group type (S=Static). . . . . . . .        T
```

F3=Exit   F5=Refresh   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#      105
   Blind transfer (Y)    [  ]
   Omit data transfer (Y) [  ]


        F7 to Cancel
```

Thank you for your time!

The Quantrax team