Blended Transfers Set-Up

Blended Transfer is available in I-Tel Version10.2 and later releases.

Agents in a predictive outbound campaign now have the ability to TRANSFER calls to another Blended agent's Outbound Extension. This feature is wonderful for extending the functionality of a Blended agent.

In order to **receive** a Blended Transfer call, **Predictive** Blended agents need a NEW Blended **200**XXX series queue. The 200XXX queue must be set-up in the Name Space Editor under Campaign INBOUND and in RMEx. In addition, their Outbound Extension entry needs to be updated with their new Blended Queue. Then in Agent Names in the Name Space Editor, the 'outbound' entry for each predictive blended agent will need to be modified to include their new 200XXX queue. Now the predictive blended agent can have calls transferred along with the account to their outbound extension. However, if the predictive blended agent is already on a call, on their outbound extension, they will not get the transfer. The transfer will not go through and the sender will retain the call.

There is an additional feature in Blended Transfer that allows the Predictive Blended agent's second extension (IB extension) to be utilized. If the Predictive Blended agent is unavailable on their OB extension, the transferred call will ROLL to the agents IB extension giving the agent another opportunity to catch the call.

At times, you may see PB agent. This means Predictive Blended agent.

Agents in a Blended Campaign can be set up in one of three different ways:

- 1. The standard blended environment will be one (1) extension with inbound and outbound calls AND NO transfer capability.
- 2. The next level of blended will be one (1) extension with inbound and outbound calls that will accept transferred calls only in wait mode.
- 3. The last level of blended will be two (2) extensions with inbound and outbound calls to the outbound extension, transferred calls to the outbound extension, and, if the blended agent is not in wait mode, the transferred call will roll to the blended agents inbound extension.

Predictive note -

Remember -- Predictive (non-blended) uses 2 (two) extensions and Outbound calls are launched from the agents outbound extension while inbound calls are received through the Inbound extension. Transfers should not be done.

IMPORTANT NOTES

- 1. For environments with multiple servers, you only need to update the Dialer/CM server
- 2. Blended transfers work ONLY in a Predictive environment
- 3. A second extension or a phantom extension must be set up on the agents station in order to take advantage of the roll over feature
- 4. Please remove unused agent entries in the 'agent names' section of the name space editor before modifying the blended agent entries

Setting Up Blended Transfers

- 1. Start up the NameSpace editor
- 2. Go to _tenantConfig/default/Campaigns/INBOUND
- 3. Create the Blended TRANSFER queue through the INBOUND Campaign



- 4. Select 'Add Data Item'
- The queue MUST start with 200XXX, where XXX is the agent's Outbound extension. FYI - We have programmed to look for queues beginning with 200XXX.

vueue Configuration	×
Identity ID 200101 Queue Address 200101 Description 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	Behaviour Overflow address 800301 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 SLA Time To Answer (sec) SLA Percentage Answer 80 In-Queue Messaging Queue entry (mandatory) Queue busy on entry greeting
Application Routing Allow application to determine route	Queue Hold Music Loop Queue timed reminder greeting OK Cancel

- 6. ID Insert the new queue
- 7. Queue Address insert the new queue
- 8. Description choose a helpful name. We chose 'Michelle's Blended Transfer' for her outbound extension
- 9. Timers section leave all defaults
- 10. Application routing section leave all defaults
- 11. Overflow Address If a second extension is needed, the agent's inbound extension would be added here. So, we have added the queue 800301 where 301 is the agents inbound extension. This queue MUST NOT start with 200XXX. (see below for more information)
- 12. Allow immediate blend or transfer for outbound agents please check this box
- 13. Leave SLA defaults as is

Predictive Blended (PB) agents second extension (OPTIONAL) -

With the basic Blended Transfer set-up, a predictive blended agent can receive calls transferred to their OB extension ONLY and ONLY if in wait. If the PB agent is already on a call, thru their OB extension, the transferring agent will retain the call – the call will not get transferred.

If the PB agent is on their OB extension, a transferred call **COULD** roll to the PB agents IB extension. To do this, a standard queue 800XXX would need to be set-up in **System** Queues. Then, this queue would be added as an 'Overflow address' in the new Blended Queue 200XXX. So, the transferring agent will still transfer the call to the predictive blended agents OB extension. If the agent is unavailable, the transferred call will ROLL to the agents IB extension giving the agent another opportunity to catch the call.

In our example, we created the standard system queue 800301, where 301 is the inbound extension for the PB agent.

🖁 Name Space Editor					×
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tenantConfig	-11	Q Queue Configura	200	200	Overflow time 30. Overflow A
		Q Queue Configura	1001	1001	Overflow time 60. Overflow A
Agent Names		Q Queue Configura	600005	600005	Overflow time 60. Overflow A
Agent Names		Q Queue Configura	600777	600777	Overflow time 60. Overflow A
Agent Outcomes		Q Queue Configura	600998	600998	Overflow time 60. Overflow A
Campaign Names		Q Queue Configura	600999	600999	Overflow time 60. Overflow A
🗎 🕒 🕒 Campaigns		Q Queue Configura	666666	666666	Overflow time 60. Overflow A
📄 🕒 🗢 Administrator 🛛 🗕		Q Queue Configura	700999	700999	Overflow time 60. Overflow A
Queues		Q Queue Configura	800301	800301	Overflow time 60. Overflow A
		Q Queue Configura	800305	800305	Overflow time 60. Overflow A
Oueues		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
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Add Path Delete Node		Add Da	ita <u>I</u> tem	Delete Item	<u>E</u> dit <u>C</u> lose

- 14. Now, if needed, create the STANDARD Queue '800301' for the rollover, through 'System Queues'.
- 15. Select 'Add Data Item'

aueue Configuration	
Identity 800301	Overflow address
Queue Address 800301 Description Ext 101s IB Overflow	Out-Of-Service overflow address
Timers NOTE: All timer values are in seconds Agent RNA time (sec)	Round-Robin group Image: Comparison of the comparison
Overflow time 60 Queue time warning threshold 20	SLA Time To Answer (sec) 15 SLA Percentage Answer 80
Queue time error threshold 40 Timed reminder interval 0	Queue entry (mandatory) Queue busy on entry greeting
Application Routing	Queue Hold Music Loop
App Route timeout (sec) 5	OK Cancel

- 16. ID the 800XXX, in this case 800301, where 301 is the agents IB extension
- 17. Queue Address same as ID...800301
- 18. Description choose a more helpful name…like 'Blended Agent X IB Overflow queue' or use what is shown
- 19. Timers section leave all defaults **except** the RNA setting if you need the call to roll over to the agents VM. If so, make sure this setting is higher than the number of rings needed to roll to voice mail.
- 20. Application routing section leave all defaults
- 21. Overflow Address leave blank for now
- 22. Round-robin is not needed it is only 1 agent
- 23. Allow immediate blend or transfer for outbound agents please **DO NOT** check this box
- 24. Leave SLA defaults as is

 	Name Spaces	▲ Type	ID	Name	Details
 Huntgroup Incoming Call Route Landlord Users Sound Resources Static Configuration Tenants Turret Configurations LenantConfig Agent Names Campaign Names Campaign S Queues MBOUND User Configuration User Configuration	😑 config	User Configuration	0	Reception	Permissions: Agent
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- 25. Now, go to _tenantConfig/default/Agent Names
- 26. You will need to modify the OB extension entry for the PB agent. If the OB entry is set-up, please make sure the CORRECT entry is modified. NOTE agent ID and EXT must be EXACTLY the same.
- 27. Select the OB entry for the blended agent on the right side and Click 'Edit'

iser Editor	×
Identity	1
Resource ID 555565 Queue memberships entered here are processed for the agent on logon, and also on queue start. This is a centre with alternative to using the	
Agent Identifier MICHELLE 000101 Call	
Password 200101	
Agent identifier authenticated by Operating System	
Permissions	
User Job Control	
Supervisor Campaign Admin	
System	
Super User	
Station Properties	
Station nailed up on logon	
Auto-Accept transfers initiated by agent 🔽	
Record all calls for this agent OK Cancel	

- 28. RE-verify that the field 'Agent identifier' is the correct agent and extension
- 29. **ADD** the blended TRANSFER queue 200101 to the **OB** profile under Queues (the queue window)
- 30. NOW CHECK 'auto-accept transfers initiated by agent' in Station Properties
- 31. Click 'OK'
- 32. **NOTE** Voice mail extension entries are created automatically by the system and appear immediately. However, OB and IB extensions, while they are created automatically, DO not appear in Agent names until the agent logs in. So the outbound entry may not be set up. If it is not set-up you will need to create the OB entry now.
- 33. First make sure the extensions you need are already set-up in I-Tel
- 34. Go to the I-Tel menu on the iSeries



35. Select option 16 – I-Tel System Control Options

MENU: ITLOPT I-Tel System Control Menu	Date : 6/23/09 Time : 15:27:26
 Valid extensions NNE's Disposition codes Playback messages Phone number maintenance options Local area codes Copy disposition codes by company DNIS text Dialer configuration System controls IVR control selection 	
Ready for option	
F7-Exit	

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36. Now select option 1 - Valid extensions

	Val	<u>id Extensio</u>	ns	_	6/23/2009	15:28:32
Position to		_ Starting	value		System.	31023800
Type options, press 2=Change 3=Copy	Enter. J 4=Delete	5=Displa	y 6=Print			
Outbound	Remote	Inbound	Voicemail	Primary	y Dialer	
Opt Extension	Extension	Extension	Extension	User	Code	
101		301			A	
_ 102		302			A	
_ 103					A	
_ 104	304				A	
_ 105		305			A	
_ 106		306			A	
_ 107		307			A	
_ 111		113			A	
_ 114		314			A	
_ 131		431			A	
_ 132		332			A	
						More
F3=Exit F5=Refres	h F6=Crea	te F12=Ca	ncel			
F14=Previous view	F15=Next v	iew F17=T	op F18=Bo	ttom F	21=Print	list
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37. Check the list to verify the extensions you need already exist

38. If they do not, press F6 to create a new valid extension

<u>Create Valid Extensions</u>	6/23/2009 15:30:18 System: S10E9B6C
Type choices, press Enter.	
Outbound extension	
Turn on call recording? (Y,N, or " ")YRemote extension315Inbound extension315Logon control-Voicemail extension-Primary user-Dialer code-	
F3=Exit F5=Refresh F12=Cancel	

- 39. Fill in the correct information:
- 40. Outbound extension the Outbound extension
- 41. Turn on Call recording if you are already recording ALL, just put a Y. Adding an 'N' will not allow recording for this extension even if you have recording turned on.
- 42. Remote extension leave blank for now
- 43. Inbound extension the Inbound extension
- 44. Logon control leave blank for now
- 45. Voicemail extension leave blank for now
- 46. Primary user leave blank for now
- 47. Dialer Code A, unless you have multiple dialers
- 48. Now recycle services
- 49. Now go back to the Agent Names in the Name space editor and follow the prior steps

50. If it is not listed, create the entry in _tenantConfig/default/Agent Names

ser Editor	X
Identity	
Resource ID 555566 Queue m for the ag This is a	emberships entered here are processed ent on logon, and also on queue start. convenient alternative to using the
Agent Identifier MICHELLE 000301 CallGem	API
Password	<u> </u>
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	DK Cancel

- 51. Now, if the OPTIONAL IB feature has been set up, you will need to modify the IB entry in Agent Names as well. Therefore, you need to check 'auto-accept transfers initiated by agent' in Station Properties.
- 52. Please create this entry if it is not listed in _tenantConfig/default/Agent Names
- 53. Click 'OK'

Display Hunt Groups	1/14/2009	17:30:50
	System:	S10E9B6C
Press Enter to continue.		
Group code		
Group name Michelle		
Group address 200101		
Inbound campaign name (blank = system) : INBOUND		
Voicemail extension		
Company number		
Dialer code		
Hunt group type (S=Static) T		

- 54. On I-Tel/as400 side, the new Blended Queue 200101 needs to be created
- 55. Make sure The Inbound Campaign name = INBOUND (all caps)
- 56. Make sure the company number is added
- 57. Make sure the dialer code is entered (it is usually A unless you have multiple dialers)
- 58. Make sure the 'HUNT GROUP TYPE' = 'T'. This MUST be added in order to be able to 'transfer' the call to the blended transfer agent.
- 59. Lastly DO NOT add any members to this queue
- 60. Note if you have several hunt groups to add, don't forget to use the copy feature. After creating the first hunt group, place a 3 in front of the new blended transfer hunt group and enter. Then add the information for the next agent and enter.

Now, to actually TRANSFER a call to a Predictive Blended agent -

You have requested a transfer
Enter extension# <u>105</u> Blind transfer (Y)
Omit data transfer (Y)
F7 to Cancel

- 61. The transferring agent does a 'T TAB ENTER' from the account details screen of the account they are transferring
- 62. Input the OUTBOUND extension of the Predictive Blended agent you are 'transferring' the call to...and press ENTER.
- 63. The call automatically goes as a 'blind' transfer.
- 64. The PB agent, if in wait, gets the account and the call, if there is a match
- 65. The PB agent, if in wrap, sees the call appear on their IB extension (if they have been set up for this), picks up the call and hits the escape key to retrieve the account.
- 66. Remember Transfer is made to the PB outbound extension---always.

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