

## Call Blending for I-Tel

Call Blending is now available in a Predictive environment.

This wonderful feature allows for an agent to launch Outbound calls and receive Inbound calls through a **single** extension.

More specifically, an agent will log into a predictive campaign using their outbound extension. The campaign will be delivering calls to the agent. While the agent is in wait mode, an inbound call can be routed to the agent – **through their outbound extension**.

### **Blended Functionality –**

- ♣ Multiple call blending paths can be set up (therefore, multiple DNIS's will be needed)
- ♣ Call Blending allows inbound calls to be routed directly to a waiting predictive blended agent, reducing their wait time
- ♣ If you set up Call Blending you **MUST** set up Blended Transfers to 'transfer calls' between agents
- ♣ If you have two extensions available, both extensions could be utilized for inbound and transferred calls
- ♣ If a blended agent is **NOT** logged into Predictive, the agent can still receive inbound calls, **BUT** they will not receive the call and the account together as they would in Predictive Blended mode

### Items needed—

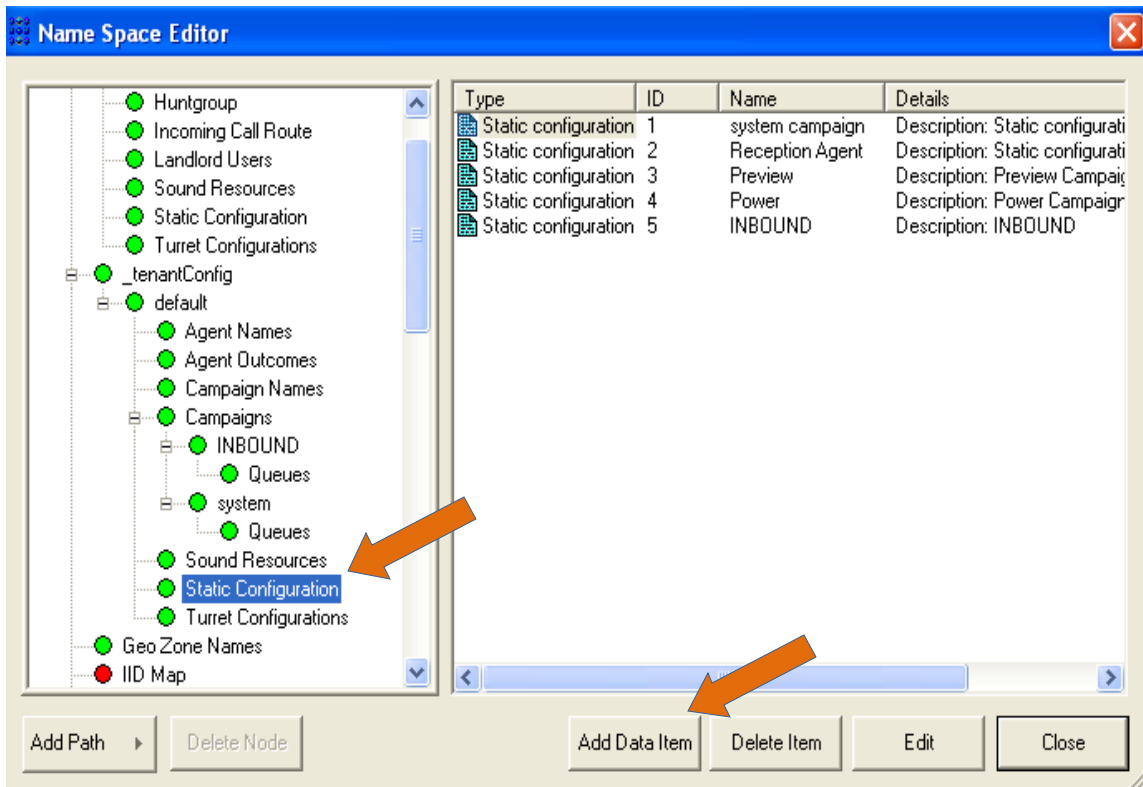
- Incoming call route (an existing or new DNIS)
- Campaign INBOUND
- New Blended Queue/HuntGroup
- A system queue
- List of your Blended agents and their extensions

## IMPORTANT NOTE –

- ✓ This feature is mainly for environments that run predictive campaigns through-out the day. For blending to work, the agents **MUST** be logged into a predictive campaign.
- ✓ A new phone number could be used for the blended inbound route. In this event, a new DNIS will be needed. If you use a DNIS already in production, the current call flow for that DNIS will be changed.
- ✓ Please remember, while this feature uses a single extension, agents may be working in a preview or power mode occasionally and may need a second extension.
- ✓ The ‘INBOUND’ Call Blending Campaign **must** be set up in order to activate Call Blending.
- ✓ Blended Transfers must also be set up if you incorporate Call Blending. Please see the documentation on our website.
- ✓ In order to add members to the new blended hunt group, you will add them using their inbound extension. If you do not have inbound extensions for your agents, a **dummy** extension needs to be added for each agent to the valid extension list.

## Setting Up Call Blending—

1. If you have a multiple box set-up for the dialer, the new campaign “INBOUND” needs to be set up on the Dialer/CM Server (Campaign Manager server).
2. Go to Name Space Editor
3. Go to `_tenantConfig/default`



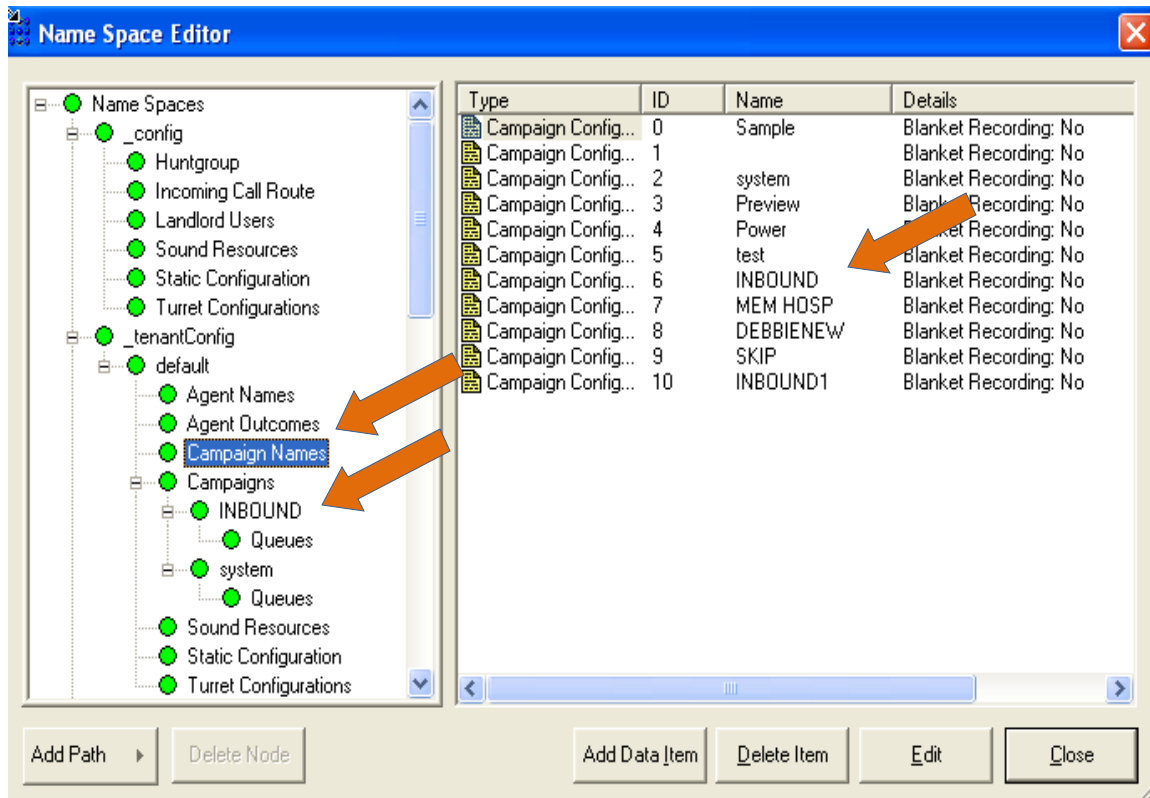
4. Move down and Select **Static Configuration** - highlighted
5. Click on Add Data Item and the following screen will be presented --



6. ID – system automatically updates for the next sequence number
7. Address – type in INBOUND (MUST be in upper case)
8. Description – type in INBOUND (all upper case)
9. Softdial Commands – **the command MUST be OC\CNINBOUND\DM5**
10. Softdial Commands – to make sure **call recording** is initiated for the blended INBOUND campaign, **the command MUST be OC\CNINBOUND\DM5\CR**
11. Click OK
12. **Recycle services – so, end and start services...**
13. **NOW – EXIT out of Softdial Control Center with services running...**

**To do this -- right click on the Softdial Control Center icon (lower right) and select the last option 'Exit Softdial Control Center'**

**Now - Restart Softdial Control Center...go to programs, Softdial control center...**



14. NOW - VERIFY that the new Campaign INBOUND has been added under Campaigns

15. If INBOUND is not added under Campaigns you can try adding it manually.

To add manually -

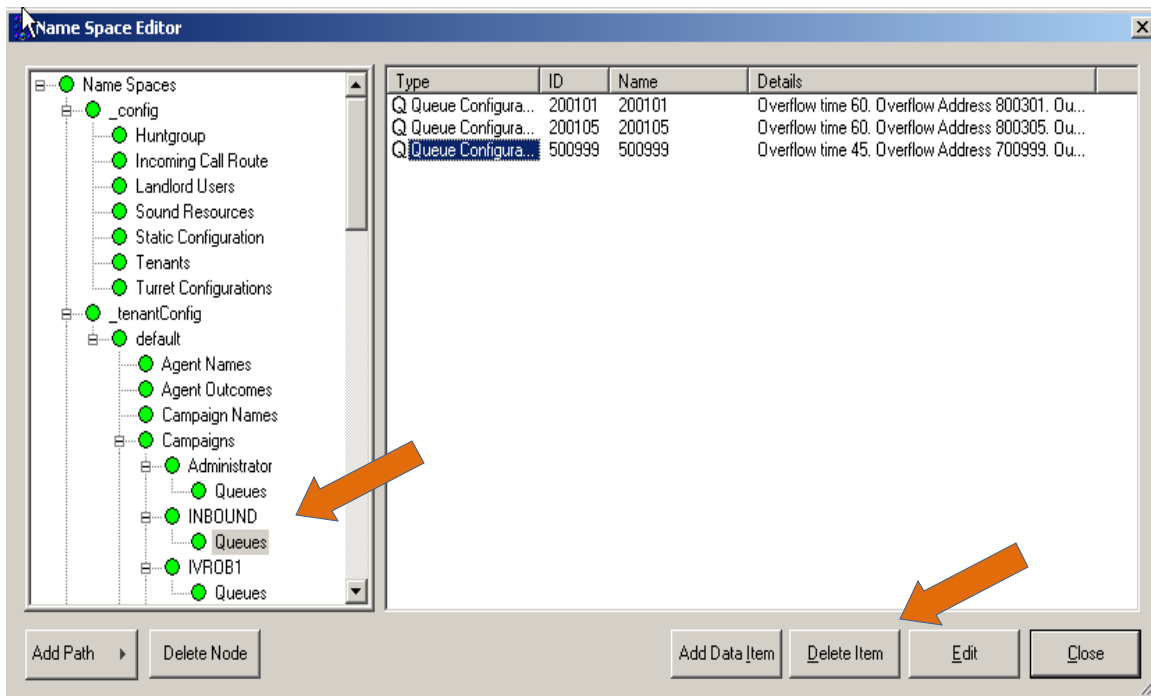
You will need to add INBOUND and Queues--

**Campaigns → Add path → Campaign Configuration data → Type INBOUND and then click enter**

**Click on INBOUND (under Campaigns) → Add path → Hunt group → Type Queues and click enter**

16. Second - Verify that 'Inbound' has been added to Campaign Names (highlighted)

(As you can see INBOUND has been added to both locations. This will only take effect **after** Recycling Services AND exiting out and back into Softdial Control Center)



17. Now, we need to create the new blended inbound queue. Move down to the new campaign INBOUND and click on Queues just below INBOUND

18. Click on Add Data Item

19. NOTE – we have added 500999 for our example. We have asked folks to use **50XXXX** where, XXXX is the DNIS assigned to the inbound number. Queues starting with **50XXXX** help to identify a blended inbound path. If you do not wish to use the DNIS, you can use **500999** like we did for our example.

20. You will be presented with the following screen –

21. IDENTITY/ID – ID is automatically populated with the next sequence number available, but we changed to reflect the new queue
22. IDENTITY/Queue Address – **this is the new queue which should be the same as the Destination Address from the Incoming Call route screen.**
23. IDENTITY/Description – a small text description...’Blended IB Hunt Group’
24. TIMERS/Agent RNA Time – time spent ringing a station
25. TIMERS/Overflow Time – time before rolling to the Overflow queue
26. TIMERS/Queue Time Warning Threshold – leave default
27. TIMERS/Queue Time Error Threshold – leave default
28. APPLICATION ROUTING/Allow Application to determine route – **DO NOT** Mark this box. Please leave **BLANK**. This is for operations that do not rely on the dialer (STG) to route calls.
29. APPLICATION ROUTING/App Route Timeout – leave default
30. BEHAVIOUR/Overflow Address – this is the queue for the secondary hunt group needed **in case no one is logged into Predictive or all agents are busy**. The call will need to be routed to a STANDARD (non-blended) or system queue. This is so agents can receive the inbound

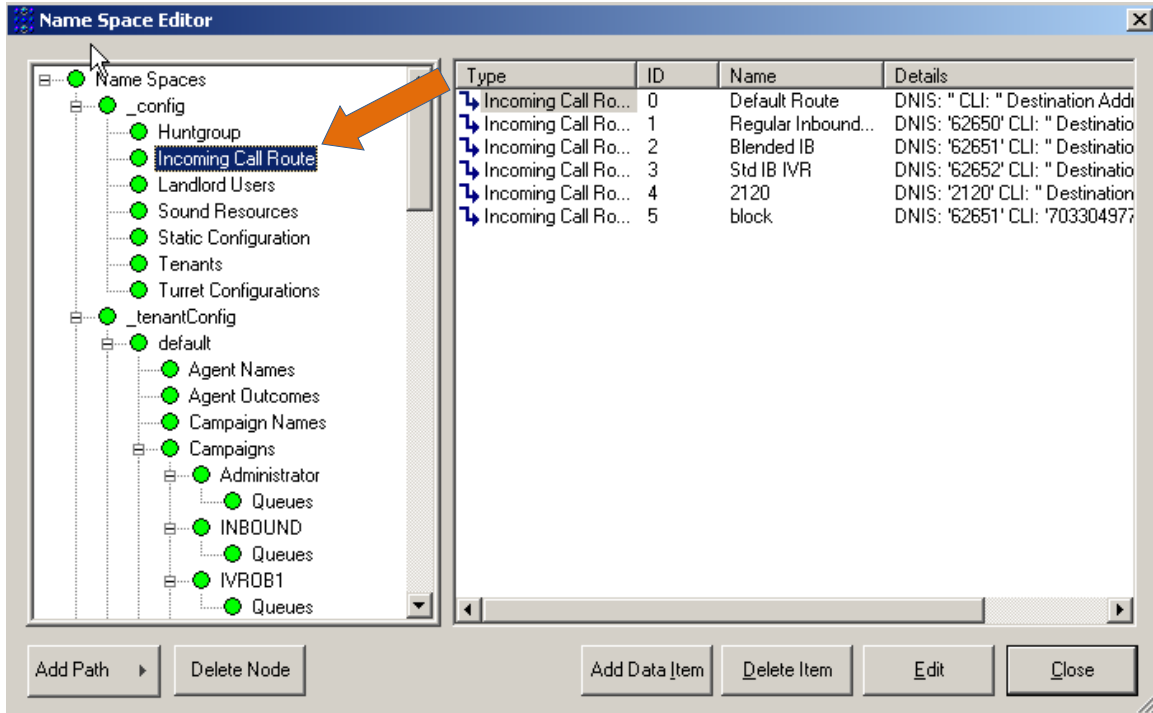
calls while in a different dialer mode since no one is logged in to predictive. These calls would come through the agent's inbound extension. (for our example we used 700999)

31. BEHAVIOUR/Overflow on group busy immediately – Generally, if this is checked, the Overflow time is ignored and the call is routed immediately if all agents are busy. BUT for Blended - **Do not use - agents in predictive will be considered busy and the call will immediately overflow.**
32. BEHAVIOUR/Round-robin – if this is checked, the next “round-robin” agent is given the call instead of the next agent available in the queue. **Need to check this box**, since the system may find the agents at the beginning of the sequence always busy – since they are at the top of the sequence – and the call will overflow immediately to the overflow queue.
33. BEHAVIOUR/Allow immediate blend or transfer for outbound agents – if this is checked, it will force the outbound blended agent back to an inbound status PLACING more importance on inbounds. Giving more priority to inbound could result in an increase of outbound abandoned calls. **Do Not check this** for the Call Blended queue.
34. In-Queue Messaging/Queue Entry – this is only mandatory, if you do not want the caller to hear ‘dead air’ until connected to an agent. A greeting wav needs to be set up and entered here as shown. Do not enter the file extension. This wav will play at the start of each inbound call. The wav will play to completion before routing the call so please do not record the wav too long. NOTE – Name space editor/sound resources needs updated once you have stored the wav file. Additionally, if you have a 2-box dialer set-up, you will need to store the wav file on the STG server and update the Name space editor/sound resources on the Campaign Manager server.
35. In-Queue Messaging/Queue busy on entry greeting – this is NOT mandatory. This wav will play if all agents are busy when the call initially comes through. Wav will NOT stop when an agent becomes available.
36. In-Queue Messaging/Queue hold music loop - This wav will play if no agents are available and there is time left before the overflow queue is triggered. Wav will loop until an agent answers or the overflow time is met.
37. In-Queue Messaging/Queue time reminder greeting –This field is generally not used. It 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.
38. FYI-IF not outlined please use the default provided.
39. **Now**, the **CALL ROUTE** needs to be set up.



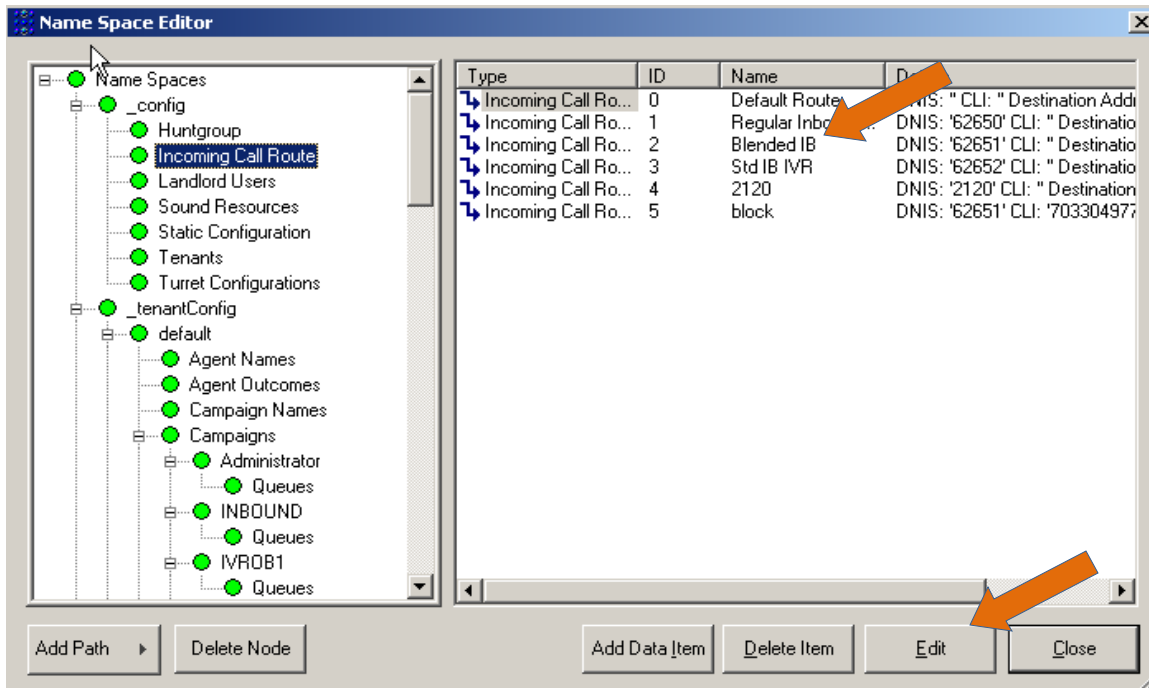
40. NOTE - If a new number is going to be used for blended inbound, a new call flow route will need to be set up. You will need the DNIS for the new number. So, if using a new number, please go to the step “Setting up a NEW route” below.

41. Go to Name Spaces/ \_config

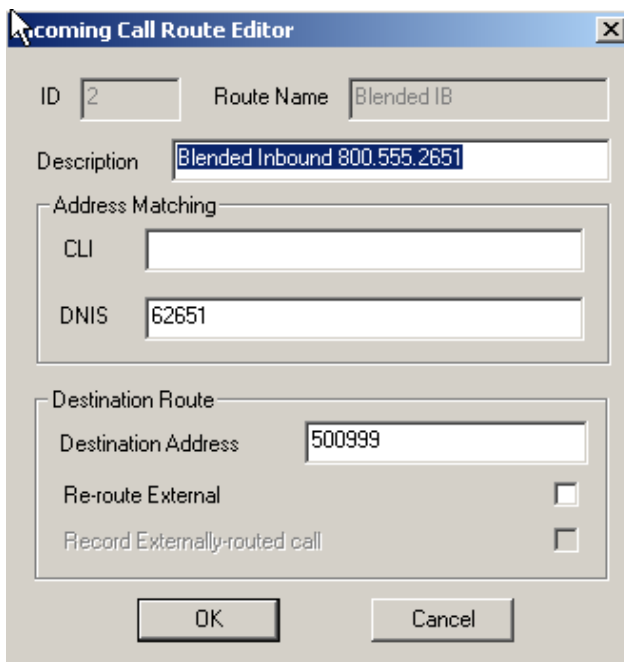


42. Move down and click on Incoming Call Route

43. Go to the right side of the window and click on the Incoming Call Route DNIS that will be changed AND assigned to Call Blending.



44. Click on Edit and the next screen will be presented --

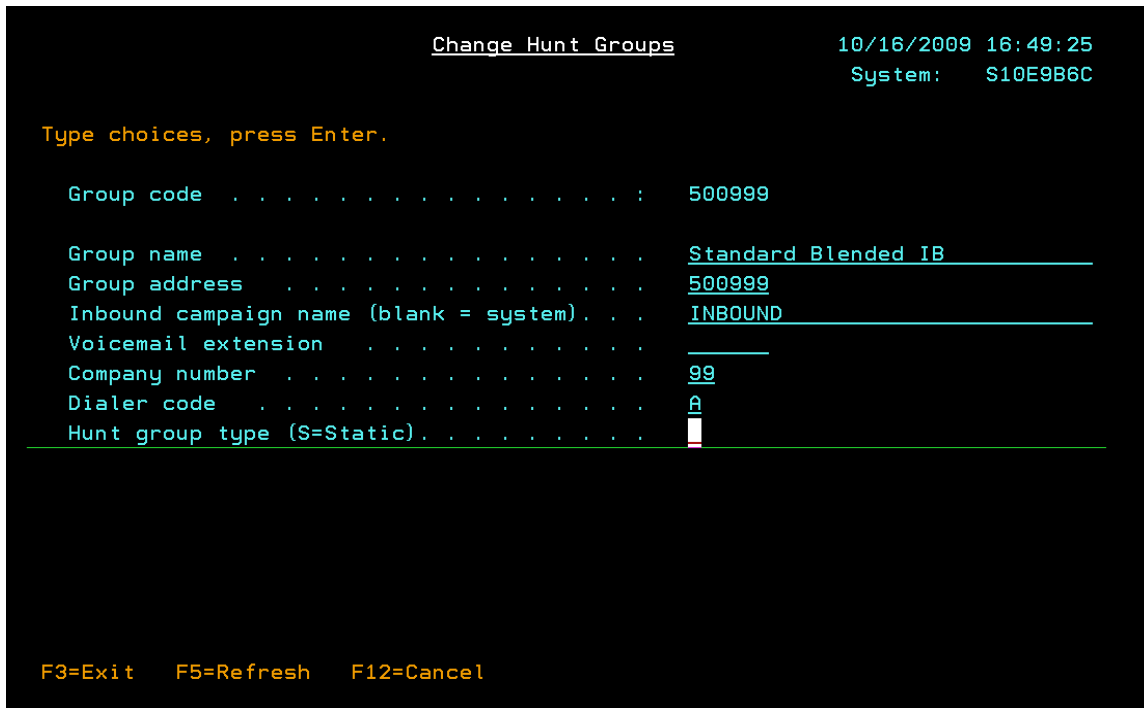


45. The destination address will be the new blended queue. The blended queue for this example is 500999.

46. Setting up a NEW route -- If the Incoming Call route is not already set up:

- a. Click on **Add Data Item**
- b. ID – is the next sequence number
- c. Route Name – Blended IB
- d. Description – Blended Route XXX-XXX- XXXX, where XXX-XXX- XXXX is the new number.
- e. CLI – leave blank for now
- f. DNIS – the carrier code assigned to the incoming number
- g. Destination address – a Queue (Hunt Group). Queues should start with **500000** for Call Blending. So, please add your new queue 50xxxx or use any queue that starts with 50. (the example is 500999)

47. Now go to **RMEEx/I-Tel** and set up two hunt groups – Blended Inbound 500999 and Standard system 700999



48. **Blended Inbound 500999** -- Set this queue (hunt group) up the same as you would a system hunt group. **However**, there is 1 difference. Make sure you add **INBOUND (ALL CAPS)** to the “Inbound campaign name” field as shown. ALL other fields are set up as a standard hunt

group. Make sure the company number is also filled in if needed. Remember to field exit through each field.

49. 700999 needs to be set up as a **standard** system hunt group. So, DO NOT add INBOUND to the campaign name field.

```
Hunt Group Members                                     9/15/2010 17:56:41
                                                         System: S10E9B6C

Position to . . . . . _____ Starting value

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

Group code : 500999      - Standard Blended IB

Opt Sequence  User      Extension  Group
-            10      0000000305
-            20      0000000301
-            30      0000000306
-            40      0000000302

                                                         Bottom

F3=Exit  F5=Refresh  F6=Create  F12=Cancel
F17=Top  F18=Bottom   F21=Print list
```

50. Now ADD the members you have designated as blended agents to this hunt group.
51. ADD each member using their inbound extension. If you do not have a second extension (or inbound extension) you will need to update valid extensions for each agent. (see next)

```

Valid Extensions
9/15/2010 17:59:51
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                303          A
-      105                305          A
-      106                306          A
-      107                307          A
-      111                113          A
-      114                314          A
-      115                315          A
-      131                431          A
-      132                332          A

More...

F3=Exit  F5=Refresh  F6=Create  F12=Cancel
F14=Previous view  F15=Next view  F17=Top  F18=Bottom  F21=Print list

```

52. **If you do not have an inbound extension to enter**, just enter a **dummy** extension, e.g., the outbound extension is 101, just add 301 as a dummy extension in the inbound field for 101. This extension does not have to be able to ring the station for the agent. (NOTE: if outbound extensions are 3 digits in length, you will need to be consistent with the dummy extensions, making them 3 digits in length)
53. Now go back to the blended inbound hunt group and add all the members using the new dummy extension for each.
54. You will need to **recycle the mini server** once you have made this change.
55. If you have made other changes on the dialer server, you should recycle ALL now.

## Running Call Blending—

1. Sign in to a Predictive campaign
2. With Call Blending –

a. You can receive an inbound call while you are **in wait mode** and logged in to one of these campaigns.

1) Here you are in **wait mode** –

```
Account Processing (PREDICTIVE/PROGRESSIVE)
Campaign name :      MEM HOSP
Type of processing  P
QCat
Time frame (A,M,P)  A
User ID             DEBBIE

Wait mode for ACCOUNT PROCESSING with predictive/progressive dialing
```

2) While you are in wait mode, AN INBOUND CALL comes in.

3) The account screen will pop automatically if there is a match, otherwise, the inquiry screen will pop up.

```

Category      *ANI-TFR*      Account Inquiry

Company name  YOU OWE-IT COLLECT SERVICES, INC.(1) 8.1

----- SEARCH DATA -----
1 - Case number      a) Case#          b)
2 - Name             Last name         First name
3 - Client account  Account#          Account# (contd)
4 - Social security Soc.sec# (or last 4)
5 - Street address  Street address    Address (contd)
6 - Home phone number Home ph# (xxxxxxx)
7 - Place of employment POE
8 - Phone numbers   Phone# (xxxxxxx)
9 - Primary balance Primary balance
10 - Case number with company Company and case#
11 - Guarantor name Last name          First name

Most recently accessed accounts
Company code      99          99-070160012  BILLS CONSTR
Search type       6          99-063320937  KERR
Search data       a) 3019682101 b) _____ 99-063320925  GOE
                                                99-063320345  COLEMAN
                                                99-000000900  CODE

F9-Purge F12-Multiple Accts          F24-Num.Cl.Acct#

```

- 4) Now you can do a standard search
- 5) Once you locate and work the account, the account is stamped 'I-Tel inbound 9991234567' (see next screen)

```

Category      INBOUND 000 A Coll NB NB 96 Case number 061590099 - 99
Guarantor     CHEETUM HOWEE 0 Home phone 321 515 1212
Extra address _____ R Work phone _____
Street address 1 MAIN ST Cell phone _____
City/State/Zip BETHESDA MD 20817 DC BI _____
Client 000005 NYC COLLECTIONS _____
Cl.Acct#/L.Trn _____ 8/08/05 _____
Amount placed 1001.00 on 8/22/06 _____
Balance 499.00-
Close code 1 PAID IN FULL 10/10/06
Other Info.
Total balance 499.00- from 1 PIF 1
Last payment 1500.00 on 7/17/06 Last Letter 10/10/06 Type Z1
POE _____ Smart Code _____
X-Reference
Notes _____ Payments
15:58 07/22/07 I-Tel inbound 3019682101 NEL * 07/17/06 Pd.Agcy 1000.00
10:27 07/25/07 I-Tel inbound 3016574782 NAF 07/17/06 Overpmt 499.00
12:53 07/25/07 99 INAPI:Account Accessed GUI 07/17/06 Pd.Agcy 1.00
12:53 07/25/07 99 BY:10 GUI Spouse
14:11 07/26/07 I-Tel inbound 3019682101 NEL LW 6/20/07 AC Status
DB 8/08/1901 SS 474-25-7914

```

- 6) Once the call is completed and the account has been updated, **F7 back** to the WAIT screen. (**please remember – if you have a transferred account, you NEED to F7 back** to the WAIT screen and wait for the next call -- this is very important because the system will not see this current call as **ended**)
- 7) NOTE regarding transfers - When you F7 back past the I-Tel Inbound Call List you will not see the inbound number that you just handled. It will be removed.
- 8) NOTE – agents logged into an outbound predictive campaign and logged into the INBOUND campaign will be assigned to either campaign based on **inbound** demand.