Outbound IVR Messaging for *I-Tel*

Basic elements for OB (Outbound) IVR Messaging:

- An OB IVR campaign needs to be set up.
- The Script config will designate how many Virtual agents will be used.
- The SCH config will actually LOG the Virtual agents into the campaign when the campaign is started.
- An IVR Script is mapped to the 'Dual Tones' which are the assigned telephone keypad numbers. (For example – PRESS 1 TO SPEAK TO AN AGENT). If an assigned number on the telephone keypad is depressed, the caller might hear a message, get routed directly to a hunt group or get routed to an assigned extension.
- If the call is to be transferred to a hunt group, the Softdial will look in the Script XML for the HG code. The code will also need to be set-up in the Name Space Editor.
- If the Hunt group is setup in the Name Space Editor correctly, it will then communicate with the iSeries for a Hunt group with that IDENTICAL name (Extension).
- On the iSeries, the Hunt group will have the extensions listed that are eligible to receive this call.

What is involved in setting up Outbound IVR?

a. Will more licenses be needed? - How many Outbound Campaigns do you expect to run? You will need 1 OB IVR agent for each simultaneous campaign, so you may need more licenses. In order to run a specific OB IVR campaign, you will have a SET number of Virtual agents designated for the OB IVR campaign. So, you need to take this into consideration for licensing. If you have 10 licenses and you reserve 2 for OB IVR, while the OB IVR campaign is running, ONLY 8 agents could log in. Please contact us if you need assistance…

b. A Standard script will be provided - The Standard Script has many features available. You Can:
   - Verify the Debtor
   - Retrieve the Mailing address
   - Retrieve a Balance
   - Jump out of the script to speak to an agent

c. Outbound Campaigns need to be set up – to launch the Outbound IVR you will need to set up an Outbound IVR campaign. This type of campaign requires a few minor changes in the set-up. Remember, you can have multiple OB IVR campaigns, just keep in mind licensing and call volumes.

d. OB IVR Agent needs to be set up – You will need an OB IVR agent for each campaign and they will need to be set up.

e. . wav files - – There will be a handful of wav files that will need to be uploaded to your dialer PC. These are the files that will play as the caller moves through the script. In this case (OB), there will be wav files for the connect(live call) and wav files for leaving a message on an answering machine.

f. Modify configurations – 3 specific configurations will need to be modified in the Softdial folder. This is needed so the IVR can call the correct script, play the correct wav files and route to the correct hunt groups, etc. They are:
   a. Script
   b. Sch
   c. Stg

g. Create Sound Resource names - - This is another name for the Wav Names. Wav files will be called during the script process, so these names need to be set up in the dialer PC.

h. Set up a hunt group for 'talk to agent' – When the Debtor needs to jump out of the OB script and talk to an agent, you need to decide where you want the debtor to go. Do you need the call to go to a Hunt Group, where several agents are available to take the call?

i. Set up all agents in the hunt group – When the debtor jumps out of the script and needs to talk to an agent, the IVR will need to route the call to an agent in the hunt group.

j. Verify reception extension is set up – When an agent is not available, the call can be routed to a default receptionist. So, a backup is set up just in case it is needed.

k. Verify TTS engine exists -– The TTS engine will be needed for Text To Speech capability.

l. Verify iSeries/dialer code – Quantrax will need to verify that all proper iSeries/Intelec and dialer code is updated.

m. Make sure the User ID IVRITEL is created with the **password QIVR124#**.

n. **Recycle Services after ALL changes are made**

A. Make sure the standard script is located in c:\softdial\SCR2\scripts\

- STD 1 (long version with Kickout) or

- STD 2 (small version with Kickout) or

- STD 3 (small version with NO Kickout) or

- STD 4 Combined script

B. Make sure the standard script config.xml is located in c:\softdial\SCR2\scripts\

C. Set-up the outbound campaign—

- On the iSeries (in Intelec)

- Then set up the campaign on the dialer PC

Creating an IVR Campaign-please read through this section first
(some parameters need to be setup differently for an IVR campaign)

Creating a campaign for an Outbound IVR is very similar to creating a standard 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:

a) Campaign name must begin with IVR
b) Campaign can ONLY be set up for Predictive or Progressive
c) Campaign must be set up for AMD + Connect (Through Campaign Manager, goto 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)

*Remember to review the dialer Handbook if you need assistance setting up campaigns….

1. Setting up an OB IVR agent – IVROB01, IVROB02 etc is typically used for OB IVR agents. Select your agent(s)… Now assign an extension to each one..
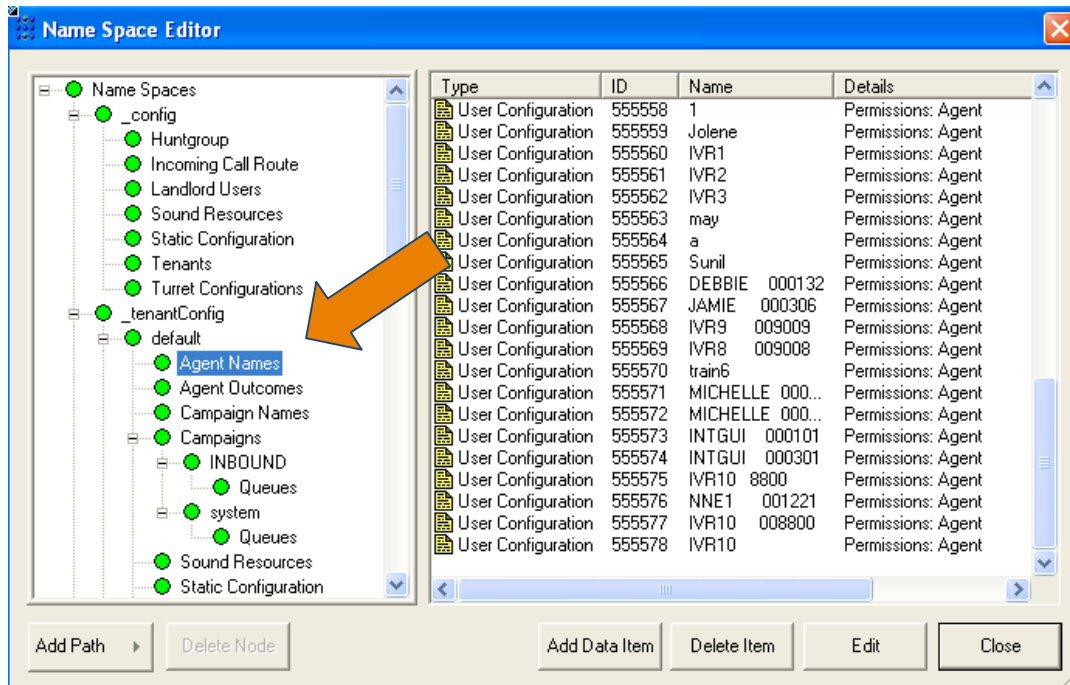
    a) IVROB01   9001
    b) IVROB02   9002
    c) IVROB03   9003
    d) IVROB04   9004
    e) IVROB05   9005

2. You now need to open the script config.xml –
Right click on the file and open with notepad. Then, insert the agent name IVROB01, etc in the outbound script line. You need a line for each agent.
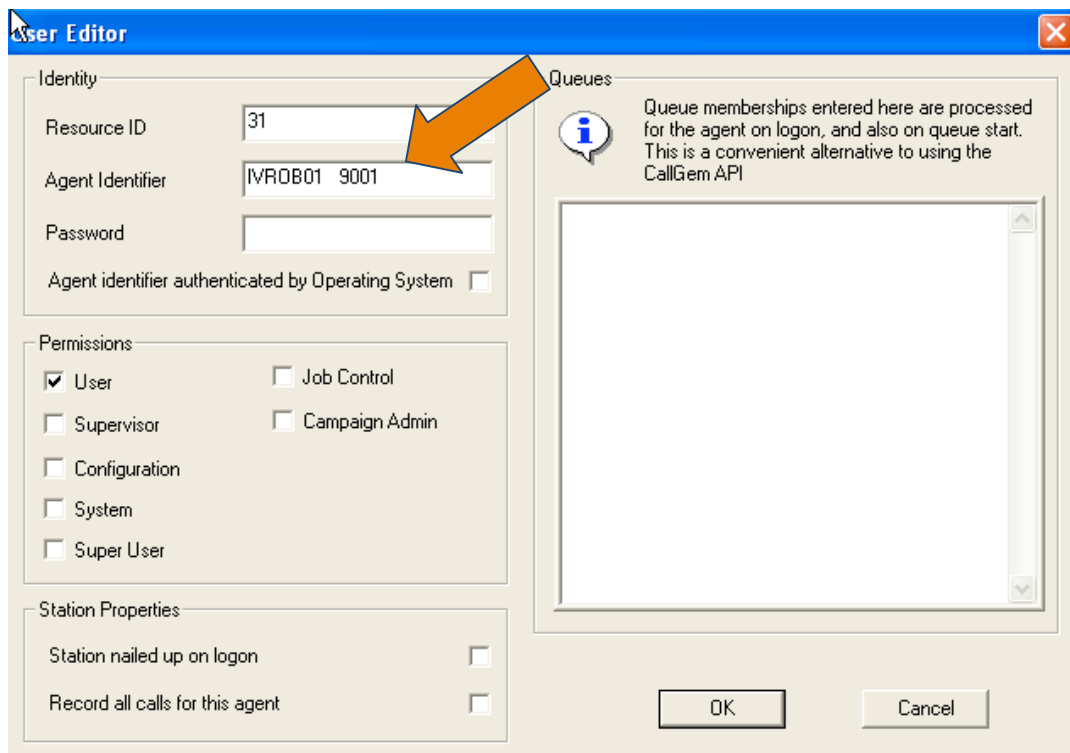
    PATH-C:\softdial\SCR2\scripts   FN=config.xml (open in notepad)

    <agent name="**IVROBO1**" extension="9001" tenant="default" campaign="system" script="IVrScript_XXXXOut001.xml" available="true" />

3. The agent(s) needs to be setup in the **name space editor** on the dialer PC. Right click on the round backwards arrow 🔄 in the lower right hand corner. Go up to Name Space Editor. Then go down to Agent Names. Roll down to the last entry and record the entry number. Then go back to Agent Names and highlight.

4. Then click on Add Data Item.

5. Enter the next number in the sequence for the entry number ID. Enter IVROB01 9001 and click OK.
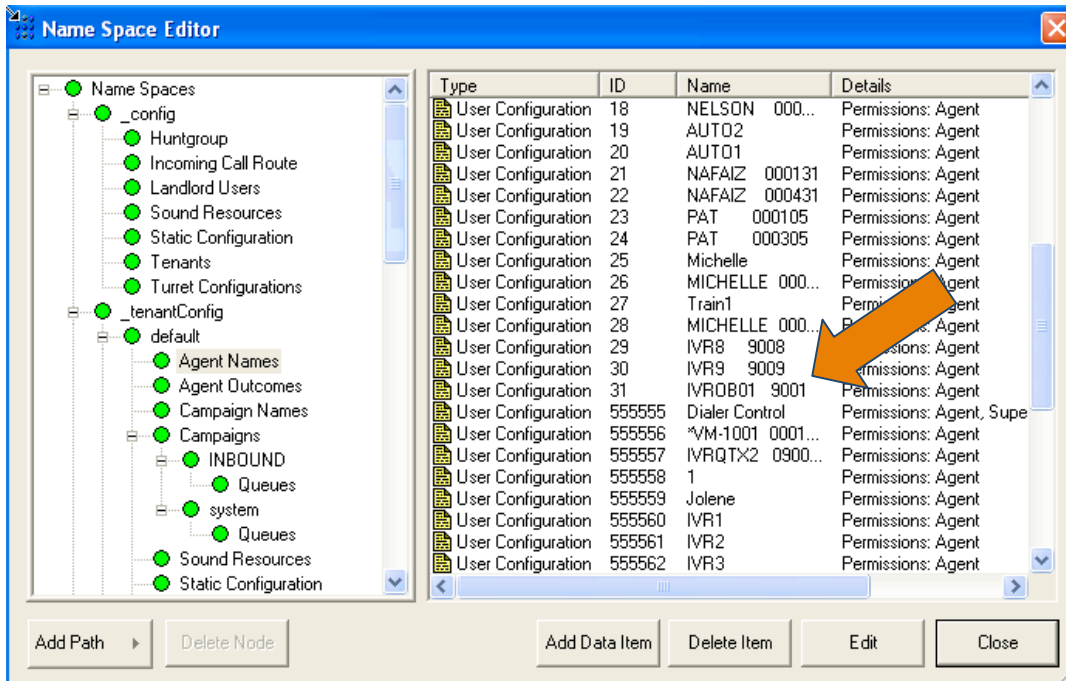
6. **FYI** – You will need a different OB IVR agent for each campaign. However, you may have multiple agents for each campaign.

```
Config.xml - Notepad
File  Edit  Format  View  Help

<?xml version="1.0" encoding="utf-8"?>
<configuration xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-inst
        <agentSchedules>
                <agentSchedule agentID="IVR10" campaignID="IVROB1" tenantID="">
                        <agentDescription>IVR10</agentDescription>
                        <agentExtension>8800</agentExtension>
                        <autoWrap>true</autoWrap>
                        <virtualAgent>true</virtualAgent>
                        <retryLogon>true</retryLogon>
                        <validTimes>
                                <timeRange days="MON;WED;THU;FRI" start="08:00" end="22:00" />
                                <timeRange days="TUE" start="08:00" end="22:30" />
                                <timeRange days="SAT" start="09:00" end="22:00" />
                        </validTimes>
                </agentSchedule>
                <agentSchedule agentID="AUTO1" campaignID="IVROB1" tenantID="">
                        <agentDescription>AUTO1</agentDescription>
                        <agentExtension>101</agentExtension>
                        <autoWrap>true</autoWrap>
                        <virtualAgent>true</virtualAgent>
                        <retryLogon>true</retryLogon>
                        <validTimes>
                                <timeRange days="MON;WED;THU;FRI" start="08:00" end="22:00" />
                                <timeRange days="TUE" start="09:00" end="19:30" />
                                <timeRange days="SAT" start="10:00" end="14:00" />
                        </validTimes>
                </agentSchedule>
                <agentSchedule agentID="AUTO3" campaignID="IVRCBCHMP911" tenantID="">
```

This is the actual entry for an agent in SCH config---

```
<agentSchedule agentID="IVROB01" campaignID="IVROB1" tenantID="">
        <agentDescription>IVROB01</agentDescription>
        <agentExtension>9001</agentExtension>
        <autoWrap>true</autoWrap>
        <virtualAgent>true</virtualAgent>
        <retryLogon>true</retryLogon>
        <validTimes>
                <timeRange days="MON;WED;THU;FRI" start="08:00" end="22:00" />
                <timeRange days="TUE" start="08:00" end="22:30" />
                <timeRange days="SAT" start="09:00" end="22:00" />
        </validTimes>
</agentSchedule>
```

7. The SCH config.xml needs to be modified for **each agent** needed for a campaign.

8. Wavs files are provided for the STANDARD scripts. They should be located in:
   c:\softdial\STG\sounds\ivr\outbound

9. 2 WAVS need to be provided by Quantrax with each install if you elect to use our standard wavs.

   - Combined Script – SecondMessageMachine and FifthMessageLive OR
   - Other – FifthMessageLive and PlayContinueMessageMachine

10. If you do not wish to use the wavs provided you may record your own wav files. Please see the instructions provided in the Dialer Handbook for recording these files.

11. FYI - The SCR2 config.xml needs to be modified for the **campaign names**, the **IVR agents** and the **extensions** for those agents….and now the SCRIPT name. Make sure you have added every item to each line…

    <agent name="**IVROB01**" extension="**9001**" tenant="**default**" campaign="**system**" script="**IVrScript_XXXXOut001.xml**" available="true" />

12. FYI – The SCH config.xml is for OUTBOUND ONLY.

13. FYI – the STG config.xml will be provided by Quantrax.

14. SET-UP a Hunt Group for a caller to be routed if the caller elects to jump out of the IVR message and talk to an agent. The standard hunt group for this should be **700999**.

15. Add this Hunt Group and its LIVE members to the I-Tel Options menu in intelec.

16. Now add the Hunt Group to the Hunt Group section in the Name Space Editor. (NOW – System/queues)

17. VERY IMPORTANT – need to ADD this Hunt Group to the SCRIPT Config.xml in 'GROUP ADDRESS'. **Please talk to Quantrax before changing if you have any questions at all.**

18. **You should have already created the OB IVR campaign on the iSeries – and logged the TQ#**

19. <u>You should have already created the same OB IVR campaign on the PC in Campaign manager</u>

20. <u>Make sure you have updated the SCR2 config and the SCH config</u>

21. Verify that the **default receptionist** is set-up in the Name Space Editor so in the event a call cannot be routed, the call will be passed to the receptionist.

22. Verify with Quantrax that the TTS engine loaded and is updated in the STG config. (you would see a separate folder in Softdial called TTS)

23. Make sure AMD is enabled in the STG config, otherwise the system will not be able to detect Answering Machines.

<enableAnswerMachineDetection>**true**</enableAnswerMachineDetection>

24. Verify with Quantrax that the iSeries code has been updated.

25. Recycle Services – take the mini-server down in intelec, then recycle services on the dialer PC. Once the Softdial services have been re-started, bring the mini-server back up.

26. Once you have completed all of the above…remember to start and stop campaigns using the Campaign Administrator in Intelec…