

# Blended Transfers Set-Up

Blended Transfer is available in I-Tel Version 10.2 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 **200XXX** series queue. The 200XXX queue must be set-up in the Name Space Editor under Campaign INBOUND and in RMEEx. 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 agent's 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 agent's inbound extension.**

## **Predictive note –**

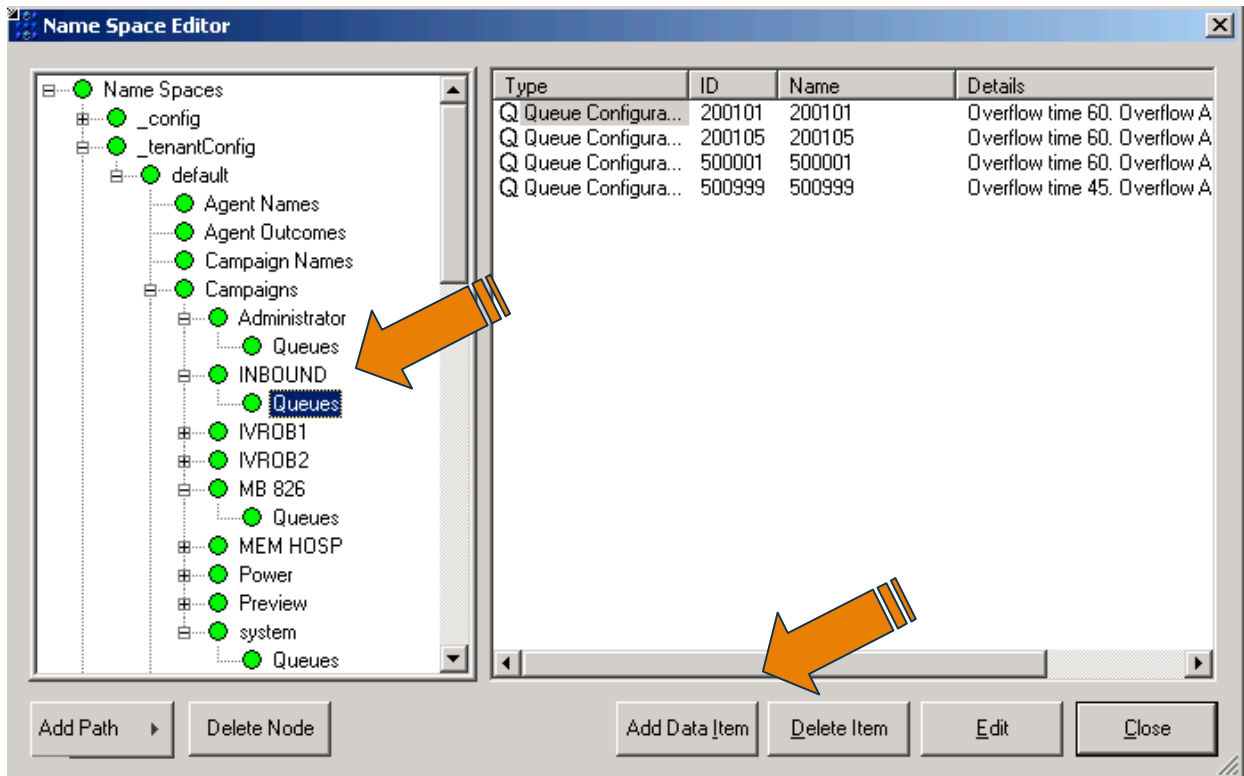
Remember -- Predictive (non-blended) uses 2 (two) extensions and Outbound calls are launched from the agents outbound extension while inbound calls are received through the Inbound extension. Transfers should not be done.

## **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'
5. 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.

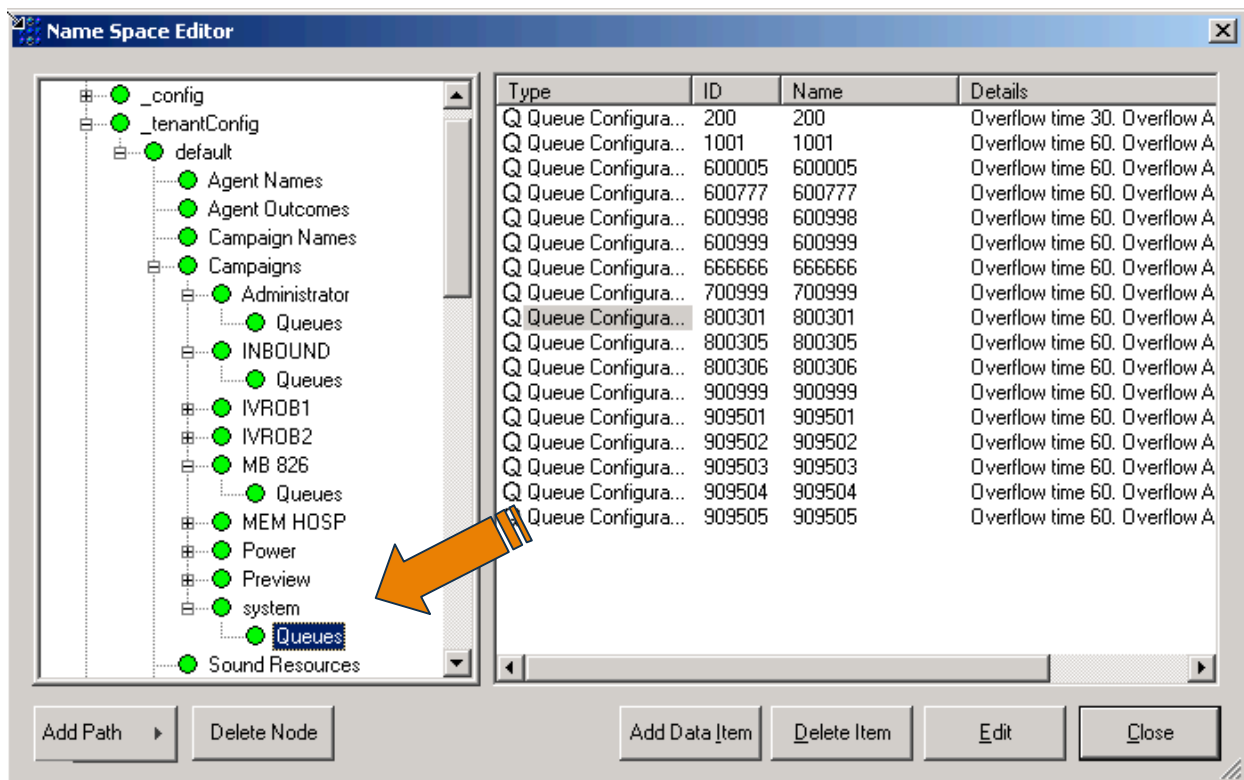
6. ID - Insert the new queue
7. Queue Address – insert the new queue
8. Description – choose a helpful name. We chose ‘Michelle’s Blended Transfer’ for her outbound extension
9. Timers section – leave all defaults
10. Application routing section – leave all defaults
11. **Overflow Address** – If a second 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.

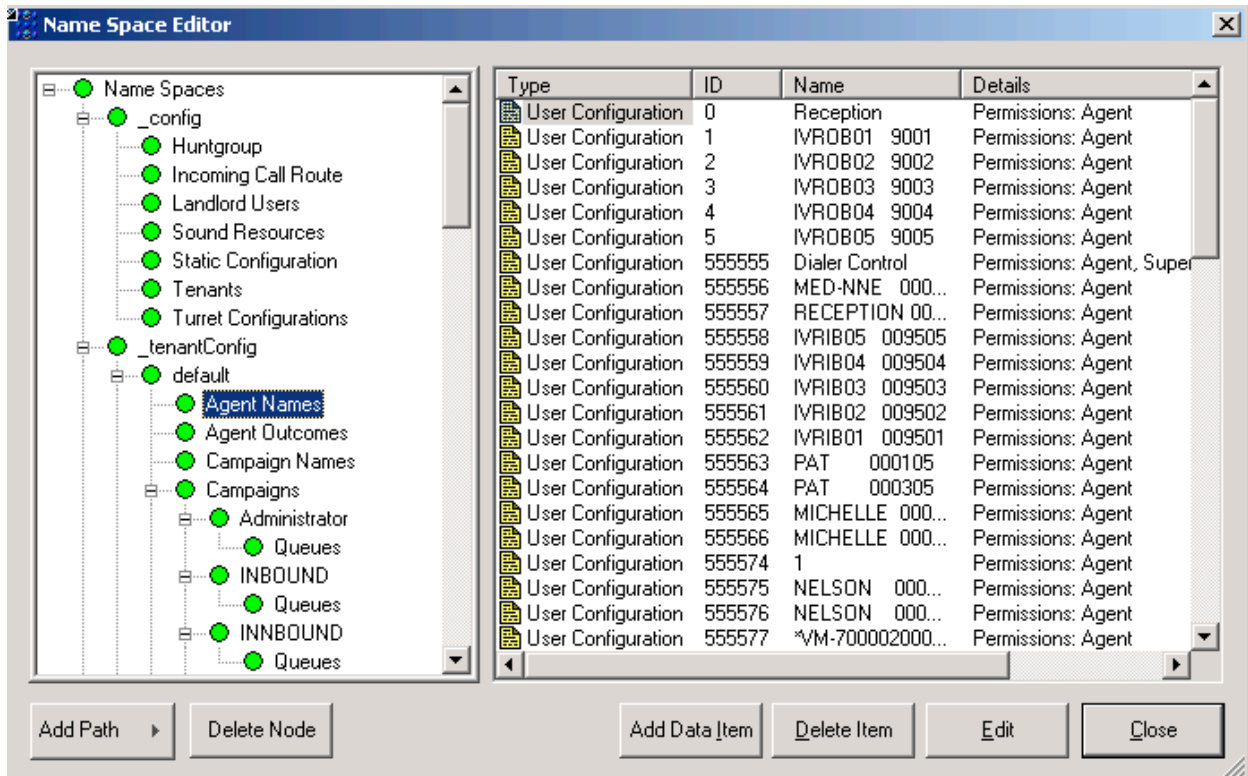
In our example, we created the standard system queue 800301, where 301 is the inbound extension for the PB agent.



14. Now, if needed, create the STANDARD Queue '800301' for the rollover, through 'System Queues'.

15. Select 'Add Data Item'

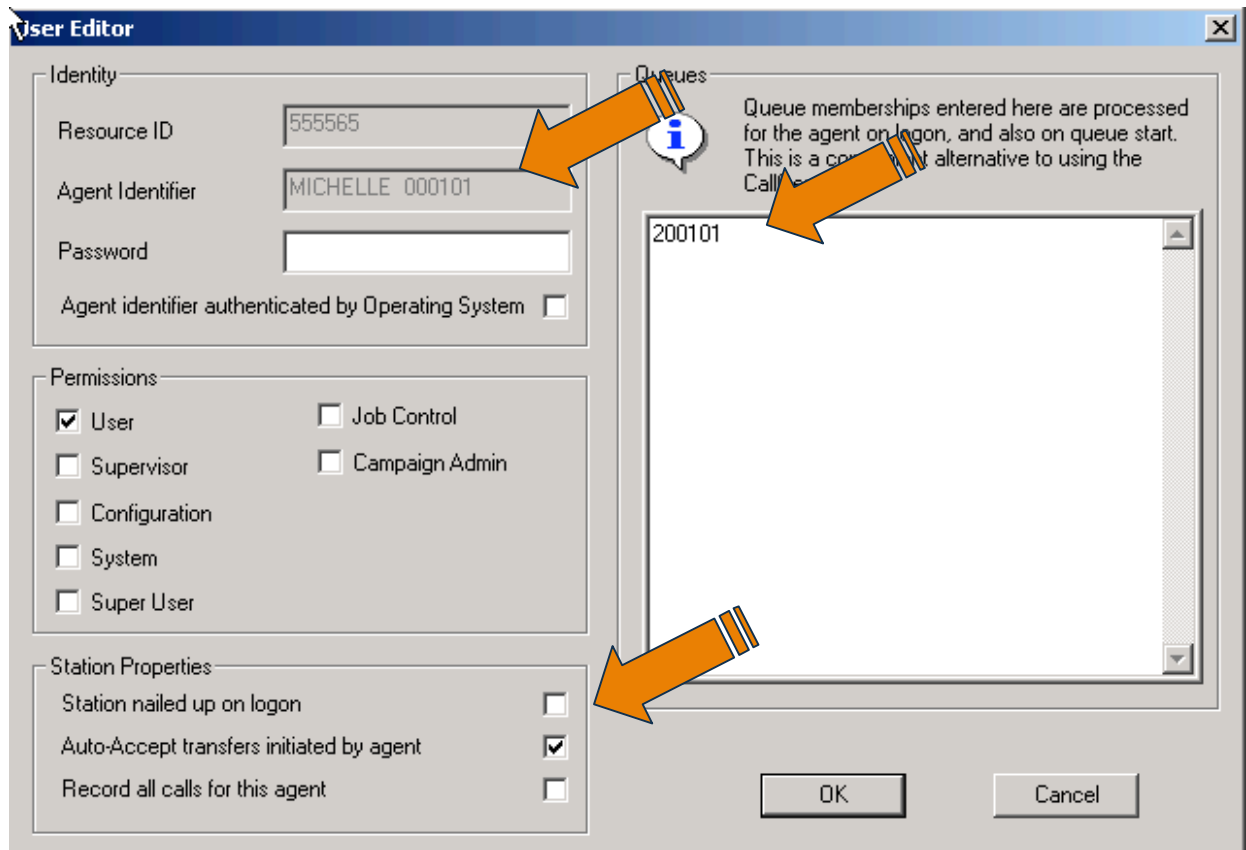
16. ID – the 800XXX, in this case 800301, where 301 is the agents IB extension
17. Queue Address – same as ID...800301
18. Description – choose a more helpful name...like 'Blended Agent X IB Overflow queue' or use what is shown
19. Timers section – leave all defaults **except** the RNA setting if you 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



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'



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



Company: 99

MENU: ITLOPT  
I-Tel Options menu

Date : 6/23/09

Time : 15:26:23

- 
- |                                 |                                  |
|---------------------------------|----------------------------------|
| 1. I-Tel campaign administrator | 13. Queue consolidation options  |
| 2. Display active campaigns     | 14. Contact series options       |
| 3.                              | 15. Non-Intelec users            |
| 4. Management options           | 16. I-Tel System Control options |
| 5.                              | 17. Support options              |
| 6. Other phone number options   | 18.                              |
| 7.                              | 19.                              |
| 8.                              | 20.                              |
| 9. I-Tel dialer reports         | 21.                              |
| 10.                             | 22. Return to main menu          |
| 11. Multiple dialer selection   | 23.                              |
| 12.                             | 24.                              |
| 50. Custom options              |                                  |

INTELEC

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Ready for option   

IOU OWE-IT COLLECT SERVICES, INC. 8.26

User : MICHELLE

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

MENU: ITLOPT  
I-Tel System Control Menu

Date : 6/23/09

Time : 15:27:26

1. Valid extensions
2. NNE's
3. Disposition codes
4. Playback messages
5. Phone number maintenance options
6. Local area codes
7. Copy disposition codes by company
8. DNIS text
9. Dialer configuration
10. System controls
11. IVR control selection

Ready for option   

F7-Exit

36. Now select option 1 - Valid extensions

```
Valid Extensions _____ 6/23/2009 15:28:32
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
  ───────────  ─────────  ─────────  ─────────  ─────────  ────
  1  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=Refresh  F6=Create  F12=Cancel
F14=Previous view  F15=Next view  F17=Top  F18=Bottom  F21=Print list
Copyright (c) 2005 by Quantrax Corporation.
```

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

Type choices, press Enter.

Outbound extension . . . . . 115

Turn on call recording? (Y,N, or " ") . . . Y

Remote extension . . . . . \_\_\_\_\_

Inbound extension . . . . . 315

Logon control . . . . . -

Voicemail extension . . . . . \_\_\_\_\_

Primary user . . . . . \_\_\_\_\_

Dialer code . . . . . A

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

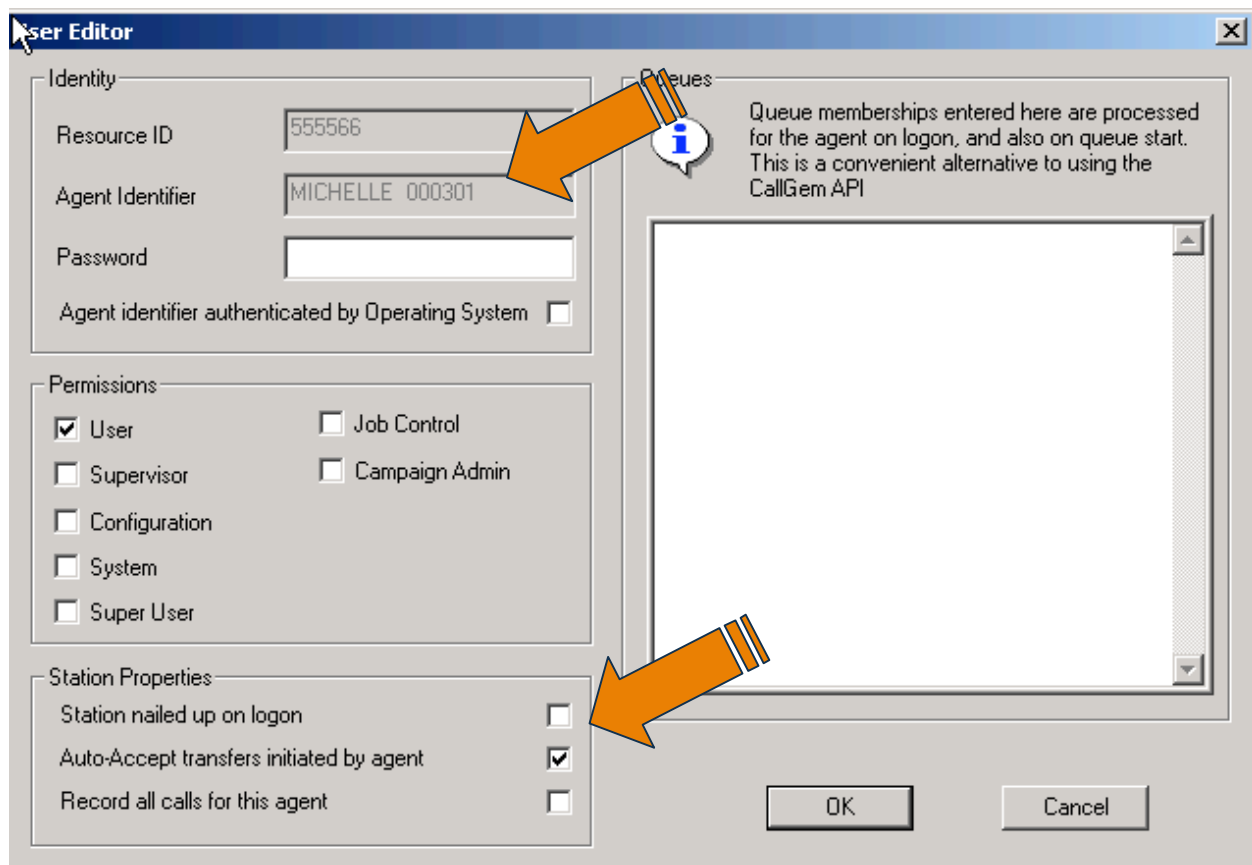
46. Primary user - leave blank for now

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`



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 . . . . . : 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
```



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

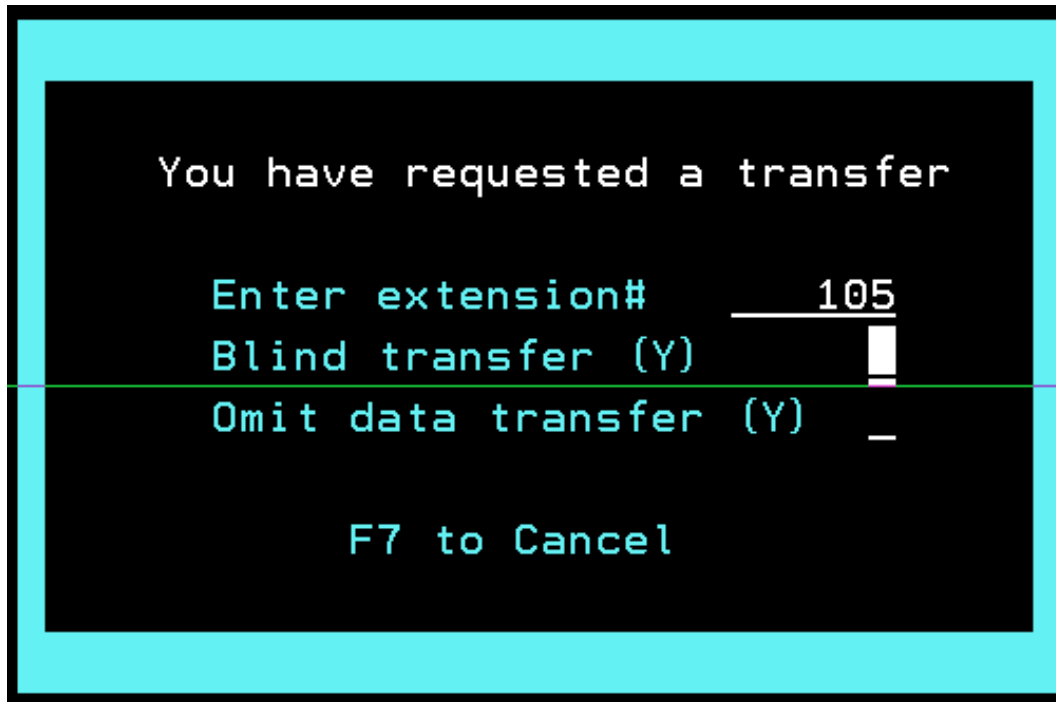
57. Make sure the dialer code is entered (it is usually A unless you have multiple dialers)

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 –



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**.