

# I-TEL OUTBOUND COLLECTOR GUIDE – Version 1, June 2008

**Preview:** Gives the ability to review an account prior to making a call. You hear the progress of the call. (ringing, busy, disconnected etc.) You have total control of when a call is made.

**Power :** You select your Processing Type etc and the system starts dialing for you automatically. You hear the progress of the call. (ringing, busy, disconnected, etc)

**Predictive/Progressive:** The system automatically dials accounts that have been selected by management based on a campaign name they will give you. You do NOT hear the progress of the call.

```
I-Tel Extension Verification

Your User ID is JAMIE
Workstation ID QPADEV002D

Enter outbound extension 106
F7-Exit
```

## I-Tel Extension Verification for options below

- 1) Enter the extension you will be using for your outbound calls
- 2) Answer extension when it rings. You are now connected to the dialer, and ready to accept calls

**Use F7** to back out of all Dialer option.

**NOTE:** You may be required to take one last call if you are in Predictive or Progressive

## Preview Dialing (Opt.2)

- 1) Enter outbound extension
- 2) Select work map options
- 3) Use dialer options to call

## Power Dialing (Opt.3)

- 1) Enter outbound extension
- 2) Decide what number should be automatically called first

```
"W" Dial Work Phone Number
"H" Dial Home Phone Number

Option : _

F7 - Exit
```

- 3) Select Work Map as usual
- 4) Wait for connect, and account to present

## Predictive (Opt.4) Progressive dialing (Opt.5)

- 1) Enter outbound extension
- 2) Enter Campaign provided by management
- 3) Wait for the account to present once the dialer has made a connection.

```
Predictive/Progressive Dialing
Campaign Name : LAB02
```

```
Account Processing (PREDICTIVE/PROGRESSIVE)

Campaign name : LAB02
Type of processing P
QCat
Time frame (A,M,P) A
User ID CURWIN

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

## Working the account from Smart code window, (Action, then TAB KEY, then ENTER)

### ACTION:

- X** - Wrap mode (is used to disconnect the call). You can continue to enter notes on the account and when you update the Smart Code you will be ready for the next call
- A** - Home Phone (is used to dial the home phone)
- B** - Work Phone (is used to dial the work phone)
- C** - Cell Phone (is used to dial the cell phone)
- D** - Additional numbers prompt (is used to dial any additional numbers you may have). A window will appear and you can key in the number you want dialed
- I** - Dial 411 (is used to make a directory assistance call)
- T** - Transfer Call (is used to transfer an existing call/account detail screen to another extension on the dialer)
- Other Phones** (TAB then "+") - Put a period (".") next to the number to be called and then ENTER

**Note:** "Preview dialing" - You can enter a Smart Code while talking to the debtor that will advance to the next account, BUT you MUST do an X-TAB and ENTER to disconnect the prior call. This behavior is ONLY in Preview dialing

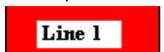
# I-TEL INBOUND COLLECTOR QUICK START GUIDE – *Note: For the Examples below we use “Line 1” as OUTBOUND, and “Line 2” as INBOUND.*



## Part I. Answering an Inbound Call



X-TAB-ENTER



- 1) The phone Rings and you get a message on the bottom of the intelc screen you are working in
- 2) Put the current call on **HOLD**
- 3) Answer your 2<sup>nd</sup> extension (Call appearance)
- 4) Hit the Escape (ESC) key. Note: This is the Attn key on an IBM keyboard
- 5) The Inbound call list will present:  
If there is a phone number match you will see the Debtors Info. Other wise it will say “No Match”



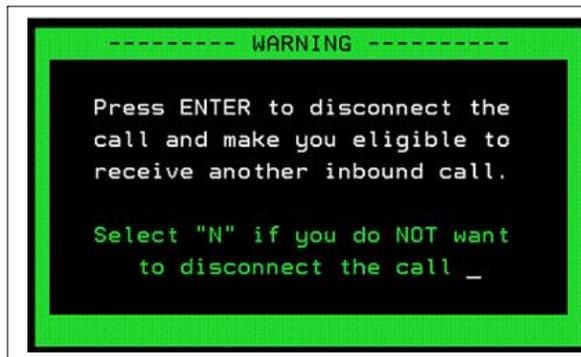
- a) Put an “I” next to the phone number displayed. This will either bring up the account or place you in “Account Inquiry” to search for the account.

*Note: F1 Account Inquiry: From here you can also go to “Account Inquiry” by hitting F1, in case the Phone number presented is NOT the correct debtor (i.e. an office number where multiple debtors work)*

- b) Once you are on the account you can work the Debtor as normal.

## Part II. Completing the call once you are done working the Debtor

- 1) Disconnect the call: In the smart code field put an “X”, then hit the “TAB” key, then hit the “ENTER” key. Or as we call it. “X-TAB-ENTER”
- 2) Once you have finished with your smart codes and updating the account, hit “F7” to be presented with this window:



NOTE: If you have not done “X-TAB-ENTER”, this will also disconnect the “

← Go to previous extension to continue working previous call

# I-TEL INBOUND COLLECTOR QUICK START GUIDE – *Note: For the Examples below we use “Line 1” as OUTBOUND, and “Line 2” as INBOUND.*

**Note: When working Inbound IT IS RECOMMENDED THAT YOU ONLY HAVE ONE INTELEC SESSION at a time. If you must have 2 sessions, you must use a second User ID.**

## 1<sup>st</sup> Time on INBOUND and what to expect

- **HOLD – When in doubt put the debtor on HOLD, and review the steps above. Do not just push buttons or you may lose your Dialer connection, AND one or both of the calls.**
- **HOLD – always remember to use your hold button before taking the inbound call.**
- **If you lose connection to the dialer, just sign out of Intelec, and sign back on. Finish up with the debtor, then log back into the dialer.**

When you first start inbound and you are talking to a DEBTOR, you will get a message on your screen and your Phone may ring... When this happens, as long as you have made yourself familiar with the STEPs above, there should be no problem, BUT...

When a call comes in AND:

- 1) **You hit LINE 2 before you put LINE 1 on HOLD?** YOU MAY LOSE YOUR CONNECTION TO THE DIALER and you may have hung up on line 1. Some phone systems will automatically put LINE 1 on hold. But do not assume this is the case. If you lose connection to the dialer. Sign off of your Intelec session and sign back in, finish working the debtor, and log back into the dialer.
- 2) **You don't answer it?** Nothing happens, the call goes to another extension or voicemail depending on your company setup.

# I-Tel Blended Transfer Quick Start: Softdial Versions 10.2.xx.xx and above.

This option creates the ability to transfer a call to an agent's outbound extension, eliminating the need for multi-extension phones (Separate extension for inbound and outbound calls).

## AS/400 Setup

1) **Valid Extensions:** (I-Tel Menu → I-Tel System Control options → Valid extensions). You **MUST** have the Outbound Extension setup in Valid Extensions before proceeding. If this Extension is already setup to be used by the dialer, then no changes need to be made. If this is the first time this Extension is being used by the dialer, you **MUST** first setup this extension (See the Inbound Call Flow Quick Start), and then recycle services.

2) **Hunt Group Setup:** (I-Tel Menu → Hunt groups).

From the Hunt Group screen hit **F6=Create** to create a new Hunt Group

```
                Create Hunt Groups                               6/18/2009 15:12:20
                                                                System:   S10E9B6C

Type choices, press Enter.

Group code . . . . . 200101
Group name . . . . . Michelles Blended Xfer HG
Group address . . . . . 200101
Inbound campaign name (blank = system). . . . . INBOUND
Voicemail extension . . . . .
Company number . . . . . 01
Dialer code . . . . . A
Hunt group type (S=Static). . . . . I
```

**Group Code:** The Dialer needs to know that this **Outbound** Extension will be taking transfers. To do this we identify the Extension by creating a 200000 series Hunt Group with the last digits being the extension. So if the example Extension is 101, then the Hunt Group to create would be 200101

**Group Name:** A useful description

**Inbound campaign name:** **MUST** say **INBOUND** in capital letters

**Voicemail extension:** **Leave Blank**

**Company number:** What company will they be working in?

**Dialer Code:** A is default, unless you are working in a multiple dialer environment.

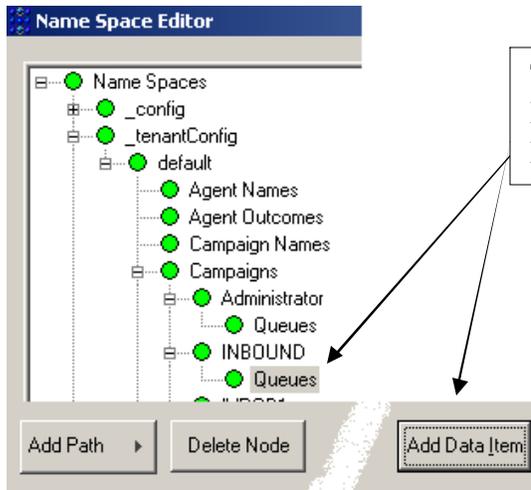
**Hunt group type:** **MUST** have a **T**

# Dialer Server / Softdial Setup.

Note: In a two dialer configuration, this setup is done ONLY on the Campaign Manager server

## Queue Configuration:

Bring up the Softdial Name Space Editor, and follow it now to the INBOUND Queue (Name Spaces → \_TenantConfig → default → Campaigns → INBOUND → Queues)



To access the **Queue Configuration** Highlight “Queues” and click on the “Add Data Item”

**Overflow (Optional)\*\*** : If the Agent has more then one extension on their phone, (Inbound and Outbound). This will allow a Blended Transfer to an agents OUTBOUND extension to roll over to their INBOUND extension. *You must create a NEW “Queue Configuration” but as an 800000 series in System Queues with the last digits being the INBOUND extension. Example: 800301.*  
 NOTE: If you don’t setup the overflow. If the receiving agent is not available, the transferring agent will retain the call.

**ID and Queue Address:** This is the same 200000 series created on the AS400

**Description:** Describe the use of this extension

Make sure “**Round Robin group**” DOES NOT have checkmark

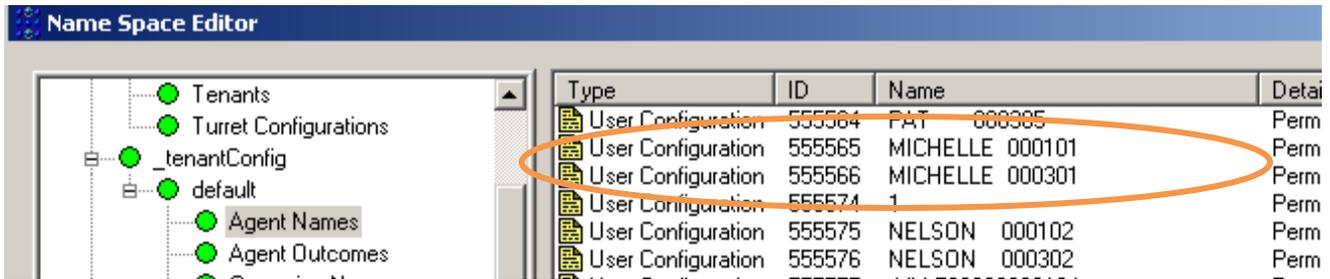
“**Allow Immediate blend or transfer for outbound agent**” MUST be checked

**Leave everything else as DEFAULT**

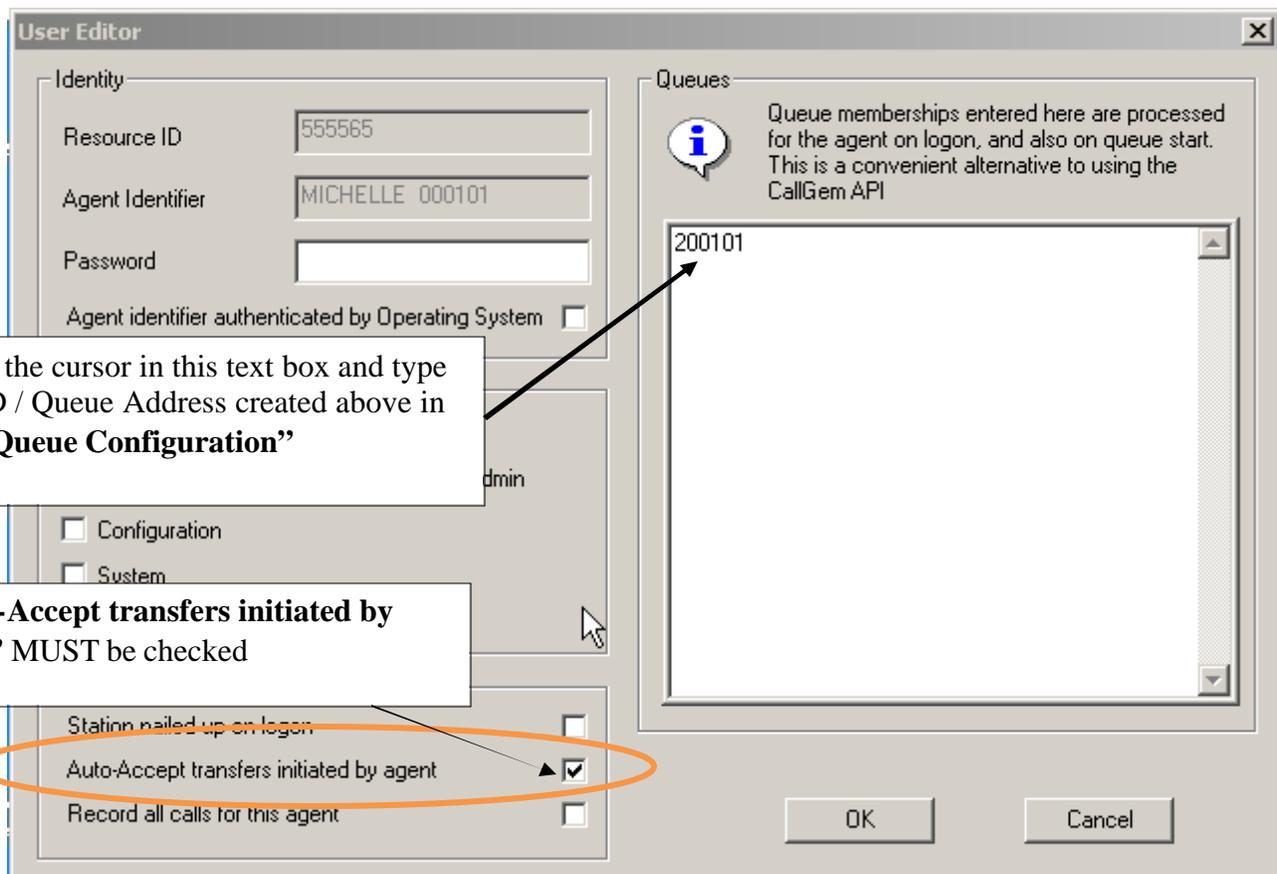
\*\* **800000 Overflow:** This needs to be setup as a standard “System Queue”. See the “Inbound Call Flow Quick Start” guide, and follow the example for the 700000 Series.

## Agent Name Extension Setup:

The first time a Valid Extension logs into I-Tel (As discussed in the AS400 section of this Quick Start), the Softdial software on the Dialer PC receives this new information and creates those same Extensions on the Dialer PC in the “Name Space” under “Agent Names”. Notice the Agents name, and Extension (after the 3 leading Zeros. These need to be “Edited”.



**Outbound Extension Changes:** Highlight the agent’s Outbound extension and select “Edit” from the bottom of the “Name Space Editor”. This will present the “User Editor”



Place the cursor in this text box and type the ID / Queue Address created above in the “Queue Configuration”

“Auto-Accept transfers initiated by agent” MUST be checked

**Inbound Extension Changes:** Highlight the agent’s Inbound extension and select “Edit” from the bottom of the “Name Space Editor”. This will present the “User Editor”. The only change that is need here is to check the “Auto-Accept transfers initiated by agent”

