

# SETTING UP A CAMPAIGN IN I-TEL

The purpose of this guide will be to walk you through setting up a Predictive dialer campaign. See the dialer handbook for detailed information on different settings.

## Part 1) I-Tel on the iSeries setup

Go to option 1, Campaign administrator. Take F6 to create new campaign gives you the first screen, pressing **ENTER** cycles through the rest:

```
Basic Campaign Information
Campaign name . . . . . MEM HOSP
Dialer code . . . . . A
Campaign type . . . . . 4
3=Progressive
4=Predictive
7=Unattended
```

**Campaign Name** – Select a meaningful name that will be easy for an agent to use.

Default is “A” unless you have multiple dialers

**Progressive** – one call dialed per agent. **Predictive** – launches more than one call for each agent. **Unattended** – For leaving a recorded messages or using outbound IVR.

```
Campaign Selection Criteria
User ID . . . . . JAMIE
Time frame (A,M, or P) . . . . . A
QCat . . . . . 101
Processing type . . . . . P
```

This is the work queue, where the accounts to be dialed are located.

```
Basic Campaign Control/Management Options
Allow timed recalls? . . . . . N
Start campaign automatically? . . . . . N
Generate idle campaign messages? . . . . . Y
Minutes before issuing idle message . . . . . 10
Message queue for campaign messages . . . . . *SYSOPR
Message queue library . . . . .
Turn on call recording? (Y,N, or " ") . . . . . N
```

**Recalls “Y”** - Recalls are allowed, “N” - recalls are not allowed in the campaign.  
**“Y” if you want** this campaign automatically started when the Mini-Server is started. Otherwise you must start manually each morning.  
**Defaults** – See dialer handbook for details

“Y” if you want accounts that have been dialed (but not contacted) in a campaign, to be dialed again when you restart this campaign.

“Y” if you want accounts that were not contacted eligible to be re-selected in the same or a different campaign. If you have a Note: “Y” here, you **MUST** have a “Y” in the field “Restart control

```
Advanced Campaign Control Options
Restart control option (Y or " ") . . . . . Y
Leave non-connects eligible for recalls? . . . . . Y
SIT/AMD control option (0, 1, or 2) . . . . . 2
Playback message code . . . . .
```

**SIT/AMD control option:** - (0=None, 1=SIT, 2=SIT & AMD) Do you want the dialer to do SIT detection or SIT detection and AMD (answering machine detection)? Note: 0 = No detection, All connects will go to the collector including Buses, Operator Messages etc.

**Playback message code:** - If you are doing AMD and want to play a message if an answering machine has been detected, enter the message code here.

```
— Campaign Creation Summary
MEM HOSP
Total number of records : 278
Records eligible to dial : 278
Records with Home Phone : 237
Records with Work Phone : 63
Press Enter to return to campaign list.
```

These statistics are pulled directly from the work queue that was referenced above, and is what you can expect in your campaign.

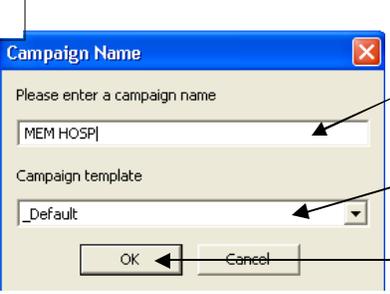
Opt	Campaign Name	Dialer Code	Campaign Status	Queue File
—	DCOLLINS	A	Ended	TQA0115IT
=	MEM HOSP	A	Ended	TQA0201IT

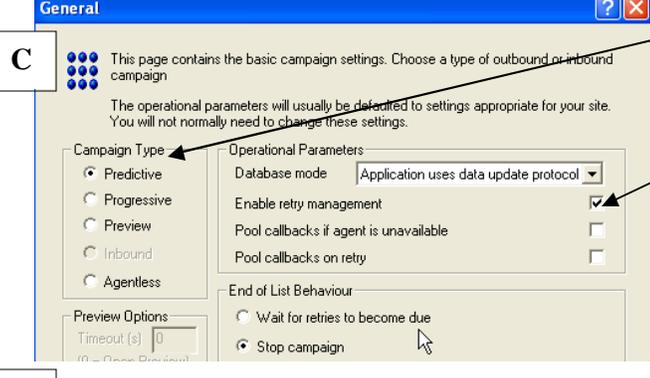
**Make a note of the “Queue File”.** You will need this when you create the campaign on the Dialer PC

This completes the iSeries setup for this campaign.

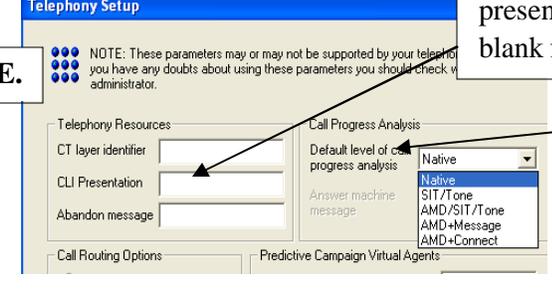
## Part 2. Dialer Server setup - from the Campaign Manager on the PC.

**A**  Click here to create a new campaign

**B**  Type your campaign name here. NOTE: IT MUST BE IN CAPS  
Choose template  
Click "OK"

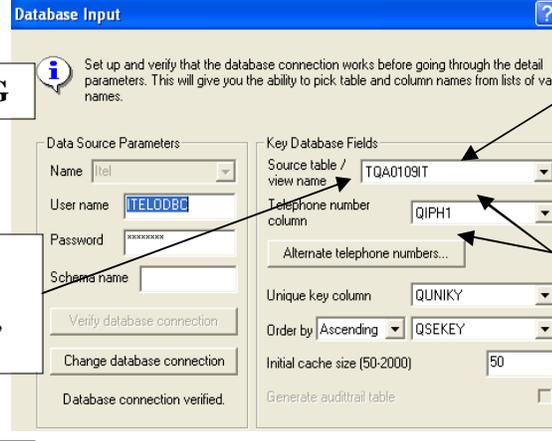
**C**  Make this the same type of campaign you created on the AS400 (E.g. Predictive)  
Check this box if you want to be able to dial multiple telephone numbers and if you want to be able to retry non-connects  
Make sure the rest of the screen looks like this one and click "Next".

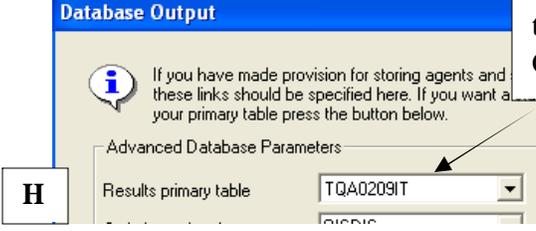
**D**  Do not change this screen. Click "Next"

**E**  Caller ID to be presented (Leave blank for default)  
Set the call progress  
Leave the rest as default and click "Next"

**F** Click "Next" past:

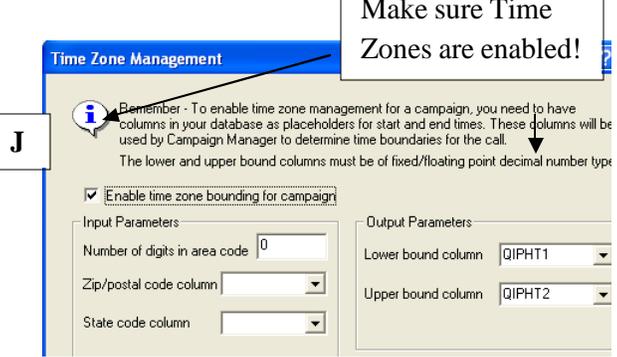
- Dial Tuning
- Retry Options
- Schedule

**G**  Put the "Queue file" from the iSeries here. (Mini-Queue file)  
Select phone numbers to call  
Use rest as default and click "Next"

**H**  Needs to be the same - Click "Next"

**I** Click "Next" past:

- Call Recording - Defaults should be setup
- Data Selection - (Filters)  
See handbook for default settings

**J**  Make sure Time Zones are enabled!

**K** "Do not call lists" Click "Finish" to complete the campaign OR "Back" to review setups

# UNATTENDED CAMPAIGNS IN I-TEL

Unattended campaigns are designed to play a pre-recorded message where human interaction (debtor or agent) is not required.

## From the Dialer PC

### Create the pre-recorded message

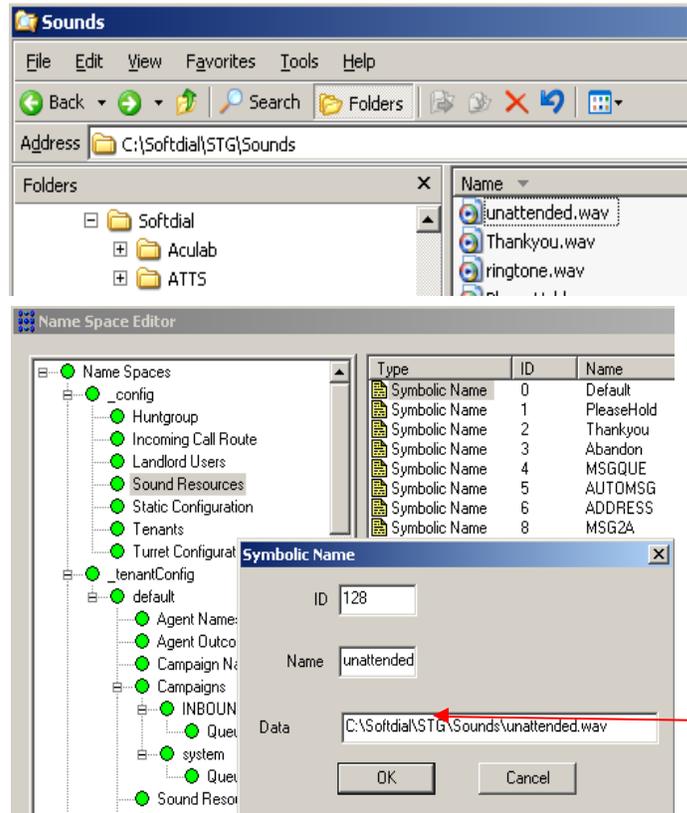
- Needs to be a .wav file
- Needs to be saved as CCITT u-law
- Needs to be saved in:  
"C:\Softdial\STG\Sounds\" (name of wav file)"

### Symbolic Name - Create a sound resource item in the Name Space Editor on the PC

The "Data" path is case sensitive. If you use upper and lower case letters in the .wav file name OR the file path, you must do this also when filling out the "Symbolic Name".

### Create a Campaign as normal but with the exceptions shown below on the:

- General tab
- Telephony tab



### "General" Tab

Campaign Type

Predictive

Progressive

Preview

Inbound

Agentless

### "Telephony Setup" tab

Agentless Campaign Options

Number of agents (0 - 9999)

Play Message

Message to play

Dial Progressive

Number of agents/licenses to use

Select "Play message" from the dropdown

**Symbolic Name:** The message / .wav file created to be played. This is case sensitive and **MUST** match the "Name" from the "Symbolic Name"

## Create the campaign on the AS400 side

Create the campaign as you normally would with the exception of the "Campaign Type". This needs to be set at "7=Unattended"

```

Basic Campaign Information
Campaign name . . . . . :
UNATTENDED2
Dialer code . . . . . : A
Campaign type . . . . . : 7
    3=Progressive
    4=Predictive
    7=Unattended
    
```

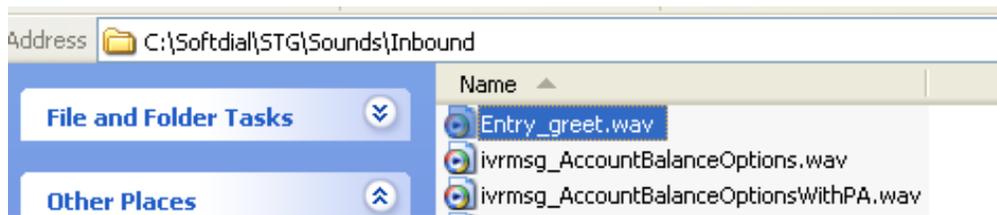
# UNDERSTANDING SOUND RESOURCES IN I-TEL

(This uses Queue Entry Greeting as an example)

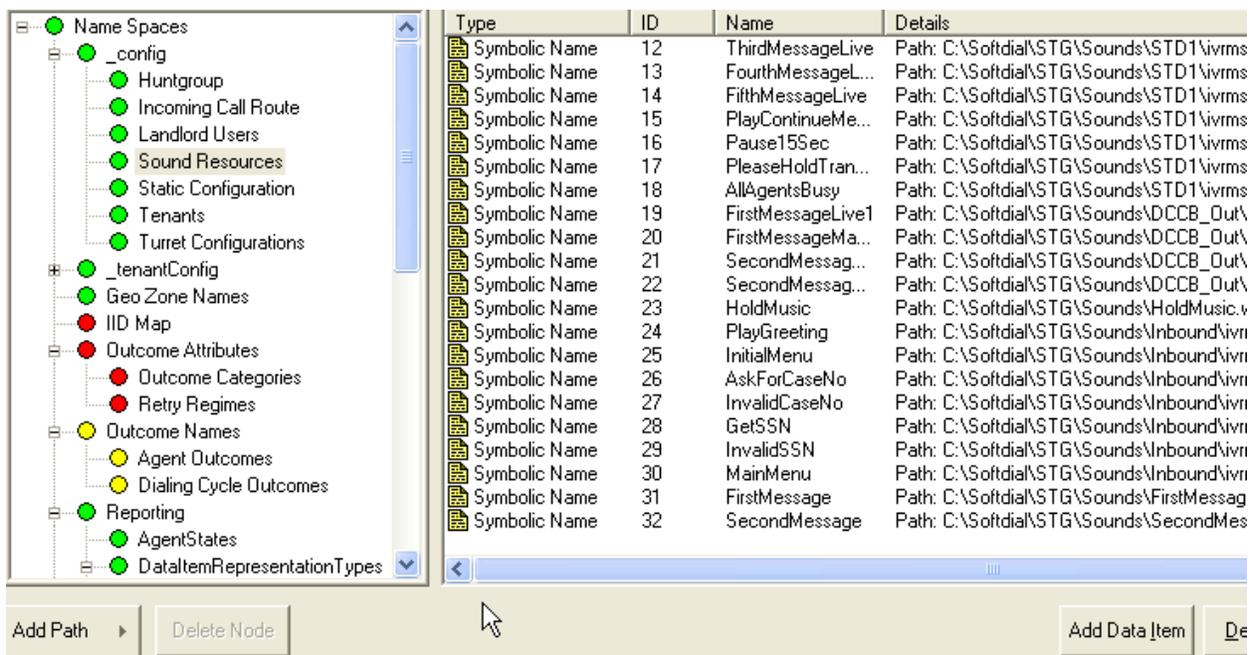
Sound resources gives you the ability to play a wav file (Music or message) while a caller is waiting to be picked up by an agent. What WAV gets played will be based on the inbound hunt group. Each hunt group can have it's own WAV.

First, you will have to record a message as a .WAV file, which MUST be saved as ULaw protocol. The dialer handbook has instructions on how to do this.

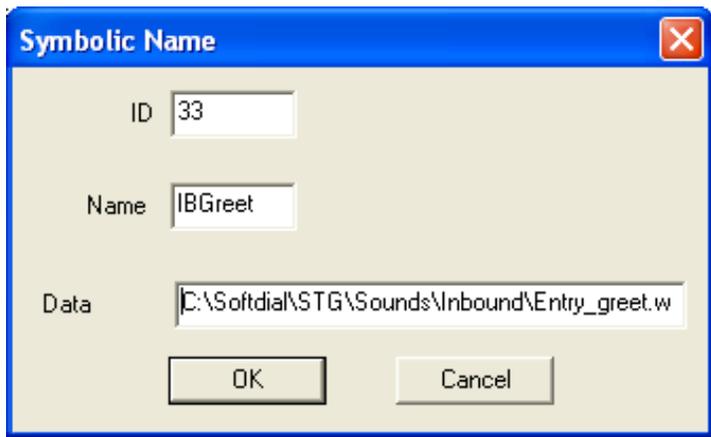
Once you create this WAV file you need to put it in a folder on your Dialer, on our example dialer we put it in "C:\Softdial\STG\Sounds\Inbound".



You will then need to go to the Softdial Name Space Editor, and highlight "Sound Resources"



Now you need to tell Softdial where that file is, so it can be used. So click on the "Add Data Item" button.



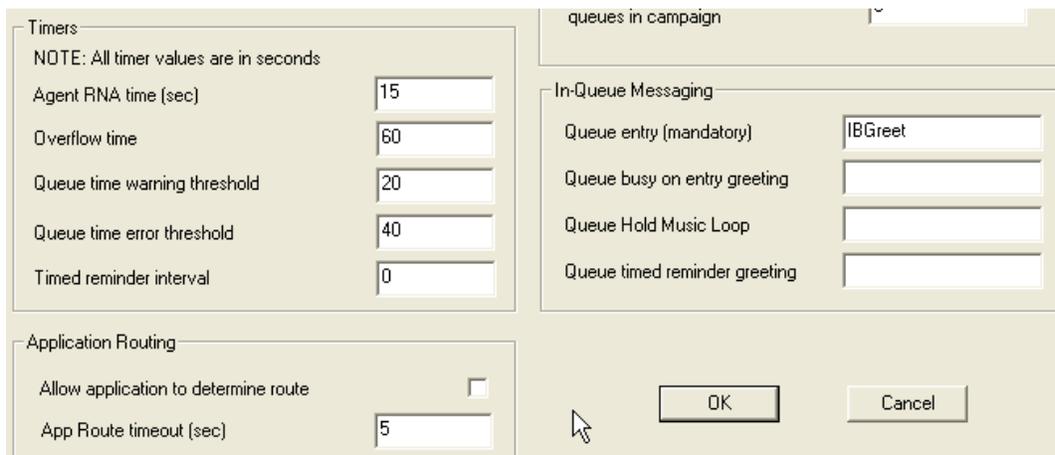
**ID:** This will automatically populate in newer versions of I-Tel. If it does not populate look under the “Sound Resources” for the last ID number and populate this field with the next highest number.

**Name:** This is the *user-friendly name* (Symbolic name) that you will assign at the hunt group level.

**Data:** This is the file path. You will have to fill it in EXACTLY like it is in the file manager including the file name. Example: “C:\Softdial\STG\Sounds\Inbound\Entry\_greet.wav”

Click OK when done

Go to the hunt group for which this message is to be played and bring it up.



The “Queue entry” field is where you will key in your user-friendly “**Name**” (Symbolic name) created above, in this case, **IBGreet**. You **MUST** use the same upper and lower case lettering.

**Note:** When using the “Queue entry” field to play a message, you must add the length of time that this message will play to the time in the “Overflow time (sec)” field.

Example

- 20 “Queue entry” message is 20 seconds long
- + 40 Overflow time – How much over flow time once the message has played
- 60 “Queue entry and Overflow time combined gives you the “Overflow time” of 60 seconds

# SETTING UP VOICE MAIL / SENDING CALLS TO THE PBX

This guide picks up from where agent Hunt Groups have been created on the dialer and the iSeries, and focuses solely on understanding “Voice Mail”.

## Step 1) Create a Voice Mail/PBX Ext. “Hunt Group” (Where to route the call)

900000 Series – It is important to remember that Voice Mail Hunt Groups are created as a 900000 series, so the dialer can recognize it as a “Voice Mail”. You will also need to include the Voice Mail extension in this naming of this Hunt Group.

**Example:** The Voice Mail extension we want to send the call to is 440, so the Hunt Group we will create is: **900440**

**Name Space Editor**

- A) Highlight “Huntgroup”
- B) Click “Add Data Item” to bring up the window below

**Huntgroup Editor**

- C) These two fields are the SAME and MUST be a “900000” series for Voice mail (Example is 900440)
- D) The description of this Hunt Group  
Leave Blank
- E) Specify in seconds how long the IB call should ring. **Make sure it is long enough for your Voice Mail to pick up!** 1 ring is about 6 seconds.
- F) **Overflow time** – If a debtor is leaving a message, and a 2<sup>nd</sup> debtor is queued up after that one to leave a message... How long do you want to let the 2<sup>nd</sup> debtor wait, before you DROP that 2<sup>nd</sup> debtor’s call?
- G) The actual Voice Mail extension.
- H) Leave the rest as defaults and press “OK”

Fields in Huntgroup Editor:  
 ID: 900440  
 Address: 900440  
 Description: Voicemail for Med. Huntgroup  
 Campaign (blank=system):  
 Agent RNA time (sec): 18  
 Overflow time (sec): 600  
 Overflow address: 440  
 Overflow on group busy immediately:   
 Round-Robin group:   
 Allow application to determine route:   
 App Route timeout (sec): 5

## Step 2) Add the Voice Mail to your existing Hunt Group...

**Name Space Editor**

- A) Highlight the 700000 series hunt group you are adding the Voice Mail to and click “Edit”. In this example we are using **702120**

**Huntgroup Editor**

- B) Specify in seconds how long the IB call should ring at an agent’s extension before rolling over to the next available agent.
- C) Specify in seconds the total time a call should be offered to agents within the HG before rolling to the Voice Mail (Overflow address)
- D) Put the 900000 series “Voice Mail” Hunt Group code created in step 1 here.
- E) If all agents are busy, this will *immediately* send the call to the overflow address (Voice mail).

Fields in Huntgroup Editor:  
 ID: 702120  
 Address: 702120  
 Description: Medical Collections  
 Campaign (blank=system):  
 Agent RNA time (sec): 18  
 Overflow time (sec): 54  
 Overflow address: 900440  
 Overflow on group busy immediately:   
 Round-Robin group:

### Step 3) Adding the Voice Mail extension to the iSeries

Now go to the iSeries from the Main Menu → 2. Management menu → 15. I-Tel options → and finally 8 for hunt groups.

```

Hunt Groups                                     2/27/2007 15:36:08
System: S10E9B6C
Position to . . . . . Starting value
Type options, press Enter.
  2=Change  3=Copy  4=Delete  5=Display  6=Print  8=Group members

Opt Group Code  Group Name                Group Address  Dialer Code
-  IB TESTB4    system                    700106        A
-  IVRGROUP2    IVRGROUP2
-  IVRHG        IVR AGENTS
-  IVRQTXMAIN   IVR - MAIN HUNT
-  IVRQTX105    IVRQTX - PROGRA
-  IVRQTX191    IVRQTX - SUPPOR
-  IVRQTX295    IVRQTX - PROGRA
-  LABINB      INBOUND FOR 301
-  LABROLL     TESTING ROLL OVER        700002        A
2  MED-COLL     Medical Collectors        702120        A
-  MEDICALHG    Medical hunt group        700010        A
More...

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

A) Put a 2 next to the Hunt Group you are adding Voice Mail to and press "ENTER". The example is 702120, and must match the HG on the dialer.

```

Change Hunt Groups                             2/27/2007 15:32:34
System: S10E9B6C
Type choices, press Enter.

Group code . . . . . : MED-COLL
Group name . . . . . : Medical Collectors
Group address . . . . . : 702120
Voicemail extension . . . . . : 440
Company number . . . . . : 99
Dialer code . . . . . : A
Hunt group type (S=Static). . . . . : -
  
```

B) Add the Voice Mail extension number here. The example being 440

### Press "ENTER" to complete the setup

Here is a summary of setting up voice mail.

- 1) Create a voicemail Hunt Group on the dialer
- 2) Add that Voice Mail Hunt Group to your agent Hunt Group on the dialer
- 3) Add the extension number to the same agent Hunt Group on the iSeries.

### Trouble shooting Voice Mail problems

PBX – Voice mail extensions are routed through the PBX, If the Voice mail is not going to the extension you have setup in the Hunt Group, but to a different one, chances are it is a PBX setup issue.

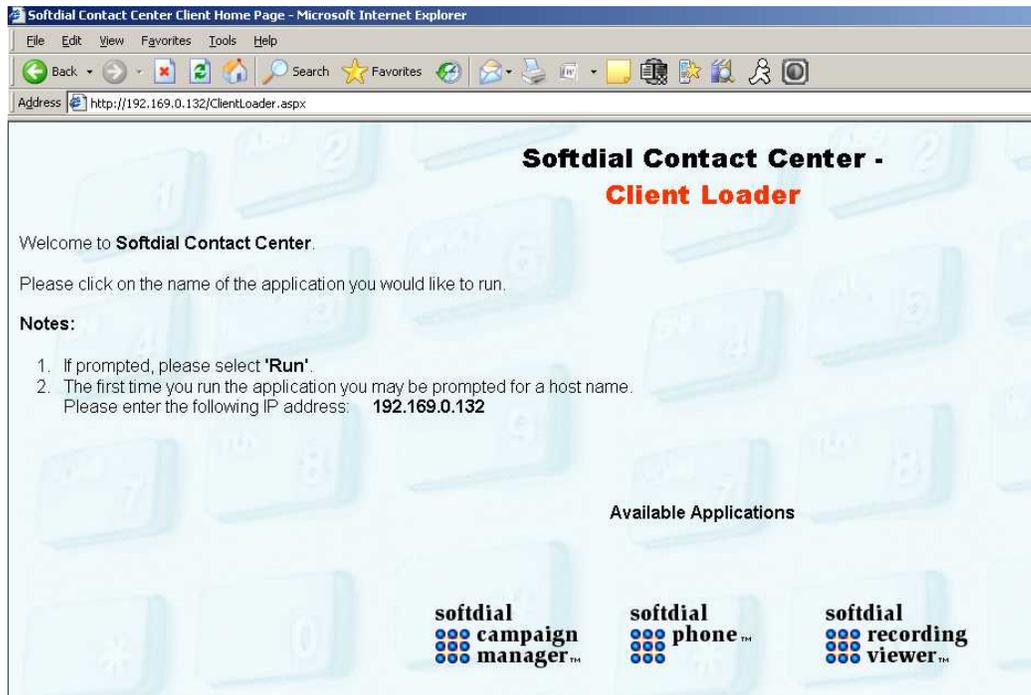
# I-TEL CALL MONITORING USING SOFTDIAL PHONE

This option gives you the ability monitor agents during live calls through the dialer.

**NOTE:** If for some reason the Softdial phone freezes you will need to shut it down through the Task Manager. This is done by using Ctrl-Alt-Delete, Right clicking on “SoftdialPhone.exe” and selecting “End Process”

## Accessing the Softdial Phone

From Internet Explorer, put the Dialer IP address in the “Address” bar and press ENTER.



This will bring up a web page listing the Softdial options – Click on “Softdial Phone” to bring up the Dialer Connection



**Server name** - is the IP address of the dialer OR if you are required to use the windows HOST table, the name you gave to the dialer.

**Tenant name** – default (All lower case)

**Note:** If you do not get the next screen, you may need to setup the host table on the PC using the Softdial Phone. Instructions are at the bottom of this document.



The image shows a software dialog box titled "Agent Log On". It is divided into two main sections: "Connection to CallGem" and "Advanced Settings".

**Connection to CallGem:**

- Server Name: dialer
- Tenant Name: default
- Change Connection button
- Campaign: system (dropdown menu)
- User ID: Dialer Control
- Password: \*\*\*\*
- Extension: 240
- Full Name: jamie
- Log On, Cancel, and Advanced... buttons
- Don't ask me again

**Advanced Settings:**

- Nail Up Phone Extension?
- Record All Calls?
- Allow SIP Addresses?

Click on ADVANCED to see “Advanced Settings” and set those up as you see here.

**Campaign** – The active campaign to be monitored

**User ID** – This is setup in the namespace by Management.

**Password** – Tied to the User ID setup in the namespace by Management

**Extension** – Location the user will be monitoring from. This can be a phone extension on the PBX OR a phone number that can be dialed out (E.g. a cell phone).

**Full Name** – Any name will work.

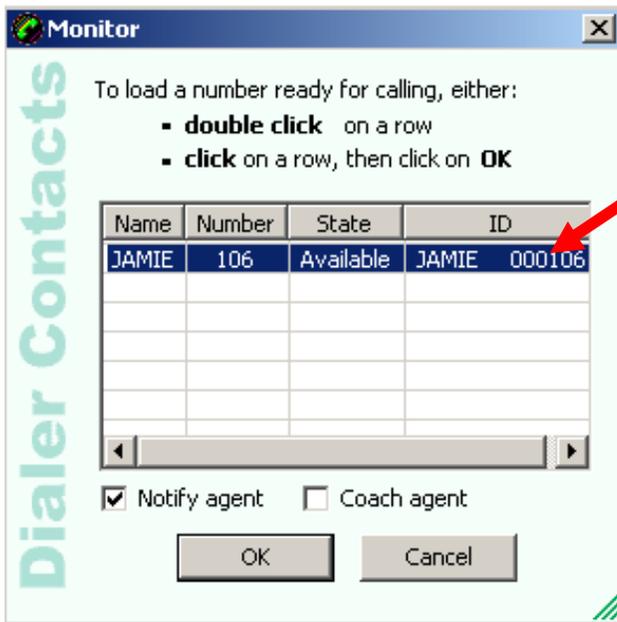
Click “Log on” When ready



Pick up your Extension/Phone when you see this box



Right Clicking on this Phone button presents you with the screen below

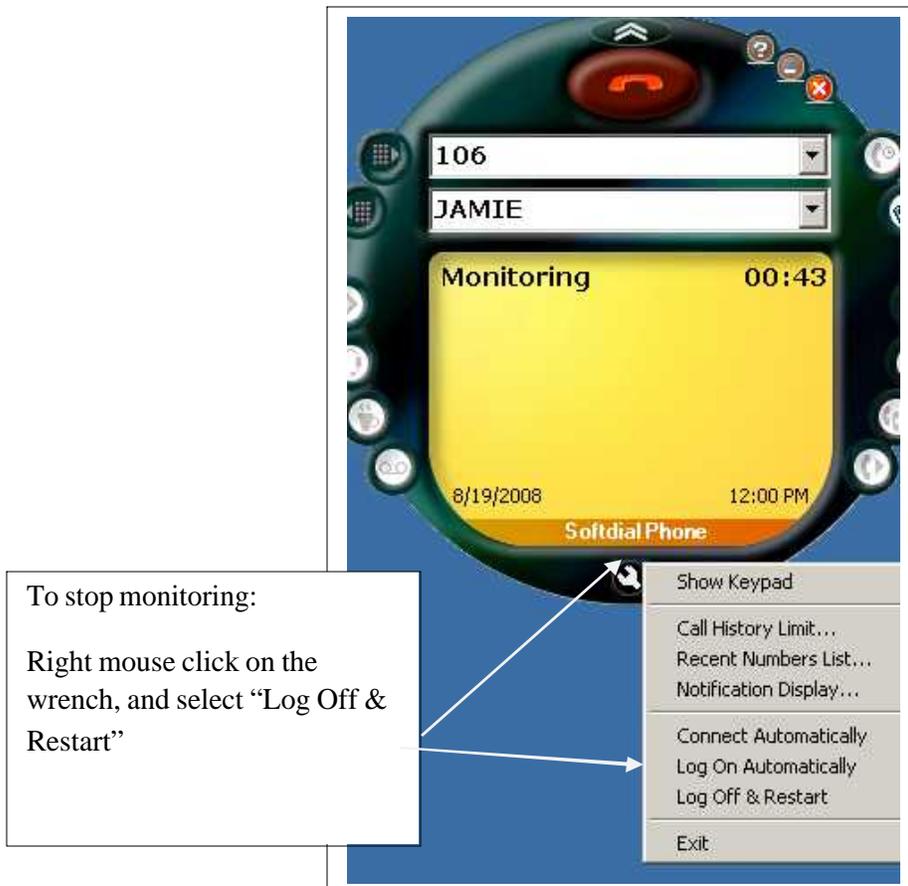


Highlight the Agent to be monitored and click "OK"

*Note: You may not see all the agents that are logged in at first... The Agent Status may need to change before they appear (i.e. Logged, completed, talk, wait, etc)*



At this point you should now hear the agent, or the agents “Heart-beat”



## Adding the dialer IP address to the Host Table.

Pull up the HOST table in notepad. It can be found in “C:\WINDOWS\system32\drivers\etc”, the file name is called “hosts”

```
# .....
# For example:
#
#      102.54.94.97      rhino.acme.com      # source server
#      38.25.63.10     x.acme.com          # x client host
127.0.0.1      localhost
192.169.0.132  dialer
```

You will see the IP address for “localhost” already. Add the IP address and the name “dialer”, the same way you see in this example above and save the host table.

Next time “Call Monitoring” is run, you will use the word “dialer” (The name used in the host table) instead of using the IP Address for the “Server Name”



The image shows a dialog box titled "Dialer Connection". It has two text input fields: "Server name" with the value "dialer" and "Tenant name" with the value "default". Below the fields are two buttons: "OK" and "Cancel". At the bottom left, there is a checkbox labeled "Don't ask me again" which is currently unchecked.