



Avaya Solution & Interoperability Test Lab

Application Notes for Avaya Proactive Outreach Manager 3.0.3 with Inisoft synTelate 5.1.1 using CTI and outbound voice campaigns– Issue 1.0

Abstract

These Application Notes describe the configuration steps required for IniSoft synTelate Enterprise 5.1.1 to successfully interoperate with Avaya Proactive Outreach Manager 3.0.3 using Computer Telephony Integration and outbound voice campaigns. Inisoft synTelate is a call center scripting application for creating inbound and outbound campaigns and consists of the synTelate Designer and the synTelate Enterprise Agent. IniSoft synTelate Enterprise Agent was compliance tested against Avaya Proactive Outreach Manager using outbound voice campaigns.

Readers should pay attention to **Section 2**, in particular the scope of testing as outlined in **Section 2.1** as well as the observations noted in **Section 2.2**, to ensure that their own use cases are adequately covered by this scope and results.

Information in these Application Notes has been obtained through DevConnect Compliance Testing and additional technical discussions. Testing was conducted via the DevConnect Program at the Avaya Solution and Interoperability Test Lab.

1. Introduction

These Application Notes describe a compliance-tested configuration comprised of Avaya Proactive Outreach Manager (POM) and Inisoft synTelate Enterprise 5.1 (synTelate). Inisoft synTelate uses a Telephony Server Application Programming Interface (TSAPI) link with Avaya Aura® Application Enablement Services (AE Services) to take control of Avaya IP Deskphones.

Inisoft synTelate Enterprise is a call center scripting application for creating inbound and outbound campaigns, and consists of the Inisoft synTelate Designer and the Inisoft synTelate Agent. Inisoft synTelate Designer is a graphical tool that is used for the definition of the call flow and agent screens. Inisoft synTelate database consists of client records that are used during inbound and outbound campaigns which are imported from Avaya Proactive Outreach Manager. Inisoft synTelate Agent uses Avaya Proactive Outreach Manager API (Agent API) to communicate with Avaya Proactive Outreach Manager. This allows Inisoft synTelate to perform operations such as logging in and out the agent, joining a job, changing the agent state, handling calls and setting completion codes. Inisoft synTelate uses a TSAPI link to Avaya Aura® Application Enablement Services to receive inbound call events and to control the call (answer, hold, retrieve, hangup, etc.).

During compliance testing, Outbound and Managed campaign types were run. Outbound campaign focuses only on outbound calls initiated by Proactive Outreach Manager. Managed campaign is a special type of Outbound campaign where the agent releases the call to be dialed after reviewing the customer information.

2. General Test Approach and Test Results

The interoperability compliance testing evaluated the ability of synTelate to carry out call handling functions in a variety of scenarios through its TSAPI and Agent API interface with AE Services and POM, respectively. The feature test cases were performed both automatically and manually. Outbound calls were automatically placed and delivered to synTelate Agent by POM, and inbound calls were manually placed and delivered to synTelate Agent by Communication Manager. Different types of jobs were exercised, along with different actions initiated from synTelate Agent, to verify proper generation and handling of supported messages from the POM Agent API and from Application Enablement Services TSAPI. The POM Campaign Manager and Monitor was used to start/stop jobs. The verification included checking the display of fields, options, and values on synTelate Agent, and checking the exchanged API messages in the designer and agent logs. All test cases were executed.

2.1. Interoperability Compliance Testing

The feature testing focused on verifying proper display of the customized synTelate Agent with appropriate options, fields, and values for the following scenarios:

- Outbound and managed jobs
- Log in, join job, go on/off break, leave job, and logoff
- Hold, retrieve, call transfer, conference, place manual call, agent drop, customer drop, release line/hang-up, and finish work.
- Set callback and update customer fields

2.2. Test Results

All test cases that were executed have successfully passed.

2.3. Support

Technical support on synTelate can be obtained through the following:

- Phone: (603) 383-4999 or +44 (0) 141-552-8800
- Email: support@inisoft.co.uk

3. Reference Configuration

The configuration used for the compliance testing is shown in **Figure 1**. In the compliance testing, synTelate used the Agent API to monitor and control outbound calls for the agents, and used TSAPI to monitor and control the inbound calls for the agents.

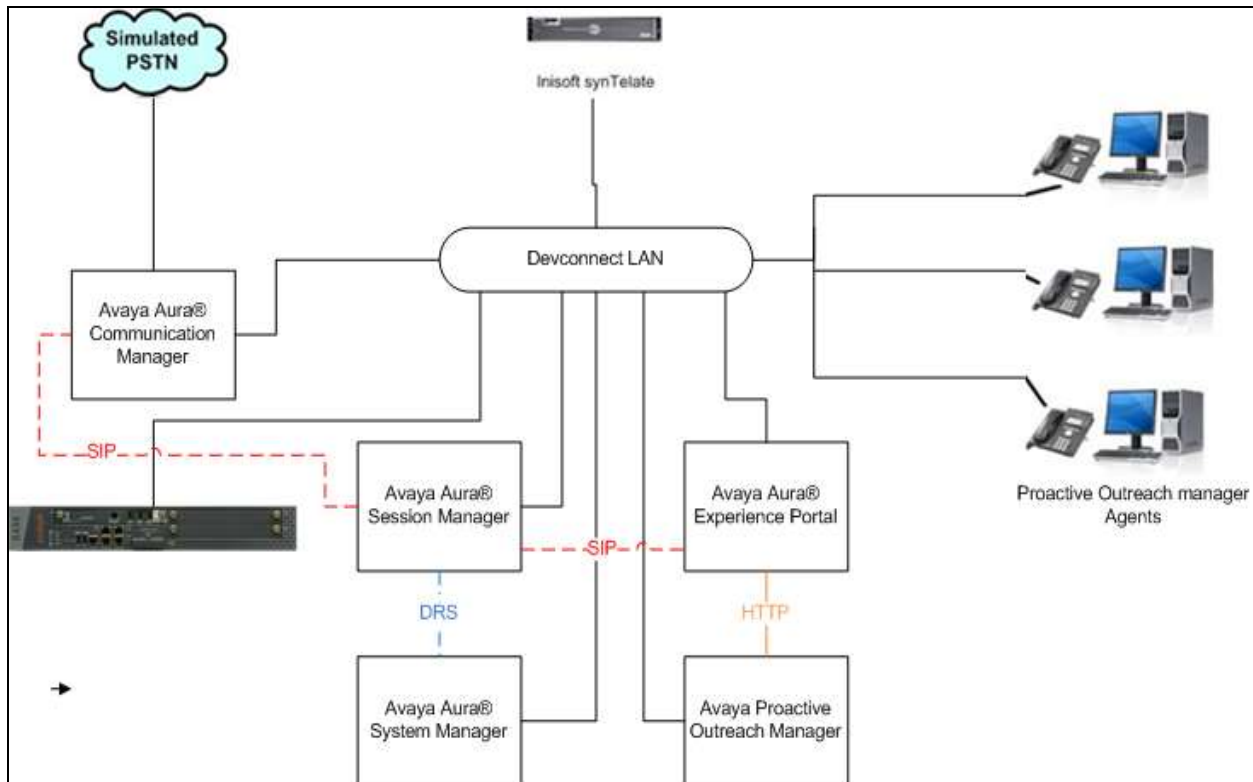


Figure 1: Inisoft synTelate with Avaya Proactive Outreach Manager using CTI and outbound voice campaigns

4. Equipment and Software Validated

The following equipment and software were used for the sample configuration provided:

Equipment	Software
VMware virtual machine	Avaya Aura® Communication Manager 7.0.1 CM 7.0.1.0.0.441.23012
G430 Media Gateway	FW 37.21.0
VMware virtual machine	Avaya Aura® Experience Portal 7.1.0.0.1107
VMware virtual machine	Avaya Proactive Outreach Manager POM.03.00.03.00.008-r23999
VMware virtual machine	Avaya Aura® Application Enablement Services 7.0.0.0.0.13-0
Inisoft synTelate Enterprise	5.1.1

5. Configure Avaya Aura® Communication Manager

The information provided in this section describes the configuration of Communication Manager relevant to this solution. For all other provisioning information such as initial installation and configuration, please refer to the product documentation in **Section 11**.

The configuration illustrated in this section was performed using Communication Manager System Administration Terminal (SAT).

5.1. Configure the Avaya Aura® Communication Manager Connection to Avaya Aura® Application Enablement Services

The connection between Communication Manager and AES is assumed to be already in place however the steps required to set this connection are listed in the sections below.

5.1.1. Verify System Features

Use the **display system-parameters customer-options** command to verify that Communication Manager has permissions for features illustrated in these Application Notes. On **Page 3**, ensure that **Computer Telephony Adjunct Links?** is set to **y** as shown below.

display system-parameters customer-options		Page	3 of 11
OPTIONAL FEATURES			
Abbreviated Dialing Enhanced List?	y	Audible Message Waiting?	y
Access Security Gateway (ASG)?	n	Authorization Codes?	y
Analog Trunk Incoming Call ID?	y	CAS Branch?	n
A/D Grp/Sys List Dialing Start at 01?	y	CAS Main?	n
Answer Supervision by Call Classifier?	y	Change COR by FAC?	n
ARS?	y	Computer Telephony Adjunct Links?	y
ARS/AAR Partitioning?	y	Cvg Of Calls Redirected Off-net?	y
ARS/AAR Dialing without FAC?	y	DCS (Basic)?	y
ASAI Link Core Capabilities?	n	DCS Call Coverage?	y
ASAI Link Plus Capabilities?	n	DCS with Rerouting?	y
Async. Transfer Mode (ATM) PNC?	n	Digital Loss Plan Modification?	y
Async. Transfer Mode (ATM) Trunking?	n	DS1 MSP?	y
ATM WAN Spare Processor?	n	DS1 Echo Cancellation?	y
ATMS?	y		
Attendant Vectoring?	y		

5.1.2. Note procr IP Address for Avaya Aura® Application Enablement Services Connectivity

Display the procr IP address by using the command **display node-names ip** and noting the IP address for the **procr** and AES (**AES701678**).

display node-names ip		Page	1 of 2
IP NODE NAMES			
Name	IP Address		
SM100	10.10.40.34		
AES701678	10.10.16.78		
default	0.0.0.0		
g430	10.10.40.15		
procr	10.10.16.27		

5.1.3. Configure Transport Link for Avaya Aura® Application Enablement Services Connectivity

To administer the transport link to AES use the **change ip-services** command. On **Page 1** add an entry with the following values:

- **Service Type:** Should be set to **AESVCS**.
- **Enabled:** Set to **y**.
- **Local Node:** Set to the node name assigned for the **procr** in **Section 5.1.2**.
- **Local Port:** Retain the default value of **8765**.

change ip-services				Page	1 of 4
IP SERVICES					
Service Type	Enabled	Local Node	Local Port	Remote Node	Remote Port
AESVCS	y	procr	8765		

Go to **Page 4** of the **ip-services** form and enter the following values:

- **AE Services Server:** Name obtained from the AES server, in this case **AES701678**
- **Password:** Enter a password to be administered on the AES server.
- **Enabled:** Set to **y**.

Note: The password entered for **Password** field must match the password on the AES server in **Section 6.2**. The **AE Services Server** must match the administered name for the AES server; this is created as part of the AES installation, and can be obtained from the AES server by typing **uname -n** at the Linux command prompt.

change ip-services				Page 4 of 4
AE Services Administration				
Server ID	AE Services Server	Password	Enabled	Status
1:	AES701678	*****	y	idle
2:				
3:				

5.1.4. Configure CTI Link for TSAPI Service

Add a CTI link using the **add cti-link n** command. Enter an available extension number in the **Extension** field. Enter **ADJ-IP** in the **Type** field, and a descriptive name in the **Name** field. Default values may be used in the remaining fields.

add cti-link 1		Page 1 of 3	
CTI LINK			
CTI Link: 1			
Extension: 8279999			
Type: ADJ-IP			
		COR: 1	
Name: AESlink1			

5.2. Configure an Agent in Communication Manager

The Syntelate client requires an agent login on the Communication Manager. In this document it is assumed that an extension capable of allow and agent login has been configured already.

5.2.1. Add Hunt Group

To add a new skillset or hunt group type **add hunt-group x** where x is the new hunt group number. For example the hunt group **10** is added for the **POMSkill** queue. Ensure that **ACD**, **Queue** and **Vector** are all set to **y**. Also that **Group Type** is set to **ucd-mia**.

add hunt-group 10		Page 1 of 4
HUNT GROUP		
Group Number: 10	ACD? y	
Group Name: POMSkill	Queue? y	
Group Extension: 8273010	Vector? y	
Group Type: ucd-mia		
TN: 1		
COR: 1	MM Early Answer? n	
Security Code:	Local Agent Preference? n	
ISDN/SIP Caller Display:		
Queue Limit: unlimited		
Calls Warning Threshold:	Port:	
Time Warning Threshold:	Port:	

On **Page 2** ensure that **Skill** is set to **y** as shown below.

add hunt-group 920		Page 2 of 4
HUNT GROUP		
Skill? y	Expected Call Handling Time (sec): 180	
AAS? n		
Measured: none		
Supervisor Extension:		
Controlling Adjunct: none		
Multiple Call Handling: none		
Timed ACW Interval (sec):	After Xfer or Held Call Drops? n	

5.2.2. Add Agent

To add a new agent type **add agent-loginID x**, where x is the login id for the new agent.

add agent-loginID 8271001		Page 1 of 3
AGENT LOGINID		
Login ID: 8271001	AAS? n	
Name: Agent1	AUDIX? n	
TN: 1	Check skill TNs to match agent TN? n	
COR: 1		
Coverage Path:	LWC Reception: spe	
Security Code:	LWC Log External Calls? n	
	AUDIX Name for Messaging:	
	LoginID for ISDN/SIP Display? n	
	Password:	
	Password (enter again):	
	Auto Answer: station	
	MIA Across Skills: system	
	ACW Agent Considered Idle: system	
	Aux Work Reason Code Type: system	
	Logout Reason Code Type: system	
	Maximum time agent in ACW before logout (sec): system	
	Forced Agent Logout Time: :	
WARNING: Agent must log in again before changes take effect		

On **Page 2** add the required skills. Note that the skill **10** is added to this agent so as when a call for “CoBrowse” is initiated the call is routed correctly to this agent.

add agent-loginID 8271001										Page 2 of 3	
AGENT LOGINID											
Direct Agent Skill:						Service Objective? n					
Call Handling Preference: skill-level						Local Call Preference? n					
SN	RL	SL	SN	RL	SL	SN	RL	SL	SN	RL	SL
1: 10		1	16:			31:			46:		
2:			17:			32:			47:		
3:			18:			33:			48:		
4:			19:			34:			49:		
5:			20:			35:			50:		
6:			21:			36:			51:		
7:			22:			37:			52:		
8:			23:			38:			53:		
9:			24:			39:			54:		
10:			25:			40:			55:		
11:			26:			41:			56:		
12:			27:			42:			57:		
13:			28:			43:			58:		
14:			29:			44:			59:		
15:			30:			45:			60:		

5.3. Save Avaya Aura® Communication Manager Configuration

From the Command Line enter **Save Translation**, in order to commit the changes that have been introduced to memory on Communication Manager.

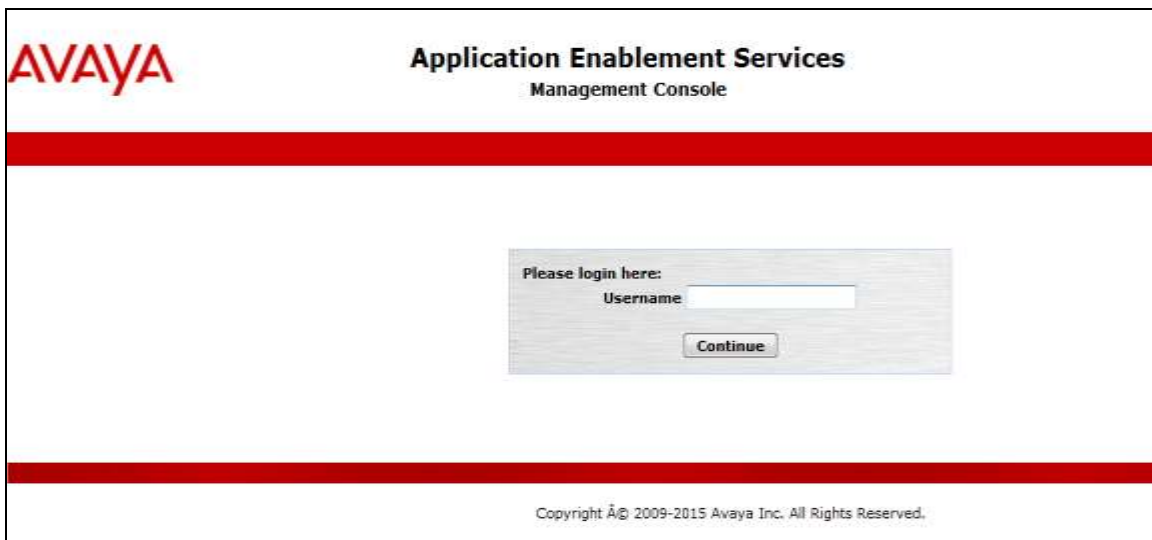
6. Configure Avaya Aura® Application Enablement Services Server

This section provides the procedures for configuring Application Enablement Services. The procedures fall into the following areas:

- Verify Licensing
- Create Switch Connection
- Administer TSAPI link
- Identify Tlinks
- Enable TSAPI & DMCC Ports
- Create CTI User
- Associate Devices with CTI User

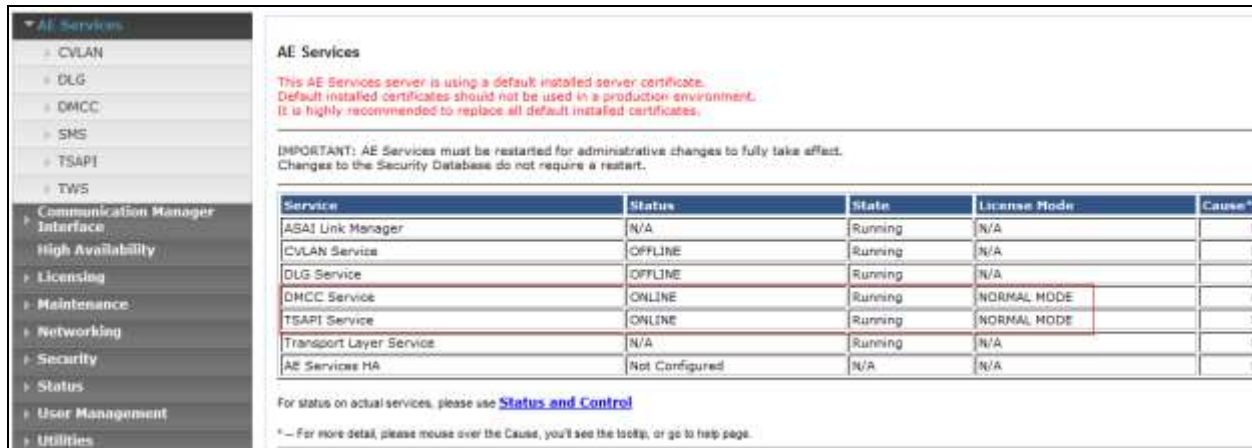
6.1. Verify Licensing

To access the AES Management Console, enter **https://<ip-addr>** as the URL in an Internet browser, where <ip-addr> is the IP address of AES. At the login screen displayed, log in with the appropriate credentials and then select the **Login** button.



The screenshot shows the Avaya Application Enablement Services Management Console login interface. At the top left is the Avaya logo. To its right, the text "Application Enablement Services" is displayed in a large, bold font, with "Management Console" in a smaller font below it. A thick red horizontal bar spans the width of the page. Below this bar, centered, is a login box with the text "Please login here:" followed by a "Username" label and a text input field. A "Continue" button is located below the input field. At the bottom of the page, another thick red horizontal bar is present, and below it, the copyright notice "Copyright © 2009-2015 Avaya Inc. All Rights Reserved." is displayed.

The Application Enablement Services Management Console appears displaying the **Welcome to OAM** screen (not shown). Select **AE Services** and verify that the TSAPI Service is licensed by ensuring that **TSAPI Service** is in the list of **Services** and that the **License Mode** is showing **NORMAL MODE**. If not, contact an Avaya support representative to acquire the proper license for your solution.



AE Services

This AE Services server is using a default installed server certificate. Default installed certificates should not be used in a production environment. It is highly recommended to replace all default installed certificates.

IMPORTANT: AE Services must be restarted for administrative changes to fully take effect. Changes to the Security Database do not require a restart.

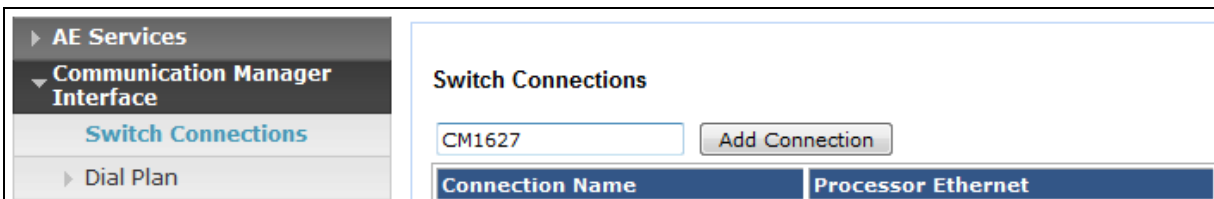
Service	Status	State	License Mode	Cause*
ASAI Link Manager	N/A	Running	N/A	
CVLAN Service	OFFLINE	Running	N/A	
DUG Service	OFFLINE	Running	N/A	
DMCC Service	ONLINE	Running	NORMAL MODE	
TSAPI Service	ONLINE	Running	NORMAL MODE	
Transport Layer Service	N/A	Running	N/A	
AE Services HA	Not Configured	N/A	N/A	

For status on actual services, please use [Status and Control](#)

* - For more detail, please mouse over the Cause, you'll see the tooltip, or go to help page.

6.2. Create Switch Connection

From the AES Management Console navigate to **Communication Manager Interface** → **Switch Connections** to set up a switch connection. Enter a name for the Switch Connection to be added and click the **Add Connection** button.



Switch Connections

CM1627

Connection Name	Processor Ethernet

In the resulting screen enter the **Switch Password**; the Switch Password must be the same as that entered into Communication Manager AE Services Administration screen via the **change ip-services** command, described in **Section 5.1.3**. The remaining fields were left as shown below. Click **Apply** to save changes.

From the **Switch Connections** screen, select the radio button for the recently added switch connection and select the **Edit PE/CLAN IPs** button. In the resulting screen, enter the IP address of the procr as shown in **Section 5.1.2** that will be used for the AES connection and select the **Add/Edit Name or IP** button.

6.3. Administer TSAPI link

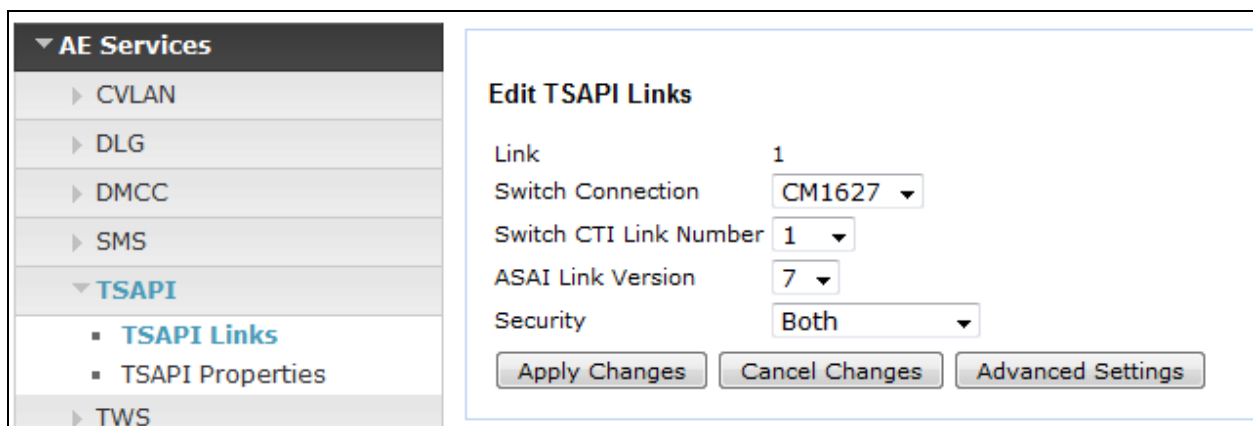
From the Application Enablement Services Management Console, select **AE Services** → **TSAPI** → **TSAPI Links**. Select **Add Link** button as shown in the screen below.



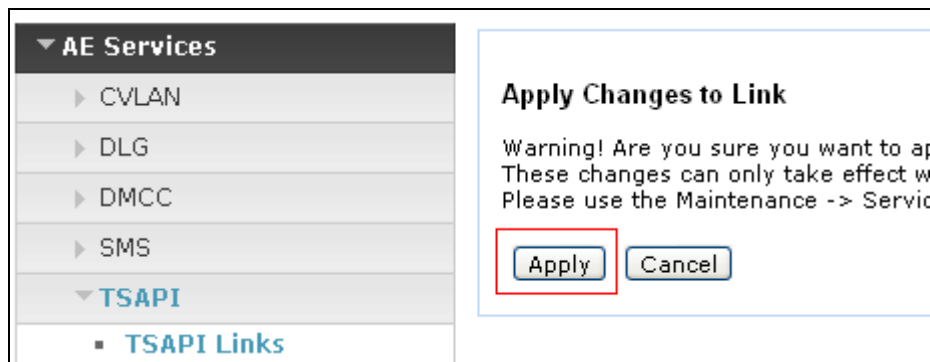
On the **Add TSAPI Links** screen (or the **Edit TSAPI Links** screen to edit a previously configured TSAPI Link as shown below), enter the following values:

- **Link:** Use the drop-down list to select an unused link number.
- **Switch Connection:** Choose the switch connection **CM1627**, which has already been configured in **Section 6.2** from the drop-down list.
- **Switch CTI Link Number:** Corresponding CTI link number configured in **Section 5.1.4** which is **1**.
- **ASAI Link Version:** This can be left at the default value of **7**
- **Security:** This was changed to **both** for compliance testing.

Once completed, select **Apply Changes**.



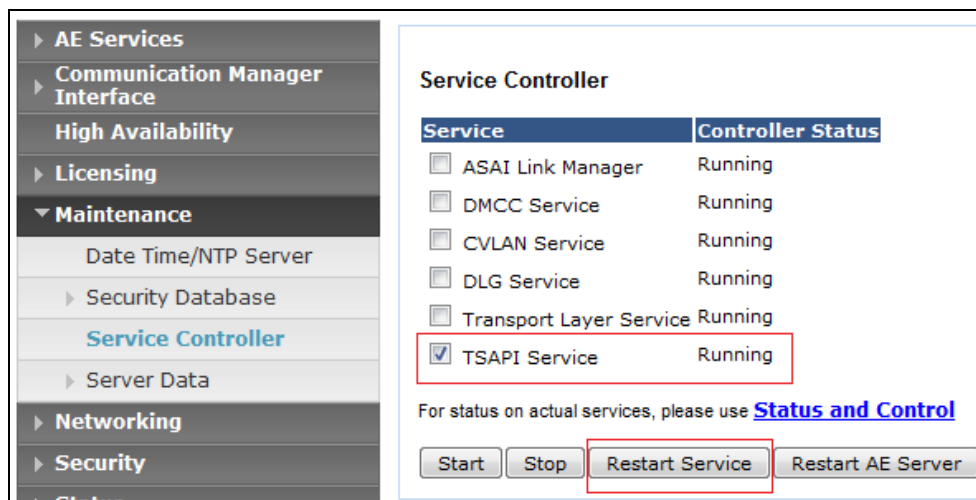
Another screen appears for confirmation of the changes made. Choose **Apply**.



When the TSAPI Link is completed, it resembles the screen below.



The TSAPI Service must be restarted to effect the changes made in this section. From the Management Console menu, navigate to **Maintenance** → **Service Controller**. On the Service Controller screen, tick the **TSAPI Service** and select **Restart Service**.



6.4. Identify Tlinks

Navigate to **Security** → **Security Database** → **Tlinks**. Verify the value of the **Tlink Name** for both.

The screenshot displays the Avaya system's configuration interface. On the left is a vertical navigation menu with the following items: AE Services, Communication Manager Interface, High Availability, Licensing, Maintenance, Networking, Security (expanded), Account Management, Audit, Certificate Management, Enterprise Directory, Host AA, PAM, Security Database (expanded), Control, CTI Users, Devices, Device Groups, and Tlinks (highlighted in blue). The main content area on the right is titled 'Tlinks'. It contains a 'Tlink Name' section with two radio button options: 'AVAYA#CM1627#CSTA#AES71678' (which is selected) and 'AVAYA#CM1627#CSTA-S#AES71678'. Below these options is a 'Delete Tlink' button.

6.5. Enable TSAPI and DMCC Ports

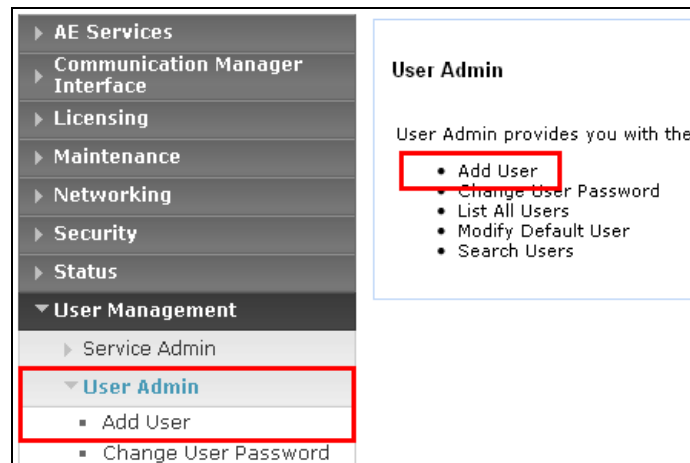
To ensure that TSAPI and DMCC ports are enabled, navigate to **Networking → Ports**. Ensure that the TSAPI ports are set to **Enabled** as shown below. Ensure that the **DMCC Server Ports** are also **Enabled** and take note of the **Unencrypted Port 4721** which will be used later in **Section 7.1**. Inisoft synTelate uses TSAPI functions, but it uses the TSAPI functions via a connection through the DMCC ports. This makes it possible not to install the TSAPI Client on the client computer.

The screenshot displays the 'Ports' configuration interface. On the left is a navigation menu with the following items: AE Services, Communication Manager Interface, High Availability, Licensing, Maintenance, Networking (expanded), AE Service IP (Local IP), Network Configure, Ports (highlighted with a red box), TCP Settings, Security, Status, User Management, Utilities, and Help. The main content area is titled 'Ports' and contains several sections:

- CVLAN Ports:** Includes 'Unencrypted TCP Port' (9999) and 'Encrypted TCP Port' (9998), each with 'Enabled' (selected) and 'Disabled' radio buttons.
- DLG Port:** Includes 'TCP Port' (5678).
- TSAPI Ports:** Includes 'TSAPI Service Port' (450) with 'Enabled' (selected) and 'Disabled' radio buttons (highlighted with a red box). Below this are 'Local TLINK Ports' with 'TCP Port Min' (1024) and 'TCP Port Max' (1039), and 'Unencrypted TLINK Ports' with 'TCP Port Min' (1050) and 'TCP Port Max' (1065). Further down are 'Encrypted TLINK Ports' with 'TCP Port Min' (1066) and 'TCP Port Max' (1081).
- DMCC Server Ports:** Includes 'Unencrypted Port' (4721), 'Encrypted Port' (4722), and 'TR/87 Port' (4723). Each has 'Enabled' (selected) and 'Disabled' radio buttons (highlighted with a red box). The 'Unencrypted Port 4721' field is also highlighted with a red box.

6.6. Create CTI User

A User ID and password needs to be configured for synTelate to communicate as a TSAPI client with the Application Enablement Services server. Navigate to the **User Management** → **User Admin** screen then choose the **Add User** option.



In the **Add User** screen shown below, enter the following values:

- **User Id** - This will be used by the synTelate setup in **Section 8.1**.
- **Common Name** and **Surname** - Descriptive names need to be entered.
- **User Password** and **Confirm Password** - This will be used with the **PrimaryAESLogin&Password** in **Section 8.1**.
- **CT User** - Select **Yes** from the drop-down menu.

The screenshot shows the 'Add User' form. On the left, the same sidebar as the previous image is visible, with 'User Admin' highlighted. The 'Add User' option is also highlighted. On the right, the 'Add User' page is displayed. It contains the following fields: * User Id (synTelate), * Common Name (Inisoft), * Surname (Syntelate), * User Password (masked with dots), * Confirm Password (masked with dots), Admin Note (text area), Avaya Role (None), Business Category (text area), Car License (text area), CM Home (text area), Css Home (text area), CT User (Yes), and Department Number (text area). A note at the top states: 'Fields marked with * can not be empty.'

Complete the process by choosing **Apply** at the bottom of the screen (not shown). The next screen will show a message indicating that the user was created successfully (not shown).

6.7. Change Security setting for CTI User

In the left window navigate to **Security → Security Database → CTI Users → List All Users**. From the main window select the **syntelate** user and click on **Edit**.

User ID	Common Name	Worktop Name	Device ID
<input type="radio"/> pomcti	POM	NONE	NONE
<input type="radio"/> presence	presence	NONE	NONE
<input checked="" type="radio"/> syntelate	syntelate	NONE	NONE
<input type="button" value="Edit"/> <input type="button" value="List All"/>			

Tick the box **Unrestricted Access** to allow this user access to all devices on Communication Manager. If this is not required then a list of devices to be allocated to this user will need to be setup and the procedure for achieving this can be found in the following document listed in **Section 11** *Avaya Aura® Application Enablement Services Administration and Maintenance Guide*. Click on **Apply Changes** to complete the setup.

Edit CTI User

User Profile:

User ID

Common Name

Worktop Name

Unrestricted Access

syntelate

syntelate

NONE ▼

☒

Call and Device Control:

Call Origination/Termination and Device Status

None ▼

Call and Device Monitoring:

Device Monitoring

Calls On A Device Monitoring

Call Monitoring

None ▼

None ▼

☐

Routing Control:

Allow Routing on Listed Devices

None ▼

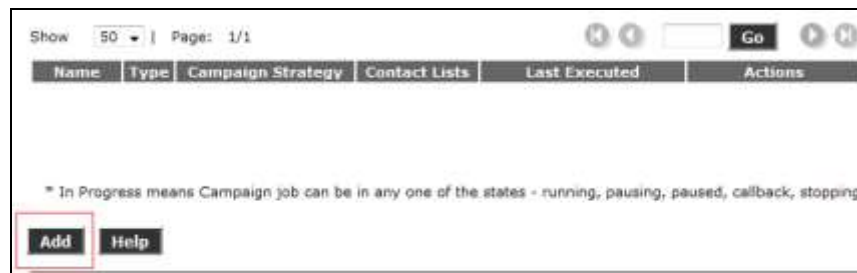
7. Configure Proactive Outreach Manager campaign

This section will describe the steps required to create a basic outbound campaign in POM.

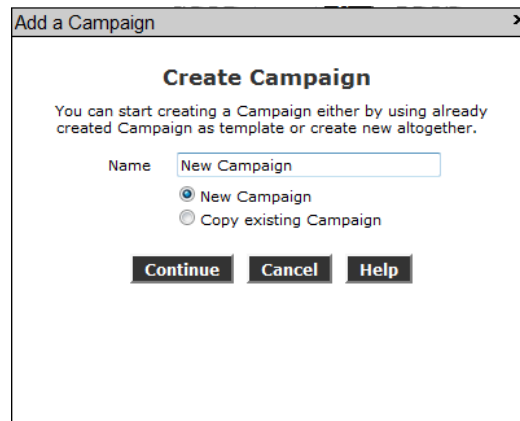
From the left hand menu select POM → POM Home. Under **Campaigns** select **Campaign Manager**.



In Campaign Manager click on **Add** to create the new campaign.

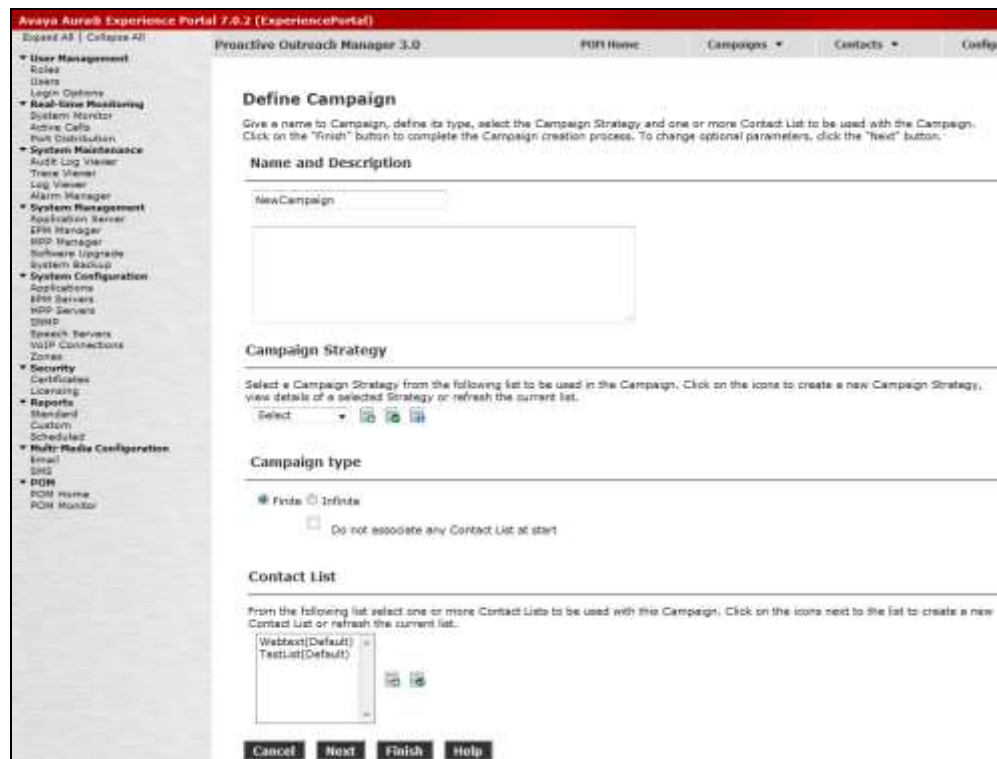


On the **Add a Campaign** screen, enter a name. Click on **Continue**.



The screenshot shows a dialog box titled "Add a Campaign" with a close button (X) in the top right corner. Inside the dialog, the heading "Create Campaign" is centered. Below it, a message states: "You can start creating a Campaign either by using already created Campaign as template or create new altogether." There is a text input field labeled "Name" containing the text "New Campaign". Below the input field are two radio buttons: "New Campaign" (which is selected) and "Copy existing Campaign". At the bottom of the dialog are three buttons: "Continue", "Cancel", and "Help".

The Campaign must now be defined and a **Campaign Strategy** and **Contact List** must be created.



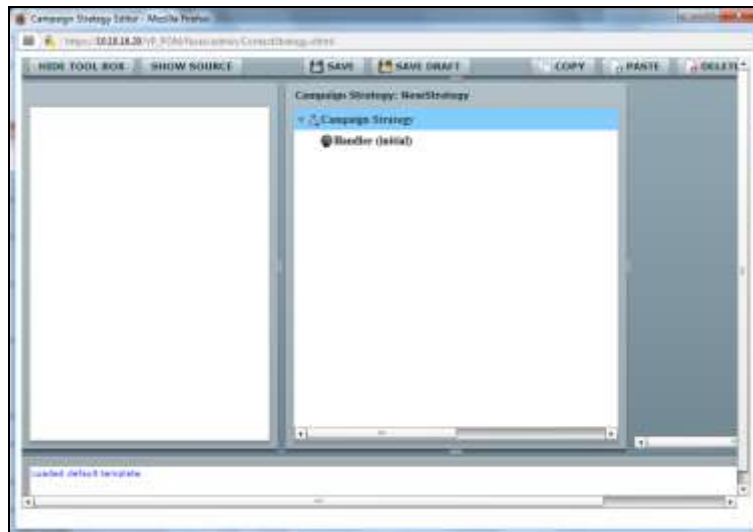
The screenshot shows the "Define Campaign" screen within the Avaya Aura Experience Portal 7.6.2. The left sidebar contains a navigation menu with categories like User Management, Real-time Monitoring, System Maintenance, System Management, System Configuration, Security, Reports, and Multi-Media Configuration. The main content area is titled "Define Campaign" and includes instructions: "Give a name to Campaign, define its type, select the Campaign Strategy and one or more Contact List to be used with the Campaign. Click on the 'Finish' button to complete the Campaign creation process. To change optional parameters, click the 'Next' button." The form is divided into sections: "Name and Description" with a text input field containing "NewCampaign"; "Campaign Strategy" with a "Select" dropdown and icons for creating or refreshing the list; "Campaign type" with radio buttons for "Finite" (selected) and "Infinite", and a checkbox for "Do not associate any Contact List at start"; and "Contact List" with a list box showing "Webtext(Default)" and "Textlist(Default)" and icons for creating or refreshing the list. At the bottom are buttons for "Cancel", "Next", "Finish", and "Help".

7.1. Create Campaign Strategy

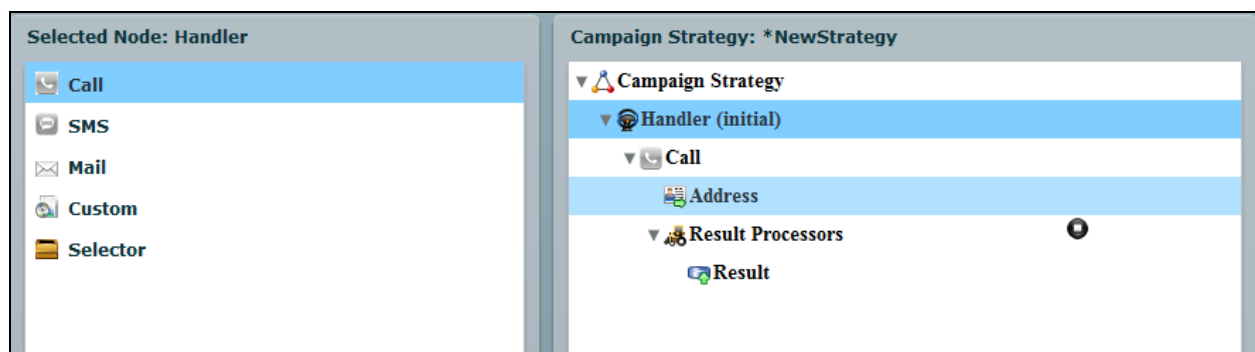
First under Campaign Strategy click on the add icon to bring up the Campaign Strategy Editor.

Campaign Strategy

Select a Campaign Strategy from the following list to be used in the Campaign. Click on the icons to create a new Campaign Strategy, view details of a selected Strategy or refresh the current list.



From the **Selected Node: Handler** box while Handler is selected under **Campaign Strategy**: drag and drop the **Call** node into the Campaign Strategy box



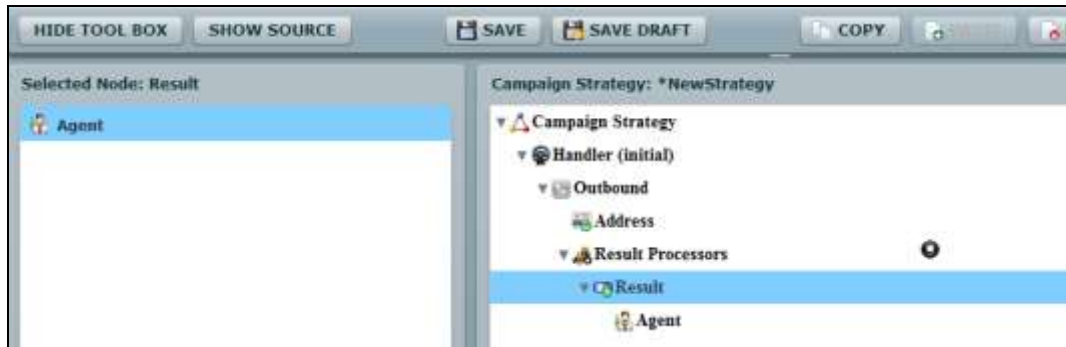
Select the **Call** node in the **Campaign Strategy:** Box and enter a name. This will change the name of the node in the **Campaign Strategy:** box. Select the **APPLICATIONS** from the drop down menus and set the **PACING PARAMETERS** (In this example a Preview Campaign has been selected).

Campaign Strategy: *NewStrategy

- ▼ Campaign Strategy
 - ▼ Handler (initial)
 - ▼ Outbound
 - Address
 - ▼ Result Processors
 - Result

Property	Value
Name	Outbound
Description	Outbound Calling
Sender's Display Name	synTelate
Sender's Address	
Timeout (sec)	
Guard Times	Disable
Min Contact Time	
Max Contact Time	
Re-check Interval (min)	
On Media Server Failure	
Enhanced CCA	ON
Priority	5
Allocation Type	Dynamic
APPLICATIONS	
Driver Application	PomDriverApp
Nailer Application	Nailer
Nuisance Call Application	AvayaPOMAnnouncement
On Hold Application	AvayaPOMAnnouncement
PACING PARAMETERS	
Call Pacing Type	Preview
Timed Preview	Yes
Preview Time (Sec)	
Can Cancel Preview	Disable
Min. Agents	1
Max. Agents	10
Agent Outbound Skill	POMOut
ACW Time (Sec)	10
# of ACW extensions	
Default Completion code	NoReply

From the **Campaign Strategy:** box select **Result (Call Answered)** and from the Selected Node: box drag the **Agent** node into the Campaign Strategy box.



Select the **Agent** node in the **Campaign Strategy** box. Enter a **Name** and select an **Agent Script** from the drop down.

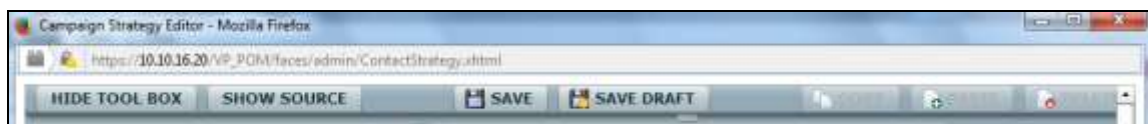
Campaign Strategy: *Syntelate

- ▼ Campaign Strategy
 - ▼ Handler (initial)
 - ▼ Initial
 - Address
 - ▼ Result Processors
 - ▼ Result (Call Answered)
 - Agents

Property	Value
Name	Agents
Description	
Agent Script	Syntelate
CALLBACK PARAMETERS	
Preferred Agent Call back	Enable
Campaign Call back	Enable
General Call back	Enable
Can Cancel Callback	Enable
Nailing Call Timeout(sec)	

[Edit Description](#)

Then click **Save** when complete. A confirmation message will be displayed in the bottom left corner (not shown) and the Campaign Strategy Editor window can be closed.

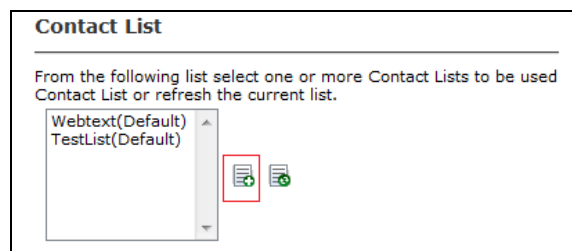


7.2. Create Contacts list

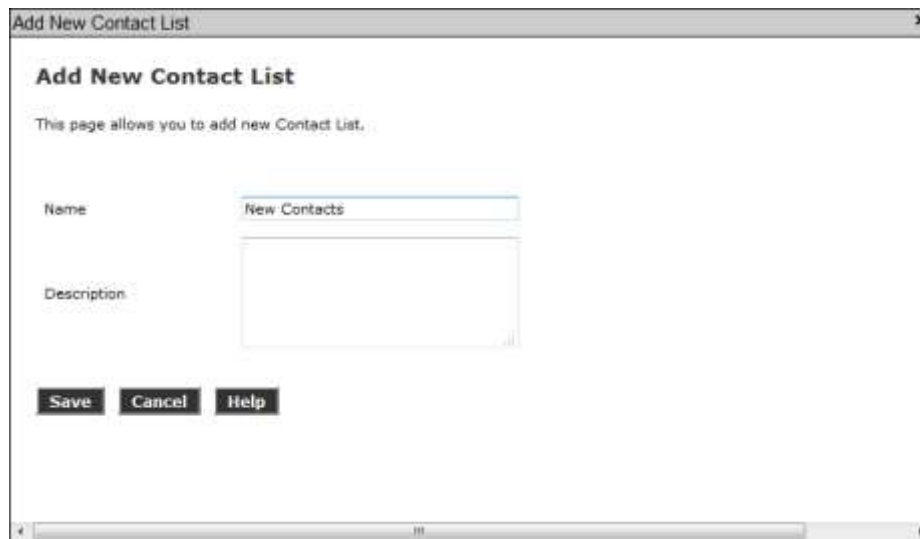
Before creating the Contacts list for the campaign a list of contact must be created as a comma delimited .csv file in the following format. For simple SMS messages no further information is required.

```
id,firstname,lastname,phonenumber2,phonenumber1,email
1,Contact,One, 12125550100, 12125550100,contact1@avaya.com
2,Mobile,One, 12125550101, 12125550101,mobile1@inisoft.com
3,Bob,Dylan, 12125550102, 12125550102,bobby@hotmail.com
4,SMS,One, 12125550103, 12125550103,SMS@avaya.com
```

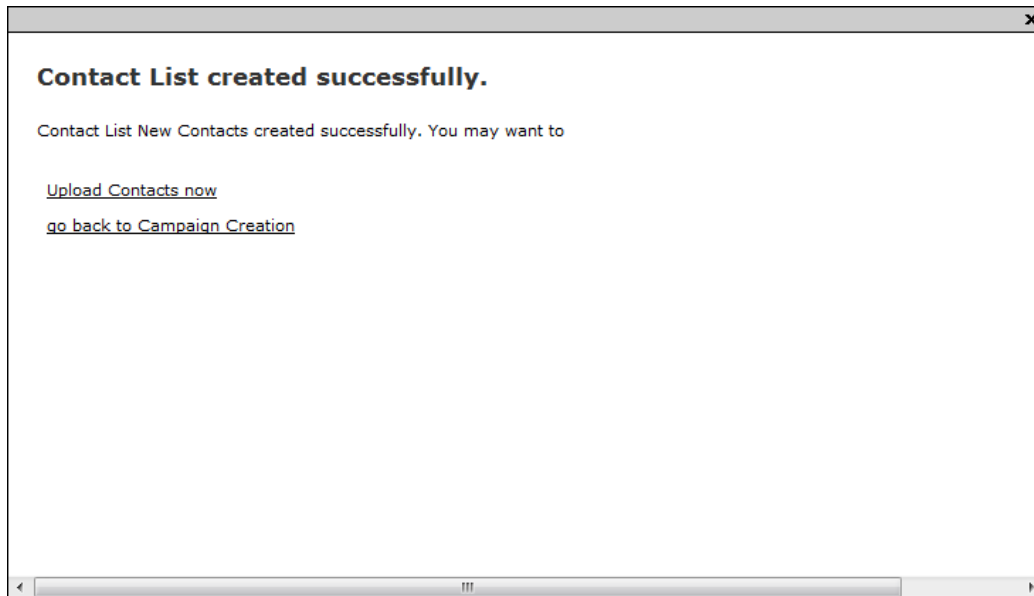
From the Define Campaign (not shown) screen under **Contact List** click on the add icon.



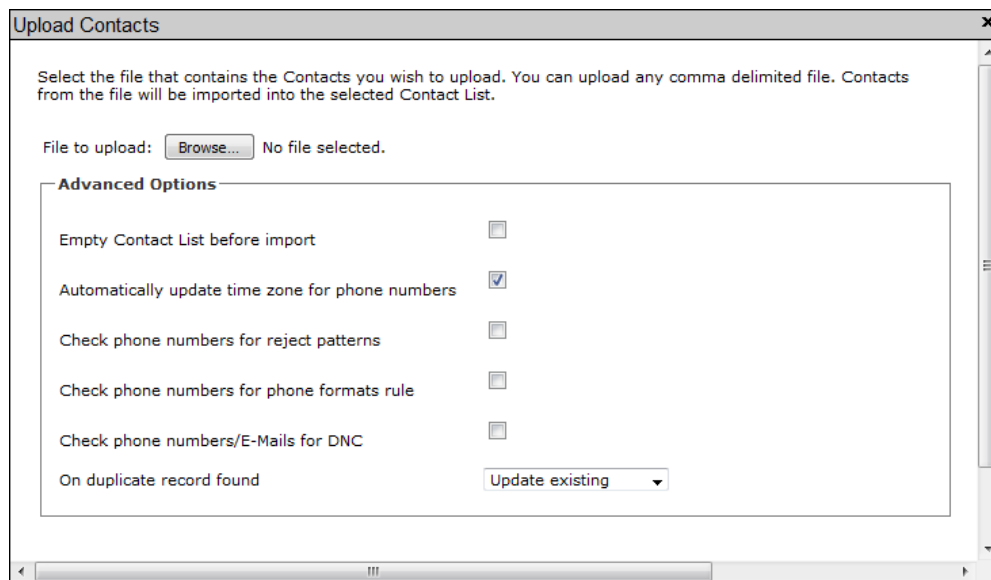
Give the Contacts list a **Name** and click on Save.



Now upload the contacts in the .csv file created. Click on **Upload Contacts now**.



Click on **File to upload** and select the .csv file created. Select **Automatically update time zone for phone numbers**. Click on Continue to upload the contacts and go back to the Define Campaign screen.



7.3. Complete the Campaign Creation

In this section the campaign creation is completed. Only screens where changes need to be made are mentioned, otherwise just clicking **Next** to move to the next screen is sufficient.

On the **Media Servers and Media Specific Parameters** Screen check that the EPM Zone is selected and then Click **Next**.

Proactive Outreach Manager 3.0 POM Home Campaigns Contacts Configur

Media Servers and Media Specific Parameters (optional)

Select the media servers to be used for this Campaign and perform media specific configurations. Media used by a Campaign is determined by the Campaign Strategy selected in the earlier step.

Voice and Video

By default, Campaign uses all the Experience Portal Management Servers configured to make outbound calls. If you want specific EPM Servers to be used for this Campaign, you can select specific servers from the following list.

Zone Name Default

EPM

SMS prefix

Cancel Previous Next Finish Help

On **The Completion Code Association** screen move all **Available** Completion Codes to **Selected**. Click **Next** to continue.

Proactive Outreach Manager 3.0 POM Home Campaigns Contacts Configur

Completion Code Association (optional)

This section allows you to associate custom Completion Codes with a Campaign. Completion Codes selected here can be used in subsequent steps of this wizard to define Finish Criteria.

Completion Codes

Available list shows all the Completion Codes defined. Current Completion Codes associated with the Campaign are shown in the selected Completion Codes list. You can move the items between list of available and currently selected Completion Codes by using Move, Move All, Remove and Remove All.

Available Selected

Success
NoReply
SMS Reply

Move
Move All
Remove
Remove All

Cancel Previous Next Finish Help

Finally on **Processing Parameters** click **Finish** to save the campaign.

Processing Parameters (optional)

Define actions to be taken after a Campaign is finished or stopped and miscellaneous Campaign processing parameters.

Export Data

Export Contacts on completion ☐

Custom Post Processing

Enter the fully resolved class Name (e.g com.avaya.pom.custom.myPostProcessor) implementing the custom post processing interface.

Campaign post processor class

Miscellaneous

Batch size decides the number of records that Campaign Manager will fetch from database for processing in a single batch.

Batch size

Cancel **Previous** **Finish** **Help**

8. Configure synTelate Designer

This section provides the procedures for configuring synTelate Designer. The procedures include the following areas:

- Administer Moagent32.ini
- Launch Designer
- Administer campaigns
- Administer scripts and screens
- Administer CTI

8.1. Administer Moagent32.ini

From the PC running Designer, navigate to the **C:\WINDOWS\system32** directory to locate the **Moagent32.ini** file, amend this file as shown below.

```
[logon]
servername = 10.10.16.90
[ConfigSettings]
UseDlIDbs=0
```

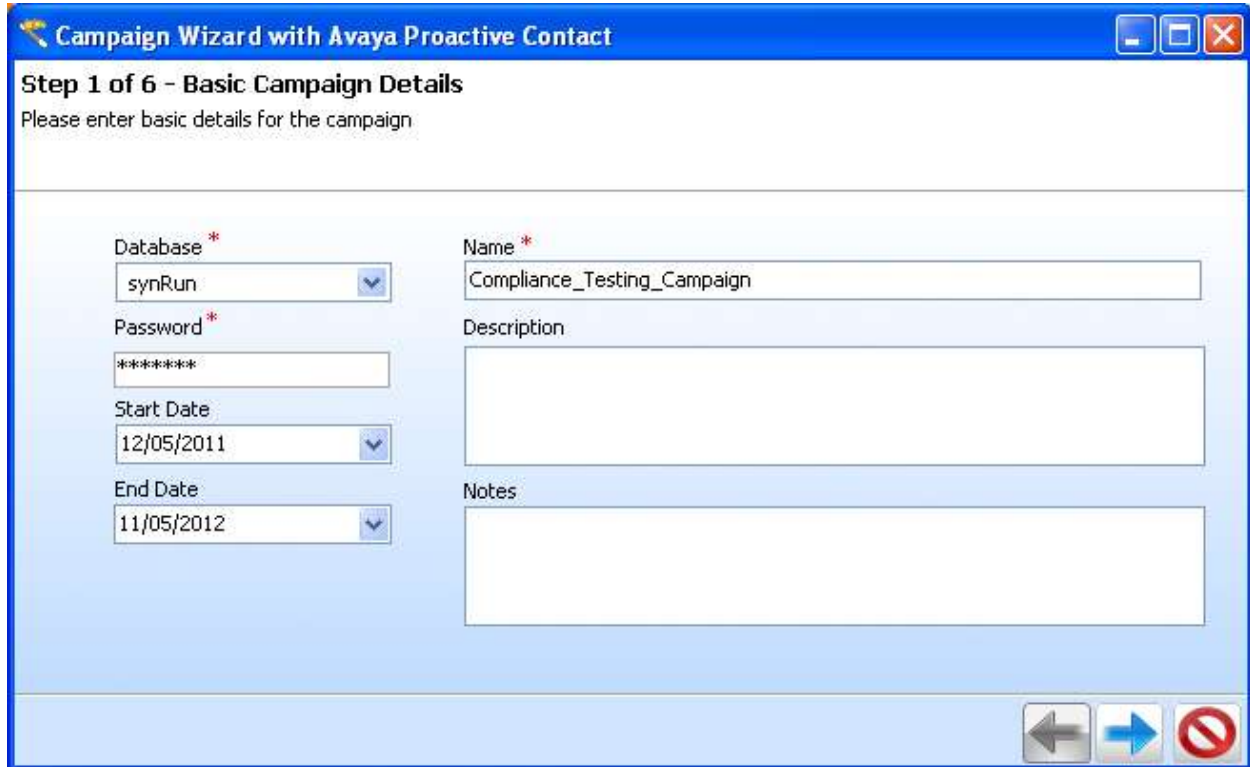
8.2. Launch Designer

From the PC running Designer, select **Start → Programs → synTelate → synTelate Designer** to display the **Welcome - synTelate** screen. Select the **Designer** tab. From the top menu, select the **Home** tab. Click **New** and select **Wizard → Dialler Wizard** from the drop-down list (not shown below) to create a new campaign.



8.3. Administer campaigns

The **Step 1 of 6** screen is displayed. Enter the following values shown, and retain the default values for the remaining fields.



The screenshot shows a window titled "Campaign Wizard with Avaya Proactive Contact". The subtitle is "Step 1 of 6 - Basic Campaign Details". Below the subtitle is the instruction "Please enter basic details for the campaign". The form contains several fields:

- Database ***: A dropdown menu with "synRun" selected.
- Password ***: A text field containing "*****".
- Start Date**: A date picker showing "12/05/2011".
- End Date**: A date picker showing "11/05/2012".
- Name ***: A text field containing "Compliance_Testing_Campaign".
- Description**: A large empty text area.
- Notes**: A large empty text area.

At the bottom right of the window are three buttons: a left arrow, a right arrow, and a red circle with a slash.

Click on the arrow pointing **right**, the **Avaya PCS Login** screen is displayed. Enter the credentials for the Proactive Contact supervisor and click on the green tick.



The screenshot shows a window titled "Avaya PCS Login". It contains two text fields:

- Agent Name**: A text field containing "sysadm".
- Password**: A text field containing "*****".

At the bottom right of the window are two buttons: a green checkmark and a red circle with a slash.

The **Step 2 of 6** screen is displayed. Select the proper values for **Call List** and **Job Name**. Retain the default value for **Client Status Table**, and select the proper **Job Type**. Proceed to **Step 3**.

The screenshot shows the 'Step 2 of 6 - Choose Data Source' screen of the 'Campaign Wizard with Avaya Proactive Contact'. The window title is 'Campaign Wizard with Avaya Proactive Contact'. The subtitle is 'Step 2 of 6 - Choose Data Source'. Below the subtitle is the instruction 'Please specify the data source for the campaign'. The form contains several fields: 'Call List' with a dropdown menu showing 'list2'; 'Job Name' with a dropdown menu showing 'outbnd2' and a button with three dots; 'Client Status Table' with a dropdown menu showing 'outbnd2'; 'Job Type' with two radio buttons, 'Inbound' and 'Outbound', where 'Outbound' is selected; 'Incoming DDI' with a text box and a button with three dots; and 'Additional Jobs' with a large empty text area. At the bottom right are three navigation buttons: a left arrow, a right arrow, and a red circle with a slash.

The **Step 3 of 6** screen is displayed, complete as shown and proceed to **Step 4**.

The screenshot shows the 'Step 3 of 6 - Database Behaviour' screen of the 'Campaign Wizard with Avaya Proactive Contact'. The window title is 'Campaign Wizard with Avaya Proactive Contact'. The subtitle is 'Step 3 of 6 - Database Behaviour'. Below the subtitle is the instruction 'Please specify the desired behaviour of the Client Status Table record in the database when a call is popped.'. The form contains a 'Client Record' section with two options: 'Create New' with a radio button and 'Save To Database' with a checked checkbox and a button with three dots. Below 'Create New' is the text 'Create a new record in the Client Status Table for each PCS call'. Below 'Save To Database' is a text box. The second option is 'Match Existing On Field' with a radio button and a dropdown menu. Below it is the text 'Display an existing record in the Client Status Table for each PCS Call'. At the bottom right are three navigation buttons: a left arrow, a right arrow, and a red circle with a slash.

The **Step 4 of 6** screen is displayed.

Campaign Wizard with Avaya Proactive Contact

Step 4 of 6 - Dialer Field Mappings

Please specify which fields from the dialer will be mapped to fields in the Client Status Table.

Available Fields		Selected Fields
ACCTNUM BALANCE CITY COMMENT1 FINOPER FRTHDATE1 FRTHTIME1 NAME NAME1 NAME2 PHONE1 PHONE2 STATE SVJCODE TOTALDUE ZIPCODE	> >> < <<	

Navigation buttons: < > <> <<>>

Click on the double arrow highlighted below to select all fields and proceed to **Step 5**.

Campaign Wizard with Avaya Proactive Contact

Step 4 of 6 - Dialer Field Mappings

Please specify which fields from the dialer will be mapped to fields in the Client Status Table.

Available Fields		Selected Fields
	> >> < <<	ACCTNUM BALANCE CITY COMMENT1 FINOPER FRTHDATE1 FRTHTIME1 NAME NAME1 NAME2 PHONE1 PHONE2 STATE SVJCODE TOTALDUE ZIPCODE

Navigation buttons: < > <> <<>>

The **Step 5 of 6** screen is displayed, amend as required and proceed to **Step 6**.

Campaign Wizard with Avaya Proactive Contact

Step 5 of 6 - outbnd2 - Fields
Please check the data types and lengths and edit where required. Add any additional fields where necessary.

Field Name	Call List Field	Type	Length	Decimals	Exists	Modified	Delete
ACCTNUM	ACCTNUM	varchar	25	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BALANCE	BALANCE	numeric	20	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CITY	CITY	varchar	25	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
COMMENT1	COMMENT1	varchar	60	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FINOPER	FINOPER	varchar	8	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FRTHDATE1	FRTHDATE1	datetime	10	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FRTHTIME1	FRTHTIME1	datetime	10	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NAME	NAME	varchar	20	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NAME1	NAME1	varchar	25	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Buttons: + (Add), - (Delete), [Disk with Checkmark] (Save)

Navigation: [Previous], [Next], [Cancel]

The **Step 6 of 6** screen is displayed, this confirms your settings. Click on the Door icon highlighted to complete the Wizard.

Campaign Wizard with Avaya Proactive Contact

Step 6 of 6 - Summary
Please ensure all details are correct. To alter details, navigate to the respective page.

Tabs: Campaign Details | Data Source | Database Behaviour | Additional Jobs

Database: synRun

Name: Compliance_Testing_Campaign CPGNo: 88

Description: [Text Area]

Notes: [Text Area]

Start Date: 12/05/2011 End Date: 11/05/2012

Open Campaign Desktop: ☐

Navigation: [Previous], [Door (Red Box)], [Cancel]

8.4. Administer scripts and screens

For the purposes of this compliance test, it is assumed that scripts and screens are created according to requirements. A sample screen is shown below:

Running - synTelate

Home

Cut Copy Paste Delete Undo Zoom Dialer Utility Dial / Answer / Complete Preview Hangup Hold / Retrieve Ready Redirect Call Save New Delete

Good Afternoon

JOHN DOE

JOHN DOE

Compliance Outbound 2 Test

AcctNum 5300292120906630

Name JOHN DOE JOHN DOE

Address 7401

Phone 1 2032323423

Phone 2 0000000000

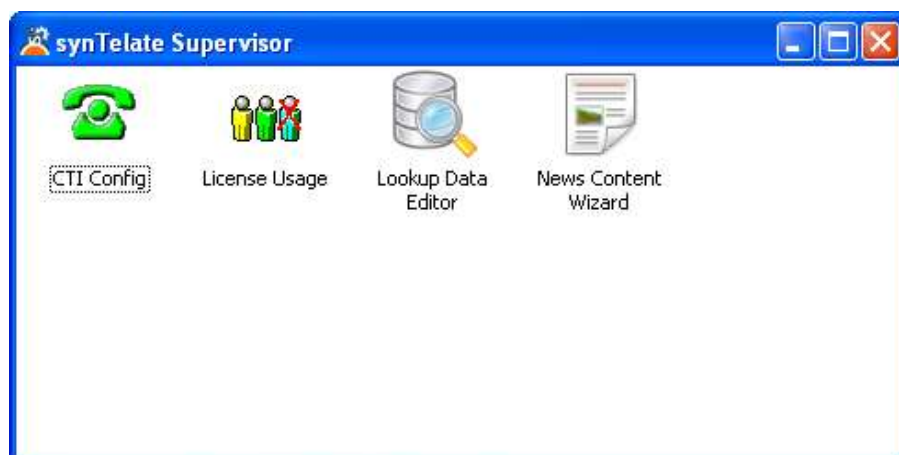
Comments

Complete Call (21) Set Recall

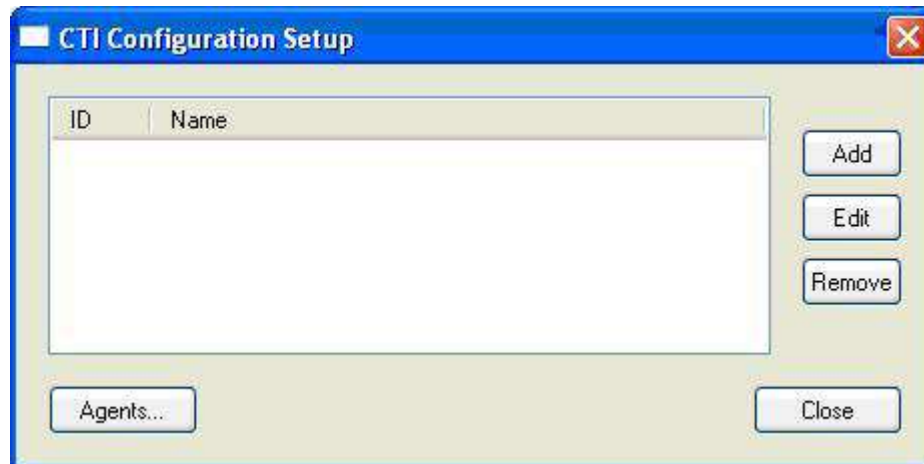
OUTBOUND - Home phone - 2032323423 Ready synTelate Server - Not Required

8.5. Administer CTI

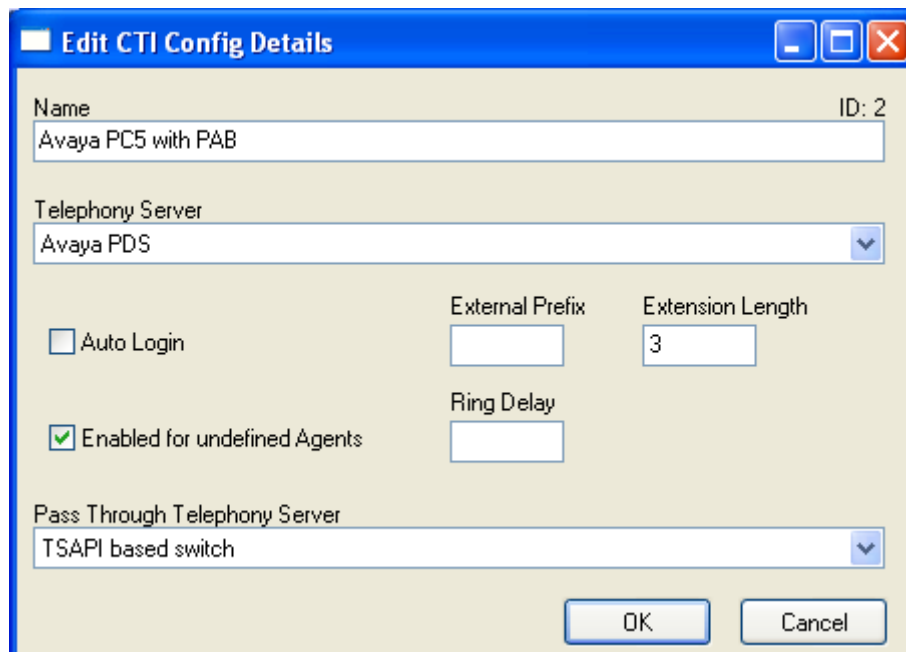
Open Select the **Supervisor** tab in synTelate Designer



Click on **CTI Config**. Click **Add**.



The **Edit CTI Config Details** screen is displayed. Complete as shown below.

The image shows a Windows-style dialog box titled "Edit CTI Config Details". It has a blue title bar with standard window controls (minimize, maximize, close). The form contains the following fields and controls:

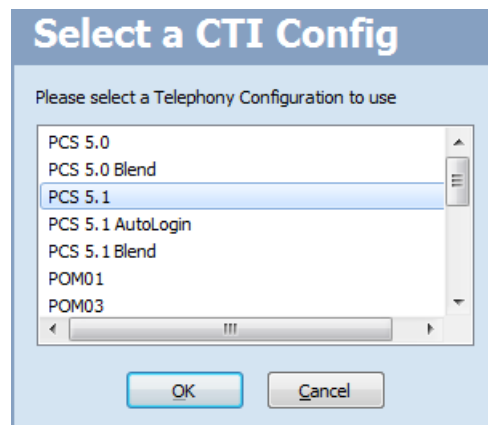
- Name**: A text box containing "Avaya PC5 with PAB". To its right, the text "ID: 2" is displayed.
- Telephony Server**: A dropdown menu showing "Avaya PDS".
- Auto Login**: An unchecked checkbox.
- External Prefix**: A text box.
- Extension Length**: A text box containing the value "3".
- Enabled for undefined Agents**: A checked checkbox.
- Ring Delay**: A text box.
- Pass Through Telephony Server**: A dropdown menu showing "TSAPI based switch".
- At the bottom right are two buttons: "OK" and "Cancel".

9. Verification Steps

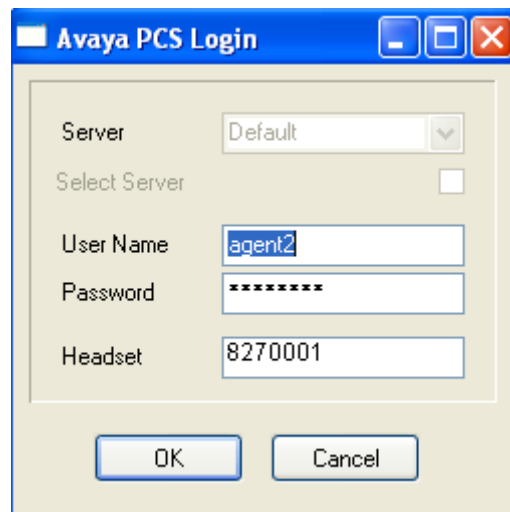
This section provides the tests that can be performed to verify proper configuration of synTelate, Proactive Outreach Manager, and Application Enablement Services. Prior to verification, start an outbound campaign on Proactive Outreach Manager.

9.1. Verify synTelate

From the PC running synTelate Agent, select **Start → Programs → synTelate → synTelate Agent**. The **Select a CTI Config** screen is displayed next. Select the CTI from **Section 8.5**, as shown below.



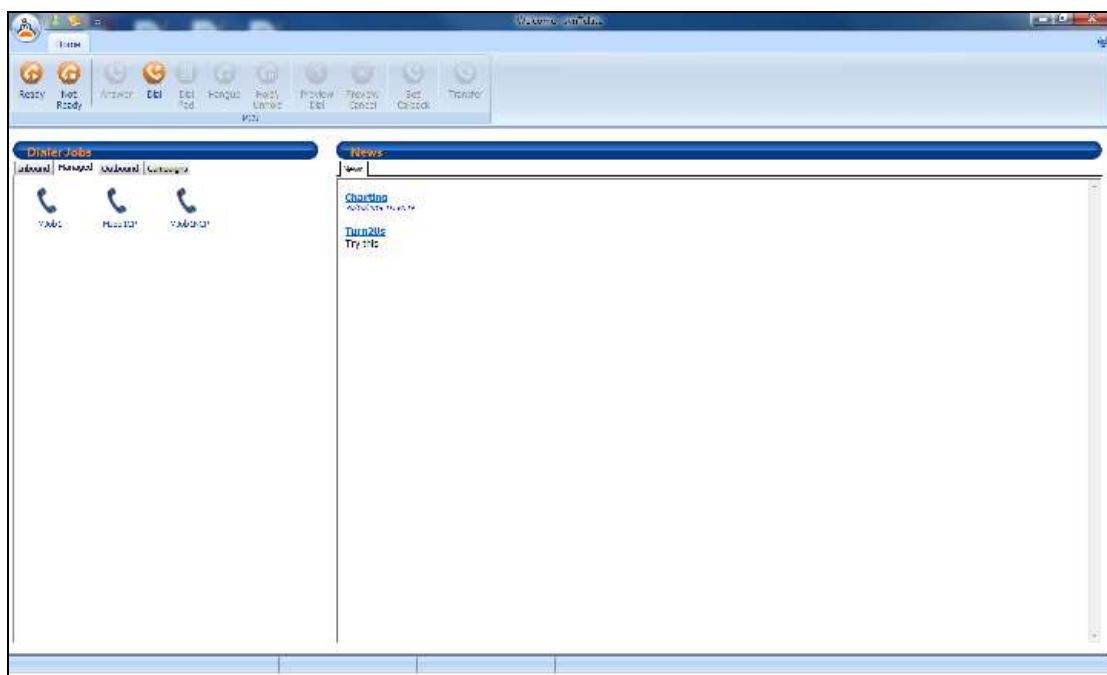
The **Avaya PCS Login** screen is displayed. Enter the pre-defined agent login and password for Proactive Contact, and the agent station/headset number detailed above.



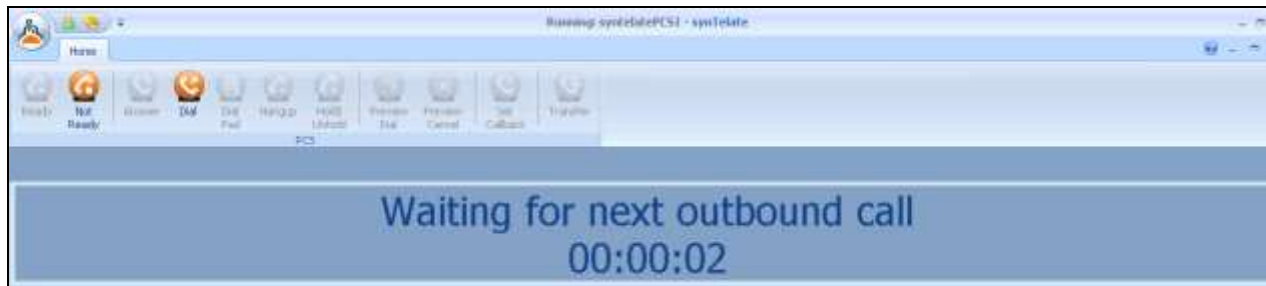
The synTelate splashscreen is shown:



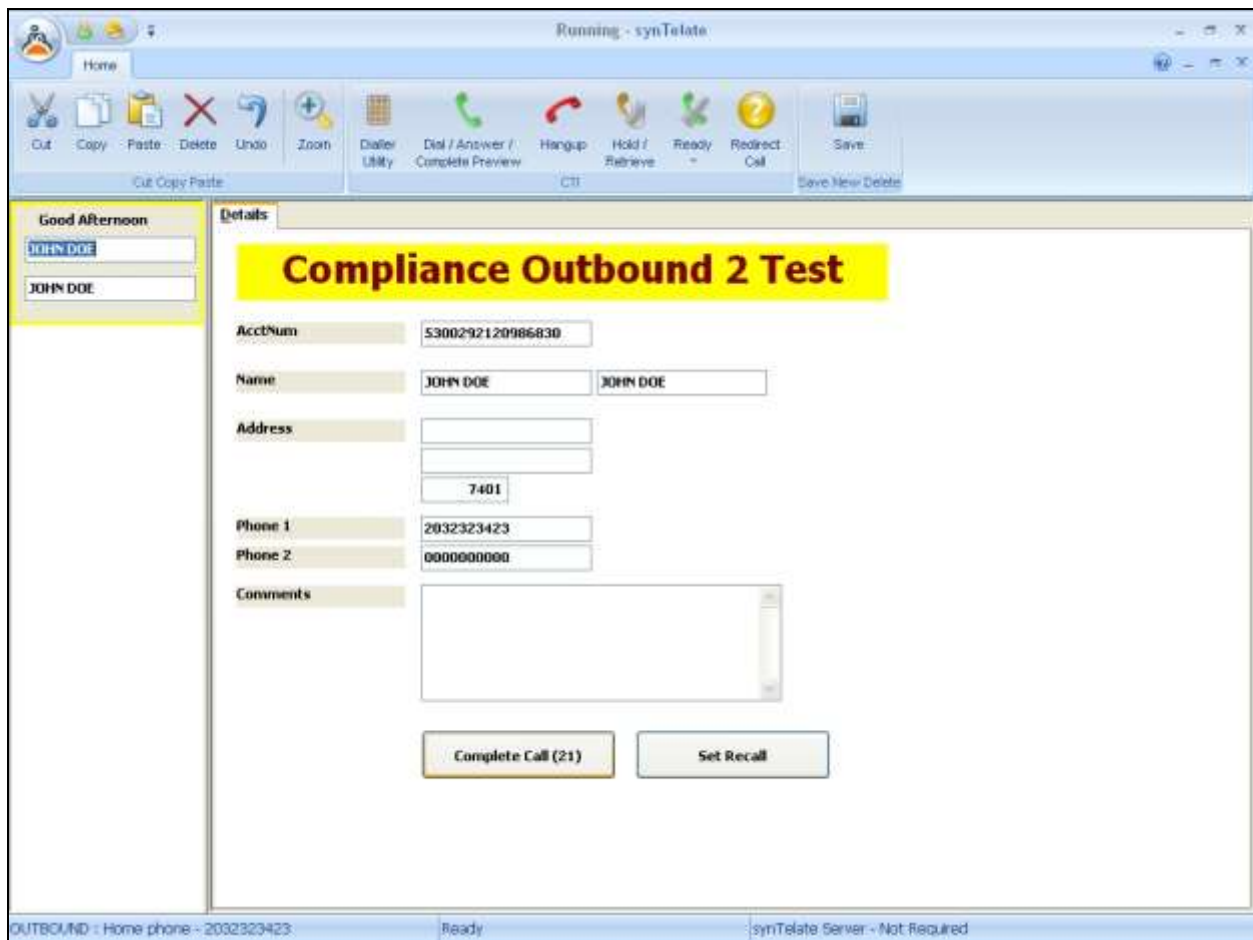
synTelate opens with welcome screen showing list of available jobs, Verify the active outbound job is displayed. Click **outbnd2**.



The **Dialler Status** box is displayed. Verify the values for **Status** and **Job**, as shown below.



The **Running - synTelate** screen is displayed. When an outbound call is delivered to the agent, verify that the appropriate data screen from **Section 8.4** is displayed and populated with values retrieved from the customer record, as shown below:



9.2. Verify Avaya Proactive Outreach Manager

From POM Monitor Select the Active Campaign. At the bottom of the screen select the Active Agents tab (not shown) to bring up the Active Agent screen. The screen below shows the synTelate agent logged into the active campaign and **BUSY** on a call.

Avaya Aura® Experience Portal 7.1.0 (ExperiencePortal)

Proactive Outreach Manager 3.0

POP Home: Campaigns Contacts Configurations

Active Campaigns

Campaign Name	Campaign Type	Job ID	Status
SynTelate	infinite	53	Running

Active Agents

Agent Filter -- Total: 1

Agent	Agent Extension	Agent Name	Skills	Agent State
0371001	0370001	Agent 0371001	10,1	BUSY

9.3. Verify Avaya Aura® Application Enablement Services

On AE Services, verify the status of the TSAPI link by selecting **Status → Status and Control → TSAPI Service Summary** from the left pane. The **TSAPI Link Details** screen is displayed. Verify the **Status** is **Talking** for the TSAPI link administered in **Section 6.4**, as shown below.

The screenshot shows the Avaya Application Enablement Services Management Console. The left navigation pane includes sections like 'All Services', 'Communication Manager Interface', 'Licensing', 'Maintenance', 'Networking', 'Security', and 'Status'. The 'Status' section is expanded, showing 'Alarm Viewer', 'Logs', and 'Status and Control'. Under 'Status and Control', 'TSAPI Service Summary' is selected. The main content area displays 'TSAPI Link Details' with a table of links. The first link has a status of 'Talking'.

Link	Switch Name	Switch CTI Link ID	Status	Since	State	Switch Version	Associations	Mega to Switch	Mega from Switch	Mega Period
1	CM	1	Talking	Thu Jun 2 10:17:49 2011	Online	16	9	15	15	30

10. Conclusion

These Application Notes describe the configuration steps required for synTelate to successfully interoperate with Avaya Proactive Outreach manager with CTI using outbound voice campaigns. All feature test cases were completed, with observations noted in **Section 2.2**.

11. Additional References

This section references the product documentation relevant to these Application Notes.

- [1] *Administering Avaya Aura® Communication Manager*, Document ID 03-300509
- [2] *Avaya Aura® Communication Manager Feature Description and Implementation*, Document ID 555-245-205
- [3] *Avaya Aura® Application Enablement Services Administration and Maintenance Guide Release 7.0*
- [4] *Avaya Aura® Experience Portal 7.1 Overview and Specification*
 - a. *Deploying Avaya Aura® Experience Portal 7.1 in an Avaya Customer Experience Virtualized Environment*
- [5] *Proactive Outreach Manager 3.0.3 Overview and Specification*
- [6] *Implementing Proactive Outreach Manager 3.0.3*

1. synTelate v5.1 Training Manual 2015 Issue 01.doc

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