



# Predial Solution Demo Scripts

## Step 0: First-time setup

*This step only needs to do once if you haven't installed Primas Web Notifier and Softphones yet.*


### Step 0.1: Install Primas Web Notifier (Chrome Extension)



Web Notifier helps to show screen pop to the agent. The extension only supports Google Chrome or MS Edge web browser

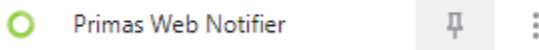
- If you use Chrome:
  - [Click here](#), it will open a new tab. In the new tab, click  to install the extension.
- If you use MS Edge (Chromium):
  - Open a new browser tab, enter <edge://extensions> in the address bar to open the Edge extension page, and make sure the option **Allow extensions from the other stores** at the bottom-left of the page is on.
  - [Click here](#), it will open a new tab. In the new tab click  to install the extension.

### Step 0.2: Configure Primas Web Notifier

#### Optional step: Pin the Primas Web Notifier icon

After installing the Primas Web Notifier, you should see this icon  at the top-right of the web browser. If you don't see this icon, you can click

on the icon  at the top-right corner of the web browser, find the Primas Web Notifier, click the icon  on the



It will pin the Primas Web Notifier extension to the browser toolbar so that you can find the extension easier.

## Step 1: Prepare for the agent role

### Option 1: Login to Agent Dashboard and Web Notifier automatically

[Click here](#) and wait until it shows you the Agent Dashboard page.

### Step 2: Demo

#### Demo Predial function

1. Login to <https://predial.primas.net>
  - a. **User name:** [ddo@primas.net](mailto:ddo@primas.net)
  - b. **Password:** **A@z200711**
2. Click on the name of **"Demo Contact Center for Predial"**
3. A pop-up shows the predial plan detail.
4. Click **"Start predial"** button
5. Wait for the system to transfer the call to an agent.
6. The call routed to an agent on **40203**, the Web Notifier will show a popup to the OD Online system.
7. Login to OD Online to view the insurance contact list.
  - a. User name: [staff@odonline.net](mailto:staff@odonline.net)
  - b. Password: **staffdemo**

#### Demo Learning function

1. Go to the [Predial home page](#)
2. Click **"Create New"** button, it shows a "Create Predial Plan" popup
3. Enter the information below:
  - a. **Predial Plan Name:** your girlfriend's name
  - b. **Call Center Number:** the number that the system will call to. If you want to test with the fake IVR, enter 800-134-2285
  - c. **Learning Number** (should be your phone number)
  - d. **Transfer to** (agent VDN): enter **20016**
  - e. Turn on the **"Active"** checkbox
  - f. Click the **"Create"** button, it will close the pop-up and go back the previous page

4. Click on the name of the new item you just created.
5. A pop-up shows the predial plan detail.
6. Click "**Call to Learn**" button
7. Wait for the system to transfer the call to your phone number.
8. Listen to the IVR and press the requested keys.
9. After finishing the interaction with the IVR, click the "**Update**" button to update