Omnichannel Cloud Solutions
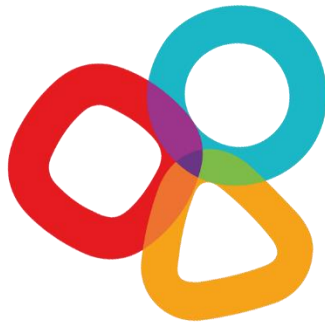
HERMES.NET V5
Documentation

Agent Administration

AGENT & SUPERVISOR ACCOUNTS

User Manual

Product	Hermes.Net	Version Document	1.0
Category	User Manuel	Date Version	September 2017
Version	5.5	Approbation	Product Manager

CONCERNING THIS DOCUMENT

This document provides a description of the **Vocalcom Agent configuration tool**.

Our teams will be delighted to bring you their advice and expertise if you feel the need. Do not hesitate to contact us. We will gladly guide and assist you to fulfill all your needs.

AUDIENCE

This document is aimed at people who use and set up **Agent configuration** at an operational level.

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REVISIONS HISTORY

Document version	Date	Revision Description
0.1	02-28-2017	First Version by TW
0.2	06-08-2017	Content & template update by TW
0.3	08-24-2017	Content update after JCO review
1.0	09-22-2017	Validated version

REFERENCE DOCUMENT

Document version	Date	Revision Description
Hermes.Net V5		
Manager Dashboard		

TABLE OF CONTENT

1. WHAT IS THIS DOCUMENT ?

The aim of this document is to explain how to create and install step by step the common features of a campaign on Hermes Net, with screenshots and shorts instructions.
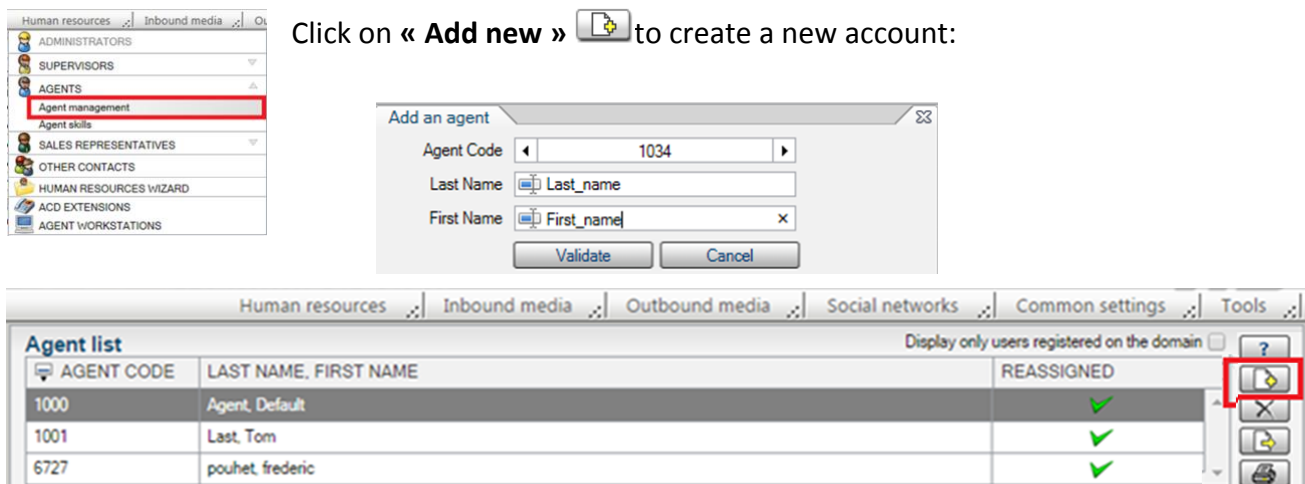
2. STEP BY STEP

To set up your campaign, you must go through several important steps, described below. The order given here is generally considered the best, although it is possible to follow a different order. Once you get familiar with the Hermes system, you'll be able to follow the order you like best, but for starters, we recommend that you follow the order and instructions given here.

3. CREATE AGENTS ACCOUNTS

Click on **« Human Resources »**, then under **« Agents »** select **« Agent management »**.

Click on **« Add new »** to create a new account:

Creating an agent/supervisor account is similar. Each account receives a **4 digit Agent code or login** *(for ex. 1000)*, and a **4 digit password** *(letters)*, that can be changed by clicking the button.

You can configure the following tabs:

✓ **General :** general information, **hang-up after call** *(useful if agents don't use headsets)*, **automatically ready** options *(to reduce the time between worked times = call + wrap-up)*, automatic pick up *(softphones & Avaya)*, media blending, and agent's personals callback.

- ✓ **Skills :** assign skillgroups and relevant levels to the agent.

- ✓ **Applications :** assign the workspace you want, its display parameters, and supervision/rights to the group if you wish to do so.

- ✓ **Rights :** assign phone rights, supervision rights *(if selected under the previous tab)*, and media blending rights if necessary.

- ✓ **Assignment :** assign inbound queues and outbound campaigns. In the **« Reception »** section, **« Auto start »** column, clicking on ⋯ to set at least one campaign of the related queue in auto start mode *(otherwise, the agent will have to start it manually in his workspace)*.
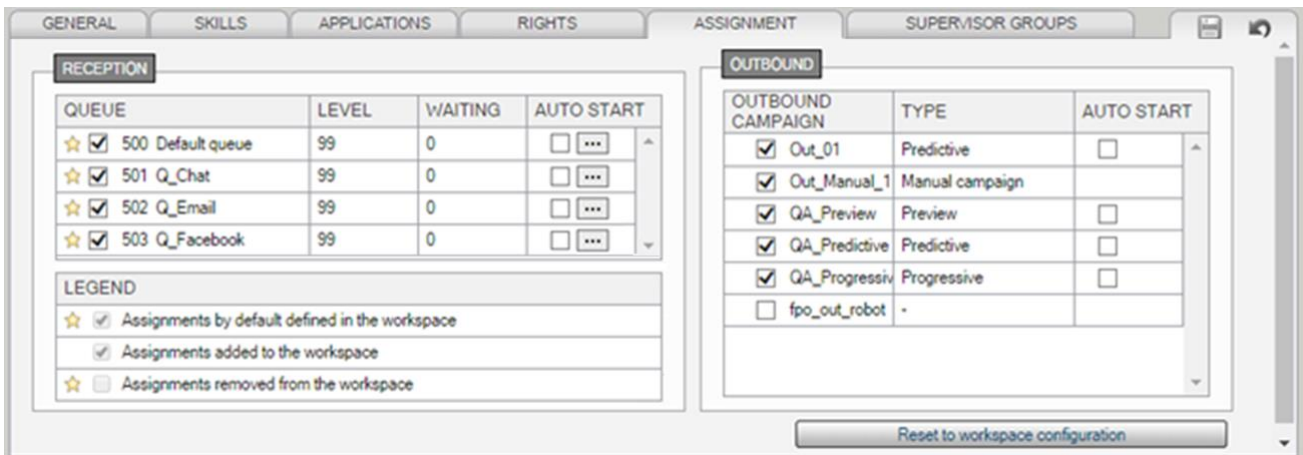
✓ **Supervisor groups :** As well as an agents group , it is possible to create a supervision group and assign agents and supervisors to it. In the case of a big team, it reduces the scope of supervisors to a particular group of agents.
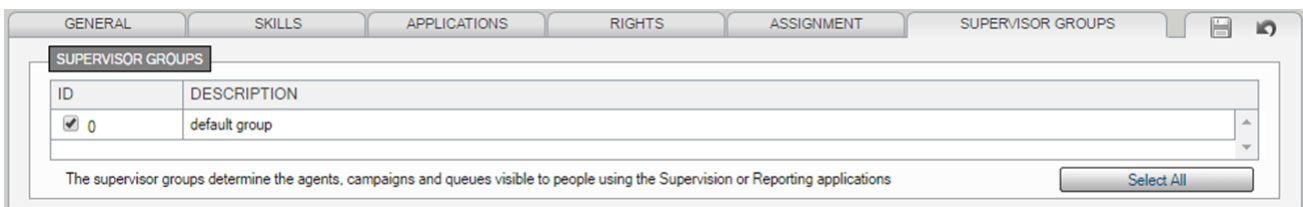
4. CREATE SUPERVISORS ACCOUNTS

In order to create a supervisor, you just need to, when creating an agent account, give him supervision and reporting *(optional)* rights. This account will be automatically bumped to supervisor level, and the user will have access to the Supervision and Reporting modules.

You can also directly create a Supervisor account in the **Supervisor** menu of **Human Resources**, using the same principles as agent creation, if you wish to do so.

5. CREATE ACCOUNTS VIA THE WIZARD

Another way to create an account is to use the **« Human Resources Wizard »**.

Connect to Hermes.Net, select the site in the **« Applications »** tab, select the wizard **« Human Resources »** in the **« Administration »** sub-tab, and click on **« Launch the selected wizard »**.

Click on « **Next** » to reach Step 2 : configuring the data import.

Select the file from which you want to import the list of agents.

You can set a filter, if you want to import only part of the agents listed in the file.

Match the columns of the file with the fields in Hermes.

Check that the agents you want to import are properly listed.

Click on **« Next »** to reach Step 3 : Administrators management.

Click on **« Next »** to reach Step 4 : Agents management.

Click on « **Next** » to reach Step 5 :Supervisor management.

Click on « **Next** » to reach Step 6 : Sales representatives management.
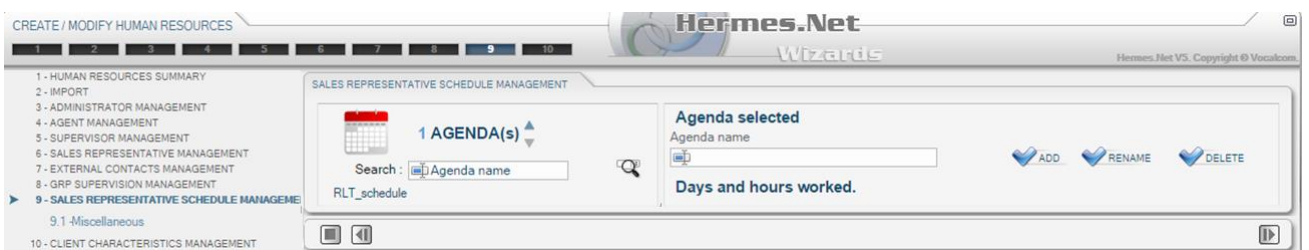

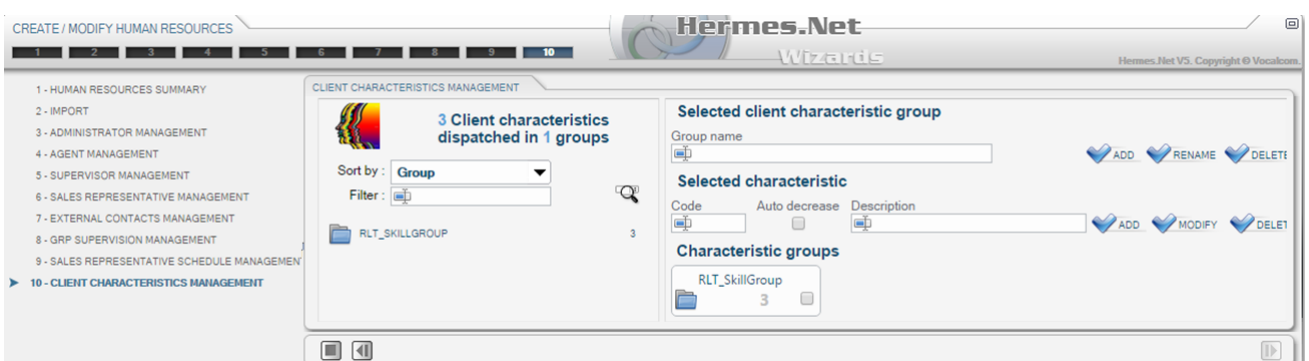Click on « **Next** » to reach Step 7 : External contacts management.
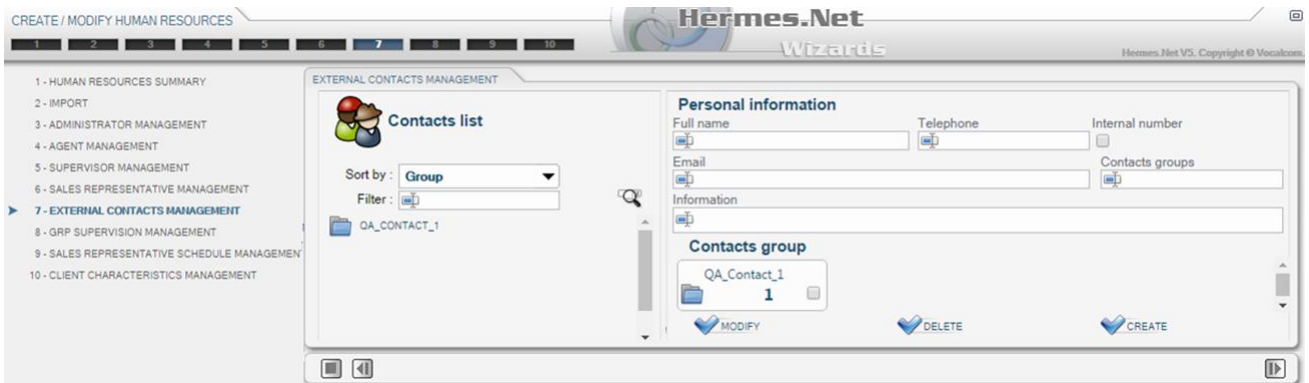
Click on « Next » to reach Step 8 : Supervisor groups management.
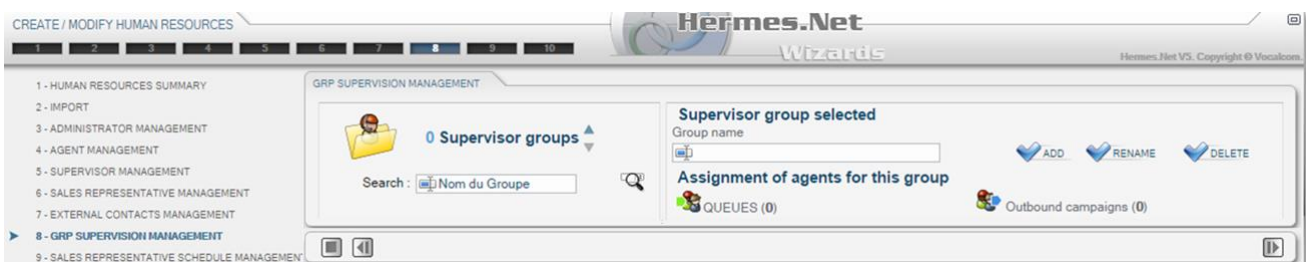
Click on « Next » to reach Step 9 : Sales representatives agenda management.

Click on **« Next »** to reach Step 10 : Clients characteristics management.

At the last stage of the wizard, click on **« QUIT »** .