

HERMES.NET V5
Documentation

Campaign Administration

EMAIL

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 Email campaign management 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 **Email campaigns** at an operational level.

LEGAL NOTICE

This documentation is protected by national and international copyright laws.

The name VOCALCOM® and his logo are the registered trademarks of the VOCALCOM S.A. S. company with its head office located at 25 rue Balzac 75008 PARIS – FRANCE. The name HERMES.NET™ is protected by the national and international commercial using right, and, more broadly, by national and international software copyright. All other products, names or companies are the brands or registered trademarks of their respective owners.

Reproduction of all or part of this publication in any form is strictly prohibited (art. L122-4 et L122-5 C.P.I.) without the prior permission of the publishers.

The publishing company may not be held liable for typographical errors, image impressions, or any other means and the consequences of misusing the present documentation.

The aim of this documentation is for education and training of individuals. That it must not in any way be interpreted as a contract, a convention (included sui generis), an advertising space and/or promotional in any form.

REVISIONS HISTORY

Document version	Date	Revision Description
0.1	06-13-2014	First Version by TW
0.2	03-29-2017	Content & template by TW
0.3	08-31-2017	Content update after JCO review
1.0	09-22-2017	Validated version

REFERENCE DOCUMENT

Document version	Date	Revision Description
Hermes.Net V5		

© 2016 – 2021 VOCALCOM S.A.S – All rights reserved



TABLE OF CONTENTS

- 1 WHAT IS THIS DOCUMENT ? 1
- 2 STEP BY STEP..... 1
- 3 WHAT TO DO IN THE INTERFACE DESIGNER MODULE 1
 - 3.1 Create the Client File 1
- 4 WHAT TO DO IN THE ADMINISTRATION MODULE 1
 - 4.1 Create a Queue 2
 - 4.2 Set up the Campaign’s General Parameters..... 2
 - 4.3 Link an Email Account..... 5
- 5 REQUIRED COMMON FEATURES..... 6
 - 5.1 Create or assign Disposition Codes 6
 - 5.2 Create Agents Accounts..... 6
 - 5.3 Create Agent Workspace 6
- 6 RECOMMENDED COMMON FEATURES..... 6
 - 6.1 Create or assign Service Hours & Holidays Plan 6
 - 6.2 Create your Address Book 6
- 7 OPTIONAL COMMON FEATURES..... 7
 - 7.1 Add Skills..... 7
 - 7.2 Add Predefined Answers & Attachments..... 7
 - 7.3 Add a Survey 7
- 8 CHECK THE SUMMARY OF YOUR CAMPAIGN 7
- 9 TEST AS AN AGENT 7



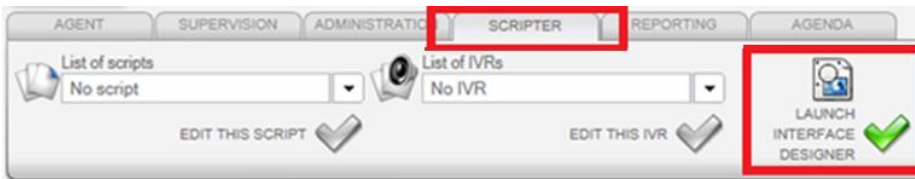
1 WHAT IS THIS DOCUMENT ?

The aim of this document is to explain how to create and install step by step an email 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.

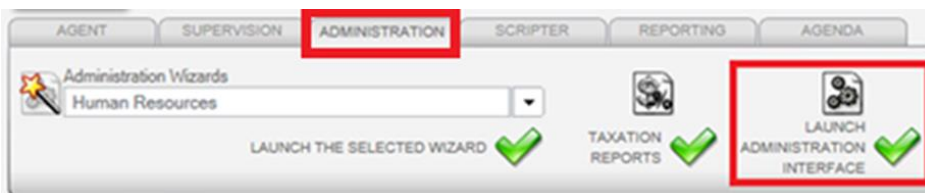
3 WHAT TO DO IN THE INTERFACE DESIGNER MODULE



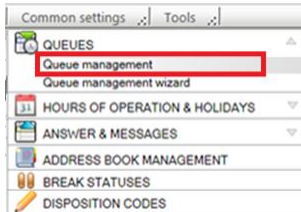
3.1 CREATE THE CLIENT FILE

Please refer to the document « *Common features – Script & Client file.doc* ».

4 WHAT TO DO IN THE ADMINISTRATION MODULE

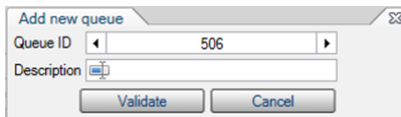


4.1 CREATE A QUEUE



Click on « **Common settings** », then select « **Queue management** ».

Click on « **Add** »  to create a new queue.



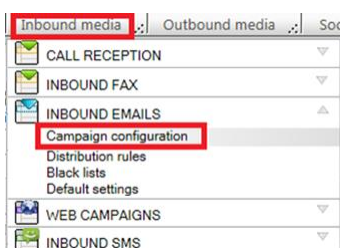
It triggers the display of a popup. Enter Queue ID & description, and then click on « **Validate** ».

4.2 SET UP THE CAMPAIGN'S GENERAL PARAMETERS

Now that your queue is ready, your script is created and published; you have to finish creating your campaign, by joining together all the elements necessary for it to run smoothly. A campaign is nothing but a series of vital parts linked together, that will interact with the telephony. Some elements are **mandatory**, while some others are purely **optional**.



NOTE: The « Default Settings » sub-menu allows you to create parameters for all your email campaigns, applied by default.



In the « **Inbound media** » menu, « **Inbound email** » section, select « **Campaigns configuration** »:

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



Hermes.Net Administration Copyright © Vocalcom V5.5

Human resources | Inbound media | Outbound media | Social networks | Common settings | Tools

Email campaign list

SERVER TYPE	QUEUE	STATE	CAMPAIGN NAME
IMAP	500 - Attente Test réseau social	Active	test
IMAP	500 - Attente Test réseau social	Active	Test_Mathieu
IMAP	501 - Appel entrant	Active	Ex formation
IMAP	-	Inactive	Campaone email Test Emmanuel

GENERAL | CUSTOMER | CALLBACKS | ACCOUNT | ANSWERS | OPENING

PARAMETERS

Campaign name: test
Queue: 500 - Attente Test réseau social
Priority in queue: 0
Distribution rule: 22312
Black list: -- no black list --
Delete email assignment to an agent if not answered after: 4 half days

Add email campaign

ID: Automatically generated ID
Campaign name: camp_mail_rt
Database: FR_TEST_V5_FRANCE
Buttons: Validate, Cancel

Choose the name of the campaign, and choose the database it will use. Then click on « **Validate** ».

Under the different tabs, you'll be able to set up all the elements of your campaign. Noticeably, select the queue on the « **General** » tab.

Hermes.Net Administration Copyright © Vocalcom V5.5

Human resources | Inbound media | Outbound media | Social networks | Common settings | Tools

Email campaign list

SERVER TYPE	QUEUE	STATE	CAMPAIGN NAME
IMAP	-	Inactive	camp_mail_rt
IMAP	500 - Attente Test réseau social	Active	test
IMAP	500 - Attente Test réseau social	Active	Test_Mathieu

GENERAL | CUSTOMER | CALLBACKS | ACCOUNT | ANSWERS | OPENING | SKILLS

PARAMETERS

Campaign name: camp_mail_rt
Queue: -- no queue: inactive campaign --
Priority in queue: 0
Distribution rule: 501 - Appel entrant
Black list: 503 - File 2303, 504 - toto, 505 - testee, 506 - test rit, 508 - Formation interne, 509 - INBOUND test
Delete email assignment to an agent if not answered after: 4 half days

Under the « **Account** » tab, in the « **Email account configuration** » fill in the fields « **User** », « **Email address** », « **Password** » (of the email address), and then click « **Save** ».

Hermes.Net Administration Copyright © Vocalcom V5.5

Human resources | Inbound media | Outbound media | Social networks | Common settings | Tools

Email campaign list

SERVER TYPE	QUEUE	STATE	CAMPAIGN NAME
IMAP	506 - test_rt	Active	camp_mail_rt
IMAP	500 - Attente Test réseau social	Active	test
IMAP	500 - Attente Test réseau social	Active	Test_Mathieu

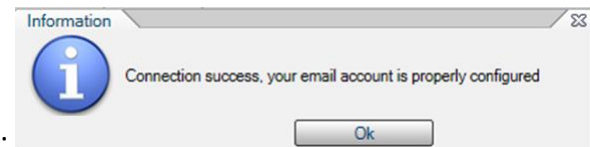
GENERAL | CUSTOMER | CALLBACKS | ACCOUNT | ANSWERS | OPENING | SKILLS

EMAIL ACCOUNT CONFIGURATION

Server type: IMAP
Server address: imap.gmail.com
User: testvocal123
Inbound mailbox: Inbox
Check new messages every: 120 seconds
Port: 993
Secured connection (SSL):
Password: *****
Email address: testvocal123@gmail.com
Buttons: Check configuration

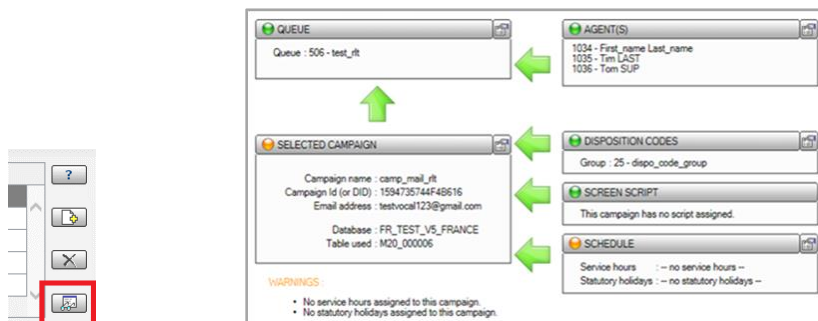
ACTION TAKEN DURING EMAIL READING

Move to ...: Managed



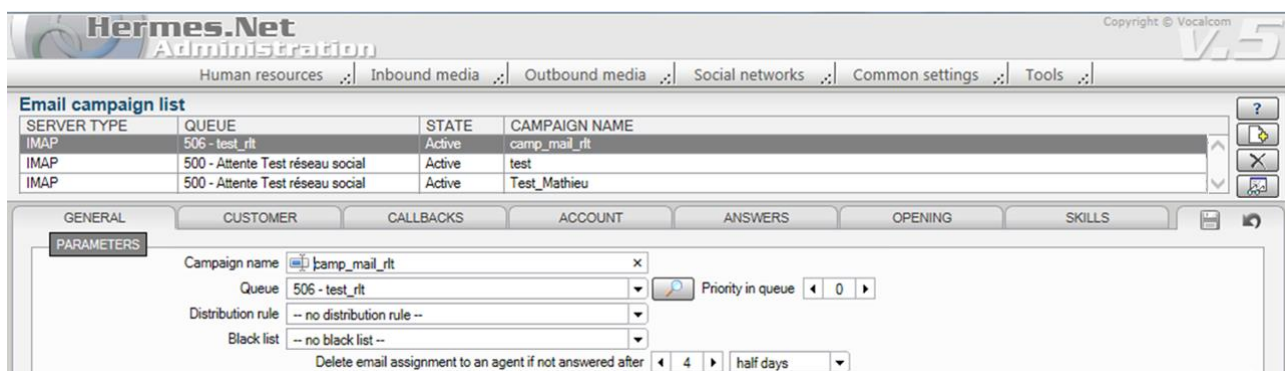
You can click on the button « **Check configuration** » :

You have a very useful diagnostic tool at your disposal, the **Campaign Summary** that can tell you which elements are present or missing on your campaign at all times. **We recommend you use this tool often when creating your first campaign.**



- A green dot means the element is set up correctly.
- An orange dot means that alerts have been detected. The campaign could be started, but maybe won't work correctly.
- A red dot means that alerts have been detected. The campaign won't work at all.

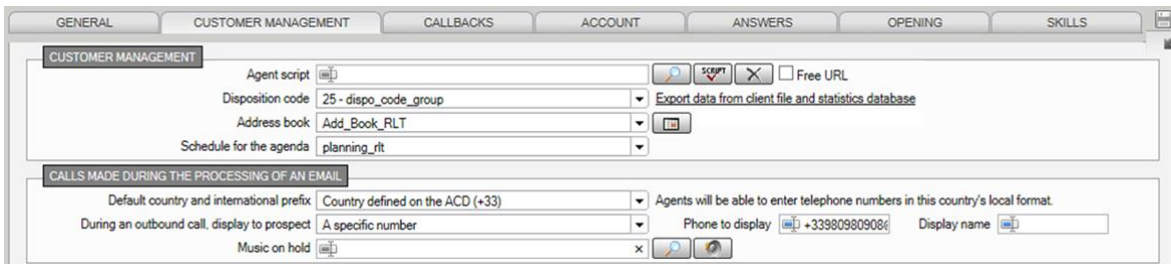
Under the « **General** » tab, you can now set up:



- ✓ the **queue** previously created
- ✓ the **priority of the queue** (if several campaigns use the same queue)
- ✓ the distribution rules
- ✓ the **black list**
- ✓ the Email assignment rules
- ✓ the callback deadlines : the general rules that apply to agents when create callback reminders about this campaign.



Under the « **Customer** » tab, you can now set up :

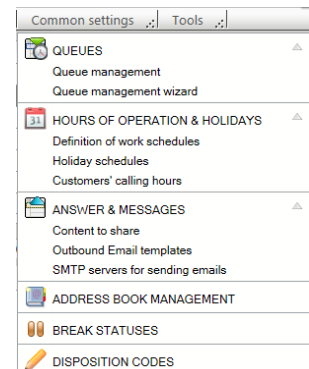


- ✓ **Web script** : select the screen script you have created.
- ✓ **Supporting actions** : if the desired workspace supports email campaigns email setting.

Under the « **Answers** » tab, you can now set up :

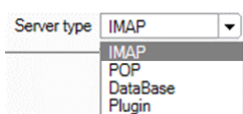


- ✓ Reply-to address (*meaning : sender address for your emails*).
- ✓ Automatic answers
- ✓ Answer template
- ✓ Predefined answer & attachment
- ✓ Hidden recipient



NOTE : most of these are created in the « **Common settings** » menu.

4.3 LINK AN EMAIL ACCOUNT



Obviously, the critical element in the campaign is the account you want to link it to. Go to the « **Account** » tab, and select the server type you want to use :



Next, type the server address, select the port, tick the box « **Secured connection (SSL)** », and configure the other elements of the account :

You can then decide what to do with emails being dealt with by agents, and how often the email inbox refreshes itself, and click on « **Save** ».

5 REQUIRED COMMON FEATURES

5.1 CREATE OR ASSIGN DISPOSITION CODES

Please refer to the document « *Common features – Disposition codes.doc* ».

5.2 CREATE AGENTS ACCOUNTS

Please refer to the document « *Common features – Agents Account.doc* ».

5.3 CREATE AGENT WORKSPACE

Please refer to the document « *Common features – Agent workspace.doc* ».

6 RECOMMENDED COMMON FEATURES

6.1 CREATE OR ASSIGN SERVICE HOURS & HOLIDAYS PLAN

Please refer to the document « *Common features – Service hours & Holidays plan.doc* ».

6.2 CREATE YOUR ADDRESS BOOK

Please refer to the document « *Common features – Address book.doc* ».

7 OPTIONAL COMMON FEATURES

7.1 ADD SKILLS

Please refer to the document « **Common features – Skills.doc** ».

7.2 ADD PREDEFINED ANSWERS & ATTACHMENTS

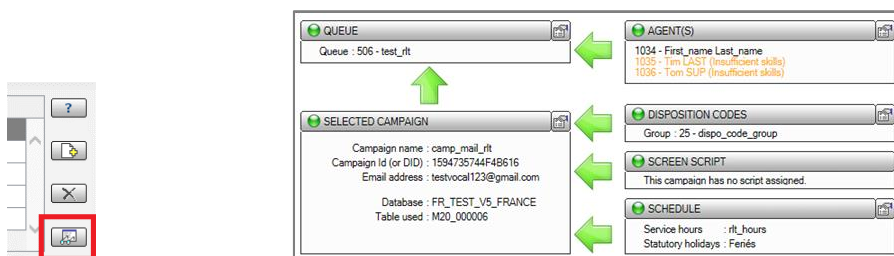
Please refer to the document « **Common features – Predefined answers & Attachments.doc** ».

7.3 ADD A SURVEY

Please refer to the document « **Survey manager.doc** ».

8 CHECK THE SUMMARY OF YOUR CAMPAIGN

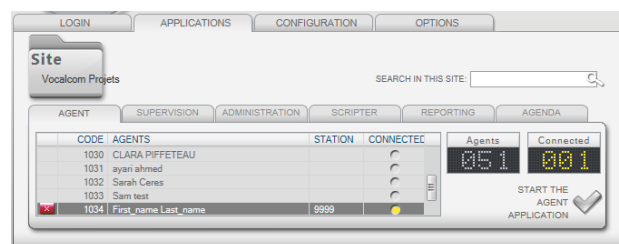
Your campaign should be complete at this stage. Open the campaign, and with the Campaign Summary, check that the vital elements are all in place:



All indicators are green, your campaign is now fully set-up.

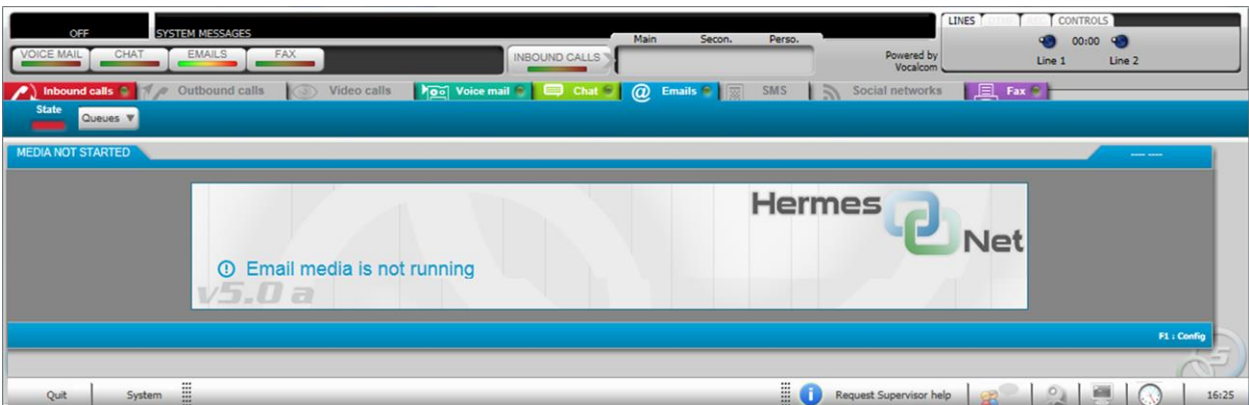
9 TEST AS AN AGENT

Connect to Hermes.Net as an Agent :

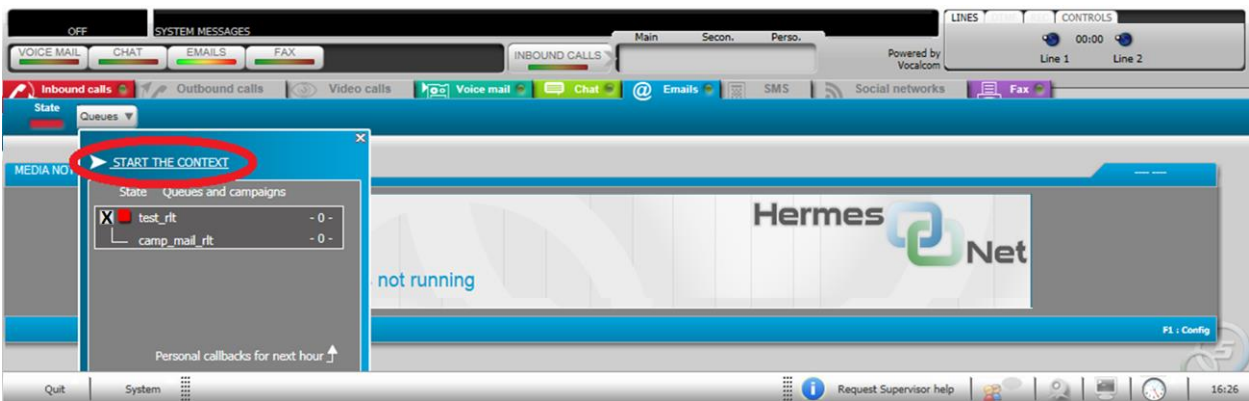




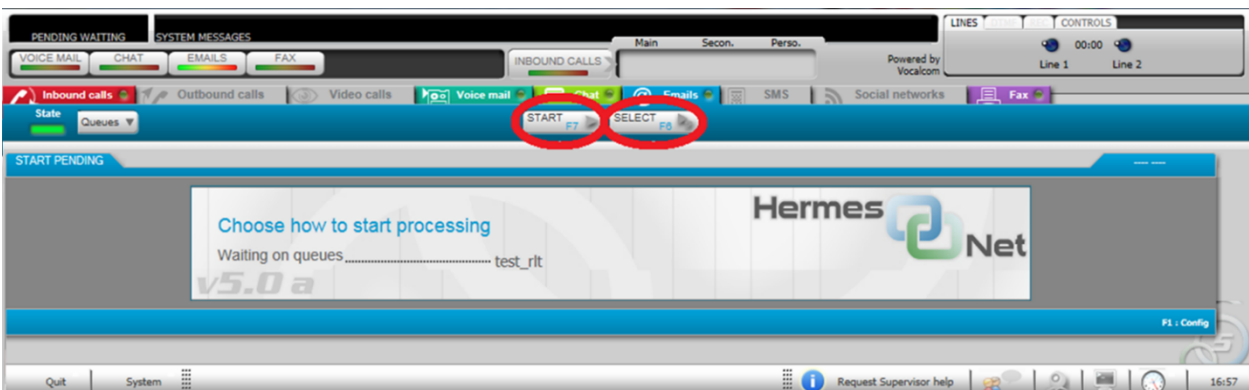
The agent's interface opens, select the « **Email** » tab.



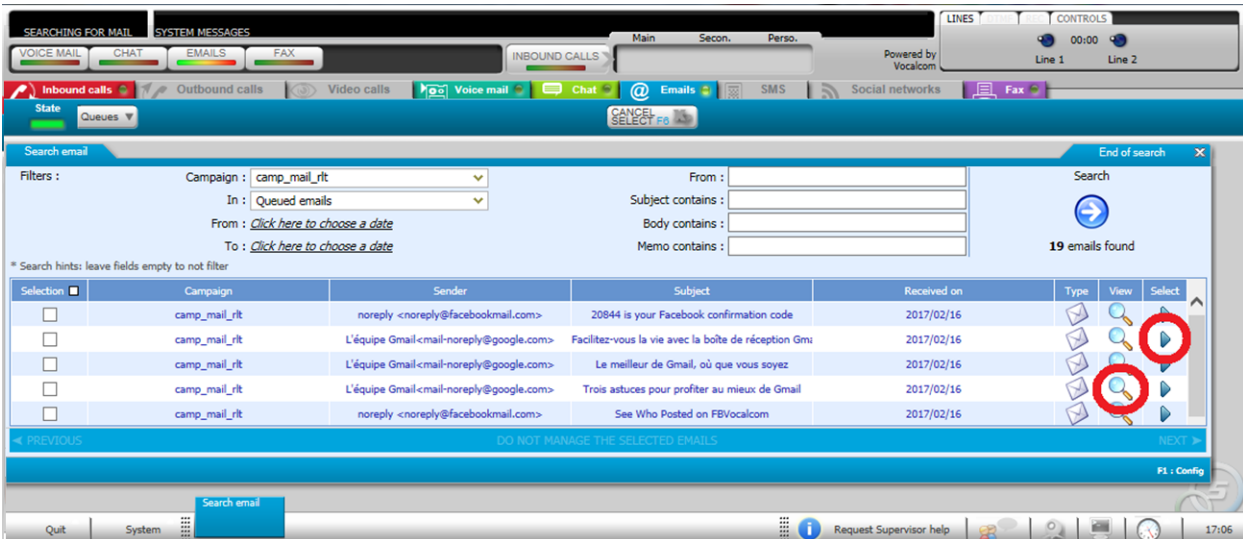
In this example, since the context is set to « **NOT start automatically** » in the Workspace Wizard, you must click on « **Start the context** » :



You now have 2 options to start processing : click the button « **Start (F7)** », or « **Select (F8)** ».

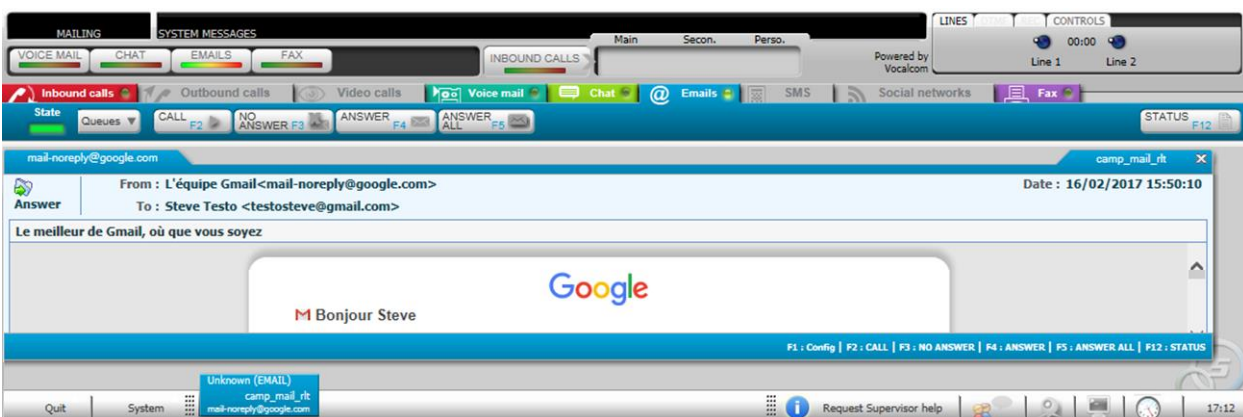


- « **Select (F8)** » allows you to select the email you want to handle first.



If you want to preview the email, click on . Then you can close the preview, to open another one. If you want to handle the email, click on . But then, the next email will open, right after your selected a « **Status (F12)** » to close the current one, until you choose to stop the context.

- « **Start (F7)** » opens the first email in the queue.



You have several options to handle the email : « **Call (F2)** », « **No Answer (F3)** », « **Answer (F4)** », « **Answer All (F5)** ». However, you will have to specify the « **Status (F12)** », before you can close the email, and go on with the next one, until you choose to stop the context.