

**HERMES.NET V5**  
Documentation

# Campaign Management

## Inbound Calls

### User Manual

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<b>Category</b>	User Manuel	<b>Date Version</b>	September 2017
<b>Version</b>	5.5	<b>Approbation</b>	Product Manager

## CONCERNING THIS DOCUMENT

This document provides a description of the **Vocalcom Inbound Calls 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 **Inbound Calls campaigns** at an operational level.

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## REVISIONS HISTORY

Document version	Date	Revision Description
0.1	06-13-2014	First Version by TW
0.2a	04-28-2017	Ref. to Workspace & Voice mail by TW
0.3	09-01-2017	Template & content update by TW
1.0	09-22-2017	Validated version

## REFERENCE DOCUMENT

Document version	Date	Revision Description
Hermes.Net V5		

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## 1 WHAT IS THIS DOCUMENT ?

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The aim of this document is to explain how to create and install step by step an inbound call campaign on Hermes Net, with screenshots and shorts instructions.

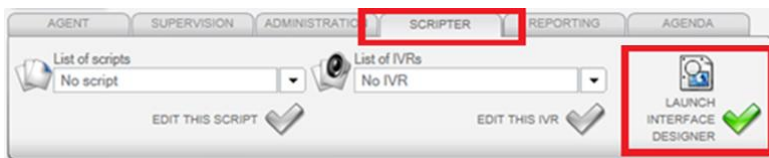
## 2 STEP BY STEP

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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

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### 3.1 CREATE YOUR SCRIPT, CLIENT FILE & GLOBAL VARIABLES

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

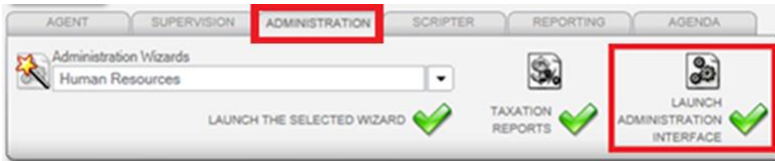


**NOTE: It is recommended that you create a script, a client file and global variables, but not mandatory. Your inbound calls campaign will work nonetheless.**

### 3.2 HOW TO CREATE YOUR IVR SCRIPT

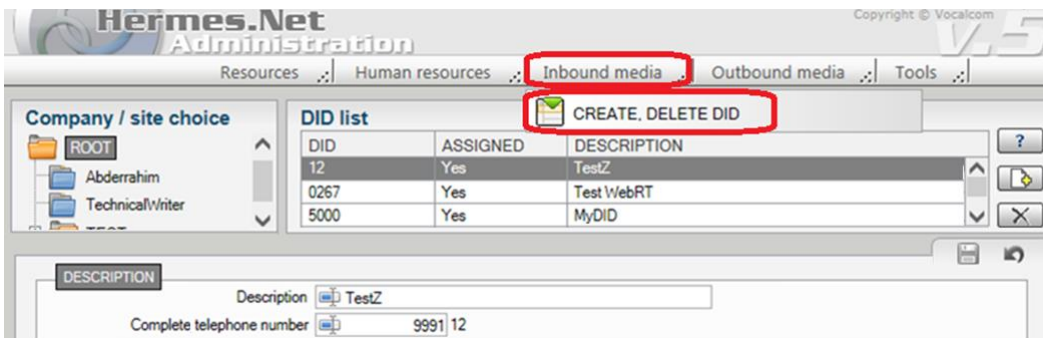
It's possible to create an IVR script (Interactive Voice Response) to be placed upstream of the incoming campaign. This is optional; it is quite possible to run a campaign without inbound IVR. The IVR will be explained in the documentation « **IVR Manuals** ».


## 4 WHAT TO DO IN THE ADMINISTRATION MODULE



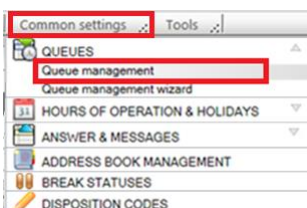
### 4.1 ASSIGNMENT OF DID

In order to be operational, your incoming campaign needs to be connected to the telephone systems, through a **Direct Inward Dialing** or **DID**. If you are hosted in ASP mode, your DID is created and you can just choose in the next step. If you have the full Hermes solution, you have to set up a DID at first. The line is open at the time of the platform installation by the root admin. To get your DID, on **Root**, Click on « **Inbound media** » menu, and select « **Create, delete DID** » :

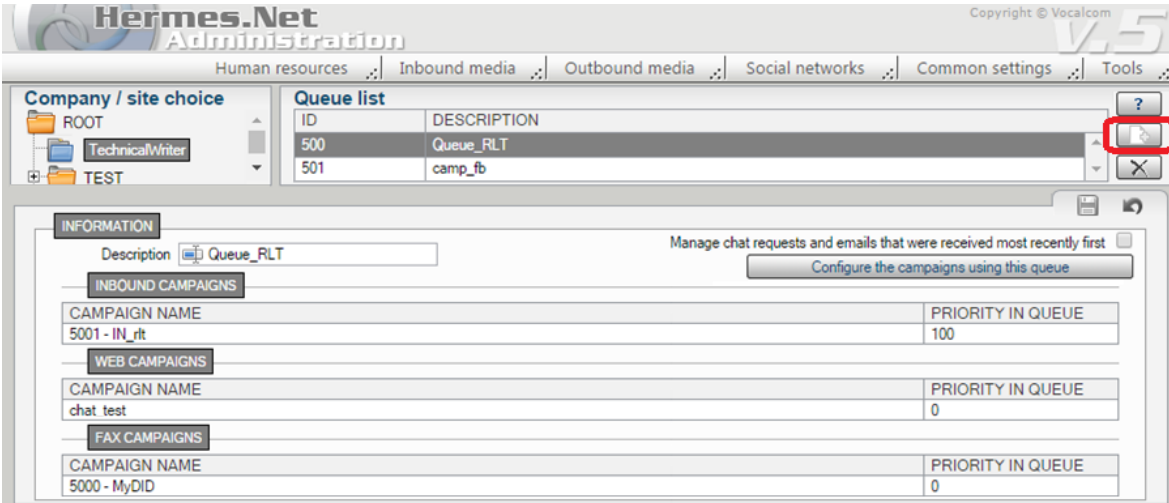



Click on « **Add** » , assign a range of DID, and the site you want to assign the DID.

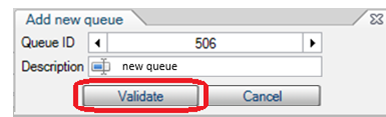
### 4.2 CREATE A QUEUE



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



On the « Queue list » screen, click on « Add »  It triggers the display of a popup window, enter a Queue ID and a description, and then click on « Validate ». The queue is now created.

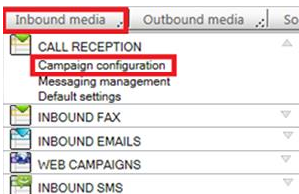


### 4.3 SET UP THE CAMPAIGN'S GENERAL PARAMETERS

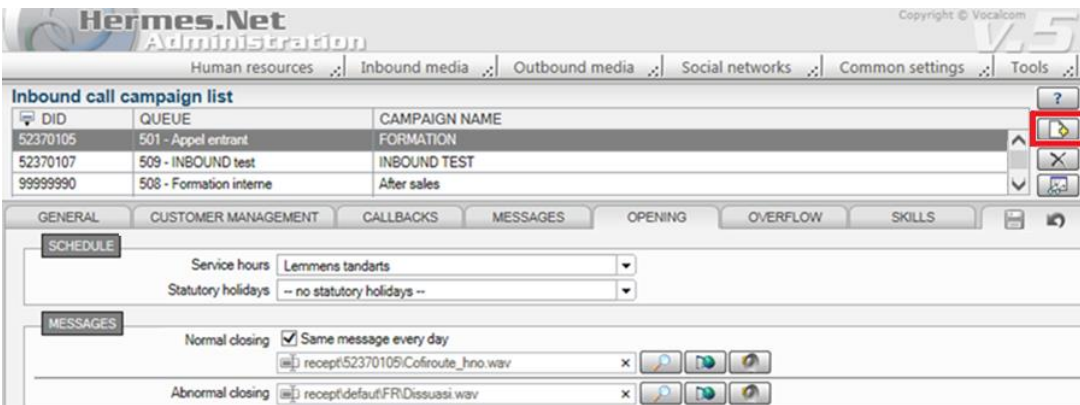
Now that your queue is ready, your script is created and published; you have to create your campaign, by joining together all the elements necessary for it to run smoothly. A campaign is nothing but a series of vital parts linked together, that will interact with the telephony. Some elements are **mandatory**,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




**NOTE: The "Default Settings" sub-menu allows you to create queue parameters for all your inbound campaigns, applied by default.**



Click on the « Inbound media » menu, and select « Campaign configuration » :





On the « Inbound call campaign list », click on « Add new »  to create a new campaign.

It triggers the display of a popup. Choose the DID, enter the name, and then click on « **Validate** ». The campaign is now created, you can see all its elements under the different tabs.

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

- ✓ The **queue** previously created
- ✓ The **maximum number of lines** allowed on the campaign
- ✓ The **priority in queue** (if several campaigns use the same queue)
- ✓ The **language** in which voice messages are played by default
- ✓ **Display to prospect** : number displayed on prospect’s phone when the system calls him
- ✓ The **IVR script** if you create one for the campaign
- ✓ **Callback deadline** : the general rules that apply to agents when creating callback reminders about this campaign
- ✓ **Break inter-calls** : if your country has a specific regulation

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

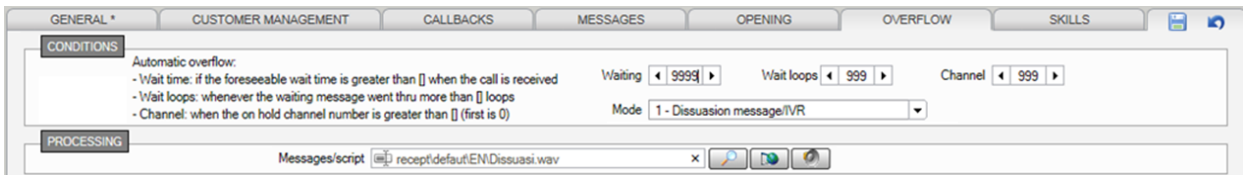
- ✓ **Web script** : select the screen script you have created
- ✓ **Supporting actions** : if the desired workspace supports email campaigns

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



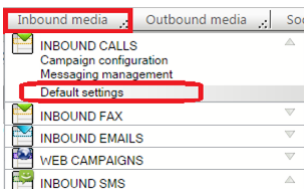
- ✓ The voice messages are played according to the type of situation faced by the client. The call announcement will be played to alert the agent when he receives a call from this campaign.

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



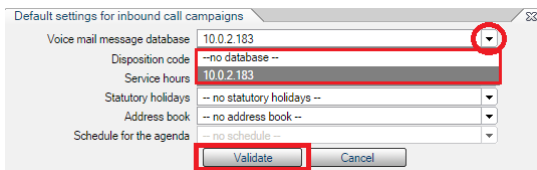
- ✓ **Conditions** : manages the overflow strategy if one of the criteria (wait time, wait loops, channels, customer waiting) is met. Four strategies are configured in Hermes.Net : Dissuasions message / IVR, Rerouting, Telephone number entry (callback), Voice mail.

#### 4.4 SET UP THE VOICEMAIL MESSAGES PARAMETERS

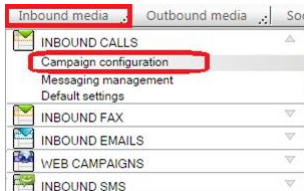


In the « **Inbound media** » menu, select « **Default settings** » :

It triggers the display of a popup window, on which you need to select the database used for Voice mail messages, and then click on « **Validate** ».

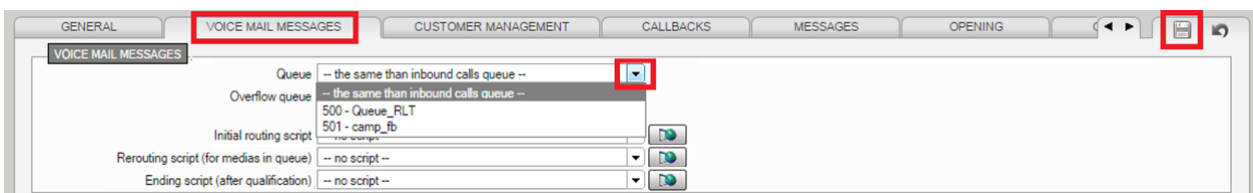


In this popup window, you can also select the disposition codes, service hours, statutory holidays, address book, and agenda schedule.

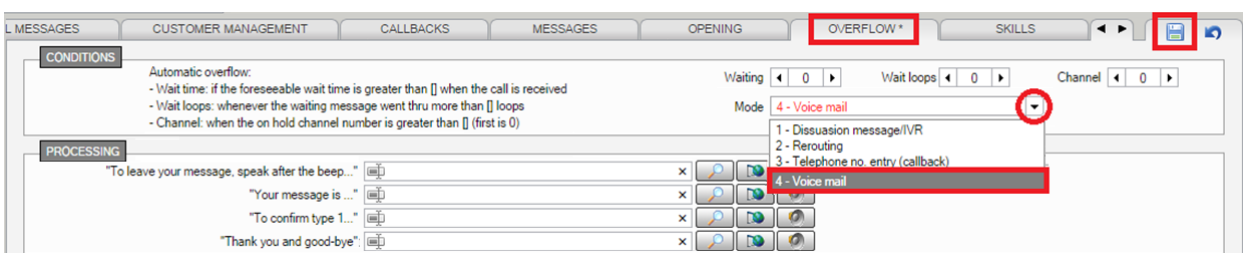


In the « **Inbound media** » menu, select « **Campaign configuration** » :

First of all, under the « **Voice mail messages** » tab, select the queue (*same queue as the inbound calls campaign, or another one*) for which clients will be entitled to leave a message, and then click on « **Save** » :






Now under the « **Overflow** » tab, open the « **Mode** » dropdown list, and select « **4 – Voice mail** ». It displays the audio files selection panel in the « **Processing** » section.







- Click on « **Search** » button  to select audio files already recorded on Hermes server.
- Click on « **Add file** » button  to select audio files already recorded on your computer.
- Click on « **Listen** » button  to check message relevancy and sound quality of audio files.

Once the fields are populated with the relevant audio files, click on « **Save** ».

## 5 REQUIRED COMMON FEATURES

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### 5.1 CREATE AGENT ACCOUNTS

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

### 5.2 CREATE AGENT WORKSPACE

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

## 6 RECOMMENDED COMMON FEATURES

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### 6.1 CREATE DISPOSITION CODES

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

### 6.2 CREATE SERVICE HOURS & HOLIDAYS PLAN

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

### 6.3 CREATE YOUR ADDRESS BOOK

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

## 7 OPTIONAL COMMON FEATURES

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### 7.1 ADD SKILLS

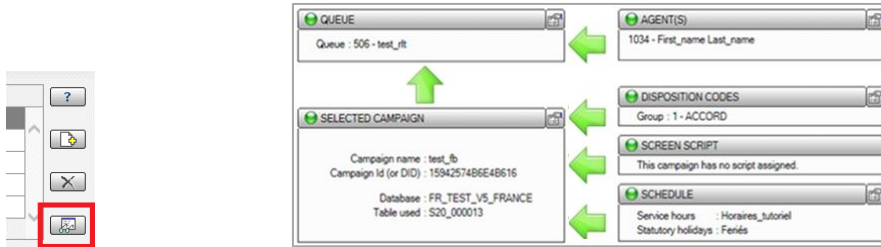
Please refer to the document « **Common features – Skills.doc** ».

### 7.2 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:

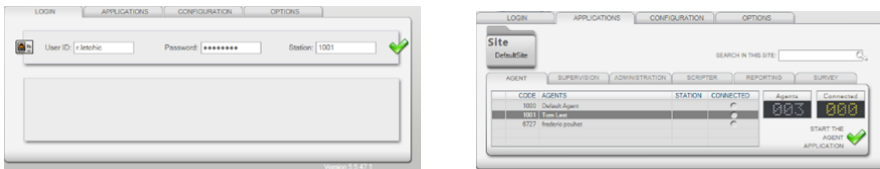


- A green dot means the element is set up correctly.
- An orange dot means that alerts have been detected. The campaign could be started, but maybe won't work correctly.
- A red dot means that alerts have been detected. The campaign won't work at all.

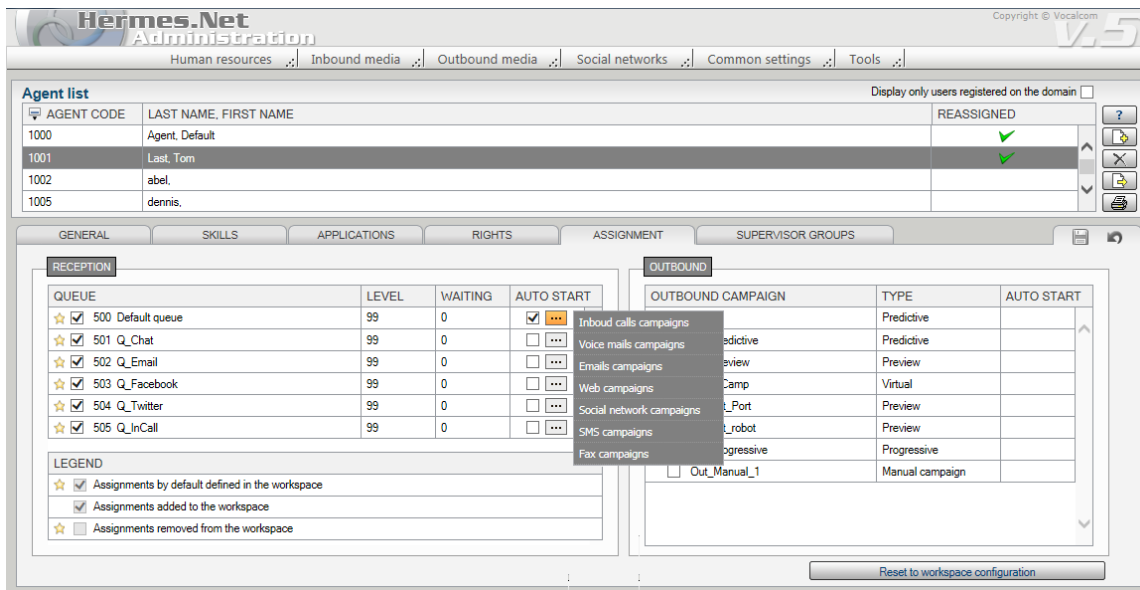
All indicators are green, your campaign is now fully set-up.

## 9 TEST AS AN AGENT

The agent logs onto a station (*here, station #1001 – SIP external softphone*).



The agent is assigned to a queue (*here, 500\_Default\_queue*) on which the inbound calls campaign starts automatically.

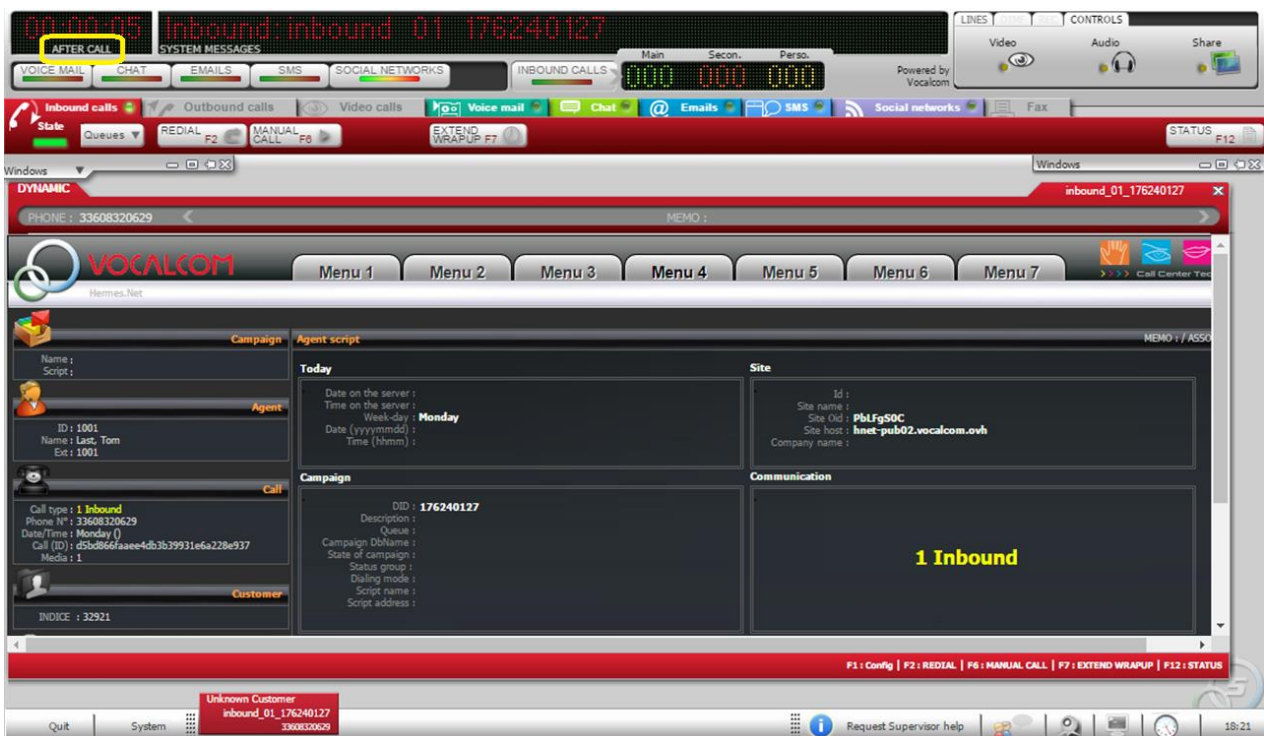




Therefore, as soon as the client calls, his record is displayed and the agent's status is « **Online** ».



The agent handles the client's request, the client hangs up, the status turns to « **After call** ».



The agent clicks on « **Status** » in order to qualify the call with a disposition code.



This closes the client's record, and the agent is now ready to receive a new call from a client. Furthermore, the agent can switch to another media (to which he has previously been assigned), e.g. listen to Voice mail messages, by clicking on the related tab.