

HERMES.NET V5
Documentation

Campaign Administration

MANUAL CALLS

User Manual



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|-----------------|-------------|-------------------------|-----------------|
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| Category | User Manuel | Date Version | September 2017 |
| Version | 5.5 | Approbation | Product Manager |

CONCERNING THIS DOCUMENT

This document provides a description of the **Vocalcom Manual 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 **Manual 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 |
| 0.2 | 03-29-2017 | Ref. to Agent Workspace 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 ?

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

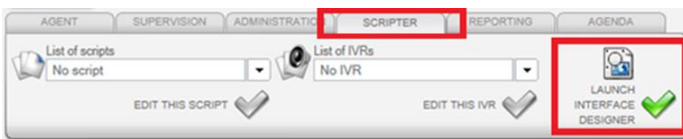
2 STEP BY STEP

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



NOTE: It's not necessary to create a screen script for a manual campaign, if you do not need it. As you will see later, you can use a free URL.



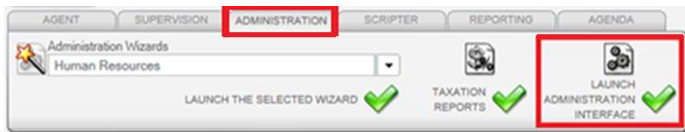
3.1 CREATE YOUR SCRIPT, CLIENT FILE, AND GLOBAL VARIABLES

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



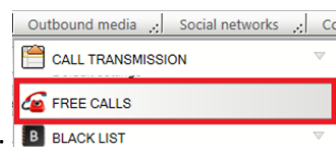
NOTE: It is recommended that you create a script, a client file, and global variables, but not mandatory. Your campaign will work nonetheless.

4 WHAT TO DO IN THE ADMINISTRATION MODULE



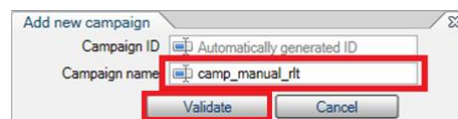
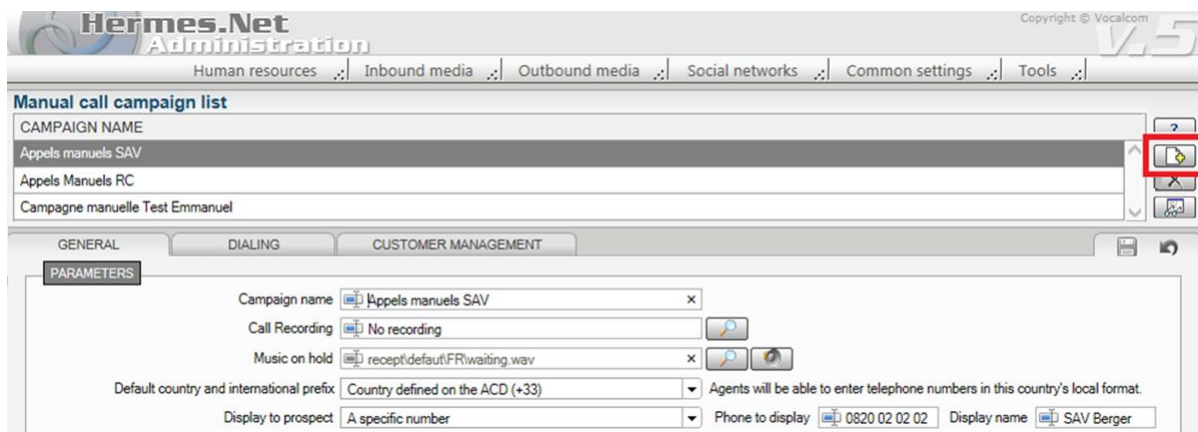
4.1 SET UP THE CAMPAIGN'S GENERAL PARAMETERS

Now that 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**.



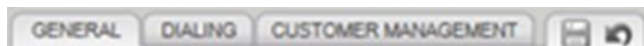
Click on the « **Outbound media** » menu, and select « **Free calls** » :

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

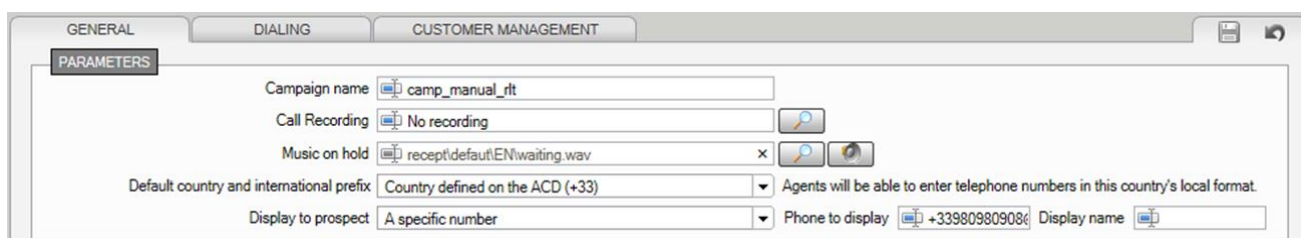


Type the name of the campaign, and then click on « **Validate** ».

Under the different tabs, you can see all the elements of your campaign.



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



✓ The **on hold music** you like

- ✓ **Display to prospect** : what number displays on the prospect's phone when the system calls him

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

- ✓ The **operator** (if specific)
- ✓ The **audio codec** (if softphone used)
- ✓ **Forbidden prefixes** (if necessary to block prefixes)

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

- ✓ **Web script** : select the screen script you have created
- ✓ **Disposition code** : select the group of call statuses
- ✓ **CRM** : select the address book (*mandatory – Cf. supra §5.2*)
- ✓ **Planning** : select the schedule for sales representatives
- ✓ **Email sent during the call processing** : if the desired workspace supports email campaigns. We'll set up the other parameters later.

5 REQUIRED COMMON FEATURES

5.1 CREATE DISPOSITION CODES

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

5.2 CREATE YOUR ADDRESS BOOK

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

5.3 CREATE AGENTS ACCOUNTS

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

5.4 CREATE AGENT WORKSPACE

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

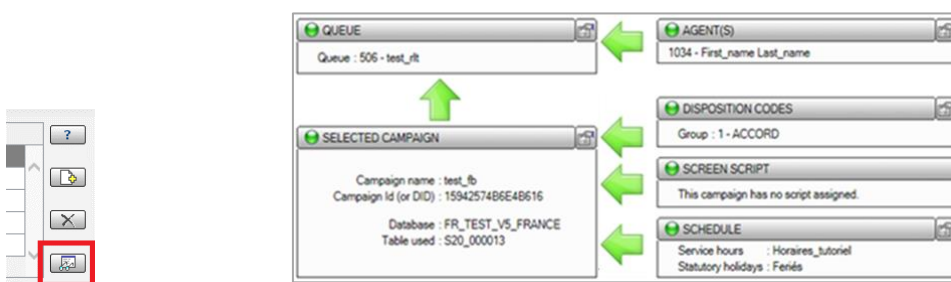
6 RECOMMENDED COMMON FEATURES

6.1 CREATE SERVICE HOURS & HOLIDAYS PLAN

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

7 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:

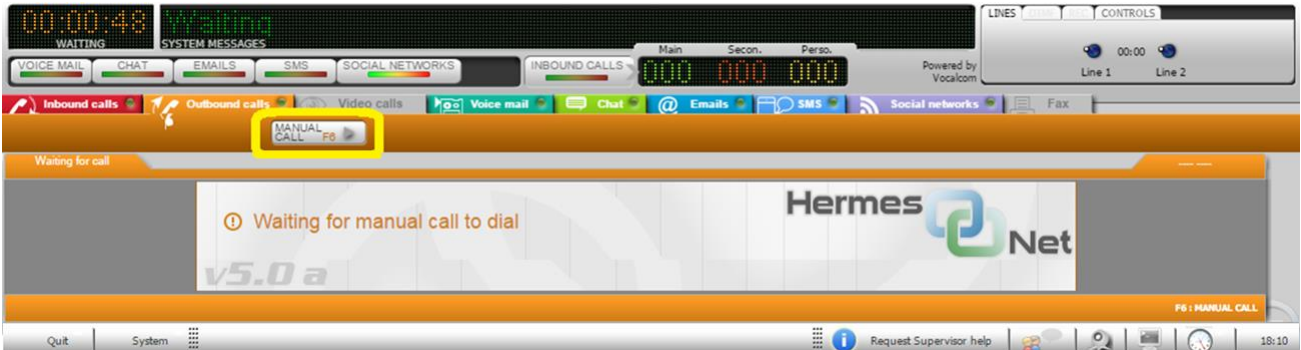


- A green dot means the element is set up correctly.
- An orange dot means that alerts have been detected. The campaign could be started, but maybe won't work correctly.
- A red dot means that alerts have been detected. The campaign won't work at all.

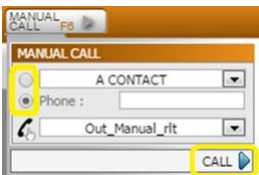
All indicators are green, your campaign is now fully set-up.

8 TEST AS AN AGENT

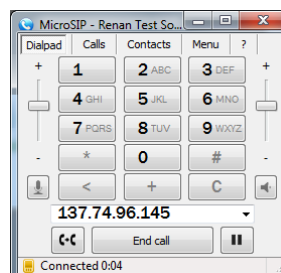
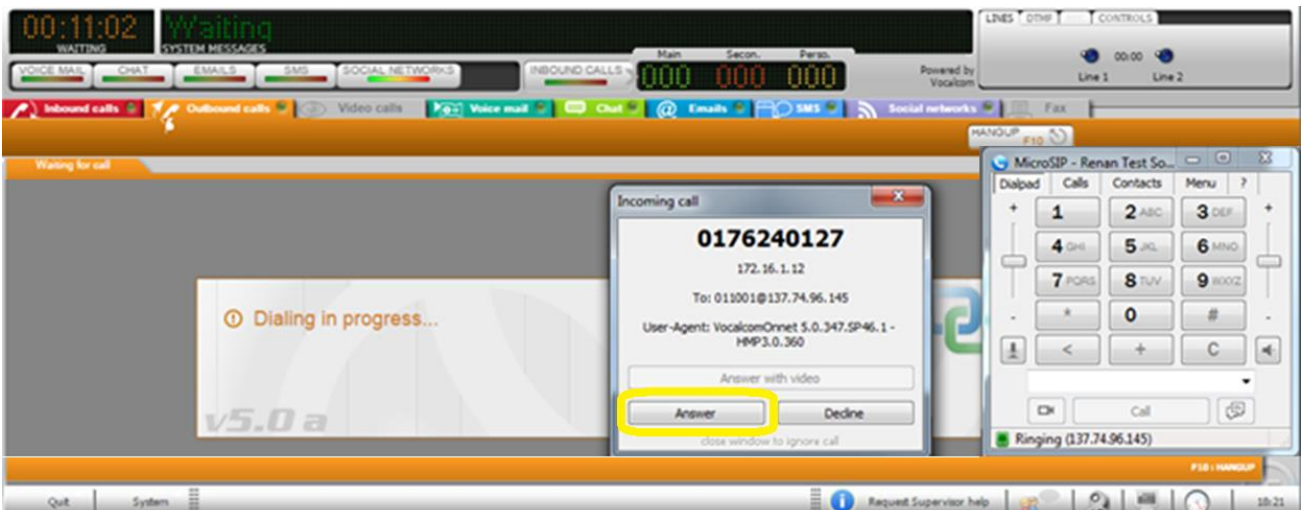
Connect as an Agent. On the « **Outbound campaign** » tab, click on « **Manual call (F6)** » :



A popup opens, either select a contact to call or dial a specific phone number.

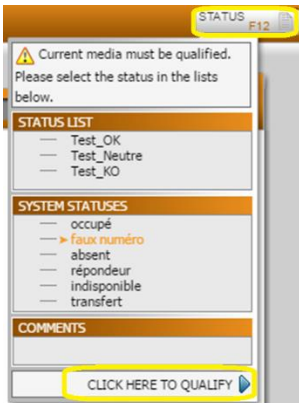
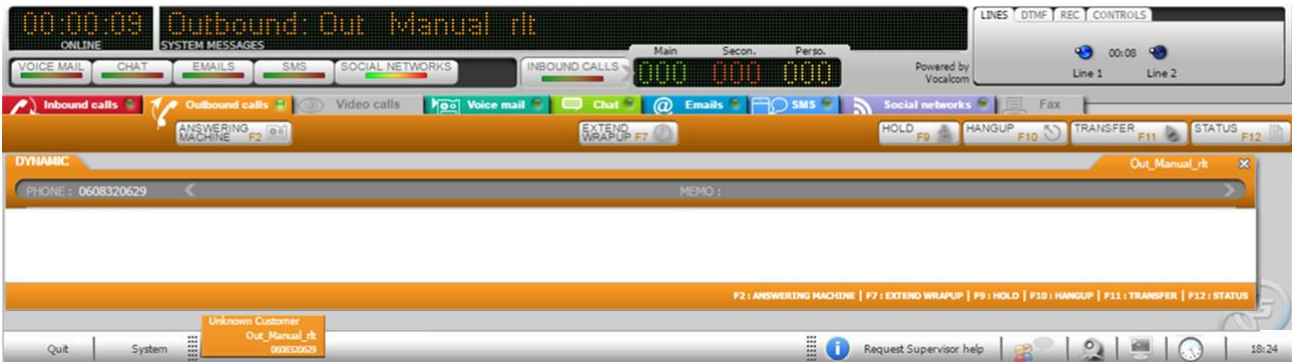


Click on « **Call** », MicroSIP opens, click on the « **Answer** » button.



MicroSIP connects the agent with the ACD :

When the client called by the agent picks up his phone, Hermes displays the script (*if attached to the campaign, otherwise, as in the example below, it displays a blank screen during the call*).



When the client hangs up, the call is terminated.

The agent qualifies the call with a disposition code.

Hermes is now ready for the agent to pass the next manual call.

