

HERMES.NET V5
Documentation

Campaign Administration

OUTBOUND CALLS

User Manual



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Category	User Manuel	Date Version	September 2017
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CONCERNING THIS DOCUMENT

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

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REVISIONS HISTORY

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REFERENCE DOCUMENT

Document version	Date	Revision Description
Hermes.Net V5		

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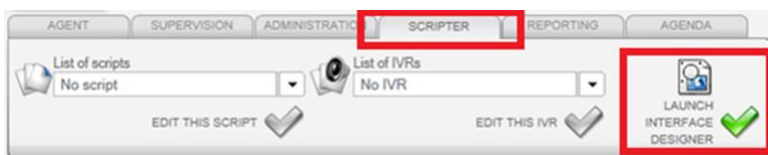
1 WHAT IS THIS DOCUMENT ?

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



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



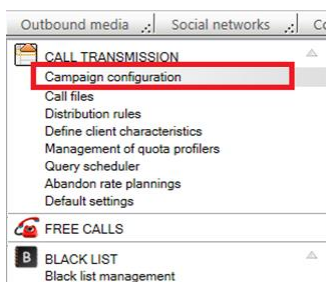
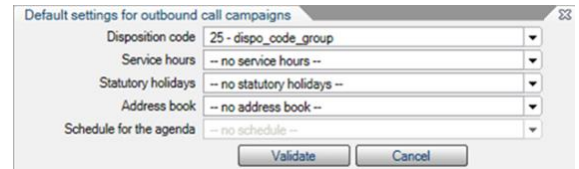


4.1 SET UP THE CAMPAIGN'S GENERAL PARAMETERS

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**.

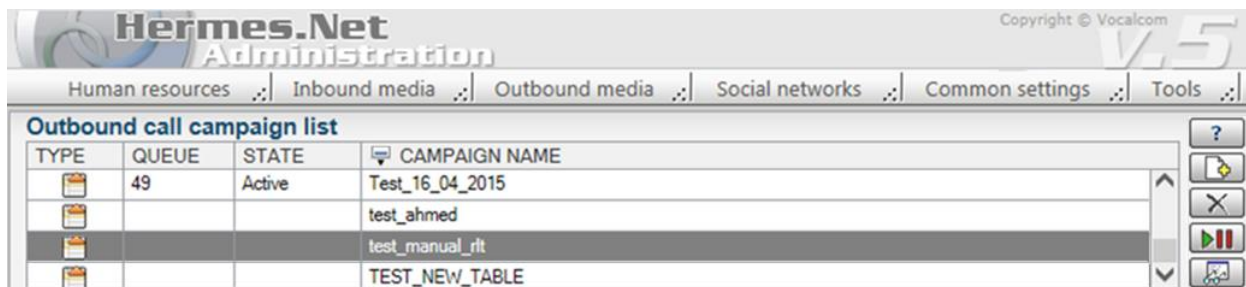


NOTE: The "Default Settings" sub-menu allows you to create parameters for all your outbound campaigns, applied by default.

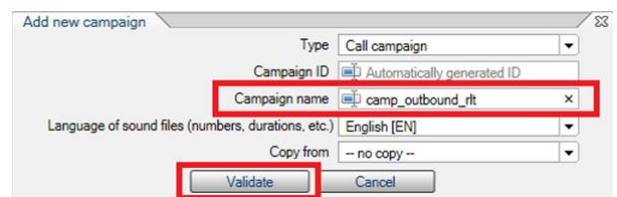


Click on the « **outbound media** » menu, and select « **campaigns configuration** » :

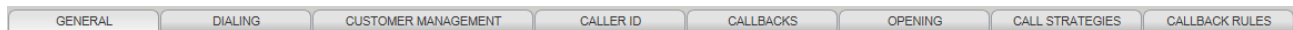
Click on « **Add new** »  to create a new campaign.



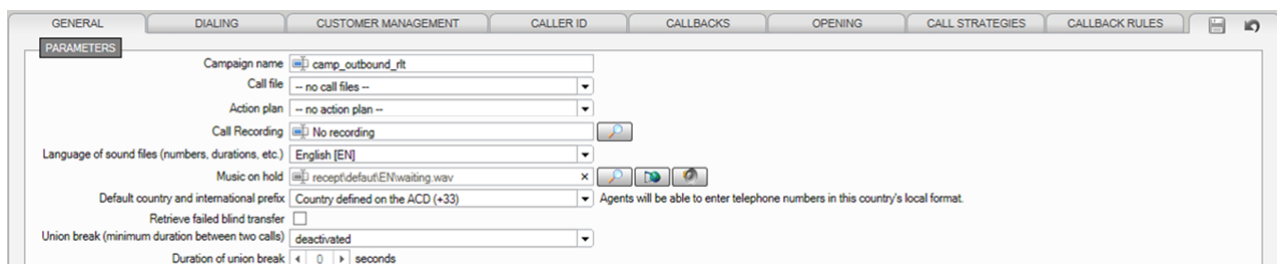
It triggers the display of a popup. Enter type & name of the campaign, and then click on « **Validate** ».



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



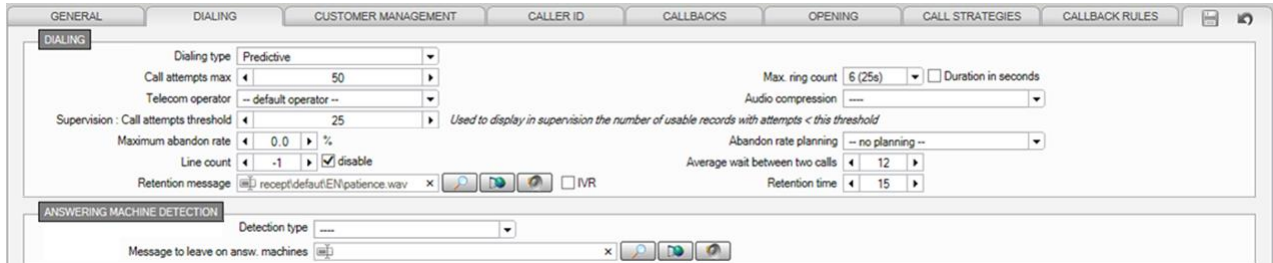
Under the « **General** » tab, you can now set up:





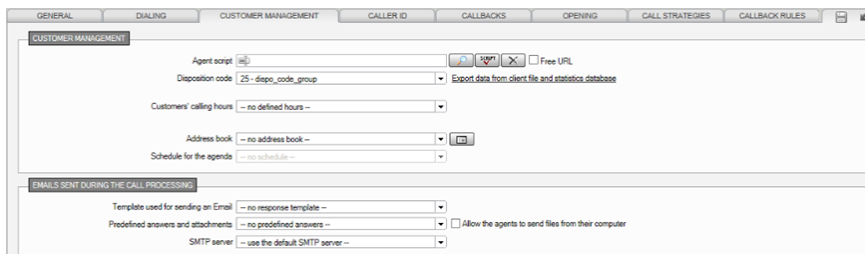
- ✓ The **on hold music** you like
- ✓ **Display to prospect** : number displayed on prospect’s phone when the system calls him
- ✓ **Callback deadline** : the general rules that apply to agents when creating callback reminders about this campaign
- ✓ **Break inter-calls** : if your country has a specific regulation

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



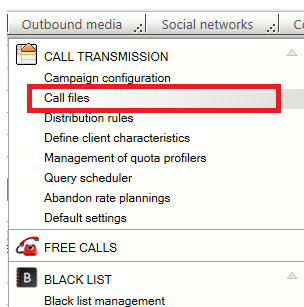
- ✓ The **call type** you want
- ✓ The number of **call attempts** on a given phone number
- ✓ The **maximum ring number**
- ✓ The **parameters of the call type** as explained during training
- ✓ The **answering machine detection** strategy
- ✓ The **call strategy** you want on the campaign

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



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

4.2 CREATE YOUR CALL FILE AND INJECT YOUR DATA FROM YOUR SOURCE FILE

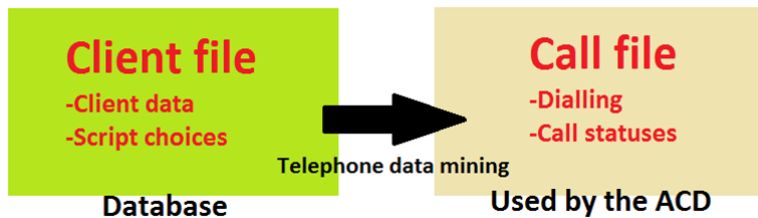


Click on the « **Outbound media** » menu, and select « **Call files** ».

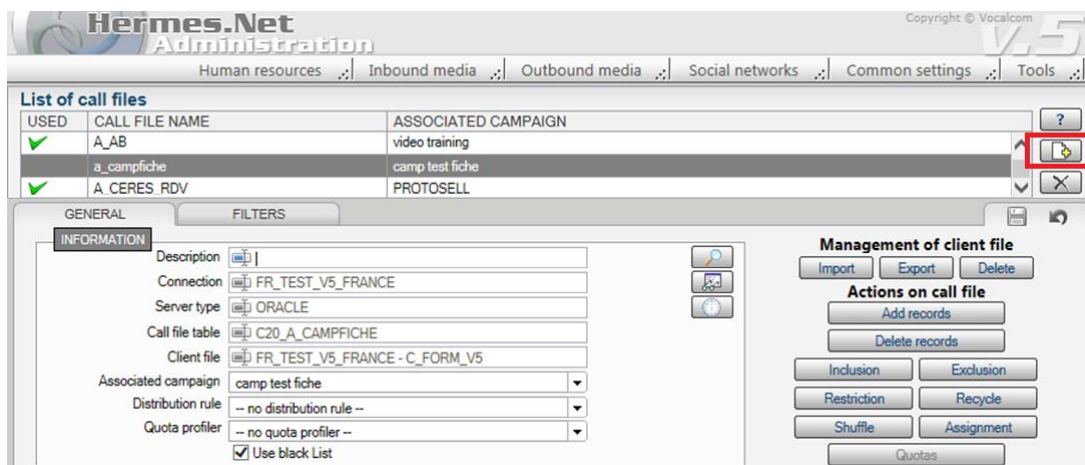


We created the basis of our **client file** in the Interface Designer module, and we now have to inject data in it from a source file (ex: Excel file, etc...). From this client file, the system will create a second file, called the **Call file**, which will be used by the ACD for dialing and keeping the call status records.

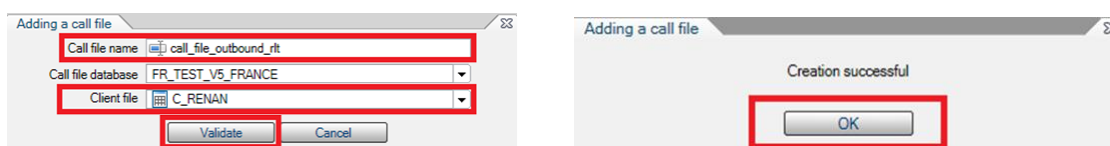
When we export the data, it will be possible to merge the two files to create a unique file containing data from both. The connection between the two files is made with the **index** (1st client on the client file will be the 1st client on the call file).



Click on « **Add new** » to create a call file:



Type the **call file** name, and select the **correct database & client file**, as created in the script designer.



NOTE: It is important to give your file a name that you will easily recognize later, especially if you need to have several running campaigns in the future.

Under the « **General** » tab, select under « **Associated campaign** » the name of the campaign you have created, and click on the **Disk** button to save.



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

List of call files

USED	CALL FILE NAME	ASSOCIATED CAMPAIGN
	Call_file_1	Campaign test
	call_file_out	
✓	FA	Emmanuel Campagne Test

GENERAL * FILTERS

INFORMATION

Description: []
 Connection: FR_TEST_V5_FRANCE
 Server type: ORACLE
 Call file table: C20_CALL_FILE_OUT
 Client file: FR_TEST_V5_FRANCE - C_RENAN
 Associated campaign: -- no linked campaigns --
 Distribution rule: Kevin1, Kevin2
 Quota profiler: test_manual_rt, camp_outbound_rt, AUTOMATE_APPEL

Management of client file
 Import | Export | Delete

Actions on call file
 Add records | Delete records
 Inclusion | Exclusion
 Restriction | Recycle
 Shuffle | Assignment
 Quotas

Management of client file

Import | Export | Delete

Actions on call file
 Add records | Delete records
 Inclusion | Exclusion
 Restriction | Recycle
 Shuffle | Assignment
 Quotas

Under « **Client file management** », click on « **Import** » to trigger the wizard.

In « **Data source type** », select the file format of your source file, and then search for your file. When you get the overview, click on « **NEXT** » to go to the next stage. The wizard page « **IMPORTING TO A CLIENT FILE** » opens.

Hermes.Net Wizards Call file : call_file_out

1 | 2 | 3 | 4 | 5

SELECT A DATA SOURCE TO IMPORT

Supplier: Excel 5.0 (*.xlsx) file | File: source.xlsx

DATA SOURCE PARAMETERS
 Sheet: Feuil1 | First line contains column names:

OVERVIEW OF THE SOURCE NUMBER OF RECORDS TO BE IMPORTED : 52

NAME	TELEPHONE	CITY
adam	123456789	Paris
bob	123456789	Lyon
patrick	123456789	Brest

Data source selection

You can create a filter on the data source. When you're done or if it's not necessary, click on « **NEXT** ».

Hermes.Net Wizards Call file : call_file_out

1 | 2 | 3 | 4 | 5

CREATE A FILTER
 No filter currently defined. | Add a filter

OVERVIEW OF THE SOURCE NUMBER OF RECORDS TO BE IMPORTED : 52

NAME	TELEPHONE	CITY
adam	123456789	Paris
bob	123456789	Lyon
sean	123456789	Caen

Add a filter to the data to be imported

At this stage, **you map your source file with your client file**. The « **Automatic match** » button helps you by doing an automatic mapping when possible. You can also **remove duplicates**, and for telephones, specify a **format**, its length, and **add a 0 if needed**. When you're done, click on « **NEXT** ».



IMPORTING TO A CLIENT FILE **Hermes.Net** Call file : call_file_out
Wizards

SELECTION OF FIELDS TO IMPORT. Automatic match

Unaffected values	Destination	Source	Remove duplicates	Format
CITY	INDICE	- auto-incremented value -	<input checked="" type="checkbox"/>	Numeric value
NAME	GUID_CONTACT_ID	- not completed -	<input type="checkbox"/>	- no verification -
TELEPHONE	TEST	- not completed -	<input type="checkbox"/>	- no verification -
	123	- not completed -	<input type="checkbox"/>	- no verification -
	456	- not completed -	<input type="checkbox"/>	- no verification -
	789	- not completed -	<input type="checkbox"/>	- no verification -
	abc	- not completed -	<input type="checkbox"/>	- no verification -

OVERVIEW OF THE SOURCE NUMBER OF RECORDS TO BE IMPORTED : 52

NAME	TELEPHONE	CITY
bob	123456789	Lyon
chris	123456789	Bordeaux
mark	123456789	Pau

Data mapping

IMPORTING TO A CLIENT FILE **Hermes.Net** Call file : call_file_out
Wizards

SELECTION OF FIELDS TO IMPORT. Automatic match

Unaffected values	Destination	Source	Remove duplicates	Format
CITY	INDICE	- auto-incremented value -	<input checked="" type="checkbox"/>	Numeric value
TELEPHONE	GUID_CONTACT_ID	- not completed -	<input type="checkbox"/>	- no verification -
	TEST	NAME	<input type="checkbox"/>	- no verification -
	123	- not completed -	<input type="checkbox"/>	- no verification -
	456	- not completed -	<input type="checkbox"/>	- no verification -
	789	- not completed -	<input type="checkbox"/>	- no verification -

OVERVIEW OF THE SOURCE NUMBER OF RECORDS TO BE IMPORTED : 52

NAME	TELEPHONE	CITY
bob	123456789	Lyon
chris	123456789	Bordeaux
mark	123456789	Pau

Data mapping

IMPORTING TO A CLIENT FILE **Hermes.Net** Call file : call_file_out
Wizards

SELECTION OF FIELDS TO IMPORT. Automatic match

Unaffected values	Destination	Source	Remove duplicates	Format
CITY	INDICE	- auto-incremented value -	<input checked="" type="checkbox"/>	Numeric value
	GUID_CONTACT_ID	- not completed -	<input type="checkbox"/>	- no verification -
	TEST	NAME	<input type="checkbox"/>	- no verification -
	123	TELEPHONE	<input type="checkbox"/>	- no verification -
	456	- not completed -	<input type="checkbox"/>	- no verification -
	789	- not completed -	<input type="checkbox"/>	- no verification -

OVERVIEW OF THE SOURCE NUMBER OF RECORDS TO BE IMPORTED : 52

NAME	TELEPHONE	CITY
bob	123456789	Lyon
chris	123456789	Bordeaux
mark	123456789	Pau

Data mapping



IMPORTING TO A CLIENT FILE **Hermes.Net** Call file : call_file_out
Wizards

SELECTION OF FIELDS TO IMPORT. Automatic match

Destination	Source	Remove duplicates	Format
INDICE	- auto-incremented value -	<input checked="" type="checkbox"/>	Numeric value
GUID_CONTACT_ID	- not completed -	<input type="checkbox"/>	- no verification -
TEST	NAME	<input type="checkbox"/>	- no verification -
123	TELEPHONE	<input type="checkbox"/>	- no verification -
456	CITY	<input type="checkbox"/>	- no verification -
789	- not completed -	<input type="checkbox"/>	- no verification -

OVERVIEW OF THE SOURCE NUMBER OF RECORDS TO BE IMPORTED : 52

NAME	TELEPHONE	CITY
bob	123456789	Lyon
chris	123456789	Bordeaux
mark	123456789	Pau

Data mapping

IMPORTING TO A CLIENT FILE **Hermes.Net** Call file : call_file_out
Wizards

SUMMARY OF DATA TO BE IMPORTED
All records are valid and will be imported.

SUMMARY OF SELECTED MAPPING
Destination : Source
TEST : NAME
123 : TELEPHONE
456 : CITY

OVERVIEW OF THE SOURCE NUMBER OF RECORDS TO BE IMPORTED : 52

NAME	TELEPHONE	CITY
bob	123456789	Lyon
chris	123456789	Bordeaux
nathan	123456789	La Rochelle

Summary before importing

IMPORTING TO A CLIENT FILE **Hermes.Net** Call file : call_file_out
Wizards

IMPORT RESULTS
All records were successfully imported.

SUMMARY OF SELECTED MAPPING
Destination : Source
TEST : NAME
123 : TELEPHONE
456 : CITY

OVERVIEW OF THE SOURCE NUMBER OF RECORDS TO BE IMPORTED : 52

NAME	TELEPHONE	CITY
bob	123456789	Lyon
chris	123456789	Bordeaux
nathan	123456789	La Rochelle

Report

Client file is now full. You will now export the telephone data into the call file. Click on « **NEXT** » to import into call file. The wizard page « **IMPORTING TO A CALL FILE** » opens. At this stage, if you want to, you can create a filter on the call file. When you're done or if it's not necessary, click on « **NEXT** ».



NAME	TELEPHONE	CITY
bob	123456789	Lyon
chris	123456789	Bordeaux
tim	123456789	Amiens

At this stage, **you map your client file and your call file**. This step is similar to the one done for the client file. When you're done, click on « **NEXT** ».

Destination	Source	Remove duplicates	Format
Customer time zone	- detect from telephone numbers	<input type="checkbox"/>	- no verification -
Telephone number 1	- not completed -	<input type="checkbox"/>	National telephone number
Telephone number 2	- not completed -	<input type="checkbox"/>	Telephone number
Telephone number 3	- not completed -	<input type="checkbox"/>	Telephone number

NAME	TELEPHONE	CITY
bob	123456789	Lyon
chris	123456789	Bordeaux
earl	123456789	Marseille

Destination	Source	Remove duplicates	Format
Call index	- auto-incremented value -	<input checked="" type="checkbox"/>	Numeric value
Memo (part 1)	- not completed -	<input type="checkbox"/>	- no verification -
Memo (part 2)	- not completed -	<input type="checkbox"/>	- no verification -
Memo (part 3)	- not completed -	<input type="checkbox"/>	- no verification -

NAME	TELEPHONE	CITY
bob	123456789	Lyon
chris	123456789	Bordeaux
jo	123456789	Dijon

You can also import extra data in the call file as memo. When you're done, click on « **NEXT** ».



IMPORTING TO A CALL FILE Call file : call_file_out

Hermes.Net Wizard

SELECTION OF OTHER FIELDS TO BE IMPORTED

Unaffected values

Destination	Source	Remove duplicates	Format
Call index	- auto-incremented value -	<input checked="" type="checkbox"/>	Numeric value
Memo (part 1)	NAME		- no verification -
Memo (part 2)	CITY		- no verification -
Memo (part 3)	- not completed -		- no verification -

Memo separator [] ('space' character by default).
 Schedule a callback for new imported records
 Exclude the new imported records

OVERVIEW OF THE SOURCE NUMBER OF RECORDS TO BE IMPORTED : 52

NAME	TELEPHONE	CITY
bob	123456789	Lyon
chris	123456789	Bordeaux
jo	123456789	Dijon

▶

IMPORTING TO A CALL FILE Call file : call_file_out

Hermes.Net Wizard

SUMMARY OF DATA TO BE IMPORTED

All records are valid and will be imported.

SUMMARY OF SELECTED MAPPING

Destination : Source
 Telephone number 1 : TELEPHONE
 Memo field : NAME + * + CITY

OVERVIEW OF THE SOURCE NUMBER OF RECORDS TO BE IMPORTED : 52

NAME	TELEPHONE	CITY
bob	123456789	Lyon
chris	123456789	Bordeaux
oliver	123456789	Poitiers

▶

Your call file is nearly done. Click on « NEXT » to finish the export of data.

IMPORTING TO A CALL FILE Call file : call_file_out

Hermes.Net Wizard

IMPORT RESULTS

All records were successfully imported.

SUMMARY OF SELECTED MAPPING

Destination : Source
 Telephone number 1 : TELEPHONE
 Memo field : NAME + * + CITY

OVERVIEW OF THE SOURCE NUMBER OF RECORDS TO BE IMPORTED : 52

NAME	TELEPHONE	CITY
bob	123456789	Lyon
chris	123456789	Bordeaux
oliver	123456789	Poitiers

▶

Both the client file and the call file are full. You can close the window and using the loop button, you'll be able to see how many files have been imported:

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List of call files

USED	CALL FILE NAME	ASSOCIATED CAMPAIGN
	Call_file_1	Campaign test
	call_file_out	camp_outbound_rt
<input checked="" type="checkbox"/>	FA	Emmanuel Campagne Test

GENERAL FILTERS

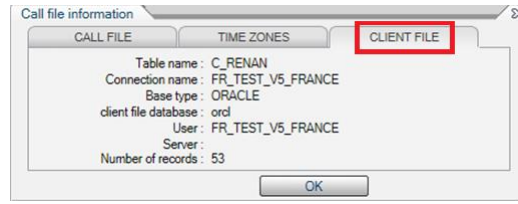
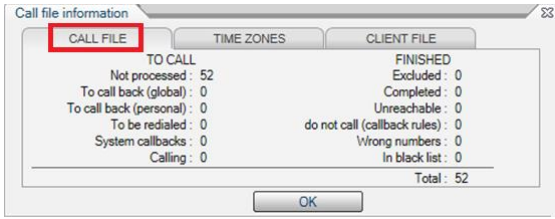
INFORMATION

Description []
 Connection [FR_TEST_V5_FRANCE]
 Server type [ORACLE]
 Call file table [C20_CALL_FILE_OUT]
 Client file [FR_TEST_V5_FRANCE - C_RENAN]
 Associated campaign [camp_outbound_rt]
 Distribution rule [-- no distribution rule --]
 Quota profiler [-- no quota profiler --]
 Use black List

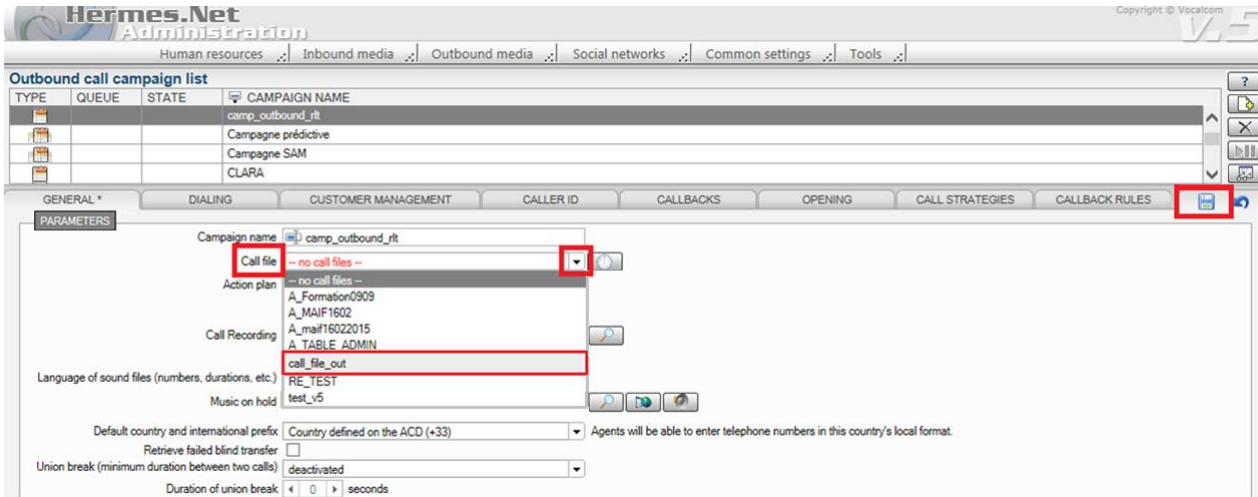
▶

Management of client file
 Import | Export | Delete

Actions on call file
 Add records
 Delete records
 Inclusion | Exclusion
 Restriction | Recycle
 Shuffle | Assignment
 Quotas



Save, go back to your campaign, and under the « **General** » tab, select your newly created call file:



5 REQUIRED COMMON FEATURES

5.1 CREATE 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 YOUR ADDRESS BOOK

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

6.2 CREATE CALLBACK RULES



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

6.3 CREATE SERVICE HOURS & HOLIDAYS PLAN

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

7 OPTIONAL COMMON FEATURES

7.1 ADD SKILLS

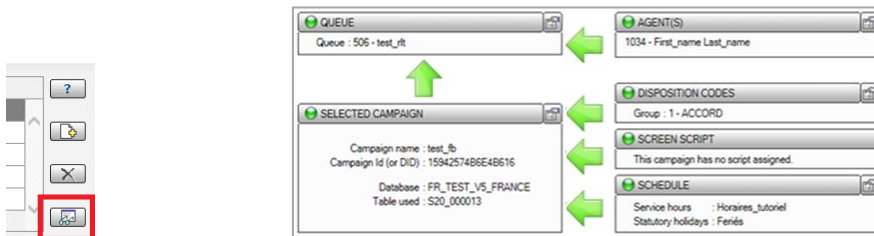
Please refer to the document « **Common features – Skills.doc** ».

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:



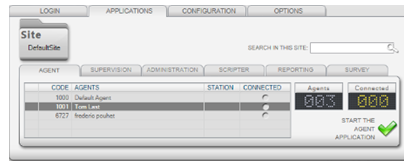
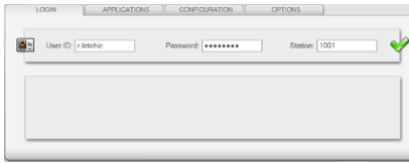
- A green dot means the element is set up correctly.
- An orange dot means that alerts have been detected. The campaign could be started, but maybe won't work correctly.
- A red dot means that alerts have been detected. The campaign won't work at all.

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

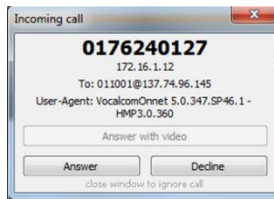
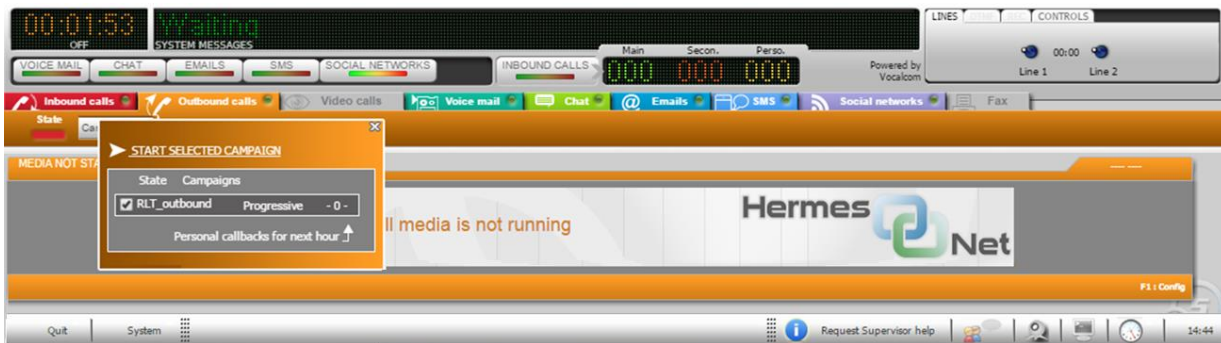


9 TEST AS AN AGENT

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



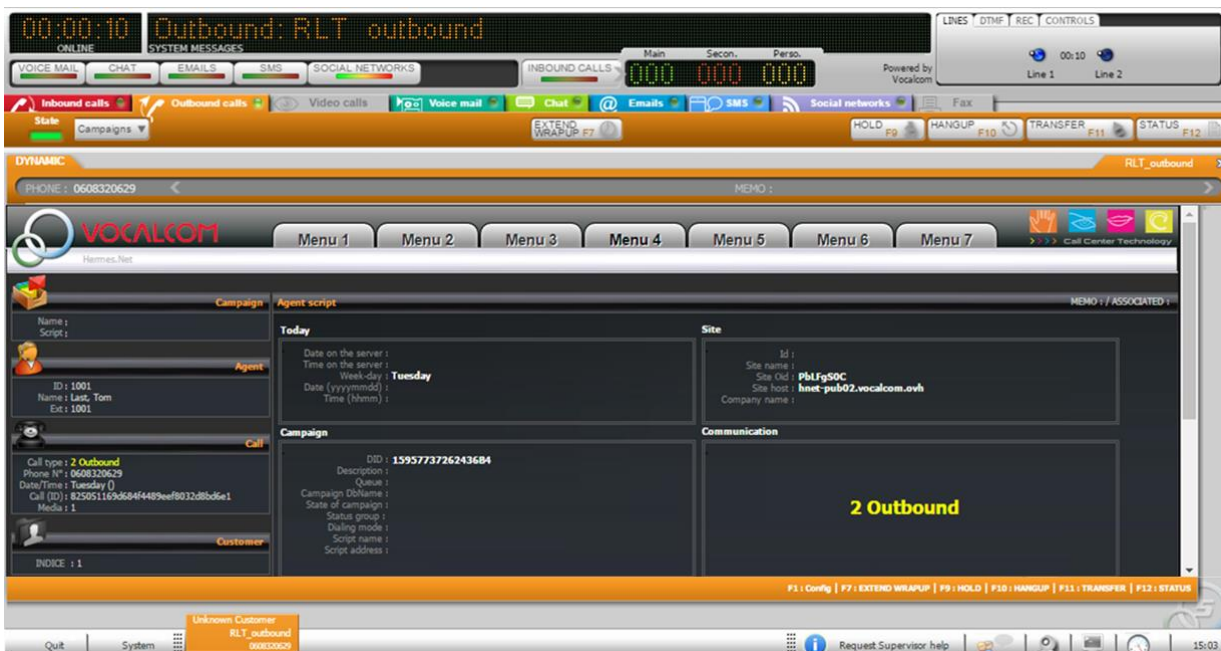
The agent starts the outbound campaign.



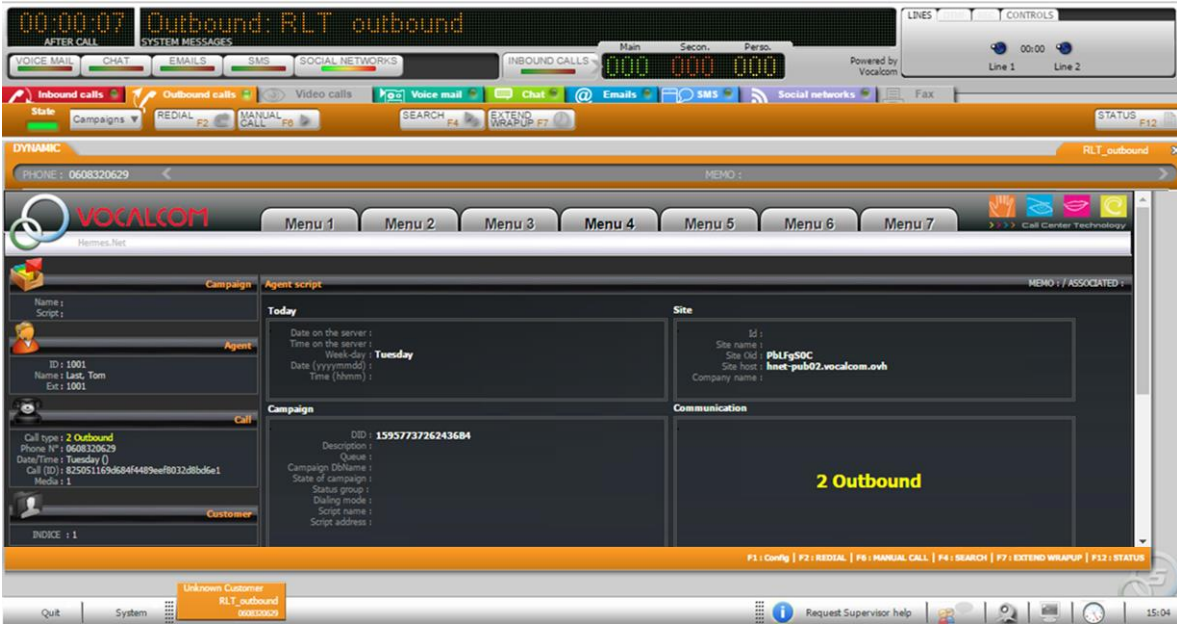
The system calls the agent

The agent clicks on the « Answer » button.

The agent is now connected, Hermes starts dialing the first number in the call file. When the client picks up the phone call, Hermes connects him with the agent, whose status turns to « Online ».



When the client hangs up the phone, the agent's status turns to « After call ».



The agent qualifies the call, so that Hermes can close the client's record.

The client's record closes, the agent is now ready to receive the next call (2nd client in the call file).

