

HERMES.NET V5
Documentation

Campaign Administration

WebChat

User Manual



| | | | |
|-----------------|-------------|-------------------------|-----------------|
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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 WebChat 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 **WebChat campaigns** at an operational level.

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REVISIONS HISTORY

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REFERENCE DOCUMENT

| Document version | Date | Revision Description |
|-------------------|------|----------------------|
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| Manager Dashboard | | |

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TABLE OF CONTENTS

- 1 WHAT IS THIS DOCUMENT ? 1
- 2 STEP BY STEP..... 1
- 3 WHAT TO DO IN THE ADMINISTRATION MODULE ?..... 1
 - 3.1 Initialize the campaign in Hermes 1
 - 3.2 Create the Web campaign in the wizard 2
 - 3.3 Publish the chat interface on web site pages..... 3
 - 3.4 Assign agents to the campaign 5
- 4 REQUIRED COMMON FEATURES..... 8
 - 4.1 Create Agent Workspace 8
- 5 RECOMMENDED COMMON FEATURES 9
 - 5.1 Activate Parameters for Form Publishing..... 9
 - 5.2 Activate Parameters for Callback 10
 - 5.3 Activate Parameters for Proactive Chat 10
 - 5.4 Activate Parameters for Automatic Call 11
 - 5.5 Create or assign Service Hours & Holidays Plan 11
 - 5.6 Create or assign Disposition Codes 11
- 6 OPTIONAL COMMON FEATURES 12
 - 6.1 Add Skills..... 12
 - 6.2 Add Predefined Answers & Attachments..... 12
 - 6.3 Add a Survey 12
- 7 CHECK THE SUMMARY OF YOUR CAMPAIGN 12
- 8 TEST AS AN AGENT 13

1 WHAT IS THIS DOCUMENT ?

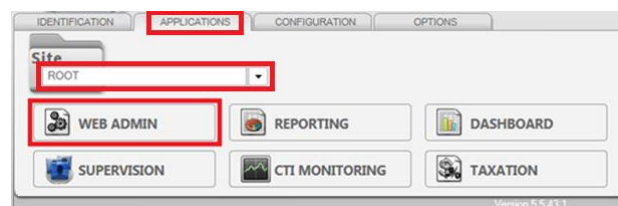
The aim of this document is to explain how to create and install step by step a Web Chat campaign on Hermes Net, with screenshots and shorts instructions.

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.

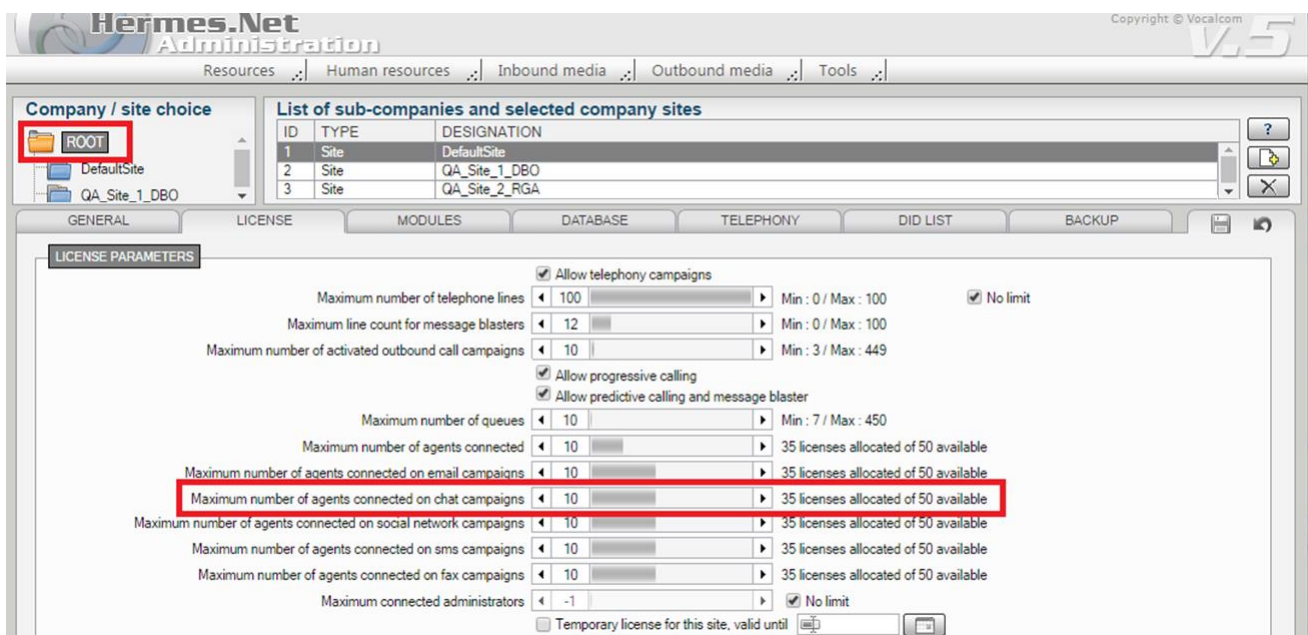
3 WHAT TO DO IN THE ADMINISTRATION MODULE ?

3.1 INITIALIZE THE CAMPAIGN IN HERMES



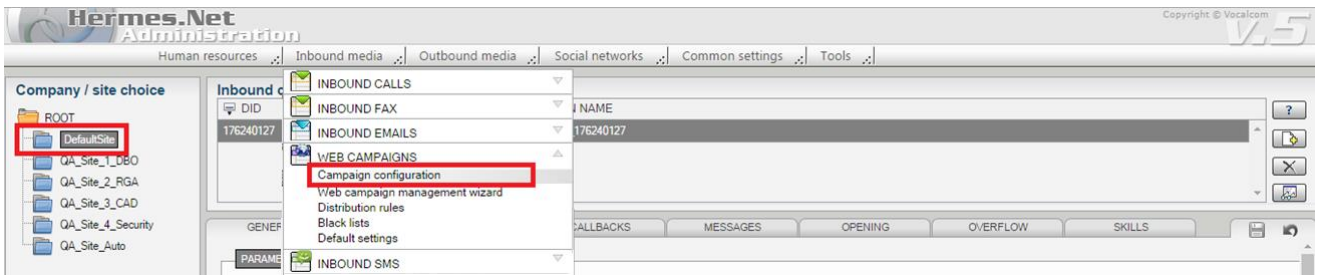
First of all, one must connect to ROOT.

In order to give his rights to the agent, you select the site (eg, here, "DefaultSite"). In the « **license** » tab, add « **+1** » to the value of the field « **maximum number of agents connected on chat campaigns** », and then click on « **Save** » .

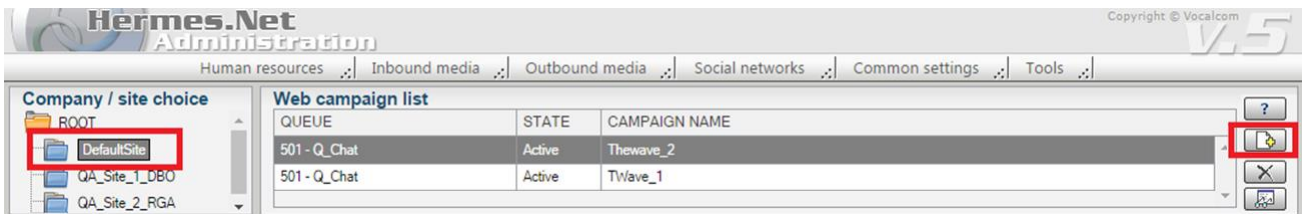




On the site « **DefaultSite** », in the « **Inbound media** » menu, « **Web campaigns** » sub-menu, select « **Campaign configuration** ».

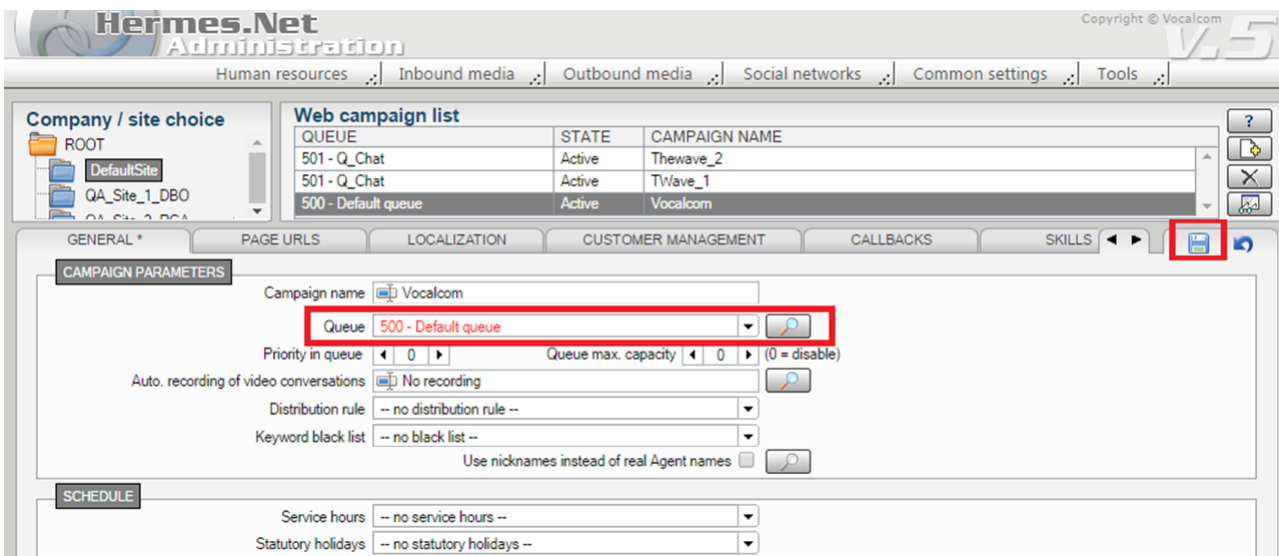


Click on « + » in the « **Campaigns list** ». It triggers the display of a popup.



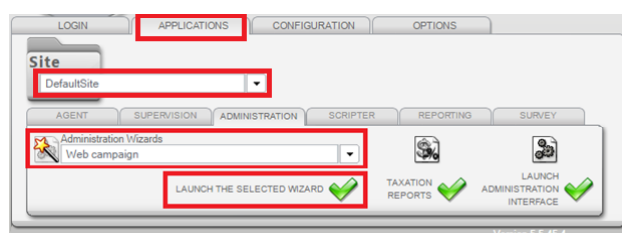
In the popup, enter the « **Web site name** » and « **Web site URL** » on which you want to display the chat interface, and the database (here, "QA_DefaultSite"), and then click on « **Validate** ».

The campaign is created, its state is "inactive". Select the « **Queue** » and the click on « **Save** ».



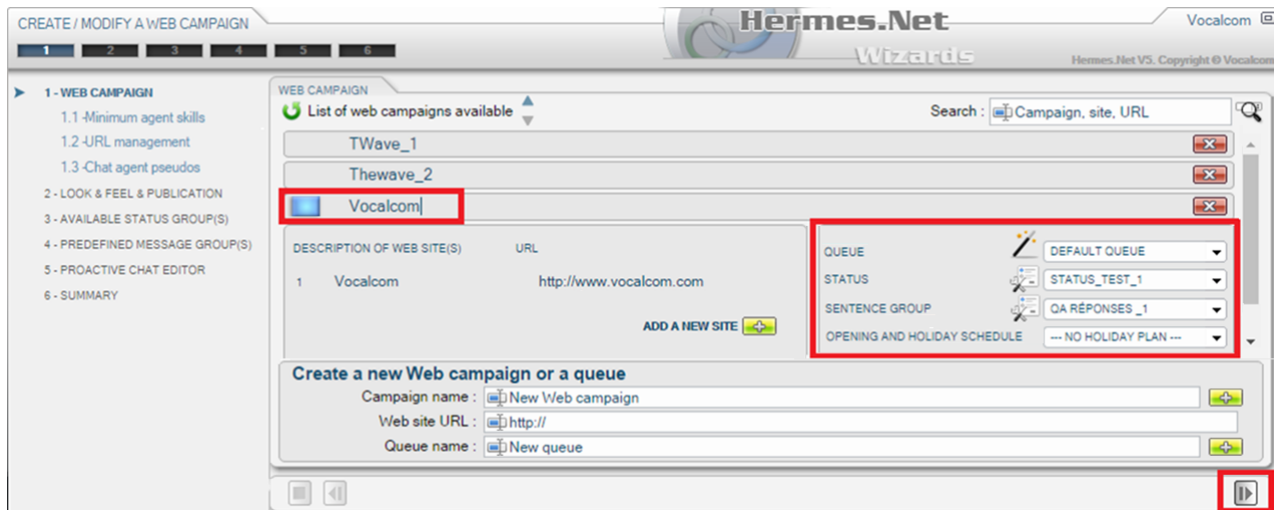
3.2 CREATE THE WEB CAMPAIGN IN THE WIZARD

On the connection screen, select the site on the « **Application** » tab, then select the « **Web campaign** » wizard in the « **Administration** » sub-tab, and click on « **Launch the selected wizard** ».





In the upper section, select the web campaign on which you want to use the chat. In the right-side section, fill in all appropriate fields and then click on « Next » .



According to your needs, complete the wizard pages :

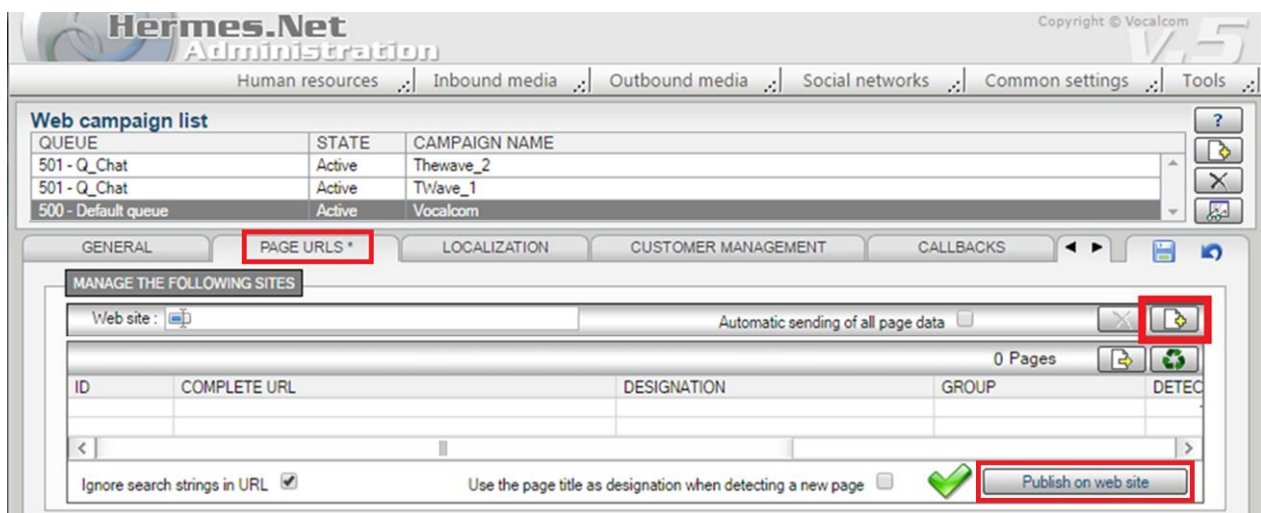
- « 2 – look & feel & publication »,
- « 3 – available status group »,
- « 4 – predefined message group »,
- « 5 – proactive chat editor ».



Then, check your parameters in the screen « 6 – summary », save and exit the wizard.

3.3 PUBLISH THE CHAT INTERFACE ON WEB SITE PAGES

Launch the Administration interface. In the « Inbound media » menu, « Web campaigns » section, select « Campaign configuration ».



On the « Page URLs » tab, click on « + » . It triggers the display of a popup.



Add/modify web site

URL

Description

Enter the URL of the web page on which you want to activate the Chat interface, and then click on « **Validate** ». to close the popup.

Back on the « **Page URLs** » tab of the « **Web campaign list** » screen, click on the button « **Publish on web site** », in order to visualize the chat interface.

Publish on web site

TEMPLATE PERSONALIZATION VIDEO CONFERENCE INFORMATIONS SKIN

Enable new interface

Use the viewport meta tag

Send emails to campaign -- no linked campaigns --

CC emails to following addresses

Use protocol Auto detect

This site uses several sub-domains in the same domain

Optimize the loading of images using all publishing platforms with a public address

Add this code string to all html pages of the web site (just before </body> tag):

```
<script type="text/javascript" src="//hnet-pub02.vocalcom.ovh/hermes_net_v5/PlatformPublication/WebSitesLiveChat/Commun/TheWave/0526C46476350334_QQGcIAEK/loaderthenevwave.aspx?id=newloaderthenevwave?></script>
```

Information for integration: Unique ID of the campaign: QQGcID4K Copy to clipboard

Unique ID of the site: QQGcIAEK

Add the code string to html pages of the web site, just before </body/> tag. You can customize the Chat interface on « **Personalization** », « **Video conference** », « **Informations** » and « **Skin** » tabs.

TEMPLATE PERSONALIZATION VIDEO CONFERENCE INFORMATIONS SKIN

INTERFACE VISIBILITY

Display interface: Only when an agent is available

Position in relation to the top of the window: 0 px

Reduced interface at startup: Banner open tab:

CHAT REQUESTED BY A WEB SURFER

Allow the chat requests: If agents are connected

Text if agent is closed or no agent available:

Display this button only on proactive chat command:

PROACTIVE CHAT

Display the proactive prompt message in a popup:

Display duration in seconds: -1 (-1 = manual closing)

TELEPHONE CALLBACK

Allow customer to request a callback:

Use the following campaign for the 'click to call' option: inbound_01_176240127 (176240127)

MISCELLANEOUS SETTINGS

Allow co-browsing: Display tooltips:

TEMPLATE PERSONALIZATION VIDEO CONFERENCE

VIDEO CONFERENCE

Activation: Enable upon request

QUALITY CONTROL OF THE VIDEO

Maximum bit rate: 26000 Bytes/second (0 = no limit)

Frame rate: 8

Video quality: 0

SIZE OF THE VIDEO

Width: 320 px

Height: 240 px

TEMPLATE PERSONALIZATION VIDEO CONFERENCE INFORMATIONS

REQUEST INFORMATION

Contact form: Display default contact form

Custom form address:

ADVERTISING PANEL

Page URL:

Page title: 111

Open during page loading:

PERSONALIZATION VIDEO CONFERENCE INFORMATIONS SKIN

SKIN MODE

Upload Css Form

AGENT IMAGE

Available agent image

Unavailable agent image

Chatting agent image

Chatting supervisor image

TEMPLATE

Template

Save the form as a template

FORM

Icons' color: default

Background color of main bar: #808080

Opacity of main bar (between 0 and 1, 0 = transparent, 1 = has not opacity): 1

Radius of main bar's buttons: 20

Background color of Information button in main bar: #ffffff

Background color of Chat button in main bar: #337ab7

Background color of Video conference button in main bar: #5cb85c

Background color of Call me back button in main bar: #0ad4e

Background color of Co-browsing button in main bar: #d9534f

Background color of the panels: #f5f5f5

Border color of the panels: #e5e5e5

Background color of ChatSend button in chat panel: #0ad4e

Background color of ChatQuit button in chat panel: #0ad4e

Background color of CallMeBack button in call me back panel: #5cb85c

Background color of FreeToCall button in call me back panel: #5cb85c

Background color of Send button in information panel: #5cb85c

Background color of Start button in video conference panel: #0ad4e

Background color of message chat bubble from surfer: #f5f5f5

Border color of message chat bubble for surfer: #dddddd

Background color of message chat bubble from agent: #f9edf7

Border color of message chat bubble from agent: #bce8f1

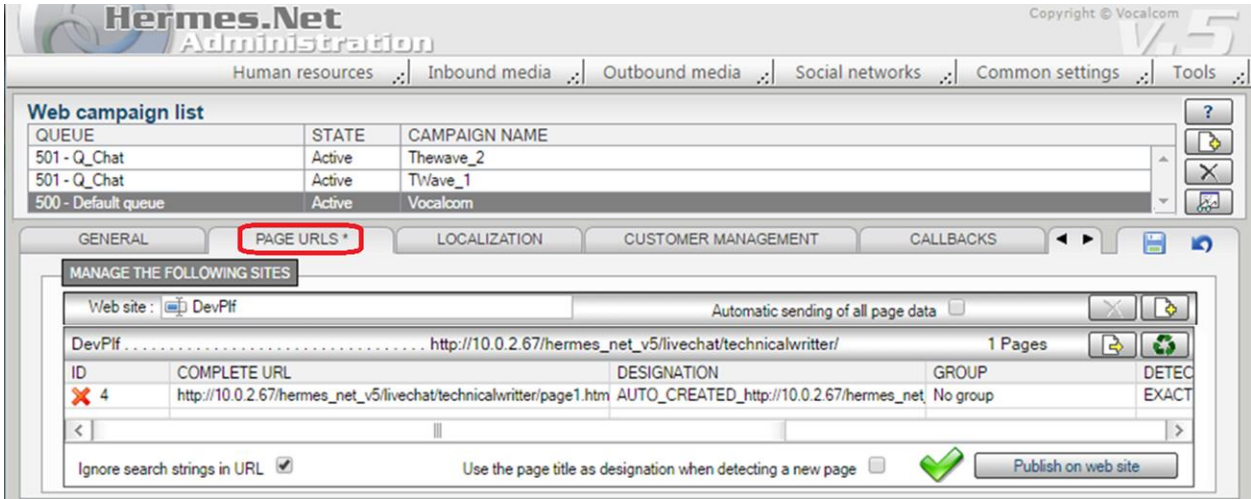
Background color of message chat bubble from supervisor: #f9f2f6

Border color of message chat bubble from supervisor: #f7e6ef

Font color of message in chat bubble: #777777

Font size of message in chat bubble: 12

Once your parameters are set, click on « **Publish** ». The web page now appears in the list.

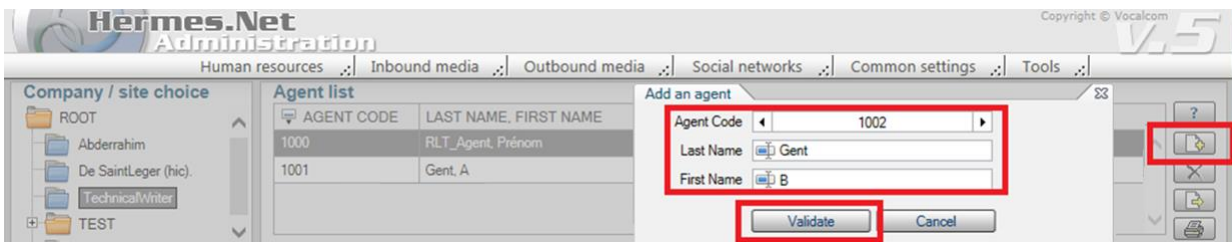


3.4 ASSIGN AGENTS TO THE CAMPAIGN

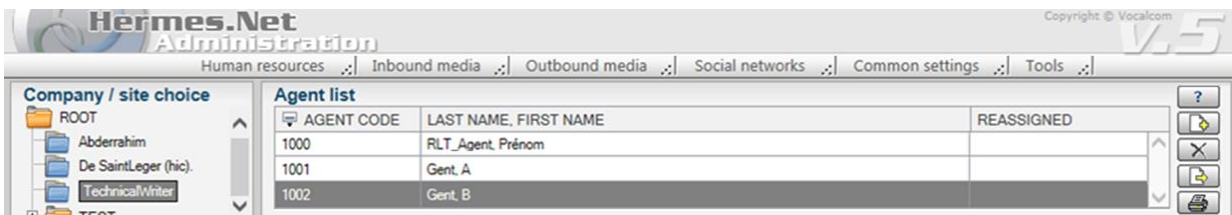


The Web Chat campaign is properly set, one just needs to assign agents to it. To do so, in the « **Human resources** » menu, select « **Agents management** ».

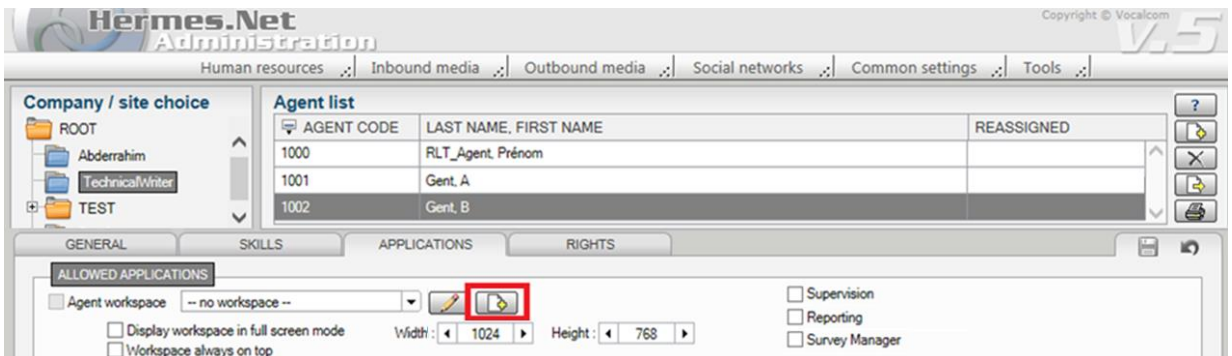
In the list of agents, click on « + » . A popup opens, in which you complete the code, name and first name of the agent, then click on « **Validate** ».



The popup disappears and the newly created agent appears in the list.

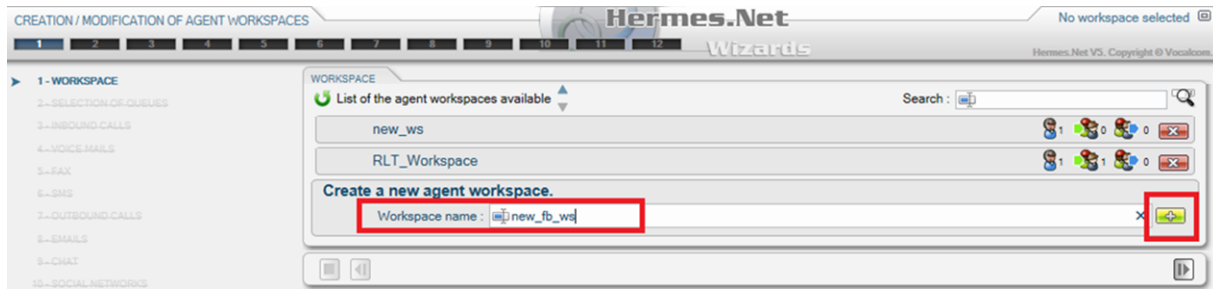


Select the agent. In the « **Applications** » tab, click « + » in front of « **Workspace agent** » field.

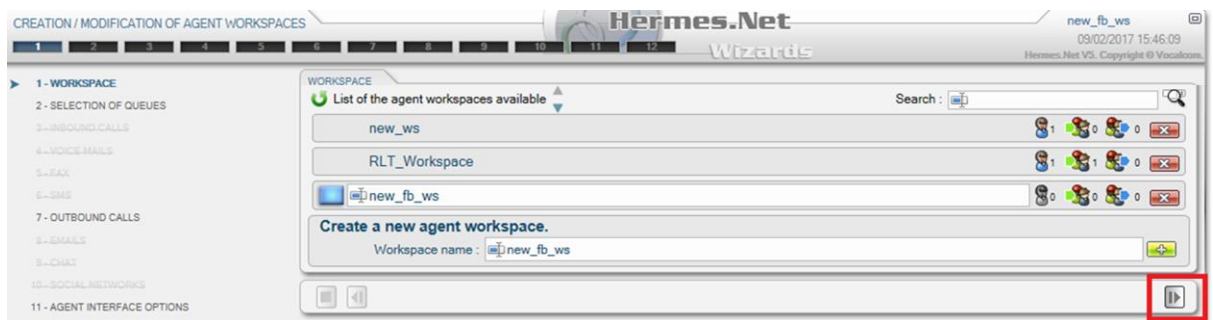




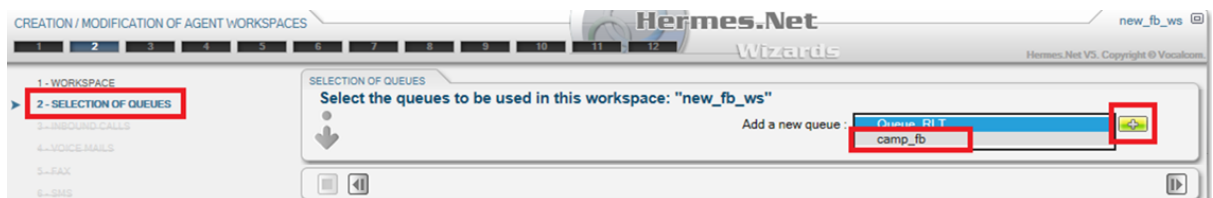
The « **Creation/modification of Agent workspaces** » wizard opens. In the « **Create a new agent workspace** » zone, type in a name and click on « + »



A message displays « **Loading of the agent interface, please wait** ». Then the new agent workspace appears in the list, click « **Next** »



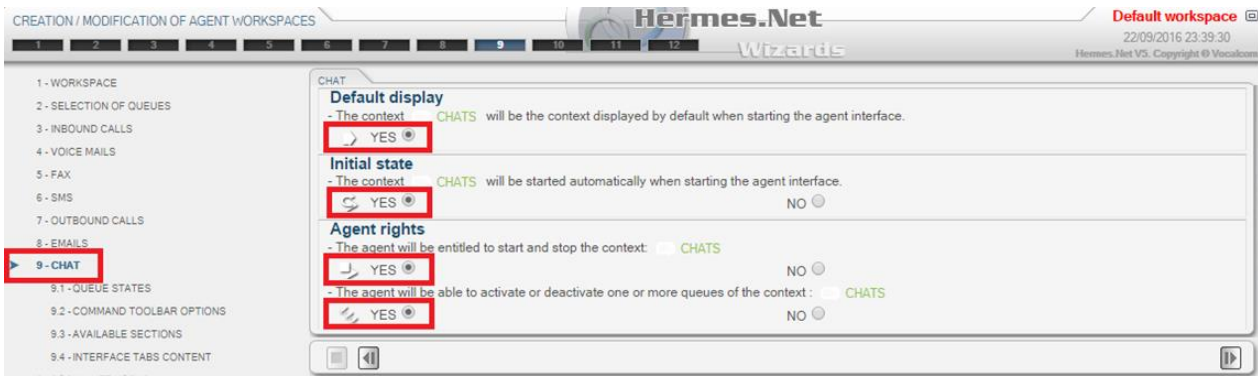
On the second screen of the wizard, « **Selection of queues** », select the newly created queue from the dropdown list « **Add a new queue** », and then click on « + »



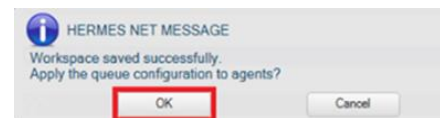
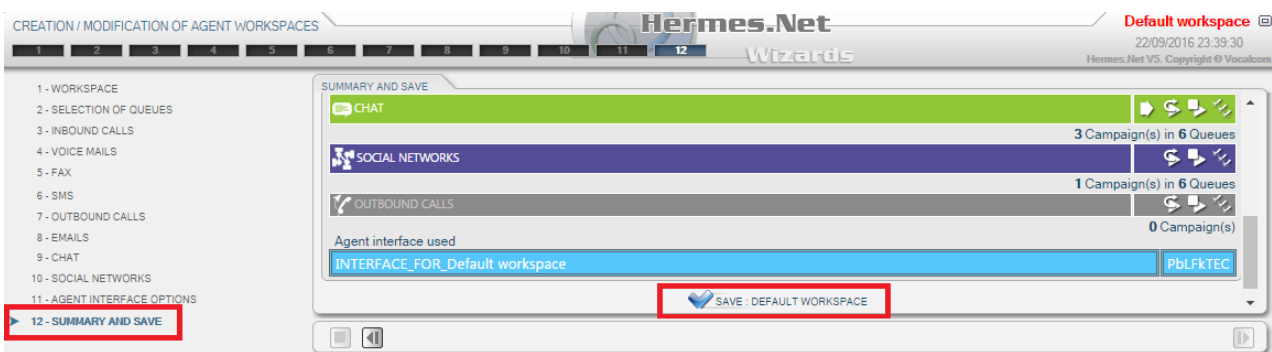
Details appear on the screen : level of the agent in the queue, and delay.



Via the left-side menu, select « **Chat** » and set to « **Yes** » the items « **Default display** », « **Initial state** » and « **Agent rights** » (start/stop the context & activate/deactivate queues).

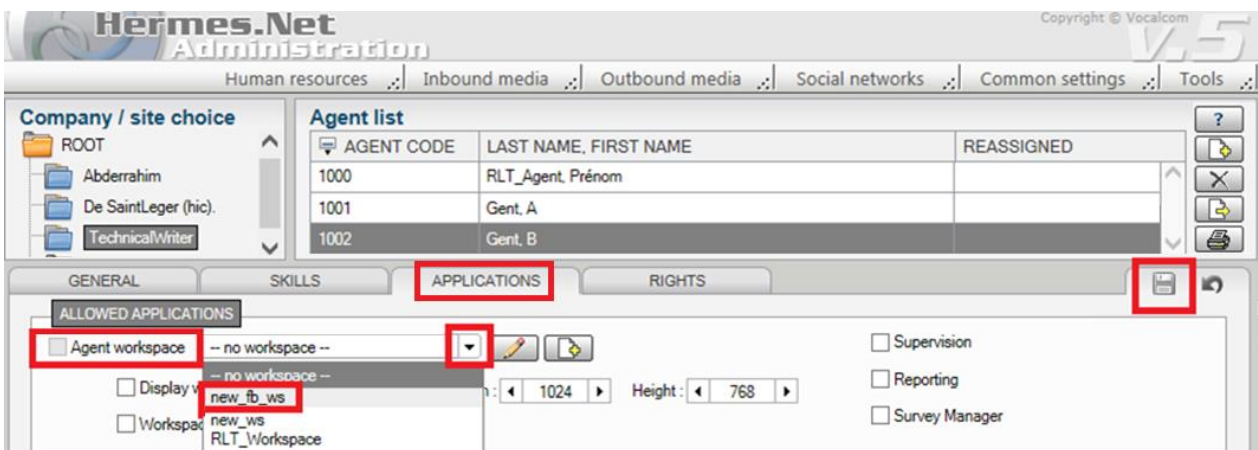




Via the left-side menu, select « **Summary and save** ». After completeness & coherence checks on displayed data, click on « **Save the workspace** ».



Validate the message to apply queue configuration to agents :

Wizard shuts down, sending you back to the « **Human resources / agent management** » screen. In the « **Applications** » tab, select the agent workspace from the dropdown list, and click on « **Save** ».



A new tab appears, called « **Assignment** ». On this tab, select the queue, then click on the icon  to select the medias attached to this queue, and then click on « **Save** » .

Agent list Display only users registered on the domain

| AGENT CODE | LAST NAME, FIRST NAME | REASSIGNED |
|------------|-----------------------|------------|
| 1000 | Agent, Default | |
| 1001 | Last, Tom | ✓ |
| 1002 | abel, | ✓ |
| 1003 | bob, | |

ASSIGNMENT *

| QUEUE | LEVEL | WAITING | AUTO START | OUTBOUND CAMPAIGN | TYPE | AUTO START |
|-----------------------|-------|---------|------------|--------------------------|-----------------|------------|
| ★ ✓ 500 Default queue | 99 | 0 | ☐ ... | Inbound calls campaigns | Predictive | ☐ |
| ★ ✓ 501 Q_Chat | 99 | 0 | ☐ ... | Voice mails campaigns | Manual campaign | ☐ |
| ★ ✓ 502 Q_Email | 99 | 0 | ☐ ... | Emails campaigns | Preview | ☐ |
| ★ ✓ 503 Q_Facebook | 99 | 0 | ☐ ... | Web campaigns | Predictive | ☐ |
| ★ ✓ 504 Q_Twitter | 99 | 0 | ☐ ... | Social network campaigns | Progressive | ☐ |

LEGEND

- ★ ✓ Assignments by default defined in the workspace
- ☐ ✓ Assignments added to the workspace
- ★ ☐ Assignments removed from the workspace

Reset to workspace configuration

Back to the « **Campaigns configuration** » screen, in the header zone, select the campaign and click on the icon in order to check if the campaign is properly created.

Web campaign list

| QUEUE | STATE | CAMPAIGN NAME |
|---------------------|--------|---------------|
| 501 - Q_Chat | Active | Thewave_2 |
| 501 - Q_Chat | Active | TWave_1 |
| 500 - Default queue | Active | Vocalcom |

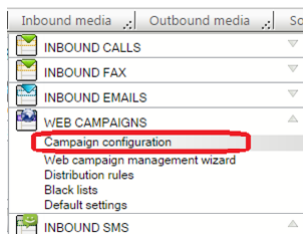
4 REQUIRED COMMON FEATURES

4.1 CREATE AGENT WORKSPACE

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

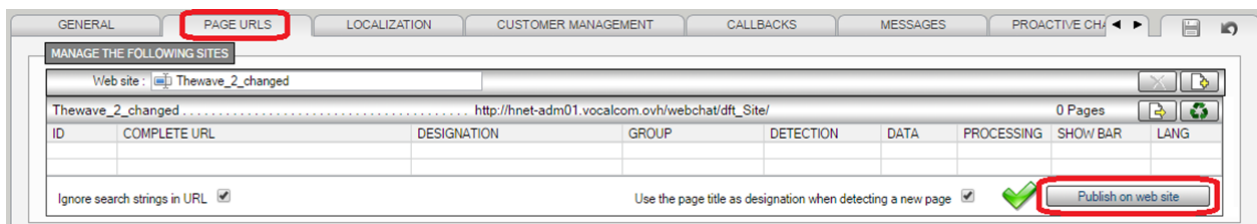
5 RECOMMENDED COMMON FEATURES


5.1 ACTIVATE PARAMETERS FOR FORM PUBLISHING

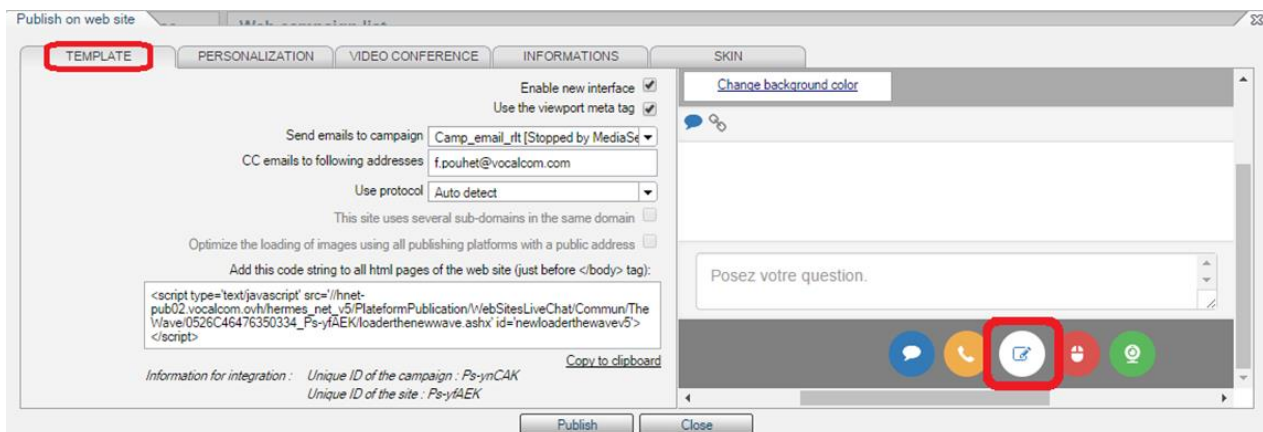


In the « **Inbound media** » menu, « **Web campaigns** » section, select « **Campaign configuration** ».

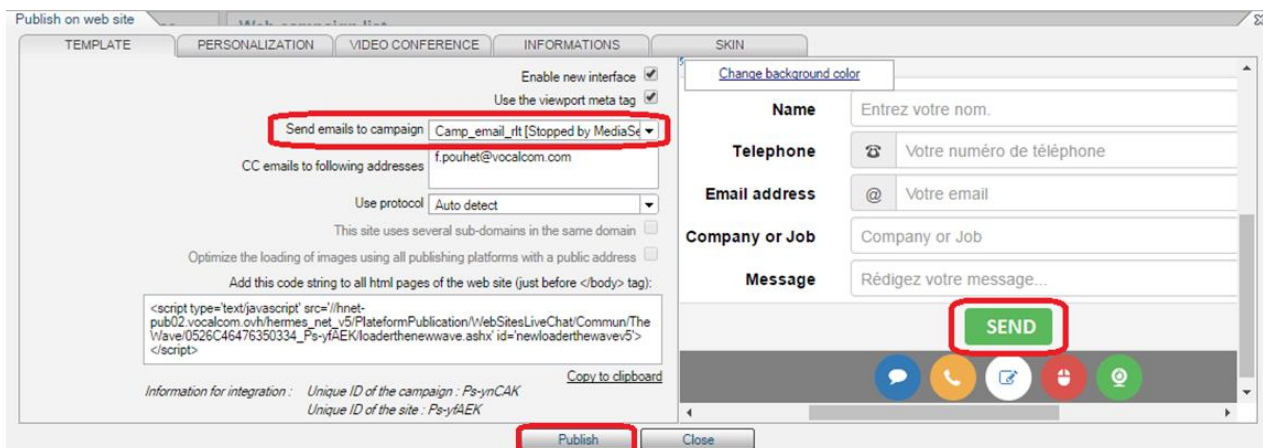
On the « **Web campaign list** » screen, select the « **Page URLs** » tab, and then click on « **Publish on web site** ».



It displays a popup window. Scroll down on the right-side, and click on the « **Edit** » button .



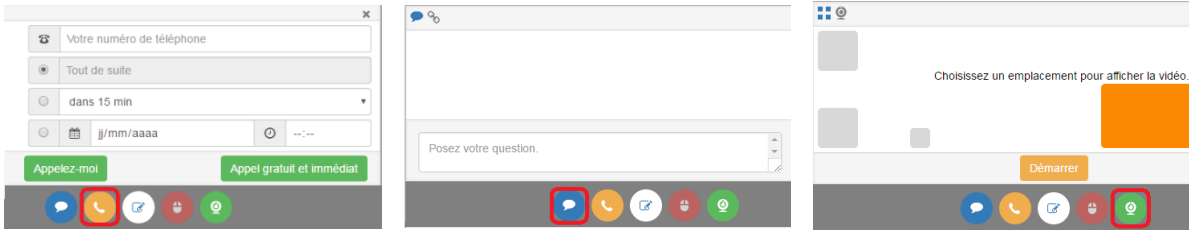
It displays a form, that the client will fill in online. Once completed, the client will click on « **Send** » and the completed form will be sent to an agent, via the specified campaign (*same or e-mail*).



Set the appropriate combination of parameters on the other tabs, and then click on « **Publish** ».



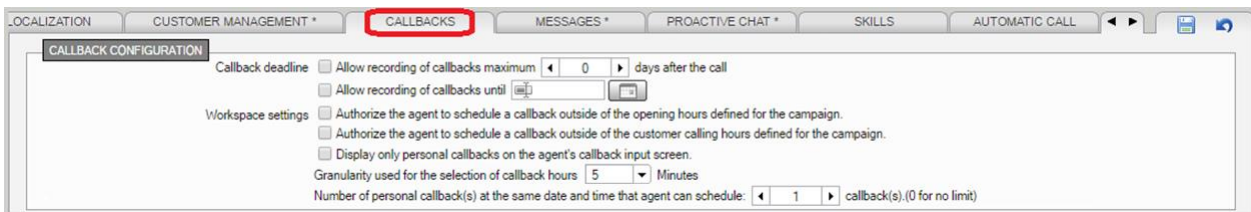
Furthermore, you can define a phone callback form by clicking on the « **Phone** » button . On this form, the client will enter his phone number, and choose whether he wants to call an agent (*right now, for free*) or be called back later (*right now, in 15 minutes, or at a specified date and time*).



You can also adjust the chat form by clicking on the « **Chat** » button , and the webcam form by clicking on the « **Webcam** » button . Remember to click on « **Publish** » when you're done.

5.2 ACTIVATE PARAMETERS FOR CALLBACK

On the « **Callbacks** » tab of the « **Web campaign list** » screen, you can set callbacks parameters.

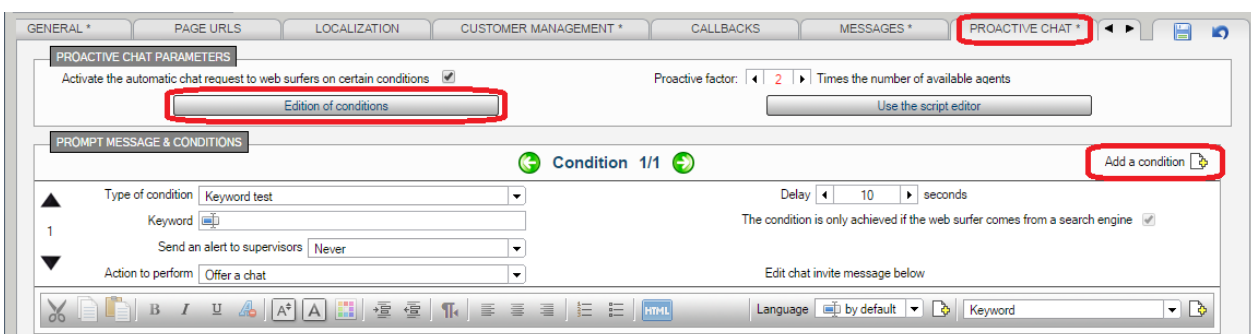


Set parameters to fit your needs, regarding callbacks authorization, scheduling & recording, and then click on « **Save** » .

5.3 ACTIVATE PARAMETERS FOR PROACTIVE CHAT

On the « **Proactive chat** » tab of the « **Web campaign list** » screen, check the box called « **Activate the automatic chat request to web surfers on certain conditions** ». It displays 2 new buttons :

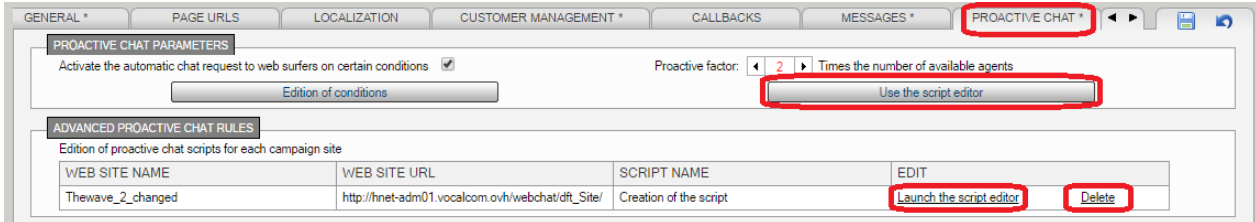
- Clicking on the « **Edition of condition** » button displays the section called « **Prompt Message & Conditions** » in the lower part of the screen.





It displays the conditions for automatic activation of chat requests. Set the parameters to fit your needs, and then click on « Save » . Click on « Add a condition » to add a new condition.

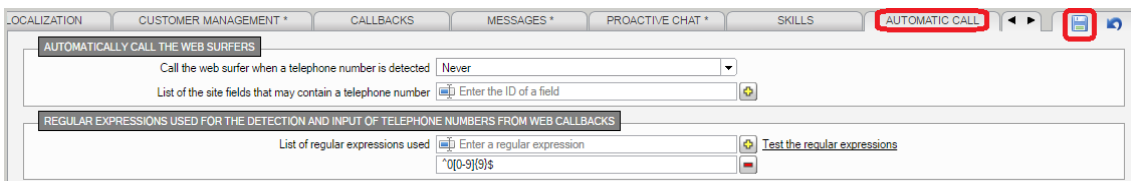
- Clicking on the « Use the script editor » button displays the section called « Advanced Proactive Chat rules » in the lower part of the screen.



It displays the chat scripts for each campaign site (*web site name, web site url, script name*), along with 2 buttons, that allow, either to « Launch the script editor », or « Delete » the script. Click on « Save » when you're done.

5.4 ACTIVATE PARAMETERS FOR AUTOMATIC CALL

On the « Automatic call » tab of the « Web campaign list » screen, you can set parameters to activate automatic phone calls to web surfers, when a telephone number is detected.



In the field « Call the web surfer when a telephone number is detected », you can choose :

- Never,
- If the web surfer chats with an agent,
- If the web surfer does not chat with an agent,
- Always.

In the field « List of the site fields that may contain a telephone number », you can enter the ID of a field, then click on « Add » , and then click on « Save » . You can also set the format template of numbers that should be considered as telephone numbers.

5.5 CREATE OR ASSIGN SERVICE HOURS & HOLIDAYS PLAN

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

5.6 CREATE OR ASSIGN DISPOSITION CODES

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

6 OPTIONAL COMMON FEATURES

6.1 ADD SKILLS

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

6.2 ADD PREDEFINED ANSWERS & ATTACHMENTS

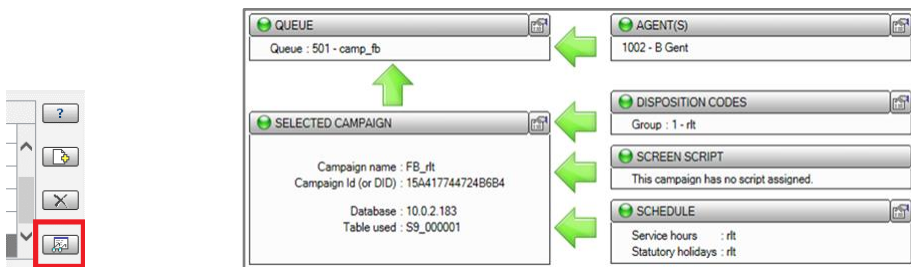
Please refer to the document « **Common features – Predefined answers & Attachments.doc** ».

6.3 ADD A SURVEY

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

7 CHECK THE SUMMARY OF YOUR CAMPAIGN

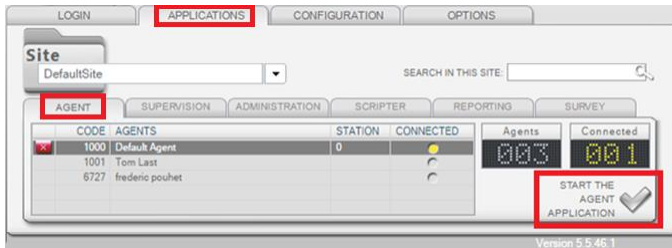
Your campaign should be complete at this stage. Open the campaign, and with the Campaign Summary, check that the vital elements are all in place:



- 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.

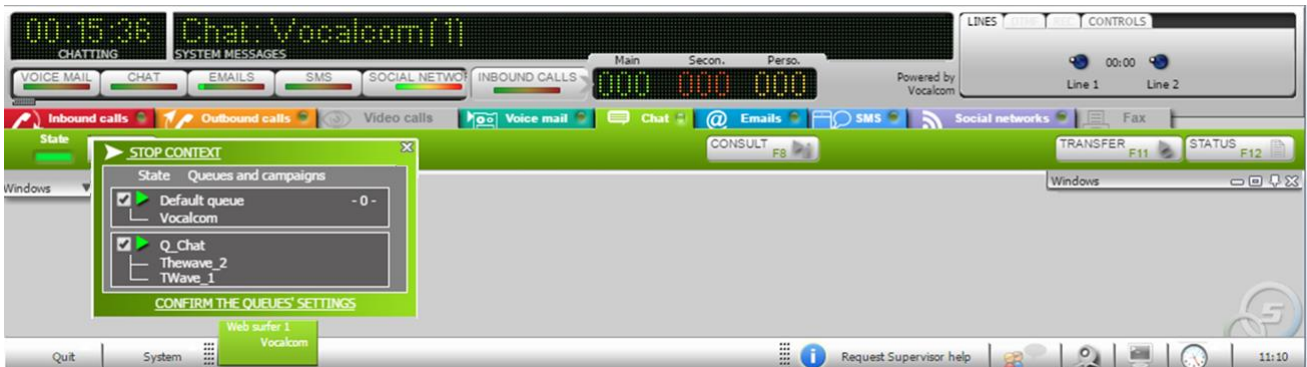


8 TEST AS AN AGENT

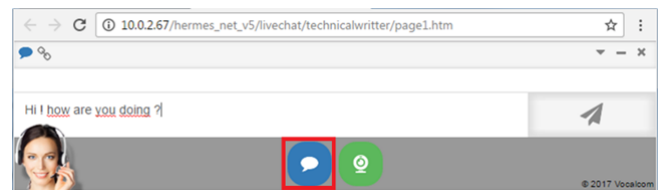


Connect to Hermes.Net as an agent, assigned to the Chat Web campaign.

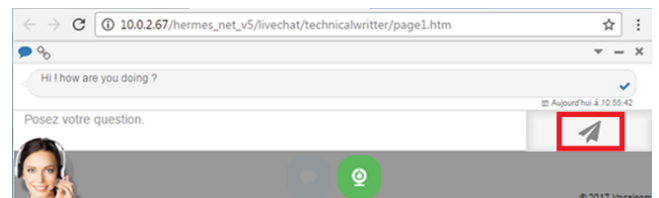
The agent starts the chat context.



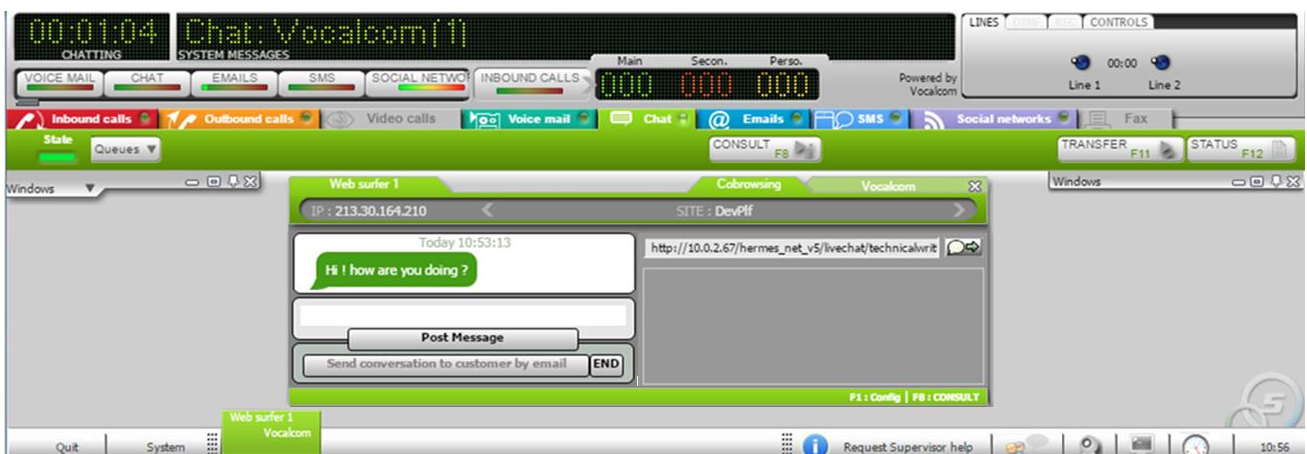
A client visits the web page, he clicks on the « Chat » icon, and types a question.



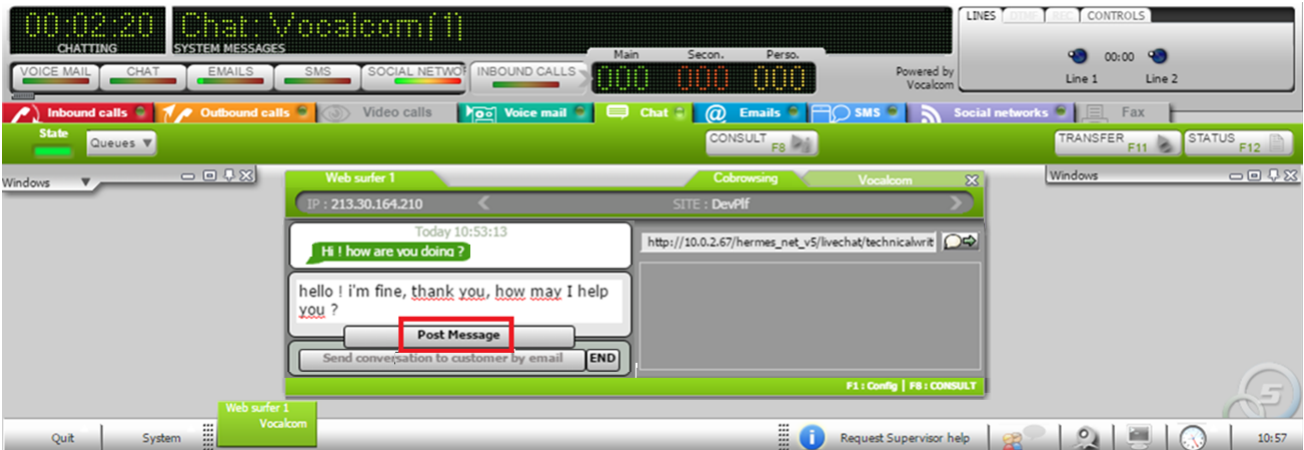
The client clicks on the « Send » button, his question appears in the conversation history.



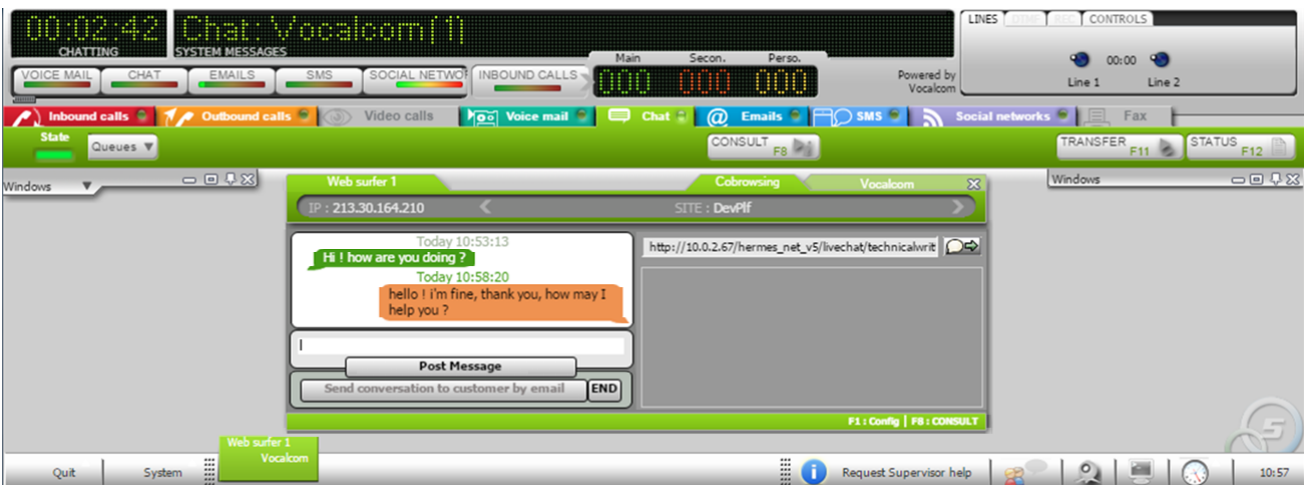
The agent receives the client's question in Hermes.



The agent types his answer and then clicks on the « Post message » button.



The answer appears in the conversation history in Hermes.



The client reads the agent's answer in the chat interface, on the web page.

