Manual call campaign management

Hermes.Net V5

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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.

Step by step

In order to set up your campaign, you must go through several important steps, described below. The order given here is generally considered the best, although please note that it is possible to follow a different order, for example by starting with the campaign creation in the Admin then creating the script.

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.

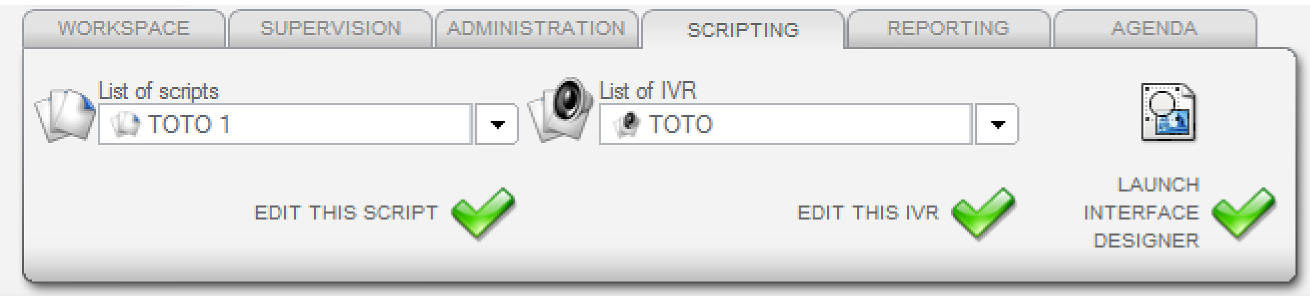
HOW TO SET UP YOUR MANUAL CAMPAIGN STEP BY STEP

IN THE INTERFACE DESIGNER MODULE
1 – Create your script
2 – Create your Client File
3 – Create your Global Variables
4 – Generate your script in production mode

IN THE ADMINISTRATION MODULE
5 – Create your campaign and set up the general parameters
6 – Create or assign your agents
7 – Create or assign your supervisors
8 – Create or assign your call statuses
9 – Create your address book (if you plan on using the agenda)
10 – Create or assign your salesmen's planning (if you plan on using the agenda)
11 – Create or assign your salesmen (if you plan on using the agenda)
12 – Check the summary of your campaign

What to do in the Interface Designer module

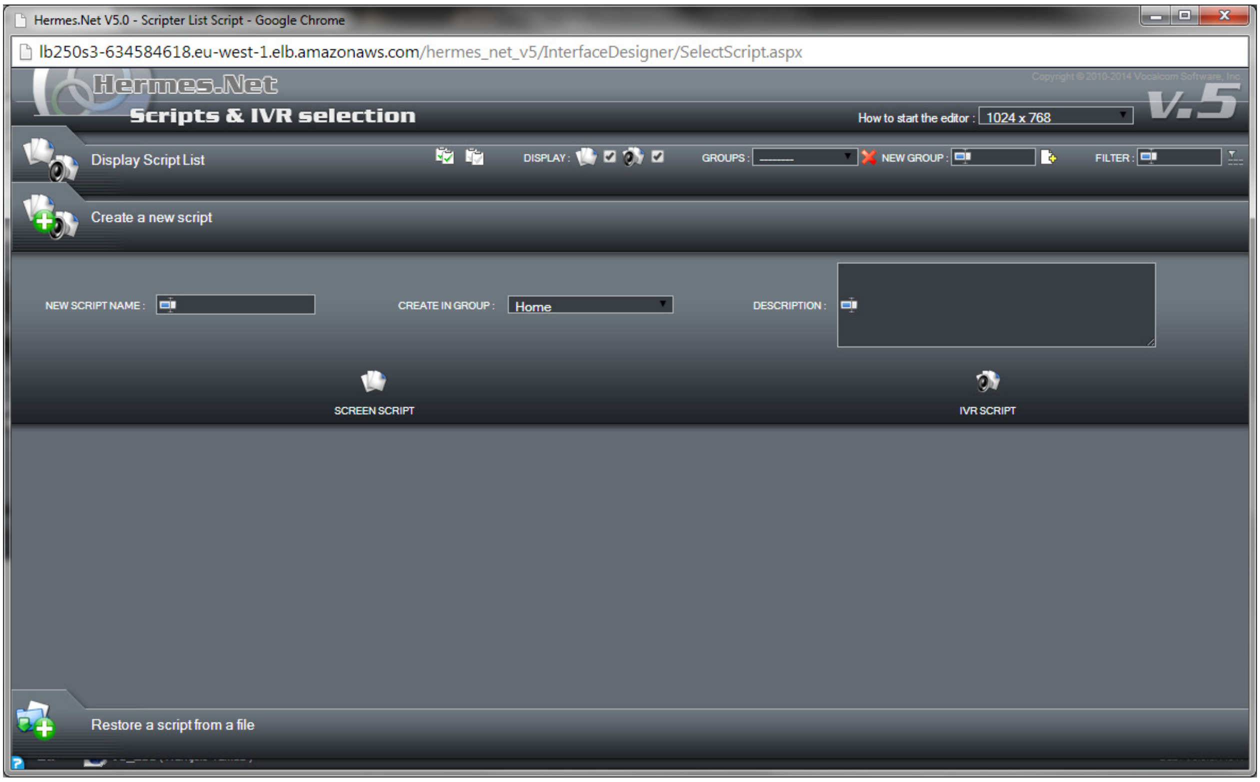
NOTE: It's not necessary to create a screen script to a manual campaign, if do not need it. As you will see later, you can use a free URL.



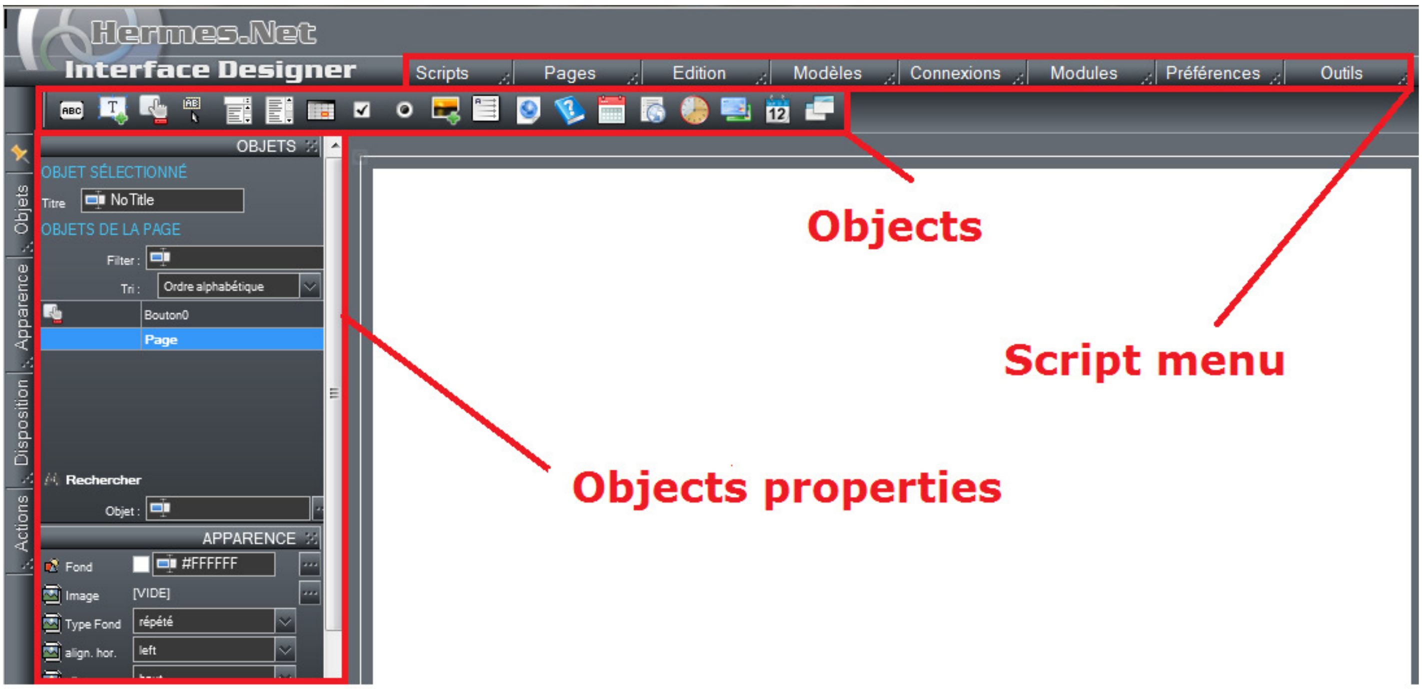
1- Create your script

At first, you will create the script (the scripted dialog you want the agents to use live with prospects), following the model you will have established before hands. It is very important to have at least a basic plan for your script, and to know, even roughly, how many pages you will need, how many parts are necessary in it, etc… **Draw a storyboard of your script on paper**. It will be much easier and quicker to create your script after that, knowing in which direction you want it to go.

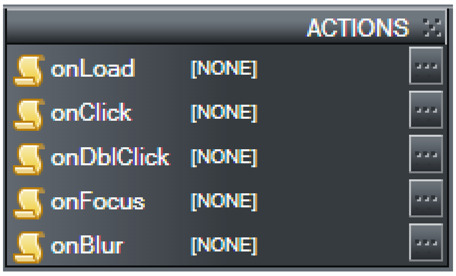
In the module, click on « **Create a new script** » and create a new screen script, give it a name and a description.
Once the script is created, you can access it directly from the home menu Hermes V5 through the function **« Edit this script ».**

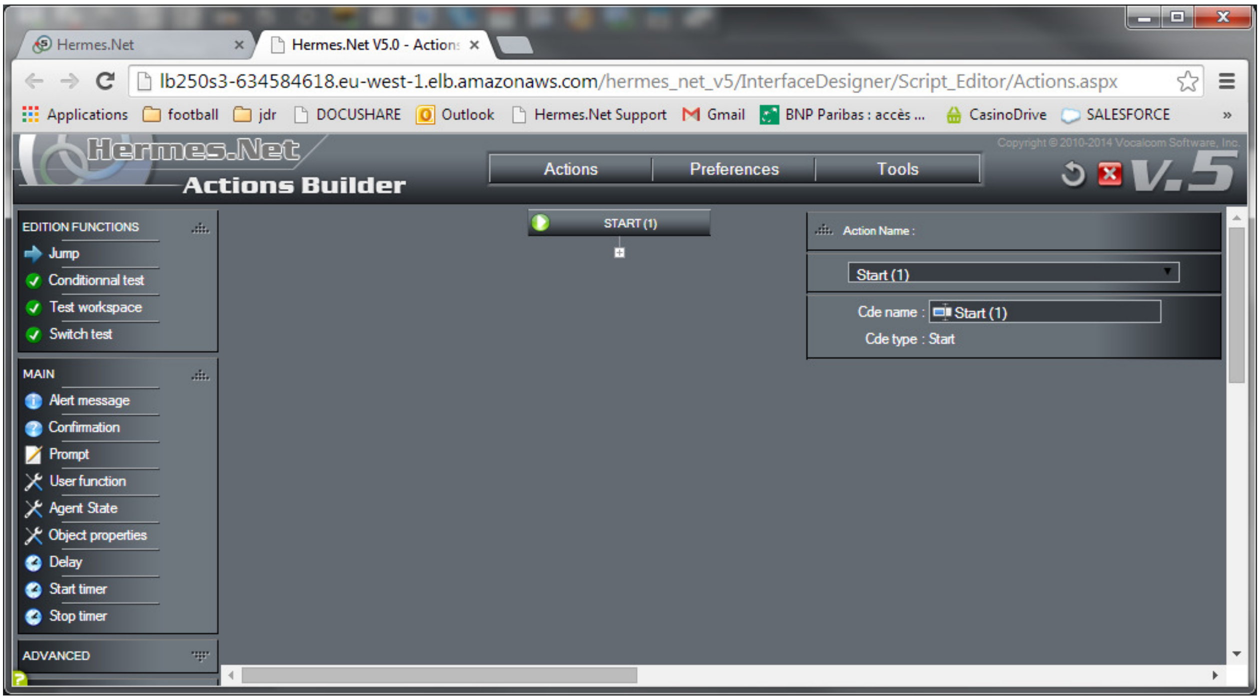


In the script creator, create your script using the menus, variables, objects and their different properties. For more help on the script creator, please refer to the **"Interface Designer"** document.



You'll also need to create and attribute **actions** to your objects depending of what you need, using the **Action builder** screen and the various commands available inside.



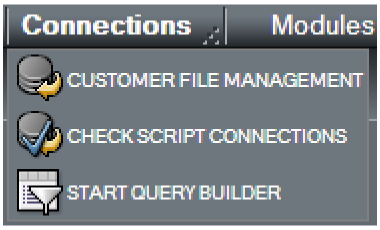


For more help on the actions, please refer to the **"Interface Designer"** document, existing for V5.

2- Create the Client file

Once your script is done, you'll need to pre-create the client file, in which we will later import all the client data.

Click on the « **Connections** » menu; and select « **Customer file management** »:



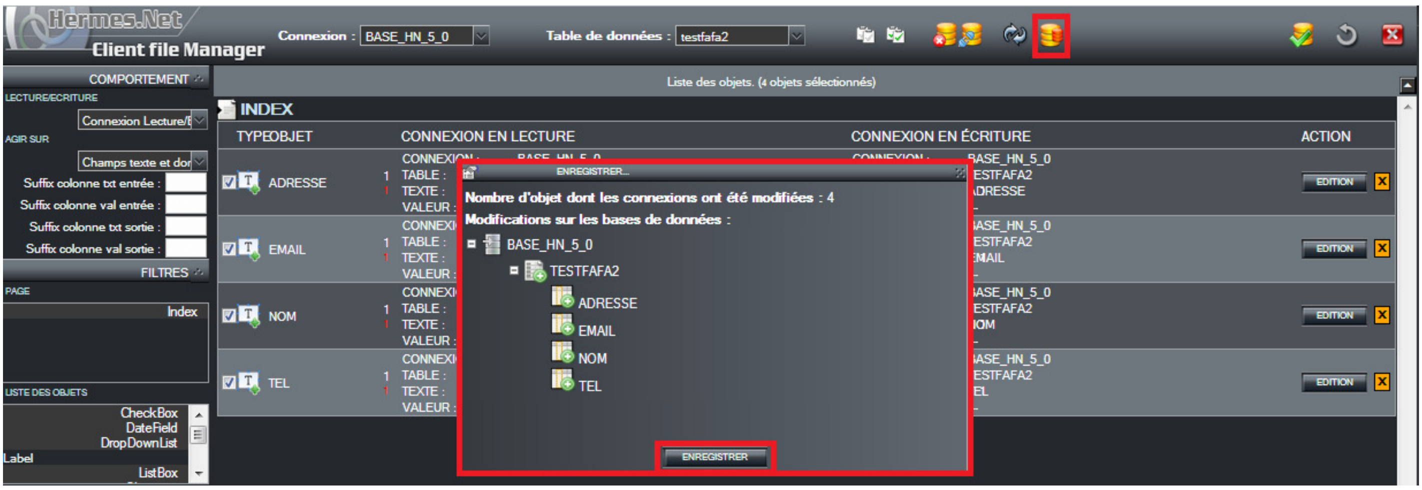
Choose the **Connection**, and create a new data table in **Data table**:

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

Click on **"Select All".** Check that all the listed objects correspond to what you have on the script. As well, check which objects you won't want to keep in the table. It may be that you have no interest in creating a column for the objections in your table.

Click **on "Connect All".** In the list below, you can see what connection has been made for reading and writing data.

Click on **"Save"**. A pop-up shows you a summary of your connections. Click on **« Save »** to complete the recording of this new data table.



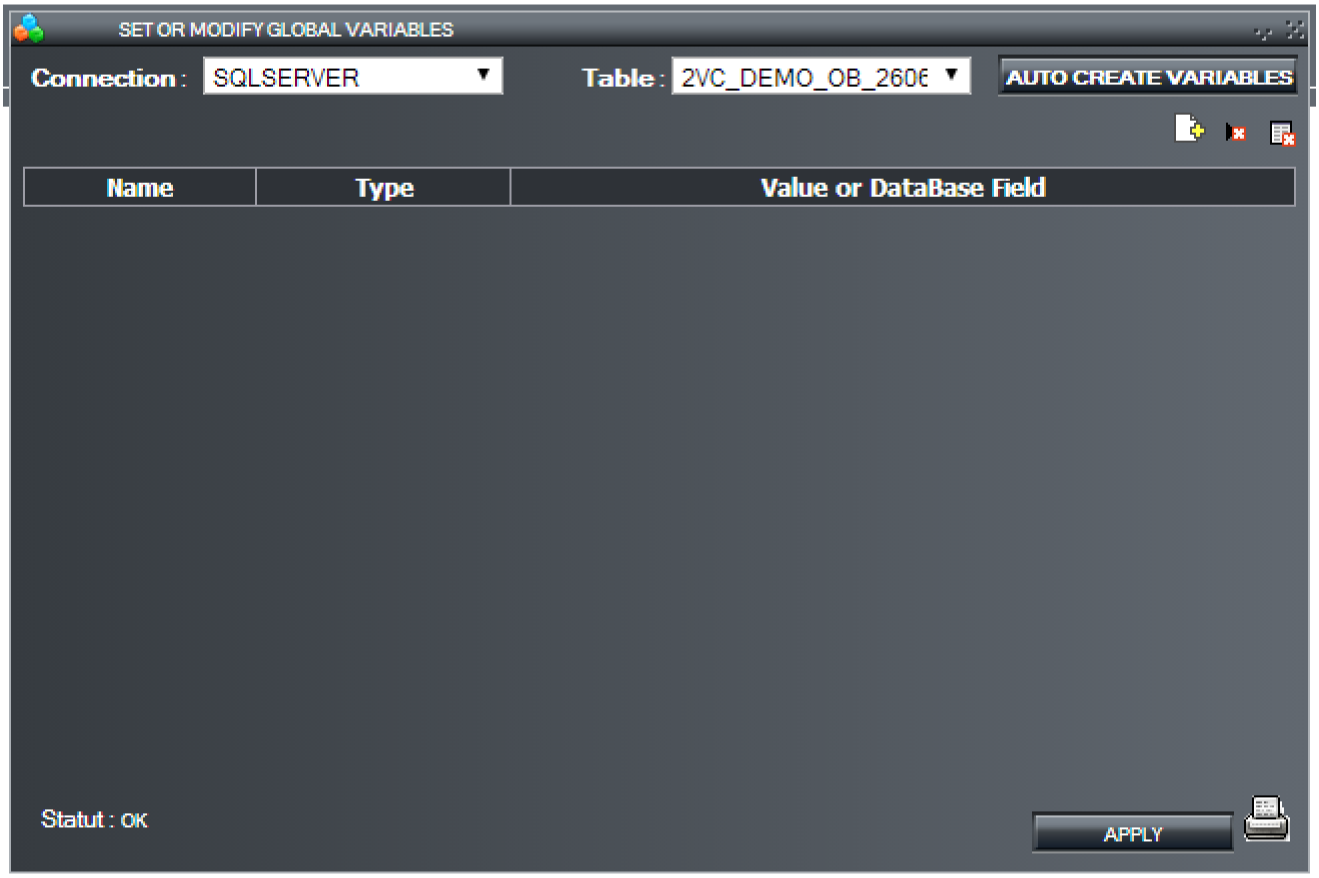
NOTE: If you ever modify your script and add new objects, you will have to follow the same steps to add those as columns in your data table.

3- Create your global variables

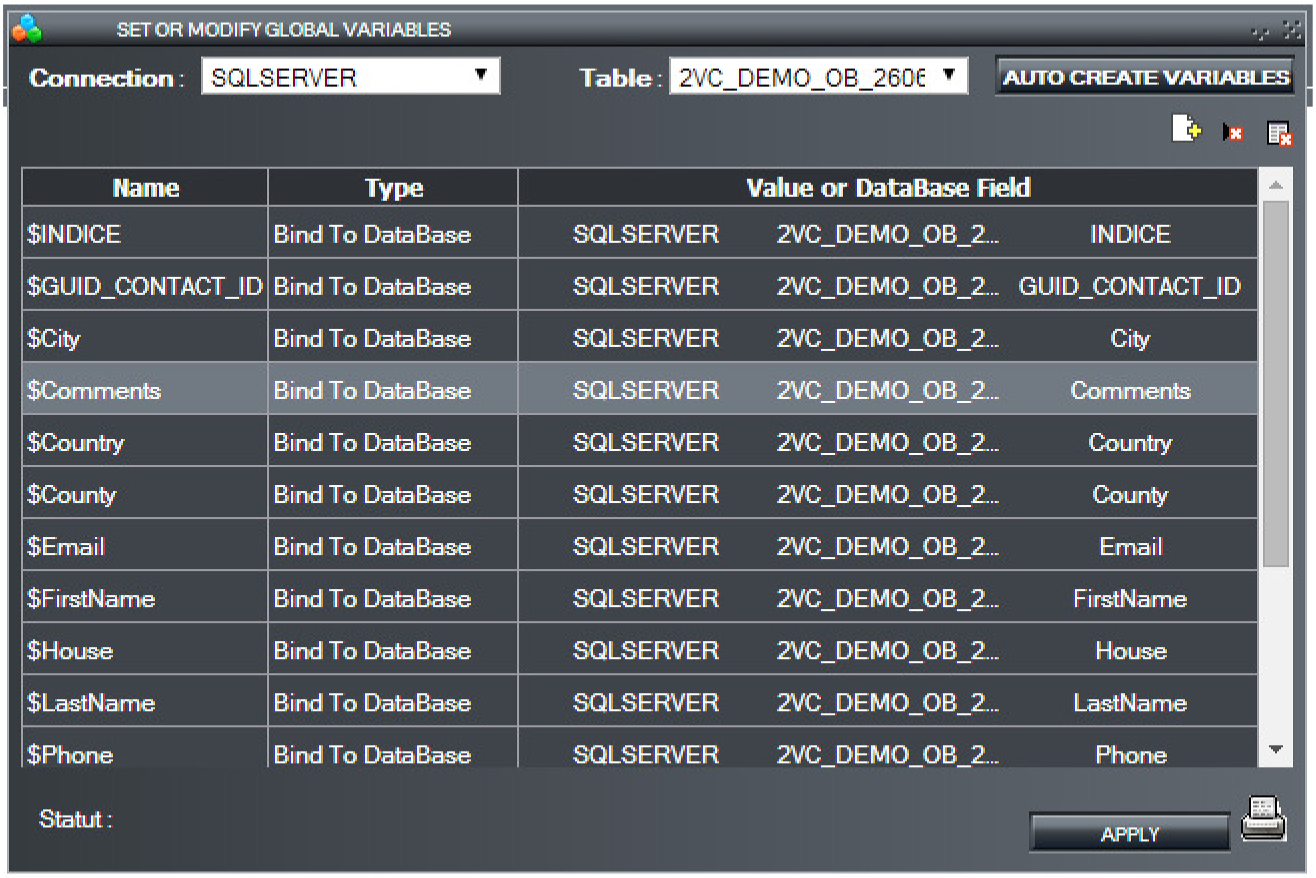
Once you client file is done, you'll have to take care of the global variables set in your text (ex: $CITY). It is important that you tick the box **« Evaluate »** in the **« Behavior"** properties of your text, in order for the software to check the variables placed there.

Click on the "**Modules**" menu, and select "**Set global variables**":

Select the correct base in **« Connections »** and select the client file you have just created in **"Table".** Then click on **" Auto create variables »**:



The list is created with all the variables present in the script. Erase the first two **« $INDICE »** and **« $GUID_CONTACT_ID »**. Then click on **« Apply »** to save.

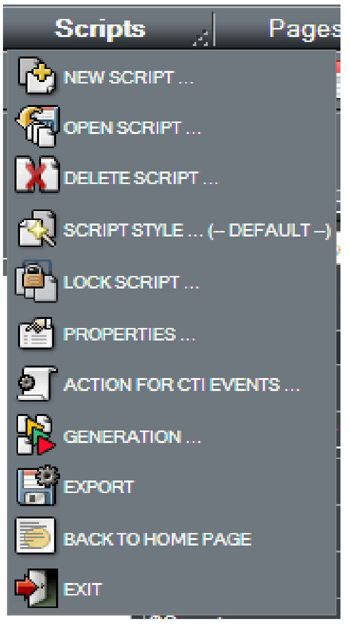


NOTE: In case you have variables only appearing in actions, remember to add them manually to the list of global variables with a « « value.

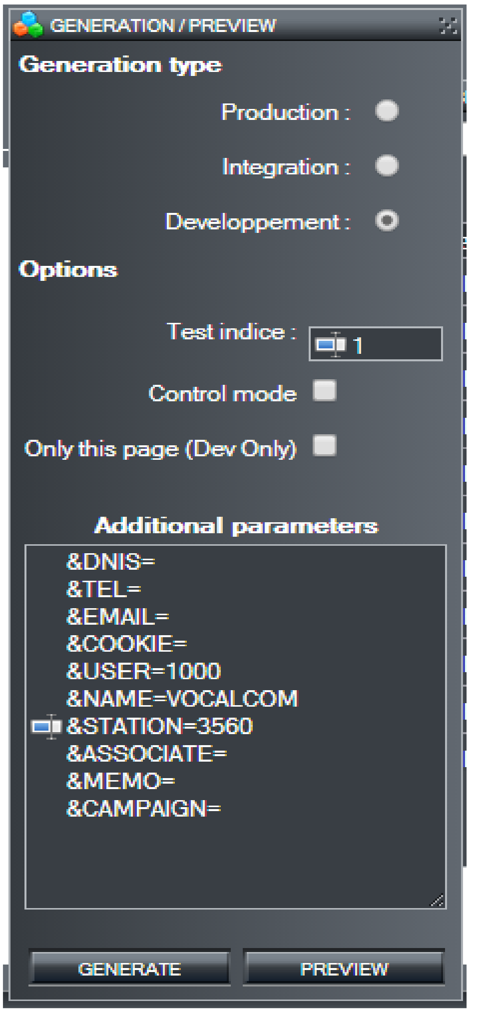
4- Generate the script in production mode

At this stage, you only have one task left in this module: to generate the script in production mode (as opposed to the development mode, which is a test mode only), in order to publish it in the administration module

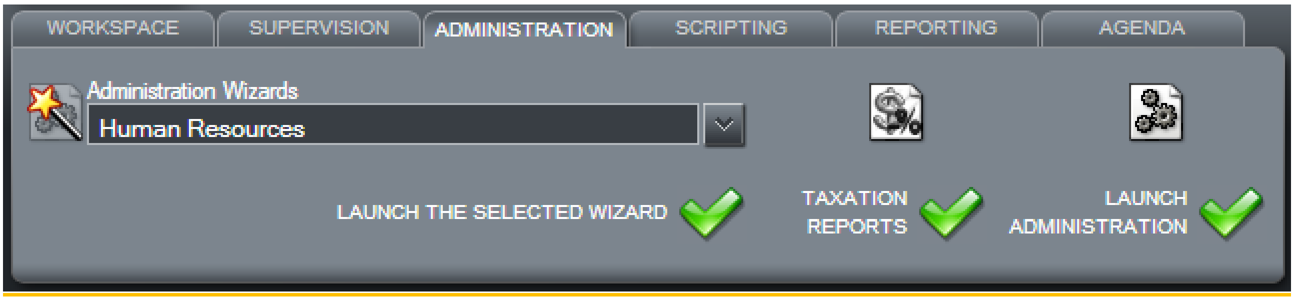
Click on the **"Scripts"** menu, and select **"Generation"**:



Click on **"Generate",** after having selected the **« Production »** mode.



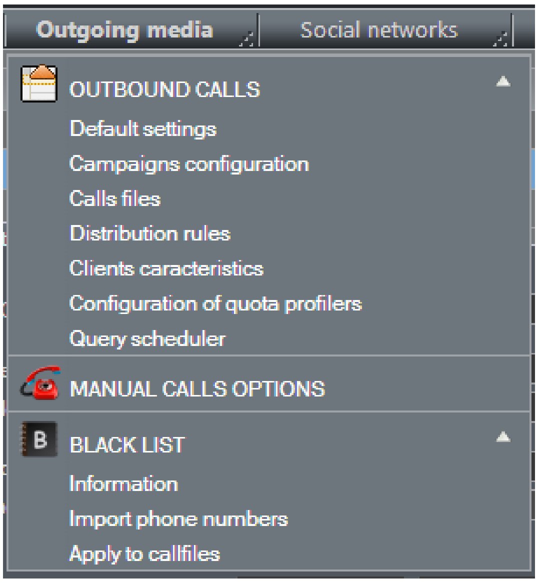
What to do in the Administration module



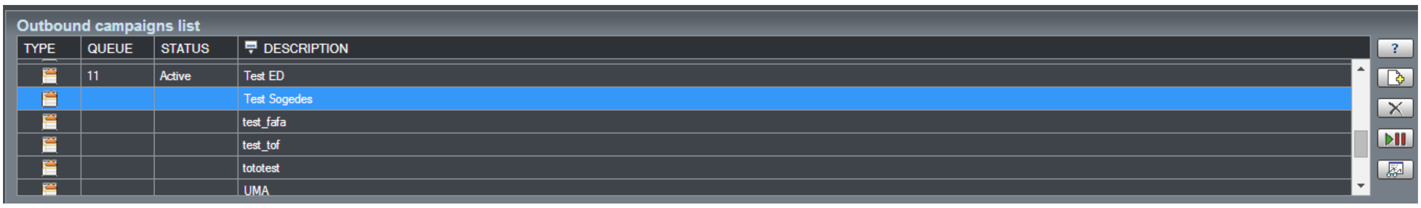
5- Create your campaign and set up the general parameters

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 joined together, that will interact with the telephony. Some elements are **required**, while some others are purely **optional**.

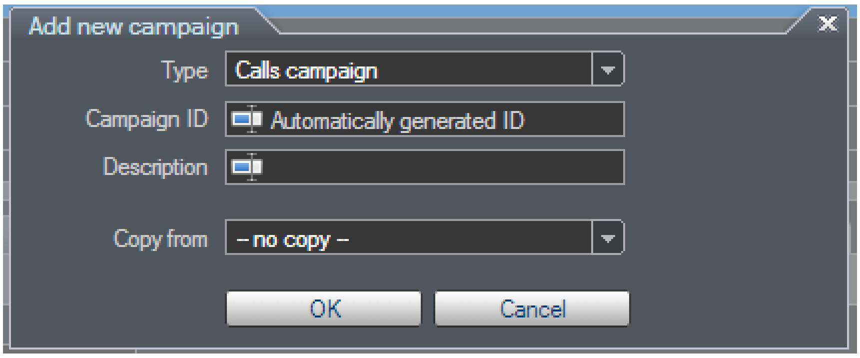
Click on the « **Outgoing media** » menu, and select « **Manual calls options** »:



Click on **"Add new"** to create a new campaign:

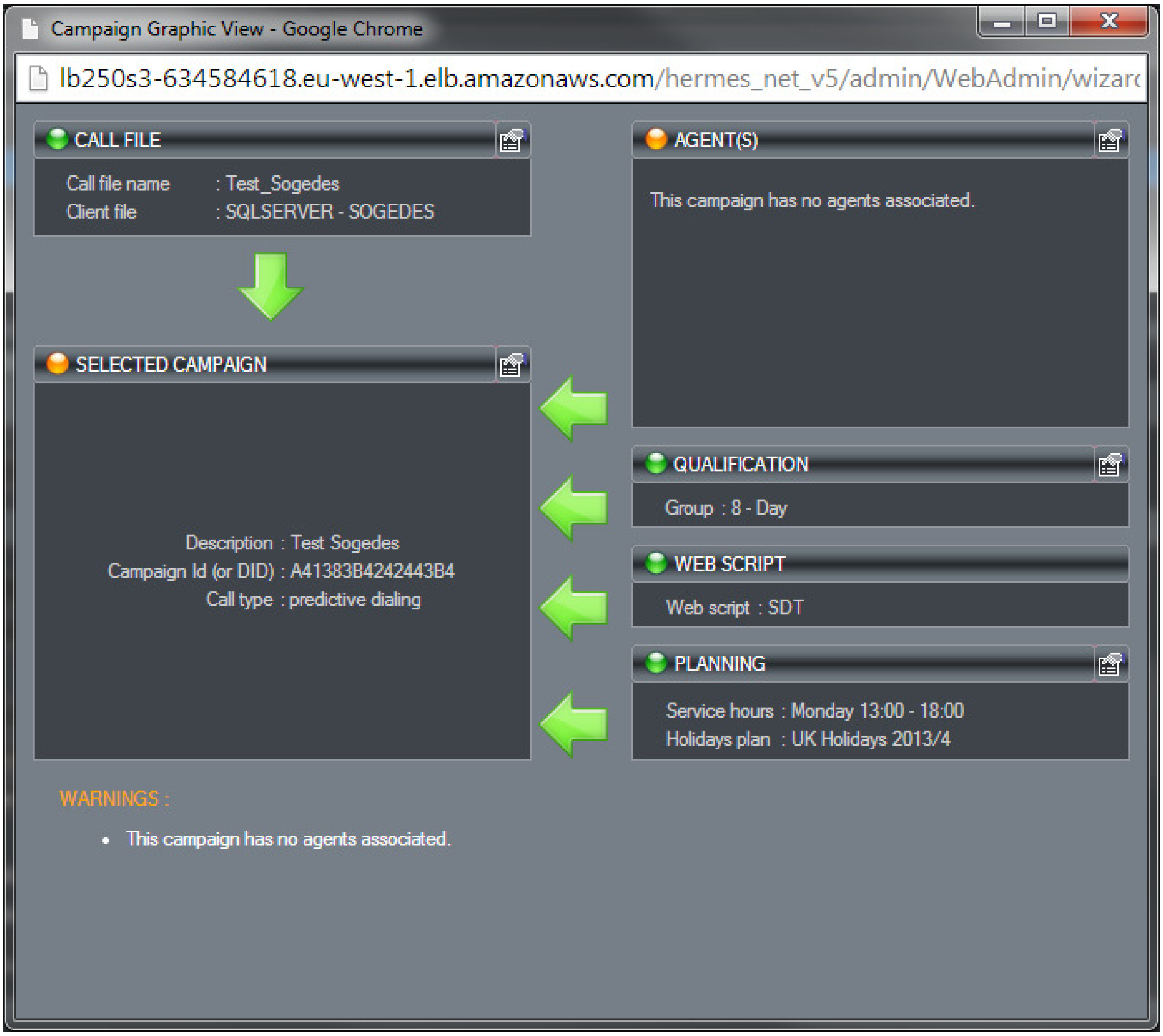


Type in the ID and the name you want, and then click on **"OK ».**



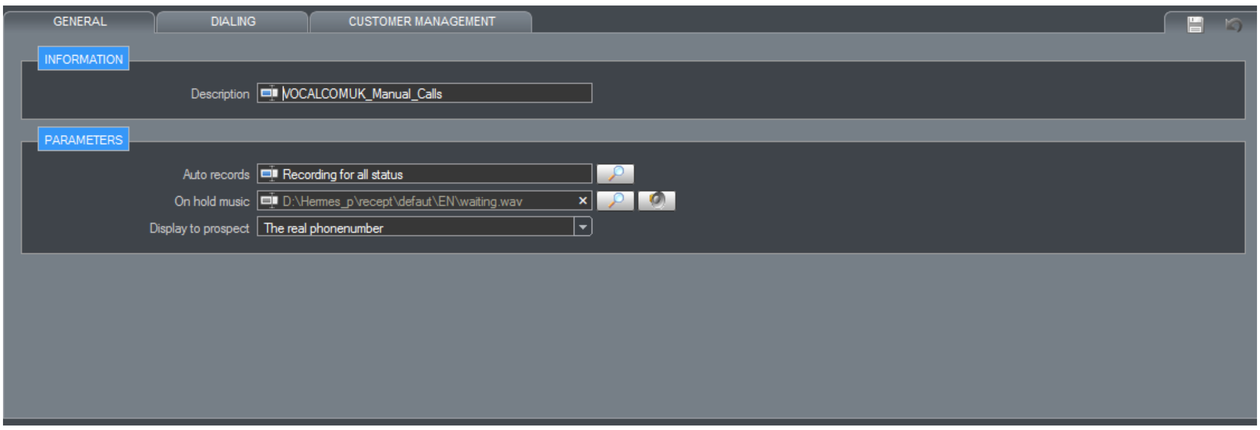
Under the different tabs, you'll be able to set up all the elements of your campaign.

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.**



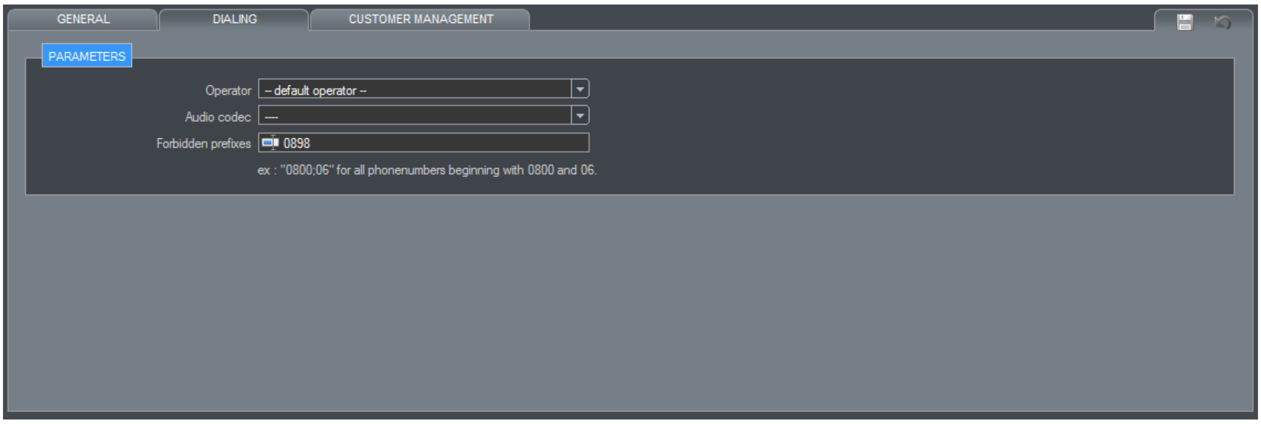
- A green dot means the element is set up correctly.
- An orange dot means that alerts have been detected. The campaign could be started, but maybe won't work correctly.
- A red dot means that alerts have been detected. The campaign won't work at all.

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



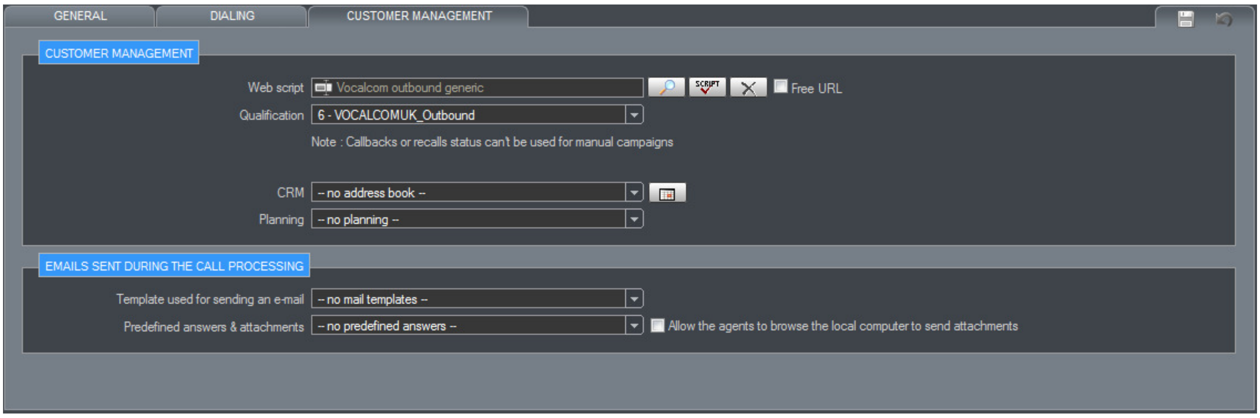
- The **on hold music** you like
- **Display to prospect**: what number displays on the prospect's phone when the system calls him.

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:

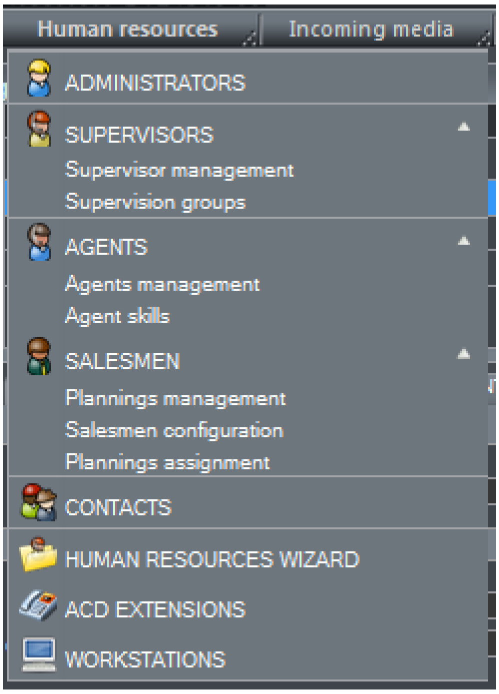


- Web script: select the screen script you have created.
- Email sent during the call processing: if the desired workspace supports email campaigns email settings.
We'll set up the other parameters later.

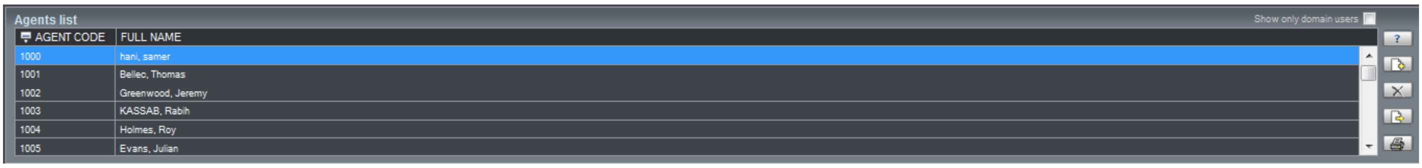
6- Creating agents accounts

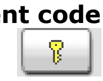
Obviously, if you don't have existing agent's accounts, you now have to create some in order to assign them to your campaign. Click on **"Human resources",** then under **"Users"** select **"Agents".**

NOTE: The "Human Resources Assistant" sub-menu allows you to create and manage multiple accounts quickly, by following a few simple steps. In the V5, agent groups are managed directly through their workspace.



Click on **"Add"** to create a new account:



Creating an agent account is similar to creating a supervisor. Each account will receive a 4 digit **Agent code or login** (for ex. 1000), and a **4 digit password (letters),** that can be changed by clicking the  button.

You can configure the following tabs:

General : account general information, **hangup after call** (only useful if your agents don't use headsets), and **automatically ready** options, if you wish to reduce the time between worked times (call + wrapup) for the agent, **automatically pick up** for the softphones and Avaya, and media blending options if necessary. We can also modify, personals callback of the agent.

Skills : assign skillgroups and relevant levels to the agent.

Programs : assign the workspace you want, its display parameters, and supervision/rights to the group if you wish to do so.

Rights : assign phone rights, supervision rights (if selected under the previous tab), and media blending rights if necessary.

Supervision groups : As well as an agents group , it is possible to creata a supervision group and assign agents and supervisors to it. In the case of a big team, it reduces the scope of supervisors to a particular group of agents.

7- Creating or assigning supervisors accounts

In order to create a supervisor, you just need to, when creating an agent account, give him supervision and reporting (optional) rights. This account will be automatically bumped to supervisor level, and the user will have access to the Supervision and Reporting modules.

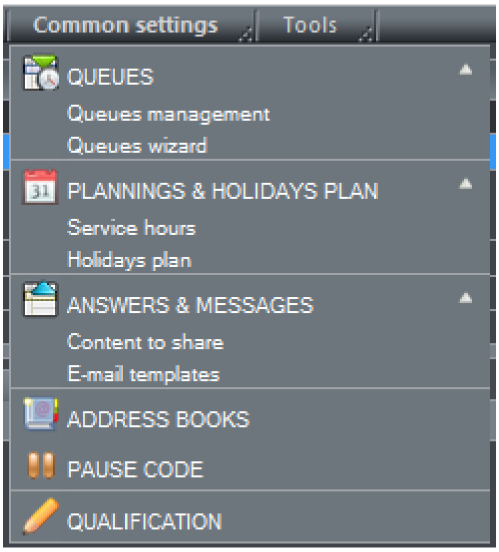
You can also directly create a Supervisor account in the **Supervisor** menu of **Human Resources**, using the same principles as agent creation, if you wish to do so.

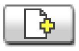
8- Creating or assigning call qualifications

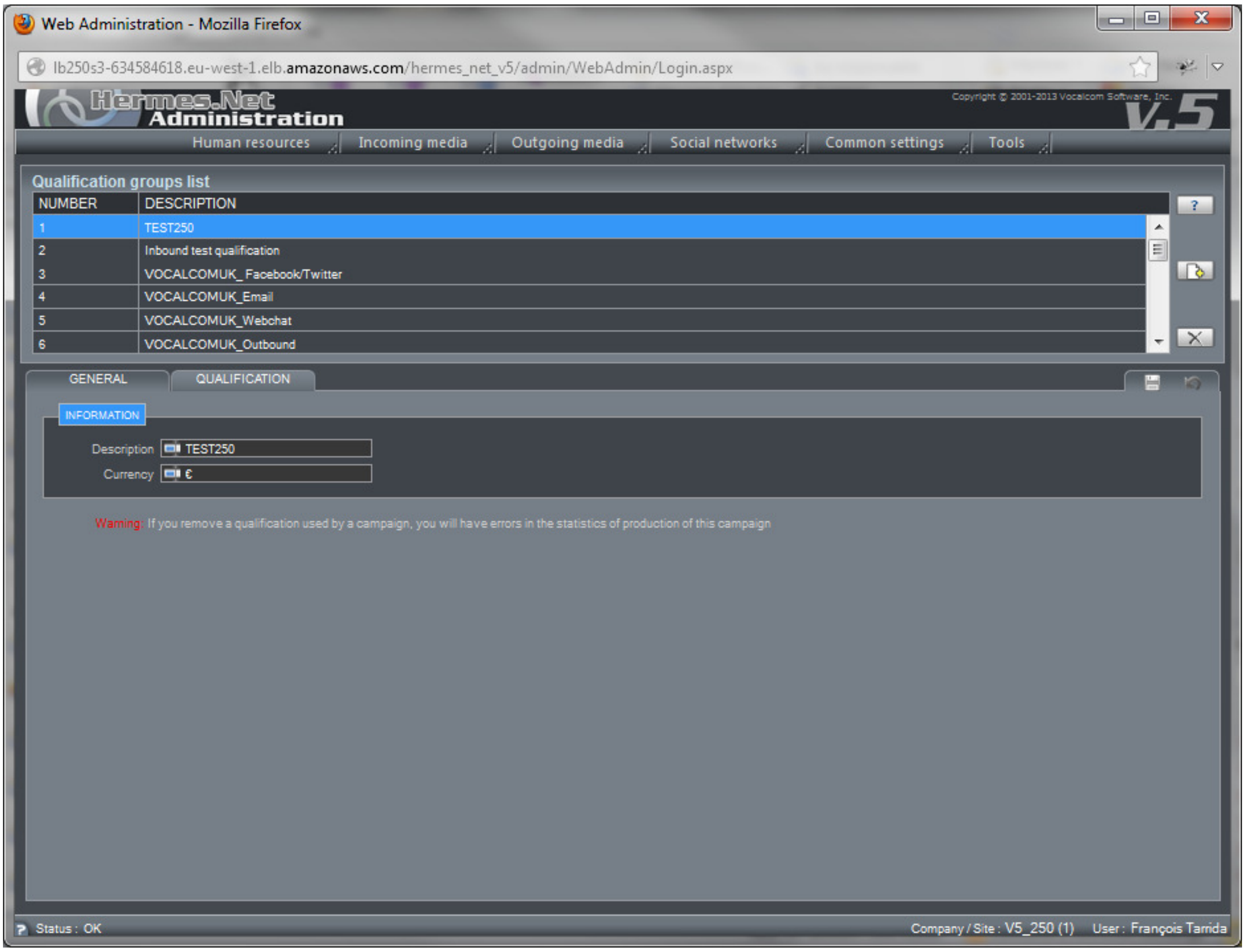
For your agents to qualify their calls, you will need to create a group of **call qualifications** (also **called call statuses**). It is very **important** to have a clear idea of what call statuses you need before creating the group, as adding or cancelling statuses once the campaign is ongoing will decrease the precision of your statistical readings.

NOTE: Call qualifications are optional on manual campaign. Without holidays, campaign will still work.

Click on **"common settings",** and then select **"Qualifications".**

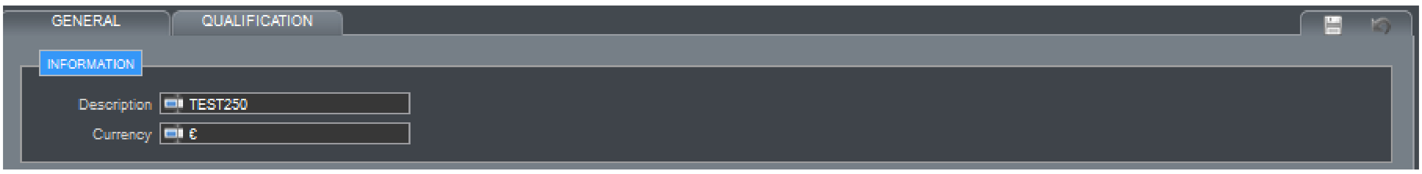


Click on **"Add"**  to create a new call qualification group.

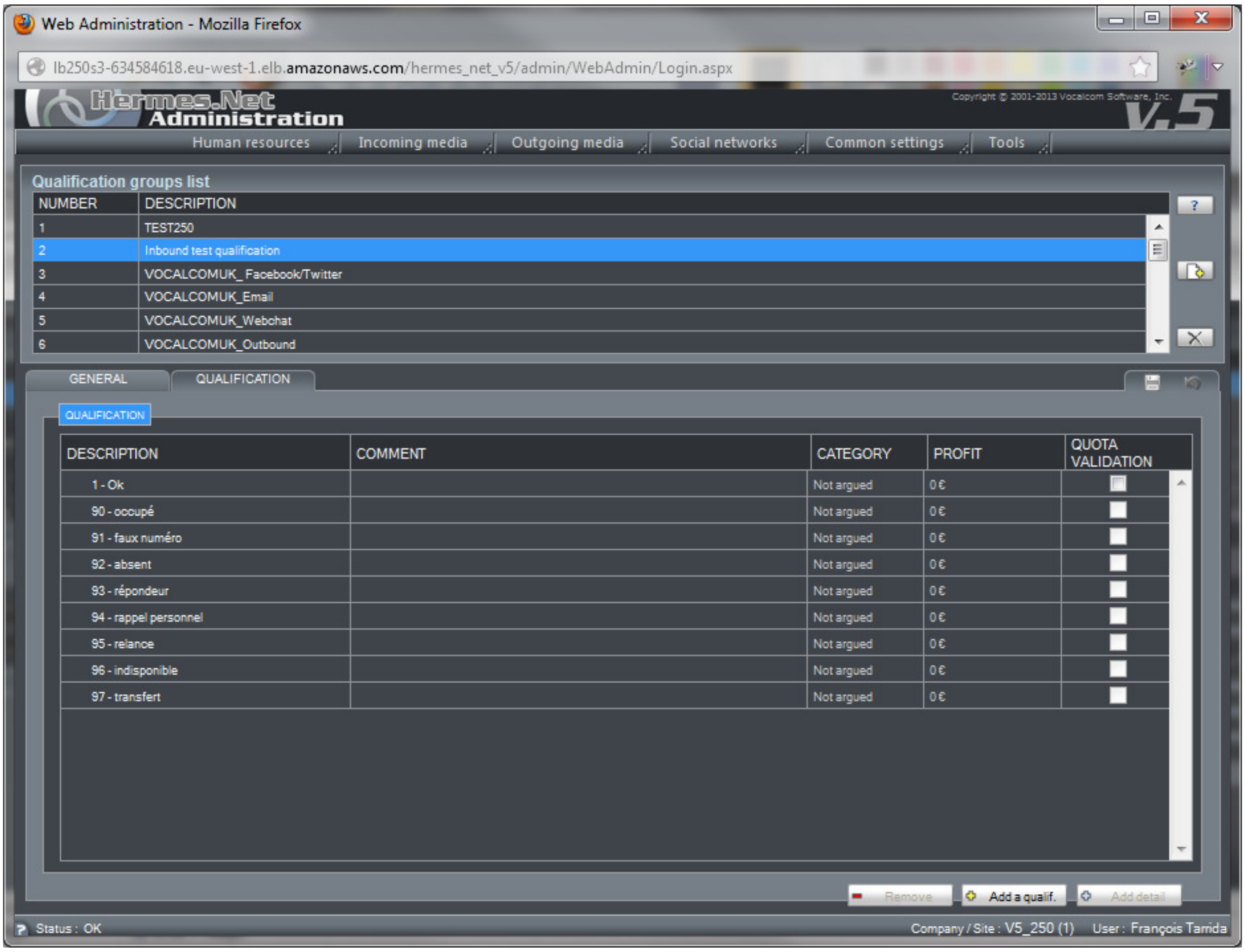


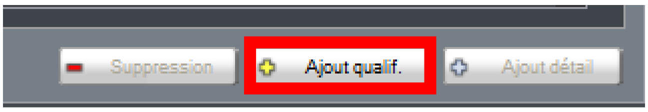
You can configure the following tabs, which are general and qualifications.

General: the name of the status group and the currency that you wish you use for the profits of one or several call qualifications.



Qualifications: Create a new status by clicking **"Add a qualif."**. If you wish to delete it, click **"Remove"**. You can also add sub-status or details by clicking **"Add detail"**. A sub-status is useful if you wish to give more precision to the general status, for example what was sold under the general status SALE.

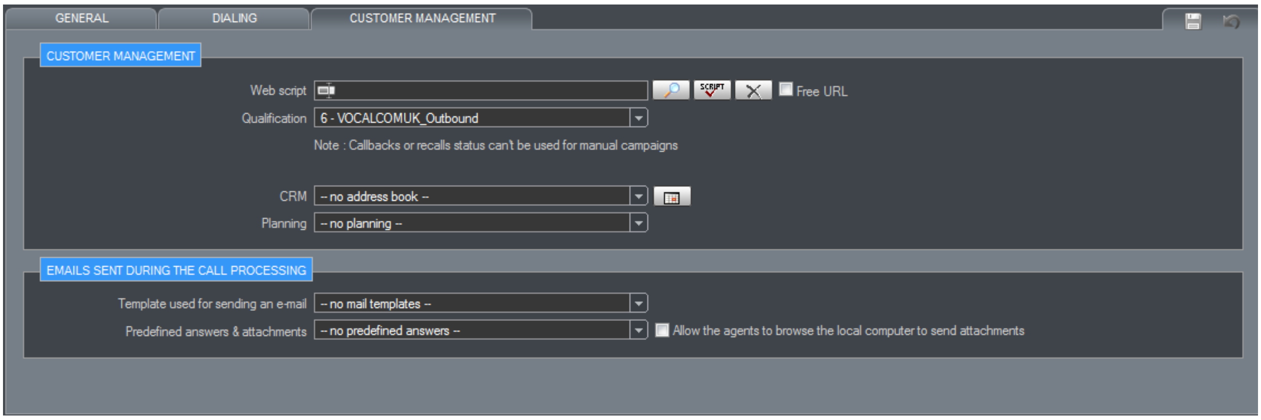




For each qualification, choose a category (**Positive, Argued or Non-Argued**), as discussed during training. These categories provide the level of **achievement** in the statistics of the campaign and agents. You can also place a profit on one or more qualifications, and the **validation of quotas** as well.

When you create new qualifications, by checking **"systems qualifications"**, you can select system statuses, such as **93- Answering machine** or **92-Absent**. Some will be useful to your agents, such as answering machine, because in progressive or predictive dialing, 20% of respondents ascend agents.

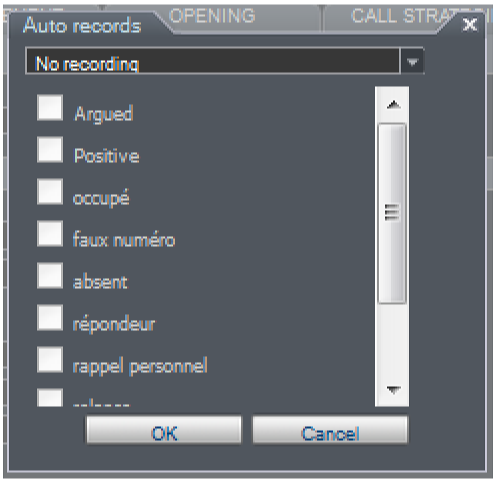
Save your status group, and go back to your campaign. Under the **« Customer management »** tab, in **« Qualification group »** select the group you've just created and save.



Note: You can now also set up an auto recording on all statuses or some selected statuses (for example, you need to keep track of all SALE agreements for legal reasons, etc…).

Under the **"General"** tab of your campaign, **in "Auto records",** click on the loop button .

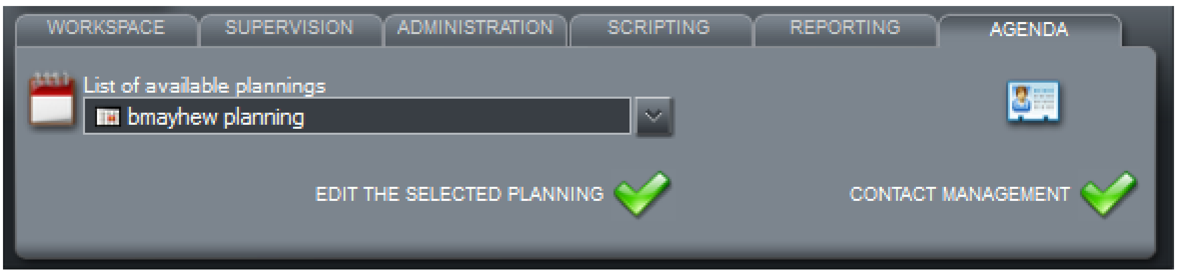
Choose between **"Recording for some status"** and **"Recording for all status",** tick the chosen status. Save by clicking OK.



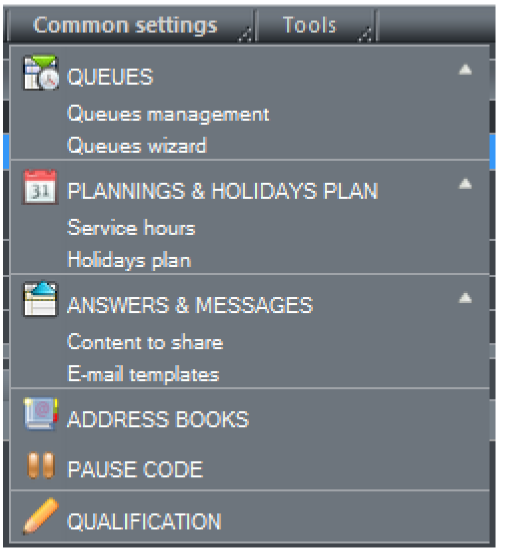
9- Creating your Address book

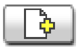
If you wish to take an appointment with the Hermes agenda module, you will need to set up an address book that contains the customer data, and a salesmen planning and salesmen accounts.

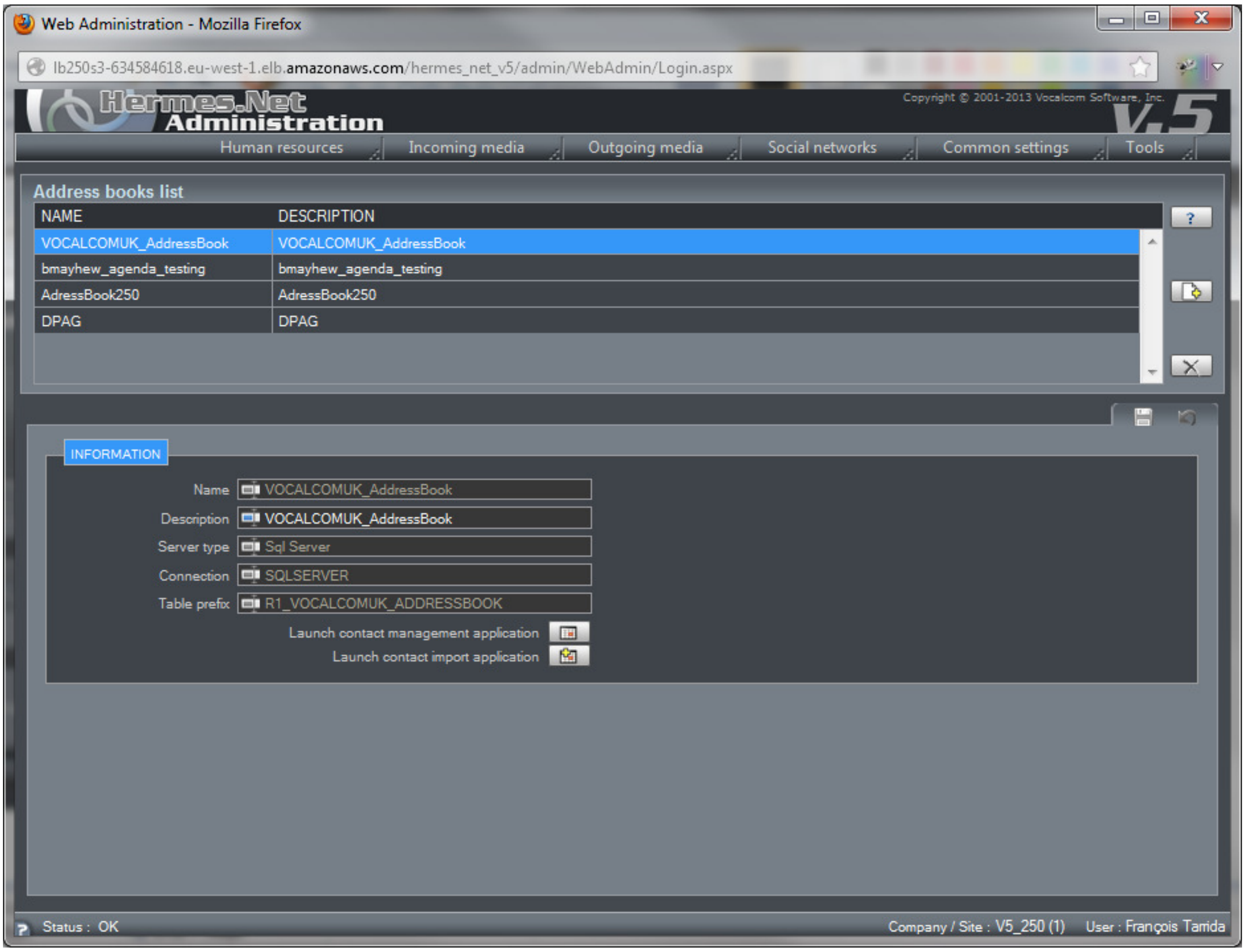
NOTE: In V5, if you want you can, through a wizard on the home menu, create directly your plannings and CRMs.



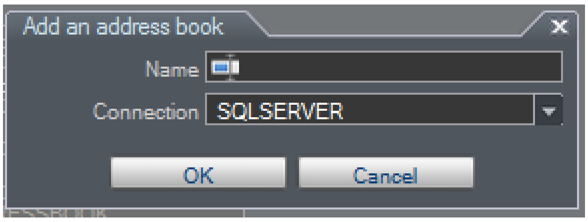
Click on **"Common settings",** and then select **"Address books".**



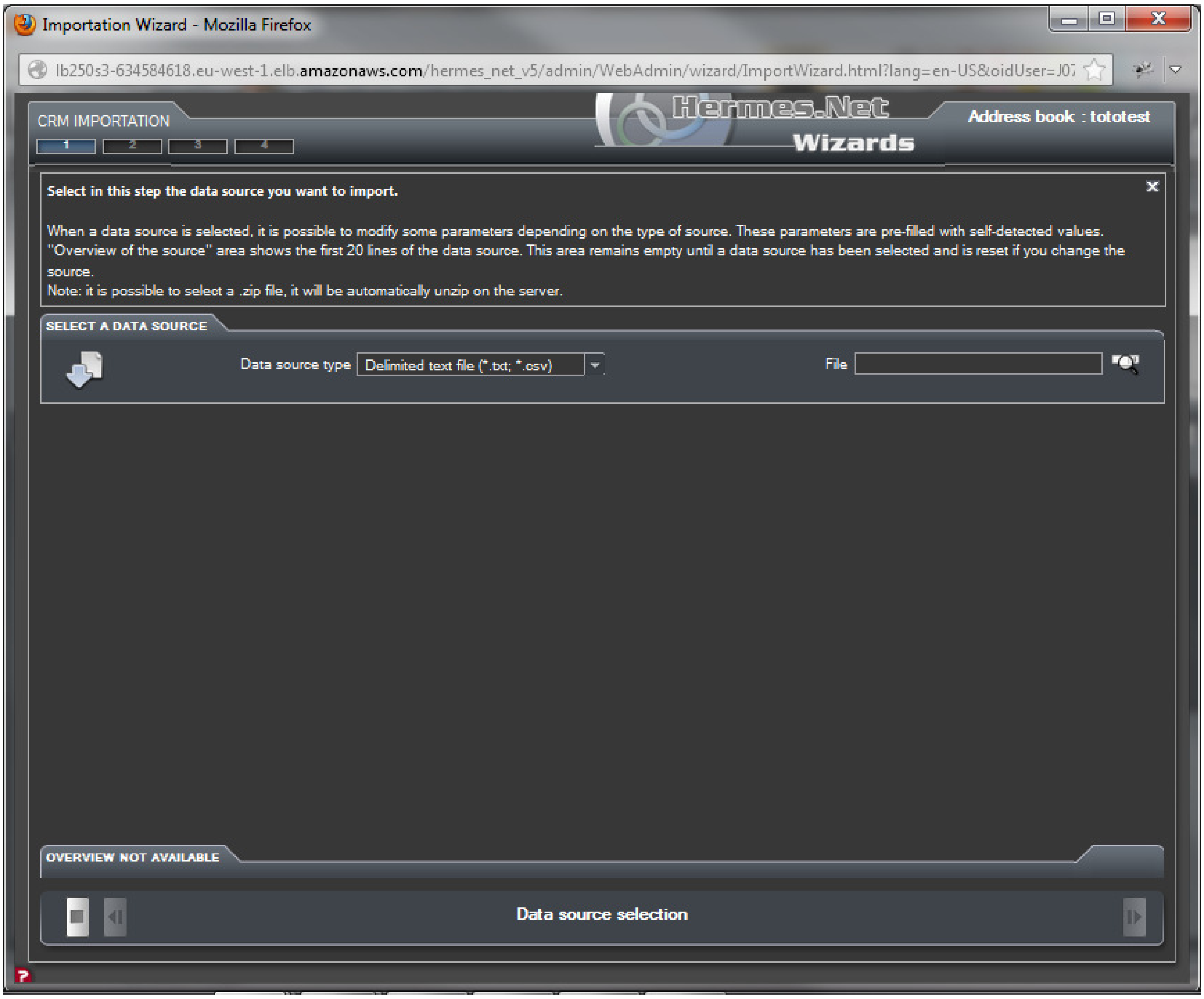
Click on **"Add"**  to create a new address book.

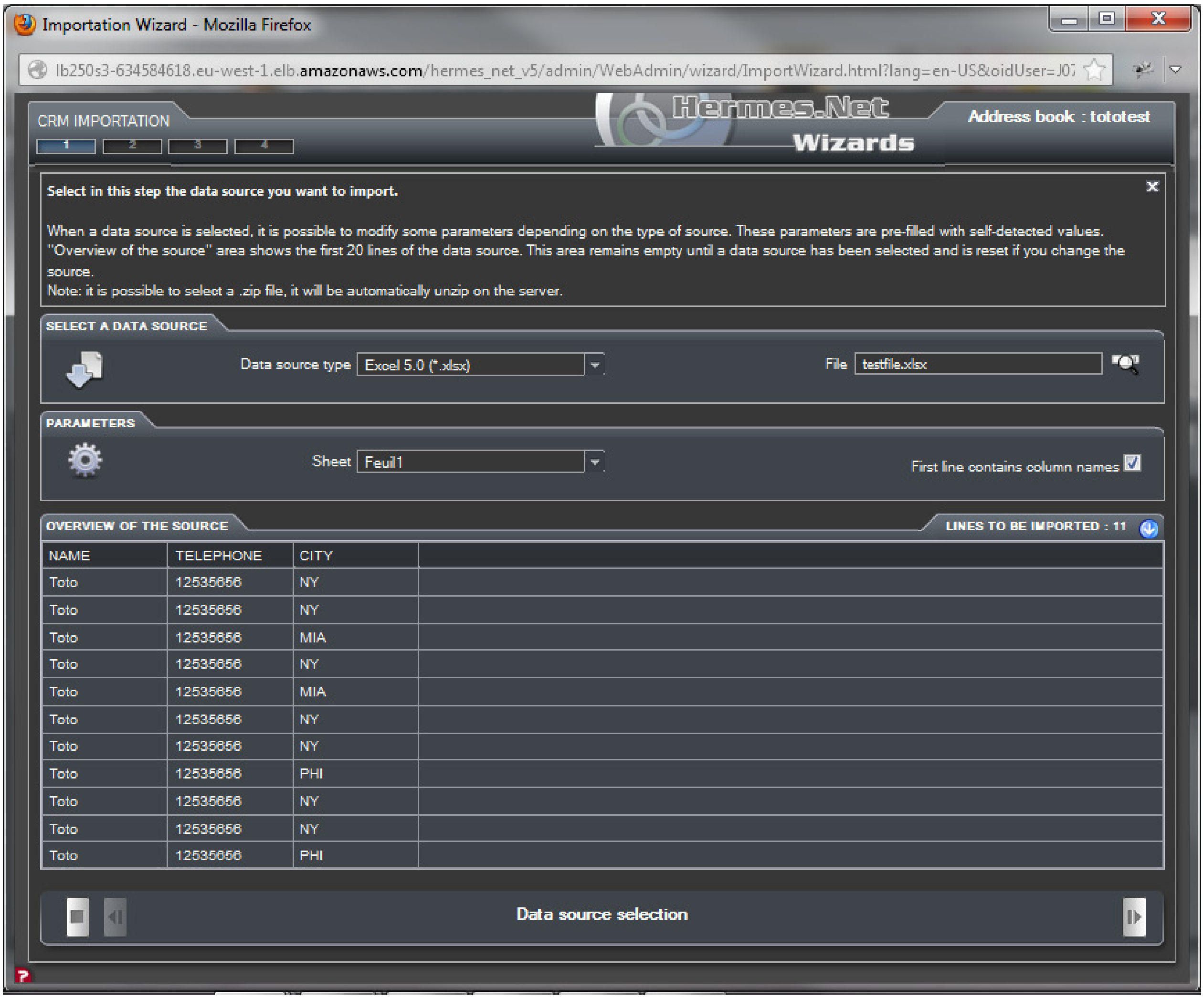


Give a name to your address book, and select the connection to your database:



Click on **"Launch contact import management".** This stage follows the same steps as creating a call file. The only difference is that you can fill in personal and professional data for the clients.


Importation Wizard - Mozilla Firefox
lb250s3-634584618.eu-west-1.elb.amazonaws.com/hermes_net_v5/admin/WebAdmin/wizard/ImportWizard.html?lang=en-US&oidUser=J07
CRM IMPORTATION
Hermes.Net
Wizards
Address book : tototest
Select in this step the data source you want to import.
When a data source is selected, it is possible to modify some parameters depending on the type of source. These parameters are pre-filled with self-detected values.
"Overview of the source" area shows the first 20 lines of the data source. This area remains empty until a data source has been selected and is reset if you change the source.
Note: it is possible to select a .zip file, it will be automatically unzip on the server.
SELECT A DATA SOURCE
Data source type
Delimited text file (*.txt; *.csv)
File
OVERVIEW NOT AVAILABLE
Data source selection


Importation Wizard - Mozilla Firefox
lb250s3-634584618.eu-west-1.elb.amazonaws.com/hermes_net_v5/admin/WebAdmin/wizard/ImportWizard.html?lang=en-US&oidUser=J07
CRM IMPORTATION
Hermes.Net
Wizards
Address book : tototest
Select in this step the data source you want to import.
When a data source is selected, it is possible to modify some parameters depending on the type of source. These parameters are pre-filled with self-detected values.
"Overview of the source" area shows the first 20 lines of the data source. This area remains empty until a data source has been selected and is reset if you change the source.
Note: it is possible to select a .zip file, it will be automatically unzip on the server.
SELECT A DATA SOURCE
Data source type
Excel 5.0 (*.xlsx)
File
testfile.xlsx
PARAMETERS
Sheet
Feuil1
First line contains column names
OVERVIEW OF THE SOURCE
LINES TO BE IMPORTED : 11
NAME
TELEPHONE
CITY
Toto
12535656
NY
Toto
12535656
NY
Toto
12535656
MIA
Toto
12535656
NY
Toto
12535656
MIA
Toto
12535656
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Toto
12535656
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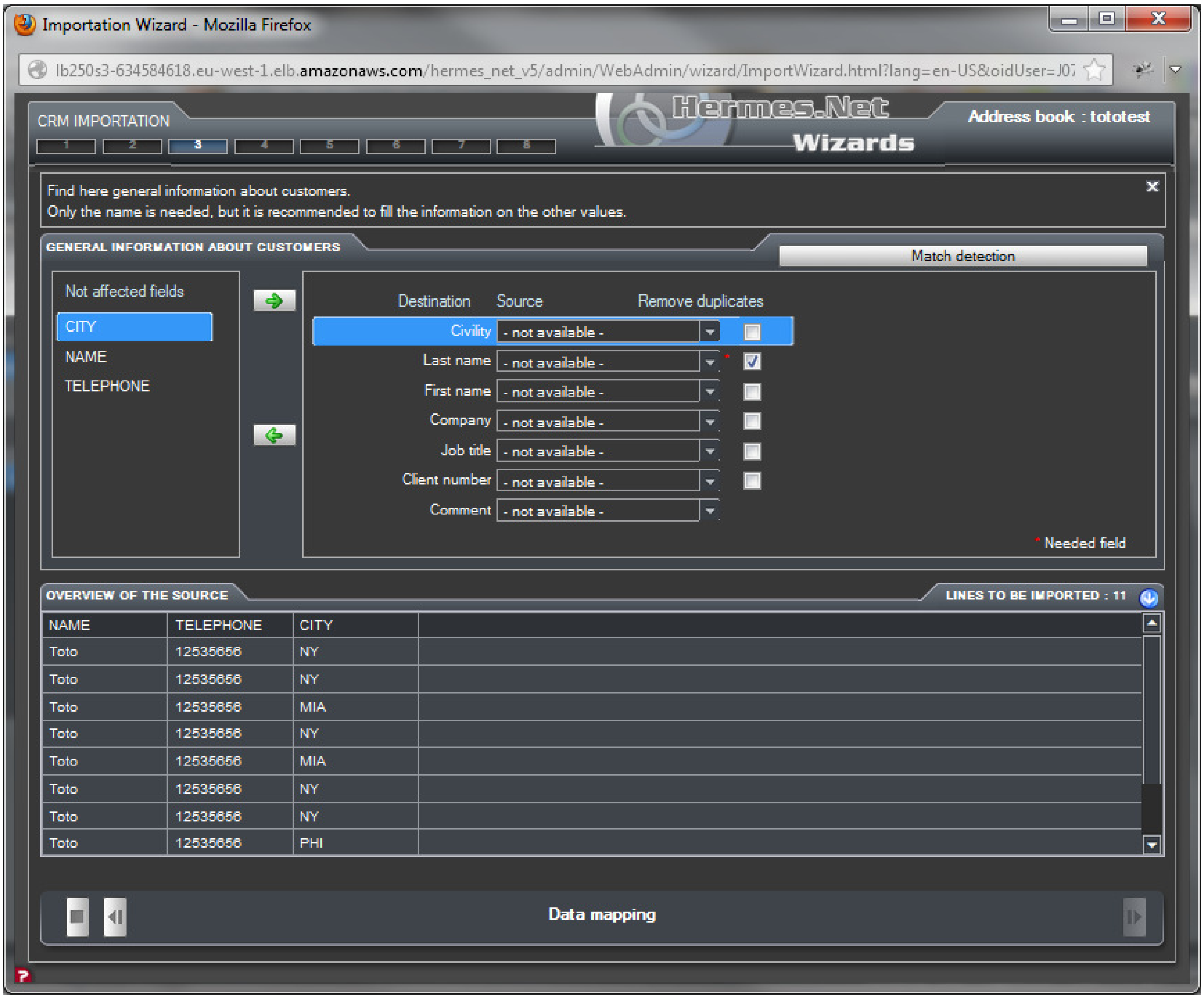
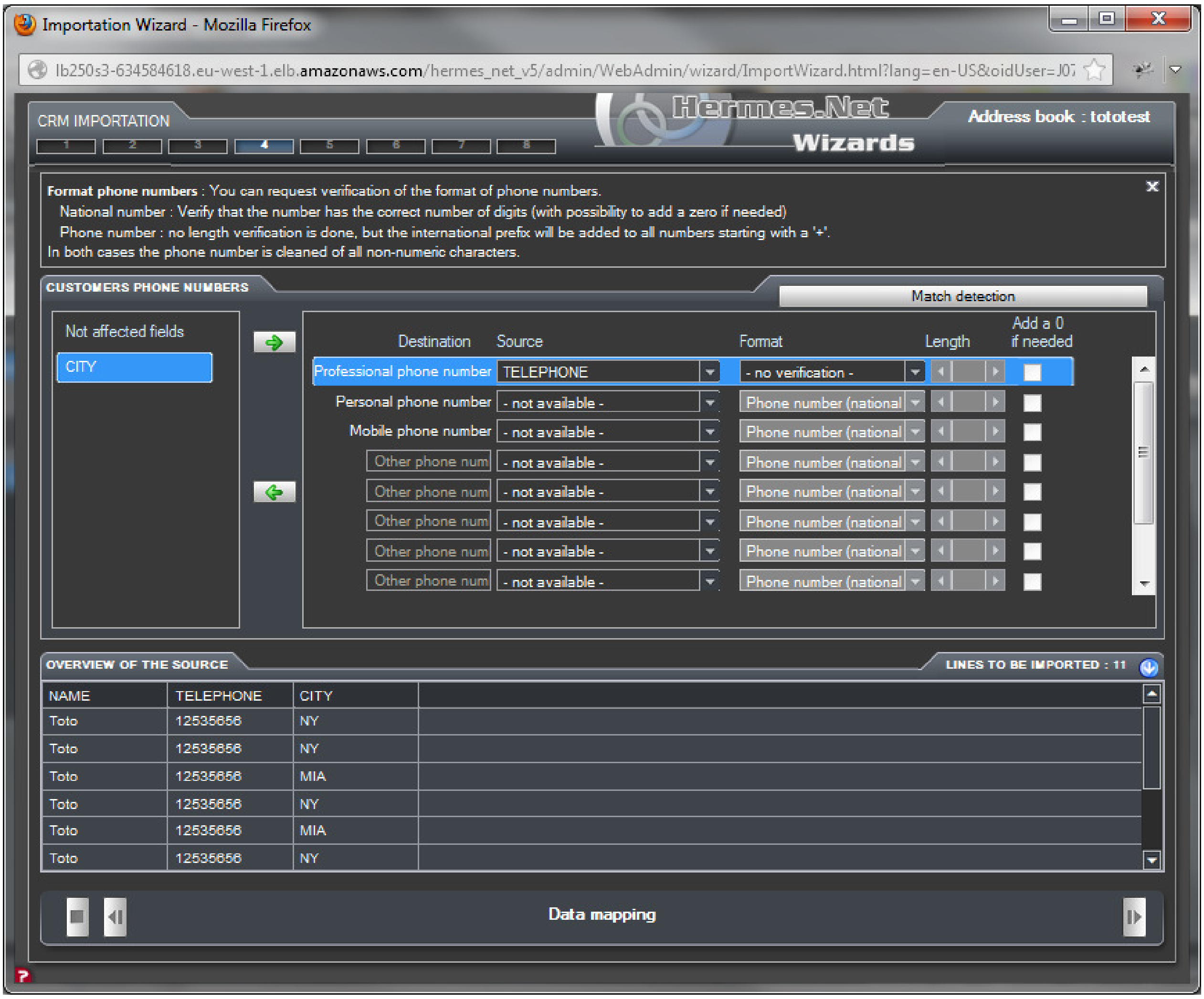
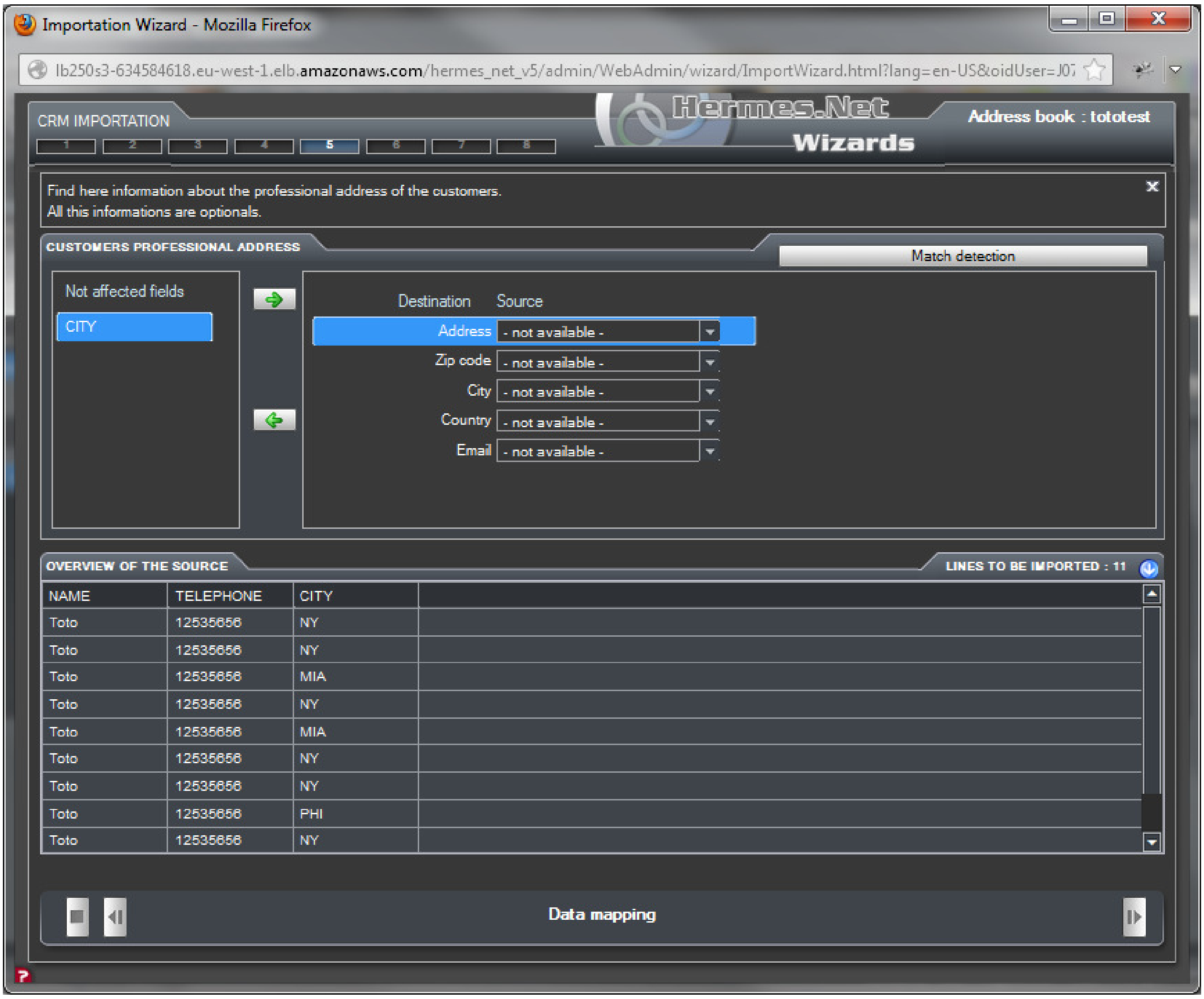
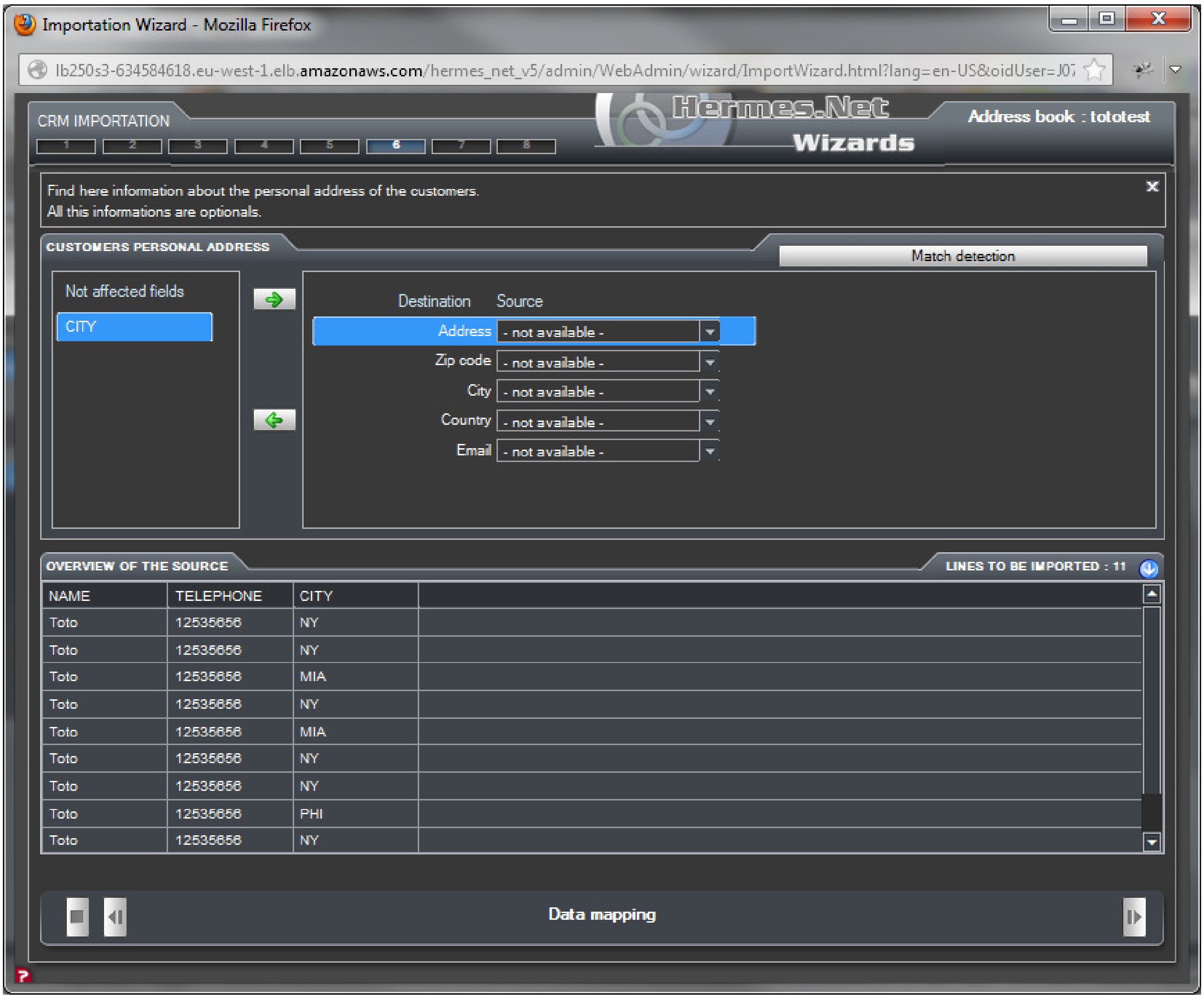
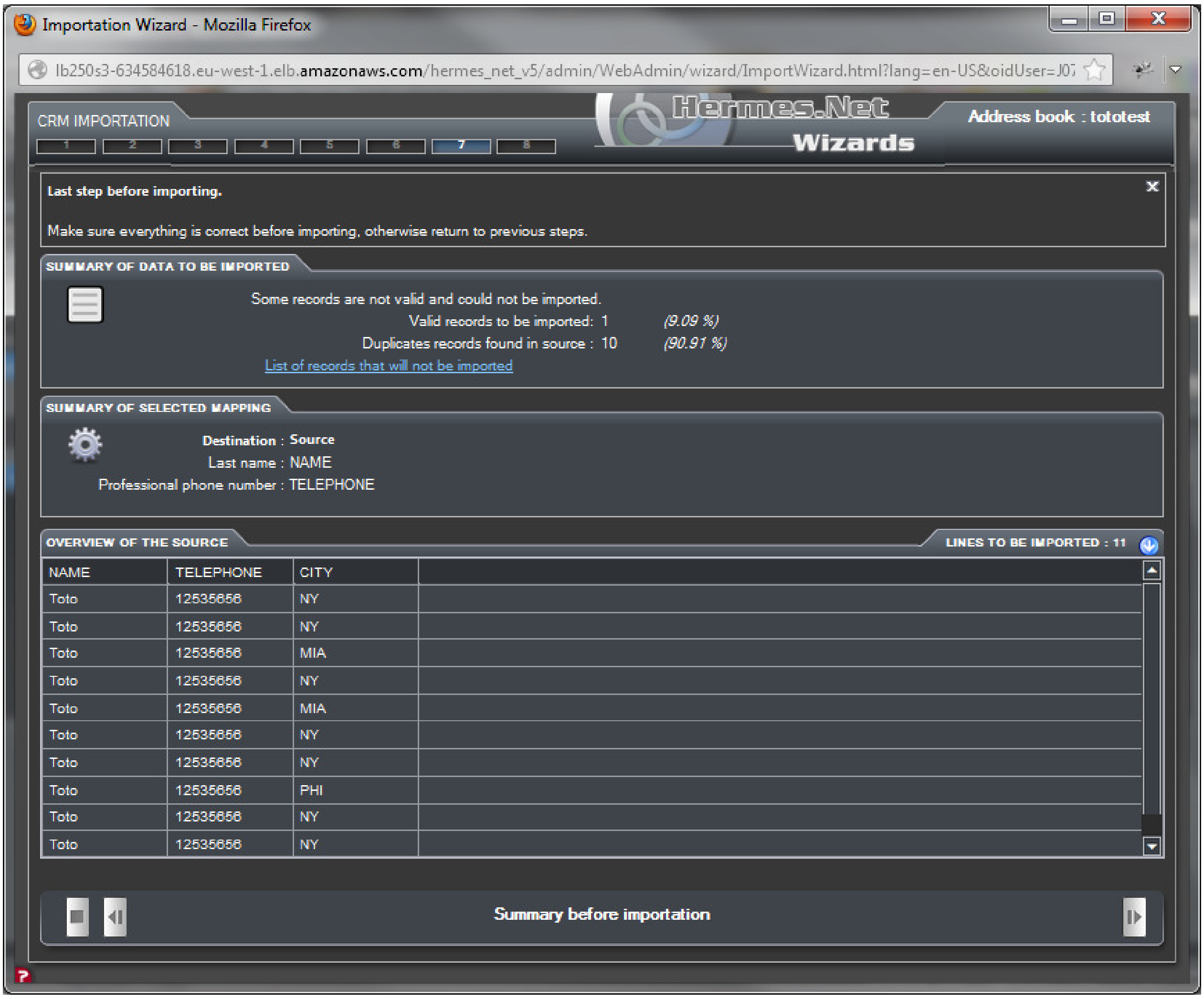
12535656
PHI
Data source selection

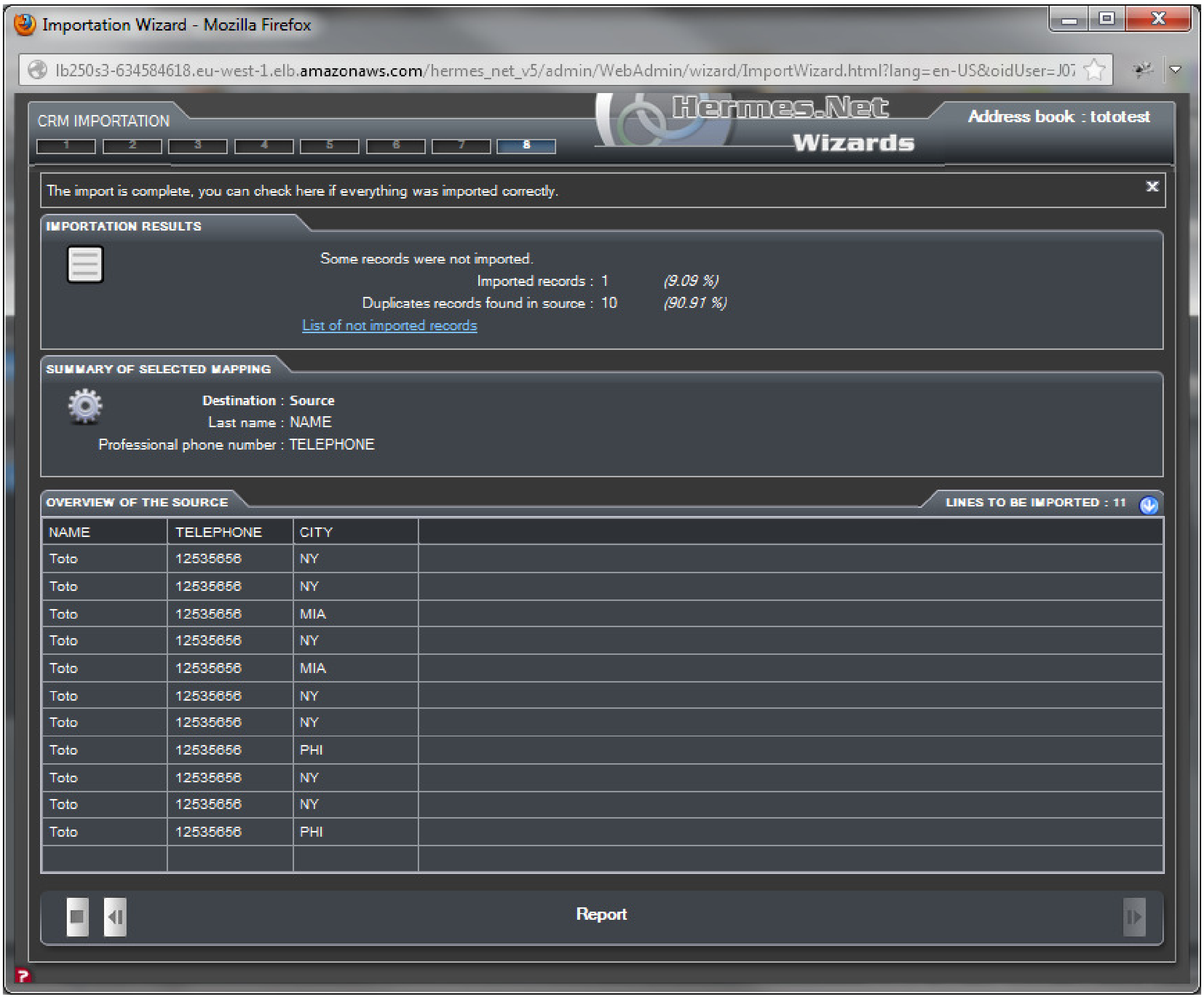

Importation Wizard - Mozilla Firefox
lb250s3-634584618.eu-west-1.elb.amazonaws.com/hermes_net_v5/admin/WebAdmin/wizard/ImportWizard.html?lang=en-US&oidUser=J07
CRM IMPORTATION
Hermes.Net
Wizards
Address book : tototest
Find here general information about customers.
Only the name is needed, but it is recommended to fill the information on the other values.
GENERAL INFORMATION ABOUT CUSTOMERS
Match detection
Not affected fields
CITY
NAME
TELEPHONE
Destination
Source
Remove duplicates
Civility
Last name
First name
Company
Job title
Client number
Comment
- not available -
* Needed field
OVERVIEW OF THE SOURCE
LINES TO BE IMPORTED : 11
NAME
TELEPHONE
CITY
Toto
12535656
NY
MIA
PHI
Data mapping


Importation Wizard - Mozilla Firefox
lb250s3-634584618.eu-west-1.elb.amazonaws.com/hermes_net_v5/admin/WebAdmin/wizard/ImportWizard.html?lang=en-US&oidUser=J07
CRM IMPORTATION
1 2 3 4 5 6 7 8
Hermes.Net
Wizards
Address book : tototest
Format phone numbers : You can request verification of the format of phone numbers.
National number : Verify that the number has the correct number of digits (with possibility to add a zero if needed)
Phone number : no length verification is done, but the international prefix will be added to all numbers starting with a '+'.
In both cases the phone number is cleaned of all non-numeric characters.
CUSTOMERS PHONE NUMBERS
Match detection
Not affected fields
CITY
Destination
Source
Format
Length
Add a 0 if needed
Professional phone number
TELEPHONE
- no verification -
Personal phone number
Mobile phone number
Other phone num
- not available -
Phone number (national
OVERVIEW OF THE SOURCE
LINES TO BE IMPORTED : 11
NAME
TELEPHONE
CITY
Toto
12535656
NY
MIA
Data mapping

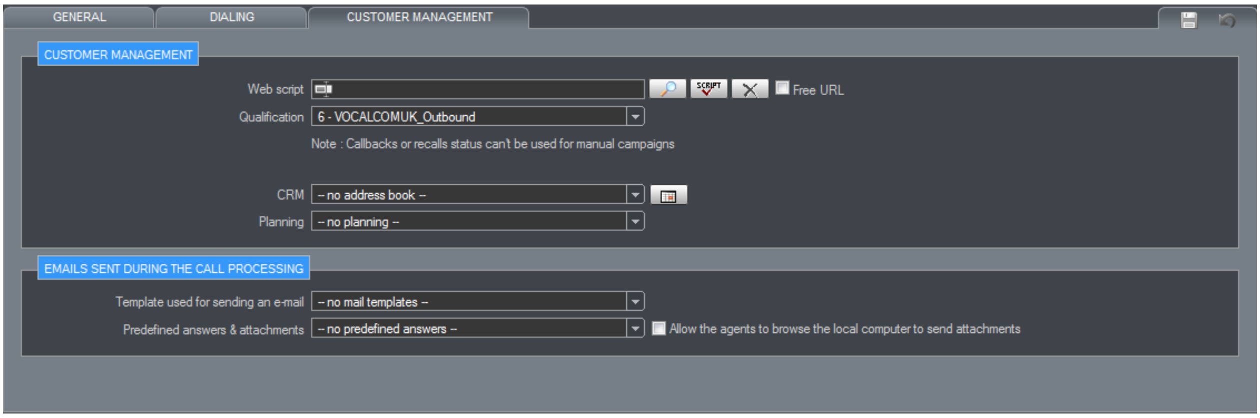

Importation Wizard - Mozilla Firefox
lb250s3-634584618.eu-west-1.elb.amazonaws.com/hermes_net_v5/admin/WebAdmin/wizard/ImportWizard.html?lang=en-US&oidUser=J07
CRM IMPORTATION
1 2 3 4 5 6 7 8
Hermes.Net
Wizards
Address book : tototest
Find here information about the professional address of the customers.
All this informations are optionals.
CUSTOMERS PROFESSIONAL ADDRESS
Match detection
Not affected fields
CITY
Destination
Source
Address - not available -
Zip code - not available -
City - not available -
Country - not available -
Email - not available -
OVERVIEW OF THE SOURCE
LINES TO BE IMPORTED : 11
NAME
TELEPHONE
CITY
Toto 12535656 NY
Toto 12535656 NY
Toto 12535656 MIA
Toto 12535656 NY
Toto 12535656 MIA
Toto 12535656 NY
Toto 12535656 NY
Toto 12535656 PHI
Toto 12535656 NY
Data mapping


Importation Wizard - Mozilla Firefox
lb250s3-634584618.eu-west-1.elb.amazonaws.com/hermes_net_v5/admin/WebAdmin/wizard/ImportWizard.html?lang=en-US&oidUser=J07
CRM IMPORTATION
Hermes.Net
Wizards
Address book : tototest
Find here information about the personal address of the customers.
All this informations are optionals.
CUSTOMERS PERSONAL ADDRESS
Match detection
Not affected fields
CITY
Destination
Source
Address
Zip code
City
Country
Email
- not available -
OVERVIEW OF THE SOURCE
LINES TO BE IMPORTED : 11
NAME
TELEPHONE
CITY
Toto
12535656
NY
MIA
PHI
Data mapping


Importation Wizard - Mozilla Firefox
lb250s3-634584618.eu-west-1.elb.amazonaws.com/hermes_net_v5/admin/WebAdmin/wizard/ImportWizard.html?lang=en-US&oidUser=J07
CRM IMPORTATION
Hermes.Net
Wizards
Address book : tototest
Last step before importing.
Make sure everything is correct before importing, otherwise return to previous steps.
SUMMARY OF DATA TO BE IMPORTED
Some records are not valid and could not be imported.
Valid records to be imported: 1 (9.09 %)
Duplicates records found in source : 10 (90.91 %)
List of records that will not be imported
SUMMARY OF SELECTED MAPPING
Destination : Source
Last name : NAME
Professional phone number : TELEPHONE
OVERVIEW OF THE SOURCE
LINES TO BE IMPORTED : 11
NAME TELEPHONE CITY
Toto 12535656 NY
Toto 12535656 NY
Toto 12535656 MIA
Toto 12535656 NY
Toto 12535656 MIA
Toto 12535656 NY
Toto 12535656 NY
Toto 12535656 PHI
Toto 12535656 NY
Toto 12535656 NY
Summary before importation


Importation Wizard - Mozilla Firefox
lb250s3-634584618.eu-west-1.elb.amazonaws.com/hermes_net_v5/admin/WebAdmin/wizard/ImportWizard.html?lang=en-US&oidUser=J07
CRM IMPORTATION
1 2 3 4 5 6 7 8
Hermes.Net
Wizards
Address book : tototest
The import is complete, you can check here if everything was imported correctly.
IMPORTATION RESULTS
Some records were not imported.
Imported records : 1 (9.09 %)
Duplicates records found in source : 10 (90.91 %)
List of not imported records
SUMMARY OF SELECTED MAPPING
Destination : Source
Last name : NAME
Professional phone number : TELEPHONE
OVERVIEW OF THE SOURCE
LINES TO BE IMPORTED : 11
NAME TELEPHONE CITY
Toto 12535656 NY
Toto 12535656 NY
Toto 12535656 MIA
Toto 12535656 NY
Toto 12535656 MIA
Toto 12535656 NY
Toto 12535656 NY
Toto 12535656 PHI
Toto 12535656 NY
Toto 12535656 NY
Toto 12535656 PHI
Report

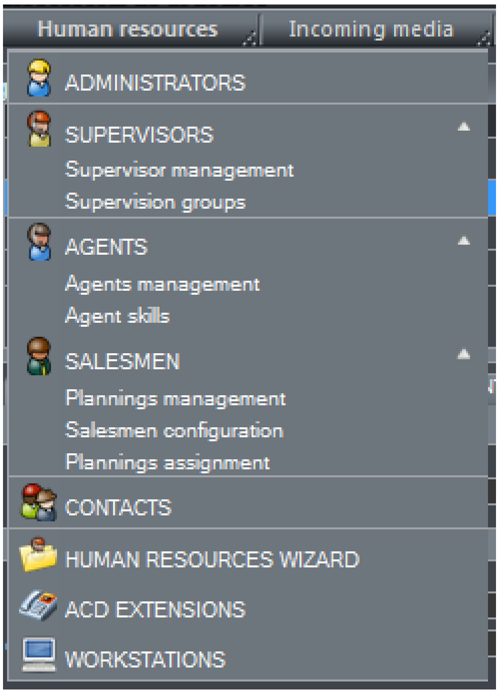
Save your address book, and go back to your campaign. Under the **"Customer management"** tab, select the **"CRM"** and save.



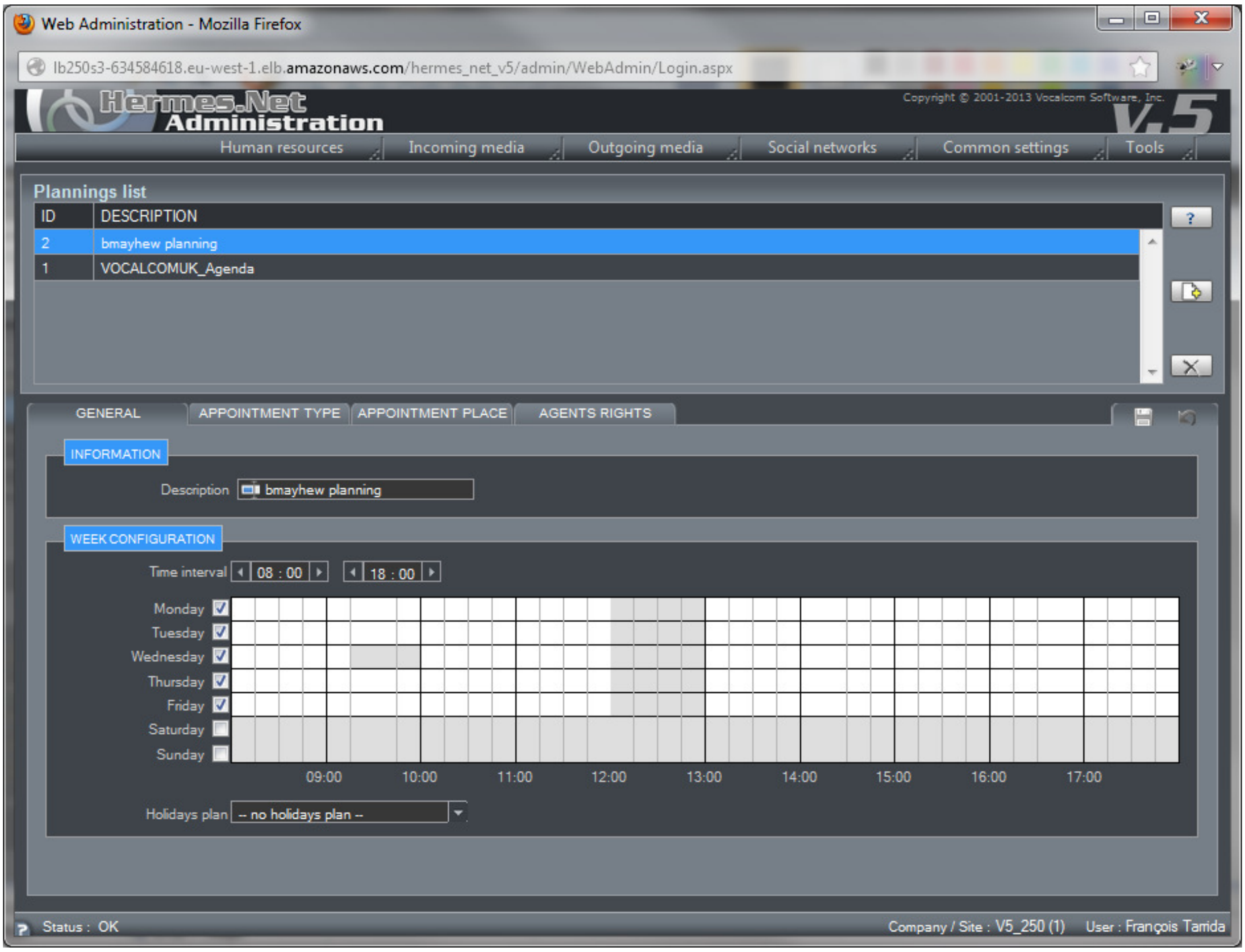
10- Creating the Salesmen planning

Once the address book is created, you'll need to create a salesmen planning for your salesmen, which you will then join to the campaign.

Click on **"Human resources",** then under **"Salesmen**", and select **"Plannings management".**



Click on **"Add"** to create a new planning.



You can configure different tabs :

General : daily times for a standard week, each hour is divided in quarter-hours that you can grey out, thus rendering them unavailable in the planning. You can also choose a holidays plan for the planning.

Appointment type : various types of appointments, you can give each a standard lenght, and the agents will be able to choose from the list when taking an appointment.

Appointment place : various places for appointments, you can give each a name, and the agents will be able to choose from the list when taking an appointment.

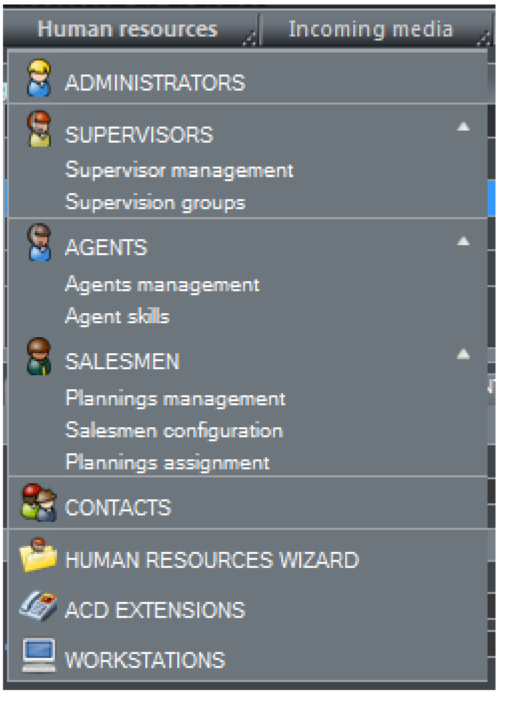
Agents rights : agents rights when taking appointments on the agenda.

NOTE: when an agent takes an appointment for a salesman in the agenda, the change is immediate for all agents working on the same agenda.

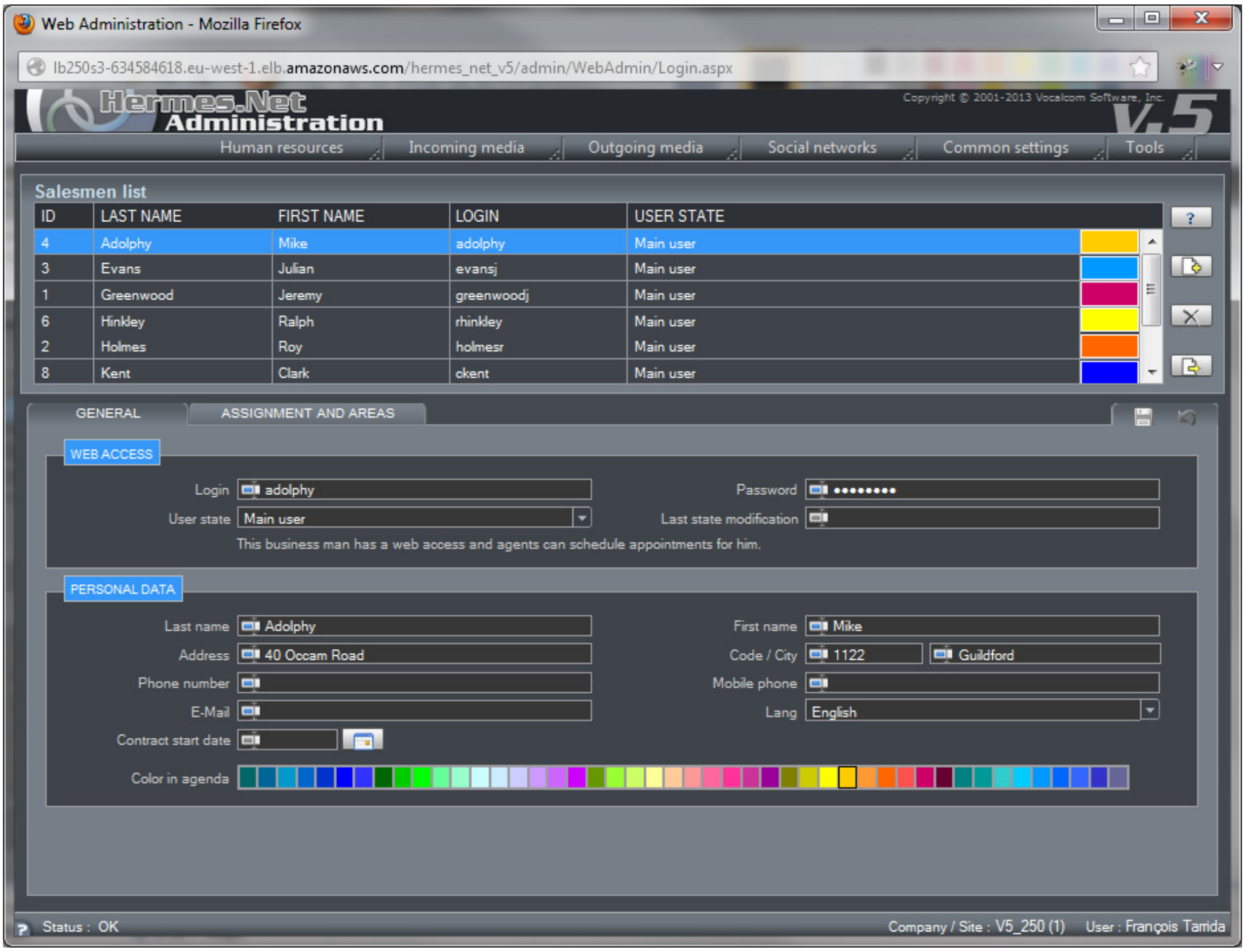
11- Creating the salesmen

Planning is created; you must now create salesmen accounts.

Click on **"Human resources",** then under **"Salesmen"** select **"Salesmen configuration".**



Click on **"Add"** to create a new salesman account.

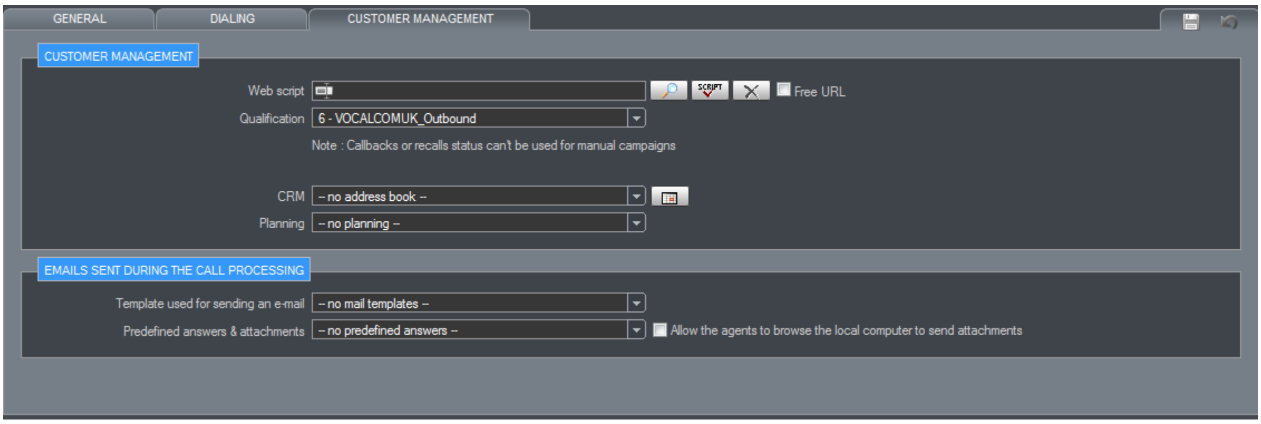


You can configure the different tabs :

General : login and password (optional) of the salesman, his personal data, and his color code as it will appear in the agenda. Please also select a user state, and fill in his email address, with it when an appointment is taken agents can send him an email alert.

Assignment and areas : select your planning, then fill in geographical zones (optional) and quotas on his appointments (optional).

Save your address book, and go back to your campaign. Under the **« Customer management »** tab, in **« Planning »,** select the planning you've just created and save.



12- 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 complete campaign should look something like this: