

Email campaign management **Hermes.Net V5**



What is this document?

The aim of this document is to explain how to create and install step by step an email 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 AN EMAIL 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 a queue
- 6 – Create your campaign and set up the general parameters
- 7 – Link an email account
- 8 – Create agent accounts (*if necessary*)
- 9 – Create or assign your supervisors
- 10 – Create or assign your service hours
- 11 – Create or assign your holidays plan
- 12 – Creating or assigning call qualifications
- 13 – Create your address book (*if using agenda*)
- 14 – Create or assign your salesmen's planning (*if using agenda*)
- 15 – Create or assign your salesmen (*if using agenda*)
- 16 – Check the summary of your campaign

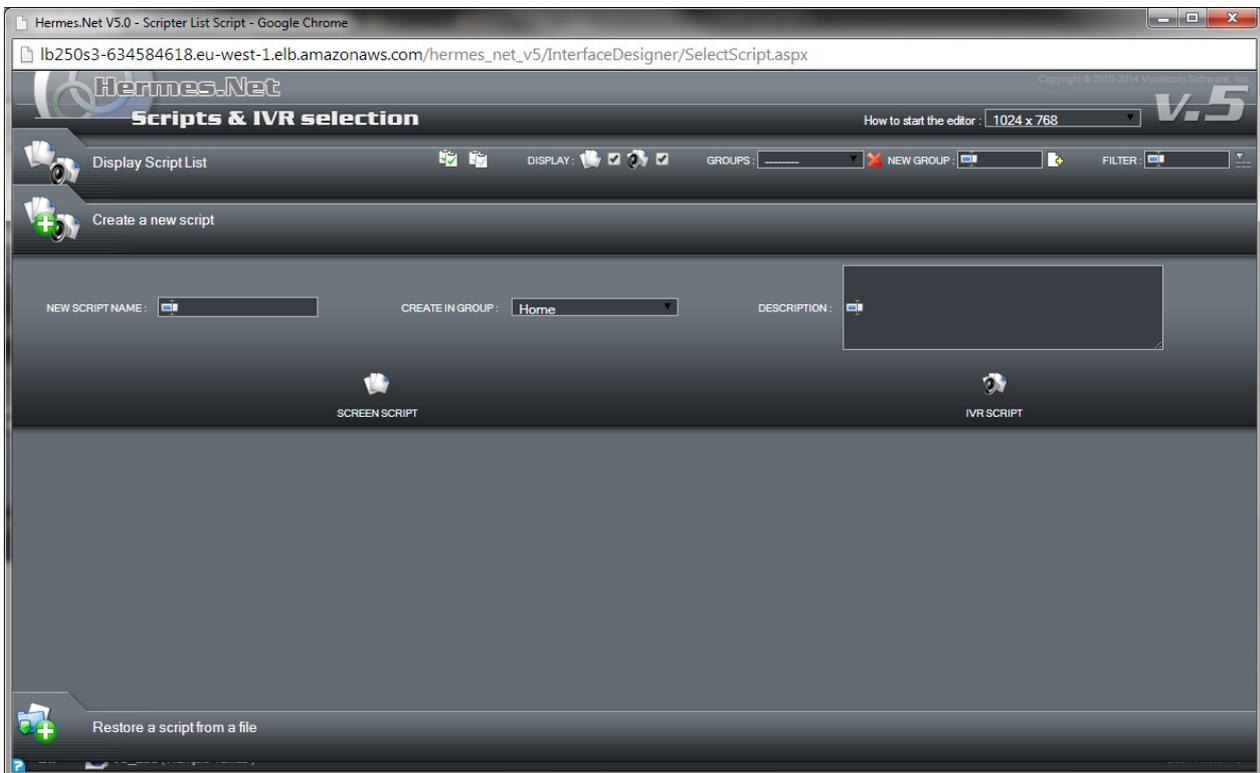
What to do in the Interface Designer module



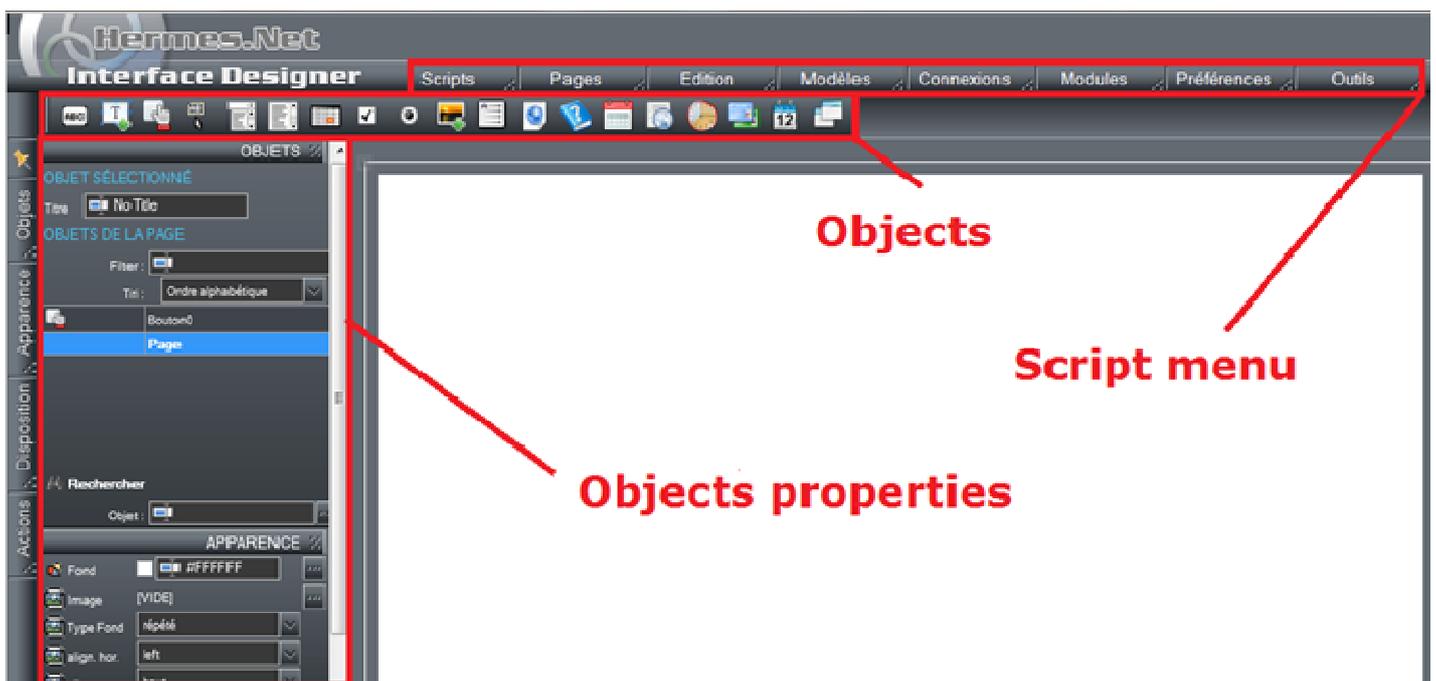
1- Create your script

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.

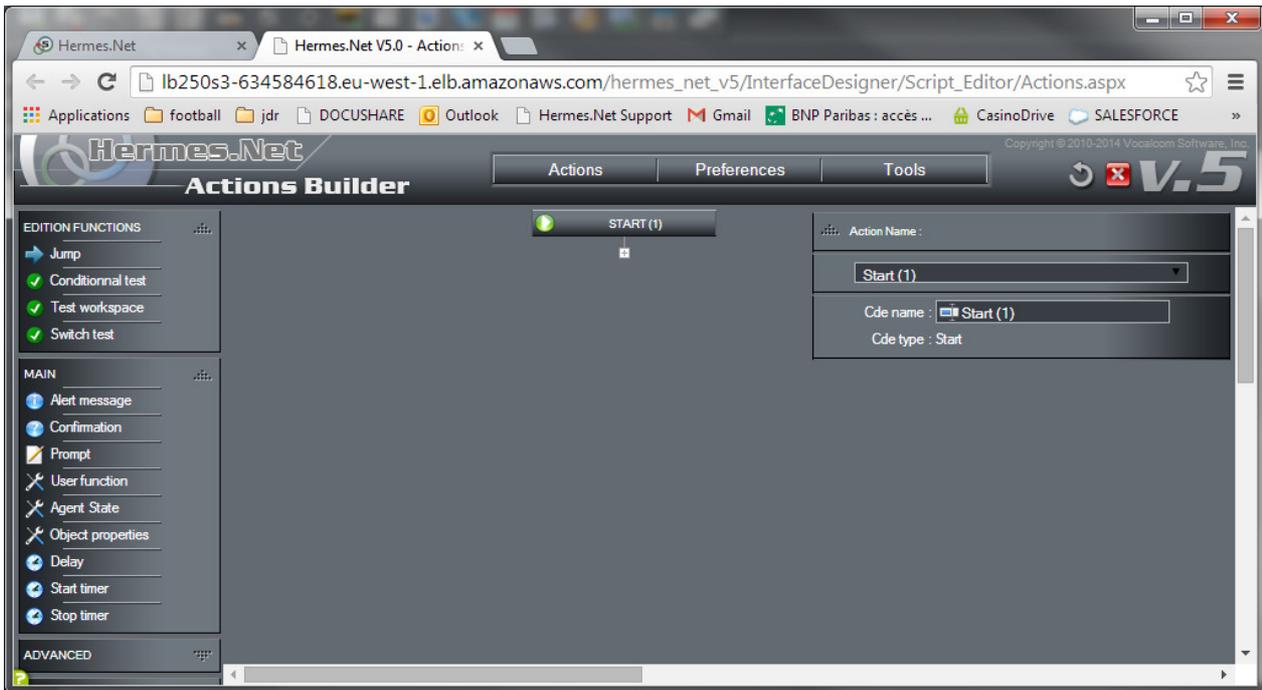
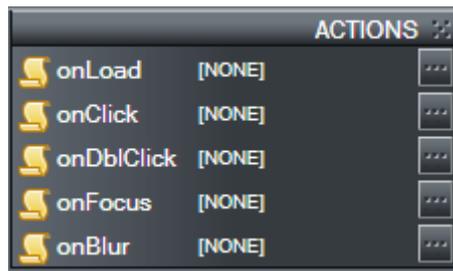
In the module, click on « **Create a new script** » and create a new screen script, give it a name and a description.
Once the script is created, you can access it directly from the home menu Hermes V5 through the function « **Edit this script** ».



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.

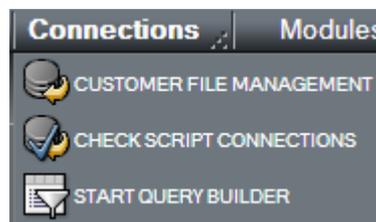


For more help on the actions, please refer to the **“Interface Designer”** document, existing for V5.

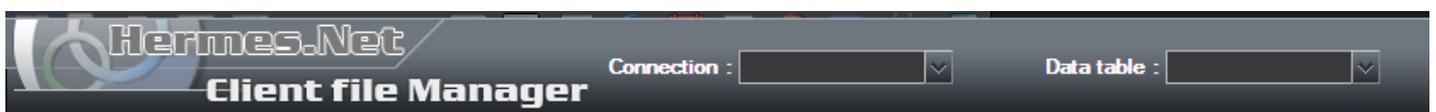
2- Create the Client file

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 »**:

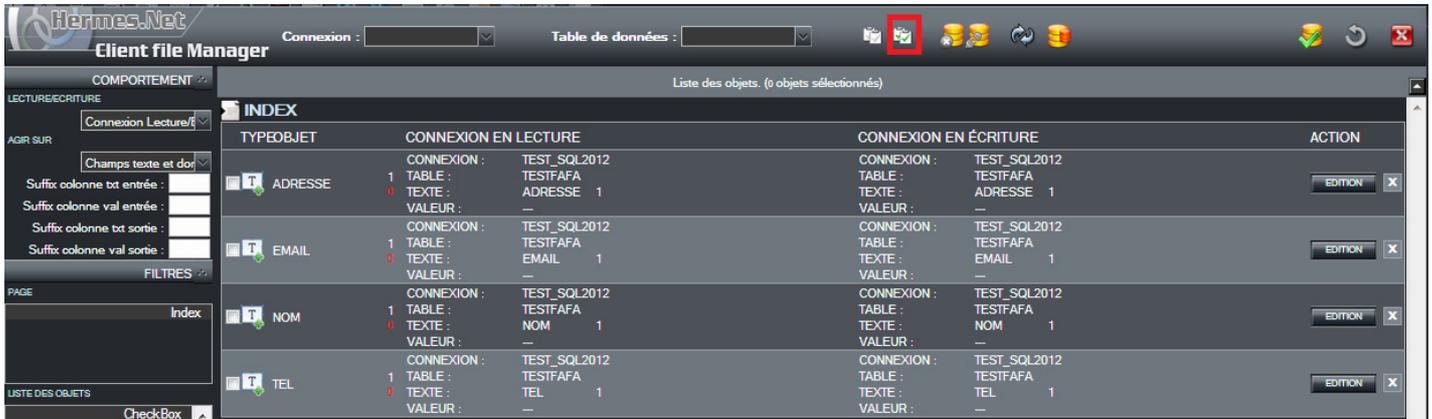


Choose the **Connection**, and create a new data table in **Data table**:



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.

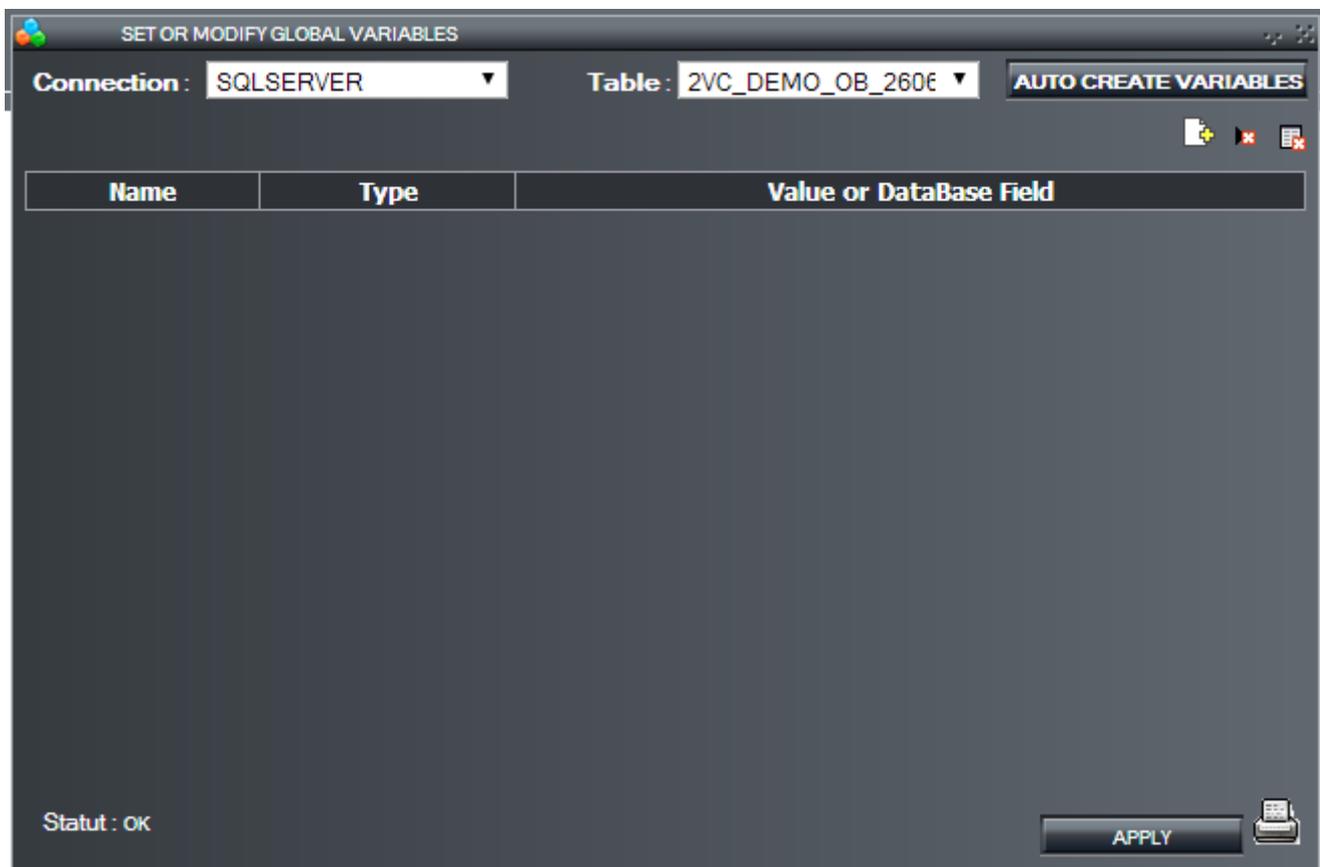
3- Create your global variables

Once your 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.

SET OR MODIFY GLOBAL VARIABLES

Connection : Table :

Name	Type	Value or DataBase Field		
\$INDICE	Bind To DataBase	SQLSERVER	2VC_DEMO_OB_2...	INDICE
\$GUID_CONTACT_ID	Bind To DataBase	SQLSERVER	2VC_DEMO_OB_2...	GUID_CONTACT_ID
\$City	Bind To DataBase	SQLSERVER	2VC_DEMO_OB_2...	City
\$Comments	Bind To DataBase	SQLSERVER	2VC_DEMO_OB_2...	Comments
\$Country	Bind To DataBase	SQLSERVER	2VC_DEMO_OB_2...	Country
\$County	Bind To DataBase	SQLSERVER	2VC_DEMO_OB_2...	County
\$Email	Bind To DataBase	SQLSERVER	2VC_DEMO_OB_2...	Email
\$FirstName	Bind To DataBase	SQLSERVER	2VC_DEMO_OB_2...	FirstName
\$House	Bind To DataBase	SQLSERVER	2VC_DEMO_OB_2...	House
\$LastName	Bind To DataBase	SQLSERVER	2VC_DEMO_OB_2...	LastName
\$Phone	Bind To DataBase	SQLSERVER	2VC_DEMO_OB_2...	Phone

Statut :



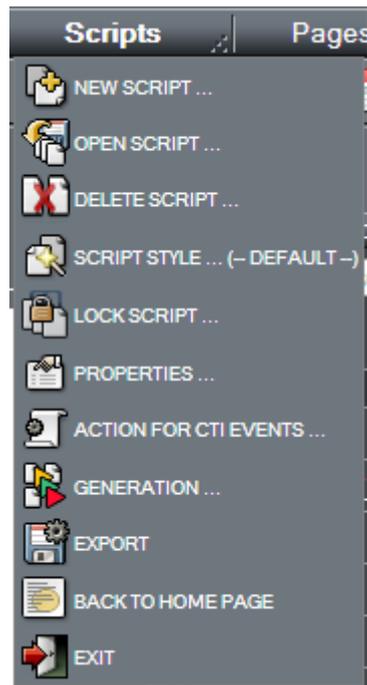


NOTE: In case you have variables only appearing in actions, remember to add them manually to the list of global variables with an "empty" value.

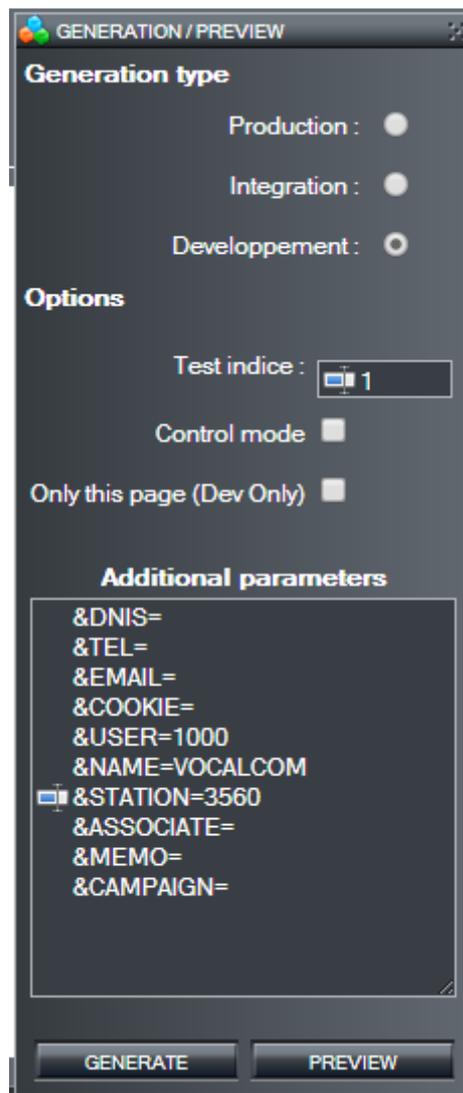
4- Generate the script in production mode

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

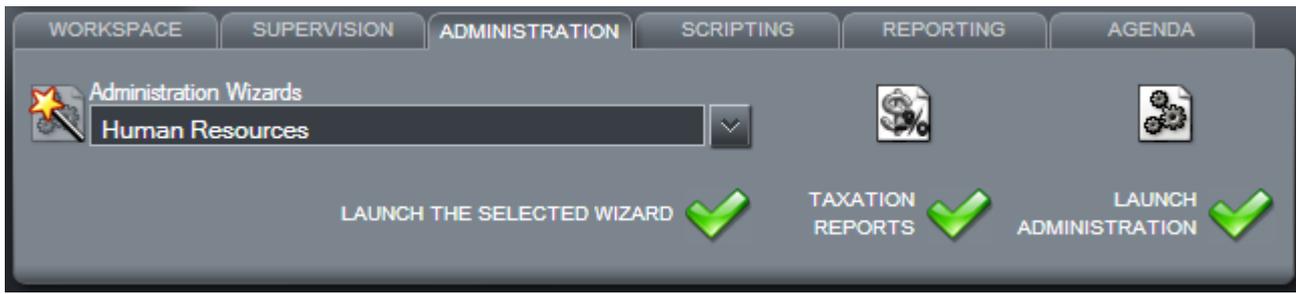
Click on the **"Scripts"** menu, and select **"Generation"**:



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

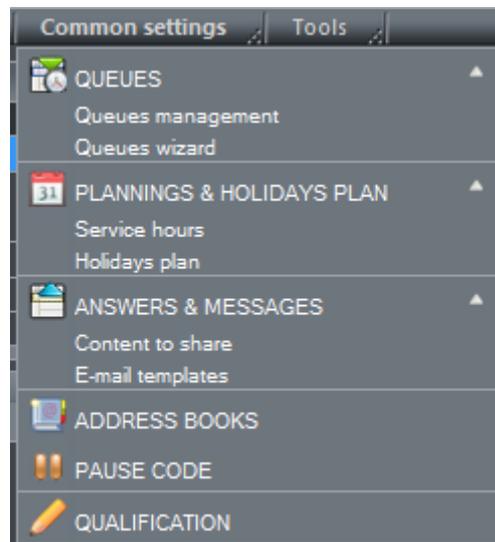


What to do in the Administration module

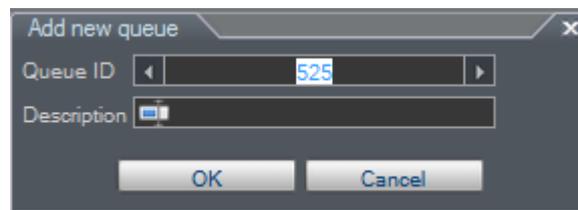


5- Create a queue

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



Click on « **Add** »  to create a new queue. Give it Queue ID you want and a description.

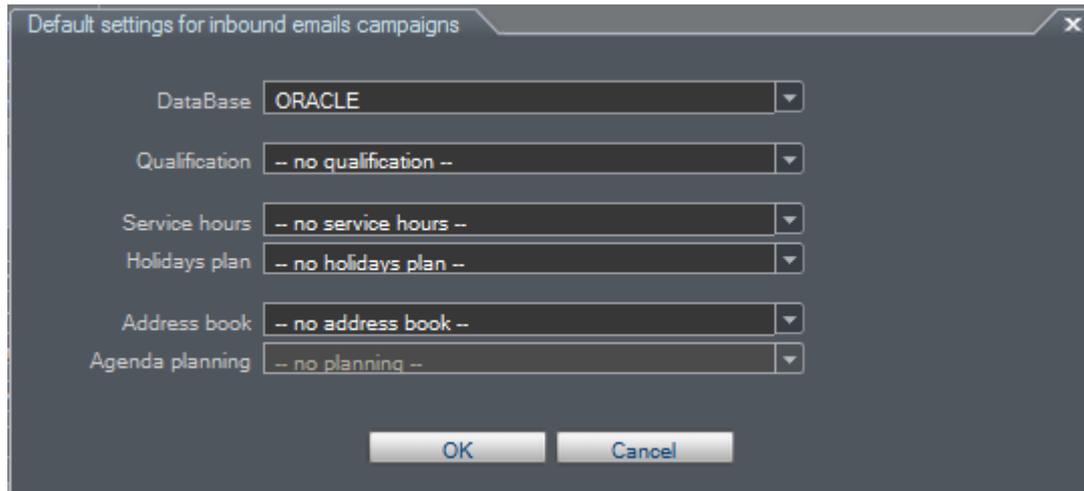


6- Create your campaign and set up the general parameters

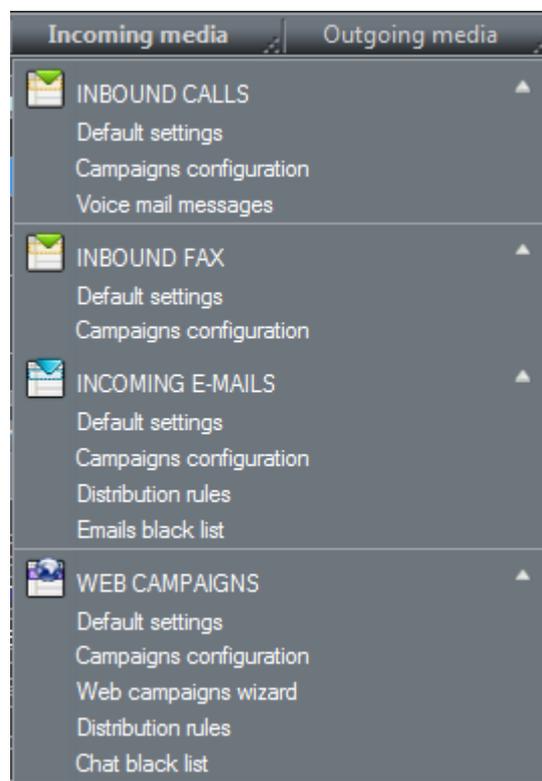
Now that your queue is ready, your script is created and published; you have to create your campaign, by joining together all the elements necessary for it to run smoothly. A campaign is nothing but a series of vital parts linked together, that will interact with the telephony. Some elements are **mandatory**,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



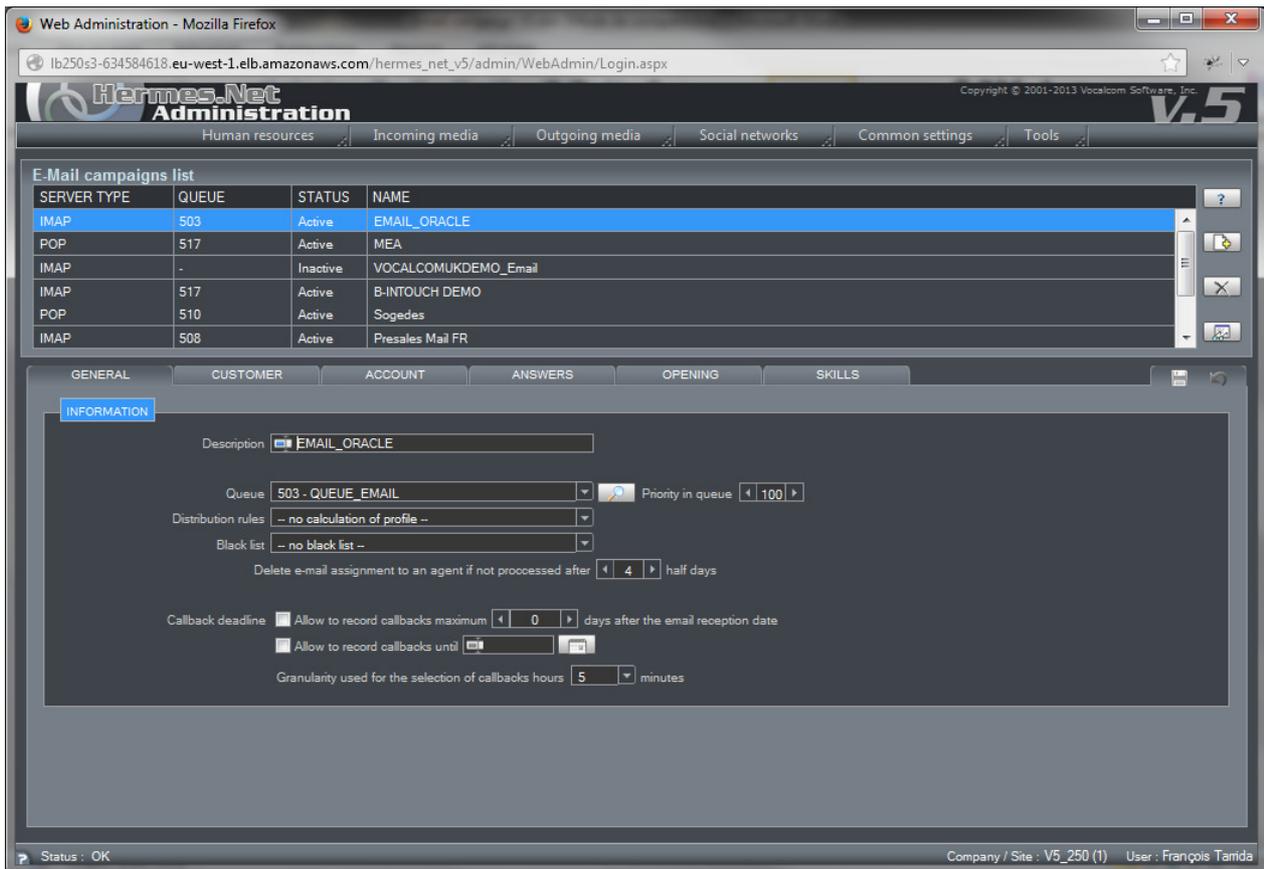
NOTE: The "Default Settings" sub-menu allows you to create parameters for all your email campaigns, applied by default.



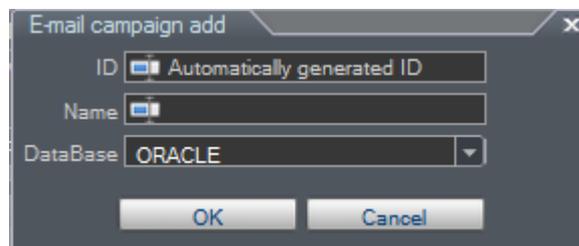
Click on the « **Incoming media** » menu, and select « **Campaigns configuration** » :



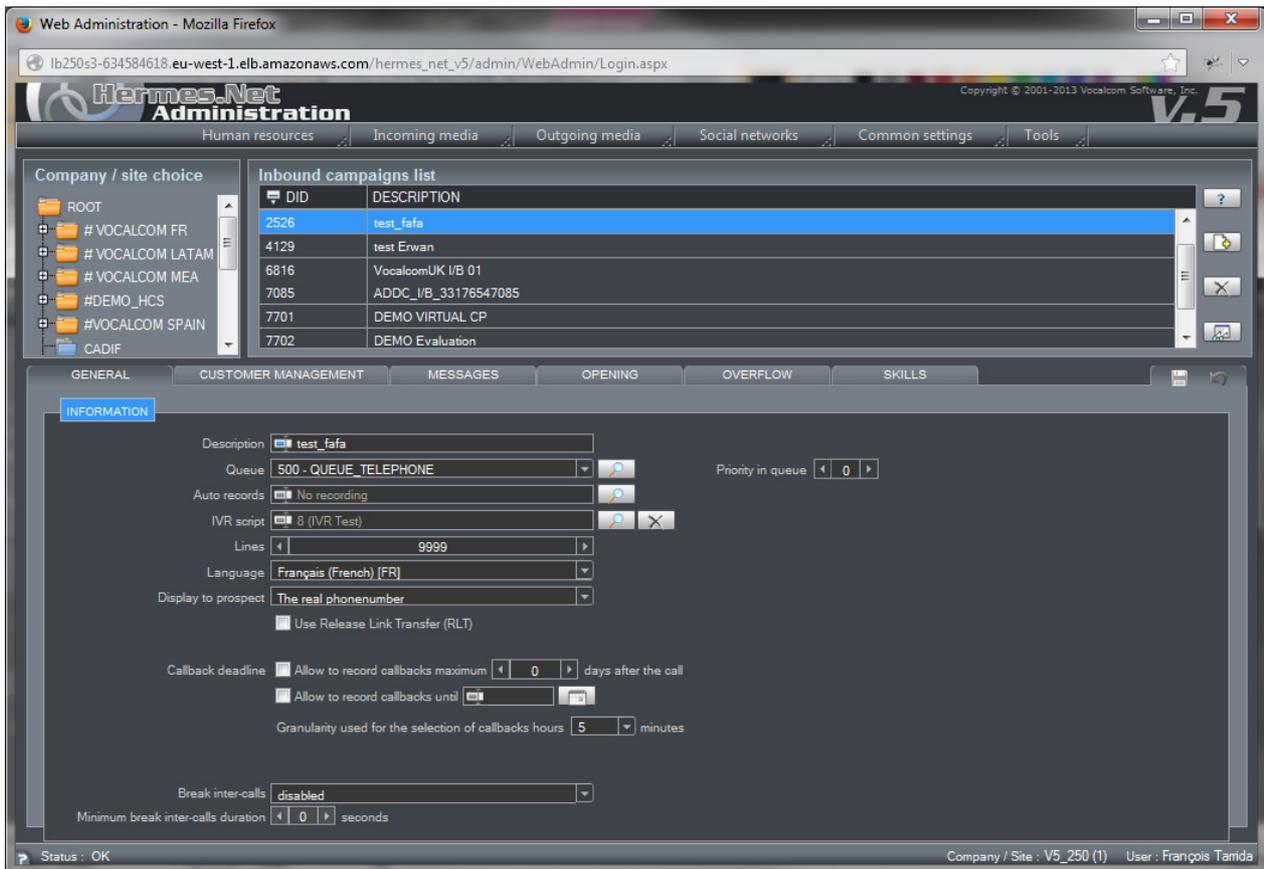
Click on « **Add new** »  to create a new campaign:



Choose the name of the campaign you want, the database, and then click on "OK ».



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



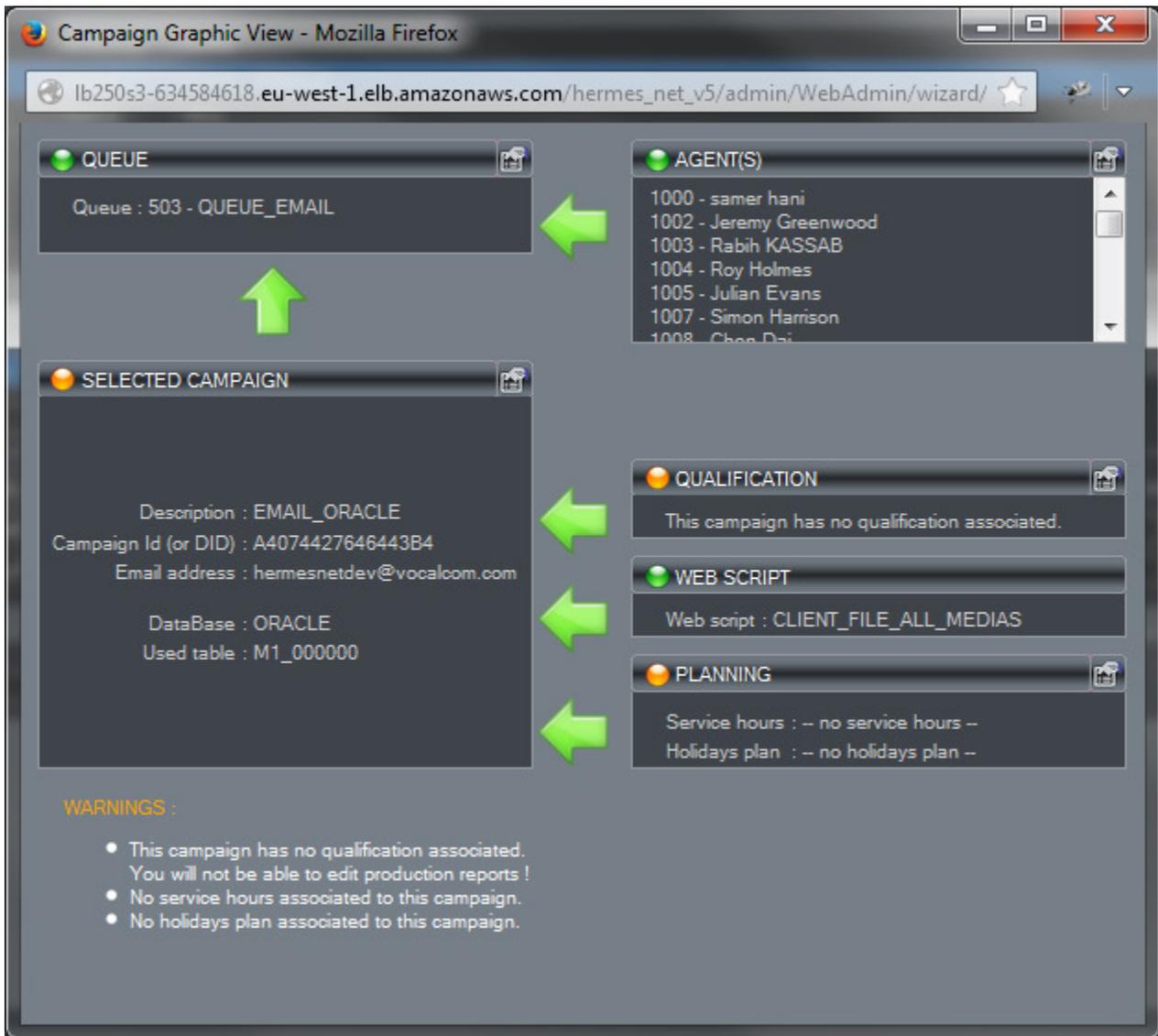
The screenshot shows the Hermes.Net Administration V.5 interface. At the top, there's a navigation bar with tabs: Human resources, Incoming media, Outgoing media, Social networks, Common settings, and Tools. On the left, a 'Company / site choice' sidebar lists folders like # VOCALCOM FR, # VOCALCOM LATAM, # VOCALCOM MEA, #DEMO_HCS, #VOCALCOM SPAIN, and CADIF. The main area displays an 'Inbound campaigns list' table:

DID	DESCRIPTION
2526	test_fafa
4129	test Erwan
6816	VocalcomUK I/B 01
7085	ADDC_I/B_33176547085
7701	DEMO VIRTUAL CP
7702	DEMO Evaluation

Below the table is the 'INFORMATION' configuration panel for the selected campaign. It includes fields for Description (test_fafa), Queue (500 - QUEUE_TELEPHONE), Auto records (No recording), IVR script (0 (IVR Test)), Lines (9999), Language (Français (French) [FR]), Display to prospect (The real phonenumber), and checkboxes for 'Use Release Link Transfer (RLT)', 'Allow to record callbacks maximum', and 'Allow to record callbacks until'. It also has input fields for 'days after the call', 'minutes', and 'seconds' for callback settings, and a 'Break inter-calls' dropdown set to 'disabled'.

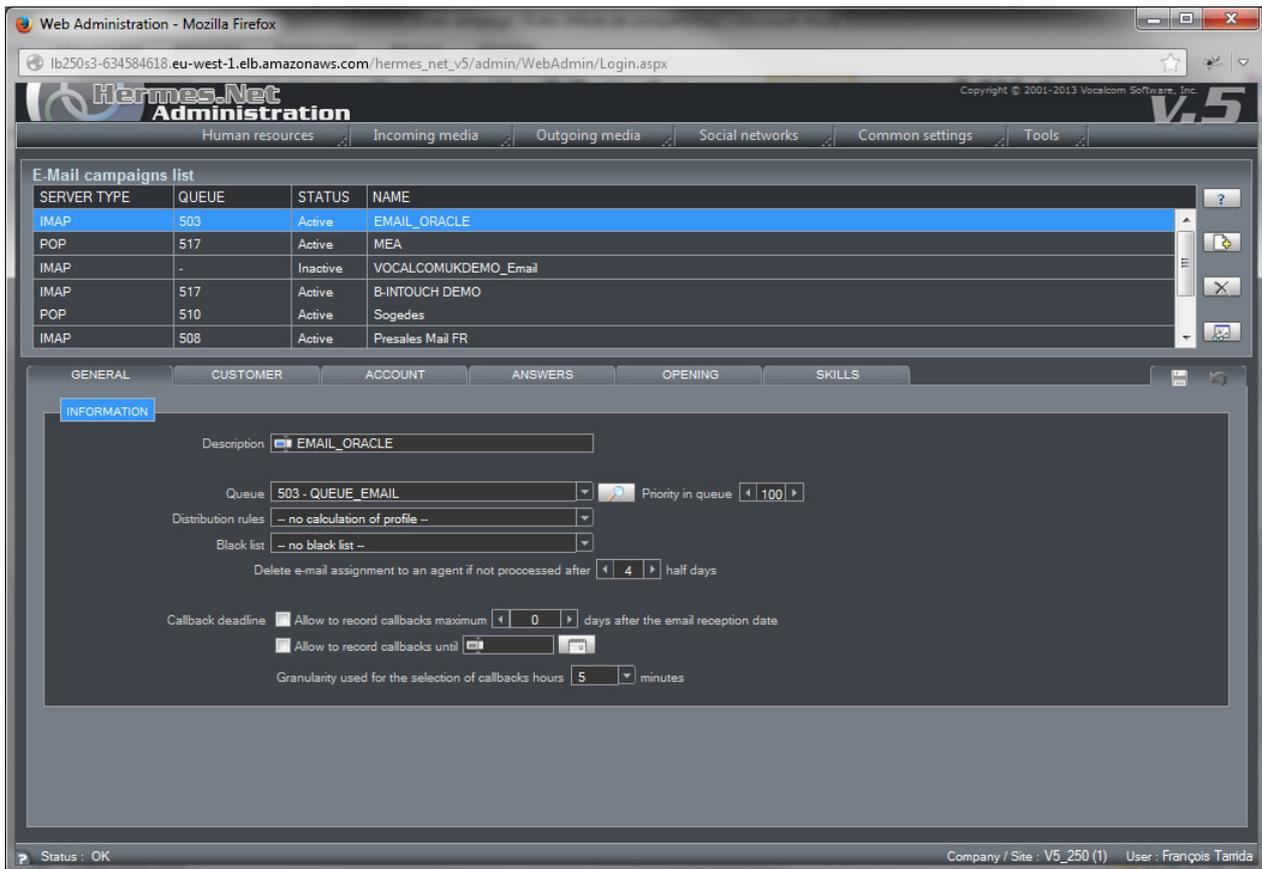
You have a very useful diagnostic tool at your disposal, the **Campaign Summary** that can tell you which elements are present or missing on your campaign at all times. **We recommend you use this tool often when creating your first campaign.**





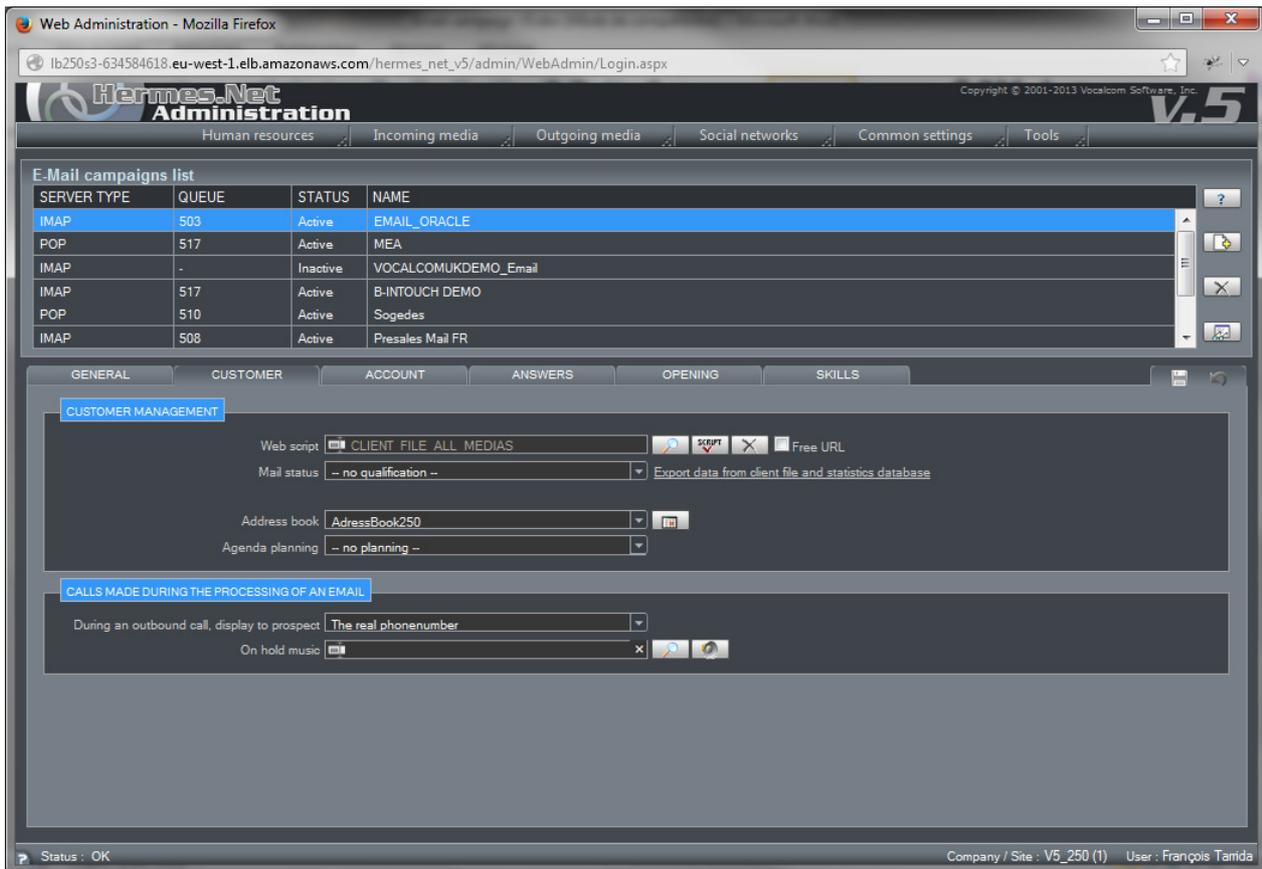
- A green dot means the element is set up correctly.
- An orange dot means that alerts have been detected. The campaign could be started, but maybe won't work correctly.
- A red dot means that alerts have been detected. The campaign won't work at all.

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



- the **queue** previously created
- the priority in queue (if several campaigns use the same queue)
- Distribution rules
- Black list**
- Email assignment rules
- Callback deadline: the general rules that apply to agents when create callback reminders about this campaign**

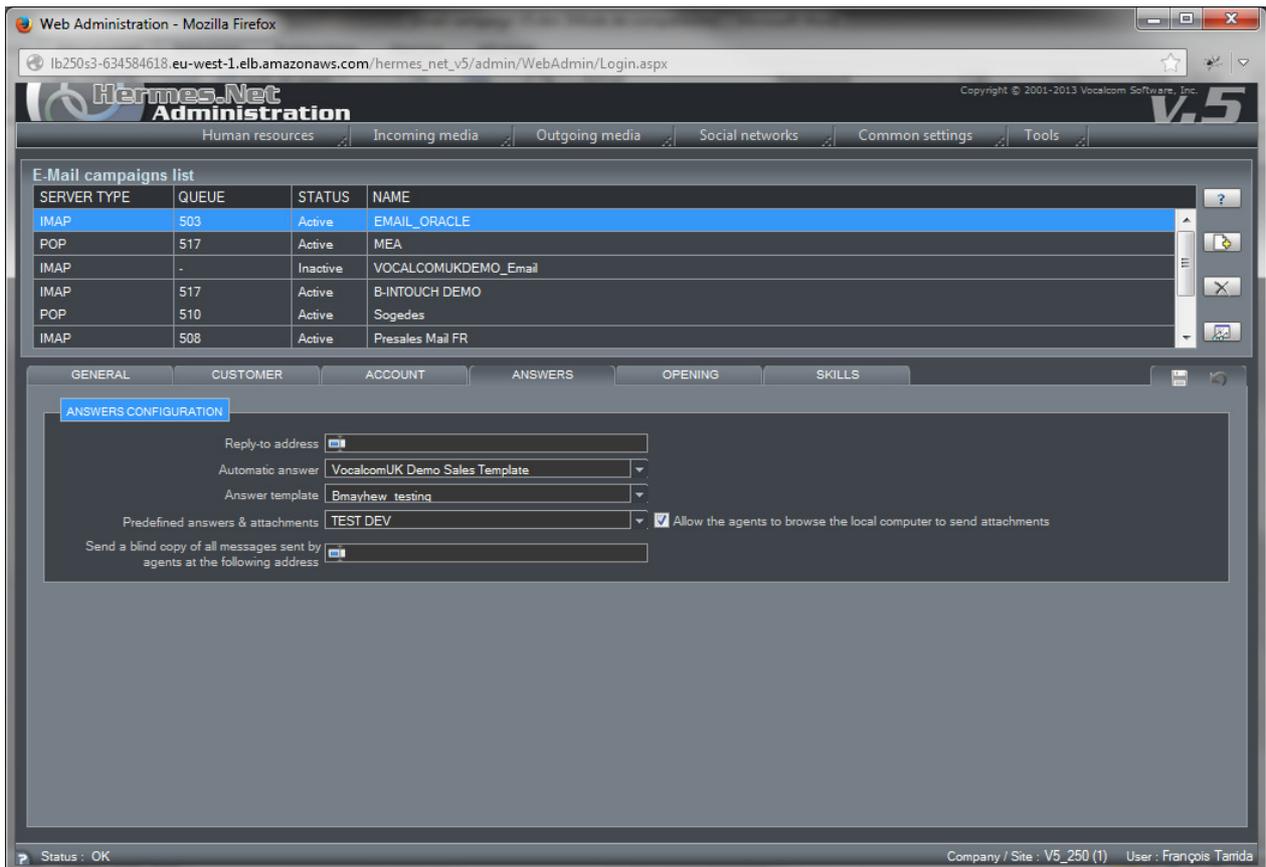
Under the "**Customer**" tab, you can now set up:



SERVER TYPE	QUEUE	STATUS	NAME
IMAP	503	Active	EMAIL_ORACLE
POP	517	Active	MEA
IMAP	-	Inactive	VOCALCOMUKDEMO_Email
IMAP	517	Active	B-INTOUCH DEMO
POP	510	Active	Sogedes
IMAP	508	Active	Presales Mail FR

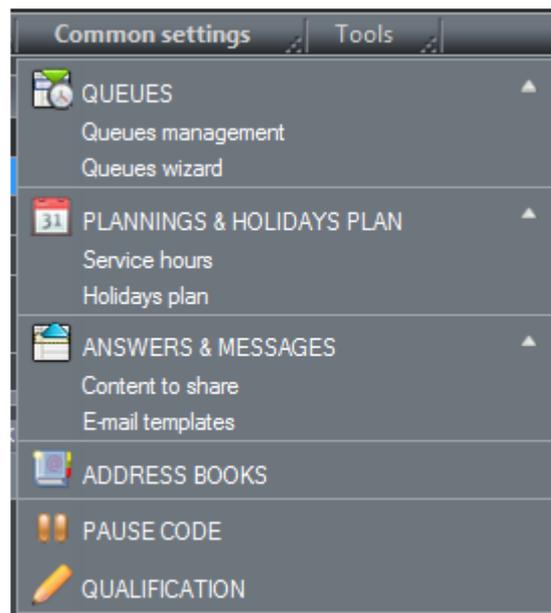
- **Web script:** select the screen script you have created.
- **Supporting Actions:** if the desired workspace supports email campaigns email settings.

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



- Reply-to address (*meaning : sender address for your emails*)
- Automatic answer
- Answer template
- Predefined answer & attachments
- Hidden recipient

NOTE – Most of these elements are created in the **“Common settings”** menu:

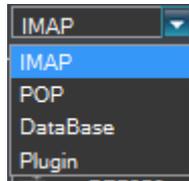


We'll set up the other parameters later.

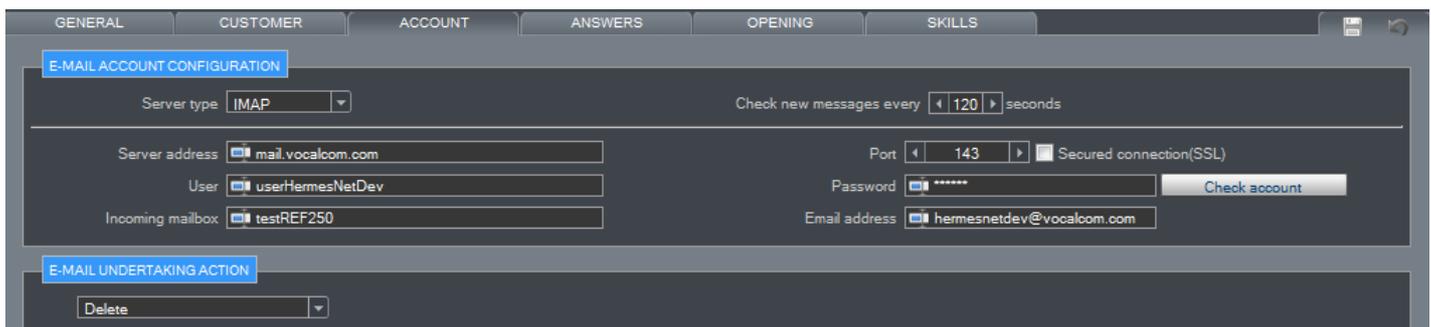
For skills to be set on campaigns and agents, please refer to « **Skills in Hermes.net** » document.

7- Linking an email account

Obviously, the critical element in the campaign is the account you want to link it to. You can use several server types:



Next, configure the different elements related to the account:



You can then decide what to do with emails being dealt with by the agents, and how often the email inbox refreshes itself.

8- Creating agents accounts

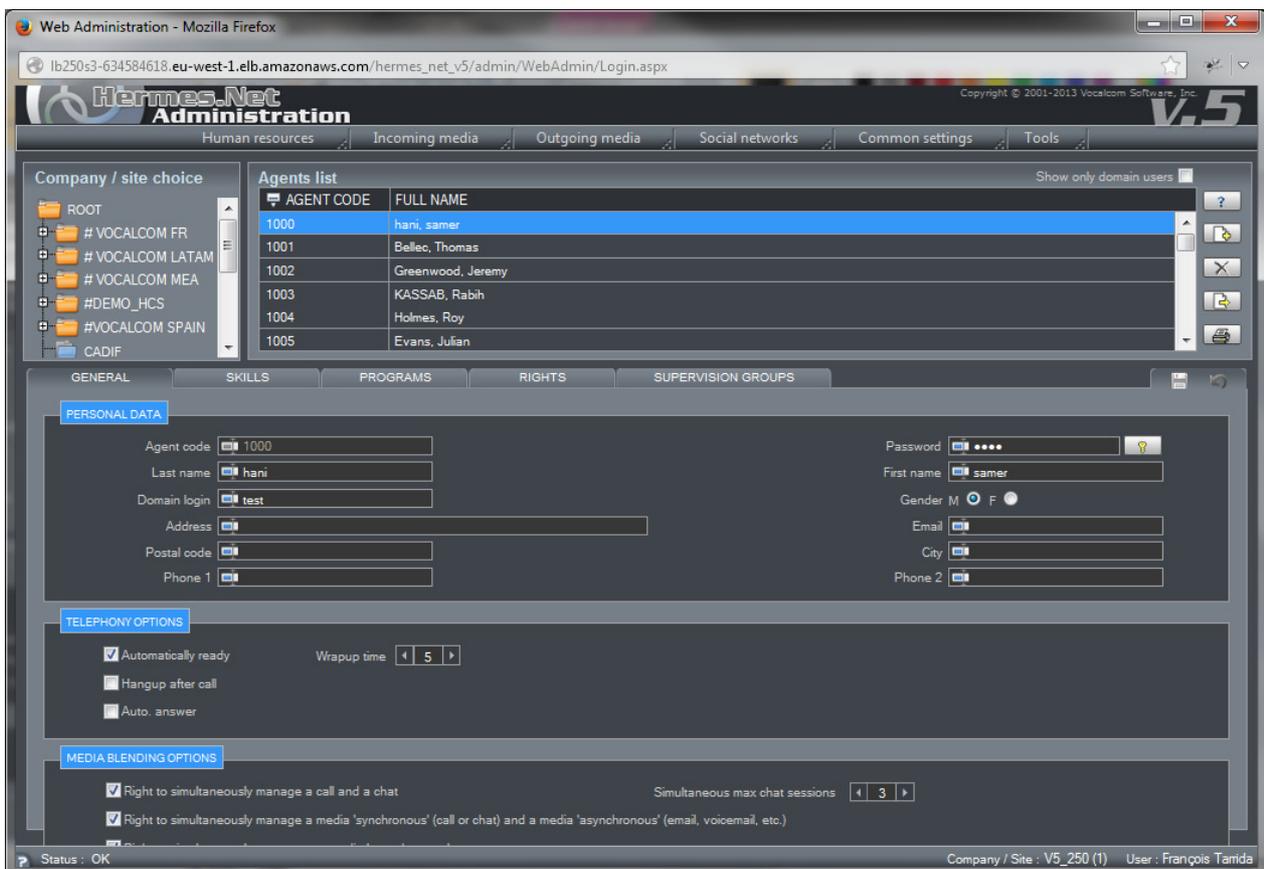
Obviously, if you don't have existing agent's accounts, you now have to create some in order to assign them to your campaign. Click on **"Human resources"**, then under **"Users"** select **"Agents"**.



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



Click on **"Add new"**  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.

9- Creating or assigning supervisors accounts

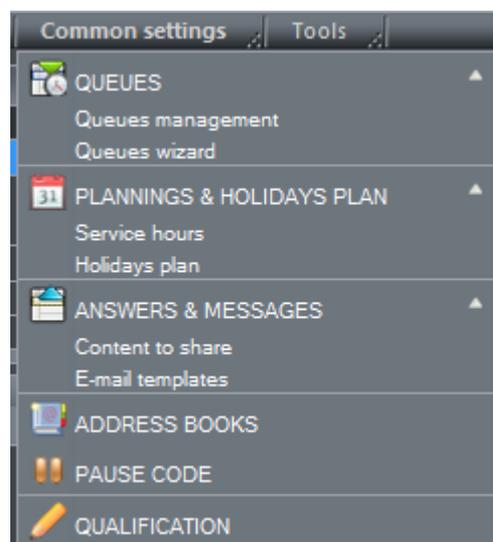
In order to create a supervisor, you just need to, when creating an agent account, give him supervision and reporting (optional) rights. This account will be automatically bumped to supervisor level, and the user will have access to the Supervision and Reporting modules.

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.

10-Creating or assigning Service Hours

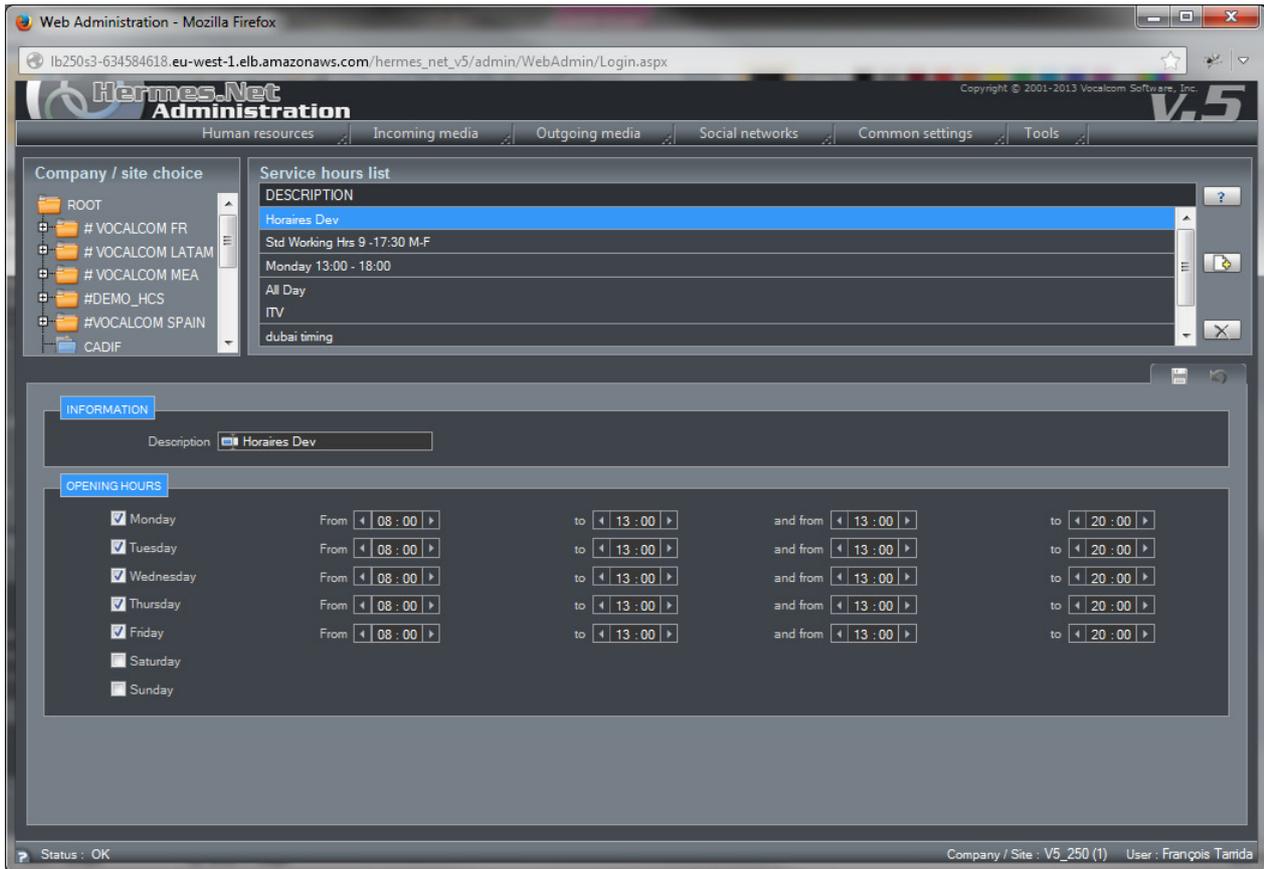
Your campaign will need Service Hours.

Click on "**common settings**", then under "**Plannings & holidays plan**" select "**Service hours**".



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

In your planning, choose the days and hours of activity. If you don't have breaks in the activity during the day, just fill the first two hours of activity on the left, and put 00:00 in the next two, as in the example below:



Web Administration - Mozilla Firefox
 lb250s3-634584618.eu-west-1.elb.amazonaws.com/hermes_net_v5/admin/WebAdmin/Login.aspx

Hermes.Net Administration V.5
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Human resources Incoming media Outgoing media Social networks Common settings Tools

Company / site choice
 ROOT
 # VOCALCOM FR
 # VOCALCOM LATAM
 # VOCALCOM MEA
 # DEMO_HCS
 # VOCALCOM SPAIN
 CADIF

Service hours list
 DESCRIPTION
 Horaires Dev
 Std Working Hrs 9 -17:30 M-F
 Monday 13:00 - 18:00
 All Day
 ITV
 dubai timing

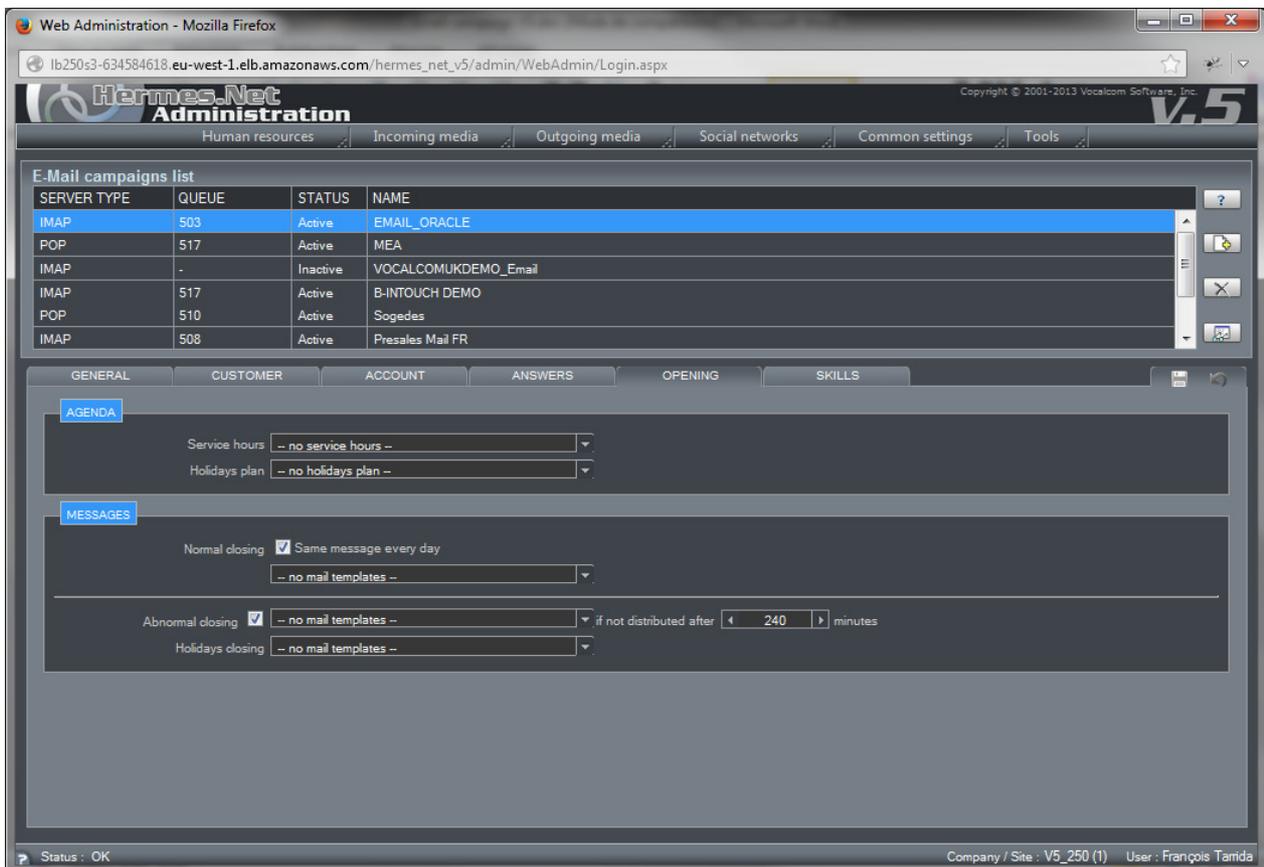
INFORMATION
 Description: Horaires Dev

OPENING HOURS

<input checked="" type="checkbox"/> Monday	From	08 : 00	to	13 : 00	and from	13 : 00	to	20 : 00
<input checked="" type="checkbox"/> Tuesday	From	08 : 00	to	13 : 00	and from	13 : 00	to	20 : 00
<input checked="" type="checkbox"/> Wednesday	From	08 : 00	to	13 : 00	and from	13 : 00	to	20 : 00
<input checked="" type="checkbox"/> Thursday	From	08 : 00	to	13 : 00	and from	13 : 00	to	20 : 00
<input checked="" type="checkbox"/> Friday	From	08 : 00	to	13 : 00	and from	13 : 00	to	20 : 00
<input type="checkbox"/> Saturday								
<input type="checkbox"/> Sunday								

Status : OK
 Company / Site : V5_250 (1) User : François Tamida

Save your planning, and go back to your campaign. Under the **"Opening"** tab, select your planning **"service hours"** and save. Now, anytime you're out of the chosen service hours, the campaign won't be automatically active.



Web Administration - Mozilla Firefox
 lb250s3-634584618.eu-west-1.elb.amazonaws.com/hermes_net_v5/admin/WebAdmin/Login.aspx

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Human resources Incoming media Outgoing media Social networks Common settings Tools

E-Mail campaigns list

SERVER TYPE	QUEUE	STATUS	NAME
IMAP	503	Active	EMAIL_ORACLE
POP	517	Active	MEA
IMAP	-	Inactive	VOCALCOMUKDEMO_Email
IMAP	517	Active	B-INTOUCH DEMO
POP	510	Active	Sogedes
IMAP	508	Active	Presales Mail FR

GENERAL CUSTOMER ACCOUNT ANSWERS OPENING SKILLS

AGENDA
 Service hours: -- no service hours --
 Holidays plan: -- no holidays plan --

MESSAGES
 Normal closing: Same message every day
 -- no mail templates --
 Abnormal closing: -- no mail templates -- if not distributed after 240 minutes
 Holidays closing: -- no mail templates --

Status : OK
 Company / Site : V5_250 (1) User : François Tamida

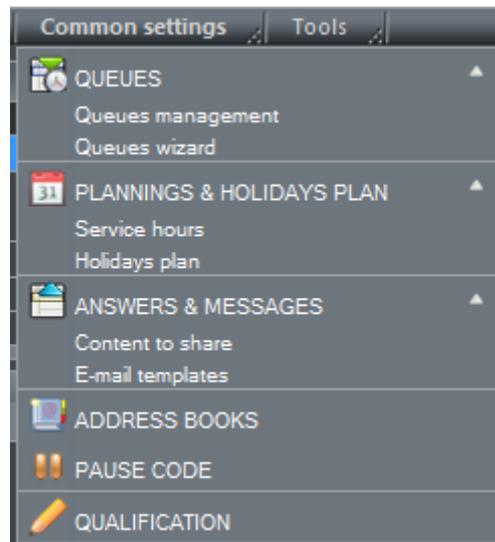


NOTE: Service hours are optional, and without it, your campaign will work nonetheless.

11- Creating or assigning a Holidays plan

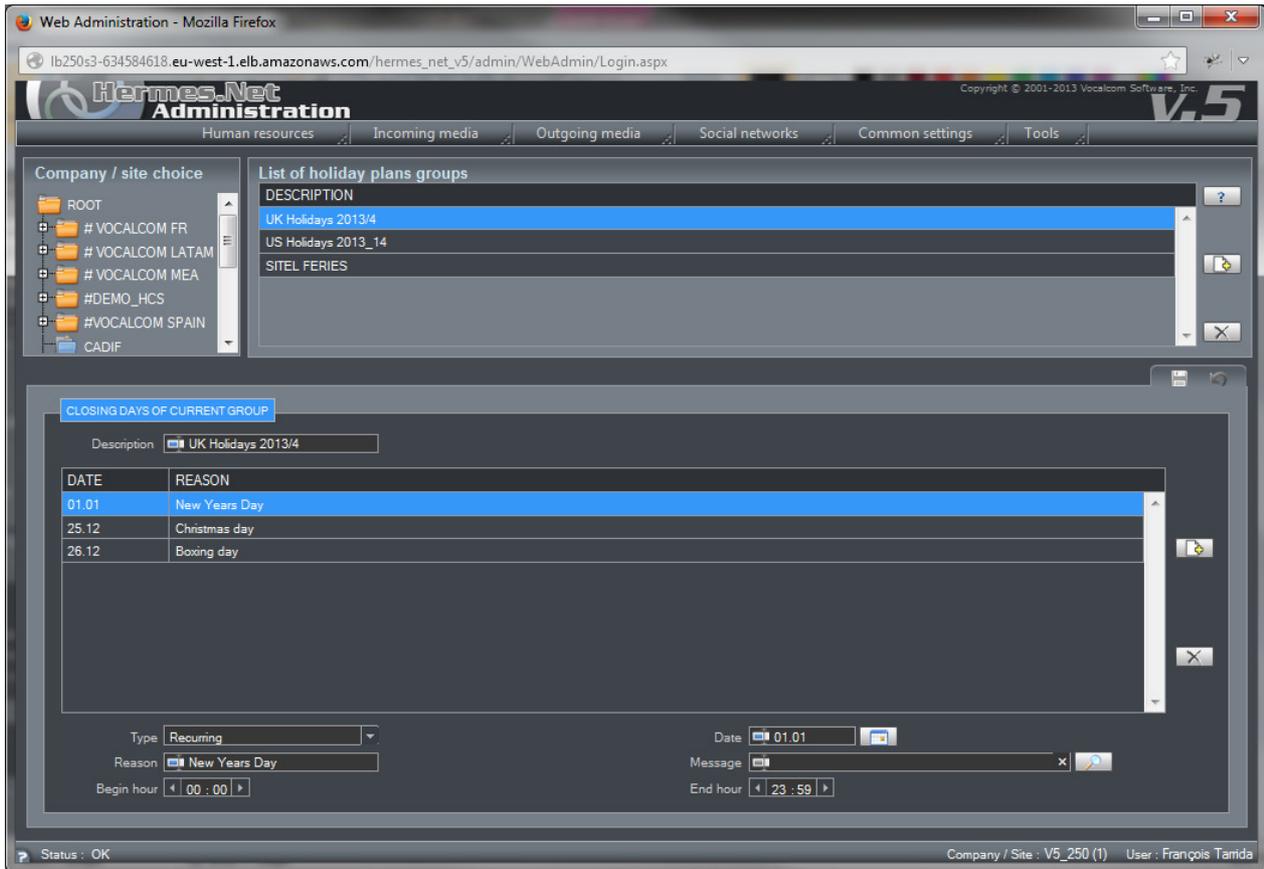
Your campaign will need a Holidays plan.

Click on **"Common settings"**, then under **"Plannings & holidays plan"** select **"Holidays plan"**.



Click on **"Add"**  to create a new holiday plans group.

Create different holidays in your group using the  button. A holiday can happen **once** or be **recurring** on each yearly calendar. You can create half-days of holidays, and choose a different voice message for each holiday (only useful in inbound call campaigns obviously).



The screenshot shows the 'Hermes.Net Administration V.5' interface. On the left, there is a 'Company / site choice' tree with folders for # VOCALCOM FR, # VOCALCOM LATAM, # VOCALCOM MEA, # DEMO_HCS, # VOCALCOM SPAIN, and CADIF. The main area is titled 'List of holiday plans groups' and contains a table with the following data:

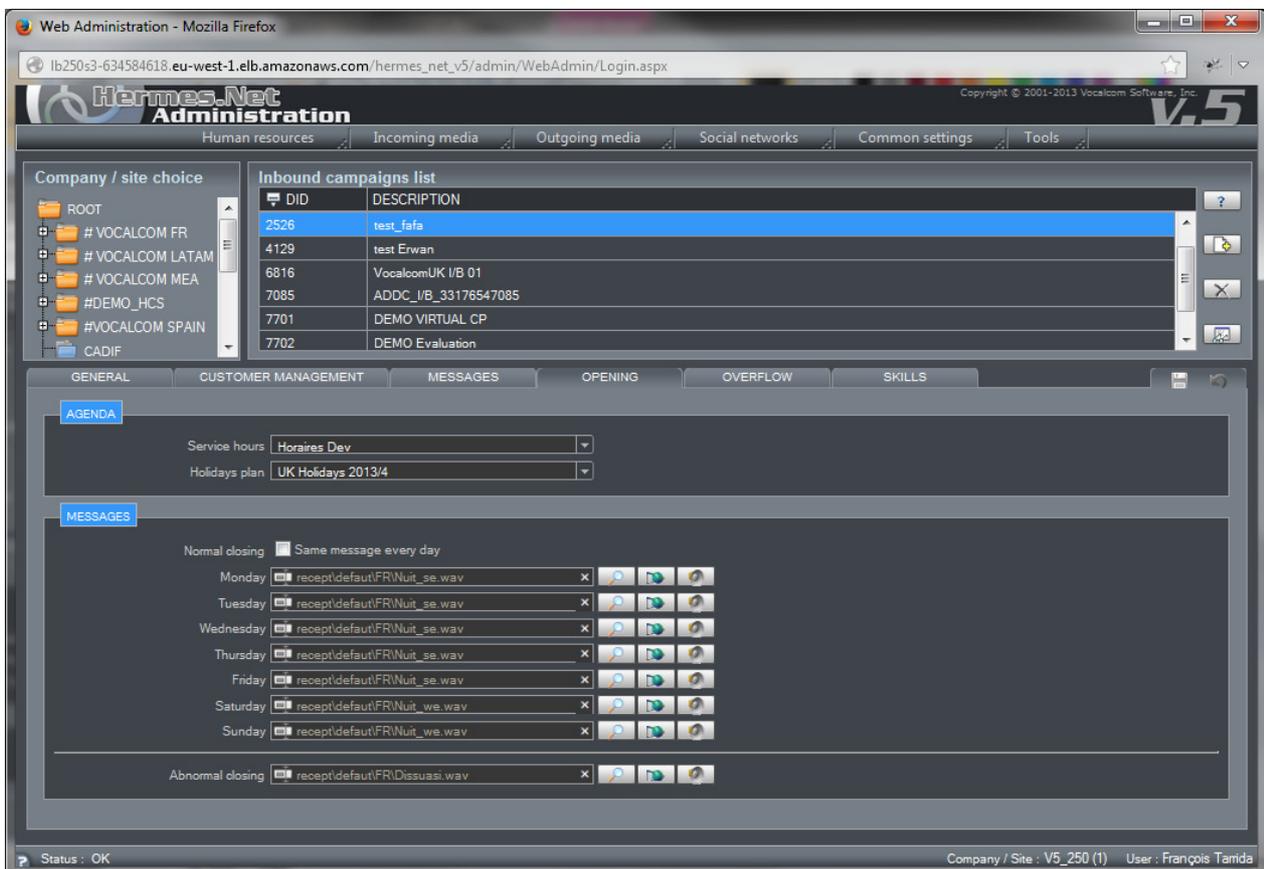
DESCRIPTION
UK Holidays 2013/4
US Holidays 2013_14
SITEL FERIES

Below this, the 'CLOSING DAYS OF CURRENT GROUP' section is active for 'UK Holidays 2013/4'. It shows a table of closing days:

DATE	REASON
01.01	New Years Day
25.12	Christmas day
26.12	Boxing day

At the bottom, there are input fields for 'Type' (set to 'Recurring'), 'Reason' (set to 'New Years Day'), 'Date' (set to '01.01'), 'Begin hour' (set to '00:00'), and 'End hour' (set to '23:59'). The status bar at the bottom indicates 'Status: OK' and 'Company / Site: V5_250 (1) User: François Tarida'.

Save your current group, and go back to your campaign. Under the **"Opening"** tab, select your holidays plan and save. Now, anytime you're in any of the chosen holidays, the campaign won't be active.



The screenshot shows the 'Hermes.Net Administration V.5' interface with the 'Opening' tab selected. The 'Inbound campaigns list' is visible at the top, showing a table with columns 'DID' and 'DESCRIPTION':

DID	DESCRIPTION
2526	test_fafa
4129	test Erwan
6816	VocalcomUK I/B 01
7085	ADDC_I/B_33176547085
7701	DEMO VIRTUAL CP
7702	DEMO Evaluation

Below the campaigns list, the 'AGENDA' section is active. It shows 'Service hours' set to 'Horaires Dev' and 'Holidays plan' set to 'UK Holidays 2013/4'. The 'MESSAGES' section below it shows a list of messages for each day of the week:

- Monday: Same message every day. Message: receipt/defaultFR/Nuit_se.wav
- Tuesday: Same message every day. Message: receipt/defaultFR/Nuit_se.wav
- Wednesday: Same message every day. Message: receipt/defaultFR/Nuit_se.wav
- Thursday: Same message every day. Message: receipt/defaultFR/Nuit_se.wav
- Friday: Same message every day. Message: receipt/defaultFR/Nuit_se.wav
- Saturday: Same message every day. Message: receipt/defaultFR/Nuit_we.wav
- Sunday: Same message every day. Message: receipt/defaultFR/Nuit_we.wav

At the bottom, there is an 'Abnormal closing' section with a message: receipt/defaultFR/Dissuasi.wav. The status bar at the bottom indicates 'Status: OK' and 'Company / Site: V5_250 (1) User: François Tarida'.

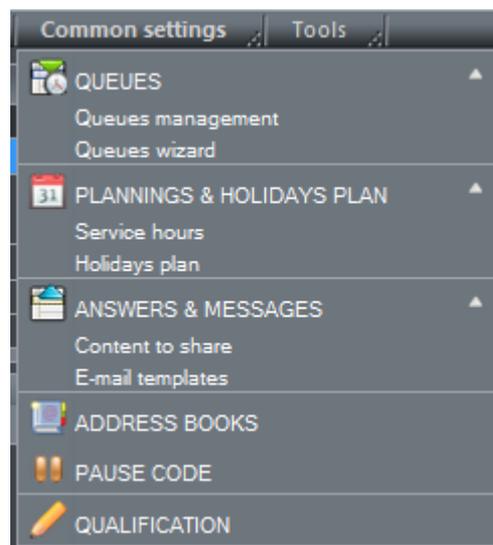


NOTE: Holidays plan is optional, and without it, your campaign will work nonetheless.

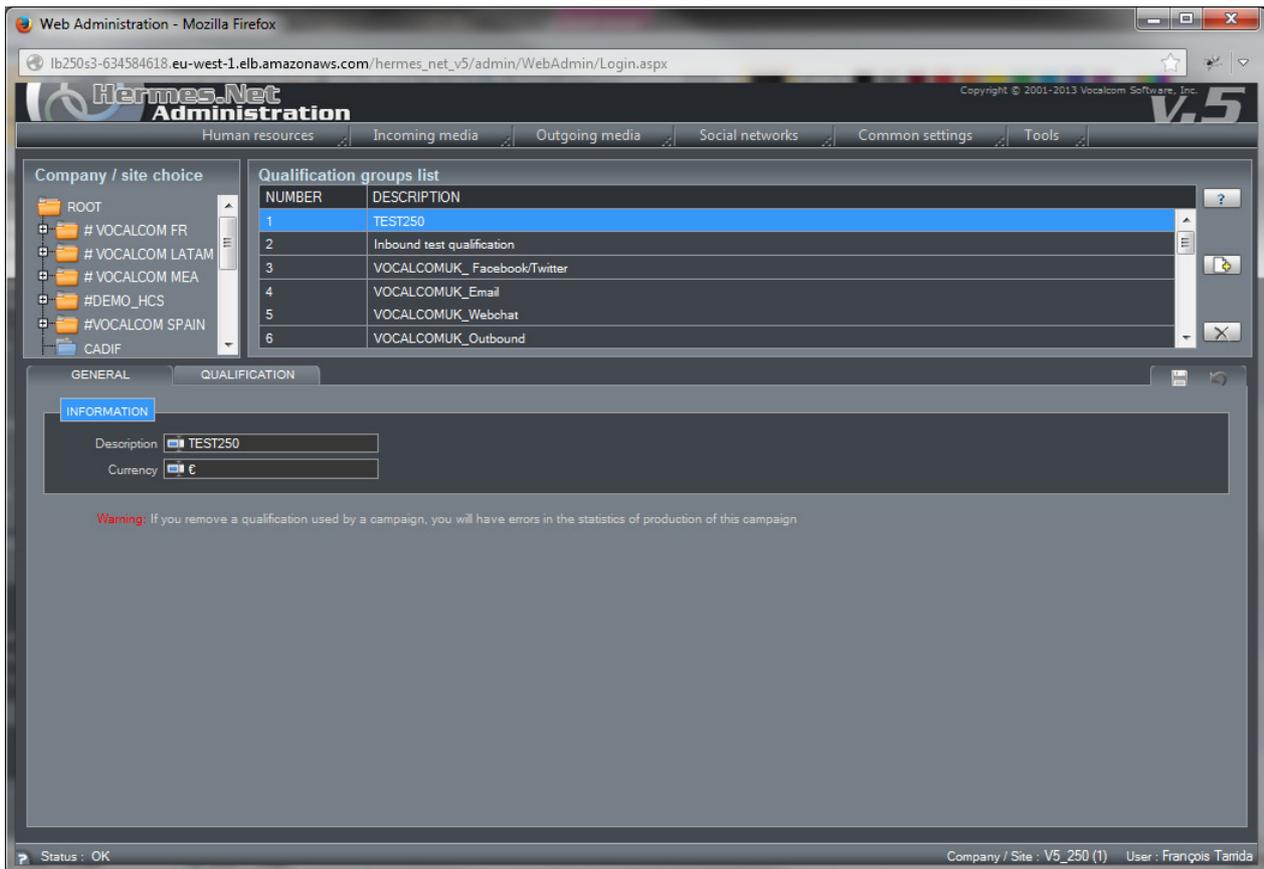
12- Creating or assigning call qualifications

For your agents to qualify their calls, you will need to create a group of **email qualifications** (also called **email statuses**). It is very **important** to have a clear idea of what 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.

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

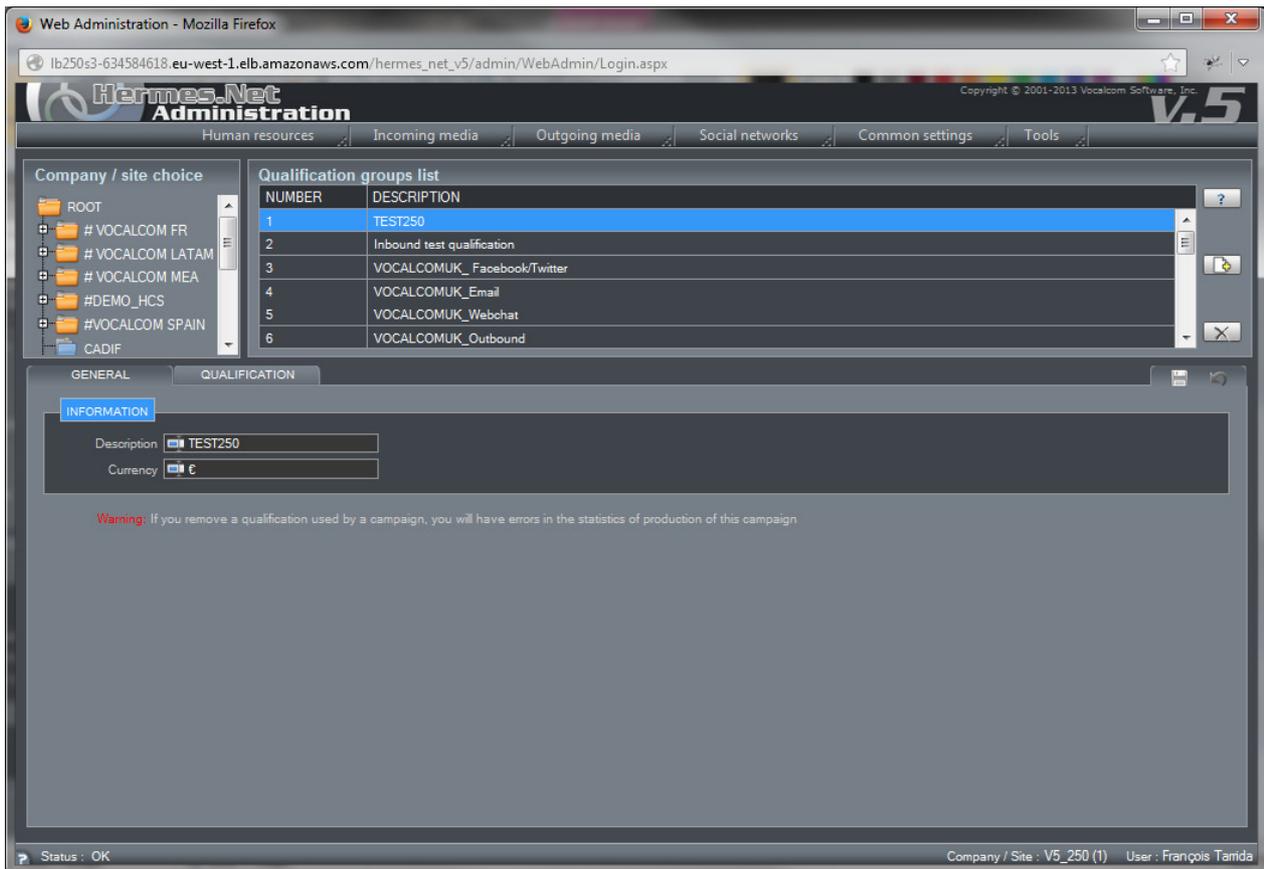


Click on "**Add**"  to create a new qualification group.



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 qualifications.

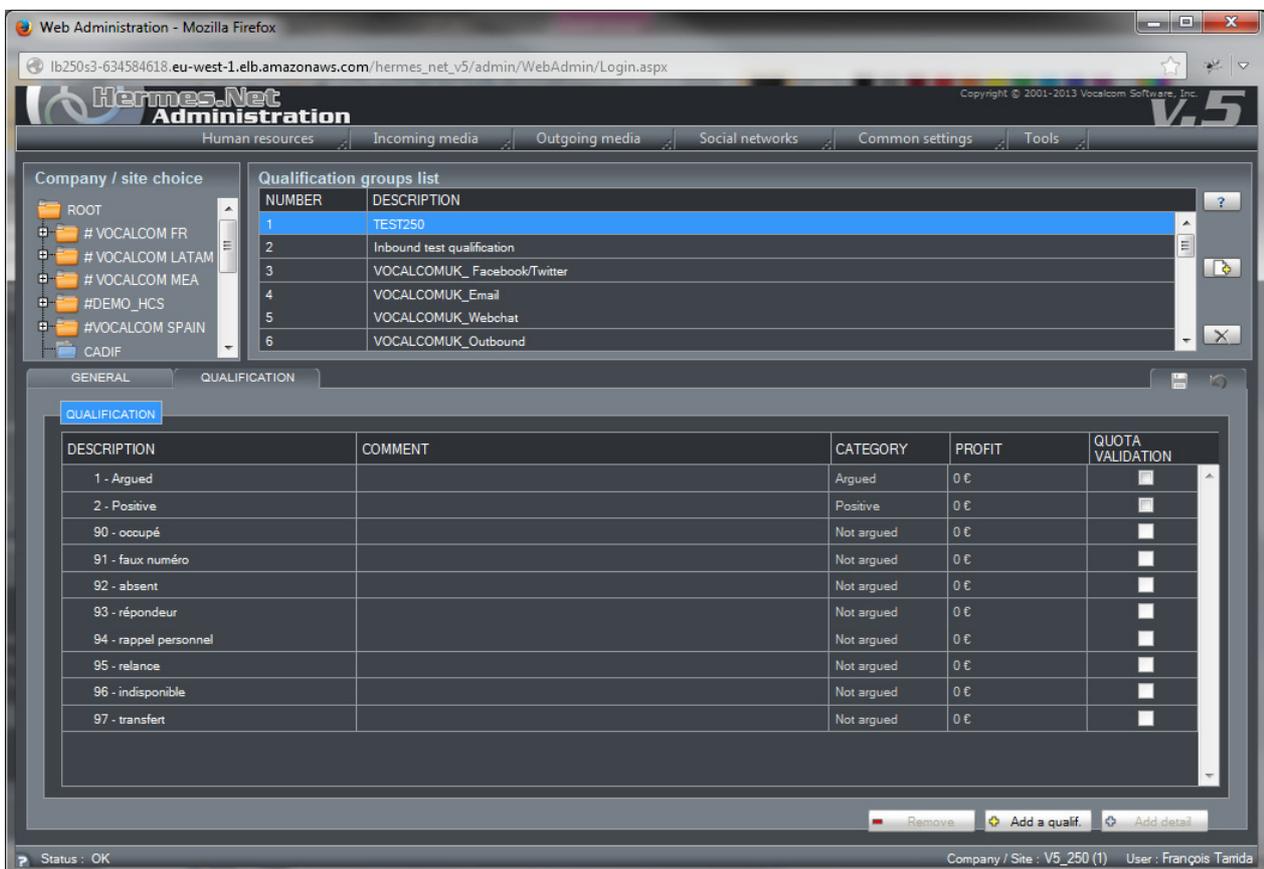


The screenshot shows the 'Hermes.Net Administration' interface. On the left, there is a 'Company / site choice' tree with folders for # VOCALCOM FR, # VOCALCOM LATAM, # VOCALCOM MEA, # DEMO_HCS, # VOCALCOM SPAIN, and CADIF. The main area displays the 'Qualification groups list' with the following data:

NUMBER	DESCRIPTION
1	TEST250
2	Inbound test qualification
3	VOCALCOMUK_Facebook/Twitter
4	VOCALCOMUK_Email
5	VOCALCOMUK_Webchat
6	VOCALCOMUK_Outbound

Below the list, the 'GENERAL' tab is active, showing an 'INFORMATION' section with a 'Description' field containing 'TEST250' and a 'Currency' dropdown set to '€'. A warning message states: 'Warning: If you remove a qualification used by a campaign, you will have errors in the statistics of production of this campaign'.

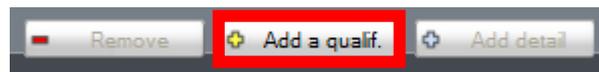
Qualifications: Create a new status by clicking **"Add a qualif."**. If you wish to delete it, click **"Remove"**. You can also add sub-status or details by clicking **"Add detail"**. A sub-status is useful if you wish to give more precision to the general status, for example what was sold under the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



This screenshot shows the 'Qualification' details for the selected 'TEST250' group. The 'QUALIFICATION' tab is active, displaying a table with the following data:

DESCRIPTION	COMMENT	CATEGORY	PROFIT	QUOTA VALIDATION
1 - Argued		Argued	0 €	<input type="checkbox"/>
2 - Positive		Positive	0 €	<input type="checkbox"/>
90 - occupé		Not argued	0 €	<input type="checkbox"/>
91 - faux numéro		Not argued	0 €	<input type="checkbox"/>
92 - absent		Not argued	0 €	<input type="checkbox"/>
93 - répondeur		Not argued	0 €	<input type="checkbox"/>
94 - rappel personnel		Not argued	0 €	<input type="checkbox"/>
95 - relance		Not argued	0 €	<input type="checkbox"/>
96 - indisponible		Not argued	0 €	<input type="checkbox"/>
97 - transfert		Not argued	0 €	<input type="checkbox"/>

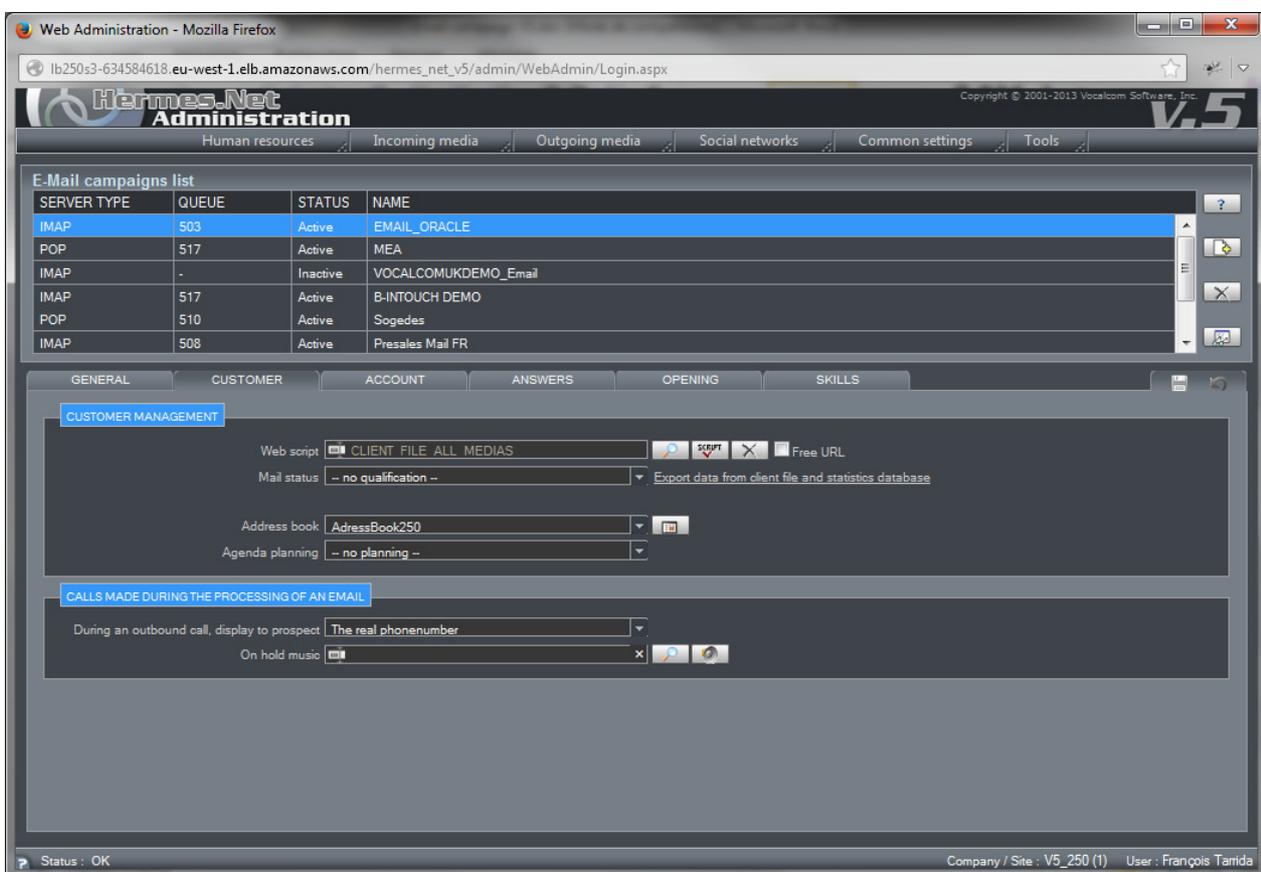
At the bottom of the interface, there are three buttons: 'Remove', 'Add a qualif.', and 'Add detail'.



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 (only used in outbound calls context).

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. Obviously, in email campaigns, most won't have a use, if any at all.

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.



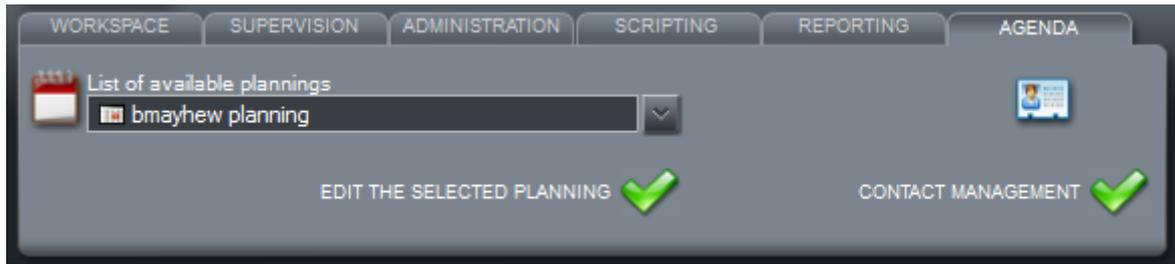
Note: You can now also set up an auto recording on all statuses or some selected statuses (for example, you need to keep track of all SALE agreements for legal reasons, etc...).

13- Creating your Address book

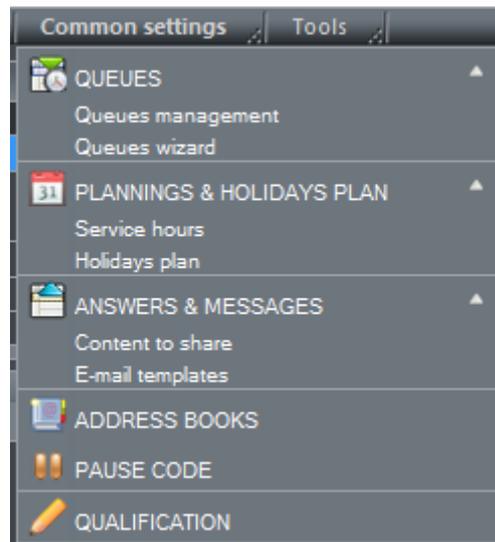
If you wish to take an appointment with the Hermes agenda module, you will need to set up an address book that contains the customer data, and a salesmen planning and salesmen accounts.



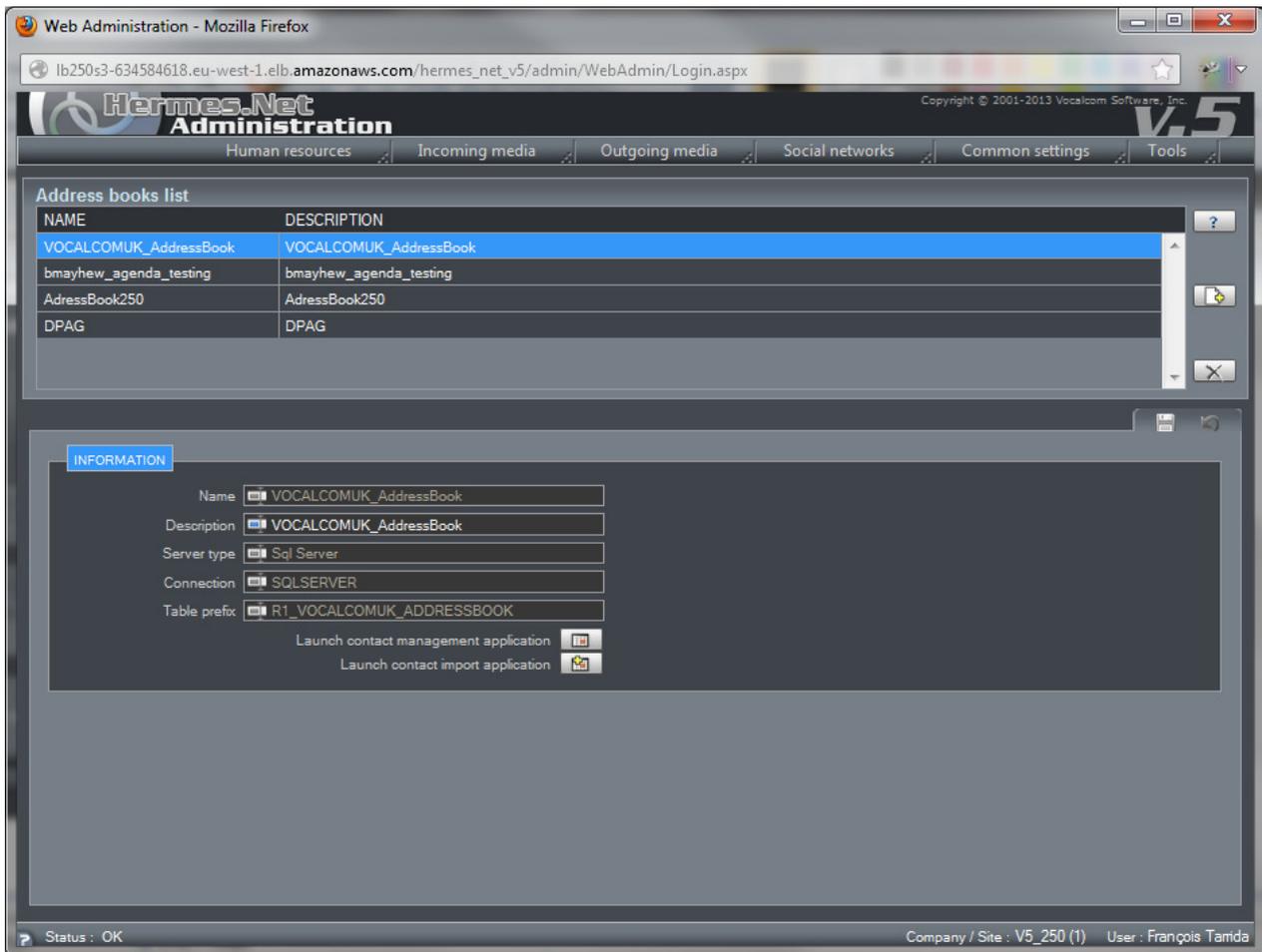
NOTE: In the V5, if you want you can, through a wizard on the home menu, create directly your plannings and CRMs.



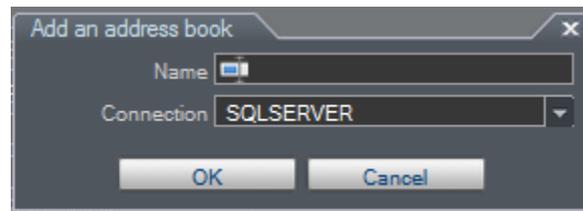
Click on **"Common settings"**, and then select **"Address books"**.



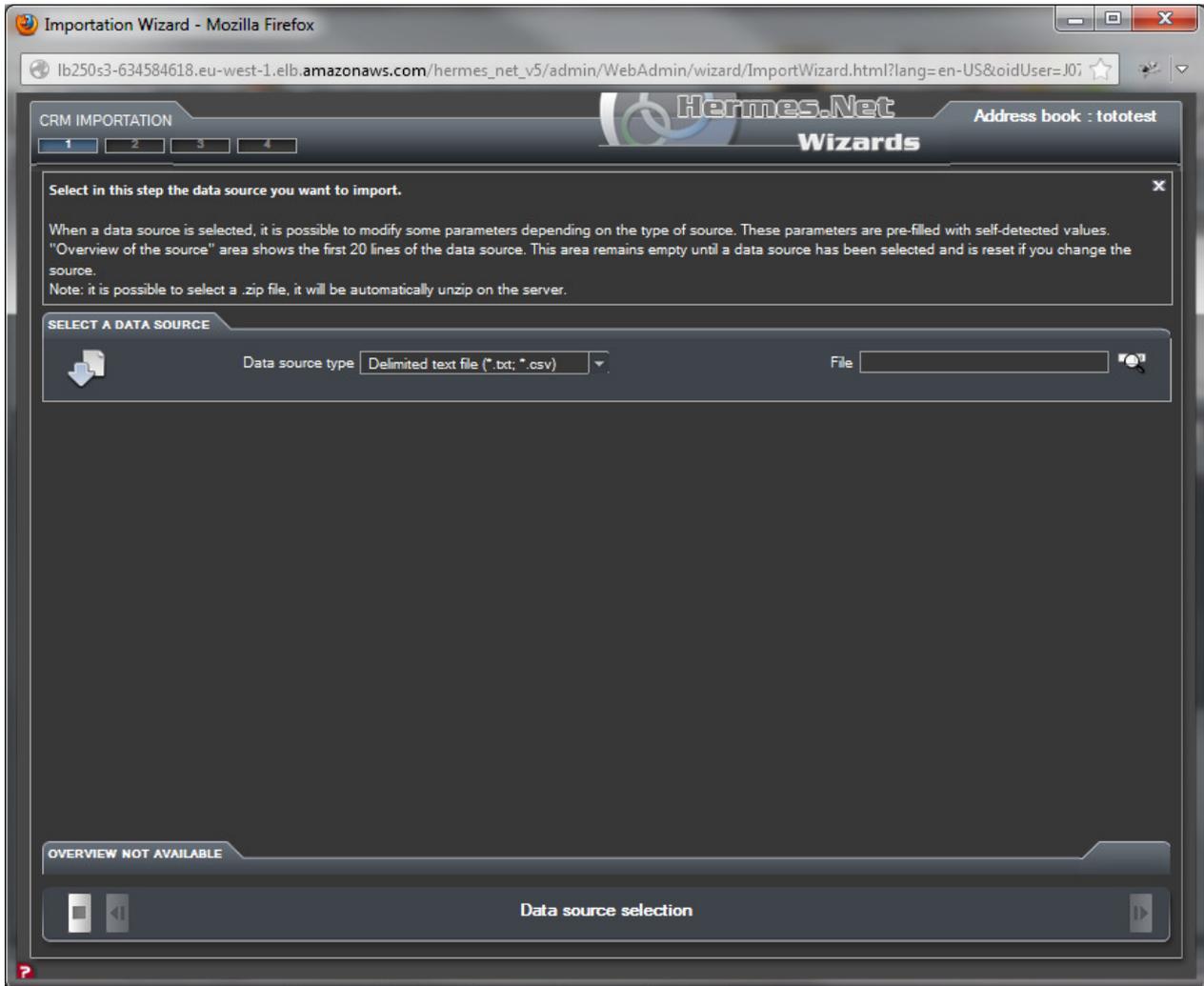
Click on **"Add"**  to create a new address book.



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



Click on **“Launch contact import management”**. 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=J0i

CRM IMPORTATION Address book : tototest

1 2 3 4

Hermes.Net Wizards

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	NY	
Toto	12535656	NY	
Toto	12535656	PHI	
Toto	12535656	NY	
Toto	12535656	NY	
Toto	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=J0i

CRM IMPORTATION Address book : tototest

1 2 **3** 4 5 6 7 8

Hermes.Net Wizards

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	- not available -	<input type="checkbox"/>
Last name	- not available -	<input checked="" type="checkbox"/>
First name	- not available -	<input type="checkbox"/>
Company	- not available -	<input type="checkbox"/>
Job title	- not available -	<input type="checkbox"/>
Client number	- not available -	<input type="checkbox"/>
Comment	- not available -	<input type="checkbox"/>

* Needed field

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

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=J0i

CRM IMPORTATION Address book : tototest

Hermes.Net Wizards

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 -		<input checked="" type="checkbox"/>
Personal phone number	- not available -	Phone number (national)		<input type="checkbox"/>
Mobile phone number	- not available -	Phone number (national)		<input type="checkbox"/>
Other phone num	- not available -	Phone number (national)		<input type="checkbox"/>
Other phone num	- not available -	Phone number (national)		<input type="checkbox"/>
Other phone num	- not available -	Phone number (national)		<input type="checkbox"/>
Other phone num	- not available -	Phone number (national)		<input type="checkbox"/>
Other phone num	- not available -	Phone number (national)		<input type="checkbox"/>

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

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=J0i

CRM IMPORTATION Address book : tototest

1 2 3 4 **5** 6 7 8

Hermes.Net Wizards

Find here information about the professional address of the customers.
All this informations are optional.

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=J0i

CRM IMPORTATION Address book : tototest

1 2 3 4 5 **6** 7 8

Hermes.Net Wizards

Find here information about the personal address of the customers.
All this informations are optional.

CUSTOMERS PERSONAL 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=J0i

CRM IMPORTATION Address book : tototest

1 2 3 4 5 6 **7** 8

Hermes.Net Wizards

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=J0i

CRM IMPORTATION Address book : tototest

Hermes.Net Wizards

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

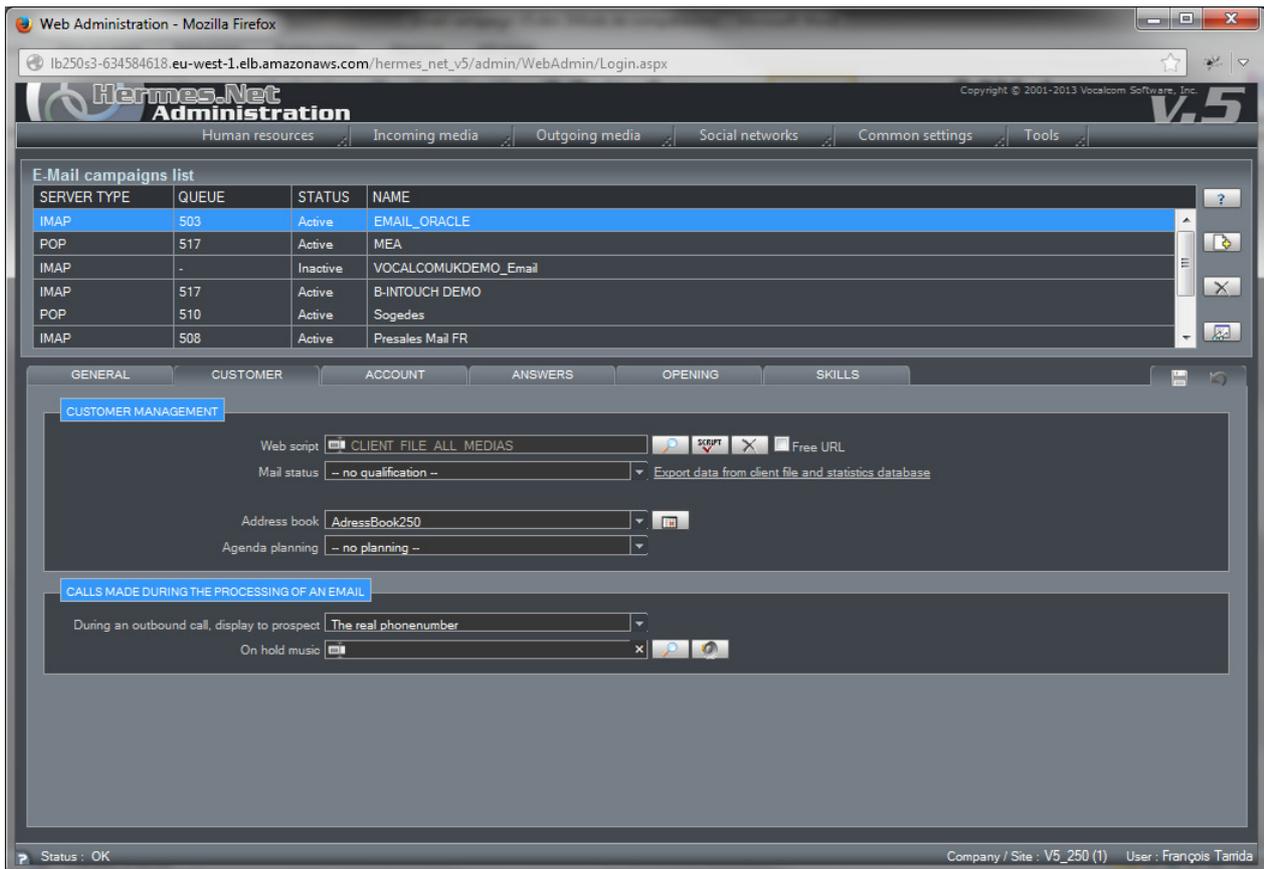
Destination : Source
 Last name : NAME
 Professional phone number : TELEPHONE

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 **"address book"** and save.



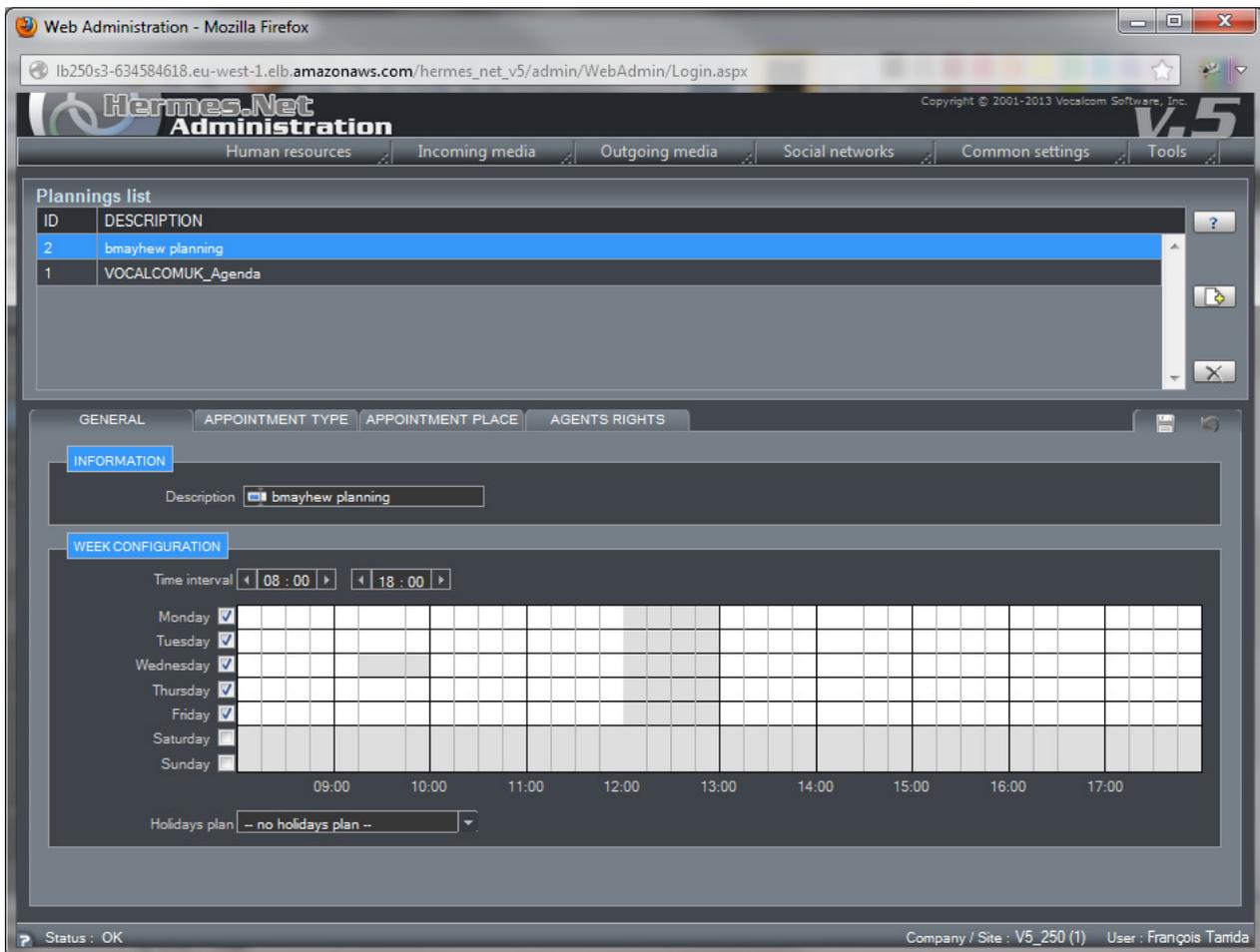
14- Creating the Salesmen planning

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 length, 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.

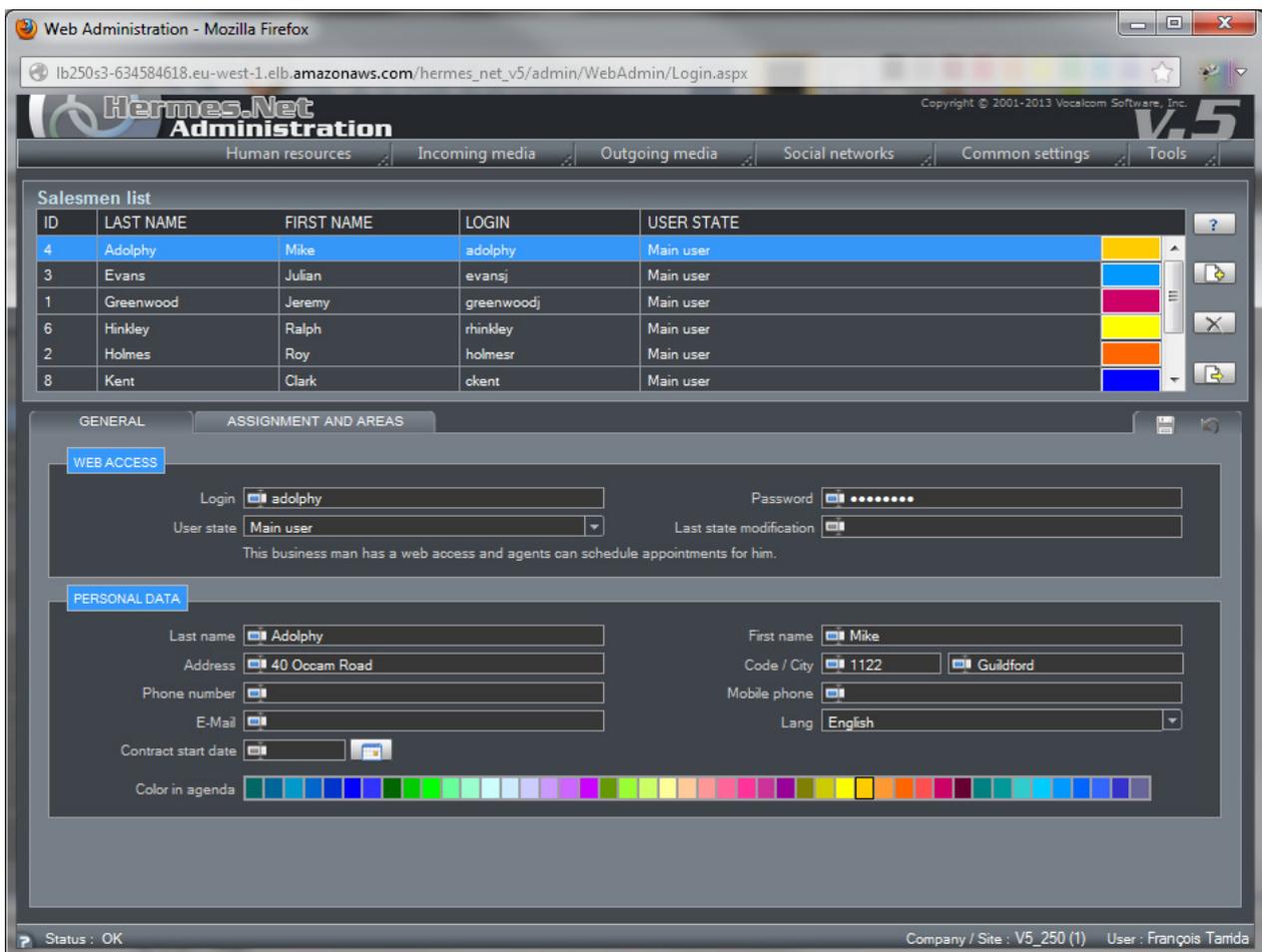
15- Creating the salesmen

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.

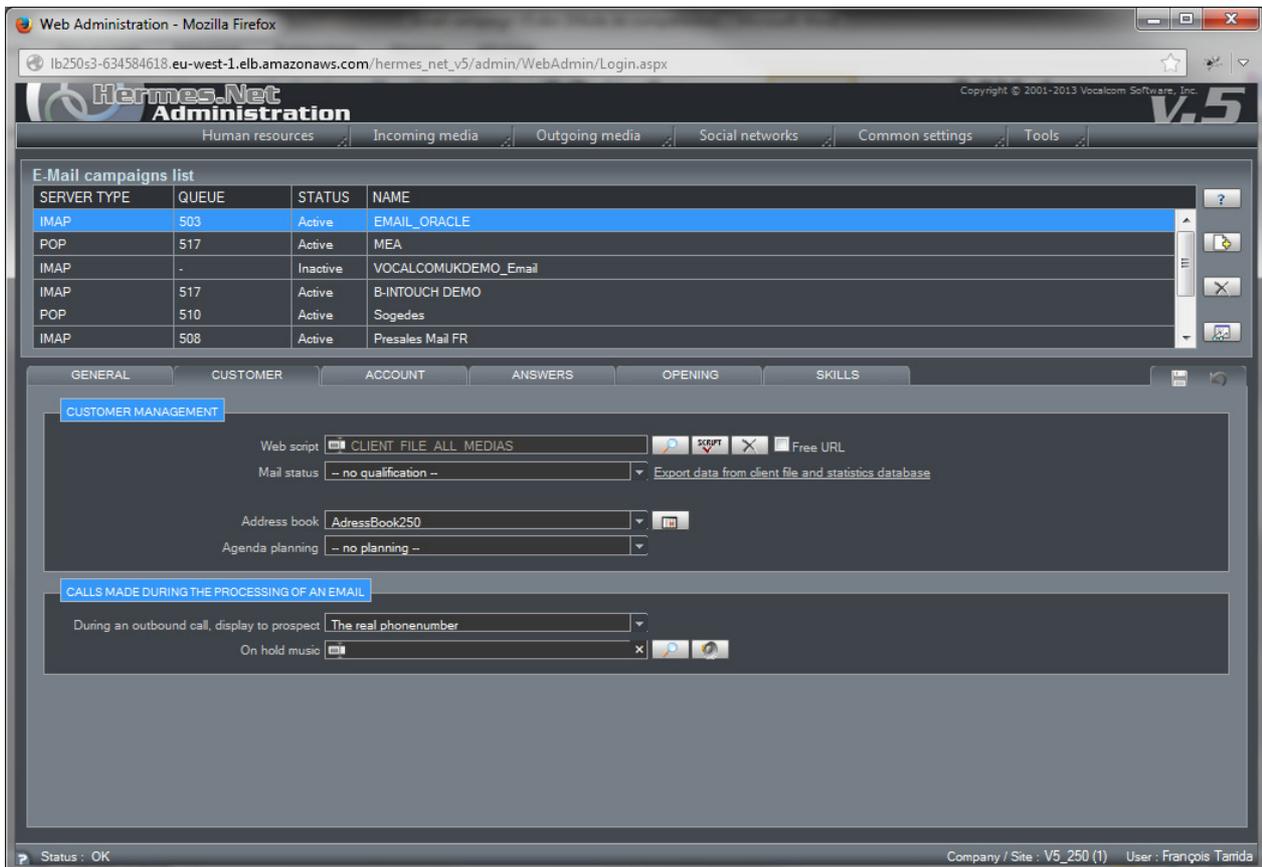


You can configure the different tabs :

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.

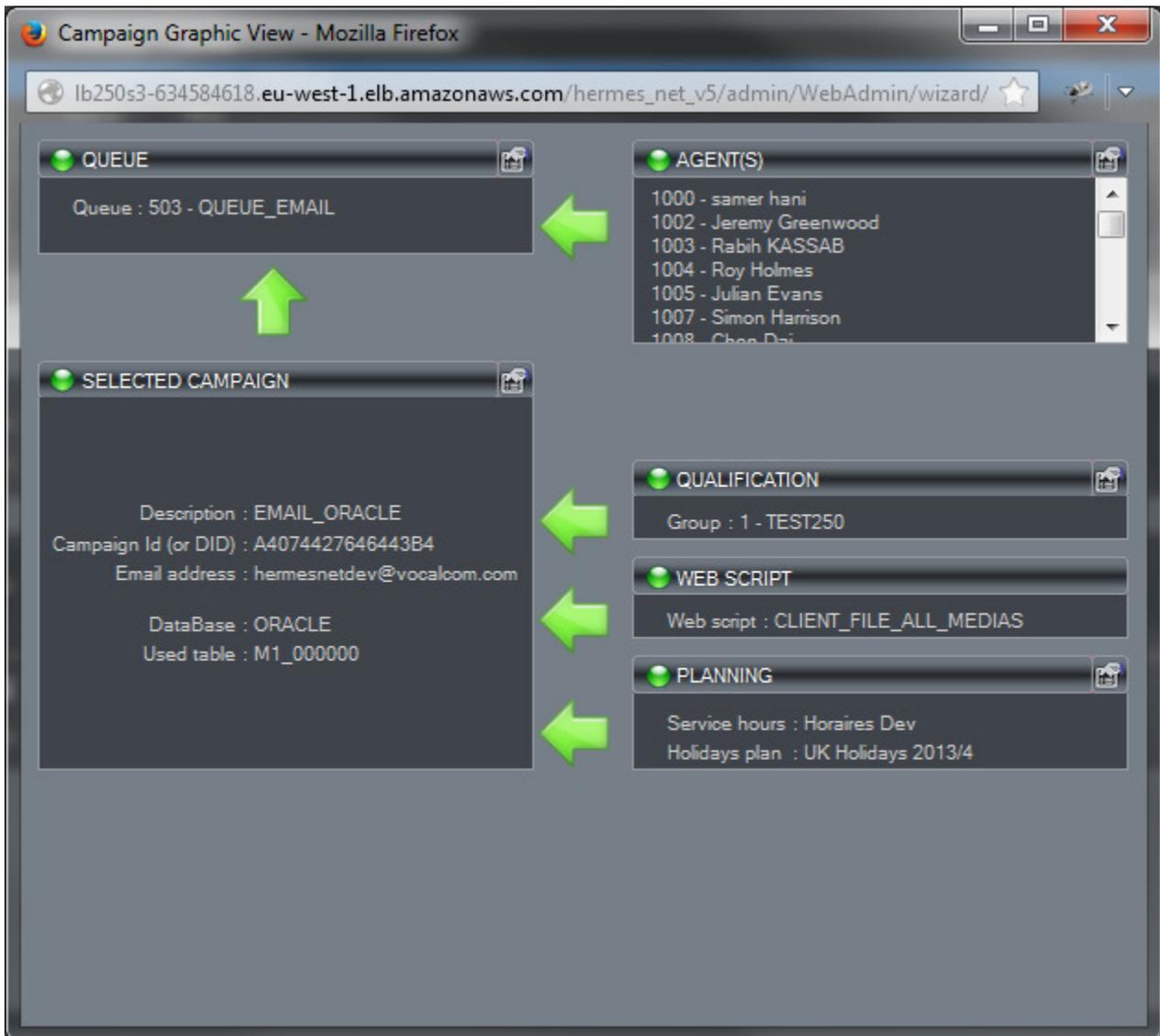
Assignment and areas : select your planning, then fill in geographical zones (optional) and quotas on his appointments (optional).

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



16- 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:



The screenshot shows a web browser window titled "Campaign Graphic View - Mozilla Firefox" with the URL `lb250s3-634584618.eu-west-1.elb.amazonaws.com/hermes_net_v5/admin/WebAdmin/wizard/`. The interface contains several panels:

- QUEUE**: Queue : 503 - QUEUE_EMAIL
- AGENT(S)**:
 - 1000 - samer hari
 - 1002 - Jeremy Greenwood
 - 1003 - Rabih KASSAB
 - 1004 - Roy Holmes
 - 1005 - Julian Evans
 - 1007 - Simon Harrison
 - 1008 - Chen Dai
- SELECTED CAMPAIGN**:
 - Description : EMAIL_ORACLE
 - Campaign Id (or DID) : A4074427646443B4
 - Email address : hermesnetdev@vocalcom.com
 - DataBase : ORACLE
 - Used table : M1_000000
- QUALIFICATION**: Group : 1 - TEST250
- WEB SCRIPT**: Web script : CLIENT_FILE_ALL_MEDIAS
- PLANNING**:
 - Service hours : Horaires Dev
 - Holidays plan : UK Holidays 2013/4

Green arrows indicate the following connections:

- An arrow points from the "AGENT(S)" list to the "QUEUE" panel.
- An arrow points from the "SELECTED CAMPAIGN" panel to the "QUEUE" panel.
- An arrow points from the "SELECTED CAMPAIGN" panel to the "QUALIFICATION" panel.
- An arrow points from the "SELECTED CAMPAIGN" panel to the "WEB SCRIPT" panel.
- An arrow points from the "SELECTED CAMPAIGN" panel to the "PLANNING" panel.