

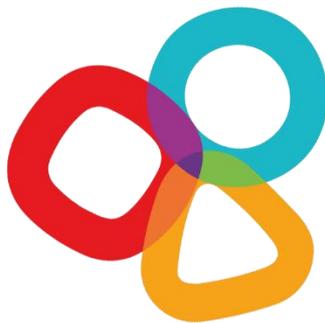
**HERMES.NET V5**  
Documentation

# Campaign Administration

## SOCIAL NETWORK - FACEBOOK

### User Manual

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<b>Product</b>	Hermes.Net	<b>Version Document</b>	1.0
<b>Category</b>	User Manuel	<b>Date Version</b>	September 2017
<b>Version</b>	5.5	<b>Approbation</b>	Product Manager

## CONCERNING THIS DOCUMENT

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

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## REVISIONS HISTORY

Document version	Date	Revision Description
0.1	06-13-2014	First Version by TW
0.2	01-25-2017	Template & content update by TW
0.3	07-20-2017	After-review update by TW
1.0	09-22-2017	Validated version

## REFERENCE DOCUMENT

Document version	Date	Revision Description
Hermes.Net V5		
Manager Dashboard		

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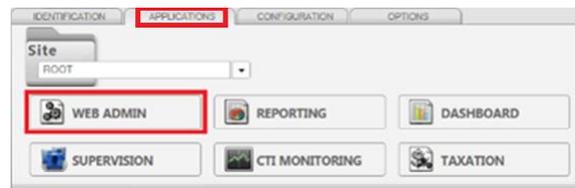
## 1 WHAT IS THIS DOCUMENT ?

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

## 2 STEP BY STEP

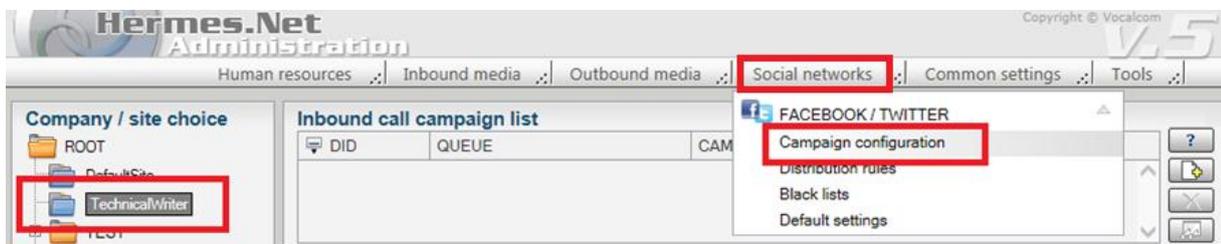
To set up your campaign, you must go through several important steps, described below. The order given here is generally considered the best, although it is possible to follow a different order. Once you get familiar with the Hermes system, you'll be able to follow the order you like best, but for starters, we recommend that you follow the order and instructions given here.

### 2.1 INITIALIZE THE CAMPAIGN IN HERMES

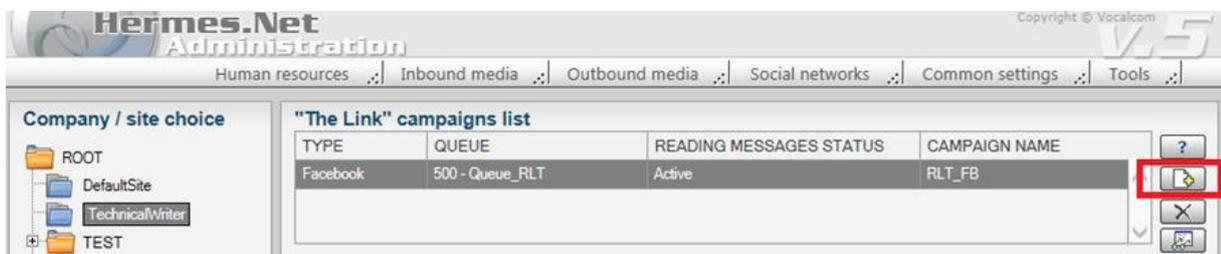


First of all, one must connect to ROOT.

On the site « **TechnicalWriter** », « **Social Networks** » menu, select « **Campaigns configuration** ».

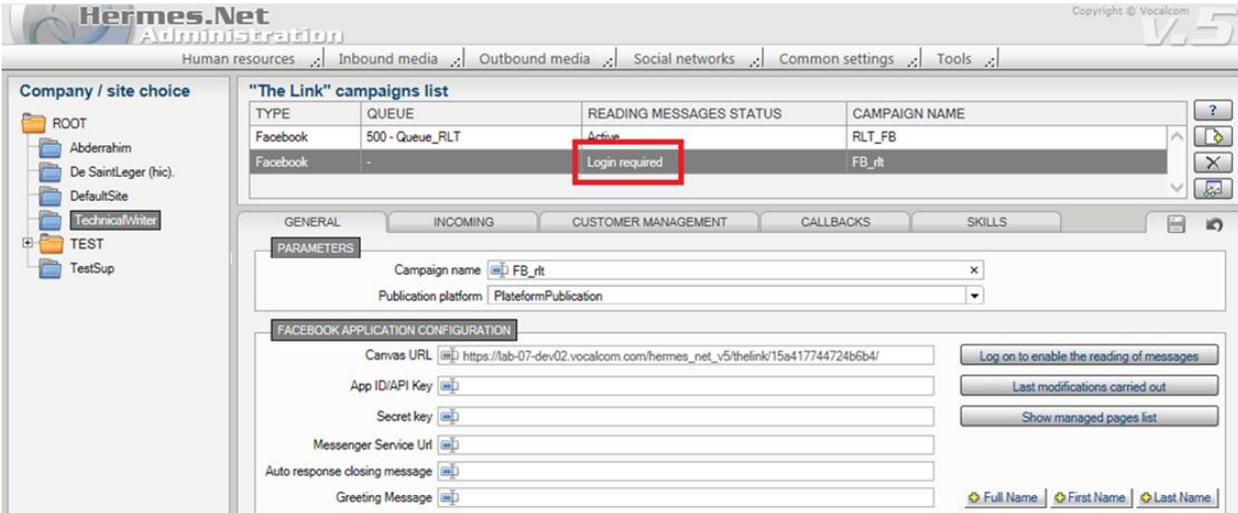


Click on « + » in the « **Campaigns list** ». It triggers the display of a popup.

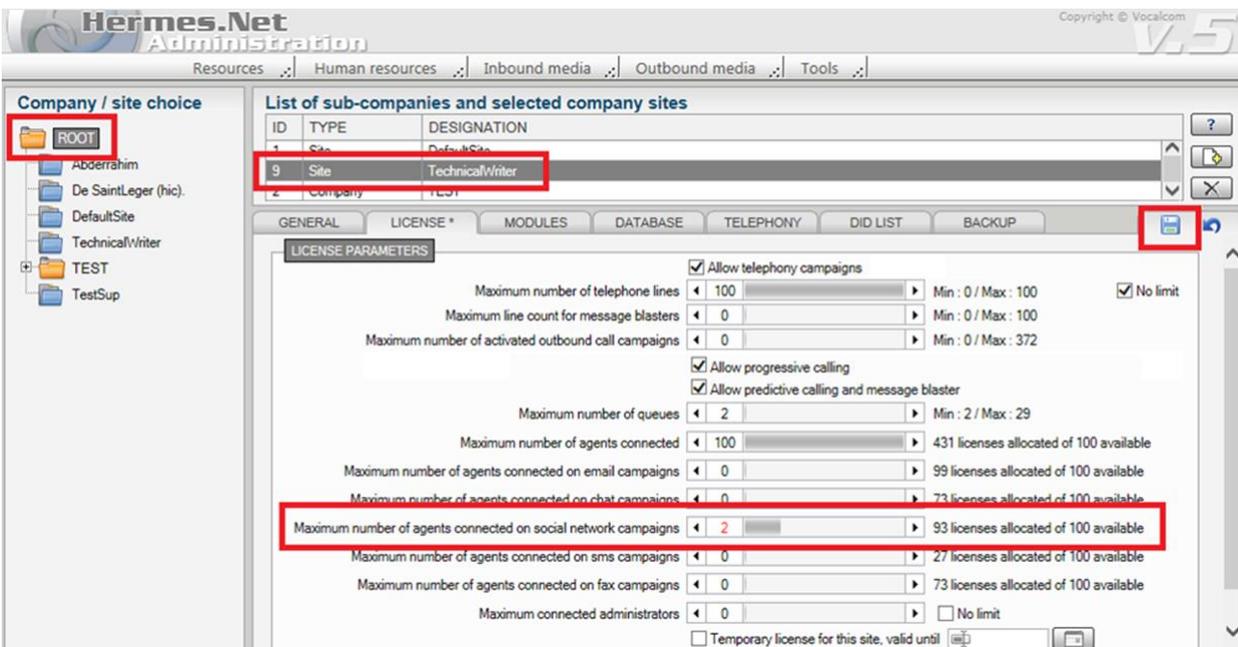


Enter the campaign's type (*here, Facebook*), name (*here, FB\_rt*) and database (*here, 10.0.2.183*), then click on « **Validate** ».

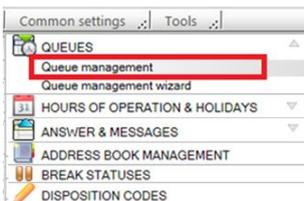
The campaign is created, the column « **Reading messages status** » indicates a login is required.



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

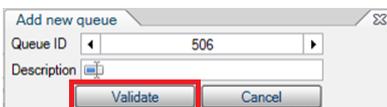


## 2.1 CREATE A QUEUE



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

Click on « **Add** »  to create a new queue. It displays a popup.

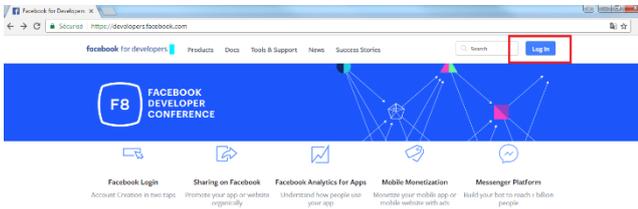


Give it a Queue ID and a description, and then click on « **Validate** ».

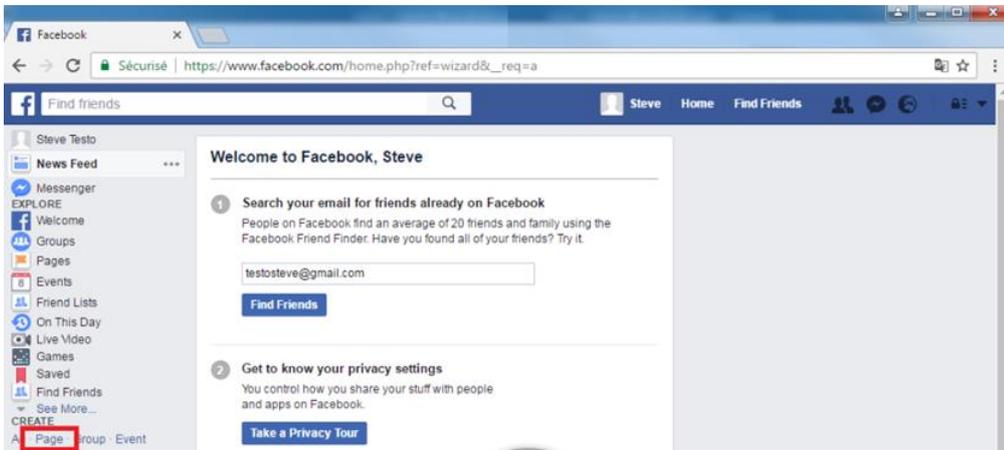


## 2.2 CREATE A PAGE IN FACEBOOK

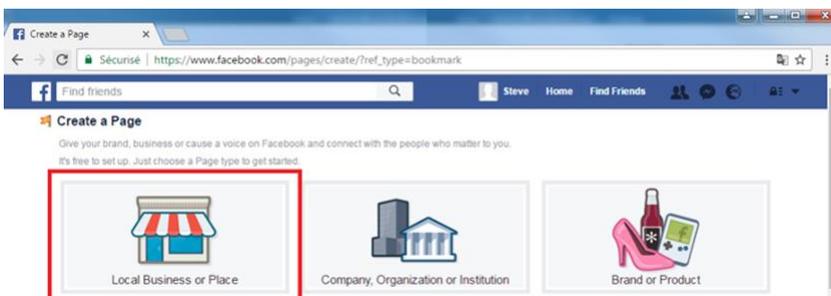
Create a specific Facebook account on <https://developers.facebook.com>.



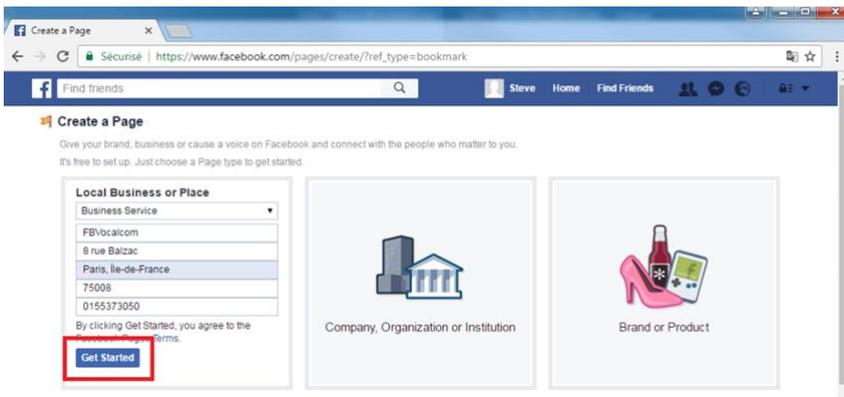
Once the Facebook account is created, on Facebook's home page, click on « **Create a page** ».



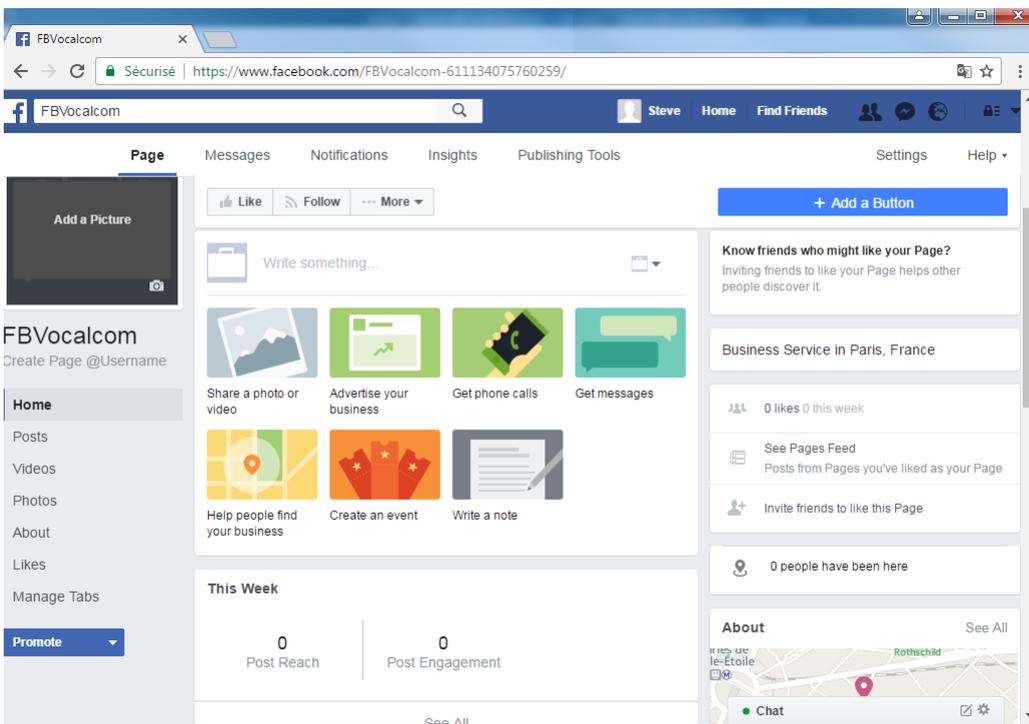
Choose the type of page you want by clicking in the appropriate box.



Type in all necessary details and click on « **Get started** ».

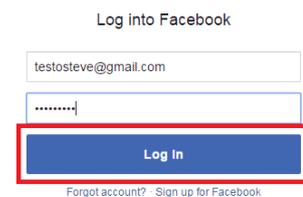
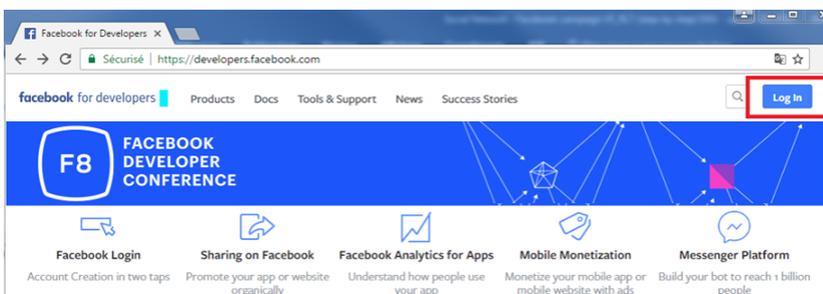


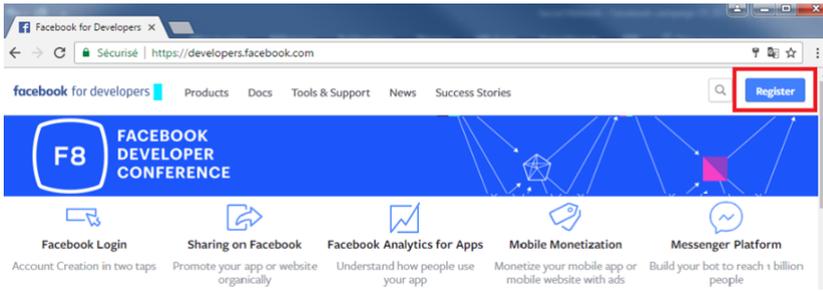
The Facebook page FB is now created :



### 2.3 CREATE AN APP IN FACEBOOK

First, log in on <https://developers.facebook.com>, and then register as a developer.





**Register as a Facebook Developer**

Name  
Steve Testo

Company

Job Title  
Engineer

Do you accept the Facebook Platform Policy and the Facebook Privacy Policy?  
 Yes

In the popup, enter your company name, select your job title from the drop-down list, set the button « **Facebook Platform & Privacy Policies ?** » to « **Yes** », then click on « **Next** ».

**Register as a Facebook Developer**

We need to verify your account to complete your registration. Your phone number will be added to your timeline but won't be visible to your friends.

Country  
France (+33)

Phone Number

Get Confirmation Code

Confirmation Code

You can also verify your account by adding a credit card. [?]

In the popup, enter your mobile phone number, and then click on « **Send as Text** ».

**Please Re-enter Your Password**

Steve Testo

For your security, you must re-enter your password to continue.

Password:

If requested, type in your password in the popup, and then click on « **Submit** ».

**Register as a Facebook Developer**

We need to verify your account to complete your registration. Your phone number will be added to your timeline but won't be visible to your friends.

Country  
France (+33)

Phone Number  
0661034939

Get Confirmation Code

Confirmation Code

You can also verify your account by adding a credit card. [?]

In the popup, type in the Confirmation Code received by sms, and then click on « **Register** ».

**Register as a Facebook Developer**

You're all set! Next, create an app and see all the ways Facebook can help you build, grow and monetize your business.

You are now registered as a Facebook developer. Next step is to create an App ID, click on « **Create App ID** ».



Create a New App ID  
Get started integrating Facebook into your app or website

Display Name  
App\_vocalcom

Contact Email  
testosteve@gmail.com

Category  
Business

By proceeding, you agree to the Facebook Platform Policies

Cancel Create App ID

A new popup opens, type in the name of the app, check your email, choose a category from the drop-down list, and then click on « **Create App ID** ».

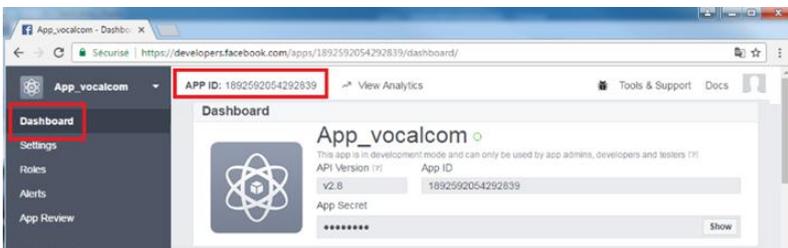
Security Check  
Please enter the text below

PMd5K2

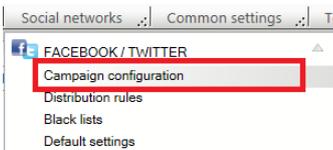
Text in the box:  
PMd5K2

Submit Cancel

In the « **Security check** » popup, type in the captcha text, and click on « **Submit** »



The window « **Dashboard of the app** » opens, showing the app ID. Copy the app ID.



Back to Hermes Admin, select the appropriate site. Then in the « **Social networks** » menu, click on « **Campaigns configuration** » and select the appropriate campaign in the header section.

Then in the « **General tab** », paste the app ID in the field « **App ID/API key** », and click on « **Save** ».

Hermes.Net Administration V5.5

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

Company / site choice  
ROOT  
Abderahim  
TechnicalWriter  
TEST

"The Link" campaigns list

TYPE	QUEUE	READING MESSAGES STATUS	CAMPAIGN NAME
Facebook	500 - Queue_RLT	Login required	RLT_FB
Facebook	-	Inactive	FB_rit

GENERAL \* | INCOMING | CUSTOMER MANAGEMENT | CALLBACKS | SKILLS

PARAMETERS  
Campaign name: FB\_rit  
Publication platform: PlatformPublication

FACEBOOK APPLICATION CONFIGURATION

Canvas URL: https://lab-07-dev-02.vocalcom.com/hermes\_net\_v5/thelink/15a417744724b6b4/

App ID/API Key: 1892592054292839

Secret key: [input field]

Messenger Service Uri: [input field]

Auto response closing message: [input field]

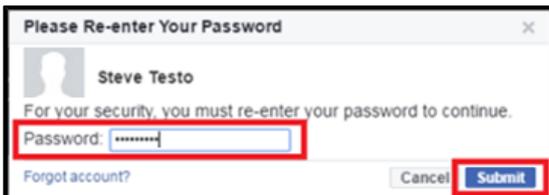
Greeting Message: [input field]

Log on to enable the reading of messages  
Last modifications carried out  
Show managed pages list

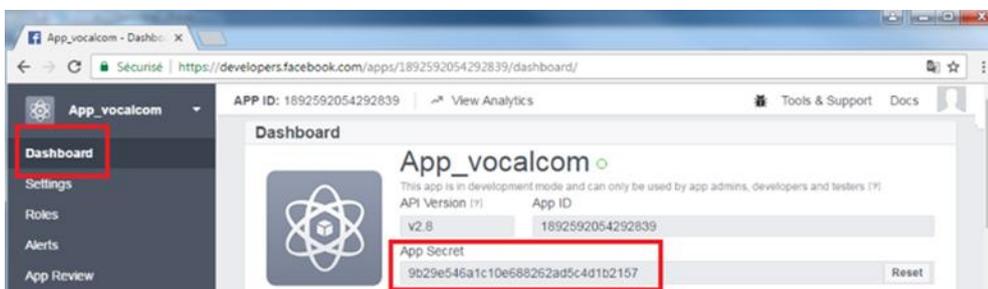
Full Name | First Name | Last Name



In the app dashboard, click on « **Show** » to get the secret key.

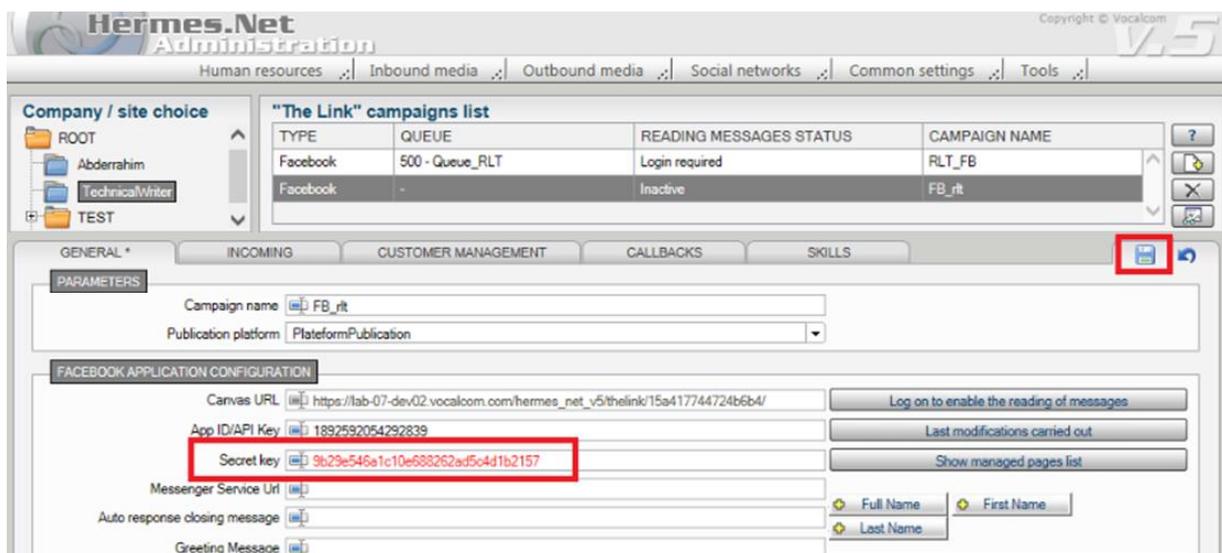


A popup opens, type in your password, then click on « **Submit** ».

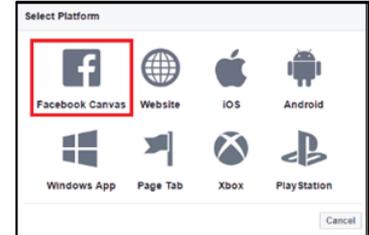
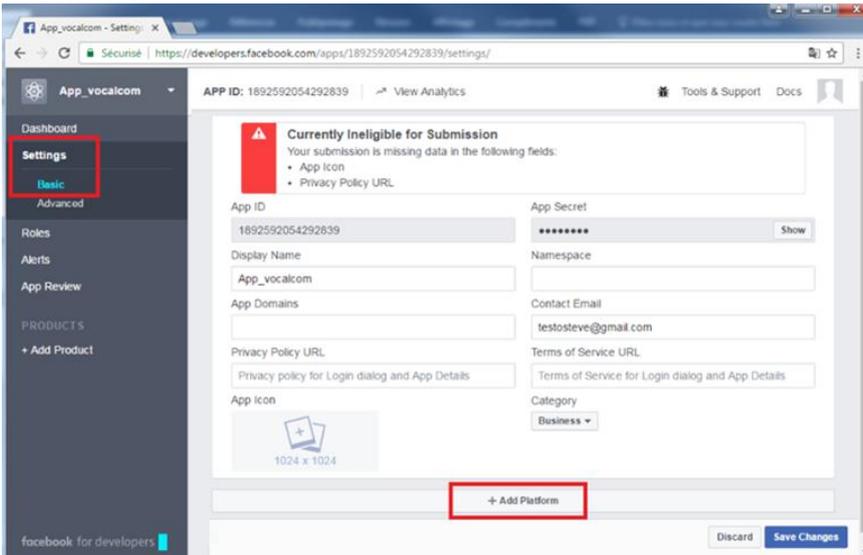


The screen now displays the secret key, copy it.

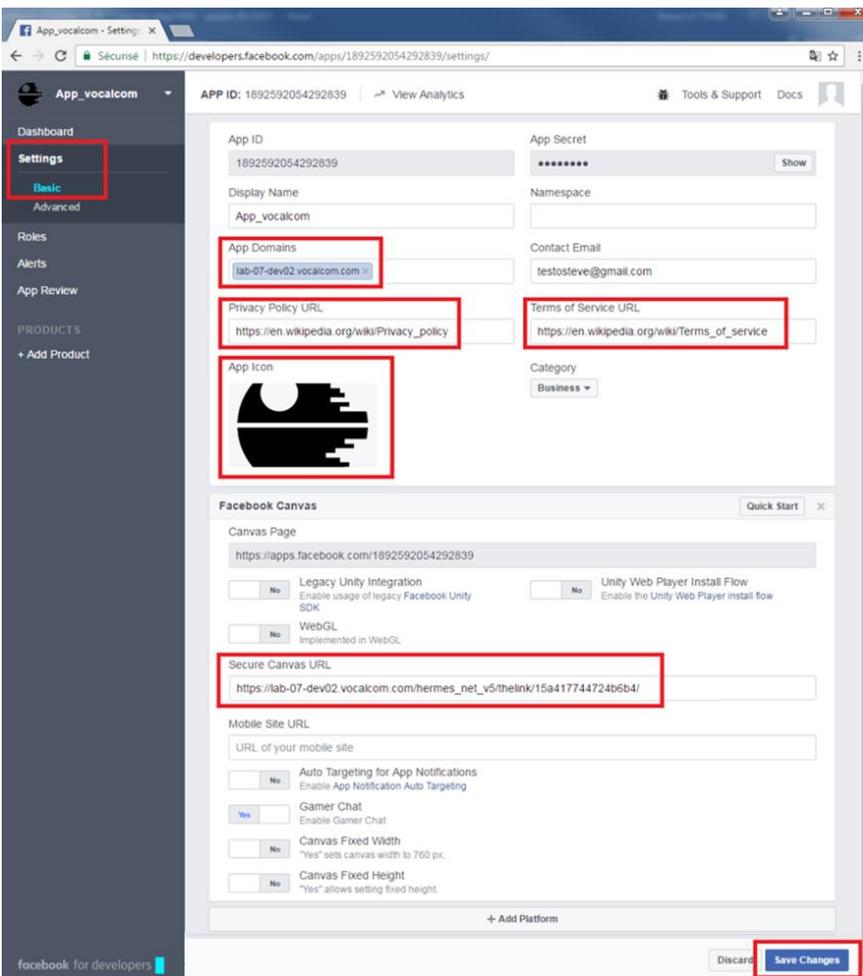
Back to the campaign in Hermes Admin, in the « **General** » tab, paste the App Secret Key in the field « **Secret key** », and then click on « **Save** ».



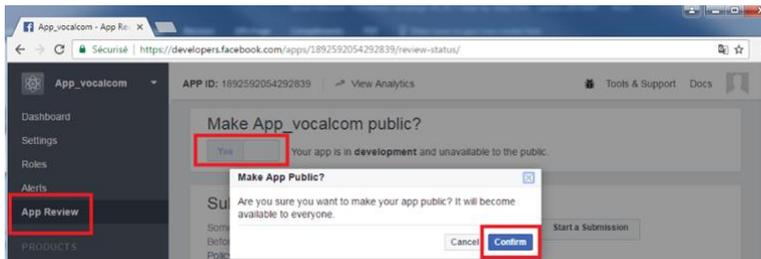
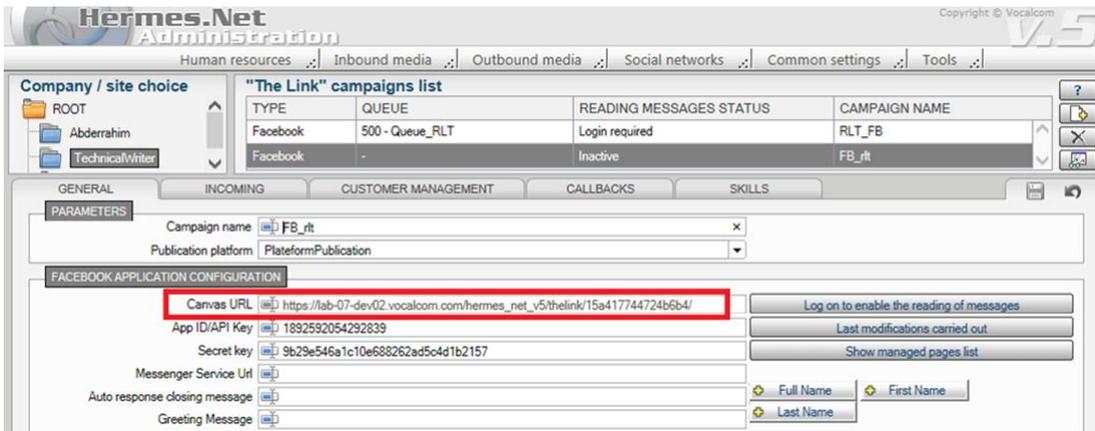
Back on the app page, select « **Settings / Basics** » in the left-side menu. At the bottom of the main screen, click on « **+ Add Platform** », and then, in the popup, click on « **Facebook Canvas** ».



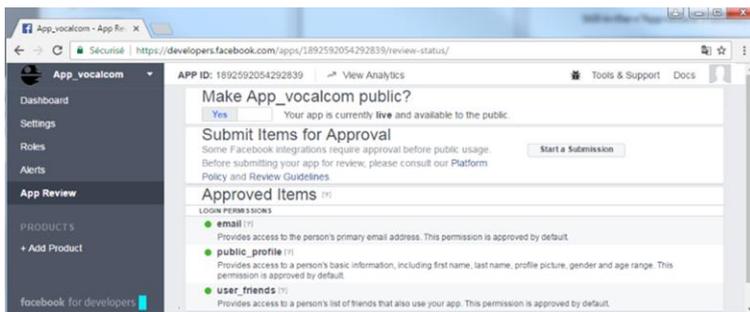
Now, in the upper section of the page, complete « **App Domains** », « **Privacy Policy URL** », « **Terms of Service URL** » and « **Site URL** », upload the « **App Icon** », and then click on « **Save changes** ».



The app is no longer « **ineligible for submission** ». In the lower section of the page, fill in the field « **Secure Canvas URL** » by copying/pasting it from « **Hermes Admin / Social networks / General tab / Facebook application configuration** » (Cf. screenshot below), then click on « **Save Changes** ».



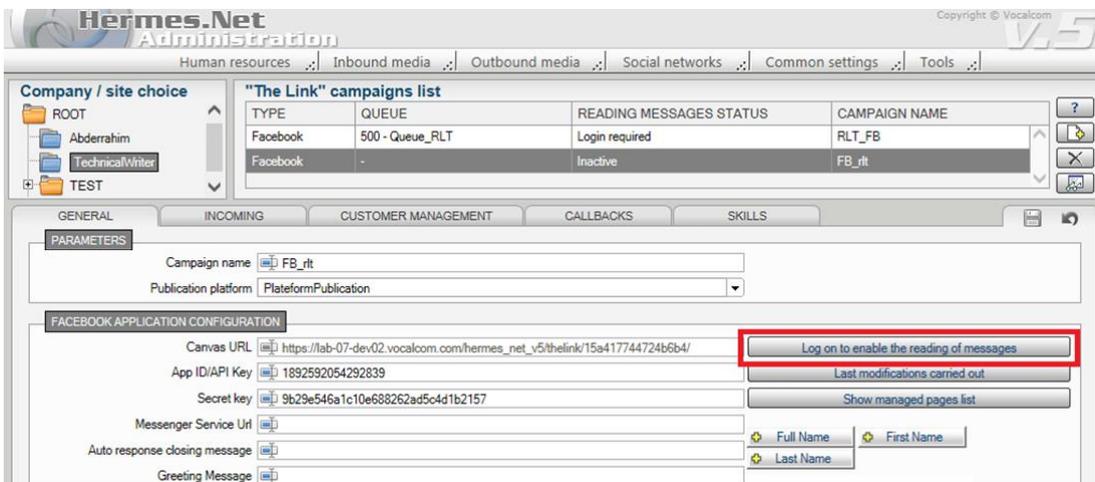
Select the « **App review** » section, set the field « **Make the app public ?** » to « **Yes** », and then confirm in the validation popup.



Submit items for approval, according to Facebook guidelines. The app is now available to the public.

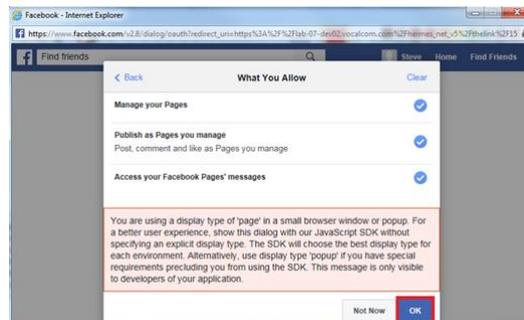
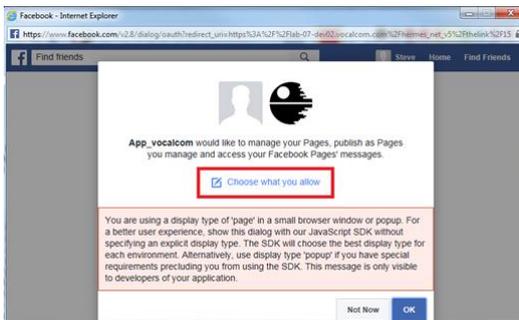
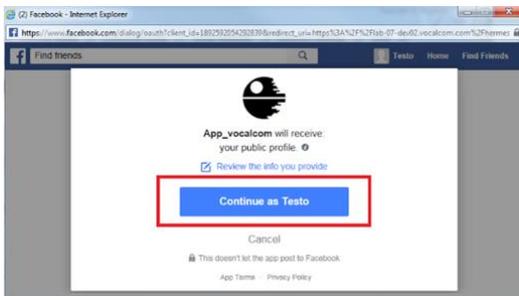
## 2.4 CONNECT THE FACEBOOK APP TO HERMES

In HermesAdmin, open the menu « **Social networks** » and click on « **Campaigns configuration** ». In the « **General** » tab, click on « **Log on to enable the reading of messages** ».



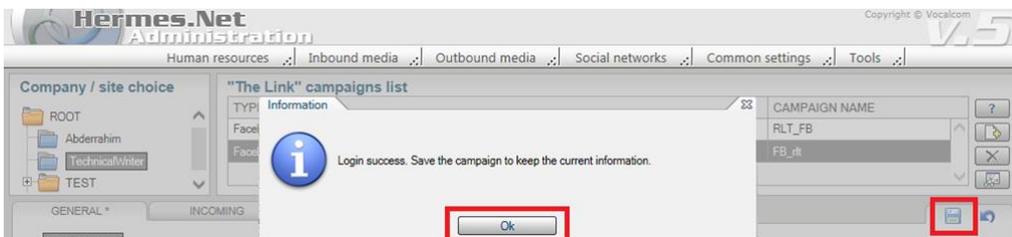


A Facebook window opens, click on « **Continue as (user name)** », then select who can see the page FBVocalcom (*public, friends, etc*), then agree what the user can or cannot do : manage the page, publish on the page (*posts comments & likes*), access messages on the page.

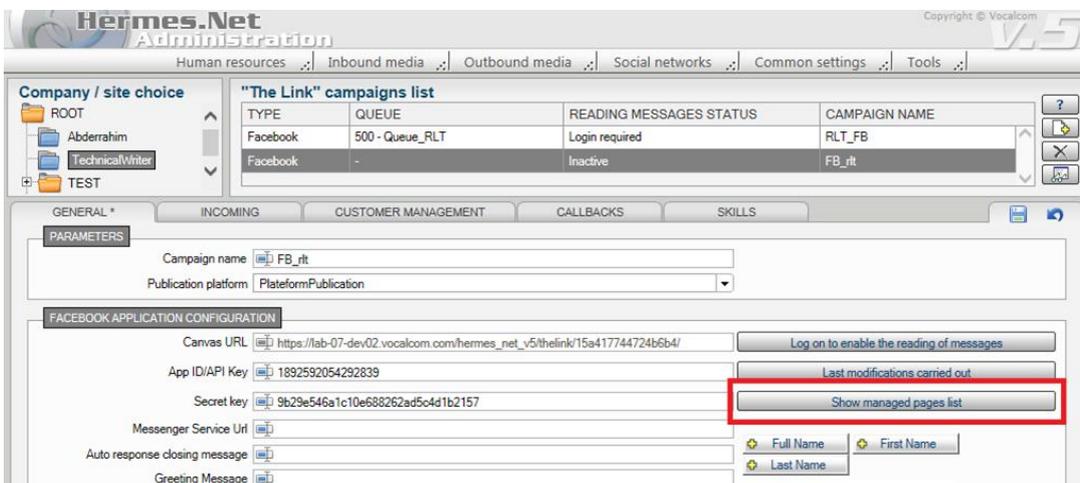


An Hermes window « **Facebook connection** » opens, acknowledge it by clicking on « **Close** ».

Back in **Hermes**, a popup says « **Login success** », click on « **Ok** » in the popup, then on « **Save** » in the « **Hermes Admin** » screen.



Click on the button « **Show managed pages list** ».

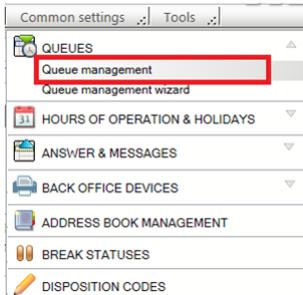




Managed pages list

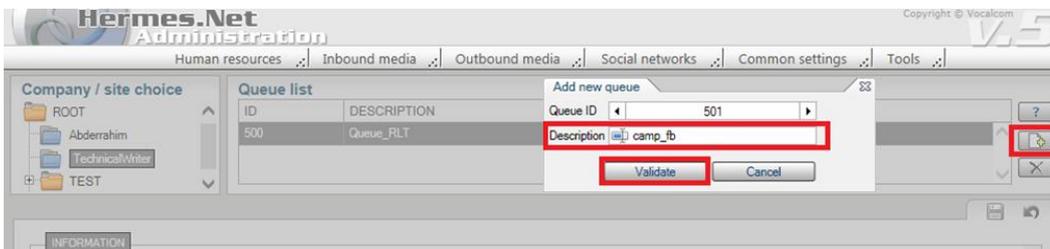
CATEGORY	PAGE NAME	ACCESS TOKEN
Business Service	FBVocalcom	✓

The popup displays « **Category** », « **Name of the page** » and « **Token access** », close it with the upper right cross.

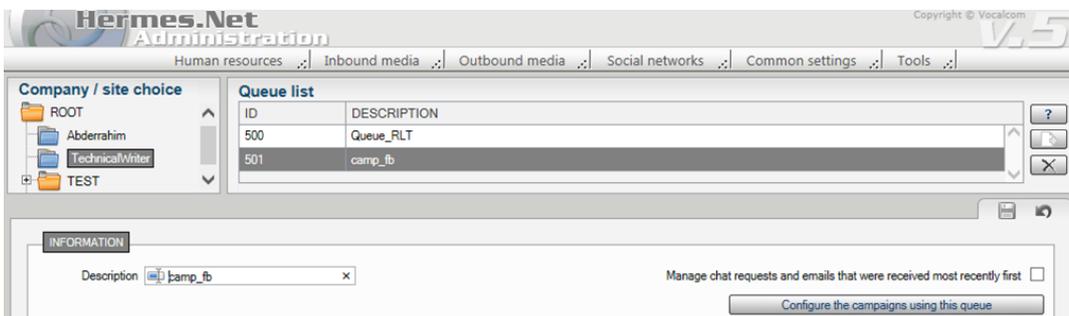


Back on « **Hermes Admin** », in the menu « **Common settings** », click on « **Queue management** ».

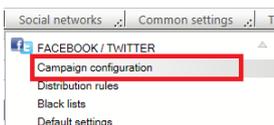
On the left side of the screen, select the site « **TechnicalWriter** », then on the right end of the queues list, click on « **+** ». In the popup, type in the name of the queue and click on « **Validate** ».



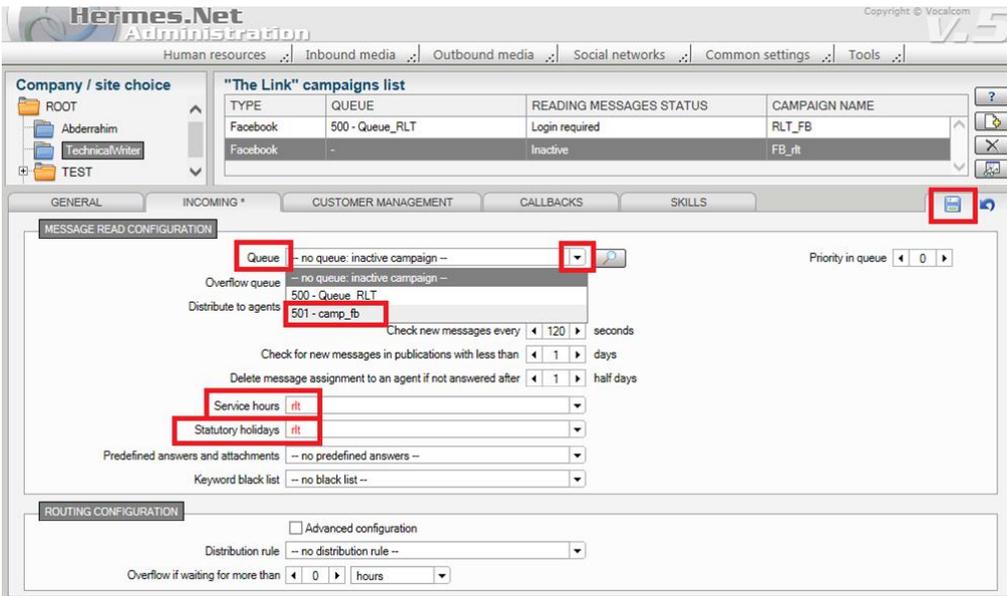
The queue now appears on the list.



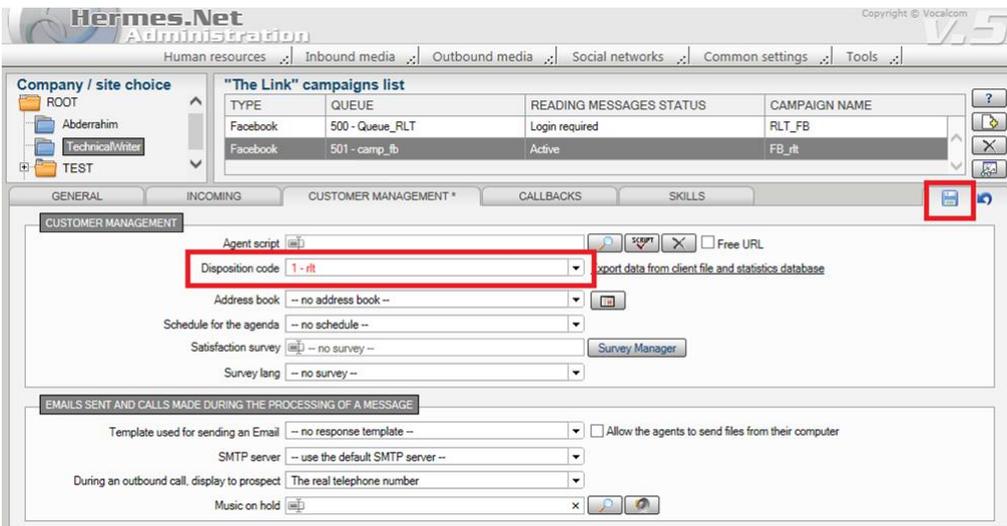
In the menu « **Social networks** », select « **Campaigns configuration** ».



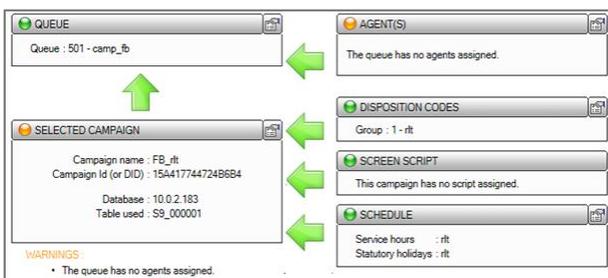
In the header section, select your campaign, and then the « **Incoming** » tab. In the « **Queues** » drop-down list, select the one you just created. On this screen, also complete the fields « **Service hours** » and « **Statutory holidays** », then click on « **Save** ».



On the « Customer management » tab, complete the field « Disposition code » and save.



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.

### 3 REQUIRED COMMON FEATURES

#### 3.1 CREATE OR ASSIGN DISPOSITION CODES

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

#### 3.2 CREATE OR ASSIGN AGENTS TO THE CAMPAIGN

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

#### 3.3 CREATE AGENT WORKSPACE

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

### 4 RECOMMENDED COMMON FEATURES

#### 4.1 CREATE OR ASSIGN SERVICE HOURS

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

### 5 OPTIONAL COMMON FEATURES

#### 5.1 ADD SKILLS

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

#### 5.2 ADD PREDEFINED ANSWERS

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

### 6 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:

Company / site choice: ROOT, TechnicalWriter, TEST, TestSup

TYPE	QUEUE	READING MESSAGES STATUS	CAMPAIGN NAME
Facebook	500 - Queue_RLT	Login required	RLT_FB
Facebook	501 - camp_fb	Active	FB_rit

Summary window details:

- QUEUE: Queue : 501 - camp\_fb
- AGENT(S): 1002 - B Gent
- DISPOSITION CODES: Group : 1 - rit
- SCREEN SCRIPT: This campaign has no script assigned.
- SCHEDULE: Service hours : rit; Statutory holidays : rit

Selected Campaign details:

- Campaign name : FB\_rit
- Campaign Id (or DID) : 15A4177447248684
- Database : 10.0.2.183
- Table used : S9\_000001

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

## 7 TEST AS AN AGENT

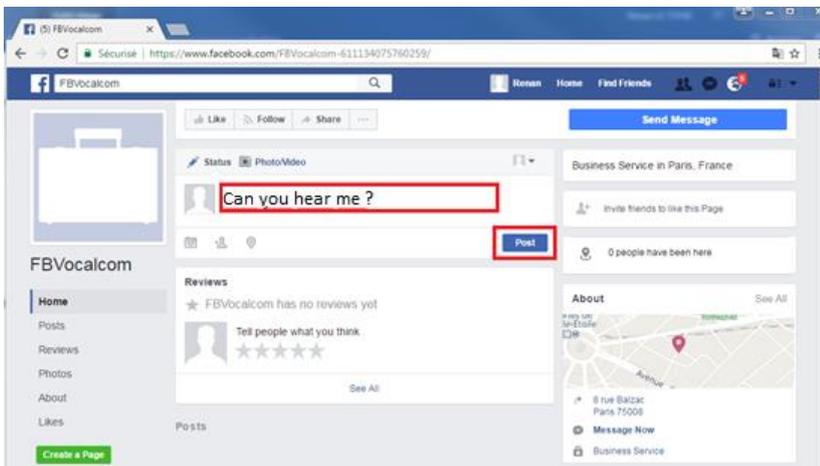
Back on Hermes.Net connection screen, in the « **Identification** » tab, log in with ID/Password of the agent, and then in the « **applications** » sub-tab, select the site « **TechnicalWriter** ». Then in the « **Agent** » sub-tab, select the agent and click on « start the agent application ».



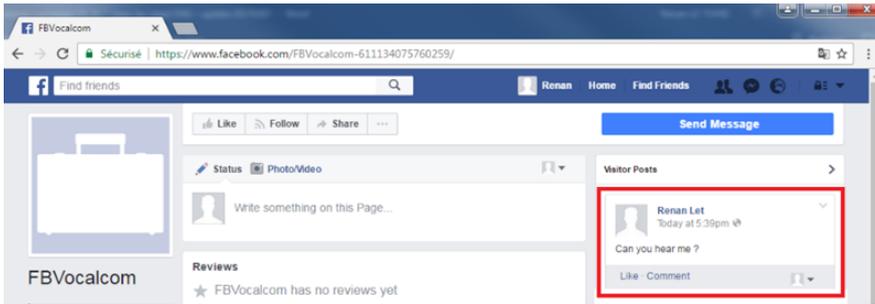
In the agent workspace, in the « **Status** » header, click on « **Queues** ». In the popup, tick the box for the queue, then click on « **Confirm the queues' settings** ». Then, in the header, click on « **Start** ».



Connect to Facebook as a lambda user, and post a comment on the app's page (*here, FBVocalcom*).



The comment appears in the « **Visitor posts** » section of the page, and on the agent's screen.



The agent can interact (*like and/or comment*) on the visitor's post, via Hermes.



In order to reply, the agent types his text in the purple zone, on the right side of the screen, and then clicks on « **Comment on this post** ». The reply appears in the left side of the screen.



The exchange is also updated on the Facebook page.

