

# Social network 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 a social network campaign (Twitter & Facebook) 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 SOCIAL NETWORK 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 default settings
- 6 – Création de la File d'Attente
- 7 – Create your campaign and set up the general parameters
- 8 – Create or assign your agents
- 9 – Create or assign your supervisors
- 10 – Create or assign your service hours
- 11 – Create or assign your holidays plan
- 12 – Create or assign your call status
- 13 – Create your address book (if you plan on using the agenda)
- 14 – Create or assign your salesmen's planning (if you plan on using the agenda)
- 15 – Create or assign your salesmen (if you plan on using the agenda)
- 16 – Distribution rules (*optional*)
- 17 – Black lists (*optional*)
- 18 – Check the summary of your campaign

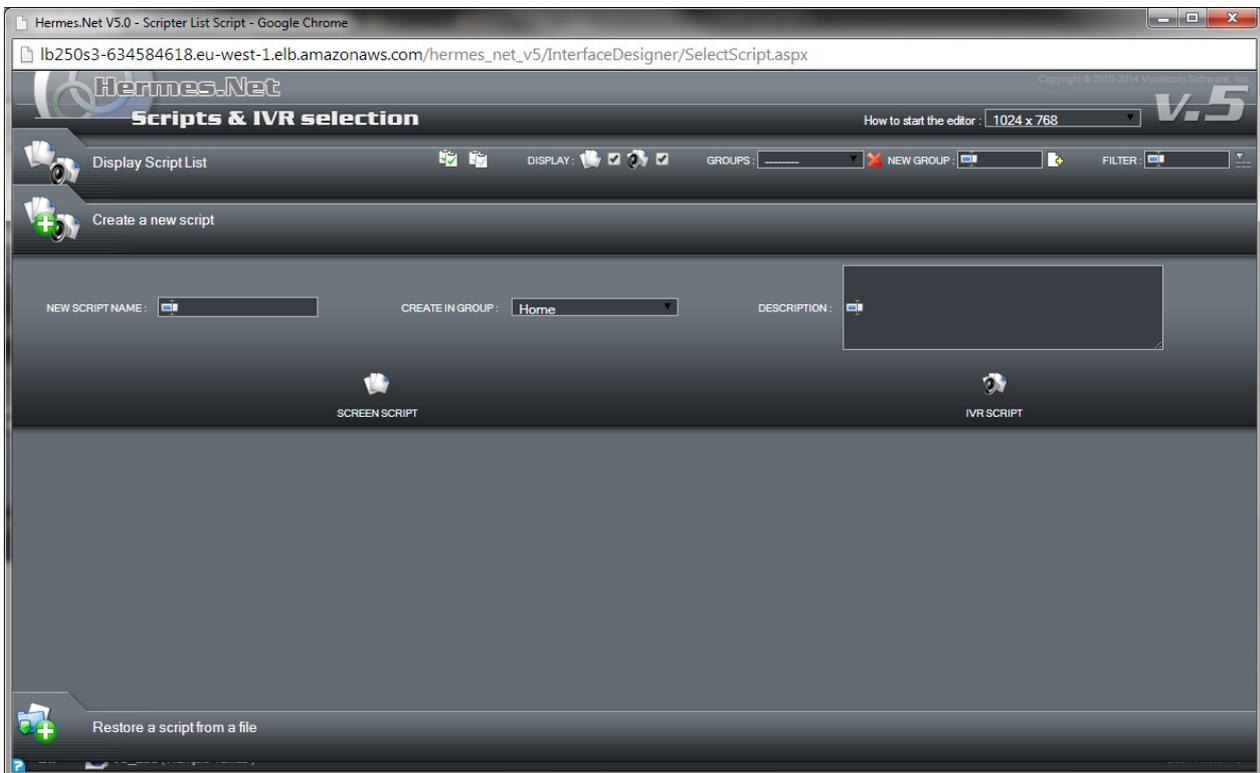
## What to do in the Interface Designer module



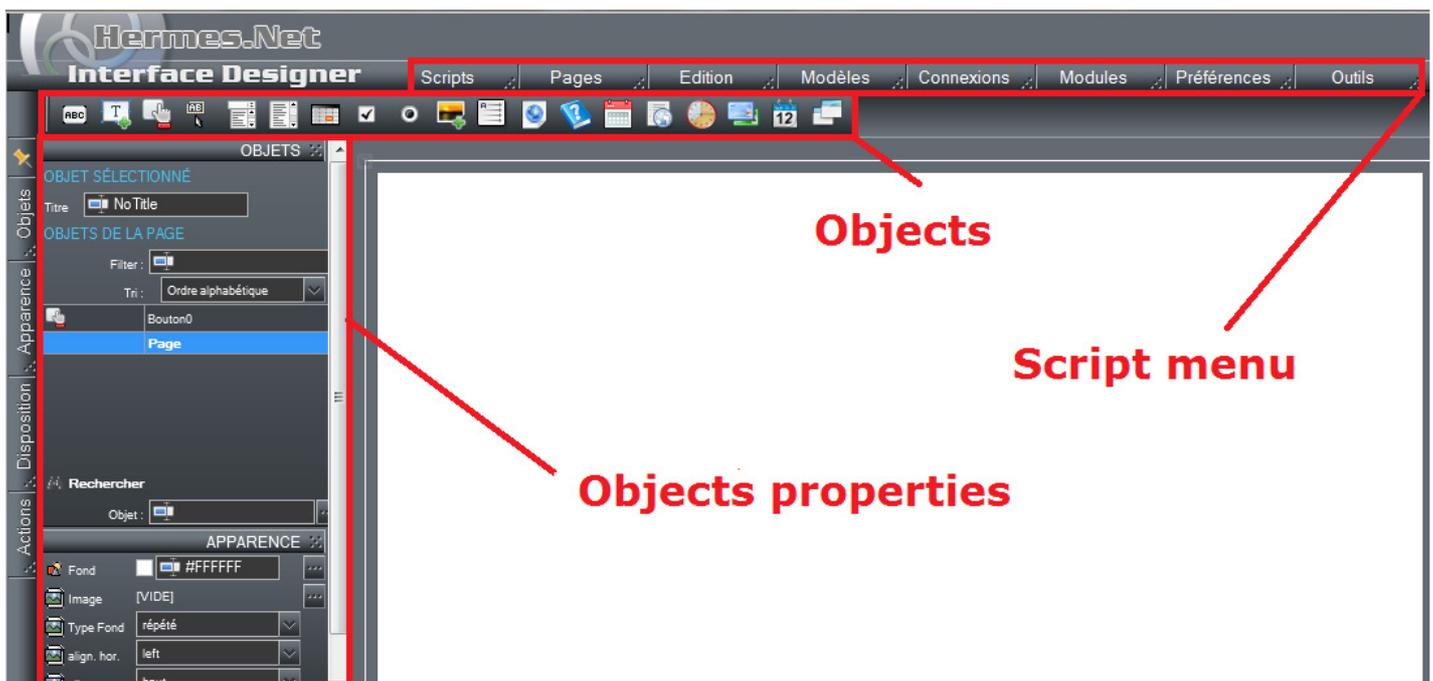
### 1- Create your script

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.

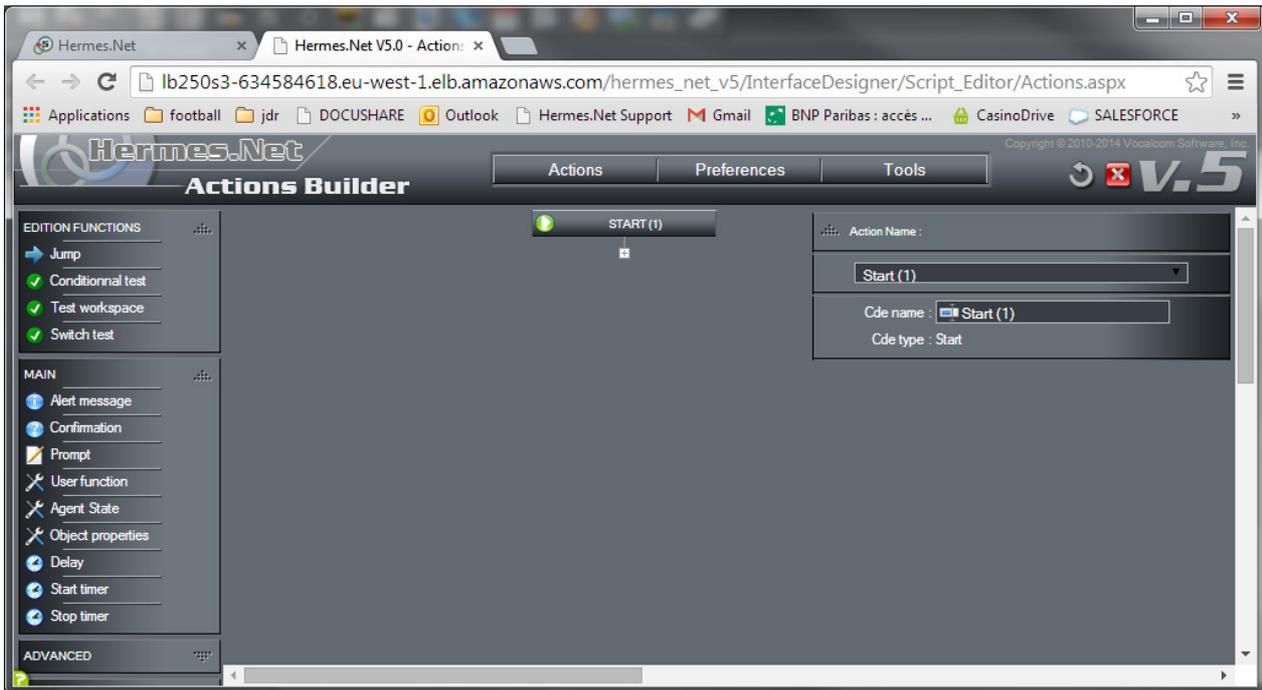
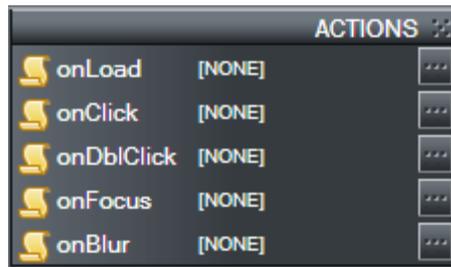
In the module, click on « **Create a new script** » and create a new screen script, give it a name and a description.  
Once the script is created, you can access it directly from the home menu Hermes V5 through the function « **Edit this script** ».



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.

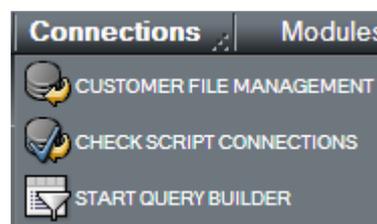


For more help on the actions, please refer to the **"Interface Designer"** document, existing for V5.

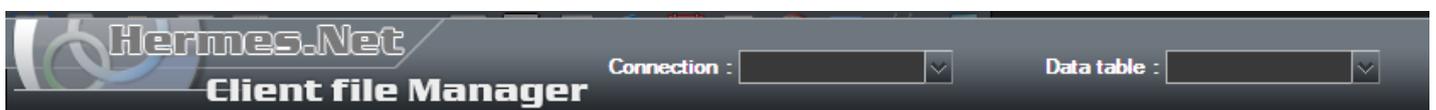
## 2- Create the Client file

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

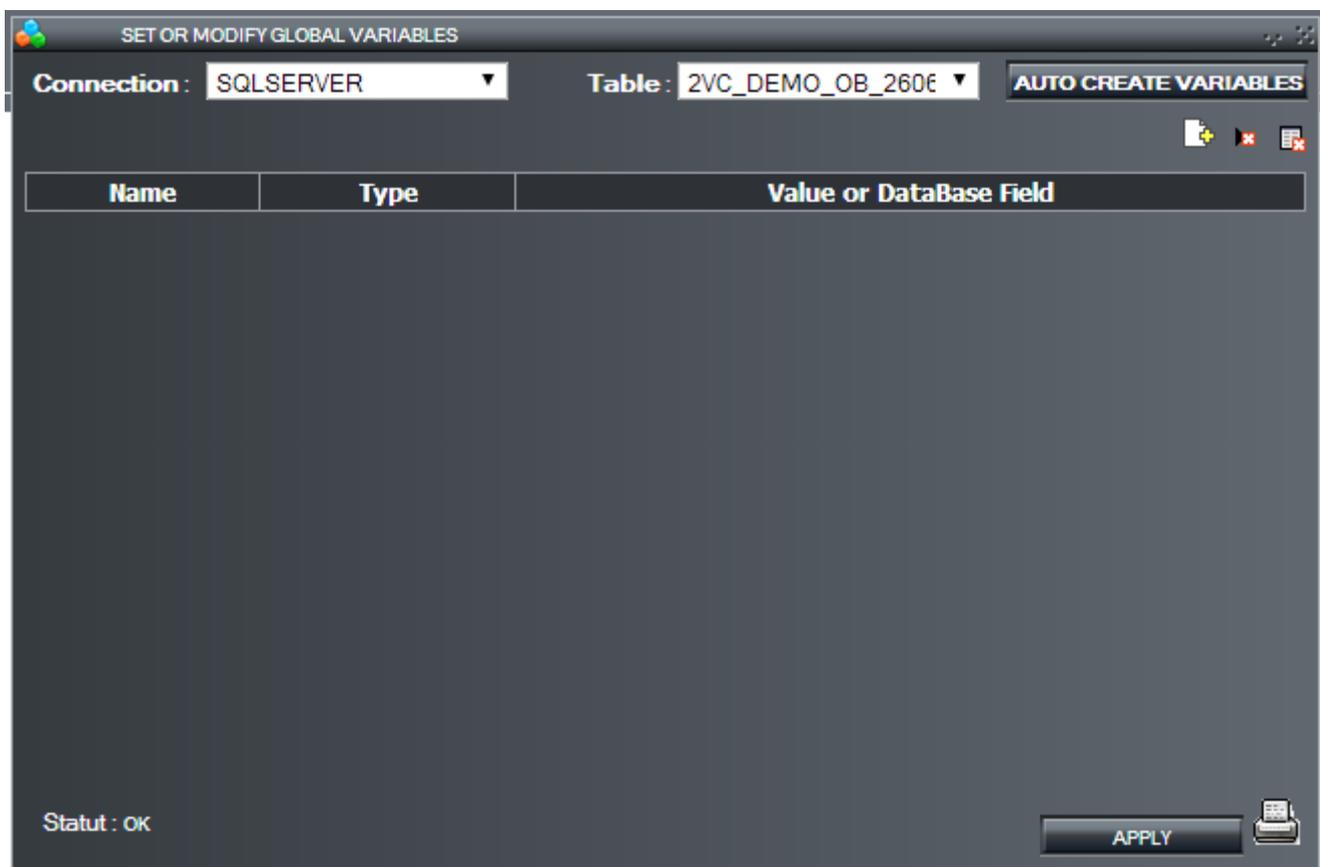
Once your client file is done, you'll have to take care of the global variables set in your text (ex: \$CITY). It is important that you tick the box « **Evaluate** » in the « **Behavior** » properties of your text, in order for the software to check the variables placed there.

Une fois votre fichier client créé, il faut vous occuper des différentes variables que vous avez placées dans vos champs texte (ex : \$NOM). Pensez bien à cocher la case « **Evaluer** » dans les propriétés « Comportement » du champ texte.

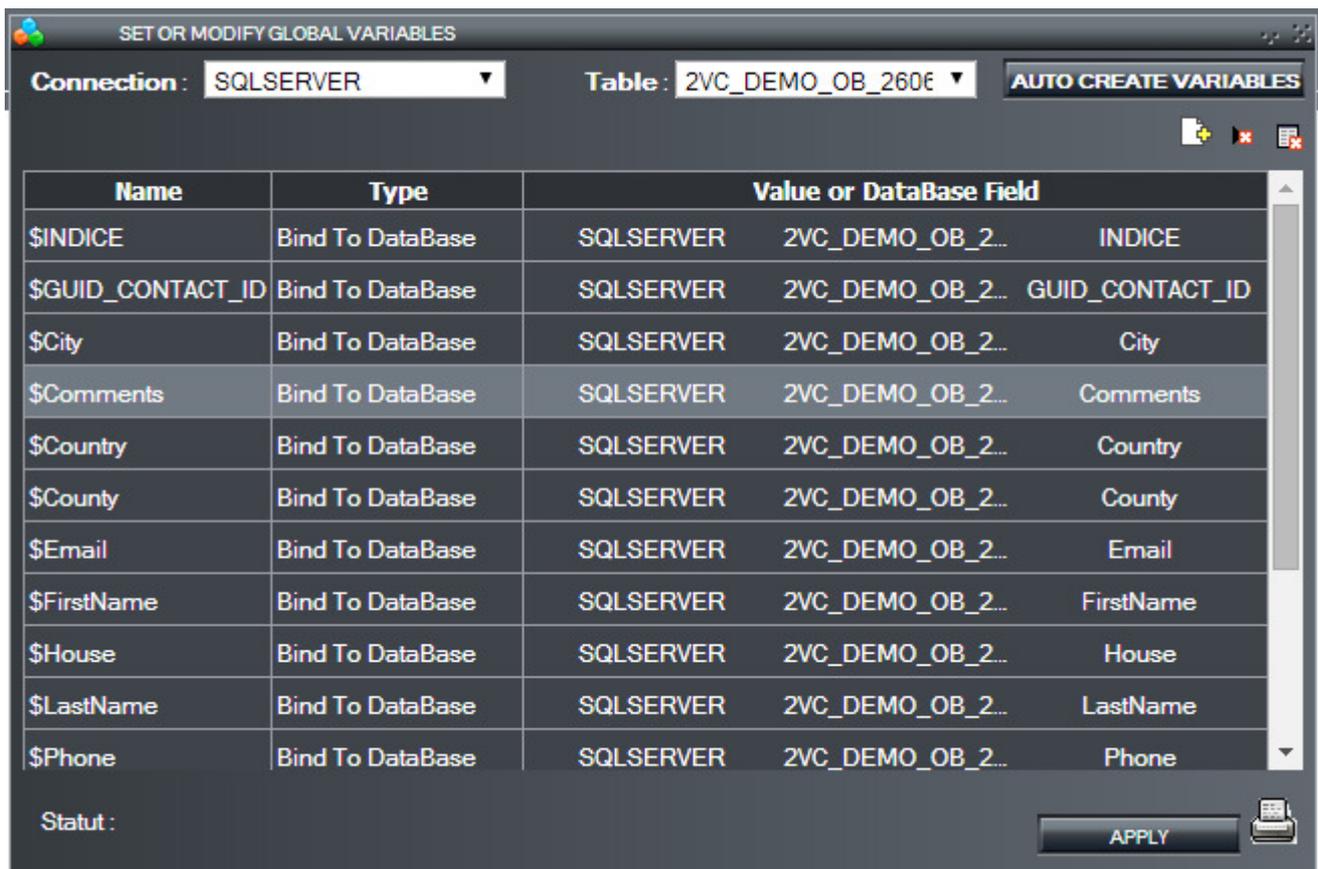
Click on the « **Modules** » menu, and select « **Set global variables** »:



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.

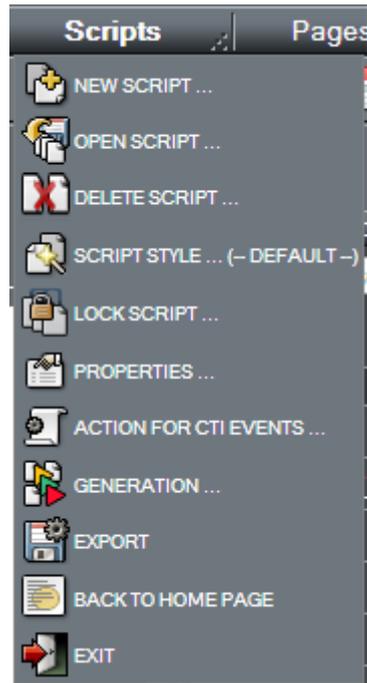


**NOTE: In case you have variables only appearing in actions, remember to add them manually to the list of global variables with a « « value.**

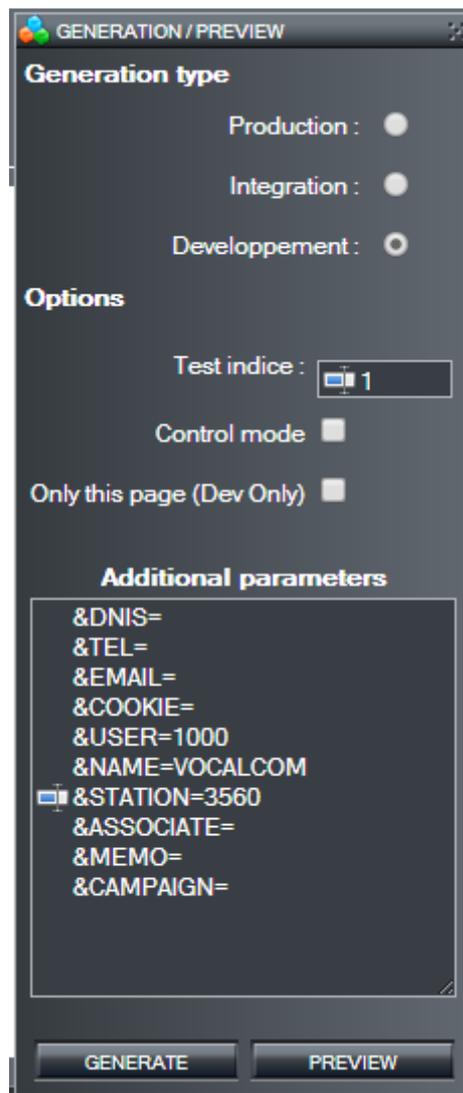
#### 4- Generate the script in production mode

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

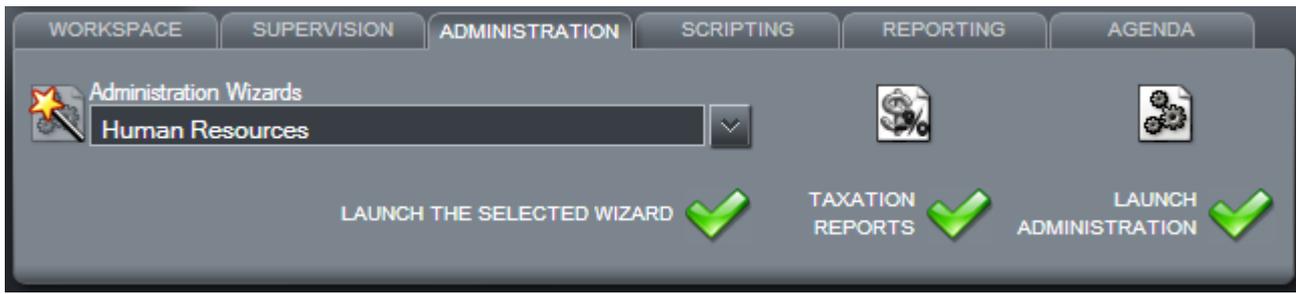
Click on the **"Scripts"** menu, and select **"Generation"**:



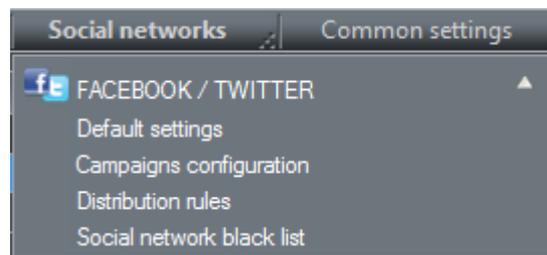
Click on **Generate**, after having selected the « **Production** » mode.



## What to do in the Administration module



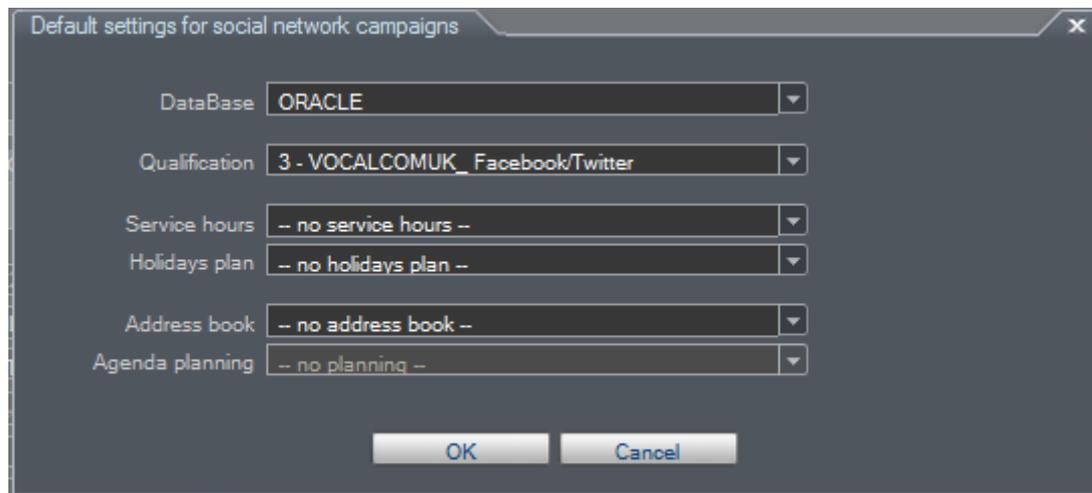
Once the admin module is open, you can navigate through the « **Social network** » menu.



### 5- Default settings

This menu allows you to configure all the settings common to all your social network campaigns, meaning:

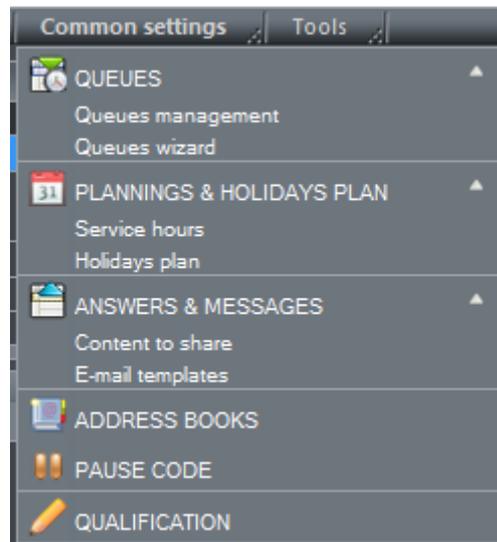
- Database** used
- Qualifications**
- Service hours & holidays plan** (for the agents)
- Address book & agenda planning** (for agenda use)



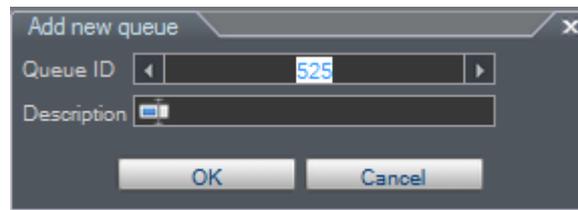
These elements are created as usual in the other Administration menus.

### 6- Creating the 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.



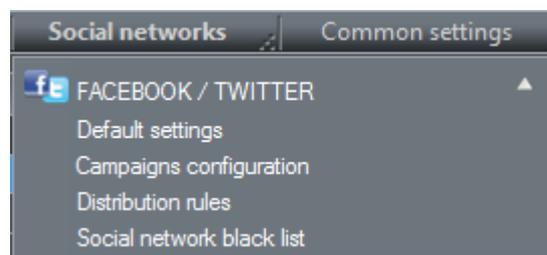
## 7- Create your campaign and set up the general parameters

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**.

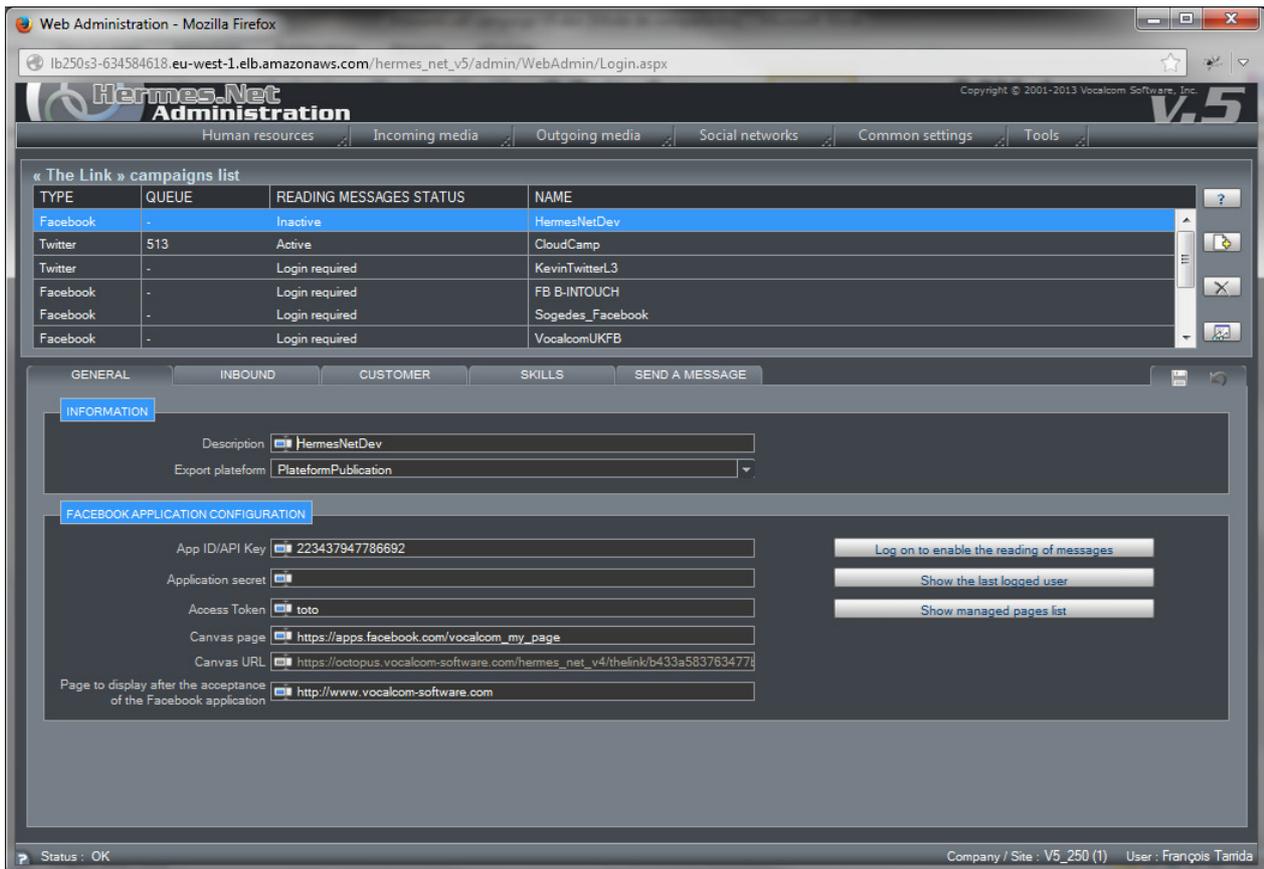


**NOTE: The "Default Settings" sub-menu allows you to create parameters for all your inbound campaigns, applied by default.**

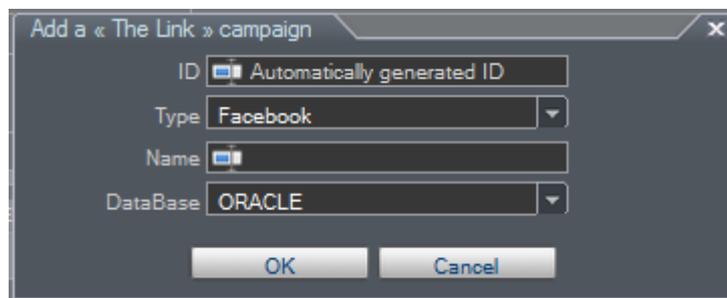
Click on the « **Social network** » menu, and select « **Campaigns configuration** »:



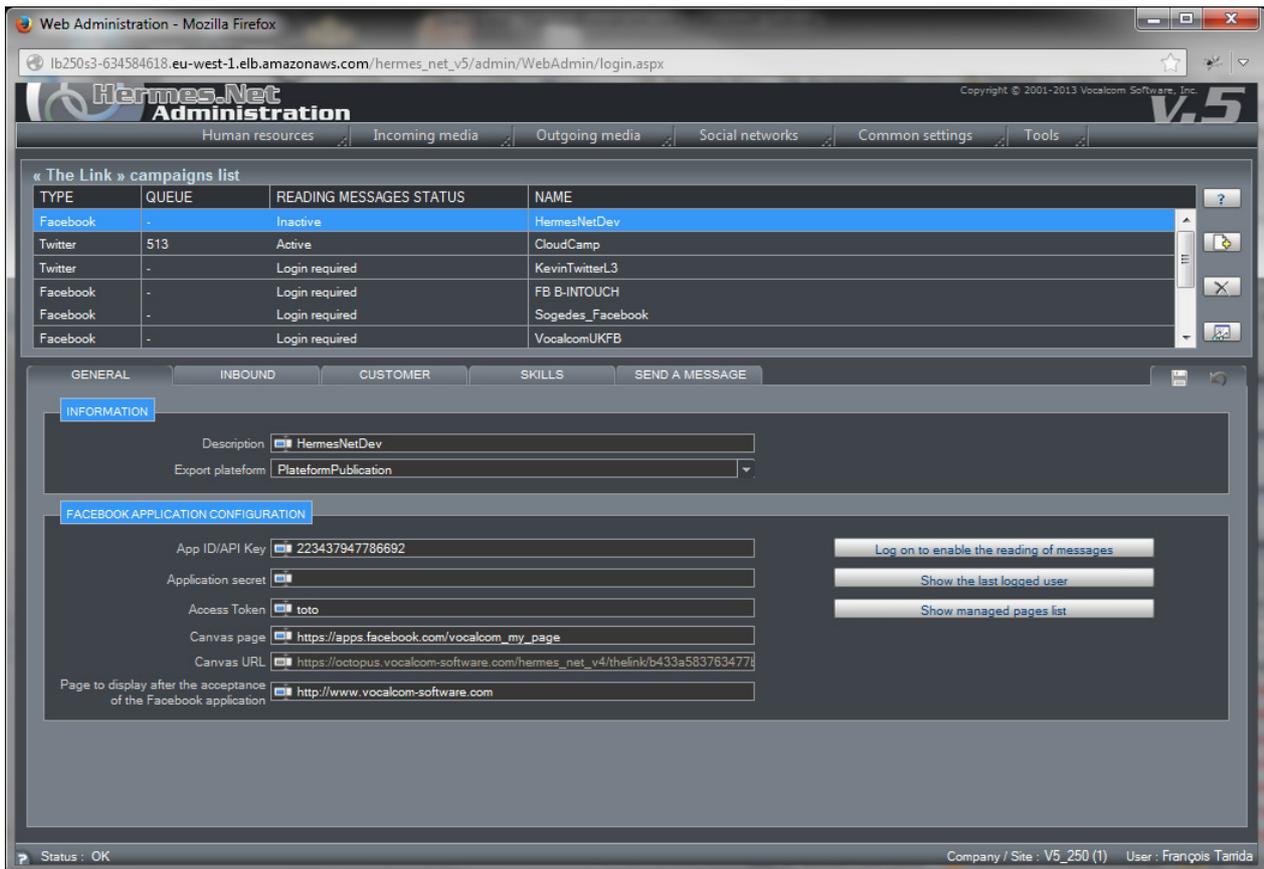
Click on « **Add new** »  to create a new campaign:



Choose the type of campaign you want (Twitter or Facebook), as well as the name of the new campaign and the database connection. Click on **OK**.



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



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

« The Link » campaigns list

| TYPE     | QUEUE | READING MESSAGES STATUS | NAME             |
|----------|-------|-------------------------|------------------|
| Facebook | -     | Inactive                | HermesNetDev     |
| Twitter  | 513   | Active                  | CloudCamp        |
| Twitter  | -     | Login required          | KevinTwitterL3   |
| Facebook | -     | Login required          | FB B-INTOUCH     |
| Facebook | -     | Login required          | Sogedes_Facebook |
| Facebook | -     | Login required          | VocalcomUKFB     |

GENERAL INBOUND CUSTOMER SKILLS SEND A MESSAGE

INFORMATION

Description: HermesNetDev  
 Export platform: PlateformPublication

FACEBOOK APPLICATION CONFIGURATION

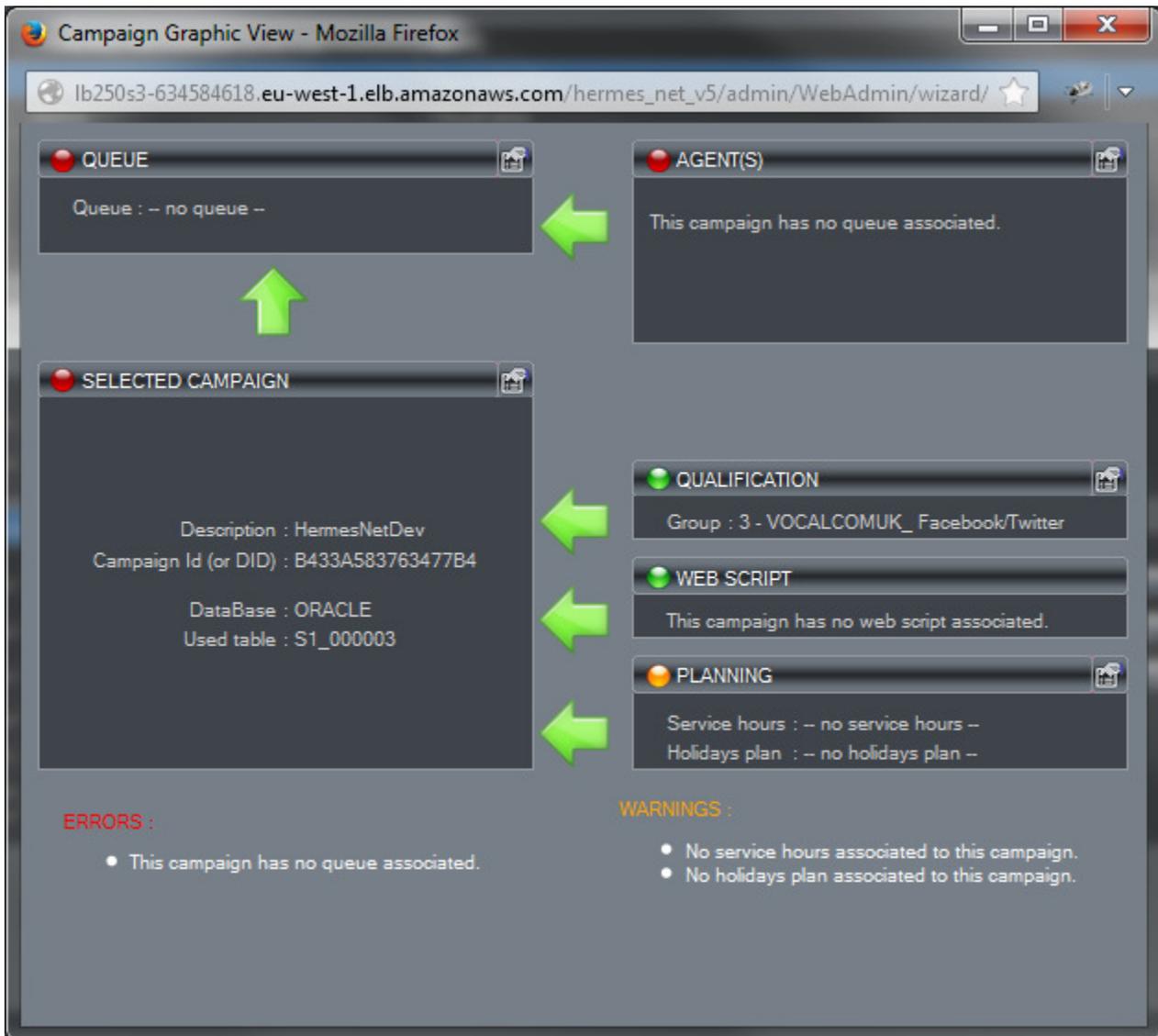
App ID/API Key: 223437947786692  
 Application secret: [REDACTED]  
 Access Token: toto  
 Canvas page: https://apps.facebook.com/vocalcom\_my\_page  
 Canvas URL: https://octopus.vocalcom-software.com/hermes\_net\_v4/thelink/b433a583763477  
 Page to display after the acceptance of the Facebook application: http://www.vocalcom-software.com

Buttons: Log on to enable the reading of messages, Show the last logged user, Show managed pages list

Status: OK Company / Site : V5\_250 (1) User : François Tamida

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.**

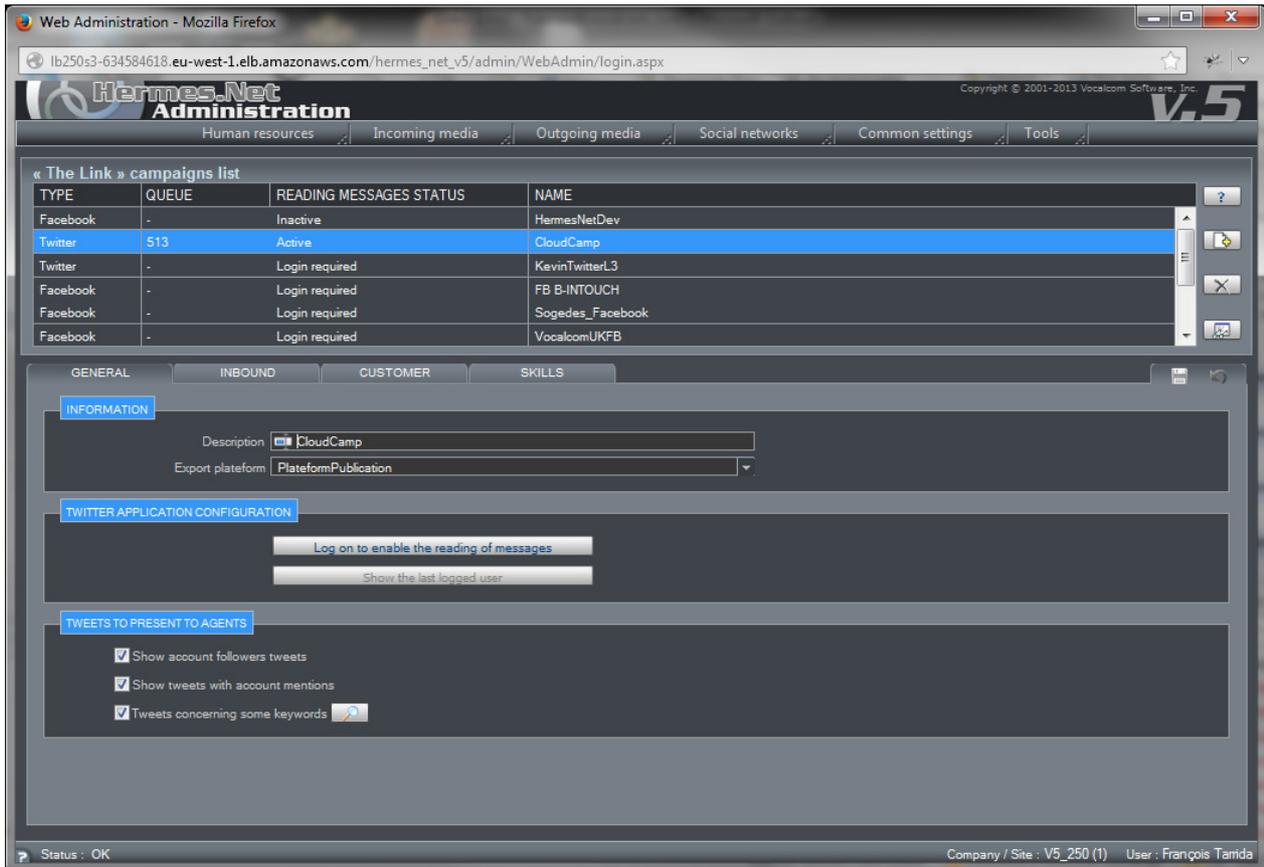




- A green dot means the element is set up correctly.
- An orange dot means that alerts have been detected. The campaign could be started, but maybe won't work correctly.
- A red dot means that alerts have been detected. The campaign won't work at all.

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

**Twitter campaign:**



The screenshot shows the 'Hermes.Net Administration V.5' web interface. At the top, there is a navigation menu with options: Human resources, Incoming media, Outgoing media, Social networks, Common settings, and Tools. Below this is a table titled '« The Link » campaigns list'.

| TYPE     | QUEUE | READING MESSAGES STATUS | NAME             |
|----------|-------|-------------------------|------------------|
| Facebook | -     | Inactive                | HermesNetDev     |
| Twitter  | 513   | Active                  | CloudCamp        |
| Twitter  | -     | Login required          | KevinTwitterL3   |
| Facebook | -     | Login required          | FB B-INTOUCH     |
| Facebook | -     | Login required          | Sogedes_Facebook |
| Facebook | -     | Login required          | VocalcomUKFB     |

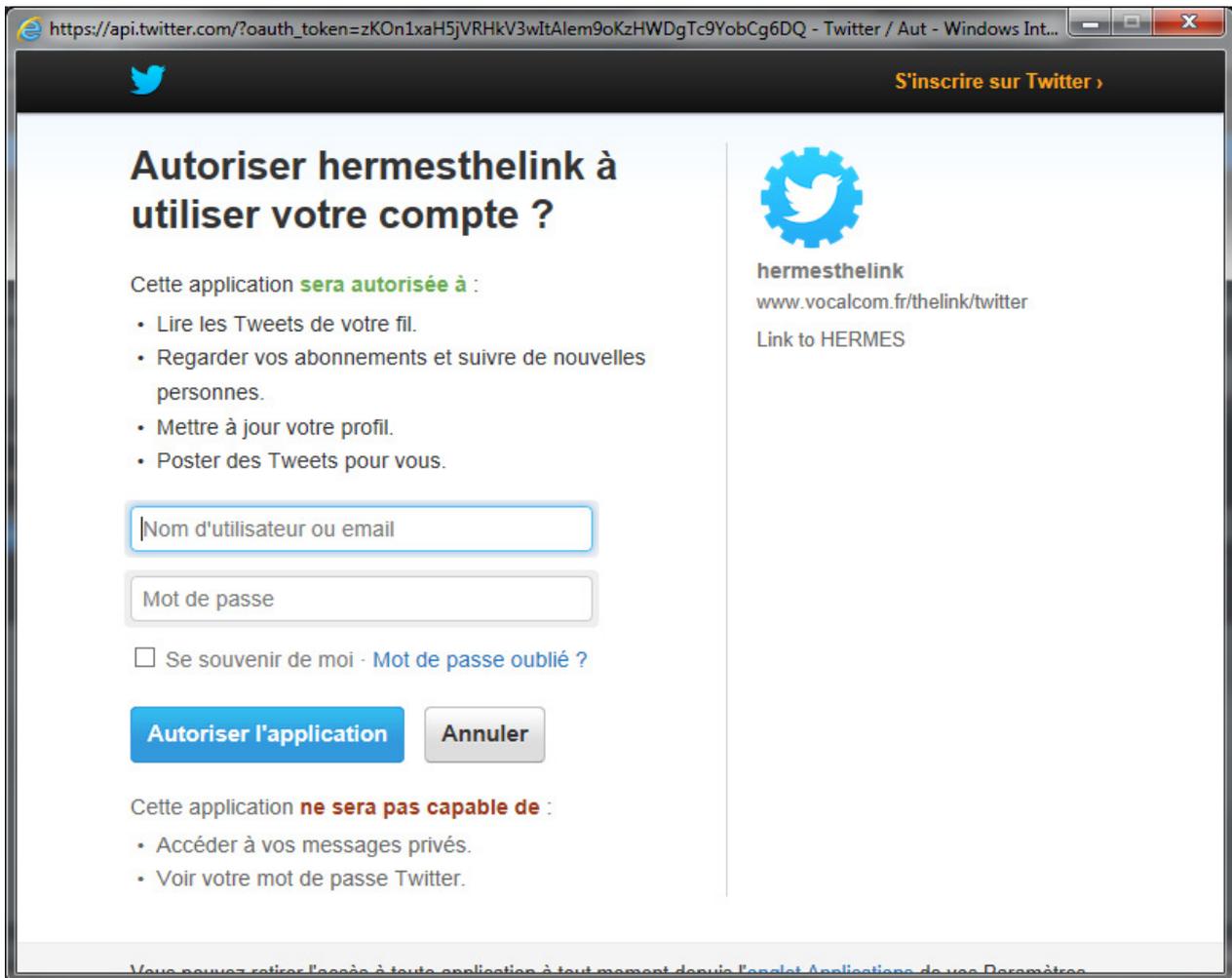
Below the table, there are tabs for GENERAL, INBOUND, CUSTOMER, and SKILLS. The 'INBOUND' tab is selected, showing configuration options for the 'CloudCamp' campaign:

- INFORMATION:** Description: CloudCamp, Export platform: PlateformPublication
- TWITTER APPLICATION CONFIGURATION:** Log on to enable the reading of messages, Show the last logged user
- TWEETS TO PRESENT TO AGENTS:**
  - Show account followers tweets
  - Show tweets with account mentions
  - Tweets concerning some keywords

At the bottom, the status is 'OK' and the user is 'François Tamida'.

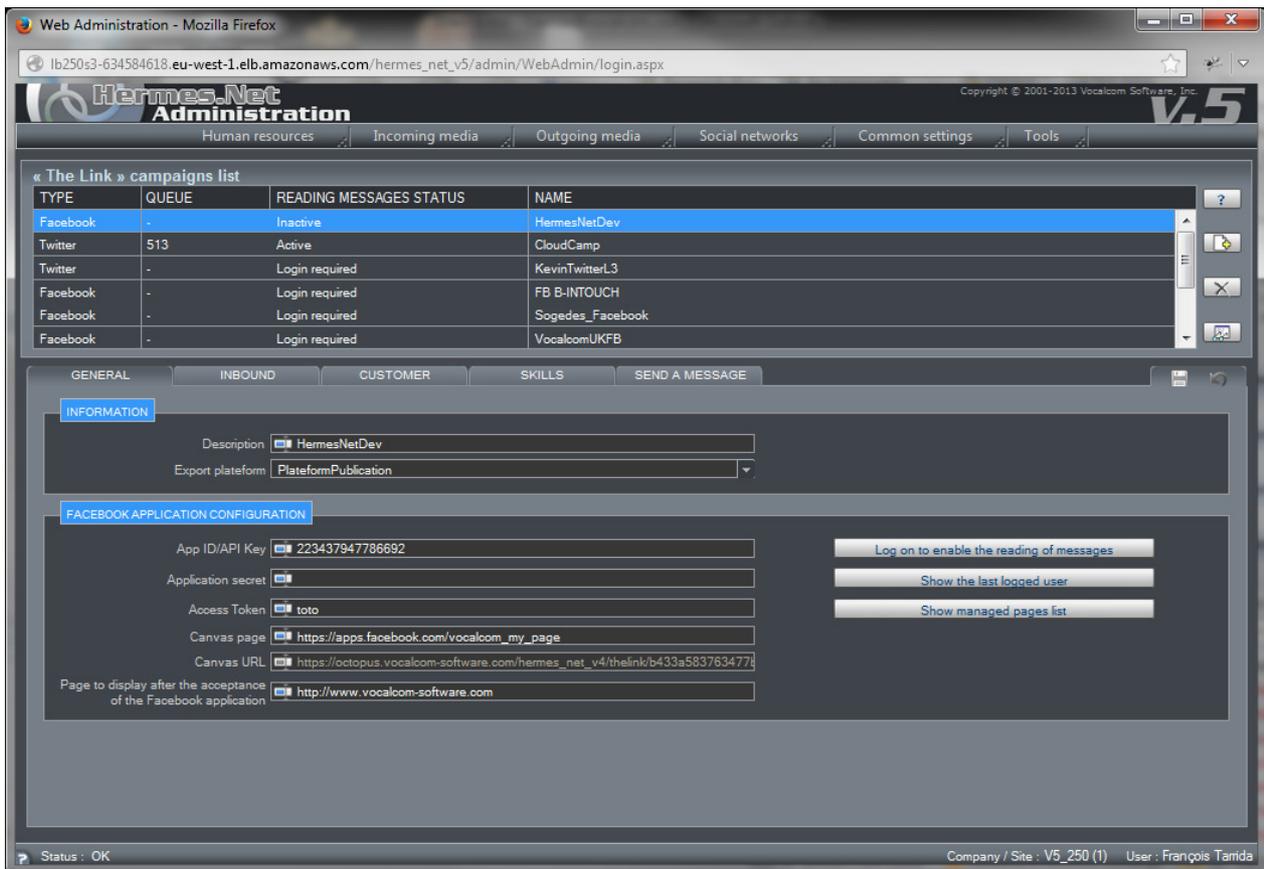
- campaign title
- platform publication (as declared at the ROOT level)

**-Twitter app config:**



The screenshot shows a web browser window with the URL `https://api.twitter.com/?oauth_token=zKOn1xaH5jVRHkV3wtAlem9oKzHWDgTc9YobCg6DQ`. The page title is "Autoriser hermelink à utiliser votre compte ?". The Twitter logo is in the top left, and a link "S'inscrire sur Twitter" is in the top right. The main content is divided into two columns. The left column contains the heading "Autoriser hermelink à utiliser votre compte ?" and a list of permissions: "Lire les Tweets de votre fil", "Regarder vos abonnements et suivre de nouvelles personnes", "Mettre à jour votre profil", and "Poster des Tweets pour vous". Below this is a form with fields for "Nom d'utilisateur ou email" and "Mot de passe", and a checkbox for "Se souvenir de moi". There are two buttons: "Autoriser l'application" (blue) and "Annuler" (grey). The right column features the application logo (a blue gear with a bird), the name "hermelink", the URL "www.vocalcom.fr/thelink/twitter", and the text "Link to HERMES". At the bottom, a small note states: "Vous pouvez retirer l'accès à toute application à tout moment depuis l'onglet Applications de vos Paramètres".

## Facebook Campaign:



The screenshot shows the 'Hermes.Net Administration' interface. At the top, there are navigation tabs: Human resources, Incoming media, Outgoing media, Social networks, Common settings, and Tools. The main content area is titled '« The Link » campaigns list' and contains a table with the following data:

| TYPE     | QUEUE | READING MESSAGES STATUS | NAME             |
|----------|-------|-------------------------|------------------|
| Facebook | -     | Inactive                | HermesNetDev     |
| Twitter  | 513   | Active                  | CloudCamp        |
| Twitter  | -     | Login required          | KevinTwitterL3   |
| Facebook | -     | Login required          | FB B-INTOUCH     |
| Facebook | -     | Login required          | Sogedes_Facebook |
| Facebook | -     | Login required          | VocalcomUKFB     |

Below the table, there are tabs for GENERAL, INBOUND, CUSTOMER, SKILLS, and SEND A MESSAGE. The 'GENERAL' tab is active, showing an 'INFORMATION' section with the following fields:

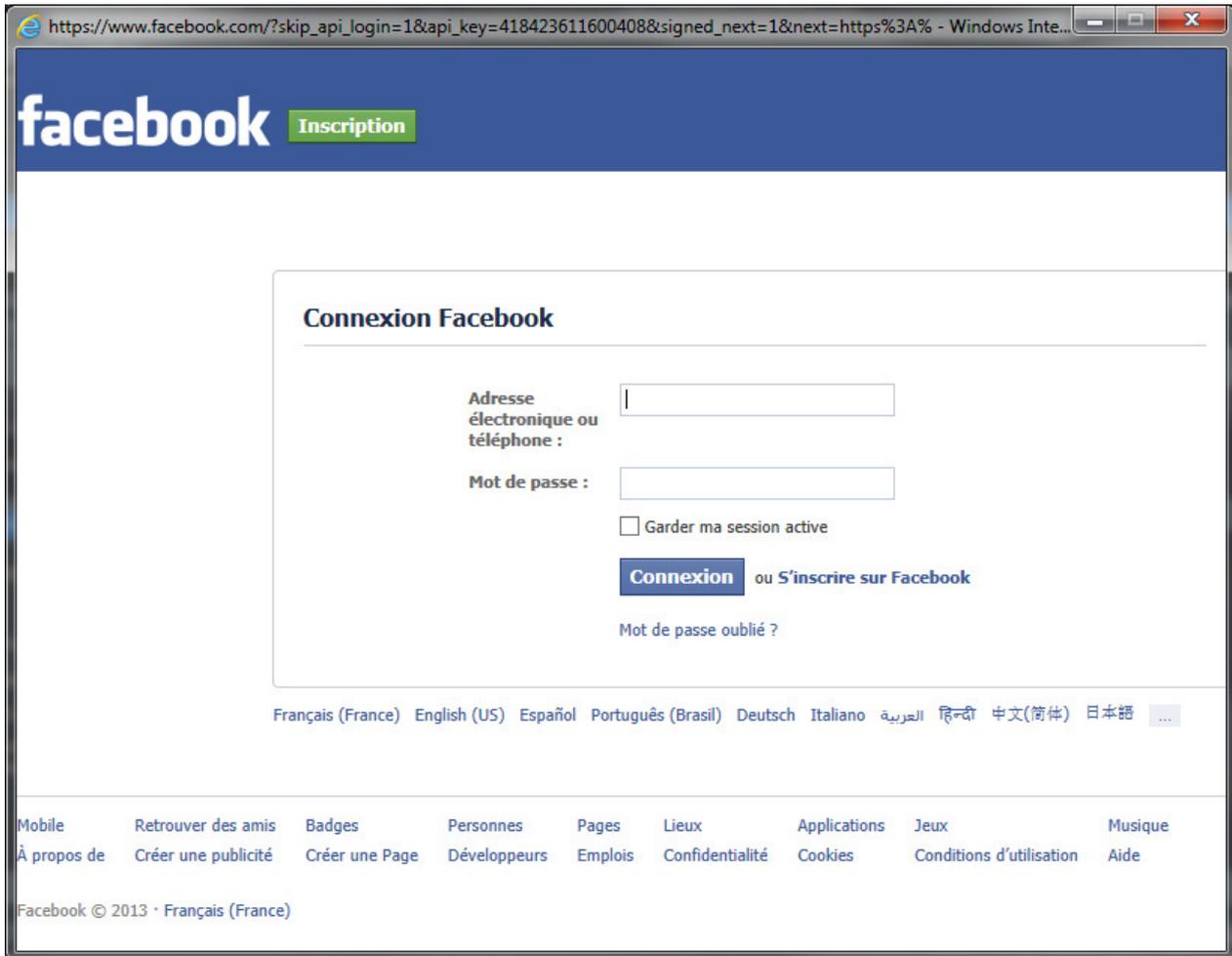
- Description: HermesNetDev
- Export platform: PlatformPublication

The 'FACEBOOK APPLICATION CONFIGURATION' section contains the following fields:

- App ID/API Key: 223437947786692
- Application secret: [redacted]
- Access Token: toto
- Canvas page: https://apps.facebook.com/vocalcom\_my\_page
- Canvas URL: https://octopus.vocalcom-software.com/hermes\_net\_v4/thelink/b433a583763477
- Page to display after the acceptance of the Facebook application: http://www.vocalcom-software.com

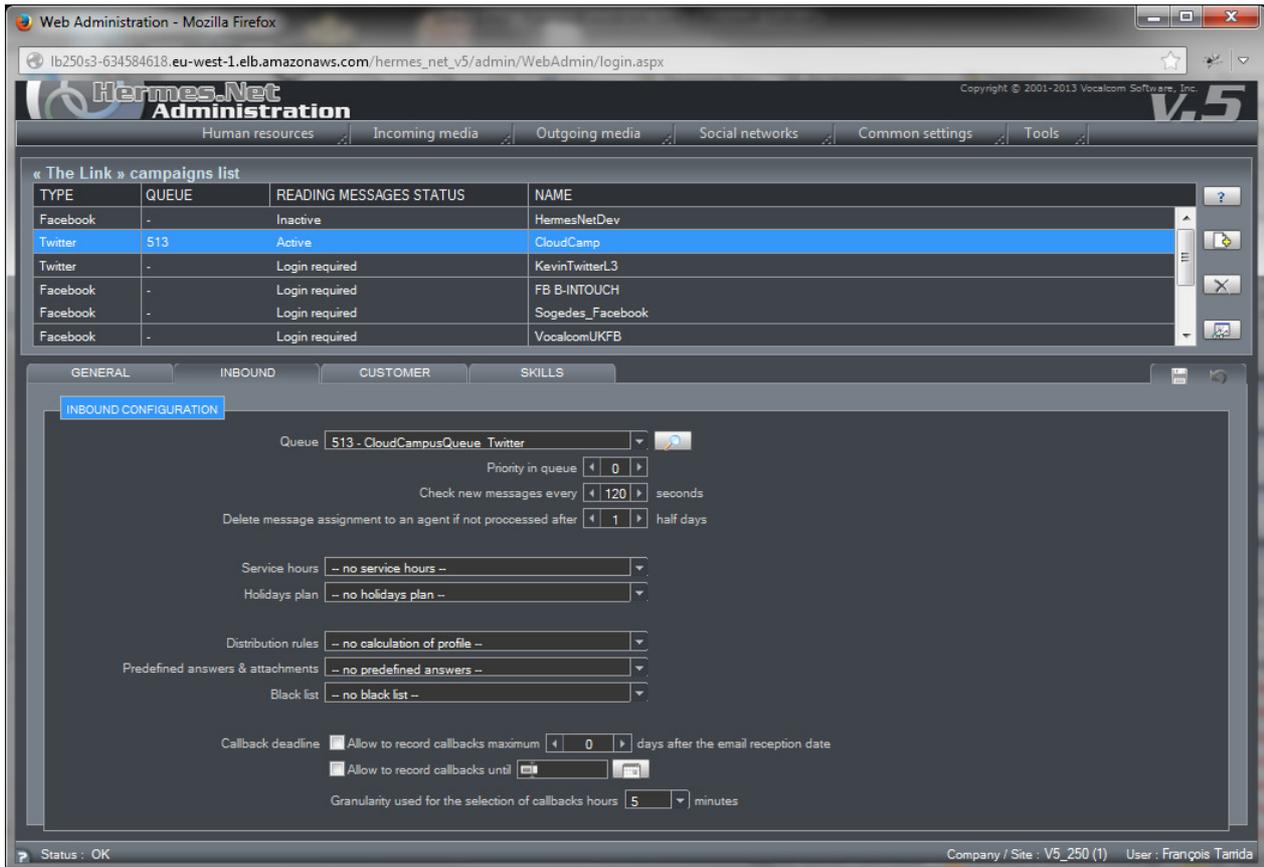
On the right side of the configuration section, there are three buttons: 'Log on to enable the reading of messages', 'Show the last logged user', and 'Show managed pages list'. At the bottom of the interface, the status is 'OK' and the user is identified as 'Francois Tamida'.

- campaign title
- platform publication (as declared at the ROOT level)
- Twitter app config:
  - **API key**
  - **secret key**
  - **Access token**
  - **Canvas page**
  - **Canvas URL**
  - **Page to display after acceptance**



In the **"Inbound"** tab, you can now setup:

**Twitter campaign:**



The screenshot shows the 'Hermes.Net Administration' interface. At the top, there's a navigation menu with options like 'Human resources', 'Incoming media', 'Outgoing media', 'Social networks', 'Common settings', and 'Tools'. Below this is a table titled '« The Link » campaigns list'.

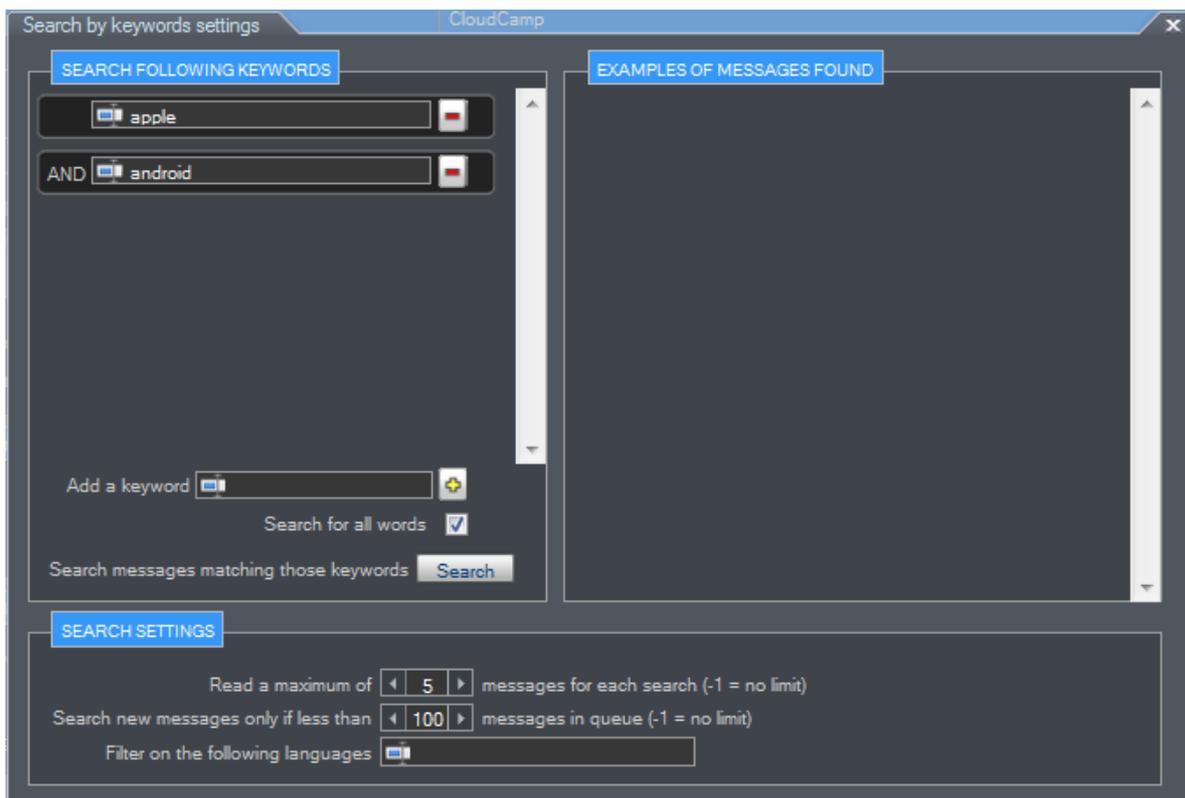
| TYPE     | QUEUE | READING MESSAGES STATUS | NAME             |
|----------|-------|-------------------------|------------------|
| Facebook | -     | Inactive                | HermesNetDev     |
| Twitter  | 513   | Active                  | CloudCamp        |
| Twitter  | -     | Login required          | KevinTwitterL3   |
| Facebook | -     | Login required          | FB B-INTOUCH     |
| Facebook | -     | Login required          | Sogedes_Facebook |
| Facebook | -     | Login required          | VocalcomUKFB     |

Below the table is the 'INBOUND CONFIGURATION' panel for the selected 'CloudCamp' campaign. It includes settings for:
 

- Queue: 513 - CloudCampQueue - Twitter
- Priority in queue: 0
- Check new messages every: 120 seconds
- Delete message assignment to an agent if not processed after: 1 half days
- Service hours: -- no service hours --
- Holidays plan: -- no holidays plan --
- Distribution rules: -- no calculation of profile --
- Predefined answers & attachments: -- no predefined answers --
- Black list: -- no black list --
- Callback deadline:  Allow to record callbacks maximum 0 days after the email reception date
- Allow to record callbacks until [ ] minutes
- Granularity used for the selection of callbacks hours: 5 minutes

-the queue:

- priority in the queue
- new messages rule
- deletion of message assignments rule
- hotkeys:



The screenshot shows the 'Search by keywords settings' dialog box for the 'CloudCamp' campaign. It is divided into two main sections: 'SEARCH FOLLOWING KEYWORDS' and 'SEARCH SETTINGS'.

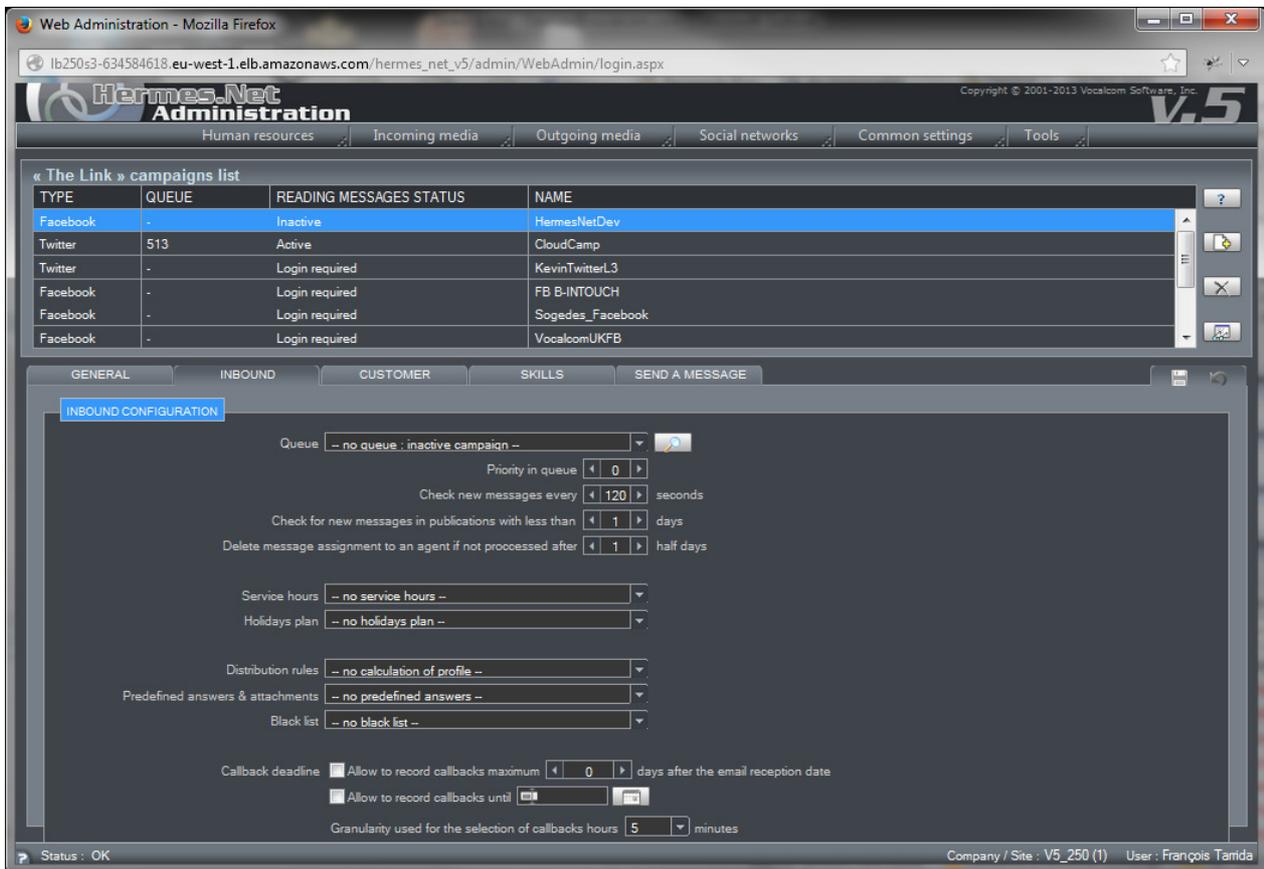
**SEARCH FOLLOWING KEYWORDS:** This section contains two input fields for keywords. The first field contains 'apple' and the second field contains 'android', with 'AND' between them. There are 'Add a keyword' and 'Search for all words' options. A 'Search' button is located at the bottom of this section.

**SEARCH SETTINGS:** This section contains three settings:
 

- Read a maximum of 5 messages for each search (-1 = no limit)
- Search new messages only if less than 100 messages in queue (-1 = no limit)
- Filter on the following languages [ ]

- service hours & bank holidays
- distribution rules
- predefined answers
- black lists
- callback deadlines

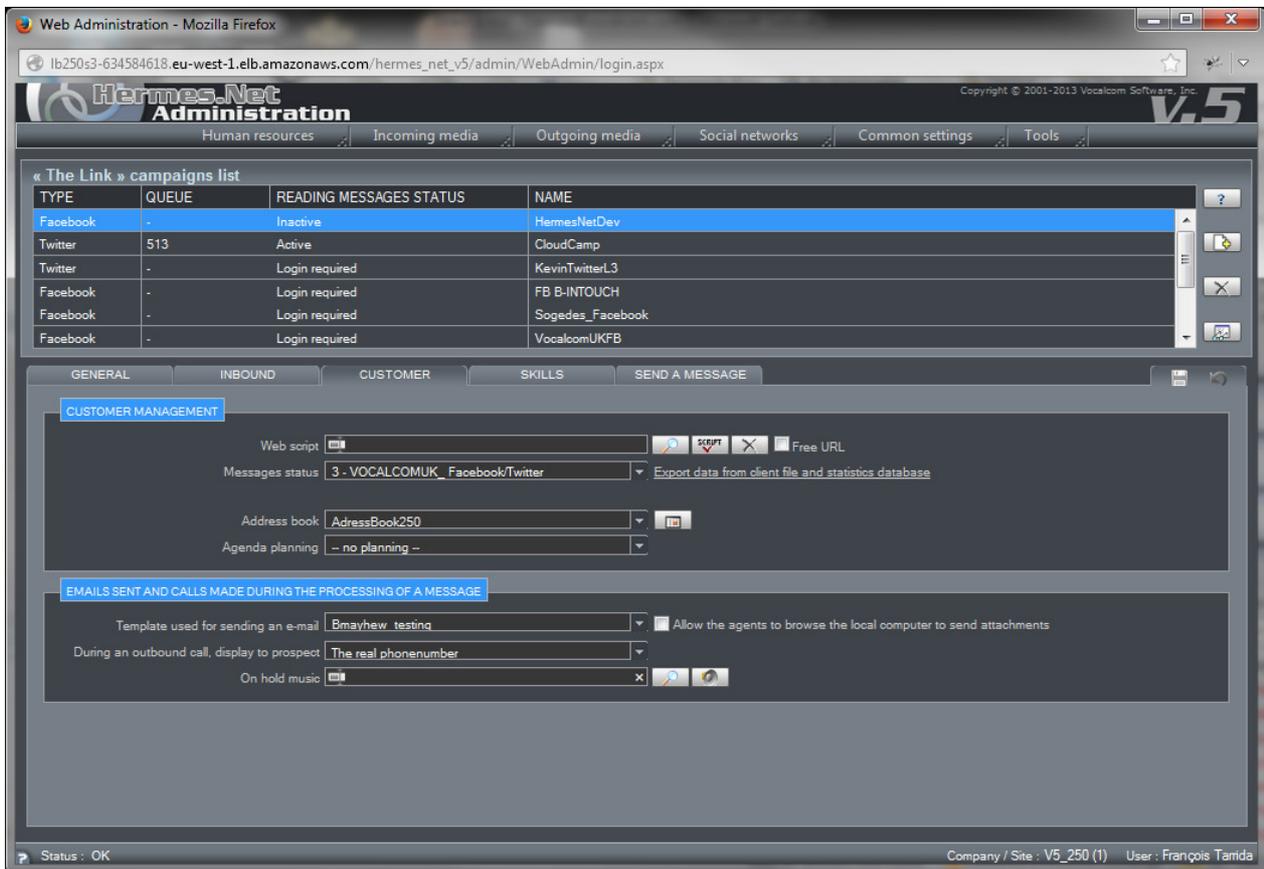
**Facebook campaign:**



- the queue :
  - priority in queue
  - new messages rule
  - deletion of message assignments rule
  - new message checking rules
- service hours & bank holidays
- distribution rules
- predefined answers
- black lists
- callback deadlines

In the **"Customer"** tab, you can now select:

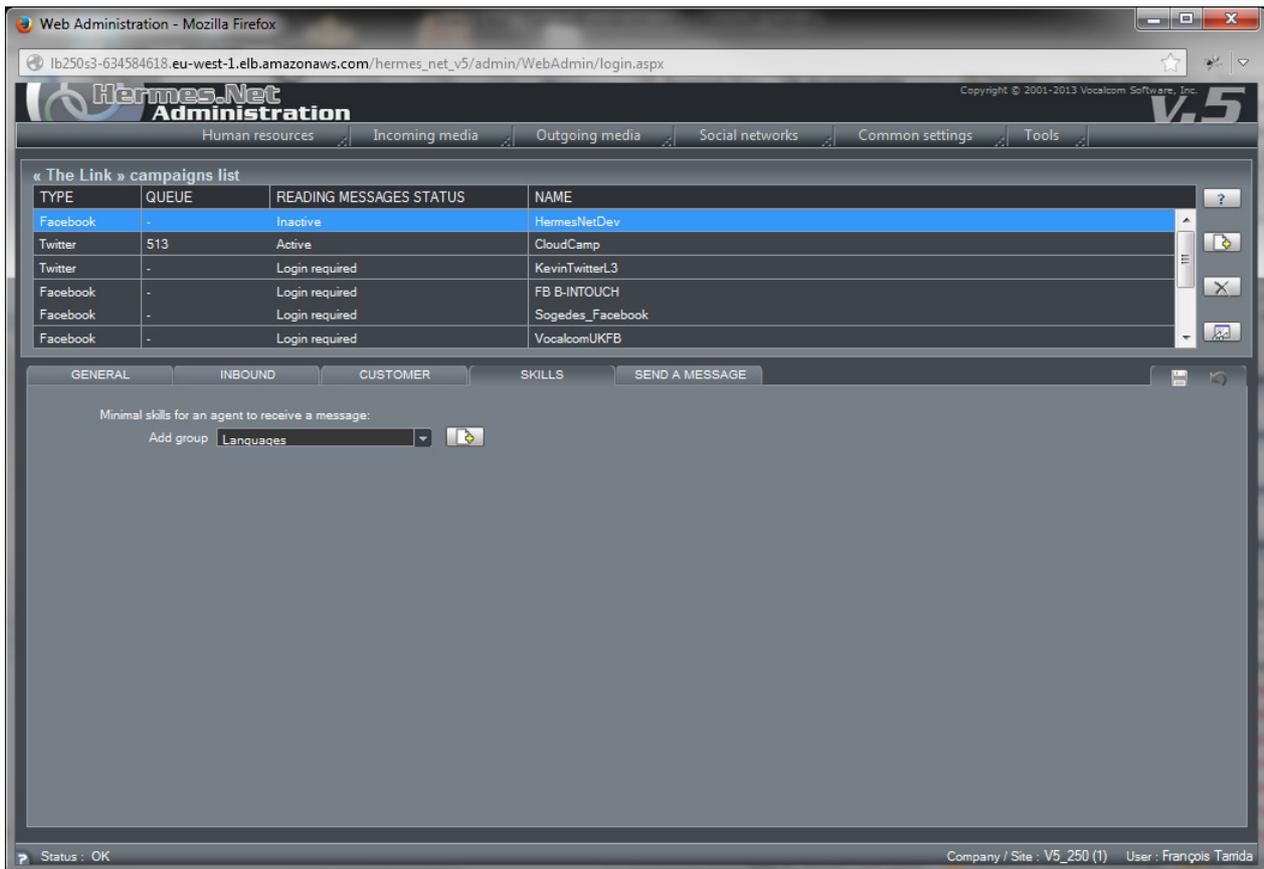
**Common to both:**



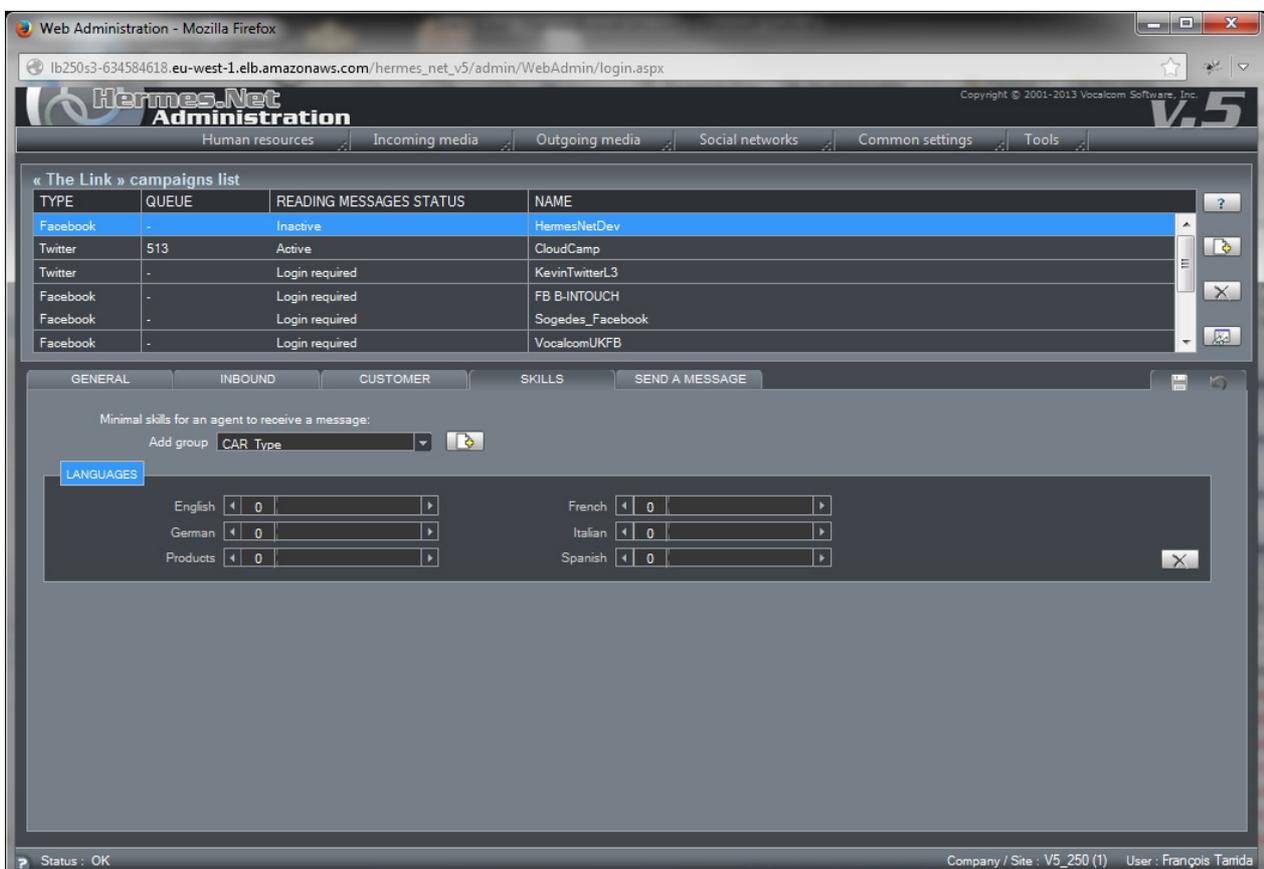
- Agent script.
- Qualifications
- Address book & agenda
- Other actions:
  - email templates
  - number to display to prospect
  - on hold music

In the **"Skills"** tab, you can now select:

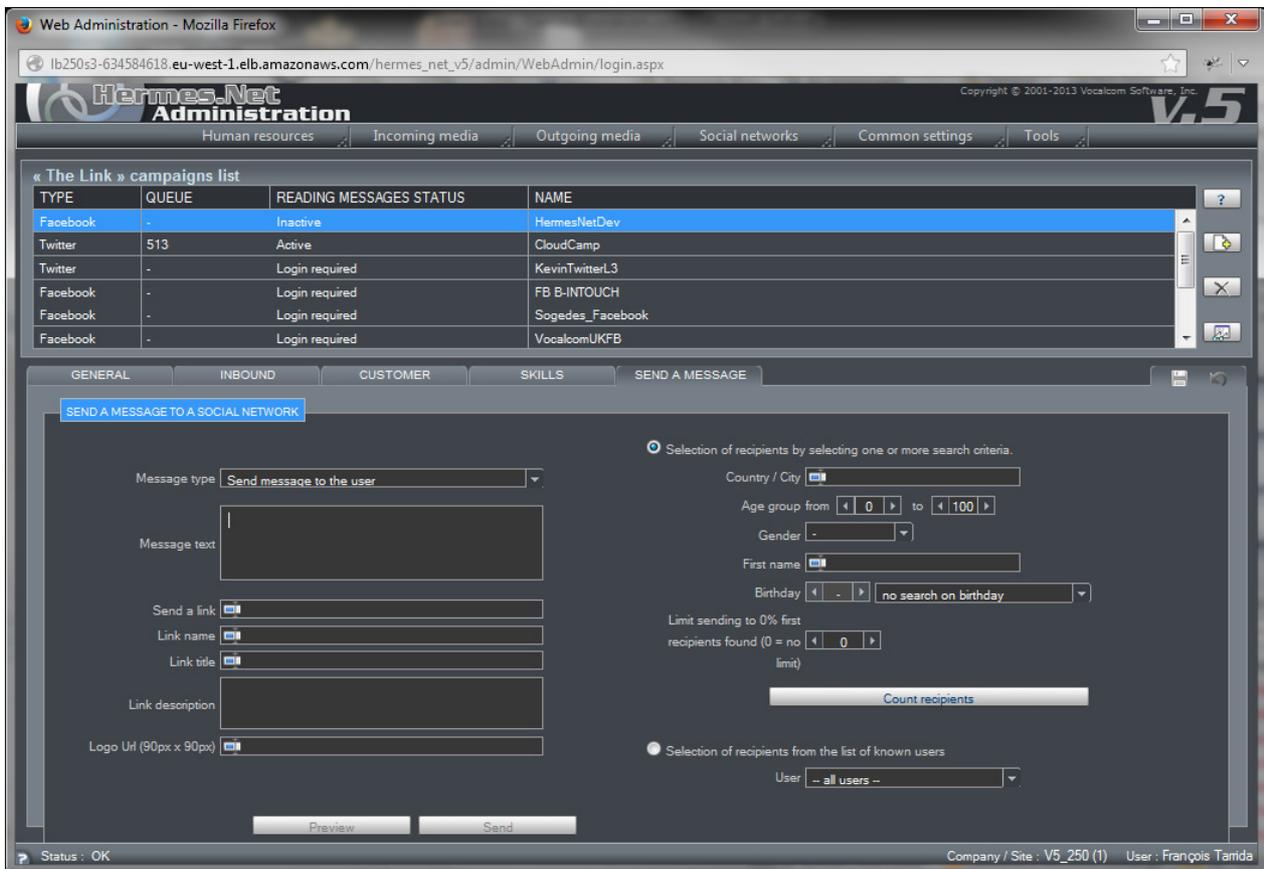
**Common to both:**



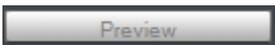
-minimum **skill level** required to work on the campaign. Click on  to add the skills group wanted:



The Facebook campaign adds an extra tab compared to Twitter, the **"Send a message"** tab, which allows the sending of messages to Facebook friends. In the **"Send a message"** tab, you can now select:



- Message type.
- Message text
- Links & logos
- Selection of recipients' criteria.

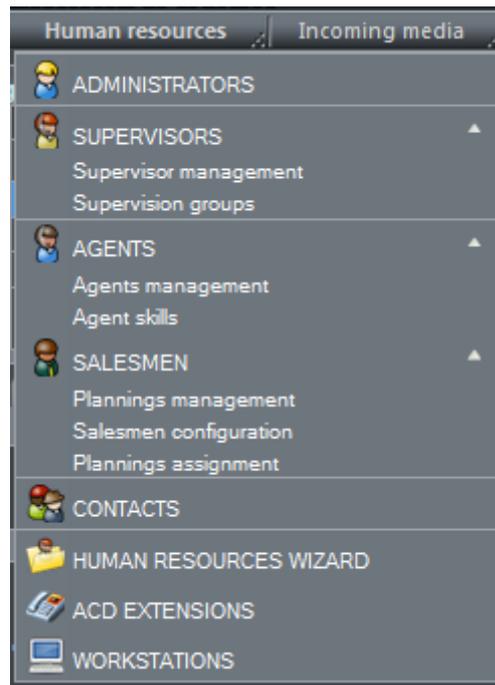
Button  allows the preview of created message, button  sends it.

## 8- Creating or assigning agent accounts

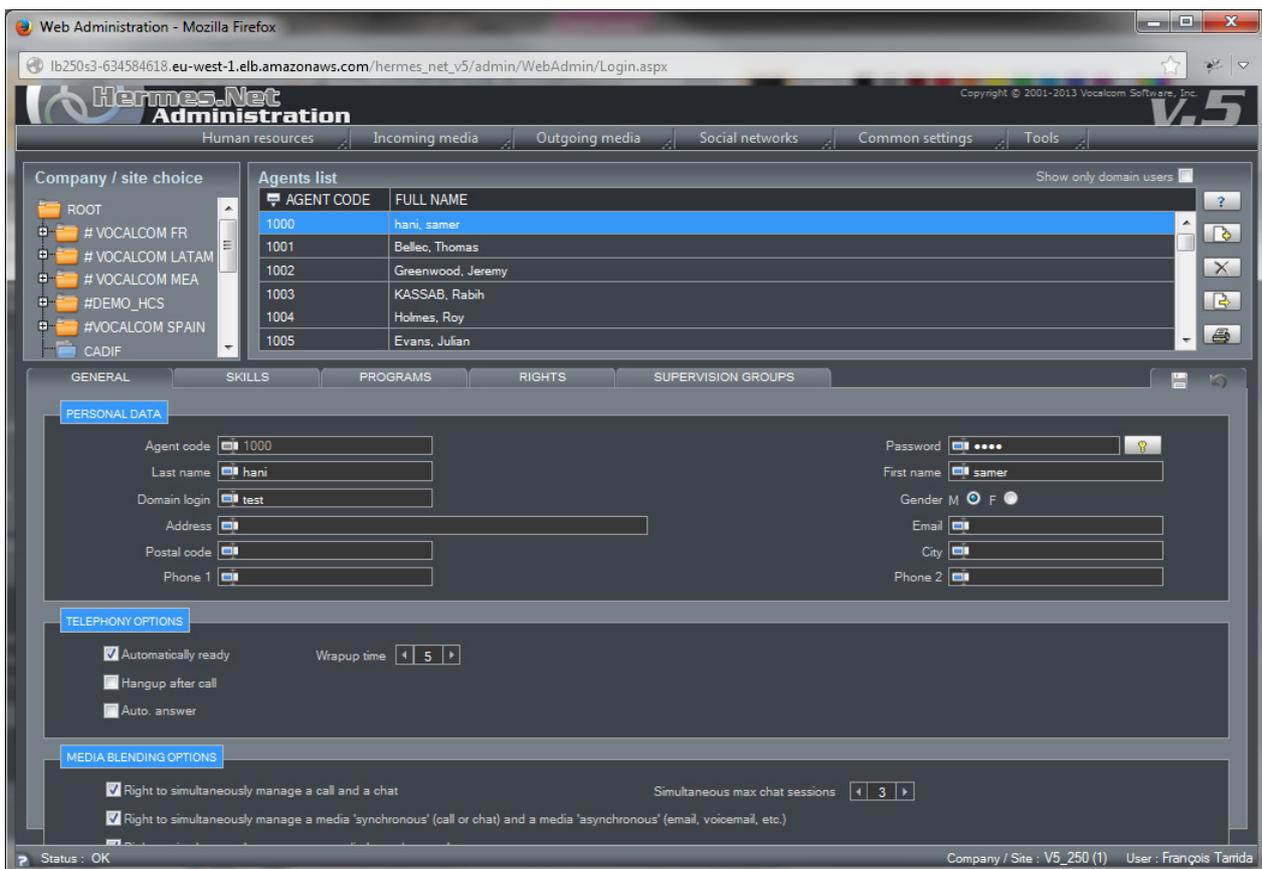
Obviously, if you don't have existing agent's accounts, you now have to create some in order to assign them to your campaign. Click on **"Human resources"**, then under **"Users"** select **"Agents"**.



**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 .

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 create 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

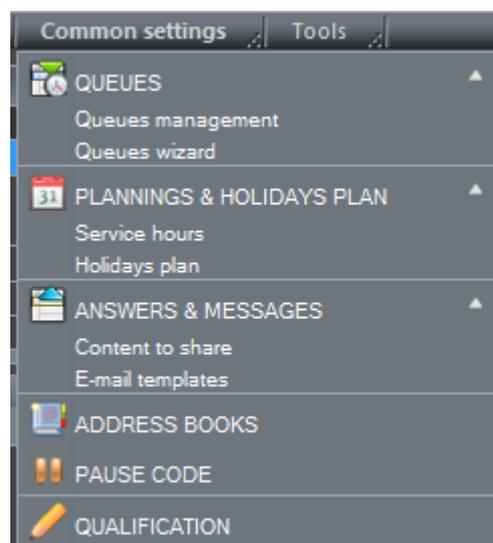
In order to create a supervisor, you just need to, when creating an agent account, give him supervision and reporting (optional) rights. This account will be automatically bumped to supervisor level, and the user will have access to the Supervision and Reporting modules.

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

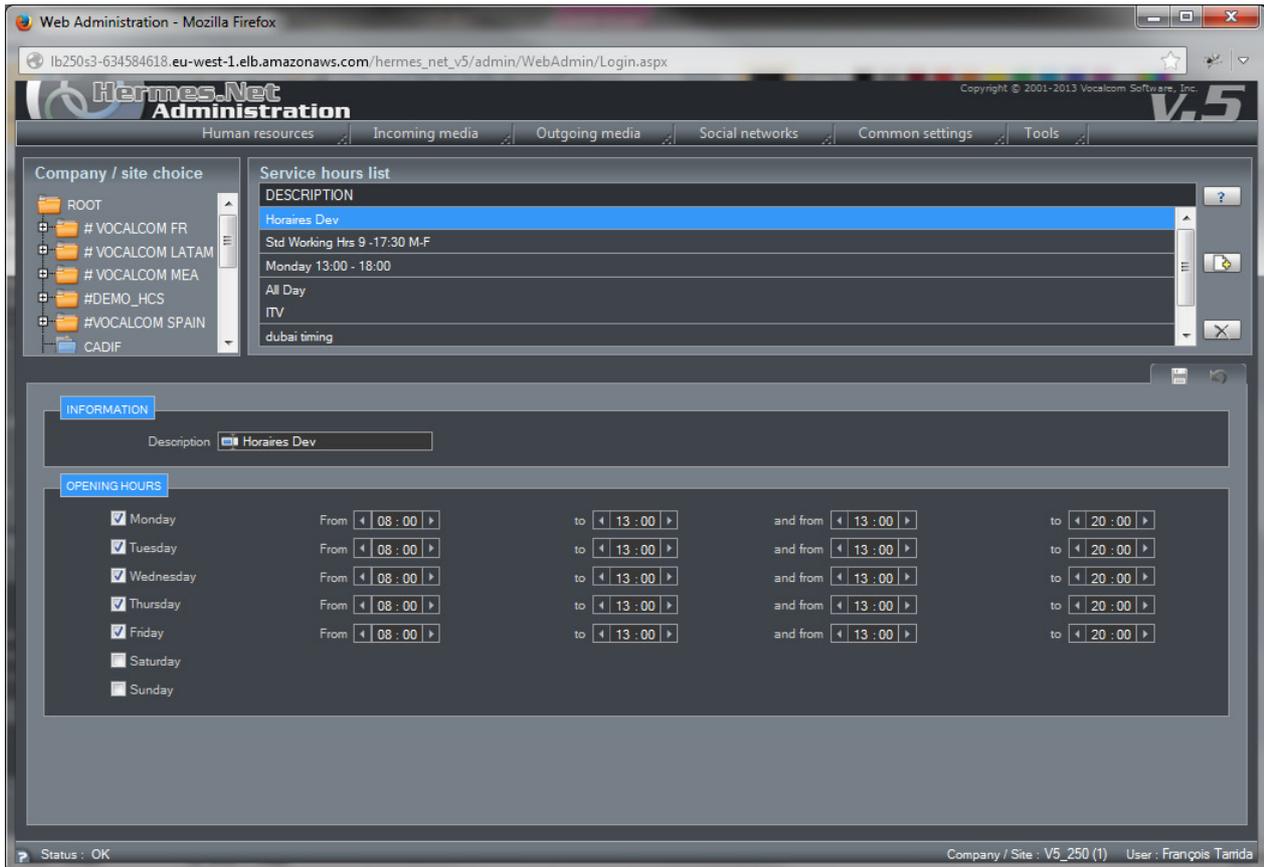
Your campaign will need Service Hours.

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



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

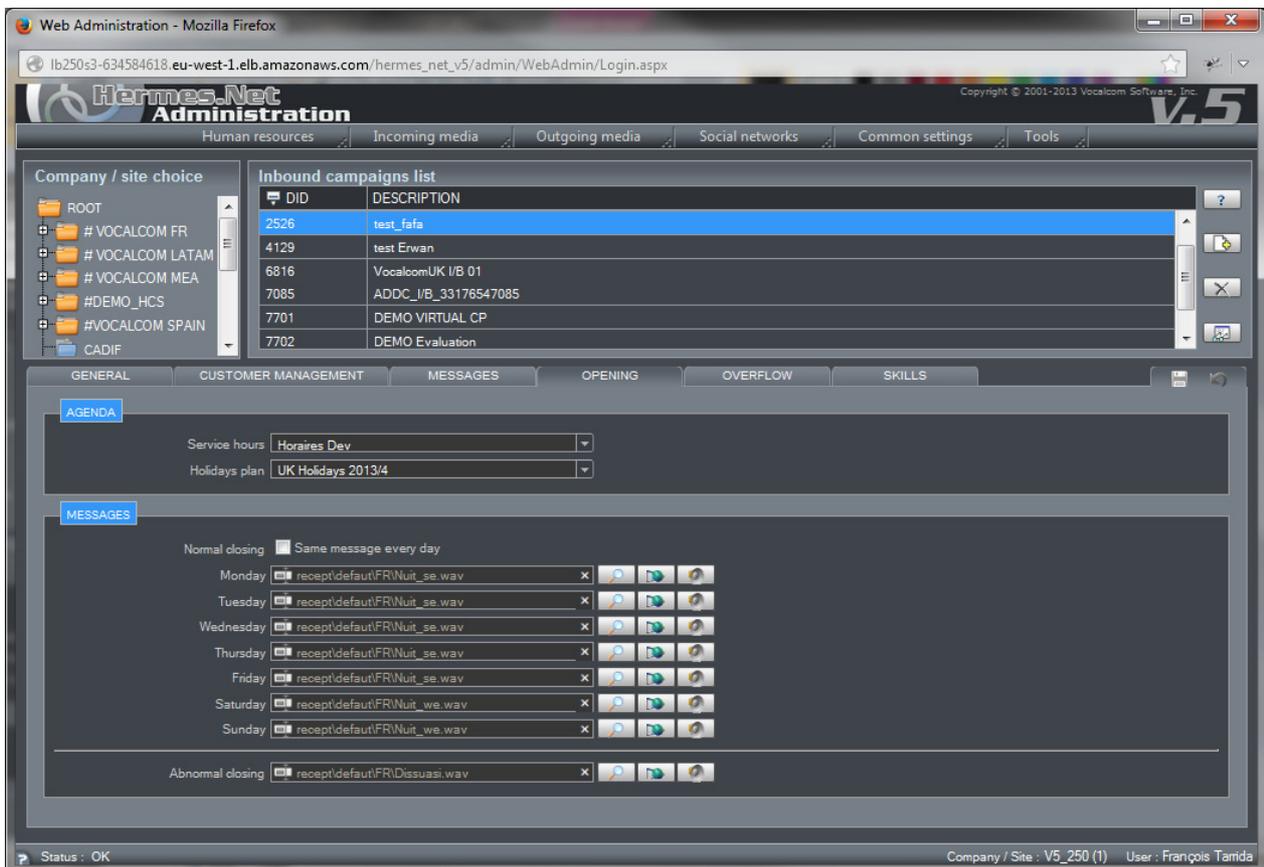
In your planning, choose the days and hours of activity. If you don't have breaks in the activity during the day, just fill the first two hours of activity on the left, and put 00:00 in the next two, as in the example below:



The screenshot shows the 'Service hours list' configuration page in the Hermes.Net Administration interface. The page is titled 'Service hours list' and has a 'DESCRIPTION' section with a table of service hours. The table has two columns: 'DESCRIPTION' and a set of time selection controls. The first row is 'Horaires Dev', which is highlighted in blue. Below the table, there is an 'INFORMATION' section with a 'Description' field containing 'Horaires Dev'. Below that is an 'OPENING HOURS' section with a grid of checkboxes for days of the week (Monday through Sunday) and time selection controls for each day. The status bar at the bottom indicates 'Status: OK' and 'Company / Site: V5\_250 (1) User: François Tamida'.

| DESCRIPTION                  | From  | to    | and from | to    |
|------------------------------|-------|-------|----------|-------|
| Horaires Dev                 | 08:00 | 13:00 | 13:00    | 20:00 |
| Std Working Hrs 9 -17:30 M-F | 08:00 | 13:00 | 13:00    | 20:00 |
| Monday 13:00 - 18:00         | 08:00 | 13:00 | 13:00    | 20:00 |
| All Day                      | 08:00 | 13:00 | 13:00    | 20:00 |
| ITV                          | 08:00 | 13:00 | 13:00    | 20:00 |
| dubai timing                 | 08:00 | 13:00 | 13:00    | 20:00 |

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.



The screenshot shows the 'Inbound campaigns list' configuration page in the Hermes.Net Administration interface. The page is titled 'Inbound campaigns list' and has a table of inbound campaigns. The table has two columns: 'DID' and 'DESCRIPTION'. The first row is '2526 test\_fafa', which is highlighted in blue. Below the table, there is a 'GENERAL' section with a 'Service hours' dropdown menu set to 'Horaires Dev' and a 'Holidays plan' dropdown menu set to 'UK Holidays 2013/4'. Below that is a 'MESSAGES' section with a 'Normal closing' section containing a grid of checkboxes for days of the week (Monday through Sunday) and a 'Abnormal closing' section with a checkbox for 'recept/default/FR/Dtasuasi.wav'. The status bar at the bottom indicates 'Status: OK' and 'Company / Site: V5\_250 (1) User: François Tamida'.

| DID  | DESCRIPTION         |
|------|---------------------|
| 2526 | test_fafa           |
| 4129 | test Erwan          |
| 6816 | VocalcomUK I/B 01   |
| 7085 | ADDC_IB_33176547085 |
| 7701 | DEMO VIRTUAL CP     |
| 7702 | DEMO Evaluation     |

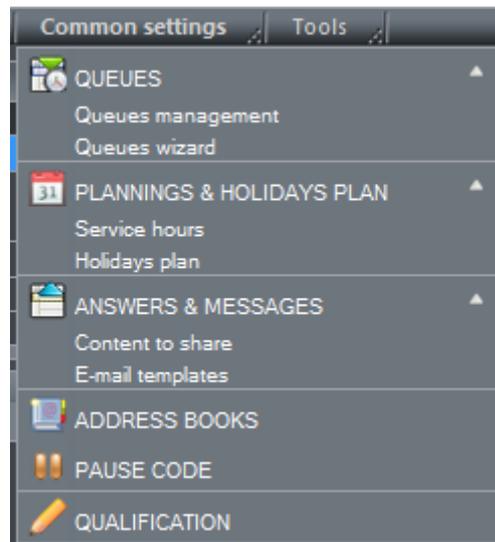


**NOTE: Service hours are optional, and without it, your campaign will work nonetheless.**

## 11- Creating or assigning Bank holidays

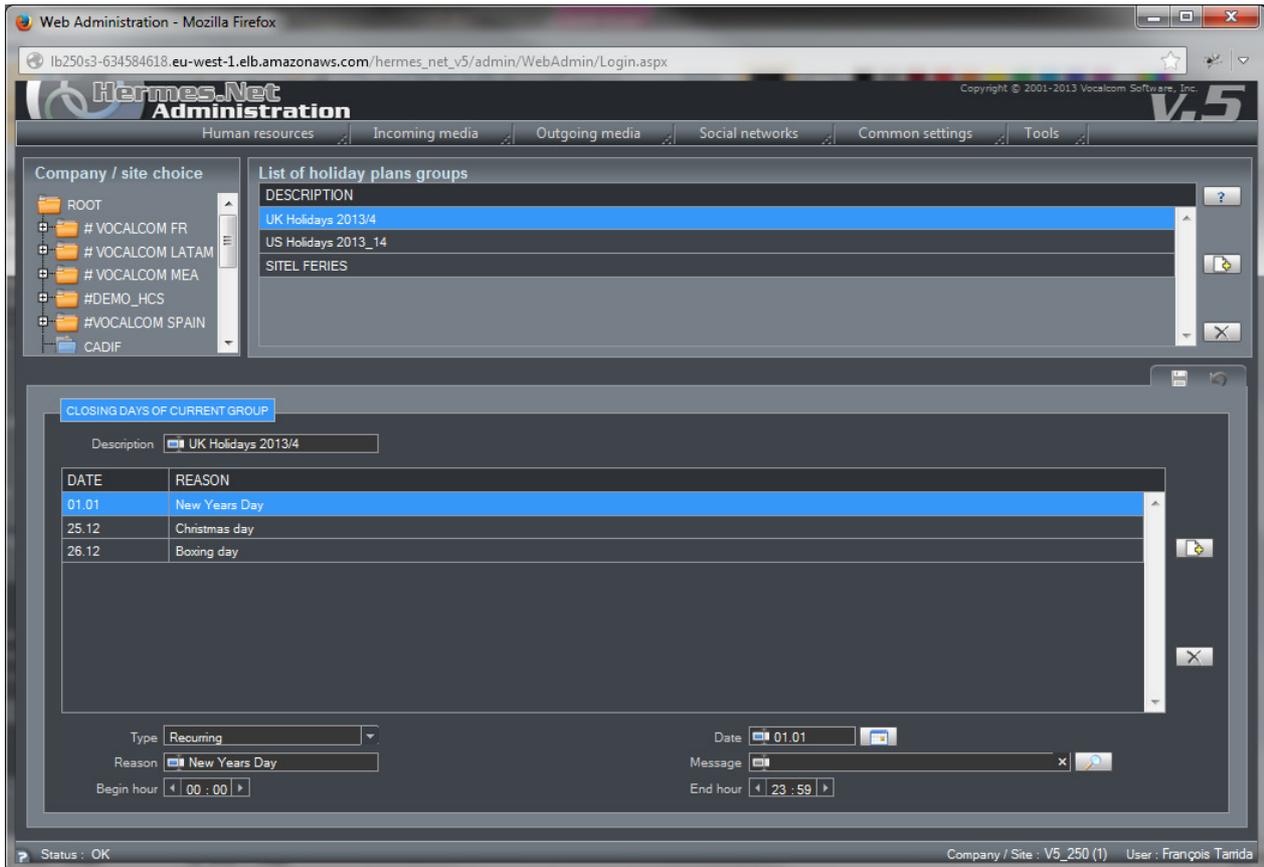
Your campaign will need a Holidays plan.

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 campaigns obviously).



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 is titled 'List of holiday plans groups' and contains a table with the following data:

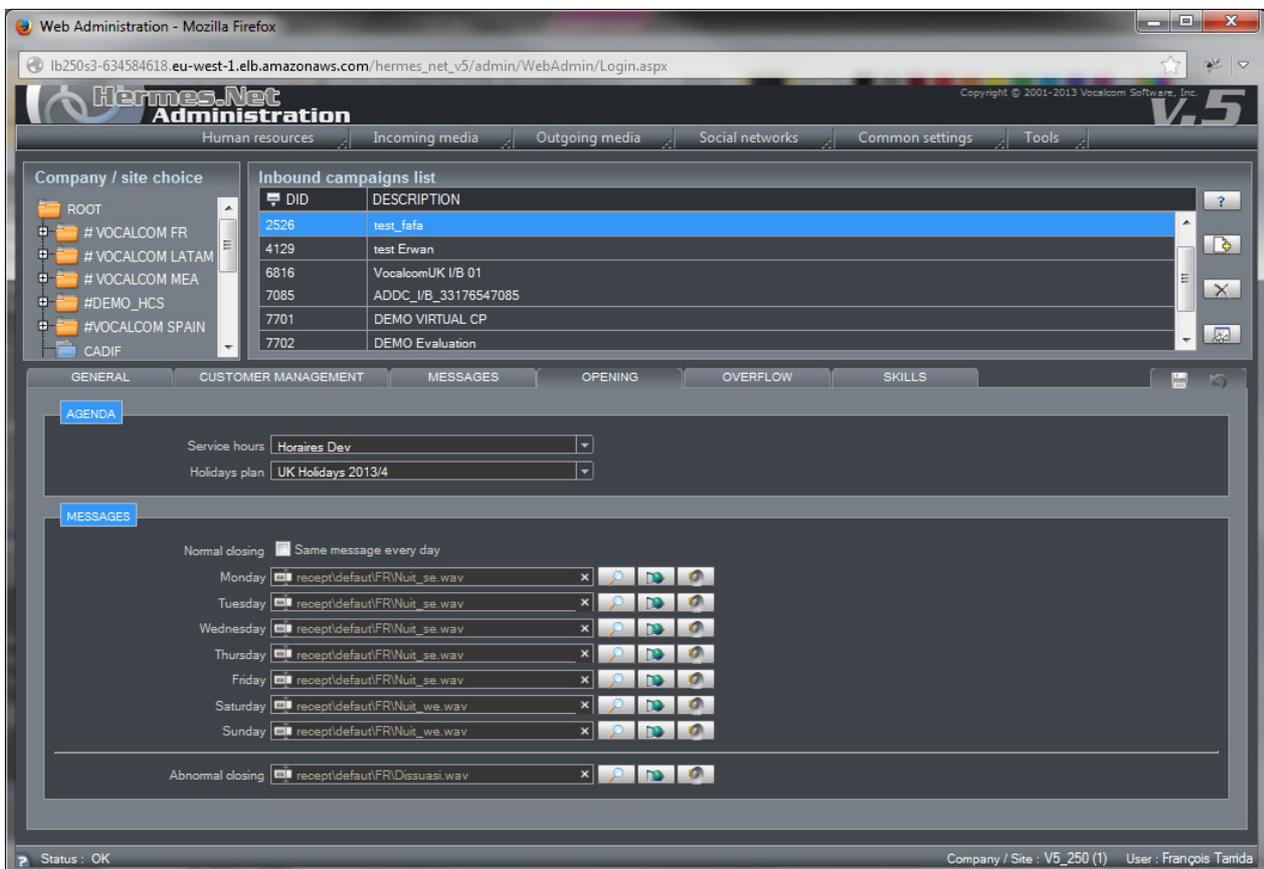
| DESCRIPTION         |
|---------------------|
| UK Holidays 2013/4  |
| US Holidays 2013_14 |
| SITEL FERIES        |

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 Tamida'.

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' 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:

| Day              | Message                       |
|------------------|-------------------------------|
| Monday           | recept/defaultFR/Nuit_se.wav  |
| Tuesday          | recept/defaultFR/Nuit_se.wav  |
| Wednesday        | recept/defaultFR/Nuit_se.wav  |
| Thursday         | recept/defaultFR/Nuit_se.wav  |
| Friday           | recept/defaultFR/Nuit_se.wav  |
| Saturday         | recept/defaultFR/Nuit_we.wav  |
| Sunday           | recept/defaultFR/Nuit_we.wav  |
| Abnormal closing | recept/defaultFR/Dissuasi.wav |

The status bar at the bottom indicates 'Status: OK' and 'Company / Site: V5\_250 (1) User: François Tamida'.

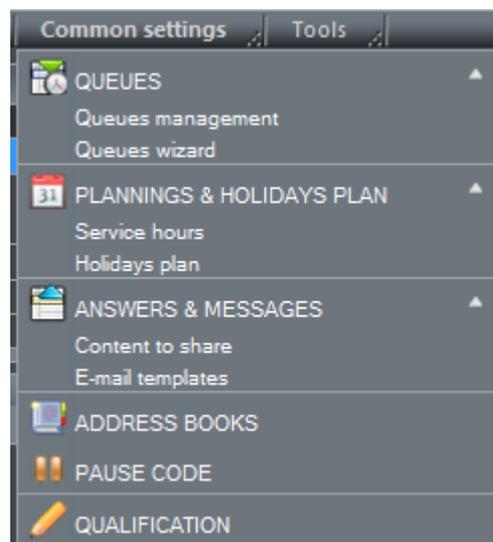


**NOTE: Holidays plan is optional, and without it, your campaign will work nonetheless.**

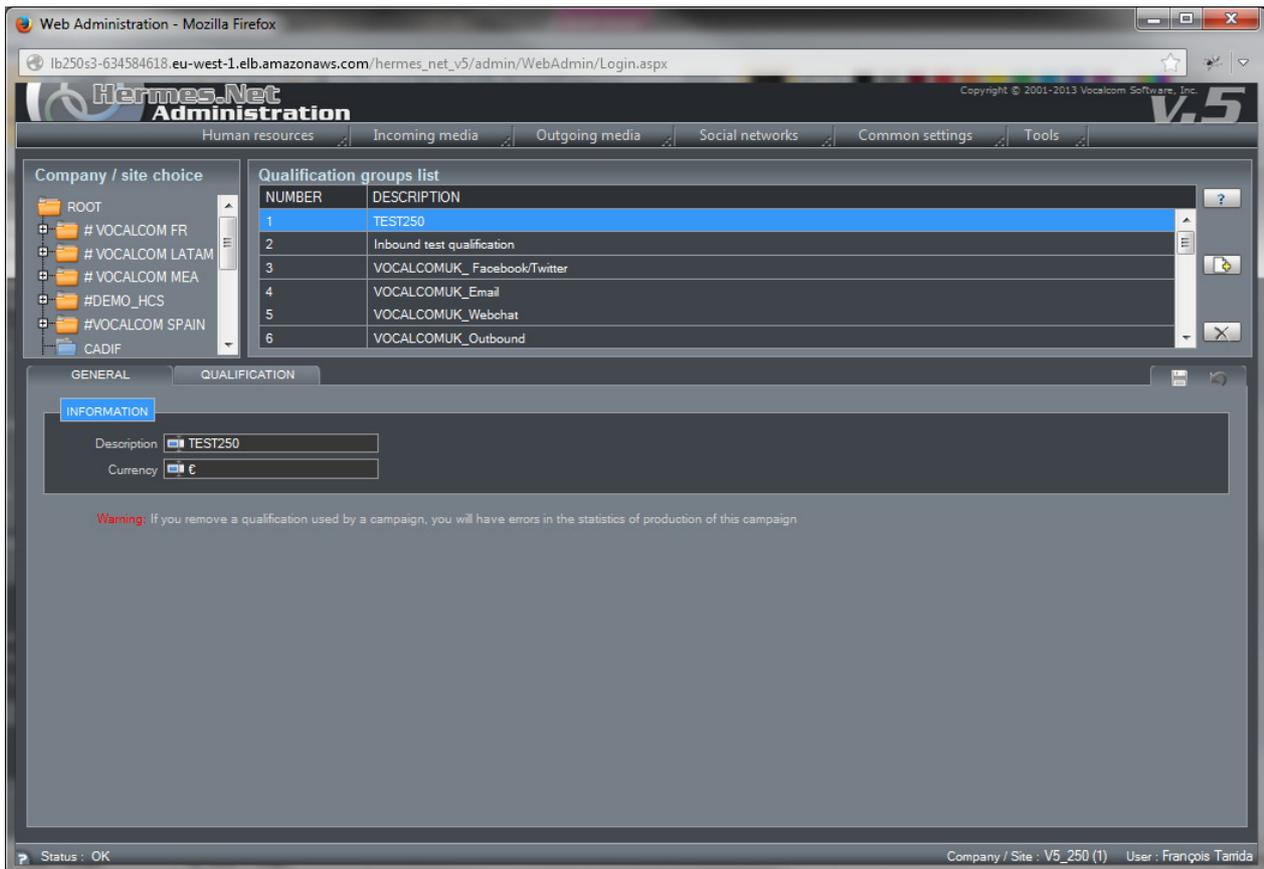
## 12- Creating or assigning qualifications

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.

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

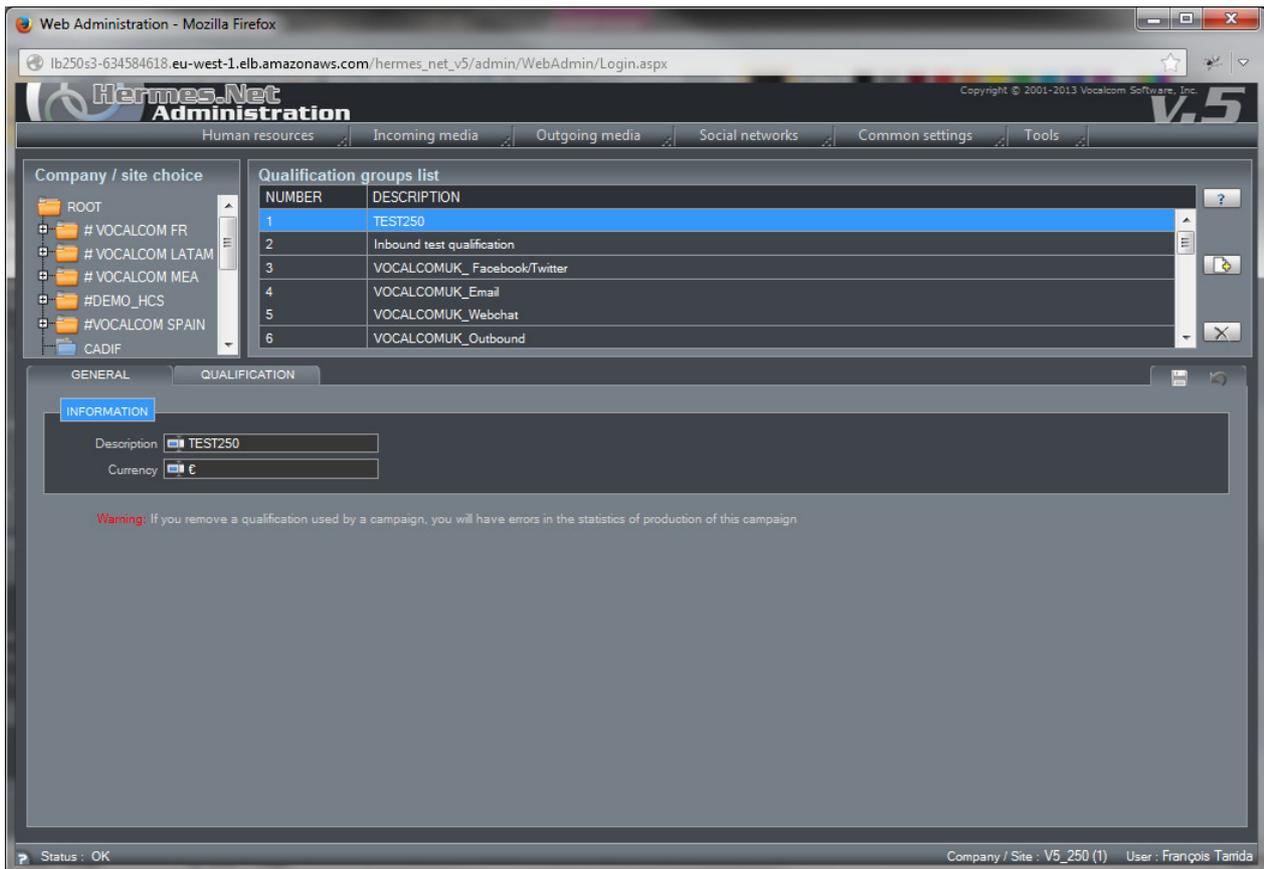


Click on **"Add"**  to create a new call qualification group.



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.

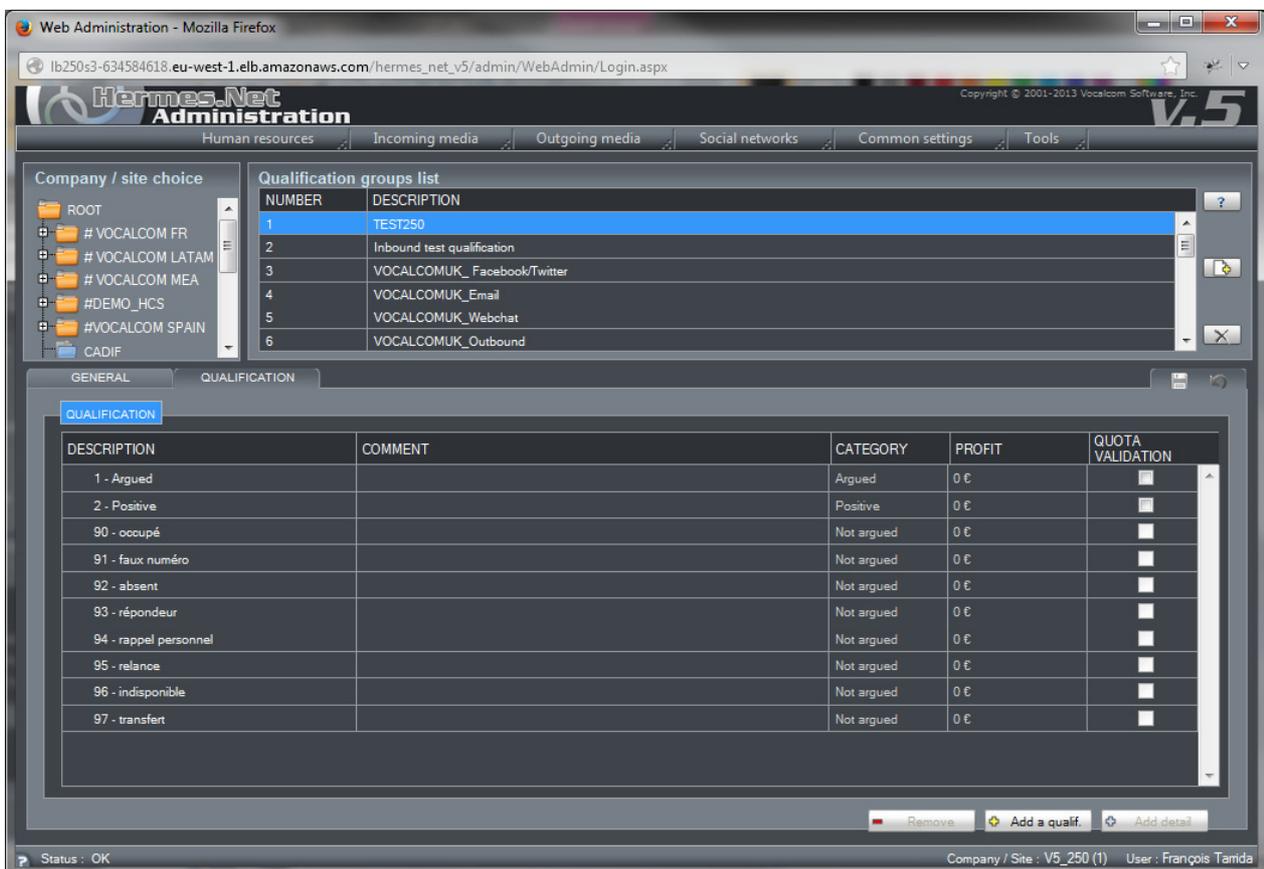


The screenshot shows the 'Hermes.Net Administration' interface. On the left, there is a 'Company / site choice' tree with folders for # VOCALCOM FR, # VOCALCOM LATAM, # VOCALCOM MEA, # DEMO\_HCS, # VOCALCOM SPAIN, and CADIF. The main area displays the 'Qualification groups list' with the following table:

| 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 'Description' set to 'TEST250' and 'Currency' 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'.

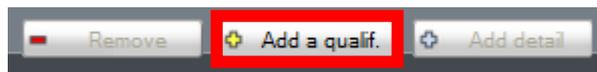
**Qualifications:** Create a new status by clicking **"Add a qualif."**. If you wish to delete it, click **"Remove"**. You can also add sub-status or details by clicking **"Add detail"**. A sub-status is useful if you wish to give more precision to the general status, for example what was sold under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



This screenshot shows the 'Qualification' details for the selected 'TEST250' group. The 'QUALIFICATION' tab is active, displaying a table of sub-qualifications:

| 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"/> |

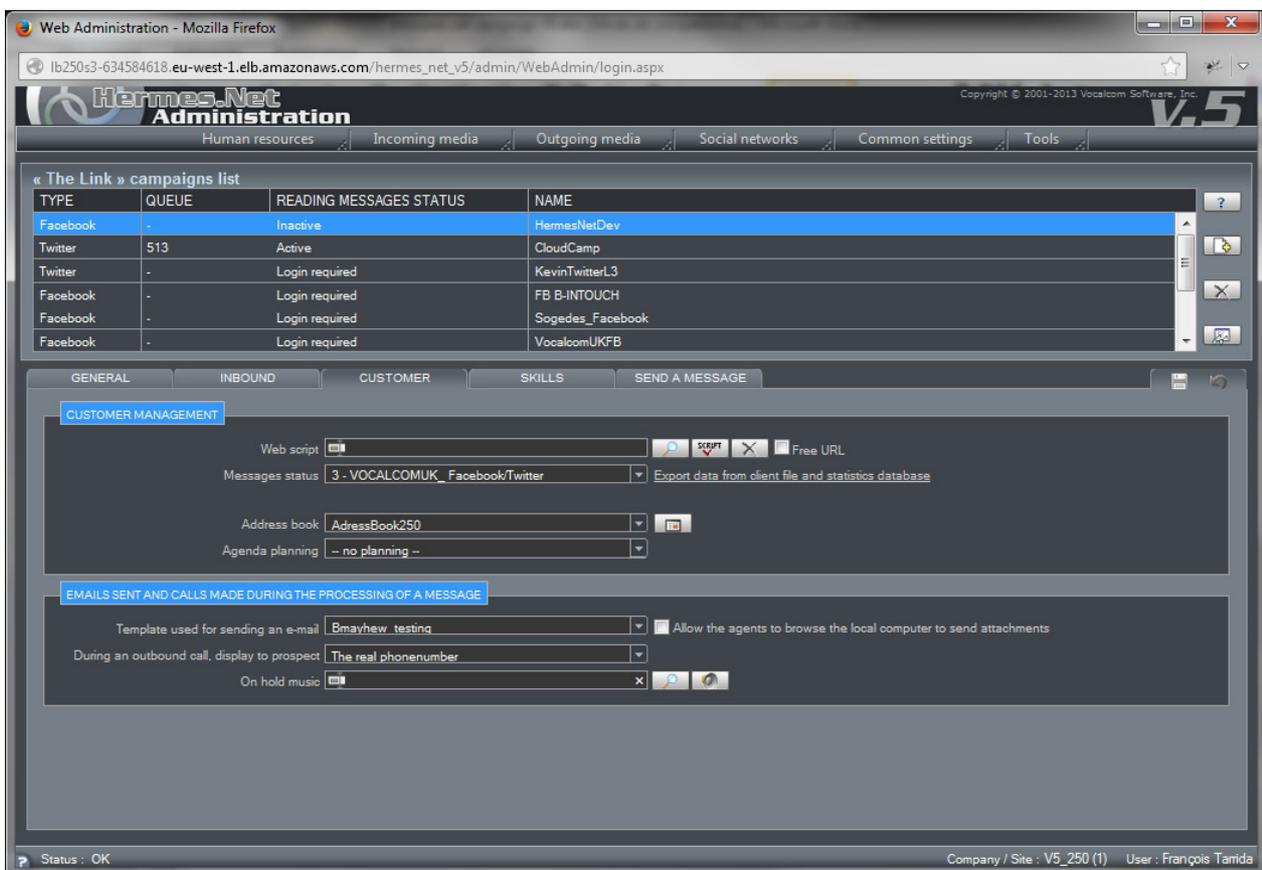
At the bottom of the interface, there are buttons for 'Remove', 'Add a qualif.', and 'Add detail'.



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.

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 dialling, 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.

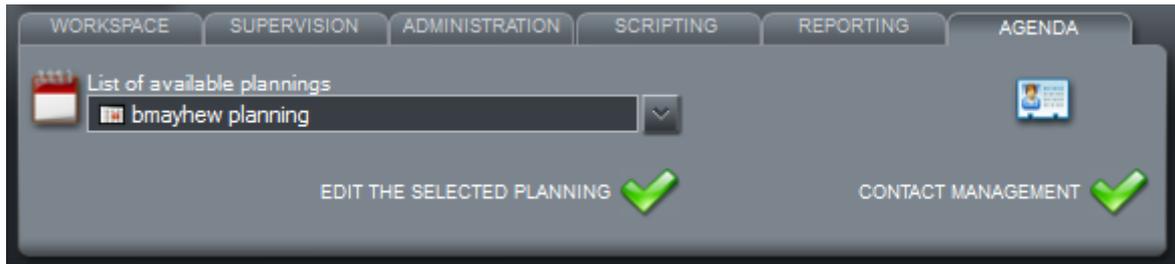


### 13- Creating your Address book

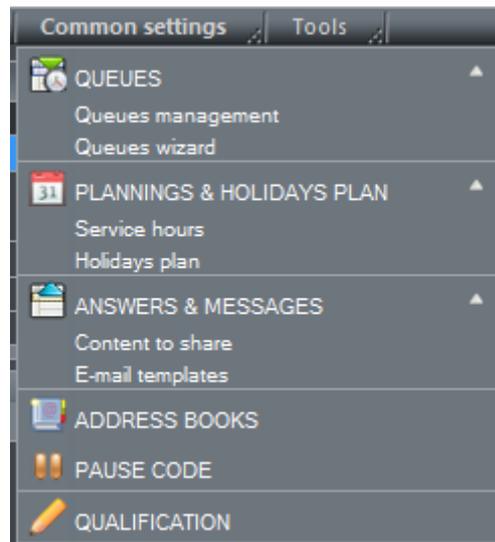
If you wish to take an appointment with the Hermes agenda module, you will need to set up an address book that contains the customer data, and a salesmen planning and salesmen accounts.



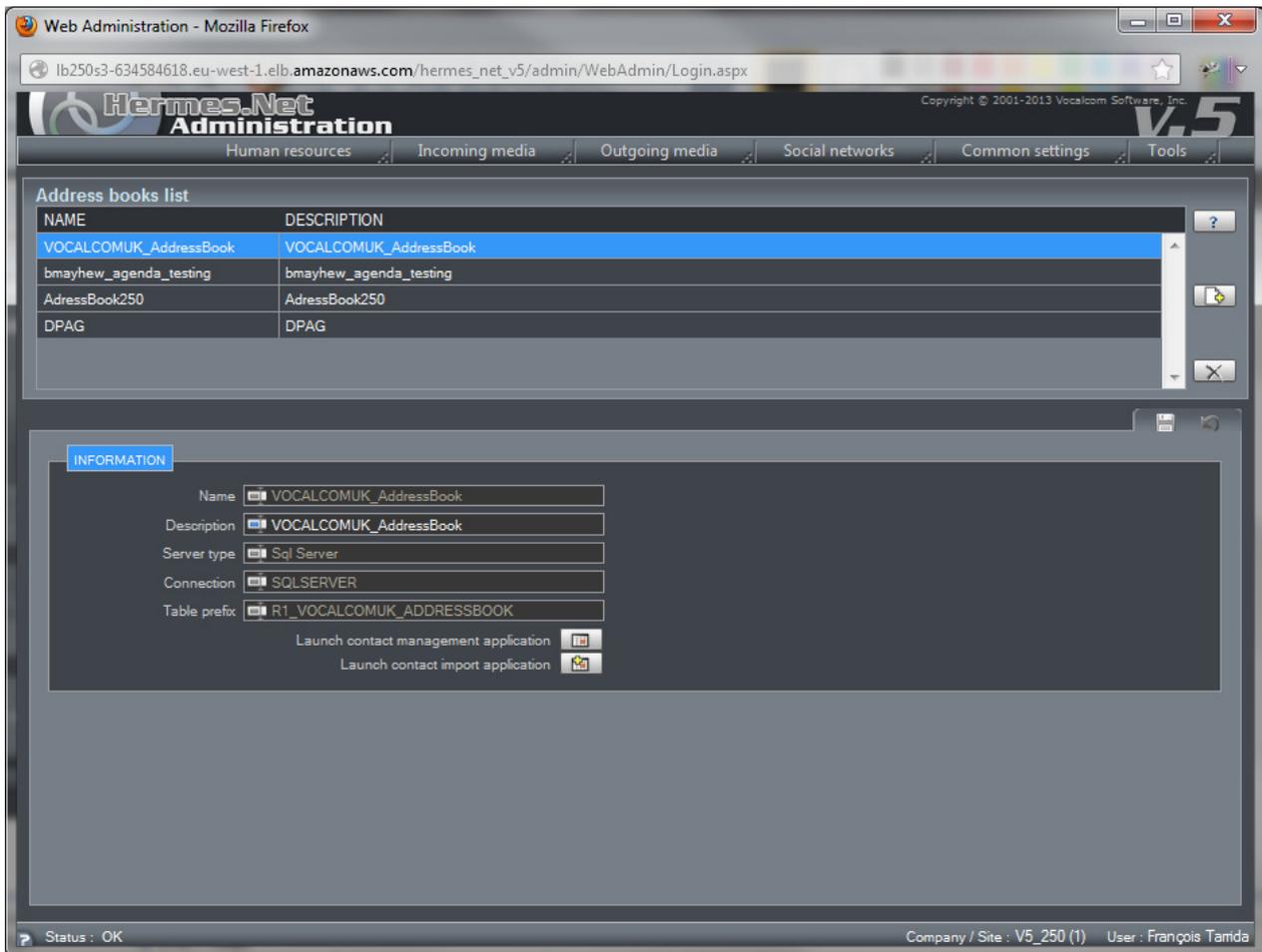
**NOTE: In V5, if you want you can, through a wizard on the home menu, create directly your plannings and CRMs.**



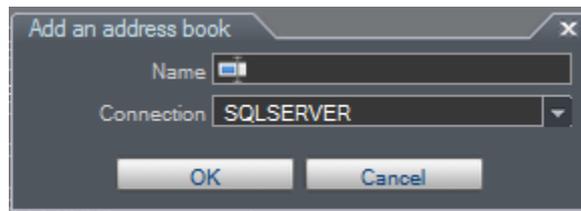
Click on **"Common settings"**, and then select **"Adress books"**.



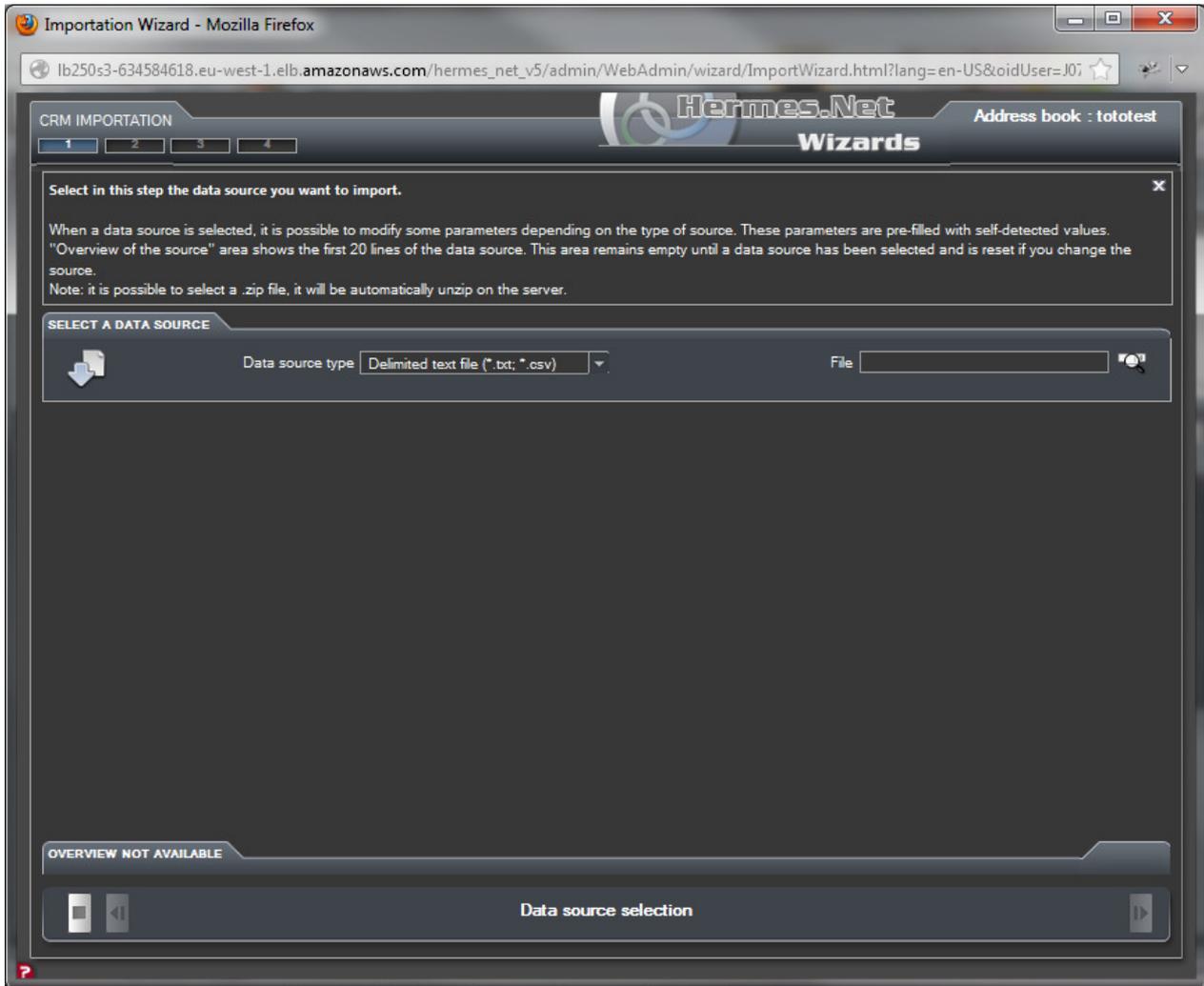
Click on **"Add"**  to create a new address book.



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 in step 6. 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

**Hermes.Net Wizards**

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

**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**

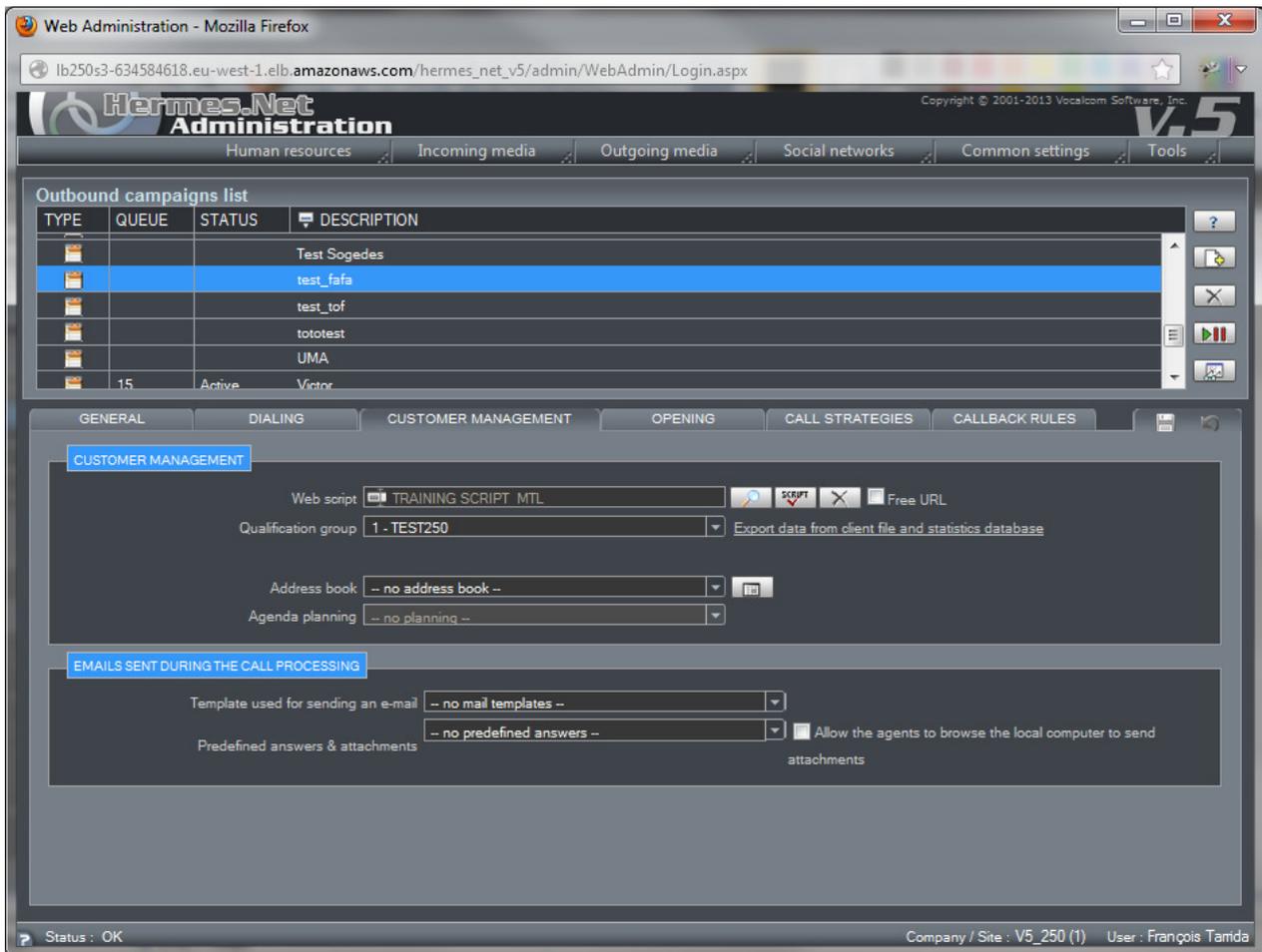
Destination : Source  
Last name : NAME  
Professional phone number : TELEPHONE

**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.



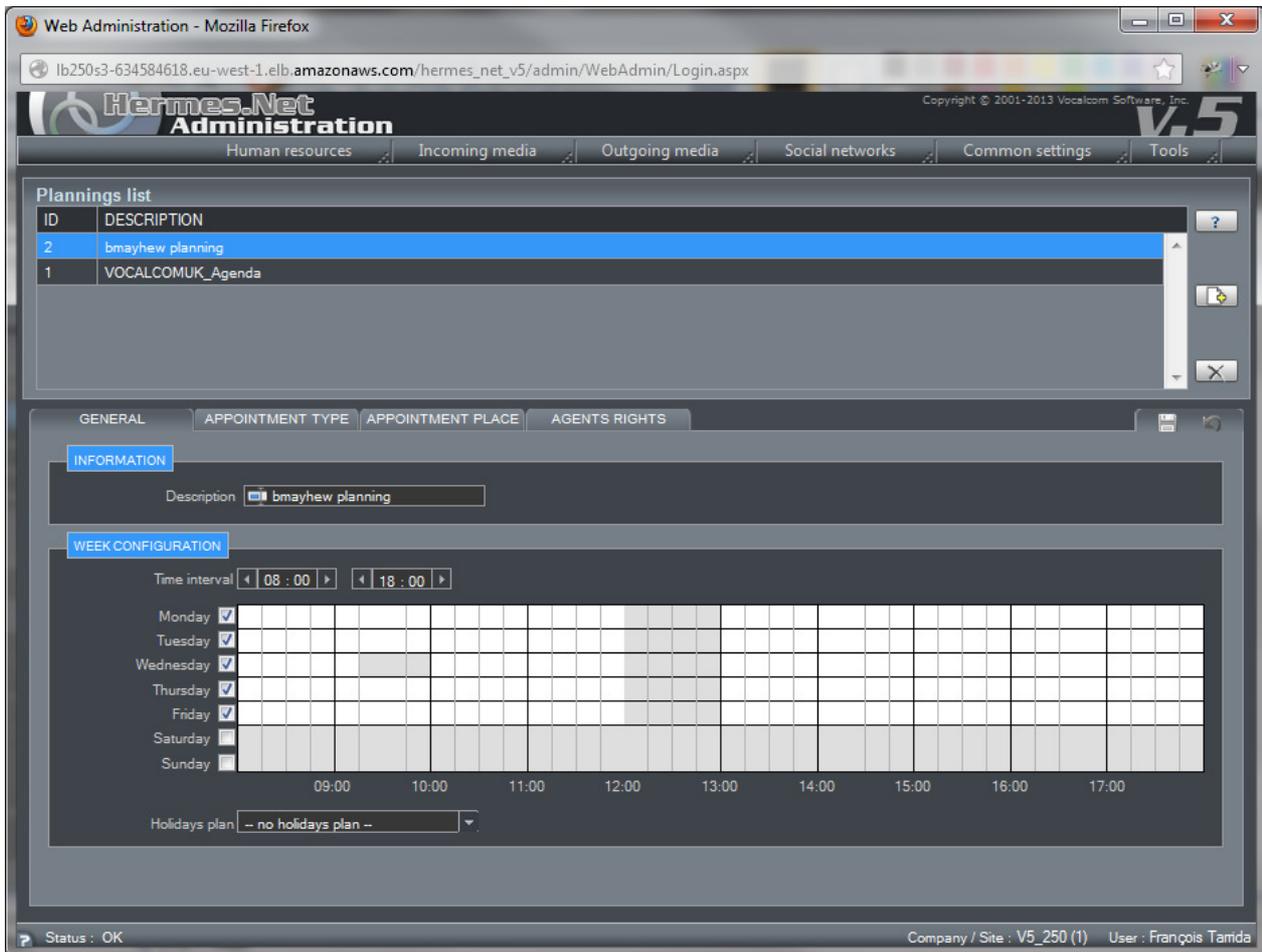
#### 14-Creating the Salesmen planning

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.



The screenshot shows the 'Hermes.Net Administration' web interface. At the top, there are navigation tabs: 'Human resources', 'Incoming media', 'Outgoing media', 'Social networks', 'Common settings', and 'Tools'. The main content area is titled 'Plannings list' and contains a table with the following data:

| ID | DESCRIPTION       |
|----|-------------------|
| 2  | bmayhew planning  |
| 1  | VOCALCOMUK_Agenda |

Below the table, there are configuration tabs: 'GENERAL', 'APPOINTMENT TYPE', 'APPOINTMENT PLACE', and 'AGENTS RIGHTS'. The 'GENERAL' tab is active, showing an 'INFORMATION' section with a 'Description' field containing 'bmayhew planning'. Below that is a 'WEEK CONFIGURATION' section with a 'Time interval' set to '08:00' to '18:00'. A grid shows the days of the week (Monday to Sunday) with checkboxes and a grid of time slots from 09:00 to 17:00. The 'Holidays plan' is set to '- no holidays plan -'. At the bottom, the status is 'OK' and the user is identified as 'François Tarrida'.

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.**

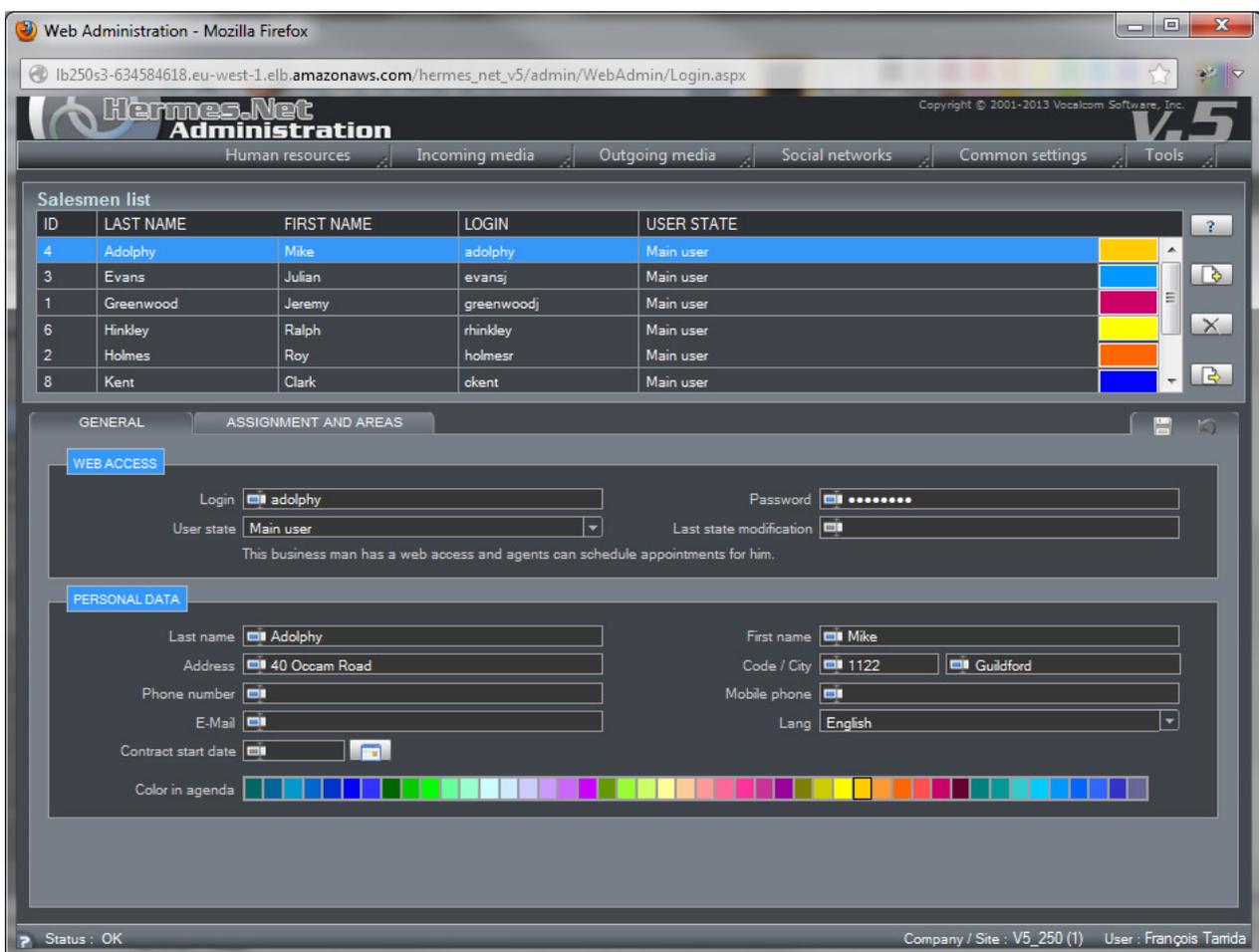
## 15-Creating the salesmen

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.

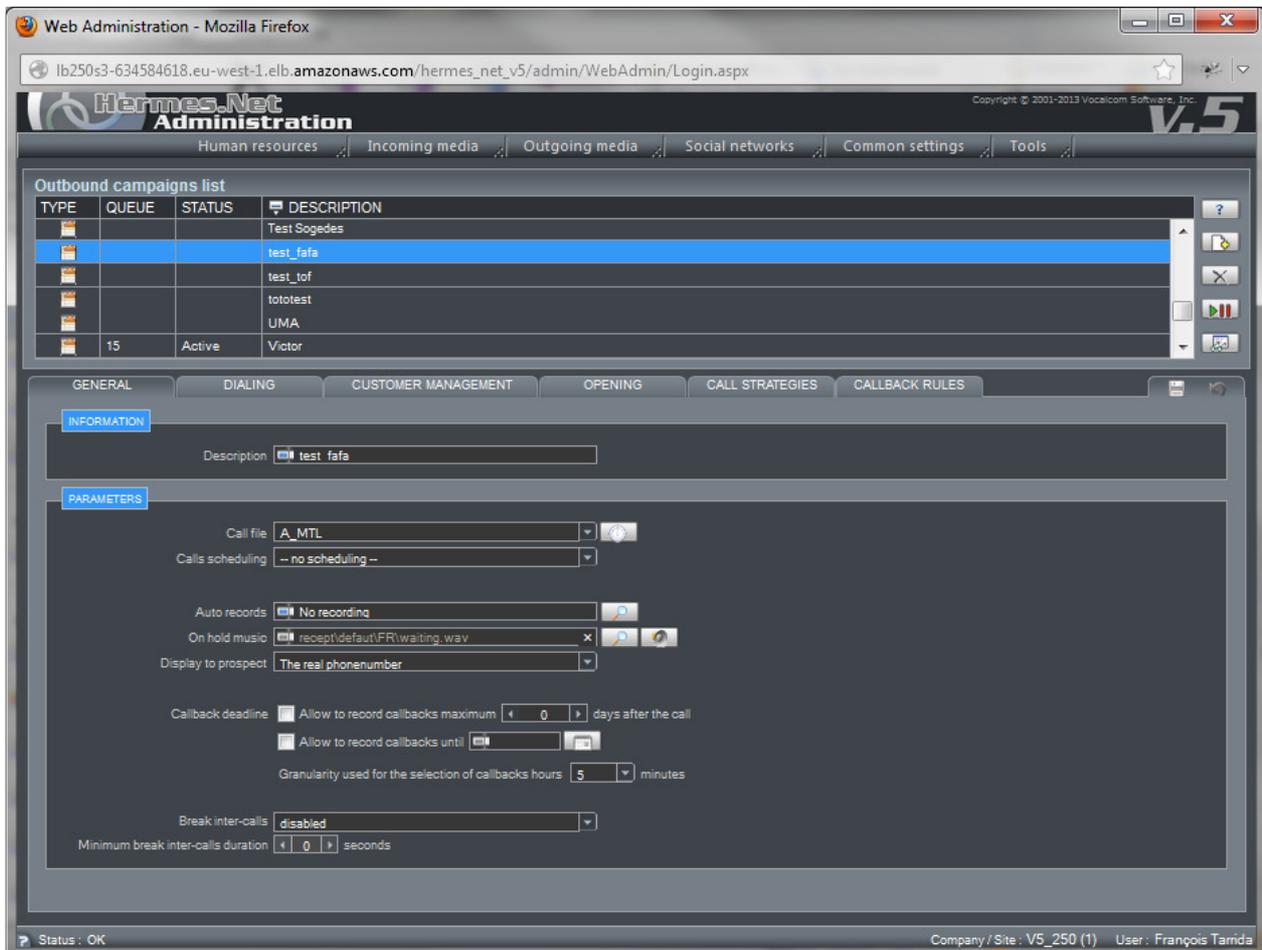


You can configure the different tabs :

**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).

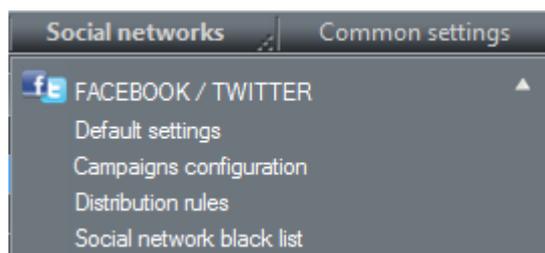
Save your address book, and go back to your campaign. Under the « **Customer management** » tab, in « **Agenda Planning** », select the planning you've just created and save.



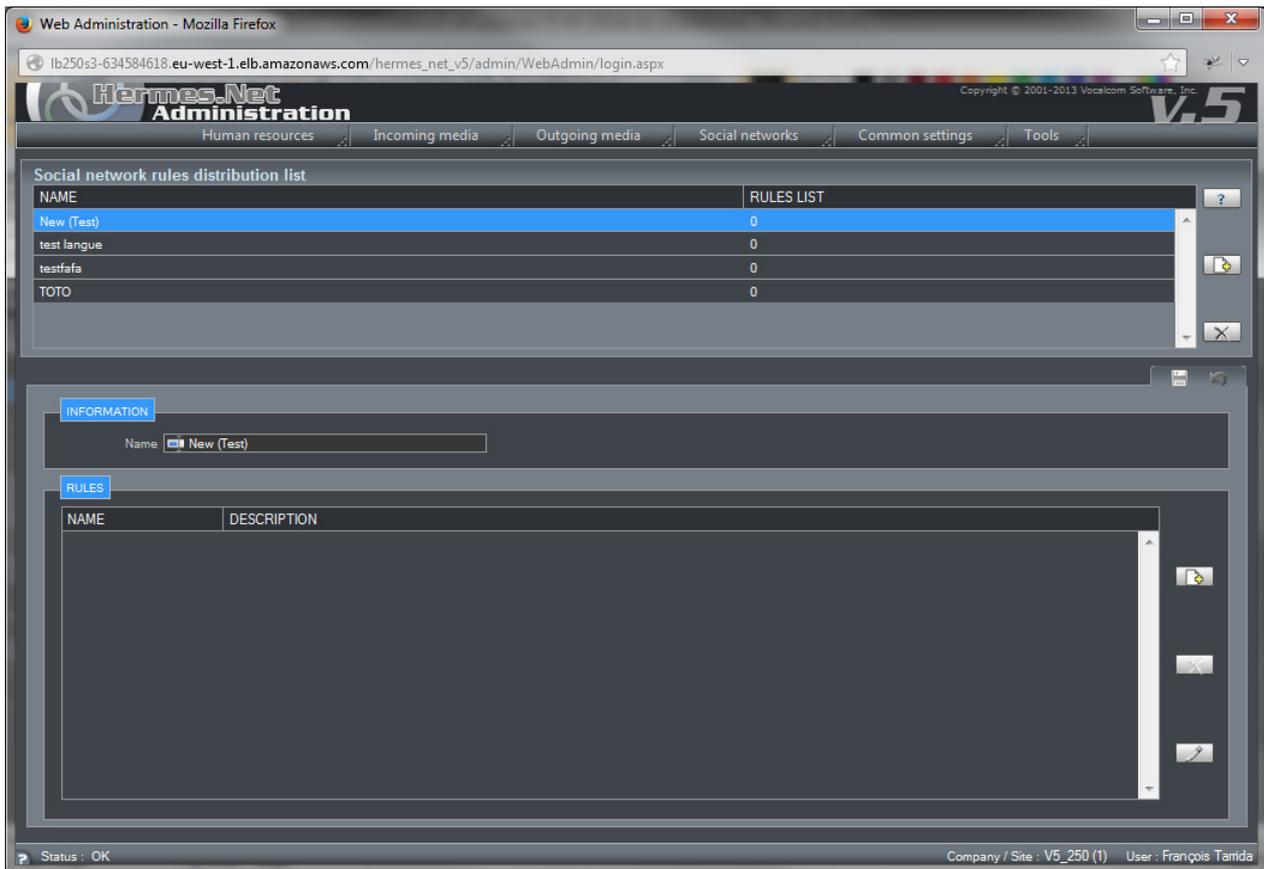
## 16- Distribution rules

Distribution rules allow you, via the use of skills, to distribute coms in priority to some agents, to up their efficiency and com results.

Click on « **Social network** », and select « **Distribution rules** »:



Click on  to create a new distribution rule, give it a name and save:



Web Administration - Mozilla Firefox  
 lb250s3-634584618.eu-west-1.elb.amazonaws.com/hermes\_net\_v5/admin/WebAdmin/login.aspx

**Hermes.Net Administration** V.5  
 Copyright © 2001-2013 Vocalcom Software, Inc.

Human resources Incoming media Outgoing media Social networks Common settings Tools

Social network rules distribution list

| NAME        | RULES LIST |
|-------------|------------|
| New (Test)  | 0          |
| test langue | 0          |
| testfafa    | 0          |
| TOTO        | 0          |

INFORMATION  
 Name:

RULES

| NAME | DESCRIPTION |
|------|-------------|
|      |             |

Status: OK Company / Site : V5\_250 (1) User : François Tamida

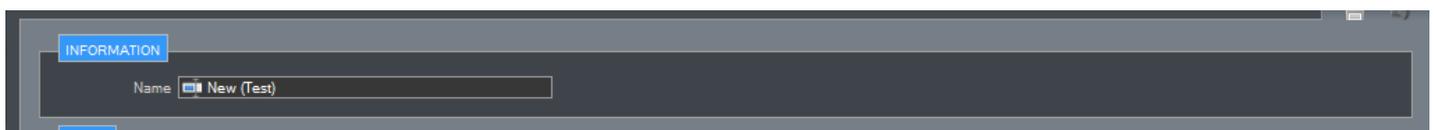


Add a rules group

Name:

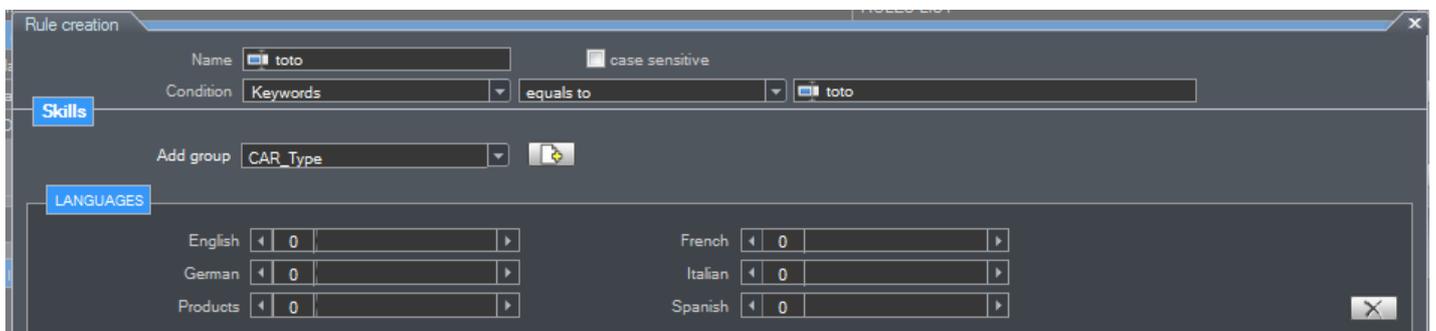
OK Cancel

Click on  to add all required rules:



INFORMATION  
 Name:

For each, decide with skills group and skills are linked to which elements, such as language, etc...



Rule creation

Name:   case sensitive

Condition:  equals to

Skills  
 Add group:  

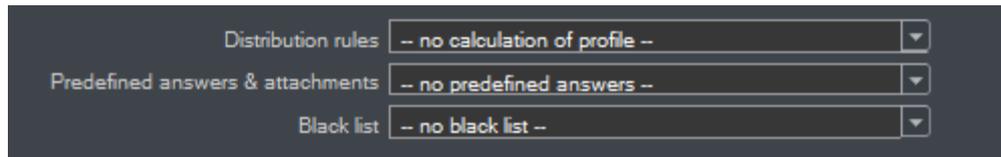
LANGUAGES

|          |                                |         |                                |
|----------|--------------------------------|---------|--------------------------------|
| English  | <input type="text" value="0"/> | French  | <input type="text" value="0"/> |
| German   | <input type="text" value="0"/> | Italian | <input type="text" value="0"/> |
| Products | <input type="text" value="0"/> | Spanish | <input type="text" value="0"/> |



**NOTE: Skills are created in the « Human Resources » menu in Administration. Skills are optional and campaigns can function without any added.**

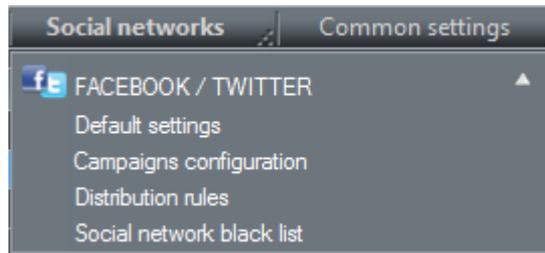
Once the distribution rules are created, open the **"Inbound"** tab in your campaign, and add them all there:



### 17- Black lists

Black lists enables the ban of some words, keywords in conversations and messages in the social network campaigns. Judd import these keywords from a file.

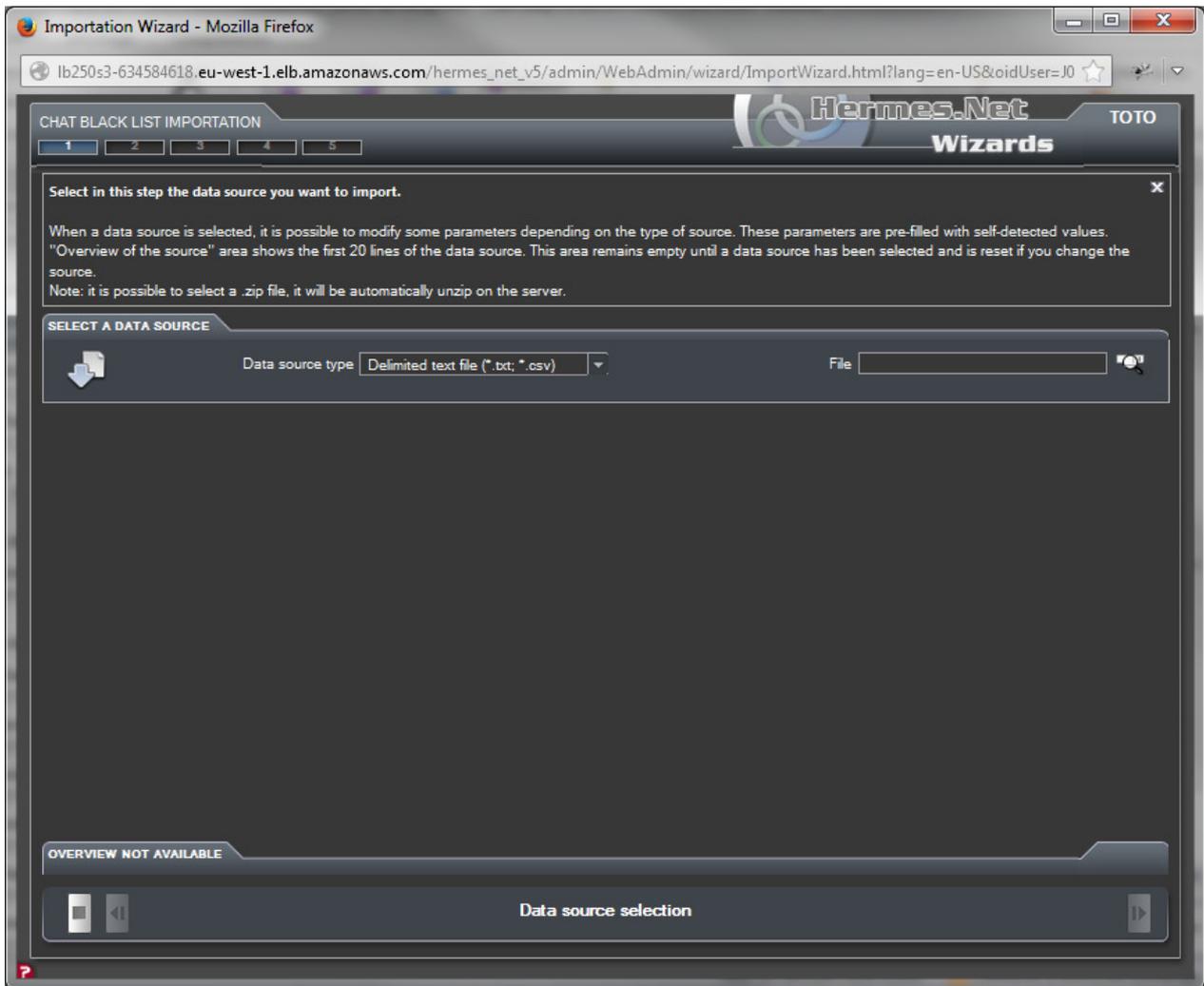
Click on **"Social networks"** and select **"Social network black list"**:



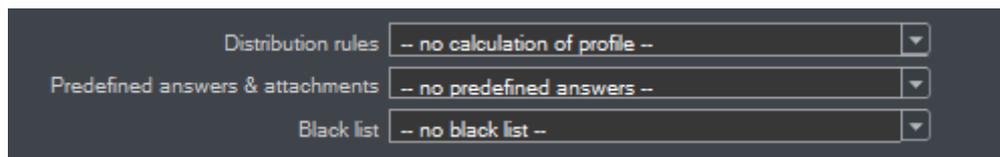
Click on  to create a black list, give it a name, select a database and validate :



Click now on  to import your list of keywords following the classic import sequence :



Once the import is done, save and go back to the **"Inbound"** tab in the campaign. Add the black list there:



**NOTE: Black lists are optional, campaigns can function without.**

### 18- Review and finalize 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:

Campaign Graphic View - Mozilla Firefox

lb250s3-634584618.eu-west-1.elb.amazonaws.com/hermes\_net\_v5/admin/WebAdmin/wizard/

**QUEUE**

Queue : 513 - CloudCampusQueue\_Twitter

**AGENT(S)**

1008 - Chen Dai  
 1011 - Hicham Lhachimi  
 1015 - Barry Mayhew  
 1016 - Jo Groulx  
 1037 - Mike Eva

**SELECTED CAMPAIGN**

Description : CloudCamp  
 Campaign Id (or DID) : B424A546845414B4  
 DataBase : SQLSERVER  
 Used table : S1\_000019

**QUALIFICATION**

Group : 3 - VOCALCOMUK\_Facebook/Twitter

**WEB SCRIPT**

This campaign has no web script associated.

**PLANNING**

Service hours : Horaires Dev  
 Holidays plan : UK Holidays 2013/4

