Eyebeam – Internet Phone

Log into the Eyebeam 1.5 soft phone **FIRST**. The icon can be found on your desktop. Username format is the first initial of first name plus the lastname.

Ex: flastname

When the eyebeam logs in correctly, you will see your extension number. (eg 300).

**Headset** – You should test your headset to make sure that you can hear and be heard. A quick test is to Click on the green phone icon on the eyebeam phone. You will hear dialtone in your headset, and you will see the red and green led bars go up and down as you talk. Press the red hangup icon when the test is complete.

If you don’t get speaker or mic to work, Then right click your mouse, select Options, Select the Devices from the left menu bar, then make sure that your headset is selected in the Headset section. **NOTE-** You usually only need to do this test if you are having problems.
VICIDIAL SYSTEM

*Make sure you are logged into the Eyebeam phone system even if you don’t plan to use it. Vicidial requires the eyebeam connection. The system will switch to a green screen and ask you to call agent again if you do not have the phone connected. *

Log into the Vicidial System. You will find a bookmark for the Vicidial system on your desktop. This is the front page for the case management system. Here you will log in as an agent:

https://callcenter.chrr.ohio-state.edu

Vicidial has two parts of the login process. One is the PHONE LOGIN, and one is the AGENT LOGIN. They require different login names, but the same password. Agents click the agent login:

Select AGENT from the list.

To log into the PHONE LOGIN, enter the ext# that you found when logging into Eyebeam, then enter your password. (e.g. #450).
Next is the AGENT LOGIN screen. The login credentials are the same as the eyebeam login (lastname). You will pick the campaign from the drop down selections.

As soon as you successfully log in, your eyebeam phone will ring. Answering this call will put you in a conference that you will stay in until you log out of Vicidial. Do not manually hang up the eyebeam, or click the back button on your browser. If you do, log out and log back in. Always use the Vicidial web agent page to hang up calls and to dial. Logging out of Vicidial will hang up the conference call.

VICIDIAL HOMEPAGE

This is the main Vicidial homepage. There is no case loaded at this time. There are two “folder tabs” on the main agent page. One is “SCRIPT” and the other is “VICIDIAL”. The Vicidial tab will hold caller information, as well as general comments that will be passed to the next agent to view if the number is called again. Feel free to put comments in this tab.

From this Main screen, you can pull up cases by searching, take the next case in the list, call the respondent (main or alt numbers), launch the survey, leave notes, change respondent information, change the outcome of a case, or cancel.
DIALING FROM THE LIST

To dial from the preloaded list, first click LEAD PREVIEW. This will load the next case in the list and allow you to preview before dialing. To dial, click on the phone number you wish to call (e.g. 6147923406). This system stores alternate numbers, so more than one number may be shown. This will call the respondent and make the SCRIPT pop up to aid you in your conversation. When complete, you will click HANGUP CUSTOMER then code the call using the DISPOSITION screen that will pop up automatically.

Click the Phone Number that you wish to dial from the Title Bar.
SEARCH FOR A RESPONDENT IN THE SYSTEM

Click the **Search for Case** on the bottom right of the window. This will allow you to search from the list of preloaded Campaign respondents on certain criteria such as **Phone Number**, **Street Address**, or **Case ID**. After entering one of those criteria, click on the **PHONE NUMBER** that you would like to load.

SEARCH SCREEN

![SEARCH SCREEN](image1.png)

SEARCH RESULTS

![SEARCH RESULTS](image2.png)

*Clicking **PHONE NUMBER** loads it into the main screen.

CASE HISTORY

From the main screen, you can also click **SHOW CASE HISTORY** to get a brief summary of case call activity.

**Example of HISTORY:**

![Example of HISTORY](image3.png)
The Web Form button will spawn a live web survey web link for the current respondent on the phone or in person.

After completing the survey, please come back to main agent page and finish up your case disposition.

Click SET DISPOSITION to go to the disposition page and finish the case. Click CANCEL from the main screen to cancel any changes you might have made in the Case information.

WEBFORM 2 can be used for additional functions (email campaign, etc) depending on the campaign requirements.
CASE DISPOSITIONS

After clicking the SET DISPOSITION, choose the more accurate case disposition for the open case. Highlight the disposition, then click SUBMIT and PAUSE. You will then return to the main Vicidial screen.

MANUAL DIAL

Sometimes you will need to manual dial a number that isn’t directly related to a lead. While paused, select Manual Dial from the bottom of the page of the main screen:
Dial Code is “1”.

Phone Number is a 10-digit number to dial.

Search Existing Leads Checkbox needs to be checked.

After the number has been dialed, select a disposition and it will be added to the leads database.

-END-