Steps to log in to the Eyebeam Softphone

Step 1: Click on the Eyebeam softphone icon	Å *
Step 2: Enter username and Password Username: Password: Select Remember Settings and click on Log In	Log In Please log in to your account Username: mlowden Password: Password: Image: Cancel Log In
Step 3: Place headset on your head and check microphone and sound settings.	
<i>Exit the soft phone.</i> Step 4: Click on the dropdown arrow and select exit.	Hing up aparagepting aparage
Step 5: Confirm the exit.	Confirm to Quit Are you sure you want to close The Ohio State University eyeBeam? Do not show this dialog box again OK Cancel

Steps to log in to the ViciDial Dialer System

Step 1: Bookmark the following link. This is the front page for the dialer. Here you will log in as an agent:	https://callcenter.chrr.ohio-state.edu
Step 2: Welcome screen select your user type Interviewers: Select Agent Login Agents CM : Select Agent CM Admin and sytem personnel: Select Administration	Melcome Agent Login Agent CM Administration
Step 2: Access your Phone Login Click on the Submit button. Enter your Phone Login: Enter your Phone Password: Click on the Submit button.	Timeclock Phone Login Phone Login Phone Password SUBMIT VERSION: 22.1259 BUILD: 100510-2014
Step 3: Access your Campaign Login Enter your User Login: Enter your User Password: Select Campaign: Click on the SUBMIT Button.	Timeclock Campaign Login User Login: mlowden User Password: Campaign: PLEASE SELECT A CAMPAIGN SUBMIT Refresh Campaign List VERMION: 22 L246 RUITLD: 100310-2014

IMPORTANT: 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. Always use the ViciDial web agent page to hang up with the customer and dial.

October 9, 2013 AGENT TRAINING MANUAL FOR VICIDIAL SYSTEM

DECISION SCREEN You are automatically in PAUSED mode, and in between leads. To access the next case: Step 1: Select LEAD PREVIEW Step 2: Click on DIAL NEXT NUMBER to display the next respondent's information on the screen. Step 3: Click on <u>DIAL LEAD</u> or <u>SKIP LEAD</u> or <u>SET DISPOSITION</u>	Logged in subset: milowden on Phone: SIP/80120 to cample: PMTEST Discont PMDEST Discont PMDEST<
LIVE CALL SCREEN Live Call/ No Live Call visual status on the top right portion of the agent page. Script tab will display the script you are to read to the gatekeeper Once you are done talking to the respondent or gatekeeper click on the HANGUP CUSTOMER button which will take you to the disposition screen	Image: Construction of the second
CALL DISPOSITION SCREEN Once you have terminated the call by clicking on HANG UP CUSTOMER you can select the call disposition and click on <u>SUBMIT</u> You can also access the CALL DISPOSITION screen by clicking on <u>SET DISPOSITION</u> from the DECISION SCREEN without clicking on DIAL LEAD. After clicking on SUBMIT you will be taken to the DECISION SCREEN where you will repeat the process to dial the next lead.	DISPOSITION CALL 6144427320 <u>Hangup Again</u> minimize CALL DISPOSITION A - Answering Machine Business B - Busy CALLBK - Scheduled Call Back CLEAR FROM SUBMIT

CALLBACK SCREEN Callback dispositions will instruct the system to call an available agent at a future date. Callbacks are set in the Agents disposting screen which means the call must be hung up before you can set the callback date/time. Agents should get the date/time from the Respondent before hanging up. Select the hour the minutes and AM or PM. Enter Soft Appointment or Scheduled Callback in the CB Comments. Select the date we are to return the call. After a callback date and time has been selected click on <u>SUBMIT.</u>	Select a CallBack Date :: Select a CallBack Date :: Select a CallBack Date :: My CALLBACK ONLY SUBMIT SUBMIT <t< th=""></t<>
Bookmark the following link. Know the times your center is open DO NOT set up or volunteer to make callbacks for days and times when your virtual callcenter is closed. Partner with your immediate supervisor to know your center's schedule. After a callback date and time has been selected click on <u>SUBMIT.</u>	http://www.timeanddate.com/worldclock/converter.html The system will dial that respondent at the scheduled time at their timezone based on the areacode of their phone number.
DECISION SCREEN Select LEAD PREVIEW and DIAL NEXT NUMBER to see the next respondent's information on the screen. When on manual mode you may be asked to preview the case history before you DIAL LEAD manually. You can do so by clicking <u>See Case History</u>	Logodin as User milworden on Prone: Bir/2012 to campaign RMTEST DIALING CARING (\$14427320 UD D: 8600051 B: 0000051 B: 0000051 B: 0000051 B: 0000051 B: 000051 B: 00052 B: 00051 B: 00052 B: 00051 B: 00052 B: 000
CALLS TO THIS LEAD SCREEN By clicking <u>See Case History</u> you will see all calls to this LEAD. A quick study on the case and the outcomes will help you determine if to dial this lead or if to skp the lead.	CALLS TO THIS LEAD: * DATE/TIME LENGTH STATUS TSR CAMPAIGN LIST LEAD HANGUP PHONE METHOD 1 2013-10-08 1538:01 88 INCALL mlowden RMTEST 510 1394568 CALLER 6144427320 MANUAL

AGENT TRAINING MANUAL FOR VICIDIAL SYSTEM

DECISION SCREEN	STATUS: Calling: (614)4 Preview the Lead then D	SCRIPT	2013-	10-08 15:29 ID: 86000	:24 sessi 51	FAUS	ED DIALING		LOGOUT	
Click on Secret for Coop to get to the Cooreb for	DIAL NEXT NUMBER			First: Bob	Cus	Channel: stomer Informat MI: E Last	ion:			
Click on <u>Search for Case</u> to get to the Search for Leads screen:	RECORD ID: 2371901 START RECORDING WEB FORM	Address1 Address2	; 923 Cha	tham Ln		Iress3:				
Coording for a creatile coord is useful in the	WEB FORM 2 PARK CALL TRANSFER - CONF		: 6144423		Ven Dia	State: OH dor ID: 100003 ICode: 1	Alt. Phor	de: 43220 er: M - Ma ne: 614442		
Searching for a specific case is useful in the event of an inbound call.	HANGUP CUSTOMER	Gomments				Email: mlowden@o	hrr.osu.edu			
	See Case History									
				NO ACT MANUA	IVE CALLE	BACKS S FAST DIAL	earch for Case			
	Agent web-dilent version: 2.2.1.259 BJILD: 100510-2014 Server: 140.254.214.85 Show conference call channel information MUTE C Agents View =									
	Alert is OFF				Search for	Leads				
SEACH FOR LEADS SCREEN	Phone Number:	6144427320		a number any o ompany Name	or all of the fi	elds below to search t	for a lead Case ID:		Search	
	Lead ID CHRR Case ID	Phone Number 6144427320	Status			Company Name 921 Chatham Ln	Callback N/A	List 510	Show History	A II
Enter the search criteria and click on the Search	1394565 100001 1394566 100002	6144427320 6144427320		Bob	Lee	921 Chatham Ln 922 Chatham Ln	N/A N/A	510 510	Show History Show History	
button the leads results will appear below for the	1394567 100003	6144427320	A	Bob	Lee	923 Chatham Ln	N/A	510	Show History	
criteria you have entered.	1394568 100004 1394569 100005	6144427320 6144427320	A	Bob Bob	Lee Lee	924 Chatham Ln 925 Chatham Ln	N/A N/A	510 510	Show History Show History	
	1394570 100006 1394571 100007	6144427320 6144427320	A ANSBUS	Bob	Lee	926 Chatham Ln 927 Chatham Ln	N/A N/A		Show History Show History	
From this screen you can select the case by	1394572 100008 1394573 100009	6144427320 6144427320	A CALLBK	Bob	Lee Lee	928 Chatham Ln 929 Chatham Ln	N/A N/A		Show History Show History	
clicking on the Phone Number hyperlink or	1394574 100010	6144427320	CALLBK	Bob	Lee	930 Chatham Ln	N/A	510	Show History	
select Show History which will display all calls to	1394575 100011 1394576 100012	6144427320 6144427320	A CALLBK	Bob	Lee Lee	931 Chatham In 932 Chatham In	N/A N/A	510 510	Show History Show History	
this lead.	1394577 100013 1394578 100014	6144427320 6144427320	NA NA	Bob Bob	Lee	933 Chatham Ln 934 Chatham Ln	N/A N/A	510 510	Show History Show History	
this lead.	1394579 100015	6144427320	NA	Bob	Lee	935 Chatham Ln	N/A	510	Show History	
	1394580 100016 1394581 100017	6144427320 6144427320	CALLBK		Lee Lee	936 Chatham Ln 937 Chatham Ln	N/A 2013-10-10 13:00:0		Show History Show History	
	1394582 100018 1394583 100019	6144427320 6144427320	INCALL NEW	Bob	Lee Lee	938 Chatham Ln 939 Chatham Ln	N/A N/A	510 510	Show History Show History	
	1394584 100020 1394585 100021	6144427320	NEW	Bob	Lee	940 Chatham Ln	N/A	510 510	Show History	
	1394586 100022	6144427320 6144427320		Bob Bob	Lee Lee	941 Chatham Ln 942 Chatham Ln	N/A N/A		Show History Show History	-
					<u>Go B</u>	ack				,
	Logged in as User: mlow	den on Phone:	SIP/5012	20 to campai	ign: RMTES	BT			LOG	OUT
When on Autodialer Mode:	VICI dial	SCRIPT	201	3-10-04 11: ID: 8600		ssion PAU	SED DIAL	ING	NO LIVE CA	LL
	STATUS: Calling: (614)		M10041					1110	seconds:	
Alert ON/OFF turns on the visual indicator that a	DIAL NEXT NUMBER					everse Mortgage S			refresh	
live call has just been sent to you.	LEAD PREVIEW	1.1.1 Hello			I am	calling on behalf o	f The Ohio State Uni	versity. Ma	y I please	
	RECORDING FILE:	speak with	1 BOD Lee	(
Click on Alert ON/OFF to turn on a web pop up	RMTEST_6144427320_201 RECORD ID: 2371898	³ Yes (skip t	0 1.1.5)							=
function when live calls are transferred into the	STOP RECORDING	No (contin	ue with 1.	1.2)						
agent's conference. This option is located on the	WEB FORM									
bottom left of the agent screen. This will not	WEB FORM 2	 1.1.2 [IF N	O]: Accord	ling to our re	cords, Bob	Lee received cour	nseling for a reverse	mortgage	at some point	t
affect anything other than the web pop up.							Attorney for Bob Lee?			
aneor anything other than the web pop up.	PARK CALL TRANSFER - CONF	Yes (contir	nue with 1	1.1.3)						
	HANGUP CUSTOMER	No (skip to	1.1.4)							
	SEND DTMF	1.1.3 [If YE	S to 1.1.2] Did you als	o participat	te in counseling fo	r the reverse mortga	ge?		
	ee Case History					e with 1.1.5 TELL 1 RTGAGE, I CAN TAI	THIS PERSON, "BEC _K WITH YOU")	AUSE YO	U COMPLETE	D
		Yes, and I	had a Po	wer of Attorn	ey (Continu	ue with 1.1.5 TELL	THIS PERSON: BEC	AUSE YO	J COMPLETE	D -
	Agent web-client version: 2.2 Show conference call chan		100510-20	014 S	erver: 140.28	54.214.85			Agents Vie	w +
	Alert is OFF)								
		-								