

How to Use CallHub

Volunteer Guide



Welcome... and thank you for being a volunteer!

This guide is for volunteers who use CallHub to call the Second Baptist church family. CallHub runs within your own web browser. It dials phone numbers for you, displays a suggested script you can read aloud during your calls, and lets you easily enter notes about each call before you proceed to the next call.

CallHub lets you work as quickly or slowly as you wish. You can call as many people as you want during your volunteer calling times, and you don't have to worry about lists of callers. You just tell CallHub you're ready to make a call, and CallHub automatically selects the next person for you.

1. Things to Know Before You Start

Please review these important points regarding the use of CallHub:

- You must use CallHub, not your phone, to place calls to contacts. Using CallHub displays a Second Baptist Church phone number as the caller ID. It also helps Second Baptist Church track the progress and outcomes of all calls, and it lets you make calls much faster than you could with printed lists and your own phone.
- CallHub runs within a browser on your own desktop computer, laptop, or tablet. Smartphones can also be used.
- Your device must have a microphone and a speaker. If you wish, you may use headsets, headphones, or external speakers and microphones for better call quality, but they are not required. CallHub does not use the camera on your device.
- CallHub runs on some browsers, but not all. We recommend that you use the latest version of Chrome. When you activate your CallHub account, you will run a short browser compatibility test to confirm that your browser will support CallHub.
- CallHub requires a stable, high-speed connection to the Internet (wired or wireless).
- You should use CallHub in a private environment free of background noise.
- CallHub allows calls only during predefined hours.

Contact your campus liaison for assistance if you have any questions or concerns about these important points.

2. Setting Up Your CallHub Account

You must create a CallHub account to participate in calling, but that's very easy. Open your browser, go to <https://www.second.org/callhub>, and follow the steps on the next few pages.

Step 1

Follow the "Create Your Account" instructions displayed on the webpage.

You will be asked to choose a username of your choice, enter your email address, and to select your "team," which Vote 22..

You will activate your new account and set a password later.

Note – cookies must be enabled in your browser to complete this step.

second.org/secondconnects/onboard/

WHO WE ARE EVENTS LOCATIONS GIVE LOGIN

CREATE YOUR ACCOUNT

TO CREATE YOUR ACCOUNT WITH CALLHUB.IO, CONFIRM YOU HAVE THE FOLLOWING TECHNOLOGY: DESKTOP OR LAPTOP COMPUTER (WINDOWS OR MAC), MICROPHONE, SPEAKERS CONNECTED TO YOUR COMPUTER

1. Complete the form at the bottom of this page
2. Activate Your Account Using the Link in the Email Sent to You from CallHub
3. Create Your Password

Username
DanielL

Email
dleifker@second.org

Choose your Team
Woodway

LOGIN

IF YOU ALREADY HAVE AN ACCOUNT LOGIN TO CALLHUB, UPDATE YOUR PROFILE, & MAKE SOME PRACTICE CALLS

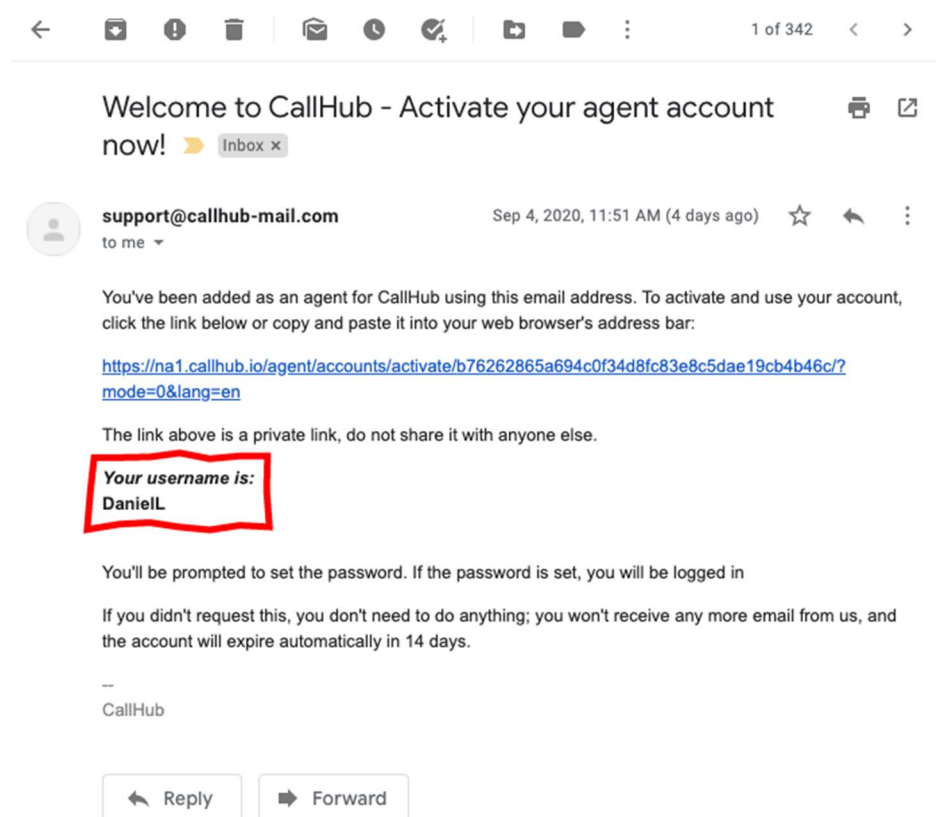
LOGIN

Step 2

CallHub will send you an "activation email" like this that shows the username of your new account.

If you don't get an email like this, check your junk email folder.

Follow the instructions in the email. You'll need to click a link like the one shown here.



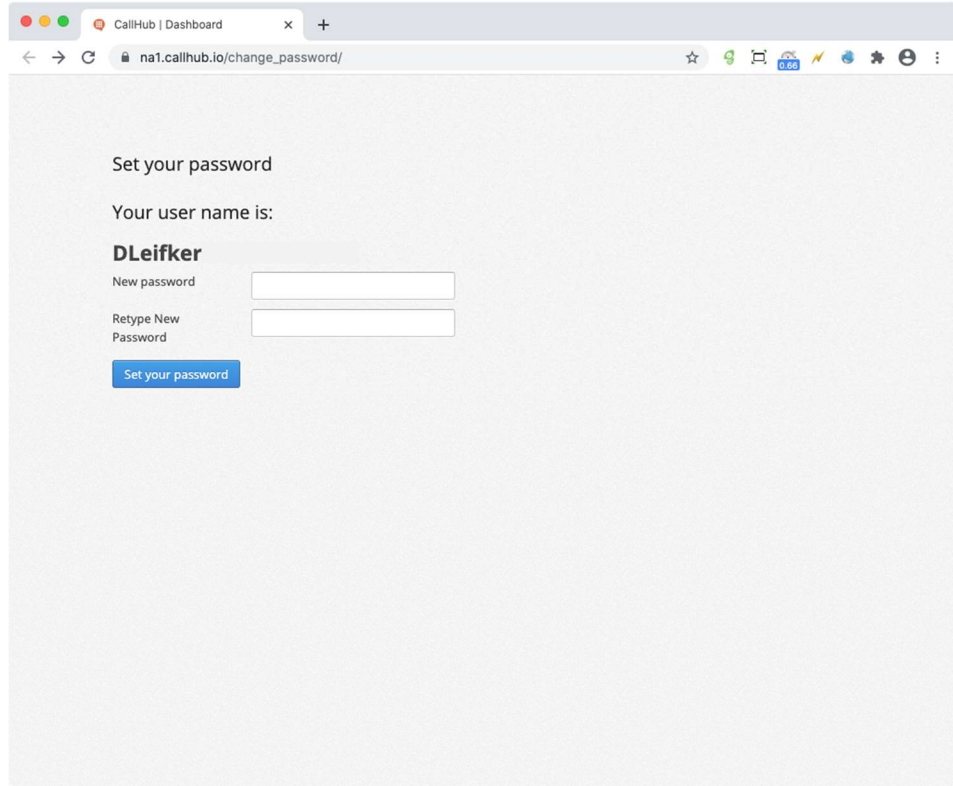
Step 3

CallHub will display a page like this where you must select a new password for your new account.

Choose a password and enter it twice.

Write your new username and password down, because you'll need them to log in later.

Click **Set your password** to activate your new account.



The screenshot shows a web browser window with the address bar displaying "na1.callhub.io/change_password/". The page content includes the heading "Set your password", followed by "Your user name is:" and the username "DLeifker". Below this are two input fields: "New password" and "Retype New Password". A blue button labeled "Set your password" is positioned below the second input field.

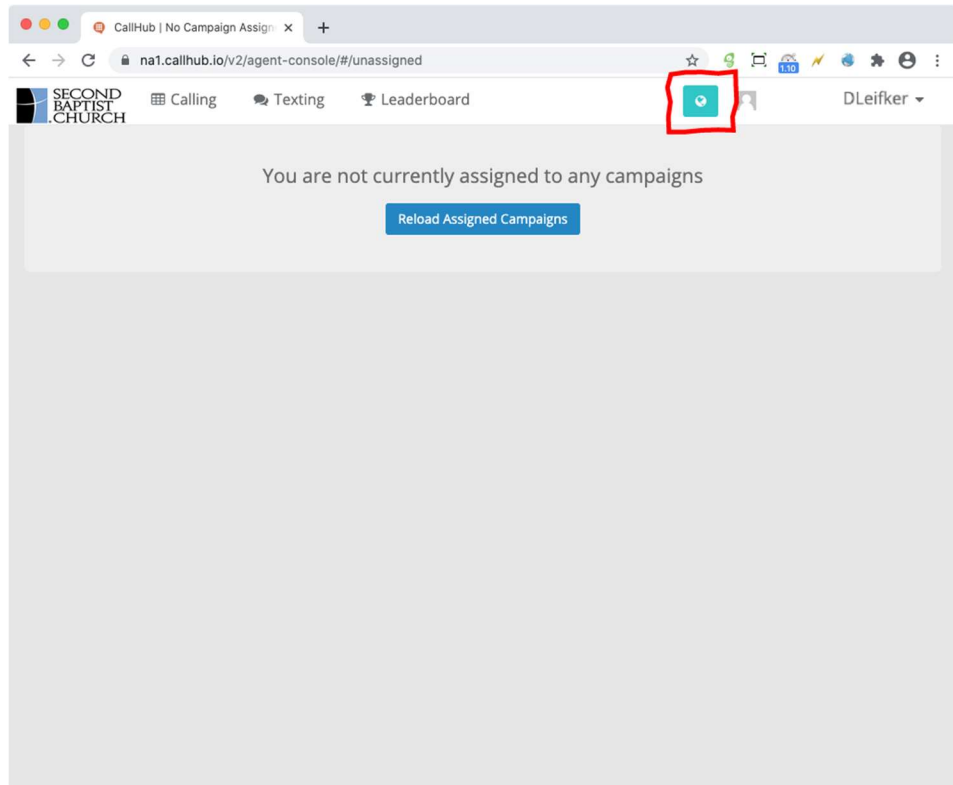
Step 4

Your new account has not yet been assigned to any campaigns.

Campaigns are explained later in this document.

Look for the square button in the upper-right corner of the page next to your username and click it.

This button will check your browser to make sure it is compatible with CallHub.



The screenshot shows a web browser window with the address bar displaying "na1.callhub.io/v2/agent-console/#/unassigned". The page header includes the logo for "SECOND BAPTIST CHURCH" and navigation links for "Calling", "Texting", and "Leaderboard". The user's name "DLeifker" is displayed in the top right corner. A red square highlights a small blue square button with a white circular icon containing a plus sign, located next to the user's name. The main content area displays the message "You are not currently assigned to any campaigns" and a blue button labeled "Reload Assigned Campaigns".

Step 5

Look for a message that says, "Your browser is supported by CallHub." (You may need to scroll down to see it.)

If you see this message, then your browser is compatible with CallHub.

If you see any red boxes with warnings such as "not available" or "not supported," then stop here and go to **Special Instructions for Unsupported Browsers** on page 7.

CallHub | Dashboard x CallHub Browser Check x +

na1.callhub.io/browser-check/

CallHub Browser Check

This page will test your browser for CallHub browser call compatibility. Supported browser: **Chrome**.

Tue Sep 08 2020 13:43:42 GMT-0500 (Central Daylight Time)

OS : Macintosh; Intel Mac OS X 10_15_6

Browser Version : Chrome 85.0.4183.83

JavaScript version 1.7

WebSocket : available

Microphone: Available: (Default - Display Audio (05ac:1107),Display Audio (05ac:1107),MacBook Pro Microphone (Built-in),ZoomAudioDevice (Virtual)), Website Permissions:true

Speaker: Available: (Default - Display Audio (05ac:1107),Display Audio (05ac:1107),MacBook Pro Speakers

Your browser is supported by CallHub

Step 6

Now it's time to add some information to your account profile, so CallHub knows your name.

Click on your username in the upper-right corner. A dropdown menu will appear.

Click **Settings**.

CallHub | No Campaign Assigned x +

na1.callhub.io/v2/agent-console/#/unassigned

SECOND BAPTIST CHURCH

Calling Texting Leaderboard

You are not currently assigned to any campaigns

Reload Assigned Campaigns

DLeifker

- Settings
- Apps
- Logout

Step 7

Enter your first name and last name. You will save your changes in the next step.

CallHub does not share this information with the people you call.

If you ever need to change your CallHub password, come back to this page and click the **Change Password** tab.

The screenshot shows a web browser window with the URL na1.callhub.io/v2/agent-console/#/settings. The page title is "My Settings" and it is for "SECOND BAPTIST CHURCH". There are three tabs: "Change User Details" (active), "Change Password", and "SIP Details". A note says "The required fields are marked with a star *". The "First name" field contains "Daniel" and the "Last name" field contains "Leifker". These two fields are enclosed in a red hand-drawn box. Below them are fields for "Email address" (dleifker@second.org), "Address", "City", "State", "Country" (United States), and "Zip code".

Step 8

Scroll to the bottom of the page and click the green **Save changes** button.

We're done! Time to logout.

Click on your username in the upper-right corner of the page.

A dropdown will appear. Click on **Logout** to log out.

The screenshot shows the same "My Settings" page, but scrolled down. The "Save changes" button at the bottom is highlighted with a red box. In the upper right corner, the user's profile "DLeifker" is shown with a dropdown menu. The dropdown menu is also highlighted with a red box and contains three options: "Settings", "Apps", and "Logout". The form fields below include "Address", "City", "State", "Country" (United States), "Zip code", "Phone number" (17133656057), "Company name" (Second Baptist Church), "Company website" (http://www.second.org), "Language" (English), and "local timezone" (America/Chicago). There is also a "Reset" button next to the "Save changes" button.

Your account is now activated and ready to use, but you cannot begin making calls until your campus liaison notifies you. Please wait for this notification or contact your campus liaison for assistance.

3. Special Instructions for Unsupported Browsers

If you followed the set-up instructions and passed the browser compatibility check (steps 4 and 5 in the previous section), then skip this section and proceed to Section 4 below. However, If the browser check displayed any red boxes like these, typically with words such as "not available" or "not supported," then close your browser and follow the instructions in this section.

Important note: The browser compatibility check may display yellow boxes and still pass. A failure occurs if you see one or more red boxes.

CallHub Browser Check

This page will test your browser for CallHub browser call compatibility.

Fri Sep 11 2020 13:59:09 GMT-0500 (CDT)

OS : Macintosh; Intel Mac OS X
10_15_6

Browser Version : Safari 13.1.2

JavaScript version 1.7

WebSocket : available

Microphone: Available: (Microphone
1), Website Permissions:false

Speaker: Not Available

Flash is not supported

WebRTC is not supported

Checking your
browser for
compatibility with
CallHub

Verify that your computer or laptop has a working microphone and speaker. If it lacks either or both of these, you cannot use it for CallHub.

If you confirm that your microphone and speaker are working correctly, and you still get the red-box warnings, then follow the instructions below.

1. If you are already using Chrome as your browser (which is the recommended browser for CallHub), update it to the latest version. Go to <http://2nd.org/UpdateBrowser> and then find the instructions at the "How to Update Chrome" link on this page. Open Chrome, go to <https://www.second.org/callhub>, and log in to CallHub. Then resume at step 4 on page 4 of this document.
2. If you are not using Chrome as your browser, then download Chrome from <http://google.com/chrome> and install it. Open Chrome, go to <https://www.second.org/callhub>, and log in to CallHub. Then resume at step 4 on page 4 of this document.

3. If neither (1) nor (2) above eliminates the red-box warnings in the browser check, then it is possible your operating system is out of date and needs an update. If you are using a PC, go to <http://2nd.org/UpdateWindows> for help updating the Windows operating system. If you are using a Mac, go to <http://2nd.org/UpdateMac> for updating the Mac operating system. Then repeat steps (1) or (2) above, as appropriate.

4. Making Your First Test Call with CallHub

Test phone numbers have been set up that allow you to learn CallHub and practice your skills. When you call these numbers from CallHub, no human will answer. Instead, you will automatically reach a recording that does not accept voicemails.

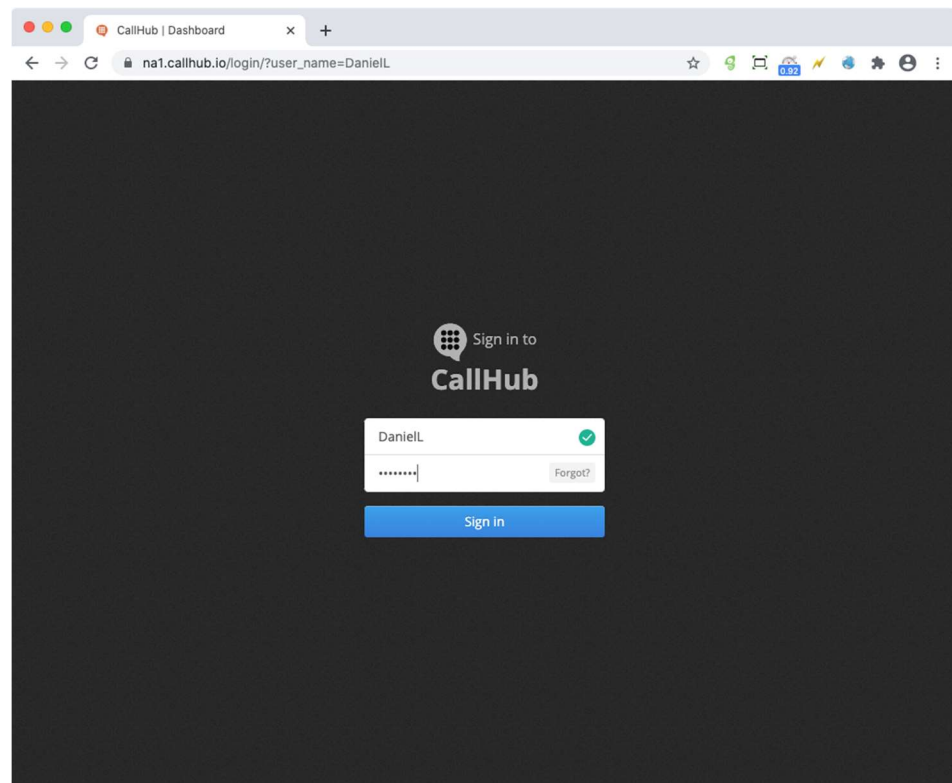
These test phone numbers do not listen to anything you say, and you can practice without fear of doing anything wrong or reaching a wrong number. If you make mistakes, nobody will hear them. When you are comfortable making calls to the test number, you'll find it very easy to begin calling real people.

As soon as your campus liaison notifies you that you may begin calling the test number, open your browser and go to <https://www.second.org/callhub>. Click the link to log in to CallHub.

Step 1

*Enter your username and password, and click **Sign In**.*

If you have recently used CallHub, you may not be prompted to enter a password.



Step 2

CallHub displays all the "campaigns" you can join.

Campaigns are explained in Section 5 of this document.

To reach the test phone numbers that play a recording, always click on **Training Campaign**.

Important note:
CallHub will skip this page if you are assigned to only one campaign. If you do not see this "My Campaigns" page, simply proceed to Step 3 below.

Campaign Name	Capabilities	Total Contacts	Completed	Remaining	Scheduled Calls	Campaign Status
Training Campaign	x	100	20	80	0	Running
Test of 100	x	100	32	68	0	Running

Step 3

You are now in a campaign named "Training Campaign."

Now click the **Join Campaign** button. This tells CallHub that you are ready to start calling.

Join Campaign

Hello, my name is {agent_name} from Second Baptist Church and we are calling our Second family to check in and see how we can be praying for you.

Is this {first_name}? Do you have a moment?

How are you and your family doing?

(Add any key information down in Notes. Ex. Deaths, births, serious illness or anything that needs a pastor to call right away.)

How can our church be praying for you and your family?

May I pray for you before we end our call?

(After you have completed the call, please choose the Call Disposition that best matches the results of the call.)

Set Call Disposition:

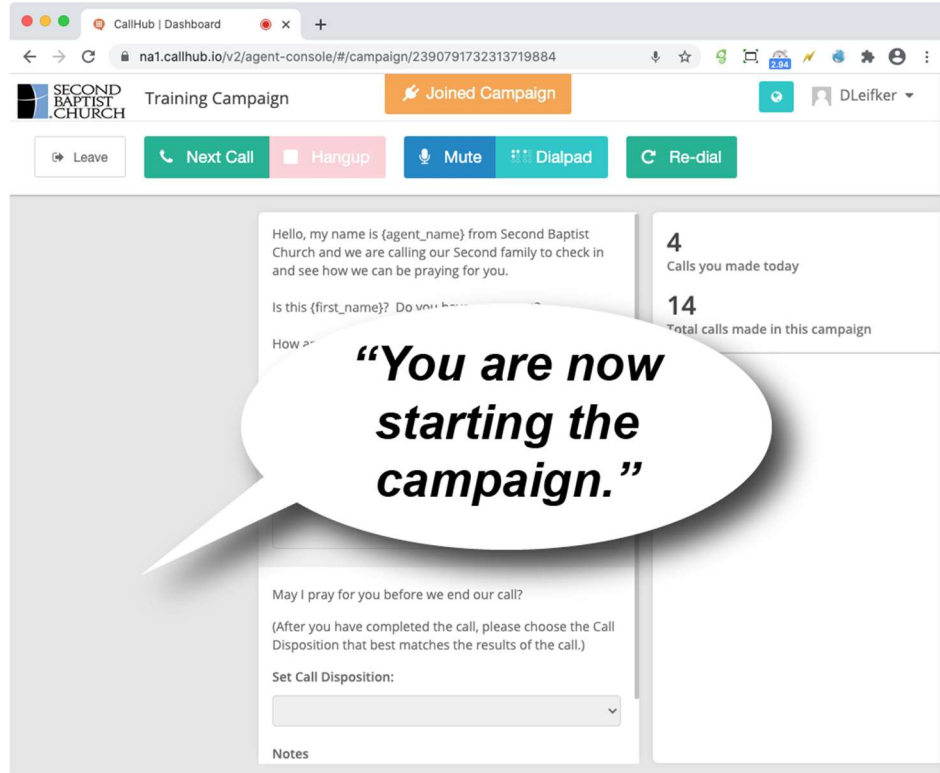
Notes

Step 4

You may briefly see a small blue message that says, "Calling you." This is not the outbound call that you are planning to make.

CallHub will then display a row of colored buttons across the top of the page and say these words aloud: "You are now starting the campaign."

This does not initiate an outbound call yet.



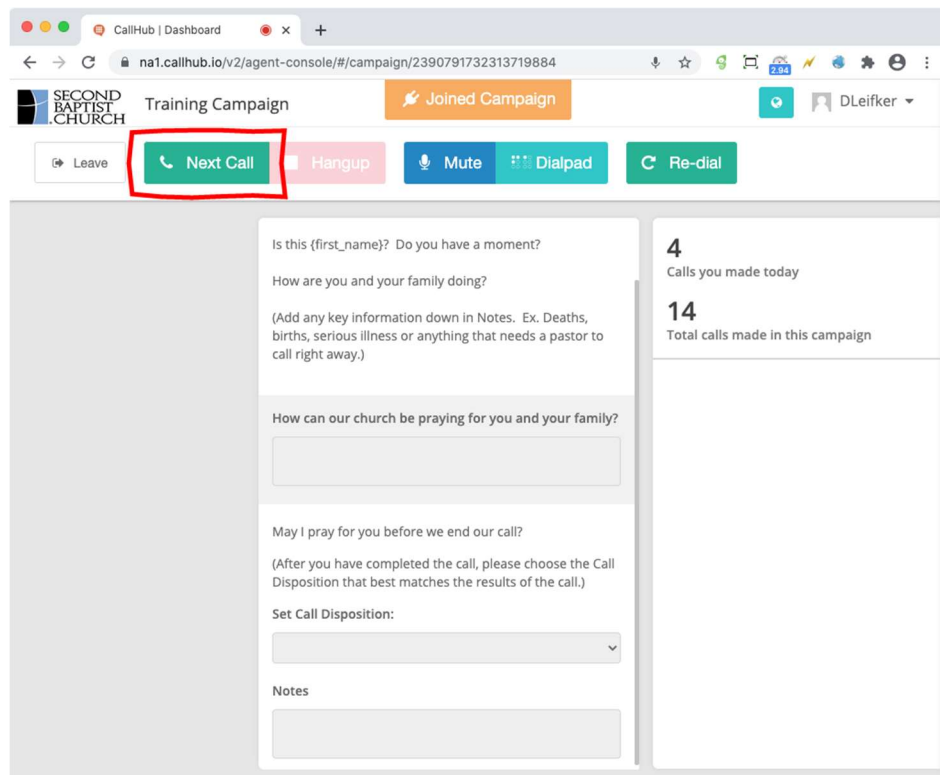
Step 5

Look for the green button in the top left of the screen that says **Next Call**.

When you click this button, CallHub will select a person to call and dial the number for you.

The identity of the person you call will be displayed after you click the **Next Call** button.

When you're calling a real person (and not a test phone number), be sure you're ready to talk when you click **Next Call**.



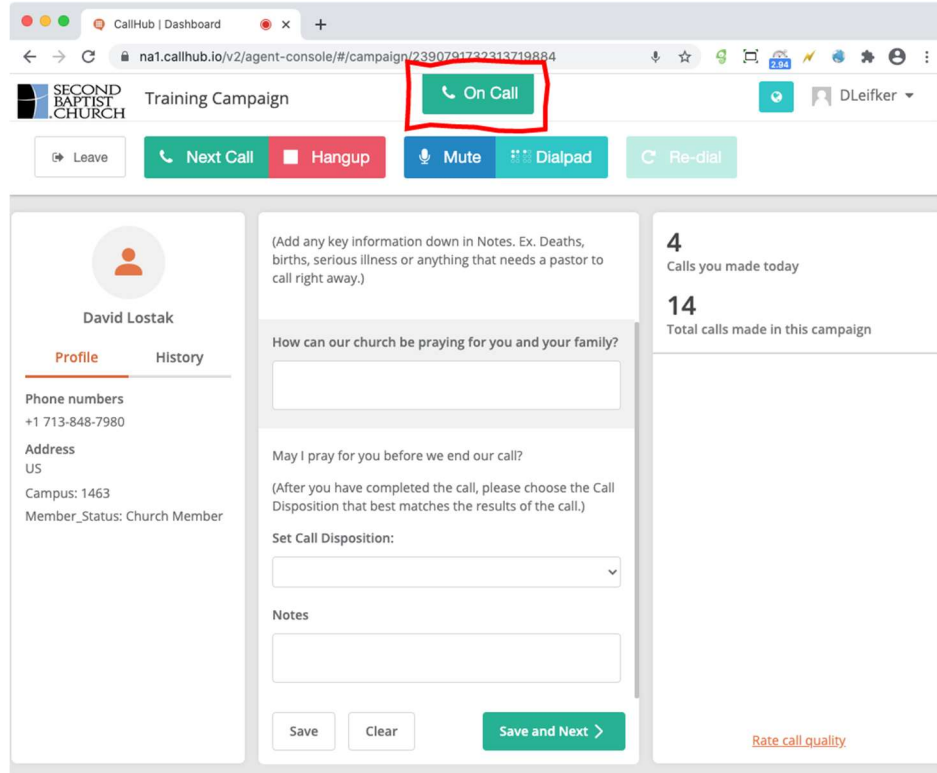
Step 6

Look for a green box at the top of the screen. After you click **Next Call**, it will change from **Calling** to **Ringing** to **On Call**.

On Call means the person you called (the "callee") has picked up, and you may begin the conversation.

The callee's contact information now appears on the left side of the screen.

Remember that calls to the test phone number will reach a recording, not a person.

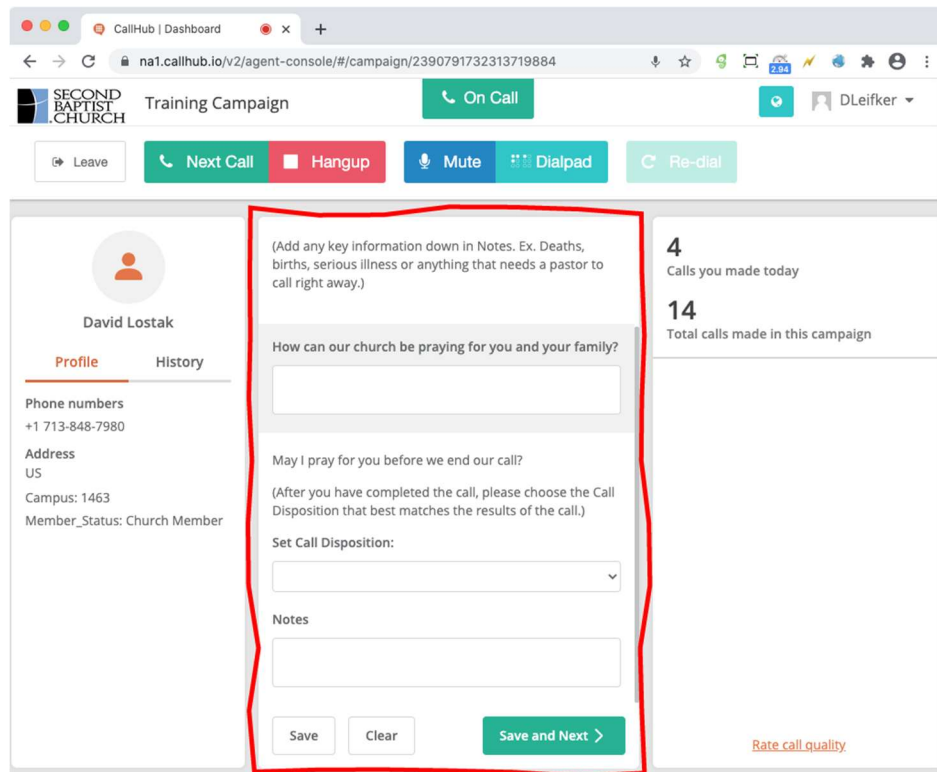


Step 7

The center column of the screen contains the script or the words you can read aloud to the callee.

During a test call, the recording you hear cannot talk to you, of course, but in a real call with a human, this is where you will be talking and listening.

Follow the script, scrolling down as needed.



Step 8

The script requires you to Set a Call Disposition. You should select a "disposition" of the call that describes how the call ended.

For calls to the test phone number, enter any values you want. They will be discarded.

The screenshot shows the CallHub dashboard for a 'Training Campaign' by 'SECOND BAPTIST CHURCH'. The interface includes a top navigation bar with 'On Call' and 'DLeifker' profile. Below this is a control bar with buttons for 'Leave', 'Next Call', 'Hangup', 'Mute', 'Dialpad', and 'Re-dial'. The main content area is divided into three columns. The left column shows the profile of 'David Lostak' with details like phone numbers, address, and member status. The middle column contains a form with several sections: a text area for 'How can our church be praying for you and your family?', a question 'May I pray for you before we end our call?', a 'Set Call Disposition' dropdown menu, and a 'Notes' text area. The 'Hangup' button in the top control bar and the 'Notes' text area are highlighted with red boxes. The right column displays statistics: '4 Calls you made today' and '14 Total calls made in this campaign'. At the bottom of the form are 'Save', 'Clear', and 'Save and Next' buttons, along with a 'Rate call quality' link.

Step 9

When you finish your conversation with the callee, click the red **Hangup** button.

You will still be able to edit your answers to the Call Disposition after you hang up.

This screenshot is identical to the one in Step 8, showing the CallHub dashboard for the 'Training Campaign'. The primary difference is that the 'Hangup' button in the top control bar is now highlighted with a red box, indicating the action to be taken. All other elements, including the profile information, form fields, and statistics, remain the same as in the previous screenshot.

Step 10

When you are satisfied with your answer, then click **Save**.

When you're ready to make another call, click **Next Call** and repeat the process in the steps above.

Or, if you're ready to make the next call immediately with no pause, just click **Save and Next**, which saves your information and starts a new call with one click.

The screenshot shows the CallHub dashboard for a 'Training Campaign' for 'SECOND BAPTIST CHURCH'. The user is 'DLeifker'. The dashboard includes a top navigation bar with 'Leave', 'Next Call', 'Hangup', 'Mute', 'Dialpad', and 'Re-dial' buttons. The 'Next Call' button is highlighted with a red box. Below the navigation bar, there is a profile section for 'David Lostak' with fields for phone numbers, address, and campus. The main content area contains a form with questions like 'How can our church be praying for you and your family?' and 'May I pray for you before we end our call?'. At the bottom of the form, there are 'Save', 'Clear', and 'Save and Next >' buttons. The 'Save' and 'Save and Next >' buttons are also highlighted with red boxes. On the right side, there are statistics: '5 Calls you made today' and '14 Total calls made in this campaign'. A 'Rate call quality' link is visible at the bottom right.

Step 11

When you have completed all the calls you wish to make, click the **Leave** button to exit the campaign.

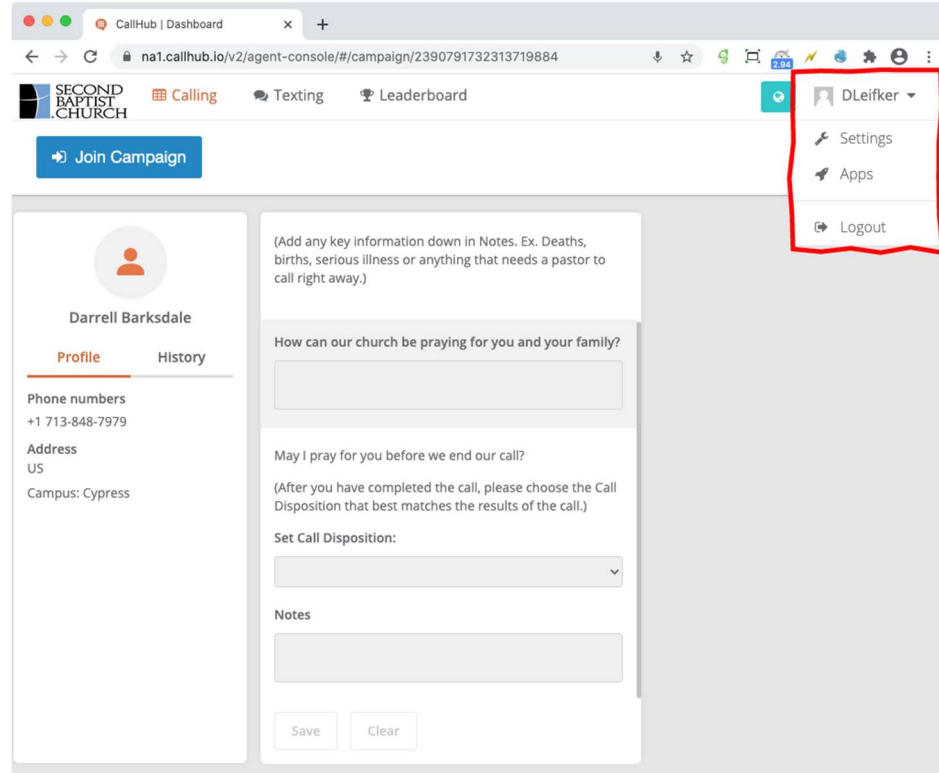
The screenshot shows the CallHub dashboard for a 'Training Campaign' for 'SECOND BAPTIST CHURCH'. The user is 'DLeifker'. The dashboard includes a top navigation bar with 'Leave', 'Next Call', 'Hangup', 'Mute', 'Dialpad', and 'Re-dial' buttons. The 'Leave' button is highlighted with a red box. Below the navigation bar, there is a profile section for 'David Lostak' with fields for phone numbers, address, and campus. The main content area contains a form with questions like 'How can our church be praying for you and your family?' and 'May I pray for you before we end our call?'. At the bottom of the form, there are 'Save', 'Clear', and 'Save and Next >' buttons. The 'Save' and 'Save and Next >' buttons are also highlighted with red boxes. On the right side, there are statistics: '5 Calls you made today' and '14 Total calls made in this campaign'. A 'Rate call quality' link is visible at the bottom right.

Step 12

Now log completely out of CallHub.

Click on your username in the upper-right corner and then click **Logout**.

CallHub may display information from your most recent call even after you leave a campaign, so be sure to log out completely when you have finished making calls.



Feel free to call the test phone numbers in the Training Campaign several times until you are comfortable using CallHub. The next few sections explain some final details about making calls to real persons.

5. Selecting a Campaign

CallHub never asks you to choose the next person to call. Instead, CallHub chooses a person for you, dials the number, and then displays the name and contact information of that person. CallHub refers to the group of people being called as “campaigns”.

6. Leaving Voicemail and Sending Texts

If you reach the callee's voicemail during a call, do not hang up. Leave a friendly message, such as the suggested voicemail message shown at the bottom of the CallHub script. Then mark the disposition of the call as LEFT_MESSAGE, as explained in the next section.

Second Baptist does not send texts to the church family. Do not attempt to send a text within CallHub, and do not text the callee from your own phone.

7. Setting the Call Disposition

The suggested script for your calls contains a "call disposition" dropdown item that you must set during or after each call. The value you select helps categorize the call and mark it for possible further action, such as updating church records or re-contacting the person in Spanish.

The table below shows the values you should choose and an explanation of when each value is appropriate. Use the Notes field in the script to add any further details.

Call Disposition	When To Use
DO_NOT_CALL	The callee requests no further calls of any kind from Second Baptist Church.
LEFT_MESSAGE	The volunteer caller left a voicemail message.
MEANINGFUL_INTERACTION	The callee answered, and the caller had a meaningful conversation with him or her. This is the desired outcome of all calls.
NOT_INTERESTED	The callee is not interested in the purpose of the call.
NO_ANSWER	The call rang, but neither a person nor voicemail answered.
Moved Away	The callee no longer lives in the Houston area.
No Longer Attends Second	The callee is now attending another church or no church at all.
Spanish follow-up	The callee answered in Spanish, and the caller could not communicate.
BAD_NUMBER	The call failed, or is a wrong number, or reached a system recording.
USER_BUSY	The called answered but did not have time to talk.

8. How to Make Successful Calls with CallHub

The key to a successful call is to focus on the person you call and to converse naturally. After you click the **Next Call** button, you can turn all your attention to the person you call, using only the script whenever necessary. Nothing else on the CallHub screen requires your attention until the call is over, so just sit back and talk.

During a call, the only three things you should be doing on the CallHub screen are:

- Entering disposition
- Clicking the **Mute/Unmute** button if you need to mute yourself temporarily
- Clicking the red **Hangup** button when your call has finished

Do not click any other buttons or links on the screen during a call, even if CallHub displays them as active and clickable.

Be sure to click the **Hangup** button to disconnect cleanly from each call. You may then finish up any notes you are entering before you save them.

If your call disconnects before your conversation are finished, you may click the **Redial** button. CallHub will redial the callee for you. The callee's phone number will be displayed on your CallHub screen, but you should not use your own phone to redial the callee. If the call ends normally, but you realize you need to talk to the callee again for some reason, you may click the **Redial** button.

Finally, don't forget to click **Save** or **Save and Next**. And then you're ready for your next call!



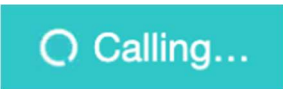




9. Safeguarding Personal Information




The information we provide you via CallHub should be used for the sole purpose of the campaign. Please do not copy, record, photograph, or document the personal information of those included in the call campaigns.

10. Questions, Troubleshooting, or Further Assistance

Please contact your campus liaison with any comments, questions, or concerns about the use of CallHub.

11. Common CallHub Messages

Message	Meaning
 You have only been assigned to one campaign	You are part of only one campaign. CallHub will skip the "My Campaigns" page and go directly to your campaign. You must still click the Join button.
	CallHub is connecting you to a campaign. No action is needed. Displayed after you click the Join button. It does not refer to any outbound calls.
	CallHub is dialing a phone number. Displayed after you click the Next Call button.
	CallHub has dialed a number, and the line is ringing.
	CallHub has detected that the call has been answered and has connected you to the callee. You may begin speaking.
 Call Disconnected: ANSWER	CallHub has disconnected the call because you clicked the Hangup button. No action is needed.
 Mark disposition for this call	You are attempting to save data or exit a call without any value in the "Call Disposition" dropdown item. Set a value and save again.

 <p>Enter notes about this call or answer any survey question</p>	<p>You are attempting to save data or exit a call without entering comments. Set a value and save again.</p>
 <p>Survey submitted successfully</p>	<p>CallHub has successfully saved the information you entered for this call. You may begin a new call or exit the campaign.</p>
	<p>You exited CallHub (typically by closing your browser) before you saved the notes from your last call. When you join the campaign again, CallHub will reopen your last call but will not redial the callee. You must enter call disposition and a comment and save before calling the next callee.</p>