

This guide includes instructions for:

[Logging in for the First Time](#)

[Going to Ready State](#)

[Using the soft phone, script, pausing call recording for credit card collection and ending the call.](#)

[Transferring Calls](#)



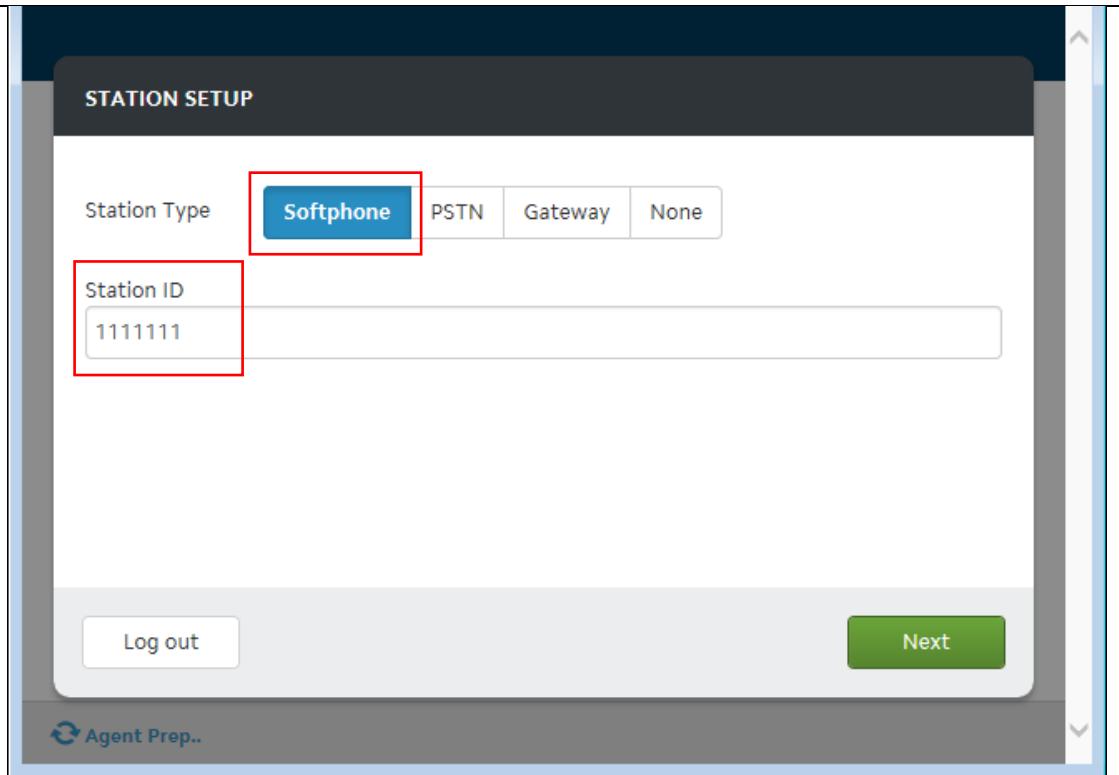
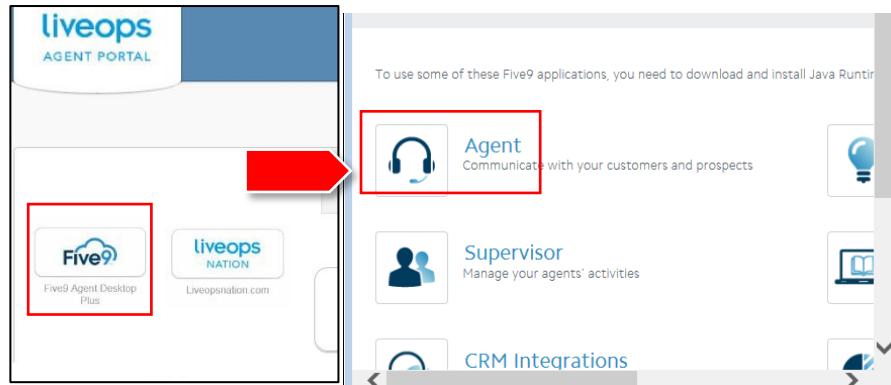
Logging in for the first time.

1. Go to your Liveops Okta page and click the Five9 icon.
2. Click **Agent**.

NOTE: Please use the Chrome browser when installing and using Five9.

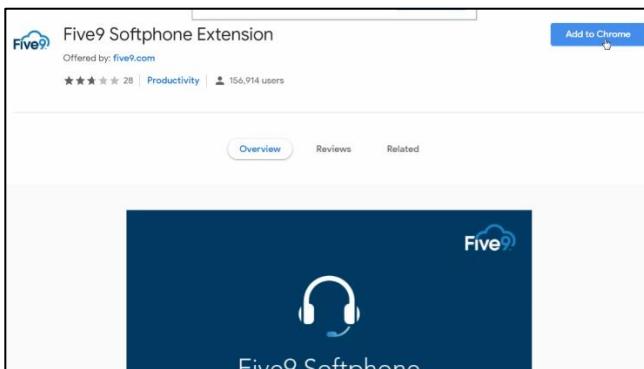


3. Keep **Softphone** selected and enter your **Station ID** (provided by your facilitator).
4. Click **Next**.



5. When you see the prompts as shown on the right, complete steps one and two.

You may need to install the Five9 extension, just follow the prompts. Click **Refresh** after installing.



You may be taken to the **Google Chrome Web Store**.

STATION CHECK

Softphone station requires two additional components.

Step 1: [Install Five9 Browser Extension](#)

 [Refresh](#) to verify the installation

Step 2: [Download and Install Five9 Softphone](#)

Back

[View My Dashboard](#)

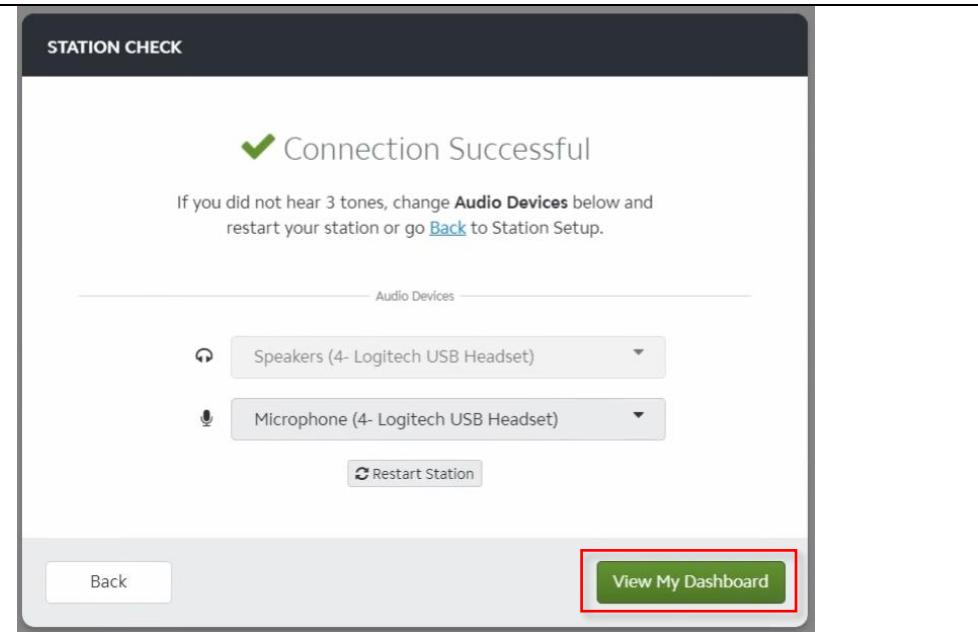
6. After clicking Step 2 (see previous screen), you will see the following pop-up. Select **Install to system space** then click **Next**.



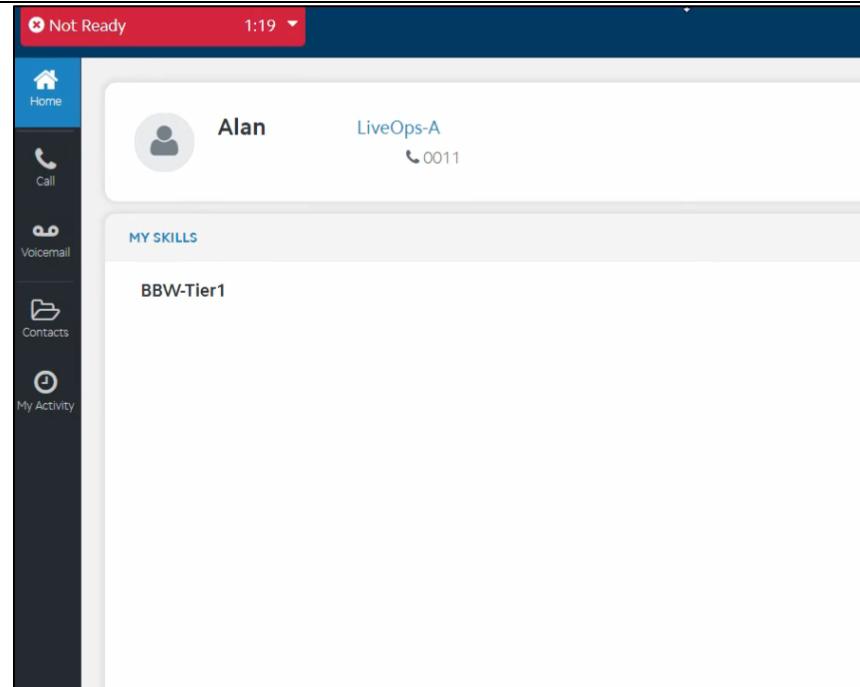
7. Once you have completed all needed downloads and installs you will see the following screen. Click **View My Dashboard**.

Note: If the connection was unsuccessful, you will have the option to change the audio devices (speakers and microphone).

Tip: You can also press the “Restart Station” button which will attempt to reconnect the audio devices to Five9.



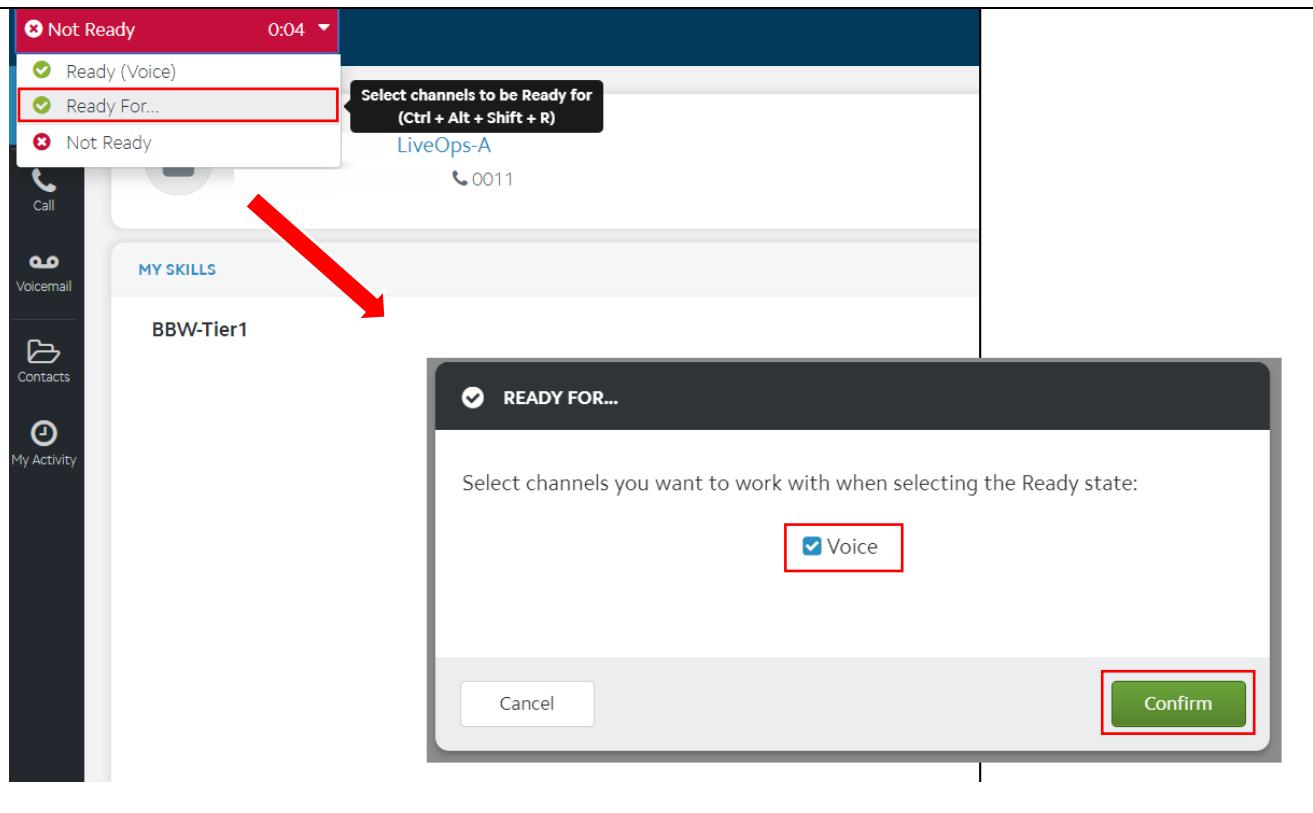
8. Once you have successfully set up and logged into Five9, you should see the following view.



Going to Ready State

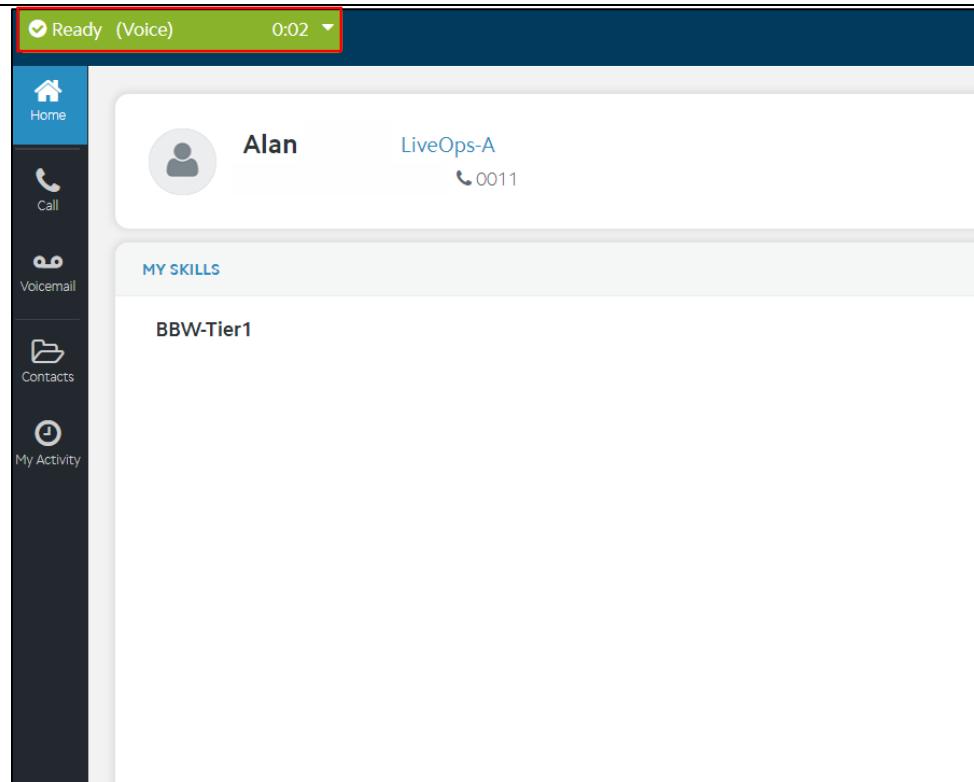
9. Once you are logged in, click the red **Not Ready** button.
10. Select the second option, **Ready For** (do not choose **Ready (Voice)**).
11. Keep **Voice** selected and click **Confirm**.

NOTE: Please use the Chrome browser when using Five9.



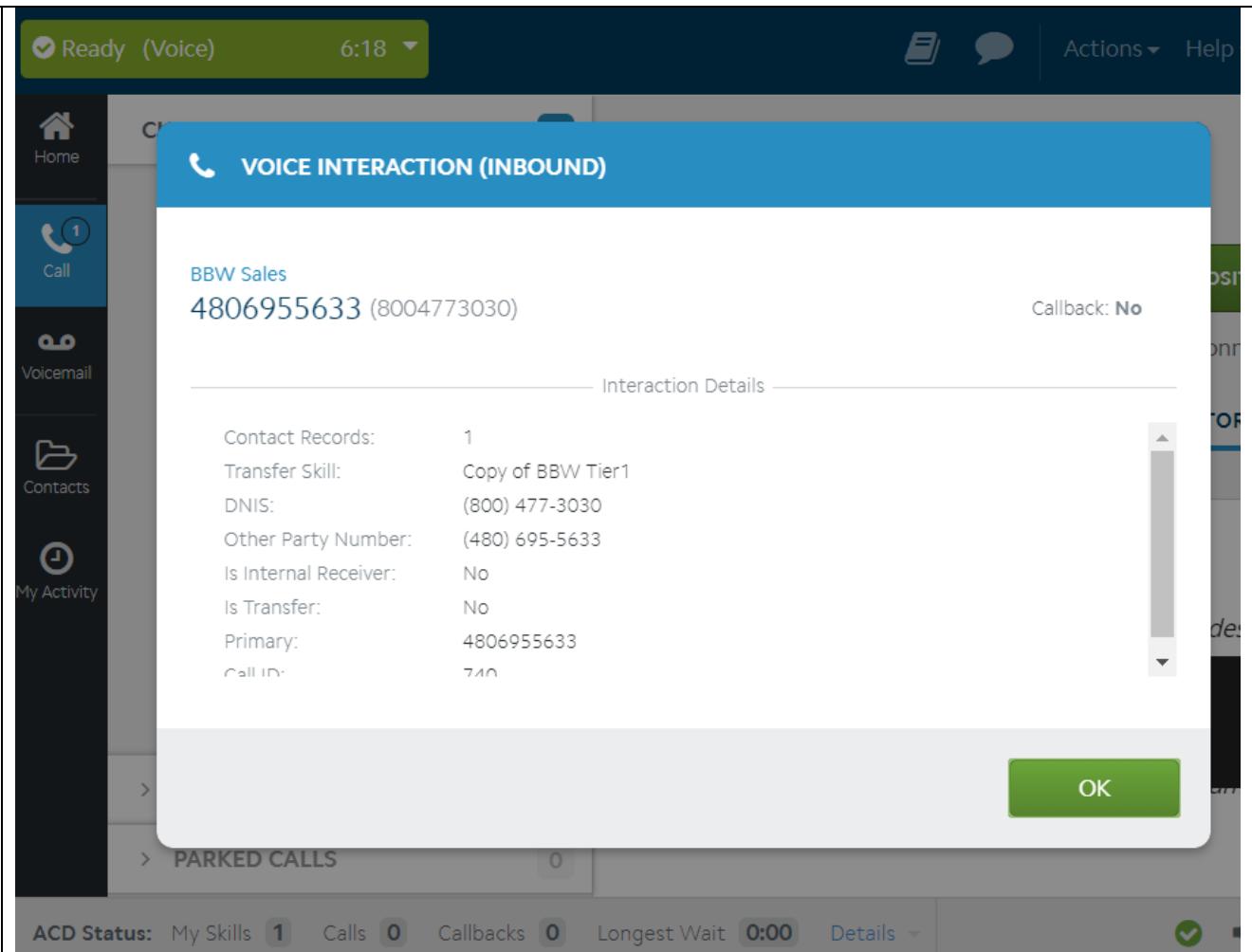
The image shows the Five9 software interface. At the top, there is a status bar with a red 'Not Ready' button, a timer (0:04), and a dropdown menu. Below the status bar, a red arrow points from the 'Not Ready' button to a dropdown menu. The dropdown menu has four options: 'Not Ready' (red box), 'Ready (Voice)' (green checkmark), 'Ready For...' (green checkmark, highlighted with a red box), and 'Not Ready' (red box). To the right of the dropdown, a tooltip says 'Select channels to be Ready for (Ctrl + Alt + Shift + R)' and 'LiveOps-A'. Below the dropdown, there is a 'Call' button, a 'Voicemail' button, a 'Contacts' button, and a 'My Activity' button. The main area is titled 'MY SKILLS' and shows 'BBW-Tier1'. A modal dialog box is open, titled 'READY FOR...', with the text 'Select channels you want to work with when selecting the Ready state:'. It contains a checked checkbox labeled 'Voice' (red box) and a 'Confirm' button (green box) at the bottom right. A 'Cancel' button is also visible.

12. The green **Ready** indicator lets you know you are ready to receive a call.



Using the soft phone and script, stop recording for credit card collection and ending the call.

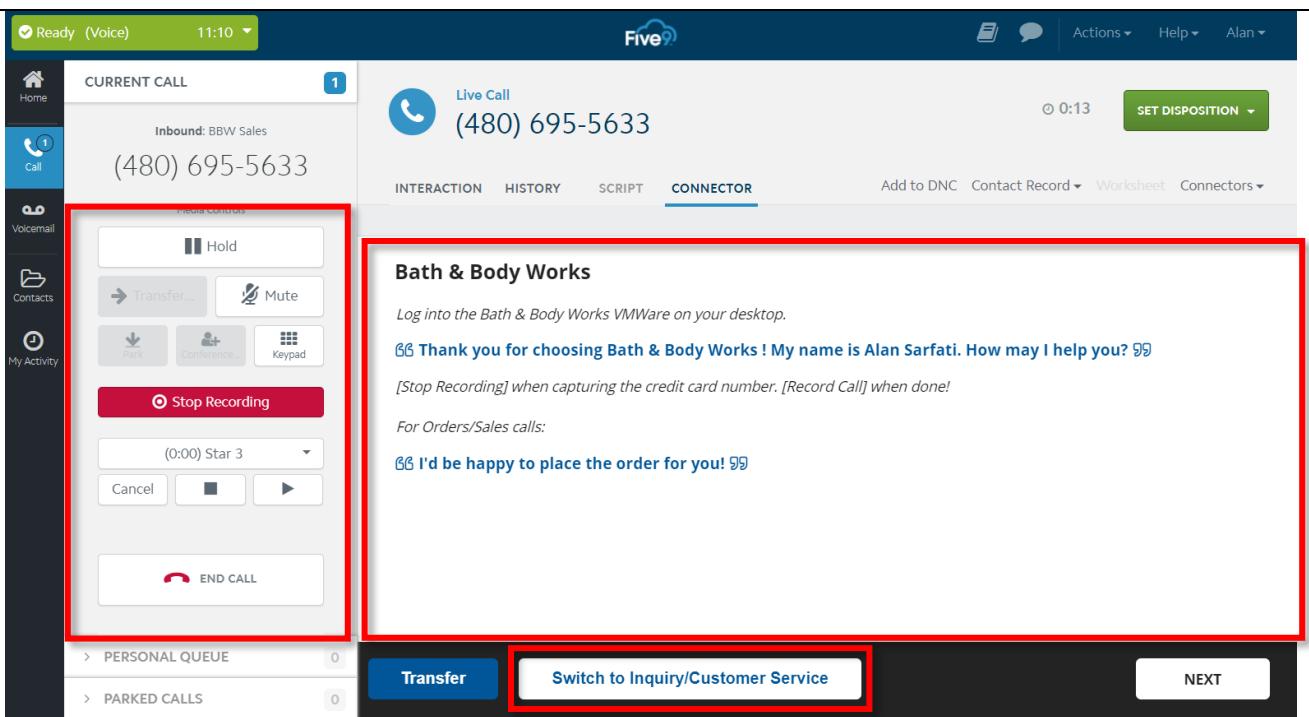
1. Once in the Ready state, you will receive a call at any time. When a call first comes in, you will see a screen pop as shown here. Click the **OK** button.



2. Here you can see the soft phone on the left and script on the right.

NOTE: There are two types of scripts – Orders/Sales and Inquiry/Customer Service.

The sample shown here is the Orders/Sales script. If you determine you need the other script, click **Switch to** button below the script.



The screenshot displays the Five9 User Guide interface. On the left, a vertical sidebar shows navigation options: Home, Call, Voicemail, Contacts, and My Activity. The main area is titled "CURRENT CALL" with the number "(480) 695-5633". A red box highlights the "Hold" button and other call control options. To the right, a "CONNECTOR" tab is selected, showing a "Live Call" with the number "(480) 695-5633" and a duration of "0:13". A red box highlights the "Bath & Body Works" script content, which includes a greeting, instructions for recording, and a "Switch to Inquiry/Customer Service" button. The bottom right corner features a "NEXT" button.

- All calls are automatically recorded from the start. It's critical to pause or stop recording when it's time to capture customer credit card numbers. At the appropriate time, click **Stop Recording**. Once you have captured the credit card number, start recording again by clicking **Record Call**.

When capturing CC#s:

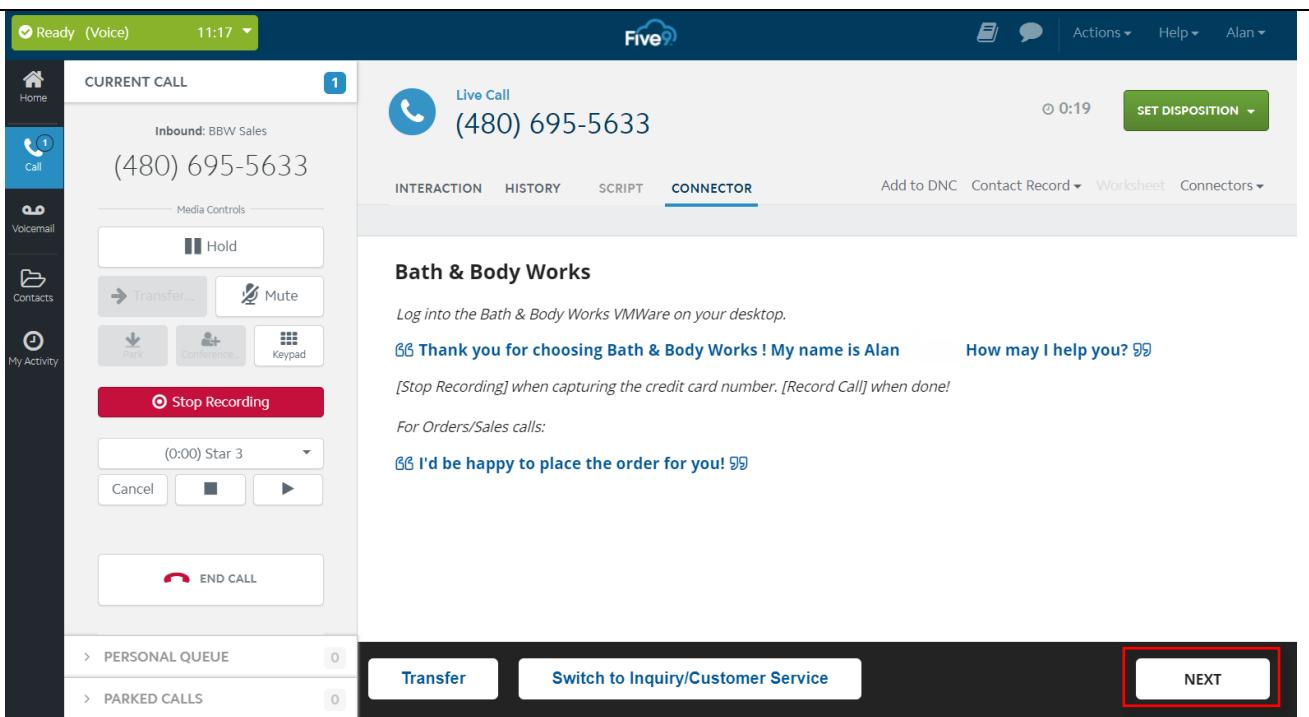
- ✓ Click **Stop Recording**
- ✓ Capture credit card number
- ✓ Click **Record Call** to restart recording.

The image displays three screenshots of the Five9 software interface, showing the 'CURRENT CALL' screen for an inbound BBW Sales call at (480) 695-5633.

- Screenshot 1 (Left):** Shows the 'Media Controls' section with a red box around the 'Stop Recording' button. The button is highlighted in red, indicating it is active.
- Screenshot 2 (Middle):** Shows a 'Bath & Body Works' interaction. A red box highlights the text '[Stop Recording] when capturing the credit card'. Below this, a blue box contains the text 'To be sure I am looking at the correct'.
- Screenshot 3 (Right):** Shows the 'Media Controls' section with a red box around the 'Record Call' button. The button is highlighted in red, indicating it is active.

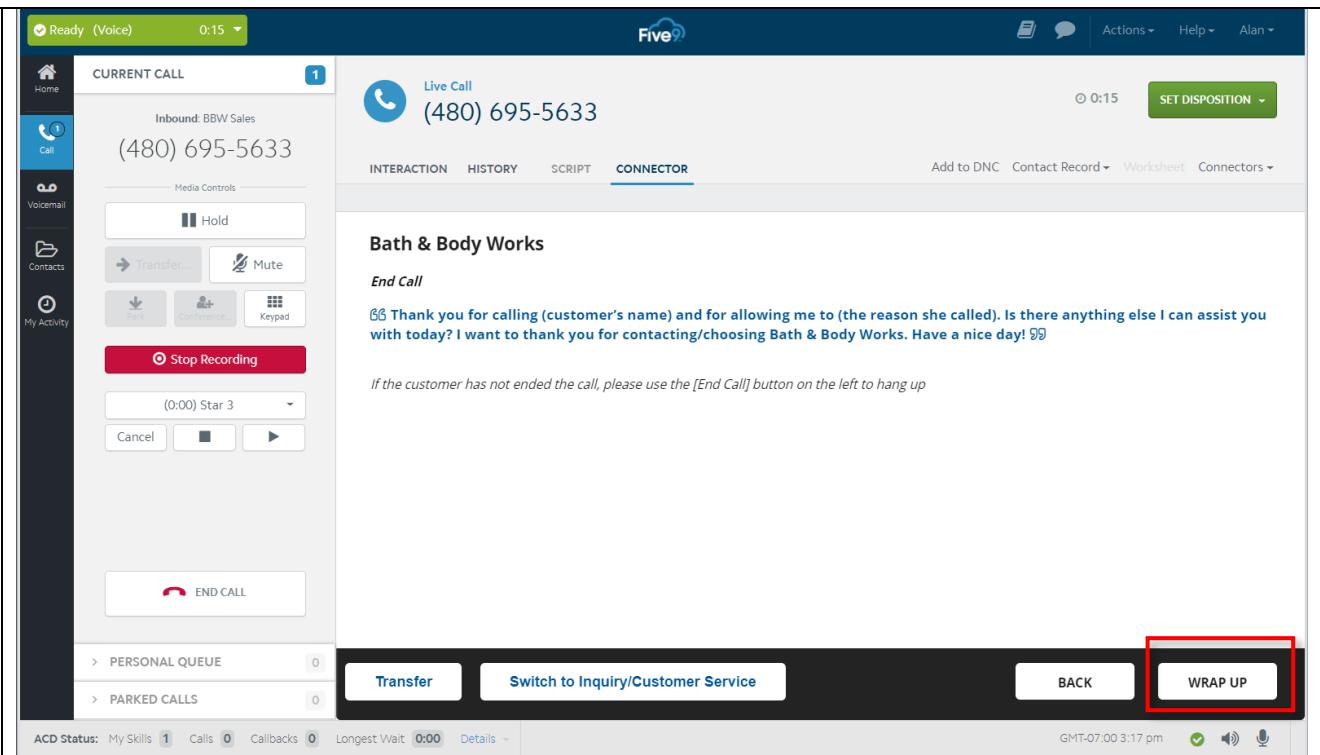
Five9 User Guide

4. You will use the **Next** button to page through the script.



The screenshot shows the Five9 desktop application interface. On the left is a sidebar with icons for Home, Call (highlighted in blue), Voicemail, Contacts, and My Activity. The main area is titled "CURRENT CALL" with "Inbound: BBW Sales" and the phone number "(480) 695-5633". Below this are "Media Controls" including Hold, Transfer, Mute, Park, Conference, and Keypad. A red box highlights the "Stop Recording" button. Below the media controls are buttons for "END CALL", "PERSONAL QUEUE" (0), and "PARKED CALLS" (0). At the bottom are buttons for "Transfer" and "Switch to Inquiry/Customer Service". A large red box highlights the "NEXT" button in the bottom right corner. The top right of the screen shows the Five9 logo, a user icon, and menu options: Actions, Help, and Alan. The top center shows the time "11:17". The top right also shows a "SET DISPOSITION" button and a timer "0:19". The bottom right of the main area shows a "Bath & Body Works" script with text: "Log into the Bath & Body Works VMWare on your desktop.", "Thank you for choosing Bath & Body Works! My name is Alan", "How may I help you?", "[Stop Recording] when capturing the credit card number. [Record Call] when done!", "For Orders/Sales calls:", and "I'd be happy to place the order for you!".

5. To end the call, click through to the end of the script to **Wrap Up** and **Disposition**. On the **End Call** screen, click **Wrap Up**.

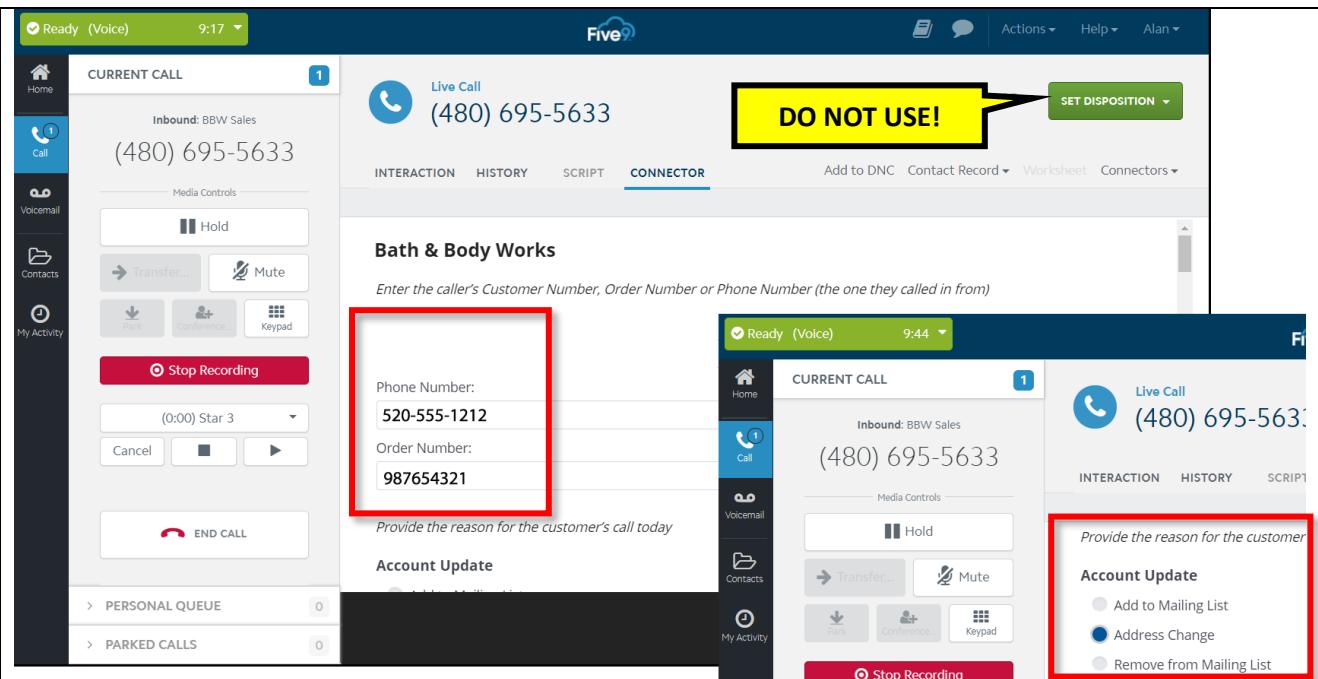


The screenshot shows the Five9 software interface with the following details:

- Top Bar:** Ready (Voice), 0:15, Five9 logo, Actions, Help, Alan.
- Left Sidebar:** Home, Call (highlighted), Voicemail, Contacts, My Activity.
- Current Call Panel:**
 - Inbound: BBW Sales, (480) 695-5633.
 - Media Controls: Hold, Transfer, Mute, Keypad, Stop Recording.
 - Call Duration: (0:00) Star 3.
 - Buttons: Cancel, End Call.
- Script Panel:** Live Call, (480) 695-5633, 0:15, SET DISPOSITION.
- Interaction Panel:** INTERACTION, HISTORY, SCRIPT, CONNECTOR (highlighted).
- Script Content:** Bath & Body Works, End Call, Thank you for calling (customer's name) and for allowing me to (the reason she called). Is there anything else I can assist you with today? I want to thank you for contacting/choosing Bath & Body Works. Have a nice day! ☺
- Bottom Buttons:** Transfer, Switch to Inquiry/Customer Service, BACK, WRAP UP (highlighted with a red box).
- ACD Status:** My Skills 1, Calls 0, Callbacks 0, Longest Wait 0:00, Details.
- Bottom Right:** GMT-07:00 3:17 pm, checkmark, speaker, microphone.

6. Enter the customer information as shown here then scroll down to select the reason for the call. In the example shown here, the call reason is "Address Change."

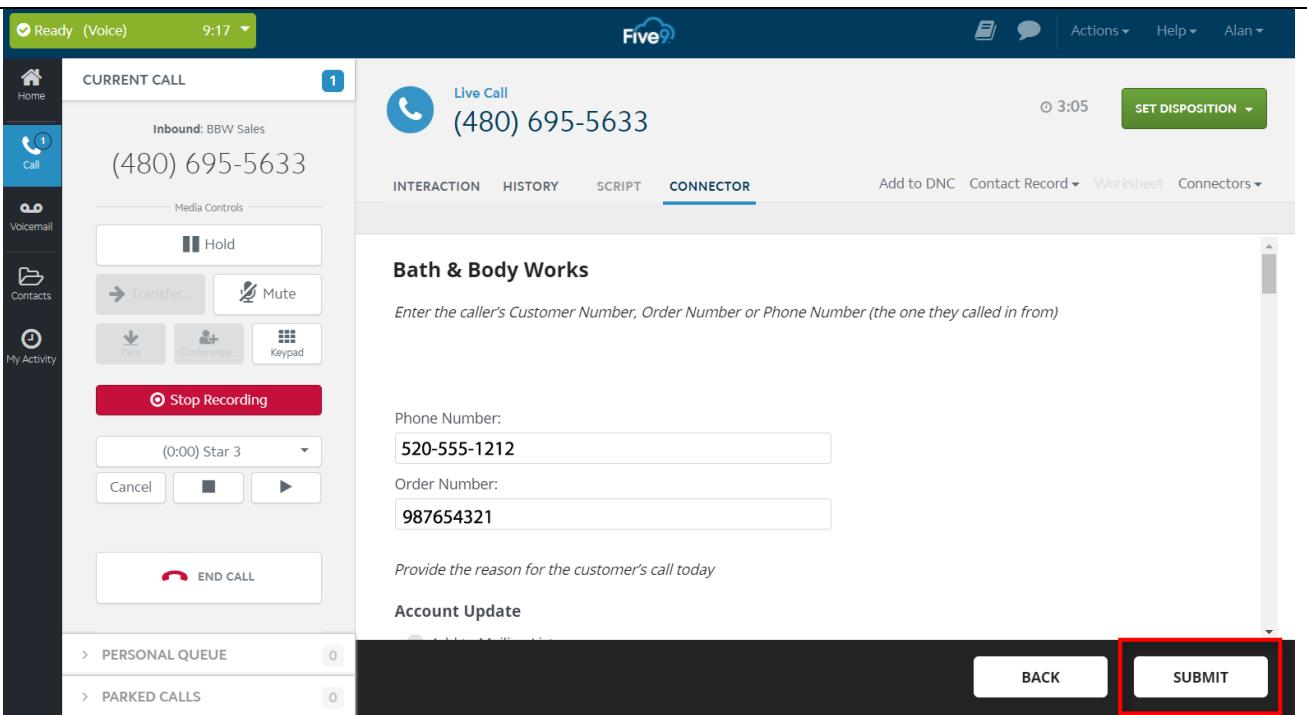
REMEMBER: DO NOT USE THE GREEN SET DISPOSITION BUTTON.



The image displays two side-by-side screenshots of the Five9 software interface. Both screenshots show a 'Live Call' for the phone number (480) 695-5633. The left screenshot shows the 'CURRENT CALL' screen with customer information: 'Inbound: BBW Sales' and the phone number '(480) 695-5633'. The right screenshot shows the 'CONNECTOR' screen for 'Bath & Body Works'. Both screenshots have a yellow box highlighting the green 'SET DISPOSITION' button in the top right corner. A red box highlights the 'Phone Number' and 'Order Number' fields in the customer information section of the right screenshot. The right screenshot also has a red box highlighting the 'Account Update' section where the 'Address Change' reason is selected.

7. After entering all needed information and selecting a reason for the call, click **Submit**. Clicking **Submit** will end the call and place you back into a ready state for your next call.

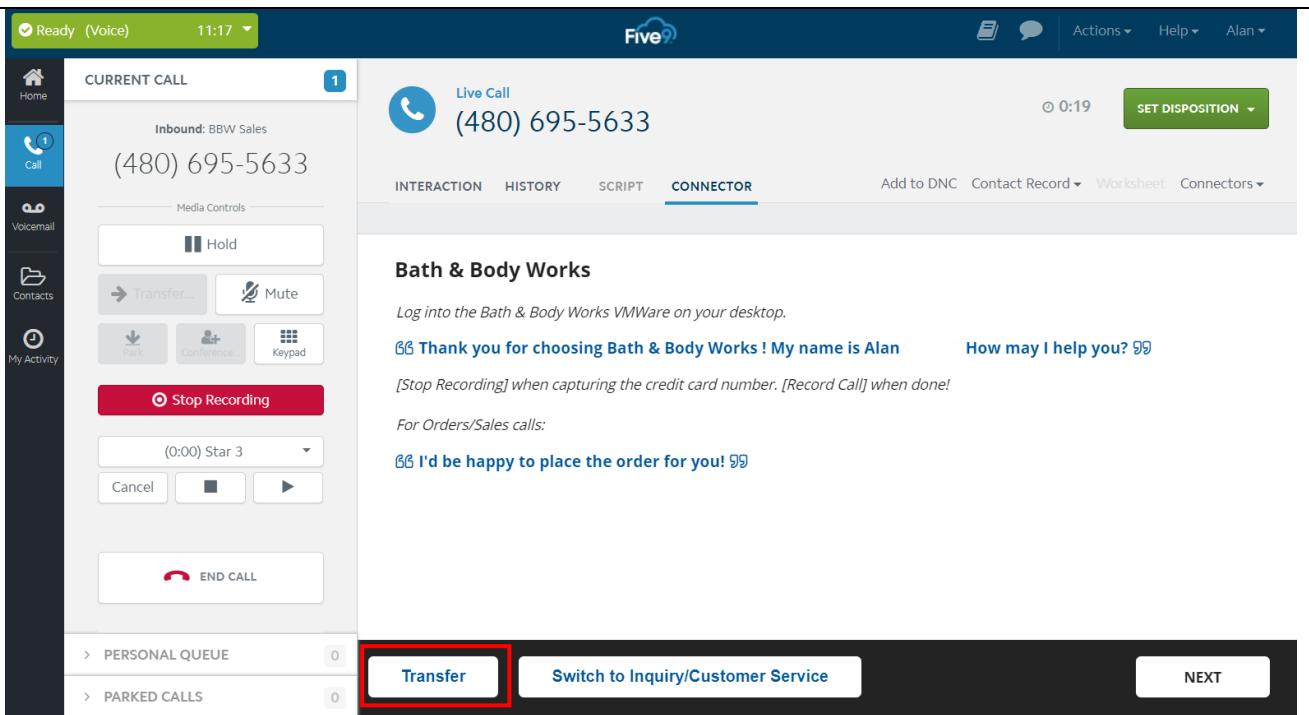
NOTE: Use the **End Call** button only if your caller has not hung prior to completing wrap up steps.



The screenshot shows the Five9 software interface during a live call. The top bar indicates the user is 'Ready (Voice)' at 9:17. The main area shows a 'CURRENT CALL' for an inbound call from 'BBW Sales' at '(480) 695-5633'. The 'CONNECTOR' tab is selected. Below the call details, there's a section for 'Bath & Body Works' with fields for 'Phone Number' (520-555-1212) and 'Order Number' (987654321). A note asks for the reason for the call. At the bottom, a black bar contains 'BACK' and 'SUBMIT' buttons, with 'SUBMIT' being highlighted with a red box.

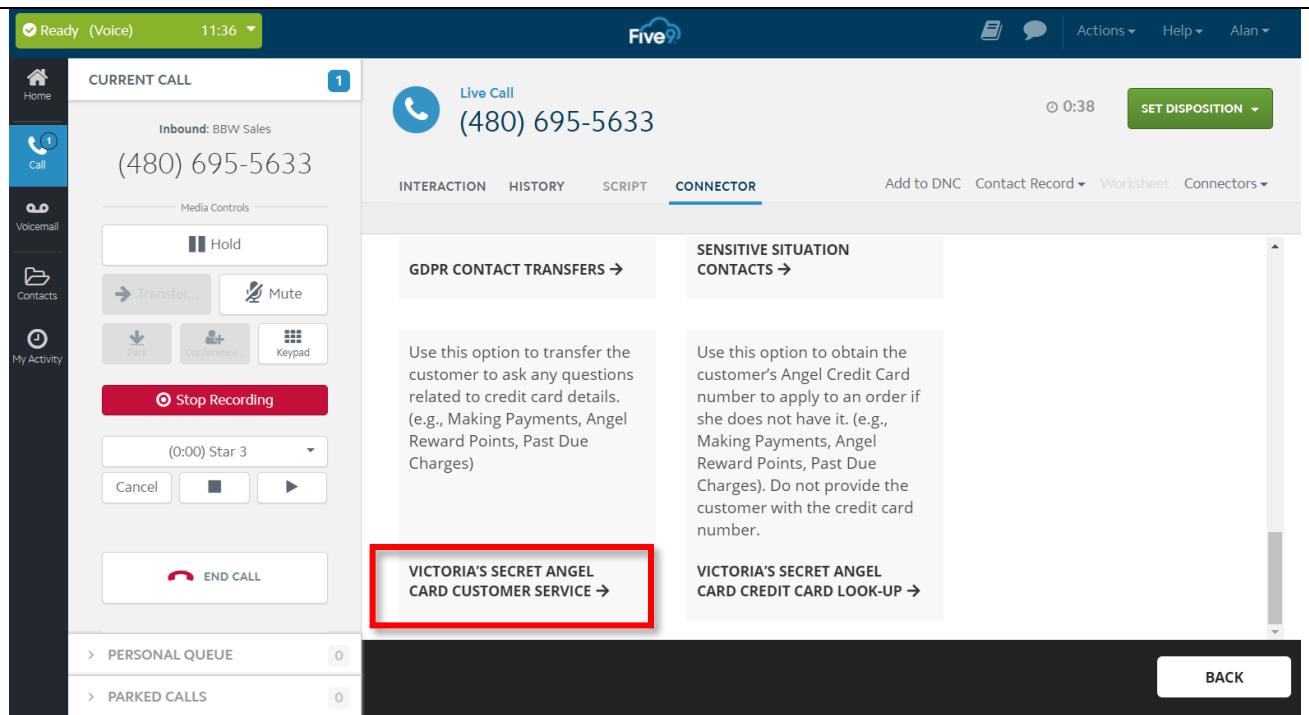
Transferring/Conferencing

1. To transfer a call or start a conference in Five9, click the **Transfer** button at the bottom of the script.



The screenshot shows the Five9 software interface. At the top, it says 'Ready (Voice)' and '11:17'. The main area is titled 'CURRENT CALL' with 'Inbound: BBW Sales' and the phone number '(480) 695-5633'. Below this are 'Media Controls' including 'Hold', 'Transfer...', 'Mute', 'Park', 'Conference', and 'Keypad'. A red box highlights the 'Transfer...' button. Other buttons include 'Stop Recording', a timer showing '(0:00) Star 3', and 'End Call'. At the bottom of the call script, there are buttons for 'PERSONAL QUEUE' (0), 'PARKED CALLS' (0), 'Transfer' (highlighted with a red box), 'Switch to Inquiry/Customer Service', and 'NEXT'.

2. Scroll through the window to find the transfer/conference type you need to perform. In the sample here, **Victoria's Secret Angel Card Customer Service** is selected.



The screenshot shows the Five9 software interface with the 'CONNECTOR' tab selected. On the left, there is a sidebar with icons for Home, Call, Voicemail, Contacts, and My Activity. The main area shows a 'CURRENT CALL' window for an inbound BBW Sales call from (480) 695-5633. Below this, there are sections for 'GDPR CONTACT TRANSFERS' and 'SENSITIVE SITUATION CONTACTS'. The 'GDPR CONTACT TRANSFERS' section contains a link to 'VICTORIA'S SECRET ANGEL CARD CUSTOMER SERVICE' (which is highlighted with a red box). The 'SENSITIVE SITUATION CONTACTS' section contains a link to 'VICTORIA'S SECRET ANGEL CARD CREDIT CARD LOOK-UP'. At the bottom right, there is a 'BACK' button.

- Once you have selected the transfer type, your caller is instantly put on hold. Use the buttons shown here as needed.

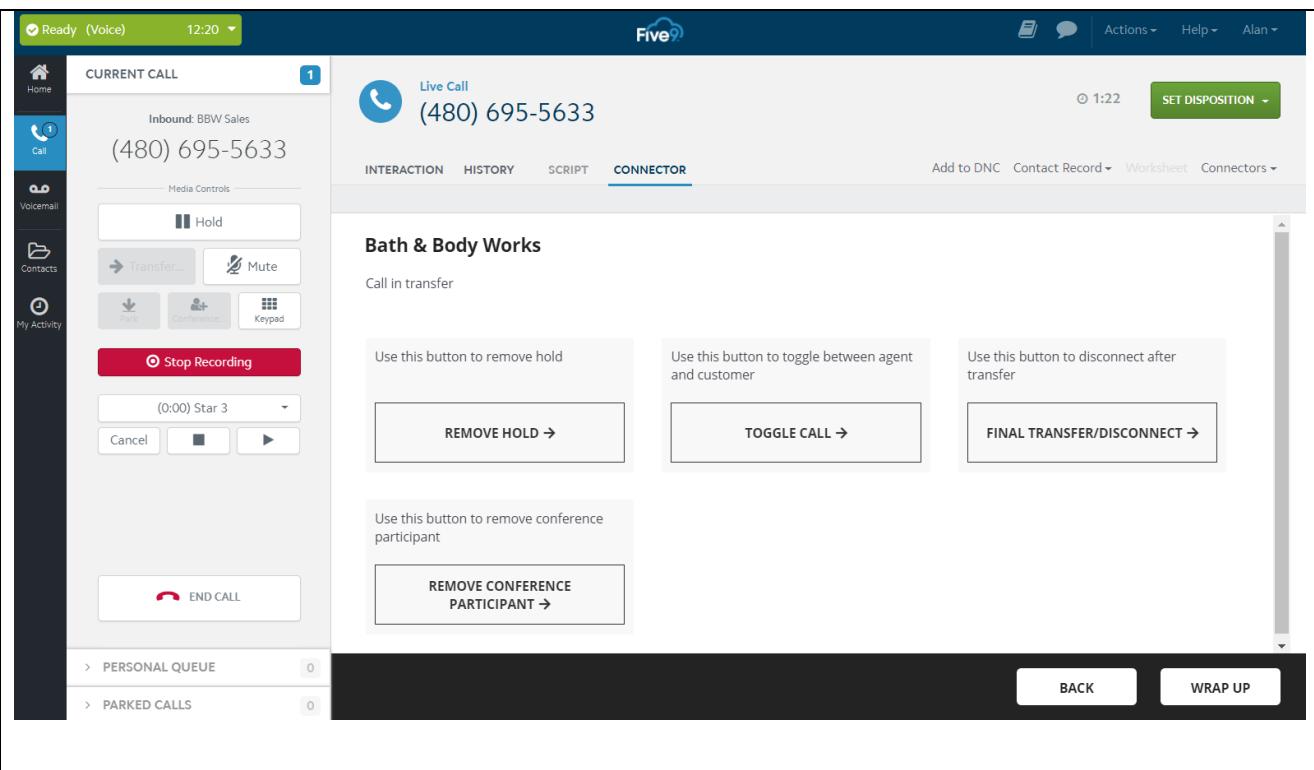
Transfer/Conference Options:

REMOVE HOLD: Use this button to remove hold and bring your caller into the conference.

TOGGLE CALL: Use this button to toggle between agent and customer.

FINAL TRANSFER/DISCONNECT: Use this button to disconnect after transfer and/or leave the conference.

REMOVE CONFERENCE PARTICIPANT: Use this button to remove conference participant (agent).



3. Once you have selected the transfer type, your caller is instantly put on hold. Use the buttons shown here as needed.

Transfer/Conference Options:

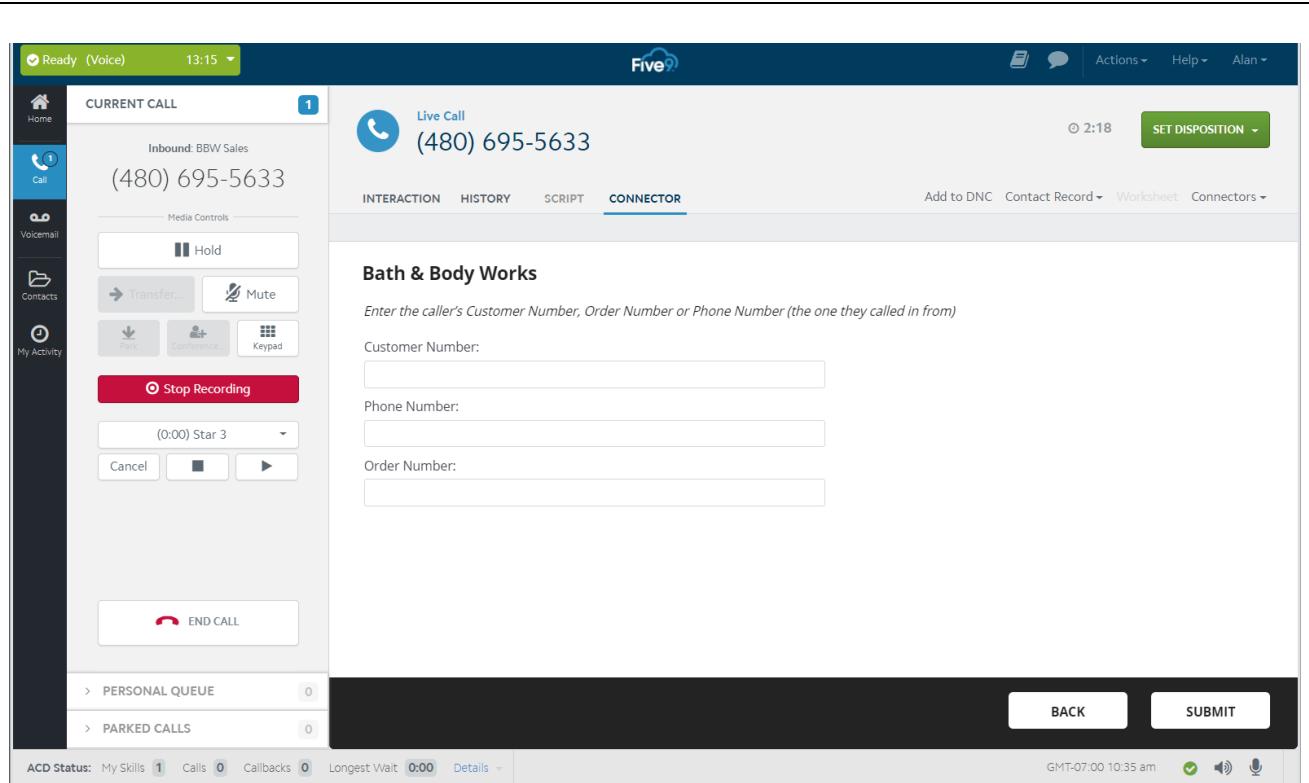
REMOVE HOLD: Use this button to remove hold and bring your caller into the conference.

TOGGLE CALL: Use this button to toggle between agent and customer.

FINAL TRANSFER/DISCONNECT: Use this button to disconnect after transfer and/or leave the conference.

REMOVE CONFERENCE PARTICIPANT: Use this button to remove conference participant (agent).

4. After completing the transfer, click **Wrap Up**. Enter needed information and click **Submit**.



The screenshot shows the Five9 software interface during a live call. The call is currently on hold. The interface includes a sidebar with navigation links like Home, Call, Voicemail, Contacts, and My Activity. The main screen shows the current call details, media controls (Hold, Transfer, Mute, Park, Conference, Keypad), and a script section. The 'CONNECTOR' tab is selected, showing fields for Customer Number, Phone Number, and Order Number. At the bottom, there are 'BACK' and 'SUBMIT' buttons.