

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.](#)

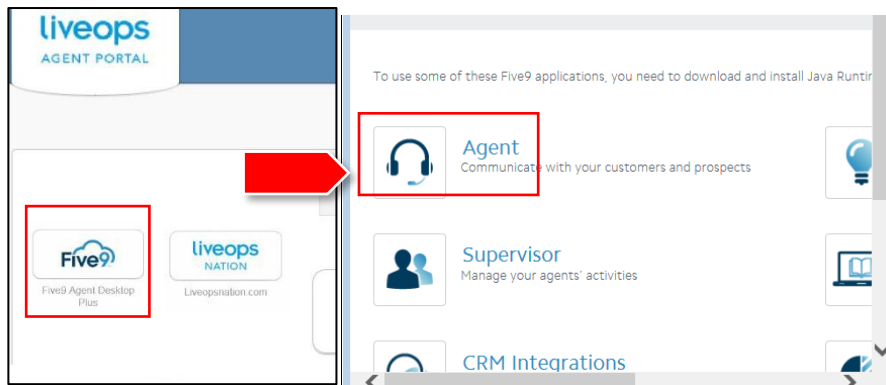
[Transferring Calls](#)



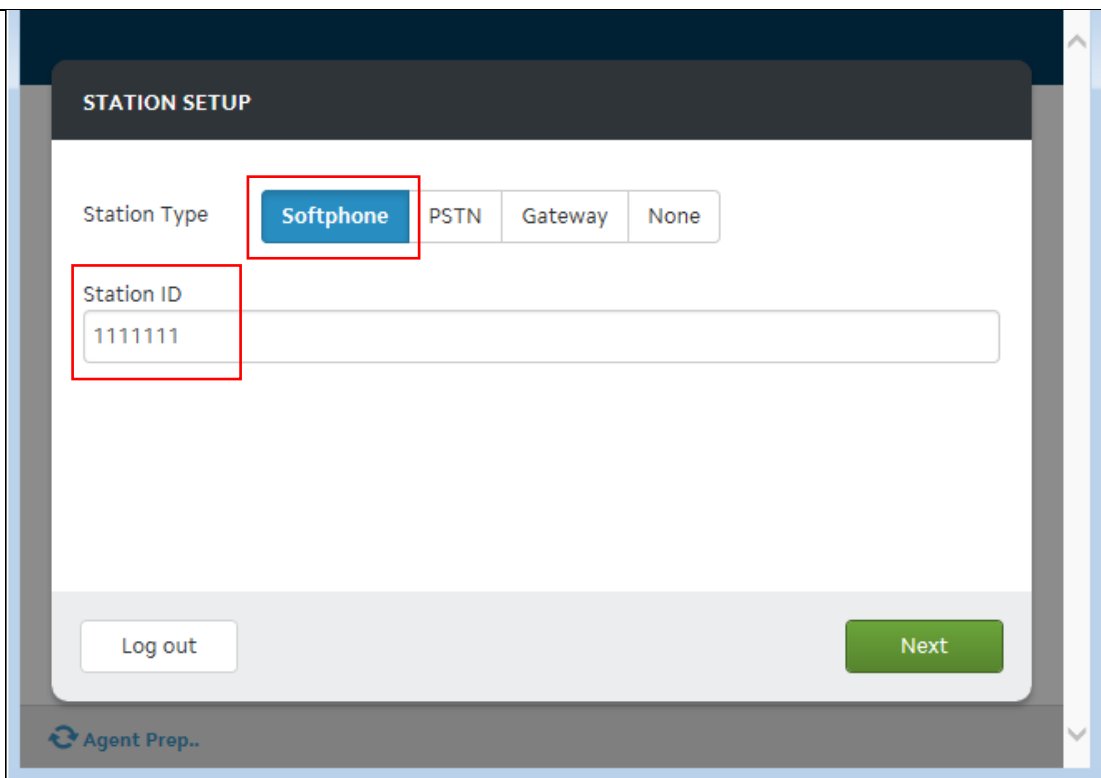
### Logging in for the first time.

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.

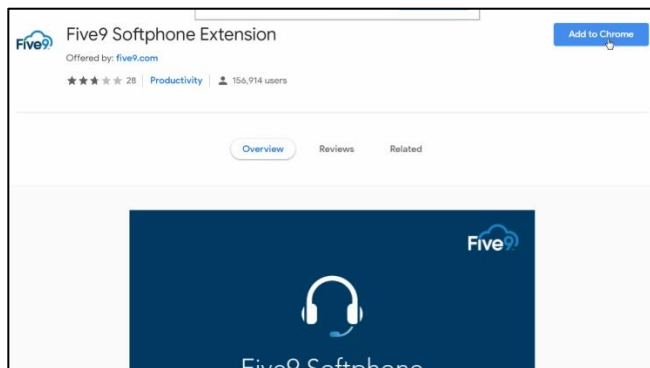


3. Keep **Softphone** selected and enter your **Station ID** (provided by your facilitator).
4. Click **Next**.

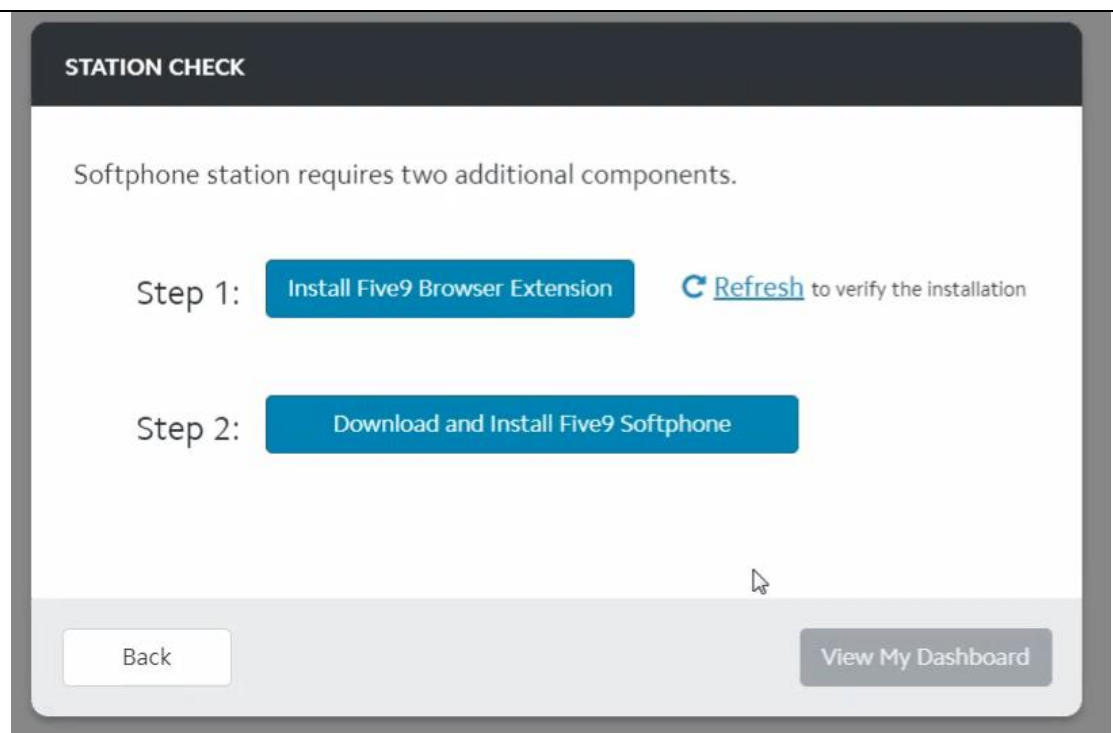


5. When you see the prompts as shown on the right, complete steps one and two.

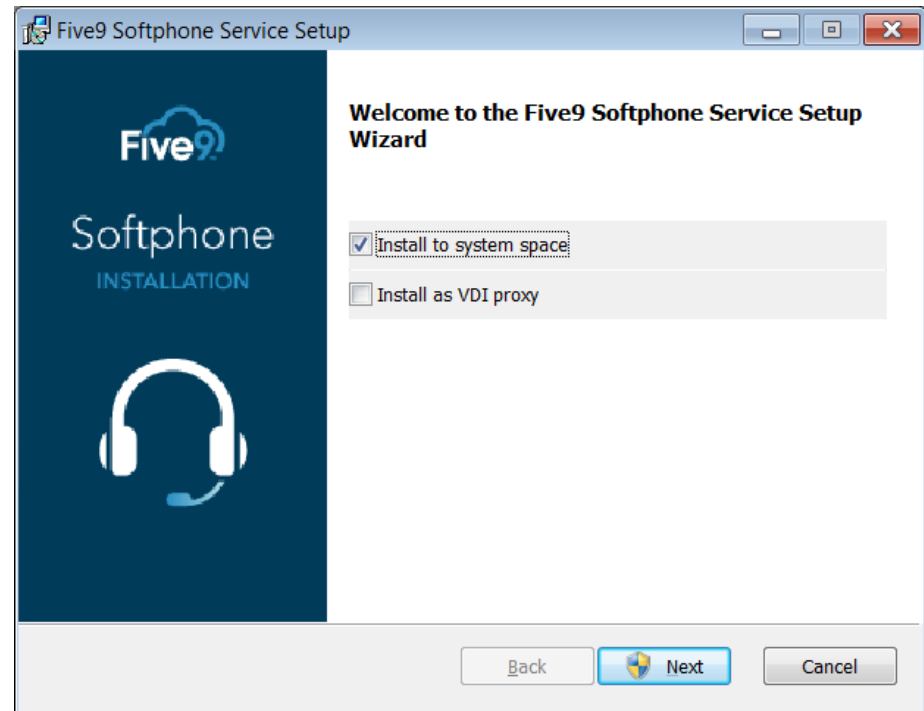
You may need to install the Five9 extension, just follow the prompts. Click **Refresh** after installing.



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



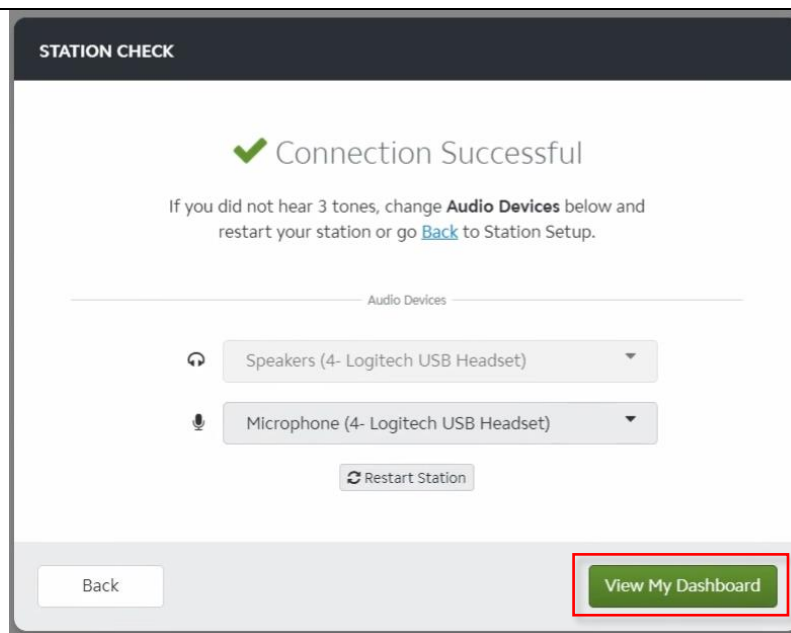
6. After clicking Step 2 (see previous screen), you will see the following pop-up. Select **Install to system space** then click **Next**.



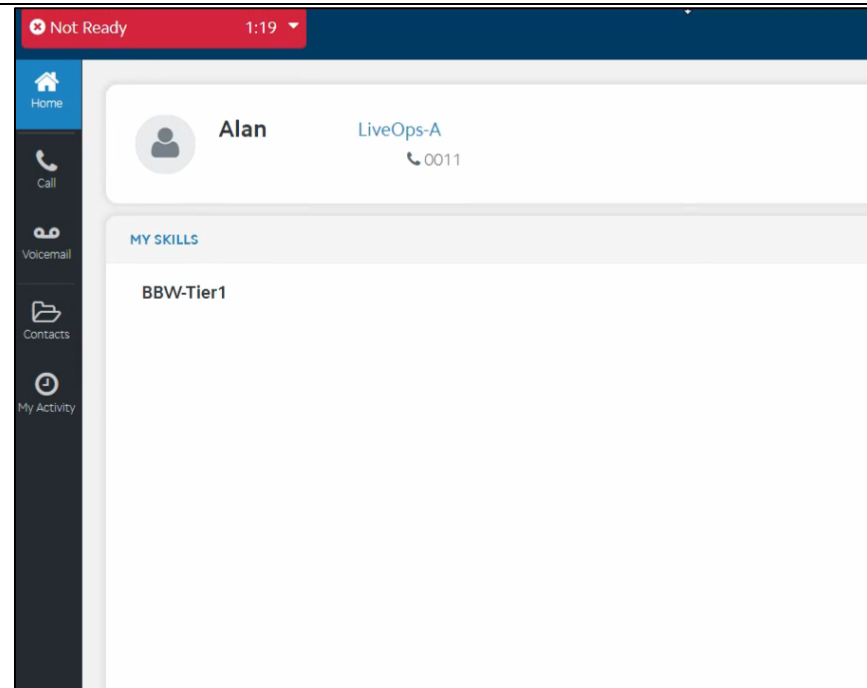
7. Once you have completed all needed downloads and installs you will see the following screen. Click **View My Dashboard**.

**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.



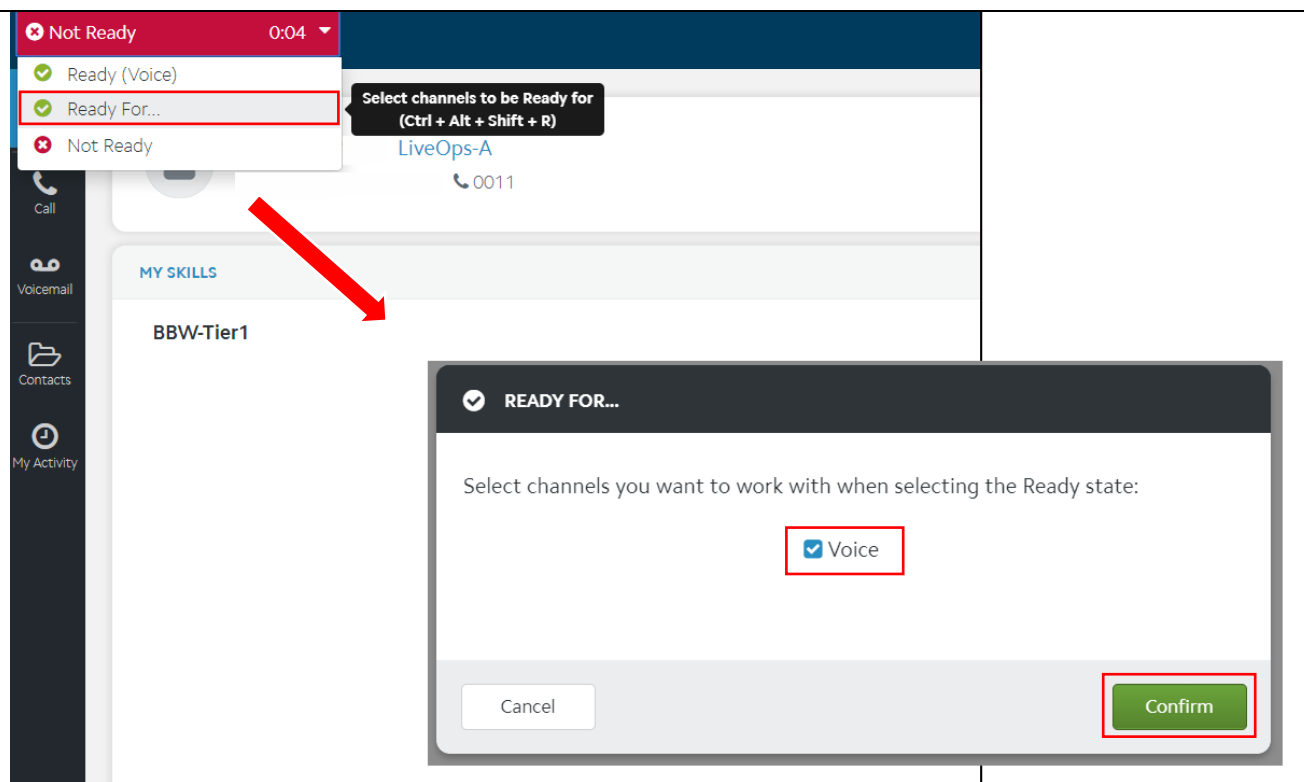
8. Once you have successfully set up and logged into Five9, you should see the following view.



### Going to Ready State

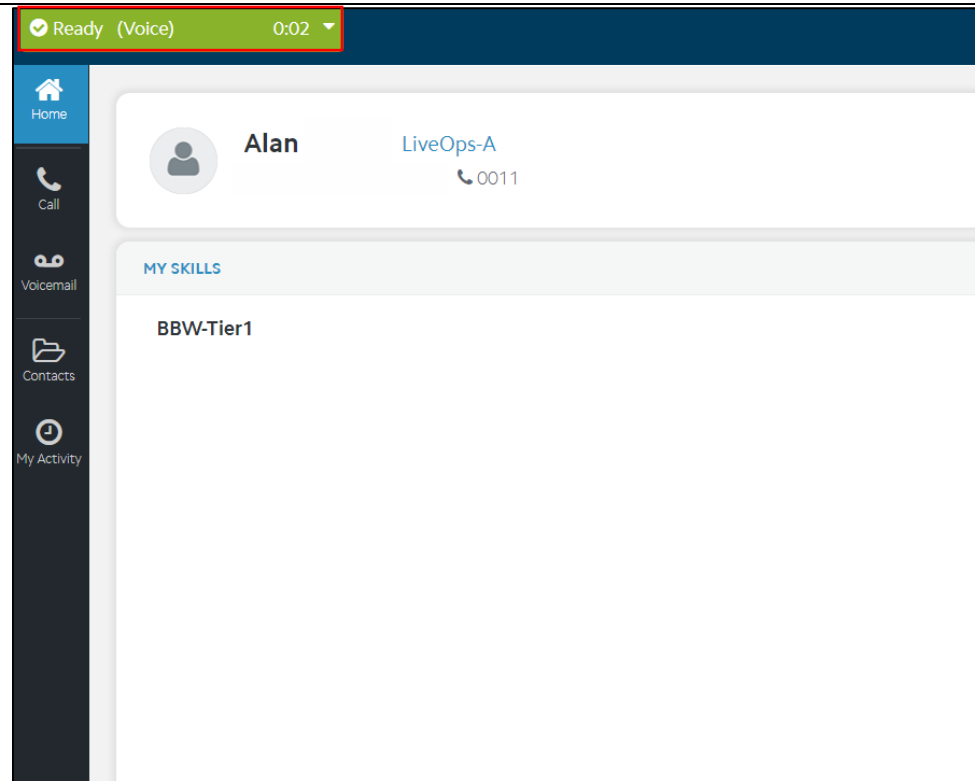
9. Once you are logged in, click the red **Not Ready** button.
10. Select the second option, **Ready For** (***do not*** choose **Ready (Voice)**).
11. Keep **Voice** selected and click **Confirm**.

**NOTE:** Please use the Chrome browser when using Five9.



The screenshot displays the Five9 user interface. On the left is a dark sidebar with icons for Call, Voicemail, Contacts, and My Activity. The main area shows a status bar at the top with a red 'Not Ready' button and a timer at 0:04. Below this is a dropdown menu with three options: 'Ready (Voice)' (green checkmark), 'Ready For...' (green checkmark, highlighted with a red box), and 'Not Ready' (red X). A tooltip above the dropdown reads 'Select channels to be Ready for (Ctrl + Alt + Shift + R)'. Below the dropdown, the 'MY SKILLS' section shows 'BBW-Tier1'. A red arrow points from the 'Ready For...' option to a modal dialog box titled 'READY FOR...'. The dialog box contains the text 'Select channels you want to work with when selecting the Ready state:' and a single checkbox labeled 'Voice' which is checked and highlighted with a red box. At the bottom of the dialog are 'Cancel' and 'Confirm' buttons, with the 'Confirm' button highlighted with a red box.

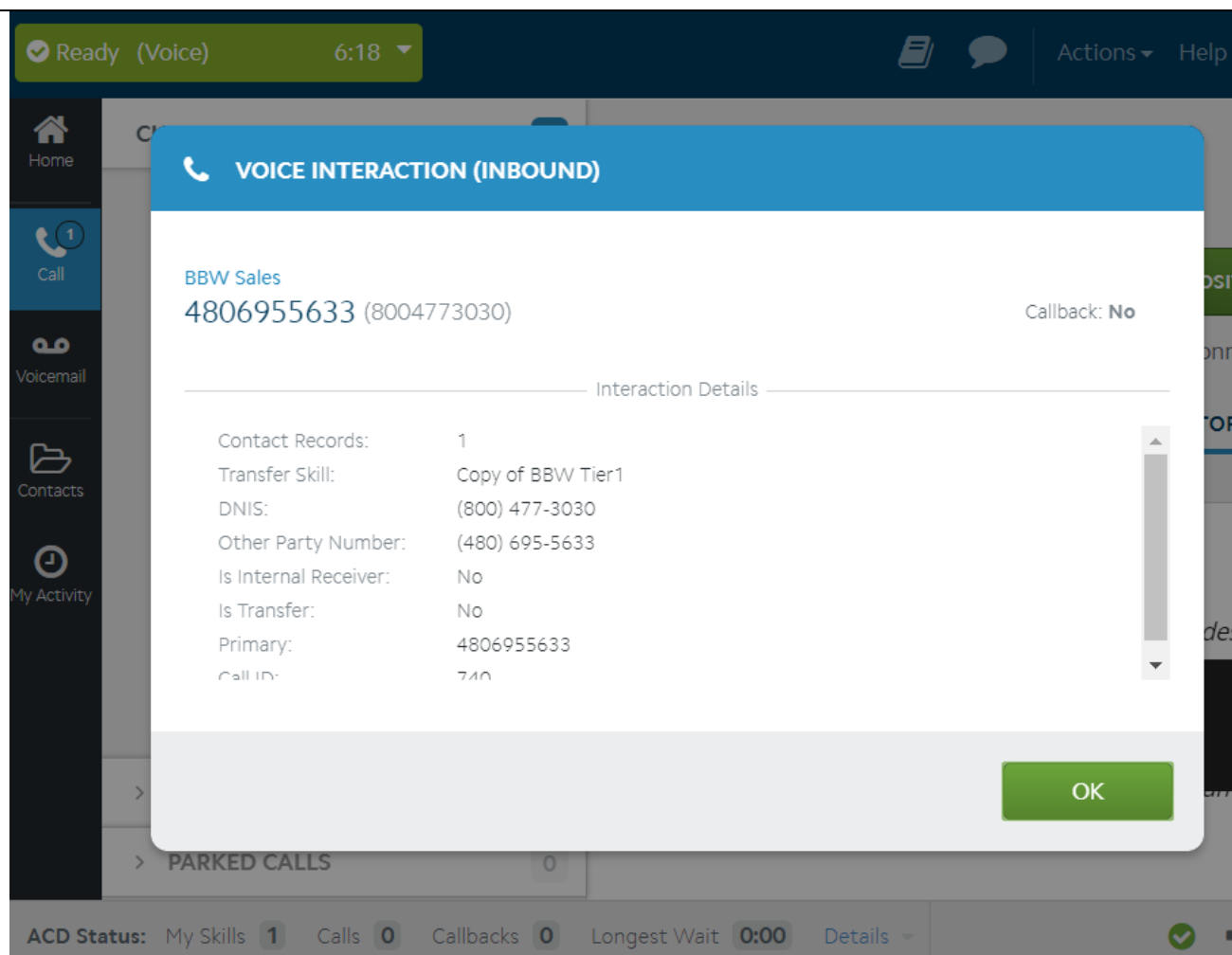
12. The green **Ready** indicator lets you know you are ready to receive a call.





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 LiveOps interface during a live call. The top status bar shows 'Ready (Voice)' and the time '11:10'. The main header includes the 'Five9' logo and user options like 'Actions', 'Help', and 'Alan'. The central area is divided into two main sections: a soft phone on the left and a script panel on the right. The soft phone, titled 'CURRENT CALL', shows an inbound call from 'BBW Sales' with the number '(480) 695-5633'. It features a 'Hold' button, 'Transfer...' and 'Mute' buttons, a 'Stop Recording' button, a '(0:00) Star 3' dropdown, and an 'END CALL' button. The script panel, titled 'Bath & Body Works', contains a welcome message, a thank you message, and a script for orders/sales calls. At the bottom, there are buttons for 'Transfer', 'Switch to Inquiry/Customer Service', and 'NEXT'. The 'Switch to Inquiry/Customer Service' button is highlighted with a red box.

3. 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 two screenshots of the Five9 Live Call interface. The left screenshot shows the 'CURRENT CALL' screen with the 'Stop Recording' button highlighted in a red box. The right screenshot shows the same screen with the 'Record Call' button highlighted in a red box. Both screenshots show a call from '(480) 695-5633' and a transcript of the conversation.

**Left Screenshot (8:29):**

- Top bar: Ready (Voice) 8:29
- Call status: Inbound: BBW Sales (480) 695-5633
- Media Controls: Hold, Transfer, Mute, Park, Conference, Keypad
- Red box highlights: **Stop Recording** button
- Transcript: Bath & Body Works. Verification is required when providing order an order or any Loyalty App Inquiry. When sharing order/Loyalty App information or [Stop Recording] when capturing the credit card Complete Order Steps. You will receive an email confirmation receive an email confirmation, with the order ships. You can expect to receive yo
- Bottom bar: PERSONAL QUEUE 0, PARKED CALLS 0

**Right Screenshot (8:48):**

- Top bar: Ready (Voice) 8:48
- Call status: Inbound: BBW Sales (480) 695-5633
- Media Controls: Hold, Transfer, Mute, Park, Conference, Keypad
- Red box highlights: **Record Call** button
- Transcript: Bat
- Bottom bar: END CALL

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

The screenshot displays the Five9 LiveOps interface during a live call. The top navigation bar includes a status indicator 'Ready (Voice)' and a timer '11:17'. The main header shows the 'Five9' logo and user options 'Actions', 'Help', and 'Alan'. The left sidebar contains navigation icons for Home, Call, Voicemail, Contacts, and My Activity. The central panel is titled 'CURRENT CALL' and shows an inbound call from 'BBW Sales' with the number '(480) 695-5633'. Below this are media controls including 'Hold', 'Transfer...', 'Mute', 'Park', 'Conference', and 'Keypad'. A red 'Stop Recording' button is also present. The bottom of the central panel shows 'PERSONAL QUEUE' and 'PARKED CALLS' with counts of 0. The right panel displays the 'Live Call' information and a 'SET DISPOSITION' button. Below this is a script editor for 'Bath & Body Works' with the following 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:
   
I'd be happy to place the order for you!
   
At the bottom of the interface, there are three buttons: 'Transfer', 'Switch to Inquiry/Customer Service', and 'NEXT'. The 'NEXT' button is highlighted with a red rectangular box.

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 displays the Five9 Live Call interface. At the top, a status bar shows 'Ready (Voice)' and a timer of '0:15'. The main header includes the 'Five9' logo and navigation links for 'Actions', 'Help', and 'Alan'. The left sidebar contains icons for 'Home', 'Call', 'Voicemail', 'Contacts', and 'My Activity'. The central panel is titled 'CURRENT CALL' and shows 'Inbound: BBW Sales' with the phone number '(480) 695-5633'. Below this are media controls including 'Hold', 'Transfer...', 'Mute', 'Park', 'Conference', and 'Keypad'. A red 'Stop Recording' button is also present. The 'End Call' section shows a '(0:00) Star 3' rating with 'Cancel', 'Star', and 'Play' buttons. At the bottom of the central panel is an 'END CALL' button. The right panel displays the 'Live Call' header with the phone number '(480) 695-5633' and a 'SET DISPOSITION' button. Below this are tabs for 'INTERACTION', 'HISTORY', 'SCRIPT', and 'CONNECTOR'. The 'CONNECTOR' tab is active, showing a script for 'Bath & Body Works' with an 'End Call' section containing a thank-you message and a note about using the 'End Call' button. At the bottom of the interface, a row of buttons includes 'Transfer', 'Switch to Inquiry/Customer Service', 'BACK', and 'WRAP UP', which is highlighted with a red box. The bottom status bar shows 'ACD Status: My Skills 1 Calls 0 Callbacks 0 Longest Wait 0:00 Details' and the time 'GMT-07:00 3:17 pm'.

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 screenshots of the Five9 Live Call interface. The left screenshot shows the 'CONNECTOR' tab with a red box highlighting the 'Phone Number' and 'Order Number' fields. The right screenshot shows the 'SET DISPOSITION' dropdown menu with a red box highlighting the 'Address Change' option.

**Left Screenshot:** The interface shows a 'CURRENT CALL' for 'Inbound: BBW Sales' with the number '(480) 695-5633'. The 'CONNECTOR' tab is active, showing fields for 'Phone Number: 520-555-1212' and 'Order Number: 987654321'. A red box highlights these fields. Below the fields is a section titled 'Bath & Body Works' with a prompt to 'Enter the caller's Customer Number, Order Number or Phone Number (the one they called in from)'. Below that is a section titled 'Account Update' with a prompt to 'Provide the reason for the customer's call today'.

**Right Screenshot:** The interface shows the same 'CURRENT CALL' for 'Inbound: BBW Sales' with the number '(480) 695-5633'. The 'SET DISPOSITION' dropdown menu is open, showing options: 'Add to Mailing List', 'Address Change' (selected), and 'Remove from Mailing List'. A red box highlights the 'Address Change' option. A yellow callout box with the text 'DO NOT USE!' points to the 'SET DISPOSITION' button.

- 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 displays the Five9 Live Call interface. On the left is a sidebar with navigation icons for Home, Call, Voicemail, Contacts, and My Activity. The main area is divided into two panels. The left panel, titled 'CURRENT CALL', shows an inbound call from 'BBW Sales' with the number '(480) 695-5633'. It includes media controls like Hold, Transfer, Mute, Park, Conference, and Keypad, along with a 'Stop Recording' button and a timer '(0:00) Star 3'. At the bottom of this panel are buttons for 'PERSONAL QUEUE' and 'PARKED CALLS'. The right panel, titled 'Live Call (480) 695-5633', has a 'SET DISPOSITION' button and tabs for INTERACTION, HISTORY, SCRIPT, and CONNECTOR. The 'CONNECTOR' tab is active, showing a form for 'Bath & Body Works'. The form includes a prompt to enter the caller's information, fields for 'Phone Number' (520-555-1212) and 'Order Number' (987654321), a text area for the reason for the call, and an 'Account Update' section. At the bottom right, there are 'BACK' and 'SUBMIT' buttons, with the 'SUBMIT' button highlighted by a red rectangle.

## 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 displays the Five9 user interface during a live call. At the top, a status bar shows 'Ready (Voice)' and the time '11:17'. The main header includes the 'Five9' logo and navigation links for 'Actions', 'Help', and 'Alan'. The left sidebar contains icons for 'Home', 'Call', 'Voicemail', 'Contacts', and 'My Activity'. The central panel is titled 'CURRENT CALL' and shows an inbound call from 'BBW Sales' with the number '(480) 695-5633'. Below the call information are media controls: 'Hold', 'Transfer...', 'Mute', 'Park', 'Conference', and 'Keypad'. A red 'Stop Recording' button is also visible. The script area on the right is titled 'Bath & Body Works' and contains the following 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!'. At the bottom of the interface, there are three buttons: '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 LiveOps interface during a live call. The top status bar indicates the user is 'Ready (Voice)' at 11:36. The main workspace displays call details for an inbound call from 'BBW Sales' with the number '(480) 695-5633'. The 'CONNECTOR' tab is active, showing two sections: 'GDPR CONTACT TRANSFERS' and 'SENSITIVE SITUATION CONTACTS'. The 'GDPR CONTACT TRANSFERS' section contains a description and a red-bordered button labeled 'VICTORIA'S SECRET ANGEL CARD CUSTOMER SERVICE'. The 'SENSITIVE SITUATION CONTACTS' section contains a description and a button labeled 'VICTORIA'S SECRET ANGEL CARD CREDIT CARD LOOK-UP'. A 'BACK' button is visible in the bottom right corner.

- Once you have selected the transfer type, your caller is instantly put on hold. Use the buttons show 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).

The screenshot displays the Five9 LiveOps interface during a live call. The top bar shows the agent's status as 'Ready (Voice)' and the time as '12:20'. The call is identified as 'Inbound: BBW Sales' with the number '(480) 695-5633'. The interface is divided into several sections:

- Left Sidebar:** Contains navigation icons for Home, Call, Voicemail, Contacts, and My Activity.
- Call Control Panel:** Located in the center-left, it includes buttons for 'Hold', 'Transfer...', 'Mute', 'End', 'Conference', and 'Keypad'. There is also a 'Stop Recording' button and a timer showing '(0:00) Star 3'.
- Main Workspace:** Displays the call details and a list of buttons for managing the call: 'REMOVE HOLD →', 'TOGGLE CALL →', 'FINAL TRANSFER/DISCONNECT →', and 'REMOVE CONFERENCE PARTICIPANT →'. Each button has a corresponding instruction above it.
- Bottom Bar:** Includes 'BACK' and 'WRAP UP' buttons.

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

The screenshot shows the Five9 LiveOps interface during a call wrap-up. The top navigation bar includes a status bar (Ready, Voice, 13:15), the Five9 logo, and user options (Actions, Help, Alan). A left sidebar contains navigation icons for Home, Call, Voicemail, Contacts, and My Activity. The main interface is divided into three sections:

- CURRENT CALL:** Displays 'Inbound: BBW Sales' and the phone number '(480) 695-5633'. It includes media controls (Hold, Transfer, Mute, End, Conference, Keypad), a 'Stop Recording' button, a timer '(0:00) Star 3', and an 'END CALL' button. Below this are sections for 'PERSONAL QUEUE' and 'PARKED CALLS', both showing a count of 0.
- Live Call:** Shows the phone number '(480) 695-5633' and a 'SET DISPOSITION' button. It has tabs for INTERACTION, HISTORY, SCRIPT, and CONNECTOR. The CONNECTOR tab is active, showing a form for 'Bath & Body Works' with fields for Customer Number, Phone Number, and Order Number. A note below the fields reads: 'Enter the caller's Customer Number, Order Number or Phone Number (the one they called in from)'.
- Footer:** Displays 'ACD Status: My Skills 1 Calls 0 Callbacks 0 Longest Wait 0:00 Details', the time 'GMT-07:00 10:35 am', and icons for status, audio, and video.

At the bottom right of the main interface, there are two buttons: 'BACK' and 'SUBMIT'.