# Five9 User Guide

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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](#)

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| **Logging in for the first time.**<br><br>1. Go to your Liveops Okta page and click the Five9 icon.<br>2. Click **Agent.**<br><br>NOTE: Please use the Chrome browser when installing and using Five9.<br><br>chrome |  |
| 3. Keep **Softphone** selected and enter your **Station ID** (provided by your facilitator).<br>4. Click **Next**. |  |
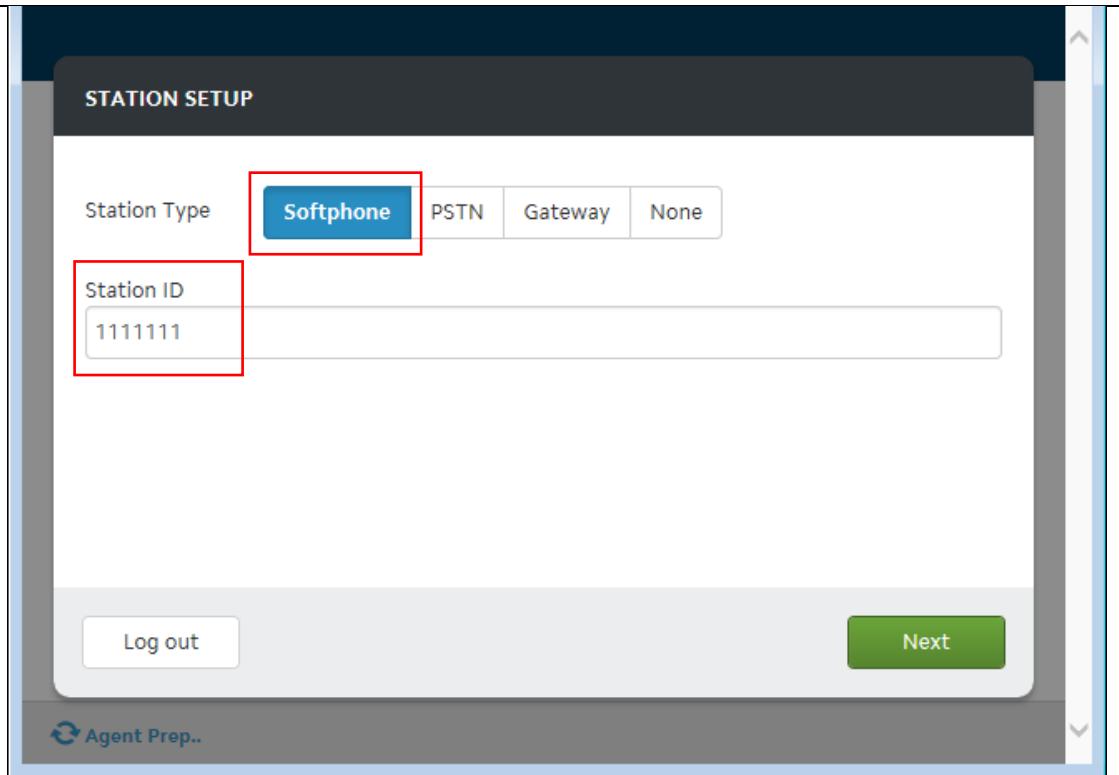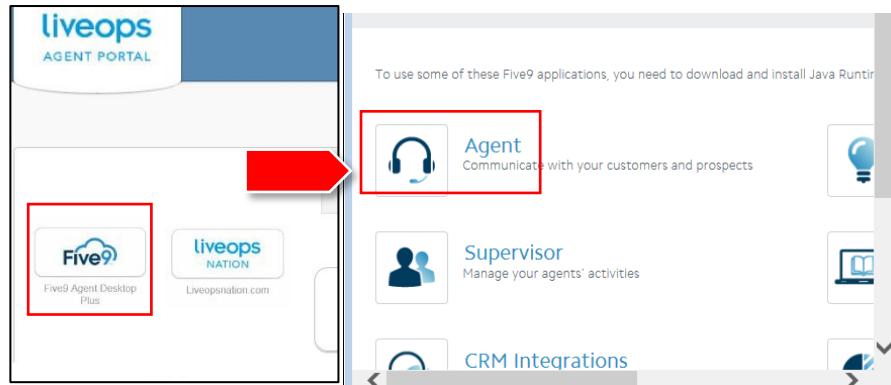
5. When you see the prompts as shown on the right, complete steps one and two.

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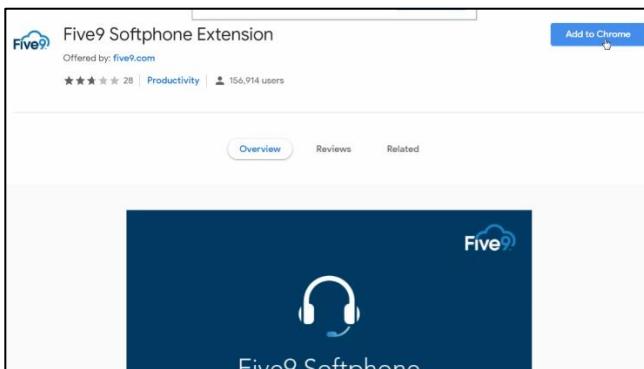


You may be taken to the **Google Chrome Web Store**.



**STATION CHECK**

Softphone station requires two additional components.

Step 1: Install Five9 Browser Extension    C 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.

**STATION CHECK**

✔ Connection Successful

If you did not hear 3 tones, change **Audio Devices** below and restart your station or go Back to Station Setup.

Audio Devices

🎧 Speakers (4- Logitech USB Headset)  ▼

🎤 Microphone (4- Logitech USB Headset)  ▼

⟳ Restart Station

Back                     View My Dashboard
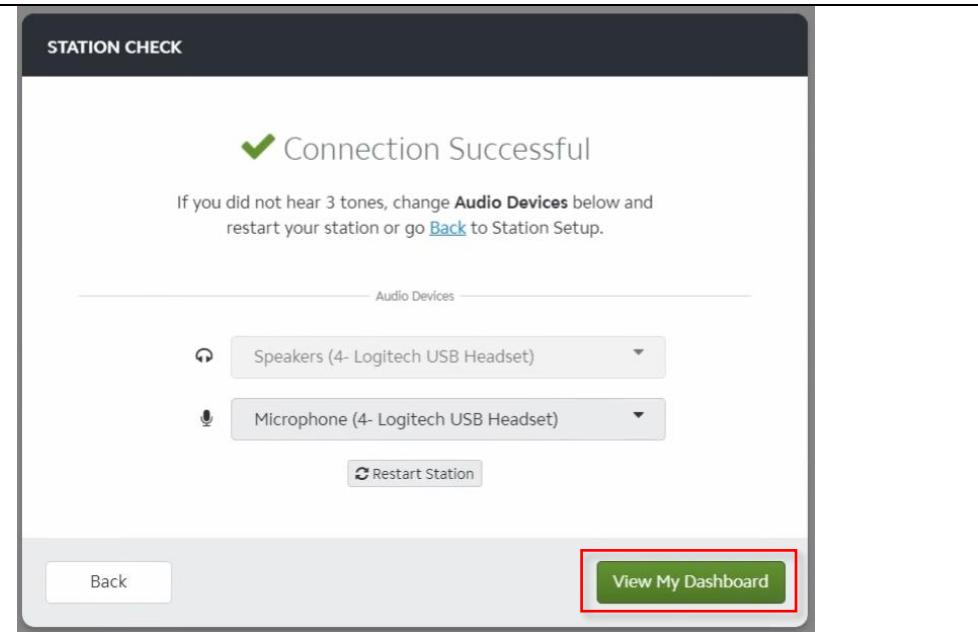
8. Once you have successfully set up and logged into Five9, you should see the following view.
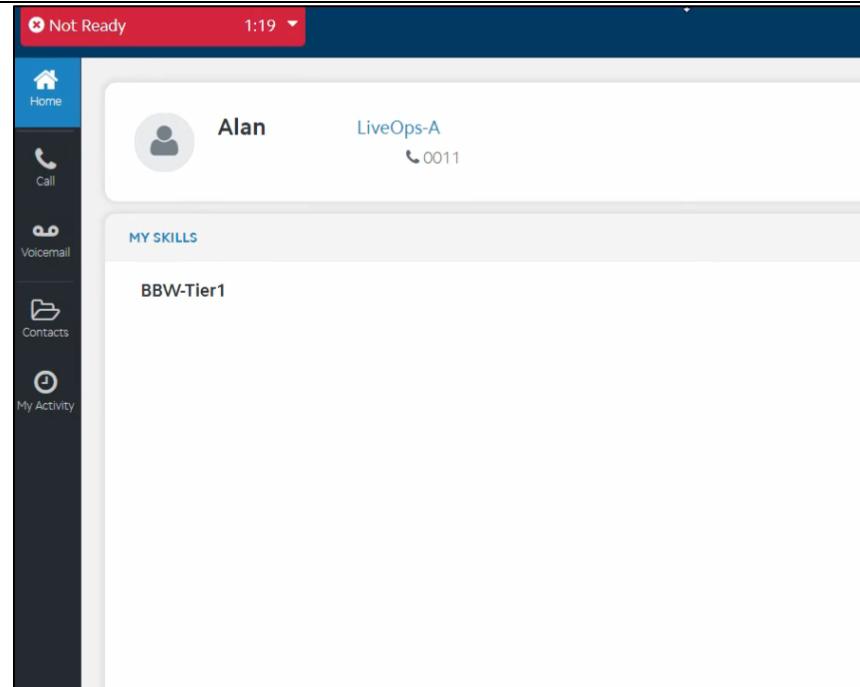
## Going to Ready State

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.

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

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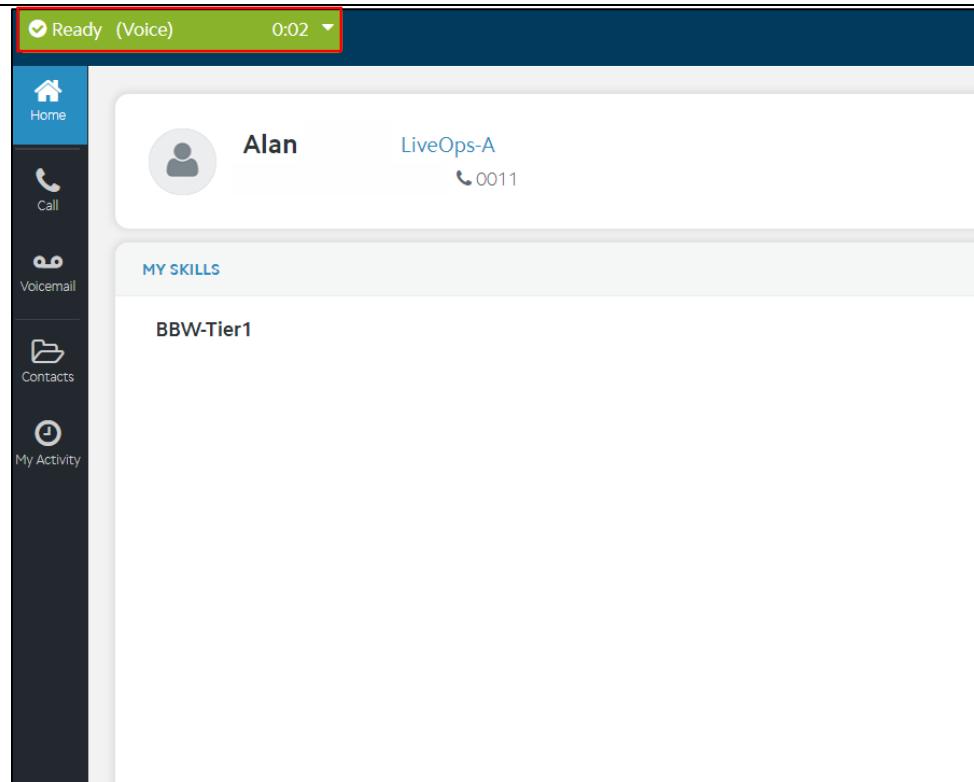
**Using the soft phone and script, stop recording for credit card collection and ending the call.**

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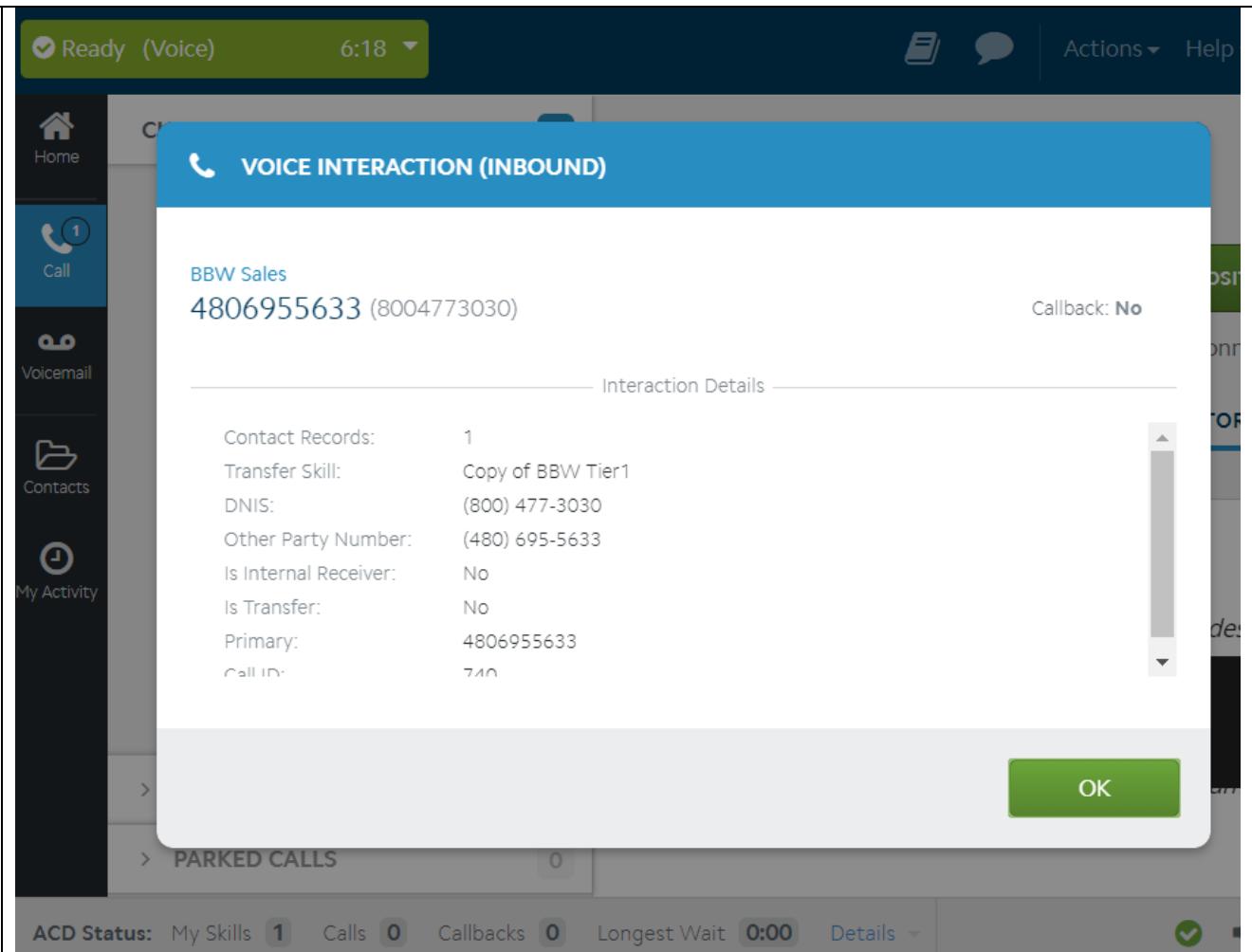
2.  Here you can see the soft phone on the left and script on the right.

**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.

**Bath & Body Works**

*Log into the Bath & Body Works VMWare on your desktop.*

❝ **Thank you for choosing Bath & Body Works ! My name is Alan Sarfati. 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!** ❞

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.

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

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**.

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.

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.
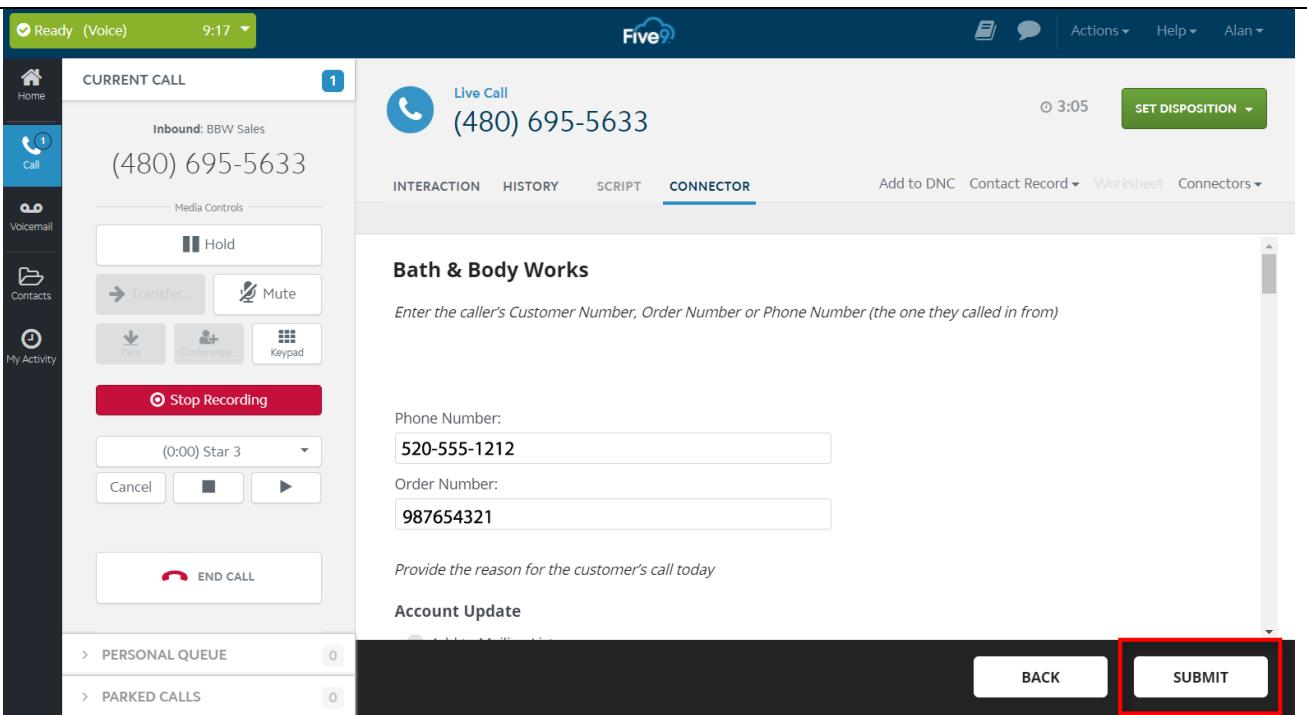
## Transferring/Conferencing

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

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.

3. 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).

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