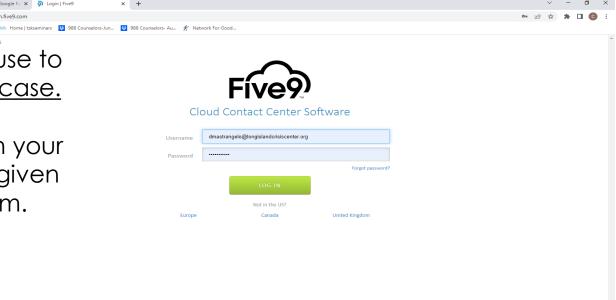
Five9 Telephone Training

How To Log In to Take Calls

Website: login.five9.com

Username: Your Email Address (the same email you use to log into InfoBase). <u>Please type your email in all lowercase</u>.

Password: Whatever you choose upon first log in with your temporary password. A temporary password will be given to you via email once you are entered into the system.

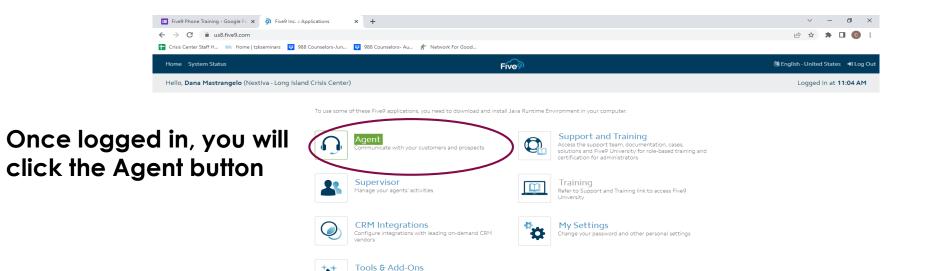


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Need help? Call our Customer Support Team at (866) 553-1459 or email us at cases@five9.con Copyright © 2023, Five9 Inc. J www.five9.com 3001 Bichoo Drive. Suite 350, San Ramon, CA 94583, USA

P Type here to search

How to Log In Continued



Install and configure add-ons for your applications

javascript:runWebAgent) Copyright 2001-2023 Five9, Inc. All rights reserved.

The full set of terms and conditions of service are contained in your current contract. If you require a new copy, please contact your account manager. Please note that as stipulated in your contract, all local and long distance rates reflected in VCC are post surcharge.

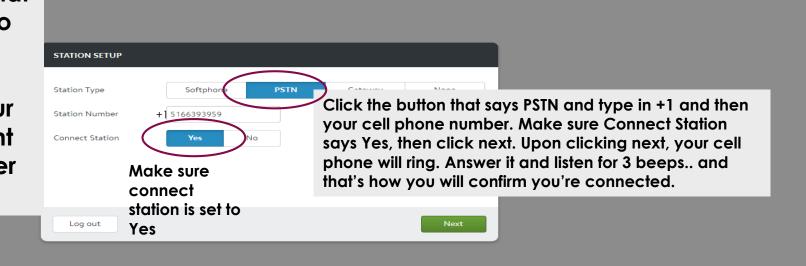
How To Log In Continued

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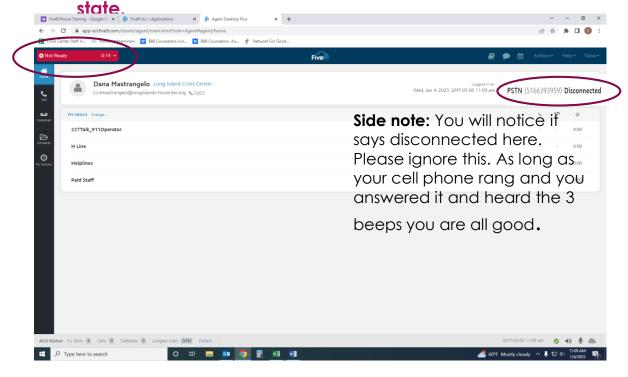
Next, you will need to put the phone number in that your calls will be sent to (cell phone, land line). You will only have to enter this info upon your first log in, or if you want to change what number calls are directed to.



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You're Logged In! Let's Get Ready to Take Calls

You'll notice there is a red box in the upper left corner of the screen that says Not Ready. You will not have calls delivered to you until you set yourself to a ready



Set yourself to ready by clicking the box, and then selecting Ready. There are 2 ready options, you can click either. You will also see other options, such as break, lunch, etc. Once ready, this box will turn green

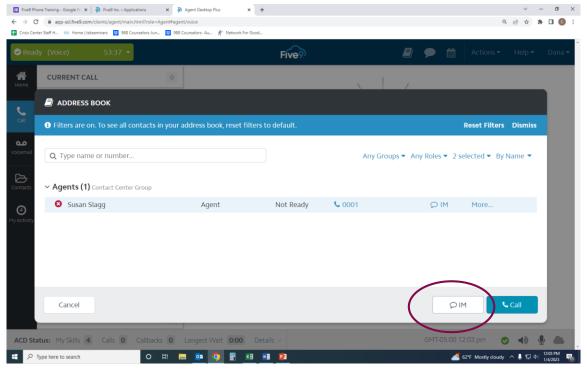
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You're Ready to Take Calls. Let's See Who is on Shift With Us!

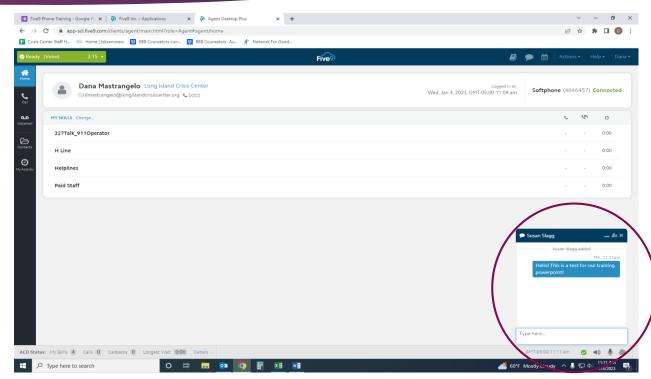
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In the upper middle section of the page you will see a little book icon- this is the address book where you will see all of the users. Click here. Once you click the book, all of the users will pop up. To filter and see who is currently logged in, you will need to click Any States on the top right and then select Available and Not Ready. You should only have to do this on your first shift. All agents logged in should now appear

Let's Chat With Each Other!

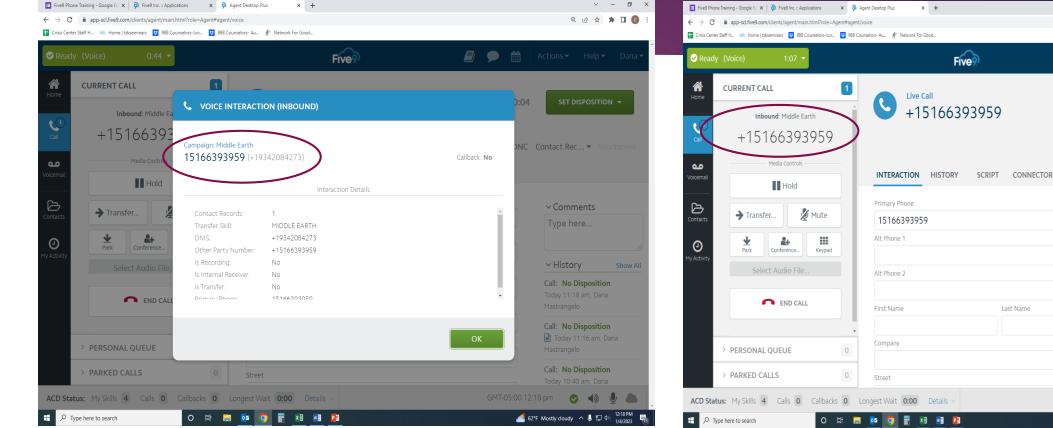






A chat box will appear in the lower right hand corner. Type your messages and hit enter. You will hear a chime sound when a message has been sent to you

Let's Take Hotline Calls!



When a call comes through, your cell phone will ring and the number 458-529-0264 will pop up on your caller ID. Save this in your contacts as HOTLINE CALL. In addition, the Line Called and the Caller ID will pop up on the computer. Answer your phone and look at your computer screen.

Once the call is answered, that initial pop up box may go away (if not, you can click the green OK button). The line the person is calling and the caller ID will remain on the screen the duration of the call

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SET DISPOSITION

Add to DNC Contact Rec...

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~ Comments

Type here...

~ History

Call: No Disposition

Today 11:18 am. Dana

Call: No Disposition

Call: No Disposition

Today 10:40 am, Dana

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Let's Take Hotline Calls Continued

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Attorney Contension File	Today No Disposition 11:18 am - Today No Disposition 11:16 am - Today No Disposition 11:16 am Known Caller Dana from LICC. Today No Disposition	Dana Mastrangelo Middle Earth Dana Mastrangelo Middle Earth Dana Mastrangelo

Cool feature alert! You will be able to see the history of the person calling by clicking the History button while on the call. This will help you ID known callers quicker and easier by being able to see the last time they called (assuming the don't come in as anonymous). You can then cross reference in InfoBase for more information.

Let's Take Hotline Calls Continued

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Wrap-up time (0:00) I The disposition was au	nas expired. Itomatically set to No Disposition	
		- 5
	Dismiss	

When you're finished with the call, in addition to hanging up your cell phone, you will have to click DISMISS on the large red box that pops up on the computer screen. That will make you available to take new calls. YOU WILL NOT BE OFFERED NEW CALLS UNLESS YOU CLICK DISMISS!!

Your Call Has Ended.. Now What?

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You're done with the call and ready to take another. Now it's time to write it up in InfoBase. But wait... What line was that on? What time was my call? Don't worry! You can click the My Activity button on the middle left of the screen and be able to see a log of all of your calls.

How to Do A 3-Way Call for our Translation Services

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Once on the call, a button that says Conference will appear. Click this button. This will automatically put the caller on hold. A box will pop up that will ask you to type a phone number. You will type the number of the translation service and click Initiate Conference. Your cell phone will ring- answer it- as this will start the call to the translation service.

How to Do a 3-Way Call Continued

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Once you have the translation service on the line, you will need to add them to the call with the client. Click the blue Add Participant button in the middle left of the screen.

How to Monitor Calls

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Upon logging in, instead of choosing the agent button, you will choose the Supervisor button. You will connect the same way as if you were taking calls, by clicking PSTN, making sure your phone number is correct, and then clicking next.

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How to Monitor Continued.

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How To Monitor Continued.

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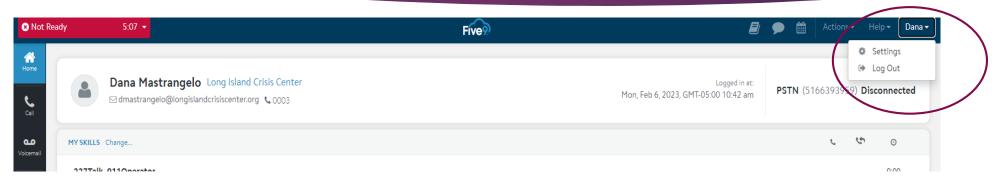
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Anne LICC aprilzhou96@gmail.com	Ready (Voice)	Today, 9:01:17 am	-	stening to no column. The			v	
Dana Mastrangelo dmastrangelo@longisla	Ready (Voice)	Today, 7:18:37 am	monitori	ng, and ther	n listen. Yo		\sim	_
Nancy LICC nancyjgolden@gmail.com	Ready (Voice, Vo	Today, 9:09:42 am	Ine Call	through you +16318492349	r phone.		(•	
Nicholas 988 costa20.nicholas@gmai	Ready (Voice, Vo	Today, 7:00:51 am	-	Lister	·	iew Agent Details	,	-
Omar Helpline ojokhan@gmail.com	Ready (Voice, Vo	Today, 9:08:43 am	-	Listen Barge Whisper		hange State (Voice, Voice end Message	email) 🕨	
Sharayah 988 sanonsharayah@gmail	Ready (Voice, Vo	Today, 7:01:27 am		-	V	iew/Edit Skills end Test Call		
Filters: Default Time Range	: Day • Campaign Period:	5 min • Skills: My Skills	• Agent Groups: All G	roups	G	Record All Calls This Se	ssion	ļ

How to Monitor Continued....

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Full Name & Username	Current State 🛛 🕇	State Since	Call Type	Customer	On Hold Duration	Reason Duration	Not F	Actions	
Emma Wiener ewiener@longislandcris	Not Ready	Today, 8:22:33 am	-	-	-	49:50		Ŧ	*
Anne LICC aprilzhou96@gmail.com	Ready (Voice)	Today, 9:01:17 am	-	-	-	-		Ŧ	
Dana Mastrangelo dmastrangelo@longisla	Ready (Voice)	Today, 7:18:37 am	-	-	-	-		Ŧ	
Nancy LICC nancyjgolden@gmail.com	Ready (Voice, Vo	Today, 9:09:42 am	Inbound	+16318492349	-	-		Ŧ	
Nicholas 988 costa20.nicholas@gmai	Ready (Voice, Vo	Today, 7:00:51 am	-	-	-	-		Ŧ	
Omar Helpline ojokhan@gmail.com		Nancy LICC	2:40		•	×	>	Ŧ	
Sharayah 988 sanonsharayah@gmail	Ready (On Call • Middle Earth	Listen	Barge Whisper Cha	t Prev Next	Cancel		Ŧ	
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Type here to search	Ħ	🧮 🛂 💼	s 📰 💶 📘	2 🚳 🚾	3	🛑 6°F 🧄 🖗	ወ <i>(ଲ</i> (1୬)	9:12 AM 2/4/2023	

Once you click listen, a box will pop up on the bottom of the screen. It will show the name of the person you are listening to, the hotline the call is on, and how long they've been on the phone. You can also chat with the counselor by clicking the chat button. You must follow these monitoring steps every call the counselor gets. For the most part, you will be with your mentor/trainee on Zoom so you can announce out loud that you have a call coming in which will make it easier for the listener. For those of you doing a listening shift from the office, you will follow the instructions on the counselor desks.

Logging Out



At the end of your shift, whether you're logged in as an agent or a supervisor, you will need to log out. Simply click your name in the upper right hand corner, then click log out.

Miscellaneous Important Tips!

- You must disable all screen savers and insure your computer does not go to sleep during periods of inactivity. If a screen saver comes on, or your computer goes to sleep, you will be disconnected from the Five9 website. You can do this from your computers settings.
- The Five9 website takes up a lot of space on your browser, so we recommend only having the Five9 site and InfoBase open on your computer during your shift. Call quality can be affected otherwise.
- Please periodically clear the cookies and browsing history on your browser to make sure there is space for the Five9 site to run properly. If you are unsure of how to do this, you can google "clear cookies on ____ (firefox, safari, chrome, etc.)" and you should get detailed instructions.
- If you find you're having issues with the Five? site that you can't figure out yourself or that a restart of the website, your computer, and a clearing of your cookies does not fix, please contact Dana (<u>dmastrangelo@longislandcrisiscenter.org</u>) with a detailed description of the problem and a screen shot of the error message if possible. Dana will troubleshoot with you or contact support if necessary.