# Compass - Log In (Login) and Out of Five9

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**Description:** Provides CCRs with steps to log in and out of Five9 in Compass.

**Vendors:** Refer to [Compass - Five9 WebRTC Log in Steps - Vendor (073866)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=708229c2-45c0-4e43-a402-c50c9b4d975f)

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| Log In to Five9 |

Complete the steps below:

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| **Step** | **Action** | | | |
| **1** | Copy/paste the appropriate URL in a **Chrome** browser, and then press **Enter:**   * **Training:** <https://service360--training1.sandbox.my.salesforce.com/> * **Production:** <https://service360.my.salesforce.com/> | | | |
| **2** | Click **Login with Ping Federation**.    If **Log In with Ping Federation** option does not display, select **Log In with a Different Account,** then select the Ping Federation option to Log In.  **Result:** Compass displays. | | | |
| **3** | Click **Engage** at the bottom left to launch the Five9\_ADT login.    **Result:** Five9 Adapter for Salesforce popup displays. | | | |
| **4** | Enter Five9 login credentials and click **SSO Log** In.    **Result:** Station Setup pop-up displays. | | | |
| **5** | Click **Confirm**.  Do **not** change the Station Number.    **Result:** Station Check pop-up displays. | | | |
| **6** | Listen for three (3) tones. | | | |
| **If three (3) tones are…** | **Then…** | | |
| Heard | Click **Confirm** and continue to the next step. | | |
| Not heard | Click **restart your station** and repeat step.    **Note:** If still unsuccessful after restarting station, check with your supervisor for next steps. | | |
| **7** | Pop out your softphone so that it is always visible on your screens.   * Select the **pop-out** button in the top right of the softphone. Always do this in a non-Ready state and not during live calls as there is a slight delay when re-establishing the connection which may interfere with a call.     **Notes:**   * Move the softphone to the non-Compass monitor and ensure that it is always visible and not located behind another browser. Below is an example of a screen setup on the non-Compass monitor. * If you need to re-integrate your softphone with Compass again, you can select the same button, labelled “pop-in.” | | | |
| **8** | Select an appropriate Ready agent state depending on your role and what channels you are assigned to:   * [Voice phone calls only](#ReceivesVoiceCallsOnly) * [All other calls](#ReceivesAllOtherCalls)   **Notes:**   * Users should always be mindful of their Agent State when signing into Five9 and change it as needed. If a Five9 user logs out or if there is a service disruption that causes them to be logged out, and then they log back in within five minutes, they'll be returned to the previous Ready or Not Ready state they were in before logging out. * If unsure what Ready option to select, reach out to supervisor. * This process can be followed anytime an agent needs to change their state. | | | |
| **If agent receives…** | | **Then…** | |
| Voice phone calls only | | Select **Ready**.    **Result:** This option will only make you ready for inbound Voice calls. | |
| All other calls  (Voice, Voicemail (QVM), Chat, Secure Messaging)  **Note:** Voicemail (QVM) does not refer to individual/personal voicemail but rather clients that allow members to leave a voicemail during hold times. A small group of clients use this and most agents do not take these call types. If you are unsure if you take these client lines, reach out to your supervisor. | | Follow the steps below: | |
| **Step** | **Action** |
| **1** | Select **Ready for…** |
| **2** | Choose the correct option based on your role.  **Note:** You can only select one option.   * **Ready for Secure Message and Chat Only:** All Secure Message and Chat agents should select this option. * **Ready for Voice Only:** Voice agents should select this if they do not handle Queued Voicemail (QVM) calls or are skilled for QVM clients but are instructed by their supervisor not to take QVM calls. * **Ready for Voice and Voicemail Only:** Voice agents who also handle Queued Voicemail (QVM) calls and need to go Ready for both should select this. * **Ready for Voicemail Only:** Voice agents who handle Queued Voicemail (QVM) calls and are only taking QVM calls should select this. Agents should always check with their supervisor before going ready for only QVM, as they will not receive Voice calls.     **Result:** Once your selection is made, the Confirm button turns green. |
| **3** | Select **Confirm**. |

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| Troubleshooting Login Issues |

Use this section to troubleshoot login issues:

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| **Problem** | **Resolution Steps** | |
| **Do not hear three beeps when logging on** | **Note:** After each step, click **restart your station** and listen again for the 3 beeps. If agent still does not hear the 3 beeps, continue to the next step.    Follow the steps below: | |
| **Step** | **Action** |
| **1** | Check that headset is connected to system and not muted.   * If system does not recognize headset, ensure headset is connected securely to a working USB port. Change USB ports, if needed. |
| **2** | Confirm that the **Headset** being used is selected under Output and Input on the dropdown of Five9. |
| **3** | Check system volume.   * To ensure the headset and/or application specifically has volume turned up, right click the volume icon in the Windows taskbar and choose “Open Volume Mixer.” |
| **4** | Click **restart your station** if no sound is heard.  **Notes:**   * If still unsuccessful after restarting and following the steps again, check with supervisor for next steps. * Not all headsets are compatible with Five9. Consult with supervisor to confirm compatibility. |
| **Other Issues** | Refer to [Five9 CCaaS Troubleshooting Guide (052267)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=49b28887-b0f7-4992-9a55-040a4a86d9ee). | |

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| Log Out |

If you close the browser window displaying Five9, you may not be immediately logged out. Follow these steps to log out:

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| **Step** | **Action** |
| **1** | In Five9, click the **power** icon to the left of the **Agent State** dropdown.    **Result:** Agent is logged out of the Five9 application. |
| **2** | Log out of Compass. Refer to the Log out Process section in [How to Access the Compass Production Environment (Log In, Log Out, Check for Open Cases) (050012)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a89e3bd-1ddc-4466-bd1b-93f0cbe17013).  **Note:** If agents do not log out of Compass when logging out of Five9, then when they log back into Five9 they will be returned to the previous Ready or Not Ready state that they were in prior to logging out. |

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| Related Documents |

[Five9 Document Index for Agents (052307)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=e696b7c2-078e-444c-a317-bf857986aa23)

[Customer Care Abbreviations, Definitions, and Terms Index (017428)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c1f1028b-e42c-4b4f-a4cf-cc0b42c91606)

[Compass - Five9 WebRTC Log in Steps – Vendor (073866)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=708229c2-45c0-4e43-a402-c50c9b4d975f)

**Parent Document:** [CALL-0049 Customer Care Internal and External Call Handling](https://policy.corp.cvscaremark.com/cs/groups/public/@pnp/@all/@6700/documents/sop/y2fs/bc0w/~edisp/call-0049.pdf)

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