# Compass - Five9 WebRTC Log in Steps - Vendor

[Five9 Phone WebRTC for Compass Users](#_Toc206504349)

[Log Out of Five9](#_Toc206504350)

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**Description:** Describes the process for vendor agents to log in through WebRTC through the Five9 phone application.

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| **Five9 Phone WebRTC for Compass Users** |

  Compass agents must first access Citrix before continuing. Refer to [Compass and PeopleSafe - Citrix Log in Steps – Vendor (076698)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d9cf75ca-3cef-4ec8-8ed0-fc1272c56b21) as needed to access Citrix.

Follow the steps below:

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| **Step** | **Action** |
| **1** | Once successfully logged into Citrix you can now access the Compass and Five9 application.  Click on the **Service 360 – Sycurio Azure** app. (This is the Compass application.)  **Notes:**   * For some users, opening the **Service 360 – Sycurio Azure** app will automatically open Compass to begin the log in process. * For other users selecting the app for the first time, right click on the open file link and select **Always open files of this type**.   + Open the download file that appears on the screen. This should only happen the first time logging in through the app.     **Result:** Loading Screen displays. |
| **2** | Click **OK** when the **Notice** screen displays.    **Result:** CVSHealth Credentials screen displays. |
| **3** | Click **Log in with Ping Federation**.  Refer to [How to Access the Compass Production Environment (050012)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5a89e3bd-1ddc-4466-bd1b-93f0cbe17013) as needed.    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. |
| **4** | Once Compass is launched, click on the **Engage** button to begin the Five9 WebRTC login in process.    **Result:** Five9 Log in screen displays. |
| **5** | Select **SSO Log In**.    **Note:** Because your Five9 credentials are SSO based, **Do Not** select “Forgot Your Password” as this will not reset your SSO credentials.  **Result:** The Station Setup screen displays. |
| **6** | From the Station Setup screen, change the default Station Type from Softphone to **WebRTC** and then click **Confirm**.   If the station number is blank, navigate back to the station type Softphone and copy the station number, then go back to the WebRTC selection and paste the station number in the Station Number field and select **Confirm**.    **Note:** Onceyou have selected WebRTC, Five9 will remember the selection of WebRTC and will default to this in future log ins.  **Result:** Station Check screen displays. |
| **7** | The 3 tones will be heard in user’s headset to confirm audio is working as expected. If the tones are heard, select **Confirm**.    **Notes:**   * If you did not hear the 3 tones, select the **restart your station** hyperlink. * If you receive the below error message, this error message can be closed if the 3 tones are heard. * If the error message is displayed and 3 tones are heard, continue by selecting Confirm.     **Result:** User is now logged into Five9. |
| **8** | Pop out your Five9 so that it is always visible on your screens.   * Select the **pop-out** button in the top right of Five9.   **Note:** 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. |
| **9** | Stay in the “Not Ready” default status in Five9 while logging into your other applications. |
| **10** | Refer to [Cresta Functionality and Processes (067901)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f28dbdf4-4355-45be-95c4-6bda1c08a521) as needed for login steps. |
| **11** | Log into the Source within Citrix.    **Result:** You are ready to begin taking calls. |
| **12** | Log into Cresta outside of Citrix. Refer to [Cresta Functionality and Processes (067901)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=f28dbdf4-4355-45be-95c4-6bda1c08a521).  **Note:** Cresta log in should happen before making yourself “Ready” in Five9. |
| **13** | Log into theSource within Citrix.    **Result:** You are ready to begin taking calls. |
| **14** | Change Five9 to the “Ready” status. Refer to the Changing States section of [Compass - Five9 Phone Agent Desktop (056045)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad8f7284-fee0-4ae1-bbbd-d2cbe07a331f). |

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| Log Out of Five9 |

 **Reminder:** Do not just close the browser. Make sure to complete the log out process below. If the browser is closed without first logging out, the user will not actually be logged out for several minutes and during that time may receive calls. If you accidentally close the browser, re-launch and log out properly.

Complete the steps below:

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| **Step** | **Action** |
| **1** | Click the Logout icon Icon  Description automatically generated left of the Agent State.   * Once you logout, the login page will display. * **Note for PeopleSafe Users:** Close out of this completely a user will not be able to log back in using this page.     **PeopleSafe View:**  A screenshot of a computer  AI-generated content may be incorrect.  **Compass View:** |

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| Related Documents |

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

[Compass - Five9 Phone Agent Desktop (056045)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=ad8f7284-fee0-4ae1-bbbd-d2cbe07a331f)

**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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