Receiving an Outbound Campaign Call

1. Make sure you are in **Ready** state to receive incoming calls.
2. Always enable **Auto-Answer** for **Outbound Campaigns** as the dialer automatically delivers the calls to you.
3. Start your greeting once the **Incoming Call** window appears.
4. The **Script** Tab opens automatically if the campaign has a script associated with it.
Receiving an Inbound Campaign Call

1. Make sure you are in the Ready state to receive incoming calls.

2. Click the Accept or Reject button to accept or skip a call.

If Auto-Answer is enabled, the call is immediately connected to you.

The Incoming Call window displays general information about the call.

The Script Tab opens automatically if the campaign has a script associated with it.
Placing Calls on Hold

1. Click the Hold button to place a call on hold.

The timer on the hold button will indicate how long the contact has been placed on hold.

Retrieve the call from hold by clicking on the same button.
Managing Parked Calls

1. Be sure to select a Not Ready state before parking the call, otherwise, you may receive another campaign call while your original one is parked.

2. Click the Park button to park a call.

3. Click the down arrow to show more options.

4. Click the Transfer Call button to transfer a parked call.

5. Click the Add to conference button to add a parked call to a conference.

Click the Retrieve Call button to retrieve a parked call.

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Setting up a Conference Call

1. Click the **Conference** button to start a Conference Call
2. Click the **Leave Conference** button then select a disposition to leave a conference
3. Select who you want to add to the call or enter the 3rd party number you want to join
4. Enable the **Warm** checkbox then click **Add Participant** to perform a warm transfer
5. Select the **Complete Conference** button to add the 3rd party to the original call
Transferring Calls

Click the **Transfer** button to transfer a call

2. Select who you want to transfer the call to or enter a 3rd party number

3. Enable the **Warm** checkbox to speak with the 3rd party before transferring the call

4. Enable the **Record Voicemail** checkbox to transfers the call to the receiving agent's voicemail if it cannot be answered

5. Select a disposition then click **Transfer**
A Call Script can be a simple call flow, sales pitch or legally mandated script assigned to your campaign. If a script exists for your Campaign, the Script tab becomes active and is the first visible screen after receiving a call.
Filling In Worksheets

1. Click on **Worksheet** upon receiving a call.
2. Use the left and right arrows to navigate through the questions.
3. Answers vary depending on how your administrator created the worksheet.
4. Click **Finish** to save the worksheet.
Click the **Record Call** button to record an active call.

Click the **Stop Recording** button to end the recording.

The option to manually record calls is a permission and therefore may not be available on your station.
Click the **Transfer** button to transfer a call.

You will receive a **Caller Disconnected** message if the caller hangs up first.
Click the **Set Dispositions** button and select the **Disposition** which describes the result of the call. The **Dispositions** available for a call may be different for each campaign.
Adding Numbers to the DNC List

Go to Actions and click Add to DNC

Type the number on the Add to DNC dialog box

You can also add numbers to the DNC list by choosing the Add Number to DNC list disposition at the end of the call, if this is configured for your campaign.
Scheduling a Callback Reminder

1. Click the **Calendar** icon and select the **New Reminder** button
2. Fill up the details for the reminder, including the **Description**, **Date and Time**, **Timezone**, **Phone Number**, **Contact Details**, and **Campaign**
3. Click the **Save** button to create the callback reminder