Five9 Softphone and Manitou Integration

July 2024

Manitou®

Contents

Overview

Integrated Manitou with the Five9 Softphone dialer integration will include having the Five9 dialer visible in the Manitou Web Client. The Manitou dialer and the Five9 dialer will work with each other to call out, accept incoming calls, disconnect calls, and set call dispositions. This integration is only available with the Manitou Web Client and is not available with the Operator Workstation.

Setup

Manitou version 2.1.42 (or higher) is required for this integration.

The Five9 Softphone software needs to be installed on every workstation. This installer should be provided by Five9.

Web.config Configuration

There are three new Key values that must be configured in the Manitou Web.Config.

This key provides the URL for the login information including the SSO login information. Five9 provides the value for this key.

```
<add key="Five9UiUrl"
value="https://app.five9.com/clients/integrations/adt.main.html?idpLoginUrl=h
ttps%3A%2F%2Fdev-
00968258.okta.com%2Fhome%2Ffive9plusadapterforagentdesktoptoolkit%2F0oaba6abb
kK6JxoLf5d7%2Faln1augnpk1i3oJrI1d8" />
```

This key is the link for the Java script for the Five9 interface to work in the web client

```
<add key="Five9Js" value="https://cdn.prod.us.five9.net/stable/crm-sdk-
lib/five9.crm.sdk.js" />
```

This key is for all the settings. The campaigns are created by Five9 and are used to map numbers to a dealer or to the defaulted line. "TEST" in the settings below is the default if it cannot find a campaign name that matches to a dealer. "BOLD" is a prefix that can be used to differentiate dealer campaigns from other campaigns that may be used by the central station. For example, if there is a dealer with a dealerID of "DLR1" the campaign in Five9 would need to be BOLDDLR1. The disposition mapping is mapping Manitou dispositions to the dispositions defined in Five9. Five9 creates the dispositions. The hot key is the

combination of keys that can be used to hide and unhide the Five9 dialer from view. Hiding and unhiding does not affect its use. The dialer will continue to work even when hidden.

```
<add key="Five9Settings"
value="TEST|BOLD|0,Unknown,1,Contacted,2,_Busy,3,NotIn,4,Error,5,LeftMessage,
6,NoAnswer,7,Abort,8,WillNotRespond|ctrl+f9" />
<!-- Records are separated by a pipe, fields in the record separated by
comma. -->
<!-- defaultCampaign|campaignPrefix|dispositionMapping|UIhotkey -->
<! --
TEST|BOLD|0,Unknown,1,Contacted,2,_Busy,3,NotIn,4,Error,5,LeftMessage,6,NoAns
wer,7,Abort,8,WillNotRespond|ctrl+f9 -->
<!-- Unknown,          0
Contacted,      1
Busy,           2
NotIn,          3
Error,          4
LeftMessage,    5
NoAnswer,       6
Abort,          7
WillNotRespond, 8 -->
```

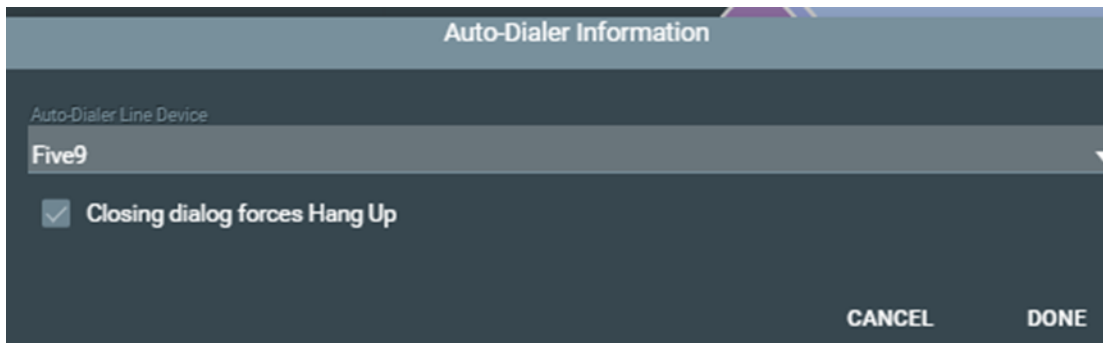## Manitou Web Client Configuration

In the Manitou Web Client select the Dialer from the navigation menu:
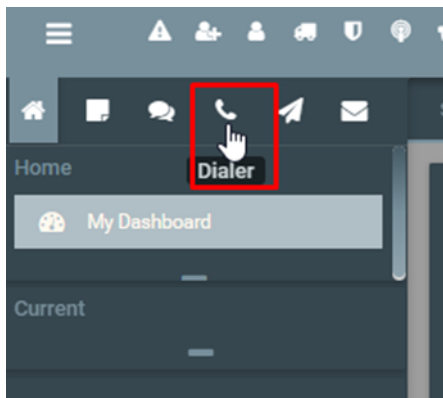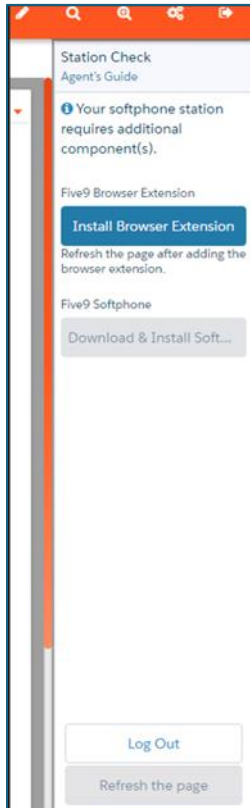
Select the Config for the dialer:
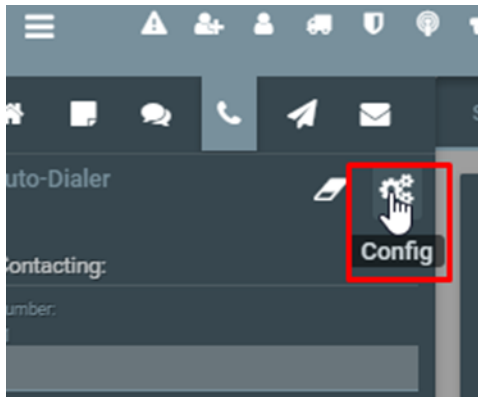
In the drop down select Five9 for the auto-dialer Line Device type:

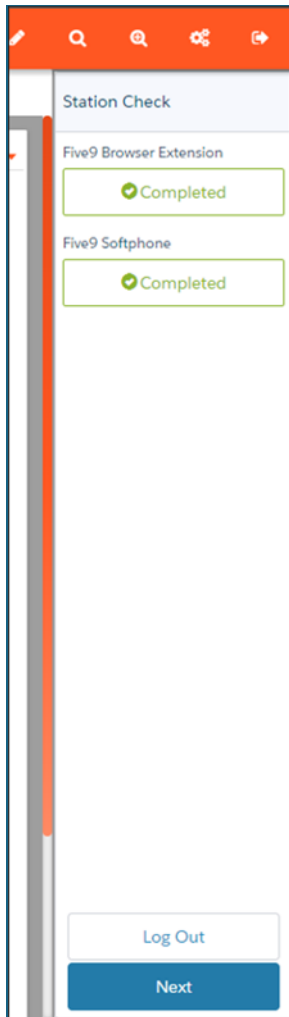Once selected, click **Done**.

Five9 Dialer Configuration

On the right-side where the Five9 dialer is visible, it asks you to install a browser extension.
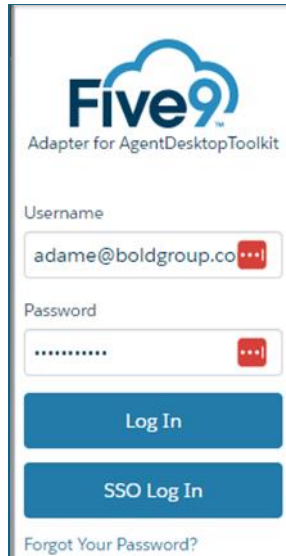

Click the **Install Browser Extension** button and follow the instructions for installing.

Once the Five9 Softphone Service has been installed and the browser extension is installed click **Next**.
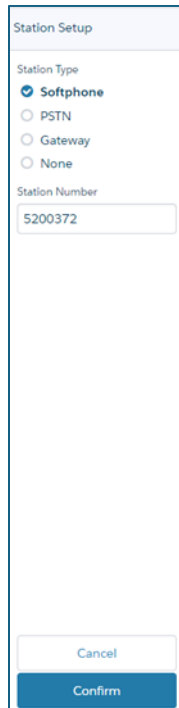

After clicking **Next**, to get to a login screen the options to continue may be grayed out and not available to click. It may require a reload of the page or closing out and re-launching the Manitou Web Client.

Once on the login page enter your **Username** and **Password** or click the **SSO Log In** option if it is available.

After logging in the Station Setup is visible. This is provided by Five9.

Click **Confirm** to confirm the station information is accurate.

Next, set the input/output audio connections. If Five9 cannot find both an input and output source, you cannot continue past this point. Once an input/output source has been selected, you will hear a series of three tones and the **Confirm** button is enabled.
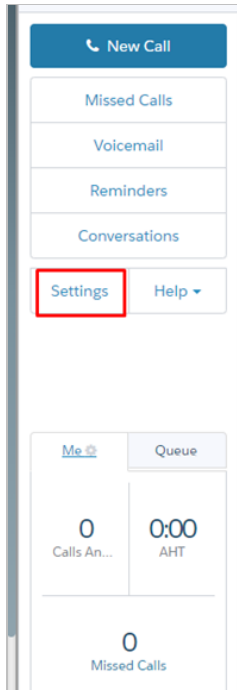
Once logged in, the Status on the Five9 dialer is set to "Not ready"; change this status to "Ready" to receive inbound calls. Outbound calls can be made when the setting is set to "Not Ready".
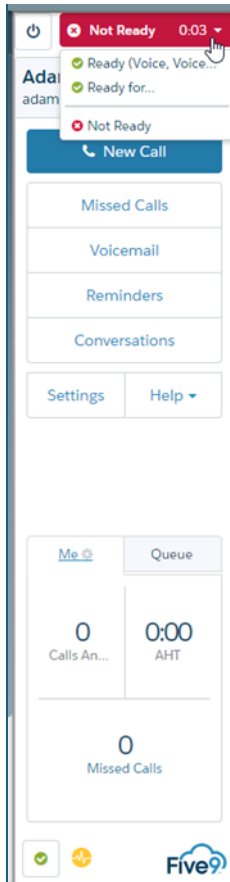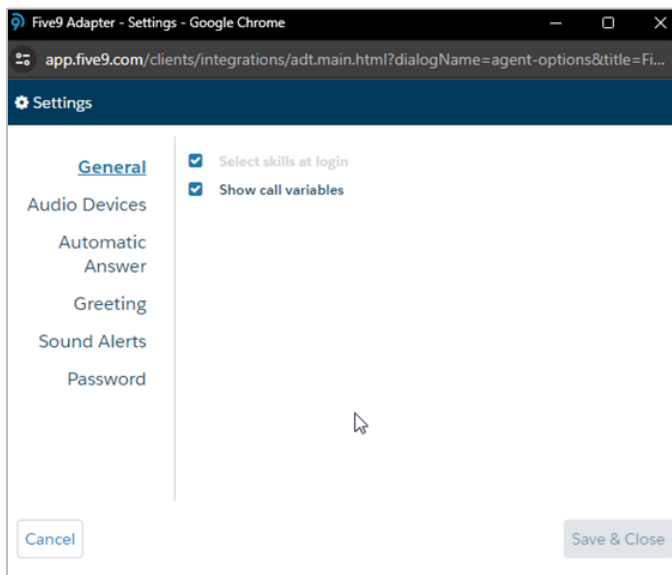
In addition to the browser extension, there are Chrome settings to allow access to the Five9 dialer settings and cookie settings.

chrome://flags/#third-party-storage-partitioning — disable this to get settings to show.

chrome://settings/cookies?search=third - enable third-party cookies.

Using the Five9 Softphone with the Manitou Web Client

The Five9 dialer UI will work in conjunction with the Manitou dialer.

- Hanging up the dialer in the Manitou dialer will also hang up the call in the Five9 dialer.
- Setting the disposition in the Manitou dialer will set the disposition in the Five9 dialer.
- Clicking the End Call button on the Five9 dialer will hang up the call in the Manitou dialer.
- However, ONLY setting the disposition in the Five9 will not set the disposition in the Manitou dialer. You must still select Continue in the Manitou dialer to complete the action.
- You will not be able to make another call until the disposition from the previous call has been set.

Once completing the Password verification and clicking **Done** or **Cancel** the call disconnects.
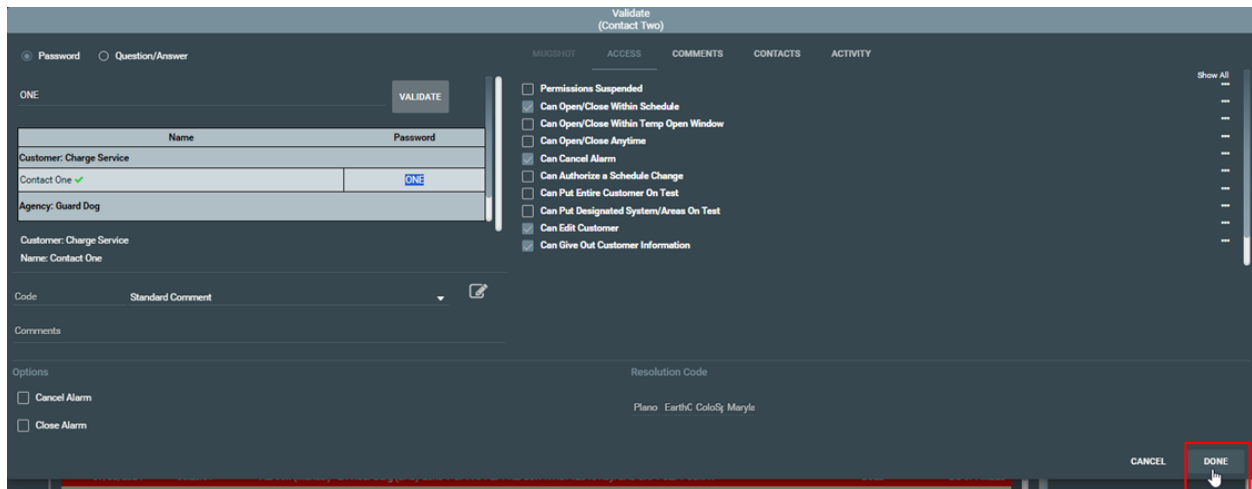
It is important to complete any necessary communication on the call BEFORE clicking Done or Cancel

If you entered the Password Validate box, most of the information you need is available in the dialog box.

Dialing from a Customer/Dealer Record

Open the record showing the person that needs to be contacted. Find the contact point on the Details form or in the Contacts form. Click on the phone icon next to the number.
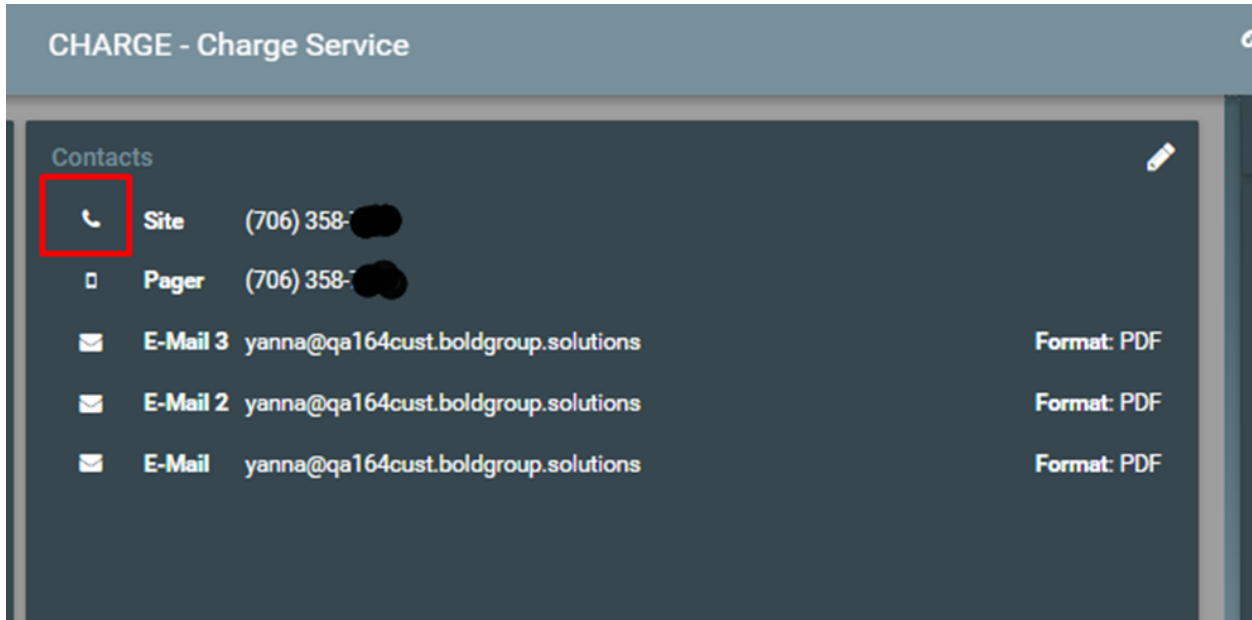
As soon as the phone icon is clicked the Five9/Manitou dialer initiates the call.
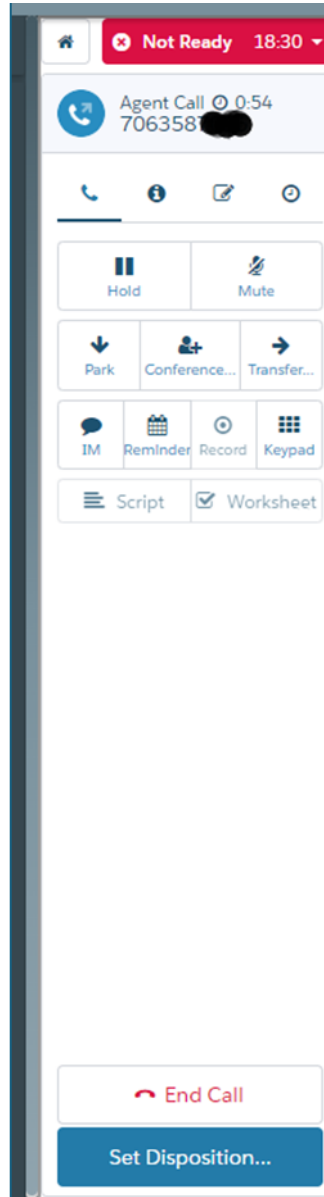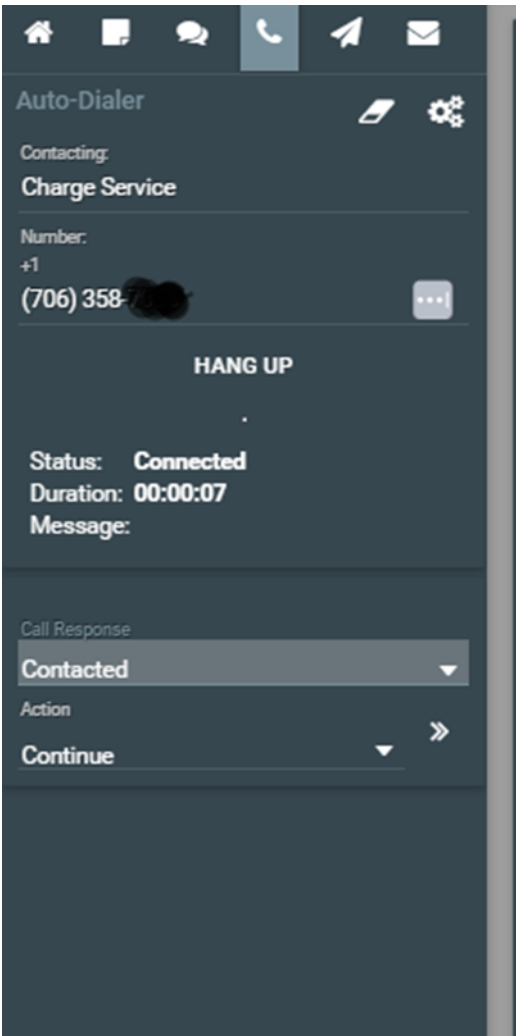
Disconnecting the call can occur:

- When the person being called disconnects
- The **Hang Up** button is clicked in the Manitou dialer
- The **End Call** button is clicked in the Five9 dialer

Once the call has ended, select a disposition before making another call. You can select a disposition in the Manitou dialer and click to Continue.
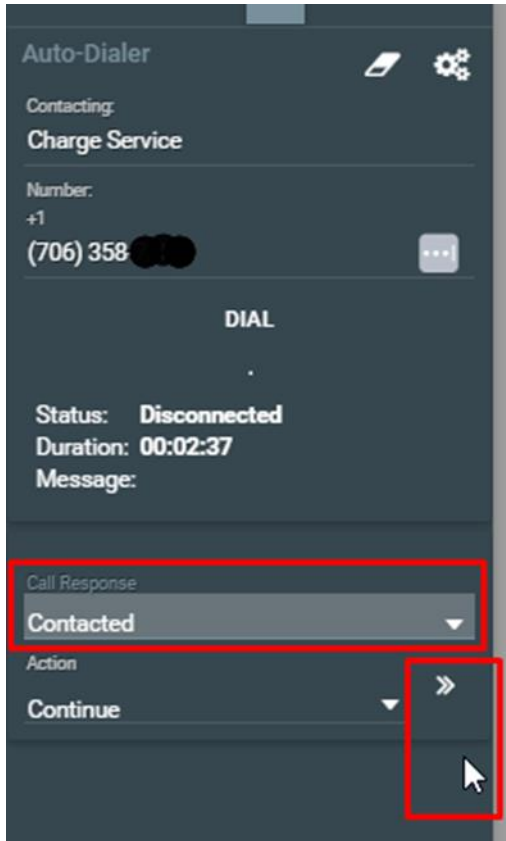
There is a prompt to enter Call Notes. After clicking **OK**, the call is considered complete and you can make another call. The Five9 dialer resets to its home view and Manitou changes focus to the home tab.
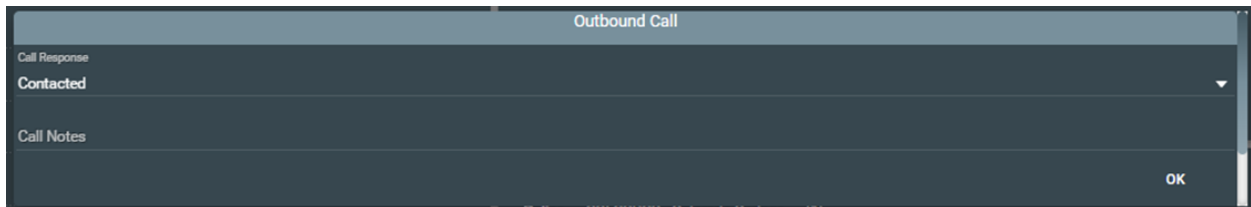
Doing those same steps but selecting to disposition the call from the Five9 dialer by clicking **Set Disposition** brings up the disposition options.
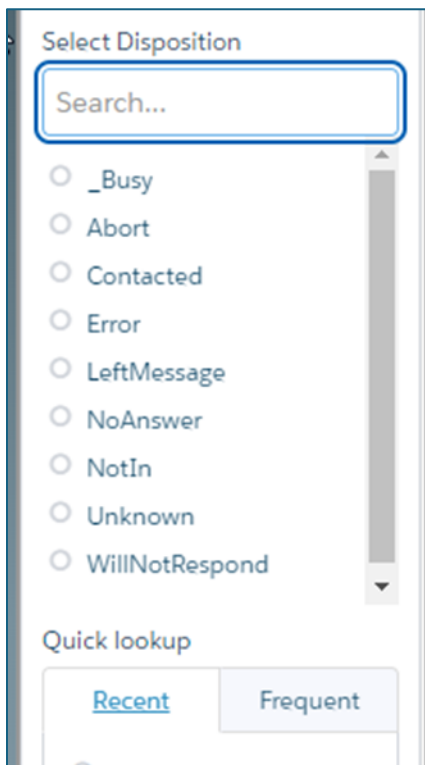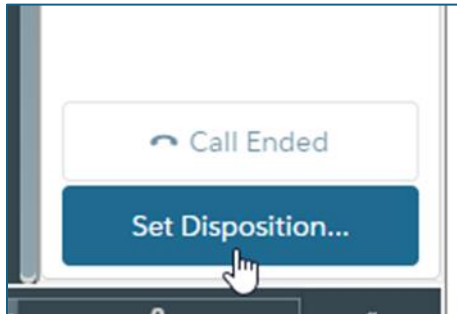
Choose the appropriate disposition.

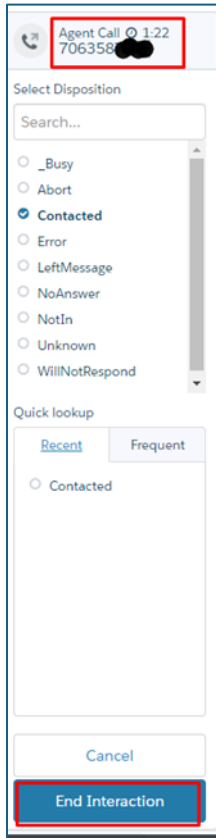Note that the even though the call has been disconnected, the clock on the Five9 dialer continues to log until the disposition is set and the call interaction is completed in either the Manitou dialer or the Five9 dialer.

After selecting the disposition and clicking **End Interaction**, the Five9 dialer considers the call complete and returns to its home screen. However, in Manitou the disposition still needs to be set to complete the call.
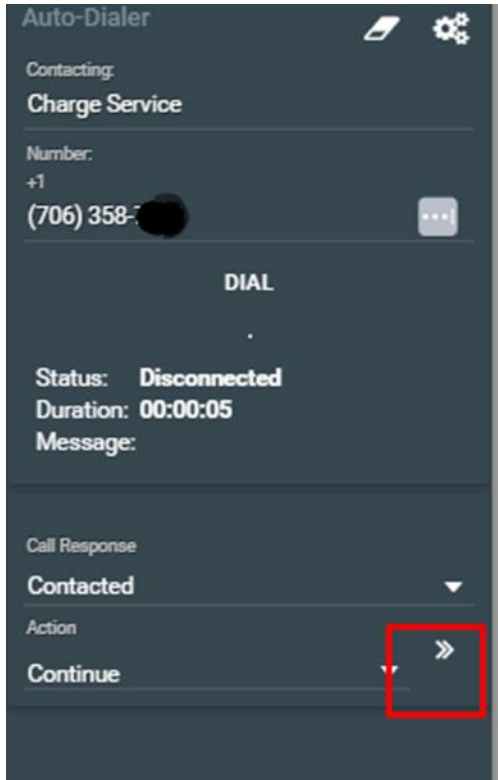
If you wish to dial the number again before completing the disposition in Manitou, you can since the call was completed in the Five9 dialer. If you click Dial again, the number is dialed again. At the end of a second call, the call still needs to be dispositioned before making another call. If you choose to disposition in the Manitou dialer the option for the Outbound Call Notes comes up.

After clicking **OK**, both the Manitou dialer and the Five9 dialer consider the call to be completed.

If for some reason the call is disconnected and the call has not been dispositioned in either Manitou or Five9, you can click **Dial** again in the Manitou dialer. Before dialing though it forces you to choose a disposition for the last call.
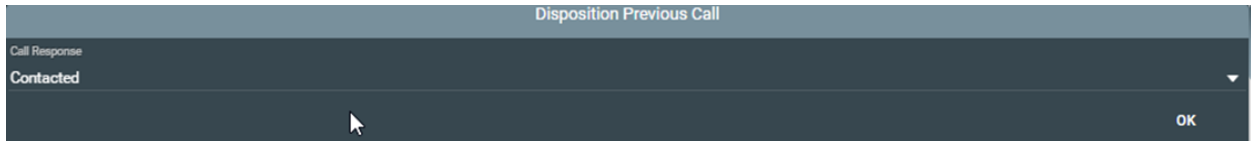
After clicking **OK** the new call automatically starts.

Receiving Inbound Calls

The Five9 dialer must be set to **Ready (Voice, Voicemail)** or **Ready for…** and it gives you the channels to select to be active in.
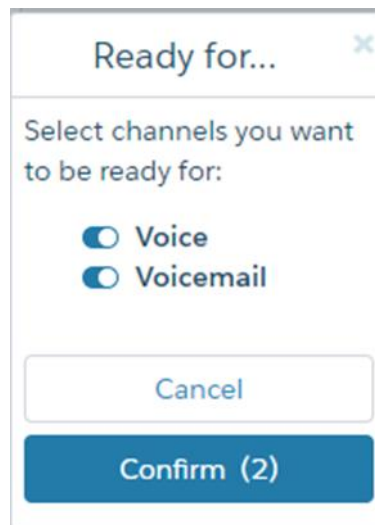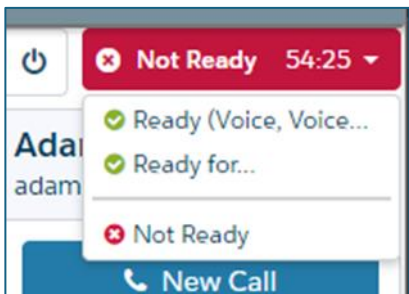
The Five9 dialer does not need to be visible to accept incoming calls.

During an incoming call, a message box pops up asking if you want to accept the incoming call.
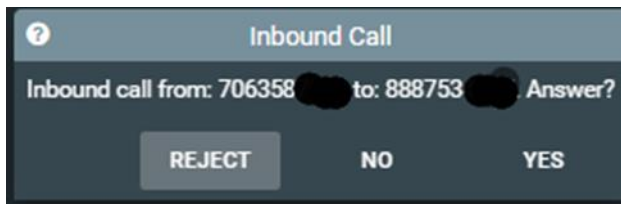
If you choose YES to answer the call, the Five9 dialer automatically unhides itself and becomes visible.

Once choosing to accept the call, the call must be completed all the way through to disposition before receiving or making another call. The disposition must be set in the Five9 dialer.

Manitou will have no record of any incoming calls, so it is your responsibility to mark an alarm or an account with any incoming call information.

If you choose to REJECT the call, the call goes in the queue for the next available operator. The option to REJECT a call is dependent on permission settings within Five9.

If you choose NO, the call continues to ring until it times out. There is a quick message on the dialer stating your status has been set to Not Ready, and you need to reset your status to begin taking calls again.
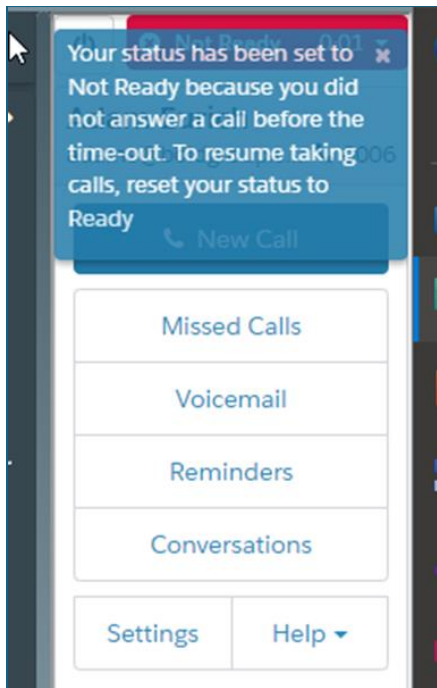
You need to manually update your Five9 dialer back to a Ready status to accept incoming calls.

Making Calls from Alarms

The dialers work similarly to making calls from an entity. Clicking "Do" in an action pattern will initiate the call and show in the Manitou dialer. It will show as dialing in the Five9 dialer as well, but if the Five9 dialer is hidden you can choose to just work with the Manitou dialer.

Once in the alarm and the action pattern is set for the contact action, clicking "D" for "Do" initiates the call. If the contact has multiple contact points and the action pattern did not specify which to call, it brings up all available contact points to choose from.
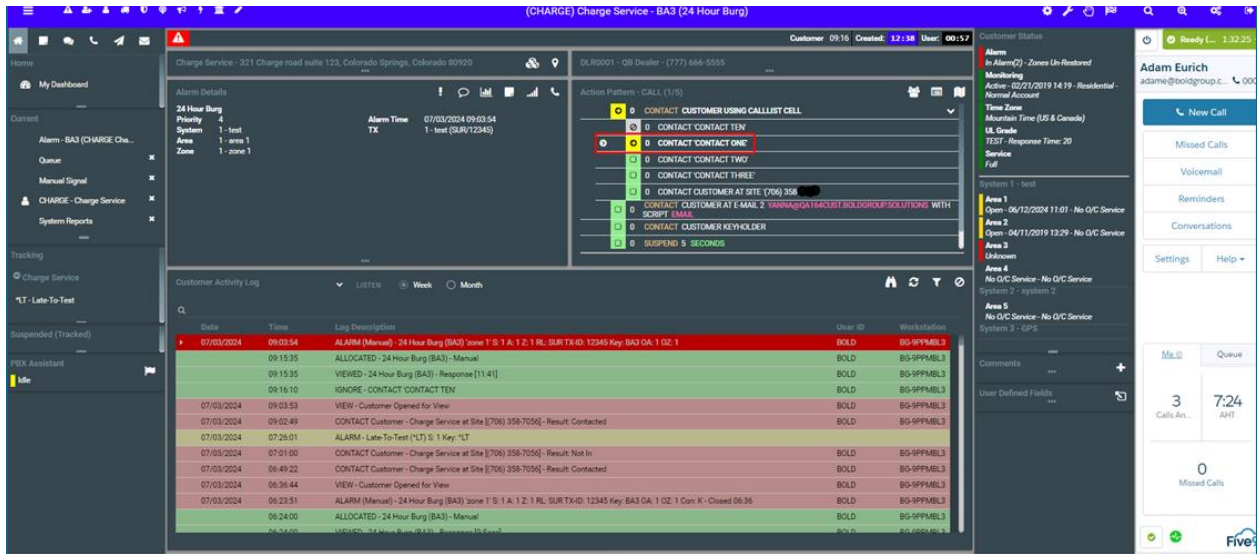

Select from the available contact points.
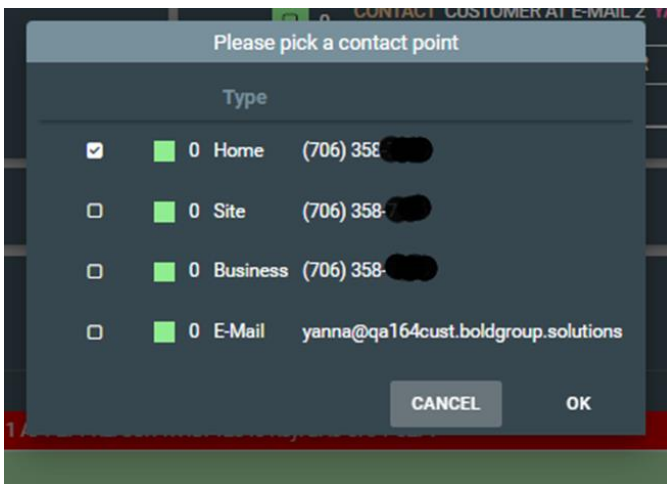
After clicking **OK** the phone number loads and begins dialing. During this time, you can click and navigate to anywhere in the web client and the call remains active. If the disposition of the Call is Contacted and the call is still active, once you chose to continue, it brings up the Password Validation box. Once the

Validation box is up, you are limited to the information within that validation box if you wish to remain on the line. From the validation box, when you click **Done** or **Cancel** the call is disconnected.
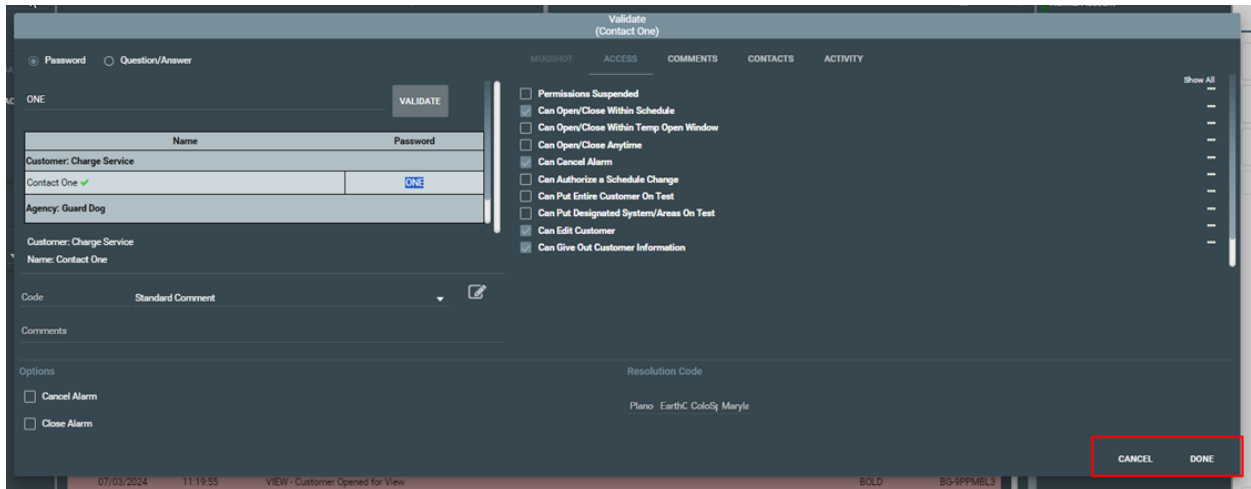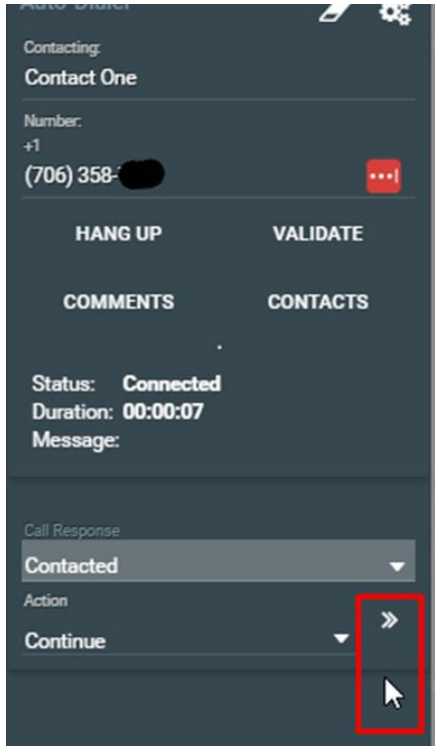
Use from the Actions Menu to Validate password or click the **Validate** button on the Dialer.
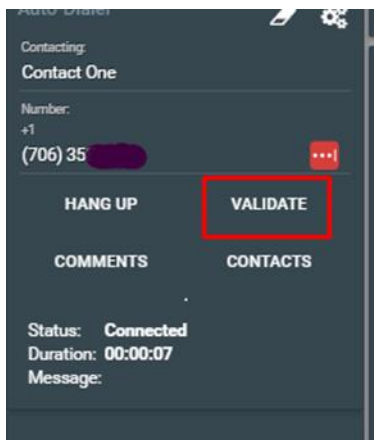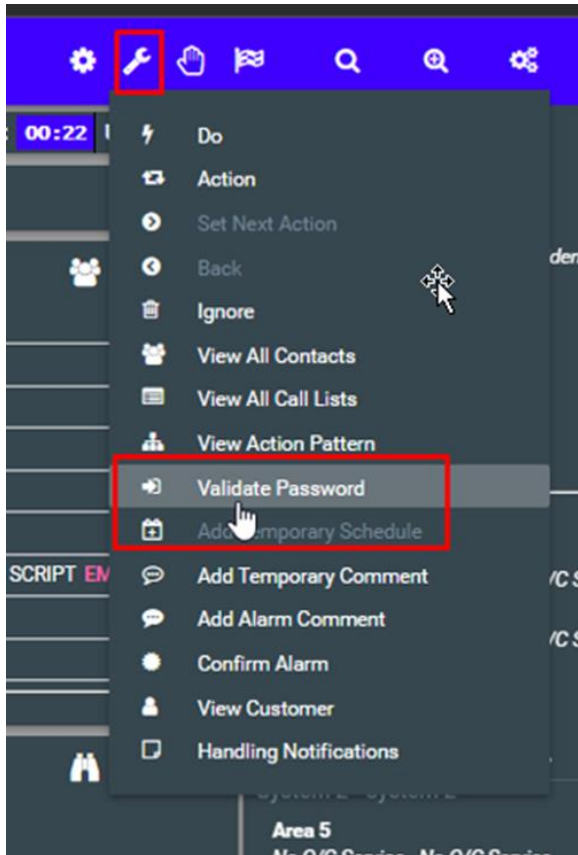
This brings up the same Validate Password dialog box but does NOT disconnect the call when clicking **Cancel** or **Done**. The call is disconnected only when clicking through any dialog boxes that occur after having clicked "Continue" in the Manitou dialer.

If the disposition is that of "Not In" or "Left Message" or any of the other disposition types that do not bring up the password validation box, when there is an active call, it disconnects as soon as you click **OK** or **Done** on any following message boxes. For example, if selecting "Not In", a message box asks if the action was completed. Regardless of the selection, as soon as you select Yes/No the call is disconnected. Another example would be if the disposition was "Left Message"; the next dialog asks if you would like to create a Notified Contact. The next dialog, regardless of what is chosen, asks if the action is complete. When you select Yes/No the call is disconnected.

The call can be ended and dispositioned in the Five9 dialer, but that does not set the disposition in Manitou. You are still required to select a disposition in the Manitou dialer and click **Continue**. Dispositioning the call in the Five9 dialer does not set the disposition in the Activity log in Manitou.

Notifications

You need to acknowledge system critical messages shown by the **Notification** icon:
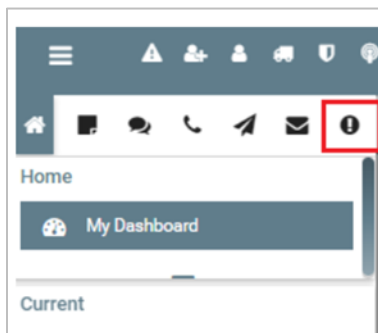
The icon does not show unless a critical notification is received. The **Notification** icon flashes red until the message is acknowledged. After you read the message, the icon stops flashing but remains in the navigation bar until you log out and log back in.

These are the system notifications that will cause the Notification icon to appear:

- Maintenance announced
- Station needs to be restarted
- Call quality changed
- Maintenance started
- Switch to the backup host
- Switch back to the primary host
- Maintenance completed
- Communication to VCC server was lost

- Server cannot receive events
- Duplicate WebSocket connection