



The Intelligent Cloud Contact Center

UC Adapters

Administrator's Guide

October 2025

Learn how to implement Unified Communications (UC) adapters in your domain.

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About Five9

Five9 is the leading provider of cloud contact center software, bringing the power of the cloud to thousands of customers and facilitating more than three billion customer interactions annually. Since 2001, Five9 has led the cloud revolution in contact centers, delivering software to help organizations of every size transition from premise-based software to the cloud. With its extensive expertise, technology, and ecosystem of partners, Five9 delivers secure, reliable, scalable cloud contact center software to help businesses create exceptional customer experiences, increase agent productivity and deliver tangible results. For more information visit www.five9.com.

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What's New

Release	Change	Topic
Oct 2025	Added images to show extension number requirement.	Support for Extension Number Dialing
Sep 2025	Added content for phone number extension dialing.	Support for Extension Number Dialing
	Added phone number extension requirements and import order.	About Teams Contacts and Groups
July 2025	Updated the Microsoft Teams group filter content to reflect new filtering options.	Enabling and Configuring Microsoft Teams in Admin Console About Teams Contacts and Groups Using Teams Resource Accounts for Call Queues and Auto Attendants
Mar 2025	Updated instructions for mapping Five9 agent presence to the agent presence in Zoom.	Enabling and Configuring Zoom Phone in Admin Console
	Updated instructions for mapping Five9 agent presence to the agent presence in Microsoft Teams.	Enabling and Configuring Microsoft Teams in Admin Console
Nov 2024	Updated the Microsoft Permissions Requested image and instructions.	Registering the Five9 UC Adapter for Microsoft Teams
	Added content for the bi-directional agent presence feature in Microsoft Teams.	Enabling and Configuring Microsoft Teams in Admin Console
	Updated the administrator role requirement for Microsoft Teams.	Licensing Requirements

Release	Change	Topic
	Removed the topic from the Microsoft Teams section.	Creating a User as a Service Account
Jul 2024	Added options for grouping Microsoft Teams contacts in the address book.	Enabling and Configuring Microsoft Teams in Admin Console
	Added content about contact limitations and group filters.	About Teams Contacts and Groups
	Added licensing requirements for Microsoft Teams.	Licensing Requirements
Apr 2024	Added content about support for Microsoft Teams resource accounts.	Using Teams Resource Accounts for Call Queues and Auto Attendants

Zoom Phone

This section describes how to prepare your implementation to use the Five9 UC Adapter for Zoom.

[Requirements](#)

[Creating a User as a Service Account](#)

[Installing the Application from Zoom App Marketplace](#)

[Enabling and Configuring Zoom Phone in Admin Console](#)

[Enabling the Zoom Adapter in Multiple Five9 Domains](#)

[Enabling Support for Zoom Phone Contacts with Extensions Only \(no DID\)](#)

[Managing Zoom Extension Dialing Support for Third-Party Transfers](#)

[Updating the Application for Existing Integrations](#)

Requirements

- Request that your domain be enabled for this UC Adapter. For more information, contact your Five9 representative.
- Before starting, obtain the Zoom administrator credentials that apply to your implementation.
- Obtain or configure a Five9 Administrator Console administrator user with at least the **uc.uc.Access UC Panel** permission.

Creating a User as a Service Account

Currently, a Zoom administrator can install or add the Zoom UC adapter from the Zoom App Marketplace. However, issues arise when the admin changes their password, enables multifactor authentication, or no longer has the admin role. These issues result in an invalid grant or invalid access token.

To avoid the issue, you can create a dedicated Zoom user as a service account for authorizing the adapter.

Note

Creating a user as a service account is optional. You can use a regular admin user to grant consent for the Five9 UC adapter app and it does not affect the integration capabilities and features. However, when there is a change to the regular admin user, you need to register the Five9 UC adapter again to fix the token error. The error should display for the adapter's status in Admin Console when it occurs.

To create a new role and a new user in Zoom Phone for the Zoom UC adapter:

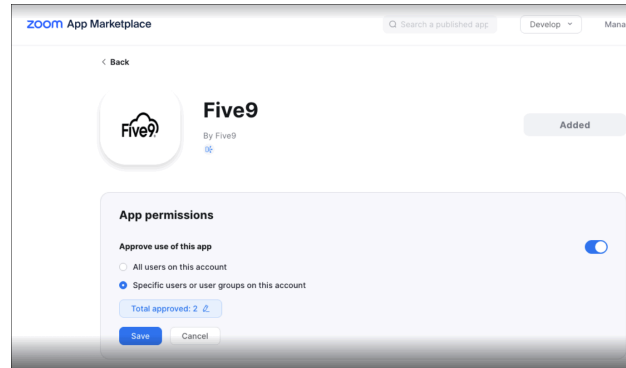
- 1 In Zoom Phone, go to **User Management > Roles** and add a new role. For example, use the role name *AdminUC* and the description *For authorizing Five9 Adapter*.

- 2 Go to **Role Settings** and enable the following settings for the newly added role:

Setting	Set to
User and Permission Management > Users	View and Edit
User and Permission Management > Contacts	View
Advanced Features > Marketplace	View and Edit
Zoom Phone > Phone Management	View

- 3 Click **Save**.
- 4 Create a new Zoom user, following your company password guidelines. The user should not belong to any group or department so that it won't appear in the Five9 address book. It's best to set the user password to never expire and not to enable multifactor authentication for the user.
- 5 Add the newly created user as a member of the newly added role.
- 6 Activate the user as instructed in the activation email, and use the new user account to log in to Zoom App Marketplace. Add the Five9 adapter as described in [Installing the Application from Zoom App Marketplace](#).
- 7 If the **Add** button is unavailable, add the user to the list of users who can add the

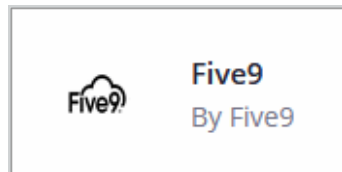
Five9 adapter.



Installing the Application from Zoom App Marketplace

You must install a Five9 app located in the Zoom App Marketplace. This app enables Five9 to gather the authentication data required to enable the adapter.

- 1 Obtain a Zoom administrator account.
- 2 Log into the [Zoom App Marketplace](#).
- 3 Locate and click **Five9 App** for your geographic region: Five9 for U.S., Five9-EU for EU, Five9-UK for UK, or Five9-CA for Canada.



- 4 In the **Five9 App** for the selected region, enable **Pre-approve**, and then click **Visit site to install**.



Five9
By Five9

Categories:
Collaboration

Five9 Zoom integration provides Five9 agents with easy access to Zoom contacts, their presence status and the ability to click-to-call Zoom contacts

Five9 has partnered with Zoom to provide a tighter integration between Five9 CCaaS and Zoom UCaaS solutions through a new Zoom UC Adapter. Using this UC Adapter,

[show more](#)

[Privacy Policy](#)

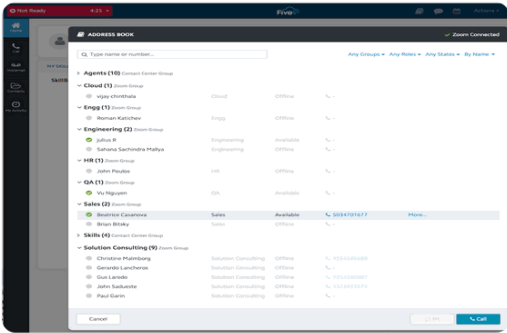
[Terms of Use](#)

[Support](#)

[Visit site to install](#)

Pre-approve ☒

Users on your account can install Five9. Disable this setting to disallow users from installing Five9.



This app requires the following scopes and [correspondent permissions](#) on your account.

- View all users' contacts
- View all user information

- 5 In the Five9 landing page, log in with your Admin Console account credentials, which are the same as your VCC Administrator account credentials.



3rd Party Authentication

Username

Password

[Login](#)

- 6 Follow the steps and click **Authorize**.

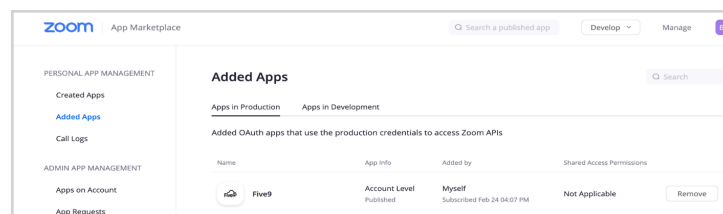
The **Authorization Successful** message displays.

Uninstalling the Application from Zoom App Marketplace

These instructions explain how to remove the app in a US domain. Ensure that you log in to the Zoom Marketplace domain where you installed the app.

To locate the app in the Zoom App Marketplace and remove it from the Zoom account:

- 1 Log in to <https://marketplace.zoom.us/> using an admin account.
- 2 Click **Manage**.
- 3 Select the **Added Apps** tab in the left panel.
- 4 Select the **Apps in Production** tab.
- 5 Select the Five9 app, and then click **Remove**



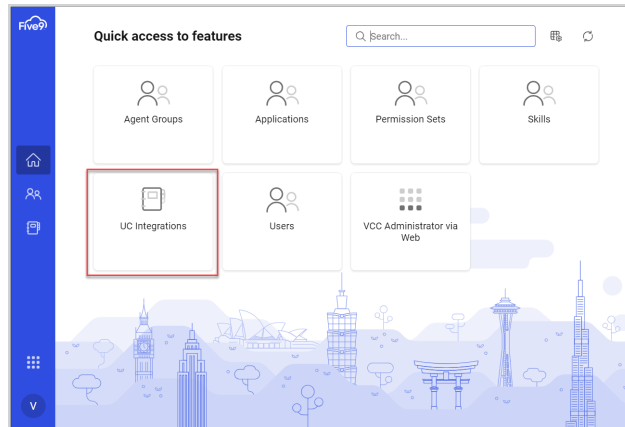
This removes the Five9 app from the Zoom account and all account-related data from the Five9 server.

Enabling and Configuring Zoom Phone in Admin Console

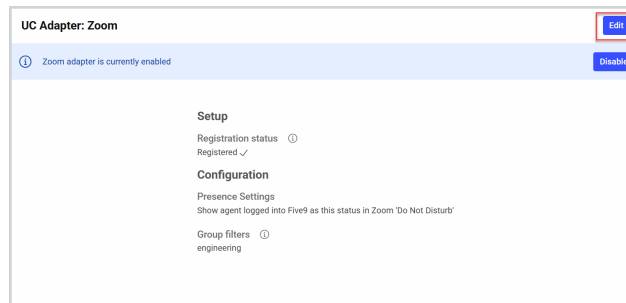
Once you connect Five9 to your Zoom account, configure and enable the adapter in the Five9 Administrator Console application.

- 1 Log in to Five9 Admin Console at <https://admin.us.five9.net> or your regionalized login URL.

- 2 Select the **UC Integrations** card on the Admin Console home page.



The **UC Adapter: Zoom** page displays. This page displays the current configuration settings.



- 3 To enable or disable the adapter, click the **Enable** or **Disable** button.

Note

You can enable or disable the adapter in Admin Console at any time after the initial configuration. To access the setting, select the Unified Communications card on the Admin Console home page. Use the toggle in the upper-right corner to enable or disable the adapter.

- 4 To configure the Zoom settings, click **Edit**.

The **Setup** page appears.

< UC Adapter: Zoom

Setup

Registration status ⓘ
Registered ✓

Configuration

Presence Settings: Define the agent's status presence in Zoom ⓘ

☒ Show agent presence in Zoom

When agent status on Five9 is: Agent Status
Logged In

Then show their status as: Zoom Status
Do Not Disturb

Group filters ⓘ

☐ No group filters

☒ Manual entry

engineering

Refer to the following sections to configure Zoom agent presence and group filters.

Note

You must complete the Zoom App Marketplace procedure described in [Installing the Application from Zoom App Marketplace](#) before you can configure any settings. If you have not successfully completed that procedure, you will see a **Registration Failed** error in Admin Console.

Configuring Zoom Agent Presence

The Zoom agent presence feature enables an agent's status in Zoom to change based on their Five9 status. You can configure how agent presence works for your organization.

- 1 On the **Setup** page described above, click **Edit**.

< UC Adapter: Zoom

Setup

Registration status ⓘ
Registered ✓

Configuration

Presence Settings: Define the agent's status presence in Zoom ⓘ

☒ Show agent presence in Zoom

When agent status on Five9 is: Agent Status
Logged In

Then show their status as: Zoom Status
On a call

- 2 To enable the display of agents' Five9 presence status in Zoom, under **Configuration > Presence Settings**, toggle on **Show agent presence in Zoom**. To disable the Five9 presence status in Zoom, toggle it off.
- 3 If you enabled agent presence in Zoom, do the following to indicate how you want the Five9 status to appear in Zoom. For example, you could map the Five9 **Logged In** status to **Do Not Disturb** so an agent who is logged in to Five9 appears as **Do Not Disturb** in Zoom. Or, for example, you could map an agent on a call in Five9 as **On a call** in Zoom.
 - a Next to **When agent status on Five9 is**, select the Five9 agent status that you want to map to a Zoom status.
 - b Next to **Then show their status as**, select the Zoom status to display.

Note

Do Not Disturb automatically sends Zoom calls coming into Zoom Phone to voicemail without notifying the agent.

- 4 Click **Save** and confirm your changes.

Note

The setting becomes active the next time agents handle a Five9 call or log in.

Configuring the Group Filter

The group filter feature lets you import a comma-separated list of Zoom departments (such as Engineering, Finance, Product Management) into the Five9 address book.

It is important to note that:

- Names must exactly match the department names as they appear in the Zoom directory.
- Entries are not case-sensitive.
- If this field is left blank, all departments are imported.
- Making changes to the Group Filter list in large directories may take a few minutes to take effect.

- 1 Open the **UC Adapter: Zoom Setup** page as described above.
- 2 Under **Group filters**, select either **No group filters** or **Manual entry**.
- 3 If you selected manual entry, enter a list of Zoom department names.
- 4 Click **Save** and confirm your changes.

Enabling the Zoom Adapter in Multiple Five9 Domains

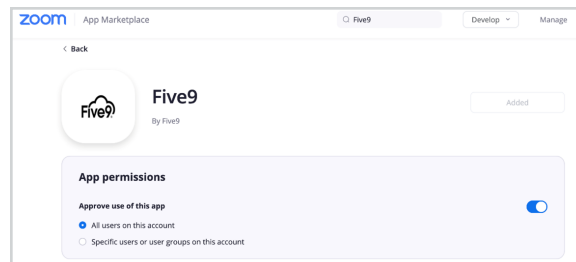
This section describes enabling the adapter for each Five9 domain for a single Zoom account (known as Zoom Tenant).

- Enabling domains

Use a separate Zoom admin credential and Five9 Administrator Console credential for each Zoom authorization step. Only use Zoom admin credentials for one Five9 domain. For example, to enable two Five9 domains on a single Zoom account, use your Zoom-admin1 account and Zoom-admin1 credentials for the first Five9 domain, and Zoom-admin2 account and Zoom-admin2 credentials for the second Five9 domain. Use this method for all Five9 domains in your environment.
- Admin Console changes for the adapter
 - Configure Admin Console parameters for each Five9 domain separately.
 - Each Five9 domain Admin Console configuration can use a different group filter setting.

For example, in Five9 Domain1 you can choose to only display Zoom contacts in the agent address book for Zoom departments Dept1 and Dept2, and in Five9 Domain2 only display Zoom contacts for Zoom departments Dept3 and Dept4.
- Capacity
 - The maximum number of UC contacts you can import into the Five9 address book is 22,000 for each Five9 domain.

- Use the group filter setting to limit the number of contacts in the address book.
- Zoom app permissions for admins
 - Select **All users on this account** when setting up the app in the Zoom App Marketplace to ensure that all Zoom admins can enable the Five9 adapter.



- Select **Specific users or user groups on this account** and complete the *Add users* form to restrict who can enable the Five9 adapter.

Note

You must have groups defined in your Zoom account to add user groups.

Enabling Support for Zoom Phone Contacts with Extensions Only (no DID)

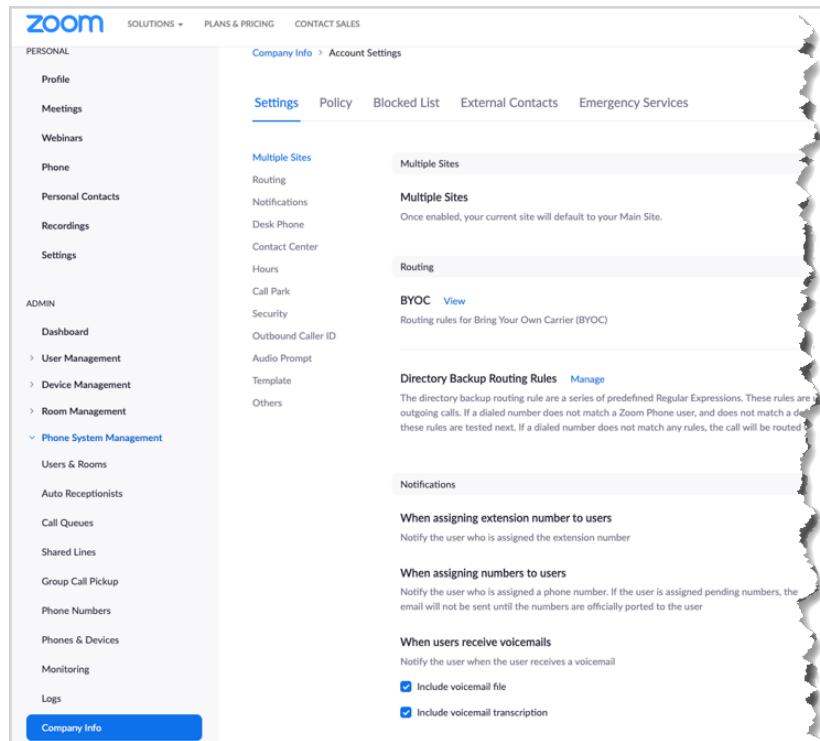
This describes how to enable the capability for agents to transfer calls to Zoom Phone contacts that have an extension number but no DID.

Note

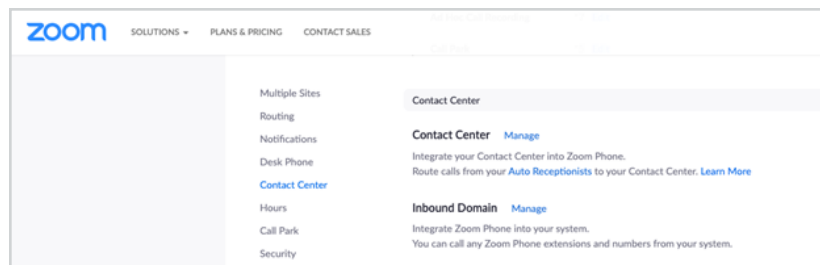
This feature is only available in environments deploying Five9 Telephony Connect (SIP Trunk).

Adding the Inbound Domain

- 1 In Zoom, navigate to **Admin > Phone System Management > Company Info.**



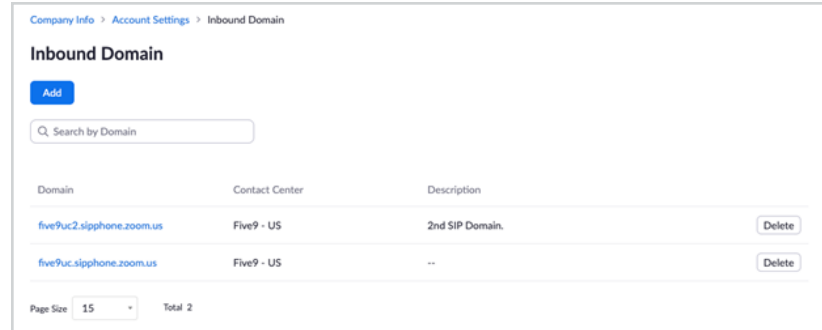
- 2 Go to **Account Settings > Contact Center.**



Note

If you do not see the Contact Center option, contact your Zoom representative.

- 3 Click the Inbound Domain **Manage** link.
The Add Inbound Domain window displays.



4 Click **Add** and complete the following fields:

- **Domain:** Enter your SIP domain name in the following format:
<yourcompanyname>uc.sipphone.zoom.us
For example, five9uc.sipphone.zoom.us
- **Contact Center:** Select a Five9 contact center for the region of your domain.

The screenshot shows the 'Add Inbound Domain' form. It has three main fields: 'Domain', 'Contact Center', and 'Description (Optional)'. The 'Domain' field contains 'five9uc' and '.sipphone.zoom.us'. The 'Contact Center' field is a dropdown menu with 'Select' as the current selection. A dropdown menu is open, showing a list of contact centers: 'Five9 - Dublin', 'Five9 - EMEA', 'Five9 - SaoPaulo', 'Five9 - Sydney', 'Five9 - Tokyo', 'Five9 - US' (which is highlighted), and 'Genesys Cloud AP-Northeast-1'.

Note

This change takes effect in the Five9 address book on the following day.

Deleting the Inbound Domain

To revert to only importing Zoom Phone contacts that have DID numbers, click the Delete button for the desired inbound domain.

Zoom Call Queues, Auto-Receptionists, and Common Area Phones

By default, the Five9 address book can import Zoom call queues, auto-receptionists, and common area phones. These options display under the group headings, *Call Queues*, *Auto-Receptionists*, *Common Area Phones*.

If you do not want Zoom Call Queues, Auto-Receptionists, and Common Area Phones to appear in the address book, use the Group Filter parameter in Admin Console. This displays only the Zoom departments listed in the Group Filter in the address book.

In Zoom, set Call Queues to the Inactive state.

Call Queues

[Add](#) [Export](#)

Q Search by Name, Ext. or Number

☐ Only show Internal Safety Response Team

Apply Template

☐	Name ▾	Ext. ▾	Number(s)	Status
☐	Call QueuesTest	816	+44 1280 474142 (925) 633-4313	Inactive

Page Size **15** Total 1

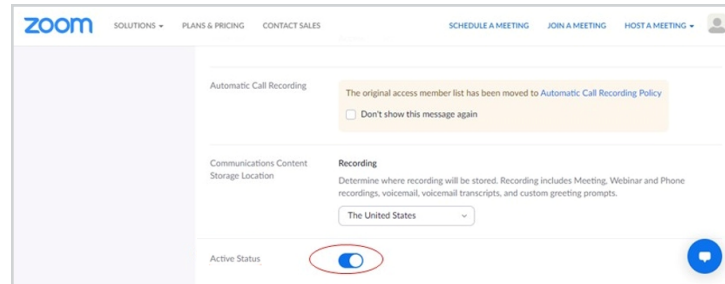
Note

Set Call Queues to **Active Status** to display call queues in the address book. Inactive call queues are not in the address book.

To change a Call Queues group to Active Status:

- 1 Log in to Zoom as administrator.
- 2 Navigate to **Phone System Management > Call Queues** and select the desired entry.

- 3 Scroll to the **Active Status** section and enable the option.



Managing Zoom Extension Dialing Support for Third-Party Transfers

In interactive voice response (IVR) workflow, inbound calls can be routed to Zoom via Zoom extension numbers. You must configure settings in Zoom and VCC Admin to activate this feature. You will configure call variables, configure an IVR workflow, and create pseudo numbers in VCC Admin.

Note: Add inbound domain and Zoom Telephony Connect (SIP Trunk) before configuring the Zoom extension in IVR. See [Enabling Support for Zoom Phone Contacts with Extensions Only \(no DID\)](#)

Configuring Zoom Call Variables

- 1 In the left pane of VCC Admin, right-click **Call variables**, and then select **Add call variable group**.
The **New Call Variable Group Properties** window displays.
- 2 In the **General** field, remove **New Call Variable Group**, insert **zoom**, and then select **Save**.
- 3 Create the **ext_dialing** variable:

- a Right-click the **zoom** call variable group, and then select **Add call variable**.
 - b In the first field of the **General** tab, delete **New call variable**, and then type **ext_dialing** for the variable name.
 - c In the **Description** field, type **Zoom Extension Dialing feature flag**.
 - d In the **Data type** menu, select **String**.
 - e In the **Default value** menu, select **Value**, type **Disabled**, and then select **Save**.
- 4 Create the **ext_number** variable:
 - a Right-click the **zoom** call variable group, and then select **Add call variable**.
 - b In the first field of the **General** tab, delete **New call variable**, and then type **ext_number** for the variable name.
 - c In the **Description** field, type **Dial-able pseudo phone number for Zoom extension**.
 - d In the **Data type** menu, select **String**.
 - e In the **Default value** menu, select **Undefined**, and then select **Save**.
- 5 Create the **inbound_domain** variable:
 - a Right-click the **zoom** call variable group, and then select **Add call variable**.
 - b In the first field of the **General** tab, delete **New call variable**, and then type **inbound_domain** for the variable name.
 - c In the **Description** field, type **Zoom SIPphone domain**.
 - d In the **Data type** menu, select **String**, and then select **Save**.
 - e In the **Default value** menu, select **Value**, enter the Zoom SIP domain name link, and then select **Save**.

Important: You must use the same Zoom SIP domain link that you developed in [Enabling Support for Zoom Phone Contacts with Extensions Only \(no DID\)](#)

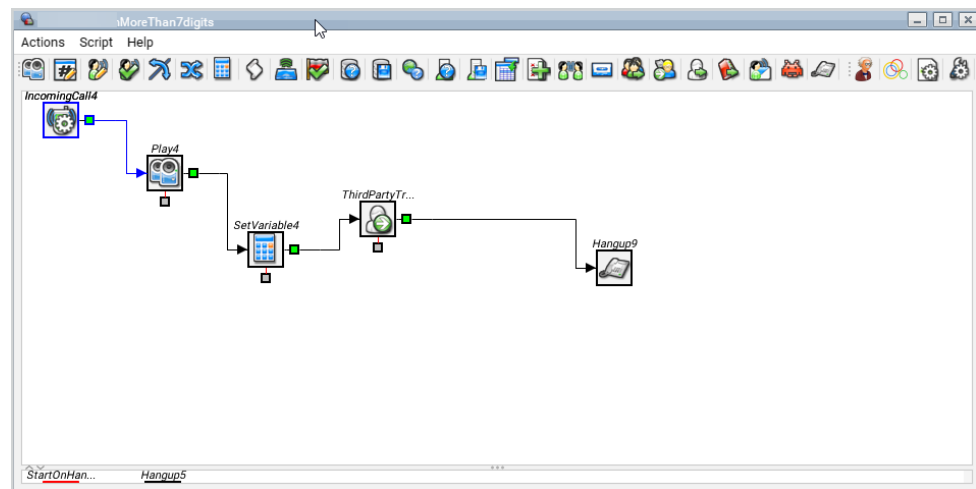
Configuring the IVR Workflow

- 1 In the left pane, select **IVR Scripts**, and then select the IVR workflow for the Zoom extension.

The IVR workflow must contain a **ThirdPartyTransfer** module.

Note: If your IVR workflow is not available, see the [Basic Configuration Administrator's Guide](#).

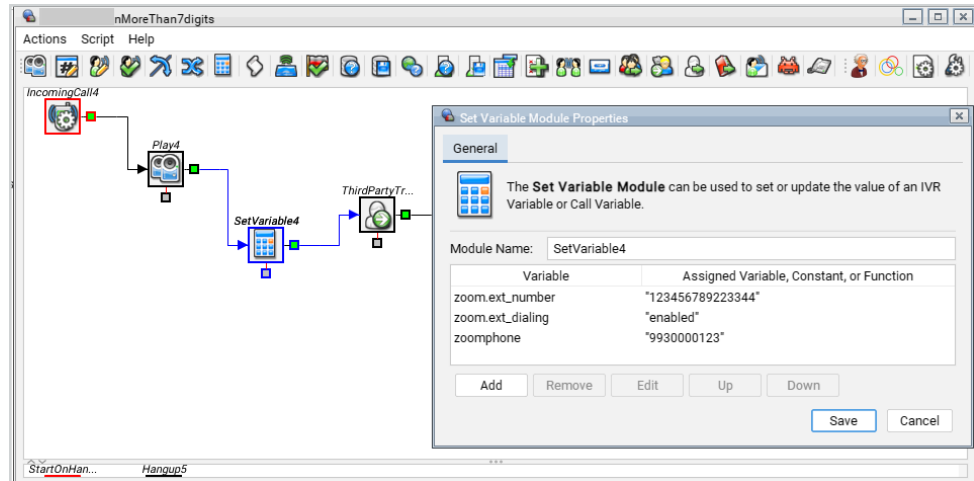
A new workflow window opens.



- 2 Select the **zoom.ext_dialing** variable, and then select **Edit**.
The **Assignment** window opens.
- 3 In the **Assigned Value** field, select **Constant**, enter **enabled**, and then select **OK**.
- 4 Select the **SetVariable** icon that immediately precedes the **ThirdPartyTransfer** icon.

Note: If the **SetVariable** icon is not in your workflow, you can drag and drop the **SetVariable** icon into your workflow from the toolbar.

The **Set Variable Module Properties** window opens.



5 Select **Save** in the **Set Variable Module Properties** window.

Developing Pseudo Phone Numbers

Use the Zoom extension to create a 10-digit pseudo phone number. Based on the length of your zoom extension, follow instructions for **zoom extensions with three and seven digits** or **zoom extensions with greater than seven digits**.

Note: Locate Zoom extension numbers in Zoom: **Admin > Phone systems management > Phone numbers > Assigned**

Digits	Domain	Country Code	Zoom Extension	Sample Pseudo Number
Phone numbers with 1-7 digits	E164	+1 (US)	1235	+19940001235
		+44 (EU/UK)		+449940001235
Phone numbers with 1-7 digits	non-E164		1235	9940001235
Phone numbers with more than 7	E164	+1 (US)	123456789223344	+19930000123
		+44 (EU/UK)	123456789223344	+449930000123

Digits	Domain	Country Code	Zoom Extension	Sample Pseudo Number
digits				
Phone numbers with more than 7 digits	non-E164		123456789223344	9930000123

Zoom Extensions with Three to Seven Digits

- 1 Select the **zoom.ext_number** variable, and then select **Edit**.
The **Assignment** window opens.
- 2 In the **Assigned Value** field, select **Constant**, enter a 10-digit pseudo phone number, and then select **OK**.

Important: A pseudo number format must match the domain format. For E164 domains, insert “+1” for US or “+44” for EU/UK in front of the 10-digit number. For non-E164 domains, use a 10-digit number.

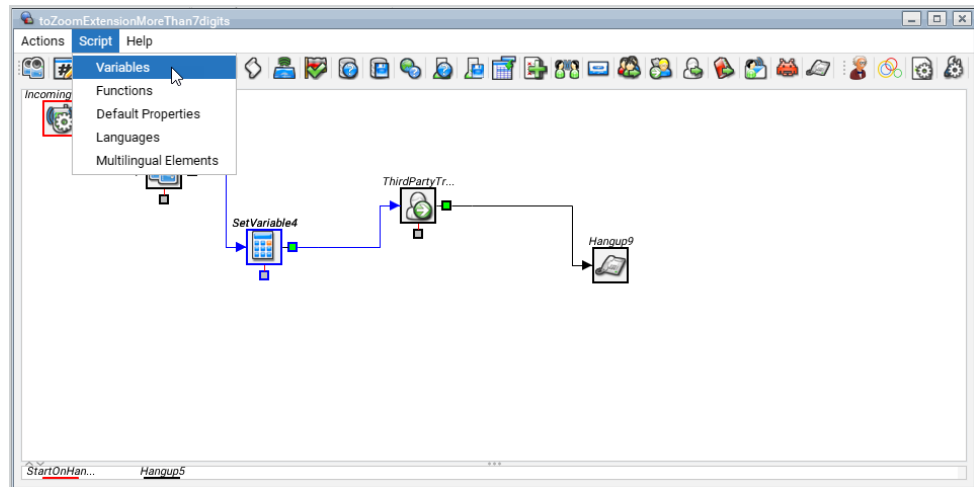
Note: To create a 10-digit pseudo phone number, insert additional zeros in front of the zoom extension number using following format: 99 + <length of extension number> + <padding zeros> + <extension number>. If a domain requires a country code, insert the county code in front of the 10-digit pseudo phone number.

- 3 Select **Save** in the **Set Variable Module Properties** window.
- 4 Open the **ThirdPartyTransfer** Module.
- 5 In the **General** tab, in the **Third Party Number** field, select **Variable** > **zoom.ext_number**, and then select **Save**.

Zoom Extensions with More than Seven Digits

- 1 Select the **zoom.ext_number** variable, and then select **Edit**.
The **Assignment** window opens.
- 2 In the **Assigned Value** field, select **Constant**, enter the zoom extension number, and then select **OK**.

- 3 In the **Set Variable Module Properties** window, select **Save**.
- 4 In the IVR workflow, select **Script > Variable**.



A new window opens.

- 5 Select **Add**.
The **Variable** window opens.
- 6 Enter **zoomphone** in the Name field, select **OK**, and then select **OK** again.
- 7 Open the **Set Variable Properties** window, and then select **Add**.
The **Assignment** window opens.
- 8 In the **Variable** field, select **zoomphone**.
- 9 In the **Assigned Value** field, select **Constant**, enter a pseudo phone number, and then select **OK**.

Important: A pseudo number format must match the domain format. For E164 domains, insert “+1” for US or “+44” for EU/UK in front of the 10-digit number. For non-E164 domains, use a 10-digit number.

- 10 In the **Set Variable Module Properties** window, select **Save**.
- 11 Select **Save** in the **Set Variable Module Properties** window.
- 12 Open the **ThirdPartyTransfer** module.

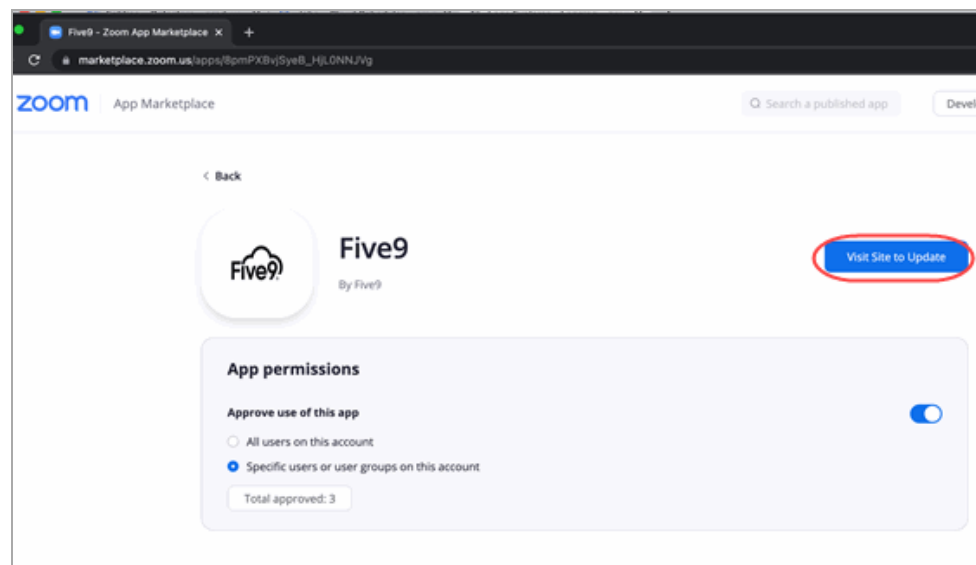
- 13 In the **General** tab, in the **Third Party Number** field, select **Variable > zoomphone**, and then select **Save**.

Note: After completing these steps, contact Five9 Professional Services or the implementation team to create routing rules for Zoom extension calls.

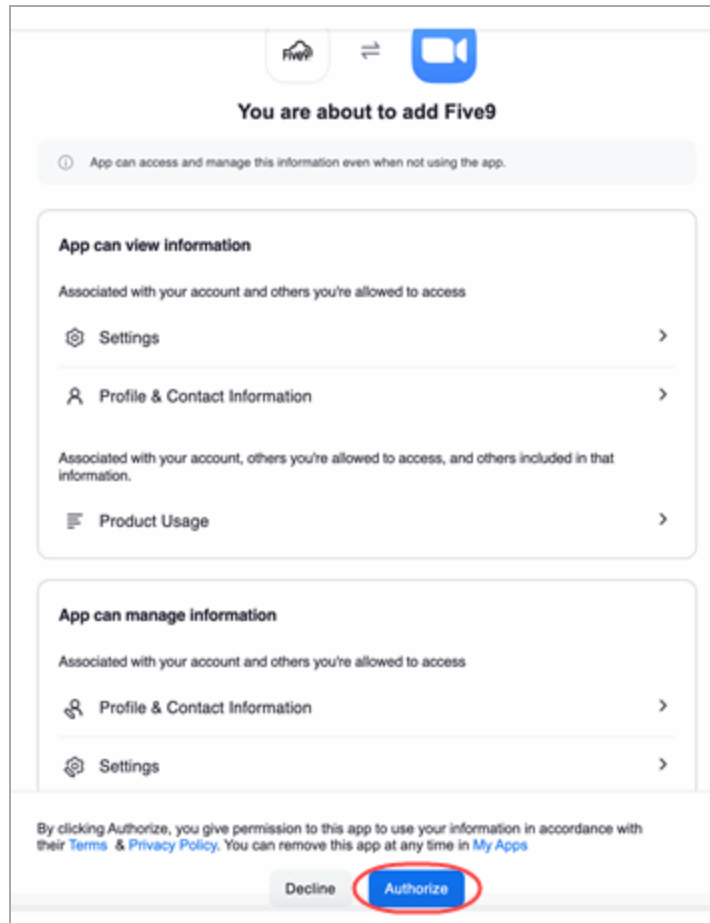
Updating the Application for Existing Integrations

To activate the Agent Presence feature, existing Five9 integrations must update the API permissions for the adapter from the Zoom App Marketplace. New users enabling the adapter for the first time will get the needed API permissions and do not need to go through this process. For existing users, follow these steps to update the API permissions for the Zoom adapter application:

- 1 Go to Zoom App Marketplace and search for the Five9 app.
- 2 Click **Visit Site to Update**.



3 Click **Authorize**.



Microsoft Teams

This section describes how to prepare your implementation to use the Five9 UC Adapter for Microsoft Teams so that Five9 agents can see the presence of Microsoft Teams contacts and call them.

Before starting, ensure that you have your Microsoft Teams credentials and the domain provided by your Microsoft vendor (such as, example.com).

[Licensing Requirements](#)
[Registering the Five9 UC Adapter for Microsoft Teams](#)
[Enabling and Configuring Microsoft Teams in Admin Console](#)
[About Teams Contacts and Groups](#)
[Using Teams Resource Accounts for Call Queues and Auto Attendants](#)
[Enabling the Adapter in Multiple Five9 Domains](#)
[Configuring SIP Trunk for Microsoft Teams](#)
[Support for Extension Number Dialing](#)

Licensing Requirements

The Five9 Teams adapter only imports Microsoft Teams users with assigned Microsoft 365 licenses, such as E1, E3, or E5. The adapter filters out users without one of the licenses.

If you plan to enable the Teams Telephony Connect option or Direct Routing for the adapter, the Microsoft Phone System license is also required for the Teams users who need to be imported into the Five9 address book.

Note

You can purchase the Microsoft Phone System license as an add-on if it is not included in the Microsoft 365 license bundle.

Other Requirements

- Request that your domain be enabled for this UC adapter. For more information, contact your Five9 representative.
- Obtain or configure an Admin Console administrator account with at least the **uc.uc.Access UC Panel** permission.

Group	Subset	Permission	Description
uc	uc	Access	Access Unified Communications in Admin Console.

- The admin in your organization (not Five9 personnel) must register the app. The admin must have a Microsoft Teams account with the Global Administrator role for granting consent for the Five9 UC adapter.

Registering the Five9 UC Adapter for Microsoft Teams

This content describes how to use a global administrator role to register the Five9 UC adapter application in Microsoft Entra ID (formerly Microsoft Azure Active Directory).

Note

A global MS Teams administrator in your organization must perform this step. Five9 can't perform this step for you.

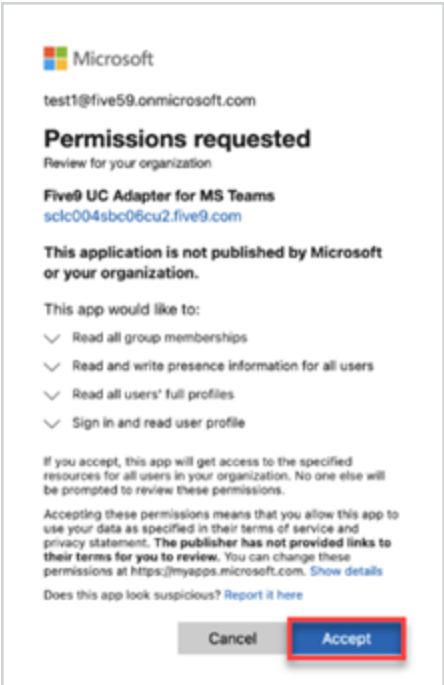
- 1 To initiate the Microsoft app registration process, navigate to <https://uc.five9.net/?vendor=msteams>.
- 2 When prompted to authenticate access to your Five9 administrator application, enter your Five9 administrator credentials.

If your domain is Europe (EU or UK) or Canada, click the appropriate link in the lower portion of the login page.



The image shows the login interface for Five9 Cloud Contact Center Software. At the top is the Five9 logo and the text "Cloud Contact Center Software". Below this are input fields for "Username" and "Password", each with a toggle for visibility. A "LOG IN" button is centered below the fields. Underneath the button is the text "Not a US Domain?" followed by three buttons: "Europe", "UK", and "Canada". The "Europe" button is highlighted with a red rectangular border.

- 3 On the Microsoft **Permissions Requested** page, review the permissions and then click **Accept**.



The image shows a Microsoft "Permissions requested" dialog box. At the top is the Microsoft logo and the email address "test1@five9.onmicrosoft.com". The title is "Permissions requested" with the subtitle "Review for your organization". The application name is "Five9 UC Adapter for MS Teams" with the ID "scl004sbc06cu2.five9.com". A warning states: "This application is not published by Microsoft or your organization." Below this, it lists permissions the app wants: "Read all group memberships", "Read and write presence information for all users", "Read all users' full profiles", and "Sign in and read user profile". A note explains that accepting grants access to these resources. It also mentions that the publisher has not provided links to their terms for review. At the bottom are "Cancel" and "Accept" buttons, with the "Accept" button highlighted by a red rectangular border.

Authorization is confirmed when the **Authorization Successful** message appears.

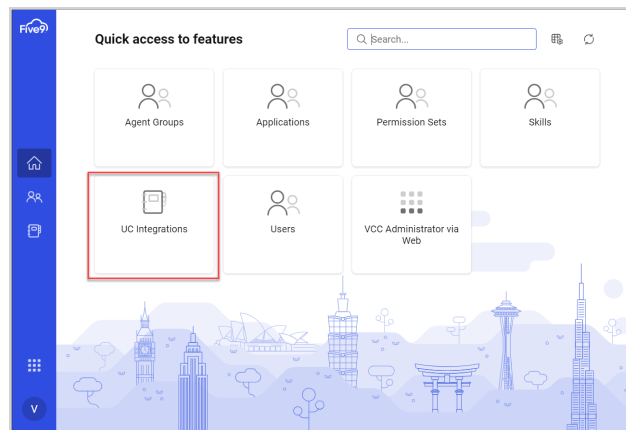
Enabling and Configuring Microsoft Teams in Admin Console

Once you connect Five9 to your Teams account, configure and enable the adapter in the Five9 Administrator Console application.

Note

Before you configure the Teams adapter, make sure there are no groups with the character \$ in their name. This character can't be part of a Teams group name because it has a special meaning in the Five9 adapter.

- 1 Log in to Five9 Admin Console at <https://admin.us.five9.net> or your regionalized login URL.
- 2 Select the **UC Integrations** card to display the **UC Adapter: Microsoft Teams** page.



The **UC Adapter: Microsoft Teams** page displays the current configuration settings.

UC Adapter: Microsoft Teams

Microsoft Teams adapter is currently enabled

Setup

Registration status ⓘ
Registered ✓

Call routing options
Trunk Value: Microsoft Teams Telephony Connect

Configuration

Presence Settings
Show agent on Five9 call as 'Busy' in MS Teams

Group filters ⓘ
engineering
resource accounts
sales

Contacts Grouping Options ⓘ
Display all contacts under a single umbrella group

- 3 To enable or disable the adapter, click the **Enable** or **Disable** button.

Note

You can enable or disable the adapter in Admin Console at any time after the initial configuration. To access the setting, select the **UC Integrations** card on the Admin Console home page.

- 4 To configure the Teams settings, click **Edit**.

The **Setup** page appears.

UC Adapter: Microsoft Teams

Setup

Registration status ⓘ
Registered ✓

Call routing options
☐ No SIP trunk (PSTN charges will apply)
☒ Microsoft Teams Telephony Connect
☐ Other, enter SIP Trunk value
aa129336

Configuration

Presence Settings: Define the agent's status presence in Microsoft Teams ⓘ

☒ Show agent presence in Microsoft Teams

When agent status on Five9 is: Agent Status
On Five9 call

Then show their status as: Microsoft Teams Status
Busy

Refer to the following sections to configure Microsoft Teams call routing options, agent presence, and group filters.

[Configuring Call Routing Options](#)

[Configuring Teams Agent Presence](#)

[Configuring the Group Filters](#)

Note

You must complete the procedure described in [Registering the Five9 UC Adapter for Microsoft Teams](#) before you can configure any settings. If you have not completed that procedure, you will see a **Registration Failed** error in Admin Console.

Configuring Call Routing Options

The Routing Options feature allows you to select how calls from agents to Teams contacts should be routed. The options are:

- **No SIP trunk (PSTN charges will apply)**
- **Microsoft Teams Telephony Connect**
- **Other, enter SIP Trunk value**

The options are described below. Contact your Five9 representative to configure Microsoft Teams Telephony Connect and the "Other, enter SIP Trunk value" option.

No SIP Trunk Option

If you select the **No SIP Trunk** value under **Call routing options**, calls are routed over PSTN and toll charges will apply.

Note

Do not change this value in existing Teams adapter integrations.

Microsoft Teams Telephony Connect Option

If you select the **Microsoft Teams Telephony Connect** option under **Call routing options**, use **aa129336** as the SIP trunk value.

Other Option

If you select the **Other** option under **Call routing options**, enter the SIP trunk value.

Option	SIP Trunk Value
Netrix SIP Trunk for Teams transfers (Five9 Netrix/Tetra Connector)	a115167
CallTower SIP Trunk for Teams transfers (Five9 CallTower Connector)	a123838
Nuwave SIP Trunk for Teams transfers (Five9 SIP to PBX with Nuwave)	a133131

If you are using a private SIP trunk to a Microsoft Direct Routing partner, enter that SIP trunk value.

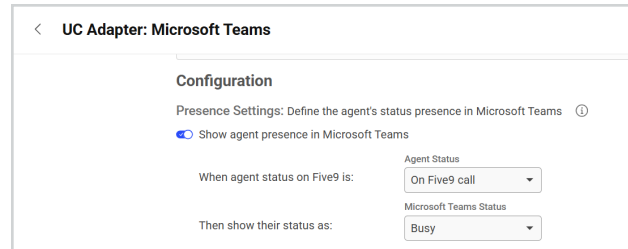
If none of the above options apply to your configuration, select **No SIP Trunk** or contact your Five9 implementation team.

Configuring Teams Agent Presence

Five9 agents can view the presence status of MS Teams users, and with the MS Teams agent presence feature enabled, MS Teams users can view the presence status of Five9 agents. An MS Teams user, for example, might want to see if an agent is busy or available.

The feature is disabled by default. You can enable it in Admin Console.

- 1 In Admin Console, select the **UC Integrations** card on the home page to display the **UC Adapter: Microsoft Teams** page.
- 2 Select **Edit** and then scroll down to **Configuration**.



< UC Adapter: Microsoft Teams

Configuration

Presence Settings: Define the agent's status presence in Microsoft Teams ⓘ

☒ Show agent presence in Microsoft Teams

When agent status on Five9 is: Agent Status
On Five9 call

Then show their status as: Microsoft Teams Status
Busy

- 3 To enable the display of agents' Five9 presence status in Teams, under **Configuration > Presence Settings**, toggle on **Show agent presence in Teams**. To disable Five9 agent presence status, toggle it off.
- 4 If you enabled Five9 agent presence in Teams, do the following to indicate how you want the Five9 status to appear in Teams. For example, you could map the Five9 **Logged In** status to **Busy** so agents logged in to Five9 appear as busy in Teams. Or, for example, you could map the Five9 **On a call** status to **Do not disturb** in Teams.
 - a Next to **When agent status on Five9 is**, select the Five9 agent status that you want to map to a Teams status.
 - b Next to **Then show their status as**, select the Teams status to display.

Note

The setting becomes active the next time agents handle a Five9 call or log in.

- 5 Click **Save** and confirm your changes.

Note

If your Teams adapter was registered before the release of this bi-directional presence feature, you must re-register it the first time you need to use this feature in order to grant the appropriate API permissions. To register the adapter, see [Registering the Five9 UC Adapter for Microsoft Teams](#).

Configuring the Group Filters

The group filter lets you import contacts from custom groups (such as Engineering and Sales) and categories of Microsoft Entra ID groups (such as Resource Accounts and Microsoft 365) into the Five9 address book and specify how to arrange them.

For more information about using group filters, see [About Teams Contacts and Groups](#).

Note

Making changes to the Group Filter list in large directories may take a few minutes to take effect.

- 1 On the **UC Adapter: Microsoft Teams Setup** page, under **Group filters**, select either **No group filters** or **By Group Categories and/or specific group names**.
If you select **No group filters**, all Teams-enabled groups are imported when you click **Save**.
- 2 If you selected to import by group category and/or group name, select any of the Microsoft group categories you want to import.

- 3 Under **Search for a specific group name**, use the search field to find the custom groups you want to import. The search results appear in the **Available** box.

- 4 When a group you want to import appears in the **Available** list, select the right arrow to move it to the **Selected** list. The groups in the **Selected** list are the ones to import. If you have several groups to move, use the **All/None** link at the top of the list.

Likewise, remove any groups you don't want to import from the **Selected** list by selecting the groups and using the left arrow or using the **All/None** link at the top of the list.

- 5 Under **How would you like to organize your Teams contacts in the Address Book**, select to organize by group names, department names, or include all contacts in a single MS Teams Contacts group.

Note

This grouping option is only for configuring how to group and display contacts in the address book. It doesn't affect the process of importing contacts.

- 6 Click **Save** and confirm your changes.

Note

For large enterprises with thousands of contacts, changes to the Group filter may take up to 20 minutes to process. Until the changes are fully processed, the address book will not reflect the changes.

About Teams Contacts and Groups

The Five9 Teams UC adapter uses Microsoft Graph APIs to retrieve customer Teams user data and is limited by the kind and rate of data provided by the APIs. The Five9 adapter applies certain filters and limitations before displaying the contact information in the Five9 address book.

For more information about setting the options described here, see [Enabling and Configuring Microsoft Teams in Admin Console](#).

Number of Contacts Supported

The maximum number of contacts supported in the Five9 address book is 22,000. Customers with a larger number of contacts that meet the criteria must use the Group Filter parameter of the adapter configuration to bring the number of contacts in the Five9 address book down to 22,000. Therefore, support of a Microsoft tenant with total number of Teams contacts greater than 22,000 is only possible using a group filter.

Note

If the number of imported contacts exceeds 22,000, you may experience degraded system performance, connection issues, and other anomalies.

This table describes the various group filters options in Admin Console and explains what does and doesn't count toward the 22,000 contacts limit.

Group filters option	What counts toward the 22,000 contacts limit	What doesn't count toward the 22,000 contacts limit
No group filters	Contact belongs to at least one Teams group of type Office365 with Teams Status enabled.	Contact only belongs to non-Teams-enabled groups, like Distribution or Security groups.
Custom categories or group names	If group names are specified or categories are selected, contacts belong to one of those groups or categories.	Contact belongs to multiple Teams groups (only counts as one).
Either of the options	Contact has a valid PSTN-dialable number assigned in either Office Phone or Mobile Phone field in Teams.	Contact does not have a number configured in either of the phone fields in Microsoft Entra ID.

Phone Number and Extension Number Requirements

Teams contacts that count as part of the 22,000 limit must have a valid PSTN dialable number (not an abbreviated extension) assigned to them in the Office Phone or Mobile Phone fields of Microsoft Entra ID (previously Azure AD) as shown below. If the Office Phone field contains a valid number, the Mobile Phone field is ignored.

The phone number can be:

- A string of digits, for example: 4089094439
- In area code format, for example: (408) 909-4439
- In E.164 format, for example: +1 408 9094439

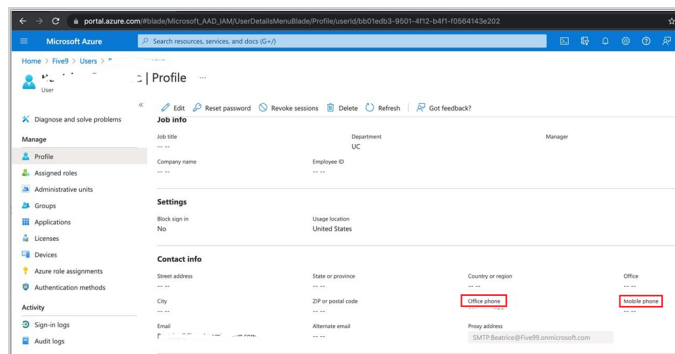
Phone numbers with extensions must use one of these formats:

- `+<phone number>;ext=<extension>`
- `+<phone number>x<extension>`

For more information about extension number dialing, see [Support for Extension Number Dialing](#).

The adapter address book does not support Teams contacts with only an extension number.

To see where the Teams adapter imports user phone numbers, view the Users panel in Microsoft Entra ID.



Data is considered and imported in this order:

- 1 If the business number plus the extension number is present, that number plus the extension is imported.
- 2 If not, and the business PSTN number is present, the business PSTN number is imported.
- 3 If neither the business number plus extension or the business PSTN are present, and the mobile phone number is present, the mobile phone is imported.

Contacts Belonging to Multiple Groups

It is common for a Teams contact to belong to multiple Teams groups. The Five9 address book only shows such contacts under one of the groups by lexicographic order. An agent searching for a particular contact should use the hot search window to search for the contact by name if they do not know which group the contact appears in.

Note

You can create a new Teams group of Office 365 type and assign all the contacts you want to be seen in the Five9 address book to that group and only that group. Then, once you enter the name of the new group in the Group Filter field of the Admin Console adapter configuration, all of those contacts will appear in the Five9 address book.

Supported Teams Group Types

The Group Filter feature is not configured by default. To use the adapter with the Group Filter default option, Teams contacts must belong to at least one Teams group of type Office 365 with the Teams status icon enabled as shown below.

Note

You can create a Teams-enabled group by selecting the option to add Microsoft Teams to your group when creating a new Microsoft 365 type group.

Group Filter Feature Used

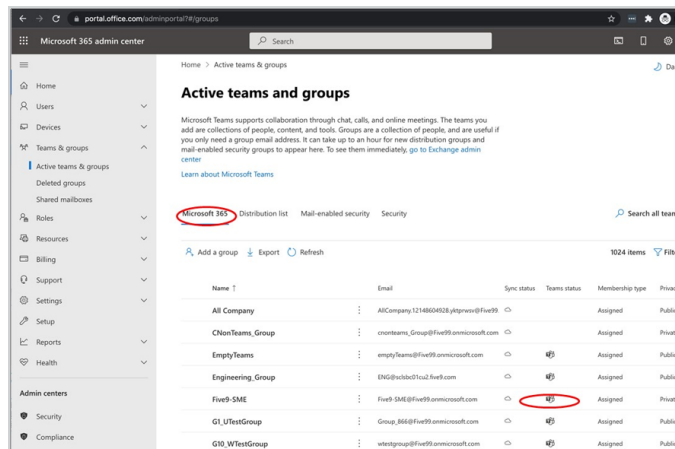
If you have entered one or more Teams group names in the Group Filter parameter, the group can be any type: Microsoft 365, not Microsoft 365, Teams-enabled or not Teams-enabled, Security Group, or Distribution group.

Group Filter Feature Not used

If you do not configure the Group Filter feature, there are a number of limitations that apply to the types of Teams group that will be imported. Any Teams group of type Microsoft 365 that has the Teams Status icon enabled as shown below will be imported.

Note

Group types Distribution and Security, or ones that do not have the Teams Status enabled, will be filtered out. The contacts that belong to such groups will also be filtered out and not count toward the 22,000 limit.



Organizing Contacts in the Five9 Address Book

By default, the Five9 address book groups Microsoft Teams contacts by group name. You can use the Contact Grouping Options setting in Admin Console to display contacts in other ways.

Contacts Grouping Options ⓘ

How would you like to organize your Teams contacts in the Address Book?

☒ By Group names

☐ By Department names

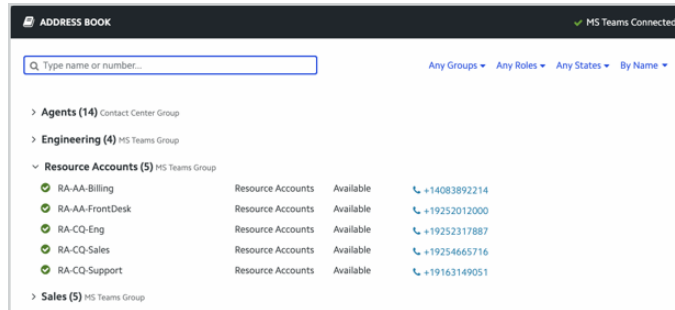
☐ Display all contacts under a single umbrella group

Note

The method you choose to organize contacts in the address book only affects the display of the contacts and isn't related to the group filtering option described above in *Contacts in Groups Specified in the Admin Console Group Filter*.

Using Teams Resource Accounts for Call Queues and Auto Attendants

The Five9 agent address book also supports Microsoft Teams call queues and auto attendants. Call queues and auto attendants are associated with resource accounts that require a special license and have assigned phone numbers. Five9 allows you to sync resource accounts with the Five9 address book.



Note

The status shown for resource accounts is always Available.

Requirements

Support for resource accounts requires the Microsoft Teams Phone Resource Account license. Each resource account must have a phone number in the **Business phone** field in Azure AD or Microsoft 365 Admin.

The screenshot shows the Microsoft Azure portal interface. At the top, there's a blue header with the 'Microsoft Azure' logo and a search bar. Below the header, the breadcrumb trail reads 'Home > Five9 | Users > Users > RA-AA-FrontDesk >'. The main heading is 'RA-AA-FrontDesk' with a three-dot menu icon. Underneath, it says 'Properties'. There are two buttons: 'Refresh' and 'Got feedback?'. Below these are tabs: 'All', 'Identity', 'Job Information', 'Contact Information' (which is selected and underlined), and 'Parent'. A message states: 'This view only contains properties that can be updated. [Learn more](#)'. Below this is a search bar labeled 'Search "Contact Informati...'. It says 'Showing 11 results under "Contact Information"'. There are several input fields: 'Street address', 'City', 'State or province', 'ZIP or postal code', 'Country or region', 'Business phone' (highlighted with a red box and containing '+19252012000'), and 'Mobile phone'.

Enabling Resource Accounts

Resource accounts are synced by default unless you are using group filters. For more information about group filters, see [Enabling and Configuring Microsoft Teams in Admin Console](#).

If you are using group filters to sync, select the **All Resource Accounts** category under **Group Filters**.

- 1 On the Admin Console home page, click **UC Integrations**.
- 2 Click **Edit**.
- 3 Under **Group filters**, if the **By Group Categories and/or specific group names** is selected, make sure the **All Resource Accounts** category is selected.

< UC Adapter: Microsoft Teams

Group filters ⓘ

☐ No group filters

☒ By Group Categories and/or specific group names

Which Microsoft group categories would you like to import?

☐ All O-365 Teams enabled groups

☐ All O-365 Non-Teams enabled groups

☐ All Security groups

☐ All Mail-enabled groups

☐ All Distribution groups

☒ All Resource Accounts

Search for a specific group name ⓘ

4 Click **Save** and confirm your changes.

Microsoft Teams Examples

Resource accounts for auto attendants:

Microsoft Teams admin center

Search

Dial plans
Emergency policies
Mobility policies
Shared calling policies
Voice routing policies
Voicemail policies
Auto attendants
Call queues
Holidays
Resource accounts

Resource accounts

Resource accounts are non-enabled user accounts that are used to represent system resources. In Teams, you can create resource accounts and then assign them to voice features such as call queues and auto attendants. [Learn more](#)

+ Add Edit Assign/unassign

✓	Display name	Username	Phone number	Licensed
	RA-CQ-Support	callq1@Five99.onmicos...	+1 916 314 9051	Licensed
	RA-CQ-Eng	callq4@Five99.onmicos...	+1 925 231 7887	Licensed
	RA-CQ-Sales	callq2@Five99.onmicos...	+1 925 466 5716	Licensed

Resource account for call queues:

Microsoft Teams admin center

Search

Dial plans
Emergency policies
Mobility policies
Shared calling policies
Voice routing policies
Voicemail policies
Auto attendants
Call queues
Holidays
Resource accounts

Resource accounts

Resource accounts are non-enabled user accounts that are used to represent system resources. In Teams, you can create resource accounts and then assign them to voice features such as call queues and auto attendants. [Learn more](#)

+ Add Edit Assign/unassign

✓	Display name	Username	Phone number	Licensed
⊙	RA-AA-Billing	ra-autoA1@sclabsc01c...	+1 408 389 2214	Licensed
	RA-AA-FrontDesk	ra-autoA3@Five99.onmi...	+1 925 201 2000	Licensed

Enabling the Adapter in Multiple Five9 Domains

Install the MS Teams adapter for each Five9 domain to enable a single Teams account (also known as *Teams Tenant*) in multiple Five9 domains.

Here are some important considerations:

- Enablement steps
 - For each Microsoft Azure authorization step, you can use the same global MS Teams admin credential to authorize all Five9 domains.

Note

You must use unique Five9 admin credentials for each Five9 domain.

For example, you can use your MS Teams account *Teams-admin1* and Five9 admin *F9-Domain1* credentials for your **Five9-Domain1** enablement. You can also use *Teams-admin1* for **Five9-Domain2**, but you must use your Five9 admin *F9-Domain2* credentials. You can use this method for all Five9 domains in your environment.

- Admin Console
 - Configure Admin Console parameters for each Five9 domain separately.
 - Each Five9 domain Admin Console configuration can use a different group filter setting.

For example, you can choose in *Five9 Domain1* to only display Teams contacts in the agent address book for Teams groups *Group1* and *Group2*, while in *Five9 Domain2* only display Teams contacts for Teams groups *Group2* and *Group4*.

- Capacity considerations
 - The maximum number of UC contacts you can import into the Five9 address book is 22,000 across all enabled Five9 domains.
- Use the **Group Filter** setting (above) to limit the number of contacts.

Configuring SIP Trunk for Microsoft Teams

Contact your Five9 representative to register your domain in Microsoft Teams to communicate with Five9 using a SIP trunk. This enables direct routing for interoffice dialing between Five9 and Microsoft Teams users.

Important

This must be done for SCL and ATL domains in US, LDN and AMS domains in EMEA, MTL03 and MTL10 domains in CAN.

Support for Extension Number Dialing

If your organization has contacts with telephone extensions, here's how you can configure the Microsoft Teams adapter to dial extensions. Configuration requires setup in Admin Console, Microsoft Teams Admin, and Active Directory.

For more information about the order in which phone numbers are imported, see [About Teams Contacts and Groups](#).

Prerequisites

- In Five9 Admin Console, under **Teams > Setup > Call Routing Options**, enable **Microsoft Teams Telephony Connect**.

Note

Contact your Five9 representative to enable Microsoft Teams Telephony Connect for the first time.

- Ensure that users have an extension assigned in Microsoft Teams Admin Center and in the Business Phone field in Microsoft Entra ID. To view the phone number fields in Microsoft Entra ID, go to **User > Properties > Contact Information**.

Microsoft Azure

Home > Users > John Smith >

John Smith ...

Properties

Refresh Got feedback?

All Identity Job Information **Contact Information** Parental controls Settings On-premises

This view only contains properties that can be updated. [Learn more](#)

Search "Contact Informati..."

Showing 11 results under "Contact Information"

Street address

City

State or province

ZIP or postal code

Country or region

Business phone **+35315266401;ext=6411**

Mobile phone +441156787839

Email test3@five59.onmicrosoft.com

Other emails + Add or edit other emails

Fax number +19253692936

Mail nickname test3

Save Cancel

An admin must enter the extension in both Microsoft Teams Admin Center and Microsoft Entra ID.

Microsoft Teams admin center

Search

Dashboard

Teams Premium

Teams

Users

Manage users

Guest access

External access

628 member access

Teams devices

Teams apps

Meetings

Manage users

You can manage Audio Conferencing settings, policies, phone numbers, and other features for people in your organization. Go to [Admin center > Users](#) to manage other user settings such as adding or deleting users, changing passwords, and assigning licenses.

Edit settings

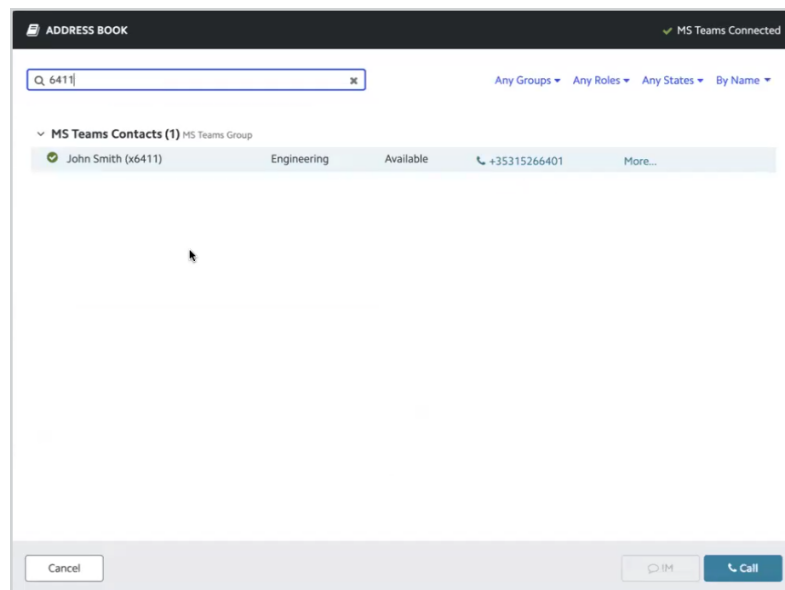
✓	Display name ↑	Username	Phone number
⊙	John Smith	test3@five59.onmicrosoft.com	+353 1 526 6401 ext. 6411
Vu		vur	+353 1 526 6401

- Phone numbers and extensions must use one of these formats:

- +<phone number>;ext=<extension>
- +<phone number>x<extension>

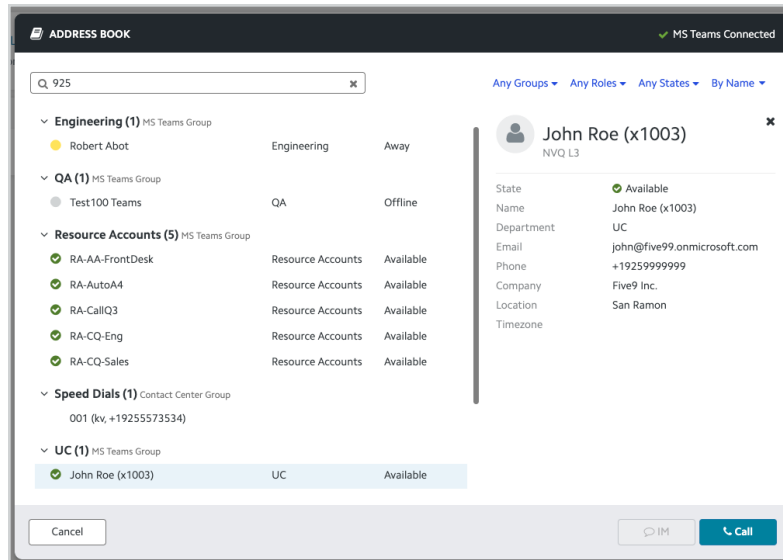
Searching for Contacts

You can search for a contact in the Agent Desktop Plus address book by typing the extension number in the search field.



Contact Card

The phone number extension appears next to the name on the contact card.



Office@Hand and RingCentral

This section describes how to prepare your implementation to use the Unified Communications Adapter for Office@Hand or RingCentral.

Note

A current limitation in the partner API prevents some presence changes in Office@Hand from updating the Five9 address book.

- Agents who use an Office@Hand and RingCentral client: When agents log out of Office@Hand and RingCentral, their presence is not displayed as *offline*, but remains the same as it was before they logged out.
- Agents who use a RingCentral-registered desk phone: The only presence status supported is **on a call**.
- Agents who set their RingCentral status to *invisible* are shown as *available* in the Five9 address book.

Requirements

[Creating a User as a Service Account](#)

[Installing the UC Adapter Application](#)

[Enabling and Configuring Office@Hand or RingCentral in Admin Console](#)

[Updating the Application for Existing Integrations](#)

Requirements

Request that your domain be enabled for this UC Adapter. For more information, contact your Five9 representative.

Obtain or configure an Admin Console administrator account with at least the **uc.uc.Access UC Panel** permission.

Obtain the AT&T Office@Hand or RingCentral administrator account that relates to your implementation.

Creating a User as a Service Account

You might occasionally see a failure in the contact sync or agent presence status updates for RingCentral and Office@Hand adapters due to issues with the access token. For example, the admin user's password changes, the admin has the maximum number of logged in sessions open, or the token is revoked or corrupted.

You can resolve these issues by creating a dedicated user as a service account for authorizing the UC adapter.

Note

Creating a user as a service account is optional. You can still use a regular admin user for granting consent for the Five9 UC adapter app without affecting integration capabilities and features. However, when there is a change to the regular admin user, you need to register the Five9 UC adapter again to fix the token error. You should see the token error in the adapter's status in Administrator Console when it occurs.

To create and manage the account:

- 1 In the RingCentral or Office@Hand admin portal, create a new user with the following details:

Setting	Set to
Name	svc-account-admin, for example
Role	Super admin
Include User in Company Directory	Unselected (prevents the user from appearing in the Five9 address book)
Email	A unique email for the user as required by RingCentral or Office@Hand.

User Details

General Settings & Permissions Security

First Name
svc-account-admin

Last Name
Test

Job Title

Extension Number
109

Mobile Phone

Record User Name ⓘ
Five9UC Admin
Edit

Department

Contact Phone ⓘ

☐ Publish in Company Directory ⓘ

Email
svccountadmin@five9.com
Verify Email Uniqueness

☐ Publish in Company Directory ⓘ

Status
Enabled

☐ Include User in Company Directory ⓘ

☐ Yes, I would like to receive information on product education, training materials, etc

☒ Send an email when a phone is added

Copy and Assign Cancel Save

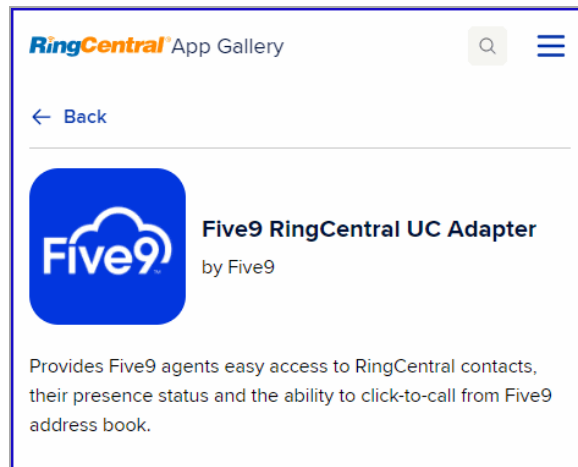
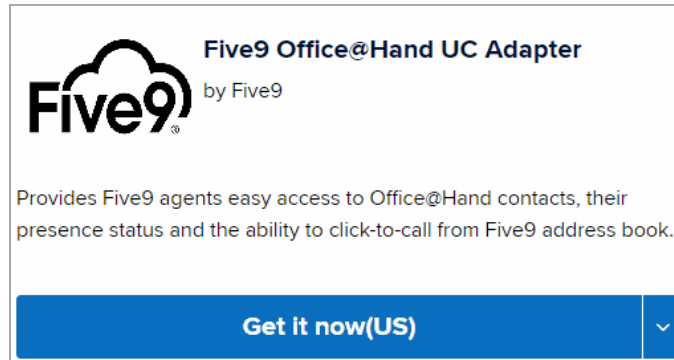
2 Click **Save**.

Once the service account is activated by clicking a link in the activation email, use it to log in to the RingCentral or Office@Hand App Gallery and add the UC adapter as described in [Installing the UC Adapter Application](#).

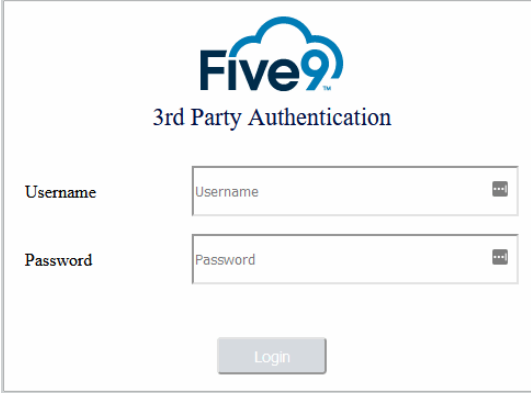
Installing the UC Adapter Application

You need to install a Five9 app located in the RingCentral or Office@Hand App Gallery. This app automatically sends to Five9 all data required to enable the adapter.

- 1 Log into the [Office@Hand](#) or [RingCentral](#) app gallery that matches your implementation.
- 2 Locate and select the appropriate **Five9 App**.

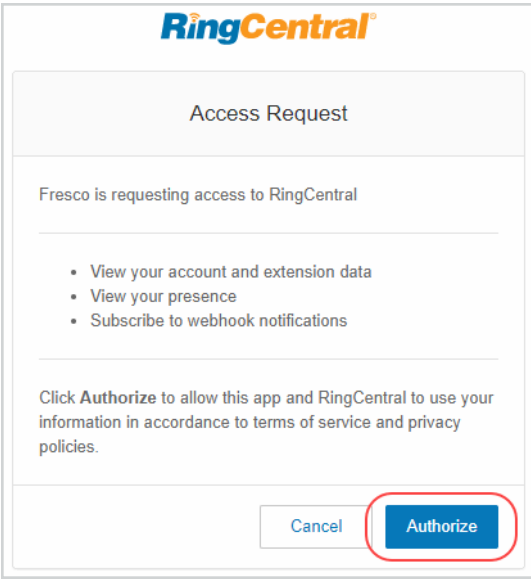


- 3 In the Five9 App, enable **Pre-approve** if it is disabled, and click **Visit site to install**.
- 4 In the Five9 landing page, log into your administrator account.



The image shows a login form for Five9 3rd Party Authentication. At the top is the Five9 logo and the text "3rd Party Authentication". Below this are two input fields: "Username" and "Password". Each field has a placeholder text of the same name and a small icon on the right. Below the fields is a "Login" button.

5 Click **Authorize**.



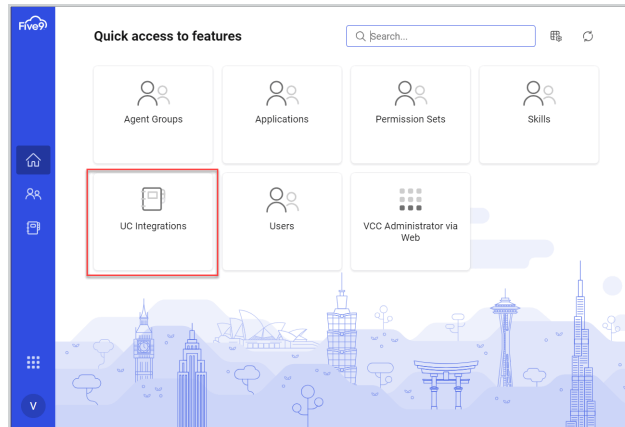
The image shows a "RingCentral" "Access Request" dialog. The title is "Access Request". Below the title, it says "Fresco is requesting access to RingCentral". There is a list of permissions: "View your account and extension data", "View your presence", and "Subscribe to webhook notifications". Below the list, it says "Click **Authorize** to allow this app and RingCentral to use your information in accordance to terms of service and privacy policies." At the bottom, there are two buttons: "Cancel" and "Authorize". The "Authorize" button is highlighted with a red circle.

6 Once the Authorization Successful message is displayed, close the authorization notification.

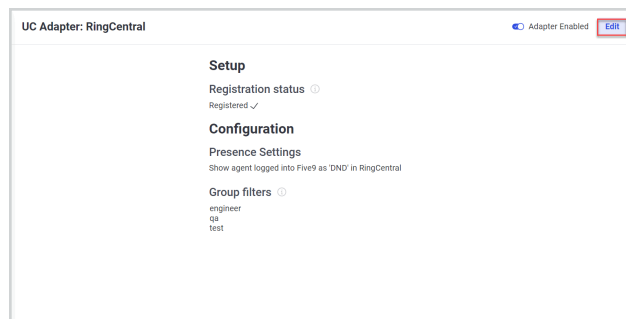
Enabling and Configuring Office@Hand or RingCentral in Admin Console

Once you connect Five9 to your Office@Hand or RingCentral account, configure and enable the adapter in the Five9 Administrator Console application.

- 1 Log in to Five9 Admin Console at <https://admin.us.five9.net> or your regionalized login URL.
- 2 Select the **UC Integrations** card to display the **UC Adapter** page.

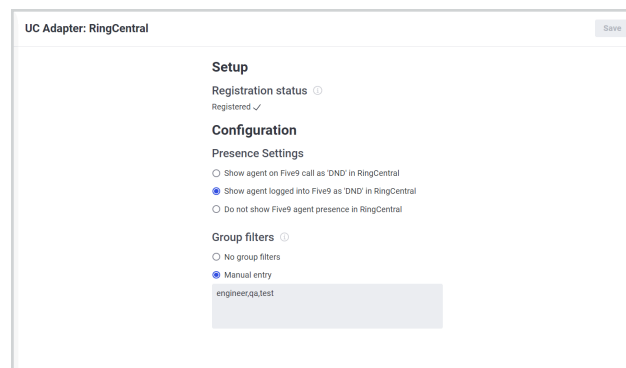


The **Unified Communications: RingCentral** or the **Unified Communications: Office@Hand** page appears.

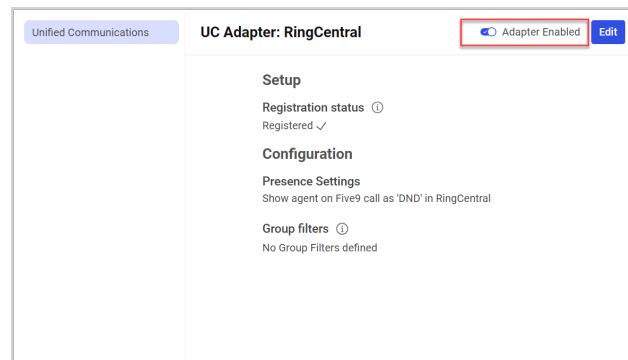


- 3 Click **Edit**.

The **Setup** page displays.



- 4 Use the toggle in the upper-right corner to enable the adapter for agents, and then click **Enable** when asked to confirm.



Note

You can enable or disable the adapter in Admin Console at any time after the initial configuration. To access the setting, select the Unified Communications card on the Admin Console home page. Use the toggle in the upper-right corner to enable or disable the adapter.

Refer to the following sections to configure the RingCentral or Office@Hand group filters and agent presence options, and enable or disable the adapter.

Note

You must complete the App Gallery authorization steps described in Installing the UC Adapter Application before you can configure any settings. If you have not successfully completed that procedure, you will see a **Registration Failed** error in Admin Console.

Configuring the Group Filter

The group filter feature lets you import a comma-separated list of Office@Hand or RingCentral departments (such as Engineering, Finance, Product Management) into the Five9 address book.

It is important to note that:

- Names must exactly match the department names as they appear in the Office@Hand or RingCentral directory.

- Entries are not case-sensitive.
 - If this field is left blank, all departments are imported.
 - Making changes to the Group Filter list in large directories may take a few minutes to take effect.
- 1 Open the **UC Adapter: RingCentral** or **UC Adapter: Office@Hand Setup** page as described above.
 - 2 Under **Group filters**, select either **No group filters** or **Manual entry**.
 - 3 If you selected manual entry, enter a list of Office@Hand or RingCentral department names.
 - 4 Click **Save** and confirm your changes.

Configuring Agent Presence

The agent presence feature enables you to set an agent's status in Office@Hand or RingCentral to DoNotDisturb, either when the agent is on a customer call or when the agent has logged in to Five9. You can configure how agent presence works for your organization.

- 1 Open the **UC Adapter: RingCentral** or **UC Adapter: Office@Hand Setup** page as described above.
- 2 Under **Presence Settings**, select one of these agent presence options:
 - **Show agent on Five9 call as 'DND' in RingCentral**
When the agent is on a customer call in Five9, their RingCentral or Office@Hand status is DND. If you select this option, it becomes active the next time agents handle a Five9 call.
 - **Show agent logged into Five9 as 'DND' in RingCentral**
When the agent's status is DND in Five9, their RingCentral status is Do Not Disturb. If you select this option, the agent status on RingCentral/Office@Hand shows as Do Not Disturb the next time the agent handles a call or logs in to Five9.
 - **Do not show Five9 agent presence in RingCentral** (default)
The agent's presence status does not display in RingCentral or

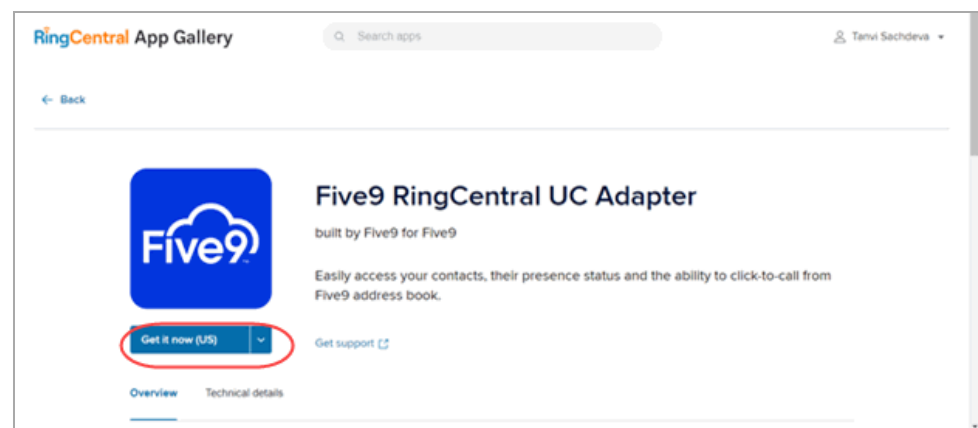
Office@Hand.

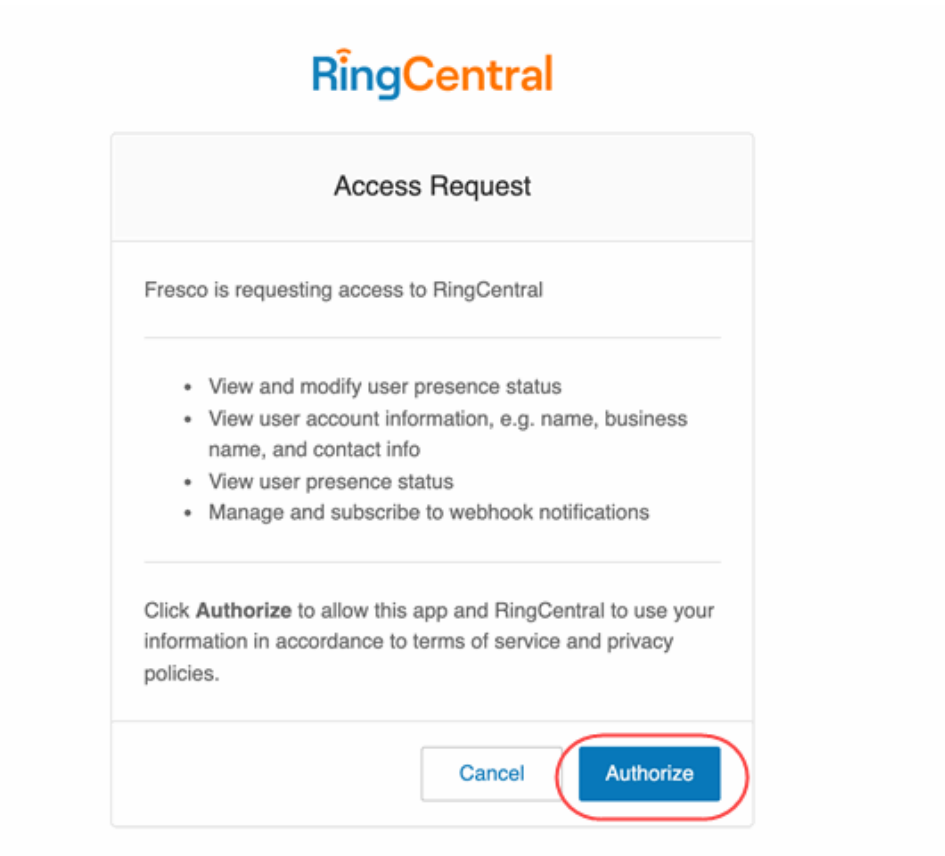
- 3 Click **Save** and confirm your changes.

Updating the Application for Existing Integrations

To activate the Agent Presence feature, existing Five9 integrations must update the API permissions for the adapter from the RingCentral or Office@Hand App Gallery. New customers enabling the adapter for the first time will get the needed API permissions and do not need to go through this process. For existing customers, follow these steps to update the API permissions for the RingCentral/Office@Hand adapter application:

- 1 Go to RingCentral or Office@Hand App Gallery and search for the Five9 app.
- 2 Click **Get it now (US)**.



3 Click Authorize.

Nextiva

This section describes how to prepare your implementation to use the Five9 UC Adapter for Nextiva.

[Requirements](#)

[Authorizing the Adapter in the Nextiva Admin Portal](#)

[Enabling the Nextiva Adapter in Admin Console](#)

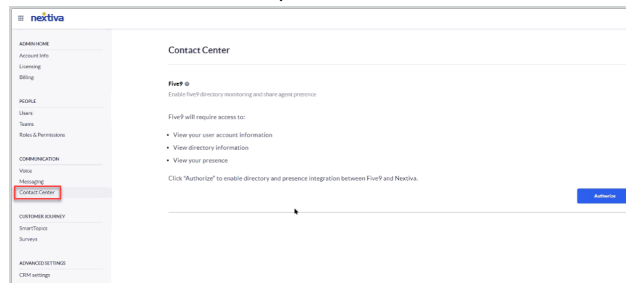
Requirements

- Request that your domain be enabled for this UC Adapter. For more information, contact your Five9 representative.
- Before starting, obtain the Nextiva administrator credentials that apply to your implementation.
- Obtain or configure a Five9 Administrator Console administrator user with at least the **uc.uc.Access UC Panel** permission.

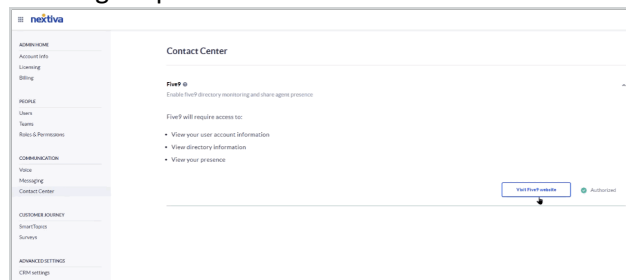
Authorizing the Adapter in the Nextiva Admin Portal

Before you can enable the adapter on the Five9 side, you must authorize the adapter on the Nextiva side.

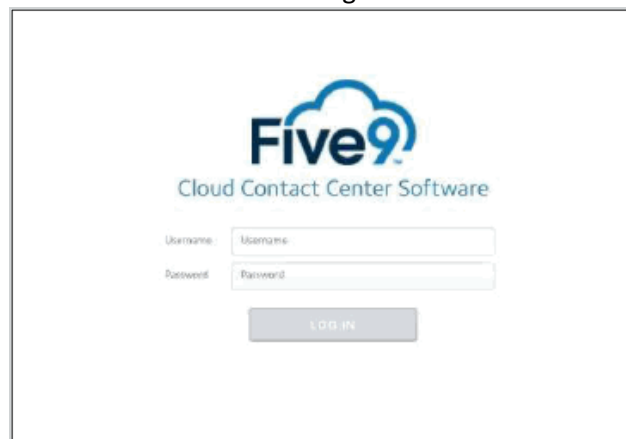
- 1 In the Nextiva administrator portal, go to Administration.
- 2 Under Communication, click **Contact Center**.



- 3 Click **Authorize**. This authorizes the adapter to monitor the Nextiva directory and share agent presence.



- 4 Click **Visit Five9 Website** to go to the Five9 Global Authorization page.



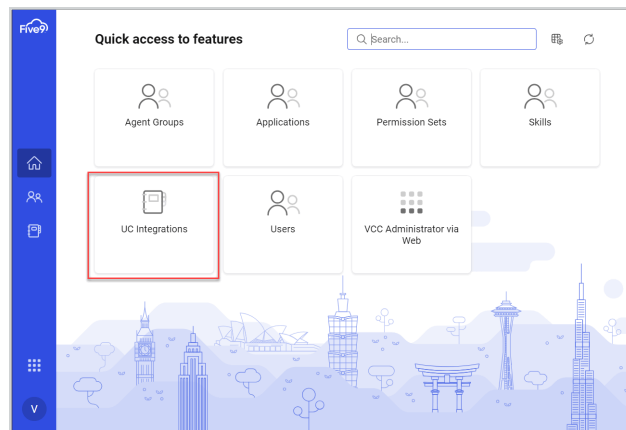
- 5 Log in using Five9 VCC admin credentials. You should see an "Authentication Successful" message after you log in.

Once you connect Five9 to your Nextiva account, enable the adapter in the Five9 Administrator Console application. See [Enabling the Nextiva Adapter in Admin Console](#).

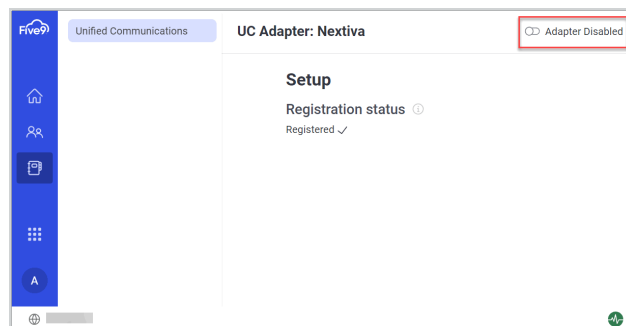
Enabling the Nextiva Adapter in Admin Console

In [Authorizing the Adapter in the Nextiva Admin Portal](#), you authorized the adapter on the Nextiva admin side. Now, in Five9 Admin Console, you need to enable the adapter so agents can view Nextiva users and their presence.

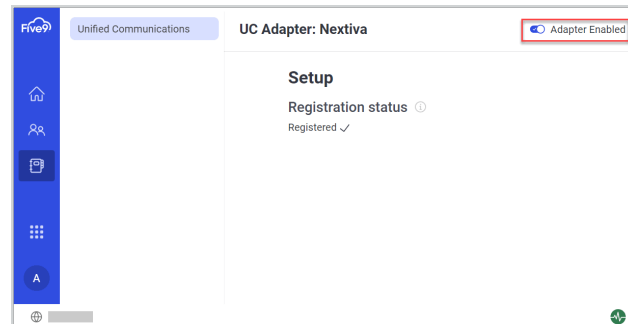
- 1 Log in to Five9 Admin Console at <https://admin.us.five9.net> or your regionalized login URL.
- 2 Select the **UC Integrations** card on the Admin Console home page.



The **UC Adapter: Nextiva** Setup page displays.



- 3 Use the toggle in the upper-right corner to enable the adapter for agents, and then click **Enable** when asked to confirm.

**Note**

You can enable or disable the adapter in Admin Console at any time after the initial configuration. To access the setting, select the Unified Communications card on the Admin Console home page. Use the toggle in the upper-right corner to enable or disable the adapter.

After completing these steps, contact Five9 Professional Services or the implementation team to create routing rules for Nextiva extension calls.