

# 5.2 How to Transfer a Call

## Bright Pattern Documentation

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## Table of Contents

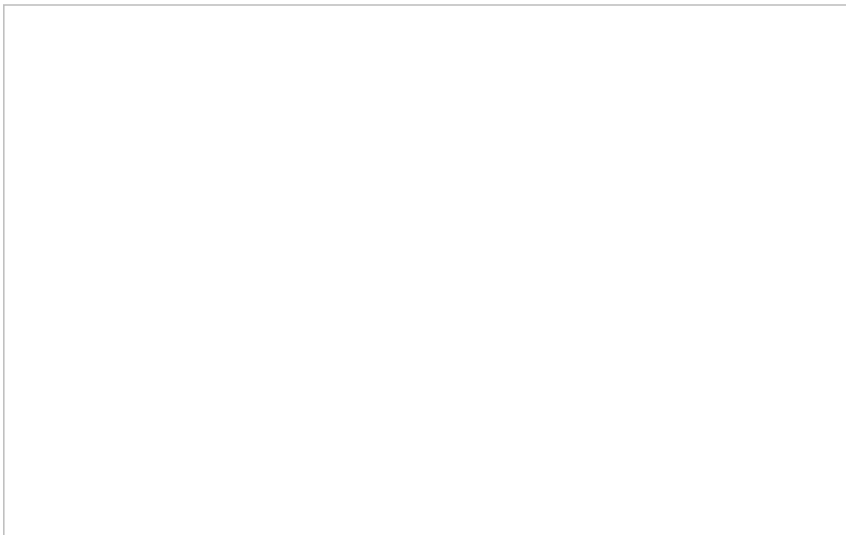
Table of Contents	2
How to Make a Consultation Call	3
How to Interpret Your Current State Information	3
Agent States	4
Ready	4
Ringing	4
Busy	4
After Call Work	5
Not Ready	5
Lunch	6
Away From Desk	6
Break	6

# How to Make a Consultation Call

A consultation call is a call you make with respect to another active call on your desktop.

Follow these steps to make a consultation call:

1. Place your primary call on hold first. See [How to Hold and Retrieve a Call](#) for more information.
2. Make a call to the consultation party. See [How to Make an Internal Call](#) or [How to Make an Outbound Call](#) for more information.
3. The *Active Communications List* will display both calls, the primary call with the hold icon , and the consultation call with the outgoing call icon .
4. If the consultation party is an agent or a supervisor, you can send the content of the *Context Information Area* related to the primary call by clicking the **Send Screen**  button.
5. After finishing the consultation, click the **End Call** button  to release the consultation call. (You can instead transfer your primary call to, or conference it with, the consultation party. See [How to Transfer a Call](#) and [How to Host a Conference](#) for more information.)
6. Retrieve the active call. See [How to Hold and Retrieve a Call](#) for more information.



Primary and consultation call in the Active Communications List

**Note:** You can also alternate between the primary and consultation calls by retrieving them in turn. (Clicking the **Retrieve** button will automatically put the current active call on hold).

## How to Interpret Your Current State Information

The agent state is the indication of your current availability to handle service calls. This information is used by the system to decide whether a new service call can be delivered to you. The information about the time you spend in each state also appears in reports about your performance.

The Agent Desktop application uses icons to represent agent states. Your current state is shown in the upper left-hand corner of Agent Desktop. These icons, the states they represent, and descriptions of those states are described as follows.

**Note:** Information in the main text of this section is valid if your system is configured to let you handle one customer interaction at a time. This configuration is most typical when you handle calls only. If you process interactions of other types (e.g., chats or emails), then, depending on your contact center practices, you may be expected to handle multiple interactions simultaneously. The differences in interpretation of your states in this case are briefly explained in the notes following a state description. For a more detailed explanation, see sections [Handling Multiple Chat Sessions](#) and [General Information About Handling Email](#).

## Agent States

### Ready



You are available to take a service call. In most cases, you make yourself *Ready* manually. See [How to Make Yourself Ready](#) for more information.

Depending on your contact center practices, the *Ready* state may also be applied automatically under some of the following conditions:

- Upon login
- As soon as you finish a previous service call
- When the time allocated for after-call work associated with the previous call expires
- When the rest time associated with the previous call expires

You may also be forced into the *Ready* state by your supervisor.

**Note:** If you are expected to handle multiple interactions simultaneously, the *Ready* state will only be applied when you do not have any active interactions on your desktop. However, in this case you may receive new interactions in states other than *Ready*.

### Ringing



You are unavailable to take service calls because one service call is already being delivered to you. The ringing icon is briefly displayed while your phone is ringing.

### Busy



You are unavailable to take new service calls because you are already handling a service call. This state is displayed from the moment the call is connected and until it is released. For outbound calls, it also includes the call dialing phase. When your service call is released, depending on your contact center practices and the services that you provide, you will be switched automatically to either the *After Call Work* state, the *Not Ready* state, or the *Ready* state.

**Note:** Even if you are expected to handle multiple interactions simultaneously, your state will be displayed as *Busy* as long as you have at least one active interaction of any media type. However, your actual availability will depend on the number of interactions you are currently handling versus the maximum number of interactions you are expected to be able to handle simultaneously. Therefore, you may receive new interactions when you are in the *Busy* state.

## After Call Work



You are unavailable to take new service calls because you are processing information related to the call that you previously handled. This state may or may not be used depending on your contact center practices and the services that you provide. If it is used, you will be switched to this state automatically as soon as the call is released by either the customer or yourself. You will remain in this state until you manually make yourself *Ready* or *Not Ready* to take another call. Note that your *After Call Work* state may also end automatically if the time allocated for the after-call work exceeds the limit set by your administrator.

**Note:** If you are expected to handle multiple interactions simultaneously, you may receive new interactions when you are in the *After Call Work* state. You will be switched to this state only when the last live interaction on your desktop is finished. (Otherwise, you will continue to be in the *Busy* state.)

## Not Ready



You are unavailable to take service calls because you are temporarily away from your desktop or busy doing some work that is not directly related to handling of service calls. Under normal circumstances, you make yourself *Not Ready* manually. Your system may also be configured to let you indicate a specific reason for being *Not Ready*. For more information, see [How to Make Yourself Not Ready](#) and the following *Not Ready* agent states: *Lunch*, *Away From Desk*, and *Break*. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

Depending on your contact center practices, the *Not Ready* state may also be applied automatically under some of the following conditions:

- Upon login
- As a short rest time after finishing processing of a service call
- Upon rejection of a service call
- If you do not answer a ringing service call within a reasonable time
- When your Agent Desktop loses connection to the system

You may also be forced into the *Not Ready* state by your supervisor.

**Note:** You will not receive any interactions while you are in this state regardless of how many interactions you are expected to handle simultaneously.

## Lunch



You are unavailable to take service calls because you are on your lunch break. Under normal circumstances, you manually set the agent state to *Lunch* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

## Away From Desk



You are unavailable to take service calls because you are temporarily away from your desktop. Under normal circumstances, you manually set the agent state to *Away From Desk* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.

## Break



You are unavailable to take service calls because you are taking a break. Under normal circumstances, you manually set the agent state to *Break* or some other Not Ready reason. See [How to Make Yourself Not Ready](#) for more information. These reasons are specific to your contact center. You will get detailed instructions about the meaning and usage of such reasons from your administrator.