5.3 How to Transfer a Call with an Active Remote Assistance Session

Bright Pattern Documentation

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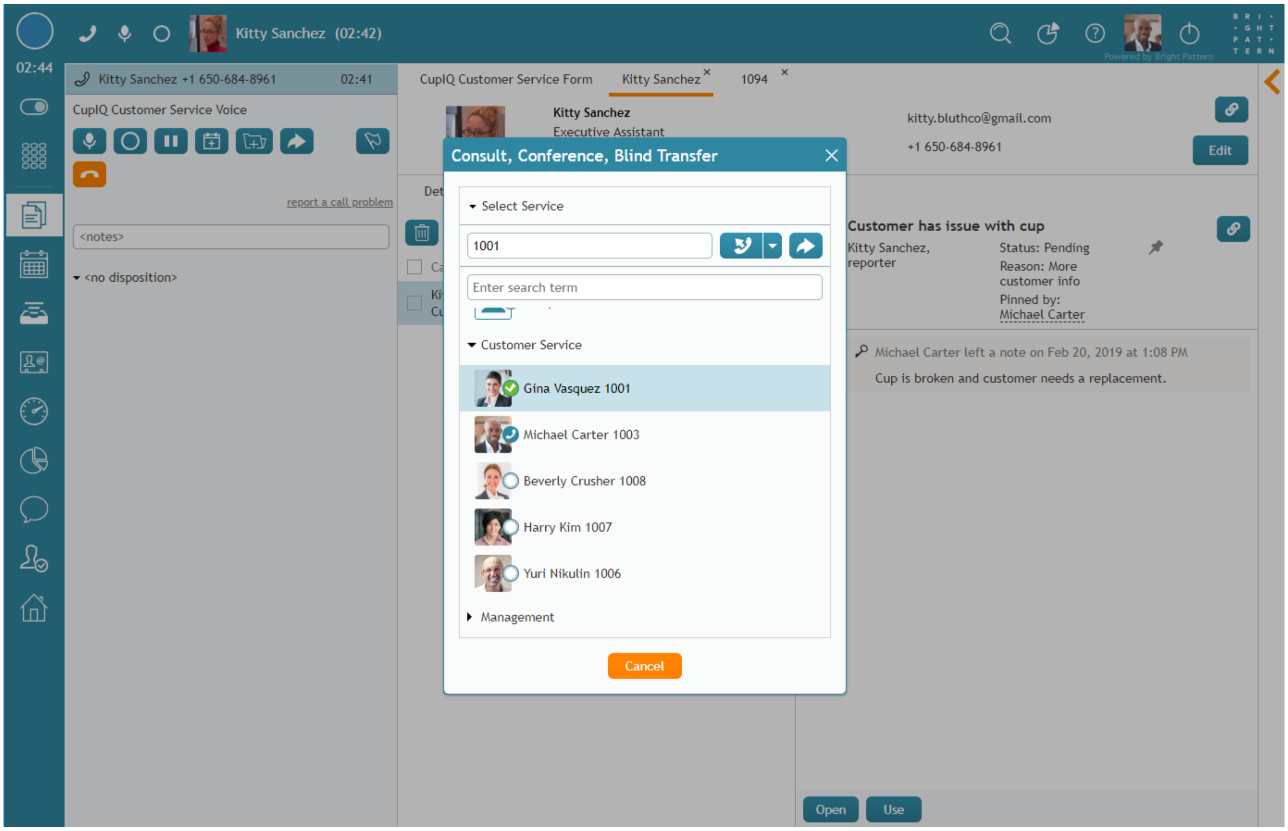
How to Make Consultations and Transfers

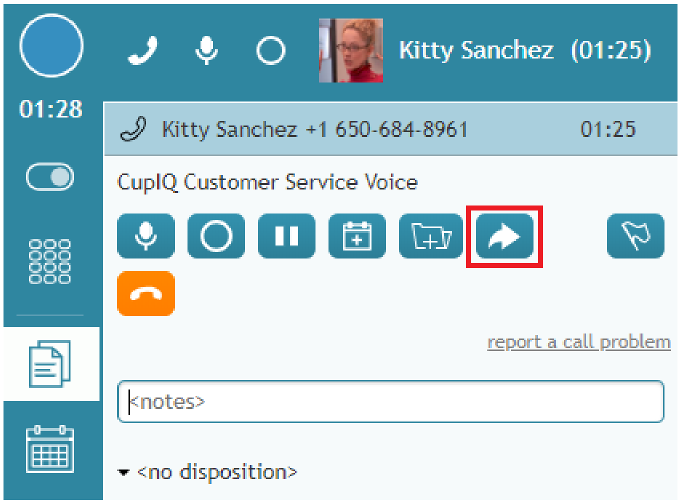
If your contact center accepts calls, occasionally you will need to transfer calls, conduct conference calls, or consult other agents or managers while on an active call. This article shows you how to use the *Consult, Conference, Blind Transfer* feature while on an active call.



How the Consult, Conference, and Blind Transfer window looks in Agent Desktop

Consult, Conference, Blind Transfer Window

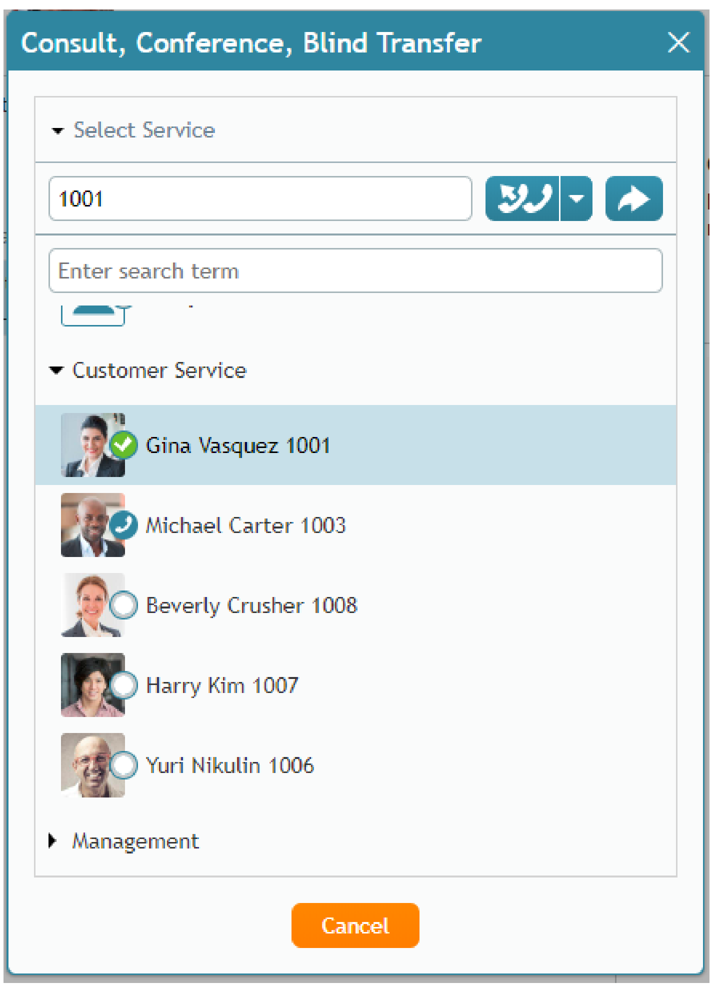
Consult, Conference, Blind Transfer is the window that pops open after clicking on the **Initiate transfer or conference**  button during an active call.



The "Initiate transfer or conference” button in the list of phone controls

From this window, you may do the following:

- Scroll down and select a recipient from the list of available agents.
- Use the search bar to enter the name or number of the agent you want to transfer the call to.
- In the number field, enter the phone number or extension of the party you are transferring the call to.



The Consult, Conference, and Blind Transfer window

Consultation Calls

A *consultation call* is a call you make to another agent or manager with respect to an active customer call on your desktop. Making consultations allows you to ask others questions while keeping your caller on hold.

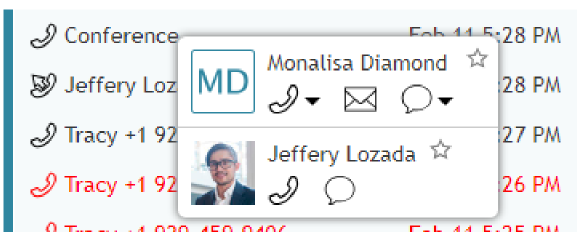
To make a consultation call, click on the **Initiate transfer or conference** button; this pops the Consult, Conference, Blind Transfer window. After the extension or phone number is entered in the number field, click on the dropdown menu and select the **dial** button; you will dial the phone number or extension in the number field but the call will not be transferred.

Conference Calls

A *conference call* is a call where more than one party is actively on a call; conference calls can be useful if your caller wants to speak with a manager.

To make a conference call, click the **Initiate transfer or conference** button; this pops the Consult, Conference, Blind Transfer window. After the extension or phone number is entered in the number field, click on the dropdown menu and select the **dial as conference** button. From here, all parties will be active on the call.

Recent conference calls can be seen in the *Recent* list, displayed as the word "Conference"; when you hover your cursor over the word, the contact cards of all parties on the call are displayed.



A recent conference call

Blind Transfers

A *blind transfer* is when an agent passes a call to another phone number or extension without knowing if the call will be actively received. Blind transfers are useful when callers need to speak with specific agents or departments.

To initiate a blind transfer, click on the **Initiate transfer or conference** button; this pops the Consult, Conference, Blind Transfer window. After the extension or phone number is entered in the number field, click the **blind transfer** button; the phone call will transfer and the interaction will be completed.

For blind transfers, the name and phone number of the caller will be displayed and stored in the **Recent** list.

Keyboard Shortcuts

Note that conference calls, consultations, and blind transfers can be made using keyboard shortcuts, also known as hot keys or hotkeys.

The keyboard shortcuts are as follows:

- First, to initiate a transfer or conference, select **Alt-Shift-T**
- To make a blind transfer, select **Alt-Shift-B**
- To make a consultation call, select **Alt-Shift-D**
- To make a conference call, select **Alt-Shift-C**

How to Consult a Fellow Agent's State Before Transferring an Interaction to Them

If real-time state icons are enabled for your contact center, they are viewable in your directory as well as in the following:

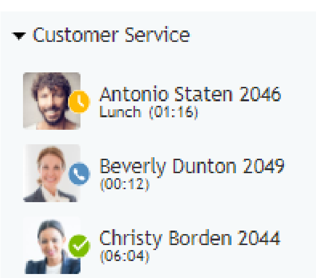
- The Consult, Conference, and Blind Transfer dialog windows
- The Chat Invite dialog window
- The Transfer Email and Assign Email dialog windows

If you are processing an interaction and need to transfer it to another agent, you can use the icons to determine who is available to transfer the interaction to.

Note: If real-time state icons are not enabled for your contact center, the same process may be used with presence icons.

General Rule

Ideally, the best agents to transfer interactions to are in the Ready state. This state means an agent is ready and waiting to process interactions (i.e., they are not actively working on anything else).

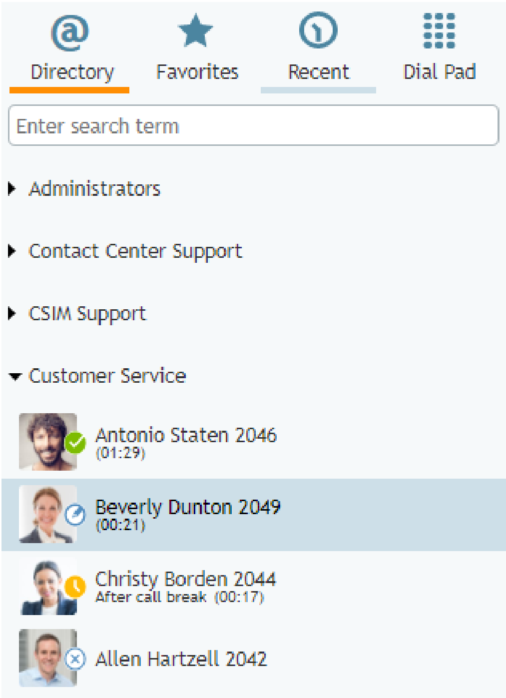


Agents in various states

Check the Directory

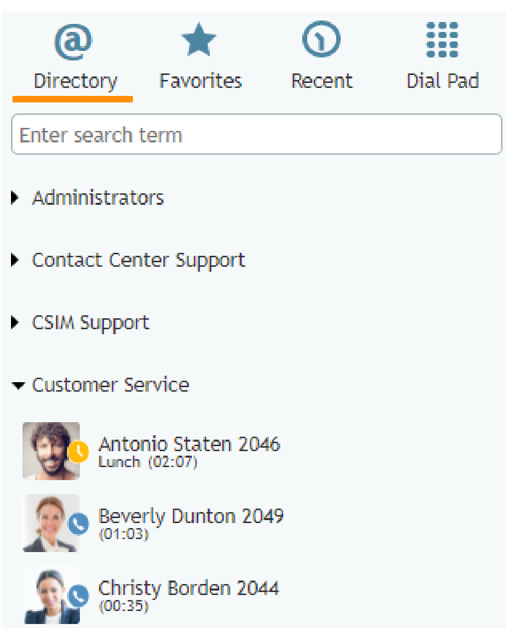
The directory is one of the places to view agent real-time states. You can access the directory by clicking the conversations icon or the directory and dial pad icon. To view agents, click on the various team names (e.g., Customer Service).

In the following image, three out of four of the displayed agents are busy or logged out. If you needed to transfer an interaction to one of these agents, Antonio Staten would be the best choice because he is Ready.



Agent Antonio Staten is in the Ready state

In the following image, all three agents are busy (i.e., two are on active calls and one is at lunch). If you needed to transfer an interaction to one of these agents, you could inform the customer they will need to wait for the next available agent, send an internal message to the desired agent, and then transfer the customer when the agent is ready.

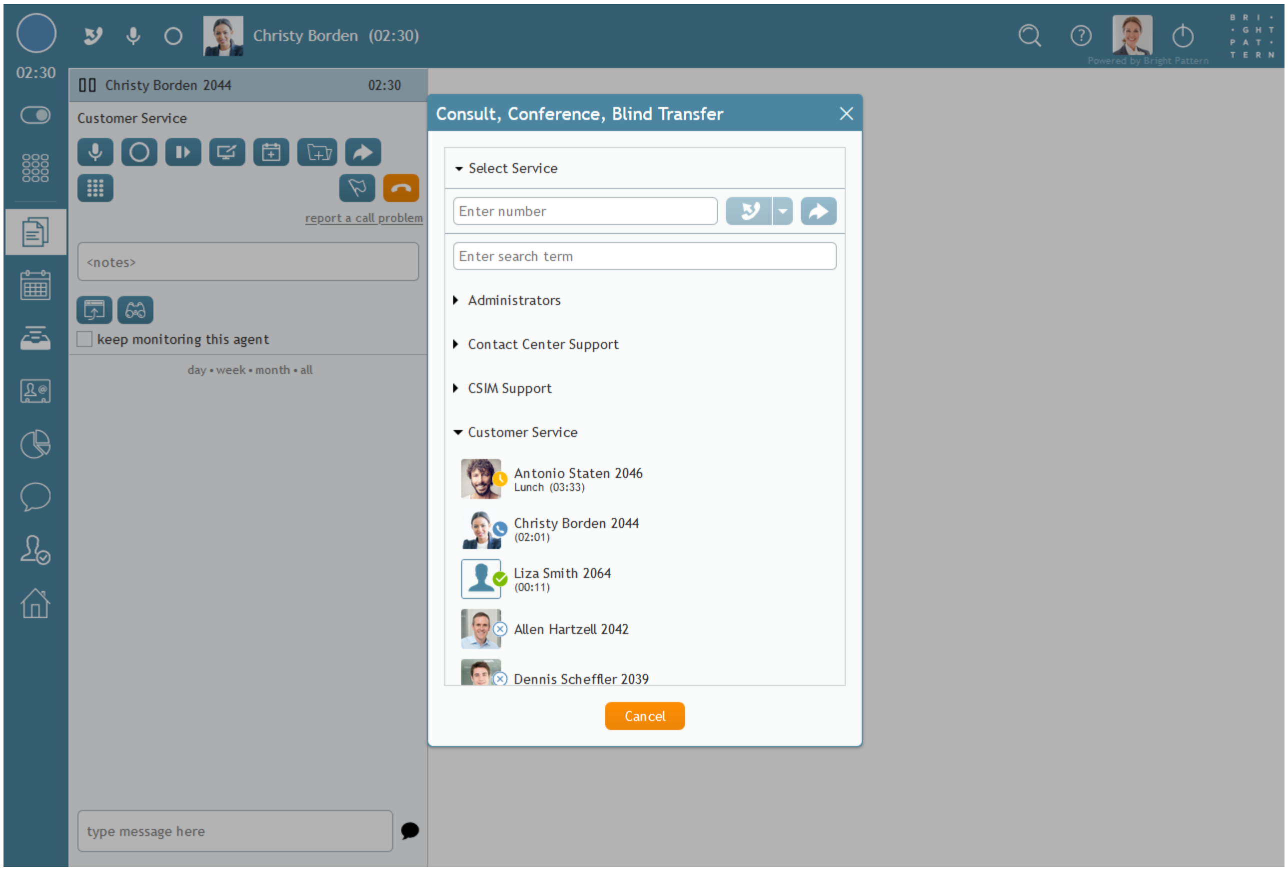


Checking agent states lets you know when your coworkers are unavailable

Check the Transfer Dialog Window

If you are actively processing an interaction, the various transfer dialog windows display real-time states too. In the following image, agent Christy Borden called her coworker Beverly Dunton to ask her a question. Unfortunately, Beverly does not know the answer and she wants to see who is available to transfer Christy to.

When Beverly clicks the **Initiate transfer or conference** button the Consult, Conference, Blind Transfer dialog window pops, allowing her to see that agent Liza Smith from the Customer Service team is available.



Real-time states can be seen from transfer dialog windows

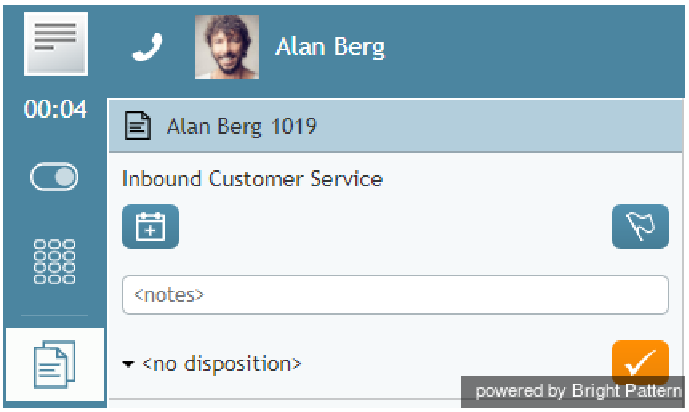
How to Wrap Up After Call Work

Depending on the type of service you provide and your contact center practices, after a service interaction (call or chat) has terminated, the system may automatically change your state to *After Call Work* (ACW). You can use the time in this state to finish any work associated with the service interaction that has just ended.

After finishing the after call work for the current customer interaction, you have the following options:

- Click the **Complete** button. This will finish processing the current interaction. If this was the only interaction at your desktop, you will be automatically switched to the next state, which may be *Ready* or *Not Ready*, depending on the system settings and/or the state you may have previously requested. However, if you have other active interactions at your desktop, you may remain in the *After Call Work* state and continue working on the other interactions. Thus, when you handle multiple interactions simultaneously, it is recommended that you use the **Complete** button to finish interaction processing in the *After Call Work* state.

- If you are ready to receive another service interaction, you can click the **User Status Indicator/Selector** and select Ready from the drop-down menu. You will be switched to the *Ready* state regardless of how many interactions you may have had at your desktop. Processing of all such interactions will be finished.
- If you wish to make yourself temporarily unavailable to receive new service interactions, click the **User Status Indicator/Selector** and select Not Ready (or a specific reason) from the drop-down menu. You will be switched to the *Not Ready* state regardless of how many interactions you may have had at your desktop. Processing of all such interactions will be finished.



Complete button

You may be required to enter a disposition before finishing interaction processing. For more information, see How to Enter Dispositions and Notes.

Depending on the system settings, if you do not make yourself either *Ready* or *Not Ready* manually within the time allocated for after call work, the system may eventually switch you to the *Ready* or *Not Ready* state automatically.

Also, depending on your system settings, if there are other calls waiting in queue while you are in the *After Call Work* state, you may receive visual and audio notification of this fact.

Note: If you use a custom form in the *Context Information Area* for processing of data related to a specific call, the **Complete** button may appear on that form.