

Transferring Interactions

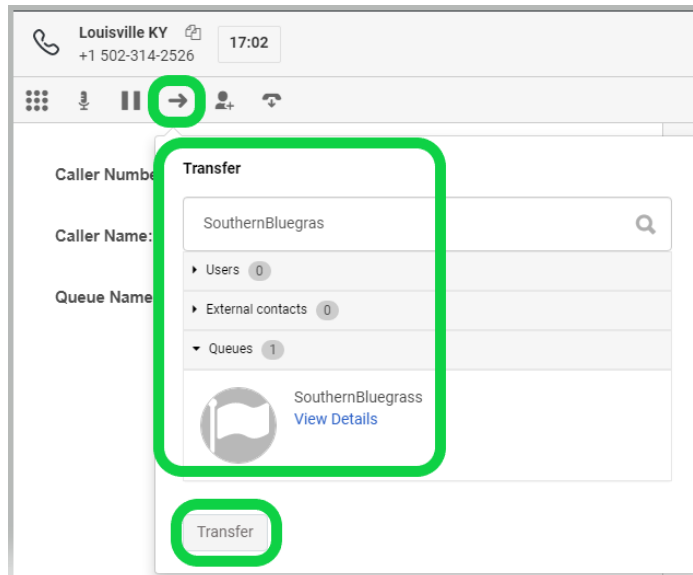
Version	Date	Intended Distribution To
1.0	07/28/2023	Genesys Cloud Users

This Job Aid includes a description of two types of transfers that users may complete, and the steps to complete each one.

Step	Action
	<p data-bbox="362 363 998 394">Two types of transfers are detailed in this Job Aid.</p> <ul data-bbox="410 426 1416 961" style="list-style-type: none"><li data-bbox="410 426 1416 688">• Blind/Cold – a blind/cold transfer is one in which a caller is sent to a queue, extension, or voicemail without an introduction. For example, a blind/cold transfer to a queue would be adding the caller to another line in which they're essentially beginning their call over again, explaining their need to a new person without any explanation from the person who originally answered their call. This is not the preferred method for transferring callers.<li data-bbox="410 699 1416 961">• Consult/Warm – a consult/warm transfer is one in which the caller is introduced to the person receiving the transfer before the call is transferred. The person who is making the transfer will speak to the person receiving the transferred call, to introduce the original caller, or to explain the original caller's circumstances before completing the transfer. In almost all cases, consult/warm transfers are the preferred type of transfer. <p data-bbox="362 993 1356 1066">The first part of these instruction details the method for a Cold/Blind transfer, and the second section details the method to for a Warm/Consult transfer.</p>

Blind/Cold Transfer

In order to blind/cold transfer a call, the user must be on an active call. Select the transfer icon (arrow, as pictured) to activate the transfer utility.



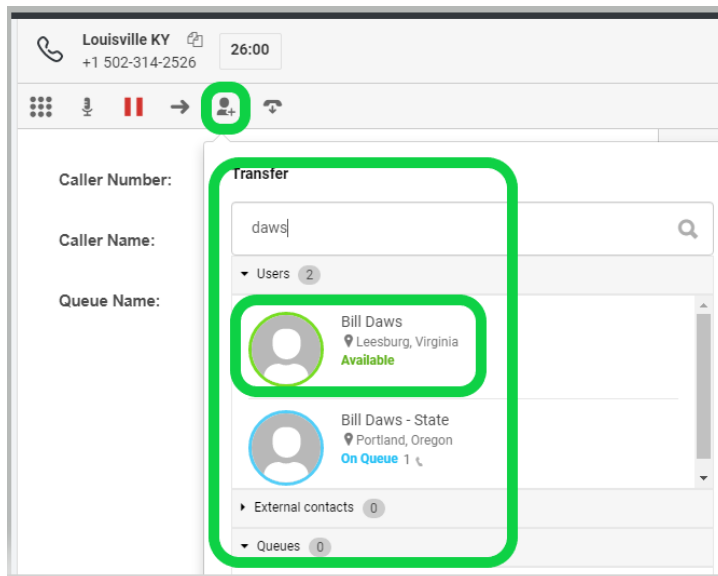
In the transfer pop-up utility, begin typing the entity to whom the transfer is being made. Next, select the Transfer button at the bottom of the pop-up. This will immediately send the caller to the next person or department who will assist them.

In this case, the caller will essentially be starting their call again. The worker transferring the call did not speak to the one receiving it, so the no introduction of the caller or explanation of their circumstance has happened when the call is transferred. Remember that this is not the preferred method for most transfers.

Consult/Warm Transfer

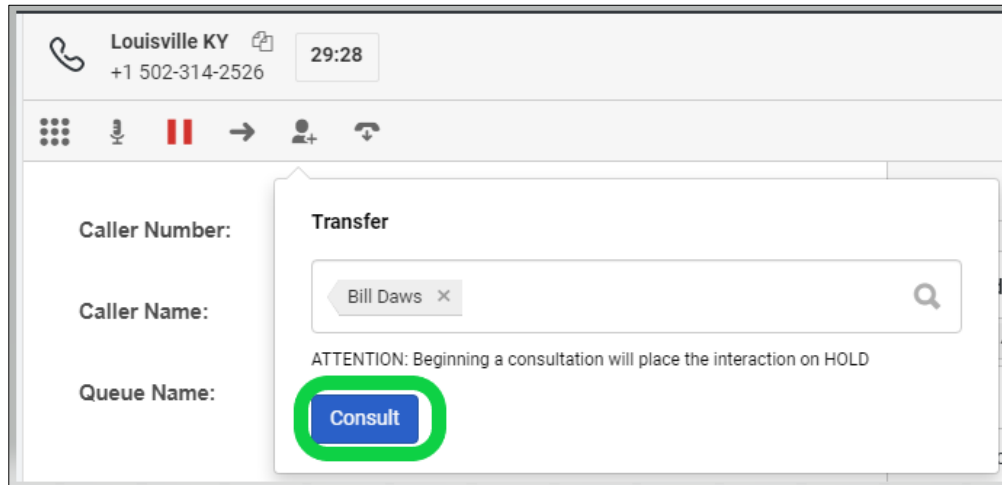
Remember that this is the preferred method for transferring the majority of callers.

To make the consult/warm transfer, select the Consult icon (person with a plus sign as pictured).



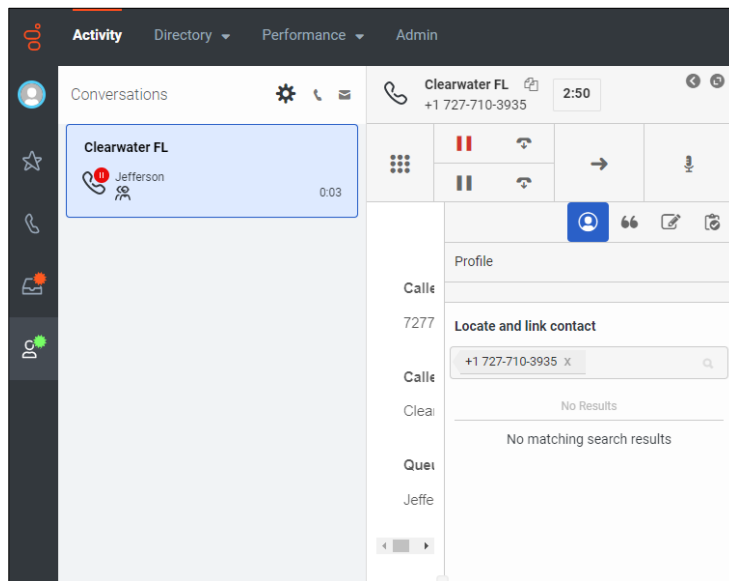
In the Search box of the transfer utility, begin typing the entity to whom the transfer is being made. This can be a person, a queue, or another (external) phone number.

Once entered, select the Consult button.



This allows the worker making the transfer to speak to the worker receiving the transfer before sending the original caller to the receiving worker, who will then already be aware of the caller's needs.

Note that the consult function will put the original caller on hold while the workers discuss the transfer needs, before finally transferring the call to the second worker.



To move the original caller to the transferred entity, select the Transfer arrow icon again.



To create a conversation between all three parties – the caller, the agent, and the person that the agent intends to transfer to – it is only necessary to remove the original caller off hold by selecting the red bars.