Transfers and Conference Calls | Contact Center MAX Agent

While handling a call, you may need to transfer the contact to another agent or skill for the contact's needs to be met. You may also need to bring another contact into your current interaction.

Transferring calls

Cold Transfer

You can transfer the customer without introducing them to the next person. This is also known as a Blind Transfer. Please note that the Cold Transfer button is only available if the person you are transferring to has not answered the call.

MAX

- 1. Click Transfer/Conf.
- 2. Locate the person, group, or skill to transfer the call using these options:
 - a. Search
 - b. Directory
- 3. Click Call.
- 4. Click Cold Transfer.







RingCentral Contact Center | Transfers and Conference Calls in the MAX Agent

Warm Transfer

If you need to explain the reason for transferring to the other agent, you can use Warm Transfer.

- 1. Click Transfer/Conf.
- 2. Locate the person, group, or skill to transfer the call using these options: a. Search
 - b. Directory
- 3. Click Call. Wait for the agent to answer
- 4. Click Transfer to connect the customer to the other agent and disconnect from the call.



Conferencing calls

You may need to introduce your colleague to the caller, so they can meet while you're still there and guide them through the first interaction.

- 1. Click Transfer/Conf.
- 2. Locate the person, group, or skill to transfer the call using these options:
 - a. Search
 - b. Directory
- 3. Click Call. Wait for the agent to answer
- 4. Click **Conference** to connect the customer, you, and the other agent in a conference call.
- 5. After introducing the customer to the other agent, click Transfer.

