TRANSFER CONTROL

CONTENT

TRANSFER CONTROL

The *Transfer* web control is used for the transfer of a customer from within a scripted app, also referred to as webflow, to a specified telephone number. The control can be set up to enable a blind transfer (transferring the call without waiting for the recipient to answer), or to initiate a consultation or conference call.

To add the control to your Scripted app

- Pick up the **Transfer** icon.
- Drag it into the section design area and release the left mouse button, to add the control.

Control Name

- Enter a logical name into the **Control Name** field, for example specifying the location, or type of transfer.

Click **Next>,** to move to the **Settings page.**

Settings Page

In the *Settings* window of the **Transfer** control, select the transfer type:

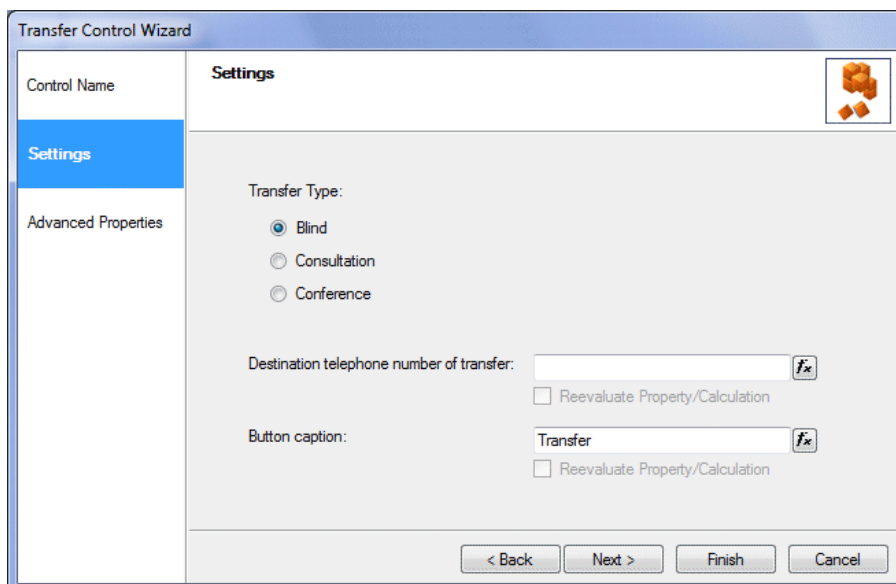| Transfer Type	Description
Blind	Instigate a blind transfer, i.e. transfer the call without waiting for the recipient to answer.
Consultation	Dial a consultation call to another agent or call centre supervisor, to ask their advice while putting the customer on hold.
Conference	Add a third participant to the call without having to put the customer on hold, with all parties (customer, agent and third participant) on the phone, for example, to introduce the customer to the third participant, before transferring the call.

- Enter the telephone number of the person or department to be contacted into the **Destination telephone number of transfer** field, or use a calculation f_x to set the telephone number.
- Use the **Button option** field, to enter the name to be displayed on the Transfer control button, or use a calculation f_x to set the button name.
- To allow for data to be changed and updated at run time, place a tick into the respective **Re-evaluate Property/Calculation** check boxes, as required.

Advanced Properties

In the **Advanced Properties** page all properties within the control are displayed and can be set using calculations. Below the properties specific to the **Transfer** control:

Property	Data Type	Description
Telephone	String	The telephone number that the current call is being transferred to.
TransferType	String	Description of the type of transfer selected (Blind, Consultation or Conference).

Displaying the Control

To display the configured web control in the Scripted app design area

- Click Finish.

Note: To display a text prompt with the control, use the Prompt web control.
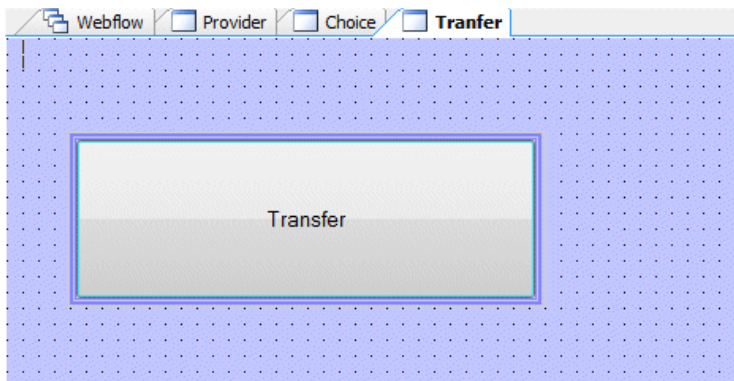
Click the *Webflow* tab to return to the scripted app view, and save your scripted app.

USE WHEN TAKING CALLS

When clicking the Transfer button in the Synthesys Portal when taking a call, you may simply transfer the call to a predefined number, or you may initiate a consultation or conference call, depending on the option your contact centre administrator has enabled when configuring the control.
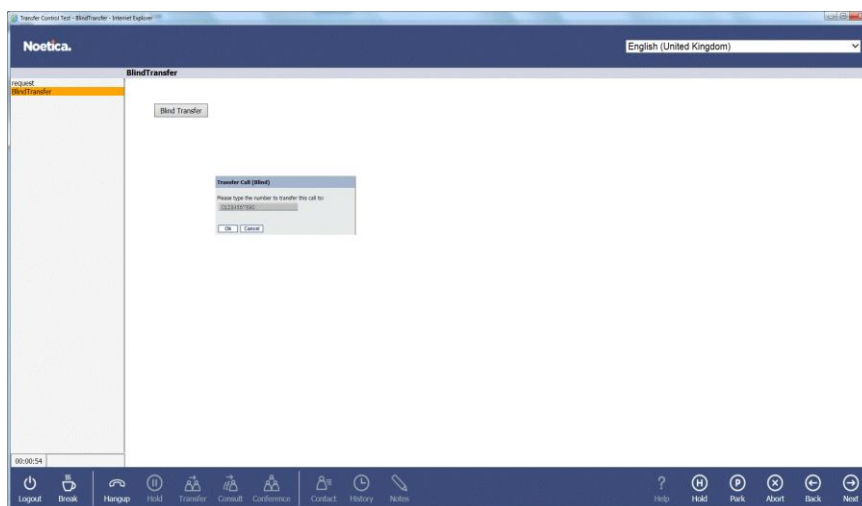
Blind Transfer

If the Transfer control has been configured to initiate a Blind Transfer, you will be able to transfer the call to a predefined number, without waiting for the recipient to answer.

To transfer the call to a predefined number

- Click the Transfer button, when reaching the section containing the Transfer control.
- The Transfer dialog will open, displaying the type of transfer that is to take place, i.e. Transfer Call (Blind).
- The telephone number to be used for the transfer is shown in the transfer dialog.

- Click OK to transfer the call.
- You can now move to the next sections in the scripted app as required and finish the call, without having to wait for the recipient to answer the phone.

Please go to the next page for information about using the Transfer control for consultation calls.
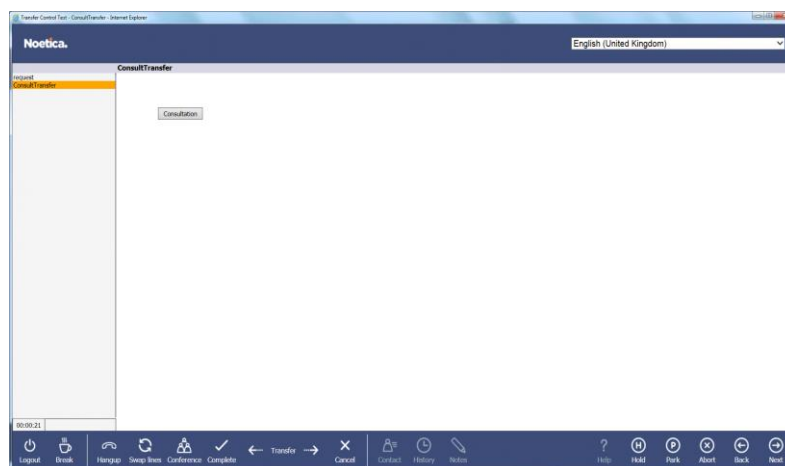
Consultation Calls

If the Transfer control has been configured to initiate a **Consultation Call,** you will be able to consult with and transfer the call to a third participant.

To dial a **Consultation** call to a predefined number

- Click the **Transfer** button, when reaching the section containing the Transfer control.
- The *Transfer* dialog now displayed will show the type of transfer that is to take place, i.e. *Initiate consultation call.*
- The telephone number to be used for the consultation is shown in the transfer dialog.
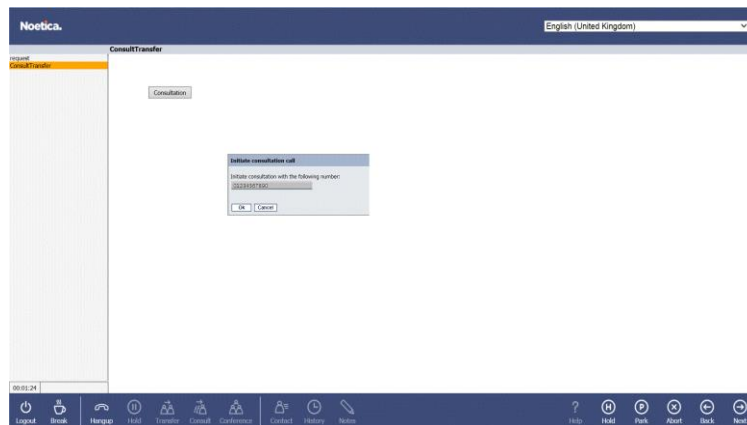
- Click **OK** to start the Consultation call.
- The *Transfer* toolbar will indicate that the <-Transfer-> is in progress.
- When starting the consultation, the customer will initially be put on hold while you consult with a third participant. You can use the ![Swap lines] **Swap lines** button to alternate between putting either the customer or third participant on hold.
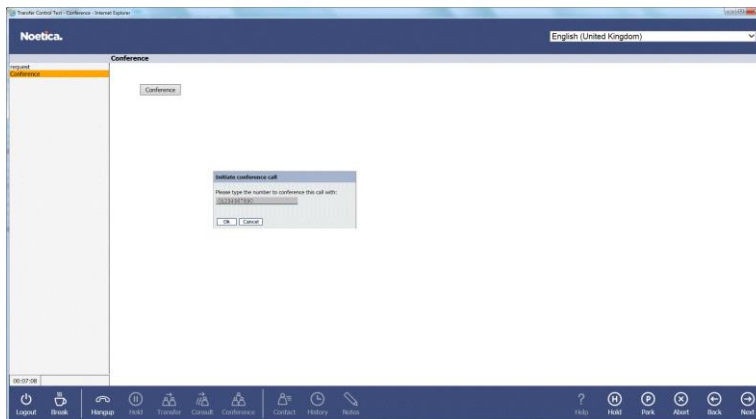

- To finish the **Consultation** with the third participant and to resume the conversation with the customer, click **Cancel** on the *Transfer* toolbar.
- **To transfer** the customer to the third participant following the consultation, click **Complete** on the *Transfer* toolbar.
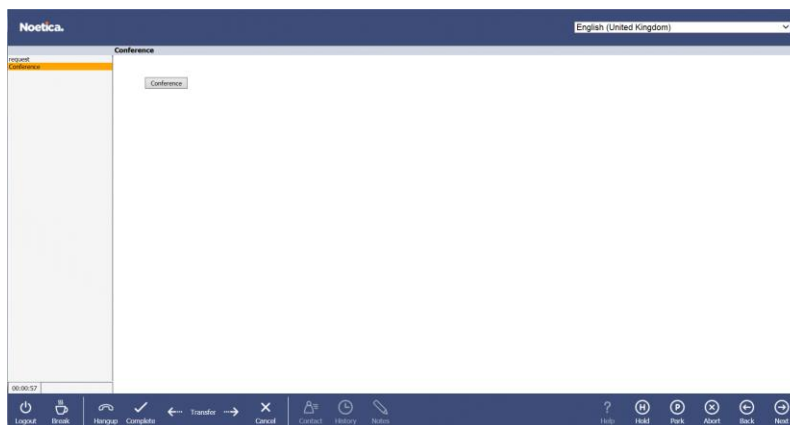
Conference Calls

If the Transfer control has been configured to initiate a **Conference Call,** you will be able to add a third participant to the call, with all parties (customer, agent and third participant) on the phone, for example, to introduce the customer to the third participant, before transferring the call.

To dial a **Conference** call to a predefined number

- Click the **Transfer** button, when reaching the section containing the Transfer control.
- The Transfer dialog now displayed will show the type of transfer that is to take place, i.e. *Initiate conference call.*
- The telephone number to be used for the consultation is shown in the transfer dialog.

- Click **OK** to start the conference call.
- The *Transfer* toolbar will show that the <-Transfer-> is in progress.
- All parties (customer, agent and third participant) will be on the line.

- To finish the **Conference** involving the third participant and to resume the conversation with the customer, click **Cancel** on the *Transfer* toolbar.
- **To transfer** the customer to the third participant following the **Conference** call, click **Complete** on the *Transfer* toolbar.