Subject: **Transferring via InContact**	**Product:** **Customer Loyalty Group**	**Approved on:**

Purpose:
Transferring calls via InContact.

Policy:
The client calls and requests to speak to another agent.

Procedure:

1. The client states that they want to speak to another agent/department.
2. Determine the appropriate agent/department for the call based on request.
    a. If client doesn't remember who they are trying to contact, check the *Comment Section* on QuickBase for last contact & any related notes.
    b. If a client is trying to reach a specific person, send that person a message on teams to see if they are available. If the representative is available, proceed to the next step. If a representative is not available, skip to step 8.
3. Ask the client if you can place them on hold.
4. On InContact, click the *Hold* button.
5. Click the *Transfer/Conf* button.
6. In the *Search* box, type the agent or department name to whom the call is for
7. If the agent is available, advise them that you have a client on the line and the issue they are calling about.
8. If the agent is unavailable, go back to client line and inform them about the status of the attempted transfer.
    a. Inform client you will advise agent/department to follow-up with them and end call appropriately.
9. Click the *Conference* button.
10. Greet the client, inform them you have an agent on the line.
11. Introduce the client and the agent.
12. Click the *Transfer* button.

Exceptions:

- You can't transfer a call that is currently conferenced.
    - One party will need to disconnect and callback.