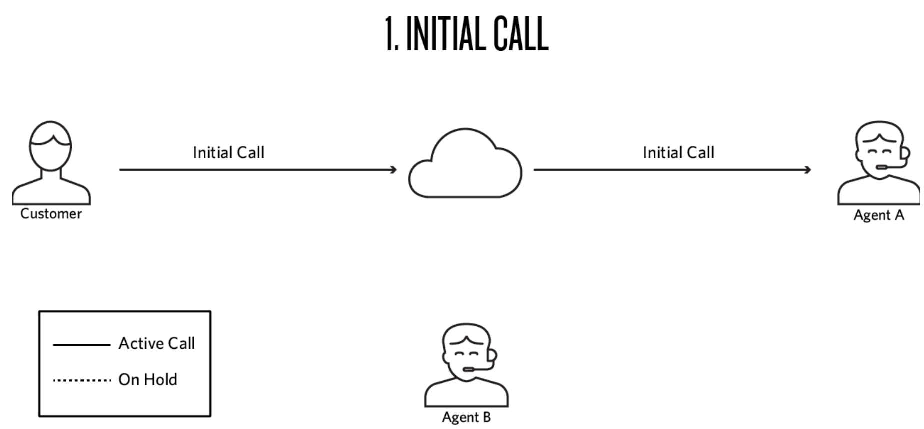
Warm Transfer - End User Guide

With call transfers, agents are able to:

- Call another agent or a queue for consultation about an ongoing customer call
- Start a conference call between another agent and a customer, and
- Transfer the customer to another agent

<u>A GIF going through the steps of the interaction:</u>



As outlined in the GIF above, a common warm transfer scenario involves the following steps:

1. The agent and customer are on an initial call. The agent (Agent A) decides they want to initiate a warm transfer.
2. Agent A initiates the transfer by calling an agent or a TaskRouter queue with the Flex UI.
3. Agent B answers the call. At this point, Agent A and Agent B can discuss the customer's needs without the customer hearing the conversation. The connection to Agent B is the **consult call**.
4. Once they're ready to transfer, Agent A can put Agent B on hold, remove the Customer from hold, and let them know who will be joining the call.

5. Agent A can now remove Agent B from hold. This will allow Agent A, Agent B, and the Customer to all speak at the same time.
6. Agent A can leave the call. Agent B and the Customer will continue the conversation. The warm transfer is now complete.

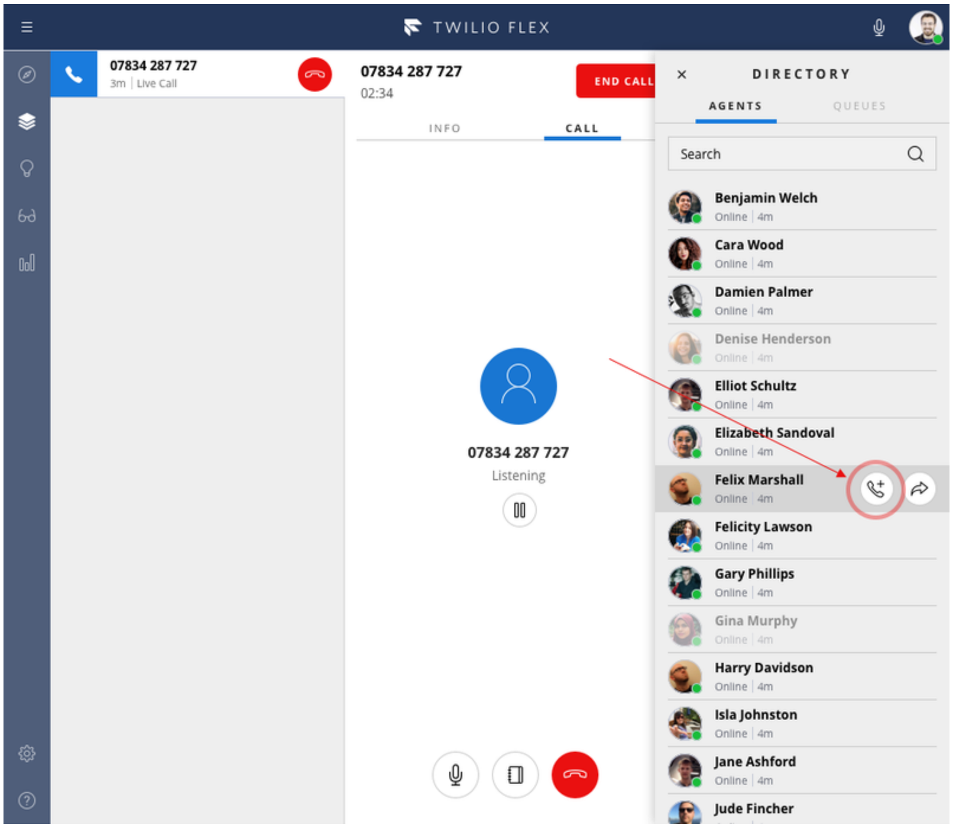
[warning-note] This feature is in public beta and requires version 1.11 or greater of the Flex UI. You can enable warm transfers on the pre-release features page within Flex Admin.

In order for Warm Transfer to work, agents must be on a **live, conference-based call**. The agent cannot be in the middle of another transfer, and the agent must be active (i.e., not on hold.)

Finally, if you're having trouble initiating a Warm Transfer on a project that hasn't been used recently, you may run into an issue with transferring to a TaskQueue that hasn't been used in the last 30 days. Create an inbound Task that routes to that Queue in order to reset it, and try initiating another Warm Transfer.

Transfer directly to an Agent

1. Open the Directory in the Flex UI
2. Go to **Agents**
3. Find the agent you want to call and click the phone icon to initiate a warm transfer

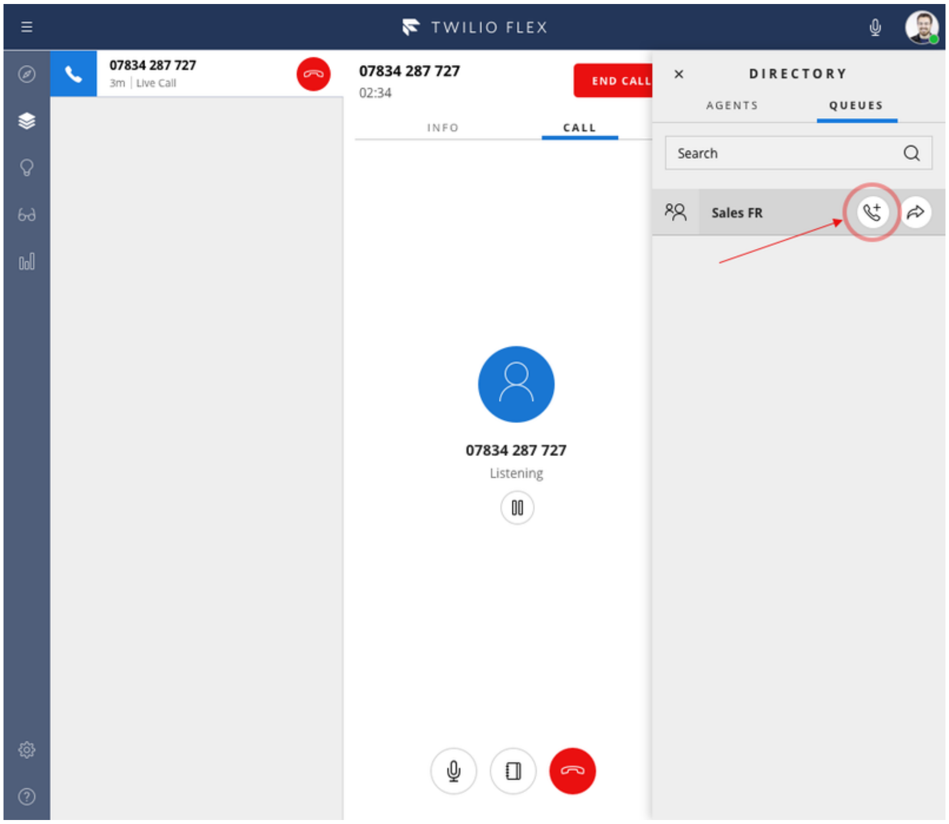


[warning-note] **Transfer directory hidden filters** - starting from @twilio/flex-ui@1.26.0 and later, you can programmatically pre filter the list of agents or queues in the directory. Agents accessing the directory to initiate a call transfer will view and search only in that prefiltered subset. For example, you can choose to display and search only agents with available status or on the same team. To learn more about Transfer directory hidden filters, go to programmability overview of Flex UI Components.

[info-note] To cold transfer to an agent/queue instead, you can click on the arrow icon instead of the phone icon.

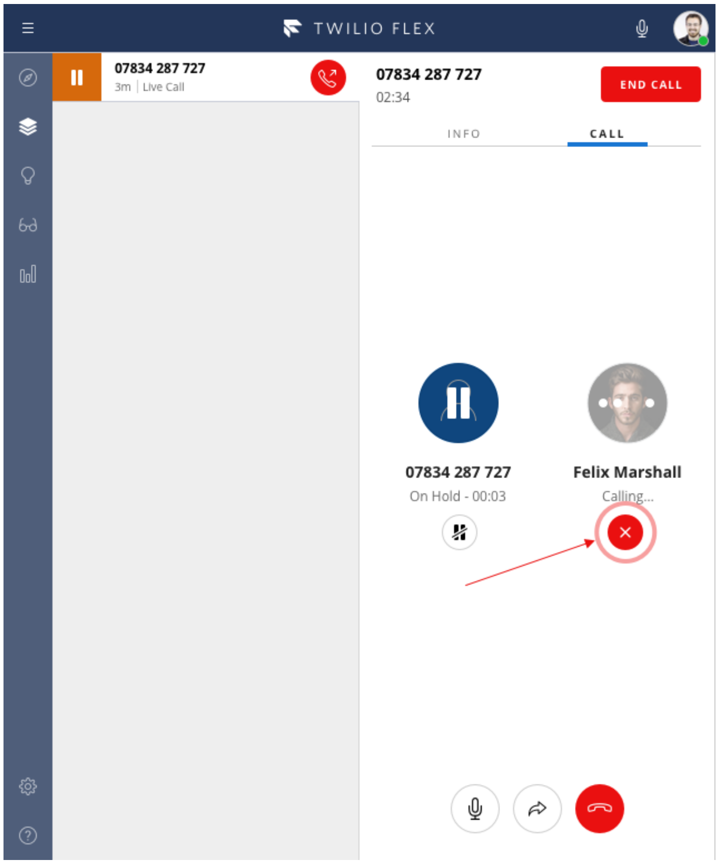
Start a Consult Call to a Queue

1. Open the Directory in the Flex
2. Go to **Queues**
3. Find the queue you want to call and click the phone icon.



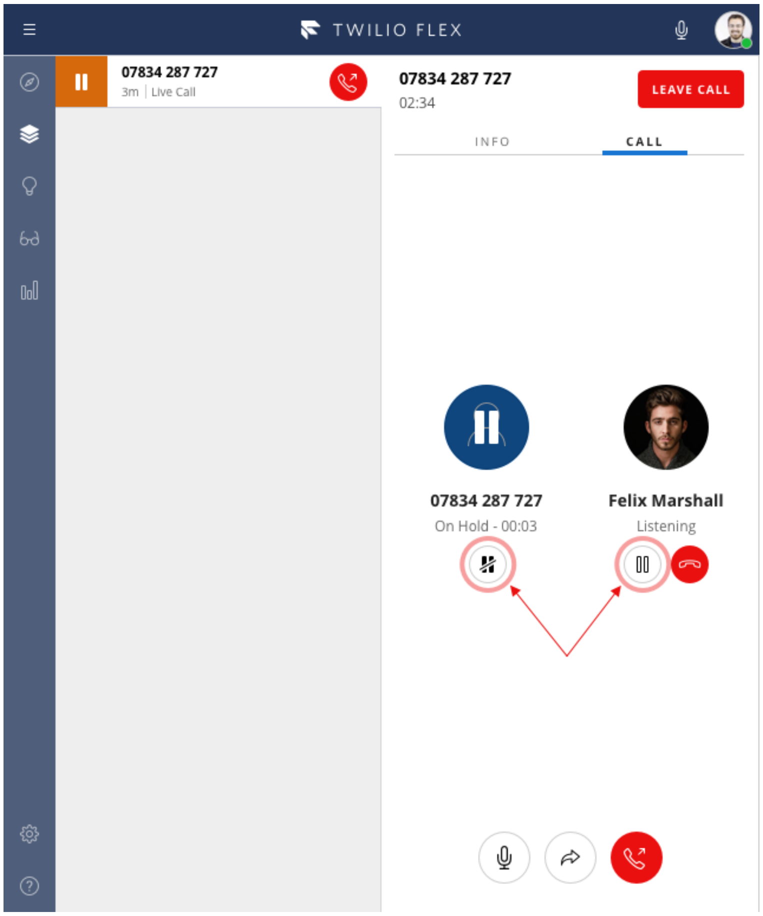
Cancel a Consult Call

While waiting for Agent B to accept or reject the call, Agent A can press the red X near Agent B's name to cancel the call and get back to the customer.



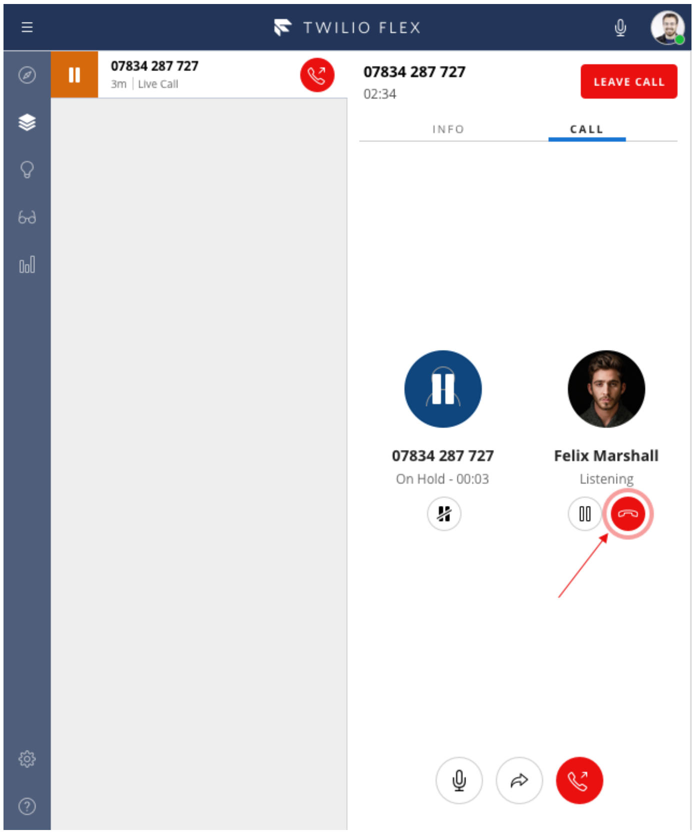
Toggle Between Customer Call and Consult Call

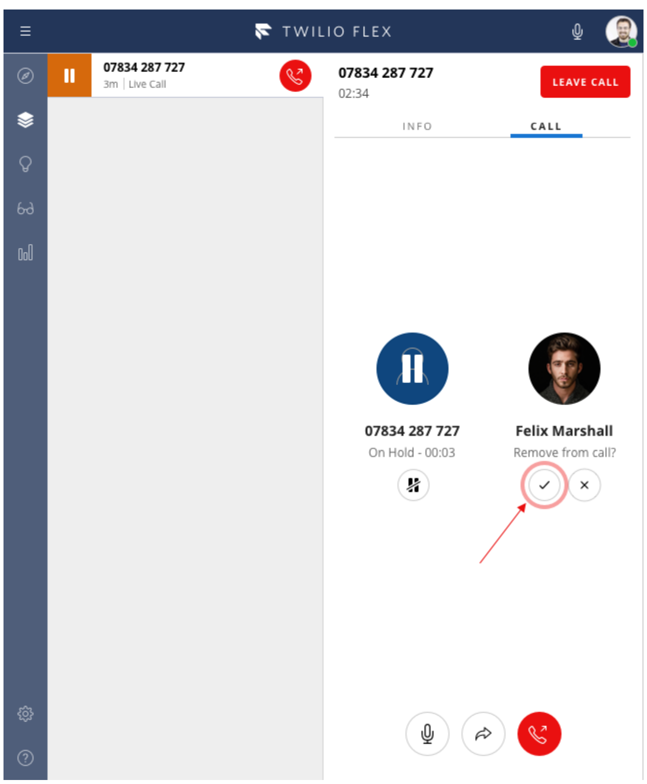
To toggle between the customer call and the consult call, put one participant on hold and unhold the other participant.
To allow all three participants to speak at the same time, unhold both calls.



Remove an Agent from the Conference Call

An agent can remove another agent from the conference by clicking on the red circle with a phone icon under the agent's name. The agent will need to confirm the action by clicking on the check mark.

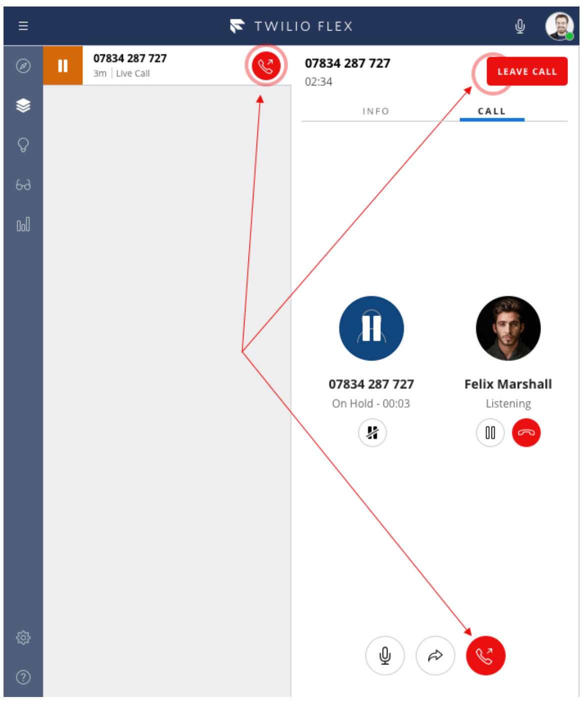

TWILIO FLEX
07834 287 727
3m | Live Call
07834 287 727
02:34
LEAVE CALL
INFO
CALL
07834 287 727
On Hold - 00:03
Felix Marshall
Listening


TWILIO FLEX
07834 287 727
3m | Live Call
07834 287 727
02:34
LEAVE CALL
INFO
CALL
07834 287 727
On Hold - 00:03
Felix Marshall
Remove from call?

Complete the Warm Transfer

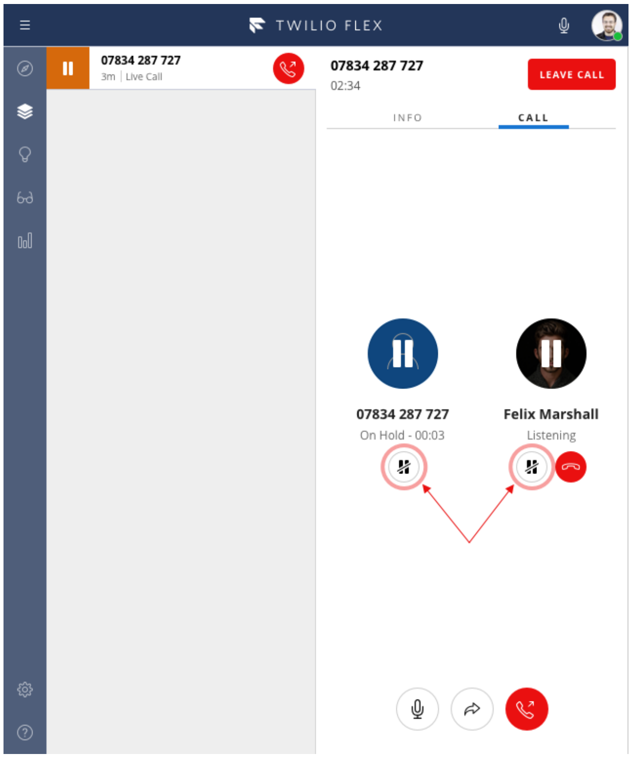
To leave the call, click the red **Leave Call** button or the button with an icon of a phone with an arrow. Agent B will continue the call with the Customer, and the Warm Transfer will be complete.

If Agent B was put on hold before Agent A left, Agent B can unhold themselves and continue the conversation with the customer.



Connect all Callers

Click on the filled in pause icon to unhold any participant. When all calls have a status of *Live*, participants can talk to each other. This is also known as a *call merge*.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