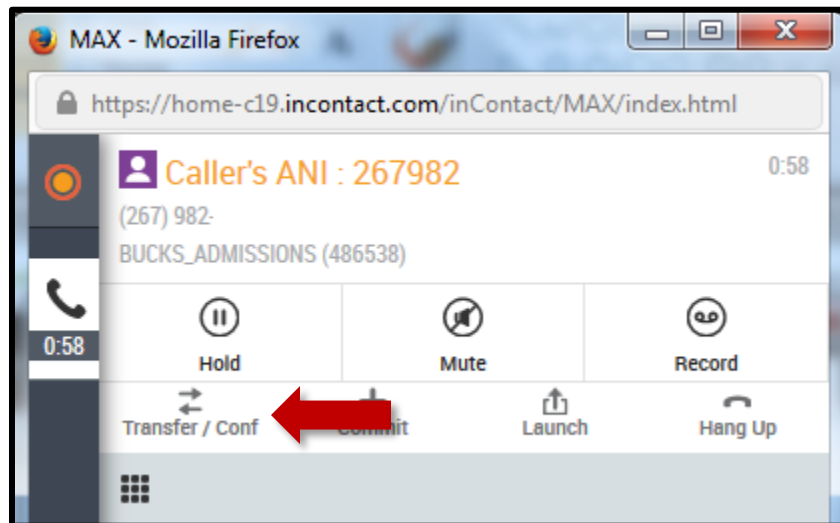


## MAX Agent – Transferring Calls or Creating Conferences

When you receive a phone call, you may not be able to answer the question and will need to transfer or conference the call. There are two types of transfers, a **warm transfer** and a **cold transfer**.

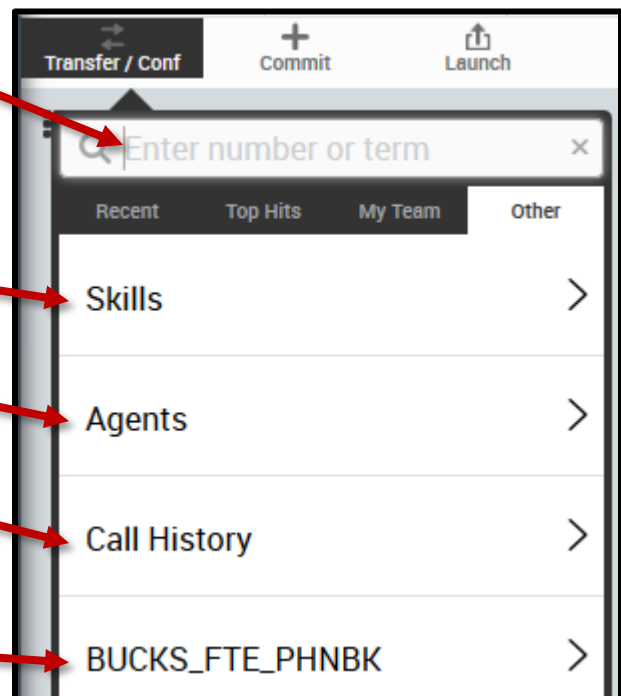
A **warm transfer** is the preferred transfer type as you will be passing on all relevant information such as the caller's name, ID number, what their problem is, and what you have already discussed. A **cold transfer** puts the caller directly in touch with the person you have transferred to. The caller will need to repeat their information again which can lead to frustration.

1. After alerting the caller that you intend to transfer or conference the call, click the **Transfer / Conf** button in the MAX agent.



2. A menu with a list of transfer options will appear.

- **Search** – Allows you to search the Bucks phone directory by typing in a name.
- **Skills** – If you wish to transfer to a specific queue (such as Admissions, Financial Aid, or Student Accounts)
- **Agents** – If you wish to transfer to a specific person that is part of a call queue.
- **Call History** – Shows recent calls.
- **BUCKS\_FTE\_PHNBK** (College directories) – If you wish to transfer to a specific person that is **not** part of a call queue. This list is rather long so it might be better to use the search at the top.



3. After you have found the appropriate party to transfer or conference the call to, the following options will appear in the MAX agent.
  - A. The caller will be on hold while you perform a transfer. Notice the **Hold** option (under the original caller) is highlighted in red.
  - B. To finalize the transfer, click the ↓ **Transfer** button.
  - C. To conference all three parties, click the ↑ **Conference** button.
  - D. If for some reason the person you are transferring the call to is unavailable or otherwise unable to assist you, click the **Hang Up** button. This will return you to the original caller who should still be on hold. You can attempt to transfer the call to a different person or call queue at this point.

