I-Tel: Transferring Calls Quantrax Corporation Inc.

**Instructions for *Predictive* & *Progressive* Campaigns:  
 Agents cannot receive transferred calls to their *outbound* extension**

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| **To Request A Transfer….**   1. From the *Account* *Detail* screen, for the *Smart* *Code* type **T** and press **Enter** (T-Enter) and the *Transfer* *window* displays  |  |  | | --- | --- | |  | **➀ *CONFERENCES*** *the call and the Account Detail screen for both you and*  *the other party* to discuss/review  **➁** ***TRANSFERS*** the call and *Account* *Detail* screen to the extension   entered and *disconnects you immediately*   * Leaving this option blank conferences you and the agent before you send or reject the call to them * If call is sent back to you, in **Smart** **code** field:   + Type **SAT** (*Sent Accepted Transfer*) to *accept* call   + Type **RRT** (*Retrieve Rejected Transfer*) to *reject* call   **➂** ***SENDS ONLY*** the call without the *Account* *Detail* screen | | | | |
| **…To Blended Calls & Transfers:** | | **...Transfer To Inbound Extension:** | |
| **BEEP!**      **SAT**      **X –Enter** | 1. Step 1 (above) and you will hear a *BEEP*, and a transfer message will display on the bottom of the screen 2. You will automatically be *CONFERENCED* with the *transferring* agent (the Debtor *will* *not* be able to hear either of you) 3. Press **F20** to display the transferred account      1. In *Account* *Details*, type **SAT** in the **Smart** **code** field means to accept call and disconnects the Transferring agent (use **REJ** to reject) 2. To *DISCONNECT* the call, in the *Smart* *code* field enter **X** and press **Enter** (**X**-**ENTER**) 3. To end call, press **F7** until multiple times to exit account and resume original call on Line 1 | **I**    **ACC** | 1. Step 1 (above) and your 2nd Phone Line will *RING* 2. Place outbound line on **HOLD** to *not* get disconnected (Logoff RMEx and sign back in if this happens) 3. Answer Line 2 4. Press ***ESC*** (the **Attention** Key on IBM keyboard) 5. Inbound call list displays with the debtor info and who transferred the call *and*    you are *CONFERENCED* with the Transferring agent (The Debtor *cannot* hear either of you) 6. Type **I** next to the transferred call and press **Enter** 7. In Account Details, type **SAT** in the *Smart* *code* field to accept call and disconnect the Transferring agent (type **REJ** to reject) 8. To end call, press **F7** multiple times to exit account and resume original call on Line 1 |

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**Tips & Frequently Asked Questions**

Transferring gives you the ability to move a call (and optionally an account) to another Agent. During the Transfer you can talk (Conference) with the other agent, without the Debtor hearing this conversation.

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| **First Time Transferring and What to Expect** | | |
| **There are two types of stations you can transfer a call to:** | 1. **Valid Extension** –Extension where an agent *must* be logged into the Dialer to receive a call. This agent can review the *Account* *Detail* screen, discuss the call with you, and can choose whether to **ACCEPT** (ACC) or **REJECT** (REJ) the call. 2. **NNE (Non-Nailed up Extension)** – The person at this extension *does* *not* need to be logged into the Dialer. When you transfer a call to a *NNE*, they *do not* have the ability to **ACCEPT** or **REJECT** a call; you as the Transferring agent *must* do it | |
| **Things to Remember** | * **HOLD – When in doubt put the debtor on HOLD,** *and review the steps above. Do not just push buttons or you may lose your Dialer connection, AND one or both of the calls.* * **HOLD – always remember to use your hold button before taking an inbound Transfer.** * **If you lose connection to the Dialer, just sign out of Intelec, and sign back on. Finish up with the debtor, then log back into the Dialer.** | |
| **Sending Transfers FAQs** | | |
| **What if you transfer to an Agent that is not logged in?** | The transfer will not go through, you will retain the call and the account | |
| **What if you get a voice mail OR you just want to grab the call back?** | You can retrieve a call back as long as the other agent has not accepted it, if **you** put **ACC** in the Smart Code field and hit Enter. This means YOU have accepted (ACC) that call. | |
| **Receiving Transfers questions** | | |
| **What if you hit LINE 2 *BEFORE*, you put LINE 1 on HOLD** | * YOU MAY LOSE YOUR CONNECTION TO THE DIALER and you may have hung up on line 1. Some phone systems will automatically put LINE 1 on hold. But do not assume this is the case. If you lose connection to the dialer. Sign off of your Intelec session, sign back in, finish working with the Debtor and sign back into the Dialer. | |
| **Blended Agents** | | |
| **Predictive Blended Agent** | | **Preview Blended Agent** |
| * If you have an **account** on your screen, you *will not* receive a transferred call to your OUTBOUND extension.   **NOTE**: Even if you *do not* have a debtor on the phone; if an overflow is setup the call may roll to your inbound ext.   * If you are in *Wait* mode, the call *will* go to the outbound extension as a *Blind Transfer* and the Debtor’s account will pop-up | | * If you are talking to a debtor on your outbound extension. you *will not* receive a transferred call to the outbound extension * If you are *not* talking but have an account up on the screen, the debtor will automatically go to your outbound extension; you will be accepting the call automatically (Blind Transfer) and you will have to press **F20** to pull up the transferred account |