



Transfers and Conferencing

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Reports on Agent Call Transfers and Conferences

You can transfer or conference voice calls.

Transfer can be either blind or consultative and is supported only for agents within the ACD. A *blind transfer* is a transfer in which the agent transfers the call to another agent without first ensuring that another agent is available. A *consultative transfer* is a transfer in which an agent places the call on hold, calls the receiving agent to discuss the transfer, and then transfers the call to the agent. Consultative transfer is not supported when Unified CVP is used as the VRU.

It is best to discourage direct agent-to-agent transfers. Instead, use ACD numbers to transfer to a Skill Group and application service. This enables tracking of these calls and allows you to report on how calls were eventually handled. You can also post route calls to Webex CCE, which allows you to transfer calls to agents on other ACD sites and to be able to report on those calls.

Related Topics

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Transfer and Conference for Non-voice Tasks

Enterprise Chat and Email Tasks

Transfer and conference are not supported for Enterprise Chat and Email tasks, such as email and chat tasks.

Third-party Multichannel Tasks

You can transfer non-voice tasks routed to Webex CCE from third-party multichannel applications that use the Task Routing APIs. Only blind transfer is supported. In this chapter, all blind transfer-in and transfer-out reporting information applies to these types of tasks.

You cannot conference these tasks.

For configuration instructions for Task Routing for third-party multichannel applications, see the *Cisco Unified Contact Center Enterprise Features Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-enterprise/products-feature-guides-list.html>.

For scripting information for Task Routing for third-party multichannel applications, see the *Scripting and Media Routing Guide for Cisco Unified ICM/Contact Center Enterprise* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-enterprise/products-user-guide-list.html>

Transfers and Conferences Using ACD/Dialed Numbers (Webex CCE)

Transfers and conferences can be handled at the ACD, with ACD queuing, or through Webex CCE using ACD/Dialed Numbers, with Enterprise Queuing.

For ACD and local queuing, reporting statistics are accurate when the agent uses an ACD number and the script on the ACD queues and sends the call.

TransferOut or ConferenceOut is incremented for the source agent and TransferIn or ConferenceIn is incremented for the target agent.

For Enterprise Queuing, when the agent activates the transfer or conference button and selects a number to which to transfer or conference the call, the dialed number is sent to the CallRouter from the agent PG. This dialed number determines the Call Type, which in turn selects the transfer routing script. A Webex CCE script must include a Queue to Skill Group node that references the appropriate skill group based on the dialed number to which the call is to be queued.

If an agent is available in the selected skill group, a message is sent to the source agent PG, containing a label or dialable number. The PG transfers the call from the source agent phone to the target agent using the label returned from the Central Controller. For these types of transfers and conferences, TransferOut or ConferenceOut increments for the source agent and TransferIn or ConferenceIn increments for the target agent.

If no agents are available for a transfer in the selected skill group, the CallRouter sends the source agent's PG the label to forward the call to the VRU. For these types of transfers and conferences, TransferOut or ConferenceOut increments for the source agent. However, TransferIn or ConferenceIn increments for the target agent when the VRU routes the call to the target agent only in Webex CCE with a System PG. This difference is also applicable when you use a System PG with Unified CVP in Webex CCE deployments.

How Database Fields Are Affected by Transfers and Conferences

Transfers and conferences affect fields in the Agent_Skill_Group_Interval database table.

The TransferIn field is incremented for the target agent if all of the following conditions are true:

- The call was transferred (blind or consultative) by an agent to a Webex CCE Call Type script or to an application script on the ACD that checks for agent availability.
- For blind transfers only, an agent within the same peripheral was available at the time that the transfer was initiated.

The ConferenceIn field is incremented for the target agent receiving the conference call if all of the following conditions are true:

- The call was conferenced by an agent to a Webex CCE Call Type script or to an application script on the ACD that checks for agent availability.

- An agent within the same peripheral was available at the time that the conference was initiated.

The TransferOut field is incremented for the agent initiating either a blind or consultative transfer when the initiating agent disconnects from the transfer.

The Conference Out field is incremented for the agent initiating a conference when the initiating agent disconnects from the conference.

The ConsultativeCalls field is incremented for the initiating agent when the consultative call disconnects and wrap-up is complete.


Note

- Consultative transfer is not supported for systems using Unified CVP as the VRU and therefore this field is never incremented if you are using Unified CVP.
- If you are using Unified CVP as the VRU, the transfer can be performed through a network transfer. If the network transfer is used, the TransferIn and TransferOut fields do not display data for these transfers.

How Types of Calls Are Affected by Transfers and Conferences

The following table describes the fields that increment in the Agent_Skill_Group_Interval database table when different types of calls are transferred and conferenced.

Table 1: How Transfers and Conferences Affect Types of Calls

Type of call	How the call is affected
Outgoing internal	The InternalCall field increments for the source agent that starts a transfer or conference operation if the target agent is on the same ACD as the source agent. This field increments after the call disconnects.
Incoming direct/incoming internal	The InternalCallsRcvd field increments for the target agent who completes a transfer or conference if the agent dialed the target agent directly (that is, does not access a routing script). This field increments after the call disconnects.
Outgoing external	The AgentOutCalls field increments for the source agent who completes a transfer or conference to an external destination. This field increments after the call disconnects.
ACD calls	The CallsHandled field increments for the target agent if an ACD routing script sends the call to the agent. This field increments against the skill group to which the routing script queued the call. This field increments after the call disconnects and wrap-up completes.

How Skill Groups Are Affected by Transfers and Conferences

The skill group for which transfer and conference data is reported depends on how the original call was placed.

The transfer or conference is reported for the ACD-picked skill group if the original call is a direct call, placed to the agent's extension. For example, if an agent received a call directly to the agent's own extension and then

transferred the call, the transfer is reported for the ACD-picked skill group of both the agent who initiated the transfer and agent who received the transfer.

The transfer or conference is reported for the skill group to which the call was routed if the original call was routed via an ACD routing script to a specific skill group. For example, if an agent in the Sales skill group received a Sales call and then transferred the call, the transfer out is reported for the Sales skill group. The transfer in is reported for the skill group of the agent who received the transfer.

The following scenarios further explain how database fields are incremented for different types of transfers and conferences.

Call Scenario 1: Blind Transfer of ACD Calls—Agent Is Not Available

In this example, agent A is presented with an ACD call for skill group Y. Agent A selects skill group X via the ACD number (which accesses a script) and initiates and completes a blind transfer. The InternalCalls and TransferOut fields are then incremented for agent A against skill group Y.

After wrap-up is completed, the CallsHandled field is incremented for agent A against skill group Y. Since there are no agents available in skill group X, the call queues on the ACD. When agent B in skill group X becomes available, the ACD routes the call to agent B. Agent B answers the call and the call disconnects and wrap-up is complete.

Table 2: Blind Transfer of ACD Calls—Agent Is Not Available

Fields incremented for agent A against skill group Y	Fields incremented for agent B against skill group X
CallsHandled, InternalCall, TransferOut	CallsHandled, TransferIn

For agent A, the call is reported in the TasksHandled, Internal Out, and TransferOut report fields. For agent B, the call is reported in the Tasks Handled report fields.

Call Scenario 2: Consultative Transfer of an ACD Call—Agent Available

In this example, agent A is presented with an ACD call for skill group Y. Agent A selects skill group X via the ACD number and initiates a transfer. The script on the ACD realizes that agent B is available and requests that agent A's PG initiate a transfer to agent B on behalf of agent A's phone. Agent B answers the transferred call. After consulting with agent B, agent A completes the transfer. The InternalCall and TransferOut fields are then incremented for agent A against the skill group Y. After wrap-up is completed, the CallsHandled field is incremented for agent A against skill group Y.

Agent B now talks to the caller. When the call disconnects and wrap-up is completed, CallsHandled and TransferIn are incremented for agent B against skill group X.

Table 3: Consultative Transfer of an ACD Call—Agent Available

Fields incremented for agent A against skill group Y	Fields incremented for agent B against skill group X
CallsHandled, InternalCall, TransferOut, Hold	CallsHandled, TransferIn

For agent A, the call is reported in Tasks Handled, Internal Out, Transfer Out, and Incoming Hold and/or All Hold report fields. For agent B, the call is reported in Tasks Handled and Transfer In report fields.

Call Scenario 3: Consultative Conference of a Direct Call

In this example, a direct call comes into agent A's ACD extension.

Agent A selects skill group X via the ACD number and initiates a conference. The script on the ACD realizes that agent B is available and requests that agent A's PG initiate a conference to agent B on behalf of agent A's phone. Agent B answers the conferenced call. After consulting with agent B, agent A completes the conference.

Agent A disconnects from the conference. The InternalCalls and ConferenceOut and InternalCallsRcvd fields are then incremented for agent A against the ACD-picked skill group.

Agent B or the caller disconnects. InternalCallsRcvd and Conference Out are incremented against the ACD-picked skill group for agent B.

Table 4: Consultative Conference of a Direct Call

Fields incremented for agent A against ACD-picked skill group	Fields incremented for agent B against skill group X
InternalCallsRcvd, InternalCall, ConferenceOut, Hold	CallsHandled, ConferenceIn

For agent A, the call is reported in Tasks Handled, Internal Out, Conf Out, and All Hold (Internal Hold) in report fields. For agent B, the call is reported in Tasks Handled and Conf In report fields.

Call Scenario 4: Consultative Call

In this example, agent A is presented with an ACD call for skill group Y.

Agent A selects skill group X via the dialed number and initiates a consult. The script that uses the LAA Select node for skill group X realizes that agent B is available and requests that agent A's PG initiate a conference to agent B on behalf of agent A's phone. Agent B answers the consult call. After consulting with agent B, agent A activates the Reconnect button, which disconnects agent B and agent A resumes talking to the caller.

Agent A disconnects from the call. After wrap-up is completed, CallsHandled and Consultative Calls field are incremented for agent A against skill group Y.

Table 5: Consultative Call

Fields incremented for agent A against skill group Y	Fields incremented for agent B against skill group X
CallsHandled, InternalCall, ConsultativeCall, Hold	CallsHandled

For agent A, the call is reported in Tasks Handled, Internal Out, Cons Out, and Incoming Hold and/or All Hold report fields. For agent B, the call is reported in Tasks Handled report fields.

Agent Transfer and Conference Reports

The following report displays agent transfer and conference data:

- Unified Intelligence Center: Agent Historical All Fields

About Transfers and Conferences

Contact center enterprise solutions support transfers and conferences directly to agents and also to skill groups.

Follow these guidelines to obtain accurate and useful data from transfers and conferences:

- Configure the dialed numbers with associated route points for transfer and conference to agents and skill groups.
- Plan to create a separate script for transfers that use the dialed numbers you configured. In the initial script, change the call type such that when the call is transferred, it is directed to the transfer script. Having a separate script allows you to track data across call types and skill groups, instead of the agent's default skill group.
- The agent can manually transfer the call to another agent or can conference in another agent by dialing that agent's extension directly on the ACD.
- The agent can use the ACD number to access a routing script on the ACD or can optionally post-route the call to Webex CCE.

The latter method is appropriate, since Webex CCE will be able to track the transferred calls and how they are handled across the enterprise. This also provides the ability to transfer the call to another ACD site.

Avoid direct agent-to-agent transfers, as you must rely on the ACD for skill group and service assignment for the purposes of reporting. In situations where you are handling transfers and conferences on the ACD itself, use the ACD number to control how transfers are reported.



Note Webex CCE will be unaware of a direct transfer if the agent extension is not configured.

If you are planning to provide for transfers and conference calls using post-routing, follow these guidelines to obtain accurate and useful data:

- Configure the ACD number to post-route the call to Webex CCE.
- Consider creating separate scripts for transfer and conference scenarios if you are post-routing all transfers and conferences.
- Plan to create a separate script for transfers on Webex CCE that uses the dialed numbers you configured. Having a separate script on the ACD or on Webex CCE allows you to track data across all known skill groups.



Note If you do not do this, the skill group affected by reporting statistics is unknown, and results are unpredictable.



Note Refer to your *ACD Supplement Guide* for any restrictions that might affect the transfers and conferencing. For example, some ACDs do not support blind transfers.

Configuration and Scripting for Transfers and Conferences

Follow these guidelines when configuring and scripting for transfers and conferences to skill groups:

Procedure

- Configure dialed numbers.
- Create new call types or identify existing call types and associate the call types with the Dialed Numbers.
- Create a routing script for transferring to skill groups that includes a Queue to Skill Group node. This script ensures that transferred and conferenced calls are queued to the correct skill group.
- Associate the call type with the routing script.

