

HOW TO TRANSFER CALLS:

1. Press **hold**
2. Click **Transfer**

The screenshot shows the Five9 interface during a live call with the number +13122861540. The top status bar indicates 'Ready (Voice)' and '0:11'. The left sidebar contains navigation icons for Home, Call, Voicemail, Contacts, and My Activity. The central area displays the 'CURRENT CALL' with the number +13122861540 and a 'Hold' button. Below this are buttons for 'Transfer...', 'Mute', 'Park', 'Conference...', and 'Keypad'. A 'Record Call' button and a 'Select Audio File...' dropdown are also visible. The right-hand panel shows the 'Live Call' status with a timer at 0:09 and a 'SET DISPOSITION' button. Below this is a yellow banner stating 'There are 2 Contact Records matching this phone number, select the appropriate contact.' The contact information section includes fields for Primary Phone, Alt Phone 1, Alt Phone 2, First Name, Last Name, Company, Street, City, State, Zip, email, and salesforce_id. The 'Last Agent' field shows 'travis.salisbury@nl.edu'. The 'Contact Record Type' field is empty. The 'History' section on the right lists three calls: 'Contact Complete-Follow-up' (Today 10:22 am, Travis Salisbury), 'Contact Complete-Follow-up' (Today 10:18 am, Travis Salisbury), and 'Transferred To 3rd Party' (Thu, 04/23/2026, 3:14 pm, Travis Salisbury). The 'No Disposition' call is listed for Wed, 04/15/2026, 2:55 pm, Anthony Zavala.

1. Select **Warm** (if not selected)

The screenshot shows the 'TRANSFER' dialog box in the Five9 interface. The top bar has a right arrow and the word 'TRANSFER'. Below this is a 'Transfer to:' label and a search bar with the placeholder text 'Type name or number...'. To the right of the search bar is a 'Select Contact...' button. Below the search bar is a 'Hide Transfer Options' link. The 'Type' section has two buttons: 'Warm' (selected) and 'Cold'. At the bottom, there is a 'Cancel' button, a 'Disposition' dropdown menu set to 'Transferred To 3rd Party', and an 'Initiate Transfer...' button.

1. To **directly transfer** call to agent
2. Type in agents' name

Transfer to:

Recent (1)

Travis Salisbury (+18154133347)	O365_Tea...
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Address Book (4)

National Louis University (0000, travis.salisbury@nl.edu)	Agent
travis.salisbury@nl.edu	Skill
Travis Salisbury (+18154133347)	O365_Tea...
Travis Morgan (+18154133762)	O365_Tea...

1. To transfer to a queue click **Select Contact**
2. Type in **Skill Queue** and transfer to the correct queue.

MS Teams Connected

Any Groups ▾ Any Roles ▾ Any States ▾ By Name ▾

▼ **Skills (24)** Contact Center Group

- Skill Queue_Academics-AccelerateU
- Skill Queue_Academics-CPBS
- Skill Queue_Academics-GSBL
- Skill Queue_Academics-Kendall
- Skill Queue_Academics-NCE
- Skill Queue_Academics-UGC
- Skill Queue_Advising-Florida
- Skill Queue_Advising-Illinois
- Skill Queue_Advising-OneStopDesk
- Skill Queue_Advising-UGC-Freshman
- Skill Queue_Enrollment-AccelerateU
- Skill Queue_Enrollment-Florida
- Skill Queue_Enrollment-GSBL-CPBS
- Skill Queue_Enrollment-International
- Skill Queue_Enrollment-Kendall

1. Click **Complete Transfer**

CURRENT CALL1

Inbound: none

+13122861540

Warm Transfer

Travis Salisbury (+181541333...)

Show Keypad

Toggle Hold (0:04)

Complete Transfer

Cancel Transfer

Live Call (On Hold)

+13122861540

INTERACTIONHISTORYSCRIPTCONNECTOR

There are 2 Contact Records matching this phone number, select the appropriate contact.

Primary Phone

+13122861540

Alt Phone 1

Alt Phone 2

First NameLast Name

Company

Street

CityStateZip