

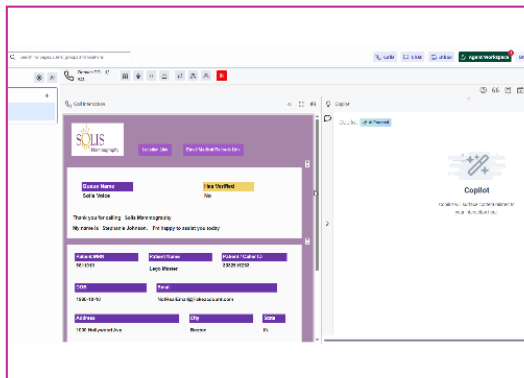
Consult (Warm Transfer)

Last Modified on 01/16/2026 5:16 pm EST

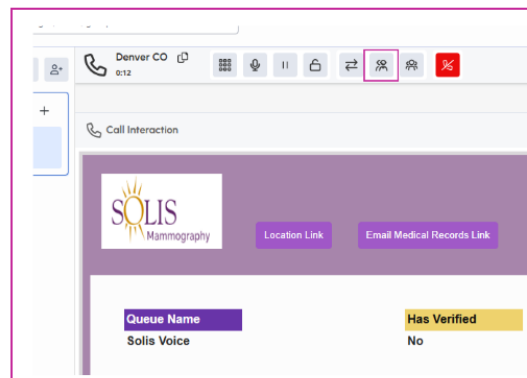


Consult (Warm Transfer)

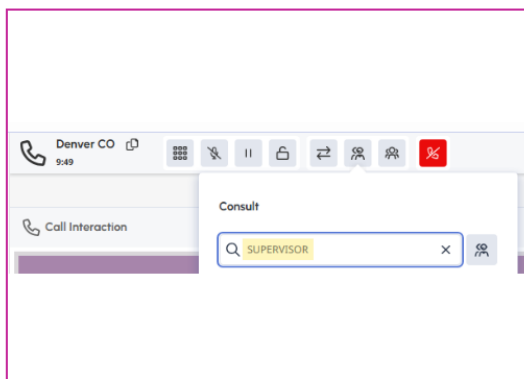
Speak with a third party before transferring or conferencing



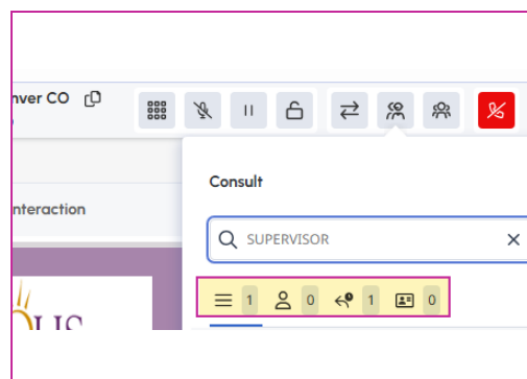
1 Confirm you are on an active call.



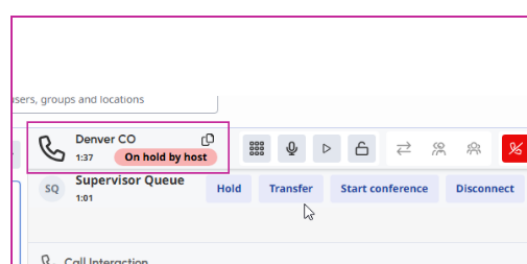
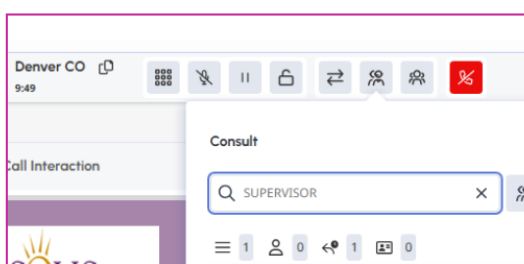
2 Select **Consult** from the call controls.

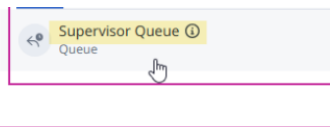


3 Select the search field.
Type the name of the destination.



4 Review the available filter options:
- All
- Users
- Queues
- External Contacts

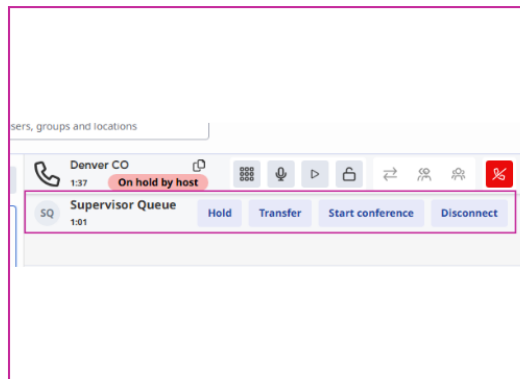




5 **Select** the correct destination from the results list.



6 **Speak** privately with the third party while the caller remains on hold.



7 **Select** one of the following options:

- **Hold**
- **Transfer**
- **Start Conference**
- **Disconnect**

Important Notes:

- Consult is the preferred option when you need to speak with another party first.
- Ending the consult without transferring returns you to the caller.
- Consult does not automatically transfer or conference the call.
- **Hold:** Places third party on hold, allowing you to return to the original caller.
- **Transfer:** Transfers the original caller to the third party, removing you from the call.
- **Start Conference:** Joins the original caller, third party, and yourself into one call.
- **Disconnect:** Removes the third party from the line, allowing you to return to the original caller.