

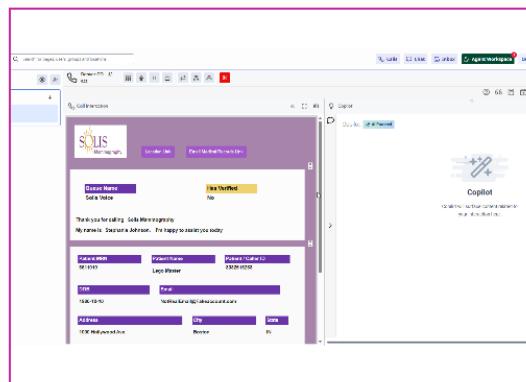
Consult (Warm Transfer)

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

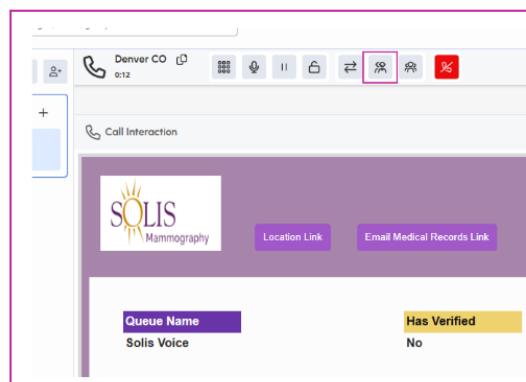


Consult (Warm Transfer)

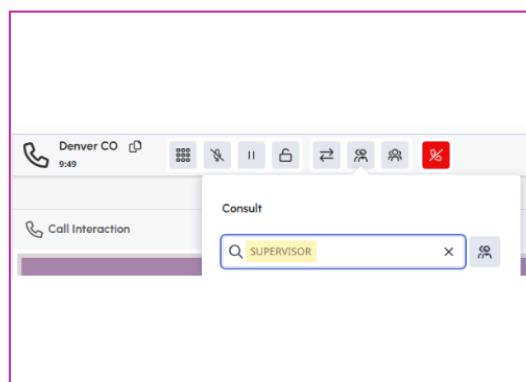
Speak with a third party before transferring or conferencing



1 Confirm you are on an active call.

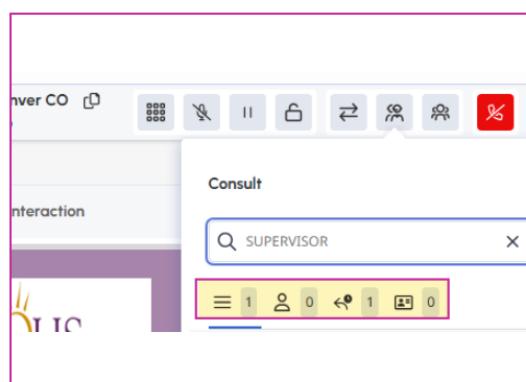


2 Select **Consult** from the call controls.



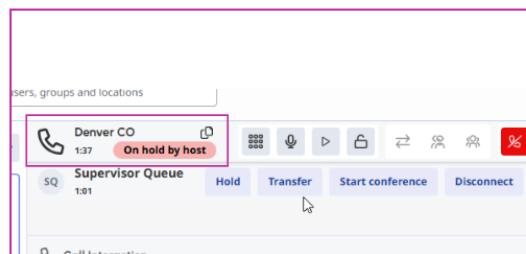
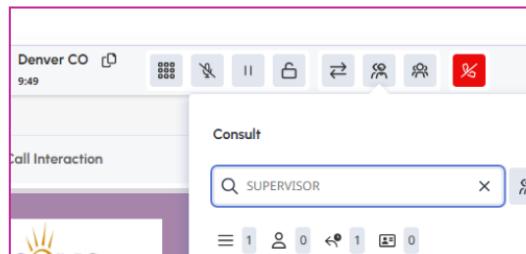
3 Select the search field.

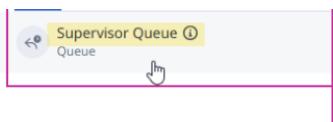
Type the name of the destination.



4 Review the available filter options:

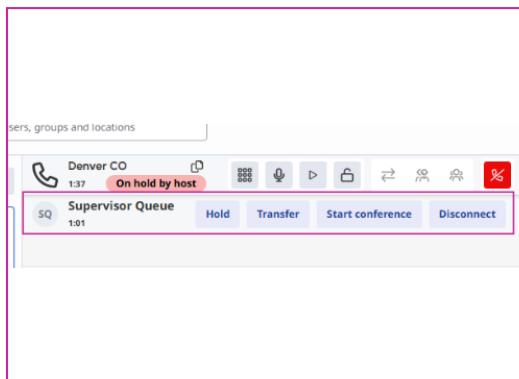
- All
- Users
- Queues
- External Contacts





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.