

HUD & X-Lite Transfer Steps

For these steps you will use HUD (Heads Up Display), also called Fonality (the company that developed this software), and X-Lite.

You can launch those programs by clicking on the following link and running the tool:

[Open X-Lite & HUD](#)

Note: This will ONLY work if they were installed in the default program files directories on your computer.

If you do not have those programs, you can get them here:

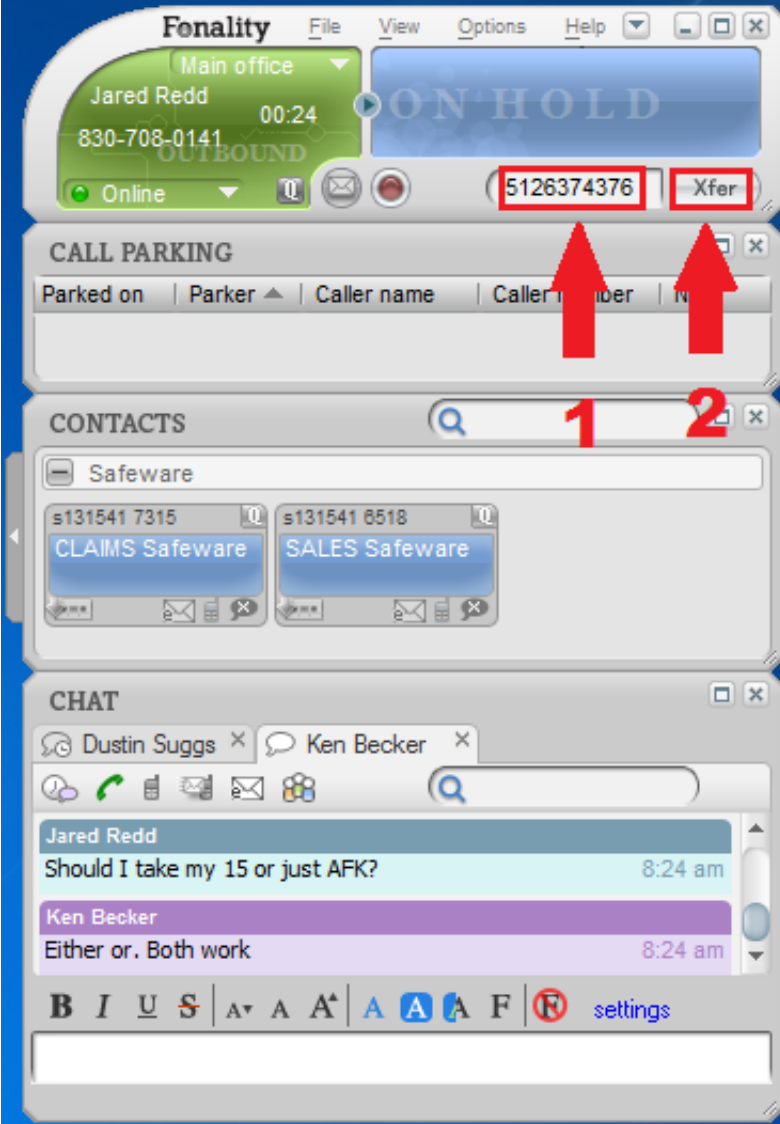
[X-Lite Installer](#)

[HUD Installer](#)

Steps for Cold Transfer

If you need to cold transfer a call (you don't have to enter an extension or relay information to the answering party), you can follow the below process to complete this action.

1. Type the number you need to dial into the "Xfer" box.
2. Press / click the "Xfer" button.

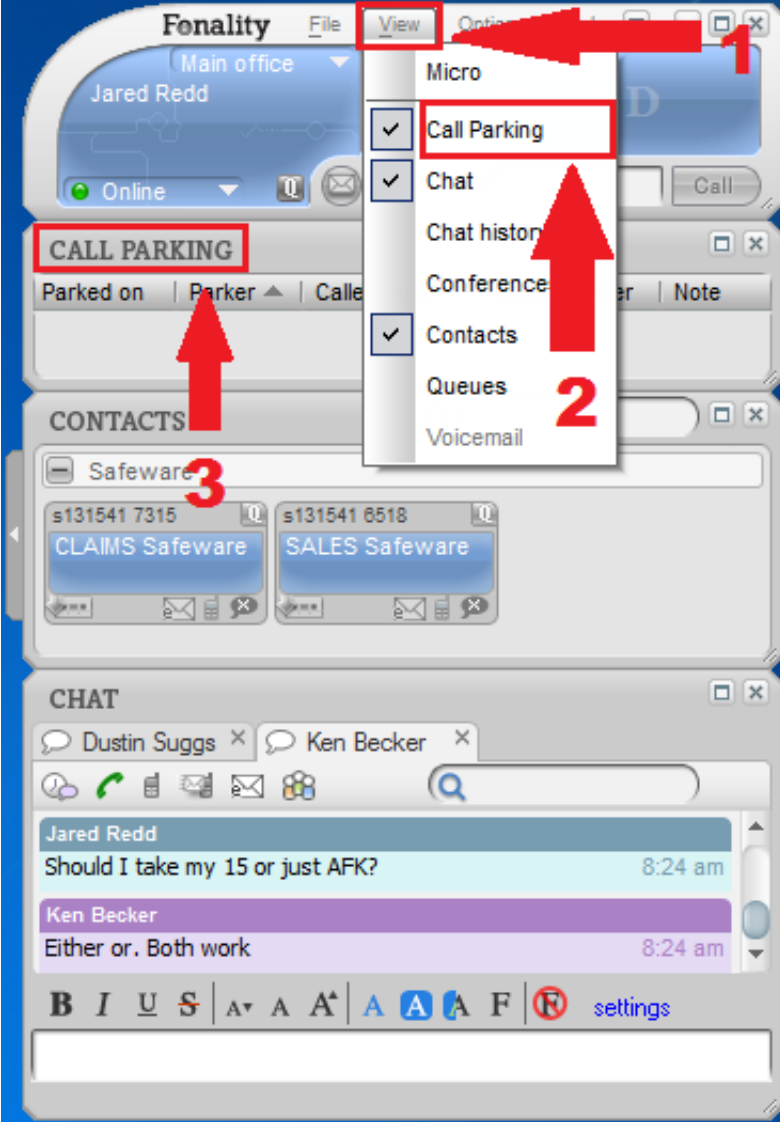


Steps for Warm Transfer

Before you can warm transfer any calls in HUD, you will need to make sure your "Call Parking" window is visible. You do this by selecting following the below steps.

1. Select the "View" menu in HUD.
2. Select "Call Parking" to make sure it is checked / selected.
3. You will now see the "Call Parking" window.

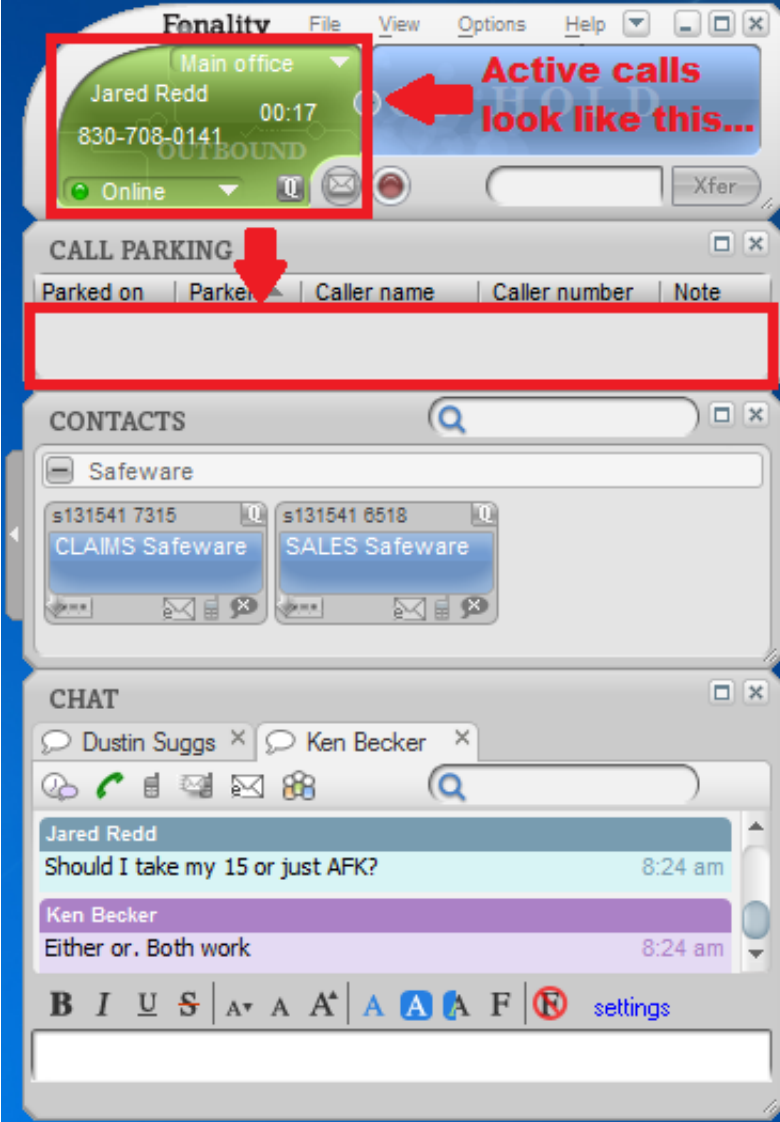
Note: This may or may not be above your other utility windows.



Make sure your X-Lite is in DND (You don't want to get another call from the queue and interrupt this process).



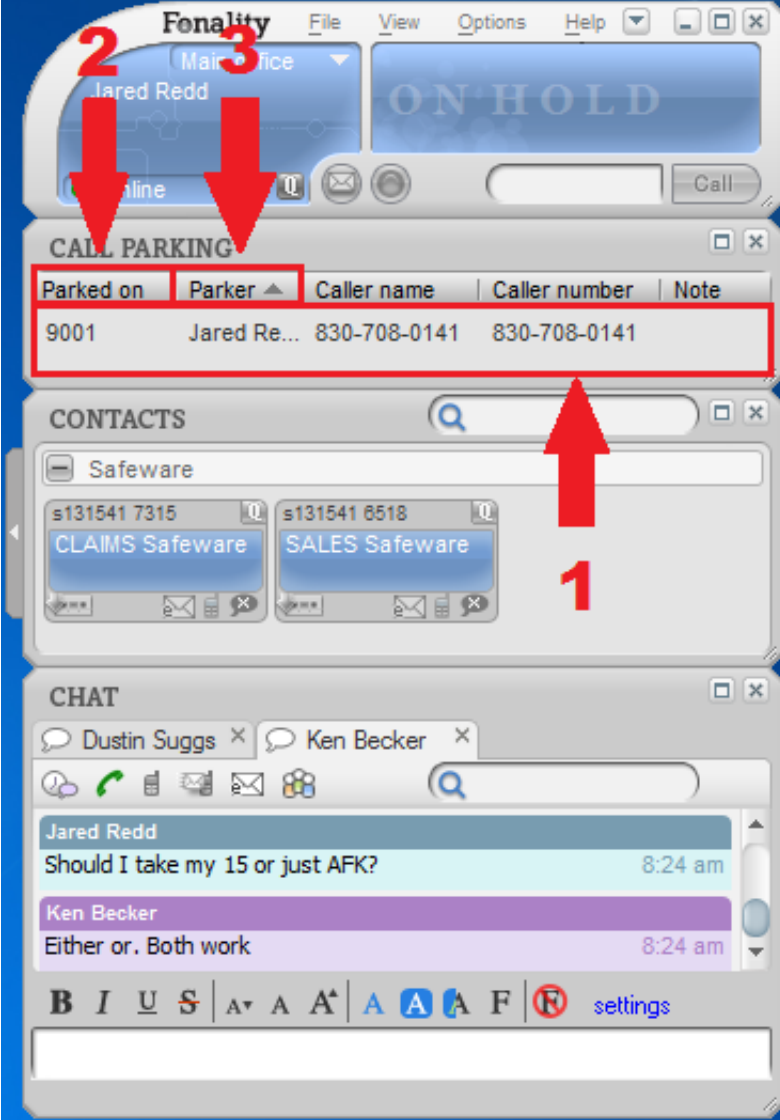
Now, go back to HUD. You want to "Drag n Drop" your active call into the "Call Parking" window.



Note: When you do this, you will no longer be on this call. They will be placed in the "Call Parking" queue and be on hold (music included). For this reason you want to be on DND in X-Lite. You are now active again and able to take calls. If you forgot to put yourself in DND you can do that now, without any harm to this caller.

Note: You will have 10 minutes to complete the transfer process. At the end of 10 minutes, you caller will bounce back to you. If you are still on DND, their call will simply drop, it will NOT go back to the queue. If for any reason you need to get this caller back, you will need to be off DND for that as well.

1. When your caller is in the "Call Parking" queue, they will show in the "Call Parking" window and they will have an extension.
2. This extension is under the "Parked on" category. You WILL need this to complete the transfer process.
3. The person that put them on hold is known as the "Parker" in this case.



Now, back to X-Lite for the next step in this process.

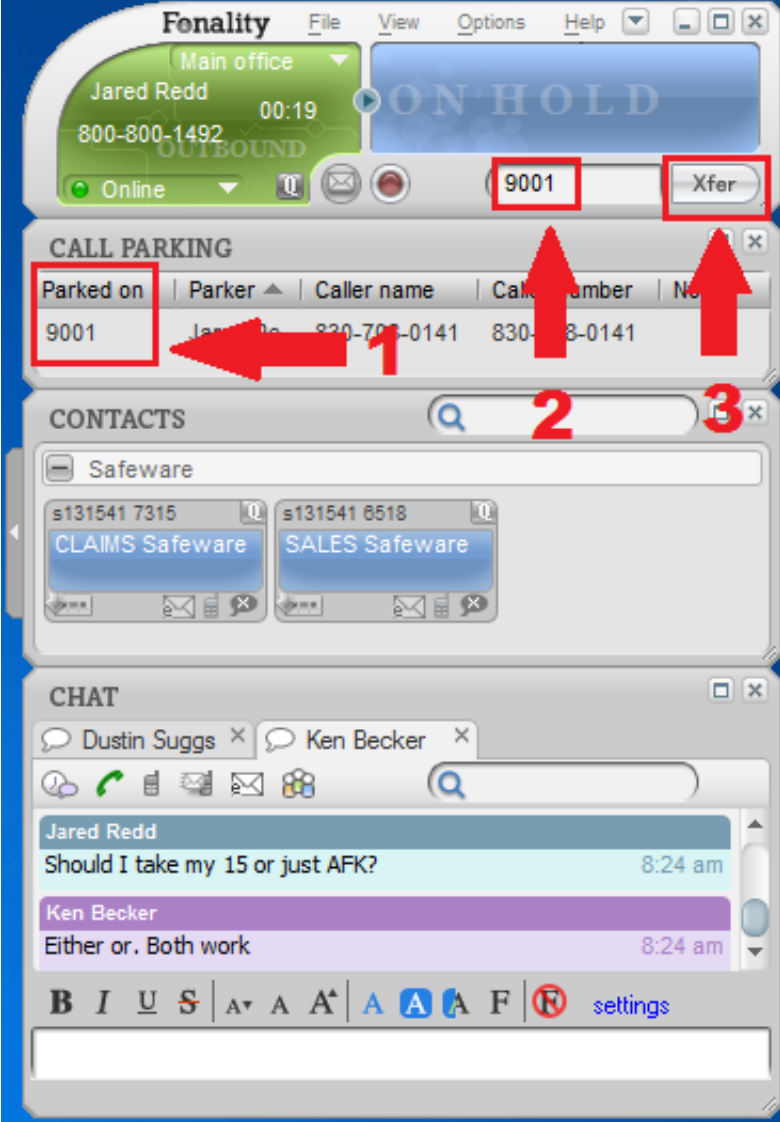
1. Dial the number of the party you wish to reach.
2. Press the "Call" button.
Note: If there is an extension, you will enter that when prompted.



Now, the last step of the process is done in HUD, so go back there again please.

1. When you are ready to transfer your caller, enter / type their extension (the "Parked on" number)
2. into the "Xfer" box
3. and then hit "Xfer".

Note: Sorry, you can not drag n drop or double click on this step. You must type the number in manually and hit "Xfer". Sometimes, there are no shortcuts in life.



That's it! You are now complete with your transfer and the caller is on their merry way. You can now take yourself off of DND and get back to taking those calls out of queue!