

SimboVara Workflow Customization: Set the Front Desk Transfer Number - Admin Panel

Purpose

Allow callers to reach your front desk when transfer is requested or when escalation is needed.

Behavior

- If this number is set, Copilot can transfer calls to your front desk during **office hours**.
- If this number is not set, Copilot will not transfer and will inform the caller that staff is busy during hours or that the office is closed after hours.

Steps

1. Open **Workflow Customizations**.
2. Enter the **Front Desk Transfer Phone Number** in E.164 or local format.
 - Example entry: (617) 334-2617
3. Click **Save**.

When transfers happen

- When a caller explicitly asks to speak with the front desk.
- When your workflow text includes instructions like “If the caller is upset, transfer to front desk.”

Tips and Good practices

- Use a hunt group or queue number, not a direct extension.
- Test transfers from an outside line during open hours.
- Review office hours so transfers are allowed at the right times.

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