

5.2 How to Host a Conference

Bright Pattern Documentation

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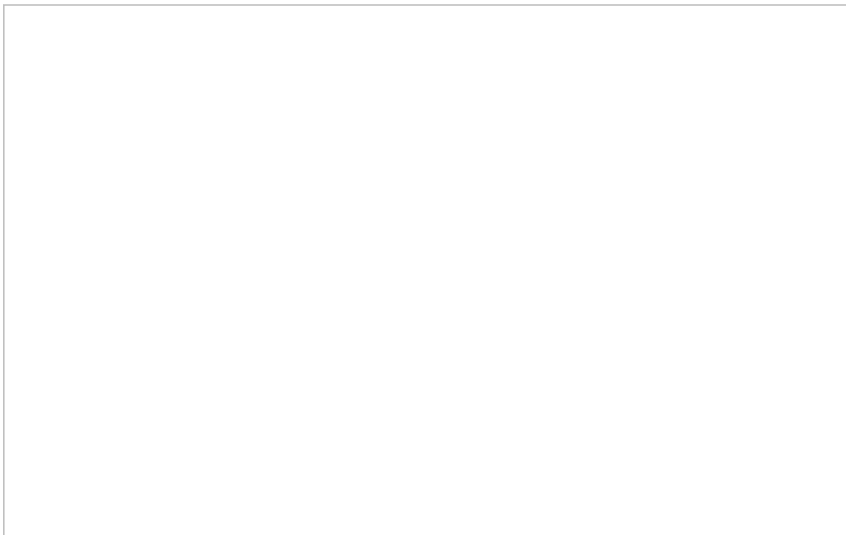
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How to Make a Consultation Call

A consultation call is a call you make with respect to another active call on your desktop.

Follow these steps to make a consultation call:

1. Place your primary call on hold first. See [How to Hold and Retrieve a Call](#) for more information.
2. Make a call to the consultation party. See [How to Make an Internal Call](#) or [How to Make an Outbound Call](#) for more information.
3. The *Active Communications List* will display both calls, the primary call with the hold icon , and the consultation call with the outgoing call icon .
4. If the consultation party is an agent or a supervisor, you can send the content of the *Context Information Area* related to the primary call by clicking the **Send Screen** button.
5. After finishing the consultation, click the **End Call** button to release the consultation call. (You can instead transfer your primary call to, or conference it with, the consultation party. See [How to Transfer a Call](#) and [How to Host a Conference](#) for more information.)
6. Retrieve the active call. See [How to Hold and Retrieve a Call](#) for more information.



Primary and consultation call in the Active Communications List

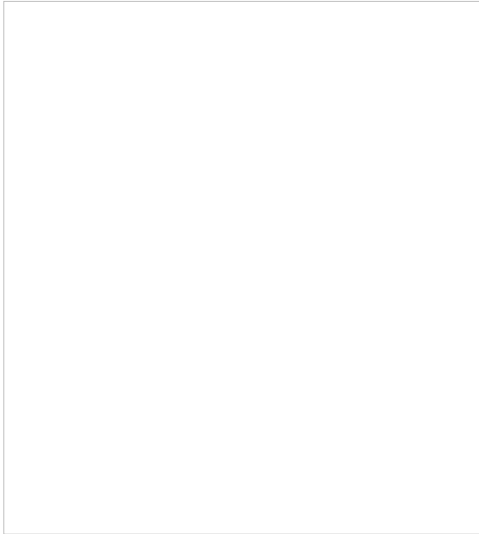
Note: You can also alternate between the primary and consultation calls by retrieving them in turn. (Clicking the **Retrieve** button will automatically put the current active call on hold).

How to Use the Directory

You can make calls to the users and contacts registered in your contact center directory by selecting them from the *Directory* tab. The directory will typically provide contacts of users in your organization grouped by teams. It may also contain external contacts. For internal contacts, the directory also provides information about their current availability to communicate.

To view directory contacts, click the *Directory* tab. The directory will initially list all teams configured in your contact center. External contacts will also be organized in folders. To see contacts of members of a particular team or folder, click the arrow icon next to its name.

You can also search for a contact by typing the contact name or number in the search field that you see above the list of contacts. As you type, only the matching contacts will remain visible in the directory.



Directory

Display Icons

For each contact, the directory will display the name and phone number. For users, the directory will also display icons indicating their current availability to communicate. The icons have the following meanings.

Available



The user is at the desk and is not on a phone call.

Away



The user is logged in but is likely to be away from the desk at the moment. This status is assigned automatically if no computer activity has been detected for the last 15 minutes. As soon as some activity is detected, the user is automatically switched to status *Available*. This status does not prevent you from attempting to contact the user.

Do Not Disturb



The user has manually set the status indicating the desire not to be contacted at the moment. This status does not prevent you from attempting to contact the user.

On the Phone



The user is currently on a phone call. This status is assigned automatically when the user makes or answers a phone call. This status applies to users busy with phone calls only; status *Available* will be displayed for users who handle interactions of any other media types.

Logged out



The user is currently logged out.

Placing a Call From the Directory

To call a number from the directory, follow these steps.

1. Select the contact you wish to call. The contact's number will appear in the *Number Input Field*.
2. If necessary, select the service as described in section [How to Make an Outbound Call](#).
3. Click the **Initiate call** button.