

## 5.2 How to Participate in a Conference

### Bright Pattern Documentation

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# How to Host a Conference

A conference is a portion of a call where three or more parties can talk to each other simultaneously. You become a conference host when you connect a third participant to your regular two-party call.

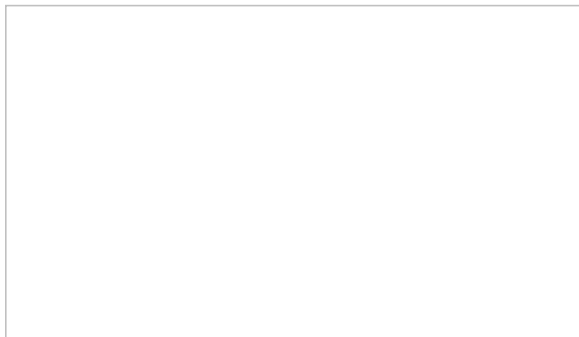
There are two ways to connect a third participant to your two-party call: via a consultation call or single-step conference.

## Connecting Via Consultation Call

To connect a third party via a consultation call, follow these steps:

1. Place your original call on hold and make a consultation call to the desired third party. See [How to Make a Consultation Call](#) for more information.
2. After making sure that the consultation party is willing to participate in the conference, click the **Merge** button . (If you have two or more calls on hold, you will be asked to confirm whether you wish to conference all held calls with the consultation party.) Upon clicking the **Merge** button, all three parties will be able to talk to each other.

**Note:** If you change your mind about conferencing the primary call with the consultation party, then instead of using the **Merge** button, click the **End Call** button to finish the consultation call. Then click the **Retrieve** button to retrieve the primary call from hold and continue the conversation.



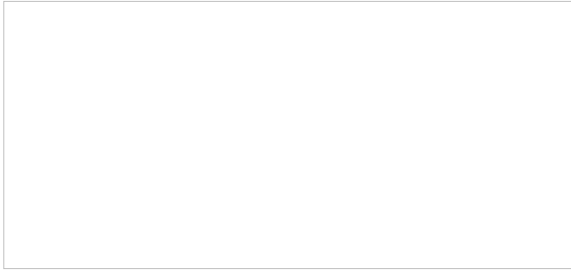
Merge button

## Connecting Via Single-Step Conference

To connect a third party via a single-step conference, follow these steps:

1. Without placing the original call on hold, enter the number of the desired third party in the *Number Input Field* (or select it from [Directory](#), [Recent](#), or [Favorites](#)).
2. Click the drop-down icon next to the **Initiate call** button, and select the **Initiate single-step conference** button .
3. The dialing will begin immediately. Both you and the other party currently on the call will be able to monitor the progress of the dial attempt and engage in a three-party conversation as soon as the third party answers.

**Note:** If you have a call on hold prior to using the **Initiate single-step conference** button, it will not be connected to the dial attempt. Instead, a regular two-way call will be initiated to the desired number, while the original call will remain on hold. This is done to prevent the accidental merging of unrelated calls.



Single-step conference button

You can connect more than one party to your conference following the aforementioned procedures. All conference participants will be displayed in the **Contact Info Panel**.

Note that any other internal party connected to your conference will be able to add more participants to this conference. However, regardless of the number of participants or who connected them, you will continue to be the host of the conference call because you were the one who set up the original three-way conference.

## Disconnecting

As the conference host, you have the following exclusive privileges: you can disconnect any individual participant from your conference at any time, and you can end the conference call for all participants in one step.

To disconnect an individual participant, hover over the participant's name in the **Contact Info Panel**, and click the disconnect icon  that will appear next to the participant's name.

To end the conference call for all participants in one step, click the **End conference** button .

Other participants can leave your conference at any time. You can only leave your own conference when it has three participants. To leave your conference, click the **Leave** button . You will be disconnected while the two remaining parties will carry on with a regular two-way call.

**Note:** When you connect a third party via a single-step conference function, all of the discussed conference controls become available to you as soon as the dialing begins. Thus, for example, you can leave the call without waiting for the third-party to answer.

## 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).

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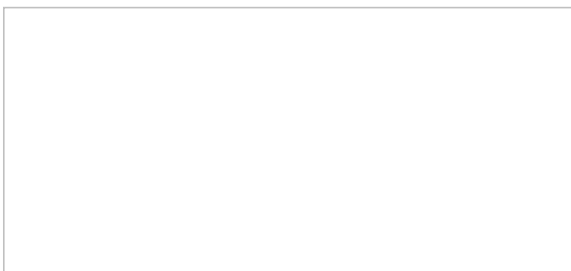
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