

November 2008

*Did you know?*

The ShoreTel system gives you the ability to instantly conference in calls from your phone or Personal Call Manager (PCM) without the need of a third party service. This will allow you to conduct real-time conferencing on the fly.



**Conferencing is allowed when at least one call is active**

Whether you have used it in the past or not, the ability to conference calls is a great feature to have at your disposal. With PCM offering visual confirmation that calls have been connected or disconnected, you are now in complete control. The ability to see and manage multiple conference call attendees, and to add or drop attendees as required is a great benefit. Also, with conference calls originating from the ShoreTel system or attendees calling into your personal DID number, there is no requirement of a third party number and access code. ShoreTel's built-in conferencing capabilities allow you to conference up to 6 people, depending on your system's available ports, to your call at any time.



This display is shown once you click the Conference icon and allows you to invite other participants

### To Start a Conference Call (via PCM)

1. Call your first participant using PCM.
2. Then click the "Conference" icon in the toolbar to bring up the phone directory.
3. Enter the name or phone number of the person that you want to join the conference. Highlight their name and press "Conference" (shown above).
4. When the second participant picks up, all conversation will be joined together.
5. You may also turn an active call into a conference call by following steps 2 through 4 above.



### To Start a Conference Call (via ShoreTel phone)

1. Call your first participant.
2. Then press the "Conference" button on the phone.
3. Enter the phone number of the person that you want to join the conference. Or, utilize the Directory button to add an internal participant
4. When the second participant picks up, all conversation will be joined together.
5. You may also turn an active call into a conference call by following steps 2 through 4 above.



Instead of automatically placing someone in your Conference call you can consult with them first

### To Consult Before You Conference (via PCM)

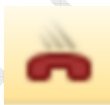
1. Call your first participant using PCM.
2. Then click the "Conference" icon in the toolbar to bring up the phone directory.
3. Enter the name or phone number of the person that you want to join the conference. Highlight their name and press "Consult" (shown above).
4. You will then be placed in a private call with the party.
5. If the consulted party agrees to join the call, click "Yes" to conference them into the call. If the consulted party does not agree, just click "No, Thanks" or "Cancel" (depending on version) to return to the original caller

### To Consult Before You Conference (via ShoreTel phone)

1. Call your first participant.
2. Then press the "Conference" button to bring up the phone directory.
3. Enter the phone number of the person that you want to join the conference and press "Consult" (the second soft key to the left).
4. You will then be placed in a private call with the party.
5. If the consulted party agrees to join the call, press the "Yes" softkey to conference them into the call. If the consulted party does not agree, press the "Cancel" softkey to return to the original caller.

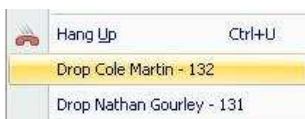
### To Remove a party from Conference Call (via PCM)

#### Recommended Option #1:



1. Highlight the caller you wish to remove.
2. Then press the highlighted HangUp button (red phone icon).

#### Recommended Option #2:



1. Right click the call cell.
2. You can now select the participant you wish to Drop.

## To Remove a party from Conference Call (via ShoreTel phone)

1. Press the "Show" softkey to see a list of participants on your display
2. Use the rocker key next to the display to highlight the party you wish to drop
3. Press the "Drop" softkey to disconnect the caller

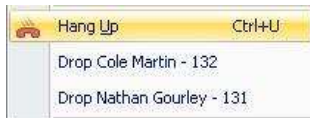
## To Drop the entire Conference Call (via PCM)

### Recommended Option #1:

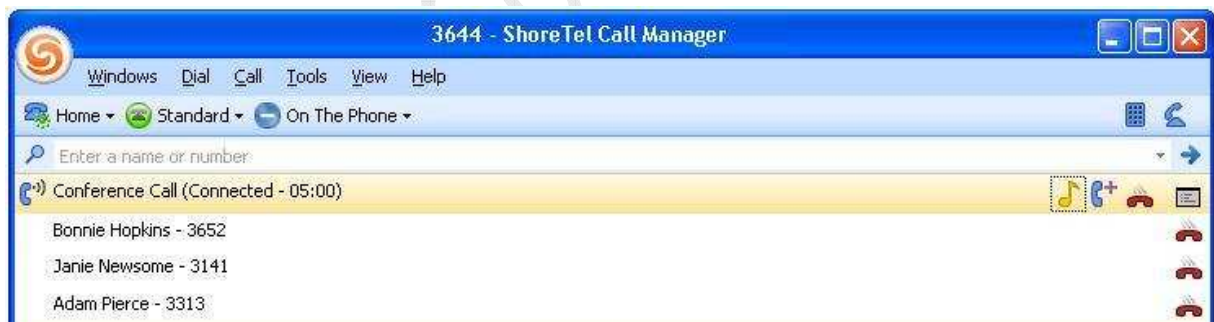


1. Press the HangUp button (red phone icon) under the Conference Call cell.

### Recommended Option #2:



1. Right click the call cell.
2. You can now select Hang Up.



Here is an example of what a Conference Call will resemble when using PCM

For assistance with this feature, please see your system administrator.



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