# Elevate® Desktop and Mobile Application Get Started Guide

# Elevate® Quick Start Guide

New to Elevate? Read this guide to learn the basics.

**Messaging**
Communicate in real-time 1:1 or in teams using private and public channels

**Meetings**
View upcoming meetings, connect with teams and customers in HD video with screen sharing, annotation and more

**Files**
Access, share, and manage files in real-time

**Call History**
See a record of all inbound and outbound calls

**Voicemails**
Manage and view voicemail transcriptions

**Calling**
Access company directory at-a-glance, manage and place calls

**Presence**
View co-worker availability in real-time

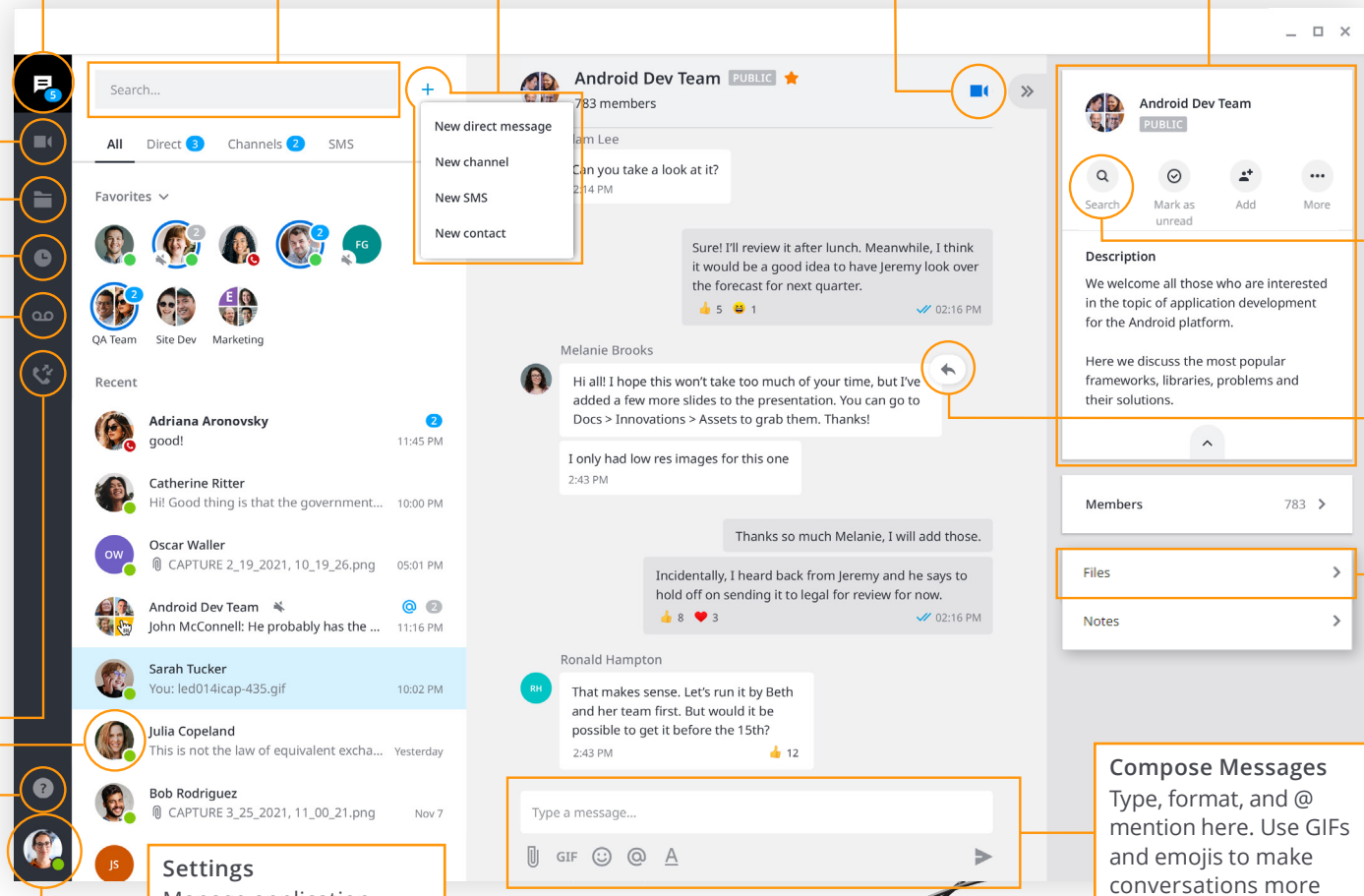
**Help**
Access more information on app features, information on product updates, and answers to common questions.

**Search**
Search for people in your organization

**New Message**
Select type of message to send via 1:1, group chat, SMS, or create a contact

**Meet Now**
Start a meeting, share your screen, and more

**Manage Channels**
Add members, search, favorite and more




**Chat Search**
Search chat threads for relevant messages

**Replies**
Respond to a specific conversation

**Files**
Locate, preview and download files that have been shared in a chat

**Compose Messages**
Type, format, and @ mention here. Use GIFs and emojis to make conversations more engaging

**Settings**
Manage application settings, notifications, access integrations, and more

# Installation

Elevate makes it easier than ever for you to work from wherever. For the best experience, utilize Chrome or download the desktop and mobile applications.

Use Chrome — OR — Download Desktop App

Scan the QR code or download from the iOS or Android Store.

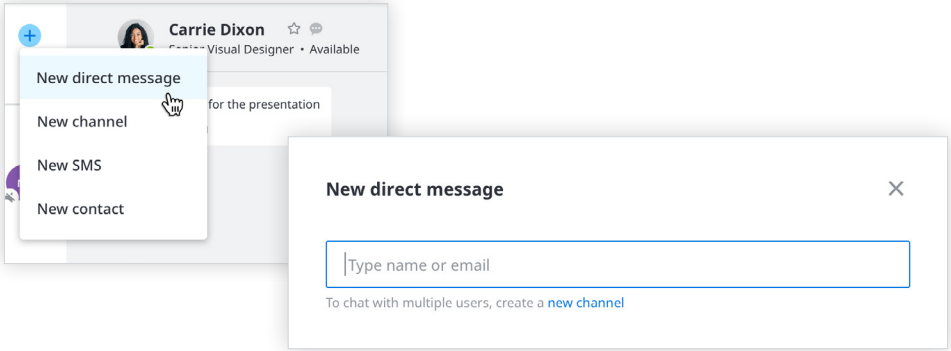
# Sign In

Log in to the desktop and mobile applications using your work email address and Elevate password.

# Messaging

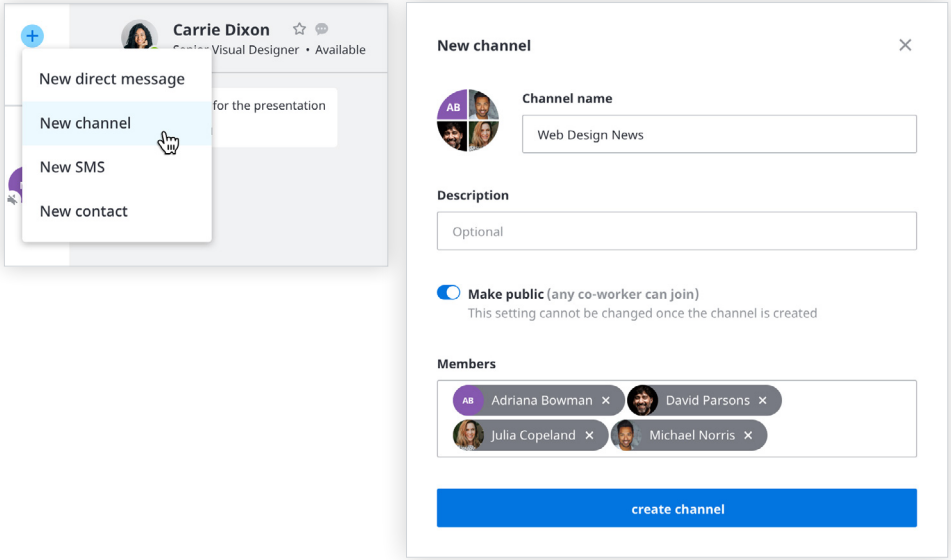
## Start a chat

Connect with co-workers in real-time. Select + to **...create a new direct message.** A direct message is a chat with a single person. Type the name or email of the individual, write your message, select ➢



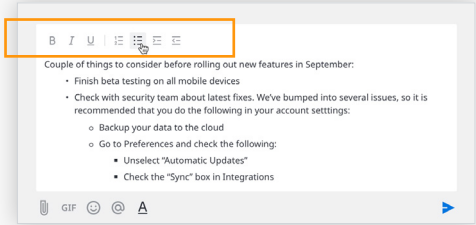

## Create a new channel:

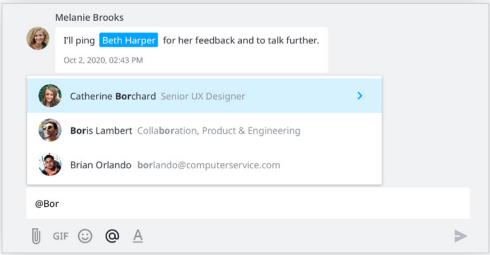
A channel is a group discussion—this can be dedicated to a department, specific project, etc. Type in Channel name, add a description, choose if you want the channel to be public or private, and add members.




## Create a new SMS

Select + to create a new SMS message. An SMS is a text message sent to a mobile phone number. Type in the 10 digit mobile number or search contacts and click "start conversation"



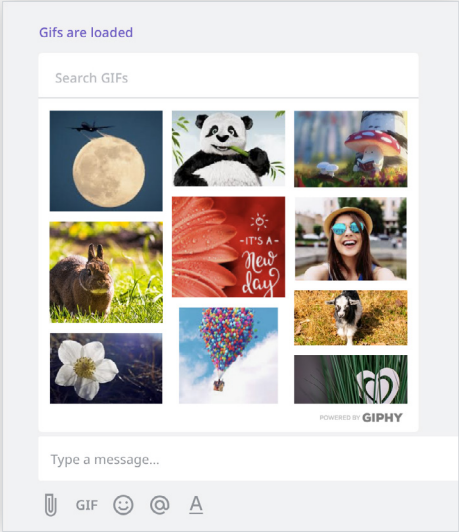




## Use @ mentions

To get someone's attention in a channel, select @, then type their name or select them from a list that appears. You can @ mention multiple people at once.

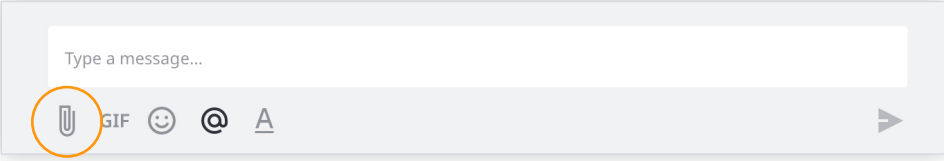
## Add emojis and GIFs to chat

Have fun with co-workers by adding emojis and GIFs to chats. Select the ☺ for emojis or GIF to add a GIF.

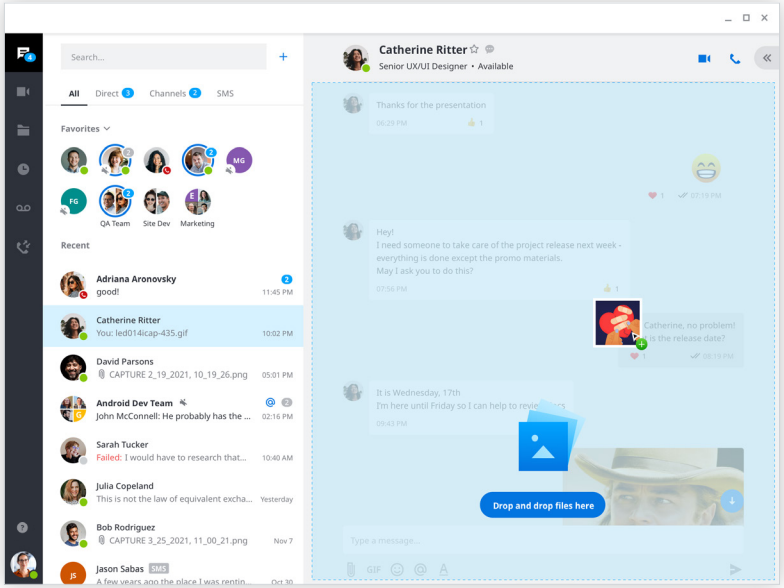


# Messaging

**Easily share files to collaborate with colleagues in real-time.**
From a direct chat or channel, select to upload an attachment into your message

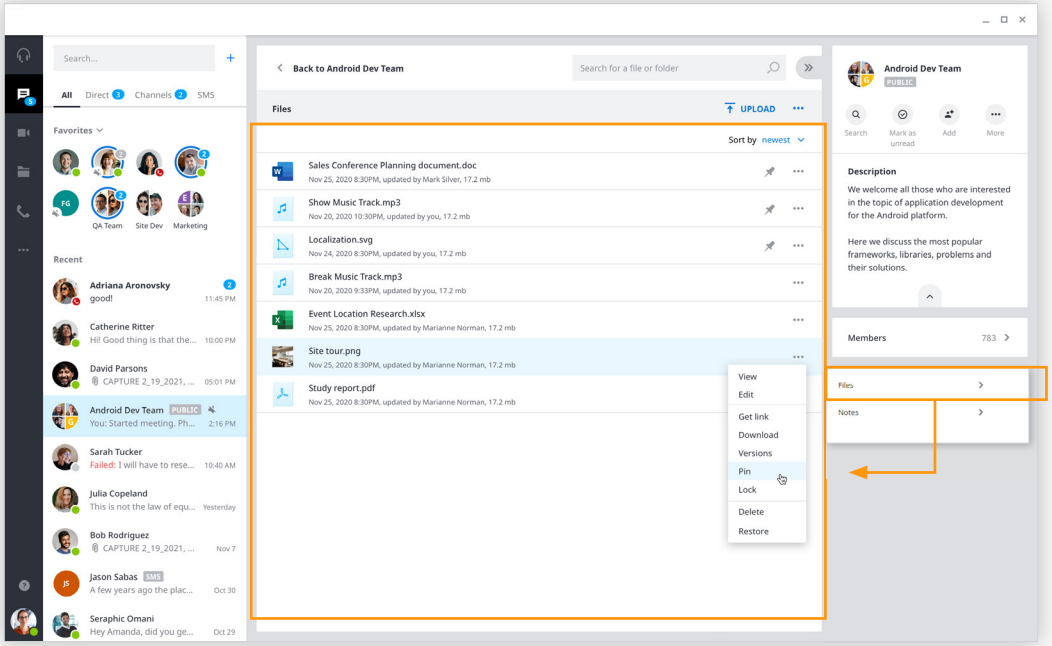



Drag and drop documents from your desktop directly into any message.




## Filter files

Use the Files filter to locate, preview and download files that have been shared in a chat.



# Meetings

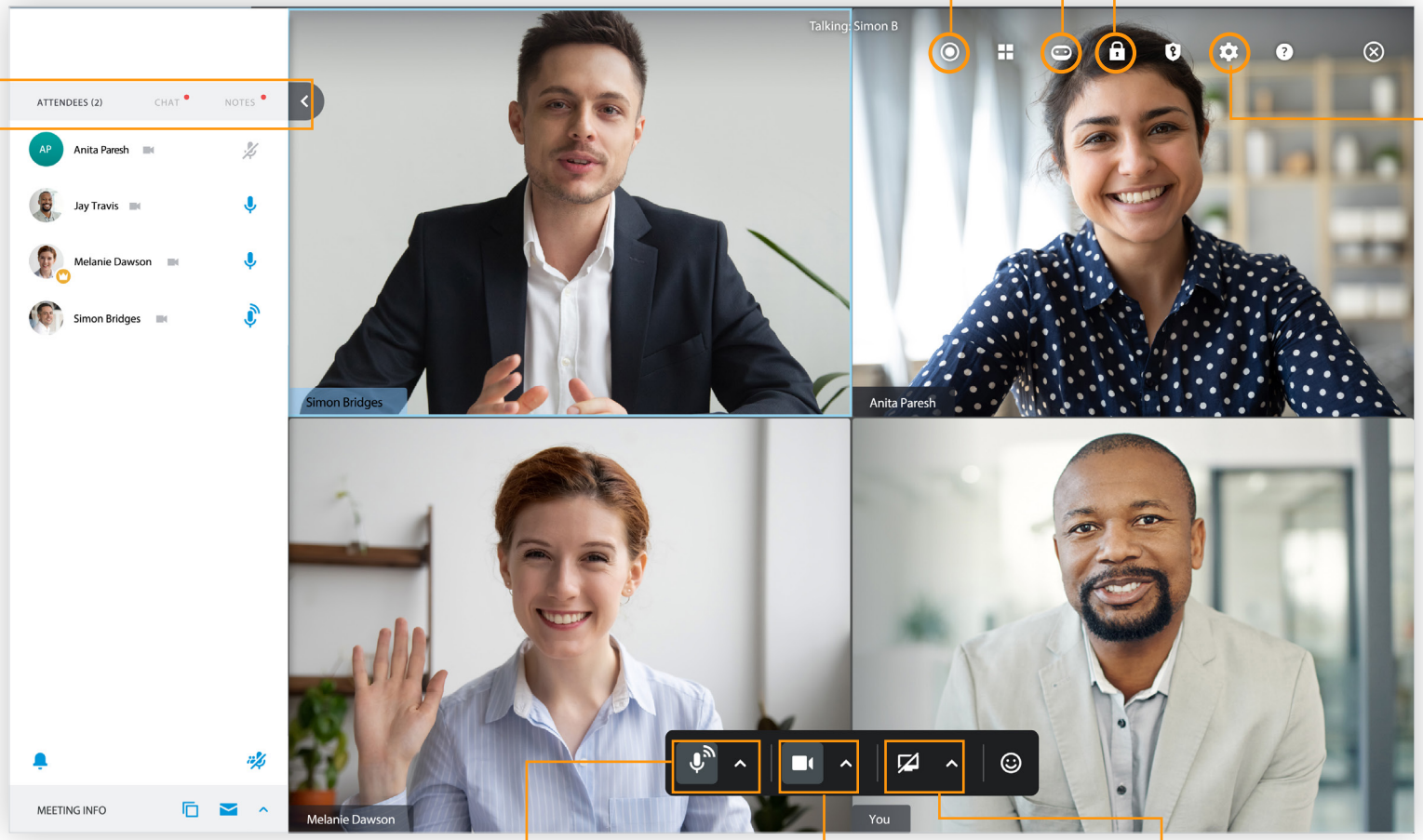
Meet face-to-face in HD video with anyone, from anywhere.

**Panel:** View attendees, chat, take notes and more

**Record:** Record meetings and play them back anytime.

**Virtual Assistant:** Transcribe meeting audio and email the results to the host.

**Lock/Unlock:** Lock down your meeting with an extra-layer of security.




**Settings:** Access advanced security features virtual backgrounds, and more.

Use a headset and a high-quality camera for the best experience!

**Audio:** Mute and access extended audio settings.

**Webcam:** Share your webcam to connect in HD video.

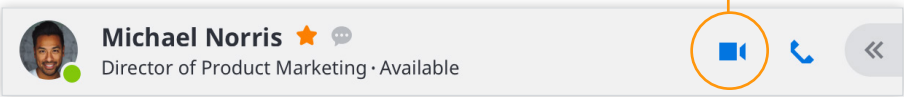
**Screen share:** Share content and use screen annotation to collaborate in real-time.

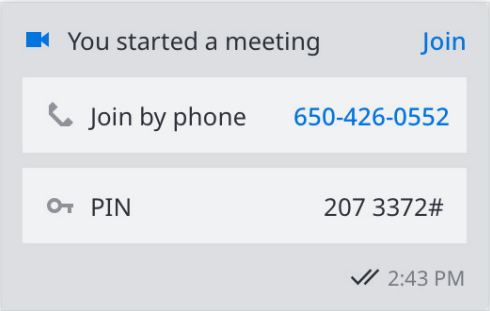
# Meetings

Meet face-to-face in HD video with anyone, from anywhere.

## Start a Meeting

From a direct conversation or channel, select



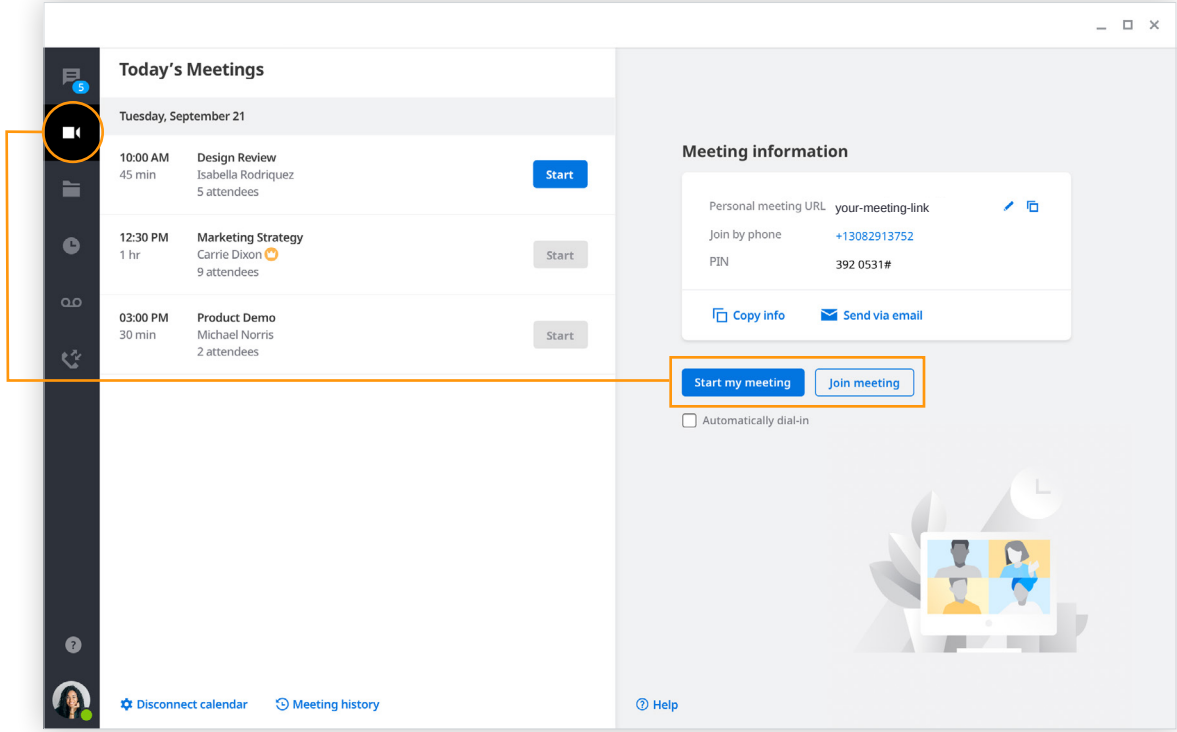

**Integrate your Outlook or Google calendar so you can easily start and schedule meetings directly from your work calendar.**

Your administrator will need to enable this. Learn more here

Download the Elevate Chrome Extension to start and schedule meetings from your Google calendar, and click-to-call from your Chrome browser.

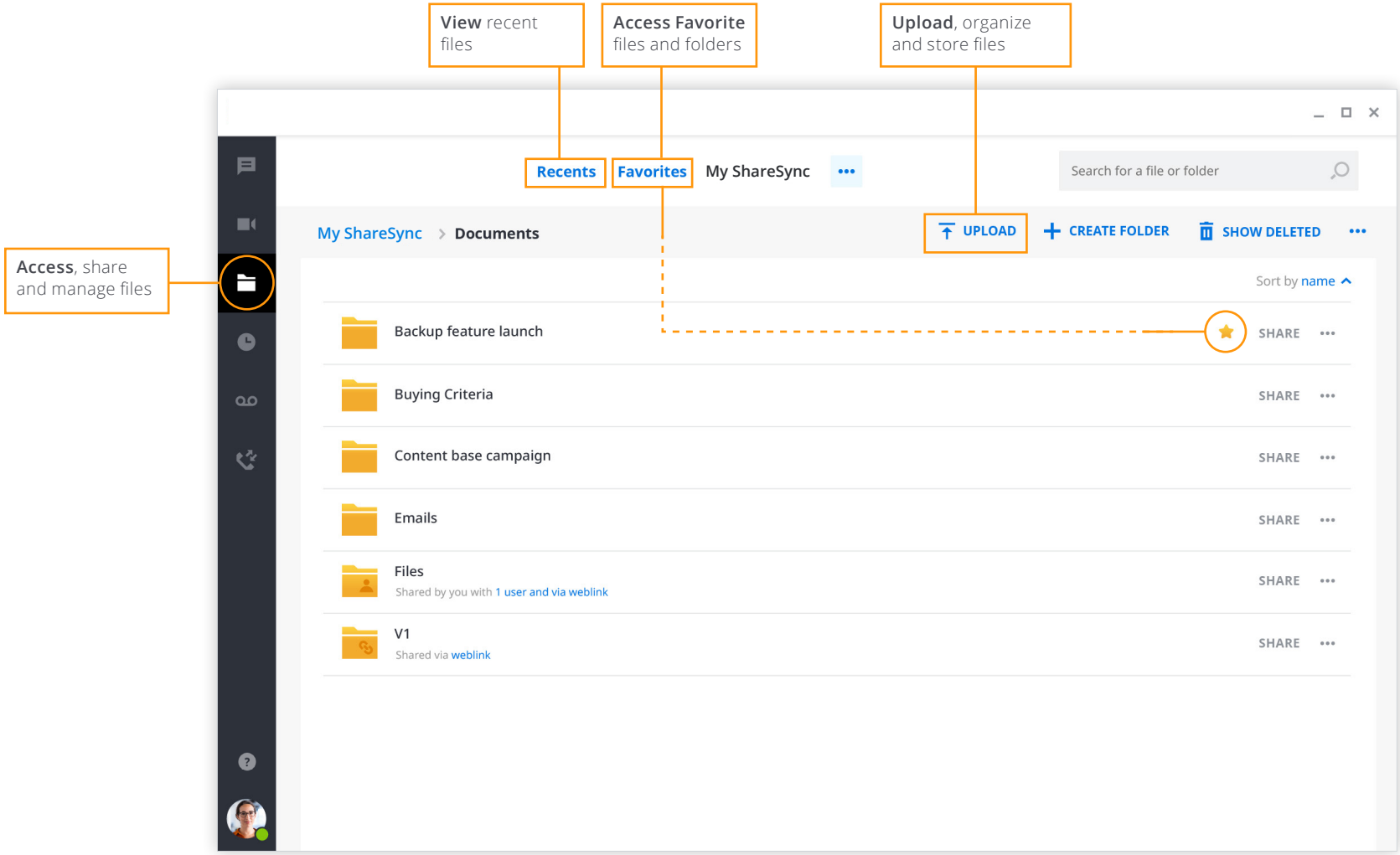
## From the meeting tab, you can:

Select "Start my meeting" or join a meeting



# Files

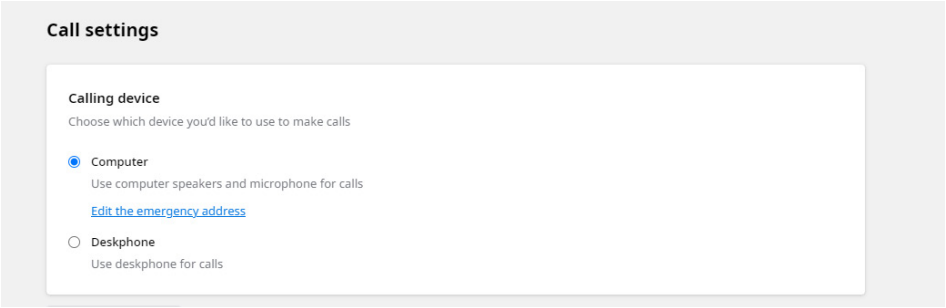
For a better collaboration experience, use ShareSync to access, manage, store and share files safely and securely with anyone inside or outside your organization.



# Calling

## Place, receive and manage calls in two ways:

- **Computer:** Use computer speakers and microphone for calls (can use Bluetooth headset or headphones)
- **Deskphone:** Use hardware (desk phone) for calls

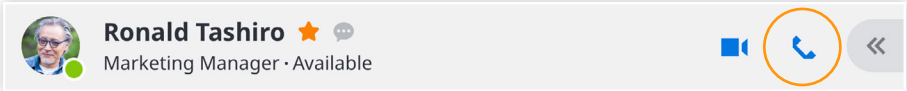


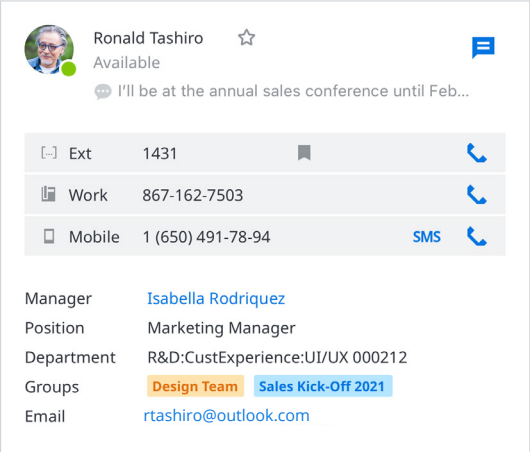

## Calling features vary based on calling mode.

| FEATURE/ APP MODE | PLACE A CALL | RECEIVE A CALL | 3-WAY CALLING | MUTE/ UNMUTE | HOLD | DTMF | CALL FLIP | CALL PARK | TRANSFER | END CALL |
|---|---|---|---|---|---|---|---|---|---|---|
| Computer | ● | ● | ● | ● | ● | ● | ● | ● | ● | ● |
| Desk-phone | ● | Desk Phone | | Desk Phone | Desk Phone | Desk Phone | ● | ● | ● | ● |

## Place calls from chat

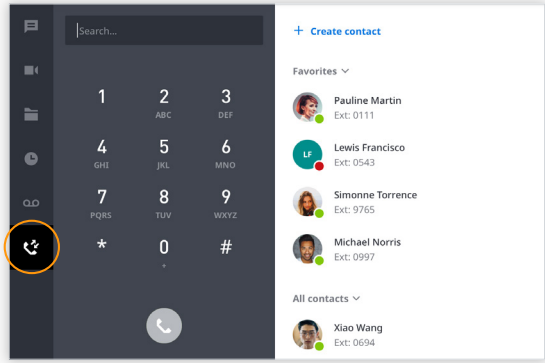
Select to call someone from a 1:1 chat or from a contact card

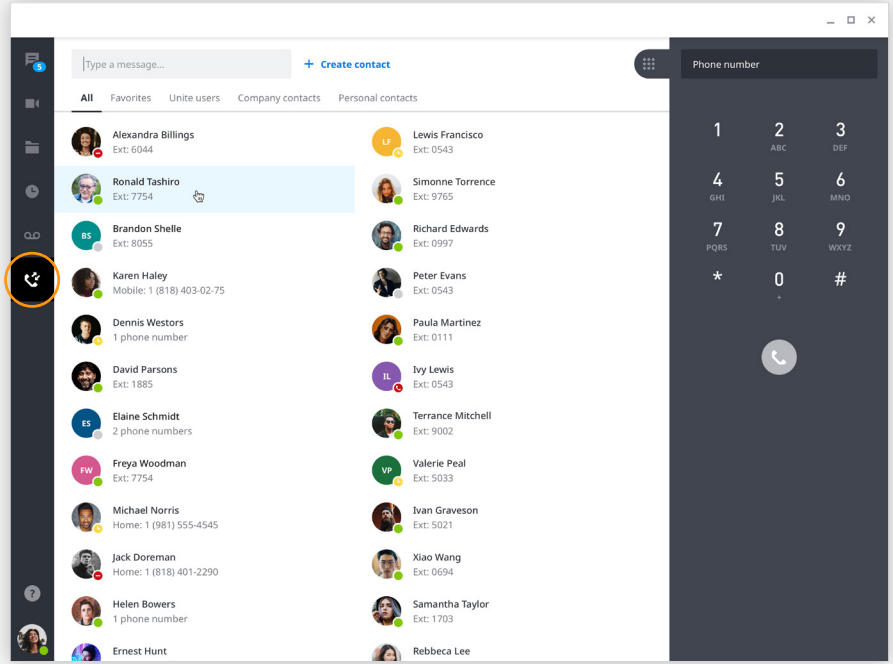



## Place calls and view contacts

Place calls to internal and external contacts, search and view company contacts at-a-glance, and switch between pre-defined filters to manage calls.



# Mobile App

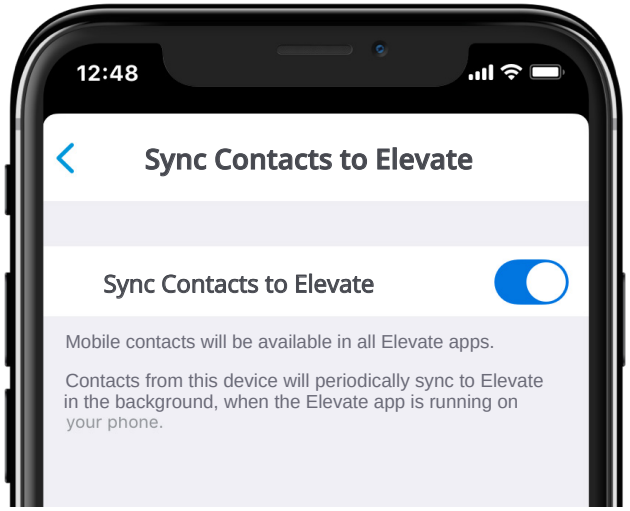
## Take your work with you, wherever you go

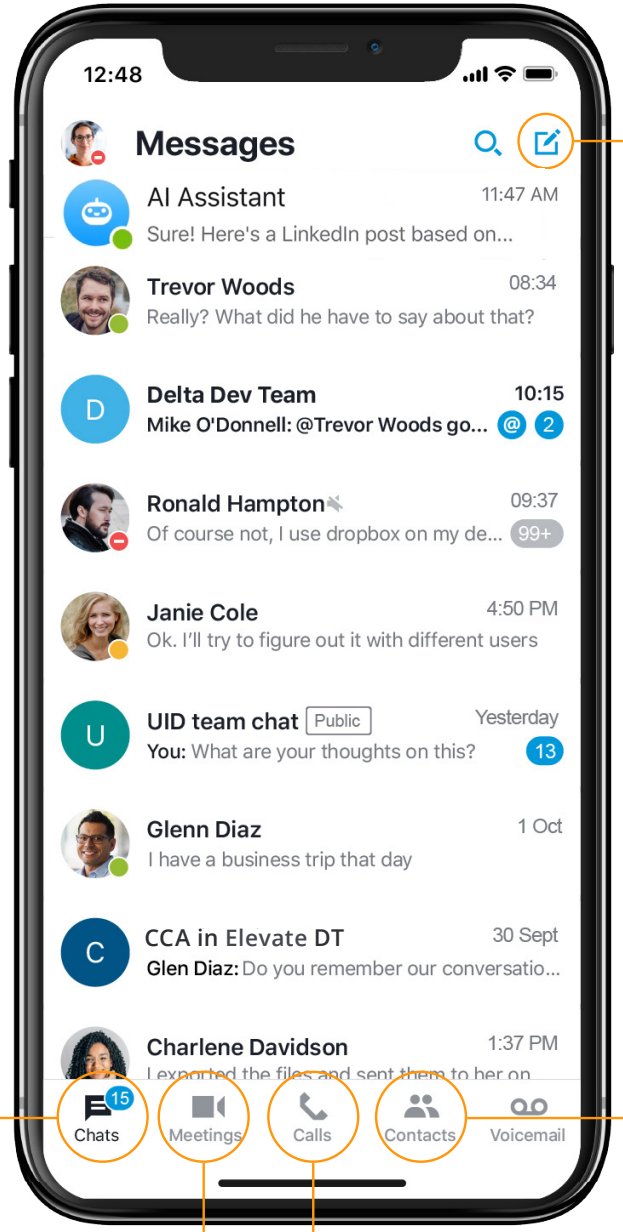
Call, chat, meet and collaborate from your mobile device with the Elevate mobile application.

All messages sync across desktop and mobile apps!

## Contact sync

Sync contacts from your personal device to your Elevate desktop and mobile applications.




**Start new messages**
Create a new direct, channel or SMS message*

**Messaging**
Communicate in real-time with Direct and Channel messaging

**Contacts**
View all company and personal contacts

**Meetings**
Host and join meetings**

**Calls**
Use your business phone number to place, receive and manage calls

*Business SMS must be enabled by admin. Business SMS is only available in North America.

# Meetings Using the Mobile App

Host and join meetings from wherever you go. Your meeting schedule and information sync across mobile and desktop applications allowing you to collaborate from anywhere

Use the webcam icon to turn your camera on or off.

Use the microphone icon to mute and unmute.

Use the people icon to view meeting attendees.

Extended settings; screen share, record meeting, lock meeting, virtual background and additional settings for audio and visual display.

Use these icons to access live chat and notes.

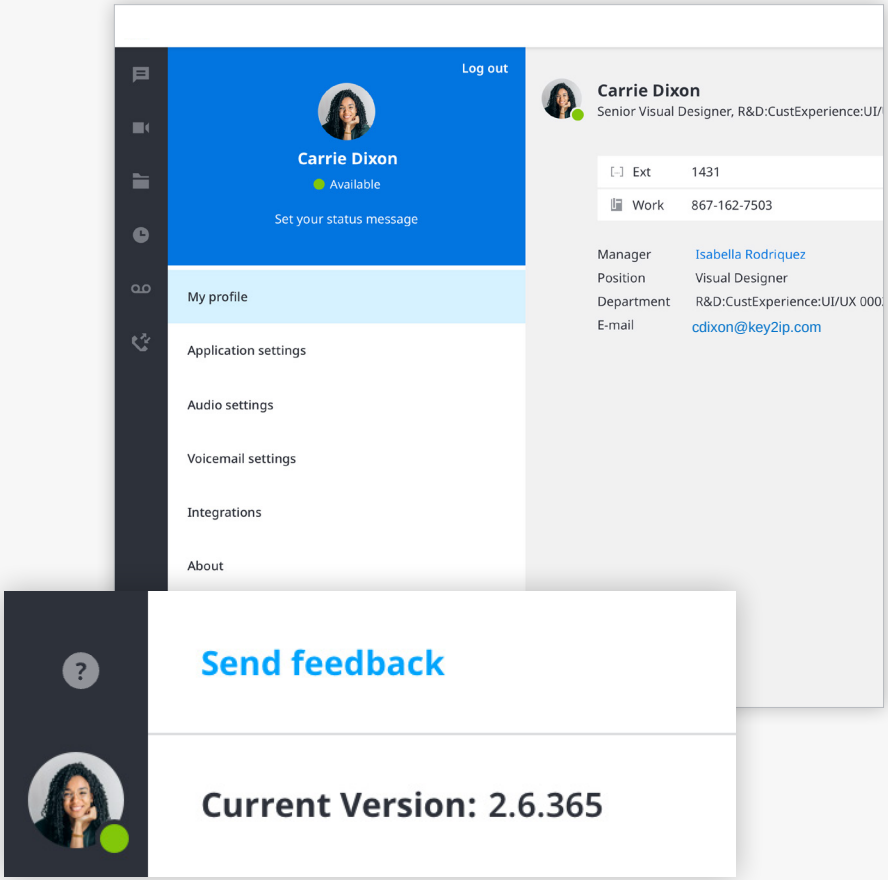
# Next Steps

**Want to learn more?**
Join our weekly live training session:

**ELEVATE APPS**
TRAINING

REGISTER TODAY!

**Send us your feedback:**
Are you enjoying Elevate?
Is there room for improvement? Let us know!




QUESTIONS? CONTACT US TODAY!

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