

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

Voice mails

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

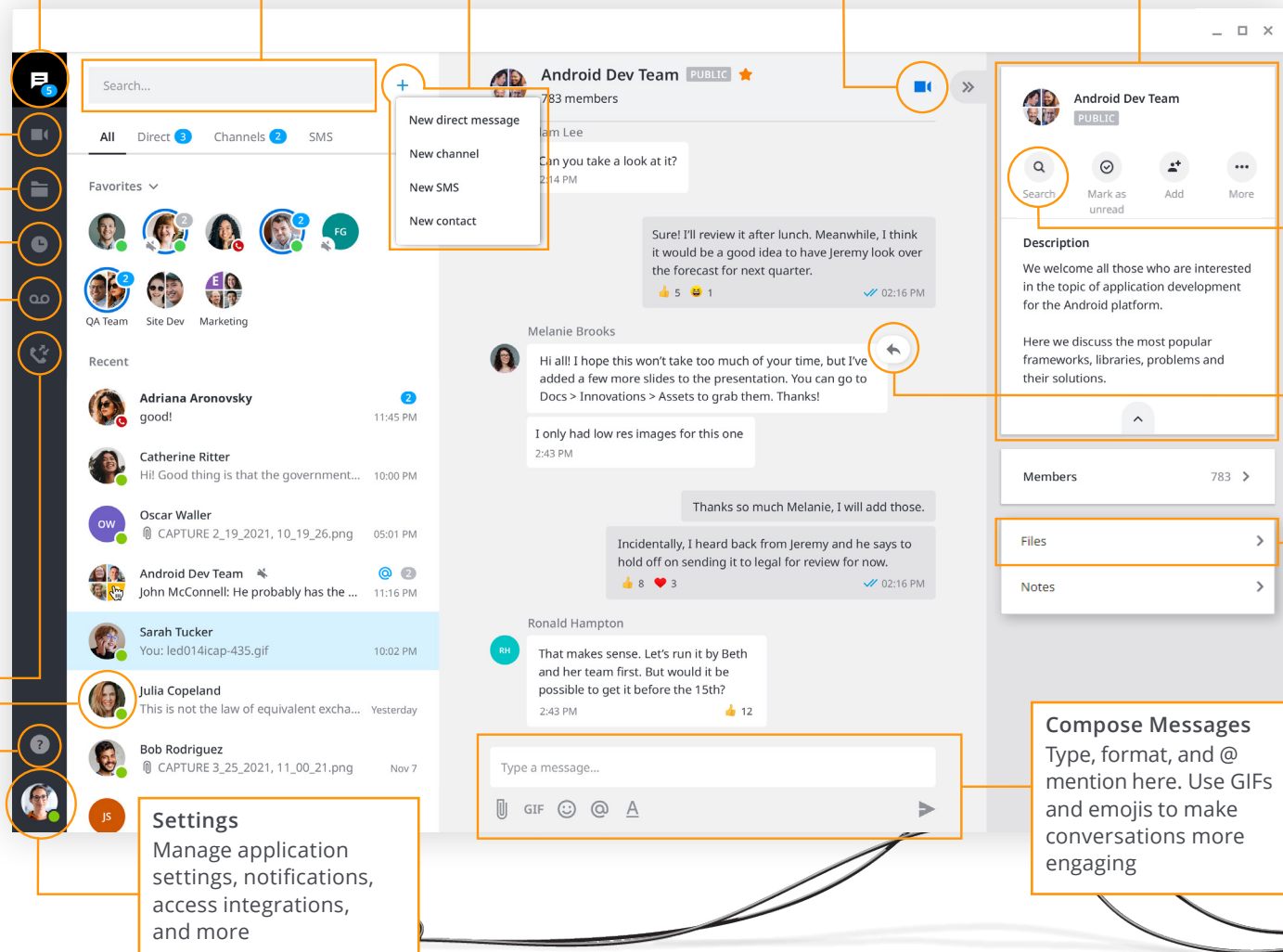
Locate, preview and download files that have been shared in a chat

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

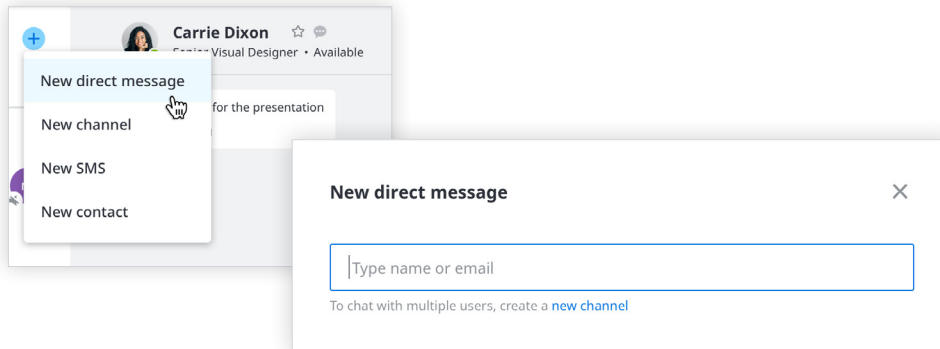
Log in to the desktop and mobile applications using your work email address and Elevate password.



Messaging

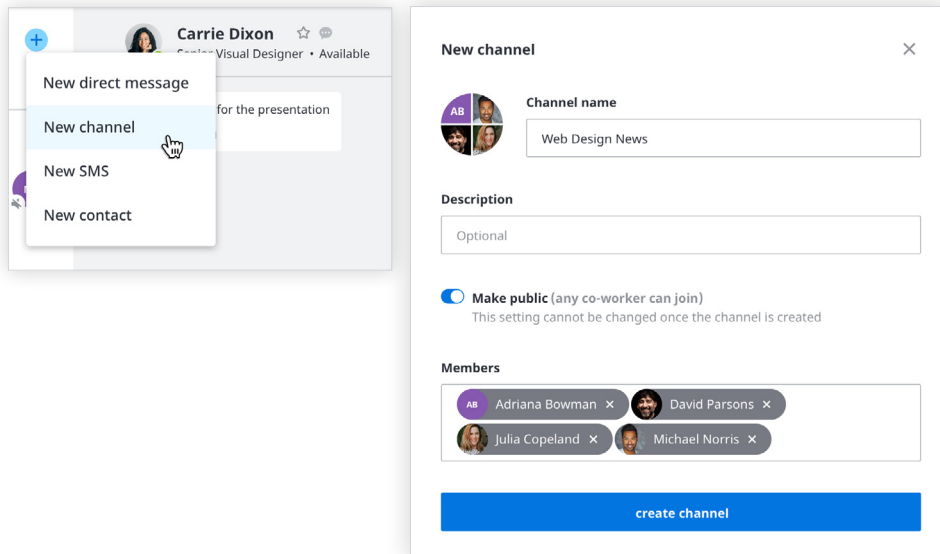
Start a chat

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 **▶**



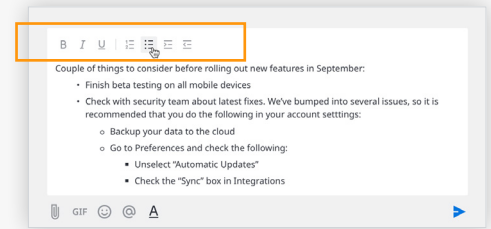
Create a new channel:

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.



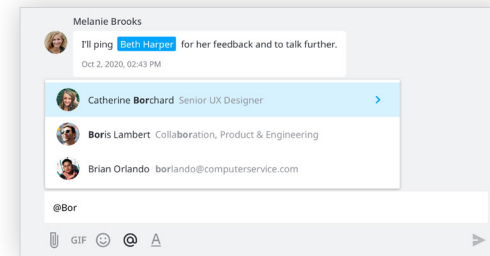
Create a new SMS

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"



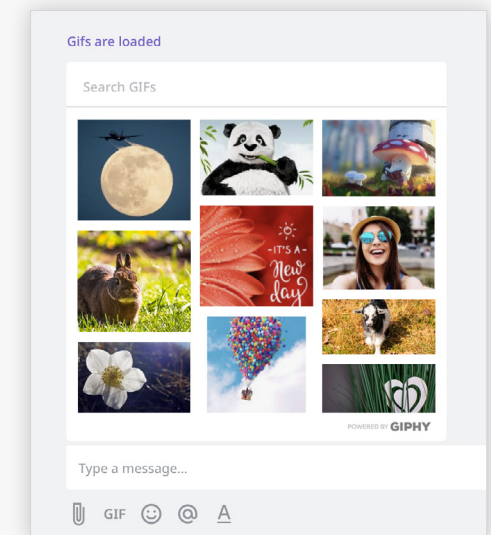
Use @ mentions

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

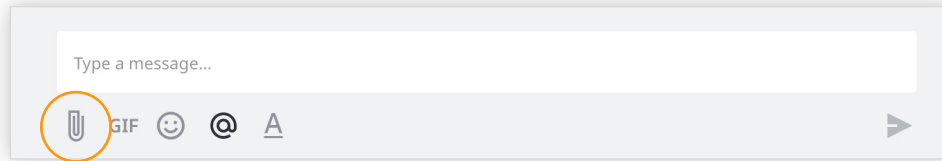
Have fun with co-workers by adding emojis and GIFs to chats. Select the **😊** for emojis or GIF to add a GIF.



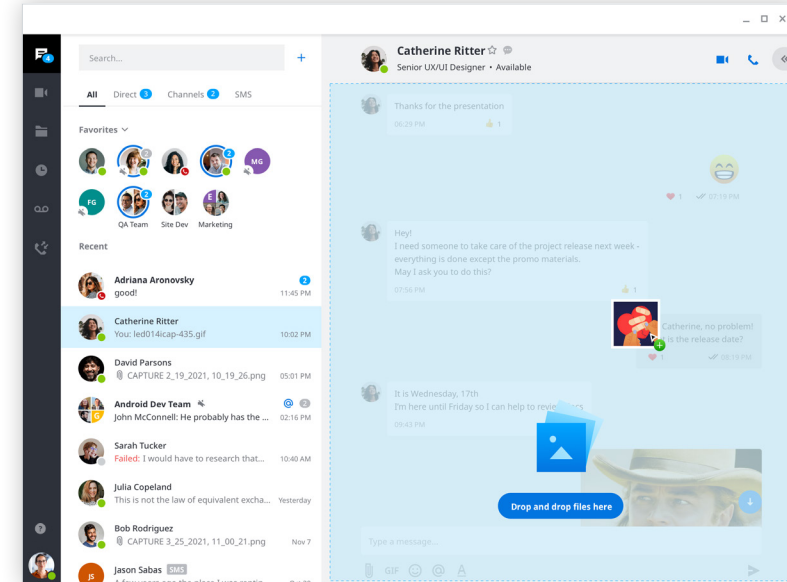
Messaging

Easily share files to collaborate with colleagues in real-time.

From a direct chat or channel, select  to upload an attachment into your message

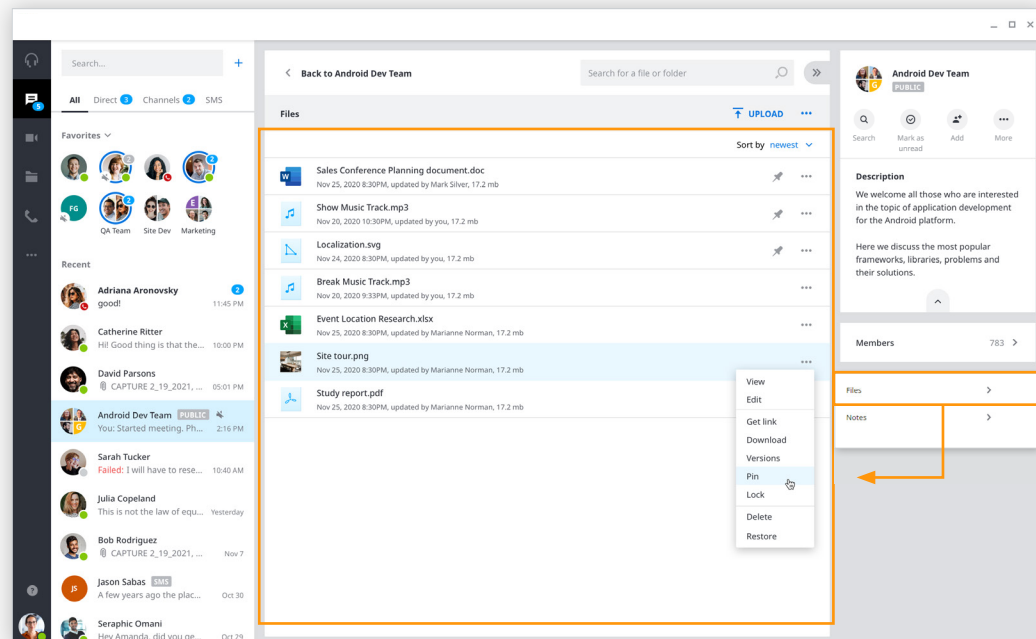


Drag and drop documents from your desktop directly into any message.



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.

The image shows a Zoom meeting interface with four participants in a grid view. On the left is a sidebar with an attendees list. At the top of the main window are several control icons. At the bottom is a toolbar with icons for audio, video, chat, and reactions. Orange callout boxes with lines pointing to specific icons provide detailed descriptions of these features.

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.

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.

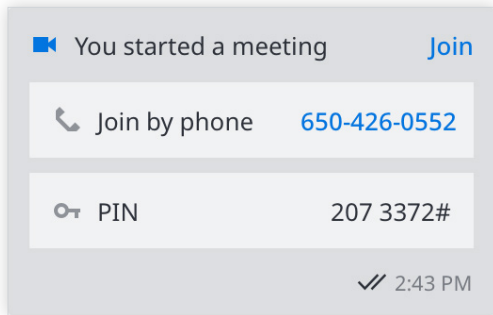
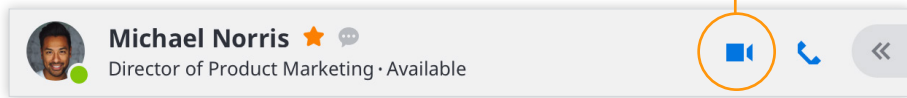
Use a headset and a high-quality camera for the best experience!

Meetings

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

Start a Meeting

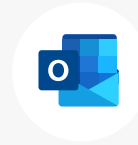
From a direct conversation or channel, select



From the meeting tab, you can:

Select "Start my meeting"
or join a meeting

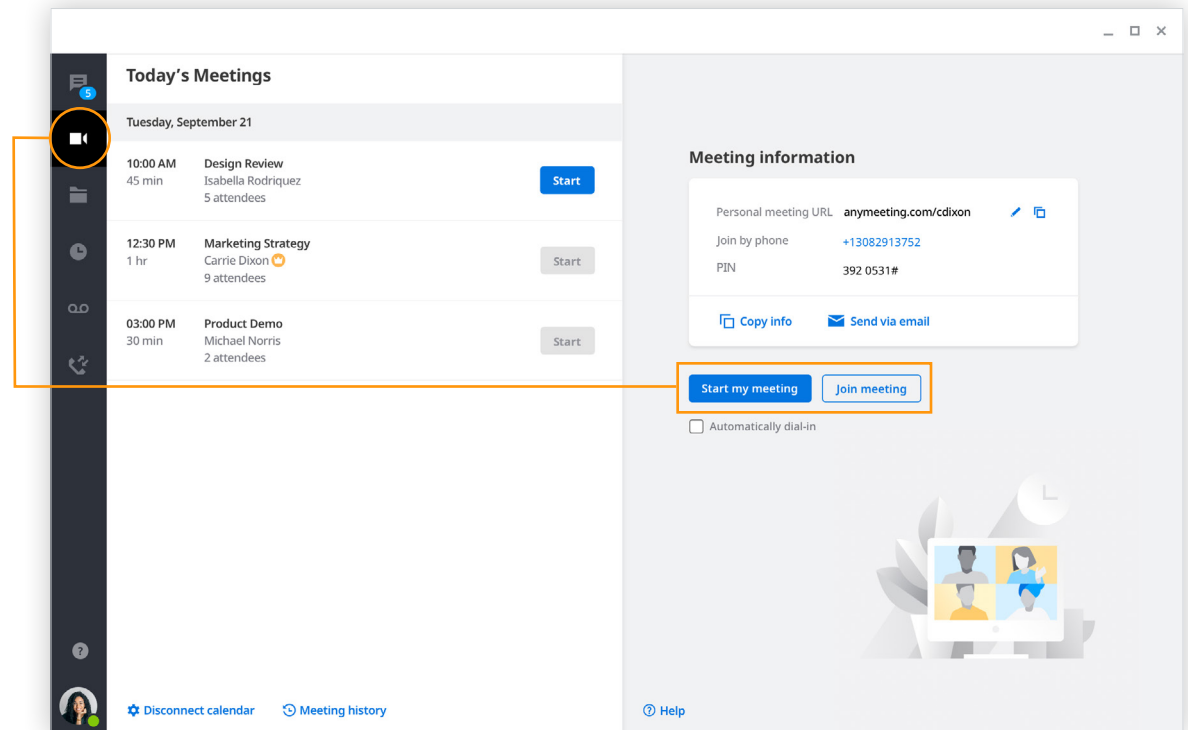
Integrate your Outlook or Google calendar so you can easily start and schedule meetings directly from your work calendar.



Your administrator will need to enable this. [Learn more here](#)

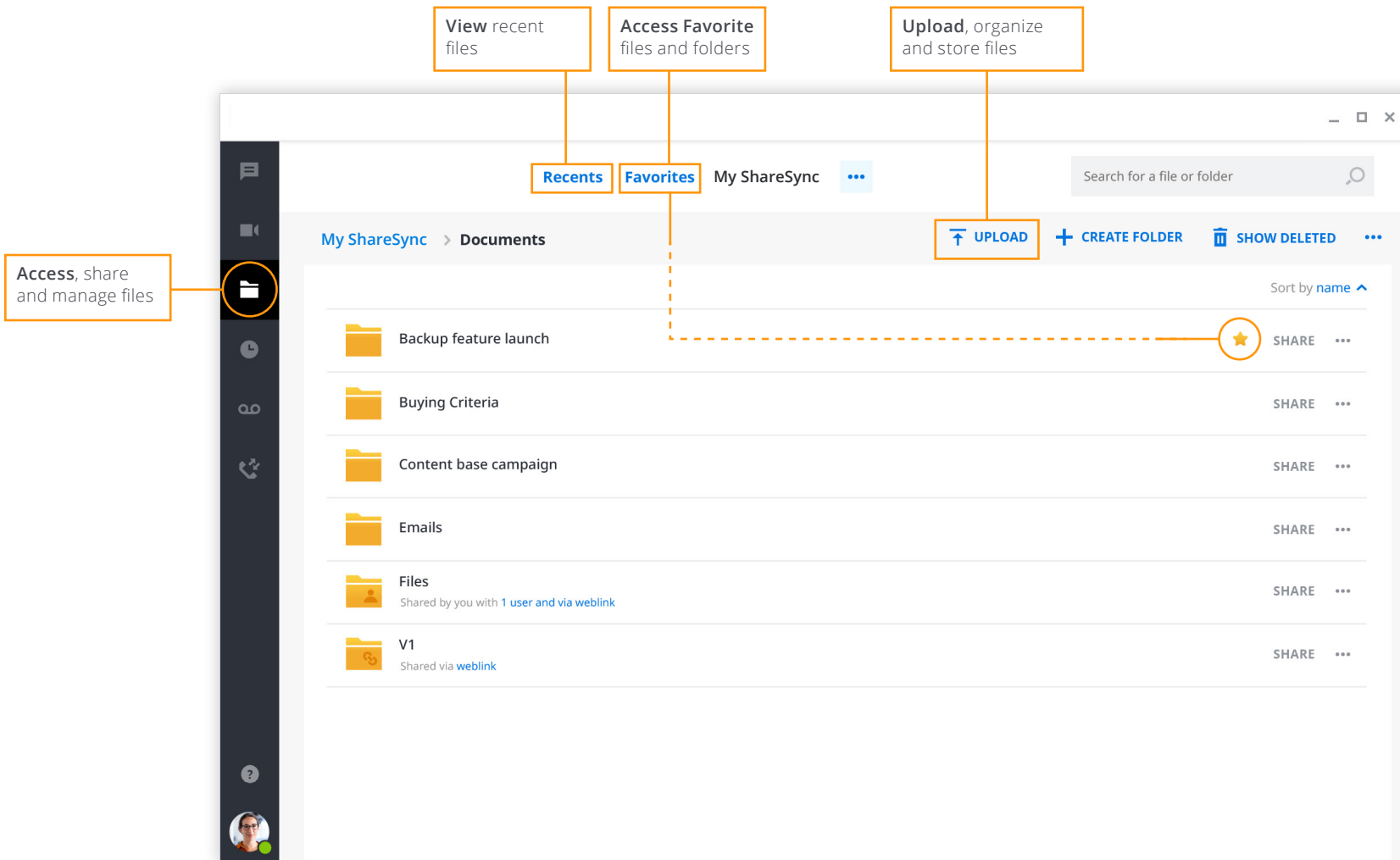


Download the [Elevate Chrome Extension](#) to start and schedule meetings from your Google calendar, and click-to-call from your Chrome browser.



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

Call settings

Calling device

Choose which device you'd like to use to make calls

Computer
Use computer speakers and microphone for calls
[Edit the emergency address](#)

Deskphone
Use deskphone 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 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.

Place calls from chat

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

Mobile App

Take your work with you, wherever you go

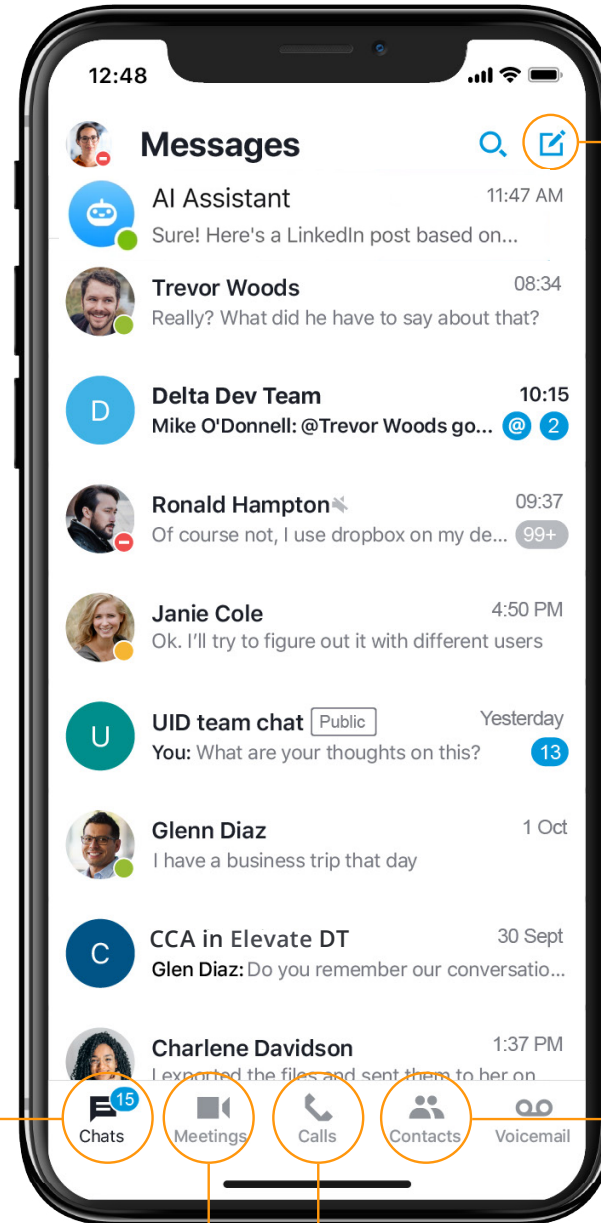
Call, chat, meet and collaborate from your mobile device with the Elevate mobile application.



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.

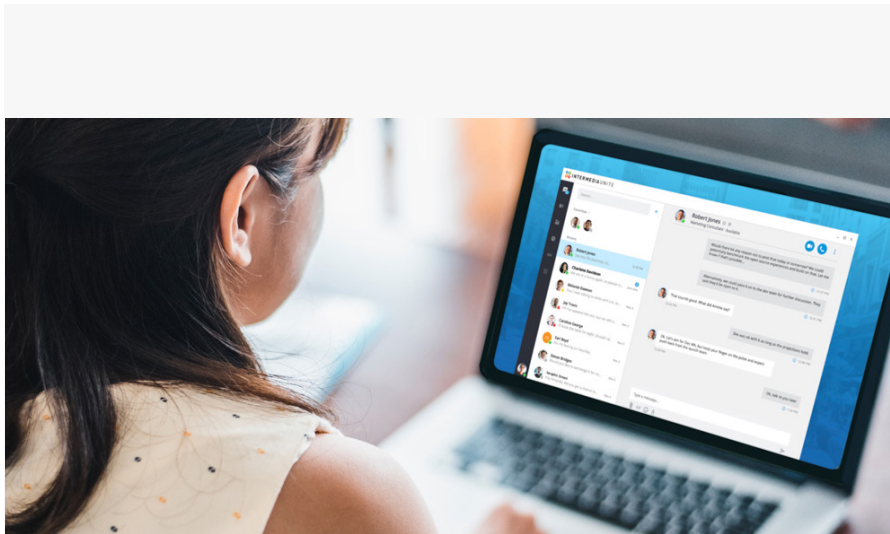
Extended settings; screen share, record meeting, lock meeting, virtual background and additional settings for audio and visual display.

Use these icons to access live chat and notes.

Next Steps

Want to learn more?

Join our weekly live training session:



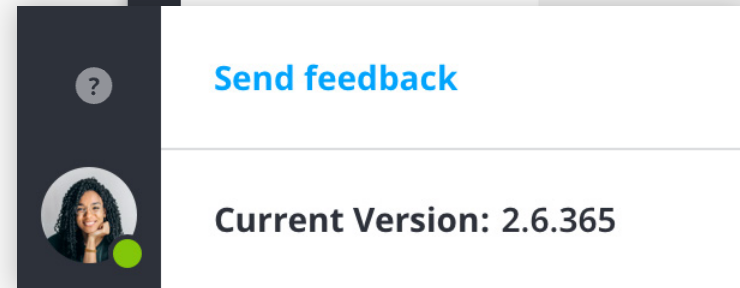
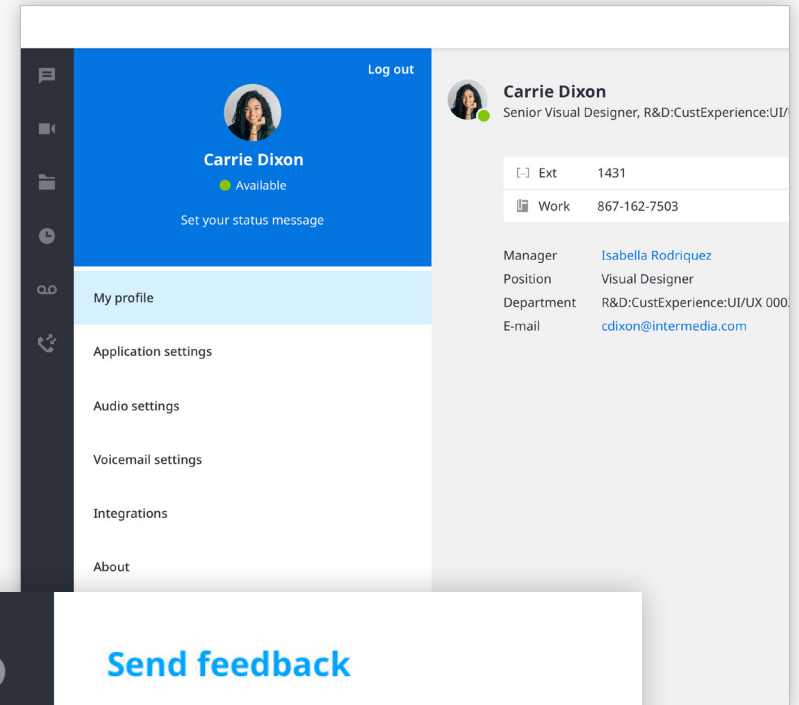
ELEVATE APPS TRAINING

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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