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Elevate Desktop and Mobile Application Get Started Guide
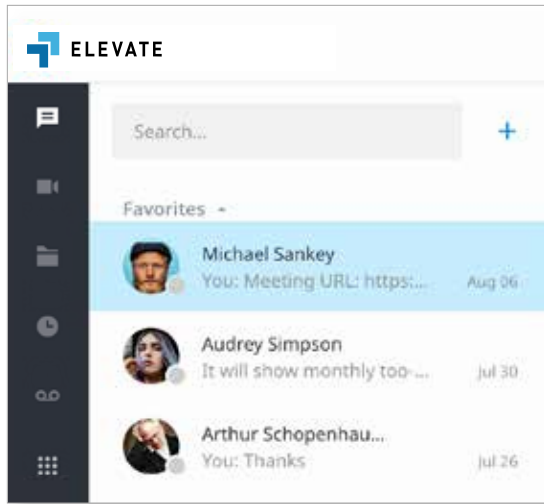
CONTENTS

OVERVIEW

The Elevate Desktop App brings essential collaboration tools together, making teamwork easier than ever. See who is available, send chats and texts, place and receive calls, share screens, start video calls and share files—all from one application.

ICON GLOSSARY	MEANING
📞	Call
📹	Meet now
👤+	Add member
📼	Voicemail
P	Park
)(	Transfer
⤵	Flip
⠿	Dail
📞	Receptionist View
💬	Chat

INSTALLATION

Elevate Desktop App is available for both Windows and Mac platforms.
You can download the app at serverdata.net/elevateapps

Once installed, login using your email address and your Elevate credentials.

*Only visible when Receptionist View is enabled.

CALLING FEATURES

Once logged into the application, you will be prompted to select a call mode.
You can use your application in two ways:

- Call Controller Mode: acts like a remote control for your associated desk phone
- Softphone Mode: place and receive calls from your PC or Mac® using the computer's external speaker and microphone. A headset is highly recommended for this mode

  Note: 911 emergency calls are not allowed and will be blocked by the application.

Calling features in the Elevate Desktop App vary based on calling mode. Please see the table below for differences between Call Controller and Softphone modes.

FEATURE / APP MODE	PLACE A CALL	RECEIVE A CALL	3-WAY CALLING	MUTE/ UNMUTE	HOLD	DTMF	CALL FLIP	CALL PARK	TRANSFER	END CALL
Call Controller	●	Desk Phone	●	Desk Phone	Desk Phone	Desk Phone	●	●	●	●
Softphone	●	●	●	●	●	●	●	●	●	●

Call Controller Mode

Placing a call:
- You can place a call using the dialpad or by selecting the 'Dial' button in a chat or a user's contact card
- Pick up the handset or press the speaker button on your physical phone

Receiving a call:
- To answer an incoming call, pick up the handset or press the speaker button on your physical phone. You can reject a call or send an incoming call to voicemail using the desktop application
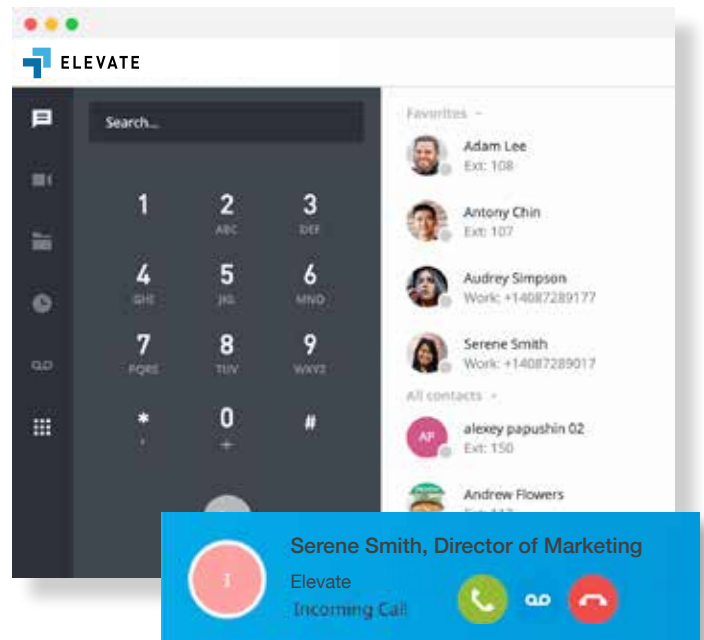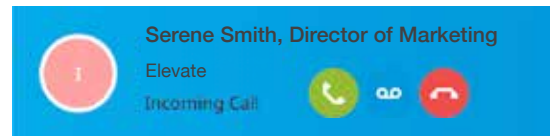
Softphone Mode

Placing a call
- You can place a call using the dialpad or by selecting 'Call' in a chat or a user's contact card
- The call will be placed through the computer

Receiving a call
- To answer an incoming call, select the 'pick-up' button in the incoming call notification.

Active Call Features

The Elevate Desktop App provides multiple options for handling calls.

Transfer

You can choose between three options to transfer calls:

- Blind transfer allows you to transfer the call without having a conversation with the user you are transferring to:

  1. While on an active call press Transfer
  2. Select the contact or use the dialpad to enter the phone number
  3. Select the Blind transfer icon

- Warm transfer allows you to consult with the party to which you are transferring a call before completing the transfer:

  1. While on an active call press Transfer
  2. Select the contact or use the dialpad to enter the phone number
  3. Select the Warm transfer icon
  4. Your first call will be placed on hold. Your second call will be established. Select "Complete" to finish the transfer.

- Transfer to voicemail allows you to send the call directly to voicemail

  1. While on an active call press Transfer
  2. Select Transfer to Voicemail icon

Call Parking

Call Park is a feature which allows Elevate users to put a call on public call park and have a different user pick it up on another phone by dialing the park location.

- Press "Park" icon next to the active call
- The system will tell you which extension the call is parked on
- Share the parked call extension with the co-worker who can help the caller
- To pick up the call, you or your coworker should dial the extension the call is parked on

  Note: After 60 seconds of a call being parked it will ring back at the original phone.

Call Flip

Call Flip allows you to continue your active call using a different device. For example, you can flip a call from your mobile to your desktop phone and vice versa.

1. While on an active call, press the Flip button
2. Call will be placed on hold and all other assigned devices will start ringing
3. Pick up the call and continue conversation on the new device

3-Way Calling

Add a third person to any active call.

1. Start a regular call with one of your contacts or any external number
2. Select "add call" on active bar
3. Choose a contact add to the call or enter a number to call
4. The first call will be put on hold. To start a 3-way call, select Merge Calls

Call History

Call History tab shows a list of all of your past calls, making it easy to return missed calls and see logs of previously made calls.
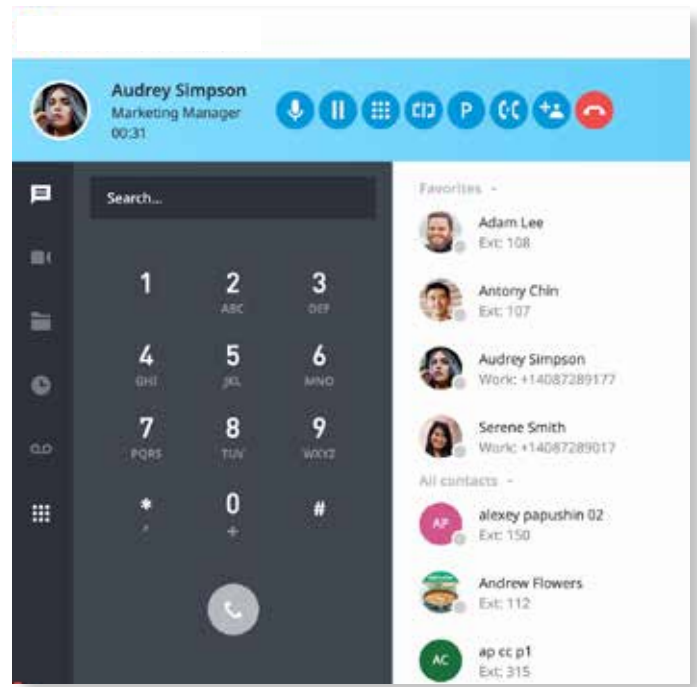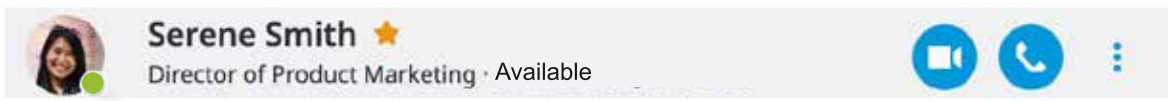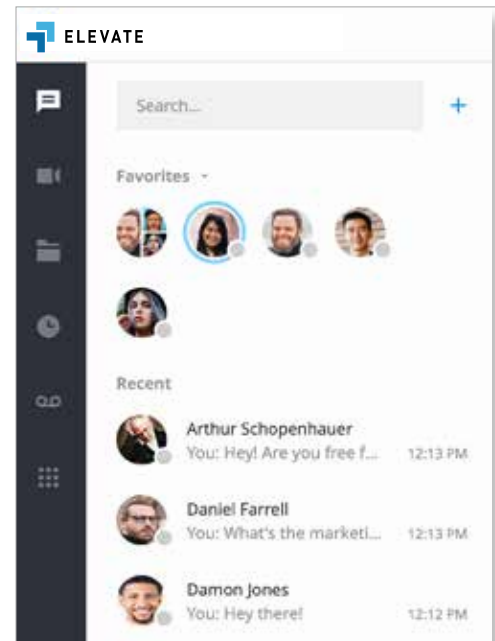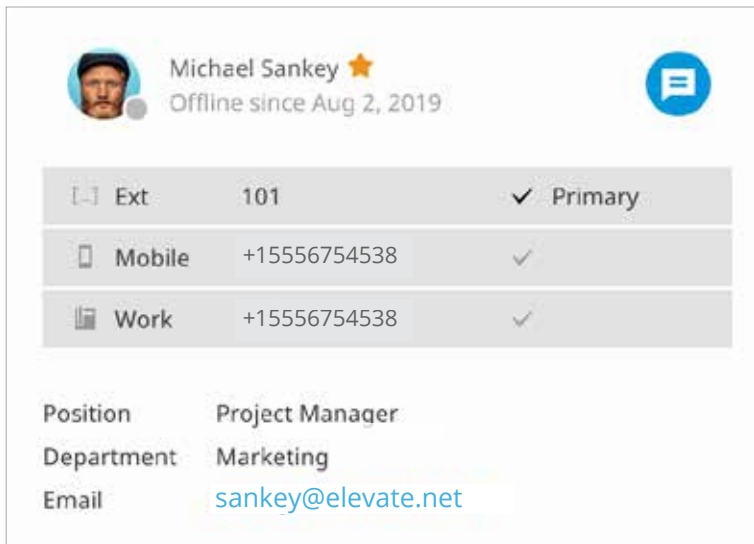
CONTACTS

Contacts Search

The Elevate Desktop App allows you to search for and initiate calls and chats with your co-workers. Searches can be conducted by first name, last name, job title, position, department, or email address.

Once the search results appear, you have two choices:

1. You can select the contact from the search results, which will open a chat window with them. From there, you can chat with them, place a call with the call button, start a meeting, or search your chat conversation.

2. Or, you can hover over their avatar, and choose to chat or pick a number to dial.
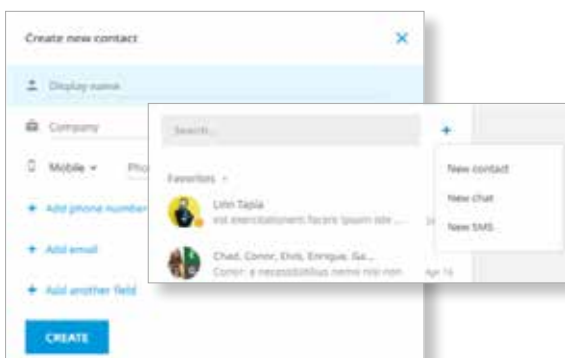
Setting Favorites & Viewing Recent Contacts

The Elevate Desktop App allows you to pin your 'Favorite' contacts to the top of your client for easy access. Below your favorites, you will see a list of your most 'Recent' chats.
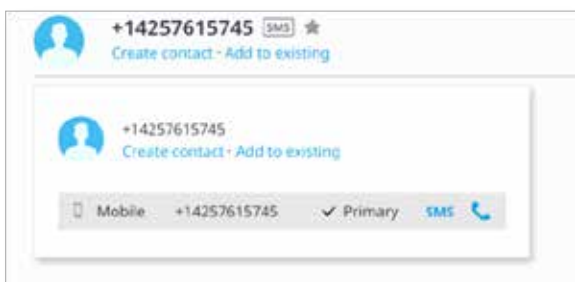
Contact Management

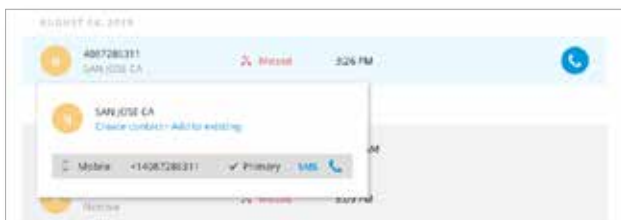**There are a few ways to create a new contact:**

1. Select '+' and choose 'New Contact'

2. You can create a new contact or edit, and existing contact based on messages sent or received.

3. Create new contact based on a placed or received call.
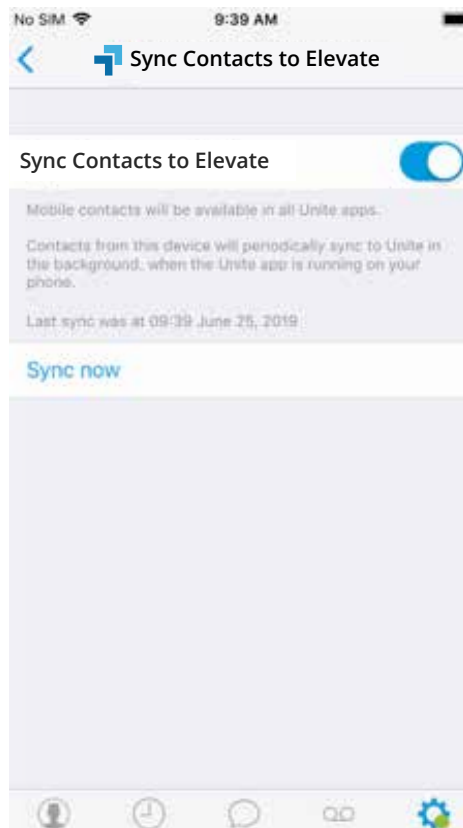

Contact Sync

From your mobile device (Android®, iOS®) sync your contacts from popular third-party platforms (Microsoft 365, G-Suite™ and more) to all your Elevate Apps.

To enable Contact Sync:

- Open your Elevate mobile app > My Account/
    Settings > General > Enable 'Sync Contacts to Unite'.
- Your contacts will automatically sync across your Elevate Desktop and Mobile apps.

TEAM CHAT & BUSINESS SMS FEATURES

The Elevate Desktop App enables you to instant message any of your co-workers or text anyone in your contact database.

Sending a chat
- You can initiate a chat by searching for a contact or select 'New Chat' and choosing the user you want to chat with

Receiving a chat
- If someone sends you a chat while you are online, the app will visually notify you that you have a new message and the message will show up in your 'Recent' list
- If someone sends you a chat while you are offline, you will receive an email. Once you come back online, your desktop app will highlight the unread chat messages

In-chat collaboration options
- 'Call' button will call the collaborator on their extension
- 'Meet now' button will start a meeting (screenshare, video call, conference call) with a chat collaborator

Meet Now

Call

Search chat conversations, add members to chat
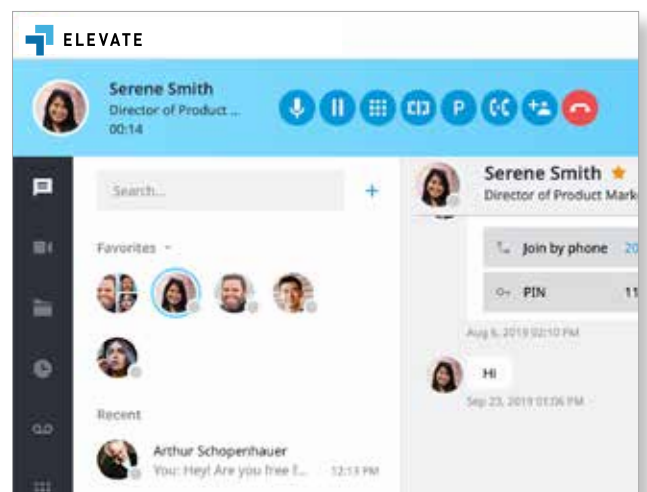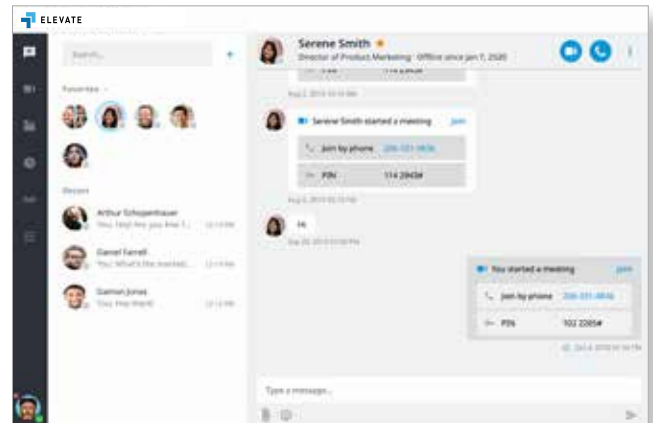
TEAM CHAT

The Elevate Desktop App allows you to create team chats, so that multiple users can participate in a chat at the same time.

Creating a team chat.

1. You can add one or more members to an existing 1-on-1 chat
2. You can create a group chat using the "New Chat" workflow

In-chat collaboration options.
- 'Meet now' will start a meeting (screenshare, video call, conference call) with team chat members
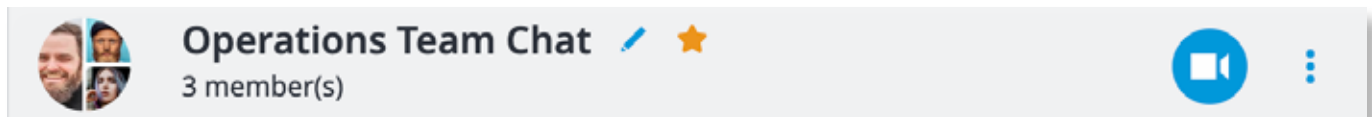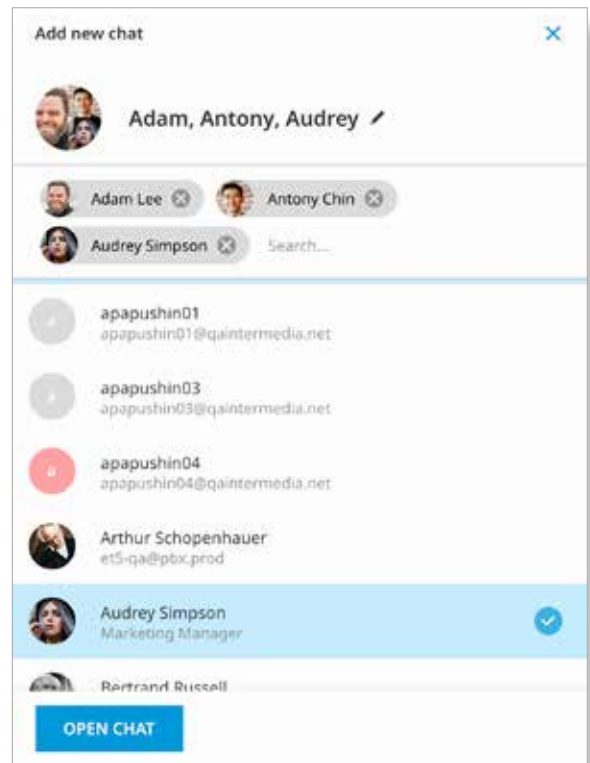
Chat history
- Chat history is retained indefinitely
- Chat history is also synced across all of your desktop and mobile devices, so that you can always refer to past conversations and have the desired context as you chat with co-workers
- Search conversation history in Elevate (1:1 chat, group chats, and SMS) to find relevant messages
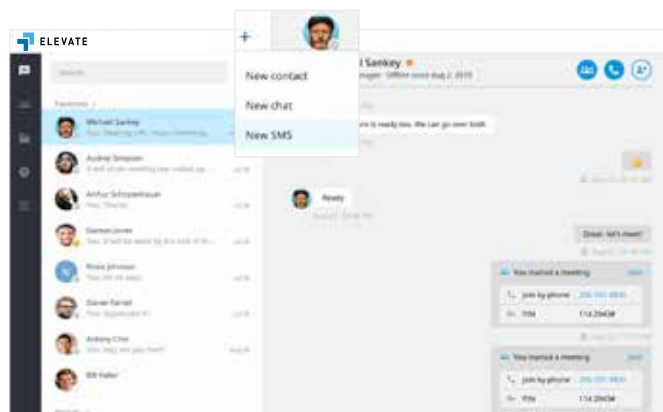
BUSINESS SMS (TEXT MESSAGE)

Send and receive text messages from your business phone number to co-workers and customers. All message will sync across Elevate Desktop and Mobile apps!

Send a new SMS

There are a few ways to initiate a new SMS:

1. Select '+' and choose 'New SMS'
   a. Enter the phone number or start typing a contacts name

2. Search for a contact in the Messaging tab, then select the contact in the search results.

   a. For contacts that have a primary number, the SMS pane will open upon click.

   b. For contacts that don't have a primary number set up, you'll need to quickly add them as a contact to send an SMS.
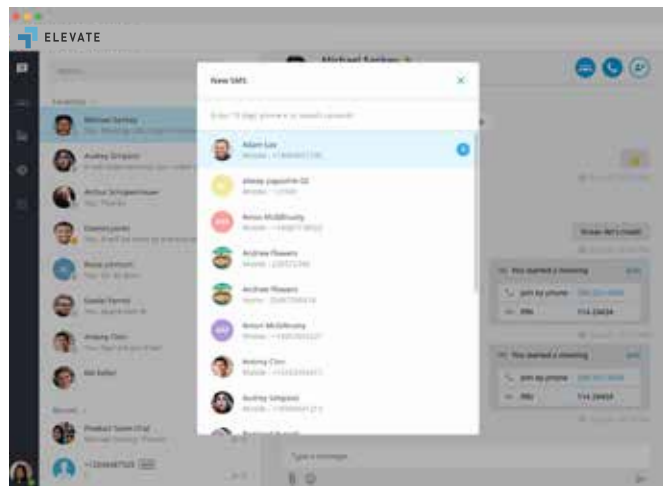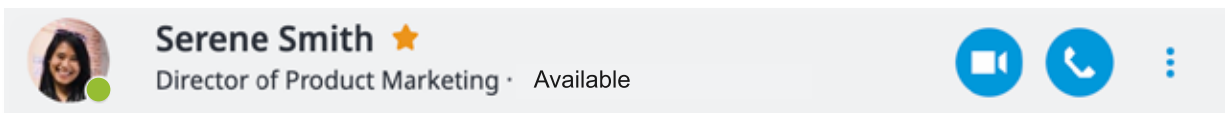
MEETINGS

The Elevate Desktop App enables you to easily start and participate in online meetings. Meetings will allow you and your co-workers to join an audio/video conference, screen share, record, etc.

Start a meeting
Users can start a meeting in 2 different ways:

1. Screensharing and conferencing with members of a chat
   a. You can start a meeting with members
      of a one-on-one or team chat by selecting the 'Meet Now' [icon] button

2. Meetings Tab
   a. You can easily start your previously scheduled meeting from the Meetings tab
      I.   Meeting details (Personal Meeting URL, Conf bridge info, etc.) are typically shared via a calendar invite
      II. Selecting START MY MEETING will launch your meeting
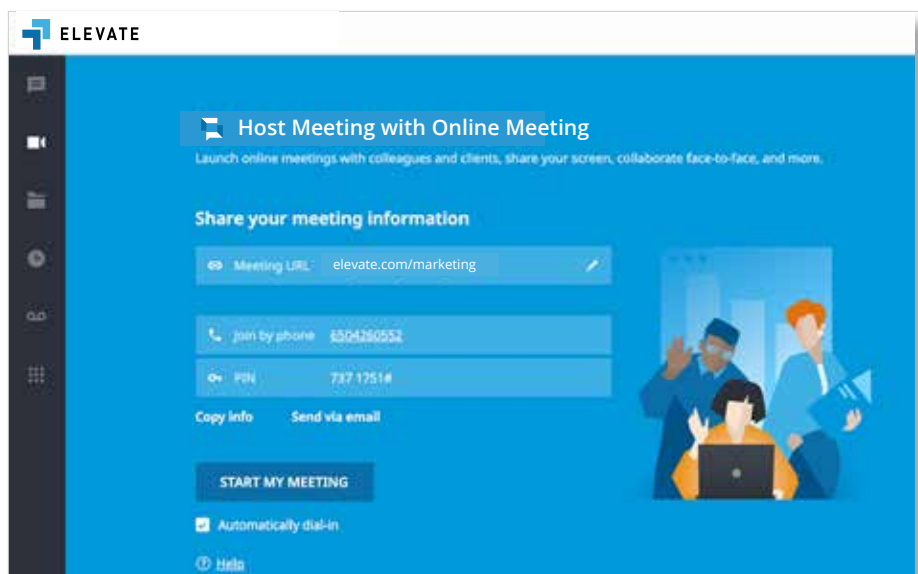
Meeting Features

- Built-in Audio Conferencing: includes a conference call number and PIN codes so participants can join by phone or computer

- Up to 200 participants on audio

- HD Video conferencing

- Screensharing

- Screen annotation

- Lock meetings so new participants can't join

Licensing

Each Elevate user account includes an Online Meeting license which supports up to 200 meeting participants via audio and 4 web meeting participants. Contact your admin if your license is not enabled or you require a license to host larger web or video meetings.

INTEGRATIONS

Connect your Elevate Desktop Application to popular third-party business applications to increase your productivity. To access the following integrations, click on your avatar and select "integrations".

Elevate CRM Screen Pops

Connect your Elevate desktop app to third-party platforms (Salesforce, Zendesk, etc.) and custom CRMs to quickly view caller's profile on inbound and outbound calls and in call history.

Elevate for G-Suite®

Click to call phone numbers on any web page, start meetings from your chrome browser, and more.

Elevate for Microsoft Outlook®

Place calls, view presence, click-to-chat, and start meetings all from your Outlook contact list, emails, and calendar events.

FILES

Elevate includes Intermedia ShareSync–a powerful backup and file sharing tool that enables you to easily and securely store, access, manage and share your files.

ShareSync is integrated with Elevate, so you can view, share, and download your files without leaving the Unite desktop app.

For the full ShareSync experience, read the [ShareSync Quick Start guide](#) for more details.
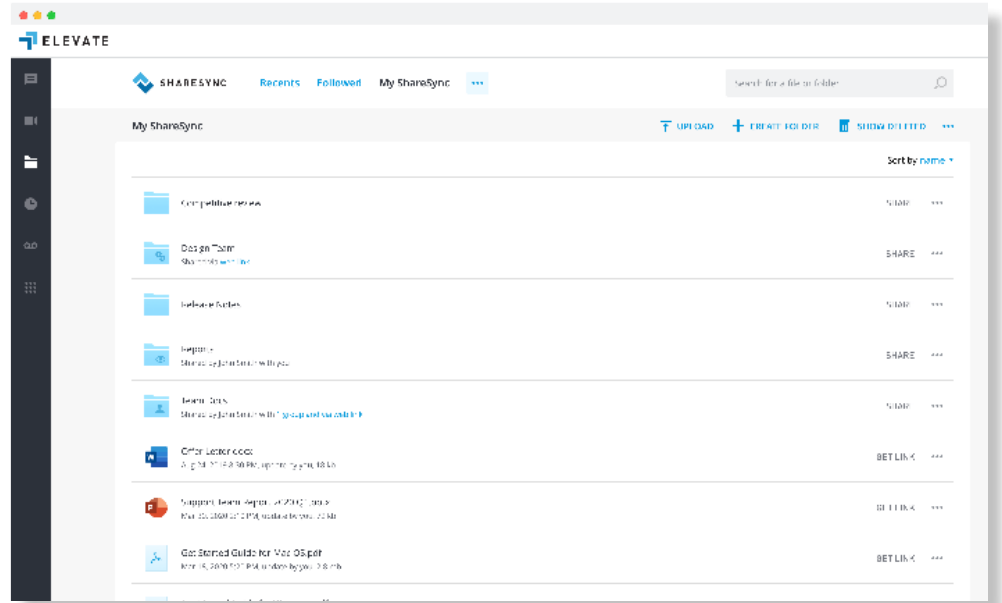
PRESENCE

Presence features within Elevate help indicate to users which of their co-workers are available for collaboration and communication.

| PRESENCE ICON	PRESENCE STATUS	HOW IS IT SET?
● (grey)	Offline	Automatically - when a user's desktop goes offline
● (orange)	Away	Automatically - when a user locks their computer or we detect no activity on the desktop for 10 min
● (red phone)	On a call/In a Meeting	Automatically - when a user is on a call or in a meeting
● (red minus)	Sharing Screen	Automatically when a user in a meeting sharing your screen
● (red)	Busy	Manually - when a user wants to indicate to others that they are busy and may not respond right away
● (green)	Available	Automatically or Manually. This status indicates that a user is available to chat or talk on the phone

Setting your presence Manually
You can manually toggle your presence by hovering over your presence ball.
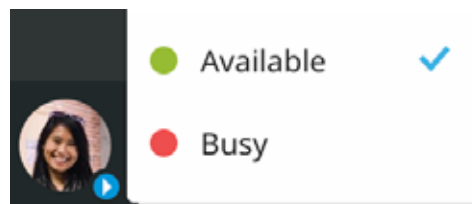
MOBILITY

Elevate mobile apps allows you to place and recieve calls, chats, text messages, attend meetings*, and manage your ShareSync files* from anywhere as though you were in the office. Apps are available for iOS and Android in the respective App stores.
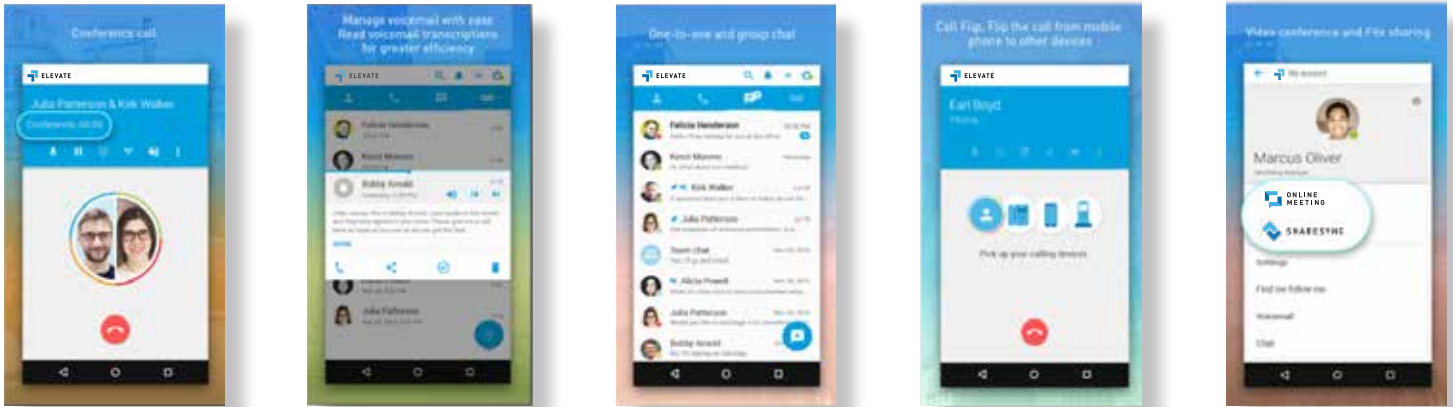
* features require Elevate Online Meeting and Elevate ShareSync apps to be installed.

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