ELEVATE USER GUIDE – Desktop Client

Downloading

- Download the Elevate Client
- Log in with your email address and password provided in the email
- Click Log in
- Click Next
- Choose if you want to use desk phone or computer

Making a Call

From the Search Bar

- Click
- Choose Elevate users or Company Contacts
- Click Search...
- Start typing a name
- Click

From the Dial Pad

- Click
- Click Phone number
- Dial the extension or number
- Click

From History

- Click
- Scroll down to find the contact
- Click

Answering a Call (Softphone only)

- Click
- Click to end a call

Logging in/out of a Hunt Group

- Click your initials or picture
- Click Agent settings
- Click Log in or Log out

Transferring

Blind Transfer

- While on a Call Click
- Type in the Contact's Name or Extension
- Click

Consult Transfer

- While on a Call Click
- Type in the Contact's Name or Extension
- Click
- Talk to the third party
- Click to complete transfer

Voicemail Transfer

- While on a Call Click
- Type in the Contact's Name or Extension
- Click

Parking

- While on a Call Click
- Listen to where the call is parked
- Click
- Click Phone number
- Dial the extension the call is parked on

Call Flip

- While on a Call Click

Note: you must download the mobile app for this to work, this will flip the call from the softphone or desk phone to your cell phone.

Conferencing (Softphone only)

- While on a Call Click
- Type in a name, choose a contact or type in a number
- Click , this will put the first caller on hold and reach out to the second call
- Click to join the calls

Mute (Softphone only)

- While on a Call Click

Unmute

- Click

Hold (Softphone only)

- While on a Call Click

Remove from Hold

- Click

Saving a Favorite

- Click
- Choose Elevate users or Company Contacts
- Click Search...
- Type in a person's name
- Hover over their picture (or initials) and click the star next to their name

Creating a New Contact

- Click or
- Click +
- Select New Contact
- Enter in the Contact Information
- Click Create

Note: this contact will save under your personal contacts tab in the dialer view

Accessing Voicemail Messages

- Click
- Select the Voice Message you would like to hear
- Click
- Click to mark as new
- Click to delete
- Click SMS or to text the caller
- Click to call the caller back

Presence Status

- Click on your initials (or picture)
- Click Available
- Choose Available, Away or Busy (Presence For Chat Purposes only)
- Choose Do Not Disturb, Out sick, On Vacation or Off work (sends calls straight to voicemail)

Viewing Call History

- Click
- Search last 90 days of calls
- Click to call the person back
- Click SMS or to text the caller

Changing Caller ID number

- Click on your initials (or picture)
- Click Call settings
- Click the drop-down box under Caller ID
- Select the number you wish to show
- Click Save Changes

Changing Call Preferences

- Click on your initials (or picture)
- Click Application settings
- Choose if you want audio or visual notifications for Calls, Chats or Voicemail
- Choose if you want to keep Elevate running in the background
- Choose if you want to start up Elevate when your computer restarts
- Click Save Changes

Changing Call Controller Status

- Click on your initials (or picture)
- Click Call settings
- Choose computer, or desk phone
- If you choose desk phone Select your Phone Model or Mobile Device
- Click Save Changes

Changing Audio Settings (Softphone Only)

- Click on your initials (or picture)
- Click Audio settings
- Click the drop-down box to select your speaker
- Click the drop-down box to select your microphone
- Click Save Changes

Changing Voicemail Settings

- Click on your initials (or picture)
- Click Voicemail settings
- Enter a new PIN if you choose
- Click to walk through how to set up a voicemail greeting
- Choose if you want transcription
- Choose if you want email notification
- Choose where you want the email notification sent (could be multiple)
- Choose if you want a wav file of the message attached to the email
- Click Save Changes

Chat

Single Chat

- Click
- Search a Contact or Number if a chat already exists or Click +
- Select New Chat or New SMS
- Type a message in the text box and press enter to send
- Search for the person you want to send a message to
- Click
- Click Open Chat
- Type a Message
- Press enter or click to send

Group Chat

- Click
- Search a Contact or Number if a chat already exists or Click +
- Select New Chat or New SMS
- Type a message in the text box and press enter to send
- Search for the person you want to send a message to
- Click next to everyone you want to add
- Click Open Chat
- Type a Message
- Press enter or click to send

Creating a Personalized Group

- Click
- Choose
- Type in the Group Name
- Type in the name of the people you want to add
- Click
- Click Create group

Conference Bridge Call

- Click
- Click Copy info to copy the info to paste somewhere like a chat or meeting invite OR click Send via email to open an email with call information already populated in the body
- Click Start meeting to automatically join your meeting
- You can see a list of attendees, chat and share notes with your attendees.
- Click or to mute yourself
- Click to turn your web cam on
- Click to share all or parts of your screen
- Click to record your meeting
- Click to select how you want to view videos
- Click to turn on the virtual assistant (transcription)
- Click to lock your meeting
- Click to end your meeting for everyone
- Click to change your settings:
  -Add an international dial in number
  -Add Custom Branding
  -Add a Virtual background
  -Pointers on how to use the virtual assistant
  -Security options such as locking the meeting, muting others, unmute themselves, turn on webcams, share screens or videos, use chat or private chat, or use meeting notes
  -General options such as having people join muted, play entry and exit chimes, enable attendees to send emoji reactions

Accessing Call History

- Click
- Click Meeting history
- Choose how far back you want to search
- Find the meeting you want to view
- Click on the title of the meeting
- Click on the underlined reports to view Attendance, Transription, Chat report or Viewer's Report.

Share Sync

- Click
- Click My ShareSync
- Click CREATE FOLDER

OR

- Drag and drop files or Click UPLOAD

File Sharing

- Click SHARE (Internal User)
- Type in the name of the co-worker you would like to collaborate with
- Choose which permissions they have: Co-Owner, Modify or View:

Permissions:	Co-owner	Modify	View
Download	✓	✓	✓
Add	✓	✓	
Edit	✓	✓	
Delete	✓	✓	
Restore deleted files	✓	✓	
Restore by date	✓	✓	
Permanently delete	✓		
Re-share	✓		
Send link	✓		

- Choose ADVANCED SETTINGS to edit:

☑ Folder will sync to collaborators' desktops by default

☐ Follow the folder
You will receive notifications about the folder updates on your desktop client

- Click SHARE

OR

- GET LINK (External User)
- Choose an option for the link:
  -View and Download
  -View Only
  -Download & Upload
  -Upload Only
- Click Create new Link
- Click ACTIONS to choose how you want to send link by email or edit the link's password or expiration date
- Click COPY LINK, then paste Link into an email and send off to the third party
- Click ··· To download, Manage Collaborators, follow this document or folder, Copy, move, rename, delete or restore to a previous version.

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