ELEVATE USER GUIDE – Desktop Client

Downloading

- Open the email sent to you by elevate technical support
- Download the Elevate Client
- Log in with your email address and password provided in the email
- Click Log in
- Click on your initials in the corner
- Choose Application Settings
- Check the box for receptionist view
- Click Save Changes

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

- Click
- Click to end a call

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

Conferencing (Soft phone 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

- While on a Call Click

Unmute

- 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

Hold

- While on a Call Click

Remove from Hold

- Click

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.

Accessing Voicemail Messages

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

LOFFLER

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

Presence Status

- Click on your initials (or picture)
- Click Available
- Choose Available or Busy (Presence For Chat Purposes only)

Creating a New Contact

Single Chat

- Click
- Search a Contact or Number if a chat already exists 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

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

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
- Click to mute yourself
- Click to turn your web cam on
- Click to share all or parts of your screen
- Click to access files for your meeting
- Click to record your meeting
- Click to lock your meeting
- Click to end your meeting for everyone
- You can also see a list of attendees, and if you have pro you can chat and share notes with your attendees.

Share Sync

- Click
- Click Open Web App to open ShareSync on the web OR download the Application for Windows
- Drag files to ShareSync to store them there.

File Sharing

- Click SHARE (Folder)
- Enter in an email or User to share the folder 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	✓		

- Click SHARE
- 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

OR

- GET LINK (File)
- Click ACTIONS to choose how you want to send link by email or edit the link's password or expiration date.
- Click ··· To download, Manage Collaborators, follow this document or folder, Copy, move, rename, delete or restore to a previous version.

Note: this is similar to one drive