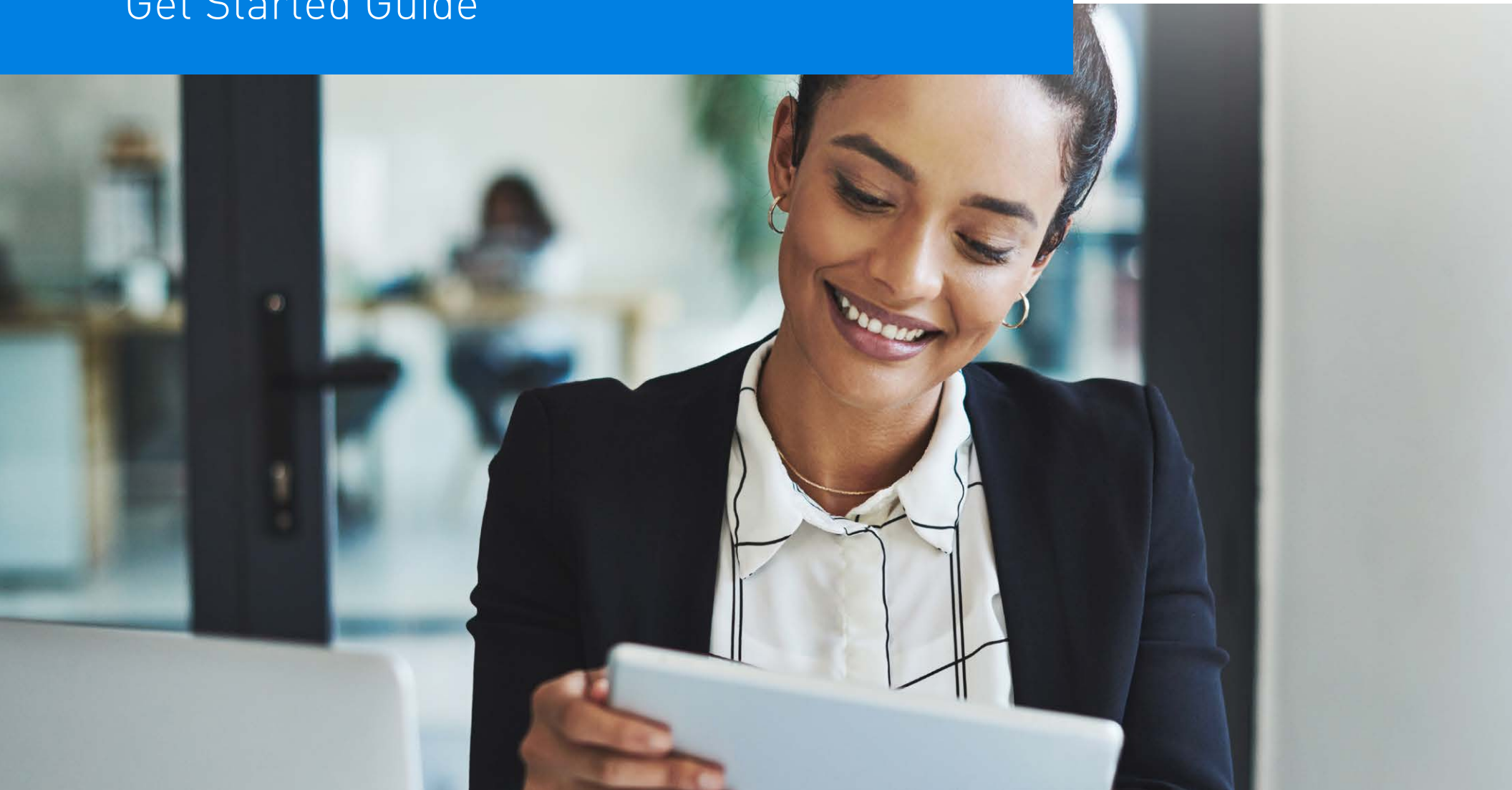


Elevate Desktop and Mobile Application Get Started Guide



Elevate Quick Start Guide

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

Channels

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

Search

Search for people in your organization

Messaging

Communicate in real-time with team chat and business SMS*

Video

Start a video conference, share your screen, and more

Manage Channels

Add members, search, favorite and more

Video Conferencing

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

Voicemails

Manage and view voicemail transcriptions

Dialpad

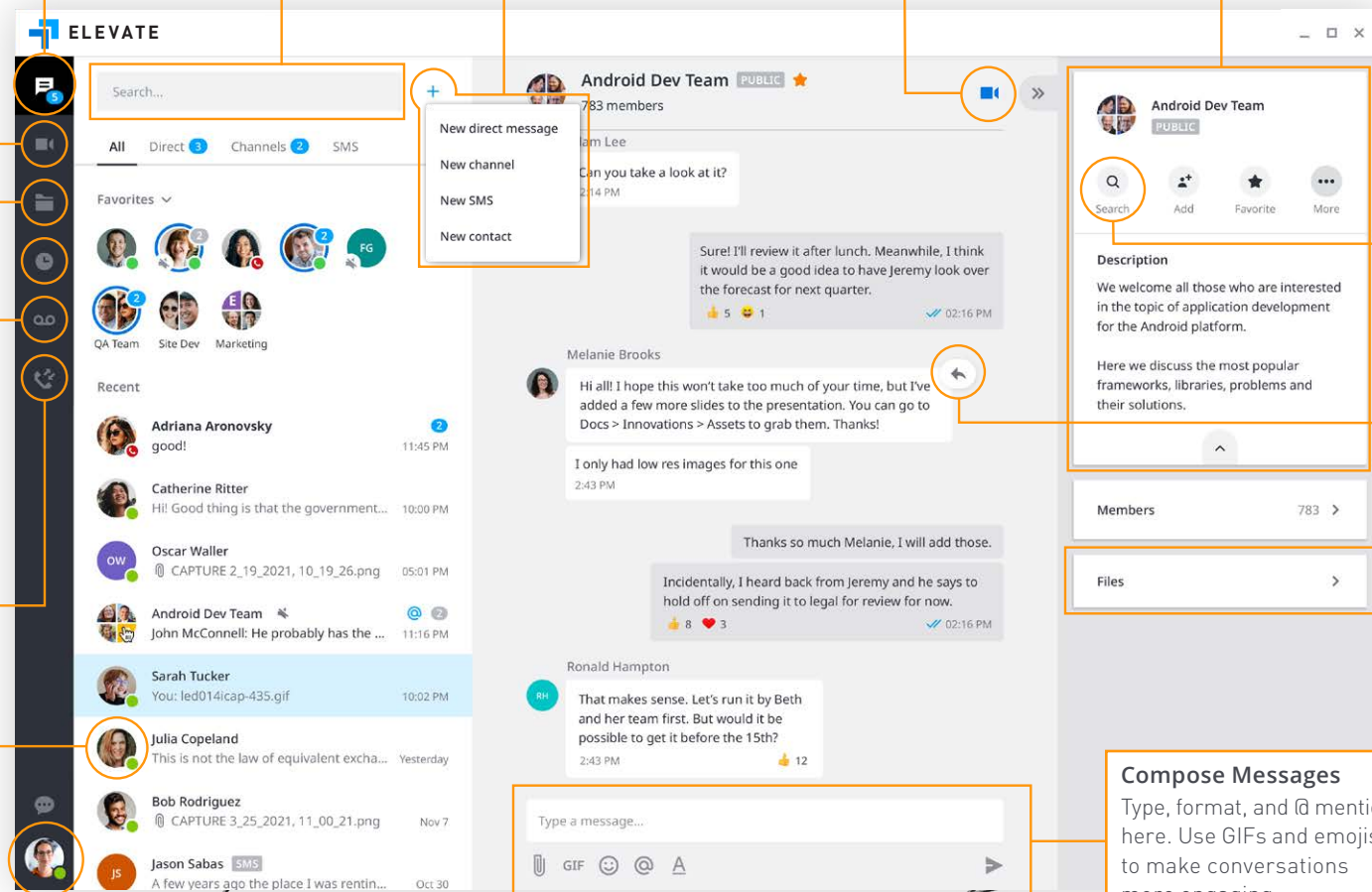
Access company directory at-a-glance, manage and place calls

Presence

View co-worker availability in real-time

Settings

Manage application settings, notifications, access integrations, 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

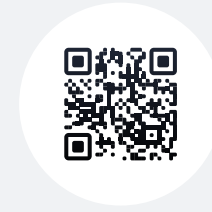
Type, format, and @ mention here. Use GIFs and emojis to make conversations more engaging

Installation

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



Download Desktop App



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

Sign In

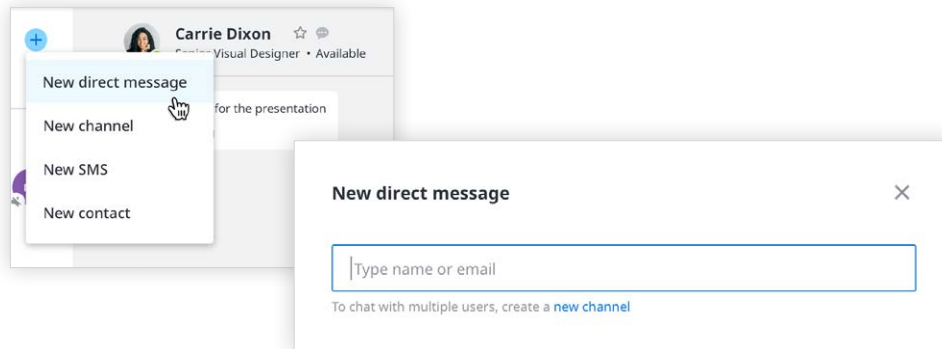
Log in to the desktop and mobile applications using your work email address and Elevate password.



Team Chat

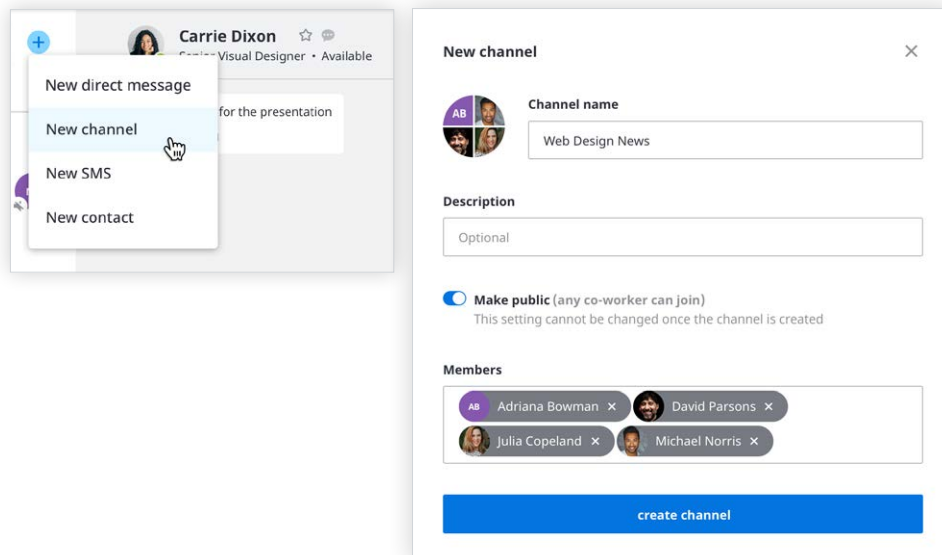
Start a chat

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 ►



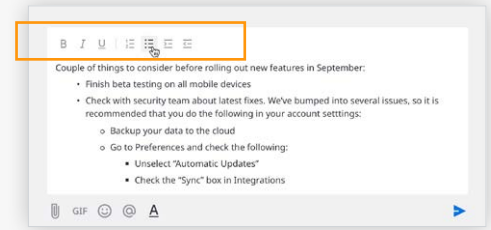
Create a new channel:

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.



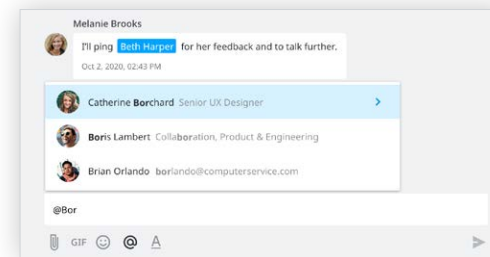
Format your messages

Use the rich text editor to organize and format messages.



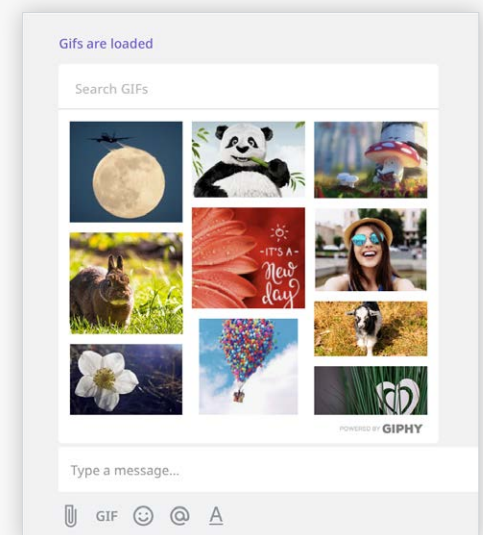
Use @ mentions

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

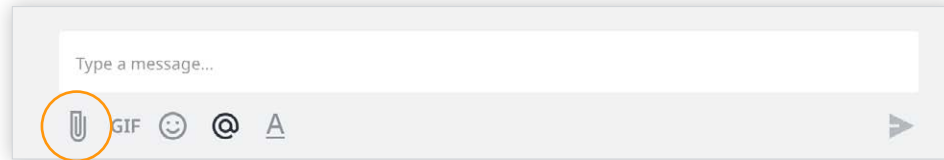
Have fun with co-workers by adding emojis and GIFs to chats. Select the 😊 for emojis or GIF to add a GIF.



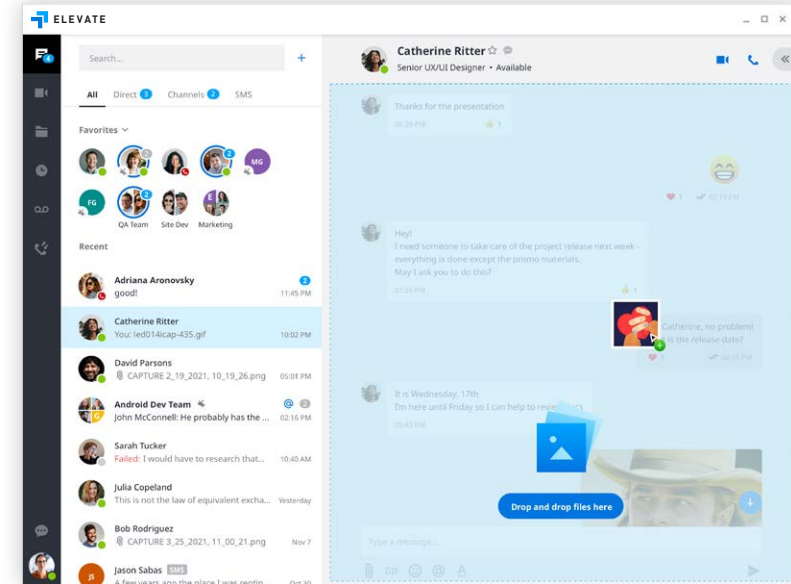
Team Chat

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

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

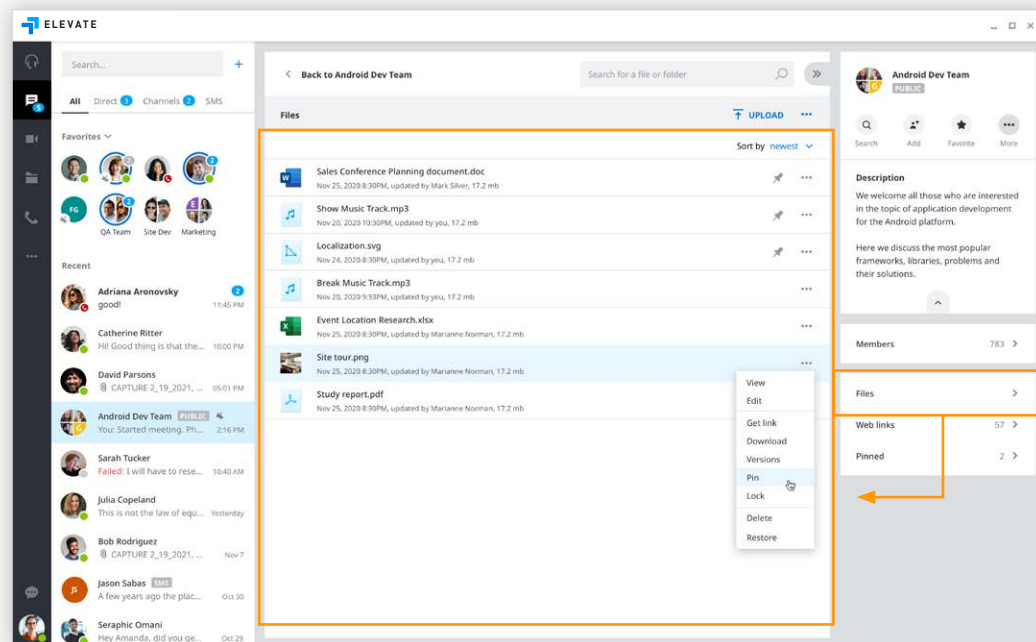


Drag and drop documents from your desktop directly into any message.



Filter files

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



Video Conferencing

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

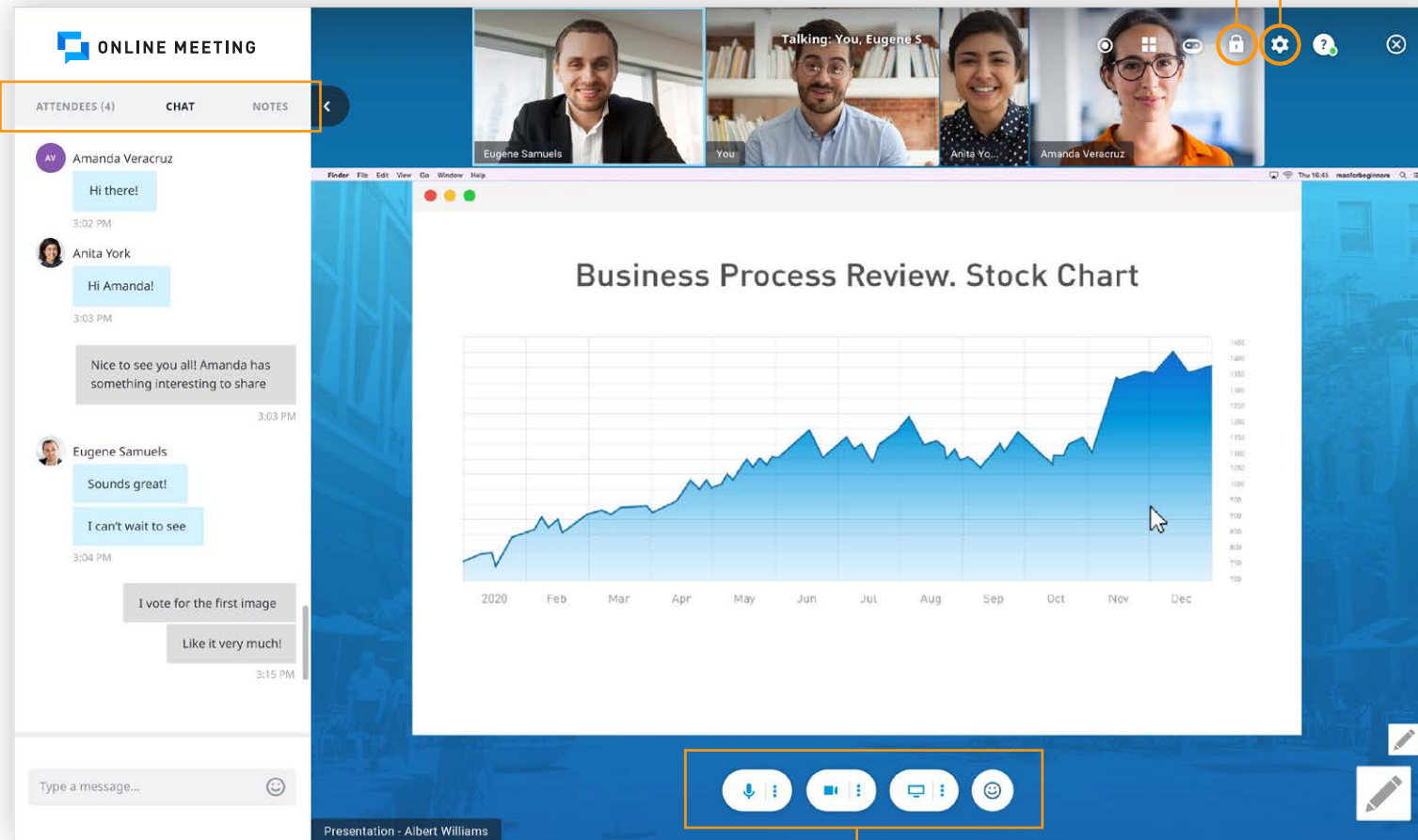
Scan the QR code
or download from the
iOS or Android Store.



View meeting participants, send chats, and more.

Lock meetings for an extra layer of security. No one will be able to enter your meeting without permission.

Access advanced, security settings, virtual backgrounds, and more.



The screenshot shows a video conferencing interface. At the top, there's a header with the logo and 'ONLINE MEETING'. Below it, a row of four video thumbnails shows participants: Eugene Samuels, You (Eugene S.), Anita York, and Amanda Veracruz. To the left is a chat window with messages from Amanda Veracruz, Anita York, Eugene Samuels, and a system message. The main area displays a presentation slide titled 'Business Process Review. Stock Chart' with a line graph showing stock performance from 2020 to December. At the bottom, there's a toolbar with icons for mute/unmute, hop on camera, share screen, and a smiley face. A status bar at the very bottom says 'Presentation - Albert Williams'.



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

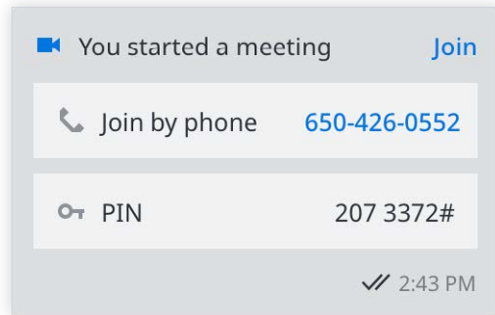
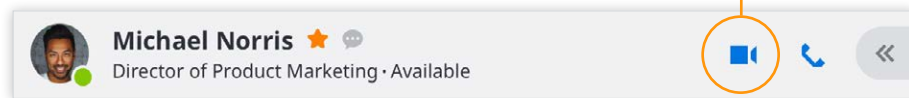
Mute/unmute, hop on
camera, share your screen.

Video Conferencing*

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

Start a video conference

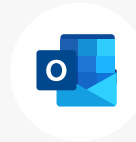
From a direct conversation or channel, select



From the meeting tab, you can:

Select "Start my meeting"
or join a meeting

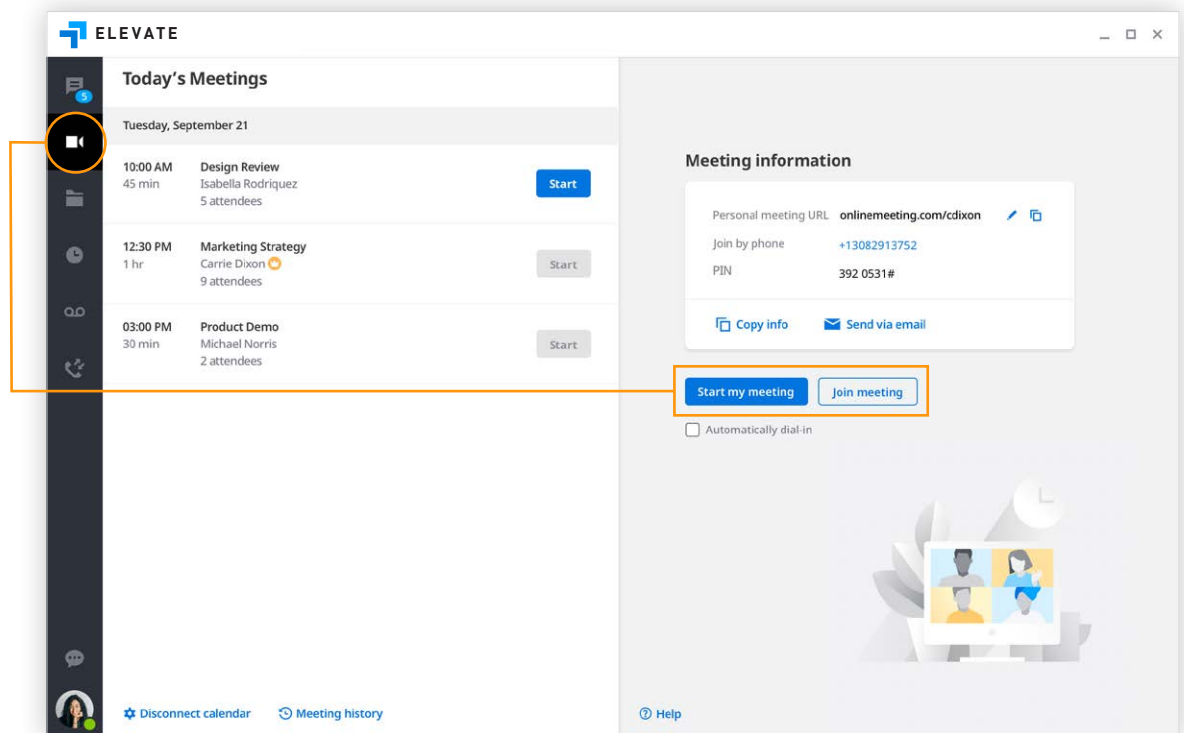
Integrate your Outlook or Google calendar so you can easily start and schedule meetings directly from your work calendar.



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.



File Sharing*

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



Download Desktop App



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

The screenshot displays the ELEVATE ShareSync web interface. A sidebar on the left contains icons for chat, video, contacts, and a profile. The main area shows a file list under 'My ShareSync > Documents'. Callouts highlight the following features:

- Access, share and manage files:** Points to the sidebar icon.
- View recent files:** Points to the 'Recents' tab.
- Access Favorite files and folders:** Points to the 'Favorites' tab.
- Upload, organize and store files:** Points to the 'UPLOAD' button.
- Star icon:** Points to a star icon next to the 'Backup feature launch' folder, indicating a favorite.

The file list includes folders like 'Backup feature launch', 'Buying Criteria', 'Content base campaign', 'Emails', 'Files', and 'V1', each with a 'SHARE' button and a menu icon.

*Available for Elevate Pro and Enterprise licenses only.

Calling

Place, receive and manage calls in two ways:

- **Softphone mode:** Use computer speakers and microphone for calls (can use Bluetooth headset or headphones)
- **Call Controller mode:** Use hardware (desk phone) for calls

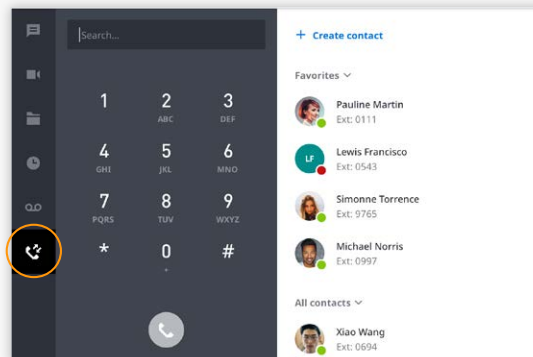
Application mode	
<input checked="" type="radio"/> Softphone	Telephone calls made over the Internet use a computer, rather than dedicated hardware
<input type="radio"/> Call Controller	Telephone calls made over the Internet use a hardware phone

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
Call Controller	●	Desk Phone		Desk Phone	Desk Phone	Desk Phone	●	●	●	●
Softphone	●	●	●	●	●	●	●	●	●	●

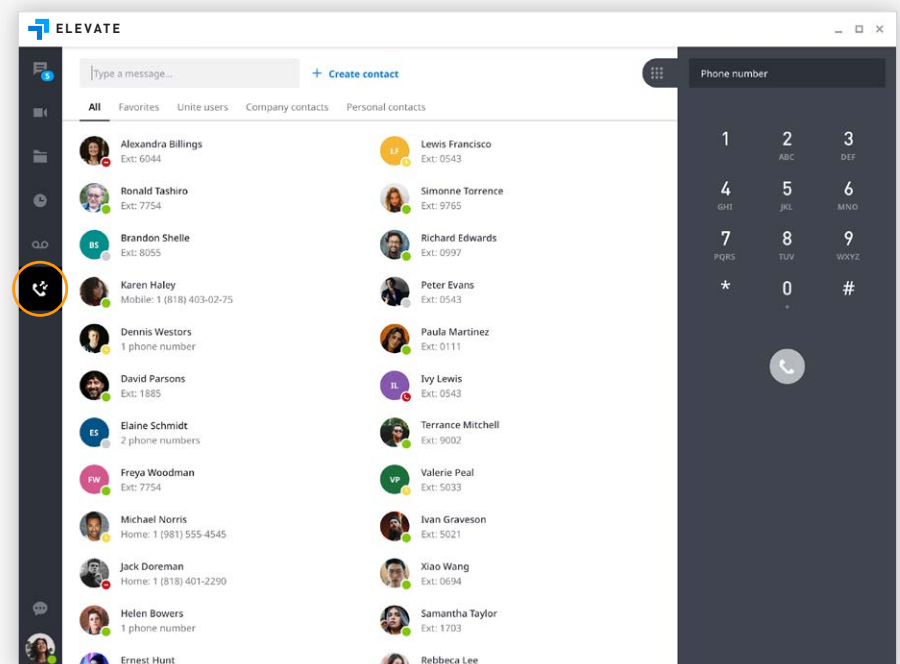
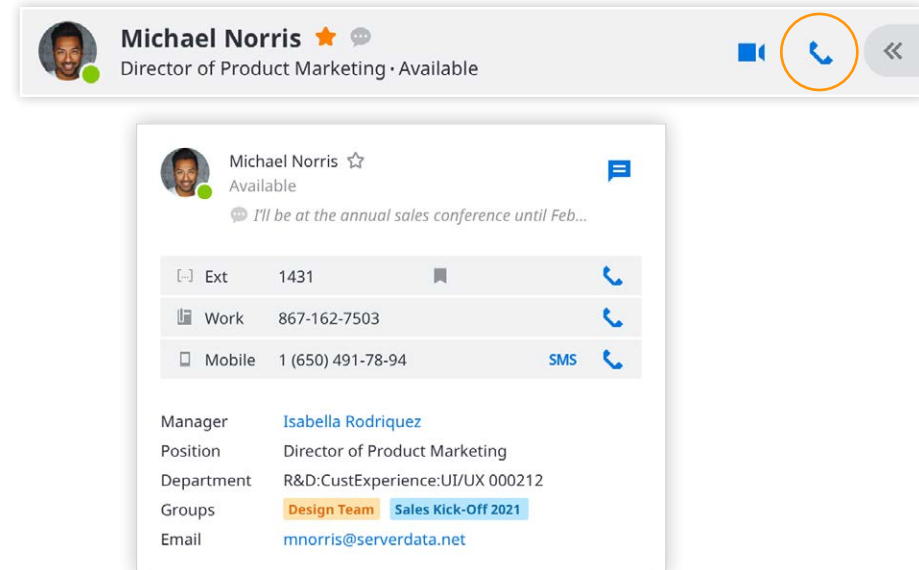
Place calls and view contacts

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

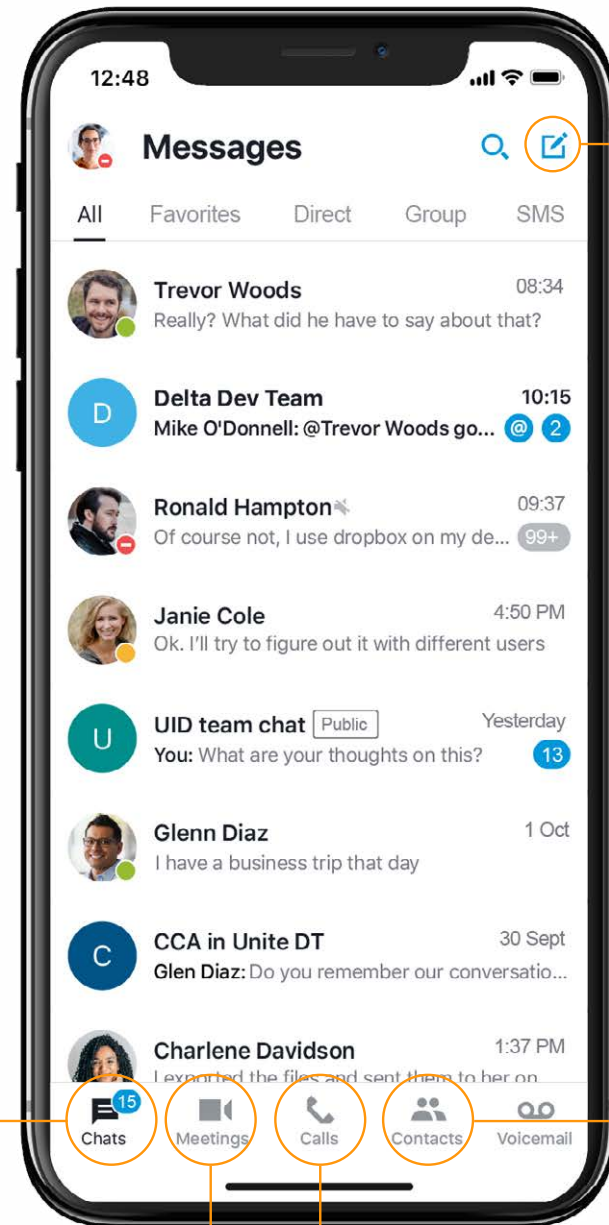
Call, chat, meet and collaborate from your mobile device with the Elevate mobile application.



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 North America.

**Users will need to download Online Meeting mobile app.

Next Steps

Want to learn more?

Join our weekly live training session:



ELEVATE

ELEVATE APPS

LIVE TRAINING

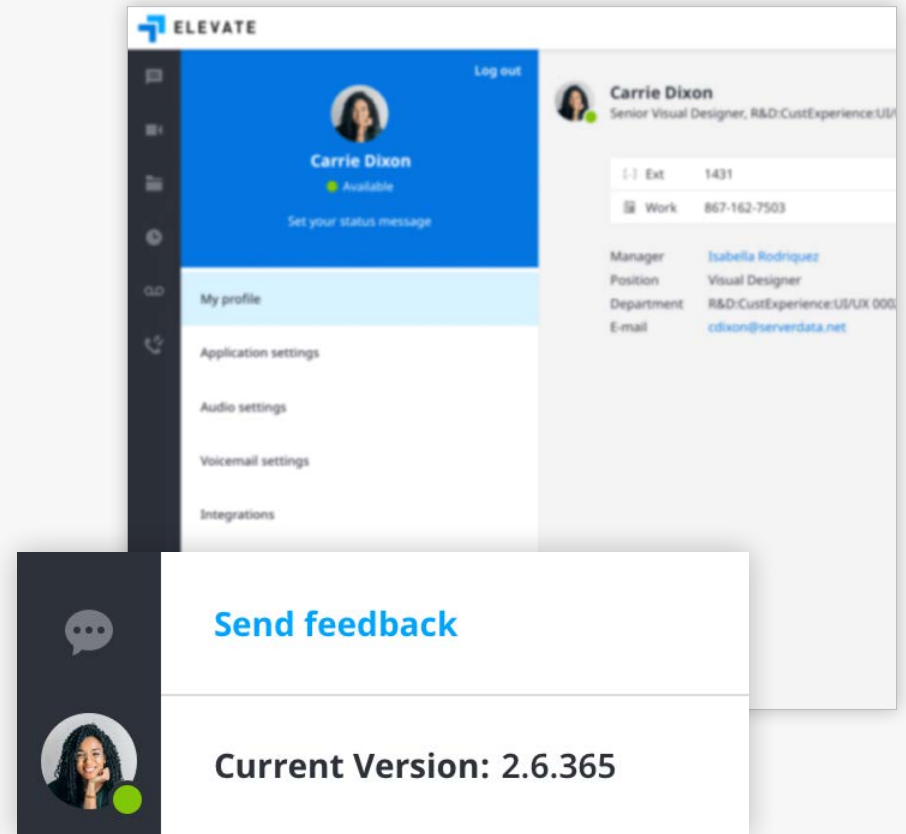
REGISTER TODAY!

THURSDAYS | 10:00AM PT | 1:00PM ET

Send us your feedback:

Are you enjoying Elevate?

Is there room for improvement? Let us know!



ELEVATE

Log out

Carrie Dixon
Available
Set your status message

My profile

- Application settings
- Audio settings
- Voicemail settings
- Integrations

Carrie Dixon
Senior Visual Designer, R&D:CustExperience/US/

Ext: 1431
Work: 867-162-7503

Manager: Isabella Rodriguez
Position: Visual Designer
Department: R&D:CustExperience/US/UX 000
E-mail: cdixon@serverdata.net

Send feedback

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Treasure Coast IT Solutions

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