

 **ELEVATE**
UNIFIED COMMUNICATIONS
Computer & Mobile Application
User Guide



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LOG IN

To log in to the Computer app:

- From any web browser, enter: elevate.serverdata.net
- Username: Your **email address**
- Password: [provided by NATG]
- Click **SIGN IN**
- You will be prompted to change your password

Note: if you have forgotten your password, simply click “Forgot Password?”, you will be sent an email with instructions on how to reset it

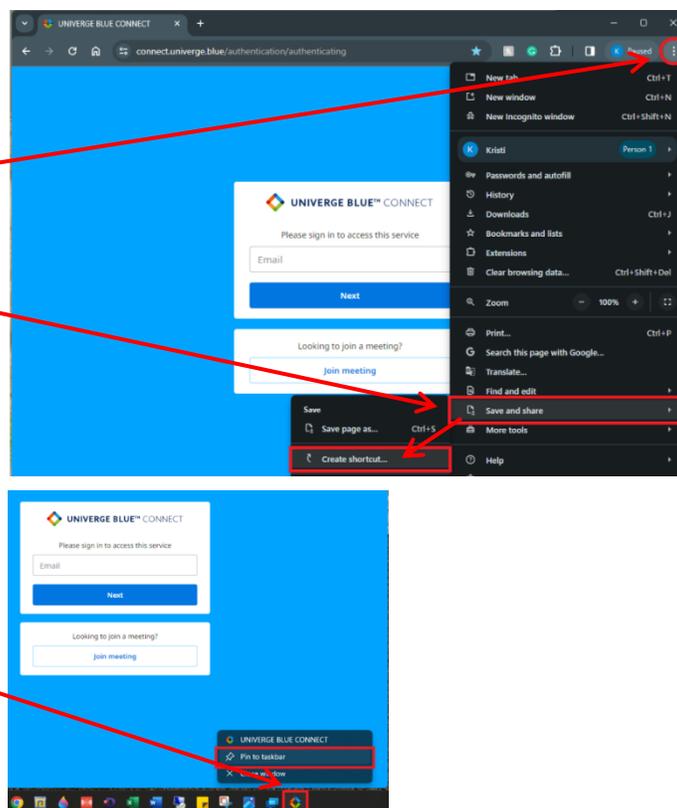
Once logged into the application, you will be prompted to select a call mode. You can use your application in two ways:

- Deskphone Mode:** This will be used if you also have a desk phone
- Computer Mode:** This will be used if you do not have a desk phone and will place and receive calls from your PC or Mac® using the computer’s external speaker and microphone. Note: A headset is highly recommended for this mode

Creating a standalone window for Univerge Blue

To log in to the Computer app:

- Using Chrome, log in to the Computer app
- Click the three dots in the righthand corner
- Click Save and share
- Click Create shortcut
- Name the shortcut “Univerge Blue”
- Select “Open as window”
- Click Create
- This will open the page as a standalone page with no option to add other pages (hopefully making it easier to locate and less likely to close by accident).
- With the window open, right-click on the icon, click Pin to taskbar



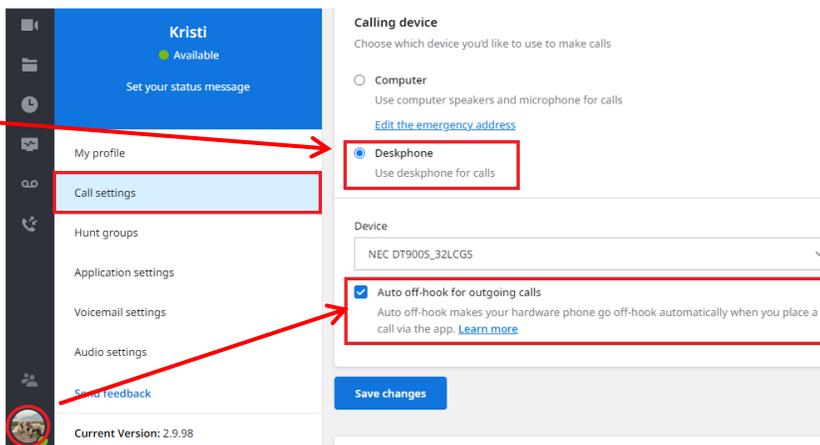
DESKPHONE MODE: Enables you to enhance your experience by remotely controlling your hardware phone, which is used to place and receive calls.

COMPUTER MODE: Puts the app in Softphone mode, enabling you to place and receive calls using only the Elevate Desktop app.

To choose Deskphone mode:

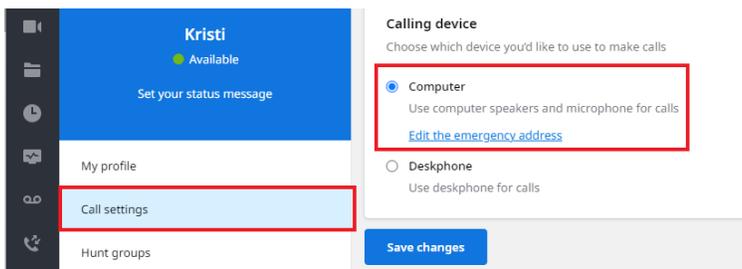
1. Navigate to the Settings/Profile icon
2. Click Call Settings
3. Select Deskphone
4. Under Device, if you have multiple devices, select which device you'd like to use when making calls out. When calls are made from the app, they will be delivered to this deskphone.
5. Save changes

NOTE: It's recommended to enable "Auto off-hook" in deskphone mode. When enabled, calls made in the mobile app will ring on your desk phone's speakerphone, and you can pick up the handset. If disabled, you must pick up the handset to complete the call.



To choose the Computer mode:

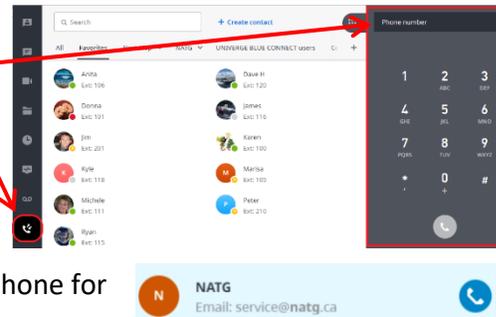
1. Navigate to Settings/Profile icon
2. Click Call Settings
3. Select Computer mode from the drop-down list
4. Save changes.



PLACING A CALL

Deskphone Mode – Uses your desk phone to make/answer calls

1. Through the computer application:
 - a. Click the Calling icon  to access the Dialpad, then key in the number you'd like to dial. Press Send or Enter on your keypad to complete the call. The call will be delivered to your desk phone for audio.
 - b. OR When viewing a contact or call history, you will see a dial button next to the contact. Click that button to call the contact. The call will be delivered to your desk phone for audio.
2. To make a call from the desk phone, pick up the handset (or press the 'Speaker' button) and dial the number. You do not need to choose a line or dial a 1 in front of a long-distance number.



Computer Mode – Uses your computer to make/answer calls

1. You can place a call using the Dialpad  or by clicking on the 'Call' button in a chat or a user's contact card
2. The call will be placed through the computer



RECEIVING A CALL

Deskphone Mode – Uses your desk phone to make/answer calls

1. To answer an incoming call, pick up the handset, using your headset, **or** Press the 'Speaker' button on your physical phone.
2. You can reject a call or send an incoming call to voicemail using the desktop application

Computer Mode – Uses your computer to make/answer calls

1. To answer an incoming call, click the 'Pick-Up' button in the incoming call notification or the 'Hang-Up' button to ignore the call. Click on the 'Voicemail' button will send the caller directly to voicemail



HOLD

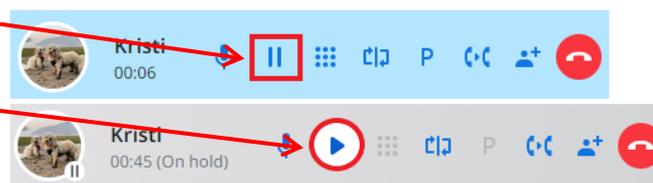
When placing a call on hold, the call will remain on hold on your deskphone/app only and no one else will be able to retrieve that call. A call on hold is exclusive for yourself. If you need someone else to answer the call, you will need to Park the call or Transfer the call.

Deskphone Mode – Uses your desk phone to make/answer calls

- If you are in Deskphone mode, you will need to use your deskphone to press Hold. The call will be placed on hold on your personal line and will flash green. To retrieve the call, you will press the flashing green light.

Computer Mode – Uses your computer to make/answer calls

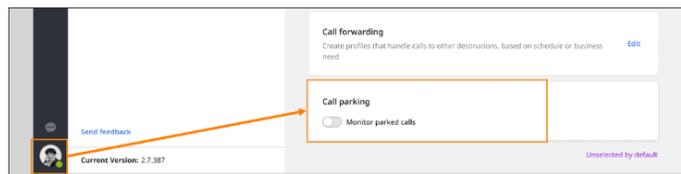
- If you are in Computer mode, you will press the Hold key on your computer app.
- To retrieve the call, press the Play/Resume key



CALL PARKING

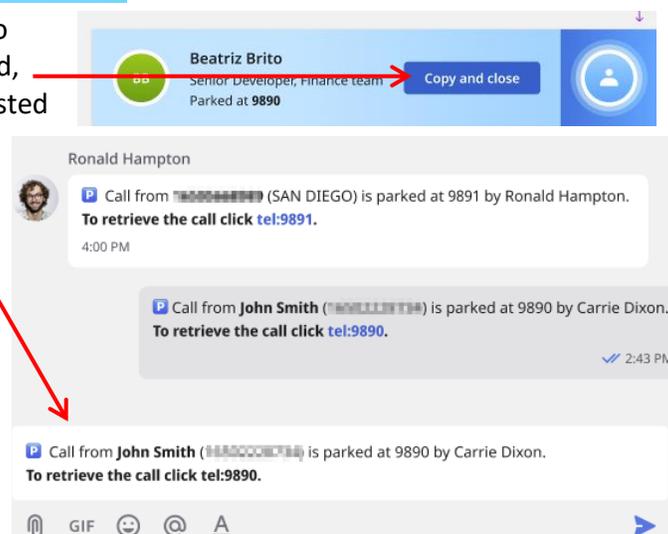
Call Park is a feature that allows CONNECT users to put a call on a public call park and have a different user pick it up on another phone by dialing the park location.

1. Navigate to Settings/Profile icon
2. Click Call Settings
3. Scroll to the bottom and turn on Monitor parked calls



PARKING A CALL

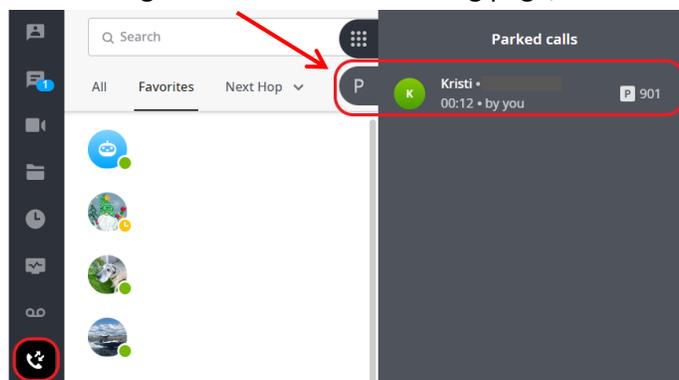
1. While on an active call, Press the P (park) icon
2. The system will announce the park number and also display the Copy & Paste function. When this is used, the parked call information is copied and can be pasted into a chat. The copied message includes caller information and a clickable link that allows answering the parked call.
3. Otherwise, you can call the employee and let them know the park number to pick up.



RETRIEVING A PARKED CALL

When Monitor Parked calls feature is enabled, a Parked call monitoring icon is added to your dialpad on your calling page.

1. Navigate to the Park monitoring page, and click the call icon next to the parked call OR



2. Dial the park number from the dial pad on your app or desk phone (if applicable).

PARKING/RETRIEVING A CALL THROUGH YOUR DESKPHONE

1. Using your desk phone, you will press the PARK Call button. The system will automatically assign the call to a park number (ex. Parked on 901)
2. To retrieve the parked call: Press the lit park key OR Dial the Park number

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. Click on the 'Blind' transfer icon 



Warm transfer allows you to consult with the party to which you are transferring a call to 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. Click on 'Warm' transfer icon . Your first call will be placed on hold. Your second call will Be delivered to your phone.
4. Press the Answer key (on your phone)
5. Announce call. Click Complete Transfer 

To cancel: Click End  button, then click Resume (if in Deskphone mode, the Resume key is located on the display of your phone)

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

1. While on an active call press 'Transfer' 
2. Key in name or extension
3. Select 'Transfer to Voicemail' icon 



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 
2. The call will be placed on hold and all other assigned devices will start ringing
3. Pick up the call and continue the conversation on the new device



CALL HISTORY/REDIAL

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

1. Click the Call History  icon to view incoming/outgoing/missed calls
2. Hover over the call, and select the action you would like to take place:
 - a. Phone  icon to dial them
 - b. Chat  icon to chat (for internal extensions) with them or
 - c. SMS  icon (for external number, if Application – must have a Pro license)

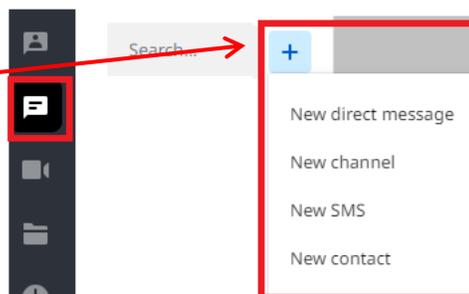
CHAT/SMS

CONNECT Desktop enables you to instant message any of your co-workers

Sending a chat

There are a few ways to initiate a chat:

1. In the Chat screen, click the + icon
2. Select:
 - a. New Chat to chat one of one with a coworker
 - i. Enter the coworker's name to start the chat
 - b. New Channel (group chat)
 - i. Name the Channer, for example: "Admin Group"
 - ii. Enter the names of the coworkers you'd like included in the Channel
 - c. New SMS (If applicable (must have a Pro or Teams license))
 - i. Enter the phone number you'd like to send an SMS to. This will be sent from your direct phone number
3. You can also use the chat feature in other tabs like accessing your calling page and hovering over a coworker or contact or in your call history screen, hover over the contact and click the chat icon



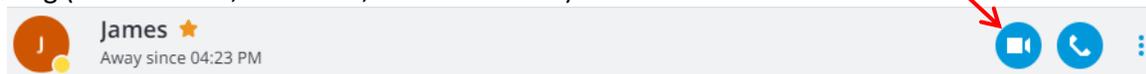
Receiving a chat

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. To access your chats, click the Chat icon

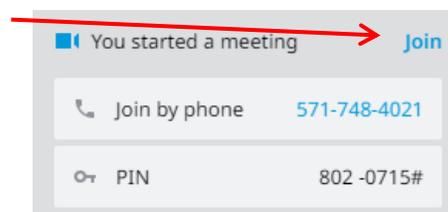
Note: SMS is only applicable with Pro or Teams licenses. The Essential license does not include SMS. If you are unsure which license type you have, please consult with administration.

In-chat collaboration options

The 'Call' button will call the collaborator on their extension 'Meet Now' button will start a meeting (screen share, video call, conference call) with a chat collaborator



Note: If using Meet Now, your coworkers will be sent an invite to join. They can then click the join icon. If they do not have speakers, they can join by phone. Click the join link, this will open the meeting application. You can then choose whether you would like to share your webcam, share your screen, or just use it as an audio conference call



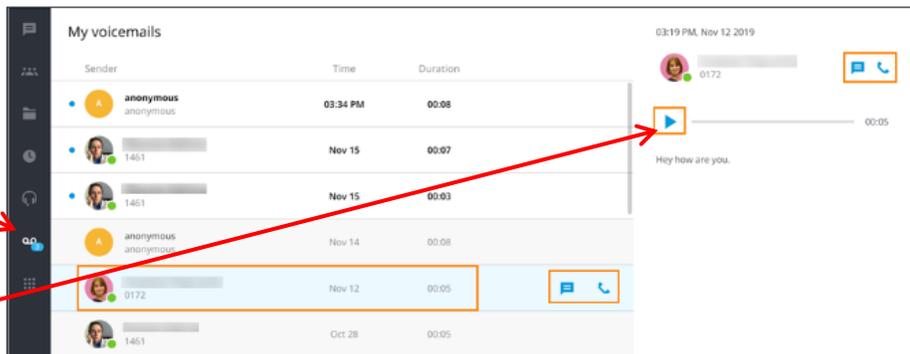
VOICEMAIL

Checking voicemails:

1. To access your voicemail, Select the voicemail icon 
2. Your voicemails will appear
3. Click on the voicemail you would like to listen to
4. Click Play

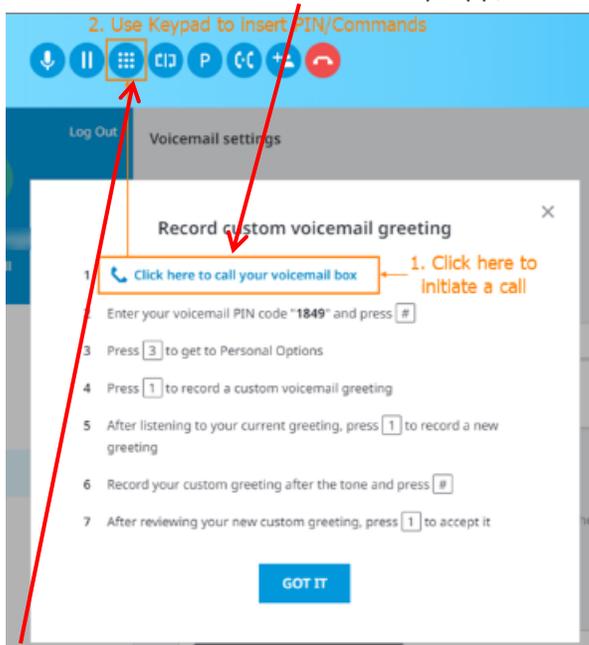
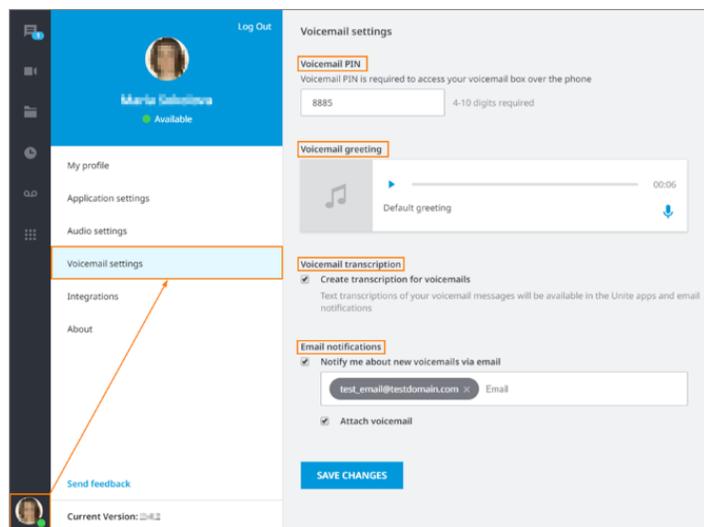
For additional listening option, please

click here: https://support.intermedia.com/app/articles/detail/a_id/17115/kw/voicemail

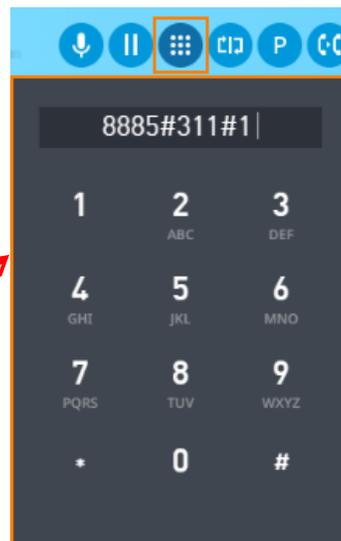


Changing Voicemail Settings, like PIN and Greeting:

1. Navigate to Settings/Profile icon
2. Click Voicemail settings
3. Change your PIN under voicemail PIN
4. Change your Greeting by clicking the microphone icon  and recording your greeting
 - a. The pop-up window with **step-by-step instruction (script)** will open
 - b. Use **Click here to call your voicemail box** to initiate a call from Elevate Desktop App;



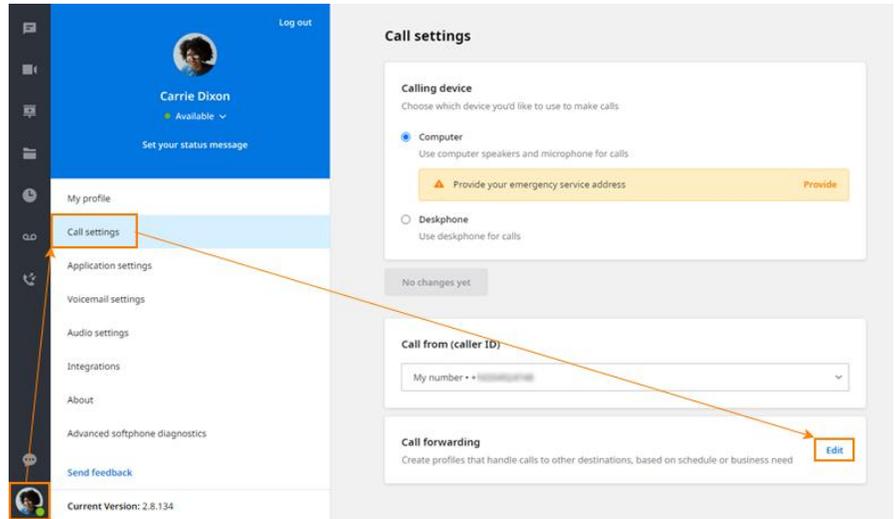
- c. Click the **Dialpad** button to open Elevate Desktop Application Dialpad;
- d. Follow voice prompts and enter your VM PIN/Commands using the Dialpad
- e. Once the greeting is recorded and saved, click the **End Call** button in Elevate Desktop Application



CALL FORWARDING

To open your Call forwarding settings in the desktop app:

1. Navigate to Settings/Profile icon
2. Select *Call settings* menu.
3. On the Call forwarding section click Edit.
4. By default, Call Forwarding has two profiles: Default and Default: Silent mode. The default profile cannot be deleted or deactivated. All incoming calls follow the default profile's settings unless a custom profile higher in the list is active and its conditions are met.
5. You can

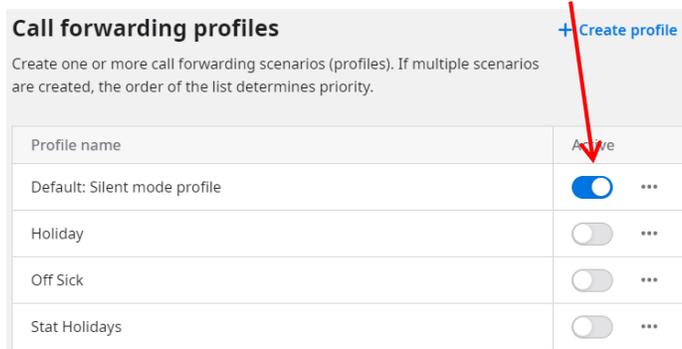
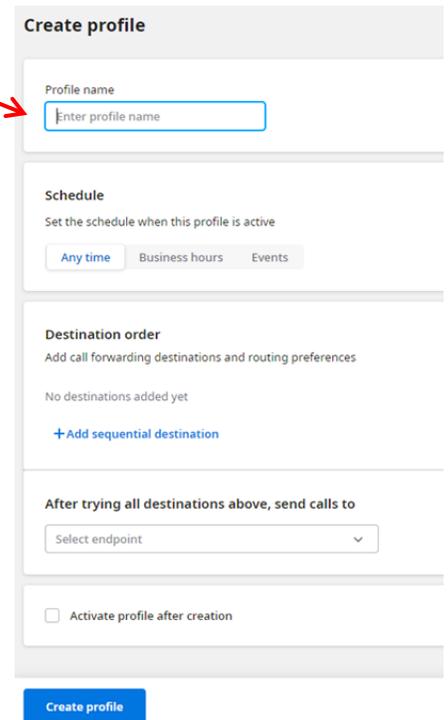


To Create a Customer profile:

1. To create a custom profile, access Call forwarding and click **+ Create profile** in the top right corner



2. Enter a profile name
3. Set up a schedule for when you would like this profile to be active. Note: The profile must be toggled on; if it's off, it will not follow the schedule.
4. Add destinations where you want the call to ring while this profile is active, such as a cell phone or another user (e.g., assistant, reception). After creating the initial destination, you can add additional ones.
5. Decide where the call should go if no destinations pick up, such as voicemail
6. Click the "Create Profile" button.
7. When you want this profile to be activated, toggle it on or off.



For more information about call forward features and instructions, visit this page:

https://support.intermedia.com/app/articles/detail/a_id/15596

PRESENCE AND CUSTOM STATUS

Presence features within Elevate help to indicate which co-workers are available for communication.

Important: Do Not Disturb/Out sick/On vacation/Off work puts all user's devices in DND mode. It will affect the app and desk phones. If Do Not Disturb/Out sick/On vacation/Off work is activated on Desktop, Mobile app will not ring either and vice versa.

Depending on the type, presence statuses could be changed manually or automatically. **Note:** statuses **Away, On break, Out sick, On vacation** and **Off work** will show how long the user has been unavailable, using a small tag: **since**. If the person is offline since yesterday or longer, it will show the date. If the date is the same, then it will show since plus the time.

Example:

Away since 8:49 AM or **On vacation** since July 5

Status Overview:

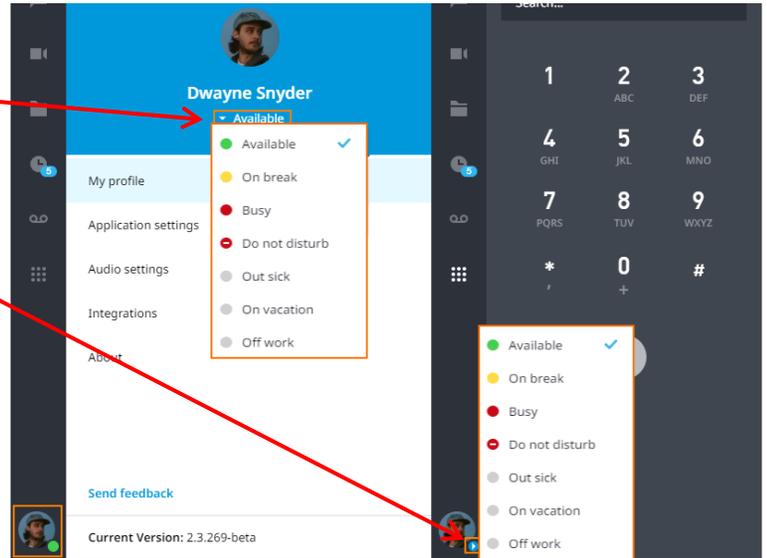
	Available	Automatically or Manually: This status indicates that a user is available to chat or talk on the phone
	Away	Automatically: When a user locks their computer or we detect no activity on the desktop for 3 min
	Busy	Manually: when a user wants to indicate to others that they are busy and may not respond right away
	On Call/Meeting	Automatically: when a user is on a call or is in a Online Meeting
	Screen sharing	Automatically: when a user is performing a screen share in the Online Meeting
	On break	Manually: when a user wants to indicate to others that they are on break and may not respond right away. If you pick up a call or participate in a meeting while being in On break status, your status will automatically change to On call/In a meeting . After the call/meeting is over, your status will change back to On break and you'll need to change it manually.
	Do not disturb	Manually: when a user doesn't want to get any notifications and send all incoming calls to voicemail More: If you are on a call or in a meeting while being in Do Not Disturb status, you can turn it off and your status will change to On a Call/In a meeting In Do Not Disturb status, missed calls counter wouldn't change even if someone calls you. You will need to go to Call History section to check if you had any. Note: in this status, calls that came through a Hunt Group would still ring to you.
	Out sick	Manually: when a user wants to notify others that he or she is unavailable due to being sick. Out sick status works in the same way as Do not disturb . When you enable the Out sick status, a notification will appear at the top of the Elevate application with a Turn Off button. Click it to change your status to Available.
	On vacation	Manually: when a user wants to notify others that he or she is unavailable due to being on vacation. On vacation status works in the same way as Do not disturb . When you enable the On vacation status, a notification will appear at the top of the Elevate application with a Turn Off button. Click it to change your status to Available.
	Off work	Manually: when a user wants to notify others that he or she is unavailable due to being off work. Off work status works in the same way as Do not disturb . When you enable the Off work status, a notification will appear at the top of the Elevate application with a Turn Off button. Click it to change your status to Available.

Changing Presence Status

1. Navigate to Settings/Profile icon
2. Click the drop-down under your name
3. Select the status you'd like active

OR

1. Click the circle next to your Profile icon
2. Select the status you'd like active

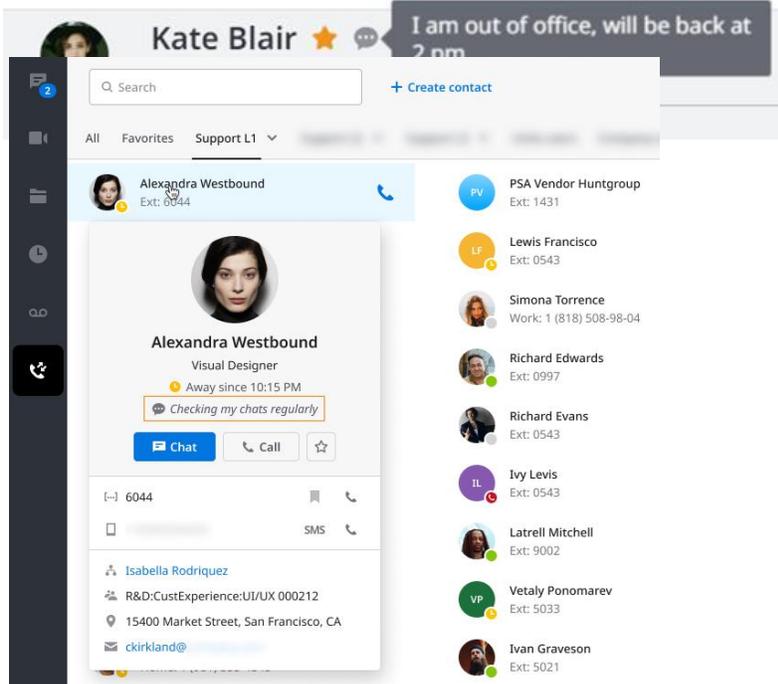
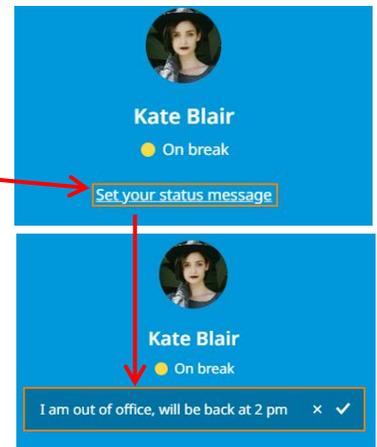


Custom Status

Custom Status gives the ability to let other users know about your availability, location or any other information you want to share.

1. Click **Set your status message**
2. Enter a message with up to 40 symbols and save that.

All other users will be able to see this custom status in the application.



MEETINGS (Online)

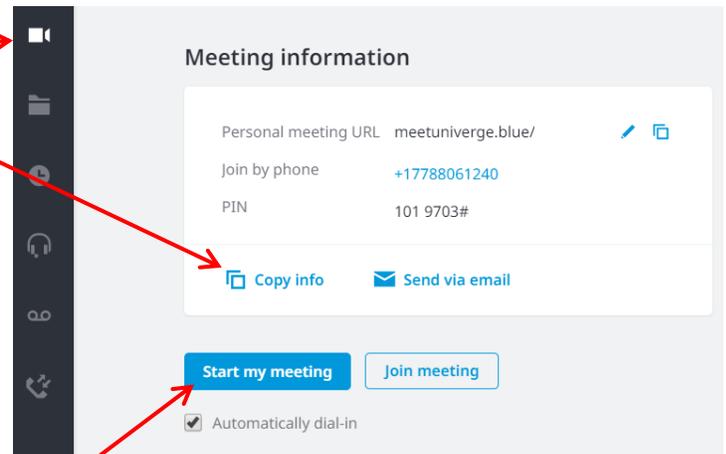
Meeting Features

- Built-in Audio Conferencing: includes a conference call number and PIN codes so participants can join by phone or computer
- 4 video participants for Essential users, 30 video participants for Pro users, and up to 200 audio participants
- Screensharing
- Lock meetings so new participants cannot join
- Record and share later (Pro or Pro Plus license required)



Meeting Invites

1. From the Meetings  screen:
 - a. Copy Info and paste that into a calendar invite or email OR
 - b. Click Send via email to have it automatically populate an email
2. From your Chat  screen:
 - a. Select the contact, then click the meet now icon. This will send them a link to click join



Start a meeting

Users can start a meeting in 2 different ways:

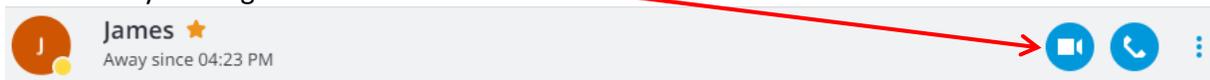
1. From the **Meetings screen** , click Start my meeting. The meeting app will launch. Follow prompts
2. At the bottom of your screen, you will then see the option to choose what you would like to share:
 - a. Webcam 
 - b. Share your computer screen  or
 - c. Simply on audio 



Note: If you do not have computer audio, you will need to join by phone as well.

OR

3. **From the Chat screen** 
 - a. From the Chat screen, you can start a meeting with members of a one-on-one or team chat by clicking on the 'Meet Now' button



Note: If you do not have computer audio, you will need to join by phone as well.

Lock a Meeting (Only applicable with Pro license)

When all your participants have joined the meeting, you can lock the meeting so no one can join afterward.

1. To do so, click the lock  icon at the top of the screen.

Record a Meeting (Only applicable with Pro license)

1. To record the meeting, click the Record icon . When the meeting is being recorded, the icon will be red 

End/Leave the Meeting

1. Click the Exit icon 
2. You will be given the option to:

CANCEL
LEAVE
END FOR ALL

CONFERENCE CALLING

DESKPHONE MODE – Uses your desk phone to make/answer calls

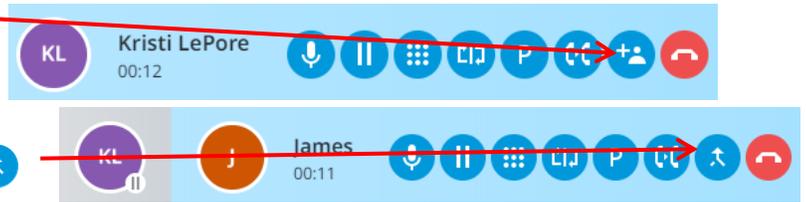
Using your desk phone, add a third person to any active call:

1. Start a regular call with one of your contacts or any external number
2. Press the Conference key on the display of your desk phone
3. Call the next person you would like to conference in
4. Once the call is connected, press the Conference key again
5. To end confer, hang up

COMPUTER MODE – Uses your computer to make/answer calls

Using your computer, add a third person to any active call:

1. Start a regular call with one of your contacts or any external number
2. Click 'Add Call'  on the active bar
3. Select a contact to add to the call or enter a number to call
4. The first call will be put on hold.
5. To start a 3-way call click 'Merge Calls' 



INTEGRATIONS

Manage integrations



Microsoft Outlook Integration

Click-to-call, click-to-chat, and view presence of Elevate contacts directly within Outlook. Features vary based on your license. [Learn more](#)



CRM Screen Pops

Connect 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. [Learn more](#)

Save changes

More integrations



Elevate Chrome Extension

Click-to-call phone numbers on any web page, start meetings from chrome browser, and more. Features vary based on your license. [Learn more](#) [Download](#)



Sync Contacts

Sync your contacts from third-party platforms (Google, Microsoft 365, Exchange, etc.) across your Elevate desktop and mobile apps. [Learn more](#)

Enabling Integrations

1. Click your presence icon  in the bottom left corner of your display.
2. Select Integrations
3. Select the integrations you would like to enable
4. Click Save changes

MOBILE APP

The Elevate Mobile App transforms a mobile phone into an essential collaboration tool, making teamwork on-the-go easier than ever. Users can see who is available, send and receive team chats and messages, place calls, and see voicemails all from one application—anytime, anywhere.

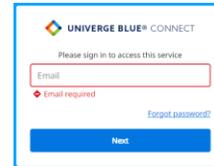


INSTALLATION

The Elevate UC app is available for Android and IOS devices. Visit the [app store](#), search, and download “Elevate UC ”

LOGIN

1. Log in to your mobile app using your email address and the password you created when you set up your desktop. If you are not sure what your password is, follow the link for ‘Forgot Password’



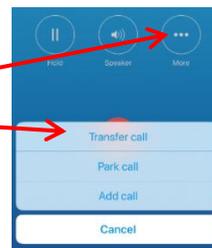
IMPORTANT: When logging into the app for the first time, you will be prompted to allow certain features. Ensure you allow Notifications and Microphone access. If you allow contact sync, all your cell phone contacts will be imported to the mobile app and listed under the Contacts icon and on your computer app under personal contacts. If you don't need to call personal contacts from your work phone, choose not to sync. To disable contact sync later, go to your cell phone settings, find Blue Connect, and toggle Contacts off.

PLACING A CALL

1. Click the Dialpad icon 
2. OR Navigate to your Contacts tab, History tab, or Voicemail tab and click the call icon next to the number you'd like to dial

TRANSFER

1. With an active call, press the More icon 
2. Press Transfer call
3. Your keypad will come up, you can either dial the extension or click Hide to remove the keypad and select from the contact list

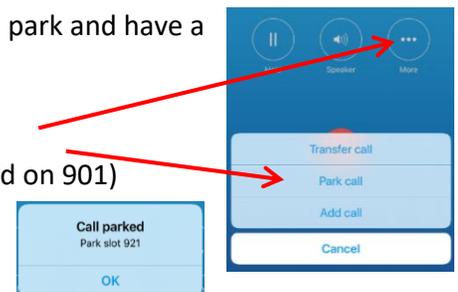


CALL PARKING

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

1. With an active call, press the More icon 
2. Select Park call
3. The system will tell you which extension the call is parked on (ex. Parked on 901)
4. Contact co-worker and advise them to “Pick up Park “901”

To pick up the call: Using the Dial pad, enter the park number, then click Send or Lift desk phone handset (or press Speaker), dial the park number

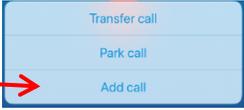


CALL FLIP

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  icon
2. The call will be placed on hold and all other assigned devices will start ringing
3. Pick up the call and continue the conversation on the new device

CONFERENCE CALLING

4. With an active call, press the More icon 
5. Select Add Call 
6. Select Contact to add or use the Dial pad to enter a new number
7. Your first caller will be put on hold while your phone calls the second contact. Once the contact answers press the More icon again, then select 'Make conference'



CALL HISTORY

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

1. To review your call History, navigate to your History tab located at the bottom of your screen

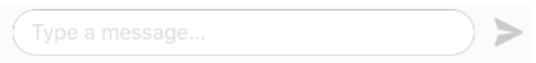


TEAM CHAT

1. To create a Chat with one of your coworkers, navigate to your Chat tab



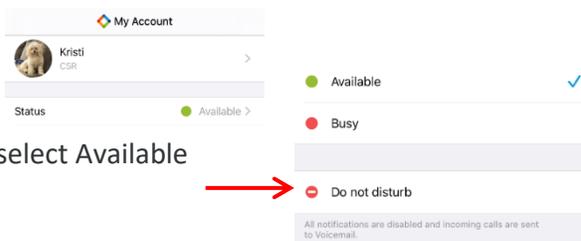
2. Continue a previously started chat or to begin a new chat, click the + icon in the top right of your screen and select your contact
3. You can attach an item to your chat message as well 



DO NOT DISTURB

Putting your phone on Do Not Disturb will send calls directly to voicemail during this time so you are not interrupted in a meeting

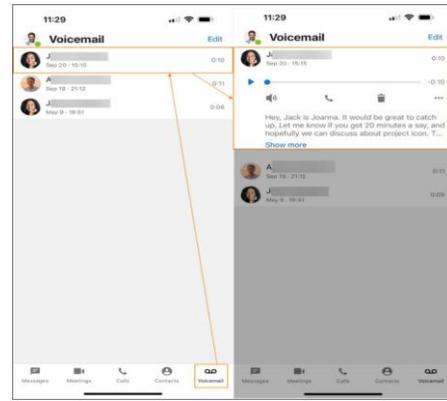
1. Navigate to 'My Account' 
 2. Select Status 
 3. Select Do Not Disturb
- To Remove:** Follow steps 1 – 2, then select Available



VOICEMAIL

LISTENING TO VOICEMAILS

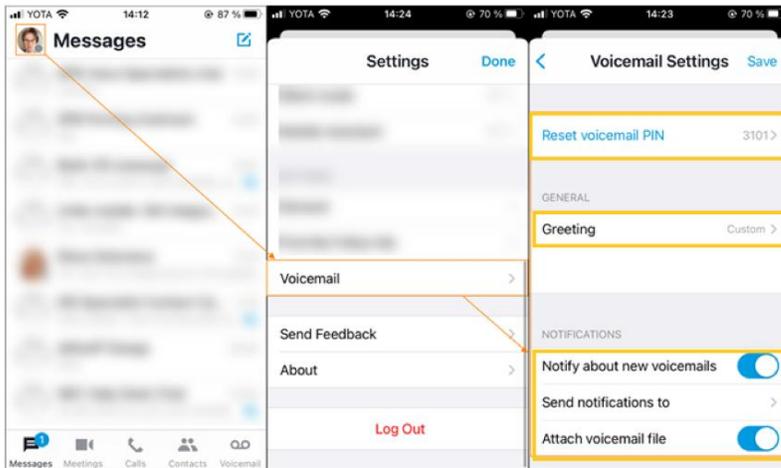
1. To access your Voicemail, navigate to the **Voicemail** button
2. You will see your voicemails listed, select the voicemail to listen to it



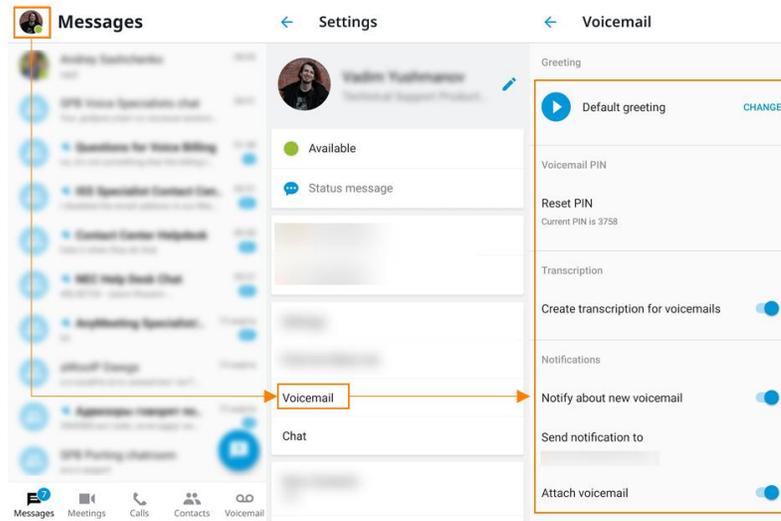
VOICEMAIL SETTINGS

Including updating your PIN, changing your Greeting and notifications

iOS:



Android:



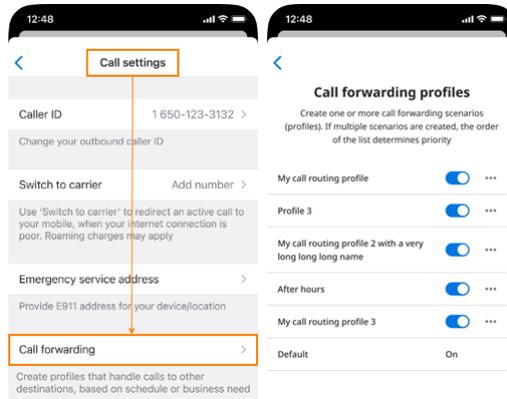
For more guides on how to access and change your voicemail, Ctrl+Click the following guides:

- [Elevate Mobile Apps](#)
- [Elevate Mobile App: Checking New Voicemail](#)
- [Elevate Mobile App: Record Voicemail Greeting](#)
- [Elevate Mobile App: Account Settings](#)

CALL FORWARDING

To open your Call forwarding settings in the mobile app:

1. Tap your profile picture.
2. Select Call settings > Call forwarding.
3. Turn On/Off the profile



SILENT MODE

Silent mode is the tool for users who don't want to be disturbed during the night or on the vacation with calls, voicemails, messages, and missed call notifications coming to work numbers.

To enable Silent Mode:

1. Navigate to **My Account** (your profile picture).
2. Select **Silent Mode** > click **Enable** for Silent Mode.

3. Set **Schedule** to specify the time when the notifications should be disabled and enabled automatically. Silent mode will be turned on at the chosen day in **Repeat** at the **Start Time**, notifications from **Events** will be suppressed until the **End time**.
Notes:

- It only affects events that are coming via the mobile application. Calls coming via cellphone (SIM card) are not affected.
- Call Forwarding rules will remain intact.
- User Presence indication will remain intact.
- Silent mode works per device. The other devices are not affected when the feature is enabled on one of the phones.

