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INSTALLATION/OVERVIEW

The Elevate Desktop and Mobile Apps offer calling, Business SMS, video conferencing, file sharing, and much more directly from your computer or mobile device. Download the Elevate Apps here:

<u>https://serverdata.net/elevateapps/</u>OR, if you are using the Teams application, your IT will need to first set up the Teams integration. Then, you can add it to your Teams application by following these instructions: https://support.serverdata.net/app/articles/detail/a_id/29072/kw/teams

LOG IN

Once installed, login using the following credentials:

- Username: Your email address
- Password: [As provided by NATG]
- Click SIGN IN
- You will be prompted to change your password

<u>Note</u>: if you have forgotten your password, simply click "Forgot Password?", you will be sent an email with instructions on how to reset it

When logging in, you have two options:

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.

My profile

Call settings

Hunt groups

Application settings

Voicemail settings

Audio settings

Kristi

Available

Set your status message

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To choose Deskphone mode:

- 1. Navigate to the Settings/Profile icon
- 2. Click Call Settings -
- 3. Select Deskphone
- 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

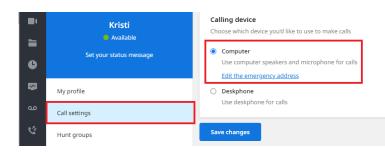
NOTE: It's recommended to enable

"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.

Current Version: 2.9.98

To choose the Computer mode:

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



Calling device

Computer

Deskphone

Device

Use deskphone for calls

NEC DT900S 32LCGS

Auto off-hook mai

Save changes

Auto off-hook for outgoing calls

call via the app. Learn more

Choose which device you'd like to use to make calls

Use computer speakers and microphone for calls





PLACING A CALL

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

- 1. Through the computer application:
 - a. Click the Calling icon 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

- You can place a call using the Dialpad or by clicking on the 'Call' button in your call history 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

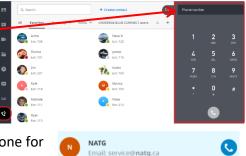
If you are in Deskphone mode, you will need to use your deskphone to press Hold. The call will be
placed on hold on your personal line and will flash green. To retrieve the call, you will press the
flashing green light.

Computer Mode – Uses your computer to make/answer calls

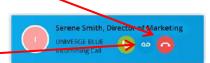
- If you are in Computer mode, you will press the Hold key on your computer app.
- To retrieve the call, press the Play/Resume key











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

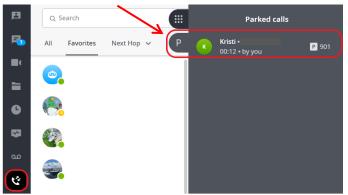
- 1. While on an active call, Press the P (park) icon
- 2. The system will announce the park number
- 3. Call the employee and let them know the park number to pick up.



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 S. 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 👀

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

lames

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 🖽 button
- 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 \bigcirc 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. SMS **SMS** icon (for external number, if Application must have a Pro license)





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VOICEMAIL

Checking voicemails:

- To access your voicemail, Select the voicemail icon
- 2. Your voicemails will appear
- 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

My voicemails

Time

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Nov 15

Nov 15

Nov 14

Nov 12

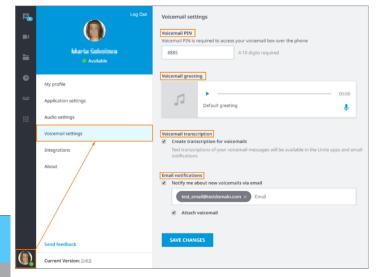
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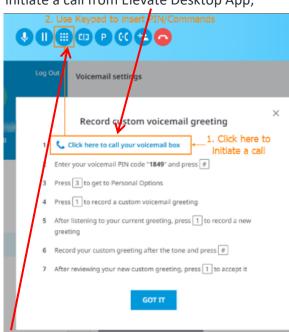
Changing Voicemail Settings, like PIN and Greeting:

- 1. Navigate to Settings/Profile icon
- 2. Click Voicemail settings
- 3. Change your PIN under voicemail PIN
- 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;



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- 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

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4 бні	5 JKL	6 мNO
7 PQRS	8 TUV	9 wxyz
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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.

ß	Log out	Call settings
=	S	Calling device
單	Carrie Dixon Available 🗸	Choose which device you'd like to use to make calls
=	Set your status message	Computer Use computer speakers and microphone for calls
0	My profile	Provide your emergency service address Provide
۵۵	Call settings	O Deskphone Use deskphone for calls
ų	Application settings	No changes yet
	Voicemail settings	
	Audio settings	Call from (caller ID)
	Integrations	My number • •
	About	
I	Advanced softphone diagnostics	Call forwarding
7	Send feedback	Create profiles that handle calls to other destinations, based on schedule or business need
	Current Version: 2.8.134	

5. You can

To Creatue a Customer profile:

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

		ding profiles e call forwarding scenarios (profiles). If multiple scenarios are created, the order of the list determines p	+ Create profile	
	Profile name		Active	
	Default		On	Create profile
2.	Enter a p	rofile name		
3.	Set up a s	schedule for when you would like this profile to	be active. 🔪	Profile name Enter profile name
	Note: The schedule	e profile must be toggled on; if it's off, it will no	t follow the	Euros huome neuros
4.	Add dest	inations where you want the call to ring while t	his profile is:	Schedule Set the schedule when this profile is active
	active, su	ich as a cell phone or another user (e.g., assista	int,	Any time Business hours Events
	receptior	n). After creating the initial destination, you car	n add	Any unite Dusiness nours Events
	additiona	Il ones.		
5.		here the call should go if no destinations pick u	ip, such as	Destination order Add call forwarding destinations and routing preferences
_	voicemai	•		No destinations added yet
6.		"Create Profile" button.		+ Add sequential destination
7.	When yo	u want this profile to be activated, toggle it on	or off.	
		Call forwarding profiles	+ Create profile	After trying all destinations above, send calls to
		Create one or more call forwarding scenarios (profiles). If multiple scenarios are created, the order of the list determines priority.		Select endpoint V
		Profile name	Active	Activate profile after creation
		Default: Silent mode profile	• •••	

Off Sick Stat Holidays For more information about call forward features and instructions, visit this page: https://support.intermedia.com/app/articles/detail/a id/15596

Holiday



Create profile

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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
	Available	talk on the phone
	A	Automatically: When a user locks their computer or we detect no activity on the
-	Away	desktop for 3 min
	Busy	Manually: when a user wants to indicate to others that they are busy and may not
	Busy	respond right away
0	On Call/Meeting	Automatically: when a user is on a call or is in a Online Meeting
θ	Screen sharing	Automatically: when a user is performing a screen share in the Online Meeting
		Manually: when a user wants to indicate to others that they are on break and may
		not respond right away.
6	On break	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.
		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
	Do not disturb	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.
		Manually: when a user wants to notify others that he or she is unavailable due to
		being sick.
	Out 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.
		Manually: when a user wants to notify others that he or she is unavailable due to
		being on vacation.
	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.
		Manually: when a user wants to notify others that he or she is unavailable due to
		being off work.
	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.
		interest opprovident and a serie of outcome of out the offend of the added

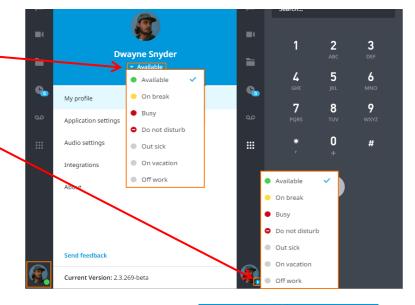


Changing Presence Status

- 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

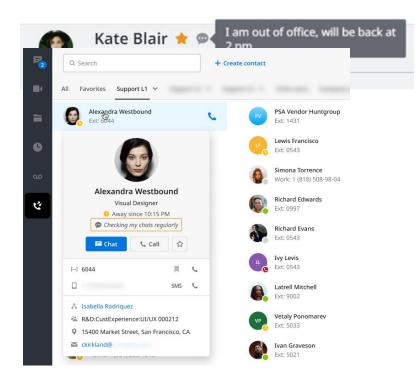


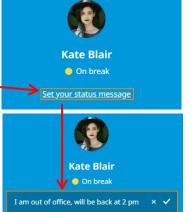
Custom Status

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.







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
¥ E	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		
Ó	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
6	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



Park call

Cancel

Call parked

ок

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 SMS, 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

- 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)
- 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.

Fransfer call

Park call

Add call

- 1. While on an active call, press the Flip (1) 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

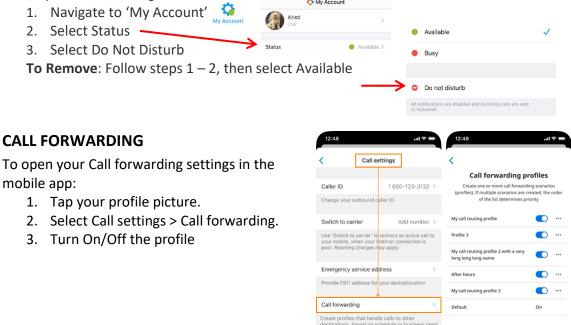
The Call History tab shows a list of all your past calls, making it easy to return missed calls and see logs of previously made calls.

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



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





VOICEMAIL

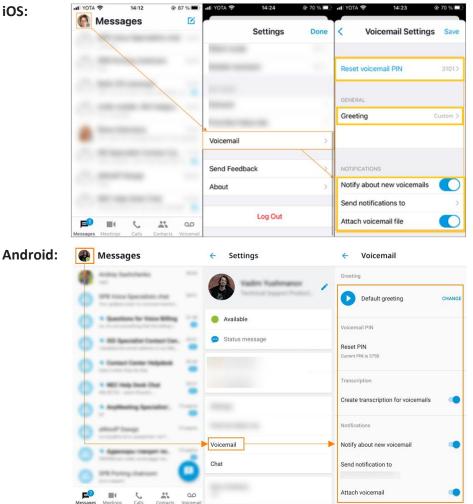
LISTENING TO VOICEMAILS

- 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



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
- <u>Elevate Mobile App: Record Voicemail Greeting</u>
- Elevate Mobile App: Account Settings



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).
- Select Silent Mode > click Enable for Silent
- Mode.
 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.

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		🔶 💠 Silent mode		Silent mode	
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