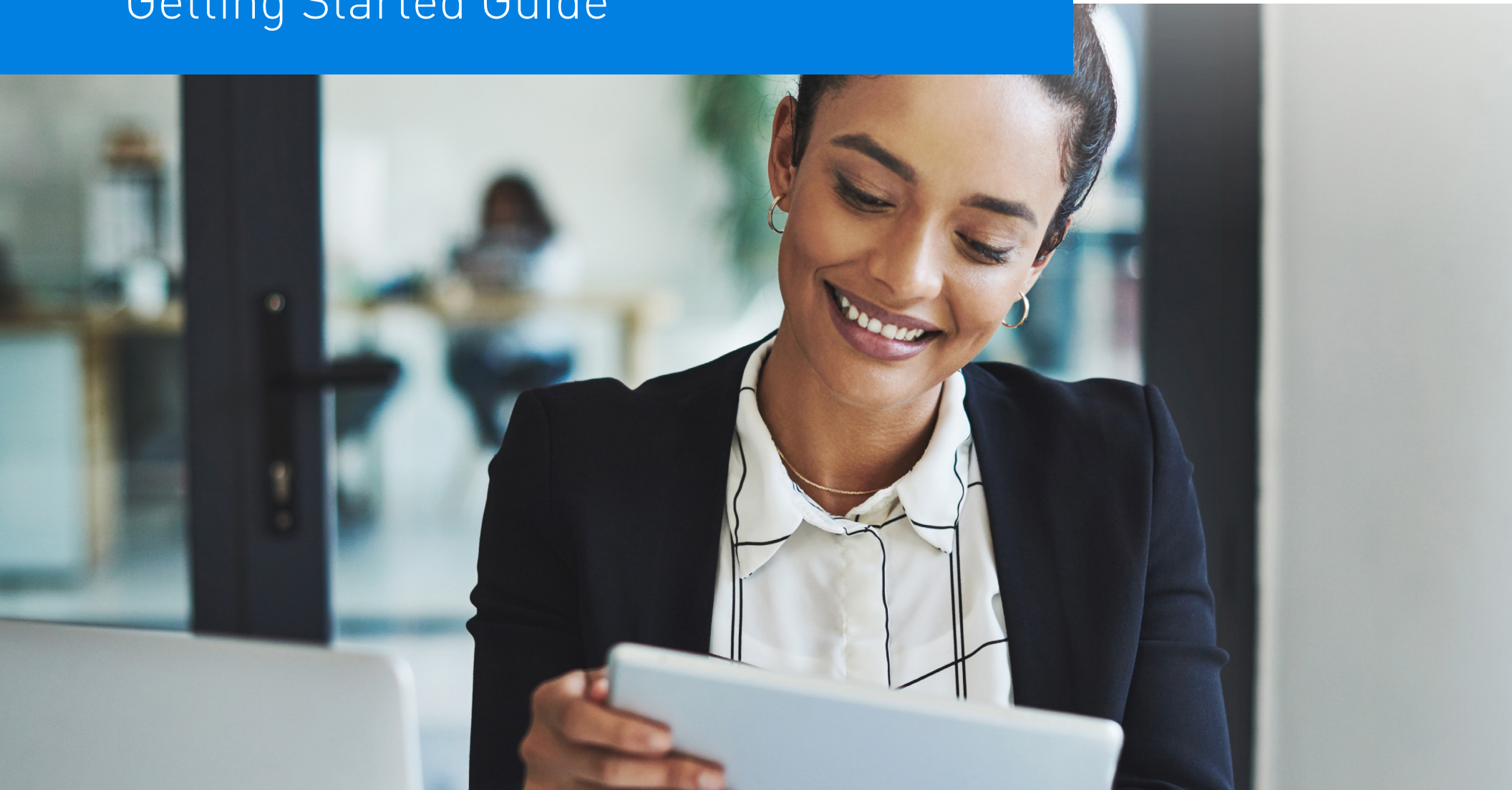Pala IT

Elevate For Teams Advanced
Getting Started Guide

Elevate For Teams Advanced Quick Start Guide

New to Elevate For Teams Advanced? Read this guide to learn the basics.

Collaborate in Teams
Collaborate in Microsoft Teams using the Chat, Meetings and File sharing tabs.

Company Messaging
Use an assigned company phone number to receive and send SMS from that number

SMS
Use SMS for sending and receiving one personal message at a time between two users

Call History
View your call history including all call activity or missed calls

Chat
Use chat to instantly connect and stay engaged anywhere, anytime in real time

Meetings
Start, schedule, or view upcoming meetings

Files
Access, share, and manage files in real-time

Communicate in Elevate
All cloud communications are handled via the Elevate tab in the Teams desktop application.

Voicemails
Manage, playback, or view voicemail transcriptions

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

Advanced Hunt Groups
View and manage Advanced Hunt Groups

Incoming Calls
The Elevate Teams Desktop Plugin will pop-up to show an incoming call which you can choose to answer, send to voicemail, or ignore.

Installation

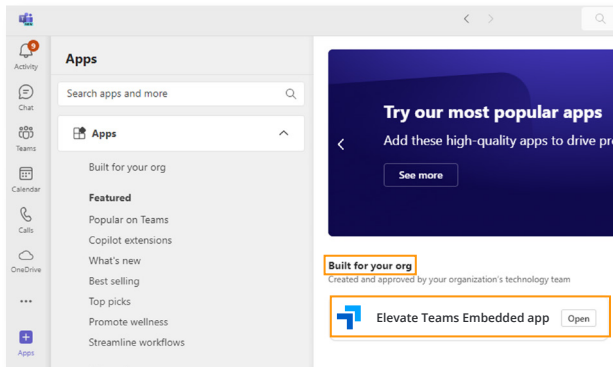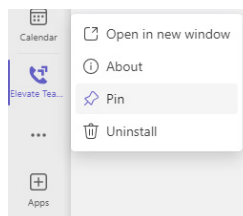Elevate For Teams Advanced
is easy to install.

Sign In

STEP 1:

Log in to Microsoft Teams and select the **Apps** option in the sidebar
to open the Teams app store.

- Under the Built for your Org section, click the 'Open' button
  for the Elevate Teams Embedded App.

- Right-click on the Elevate Teams
  Embedded App icon on the sidebar
  and select Pin to ensure that the
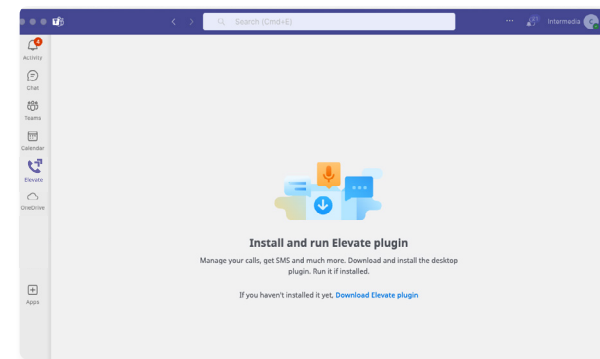 App always remains visible on the
  Teams sidebar.

STEP 2:

Once the Elevate Teams Embedded app is installed, log in using
your Elevate credentials.

STEP 3:

Download the Elevate Teams Desktop Plugin installer by
clicking on the download link in the Unite Teams Embedded
App. Launch the installer and accept the license terms.

You can now begin using your Elevate For Teams
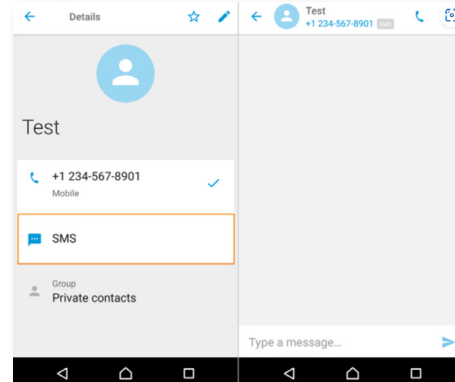Advanced license in the embedded Teams app.

SMS for Elevate Teams Embedded Desktop App

Sending SMS

SMS is a 1-1 communication that can be sent two different ways from the Desktop app.
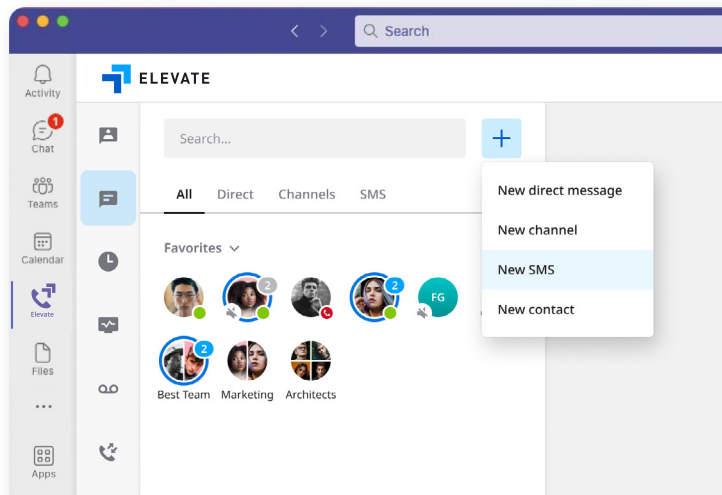
From a Contact Card

An option to send SMS is available in Contact Card. Search for a person or choose from your Favorites and select SMS to start writing your message.
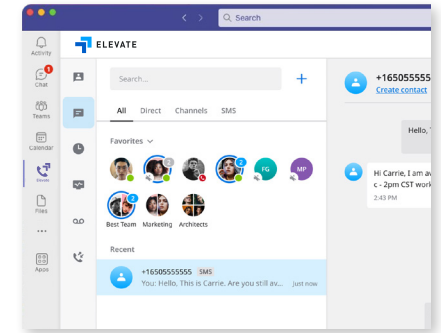
From New SMS

Simply select the + icon to create a New SMS. You can also choose an existing SMS chat which will have a grey SMS note on top.

Receiving SMS

Received SMS messages look almost like received chat messages. Once you receive a new SMS, it will pop up under the Chat section with a sign SMS next to it.

You will also receive a Missed message from notification, just like you do with chat messages
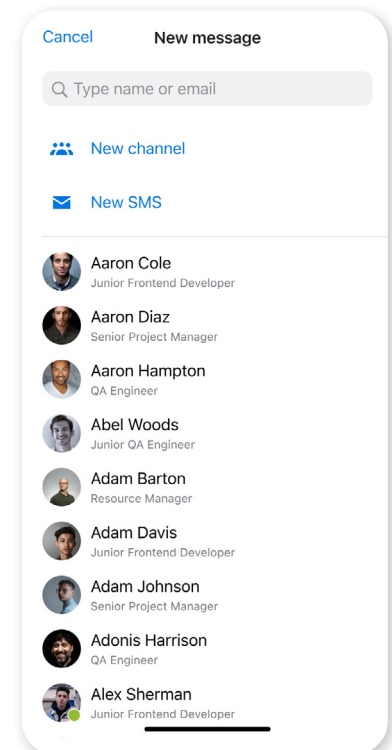
SMS for Elevate Mobile App

Sending SMS

Navigate to the New Message section. Choose New SMS and enter a 10-digit number or search contacts for the destination. All contacts having phone numbers outside your organization (private or corporate) will be displayed.

Then type the text and click Send icon. You can also choose an existing SMS chat which will have a grey SMS note on top.

Calling

Place, receive and manage calls in two ways:

- **Computer:** Use computer speakers and microphone for calls (can use Bluetooth headset or headphones)

- **Deskphone:** Use hardware (desk phone) for calls (Call Controller mode available in Q4 2024)

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
Computer	●	●	●	●	●	●	●	●	●	●
Desk-phone	●	Desk Phone	●	Desk Phone	Desk Phone	Desk Phone	●	●	●	●

Call settings

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

◉ Computer
Use computer speakers and microphone for calls
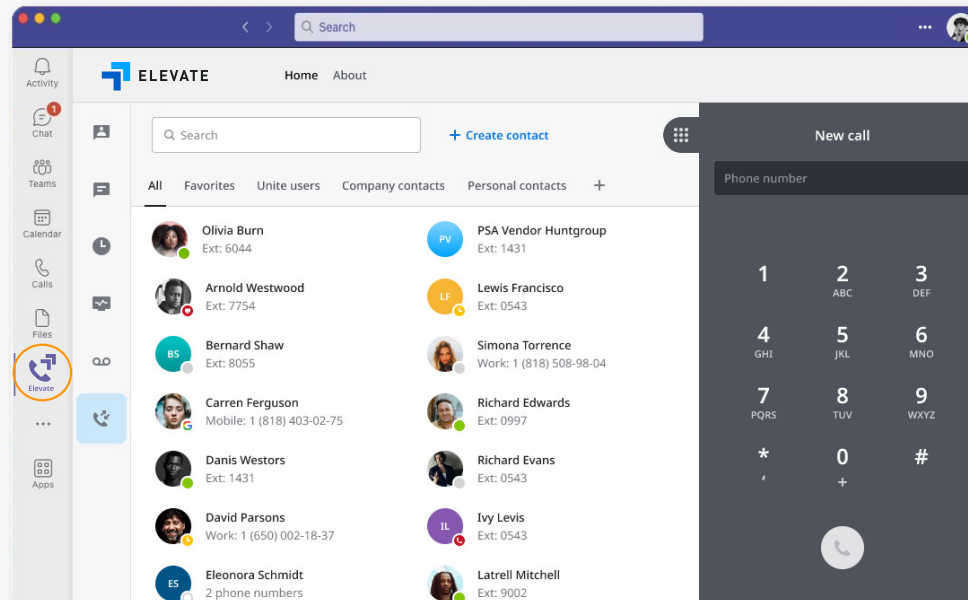Edit the emergency address

○ Deskphone
Use deskphone for calls

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.

Elevate Mobile App
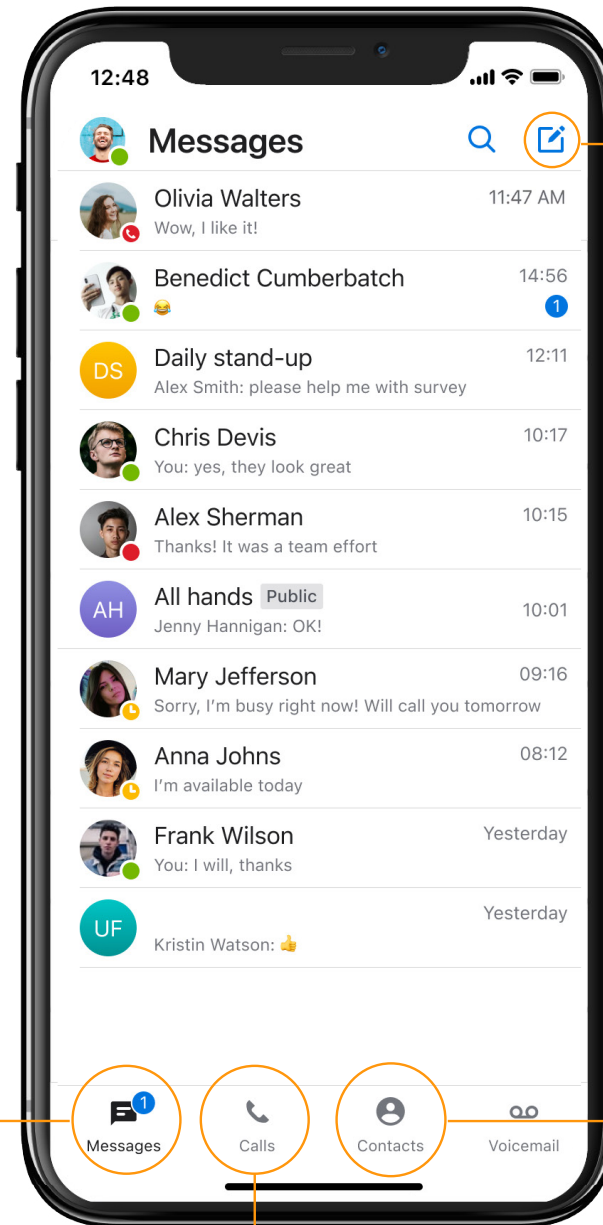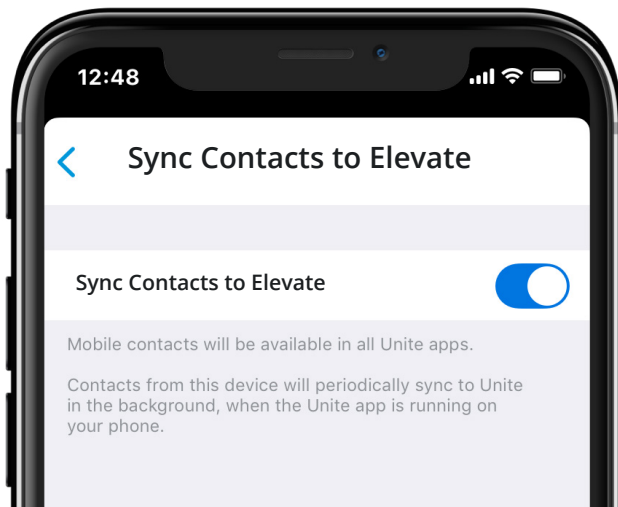
Take your work with you, wherever you go

Call and send/receive SMS 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 Teams Embedded desktop and mobile applications.

12:48

‹ Sync Contacts to Elevate

Sync Contacts to Elevate

Mobile contacts will be available in all Unite apps.

Contacts from this device will periodically sync to Unite in the background, when the Unite app is running on your phone.

12:48

Messages 🔍

Olivia Walters — 11:47 AM
Wow, I like it!

Benedict Cumberbatch — 14:56
😂 — 1

Daily stand-up — 12:11
DS — Alex Smith: please help me with survey

Chris Devis — 10:17
You: yes, they look great

Alex Sherman — 10:15
Thanks! It was a team effort

All hands Public — 10:01
AH — Jenny Hannigan: OK!

Mary Jefferson — 09:16
Sorry, I'm busy right now! Will call you tomorrow

Anna Johns — 08:12
I'm available today

Frank Wilson — Yesterday
You: I will, thanks

UF — Yesterday
Kristin Watson: 👍

Messages | Calls | Contacts | Voicemail

Start new messages
Create a new direct, channel or SMS message*

Contacts
View all company and personal contacts

Messaging
Communicate in real-time with Direct and Channel messaging

Calls
Use your business phone number to place, receive and manage calls

*Business SMS must be enabled by admin. Business SMS is only available in North America.

Next Steps

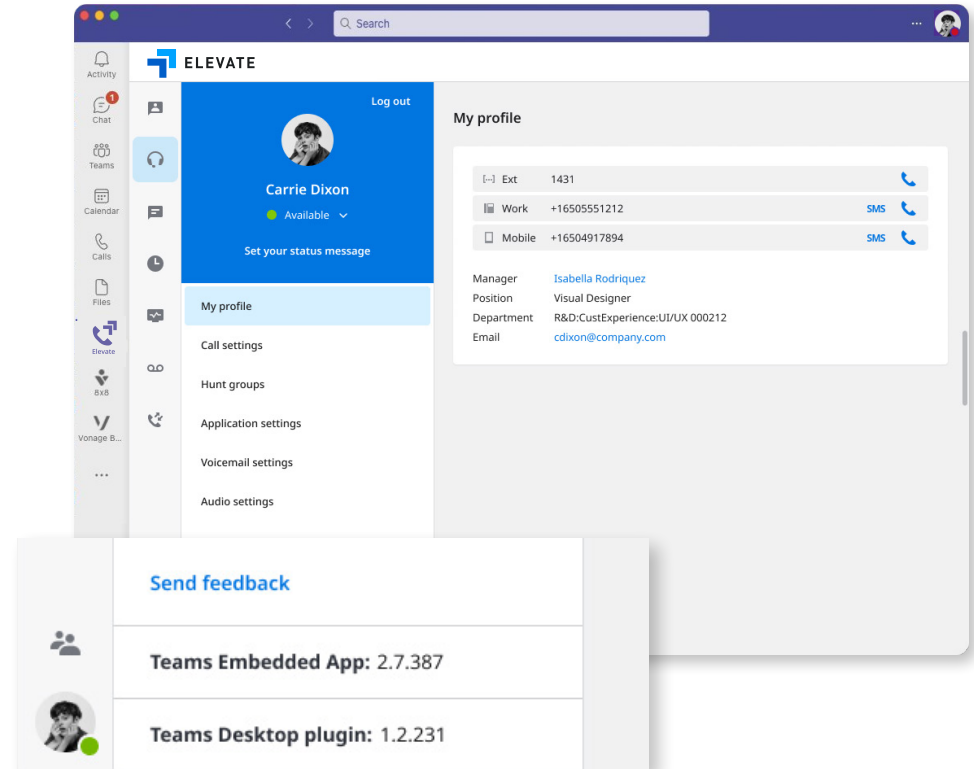## Want to learn more?
Join our weekly live training session:

Send us your feedback:
Are you enjoying Elevate?
Is there room for improvement? Let us know!

QUESTIONS? CONTACT US TODAY!

Pala IT

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