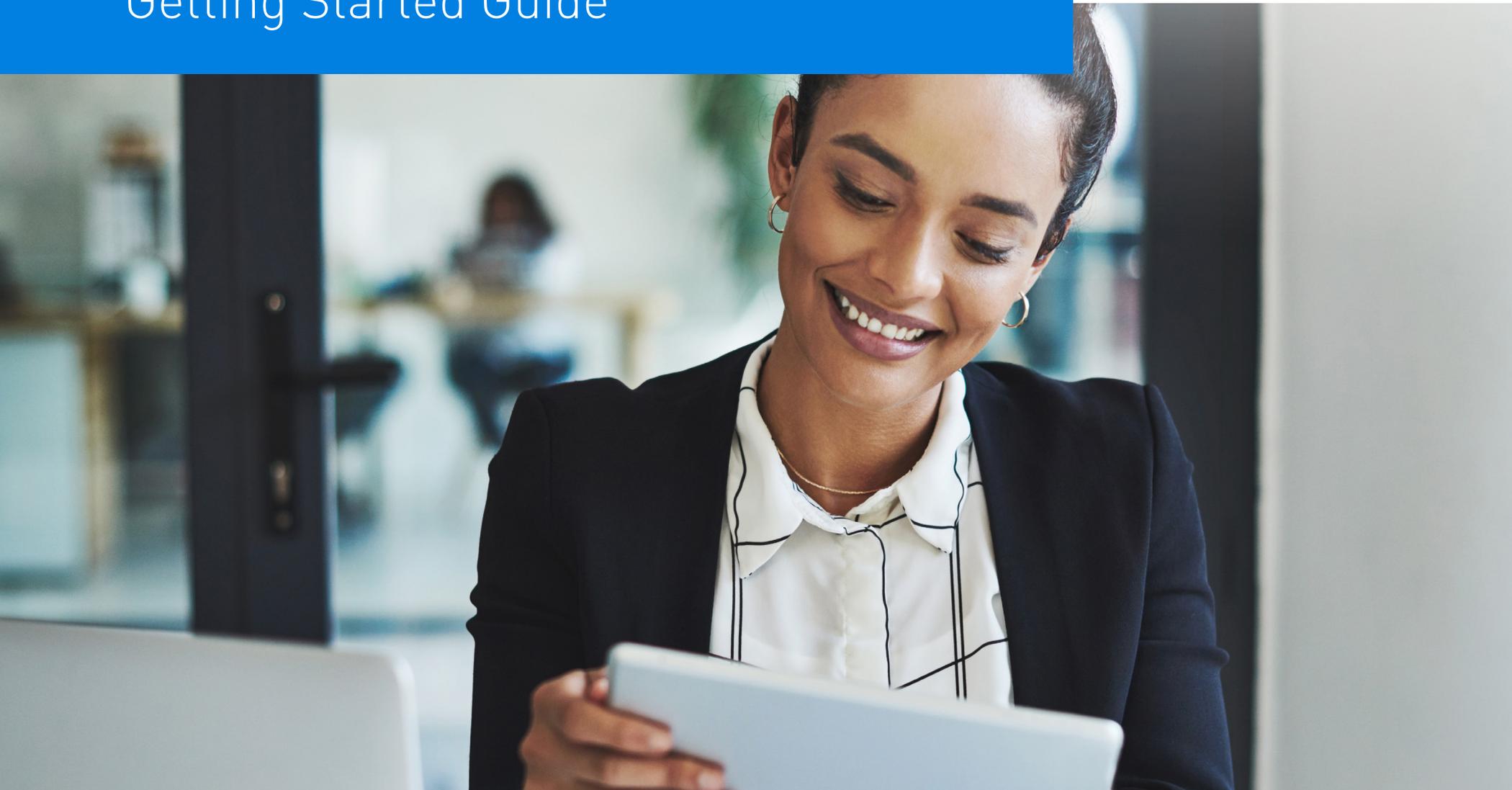


# Elevate For Teams Advanced Getting Started Guide



# 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.

### 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

### Company Messaging

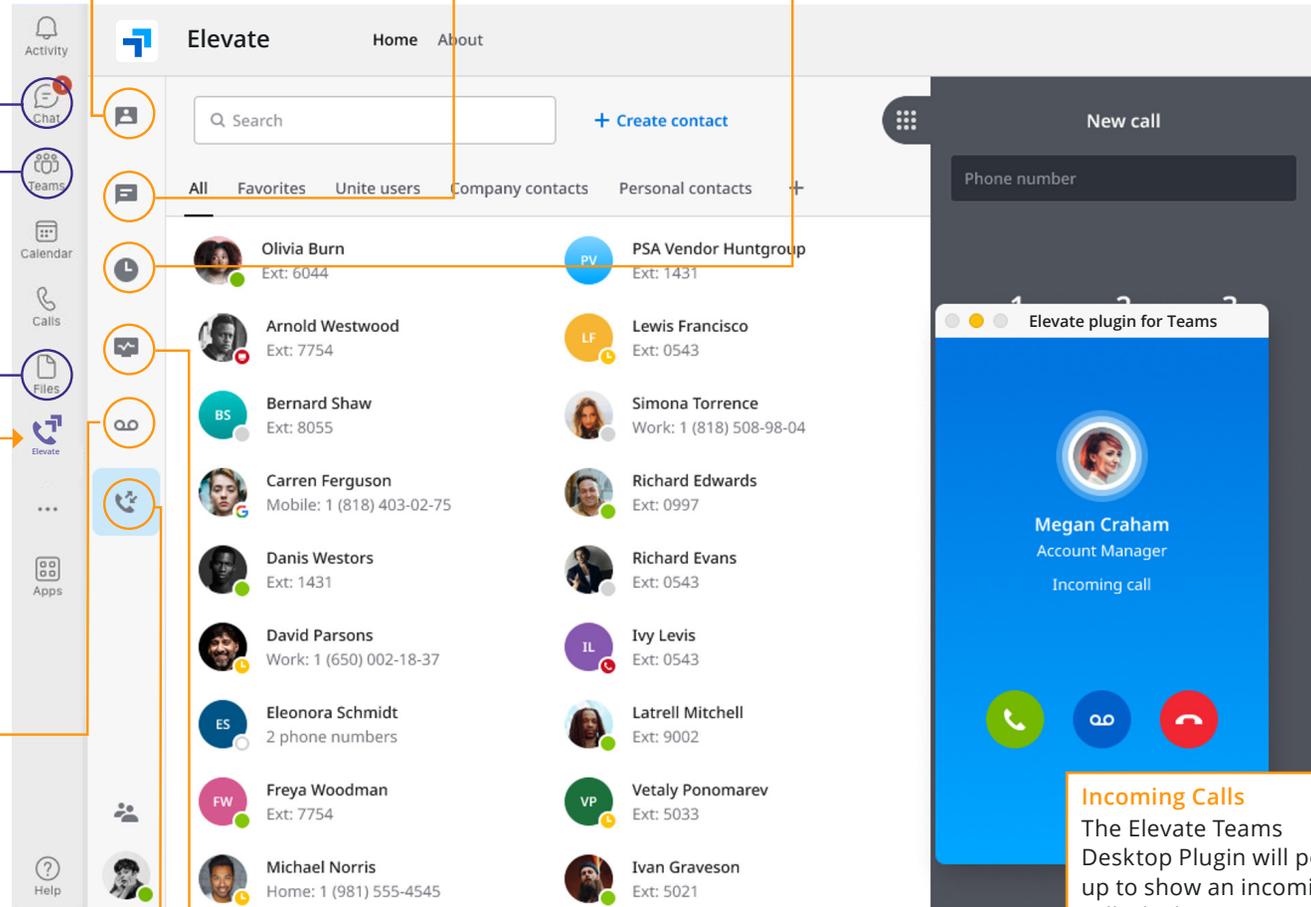
Use an assigned company phone number to receive and send SMS from that number

### 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



### 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

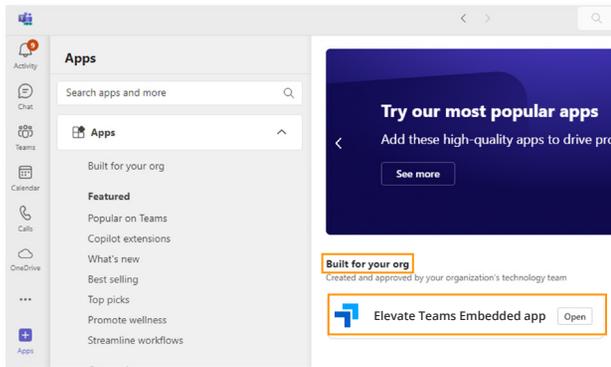
Elevate For Teams Advanced is easy to install.

## Sign In

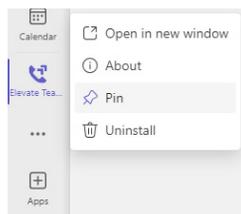
### STEP 1:

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.



Get the Elevate mobile app here.

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

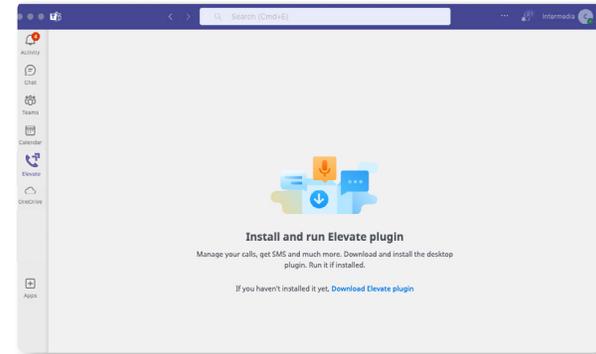


### STEP 2:

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.

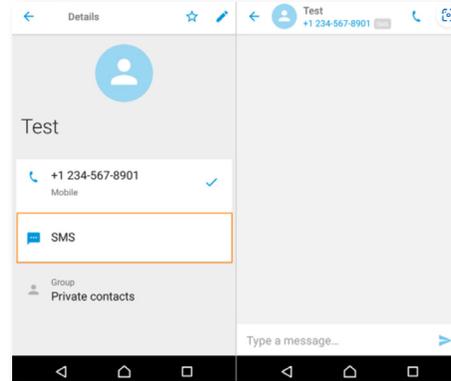
# SMS for Elevate Teams Embedded Desktop App

## Sending SMS

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

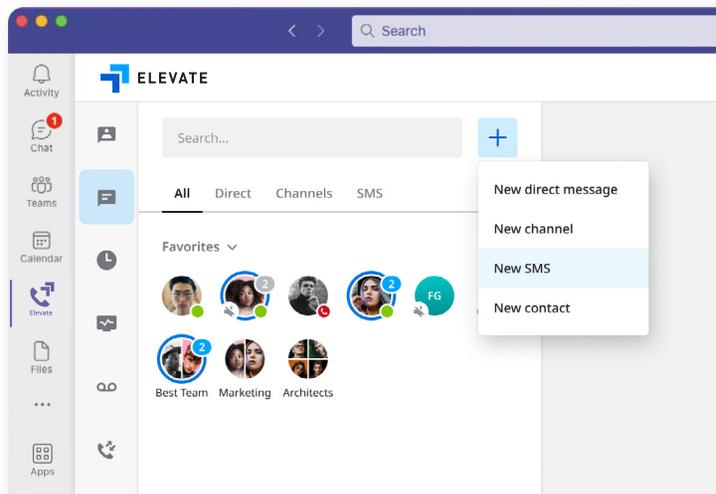
### From a Contact Card

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

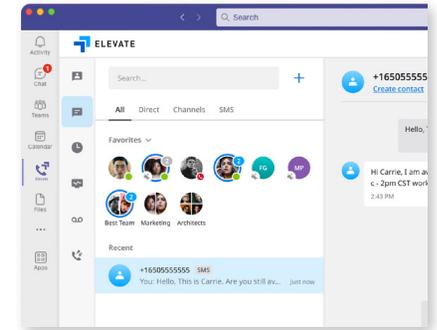
Simply select the + icon to create a New SMS. You can also choose an existing SMS chat which will have a grey SMS note on top.



## 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

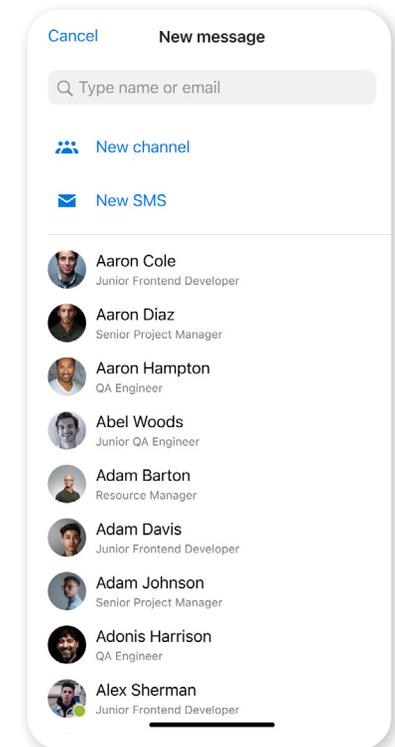


# SMS for Elevate Mobile App

## 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.



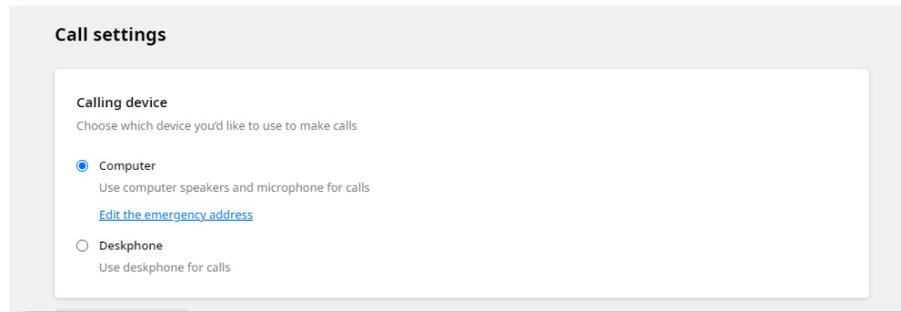
# Calling

## 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)

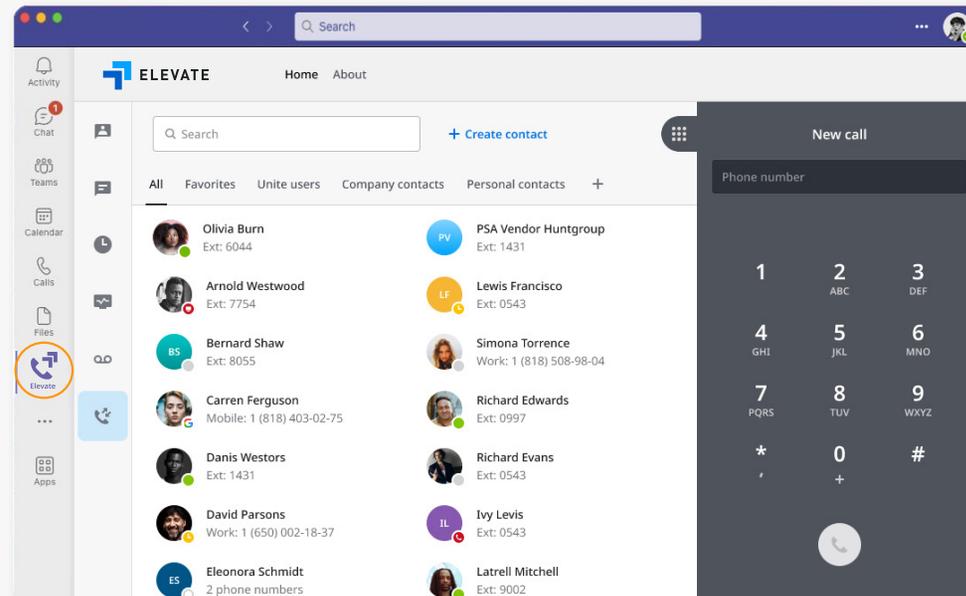
## Calling features vary based on calling mode.

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	●	●	●	●



## 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

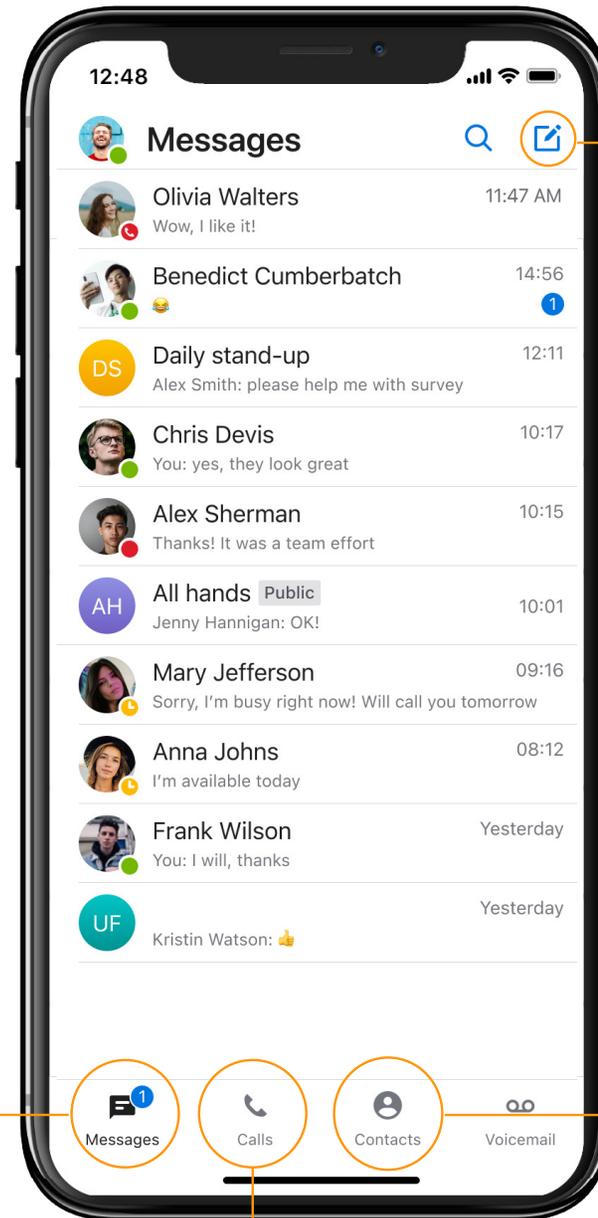
Call and send/receive SMS from your mobile device with the Elevate mobile application.



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.



**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

**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:



**ELEVATE**

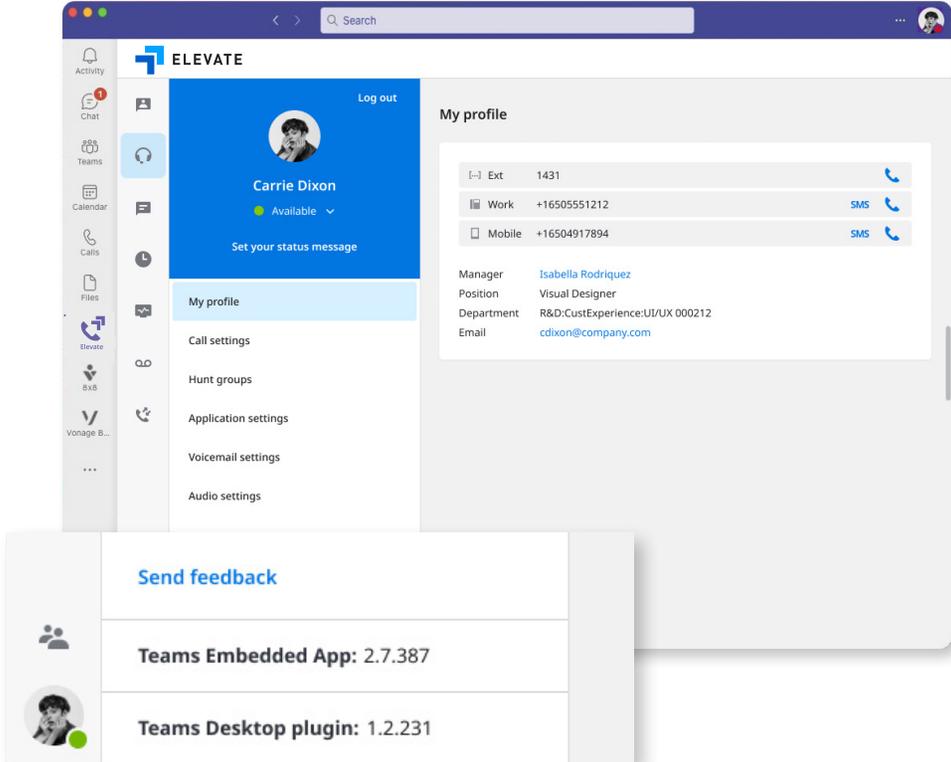
**ELEVATE APPS  
LIVE TRAINING**

**REGISTER TODAY!**

## Send us your feedback:

Are you enjoying Elevate?

Is there room for improvement? Let us know!



**ELEVATE**

Carrie Dixon  
Available

My profile

- Ext: 1431
- Work: +16505551212
- Mobile: +16504917894
- Manager: Isabella Rodriguez
- Position: Visual Designer
- Department: R&D:CustExperience:UI/UX 000212
- Email: cdixon@company.com

My profile

- Call settings
- Hunt groups
- Application settings
- Voicemail settings
- Audio settings

**Send feedback**

**Teams Embedded App: 2.7.387**

**Teams Desktop plugin: 1.2.231**

QUESTIONS? CONTACT US TODAY!

Tecnologex

(832) 934-4495

sales@tecnologex.com  
<https://tecnologex.com>