Revation LinkLive End User Manual



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Please note: many of the features outlined in this document are controlled by LinkLive Administrators, meaning that not all of the functions that are shown are available directly to all users. Please contact your LinkLive Administrator to have features enabled.

LinkLive Overview

LinkLive is unified communications software hosted in the cloud that provides digital-first capabilities including rich messaging, seamless customer engagement across digital and physical channels, and innovative voice and video communications.

LinkLive.app is where your Agents will go to sign in and use LinkLive every day. LinkLive offers a combination of secure and compliant unified communications with integrated advanced queuing and skills-based routing all providing unmatched capability while freeing up precious capital.

Multimedia Browser Requirements

LinkLive's multimedia features of voice/video conferencing and desktop sharing require the use of a HTML5 and WebRTC approved browser. On non-HTML5 and WebRTC browsers, the chat and file transfer features of LinkLive are available.

On a PC/Surface the supported browser is Chrome. On a Mac, the supported browsers are Safari and Chrome. On a Chromebook, the supported browser is Chrome. On an iOS device (iPad/iPhone) the supported browser is Safari. On an Android device, the supported browser is Chrome.



Please note that the multimedia features of LinkLive work on Safari 13.1 or greater, Chrome PC 83.0.4103.116 or greater, Chrome Mac 83.0.4103.97 or greater, Edge 44.18362.449.0 or greater and Firefox 77.0 or greater.

Standard Browser Requirements

LinkLive's standard features of chat and file transfer can be utilized from any browser (including Internet Explorer, Microsoft Edge, Firefox, etc.) on a computer, smartphone or mobile device.

Device	OS	Browser s
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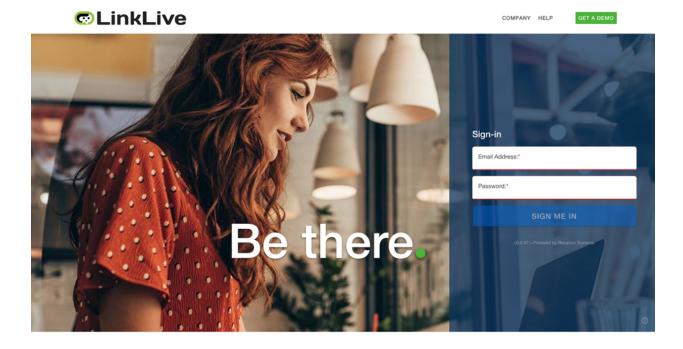
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믚	Mac	macOS	Ø
	Chromebook	Chrome OS	©
	iPad	iPadOS	⊘
	iPhone	iOS	⊘
	Android	Android OS	©

Signing Into LinkLive

To sign into LinkLive, visit your organization's LinkLive address (subdomain.linklive.app) You can also access www.linklive.app and follow directions.

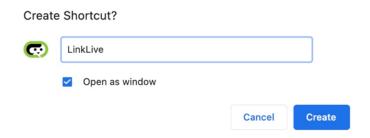
To sign in, you must enter your credentials as provided by your administrator: **Email Address**, and **Password**. *Note that these credentials are <u>case-sensitive</u>. If you have **Saved** your Password, make sure to check that your computer is password protected, so no one can log on with your account.

Once your sign in information is entered correctly, click the Sign Me In button. If you are unable to sign in successfully, check your credentials. These fields are case and character sensitive.

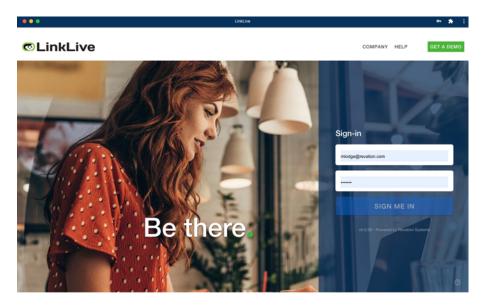


Secure, intelligent customer connections.

Although LinkLive can be accessed via a browser tab, for Chrome users, you may like running LinkLive as an application plugin on Google Chrome. To do so, click the icon in the top right-hand corner of the Chrome window and select More Tools>Create Shortcut.



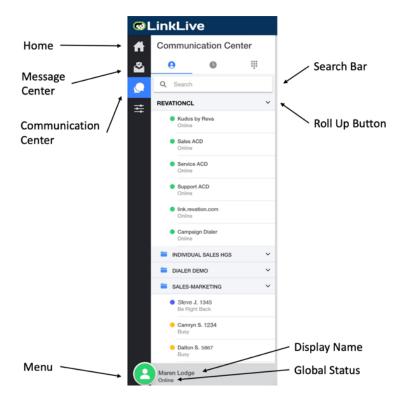
Check the Open as window box and click create. LinkLive will now run as an application of Google Chrome.

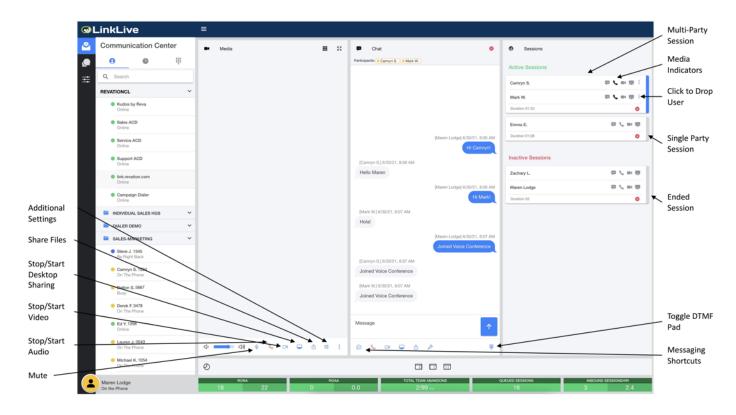


LinkLive's Contact and Session Windows

LinkLive enables businesses to deploy secure messaging, collaboration tools and contact center or help desk applications. LinkLive enables easy access to customer web chats, instant messaging, desktop sharing, IP voice, video, presence, web forms, and secure email applications.

The image below shows the home page of LinkLive upon signing in.





There are two types of users:

Presence Based Communications – General Users

General users have access to instant messaging, file transfer, encrypted email, web messaging, desktop sharing, and IP voice and video services.

Queues "Virtual ACD" – Agent Users

Agent users are setup to handle customer interactions for sales, service or support groups. Agent users are identical to general users with one exception; agents receive sessions from queues. Queues enable real-time routing and distribution of customer requests across different media types. The groups can be set up based on the type of service needed and the type of skill required to serve the customer. Queues can also be set up with automated announcements, customized greetings and have advanced messaging options. Queue managers have access to agent productivity reports, service level assurance tools, quality assurance monitoring and logs for all customer sessions.

Configure LinkLive

Basics – Configure Your Identity and Signing In

The first time you sign into LinkLive, you must configure it with your login information.

Put in your credentials as provided by your administrator: **Presence ID**, **User Name** and **Password**. *Note that these credentials are <u>case-sensitive</u>. If you have **Saved** your Password, make sure to check that your computer is password protected, so no one can log on with your account.

Once your sign in information is entered correctly, click the Sign Me In button. If you are unable to sign in successfully, check your credentials. These fields are case and character sensitive.

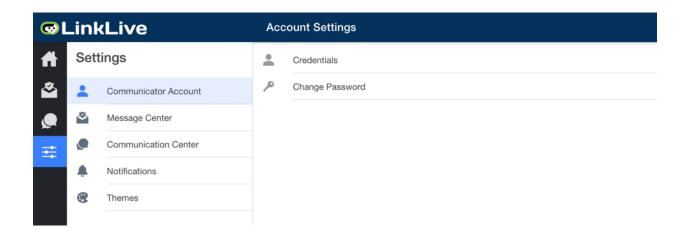
To change your status, click on your status in the name panel area in the bottom left-hand corner of the page. This is how everybody else will see you on their contact list. If you are an agent, this is how queues will determine your availability.

Configure your Options

To get to the Preferences menu, click on the settings icon on the left-hand side of the menu bar.

The Settings menu has several tabs: **Communicator Account, Message Center, Communication Center, Notifications** and **Themes**.

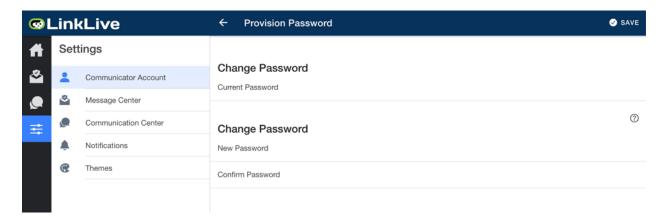
Communicator Account



To configure your account preferences, click on the **Communicator Account** tab.

To change your login credentials, click on **Change Password**.

Enter your current password, your new password and click Save in the top right corner.

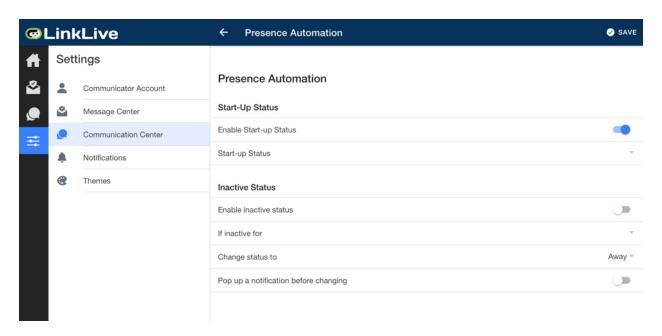


To change other LinkLive settings, click on the **Communication Center** tab.

Within the **Communication Center** tab, there are four different types of **Communicator Settings: Presence Automation**, **Message Window**, **Notifications**, and **Shortcuts**.

Presence Automation

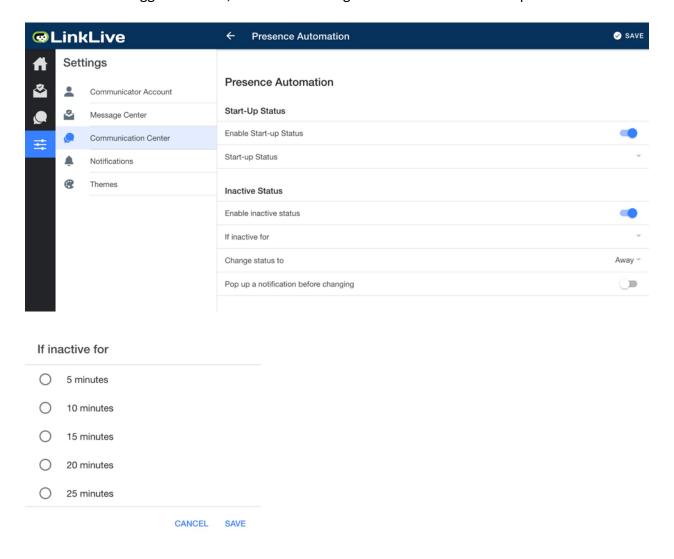
A **Start-Up Status** automatically assigns a specific status to an agent upon login. To enable a **Start-Up Status**, turn the **Enable Start-up Status** toggle on and select a start-up status from the drop down.



Star	t-up Status		
0	Online		
0	Away		
0	Busy		
0	Be Right Back		
0	On The Phone		
		CANCEL	SAVE

Your "Start-Up Status" should be "Busy" for agents and "Online" for general users; the default is "Online", but most agents require a few minutes to prepare prior to receiving customer sessions.

Additionally, an **Inactive Status** can be set. To enable an inactive status, turn the **Enable Inactive Status** toggle on. Then, select a time range in the **If Inactive For** dropdown.

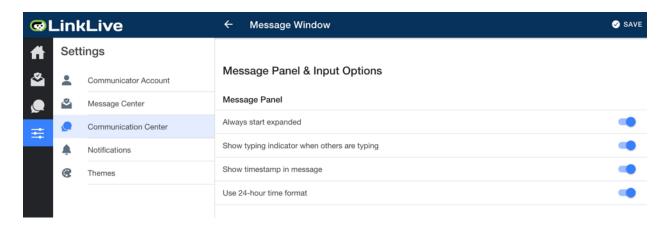


"If inactive for [x] minutes" is ideal for agents and the recommend setting is 3 – 5 minutes. General users can adjust this to their individual preference.

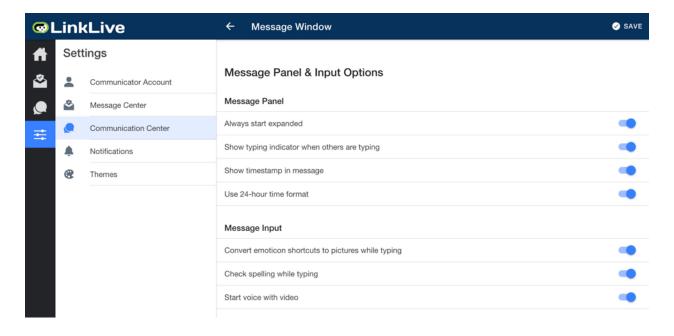
To receive a pop-up notification before your status is changed, turn the **Pop up a notification before changing** toggle on.

Message Window

Message Panel: Agents can select to set their message windows to always start expanded, show typing indicator when others are typing, display a timestamp in the message window, as well as use a 24-hour time format.



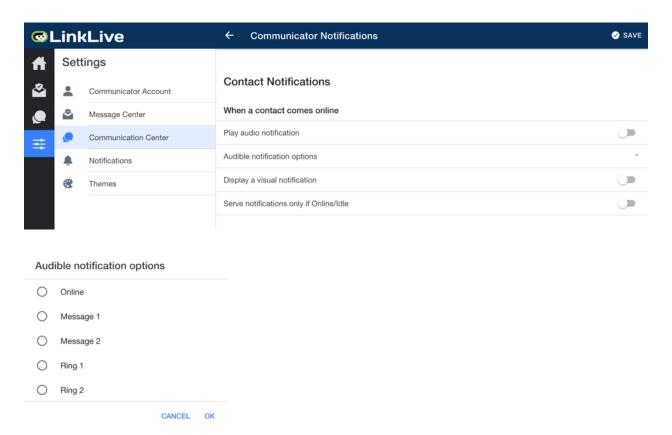
Message Input: Agents can select options to convert emoticon shortcuts into pictures while typing in the session window, turn on spellcheck while typing, as well as start voice with video.



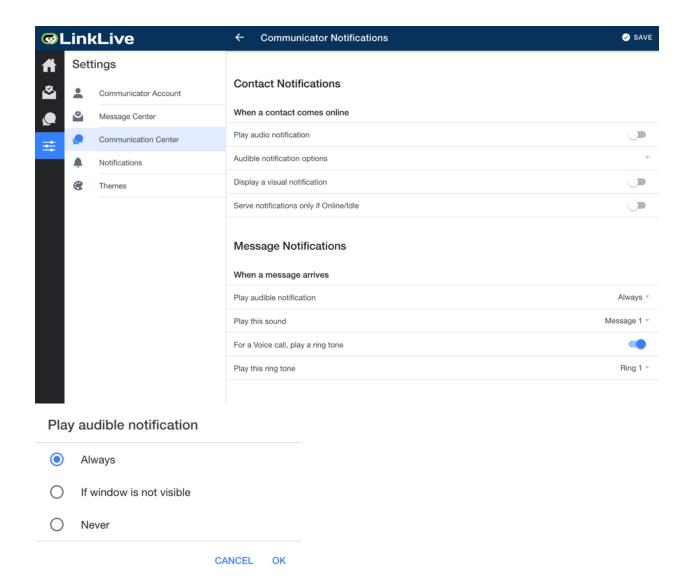
Notifications

Contact Notifications: When a contact comes online, LinkLive can notify you by "*Play an Audio Notification*" and/or "*Display a Visual Notification*". You can refine this option by only notifying if you are Online, by selecting the "*Only if Online*" option. Use the **Audible Notification Options** dropdown to select a sound file.

Users that do not want notifications every time anyone comes online should uncheck the first two boxes; however, this can be a convenient reminder when a user is becoming acclimated to the service.



Message Notifications: When a message arrives LinkLive can Play an Audible Notification "Always", only "If window isn't visible", or "Never".



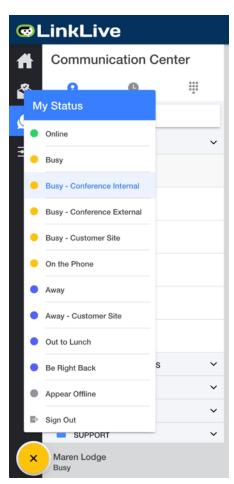
When a voice call arrives **Play a ring tone** is checked by default. These are helpful to alert you to the incoming call, even if LinkLive isn't visible on your screen. Use the **Play this ring tone** dropdown to select an audio file.

If there are several agents utilizing LinkLive in a close area, it is recommended to use different sounds to distinguish the different sounds.

Set Your Status

Your status is how everybody else will see you on their contact list. If you are an agent, this is how queues will determine your availability. You can change your LinkLive status by clicking the icon to the left of your display name at the bottom left-hand corner of your screen.



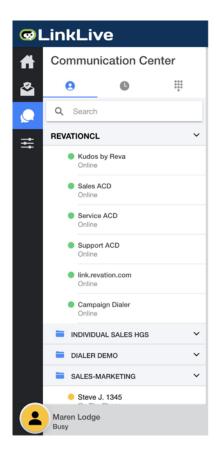


Using LinkLive

Organizing Your Client

Folders in a contact list can be expanded or minimized as displayed below. To make changes to the organization of your contact list, contact your system administrator.





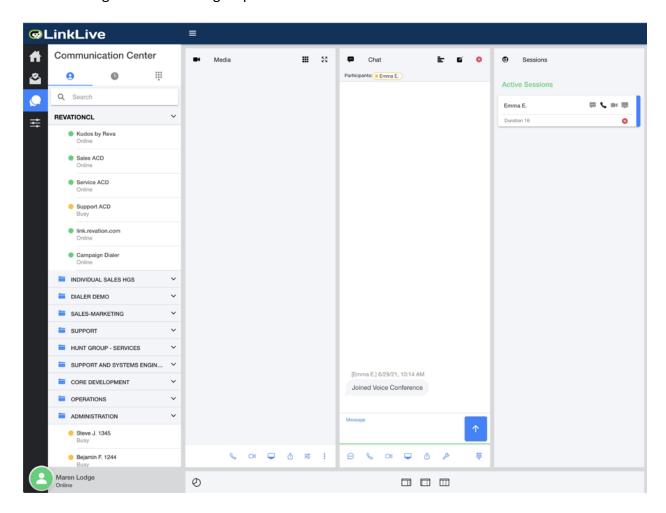
Rolled Up

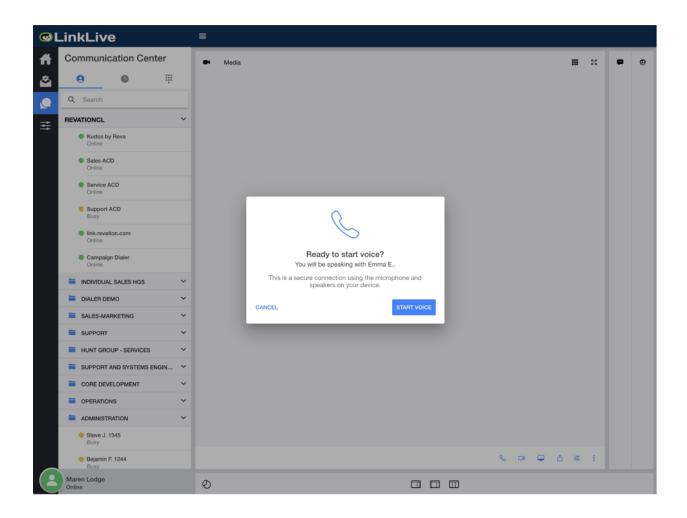
Rolled Down

Answer and Make Phone Calls

Answer an Incoming Call

When a call arrives to your LinkLive client, a session window pops up telling what number the call is coming from and what group or number the caller came into.

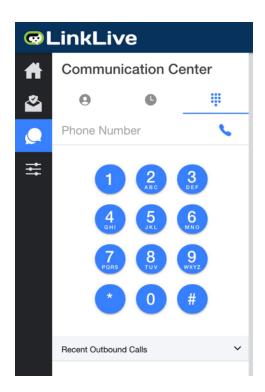




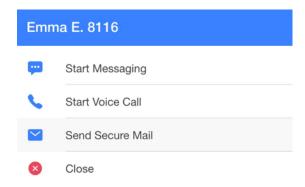
To answer the call over your computer, click the Talk button . The caller will hear ringback or hold music until you click Talk. To answer the call on another telephone, use the conference button to add your extension number or the desired phone number. If it is a chat that comes through, you can accept it by typing in the chat dialog box and pressing the Send button. Chats and calls also have unique sounds that help alert you to the type of session that is arriving.

Place an Outbound Call

At the top of your Communication Center, click the dial pad icon to type a phone number to dial. Always use 1 plus the full ten-digit number, unless your administrator has configured to allow for shorter dial strings. As soon as you press the blue phone icon, your call will begin. The dialog box that pops up will display a few informational items, but the action of the phone call takes place between your headset and the called parties' phone. As an alternative option, you can double click your queue and use the Dial option to add a phone number or another user to place an outbound call.

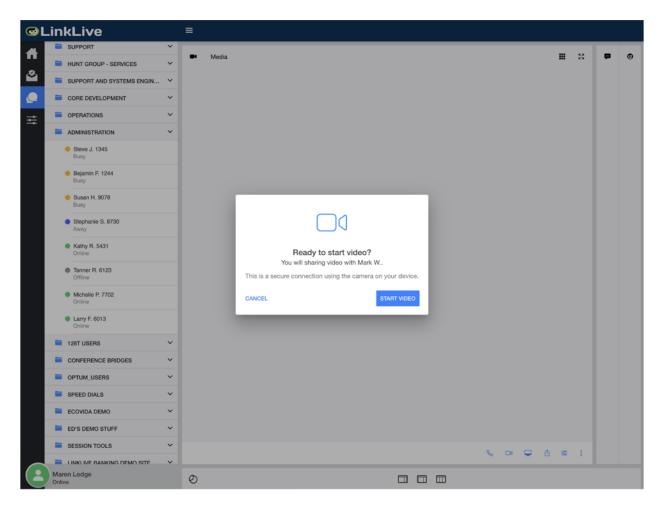


To place an outbound call to someone on your contact list, click on the contact and the pop-up displayed below will appear prompting you to start messaging, start a voice call or send secure mail. Click **Start Voice Call**.

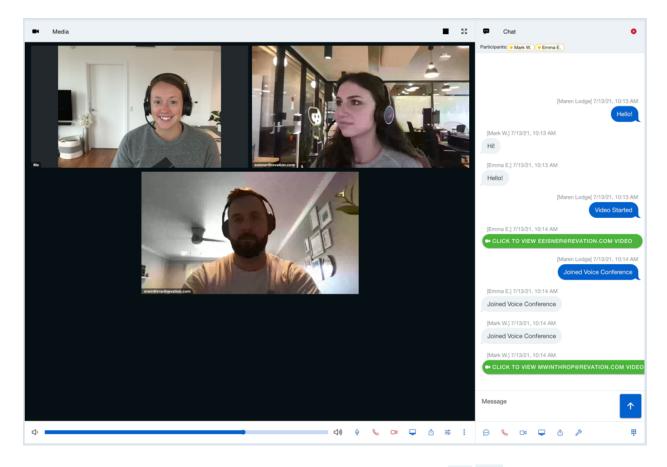


Start a Video Conference

Click the video button \Box and a video preview box will become available.



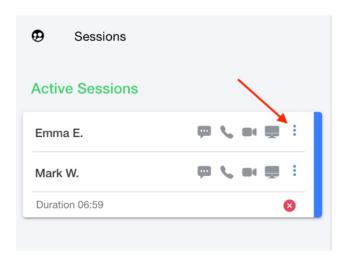
When there are multiple users conferenced together with more than one video stream, the video window will adjust to accommodate additional participants.



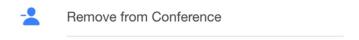
Users can also resize and adjust the video window by clicking the icons in the top right-hand corner of the media screen.

Hang Up and End Sessions or Push Individual Users Out of a Session

Click the red 'X' at the bottom right-hand side of the active session box to close out the session.



During a conference session with multiple callers and/or chat participants, you can use the icon next to the specific user to push them out of that session.



The media status bar also shows you which participants are using voice, video, desktop sharing, and which participants are actively typing within the session. The icon(s) highlighted in black indicate which media type(s) the participant is currently using.



Decline to Answer

If the system offers you an incoming queue call or chat and you are busy, agents in queues can decline to answer a session. Simply click the X button in bottom right corner of the session. The service moves to the next available agent in the queue.



Also, if you do not answer the call/chat within the amount of time configured by your administrator, the system will end yours and move the call/chat to the next available agent in the queue. For IP voice calls, the caller hears music on hold until an agent picks up the call. If no agents are available, callers always have the option to leave a voicemail message.

Note: Declined personal calls go directly to your voicemail box.

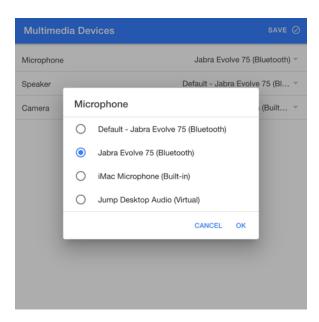
Keep Your Status Current

It is helpful if agents and presence users set their LinkLive status appropriately. The system uses the status of each user to determine who is available and offers queue sessions only to those with an available status.

Adjusting Audio Controls During Calls

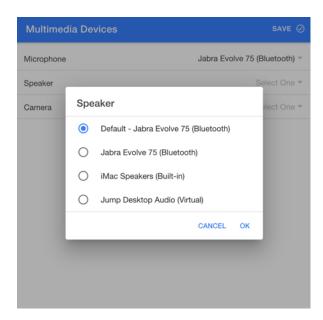
Changing Your Microphone

To change your microphone input when you are in a call, click on the settings icon located on the right-hand side of the media pane of the chat. This will open a menu to allow you to change your microphone input.



Changing Your Audio Output

To change your audio input when you are in a call, click on the settings icon located on the right-hand side of the media pane of the chat. This will open a menu to allow you to change your speaker input.



Changing Your Camera Output

To change camera selected to display video while you are in a call, click on the settings icon

located on the right-hand side of the media pane of the chat. This will open a menu to allow you to change your camera input.



Adjusting Call Sound Levels

To change the sound playback levels when you are in a call, drag the blue slider bar in the media pane of the chat window. Move the slider to the right to increase the sound level of the

call and make caller's voice louder or move the slider to the left to decrease the sound level of the call and make the caller's voice softer.



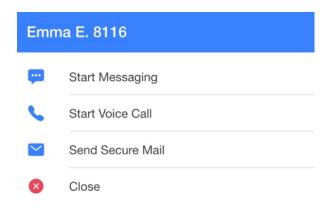
To **Mute** your speakers, drag the slider bar all the way to the left. Note that when your speaker is muted, you will be unable to hear your caller.

Chat and Instant Messaging

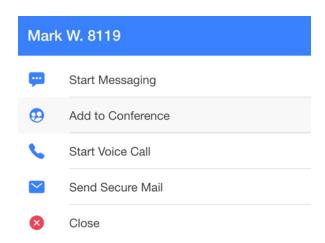
Managing Chats

Open a Chat Session

To begin a chat with another user, click on their name in your LinkLive contact list. A pop-up will appear prompting you to select to **Start Messaging**, **Start Voice Call**, or **Send Secure Mail**. Select **Start Messaging**. A chat window will open, and you can start typing messages.



To add a user to an existing chat, click on the contact's name and select **Add to Conference**.

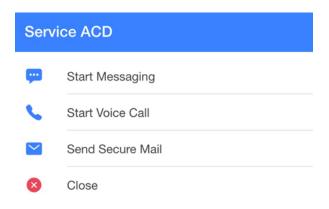


If a contact is offline, you can also hit "send secure mail" to send a secure message through the message center.

Conference Chat

To chat with an entire group (e.g. a folder), click on the group, and choose "Start Messaging." This will bring up a chat session with all the contacts in the folder.

Please note that if the number of contacts in the folder exceeds the number set by your administrator you will receive a popup warning message.



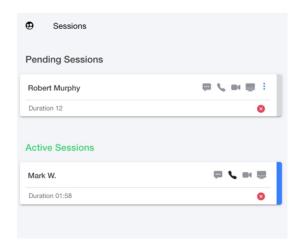
Switch From Chat to Phone Call

To turn a chat session into a conference call, simply click the Talk button $^{\circ}$. The other user will answer (also by clicking their Talk buttons), and your conference call is on has begun.

Open a Chat While on the Phone and Handling Multiple Tabs

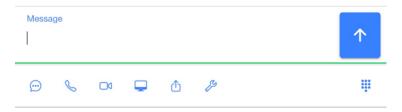
LinkLive allows users to conduct multiple separate chats and/or calls at the same time. This is useful if you are on the phone with a customer, and you want to use chat and get info with another agent or presence user.

With one session open, you can open a second session by clicking the users contact and selecting Start Messaging or Start Voice Call. When you have multiple sessions going, if a new tab appears in the window in the background, a pending session will appear in the Sessions pane.



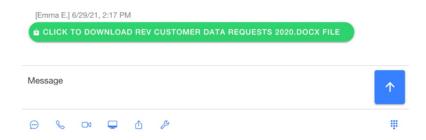
Tabs are the equivalent of telephone lines, but much better because you can share any type of media (text, files, desktop sharing, IP voice and video) and add any inside or outside party to chats or calls.

Inside a Chat



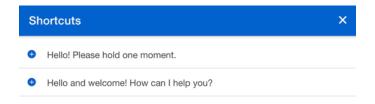
File Transfer

To send a file, click on the file transfer icon and select a file from your computer. If someone sends you a file, LinkLive will tell you and provide a link in the chat to open or download it.



Use Shortcuts

Shortcuts are only for use in chat sessions and are used to simplify repetitive tasks. Click on the Shortcuts icon $\stackrel{\bigcirc}{=}$ and choose from the list to use them. For more information, see the <u>All</u> about Shortcuts section below.

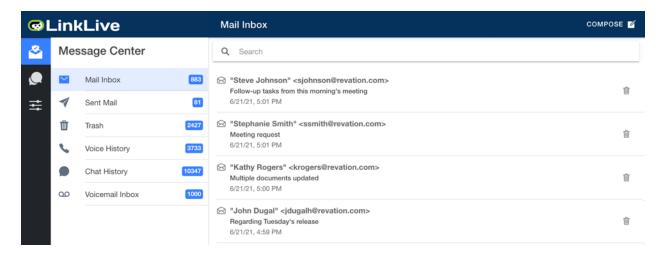


Push to Talk

You can record a snippet of audio to transfer to a chat participant by clicking the settings icon and confirming with the pop-up displayed below. Push to talk will record your microphone input only, not any audio from any other participants in the chat.

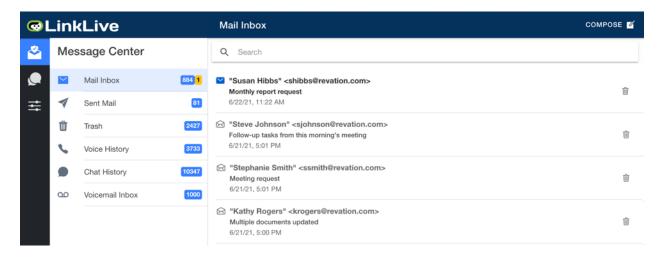
Options		
Start Voice Recording		
Close		

Message Center - Email, Chat Logs and Voicemail



Do I have messages?

If you have any email or voicemail messages, an icon will appear next to the **Mail Inbox** tab of the Message Center.



This is also where you can view **Sent Mail**, **Voice History**, **Chat History** and your **Voicemail Inbox**.

Access Prior Chat Sessions and Phone Calls

Your LinkLive mailbox provides access to the history of your chat sessions, mail messages, and phone calls. Simply click the "Chat History" option to view previous chats or calls. As an option, folders can be visible in MS Outlook, Mozilla Thunderbird, PDAs, most browsers, and other mail clients that support IMAP.



In the **Chat History** and **Voice History** folders, you can see all your previous chats and phone calls. Please note that your LinkLive administrator may have configured your group so that different session types (calls vs. chats) are accessed via their own tabs, labeled accordingly, instead of the sessions tab.

All About Shortcuts

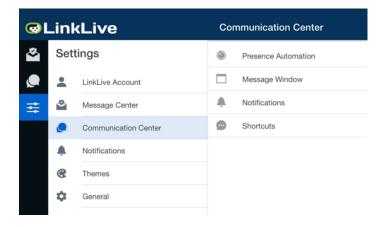
Shortcuts automate typing of text that you send frequently. For instance, "Hi, this is Mary, how can I help you?" or "Please hold while I pull up your account information", etc. Once you set them up as shortcuts, they are available for entry into chat sessions.

Use a Shortcut in a Chat

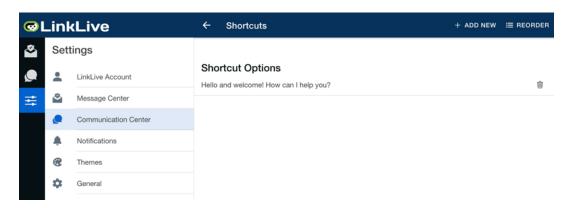
Within a chat session window, click the Shortcut icon , and choose the Shortcut you want from the drop-down menu. The text represented by the Shortcut, will be inserted into the chat session.

Enter a New Chat Shortcut

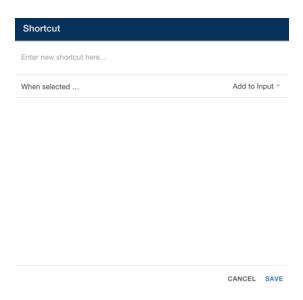
To enter a new text shortcut for chat sessions, the user must first create the shortcut in the Communication Center settings tab in the main Settings menu.



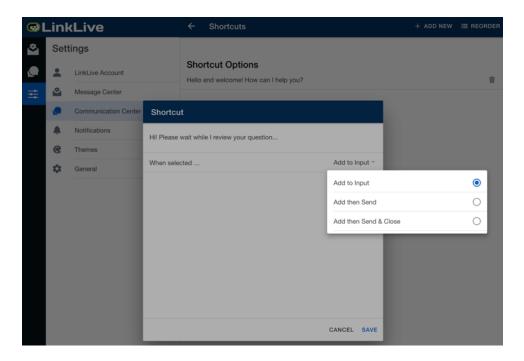
To create a shortcut, click + Add New in the top right-hand corner.



A pop-up will appear prompting you to enter the text for the shortcut.



After entering the text, the user must choose an option for when the shortcut is selected. There are three options for how you may enter a Shortcut into a chat. The difference between the three options is what happens after you select a shortcut **Add to Input**, **Add then Send**, **Add then Send & Close**.



Add to Input simply enters the text into the bottom chat window and then you may enter additional text and/or click the Send button to send the chat. An example might be: "I am stepping away – I will be back in X minutes" and after you enter this, you could simply edit "X" and click send.

Add to Input then Send enters the text and sends the chat automatically. This can be used for a shortcut that is ready to send to the other party immediately. For example: "Hi, this is Mary, how can I help you today?"

Add to Input, Send, then Close enters the text, sends it, and then closes the chat window immediately. For example: "I cannot talk now. I will chat with you later."

Click Save once the selection has been made.

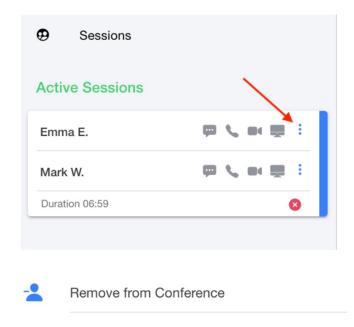
To delete a shortcut, click on the trash icon next to it.

To reorder shortcuts, click on the reorder button and use your mouse to drag the shortcuts.



Remove a party from the conversation

Inside of the chat window, click the blue icon in the media status bar for the participant you wish to remove. A pop-up message will appear confirming you wish to remove that participant from the conference.



Video Conferencing & Desktop Sharing



If authorized by the system administrator, LinkLive users can share their desktops, specific applications, and video. Desktop and Application Sharing as well as Video works with other LinkLive users and with visitors over web chat. Administrators control who can share, who can view, and what users can share externally. To start sharing, the user clicks the share button inside of a chat window. There are two types of sharing for desktop / application and for video:

Video Conferencing

Video: Share or Broadcast

This enables users to select a video camera connected to the system and stream the session to the other users in the chat.

When a user activates Broadcast, the media status bar will highlight desktop sharing or video and then will also add a link inside the chat window.

To stop sharing, the user simply clicks the desktop or video sharing button.

Desktop Sharing

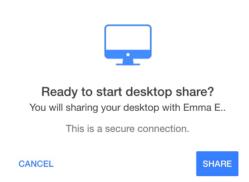
This enables users to select a specific monitor, all monitors, a specific application, or their entire desktop on either monitor to stream the session to the other users in the chat. Unlike traditional web conferencing, LinkLive enables more than one user to share desktops simultaneously.

When a user activates sharing, the media status bar will highlight desktop sharing or video and will also add a link inside the chat window.

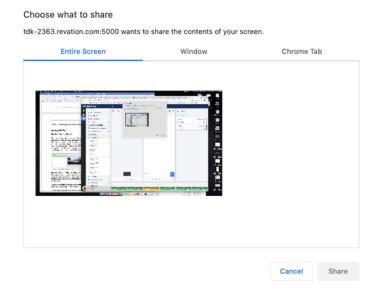
[Camryn S.] 7/13/21, 9:24 AM

■ CLICK TO VIEW CSCHAKE@REVATION.COM DESKTOP SHARE

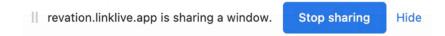
To share your desktop, click the icon. A pop-up will appear confirming you wish to share your desktop.



Next, the user can select whether to share their entire screen, a specific window or a specific tab within their browser.



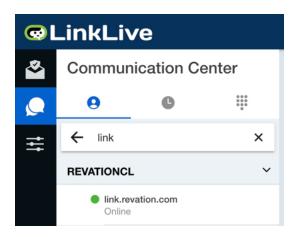
To stop sharing, the user clicks the **Stop Sharing** button.



Agent Connect (link.revation.com)

Contact center agents who need to see the computer screen of a caller or add non-LinkLive users to a chat, frequently use Agent Connect (also known as link.revation.com). Presence users use Agent Connect for easy web conferencing and rapid file transfers. There are two steps to create an outbound Agent Connect session.

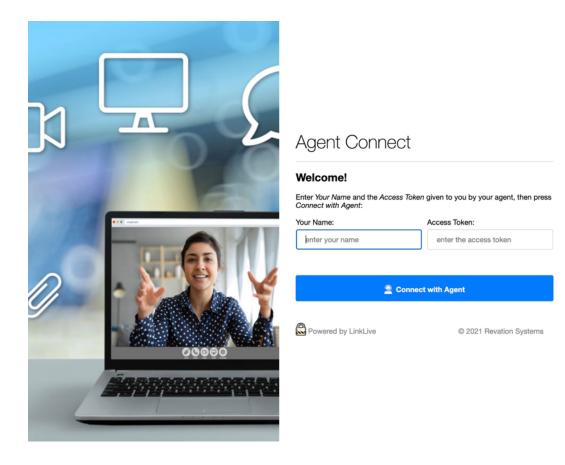
The LinkLive user types 'link' in the search bar of the Communication Center and clicks on 'link.revation.com' and Start Messaging. This creates a session with a unique token.



[link.revation.com] 7/13/21, 8:38 AM

A session was created for a web user. Have the user go to the connect website and enter: **87033**

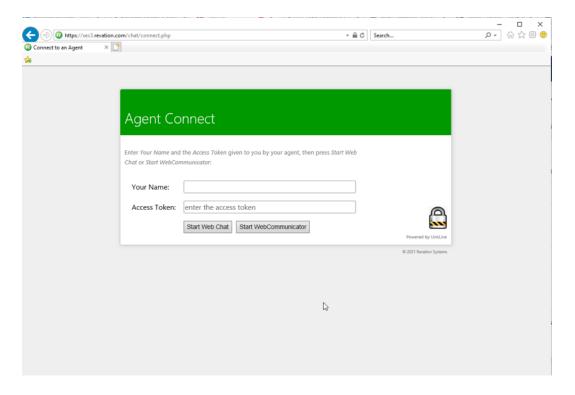
Then, the agent invites the user to visit www.link.revation.com where the agent connect URL has been setup. The user will enter their **Name** and **Access Token**, then click the **Connect With an Agent** button. This will begin a media-rich session that includes voice, video, and desktop sharing.



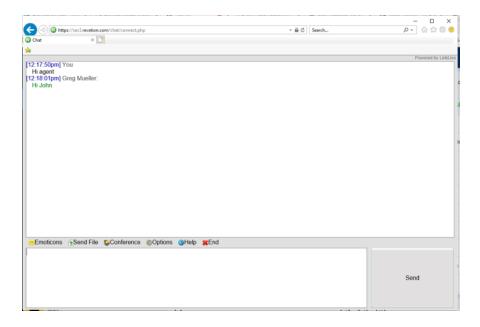
Using Agent Connect on a Non-Compliant Browser offers two different experiences: **Chat Only** and a **Download for Multimedia**.

Chat Only

Users with browsers that do not meet the browser requirements to use multimedia on LinkLive, such as Internet Explorer, will be prompted to start a Web Chat.

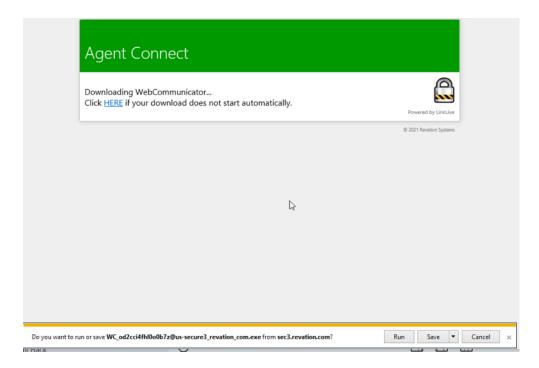


The user enters their name and the access token provided by the agent and clicks on the Start Web Chat button to begin the chat session. The Web Chat session is identical to a customer-initiated web chat.



Download for Multimedia

Alternatively, if authorized by the system administrator, web visitors can participate in multimedia conferencing. Once a user is in a regular web chat session, he or she will have session media controls like a full LinkLive user. To enable full multimedia in the web chat session, the web visitor clicks the Conference icon Start WebCommunicator in the chat window to download and run an executable file to enable rich media. This file is downloaded and run on the computer but is not installed on the web visitor's computer and does not make any changes to the web visitor's computer.



The web visitor double-clicks on the downloaded "WebCommunicator" executable file to run it.

Web Communicator opens a new window as shown below.



Using the advanced media sharing buttons like the full LinkLive, the web visitor can use IP Voice, Video, Desktop Sharing and file transfer.

*Please note that for users with HMTL5 and WebRTC browsers, there is no need for the one-time download.

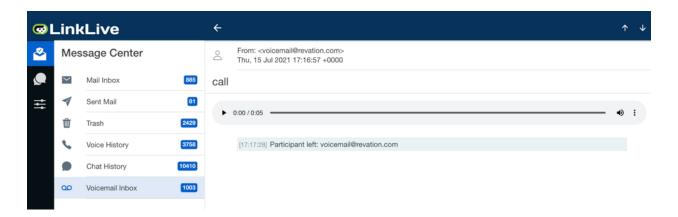
Revation Voicemail

To access your voicemail inbox, select the **Voicemail Inbox** tab in the Message Center of LinkLive. When a new message(s) is received, the Voicemail Inbox tab will display the number of new messages highlighted in gold.



Select the message and click play to listen to the voice message.





In addition to listening to voicemail from the Message Center in LinkLive, users can an also retrieve voicemail outside of LinkLive by their dialing number and retrieving messages from the cloud.

Enter PIN

When you first dial your number, you will hear:

"Please enter your PIN number, followed by the pound (#) sign."

- Enter your PIN code and press #, or wait 5 seconds.
- Press * to clear entered digits and repeat greeting.
- Nothing entered for 10 seconds ends call with "Goodbye."

If you enter the PIN incorrectly, you will hear "The PIN you have entered is incorrect." and the greeting will play again.

Message Count

You will hear the number of new messages you have, "You have [X] new message(s)", and you will go to the Main Menu.

Main Menu

You will hear the "Main Menu" greeting.

If you have messages waiting, you will hear "To listen to messages, press 1."
You will then hear "For your personal options, press 4."

- Press 1 to listen to your messages.
- Press 4 to set your personal options.
- Press * to repeat the menu.
- Press # to end call with "Thank you, goodbye."
- Nothing entered repeats options 3 times, then ends call with "Goodbye."

Listening to Messages

If you have no message, you will hear "You have no new messages." and you will return to the Main Menu.

Otherwise, you will hear "First message." and you will hear the message.

While listening to a message, you can:

- Press 7 to stop playing and delete the message. You will hear "Message deleted" then "Next Message" or "End of Messages".
- Press 6 to stop playing and go to message options.
- Press * to stop playing and return to the Main Menu.

After the message plays, you will hear the message options:

- Press 7 to delete the message. You will hear "Message deleted" and then you will hear either "Next Message" and hear the next message or you will hear "End of Messages" and you will return to the Main Menu.
- Press 2 to play the message again.
- Press 6 to save the message as new and play the next message.
- Press * to return to the Main Menu.
- Press # to hear the options again
- Nothing entered repeats options 3 times, then ends call with "Goodbye."

Personal Options

You will hear the options:

Press 1 to record a new outgoing message.

- Press 2 to hear your current outgoing message and return to <u>Personal Options</u>.
- Press 3 to use the system default outgoing message. You will be asked to confirm by pressing 1 or return to Personal Options by pressing 2 or *.
- Press * to return to the Main Menu.
- Press # to hear the options again
- Nothing entered repeats options 3 times, then ends call with "Goodbye."

Recording an Outgoing Message

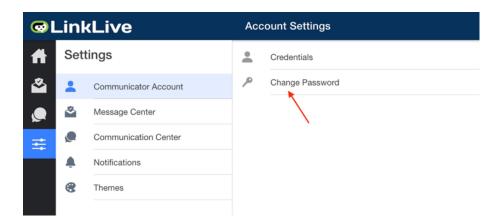
You will hear "Record your new outgoing message after the beep. When you are finished, press the pound (#) sign."

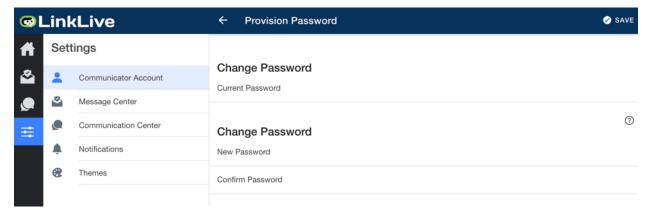
The maximum message length is 2 minutes. When you are done, your options are:

- Press 1 to re-record a new outgoing message.
- Press 2 to set the recorded message as your current outgoing message.
- Press * to cancel and return to Personal Options.
- Press # to hear the options again
- Nothing entered repeats options 3 times, then ends call with "Goodbye."

Resetting Your LinkLive Password

To reset your password, go to the **Communicator Account** tab under Settings and click **Change Password**. Enter your current password, as well as your new password and click Save.





If a user is not signed in and needs to reset their LinkLive password, please contact <u>Revation</u> <u>Support</u>.

FAQs

Q: Will LinkLive timeout?

A: Users remain logged in indefinitely until they explicitly log out. However, if a network goes offline for > 45 seconds, that may cause an interruption in service. As a best practice, it is recommended that LinkLive users run the application plugin on Google Chrome rather than accessing LinkLive as a browser tab.

Revation Systems Support Information

System Administration Support

Email: support@revation.com

Phone: 1-952-392-1831

Chat: https://revation.com/contact-us/

Business & Sales Contact

Email: <u>sales@revation.com</u>
Phone: 1-952-392-1830

Chat: https://revation.com/contact-us/