ELITE OFFICE SUITE

User & Administrator Manual

Core workspace, collaboration, administration and daily operations

Current Build - September 28, 2026

Prepared from the current Elite application source package. Interface visibility varies by assigned abilities and enabled modules.

Contents

This contents list follows the manual in reading order.

Quick Start Get productive in the first 10 minutes

1 Signing In and Accepting an Invitation

2 Navigation, Organizations and Abilities

3 Dashboard

4 Team Administration

5 Marketing Pipeline

6 Tasks

7 Calendar and Recurring Events

8 Company Mail

9 Collaborations

10 AI Assistant

11 Messages

12 Meetings and Guest Access

13 Files

14 Appearance

15 Phone and Calls Overview

16 Troubleshooting and Support

Appendix Reference values and administrator checklist

About This Manual

This manual describes the current Elite Office Suite staff workspace represented in the source package supplied on September 28, 2026. It covers the screens and actions exposed by that build. Some navigation items appear only when the signed-in user has the corresponding ability.

Authorization model

The current Team Administration screen explicitly states that Elite does not use roles for staff authorization. Staff access is assigned through abilities. Menu items can therefore differ from one user to another.

The Call Center has its own companion manual. This manual includes only a short overview of the phone-related areas that appear inside the Elite workspace.

Quick Start

Use this sequence when onboarding a new organization or staff member.

1. Sign in with your Elite email address and password. Select Keep me signed in only on a trusted device.
2. Confirm the left navigation shows the work areas you need. If a menu item is missing, ask a Team Administrator to review your assigned abilities.
3. Open Dashboard to see current work, today's events and communication shortcuts.
4. Use Tasks for assignments and due dates; use Calendar for meetings, reminders, deadlines and recurring events.
5. Use Messages for one-to-one staff conversations and Collaborations for shared workspaces that combine members, tasks, meetings and existing files.
6. Use Meetings to create an immediate video room and, when needed, copy a private guest invitation link.
7. Use Files for private staff documents, manuals, installers and other organization resources.
8. Use AI Assistant for draft analysis and guidance. The current copilot is read-only: it does not send messages or change records automatically.

1. Signing In and Accepting an Invitation

Elite supports normal sign-in and invitation-based account onboarding.

Sign in

9. Open the Elite sign-in page.
10. Enter Email address and Password.
11. Optionally select Keep me signed in.
12. Select Sign In.

Accept a team invitation

A Team Administrator creates an invitation for an email address and selects the abilities the user will receive. In the current build, Elite displays a private invitation link for the administrator to copy; Elite is not sending the invitation email automatically yet.

13. Open the invitation link supplied by the administrator.

14. Enter your Name.
15. Create a Password and enter it again in Confirm password.
16. Select Create Account & Accept.
17. Sign in to Elite with the invited email address.

Current-build note

If an administrator says an invitation was created but you did not receive email, ask for the invitation link directly. Pending invitations can be regenerated with New Link or cancelled.

2. Navigation, Organizations and Abilities

The left sidebar is capability-aware. Elite shows only the areas the signed-in staff member is allowed to use.

Ability	Navigation / function
team.manage	Team; Users & Permissions
marketing.use	Marketing
tasks.use	Tasks
calendar.use	Calendar
mail.use	Mail and, when available, Integrations
collaborations.use	Collaborations
ai.use	AI Assistant and quick copilot widget
messages.use	Messages
meetings.use	Meetings
calls.use	Phone, Calls & Voicemail, Call Directory
calls.manage	Departments & Queues, Phone Menus, Announcements, Extensions
files.use	Files

Dashboard is the staff home page. Administration sections appear only when the required management ability and route are available. The active organization and its timezone determine which records and calendar times are shown.

3. Dashboard

Dashboard summarizes the organization's current work and provides shortcuts to the areas available to the signed-in user.

- Personal greeting based on the organization timezone.
- Open task count and a short list of current tasks, ordered with due work and higher priorities surfaced first.
- Today's event count and calendar shortcuts.
- Communication shortcuts for Messages, Mail, Calls & Voicemail, Meetings, Files, Collaborations and AI Assistant when those abilities are enabled.

Tip

Use Dashboard as the starting point each day, but use the dedicated feature pages when you need filtering, editing or administration.

4. Team Administration

Team Administration manages organization membership, active status and abilities.

Members

18. Open Team or Users & Permissions.
19. Expand Assigned Abilities for a member.
20. Select or clear only the abilities that person needs.
21. Select Save Abilities.
22. Use Active organization access to enable or disable the member's organization access, then select Save Status.

Administrator protection

Elite prevents the final active Team Administrator from losing Team Administration or being deactivated. At least one active user must retain Team Administration.

Invite a user

23. Enter the user's Email address.
24. Select the abilities the user should receive on acceptance.
25. Select Create Invitation.
26. Copy the generated invitation link and send it to the user yourself.
27. Use Pending Invitations to create a New Link or Cancel an outstanding invitation.

Elite blocks duplicate membership invitations and a second pending invitation for the same email address.

5. Marketing Pipeline

The current Marketing area is a staff CRM / beta-recruitment pipeline for tracking prospects from first contact through testing and conversion.

Pipeline stages and priorities

Type	Current values
Stage	Prospect; Contacted; Interested; Invited; Testing; Converted; Declined
Priority	Low; Normal; High; Urgent
Activity type	Note; Email; Call; Meeting
Lead source	LinkedIn; Referral; Website; Direct Email; Personal Network; Other

Add a lead

28. Open Marketing and select Add Beta Lead.
29. Enter Name and Email.
30. Optionally enter Company / Catalog, Role / Position and Catalog / Company Size.
31. Choose Lead source, Pipeline stage and Priority.
32. Assign staff if appropriate and set Next follow-up if known.
33. Add Initial context and Internal notes as needed.
34. Select Add to Pipeline.

Work a lead

35. Open a lead from Marketing Pipeline.
36. Update Stage, Priority, Assigned staff, Next follow-up and Internal notes, then select Save Lead.
37. Use Compose Email to open the local mail client for the lead address.
38. Use Record activity to add a Note, Email, Call or Meeting entry describing what happened and what comes next.
39. Review Activity history and the Lead information panel before the next follow-up.

The pipeline dashboard includes totals, prospects, testing counts and follow-ups due. Search and stage filters help narrow the list.

6. Tasks

Tasks track assignments, priority, due dates and completion status.

Field	Current choices / behavior
Status	Open; In progress; Completed; Cancelled
Priority	Low; Normal; High; Urgent
Assignee	Active organization member or Unassigned
Due	Optional date/time

Create a task

40. Open Tasks.
41. Enter Task and optional Notes.
42. Choose Assign To. The create form defaults to the current user unless changed.
43. Choose Priority and optional Due date/time.
44. Select Create Task.

Filter and manage tasks

- Use status, priority and assignment filters; quick views include Open, My Tasks, Overdue and Due 7 Days.
- Select Edit to change task details.
- Select Complete to close active work; select Reopen to return a completed task to active work.
- A task may display Client and Project context when that relationship already exists in the data.

7. Calendar and Recurring Events

Calendar handles staff events in the organization timezone and supports recurring daily, weekly and monthly schedules.

Field	Current behavior
Type	Meeting; Reminder; Deadline; Other
Assign To	Active member or Everyone / Unassigned
Time	Starts required; Ends optional and cannot be before Starts
Other	Location, Notes, All day
Repeat	Does not repeat; Daily; Weekly; Monthly

Add an event

45. Open Calendar and select Add Event or + New Event.
46. Enter Title, Type and optional assignee.
47. Set Starts and optional Ends.
48. Add Location and Notes if needed.
49. Select All day when appropriate.
50. Configure Repeat if the event recurs.
51. Select Add to Calendar.

Recurring schedules

- Daily, weekly and monthly recurrence are supported.
- The recurrence interval can be adjusted with Every.
- Weekly events can repeat on selected weekdays.
- Monthly events can use the same calendar date or an ordinal weekday such as First Monday or Last Friday.
- A same-date monthly event skips a month when that calendar date does not exist.
- A recurring series can end Never, On date, or After number of occurrences. The first event counts as occurrence #1.

Edit or cancel recurrence

When editing a recurring occurrence, the current UI can save only that occurrence or cancel that occurrence. It also provides a separate option to cancel the entire series. When editing the series itself, Save Entire Series updates the recurring series.

Calendar video meetings

For a scheduled, non-recurring event whose Type is Meeting, the edit screen can start a video meeting or rejoin the active meeting. The current build does not expose the Start Video Meeting action for recurring events.

8. Company Mail

Company Mail is an optional bridge to the organization's existing email service.

- Open Webmail launches the organization's mailbox/webmail destination when configured.
- Configure Email opens the email configuration area when available.
- Company SMTP is used for outbound platform email.
- Elite can operate without company email configured.
- The current page states that SMTP credentials are stored encrypted and that inbox/mailbox access remains with the organization's email provider.

Scope note

The supplied source package includes the Company Mail status/launch page but not the detailed Integrations settings screen, so this manual does not invent field-by-field SMTP instructions.

9. Collaborations

Collaborations are shared staff workspaces that keep people, meetings, tasks and existing staff files together.

Area	What you can do
Workspace	Create with Name and Purpose / Notes; filter by status
Members	Add staff members; message a member; remove members where permitted
Meetings	Start a meeting from the collaboration and join active meetings
Tasks	Create a task, assign it, set priority/due date, complete/reopen or edit it
Files	Attach an existing Staff File, download it, or detach it from the collaboration

Collaboration statuses in the current build are Active, Completed and Archived. Task priorities are Low, Normal, High and Urgent.

10. AI Assistant

Staff AI Copilot analyzes verified internal context and produces draft guidance. It is intentionally non-transactional in the current build.

Task	Purpose
Today's marketing priorities	Finds overdue, high-priority and unassigned pipeline work.
Summarize a lead	Summarizes the selected lead using recorded lead data.
Draft beta outreach	Creates a draft based on the selected lead and recorded activity.
Recommend a follow-up	Suggests follow-up based on the selected lead.
Summarize staff operations	Provides internal operational guidance.

52. Open AI Assistant.
53. Choose a Task.
54. For lead-specific tasks, select a Lead.
55. Optionally enter Instructions or context (up to 3,000 characters).
56. Select Generate.
57. Review the Copilot response and Recommended next step before using them.

Human review required

The current UI states that the copilot reads verified staff information but cannot send messages or change records. Generated work is draft-only and should be reviewed before use.

A compact Ask Copilot widget may also appear in the staff layout when the AI ability is enabled. Quick questions are limited to 1,500 characters in the current controller.

11. Messages

Messages provides direct staff conversations within the organization.

58. Open Messages.
59. Choose a person from Staff Directory or open an existing conversation.
60. If starting a new conversation, select the staff member to create/open that conversation.
61. Enter a Message and select Send Message.
62. Use Back to Inbox to return to the conversation list.

Message bodies are limited to 10,000 characters in the current build.

12. Meetings and Guest Access

Meetings creates secure video rooms for staff and supports private guest invitation links.

Start a meeting

63. Open Meetings.
64. Optionally enter a Meeting title (up to 180 characters).
65. Select Start Meeting.
66. The room opens immediately. Use Open in New Window if you prefer a separate browser window.

Invite an outside guest

67. Open the active meeting.
68. Copy the Guest invitation link with Copy Invite Link.
69. Send the private link to the guest.
70. The guest enters Your Name and selects Join Video Meeting while the room is active.

Private link behavior

The meeting screen states that anyone who has the private guest link can enter a name and join while the room is active. Treat the link as meeting access information.

End a meeting

When the signed-in user is allowed to end the room, the meeting page shows End Meeting. Ending the meeting stops the application from issuing new join tokens for that meeting.

13. Files

Staff Files is private organization storage for documents, resources, software packages and other staff downloads.

Upload a file

71. Open Files and select Upload File.
72. Enter Title and choose Category.
73. Optionally enter Version, Description and Release Notes.
74. Optionally select Mark as current release for this category.
75. Choose the File and select Upload File.

Category choices	Current values
Categories	Desktop App; Legal; Manuals; Sales; Marketing; Training; Technical; Utilities; Other
Maximum file size	4 GB in the current upload screen and validation

The Files dashboard reports Server Free Space, Total Files, Total Downloads and Storage Used. File rows show title, category, version, size, download count, upload date and actions such as Download or Delete when available.

14. Appearance

Appearance lets the user select an Elite visual theme.

Theme	Description from current build
Midnight	Deep navy with a restrained blue accent.
Graphite	Neutral charcoal and steel for a corporate workspace.
Emerald	Dark slate with a sophisticated green accent.
Royal	Deep navy and violet with a polished executive feel.
Burgundy	Dark charcoal with a muted wine accent.
Midnight Copper	Midnight workspace with a warm copper sidebar and accents.
Slate & Teal	Charcoal workspace paired with a deep teal navigation tone.
Navy & Sand	Deep navy balanced with warm sand and muted gold accents.
Plum & Charcoal	Charcoal workspace with a rich plum navigation palette.

76. Open Appearance.
77. Choose the preferred theme.
78. Select Save Appearance.
79. Return to Dashboard.

15. Phone and Calls Overview

Phone features are integrated into the Elite staff workspace when Call Center access is enabled.

- Phone provides the browser phone interface, including Enable Phone, Call, Answer, Reject, Hang Up and Mute.
- Calls & Voicemail provides call activity, voicemail and staff follow-up controls.
- Call Directory lists visible internal extensions and provides Call actions.
- Management screens - Departments & Queues, Phone Menus, Announcements and Extensions - require call-management access.

See the separate Elite Call Center User & Administrator Manual for setup, queue routing, IVR, extensions and agent workflows.

16. Troubleshooting and Support

Start with the visible symptom and the user's assigned abilities.

Symptom	Check first
A menu item is missing	Ask a Team Administrator to confirm the corresponding ability and active organization access.
Invitation email never arrived	Current build does not automatically email invitation links;

	administrator should copy/send the generated link.
AI task requires a lead	Select a lead for Summarize a lead, Draft beta outreach or Recommend a follow-up.
Recurring calendar meeting has no Start Video Meeting button	Current build exposes calendar video start only for non-recurring scheduled meeting events.
Company email unavailable	Elite works without email. Check Company Mail / email configuration status.
File upload fails	Confirm required metadata, file selection and the current 4 GB application limit.
Guest cannot join meeting	Confirm the meeting is still active and the guest is using the current private link.

Support information

The public support site currently advertises business-hours support Monday-Friday, 9:00 AM-5:00 PM Pacific Time. When contacting support, identify the page, the action attempted, the exact error, and whether the issue affects one user or the whole organization.

Appendix A - Reference Values

Feature	Values
Task status	open; in_progress; completed; cancelled
Task priority	low; normal; high; urgent
Calendar event type	meeting; reminder; deadline; other
Marketing stage	prospect; contacted; interested; invited; testing; converted; declined
Marketing activity	note; email; call; meeting
Collaboration status	active; completed; archived

Appendix B - Administrator Checklist

- Keep at least one active Team Administrator.
- Give users only the abilities needed for their work.
- Send invitation links manually until automated invitation email is added.
- Confirm the organization timezone before relying on calendar times.
- Review Company Mail configuration if outbound invitations/notifications are required.
- Use Staff Files category/version/current-release metadata consistently.
- Treat AI output as draft work and keep a human review step.
- Use the Call Center manual for telephony administration.