# **Discord** USER HELP GUIDE

By Christian Fong, Kyle Miller, and Guillaume Williams

## OVERVIEW

Discord is a free to use messaging software designed to foster nichefocused online communities.

This manual was written to help users understand Discord and several of its functions. The help articles are divided into three separate sections: User Profile Connecting With Others, and Server Management.

#### TABLE OF CONTENTS

Overview	ii
Table of Contents	
USER PROFILE	1
Create an Account	2
Enable Two-Factor Authentication	
Change your Profile Picture	6
Change your Status	9
Set a Nickname	
From your profile settings	11
From a server	13
Manage Third-Party Connections	
Connecting a Third-Party Account	14
Removing a Third-Party Account	
Add a Friend	17
From your Direct Messages	17
In a server	
Send a Direct Message	
CONNECTING WITH OTHERS	23
Join a Server	
Post an Image	
Post a GIF	
React to Posts	
Pin a post	
Search for Old Posts	

Mute a Channel	31
Call Someone	
Change Someone's Volume	
Mute and Deafen in Voice Channel	
How to mute	35
How to Deafen	36
Share a Screen	37
Set Direct Messages to 'Friends Only'	39
Create Group DM	41
SERVER MANAGEMENT OVERVIEW	.43
Create a Server	44
Sending Invitations	
Through the server	46
Through a users name	47
Creating Roles	
Create Channels	52
Using The Channels section	52
Selecting from the server options	53
Right click Background	54
Creating Channel Categories	56
Selecting from Server options	56
Right click background	57
Delete a Channel	
Lock a Channel	60
Hide a Channel	62
Banning Someone From Server	64
In the settings	64

# **USER PROFILE**

This section covers the basics, such as creating a Discord account, adding friends, and managing your profile.

#### CREATE AN ACCOUNT

This article outlines how to create your Discord account. You must be at least 13 years old to use Discord.

- 1. Visit discord.com/register on your favorite web browser.
- 2. Fill in your information.
  - You need a valid email address, a username and password, and your date of birth.
- 3. Click **continue** to create your account.
  - You will be taken to Discord's browser app with your brand new account.
  - You will also receive a verification email to the email address you provided.

Welcome to Discord!

#### ENABLE TWO-FACTOR AUTHENTICATION

Two-Factor Authentication (2FA) uses a separate app to verify who you are when you log in Discord. This helps make sure your account is safe even if your password is compromised. This article outlines how to set up 2FA for Discord.

 Select the User Settings cog from the bottom left, as pictured below.



- The user settings menu will open. A list of setting categories will be on the left while an enlarged user profile card will be on the right.
- Opening User Settings will take you to the My Account settings page by default. Click the blue Enable Two-Factor Auth button at the lower section of this page.



- You will be asked to enter your password before continuing.
- 3. Enter your password and press Continue.

• A prompt will appear with the following steps:



 Download the authenticator app, scan the QR code, and enter the 6digit verification code, then press Activate to enable Two-Factor Authentication.

You just made your account safer!

## CHANGE YOUR PROFILE PICTURE

This article outlines how to change your profile picture. A unique profile picture will help others identify who you are!

1. Select the **User Settings cog** from the bottom left, as pictured below.

![](_page_11_Picture_3.jpeg)

- The user settings menu will open. A list of setting categories will be on the left while an enlarged user profile card will be on the right.
- 2. Select *either* the **Profiles** category on the left (second to top item) or the blue **Edit User Profile** button on the far right.

![](_page_11_Picture_6.jpeg)

• You will be taken to the **Profile Settings** menu.

![](_page_12_Picture_2.jpeg)

- 3. Select *either* the blue **Change Avatar** button or your **current profile picture** on the right.
  - A prompt will appear for you to choose an **Image** or **GIF**. GIFs are only accessible for Discord Nitro subscribers.
- 4. Select **Image** from the prompt.
  - Your device's file explorer or gallery will appear in a separate window and you can choose an image of your liking.
- After you have chosen an image, you will be prompted with the option crop the image. Once cropped to your liking, select **Apply**.
   Select **Skip** at the bottom left of the prompt. Clicking **Cancel** will return you to the image or GIF option from **Step 3** and **Step 4**.

- A prompt will appear at the bottom of the screen with the option to Save Changes or Reset all changes. Once you have set a profile picture to your liking, click Save Changes.
  - Keep in mind this prompt not only applies to your profile picture, but *any* changes you make in your settings!

Your new profile picture will display across all of Discord to all who see it! Wear it proudly.

#### CHANGE YOUR STATUS

Your status is a little tag line by your profile that tells everyone what you're up to! For example, it will list what game you are playing, or, if you have Spotify <u>linked as a third-party account</u>, what music you're listening to! But you can also create a custom status that says whatever you like!

1. Click your **username** at the bottom left.

![](_page_14_Picture_4.jpeg)

- A window will open with a mini profile card and a list of options.
- 2. From the list of options, select **Set Custom Status**.

![](_page_14_Picture_7.jpeg)

• A new window will open in the middle of the screen with an input box to enter your custom status.

3. Enter your custom status into the input box. You can also edit when the status clears, and whether or not you appear as online to other users.

Set a custom status	
WHAT'S COOKIN', LORE2?	
😜 writin' cool help stuff for a final project	⊗
CLEAR AFTER	
Today	~
STATUS	
Online	~
Cancel	Save

- 4. When you are satisfied with your custom status, select the blue **Save** button.
  - The window will close and your status will be updated. You can see your new status display by your username at the bottom left.

![](_page_15_Picture_4.jpeg)

Your new custom status is complete!

#### SET A NICKNAME

A nickname is an extra screen name that is different from your username. Nicknames are often used to help clarify who you are to a group of people without changing your username. For example, you might want to be known as your real name in a server for class, while you might want to be known as your gamer tag in a gaming server. There are two main methods to change your nickname.

#### FROM YOUR PROFILE SETTINGS

 Select the User Settings cog from the bottom left, as pictured below.

![](_page_16_Picture_5.jpeg)

- The user settings menu will open. A list of setting categories will be on the left while an enlarged user profile card will be on the right.
- 2. Select *either* the **Profiles** category on the left (second to top item) or the blue **Edit User Profile** button on the far right.

![](_page_17_Picture_0.jpeg)

- You will be taken to the **Profile Settings** menu.
- 3. At the top of the menu are two tabs. Click the **Server Profiles** tab.
  - The menu will change to display a drop-down list of servers you are in and an input box to input a nickname.

CHOOSE A SERVER
🚥 EH 401 User Help Guide
NICKNAME
lore2

- 4. Select the server you wish to change your nickname in and then type in your new nickname. A nickname can be up to 32 characters.
- A prompt will appear at the bottom of the screen with the option to Save Changes or Reset all changes. Once you have set the nickname to your liking, click Save Changes.

• Keep in mind this prompt not only applies to your username, but *any* changes you make in your settings!

Once you have saved, your nickname will display instead of your username for the respective server you set it for.

#### FROM A SERVER

You can also quickly jump to your **Profile Settings**from a server. This method can be much quicker.

- 1. While looking at a server, right-click your username from *either* a chat receipt or the member list.
  - A drop-down menu will appear.

![](_page_18_Picture_7.jpeg)

- 2. Click Edit Server Profile from the drop-down menu.
  - This will take you to the Server Profiles tab from Step 3 of the From Your Profile Settings instructions above.
  - Follow **Step 4** and **Step 5** to set your nickname.

## MANAGE THIRD-PARTY CONNECTIONS

You can connect third-party accounts to Discord for a number of cool integrated features, such as a music <u>status</u> on Discord for Spotify. Connected accounts will also display on your profile so others can connect with you on those platforms. This article deals with connecting and removing thirdparty accounts.

#### **CONNECTING A THIRD-PARTY ACCOUNT**

1. Select the **User Settings cog** from the bottom left, as pictured below.

![](_page_19_Picture_4.jpeg)

- The user settings menu will open. A list of setting categories will be on the left while an enlarged user profile card will be on the right.
- 2. Click the **Connections** item from the list of categories on the left.

![](_page_19_Picture_7.jpeg)

- You will see a list of third-party accounts you can connect to your Discord profile. The **View More** arrow on the right will display all of the accounts you can connect.
- Select an account to connect. For example, you might want to connect Steam. To connect Steam to Discord, click the Steam logo from the list.
  - A Steam sign in page will open in a new browser window. To connect any account, a window similar to the one below will always open:

![](_page_20_Picture_4.jpeg)

- 4. Sign in to the account you wish to connect to from the browser window that opens.
  - A prompt will indicate that the process is complete.

You have connected a third-party account to Discord! The connected account will be shown on the **Connections** settings page.

#### **REMOVING A THIRD-PARTY ACCOUNT**

If for any reason you wish to remove a connected account, you can do so from the **Connections** settings page. Each connection will be listed on its own card.

1. Click the grey **X** on the top right corner of the card.

![](_page_21_Picture_3.jpeg)

- A prompt will appear to make sure you want to disconnect the account from Discord.
- You can also simply hide the connection from others by clicking the option switch on the card.
- 2. Click the blue **Disconnect** button to finalize.

![](_page_21_Picture_7.jpeg)

The third-party account is removed and will no longer be listed on the **Connections** settings page.

#### ADD A FRIEND

You can keep up with new and old connections on Discord by adding them as friends! There are two main methods for adding a friend.

#### FROM YOUR DIRECT MESSAGES

This is the standard way to add a friend. This method is best for connecting with someone on Discord whom you met outside of Discord.

- Go to the Direct Message menu by clicking on the **Discord logo** at the top right of the app.
  - The main window will change to your **Friends List**. At the top of the window will be a number of tabs.

![](_page_22_Picture_7.jpeg)

- 2. Click the green Add Friend tab.
  - An input box will open below.

ADD FRIEND You can add a friend with their Discord Tag. It's cAsE sEnSitIvE! Enter: a Username#0000	🕒 Friends	Online	All	Pending	Blocked	Add Friend	
Enter a Lisename#0000	ADD FRIEND You can add a fi						
	Enter a Use						

3. Enter your friend's username and press **Send Friend Request**.

- If the username was found, the input box will highlight green and a green message below will indicate a success. If the username is not found, the input box will highlight red and a red message below will indicate an error.
- Make sure to enter their username as depicted. All discord user names are followed by a **#** and **four numbers**.
- You can always find your own username at the bottom left corner displayed like this:

![](_page_23_Picture_3.jpeg)

Note the **#** and **four number** tag under the username.

#### **IN A SERVER**

You don't need to go all the way to the Direct Message menu to add someone as a friend. Maybe you met someone in a server and would like to quickly send them a friend request?

In a server, simply right-click the username of any server member.
 You can do this from *either* a chat receipt or the server member list.

• A drop-down menu will appear.

![](_page_24_Picture_2.jpeg)

- 2. Click Add Friend from the drop-down menu.
  - The window will close and a friend request will automatically send to the user.

Now all that's left to do is to wait for them to accept your friend request!

## SEND A DIRECT MESSAGE

Direct messages (DMs) are a way to communicate with your <u>friends</u> outside of a <u>server</u>. You can have a direct message chat with one person, or a group DM with up to nine other people. This guide outlines how to create a DM with one person. To create a group DM, see "Create Group DM" on page 41.

- Go to the **Direct Messages** menu by clicking the **Discord logo** at the top right of the app.
  - The main window will change to your **Friends List**. On the right will be your **list of Direct Messages**.

![](_page_25_Picture_4.jpeg)

2. From here, click *either* a **friend listed on the right** to instantly open a direct message with that person.

![](_page_25_Figure_6.jpeg)

• If you click on a friend from your Friends List, you will be taken to the DM with that friend.

3. The message bar is found at the bottom of the Discord app. Type in a message and press **Enter** to send!

Happy chatting!

# **CONNECTING WITH OTHERS**

This section covers the basic ways you can connect with others on Discord!

## JOIN A SERVER

The article outlines how to join a Discord server.

1. To join a server, you need to get an invitation to the server. Invitations look like this:

![](_page_29_Picture_3.jpeg)

2. Click **Join**. You will then be taken to the new server.

#### POST AN IMAGE

This article outlines how to upload and share an image on Discord.

1. Click the **Plus Icon** on the left of the message bar.

![](_page_30_Picture_4.jpeg)

2. Select the **Upload a File** option.

3. Locate the image you wish to upload on your computer, and doubleclick it. The image should then be displayed above the message bar.

4. Click enter. Your image will appear in the chat.

## POST A GIF

This article describes how to post GIF files on Discord.

1. Click the **GIF** button on the right of the message bar.

![](_page_31_Picture_3.jpeg)

2. Search for the GIF you want by typing in the search bar.

![](_page_31_Picture_5.jpeg)

3. Once you have found the GIF you want, click on it. It will be automatically posted to the chat.

## REACT TO POSTS

Reactions allow you to react to another person's posts with emojis without needing to post a separate emoji..

1. Mouse over the post you wish to react to, and click on the **Smile Emoji** that appears.

![](_page_32_Picture_4.jpeg)

2. Select the emoji you want to react with from the menu.

![](_page_32_Picture_6.jpeg)

3. The emoji you selected will appear below the post.

![](_page_32_Picture_8.jpeg)

## **PIN A POST**

This article will outline how to pin a post on Discord.

1. Mouse over the post you want to pin, and click the More option.

![](_page_33_Picture_3.jpeg)

#### 2. Select Pin Message.

![](_page_33_Picture_5.jpeg)

3. When the confirmation screen appears, click Oh yeah. Pin it.

![](_page_34_Picture_2.jpeg)

4. A confirmation message will be sent in the chat when the message is pinned.

Discord Help pinned a message to this channel. See all pinned messages. Today at 2:54 PM

## SEARCH FOR OLD POSTS

This article outlines how to search for old posts on a Discord server.

1. Click on the **Search Bar** in the upper right corner of the screen.

![](_page_35_Figure_3.jpeg)

- 2. Type words from the message that you are looking for and hit Enter.
- 3. All messages with those words will be displayed on the right side of the

screen.

![](_page_35_Picture_7.jpeg)

4. Click on a message to jump back to the point where it was posted.
### MUTE A CHANNEL

This article will outline how you can mute a channel on Discord.

1. Right-click on the **name of a channel**. A menu with several options will appear.



2. Mouse over **Mute Channel**. Another menu will appear.



3. Click on the amount of time you want the channel to stay muted. The channel name will turn gray after it has been muted.

### CALL SOMEONE

This article outlines how to call someone on Discord.

1. Go to Messages, and select the person you want to call.

2. Click the **Start Voice Call** or **Start Video Call** buttons on the upperright.



3. There will be two different screens that will appear if the call is successful, depending on if you made a Voice Call or Video Call.

• If you made a Voice Call, this screen will appear, showing that you are calling the person.



• If you made a Video Call, Discord will display your webcam, along with the webcam of a person who accepts your call.

# CHANGE SOMEONE'S VOLUME

This article outlines how to change someone's volume in a Discord Voice Channel.

1. Right-click on the person you want to adjust the volume of.

2. Move the **User Volume** slide left or right to increase or decrease the person's volume.

Profile
Mention
Message
Call
Add Note
Add Friend Nickname
User Volume

### MUTE AND DEAFEN IN VOICE CHANNEL

This article will outline how to mute and deafen yourself in Voice Channels on Discord.

#### HOW TO MUTE

1. While in a Voice Channel, click the **Mute** button to the right of your profile at the bottom-left corner of your screen.



2. The mute button will get a red slash across it, and a smaller version of the muted symbol will appear by your name in the voice channel.



### HOW TO DEAFEN

1. While in a Voice Channel, click on the Deafen button on the fight of your profile at the bottom-left corner of your screen.



2. The deafen and mute buttons will get a red slash across them, and smaller versions of the deafened and muted symbols will appear by your name in the voice channel.



### SHARE A SCREEN

This article outlines how to share your screen with others on Discord.

1. In order to share your screen with others, you have to join a voice channel.

2. Click on the **Share Your Screen** button located above your profile on the bottom left of your screen.



3. Select the screen you wish to share from the menu, and click Go Live



4. There will be a red Live icon next to your name.



# SET DIRECT MESSAGES TO 'FRIENDS ONLY'

This article outlines how to only receive Direct Messages from friends.

1. Go to User Settings, and click on Privacy and Safety.



#### 2. Click on Allow direct messages from server members



#### 3. Click Yes on the confirmation screen.



#### 4. The check mark should slide to the left and become a gray x.

 SERVER PRIVACY DEFAULTS

 Allow direct messages from server members

 This setting is applied when you join a new server. It does not apply retroactively to your existing servers.

### CREATE GROUP DM

This article covers how to create a group Direct Message.

1. Go to your Friends List, and click the New Group DM button in the top

right.



2. Search or scroll for up to nine friends that you wish to add to the Group DM.



3. Click **Create Group DM**. You will be taken to the new Group DM.

# SERVER MANAGEMENT OVERVIEW

This section covers server management, including how to create a server, invite others to join, and make it functional!

## CREATE A SERVER

Servers are a place where you and others can communicate. Through voice, text, or video, servers are easy to join and navigate. Before you can be a part of one, first lets talk about creating one!

1. Looking at the main Discord page, the **bottom left side** of the screen has a plus sign enclosed in a circle.



2. Clicking on the circle will bring up a menu. The menu includes templates of pre-made servers or an option to make your own.

Create a serve Your server is where you and your friend yours and start talking	<b>r</b> ds hang out. Make g.		
Create My Own	>		
START FROM A TEMPLATE			
Gaming	>		
🐝 School Club	>		
Study Group	>		
Have an invite already?			
Join a Server			

 After deciding your option, you will be asked who the server is for (friends or a larger community) and to name it.

Tell us more about your set In order to help you with your setup, is your new just a few friends or a larger communit	rver × v server for zy?	Customize your server Give your new server a personality with a name and an icon. You can always change it later.
For me and my friends	>	
For a club or community	>	SERVER NAME
Not sure? You can skip this question for nor	w.	By creating a server, you agree to Discord's <b>Community Guidelines</b> .
Back		Back Create

4. Finish these steps and the server is complete!

# SENDING INVITATIONS

In order for a server to flourish, it needs people in it! You can easily invite others to join your server. You can do this two separate ways.

### THROUGH THE SERVER

1. By either **left or right clicking the server name**, a menu will appear with an **Invite People** option.



2. Either method leads to the same invitation screen. You can either invite a friend through the app or copy a link to send outside of

#### Discord.



#### THROUGH A USERS NAME

 If you right click on a users name, a menu will appear. Navigate to Invite to Server and you can invite someone to your server.



### CREATING ROLES

Roles allow different people in the server access to a certain amount of control. Whether it is just the ability to chat, complete administrative ability, or somewhere in between, roles are particularly useful for managing large servers.

- 1. We need to enter the Server Settings to create roles. There are two separate ways to reach the **Server settings menu**.
  - You can select the server name at the **top of the screen**, and chose **Server Settings**.



• Alternatively, **right clicking the server name** opens a drop down where server settings can be accessed. This method

takes you directly to the roles section.



2. Once in the Server Settings, navigate to Roles on the left side of the screen.

EH 401 USER HELP GUIDE Overview <b>Roles</b>	<b>Roles</b> Use roles to group your server mer			× ESC
Emoji Stickers	Default Permissions     @everyone • applies to all se	erver members		
Widget Server Template Custom Invite Link	Search Roles Members use the color of the high permissions?		Create Role	
APPS Integrations App Directory	ROLES - 1	MEMBERS O 🛓		

3. Selecting **Create Role** opens another menu that allows you to edit the new Role.

← ВАСК	+	EDIT ROLE	E — CAPTAIN		•••	$\times$
captain		Display	Permissions	Manage Members (0)		
@everyone		ROLE NAME				
		captain				
		ROLE COLOR				
		Members us	e the color of the h	ighest role they have on the roles	list.	
		ROLE ICON	🖲 LVL 2			
		Upload an in recommend highest role	nage under 256 KB at least 64x64 pixe if they have multipl	or pick a custom emoji from this s ls. Members will see the icon for 1 e roles.	server. We their	
		₽ţ	Choose Imag	je		
		0	Wumpus 🛃 Toda rocks are really c	y at 2:25 PM Id		

4. You can edit different aspects of the role, such as the username color, role title, and permissions, as well as those who have the role.



## CREATE CHANNELS

So, you have a server. How can people chat there? There a different sections called channels where people can talk about a variety of things. Usually a server will divide channels based on topic. Voice channels are also an option to use. You can add channels a few separate ways.

#### **USING THE CHANNELS SECTION**

 On the left side of the server page, there will be a text channel section and a voice channel section. Each has a gray plus sign that allows you to add channels of you choosing.



2. Selecting either of the pluses leads to the same menu. Whatever section you selected, the channel will be added there.



3. Now you can add channels to your heart's extent!



### SELECTING FROM THE SERVER OPTIONS

1. On the **top of the screen**, the name of the server has a drop down menu with various options.



2. Selecting the **Create Channel** option leads to the menu from the Using the Channels Section above!

### **RIGHT CLICK BACKGROUND**

1. The **same left side** as before, you can **right click on the background**anywhere the channels are listed.



2. Select **Create Channel** and our familiar new channel menu will appear!



### CREATING CHANNEL CATEGORIES

Discord allows users to group certain channels together. This can be useful for servers that are large and cover several different topics. There are two base categories when you create the server. You can accomplish this task in two separate ways.

#### SELECTING FROM SERVER OPTIONS

1. On the **top of the screen**, the **server name** pulls up a menu of different options



2. Select Create Category and a menu will appear.



3. Now you have a new category to fill with relevant channels!

### **RIGHT CLICK BACKGROUND**

 On the left side of the screen, right clicking anywhere on the background will pull up another menu for adding to the server.



2. Selecting the **Create Category** option pulls up the menu from the **Selecting From Server Options** 



3. You will be greeted with the same Create Category menu as before!

### DELETE A CHANNEL

Perhaps a channel you make is no longer relevant. When you need to remove a channel, it can done with two easy steps.

1. Right Click a channel name to pull up the channel menu.



2. Select **Delete Channel**and a prompt will appear, making sure you want to delete the channel.



3. Confirm the action and the channel will be gone!

# LOCK A CHANNEL

Say you and some friends are preparing a surprise party for someone in the server, and need a discrete location to discussion details. Discord allows you to limit who has access to a channel.

1. Right click the channel name, and select Edit Channel.



2. On the left side of the screen, maneuver to Permissions.



3. Once here, you can set a channel to Private and restrict access to certain members or roles.

<b>Private Channel</b> By making a channel private, only select members and roles will be able to view this channel.	•••
WHO CAN ACCESS THIS CHANNEL?	Add members or roles
ROLES	
😑 captain	Administrator 🔞
MEMBERS	
Sovian Jovian#5792	Server Owner 🛛 🛞

4. Save the changes and you can plan the party without any issues!

# HIDE A CHANNEL

Channels can be hidden for a certain amount of time. There are several ways this can be useful, like silencing a busy channel while you focus on other tasks. Hiding a channel can be quickly accomplished.

1. Right click the channel name, and select Edit Channel.



2. The menu opens to the Overview tab, which has a section that allows you to hide a channel for a certain amount of days.

HIDE AFTER INACTIVITY	
3 Days	^
1 Hour	
24 Hours	
3 Days	
1 Week	

3. Now you won't have distracting notifications from a busy channel!

### BANNING SOMEONE FROM SERVER

Sometimes, a person in the server needs to be gone. Luckily, Discord allows you to ban a user so they can never rejoin the server. You can do this two separate ways.

#### IN THE SETTINGS

- 1. In the Server Settings, there is a section labeled Members.
  - a. Server Settings can be accessed by left or right clicking the
     Server Name at the top of the screen.



2. Once in the settings, navigate down the left panel to Members.



3. By either **right clicking the user name** or **selecting the three dots** that appear when you hover over their name, a menu appears that allows you to ban a user.

•			
•	Mute		
	Disable Video		
	Change Nickname		
L	Kick		
L	Ban		
L	Roles	>	
	Transfer Ownership		

#### SELECTING THE USERS NAME

 The second way to ban someone requires you to directly right-click on the users name. This can be anywhere the users name is shown. Doing so pulls up a menu with the option.

