+Rescue by LogMeIn

Getting Started with Calling Card

Overview for Administrators and Technicians

Calling Card gives employees, customers, and other end users the power to launch a remote support session with the single click of a desktop shortcut. All it takes is a simple one-time download and installation by individual users. Once it's on their desktop, they'll be able to kick off a remote support session and connect with support technicians in seconds.

As an administrator or a technician, you have the ability to generate Calling Card installers and decide who among your

end users can deploy them. This gives you total control over who has an instant connection to your remote support capabilities, from employees to customers.

The Calling Card feature can be downloaded as an MSI installer from your company's website. Technicians can either save the MSI installer on a network for manual distribution, or they can silently deploy it from the Technician Console during their first Rescue session with the customer.

How to Customize Calling Card for Your Company

Choose Your Channels
You can assign your Calling Cards to specific channels to help route requests appropriately and efficiently. By structuring channels based on the support levels within your support center, you can help deliver the type of assistance that specific users need, and ensure that they see the right response fast.

Brand Your Calling Card
You can customize Calling Card's text, logos, images, and color schemes to reflect your company's brand, including the icon that appears on end users' desktops. Calling Card also gives you the ability to design form entry criteria for the initial Calling Card connection and setup, so you can tailor it to the details that your business needs to deliver effective support.

How to Get Started

Step 1:
Generate a Calling Card

- On the Organization Tree, select the channel for which you'd like to generate a Calling Card.

- Select the Channels tab and scroll to the Generate Calling Card for this Channel section.

- Give the Calling Card a meaningful name via the "Installer Name" box.

  Tip: In large organizations with many Calling Card installers, always create meaningful installer names to help identify different installers.

- Click Generate.

- Run the .msi file to install it on the local machine or save the .msi file to a folder on the local machine or on a network for later manual distribution. You'll see the Calling Card details on the Channels tab.

Tip: *Using Multiple Installers*

Every installer is linked to a particular channel. However, administrators can track sessions based on different installers by generating multiple installers for the same channel.

This may be useful, for example, if you have two Technician Groups and you want to measure how many sessions are launched from each group's installer. The two Technician Groups will have two different Referral IDs for their Calling Card. Both of the groups then start to deploy Calling Cards and you are then able to see how many sessions originate from each deployment.

Similarly, you may want to use two website landing pages for your installers. By using separate Referral IDs, you can track which one is used more often, based on the number of sessions started.

Step 2:
Give a Technician Permission to Deploy the Calling Card

Before you can activate a Calling Card, you'll need to give a Technician Group permission to deploy it.

- On the Organization Tree, select the Technician Group you want to work with.

- Select the Organization tab.

- Under Permissions, select Deploy Calling Card.

- Click Save Changes.

Step 3:
Apply a Calling Card Installer to the Technician Group

Once you've selected a Technician Group, you'll need to apply a Calling Card to that specific group prior to activating it.

- On the Channels tab in the Generate Calling Card for this Channel section, copy the Referral ID of the Calling Card you want to apply.

- On the Organization Tree, select the Technician Group you want to work with.

- Select the Organization tab.

- Scroll to the Apply Calling Card section and enter the referral ID into the Installer Referral ID field.

- Click Save Changes.

Any technician in the Technician Group will be able to deploy the Calling Card via the Technician Console.

Step 4:
Customize the Calling Card Applet

- Select the Calling Card tab.

- Edit the following options (see chart below), as required.

- Click Save Changes.

Note: The name of your organization will appear on the Calling Card as entered in the Organization field of theMy Account > Modify Contact Information page. The "Powered by LogMeIn Rescue" logo cannot be customized.

Tip: Regenerating installer and applying updates

After making changes, use the Regenerate button on the Channel tab to regenerate the installer. This will use the same referral ID as before. You will not need to inform your customers of the update, because the Calling Card application will automatically be updated when started. The exception to this is if you place the installer somewhere on your website for your customers to download. This installer will not be updated. However, once it is downloaded and run by your customers, it will then be automatically updated. If the original installer is deleted, use Regenerate to reinstall an identical copy of the installer onto your local hard drive.

Option	Description
Application name	How the Applet will be named on the user's device. Choose a name that is easy for your customers to identify with your organization.
Menu Bar color, text color	These settings determine the color of the menu bar and the text that appears in the bar. It is important to ensure that these two colors contrast highly to ensure the text is clearly visible.
Border	Set the color of the border and its width in pixels.
Footer	Set the color and height of the footer in pixels.
Icon file	The icon that a customer will click to open the Calling Card. Maximum file size is 50 kilobytes. File format must be .ico.
Logo	The logo shown in the top-right corner of the Calling Card once the connection to the technician has been established. Download the template to see a sample that conforms to all format requirements.
Header image	The header image shown at the top of the Calling Card. Maximum file size is 100 kilobytes. File format must be .bmp, .png, or .jpg.
Background	The image shown in the background of the Calling Card. Maximum file size is 100 kilobytes. File format must be .bmp, .png, or .jpg.
Help URL	You may want to provide instructions to your customers regarding the Calling Card. The Help URL should point to these instructions.
Disable Help URL	Select this option if you do want to display the Help menu item on the Calling Card.
Footer text and links	There is space in the Calling Card footer to include up to five hyperlinks to other websites. You should keep the text as brief as possible since line space may become an issue if you use all five links or long link names.
Terms and Conditions	Use the Terms and Conditions fields to set up a custom link to your organization's Terms and Conditions or other legal text.

Option	Description (continued)
Text before form	Use these fields to specify up to three lines of text that will be seen at the top of the Calling Card. Example: "Please fill in all fields and click Connect to contact a technician."
Text after form	Use this field to specify one line of text that will be seen at the bottom of the Calling Card Connect to Remote Support dialog box. Example: "Thank You!"
Custom fields	Choose which input fields to include in the Calling Card interface. Custom Fields are named on the Global Settings tab.
	Note: Select Retain text to preserve values entered by the customer. That is, the next time the customer starts the Calling Card, previously entered values will be retained.
Code lines	On the PIN code connection page, you can specify up to three lines of text to explain to the user what he must do to complete the form correctly. Example: "Please enter the 6-digit PIN code provided by your technician."
Supported connection methods	Calling Card can be used to initiate channel sessions, PIN code (Private) sessions, or both.
Default connection method	Set the connection method to be displayed by default when the Calling Card is opened. If both connection methods are active, the customer will be able to switch between methods using the Connect menu on the Calling Card.
Company ID validation	Select this option to ensure that the Calling Card only accepts PIN codes created by the same support organization that installed the Calling Card. The Company ID validation option is selected by default.

Step 5:
Deploy the Calling Card to a Customer's Computer

Follow this procedure to install the Rescue Calling Card on a customer's computer during an active session. A technician installs the Calling Card to the customer's PC or Mac from the Technician Console. First, check that your setup meets all the requirements below.

Requirements:

1. The agent's Technician Group must have permission to deploy the Calling Card.

2. A Rescue Administrator must have already applied a Calling Card to the agent's Technician Group.

3. The session must be Active.

Once you've confirmed that your setup meets these requirements, proceed with the following:

- Click the Calling Card tab.
  Remember: *This task is performed in the Technician Console.*

- Select one of the following options:

  Select **Launch Calling Card immediately after installation** if you want the Calling Card application to run once it has been successfully installed on the customer's computer.

  Select **Launch Calling Card every time the remote device is started** to set the Calling Card application to open each time the target device is started.

Tip: Customers can clear this setting on the Settings > General tab of the Calling Card.

- Click **Install Calling Card.** The Calling Card installer is deployed and executed. The customer may be prompted to give you permission to deploy the installer. If so, ask the customer to accept the deployment.

Once installation is complete, the customer will be able to initiate sessions via the Calling Card.

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