



## **Support Center User Guide**

Installing, Managing and Using Support Center  
Version 7.0

# Welcome!...

Welcome to eBLVD Support Center.

eBLVD Support Center instantly turns a web browser into a complete web-based help desk and trouble-ticket system. Now you can easily manage and control your customer's technical problems; and remotely access their computers online to quickly resolve their technical issues.

Support center is designed for IT professionals, consultants, support providers, software companies, accountants, and anyone who needs to quickly and effortlessly manage trouble tickets, users, computers, or servers.

From anywhere in the world -- your home, hotel room or office, to anywhere in the world -- you can be instantly notified of support issues and access computers online to quickly resolve technical problems.

This User Guide for Administrators and Customer Support Representatives (CSRs) covers setting up and using eBLVD Support Center®.

In just a few minutes, you'll be equipped to start supporting customers anytime, anywhere.

Let's get started.



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# Let's Get Started

eBLVD Support Center® is a web-based solution for attended and un-attended remote support.

Administrators will create their accounts at <http://eBLVD.com>. Once set up, an **Administrator** will then set up their Customer Service Representatives (CSRs) and **global preferences**. It generally takes less than 5 minutes to set up an account and start supporting your Customers.

CSR's are provided instructions on how to sign in and support customers by the Administrator. The URL for administrators and CSRs to sign in is <https://www.eBLVD.com>. Once set up, your customers can then request assistance at your **support portal**.

Your customers request assistance via a customizable "support request page" or inbound phone call. From this page, your customer fills in some details about their problem. The support applet automatically loads to gather additional technical data and enables a support technician to contact them and access their PC.

The customer's pre-assigned technician is instantly notified with the auto-generated "trouble ticket." Already equipped with the user's problem description and technical info, a single mouse-click connects him to the problem PC to diagnose and resolve. Your customers will enjoy a new level of service as they experience first-contact resolution and real-time collaboration with screen, file, mouse and keyboard sharing.

Once the **CSR** is connected to the customer's PC he has a set of reporting and incident resolution tools at his disposal, giving him the same capabilities as if he was sitting in front of the customer's PC. As long as both the CSR and the customer have a working connection to the Internet, the physical distance between them is inconsequential.



If needed, the technician can instantly hand-off or “elevate” the trouble ticket to someone else for help. Your support staff can even work with several customers simultaneously. Also, every customer support session can be recorded for training or auditing purposes.

Once the problem is resolved, the applet uninstalls, the ticket closes, and it's on to the next customer. Subsequently, a custom, post-ticket “survey” can poll the customer about the experience. These responses can be aggregated for performance measurement and monitoring purposes.

You can provide service even when your customers are away from their computers. All sessions are totally secure with end-to-end 128-bit encryption.

eBLVD Support Center® can be configured to reflect any support organization; from one CSR, to teams of CSRs with different responsibilities and capabilities.



# Product Features

- **Intuitive User Interface:** Easy-to-use web interface enable you and your customers to open and resolve trouble tickets in seconds without training. Your support staff will spend less time on the phone and more time working on customer requests.
- **Automatic Notifications:** Your customers can easily submit issues on their own and you will automatically receive notification of these requests via the web, PDA, phone or pager.
- **Instant Escalations:** Instantly escalate any trouble ticket to another Customer Service Rep.
- **Remote Access and Control:** Securely troubleshoot and resolve hardware and software issues in real time.
- **User-defined Surveys:** Easily measure any metric using our customizable "surveys" feature, or use the supplied templates to collect and report on Organization, Group, or CSR performance.
- **True 24-Bit Color:** Share presentations, graphics, pictures and PC applications with all customers in true **24-bit color**.
- **Desktop Session Recording and Playback:** Allows CSRs to record and play back support sessions for training, performance reviews, or as an audit trail.
- **System information retrieval:** View detailed information about a customer's computer, including information about the operating system, network, hardware, and Web browser.
- **Chat Window:** Chat online with your customer during a support session.
- **File Transfer:** Transfer any type of file to and from a customer's computer.
- **Integration:** Easily initiate eBLVD support tickets through various email and web-based applications.
- **Technician Notes:** Automatic and manual entry of technician notes tracks customer issues every step of the way.
- **Reporting and Activity Logs:** Get detailed reports on all requests for trend analysis and **ROI** validation.
- **Unattended Access:** Access PCs and servers after hours for maintenance and troubleshooting without service interruption.
- **Flexible Licensing:** Purchase only the licenses you need today and add additional licenses as you need them.



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# Security

eBLVD Support Center® addresses your security concerns:

- There is no need to open any extra ports on your corporate or personal **firewall**, as all communication between the CSR and the customer's PC make use of standard web protocols (HTTP and HTTPS).
- An encrypted connection is established between CSR and customer, using established Internet protocols (128-bit **SSL**).
- Support sessions are initiated by the customer: a CSR cannot examine a customer's PC without being invited to do so by the customer.
- Once the support session has ended, all access rights to access the customer's PC are removed.
- The CSR management model makes it possible to limit specific support sessions to certain CSRs. For example, support requests from certain users having critical data on their PCs could be offered only to senior support CSRs.
- Sessions can be recorded to provide an audit trail of a CSR's actions.
- Nothing is permanently installed on the customer's PC. A small Applet is downloaded (< 500K) when the session starts and is removed when the session ends.
  1. The only exception to this is in the case of a customer who will need frequent support.
  2. In this case, the Host Applet can be left installed on the machine, but it is the customer who instigates each subsequent support session using the Applet.



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# System Requirements

There are some minimum system requirements for the CSR and the customer PCs, which are as follows:

## CSR PC

- Microsoft Windows 9x, ME, 2000, XP, Server 2003, 2008, Vista, 7.
- A working Internet connection (minimum recommended speed 56Kbits/sec, if performing remote control or remote viewing).
- Internet Explorer 5.5 or later, with support for 128-bit **encryption**. Mozilla-based browsers that are compatible include Firefox 1.5 or later, and Mozilla 1.7 or later.

## Customer (remote) PC

- Microsoft Windows 9x, ME, 2000, XP, Server 2003, 2008, Vista, 7.
- A working Internet connection (minimum recommended speed 56Kbits/sec, if allowing CSRs to view or control your screen).
- A web browser that supports 128-bit **encryption**. Note: The speed of file transfers, among other things, is determined greatly by the speed of the Internet connection, we recommend a minimum upload capacity of 128Mb/s.



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# Terminology

Throughout this guide we will use various terms. Some definitions are listed here in alphabetical order:

- **Administrator** - A user who has the authority to create, maintain and monitor one or more groups of CSRs.
- **CSR** - Customer Support Representative. A person who monitors queues for incoming requests, picks up requests and handles customers' problems.
- **CSR Console Applet** - The eBLVD web-based client application that makes connecting, viewing, and controlling a customer's remote host PC possible.
- **CSR Support Center Console** - A web site that provides the user interface for CSRs using the eBLVD Support Center® system. Support tickets can be picked up or generated by CSRs and many incident resolution facilities, such as PC diagnosis and remote control, can be used during the session.
- **Co-branding** - An eBLVD account can be co-branded to display the User's company or personal logo and colors. When this has been set up, your customers will see your logo and colors, instead of the eBLVD brand when they access eBLVD.
- **Customer** - A person who has requested assistance.
- **Customer Host Applet** - A small application that a customer must download and run to conduct a real-time support session using the eBLVD system.
- **Customer Service Representative (CSR)** - A person or technician who provides support.
- **Direct URL Link** - A link that a CSR can send to a customer, which, when clicked by the customer, can result in a session being initiated.
- **New Ticket** - A support ticket initiated by a customer, but has not yet been picked up by a CSR.
- **Open Ticket**- A ticket that has been picked up by a CSR. The support request is currently being worked on by a CSR.
- **Permissions** - What the CSR is allowed to attempt to do on the customer's PC. The customer can always prohibit a CSR's action.
- **Picking Up a Ticket**- The act of a CSR starting work on a new ticket.
- **Preferences Page** - The place within eBLVD Support Center® from where Administrators perform their functions; defining CSRs; generating reports; and making global configuration changes.
- **Remote Control**- The CSR taking over control of the customer's PC. The customer's screen is shown to the CSR and the CSR's mouse and keyboard control the customer's PC.
- **Remote Viewing** - The CSR viewing the screen of the customer's PC. The CSR can only view the screen, and the CSR's mouse and keyboard do not control the customer's PC.
- **Report**- An overview of one of many areas of performance over a specified time period.
- **Requesting Assistance** - The act of a customer requesting support by selecting a menu choice or clicking a link on a web page. The request is seen by the CSR as a new ticket.
- **Session or Support Session**- An interactive online session with a customer. The CSR is connected to the customer's PC using the Console Applet and can view, control, transfer files, and chat with the customer in real-time.



877-GET-eBLVD • www.eblvd.com

- **Support Queue** - A list of support tickets found in the CSR Support Center Console.
- **Support Ticket** - A request for support that has been initiated by a customer. The ticket appears in the queues with a status - New, Open, or Closed.



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# Organization Structure

eBLVD Support Center® has been developed with both small and large support organizations in mind.

You configure the eBLVD Support Center system to mirror your support organization by setting up access for each **Administrator** and **CSR**, as well as set up **global configuration** parameters for your Company.

Before configuration, please make sure you are familiar with the following terms:

**Organization** - A given organization must have at least one Administrator, but can have an unlimited number of Administrators, each managing their own group of CSRs.

**Administrator** - There must be one Administrator per group of CSRs. Note: in the simplest configuration, the Administrator and the CSR are the same person and no additional set up is necessary.

## *Administrator Role*

An Administrator manages one or more CSRs, and is responsible for creating and maintaining additional CSRs as well as setting preferences for the account. The Administrator is the only user allowed to make global configuration changes, such as **co-branding**, or allowing CSRs to view each other's tickets.

Administrators have a **username**, a password, full name, and an email address. The username is how the Administrator is shown, and in conjunction with a password is used for logging in.

The roles of the Administrator are:

- Maintaining the CSRs and CSR Groups for which they are responsible
- Setting permissions for CSR Groups
- Disabling any CSRs and CSR Groups if necessary
- Generating reports for the organization or individual CSRs
- May also support customers

**CSR** - One or more persons who monitor queues for incoming requests, picks up requests and handles customers' problems.

A CSR must belong to an Administrator account, and his permissions are determined by the Administrator.



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

A CSR is created by an Administrator. CSRs are identified by a **username**, password, full name, and email address. The username is the name the customer sees as being the CSR assigned to his ticket.

The username and password are used by the CSR for login purposes.

An Administrator can disable a CSR's account at any time, meaning the CSR can no longer log in, and therefore can no longer support customers. The roles of a CSR :

- Support customers when tickets or calls arrive
- Transfer tickets when necessary
- Other tasks as dictated by the Administrator



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# Setting up Your Organization

eBLVD Support Center® can be used equally well with a simple organization, like this:

- Administrator and CSR are the same

...or a more complex organization, like this:

- Administrator -> CSR1 CSR2 CSR3 ...

...or even this:

- Organization
- Administrator1 -> CSR1 CSR2 CSR3 ...
- Administrator2 -> CSR2-1 CSR2-2 CSR2-3 ...
- Administrator3 -> CSR3-1 CSR3-2 CSR3-3 ...

To set up the organization in eBLVD Support Center® [for each Administrator]:

1. Log in to <https://www.eBLVD.com/> using the Administrator **username** and password assigned to you when you activated your eBLVD Support Center® account.
2. On the eBLVD Support Center® Console you will see:

The screenshot displays the eBLVD Support Center console. On the left is a sidebar with the eBLVD logo, a 'Ticket Search' section with a 'Reference Number' input field and a 'go' button, and a 'Toolbox' with links for 'Manage Tickets', 'Manage Setup Codes', 'Manage Surveys', 'Manage Contacts', 'Ticket History Report', and 'Configure Cobranding'. The main area is titled 'Support Tickets' and features three tabs: 'My Tickets', 'New Tickets', and 'Closed Tickets'. Below the tabs is a table of tickets with columns for Status, Name, PC Name, and Created. The table shows 8 open tickets, all with 'Unassigned' PC names and creation dates in May 2010. The table is paginated to 'Page 1 of 1'.

Status	Name	PC Name	Created
Open	Rob Frost	Unassigned	May 01, 2010 2:42 PM
Open	George Nixon	Unassigned	May 01, 2010 2:42 PM
Open	William Jefferson	Unassigned	May 01, 2010 2:41 PM
Open	Joan Abercrombie	Unassigned	May 01, 2010 2:41 PM
Open	Mary Smith	Unassigned	May 01, 2010 2:41 PM
Open	George Shaw	Unassigned	May 01, 2010 2:41 PM
Open	Mike Robinson	Unassigned	May 01, 2010 2:40 PM
Open	Bill Berry	Unassigned	May 01, 2010 2:39 PM

If you have multiple CSRs: On the navigation bar at the top of the screen you will see the "User Accounts" link. Click the "Create New User" icon to add the desired number of CSRs for this account. You will also see the **global configuration** preferences for all the CSRs under this Administrator.



# Global Configuration Preferences

Global configuration preferences are Administrator settings that control the visual and functional aspects of the service. The global preference options are:

- **Configure co-brand settings:** This is where you configure your co-brand settings.
- **Default start page:** Here, you set the default page you will be taken to after logging in to your account.
- **New Ticket Notification:** If enabled, the **CSR** responsible for the account will receive an email notification whenever a customer initiates a new ticket by requesting assistance via a previously installed **Host Applet**, or via your support portal: [http://support.eblvd.com/\[username\]](http://support.eblvd.com/[username]). These email alerts could then be redirected to cell phones, pagers, PDAs and other portable devices.
- **Notification Format:** Receive text-only email notifications
- **Instant PC Setup:** When enabled, your clients may instantly download and install the Host Applet without your assistance, by filling out the "Request Assistance" form on your support portal: [http://support.eblvd.com/\[username\]](http://support.eblvd.com/[username]) . If this setting is not enabled, you will need to manually provide a **Setup Code** for your customers, either by email or over the phone, before you can initiate a support session to their PC.
- **Attended Access Only:** When enabled, your clients must be physically present at their PCs to grant permission to allow the CSR to access and control their PC. This permission must be granted for each session that the client or CSR initiates. When disabled, the CSR may set a password for this client to enable 7/24 access to this host. The client does not have to grant permission for the CSR to access and control the PC.
- **Automatically Send Survey:** Surveys are useful for compiling service data and feedback to measure Organization or CSR performance. This option specifies which CSR survey to automatically send to the client when a ticket is closed.



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# CSR Permissions

The Administrator defines the permissions that apply to all CSRs within that account.

The permissions are:

- Allow CSRs to create their own PC groups
- Allow CSRs to view PCs in other CSR accounts
- Allow CSRs to report on PCs in other CSR accounts
- Allow CSRs to install the Outlook Add-In



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# Managing Trouble Tickets

Once your organization, **global configuration** preferences, and CSRs are configured, your online **support portal** is ready to accept and manage trouble tickets.

Your **support portal URL** is [http://support.eBLVD.com/\[username\]](http://support.eBLVD.com/[username]), where **username** is the eBLVD username of the responsible **Administrator** or **CSR**. Every web page on your support portal is co-branded with your logo and colors, and will behave based on your configuration. You can change your configuration at any time.

Your customers can open trouble tickets themselves from your support portal. When tickets are opened, you'll automatically receive notification via the web, PDA, phone or pager.

Note: You can also open tickets from your **Support Center Console**, or by directing your customers to your support portal, or providing them a **Setup Code** or **Direct URL Link**.

Note: For customers requesting frequent assistance, you can decide to put them in a "previously-installed" status, which allows you to easily create subsequent tickets and instantly re-access their system(s).



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# My Support Portal

Your support portal is located at [http://support.eBLVD.com/\[username\]](http://support.eBLVD.com/[username]). You can place this link on your web site, or provide your customer the link in your documentation or application.

The screenshot shows a web interface for requesting assistance. On the left is a sidebar with a logo placeholder and two main sections: 'Direct Download' with a link to 'Install the Software' and 'CSR's / Administrators' with a 'Sign-In' link. The main area is titled 'Request Assistance' and contains a form with the following fields: 'Your Name' (Robert Riordan), 'Your Email' (rob@riordan\_mfg.com), 'Phone Number' (212-233-2233), and 'Best Time to Call' (Anytime). Below these is a text area for the 'Assistance Request' containing the text: 'My PC was working yesterday, but now when I power it up and sign in to Windows, I can't see the START button?!'. At the bottom of the form are 'continue' and 'cancel' buttons.



# Using a Setup Code

This is the simplest way to open a ticket and start a session. It is most applicable if a CSR has already been communicating with the customer.

The CSR creates a 6-digit **Setup Code** and provides it to the customer by phone or email.

The customer goes to a standard URL (either [http://support.eBLVD.com/\[username\]](http://support.eBLVD.com/[username]) or a custom web page you create yourself) and enters the Setup Code. The session is then initiated.

The support ticket will automatically be assigned to the CSR who created the Setup Code. Setup Codes are ideal for ad hoc support requests and don't require an email message.

## CSR Usage

1. Log in as a CSR
2. Click the Generate Setup Code icon
3. Enter a name, password, and Description for this customer ticket
4. You can optionally send this code via email. Checking this box will allow you to enter an email address for your customer. The customer will receive an email containing the setup code, instructions, and a link to your support portal to activate via Setup Code.
5. Click the Continue button
6. Note the 6-digit Setup Code
7. Relay the Setup Code to the customer
8. The ticket immediately goes into the Pending Host Installations queue. Once the customer has entered the Setup Code, the ticket will appear under the Open Ticket Queue in the CSR Web Console.



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# Using a Direct URL Link

This method is applicable if a CSR has already been communicating with the customer.

The CSR sends an email containing a support link to the customer. When the customer clicks the link in the received message, the session is initiated. The support session will be assigned to the CSR who created the email.

## Administrator Usage

The Administrator has some control over the default behavior from the Configure Preferences Page (see Changing Global Configuration Parameters).

## CSR Usage

1. Log in as a CSR
2. Click the Pending Host Installations icon
3. Click the Setup Remote Host icon
4. Enter a name, password, and Description for this customer session
5. Enter the customer's email address
6. Add text in the message box that you want to send to your customer
7. Relay the Setup Code to the customer
8. Click Continue to send the message to the customer. A ticket will be added to the New Ticket Queue. Once the customer has clicked the link in the received email, the ticket will move to the Open Queue in the CSR Support Center Console.



# Using a Previously Installed Host Applet

This method is applicable if a CSR from the organization has previously worked with the customer.

The **Host Applet** is a standalone application that can best be described as a hotline for your regular customers to contact you whenever they need support.

Instead of having to download the Host Applet every time they need help, your customers simply open the Host Applet by clicking on a Quick Launch or Desktop icon, Select "Request Assistance" from the host menu, fill in the details and connect directly to the responsible CSR.

For the support organization, this results in improved customer service by providing customers with a convenient and instant method for requesting support.



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# The CSR Support Center Console

The CSR Support Center Console is where the CSR manages support sessions and performs support actions. The Console can be accessed from any PC on the Internet by any web browser.

When a CSR logs in to eBLVD Support Center®, he will automatically be taken to the CSR Support Center Console. The first time a CSR logs on from a particular PC, a small software client is offered for downloading. By accepting the offer, the CSR Support Center Console applet is installed.

The console consists of the following areas which are identified in the screen-shot below:

## **Ticket Queue Manager**

The Ticket Queue Manager provides a list of Open tickets, including the name of the customer, ticket creation date, and ticket status. The Queue Manager is where you can: see which customers are waiting for support; pick up a support request; transfer a support session to another CSR; and close a support session.

## **Toolbox Menu**

The Toolbox menu gives access to a menu from which you can:

1. Open a New Ticket
2. Pick up a New or Open Ticket
3. Transfer a Support Ticket  
If you have a session that you would like to transfer to a colleague - maybe because he has more experience of a specific subject, or has more permission to perform actions on the customer's PC than you have - simply click "Forward Ticket" and select the CSR that you would like to pass the ticket to.
4. Generate a Setup Code
5. View Pending Host Installations
6. Manage Your Surveys
7. Generate a Ticket History Report
8. Launch the Configure Preferences Page (if you are an Administrator)
9. Make changes to your eBLVD Support Center® account
10. Get on-line help
11. Exit your browser and close all sessions



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# Resolving Trouble Tickets

**Ticket Resolution Page** - The Ticket Resolution Page is where you will perform the majority of your support activities. Each **Open Ticket** has its own Ticket Resolution Page that you can switch to by selecting the "View" option to the right of the designated ticket.

The Ticket Resolution Page itself has four sections:

1. Ticket Info
2. PC Details (System Info)
3. Notes
4. Ticket Resolution Toolbox.

## Ticket Info

The Ticket Info section contains all of the user generated information about this ticket, including problem details, contact information, and a link to send a message directly to this user. From this section you have the options of viewing or controlling the customer's PC. When you click the "Connect" button to the left of the Host PC name, the Support Center Console applet will open a dialog box with the customer's host name pre-filled. To view and/or control this customer's PC, simply click the Connect button (leave the password prompt blank).

## PC Details

This section contains technical information automatically collected to assist you in troubleshooting the problem. Included in the details is information such as: the Operating System version and revision level, hardware info such as processor and memory; host applet installation date, default web browser; and networking info such as IP Address, Proxy Server and Proxy Authentication.

## Notes

The Notes section is a chronological log of all activities for a given ticket. Notes can be both automatically and manually generated.

## Ticket Resolution Toolbox

Your Toolbox functions in this section allow you to Add a New Note, Forward a Ticket to another **CSR**, and Edit The Ticket info.



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# Viewing the Customer's Screen

## Viewing the customer's screen

To view the customer's screen, click the "Connect" button while leaving the password prompt blank.

## Controlling the Customer's PC

To control the customer's PC, enter the host password that your customer provided you and click the "Connect" button. The customer's screen is displayed, and you can operate the remote PC as if you were sitting in front of it.

## Viewing Options

You have quite a few options for how you want the customer's screen to be displayed. These apply both when viewing and when controlling a customer PC. Once you have connected to your Customer's desktop, the eBLVD Client toolbar is displayed.



**Clipboard Transfer** - You can copy text or graphics FROM the Customer's PC, TO your PC (or vice-versa): To copy text or graphics FROM the Customer's PC, to your PC:

1. On the Customer's PC, right-click on the text and/or graphics to be copied to the CSR, and select Copy (placing the text and/or graphics in the clipboard).
2. Click the far left icon on the CSR Console Applet toolbar (Copy text/graphics from host).
3. You may now paste the copied text/graphics onto your PC.

To copy text or graphics FROM your PC to the Customer's PC:

1. On your PC, right-click on the text and/or graphics to be copied to the customer, and select Copy (placing the text and/or graphics in the clipboard).
2. Click the second icon from the left on the CSR Console Applet toolbar (Paste text/graphics to host).
3. You may now paste the copied text/graphics onto your customer's PC.

**File Transfer** - During a support session, you can transfer a file or files to or from your customer's computer. For example, you can deliver patches or updates to a customer's computer, or upload log files on the customer's computer for later analysis.

**Real-time Chat** - You can send and receive chat messages to and from a customer. Chat is useful if you want to communicate with a customer without using a telephone. For example, if a customer's call to your technical support center is a long-distance call, you can use chat to help the customer avoid long-distance charges. Either you or a customer can initiate a chat session.

To send chat messages:

1. On the CSR Console Applet toolbar, click the Chat icon.



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

2. The Chat panel appears. In the Send to drop-down list, select the name of the person to whom you want to send a chat message. If you want to send a message to all participants in the session, select All.
3. Type a message in the box.
4. Click Send. The recipient that you selected receives the chat message in his or her Chat panel.
5. Any messages that a customer or another support representative sends appear in your Chat panel.

**Screen Scaling** - You can 'scale' or 'size' the CSR Console Applet screen once you have connected to your customer's PC. You can also have multiple CSR Console Applet screens open at once to work on multiple issues simultaneously. To use Screen Scaling:

1. Click the Scale button on the CSR Console Applet toolbar
2. "Grab" any corner of the Applet screen and size to the desired height and width.
3. To resume back to normal size (the exact size based on the host's screen resolution), un-depress the Scale button.

**Screen Recording**- You can start recording a support session once you have connected to your customer's PC and have obtained permission from the customer. To start recording:

1. Click the Record Session button on the CSR Console Applet toolbar
2. Name the file and designate the location for the recorded file to be saved
3. Click the "Save" button
4. When you are done recording, simply click the "Stop Recording" button on the CSR Console Applet toolbar, or close the CSR Console Applet.

**Screen Capture** - You can start recording a support session once you have connected to your customer's PC and have obtained permission from the customer. To start recording:

1. Click the Screen Capture button on the CSR Console Applet toolbar
2. Name the file and designate the location for the screen capture graphic file to be saved
3. Click the "Save" button



# Ending a Support Session

**To end a support session semi-permanently:** You can end a support session at any time.

If you have resolved the issue and don't wish to allow other CSRs to connect to this customer later, you can select "Uninstall" from the customer's Host Applet Menu (by clicking the eBLVD icon in the customer's System Tray). This uninstall will automatically close the ticket.

Once a ticket is closed, your previously configured User Survey will be sent to your client via email. This option is enabled in your [Global Preferences](#).

**To end a support session and allow for other CSRs to connect to this customer later** by the "Using a previously-installed Host Applet" method: On the CSR Console Applet toolbar, click the "Disconnect" button. Or, simply exit out of the application.

Note: You still must close or transfer the ticket to remove it from your Open Ticket Queue.



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# Reporting

## Ticket History Report

This report allows you to analyze trends by **CSR** for a given time period. Simply select the CSR from the drop-down, select either All Tickets, **New Tickets**, **Open Tickets**, or **Closed Tickets**, and input your date range.

Once your report is generated, you then have the option to Export Your Data to an Excel spreadsheet or comma delimited file for import into your third-party software.

## Surveys

Surveys are used to acquire and track user feedback. Surveys may be sent from a support ticket at any time, or a default survey can be specified in your [global account preferences](#) to be automatically sent whenever a ticket is closed.

The data from each response from your surveys is automatically combined to provide you a graphical representation of each metric that you are interested in.

To collect data on additional metrics, simply add an additional question to an existing survey, or create a new one.



# FAQ and Troubleshooting

## **I've forgotten my password**

To retrieve or change the password for your online account, click [here](#) to obtain an email link to reset it. If you've forgotten the password for a Host PC, you will need to re-install the host software on that machine.

## **I need help with Session Recording**

Session Recording is currently available from the CSR Support Center Console. To enable Session Recording, the CSR connecting remotely will automatically have recording enabled upon connecting. To begin recording a session, click the "Record Session" button on the gray toolbar across the top of the eBLVD Client (the window displaying the Host PC's desktop). An .avi file will be created containing video only, but audio may be edited in later. View our [Session Recording Guide](#).

## **I need help setting up my Co-branding**

The landing page of the generated support link can display your logo, colors and contact info. To configure your cobrand settings, click the "Configure Cobranding Preferences" link on the "Configure Preferences" page of your account.

## **I'm having firewall problems**

Our service has been designed using end-to-end Secure Socket Layer (SSL) protocol to protect your data and enable your meeting traffic to traverse the internet unencumbered by firewalls. During an SSL session, data passed back and forth between the Host PC and participants is secured using public key cryptography. The Host PC exchanges key information with the participants to create a private conversation that only those involved in the meeting can understand. Occasionally, a highly restrictive firewall may need a modification to permit our service. View our [Security Guide](#) for more information.

Complete FAQ and Knowledge Base

Click [here](#) to access our complete FAQ and Knowledge Base...



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)

# About eBLVD

## Company Information

Founded in 2001 and located in Southern California, eBLVD is a pioneer of web based communication software and professional remote access tools.

## Contact Information

**Phone:**

+1 760-727-7277

+1 877-GET-eBLVD (877-438-3258)

**Fax:**

+1 760-454-0487

**Email:**

[support@eBLVD.com](mailto:support@eBLVD.com)

**Office Address:**

2244 Faraday Ave #120

Carlsbad CA 92008 USA

**Mailing Address:**

PO Box 130339

Carlsbad CA 92013 USA



877-GET-eBLVD • [www.eblvd.com](http://www.eblvd.com)