



Help Center Admin User Guide

Document v. 07-18-19.1

Introduction to the Help Center

[Vision-e Connect](#) is dedicated to provide clients with enhancing their Customer Relationships all through the utilization of sales and support enablement solutions for Xerox® ConnectKey® enabled Multifunction Printers (MFP).

Did you know, according to [Consumer Reports](#), 57% of people had been so frustrated with phone customer services that they hung up without a resolution and 50% of people had stopped purchase when they encountered poor customer service?

With the Help Center, your Xerox® ConnectKey® enabled MFP can now resolve any build up frustrations towards the customer's device by accessing Sales/Billing Inquiries to even Submitting a Support Ticket with just a few taps of their MFP's display screen.

Here are four reasons your MFPs should be equipped with our Help Center's Premium Edition:

1. **Customer Communication:** The Help Center app enables efficient communication critical in the early stages of a new business relationship to meet customer expectations and maintaining a long-term relationship.
2. **Promote YOUR Brand:** Good branding elevates a business and builds recognition and loyalty. Promote your brand in both the Standard and Premium Edition with company logos, sales representative professional portraits, and executive photos.
3. **Advertise All of Your Solutions:** The Premium Edition has an advertising engine to advertise all of your solutions and services. This can include upgrading the client's device, print management services, office supplies and any additional revenue drivers for your agency/firm.
4. **Professional Services:** We provide our Help Center customers with a large volume of Premium Edition professional services, such as hosting and maintaining your company brand, logo and personnel photos. We'll update and maintain your Help Center content as well as help design any marketing messages at your direction!

Learn more by visiting www.VisioneConnect.com or call us at (888) 611-2679.

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Installation

1.1 Install to your Multifunction Printer (MFP)

The Help Center app is available for all ConnectKey® enabled MFPs. Before you begin, please confirm your device meets this requirement.

If you do not know, we recommend you contact your agency and/or account representative.



As the app is hosted on Xerox's App Gallery, you will first need to create an account. To do so, please follow these steps:

Step 1

Visit the App Gallery by visiting <https://appgallery.services.xerox.com/#!/home/> and click Login on the top, right corner of your screen.

Step 2

Next, click on the Create Account option and follow the appropriate instructions.

A screenshot of the Xerox App Gallery 'Log In' screen. The screen has a light gray background and a white border. At the top left, the text 'Log In' is displayed. Below this, there are two input fields: 'Email' and 'Password'. Underneath the 'Password' field, there are two links: 'Forgot Password?' and 'Create Account'. At the bottom right, there are two buttons: a white 'Cancel' button and a dark gray 'Log In' button.

Step 3

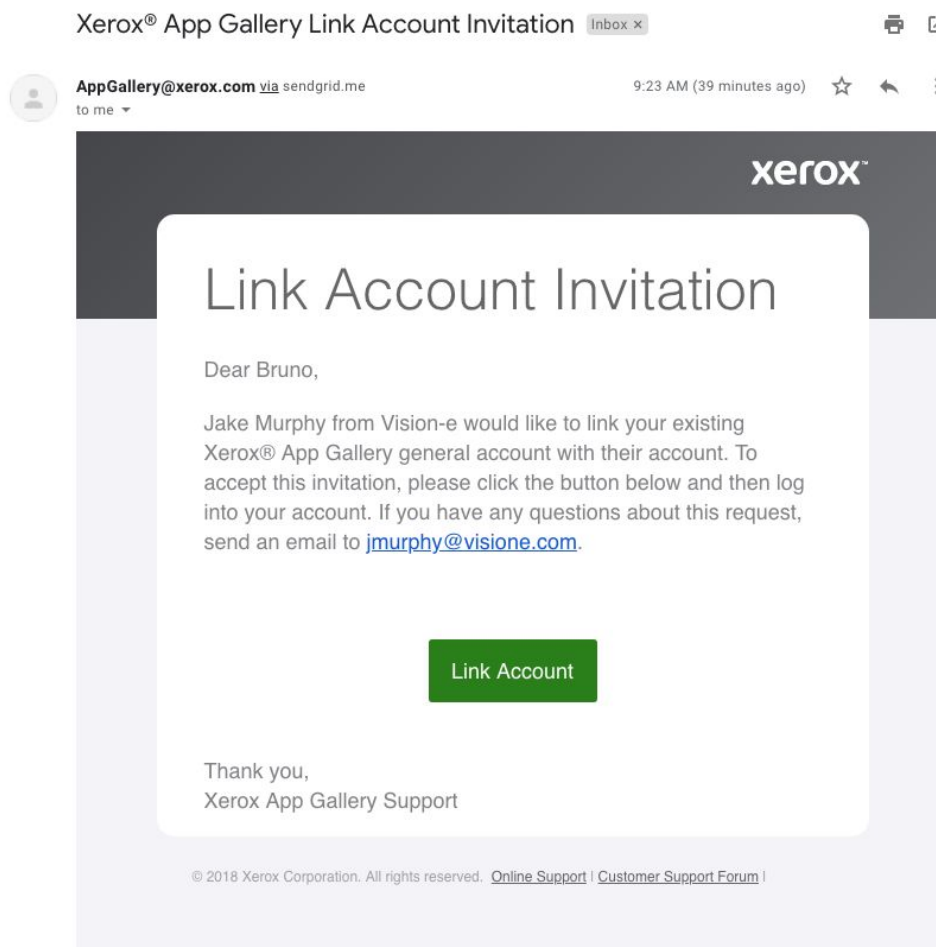
Once you've created your Account and are logged into the Xerox® App Gallery, you'll need access to Xerox's Channel Partner Gallery in order to search for the Help Center app.

Note: Search for *Vision* and you'll be able to view both the Billboard App and Help Center if you have access to Xerox's Channel Partner within the App Gallery.

If you do not have access to the Channel Partner Gallery, Vision-e will be able to invite you.

Step 4

To request access, contact your Vision-e Connect Representative. You will receive the *Link Account Invitation* email; make sure to click the Link Account button.



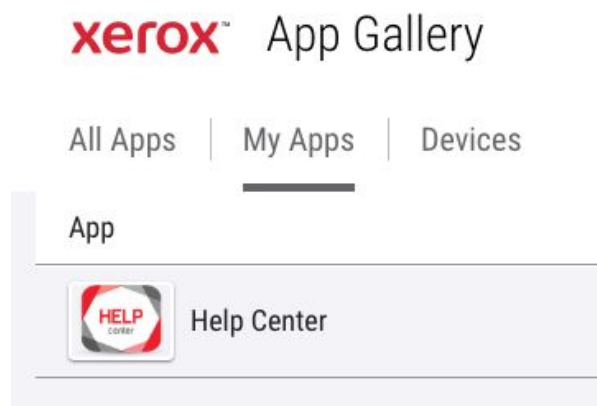
Step 5

Once you've clicked the button, you'll be directed back to the Xerox® App Gallery. For an immediate action, inform your Vision-e Connect Rep once this has occurred.

Step 6

Your Representative will then submit a secondary email sharing the Help Center with you.

When this has been completed, you will be able to view the Help Center located under My Apps within your Xerox® App Gallery account.

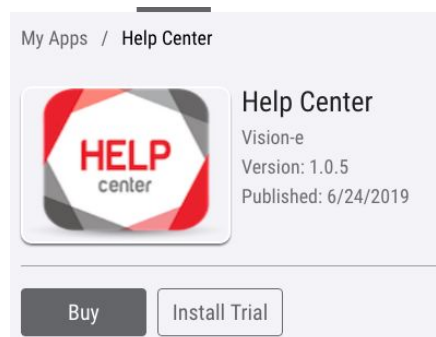


1.2 Beginning your Trial

Once the application has been made available to your App Gallery, you can move forward with beginning your Free 7-Day Trial or your immediate purchase.

Step 1

If you wish to begin your Trial, click Install Trial. Once your trial has expired, you will be notified on your Xerox® MFPs display for next steps to upgrade.



Step 2

Review the License Agreement terms when prompted. Once approved, click **Agree**.

Step 3

You may be prompted to add your Device. When ready, click **Add Device** and complete the required information including IP Address and your Admin Details.

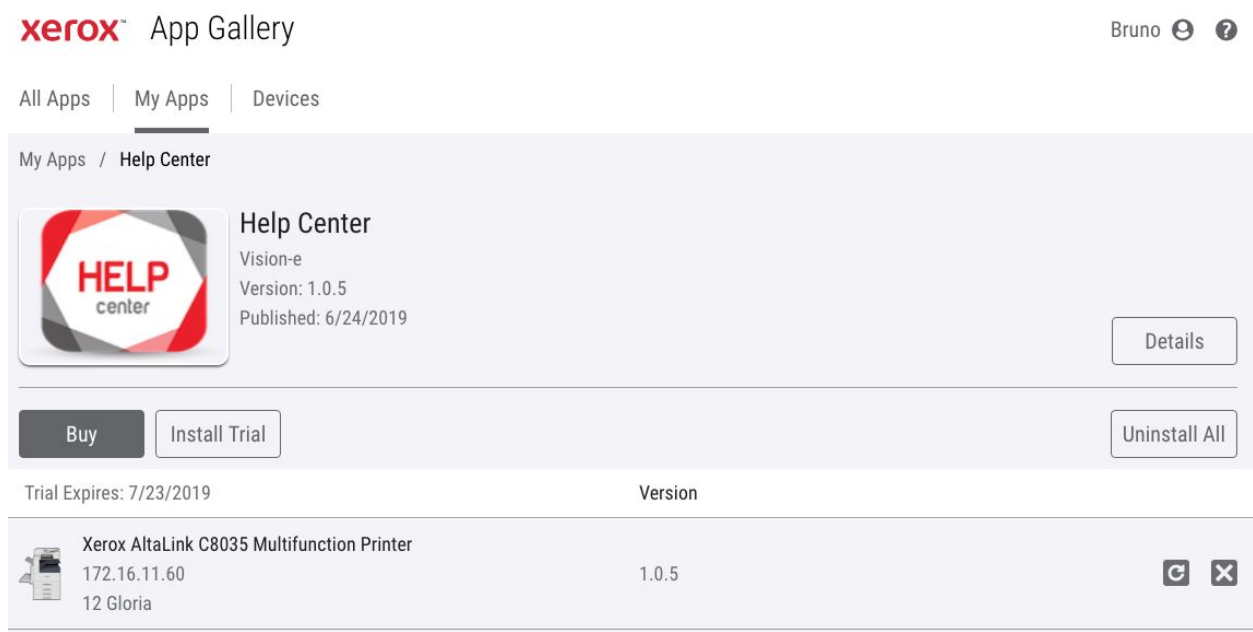
Step 4

When done, your Xerox® Multifunction Printer will be appear on the Install Trial window.

Step 5

Check the box next to your device and click **Install**.

Now that you've successfully initiated your Trial Install, your Help Center window under My Apps will provide you with the Expiration Date and App Version as shown below:



To confirm the install, walk to your Xerox® Multifunction Printer (MFP) and confirm the application is available on your device Home Screen.

Next, you'll need to create your Help Center Account.

Setup & Configuration

2.1 Creating your Help Center Account

Now that you've installed the Help Center onto your ConnectKey enabled Xerox® MFP, you'll need to create your very own Help Center Account.

Step 1

Visit www.VisionConnect.com and click on the Create a Help Center Account button.

Step 2

Next, as long as you've successfully followed the Help Center MFP Installation steps to initiate your Free Trial, skip to Step 2 on the Help Center Process page (Step 1 Above)

Note: If you're ready to purchase, follow Step 1 on the Help Center Process page.

Step 3

Complete the Help Center - New Account Request form with the appropriate information.

Help Center - New Account Request

<p>* Company</p> <input type="text"/>	<p>* Name</p> <input type="text"/>
<p>* Email Address</p> <input type="text"/>	<p>* Phone</p> <input type="text"/>

Did you attend the 2019 Xerox Global Summit in Atlanta?

Yes

No

0%

Step 3

When done, your completed form will be submitted to a Vision-e Connect Representative who will then create your Help Center Account internally.

Step 4

Once your account has been created, you will receive the Help Center Account Registration email from your Representative with vital links.

Step 5

Click the first link in order to create your password. Once you've typed your unique password, click Create.



Welcome to your Help Center

Choose a password to finish creating your account

Powered by 

Step 6

You will then be directed to our Help Center Control Panel. Type in your newly created credentials and click Login.



Control Panel

Email

Password

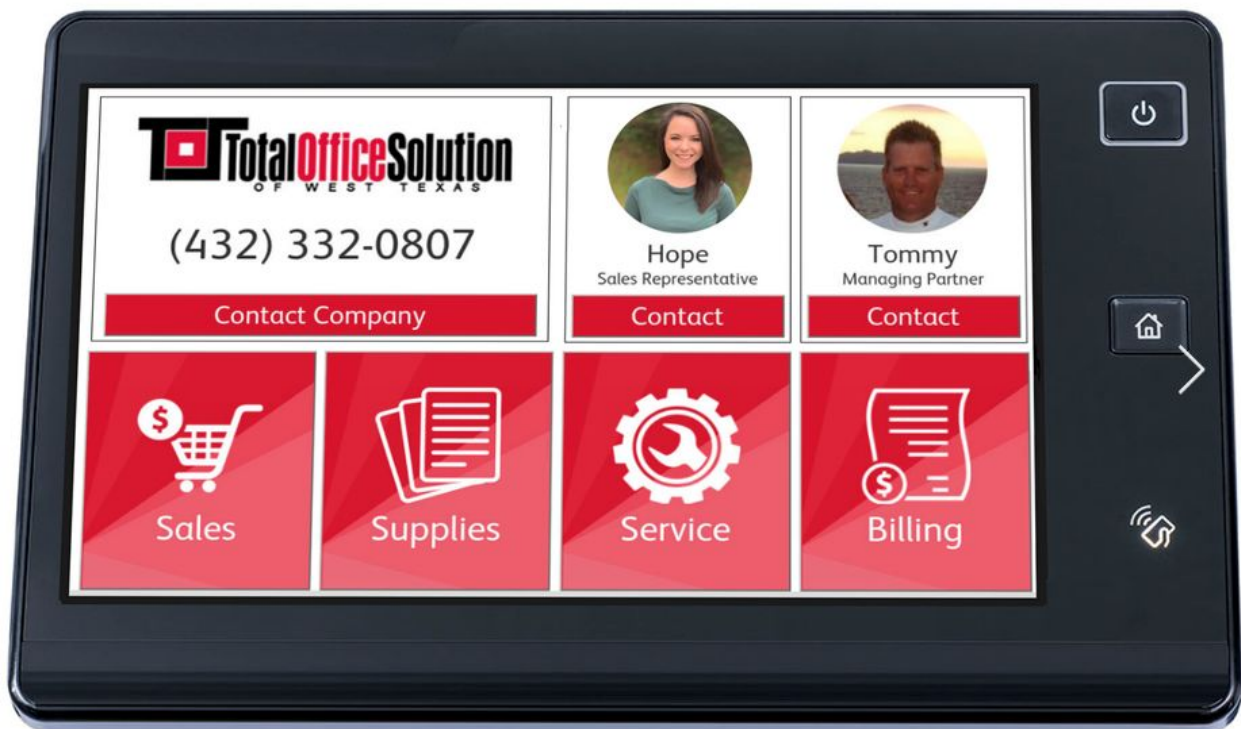
Powered by 

Now that you've logged into your Control Panel, you've officially created your new Help Center Account!

2.2 Manage Personnel

Now that you've created your Help Center Account and successfully logged in, you will need to manage your Personnel within the Help Center App.

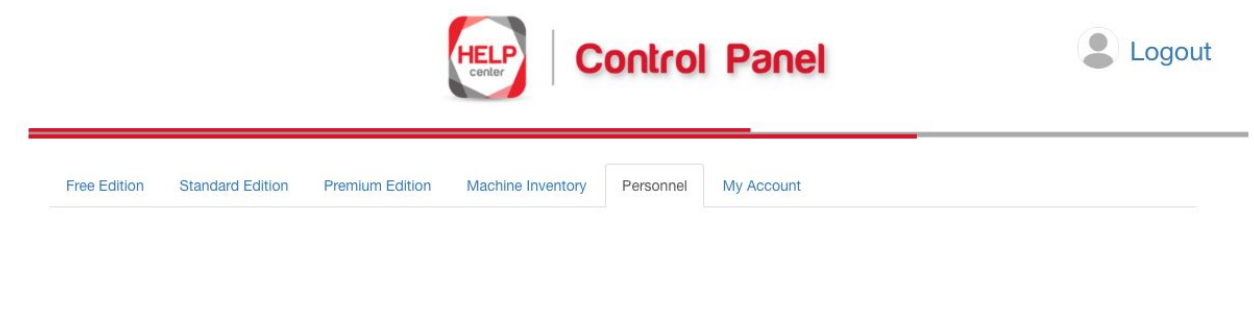
These individuals will be displayed within the app's Home screen.



*For Premium Edition licenses, Personnel can be contacted right from the Home screen as shown above.

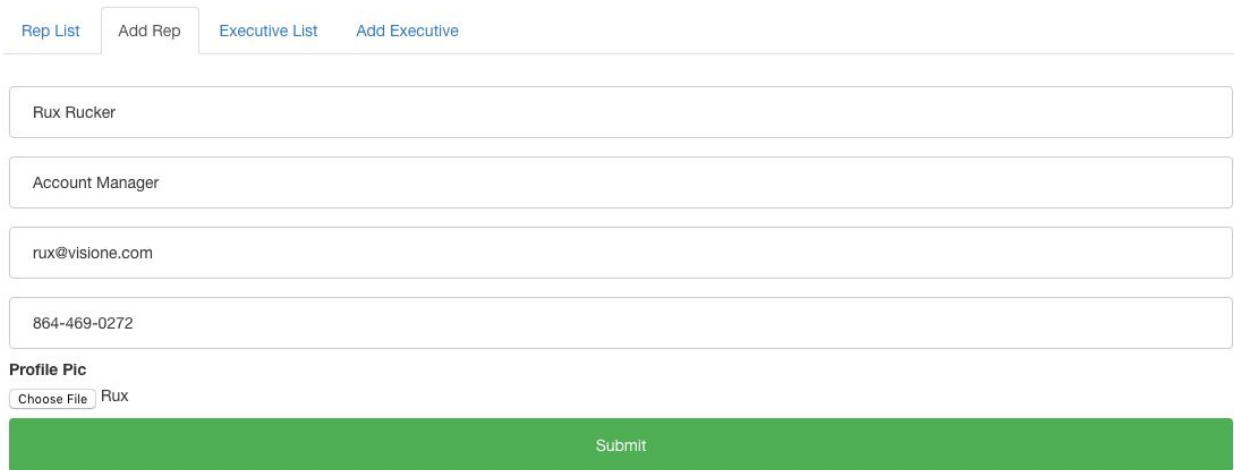
Step 1

To begin, click the Personnel tab within your Help Center Control Panel.



Step 2

Next, click the Add Rep tab and populate the required information as shown below:



Rep List Add Rep Executive List Add Executive

Rux Rucker

Account Manager

rux@visione.com

864-469-0272

Profile Pic

Choose File RUX

Submit

Step 3

When ready, click Submit.

Step 4

You will be prompted when the Sales Rep has been added. Click OK when done.

Step 5

Next, click the Add Executive tab. This functionality is utilized for the company's Sales Manager, Administrator, or whomever will act as a superior to the Sales Rep.

Step 6


When ready, complete the required fields as previously accomplished for the Sales Rep form and click Submit when done.

Step 7

You will be prompted when the Executive has been added. Click OK when done.

Step 8

To review a full list of your newly added Personnel, click the Rep List tab to view your Sales Reps and Executive List tab to view your Executives.

Rep List		Add Rep	Executive List	Add Executive
Name	Email	Phone Number		
 Rux Rucker	rux@visione.com	864-469-0272		
		Delete	Edit	

Step 9

If you wish to delete a created Personnel, click the **Delete** option. If the listing requires any changes, click the **Edit** option.

Once you've completed the provided steps, you will now need to complete your company profile.

Proceed to the next section to do so.

2.3 Manage My Account

Now that you've created your Help Center Account and have successfully logged in, you'll need to manage your company profile within the Help Center app.



Step 1

To begin, click the My Account tab within your Help Center Panel.

Company Profile
Licenses

Company Logo

Submit

Step 2

Next, complete the *Company Profile* form with the provided fields as shown above.

Step 3

When done, click Submit. Click OK when prompted.

TIP: The Licenses tab within your My Account page will provide you with a full view of your license breakdown.

Step 4

Once you've completed your Company Profile under My Accounts, you'll need to now build your Machine Inventory with all ConnectKey® enabled Xerox® MFPs.

2.4 Manage Machine Inventory

Now that you've created your Help Center Account, you'll need to manage your Machine Inventory for all Xerox® ConnectKey® enabled Multifunction Printers (MFP) with the Help Center installed.

This step will allow you to easily access any of your MFPs right from your Control Panel at any given time.

Step 1

Log into your Help Center Control Panel if you haven't already done so.

Step 2

Click the Machine Inventory tab within your Help Center Control Panel.

Step 3

Next, click the Add Machine tab and populate the following fields:

Machine List Add Machine Form Reasons

Vision-e

12 Gloria Lane Altalink C8035

3TX387100

Machine Type

Altalink

License Type

Standard (10 Available)

Industry

Technology

Sales Representative

Executive

bsilva@visione.com

bsilva@visione.com

bsilva@visione.com

Submit

- Company Name
- Machine Name - Make it unique; be creative!
- Serial Number - This can be obtained from your device's General Information
- Machine Type - Make sure this matches your Serial Number
- License Type - Free, Standard or Premium

- Industry
- Sales Representative
- Supplier Email - This will be the recipient for any Supplies inquiries from the app
- Service Email - This will be the recipient for any Service Tickets from the app
- Billing Email - This will be the recipient for any Billing Inquiries from the app

Step 4

Click Submit when done. Click OK to confirm.

Step 5

To view your fleet of Xerox® ConnectKey® enabled MFPs under the Help Center, click the Machine List tab.

Note: You'll now be able to view a full list of Active, Inactive, or All machines as well as filtering per Sales Rep simplifying the process even further!

2.5 Customize your Help Center Channels

Now that you've built your Control Panel with the vital Personnel, Company Profile and Machine Inventory, the next step will be to customize your Help Center Channels.

These channels will reflect within the Help Center displayed within your Xerox ConnectKey® enabled Multifunction Printer (MFP) for users to access with a tap of their finger on the Home screen.

Step 1

To begin, click the Tab affiliated to your Help Center Edition (i.e. - Free Edition, Standard Edition or Premium Edition)



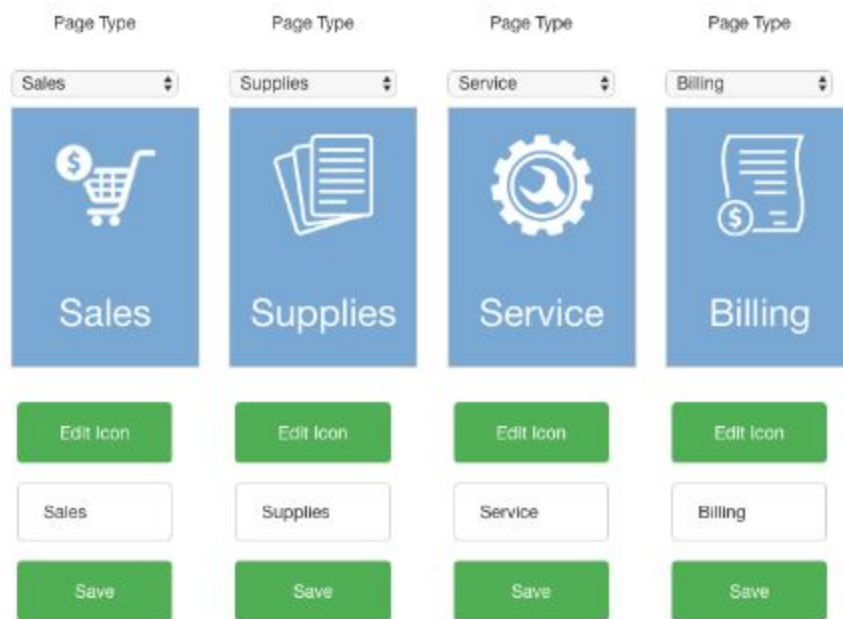
Note: In the event you have multiple Editions of our Help Center, the changes made within your selected Edition page will only reflect to its respective machine. (i.e. - Edits done under the Premium Edition page will be subject to the MFPs enabled with that particular edition)

Customizing Standard Edition Channels

Step 1

Once you've selected the Standard Edition tab, you'll be able to access which Channels appear within your Help Center app as shown below:

Channels for Standard Licenses



Step 2

The Standard Edition Channels, as noted in the above screenshot, include:

- Sales - Any or all Sales Inquiries
- Supplies - Used when a user needs to order additional device supplies
- Service - Place a service ticket right from your MFP
- Billing - Any or all Billing Inquiries
- Custom Form - This channel is strictly up to you! (i.e. - Human Resources)

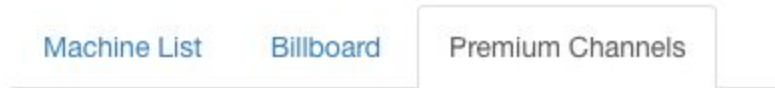
Step 3

To edit the image selected, click the Edit Icon button. If you wish to rename the Channel, update the *Title* text field and click Save.

Customizing Premium Edition Channels

Step 1

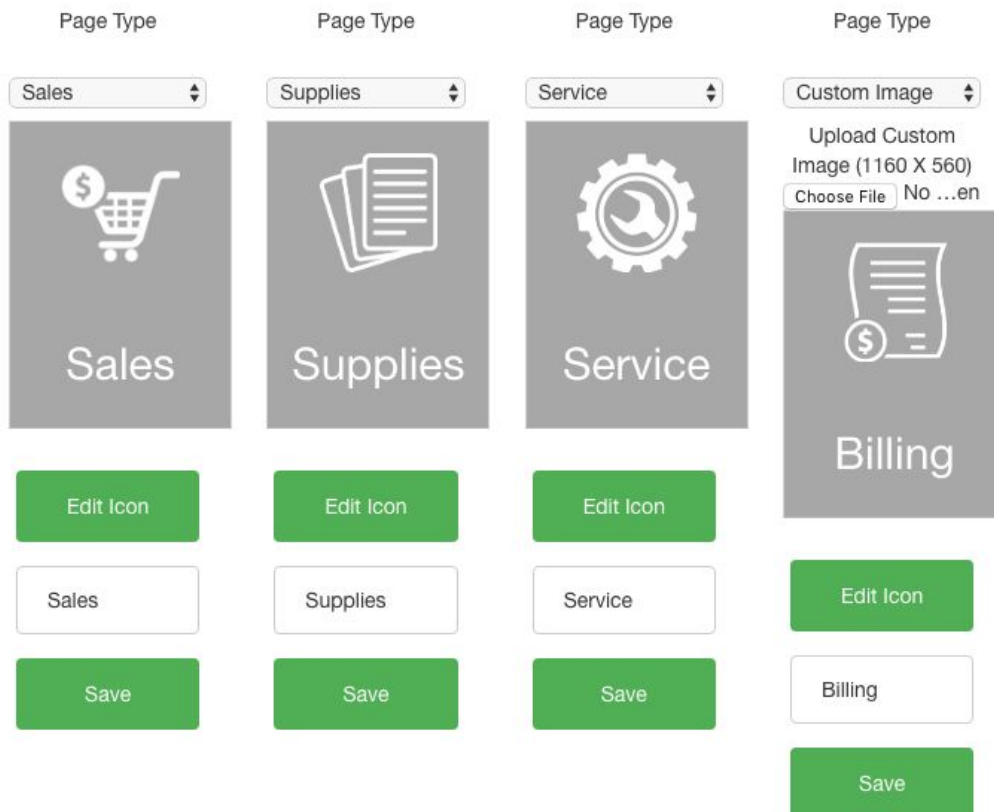
If you're working under the Premium Edition, to access the provided Channels click the Premium Channels tab.



Step 2

Your Channel options will reflect as follows:

Channels for Premium Licenses



Step 3

Each Premium Edition Channel will allow you to complete the following:

- Sales - Any or all Sales Inquiries
- Supplies - Used when a user needs to order additional device supplies
- Service - Place a service ticket right from your MFP
- Billing - Any or all Billing Inquiries
- Custom Form - This channel is strictly up to you! (i.e. - Human Resources)
- Custom Image - This channel is utilized to include a custom channel image of your choice. Click Choose File to upload your image under the required dimensions. Type the custom Channel Name and click the Save button.

Step 4

With the Premium Edition, you will be able to select a custom color for your Channel.

Choose a Color (Chrome or Edge
Browser required):

To do so, you'll need to enter the colors *Hex Color Code* or select the desired color from the provide grid.

Step 5

When done, click Update Colors and OK if prompted.

2.6 Additional Premium Edition Channel Features

Along with additional customization factors with your Premium Edition Channels, Admins will be able to apply these edits to specific machines and even promote vital adverts through the Help Center App.

Machine List

The Machine List tab under your Premium Edition portal tab will only provide you with the MFPs enabled under your Help Center Premium Edition licenses. To further assist,

you'll be able to pin down the exact device you're searching for by utilizing the Filter criteria.

Machine List
Billboard
Premium Channels

Name ▾

Filter Criteria

Filter

Change the billboard template for all the checked machines to this billboard template:

Out of Order ▾

Update

Active ▾

Billboard

Did you know the average employee prints close to 10,000 pages a year?

Utilizing your MFPs display can allow you to broadcast vital messages to your employees at any given moment.

For further information on your Help Center Billboard Templates, skip down to Page 21

Did You Know: Messages and Templates can be created by Vision-e Connect's Marketing Department at an additional cost through our Professional Services.

2.7 Manage Form Reasons

Now that you've enabled your Help Center Channels to be on display for your user(s), Form Reasons will allow them to provide an additional insight on why they've navigated to that particular Channel in the first place.

Step 1

To begin, log into your Help Center Control Panel.

Step 2

As highlighted in the above screenshot, click the Machine Inventory tab. Then click the Form Reason tab.

Step 3

To select which Channel you wish to customize, click the sub tab of your choice (i.e. - Sales, Service, Supplies, Billing)



Step 4

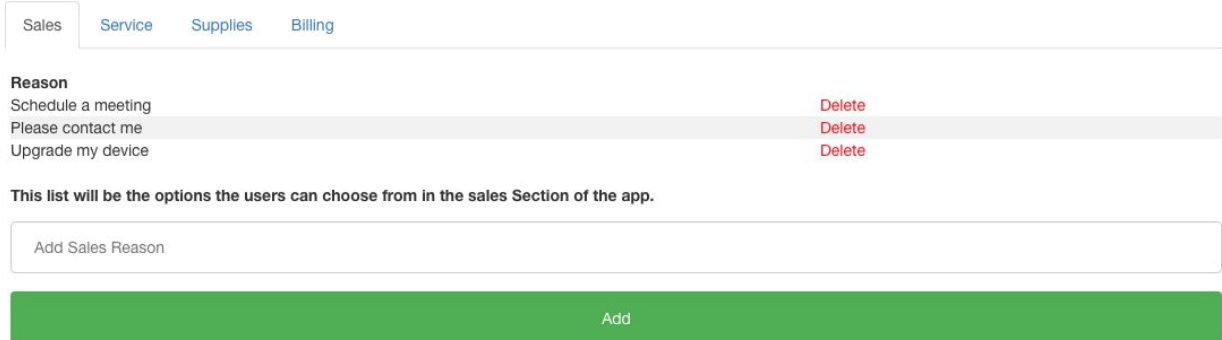
You'll be able to access all of the default Form Reasons already to their respective channel.

Step 5

To delete the Form Reason, click the **Delete** link.

Step 6

To add a new Form Reason, type the value within the provided text box.



Step 7

When done, click Add.

Your Help Center will automatically display the updated Channel Form Reasons once you've reset your apps on the Xerox® MFP.

2.8 Help Center Billboard Templates

Now that you've enabled your Help Center app with the Premium Edition, users will be able to review and access your advert messages right from your Xerox® ConnectKey® enabled MFP.

Default Billboard Template(s)

To access Default Billboard Templates that have been provided to you on behalf of Vision-e Connect, follow the instructions below:

Step 1

Navigate to www.visioneconnect.com and click the Login tab.

Step 2

Type in your Help Center Account credentials.

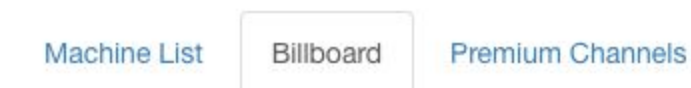
Step 3

Once you've logged in, click the Premium Edition tab.



Step 4

Click the Billboard tab next.



Step 5

You'll be provided two Default Billboards to choose from.

- Managed Print Services
- Out of Order

Step 6

Navigate to Section - Enable your Machine(s) for Billboard Template below for next steps.

Custom Billboard Template(s)

As a Premium Edition client of our Help Center, you will have the ability to create and upload custom Billboard Templates which can range from Happy Birthday wishes to important Human Resource notifications.

To begin, follow the instructions below:

Step 1

Navigate to www.visionconnect.com and click the Login tab.

Step 2

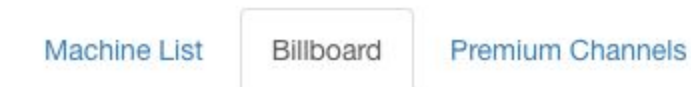
Type in your Help Center Account credentials.

Step 3

Once you've logged in, click the Premium Edition tab.

Step 4

Click the Billboard tab next.



You'll first need to create your Billboard Template internally to reflect your message to your users.

To assist, here are the following size/file requirements we recommend:

- 500 x 750 Dimensions
- 100KB Maximum File Size

Note: Vision-e Connect offers Professional Services that include creation of your custom Billboards by our Marketing Department. For more information, [CLICK HERE](#).

Now that you've created your Custom Billboard Template, please continue with the below instructions:

Step 5

Provide your Billboard with a unique name within the provided text field.

Step 6

Next, upload the Billboard Template file you created or provided to you by clicking Choose File and searching within your device.

Step 7

Select whether you wish to Enable or Disable the Toggle “Enter Help Center” Button.

- This feature will overlay a Enter Help Center button to display over your Custom Billboard allowing the user(s) to navigate out of your advert and back into the Help Center app.



Step 8

When ready, click Create Billboard.

Custom Billboard Templates

Toggle "Enter Help Center" Button



Billboard Name

Upload Image (use an image with a width/height ratio of 1.5 with a max size of 100kb):

No file chosen

Create Billboard

Step 8

Lastly, click OK when prompted.

Your Custom Billboard(s) will now appear below the *Custom Billboard Templates* header.

Delete Custom Billboard Template(s)

In the event you wish to delete the Billboard(s), whether they've now expired or have served its purpose, follow the steps below:

Step 1

Once you've logged into your Help Center Control Panel, click the Premium Edition tab.

Step 2

Click the Billboard tab next.

Step 3

Click the Delete button below the Custom Billboard Template you wish to delete as shown below.

Happy Birthday



Delete

Enable your Machine(s) for Billboard Templates

Prior to applying any Billboard Template to a Help Center enabled MFP, you'll need to Enable that device to accept Billboards.

Follow the instructions below in order to do so:

Step 1

Once you've logged into your Help Center Control Panel, click the Premium Edition tab.

Step 2

Next, click the Machine List tab.

Step 3

Click the Edit link for the active machine of your choice.

Step 4

Toggle the Enable Billboard switch to ON.



Step 5

Scroll down and click the Submit button.

Step 6

Next, follow the steps below to learn how to Apply your Billboard Templates.

Applying your Billboard Template(s)

To enable your Billboard for the Xerox Connectkey enabled MFP with our Help Center Premium Edition, follow the steps below:

Step 1

Once you've logged into your Help Center Control Panel, click the Premium Edition tab.

Step 2

Next, click the Machine List tab.

Step 3

Select the desired Billboard Template from the below drop down menu.

Change the billboard template for all the checked machines to this billboard template:

Out of Order

- Out of Order
- Print Service
- rocket
- Successful Vs Unsuccessful
- 500x750
- 500x1000

Active

Update

Step 4

Once you've selected the template, scroll down and check the box next to the machine of your choice.

<input type="checkbox"/>	Name	Customer Name	Serial Number	Sales Rep	Industry	Type	Billboard	License		
<input checked="" type="checkbox"/>	8045	Vision-e	y4x855706	Rux Rucker2	Electronics	Aitalink	Out of Order	Premium	De-activate	Edit
<input type="checkbox"/>	Upstairs	Greer	4HX535841	Rux Rucker	Agriculture	Aitalink	Print Service	Premium	De-activate	Edit

Step 5

When ready, click the green Update button next to your selected Billboard Template.



Now that you've enabled your Billboard to the MFP, your message will now be displayed within the machine's user interface if the Help Center is your device's default application.

If it is not, then your Billboard Template will display to the user(s) when they navigate into the Help Center.

Getting Started

3.0 Upgrading your Help Center Trial

As the Help Center Admin, it is important to note that there will be two notifications of your 7-day trial expiring and they are as follows:

- **Email** - You will receive an email a 48 to 72 hours after initiating your Help Center Trial. We recommend saving this email.
- **Device** - A notice will appear on the user interface of your MFP when launching your Help Center.

To update, once you receive the email below, we recommend keeping the email or saving it within your Inbox when you're ready to purchase.

Trial Expiring Soon

Dear Bruno,

Your Help Center is trial is expiring soon.

Visit Xerox® App Gallery and purchase this app to continue service.

[Purchase](#)

App: Help Center

Expiration Date: **2019-07-23**

Thank you,
Xerox App Gallery Support

Here are the appropriate steps to follow:

Step 1

Click the Purchase button within the received email.

Step 2

Type in your Xerox® App Gallery credentials.


Step 3

When prompted, review the License Agreement and click Agree when ready.

Step 4


You'll now need to select your compatible device(s) linked to your Xerox® App Gallery account for the Help Center.

Buy

 **Help Center**
Version 1.0.5

Select compatible devices.

Select All

 **Xerox AltaLink C8035 Multifunction Printer**
172.16.11.60
12 Gloria

Purchase for Additional Devices:

Price Per Device: \$20.00
Number of Devices: 1

Subtotal: \$20.00

Taxes will be applied at checkout.

Step 5

Once you've selected your compatible device(s) and selected the correct number of MFPs to be enabled with the Help Center app, click Checkout.

Step 6

You'll now be asked to enter your Billing Information.

Step 7

When done, click Place Order.

Step 8

Once your order has been processed, you'll be prompted with a confirmation page. Click Done.

You'll be navigated back to your Xerox® App Gallery where the Help Center will be downloading and installing.

This step will only take a few seconds.

Your Help Center Trial has now been activated to the Standard Edition.

Note: If you wish to move forward with the application's Premium Edition, please email support@visione.com

Frequently Asked Questions (FAQs)

I don't see the Help Center app in the Xerox® App Gallery?

The Help Center app is not available in the "Public" App Gallery. Contact Xerox to request "Channel Partner" App Gallery access. This is the recommended process for access to the Help Center and other partner solutions.

You can also contact us to share our account, and then we can share the Help Center app.

Can I get NFR Standard Licenses?

The Standard Edition available in the Partner Channel App Gallery is listed at \$20. Xerox Channel Partners get a 20% discount. We do not control App Gallery pricing once published or any offerings thereafter so cannot offer free Standard licenses.

We also can not distribute the solution outside the App Gallery. However, when you purchase the Standard Edition, we will upgrade 10 licenses from to Standard Edition to the Premium Edition at no cost.

Do you offer free licenses to Xerox Partners?

To learn more, call us at 1 (888) 611-2679 or email us at Support@Visione.com.

Can I have some devices on the Standard Edition and some on Premium Edition?

Yes!

What languages are supported?

OCR Recognition languages: Chinese Simplified, Chinese Traditional, Czech, Danish, Dutch (Netherlands), English, Estonian, Finnish, French, German, Greek, Hungarian, Indonesian, Italian, Japanese, Korean, Norwegian Nynorsk + Norwegian Bokmal, Norwegian (Bokmal), Norwegian (Nynorsk), Polish, Portuguese (Brazil), Portuguese (Portugal), Russian, Spanish, Swedish, Turkish, Ukrainian.

What are the image size requirements?

The maximum limit image sizes:

Company Logo: 30kb

Personnel Pictures: 30kb

Channel Custom Images: 100kb
Billboard: 100kb

Recommended images sizes:

Company logo: 100 Height x 400 Width
Personnel Pictures: 250 Height x 250 Width
Channel Custom Images: 500 Height x 1000 Width
Billboard: 500 Height x 750 Width

TIP* Save File Type as JPEG with 90% Quality

What's the advantage of Help Center over other Contact Apps?

The Help Center is not a contact app, it's a customizable customer communication and marketing platform with the primary purpose of improving customer relationships with an advertising engine to generate more revenue from your existing customer base. Our Premium Edition includes professional services to manage your Help Center content, design advertisement, and manage advertising campaigns.

Can I remove or change the Billing, Sales, Service or Supplies channels?

Yes, you can customize the 4 communication channels to include other communication options. The Premium edition can be used for display advertisements to promote any of your solutions.

We offer free advertisement design services for customers with at least 100 Premium Edition ConnectKey® enabled devices.

Why doesn't the Supply Toner level display on some devices?

Currently the Help Center only displays Supply Toner Levels on Xerox® C-Model AltaLink® devices.

What's the difference between Billboard and Partner Billboard?

Billboard is available on the Xerox App Gallery for \$100 per license. The Billboard App enables your customer within their network to configure and manage internal messages.

The Partner Billboard is included with the Help Center Premium Edition. The Partner Billboard solution enables the Xerox® partners to publish messages and advertise to their customer from an online portal or through our professional services.

Can I reassign a Help Center license to another device?

No. The one time price for Help Center is based on one license to one device. The license is valid up to five years for the one device.

Can I have a separate Help Center account for a customer?

A dedicated Help Center account can be created for large volume customers so they manage their ConnectKey® enabled devices, including Billboard messaging. A setup, implementation, and training fee may be required. Contact us for more details.

Do you share any of my data with Xerox®?

No. We are proud to be involved in the Xerox® ConnectKey® Developer Program, however, there is no data exchange with Xerox®. Help Center content is hosted on our secure Amazon Web Servers and kept confidential.

For more Frequently Asked Questions visit VisioneConnect.com/FAQs or visit the Knowledge Base at VisioneConnect.com/knowledge-base.

Help & Support

Support

If you wish to receive additional support, we're here to help! Contact us at:

Email: Support@Visione.com

Toll Free: (888) 611-2679

Website: www.VisioneConnect.com

Notes

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