

Agent How to Guides

How to guide for agents troubleshooting general PC issues, headsets, Genesys, etc.

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Accessing Insite Email

With the implementation of SSO for Salesforce within the DFC program, you may encounter the following when logging into your email:

image.png

To log in, follow these steps:

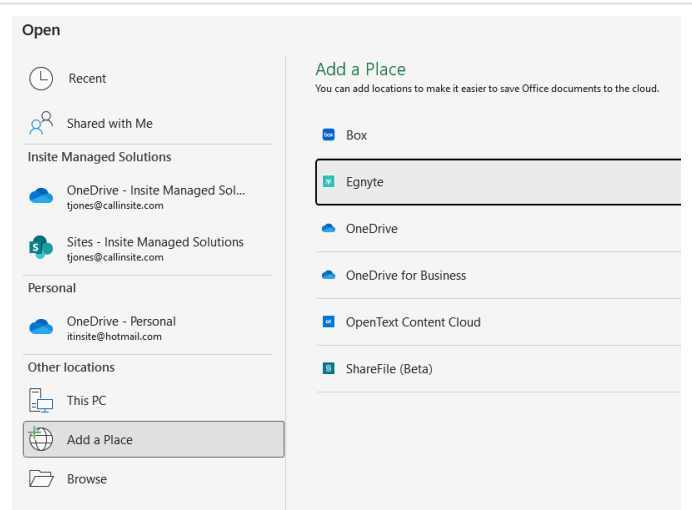
1. Go to office365.com in Chrome and sign in
2. Click your initials or your photo in bottom-left corner of the screen, make sure you see your Callinsite email first.
 1. If you're signed in with your Delta/MASCO account, you should see your Insite account in the list at the bottom of that window. Click that. If not, click "Sign in with another account" and sign in with your Insite account.
3. Click Apps on the left pane, then Outlook at the top of the screen.

Add Egnyte as "A Place" in Office

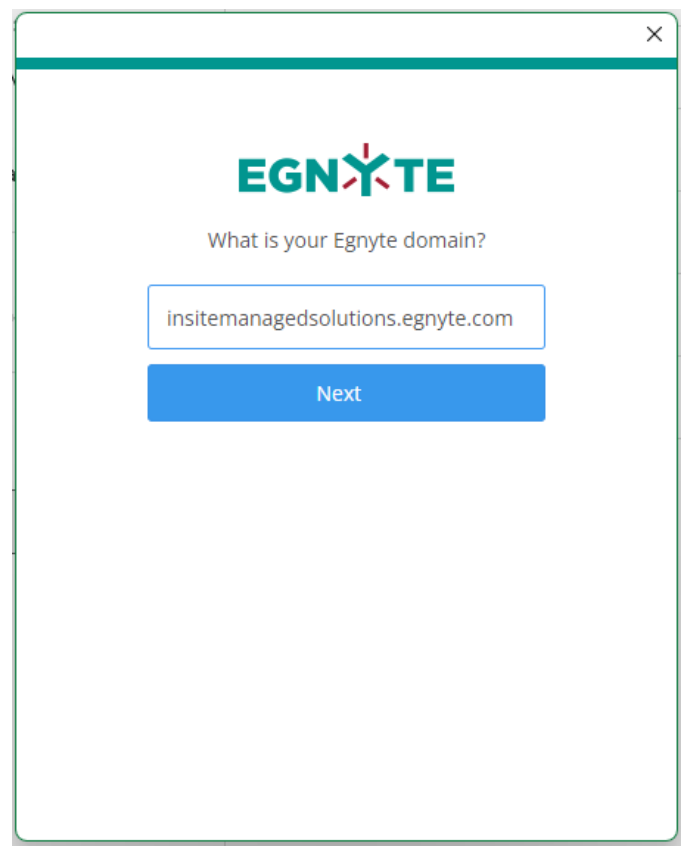
To enable Co-Editing with the new Egnyte updates, follow these steps:

Step 1: Open any Office program (Word, Excel, PowerPoint) and click File > Open.

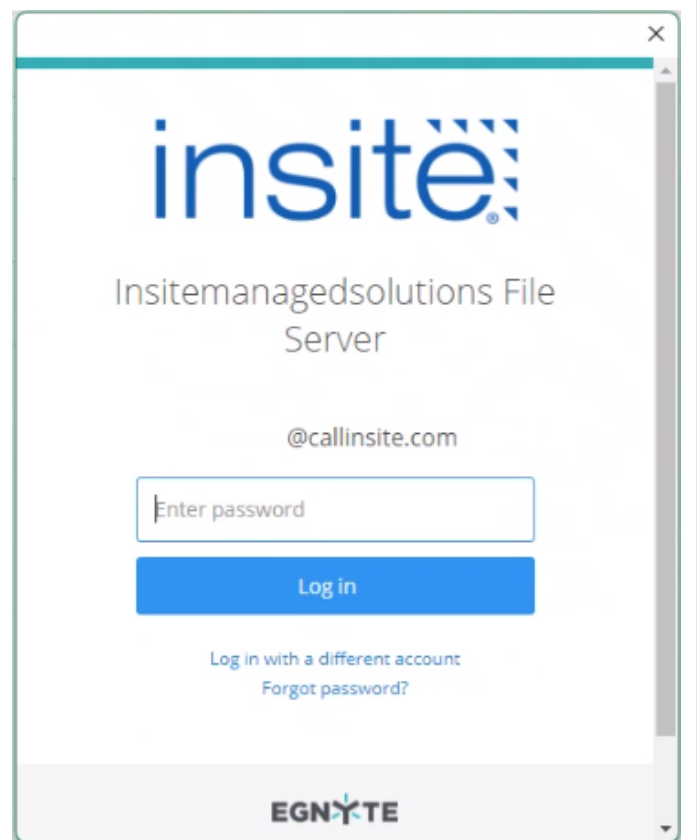
Select "Add a Place", then chose Egnyte



Step 2: Enter "insitemanagedsolutions.egnyte.com" (without the quotes) in the domain space and sign in.

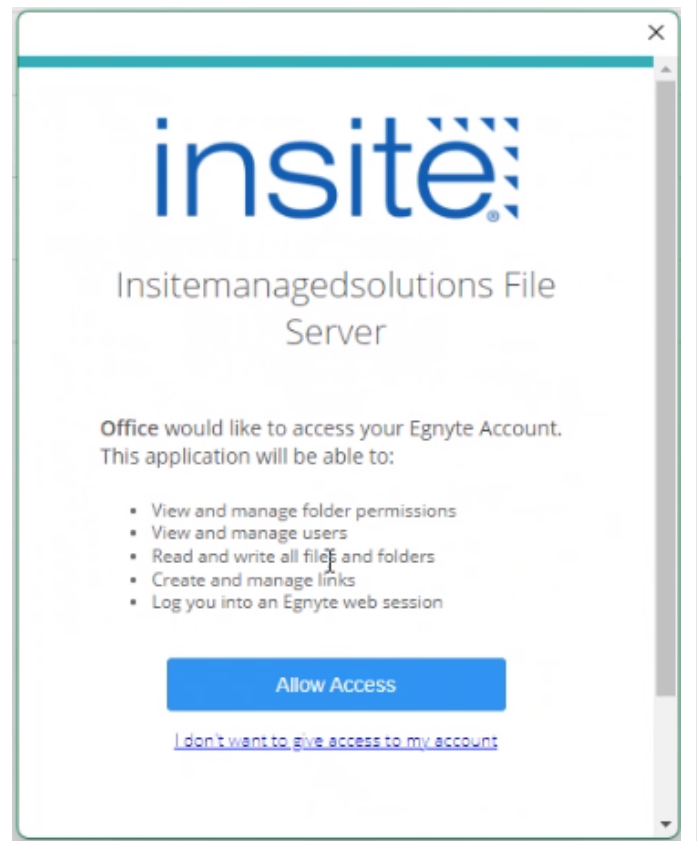


Step 3: Enter your CallInsite email address and password on the following screens



The screenshot shows the login interface for 'insite:'. The page title is 'Insitemanagedsolutions File Server'. Below the title, the email address '@callinsite.com' is displayed. There is a text input field labeled 'Enter password' and a blue 'Log in' button. At the bottom of the page, the 'EGNYTE' logo is visible.

Step 4: Click "Allow Access" on the confirmation page



The screenshot shows the account access confirmation page for 'insite:'. The page title is 'Insitemanagedsolutions File Server'. Below the title, the text reads: 'Office would like to access your Egnyte Account. This application will be able to:'. A list of permissions is provided:

- View and manage folder permissions
- View and manage users
- Read and write all files and folders
- Create and manage links
- Log you into an Egnyte web session

At the bottom, there is a blue 'Allow Access' button and a link that says '[I don't want to give access to my account](#)'.

Beeping Headset

OVERVIEW

This article will describe how to solve for your headset beeping consistently. Some reports have indicated that the microphone will also be muted during this period.

PROCEDURE

The issue stems from an issue with Teams setting the headset to "hold" and not releasing it. To resolve, simply quit and re-open teams. To quit teams, find the icon in the lower-right corner of the screen. Right click it, and chose quit.

image.png

Once closed, you should notice the beeping has stopped. You may now re-open teams.

Connect Bluetooth Headset

<u>Step</u>	<u>Description</u>	<u>Screen Shot</u>
1. Open Bluetooth Settings	<ol style="list-style-type: none">1. Open the start menu and search for "Bluetooth"2. Click "Bluetooth and other device settings"	image.png
2. Add Bluetooth Device	<ol style="list-style-type: none">1. On the screen that opens, click "+ Add Bluetooth or other device".	image.png
3. Place headset in pairing mode	Put your headset in pair mode, slide and hold the Power switch away from the off position until you hear "pairing" and the headset LEDs flash red and blue.	image.png
4. Search for Bluetooth devices	<ol style="list-style-type: none">1. On the screen that comes up, click "Bluetooth"2. When you see your headset in the list, click it to pair.	image.png
5. Complete pairing	Wait until the connection completes. Note: If prompted to use Swift Pair, click No Thanks.	image.png
6. Set up Genesys	Open the Genesys Application on the bottom of your screen. Once your signed in click on the voice button on the side pane and then click settings gear icon	image.png
	Click Performance, then under Media Controls click the arrow next to "Use Computer Settings"	image.png
	Select new profile	image.png
	Select the Poly headset for all three input/output options	image.png

Headset muting/unmuting by itself

If your headset continuously says "muted, un-muted" repeatedly, you'll need to reset the proximity sensors in the headset. Follow these steps:

There are two ways to reset the headset sensors.

1. With your headset powered on, charge your headset on the charge stand for 10 seconds
2. Press and hold both the Mute and Play/pause buttons for more than 4 seconds until the LEDs flash purple twice, being careful to not touch the earcup padding or allow it to come in contact with surfaces

Alternatively, you may opt to disable the sensors. You can disable these by holding both the Mute and Call buttons for more than 4 seconds until the LED flashes purple then red. Repeat to reactivate; the LED flashes purple then blue.

image.png

Install Grammarly

Once set up, you will receive an email from Grammarly to set up your account with them. Please follow those instructions. If you do not have an email, please submit a request for a license to IT Admin.

You will need to install 3 plugins in total:

Windows App: <https://download-windows.grammarly.com/GrammarlyInstaller.exe>

Chrome Plugin: <https://chrome.google.com/webstore/detail/kbfnbcaepibcioakkpcpgfkobkghlen>

Office Plugin: <https://download-office.grammarly.com/latest/GrammarlyAddInSetup.exe>

Please download and install these plugins to complete your setup.

Reporting PCI Policy Violations

If you believe you have observed a PCI Policy violation, it is important that you report it immediately for further investigation and remediation. You may report a violation by filling out the following form. Note, you must be logged into your Insite email account to access this form.

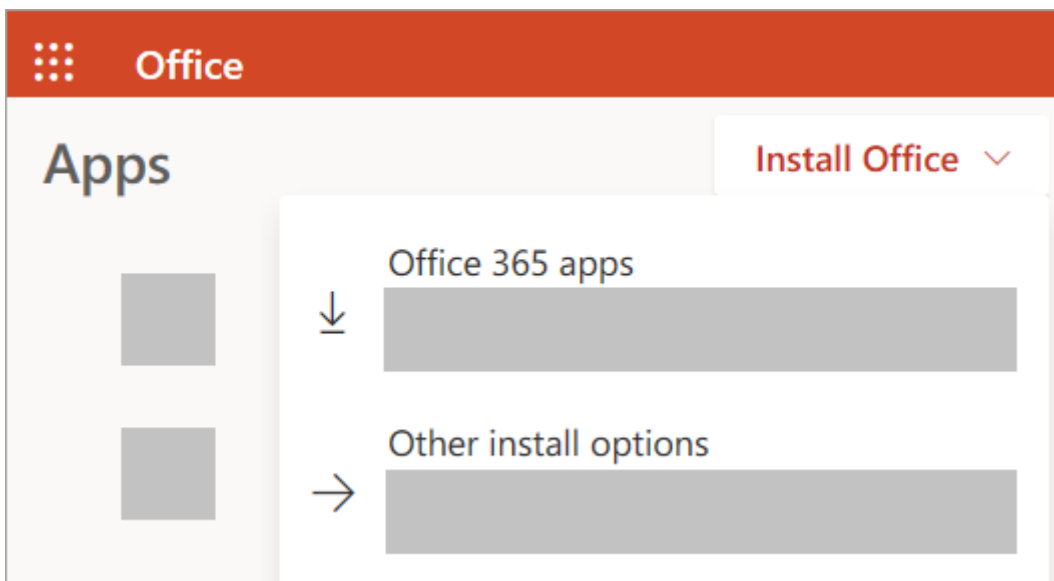
<https://forms.office.com/r/GEgKXw4Asn>

image.png

How to Install Visio

After you have had a Visio license assigned, you must download and install the software onto your computer. To do so, follow these steps:

1. Go to www.office.com and if you're not already signed in, select Sign in.
2. Sign in with your CallInsite.com login.
3. From the Office home page select Install Office > Other install options. (If you set a different start page, go to admin.microsoft.com/account#installs.)



4. From My Account, select Apps & devices.
5. Find Visio from the list and choose your language and the 64-bit or 32-bit version, then select Install Visio. (If you have any other Office apps installed, make sure to select the same bit version for your Visio installation. What version of Office am I using?)

Install Visio

1. Depending on your browser, select Run (in Edge or Internet Explorer), Setup (in Chrome), or Save File (in Firefox).

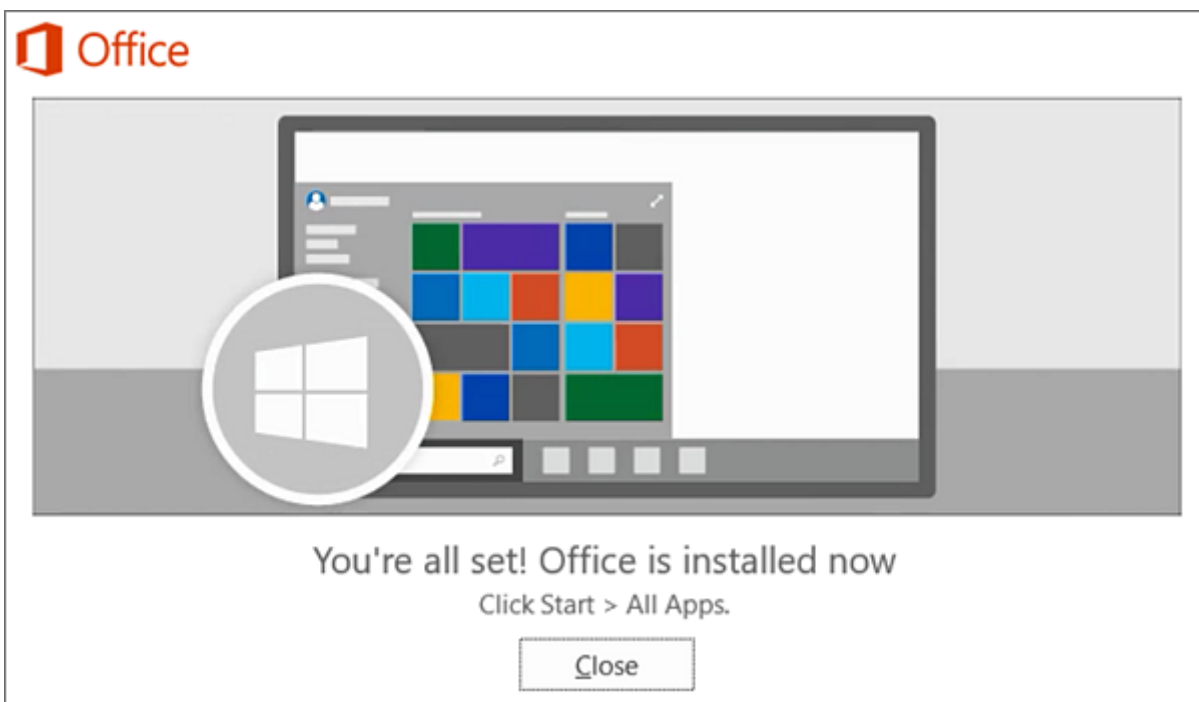
If you see the User Account Control prompt that says, Do you want to allow this app to make changes to your device? select Yes.

The install begins.



1. Your install is finished when you see the phrase, "You're all set! Visio is installed now" and an animation plays to show you where to find the Visio app on your computer.

Follow the instructions in the window to find Visio. For example, depending on your version of Windows, select Start and then scroll to find Visio from your list of apps.



Introducing Flash's new IT Support Portal



New ITIS Platform

insite

Segregated Portals for Core Services and EC.

This enables us to tailor our support options to the specific needs of each project we support.

IT Support Services

Select your company / department:





Direct access is still available by navigating to FlashIT.CallInsite.com (Core Services) or ECIT.CallInsite.com (Engagement Center)



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2

More concise ticket choices

Our data shows that more than 90% of tickets were either trouble tickets or Egnyte requests. So we got rid of the noise!

Create a new ticket

What kind of issue are you having?

Technical Issue Egnyte Access Request

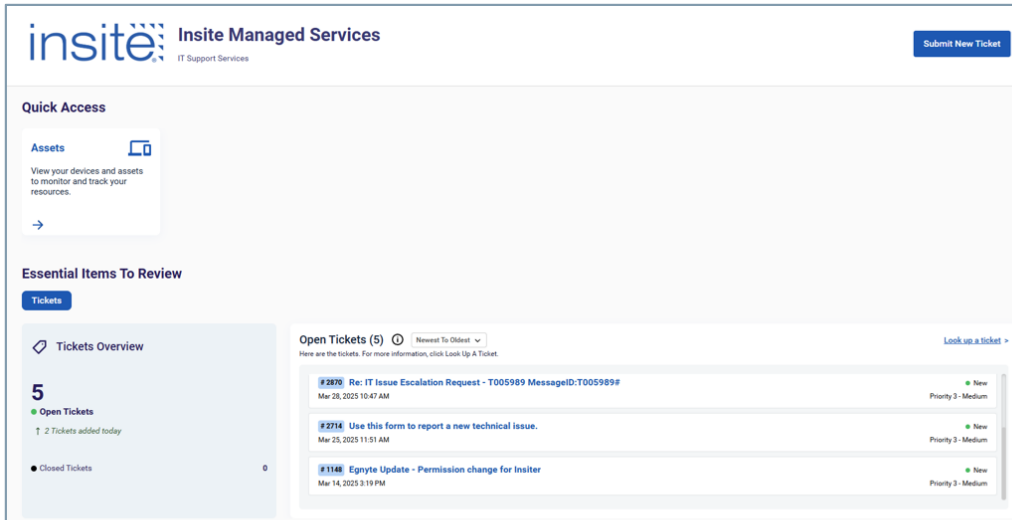


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4

Cleaner Interface

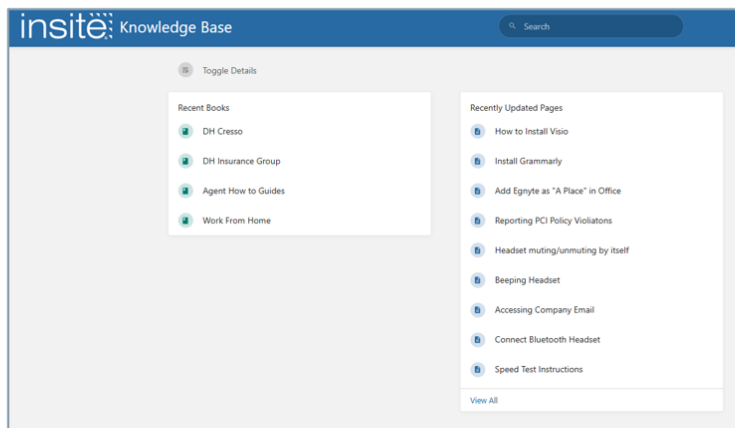
The new portal features a cleaner, more compact design giving you quick access to the functions important to you.



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Updated IT Knowledge Base

We have transitioned our KB to a new platform that is easier to reference and use.



KB.CallInsite.com

Note: Most articles are available to the public but some (anything with private information) does require registration. Simply "sign up" with your Microsoft account for access.



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More to come!!

We are working to implement more features to help support you and your teams more efficiently in the future.

Future feature enhancements include:

- Team-level ticket visibility so you can see what your team is working on
- Dashboards/reports for leaders to get better visibility in technical issues
- Technical project management
- More ways to communicate with the team!