



How to Set Up Your TeamViewer Free Trial

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Introduction

Thank you for evaluating TeamViewer, an industry-leading software solution for remote access and remote support.

Use this guide to ensure a smooth setup. Each step includes either instructions or a link to a Knowledge Base article on how to accomplish that task. If you have any questions, reach out to your account representative.



Step 1: Activate Your Trial License

You should have received an email from TeamViewer with a link to activate the license. This Knowledge Base article outlines the process: [How to Activate Your License](#)



Step 2: Create a Company Profile

Create a Company Profile with a unique name for your organization to enable the Management Console features and allow the central administration of your company's TeamViewer installations.

Learn more in the Knowledge Base: [All About the TeamViewer Company Profile](#).



Step 3: Create a Master Account

A Master Account is a generic administrative account whose credentials will be known to your company's primary TeamViewer administrator(s). This account will be used for all configuration steps going forward so administrative control and ownership is not tied to one specific person. This allows administration of TeamViewer to continue, even if the original administrator leaves that role.

IMPORTANT! *The Master Account must have a valid email address that can receive the account activation email. This can be either a full mailbox or an email distribution list to which you have access.*

Learn more in the Knowledge Base: [Using a Master Account for the TeamViewer Management Console](#).



Step 4: Log in to the Master Account

Once the account is activated, log out of your personal named TeamViewer account and then log into the new Master Account. For the remaining configuration steps — and for future configuration and administration — please use the Master Account.



Step 5: Create and Secure TeamViewer Accounts for Technicians

Creating accounts for your technicians can be done manually, one at a time. Or, you can import people from Active Directory or Azure.

Learn more about the TeamViewer Integration with [Microsoft Active Directory](#).

Create a TeamViewer account manually

1. In your Management Console, look to the upper left and click the **User Management** link. A list of TeamViewer accounts in your Company Profile will appear.
2. To create a new user account, click the **Add User** button in the upper right corner of the page.
3. Define the properties of the account and enter a temporary password. Select **Save**. The user account will be listed in the User Management section.
4. The user will receive an email containing a validation link with the subject, "**TeamViewer account – E-Mail Validation.**" The user must follow the validation link to activate their account.
5. This is when the user should follow the link to set their own secure account password. Or, the Company Administrator can forward the user the password created during the initial account creation.

Add an existing TeamViewer account to your company profile

1. In your Management Console, look to the upper left and click the **User Management** link. A list of TeamViewer accounts in your Company Profile will appear.
2. In the upper right corner of the page, click the **Add Existing User** button. Follow the instructions to send an email invitation to a user to join the company profile.
3. After the user follows the link in the invitation, they will log in with their TeamViewer account credentials and be prompted to enter the Company Administrator email address to request access to the Company Profile.
4. The Company Administrator will receive an email to confirm and accept each user. Once accepted, these users' accounts will be listed in the User Management section of the console.

The first time a user logs in to their TeamViewer account from a different device, they will receive an email asking to authorize the device as a Trusted Device.

Learn more about Trusted Devices in the Knowledge Base:
[What Is 'Trusted Devices' for Your TeamViewer Account?](#)

To avoid using Trusted Devices to authenticate devices, you can use Two-Factor Authentication. This type of authentication involves using a temporary code number from a mobile application to authorize the login attempt.

Learn more about two-factor authentication in these Knowledge Base articles:

[What Is Two-Factor Authentication for Your TeamViewer Account?](#)

[Two-Factor Authentication - Activation and Deactivation](#)

[Security Codes and Apps for Two-Factor Authentication](#)



Step 6: Create Contacts and Organize Them in Groups

Creating contacts and organizing them into groups is highly recommended. Creating contacts allows your techs to easily invite others to remote sessions. Organizing them into groups makes it easier to identify which techs to invite later, or to share in the configuration. For example: your desktop technicians and engineers can go in one group, while your server and database admins can go in a different group.

Create a Contact Group

1. In the Management Console, look at the left sidebar for **Groups > All**. Click **All** to view any groups your account has created, or that have been shared with your account by someone else.
2. In the upper right corner of the console, click the **Add** button, then choose **Add group**.
3. In the first field, enter a name for the contact group. Skip all other options, and at the bottom of the dialog click **Add group**.
4. Repeat steps 1-3 to create additional contact groups.

Create a Contact

1. In the Management Console, look at the left sidebar for **Groups > All**. Click **All** to view any groups that your account has created, or that have been shared with your account by someone else.
2. In the upper right corner of the console, click the **Add** button, then choose **Add contact**.
3. In the first field, enter the email address of the contact you wish to create.
4. In the second field, choose the contact group in which the contact will be stored.
5. At the bottom of the dialog click **Add contact**.
6. Repeat steps 1-5 for any other contacts you want to add.



Step 7: Share Contact Groups

After you've created all your contacts and contact groups, share them as needed.

Learn more in the Knowledge Base: [Sharing groups](#).

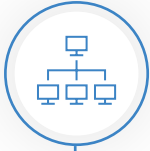


Step 8: Create Computer Groups

(Highly recommended)

Create Computer Groups to organize any devices you want to connect to. Creating these groups before deployment makes it easier to automatically organize computers during deployment.

The steps are the same as creating a Contact Group in step 7.



Step 9: Share Computer Groups

Share computer groups with those techs who need to see and access the computers in the group. Sharing groups is a level of security that ensures techs don't have access to machines outside their responsibility or scope.

For instance, you may have a group of backend servers that only the server team needs to access. Sharing this computer group to only the members of the server team ensures that only they have access to the back-end servers.

The steps are the same as sharing a Contact Group in step 8.



Step 10: Install the Full Client

If you haven't already, [download and install the Full Client for TeamViewer](#). Make sure to select the matching operating system before downloading.

Learn more about the various types of TeamViewer installations such as Full Client, Host, etc., in the Knowledge Base: [TeamViewer Full Version](#).



Step 11: Create One or More Custom Host Configurations

You can create at least one Custom Host Configuration, which allows you to add your company logo, change the displayed text and color scheme, and set specific Host and back-end settings. But most importantly, you can enable auto-assignment of the Host to your Master Admin account.

Learn more in the Knowledge Base: [Customized Host](#).

IMPORTANT! *If you plan to deploy the Custom Host as an MSI file with a software deployment tool, you must check the box titled "Allow account assignment." This will create an API token to be used later during deployment.*

You can create multiple Custom Host Configurations so computers are put into the appropriate groups automatically.

For example, you could create a Custom Host that puts devices in an End User's computer group, then a second one to go into a back-end servers computer group.



Step 12: Deploy the MSI Installer with Your Custom Configuration IDs and API Tokens

After you've customized a Host, you can choose to download the MSI installer and deploy it to your computers.

Learn more about how to download it and create an install command to point to your custom configuration in these Knowledge Base articles:

[How to Download the MSI from Custom Module \(Video tutorial\)](#)

[Deploy the Custom Host Using your API Token and Configuration ID](#)

[Deploy the Custom Host with Microsoft InTune](#)



Step 13: Test Access to Deployed Hosts

After successfully deploying the TeamViewer Host to your first set of computers, please test your preferred access methods.



Step 14: Create Your First Settings Policy

You can create policies to further automate and secure your Host's settings. These allow you to centrally define specific settings for your installed Hosts and your techs' clients, such as:

- Whitelisting access for specific TeamViewer accounts to prevent access by other accounts within or outside the company
- Defining when user confirmation is required
- Ensuring TeamViewer starts with Windows
- Preventing shutdown of the TeamViewer Host
- Requiring admin privileges to change settings locally
- And many more

Learn more about creating policies and descriptions of the available settings in this Knowledge Base article:

[How to Add a New Settings Policy.](#)



Step 15: Create a Custom QuickSupport Module and Make It Available to Users (Optional)

Steps 12-15 outline the creation of a Custom Host to be deployed to end users' PCs. This is the most common configuration in the enterprise as it allows the PCs to appear in the Computers and Contacts list and is needed to enable unattended access. However, there are times when an end user may need support and installing an application is not desired or possible for them. In those situations, the QuickSupport module is an excellent alternative.

Rather than installing a persistent Host application, the end user can download and run a single file, known as the QuickSupport module, for a one-time session. You can customize the appearance and functions of this module like the Host, adding company logos, organizing the customer connection requests in a specific folder, and leaving behind an "SOS Button" to make future requests for support easier.

Learn more about creating custom QuickSupport modules for your users in this Knowledge Base article: [QuickSupport and SOS Button](#).



Step 16: Integrate TeamViewer with Your Business Applications (Optional)

To streamline your workflows, you can integrate TeamViewer with your service desk or mobile device management software solution.

By integrating with your ticketing system, your technicians can create session codes and URLs for attended remote control sessions right within their tickets. Information about the connections will be saved and/or viewable within the ticket.

Integrating with remote or mobile device management solutions increases the efficiency of deploying and connecting to the TeamViewer apps. This ensures a quality support experience for users with managed mobile or desktop devices.

For a complete list of supported integrations and links to their setup articles, visit:

<https://www.teamviewer.com/en-us/integrations/>



Step 17: View Connection Reports

Connection Reports allow you to aggregate the information about your company's TeamViewer sessions and gain insight into your company's TeamViewer usage. This information can be filtered and even exported for further analysis.

1. In the Management Console on the left sidebar, go to **Groups > All** to view all groups.
2. In the right pane near the top, click the tab titled **Connection Reports**.
3. Select the appropriate filters and view the history of TeamViewer connections.
4. To print or export the current report data, look to the upper right corner for the **Export** button. Click this to drop down a menu and choose either **Print list** or **Export to csv**.



Questions?

For questions regarding your TeamViewer trial setup or how to use TeamViewer features, please reach out to your TeamViewer account manager.

Call **1 (800) 638-0253 (toll-free)** or connect with us online: <https://www.teamviewer.com/en-us/support>

About TeamViewer

TeamViewer is a leading global technology company that provides a connectivity platform to remotely access, control, manage, monitor, and repair devices of any kind – from laptops and mobile phones to industrial machines and robots. Though TeamViewer is free of charge for private use, the company has more than 500,000 subscribers and enables companies of all sizes and from all industries to digitalize their business-critical processes through seamless connectivity. Against the backdrop of global megatrends like device proliferation, automation and new work, TeamViewer proactively shapes digital transformation and continuously innovates in the fields of Augmented Reality, Internet of Things, and Artificial Intelligence.

Since the company's foundation in 2005, TeamViewer's software has been installed on more than 2.2 billion devices around the world. The company is headquartered in Goepingen, Germany, and employs more than 1,350 people globally. In 2019, TeamViewer achieved billings of around EUR 325 million. TeamViewer AG (TMV) is listed at Frankfurt Stock Exchange and belongs to MDAX. Further information can be found at www.teamviewer.com.

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