

Using My Account

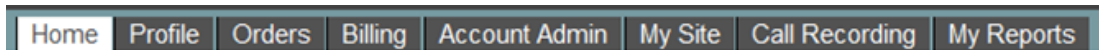
My Account Dashboard Overview

The My Account dashboard provides the BroadCloud PBX customer Administrator a portal for managing numbers, admin and end users, features, devices, reporting, and orders for all the customer's sites.

General Use Tips

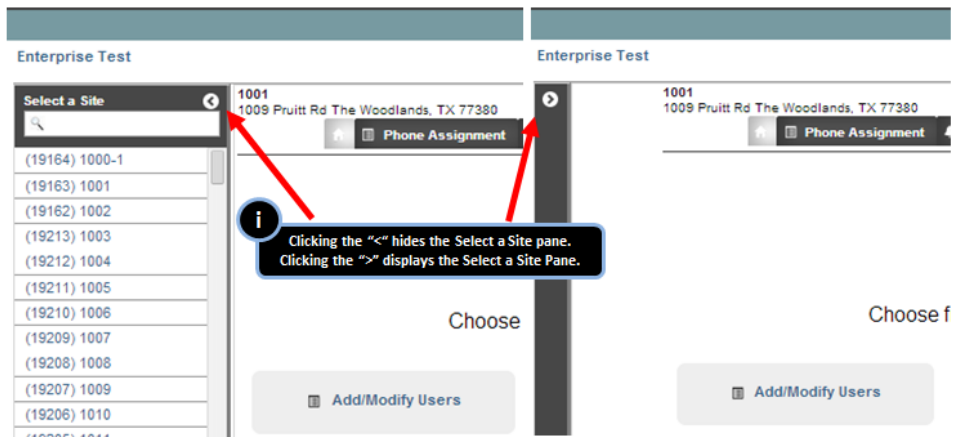
Common elements throughout the My Account layout:

Main Tabs



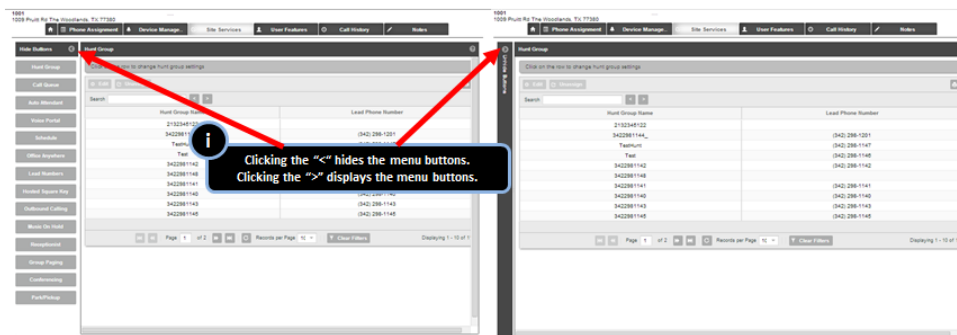
Collapsible Site List

Hide or display the site selection list.



Collapsible Left-hand Menu

For tabs with menu buttons on the left side of the panel, hide or display these selections as needed.



Overview of Menu Tabs

Home

- Account information
- Initiate change orders: Directory Listing, Main Number, Upgrade/Downgrade Numbers

The screenshot shows the 'My Account' portal interface. At the top right, there is a 'My Account' logo. Below it is a navigation bar with tabs: Home, Profile, Orders, Account Admin, My Site, Call Recording, and My Reports. The 'Home' tab is selected. Below the navigation bar, there is a 'Welcome Eruption Audio!' message with links for 'Help', 'English', and 'Logout'. The main content area is divided into two sections: 'Account Information' and 'Manage My Account'. Under 'Account Information', there are fields for 'Account ID' (VII14564) and 'Credit ID' (CRDT01200). Under 'Manage My Account', there are links for 'Profile' and 'Terms and Conditions', with an 'Update' button next to 'Terms and Conditions'. Below this, there is a 'Select a Site' dropdown menu with a search icon and a list of sites: '(14565) Main', '(14566) Site1', and '(14567) Site2'. The main content area is currently empty, displaying 'Please select a site to view.'

- View telephone numbers and assignments for each site

The screenshot shows the 'My Account' portal interface with the 'Main' site selected. The navigation bar and 'Welcome Eruption Audio!' message are the same as in the previous screenshot. The 'Account Information' and 'Manage My Account' sections are also the same. The 'Select a Site' dropdown menu is now set to 'Main'. The main content area displays a 'View Site' section for the 'Main' site. It includes the following information:

- ID:** 14566
- Site Name:** Main
- Site Type:** Hosted PBX Site
- Address:** 3366 Jenks Ave Panama City, FL 32405-4218
- Main Number:** 8505559120

 To the right of this information, there are 'Actions' links: 'Change Main Number', 'Upgrade/Downgrade Numbers', and 'Change Directory Listings'. Below the 'View Site' section, there is a 'My Numbers' button. The main content area is dominated by a table listing telephone numbers and their assignments. The table has the following columns: 'Tel', 'Phone Type', 'Station Type', 'First Name', 'Last Name', 'Address', and 'Call Recording'. The table contains 20 rows of data, each representing a different telephone number and its associated station type and contact information.

Tel	Phone Type	Station Type	First Name	Last Name	Address	Call Recording
8505559120	Main Number	Auto Attendant	.	8505559120	Same as Site Address	N
8505558101	2-Way Number	Call Center DNIS	.	8505558101	Same as Site Address	N
8505559121	2-Way Number	Voice Portal	.	8505559121	Same as Site Address	N
8505559122	2-Way Number	Call Queue	EHG	9122	Same as Site Address	N
8505559123	2-Way Number	Group Paging	GP	8505559123	Same as Site Address	N
8505559124	2-Way Number	Group Paging	GP	8505559124	Same as Site Address	N
8505559125	2-Way Number	Meet-Me Bridge	.	8505559125	Same as Site Address	N
8505559126	2-Way Number	None	.	8505559126	Same as Site Address	N
8505559127	2-Way Number	None	.	8505559127	Same as Site Address	N
8505559128	2-Way Number	None	.	8505559128	Same as Site Address	N
8505559129	2-Way Number	Executive Station	.	8505559129	Same as Site Address	N
8505559130	2-Way Number	Call Center	EHG	9130	Same as Site Address	N
8505559131	2-Way Number	Executive Station	cbanner	8505559131	Same as Site Address	N
8505559132	2-Way Number	Executive Station	.	8505559132	Same as Site Address	N
8505559133	2-Way Number	None	.	8505559133	Same as Site Address	N
8505559134	2-Way Number	Executive Station	U134	8505559134	Same as Site Address	N
8505559135	2-Way Number	Executive Station	David	Lee	Same as Site Address	N
8505559136	2-Way Number	None	.	8505559136	Same as Site Address	N
8505559137	2-Way Number	None	.	8505559137	Same as Site Address	N
8505559138	2-Way Number	Executive Station	BB	Bill	Same as Site Address	N
8505559139	2-Way Number	None	.	8505559139	Same as Site Address	N
8505559140	2-Way Number	Call Center	EHG	9140	Same as Site Address	N
8505559141	2-Way Number	Call Queue	EHG	9141	Same as Site Address	N

Profile

View Site info, Contact Info, and Login information.

Home Profile Orders Account Admin My Site Call Recording My Reports

Eruption Audio Welcome Eruption Audio! Help English Logout

Account ID: VM14564
Assign service charges per site?: No
Name: Eruption Audio

Site(s) Contact Info Login

Double-click on box above to show all, or start typing a site name to search (case-sensitive)

Site(s): Main

Contact Information

Note: This is the actual physical address for this Site for E911 purposes and will be given to emergency responders such as Fire Department, Police, etc. when E911 is called. Be careful and accurate in providing this address. No P.O. Box numbers please.

Country: United States
Address 1: 3366 Jenks Ave
Address 2:
City: Panama City
State: Florida
Zip/Postal Code: 32405-4218

Site Name: Main
Type: Hosted PBX Site
Site Contact Name: Michael Anthony
Phone Number: +18555559120
Fax Number:
Email Address: user@domain.com
Time Zone: US Central Time

Agreement/Approval Date: 13903 /Apr 18, 2014 12:29 PM

Save

Order Tracking & Management

View list and status of orders by site. Prompts for required customer action are in the right column.

Home Profile Orders Account Admin My Site Call Recording My Reports

Eruption Audio Welcome Eruption Audio! Help English Logout

Displaying - of 1 - 16 of 16 Orders

Order Id	Type	Customer	Site Name	Order Date	Status	Action
WS14252	Add Order	Eruption Audio	Main	5/16/14	Install Complete	View Order
WS14100	Add Order	Eruption Audio	Main	5/8/14	Completed	View Order
WS14043	Add Order	Eruption Audio	Main	5/5/14	Completed	View Order
WS14040	Add Order	Eruption Audio	Site 1	5/5/14	Install Pending	View Order
WS14002	New Order	Eruption Audio	Site 3	5/1/14	Install Pending	View Order
WS14000	Add Order	Eruption Audio	Main	4/30/14	Working	View Order
WS13966	Add Order	Eruption Audio	Main	4/26/14	Completed	View Order
WS13965	New Order	Eruption Audio	Site 12	4/25/14	Pending Site Survey	View Order
WS13964	New Order	Eruption Audio	Site 10	4/25/14	Pending Site Survey	View Order
WS13963	New Order	Eruption Audio	Site 15	4/25/14	Working	View Order
WS13962	New Order	Eruption Audio	Site 13	4/25/14	Working	View Order
WS13961	New Order	Eruption Audio	Site 11	4/25/14	Working	View Order
WS13945	New Order	Eruption Audio	Site 1	4/24/14	Created	View Order
WS13905	New Order	Eruption Audio	Site2	4/18/14	Completed	View Order
WS13904	New Order	Eruption Audio	Site1	4/18/14	Completed	View Order
WS13903	New Order	Eruption Audio	Main	4/18/14	Completed	View Order

Account Admins

Create and manage additional admin users.

Home Profile Orders Account Admin My Site Call Recording My Reports

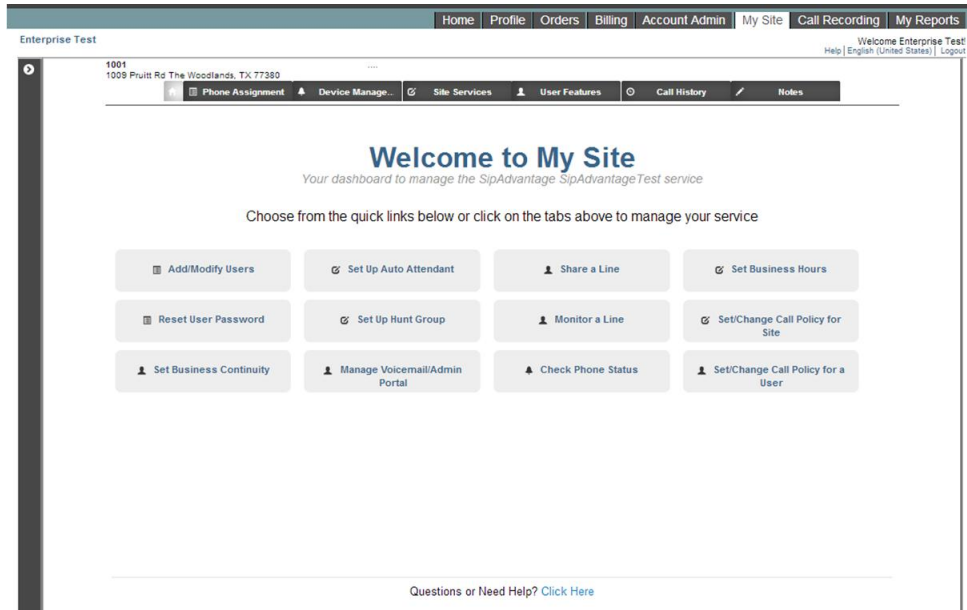
Eruption Audio Welcome Eruption Audio! Help English Logout

Create Account Admin

Name	User Login	Enabled	Created By	Action
Edward Test	R15EruptionA.dmi2	Y	Michael Anthony	View/Edit

My Site

Assign stations, devices, and users to telephone numbers, manage features and devices, and view notes and call history for a given site.



More detail is available in the [Using My Site QRG](#).

Call Recording

If a customer has subscribed to the Call Recording service, user recordings can be managed via this tab.

