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

- View telephone numbers and assignments for each site
Profile
View Site info, Contact Info, and Login information.

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

Account Admins
Create and manage additional admin users.
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.
**My Reports**
Generate on reports on Call History, call Queue stats, and Auto Attendant.