



## How to Use Guide: My Business Account Setup

---

*Last updated: 8/18/2011*

### **Overview**

The way you set up My Business Account determines how you manage your company's wireless accounts. You can create a company structure that will allow you to manage user access to all or parts of your business in a way that is meaningful to you (i.e. departments, cost centers, location, etc.). You can also create and assign users to different billing accounts.

### **Table of Contents**

#### **General Information**

- User Role Access

#### **One administrator**

- Standard Setup
- Set Up & Delegate Administrator Access
- Set Up & Grant Access to Additional User(s)

#### **Multiple administrators**

- Standard Setup



## User Role Access

### What can each user role do within My Business Account?

**Administrator** – Users have access to the complete menu options. Note: There can be multiple administrators.

**Analyst** – Users have access to the complete menu options but can not create or edit users, assign users to billing accounts, wireless numbers or company structures, or create or modify company structures.

**Buy** – Users have access to all transactions within the Orders tab. Note: The Buy role cannot change voice plans when upgrading a device on an existing line, but this role is able to change text messaging and data plans.

**Maintain** – Users have access to all menu options, except for the Administration menu, Payments sub-menu, and Upgrade Equipment Transaction.

**Maintain & Pay** – Users have access to all menu options, except for the Orders screen and the following Settings options: Company Users, Billing Accounts, and Company Structure.

**Product & Service** – Users have access to the Account Maintenance menu option to manage Custom Applications that their company has opted to set up. All other menu options and Account Maintenance transactions are not available.

**Reporting** – Users have access to all menu options, except for Administration, Payments and Account Maintenance. These users will receive a monthly email when all bills have been loaded in the application.

**View Only** – Users have view-only access to Overview, Billing (except Payments), and Reports menu options. Note: Access to Account Reports or Wireless Number Reports is determined by the accounts and / or wireless numbers to which the user has been granted access.

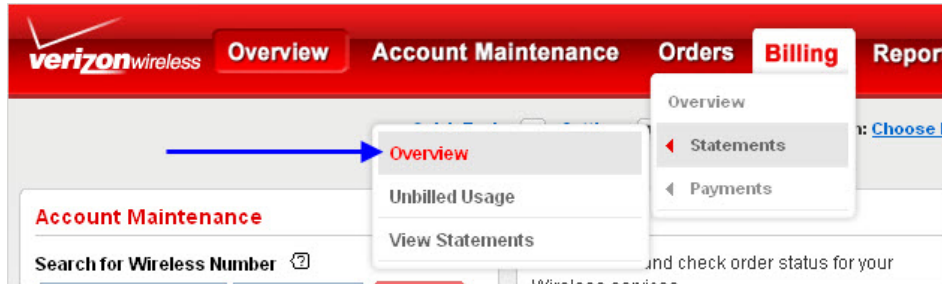
**View and Pay** – Users have view-only and payment capabilities.

Menu Tab or DropDown	Administrator	Analyst	Buy	Maintain	Maintain and Pay	Product & Service	Reporting	View Only	View and Pay
Main	✓	✓	✓	✓	✓		✓		
Overview	✓	✓	✓	✓	✓		✓		
Account Maintenance	✓	✓		✓	✓	✓			
Orders	✓	✓	✓						
Billing	✓	✓		✓	✓		✓	✓	✓
Reports	✓	✓		✓	✓		✓	✓	✓
Support	✓	✓	✓	✓	✓	✓	✓	✓	
Settings	✓	✓	✓	✓	✓	✓	✓	✓	✓
Utilities	✓	✓	✓	✓	✓	✓	✓	✓	✓

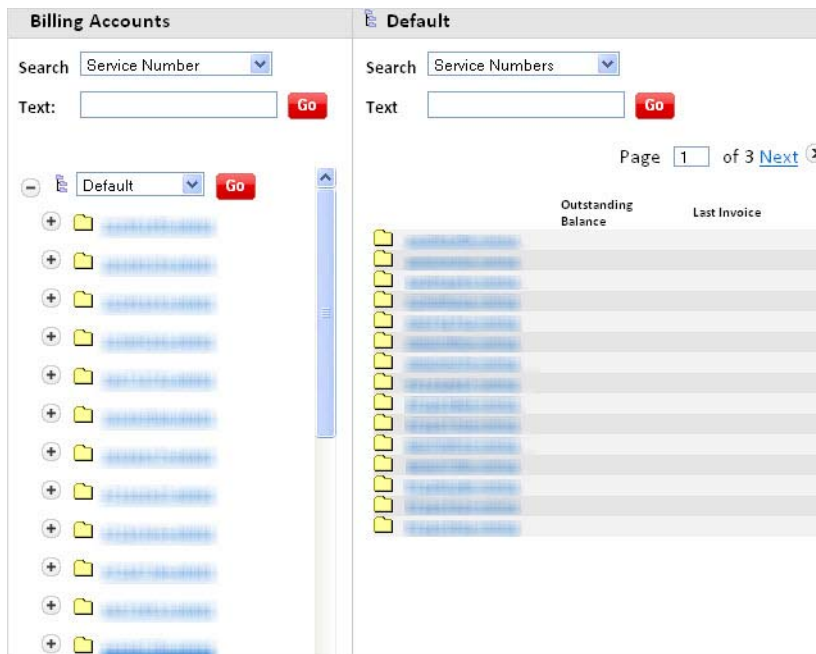


## One Administrator: Standard Set Up

1. To begin setup, hover your mouse over **Billing**, then hover over **Statements** and click on **Overview**. The Billing Overview page will appear.



2. From the Overview page, your company's billing accounts are clearly listed. Each folder icon represents a billing account.



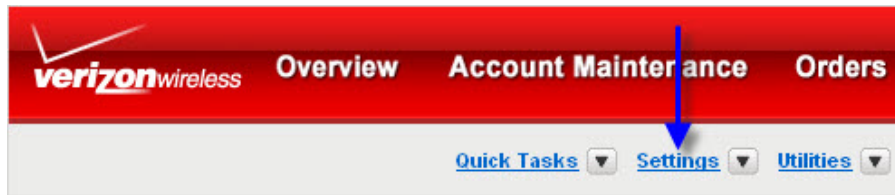




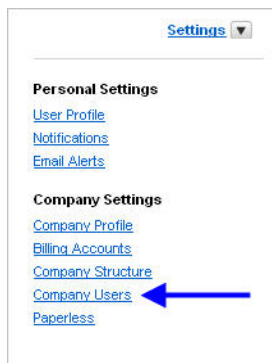
**One Administrator: Set Up & Delegate Administrator Access** From the My Business Account Overview page, you can easily add users, and assign and change access privileges for new and existing users. To setup and delegate administrator access, you will first need to add the person with the administrator role, and then assign wireless accounts to the new administrator.

Note: Adding users and assigning access privileges does not complete the set up process. After completing these steps you will need to assign billing accounts / wireless numbers to the user.

1. Click on the **Settings** dropdown.



2. Go to the **Company Users** page.





- Click on the **Add a User** button on the upper right hand side of the page.

**Company Users**

**Add a User**

Below is a list of company users who are enrolled in this account. [Add a User](#)

**List of Company Users**

Search for Users  [Go](#)

**Search Results** Page 1 of 8 [Next](#)

User ID	Name	Role	User Type(s)	Internet Status	Actions
XXXXXXXXXX	XXXXXXXXXX	Administrator	Wireless		<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Reset Password</a>
XXXXXXXXXX	XXXXXXXXXX	Agent	Wireless		<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Reset Password</a>
XXXXXXXXXX	XXXXXXXXXX	Rep	Wireless		<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Reset Password</a>
XXXXXXXXXX	XXXXXXXXXX	Manager	Wireless		<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Reset Password</a>
XXXXXXXXXX	XXXXXXXXXX	Administrator	Wireless		<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Reset Password</a>
XXXXXXXXXX	XXXXXXXXXX	Rep	Wireless		<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Reset Password</a>

- Enter the new user's information. Under the **Role** dropdown, select **Administrator** and click **Continue**.

**Add Company User**

[Add a User](#) → Assign User → Confirmation

\* Indicates required field

**Add Company Users**

First Name \*

Last Name \*

Phone Number

Email Address \*

Role \*  [Need help finding a role?](#)

User ID \*  User ID must be at least 6 characters.

New Password \*  Password must contain at least 8 characters, including an uppercase letter, a lowercase letter, and a number.

Confirm New Password \*

Access Rights:  Push To Talk  Group Communication  Machine to Machine

[Cancel](#) [Continue](#)



5. You will be presented with a summary of the information you entered.
  - a. Confirm the accuracy of the information and click **Continue**.

### Add Company User Confirm

[Add a User](#) → [Assign User](#) → [Confirmation](#)

Please confirm that the details below are correct.

First Name:	Jeff
Last Name:	Crab
Email Address:	jeffcrab@crab.com
Phone Number:	555-555-5555
User Name:	jeffcrab
New Password:	*****
Confirm New Password:	*****
Role:	Administrator

Access Rights:

- Push To Talk
- Group Communication
- Machine to Machine
- Split Bill

Split Bill Access Code

You must notify the user of their username and password.

[Cancel](#) [Continue](#)

- b. Click **I Accept** to proceed with creating a new user.

Close X

You are creating a user that has buying authority and the authority to create other users with buying authority.

[Cancel](#) [I Accept](#)

Note: You have now successfully added an administrator; however, the next step is to add the new user to a Company or Billing Structure.



6. Click on the **Structure** dropdown and select **Billing Structure**.

**Manage Billing Account Users**

Add a User ✓ Assign User Confirmation

1. Select the structure Billing Structure
2. Select the folder to which Billing Structure the user
3. Select the "Users" Tab Company Structure
4. Select "Unassigned" from the drop down and refresh
5. Find and select the user created and choose "Assign"

Search Service Number Go

Default

Users

Name: Default

Location: Default

Description:

7. Click on the account number you would like to assign for the user.

Add a User ✓ Assign User Confirmation

1. Select the structure Billing Structure
2. Select the folder to which you would like to assign the user
3. Select the "Users" Tab
4. Select "Unassigned" from the drop down and refresh
5. Find and select the user created and choose "Assign"

Search Service Number Go

Default (58/58)

22278: -00001

Users

Name: -00001

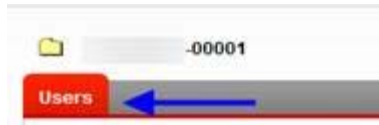
Location: Default -00001

Description: -00001

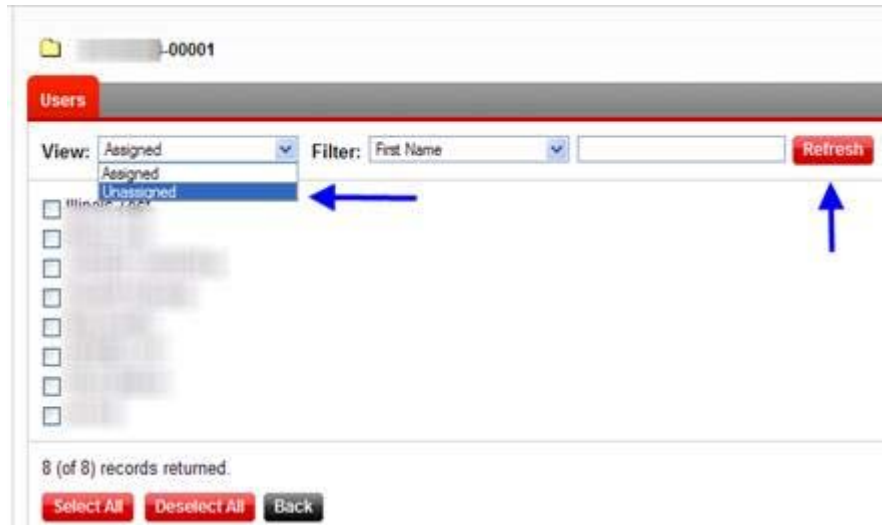




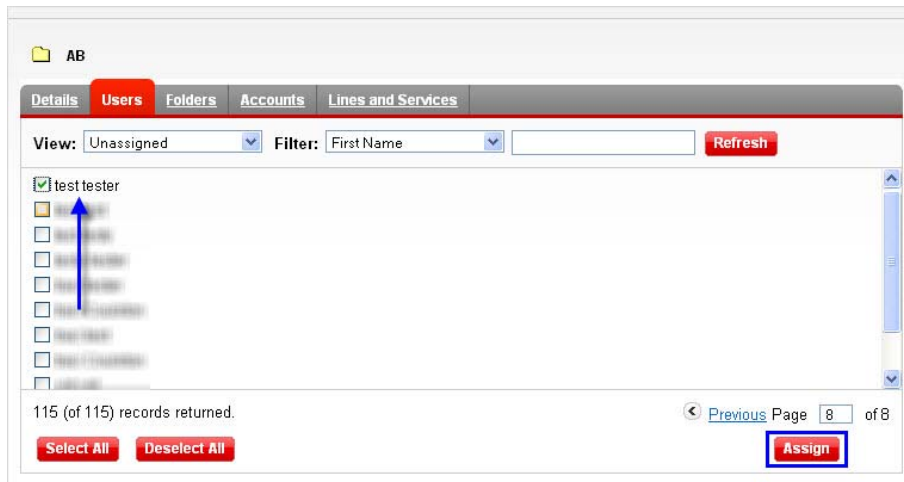
8. Click on the **Users** tab.



9. Select **Unassigned** from the **View** dropdown menu and click **Refresh**.



10. Check the box next to the user you want to add, and click the **Assign** button.

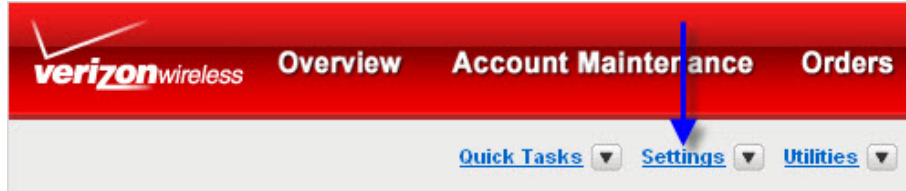


You have completed adding and assigning a new user.

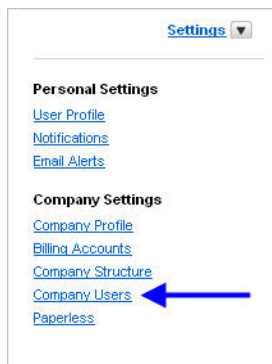


## One Administrator: Set Up & Grant Access to Additional User(s)

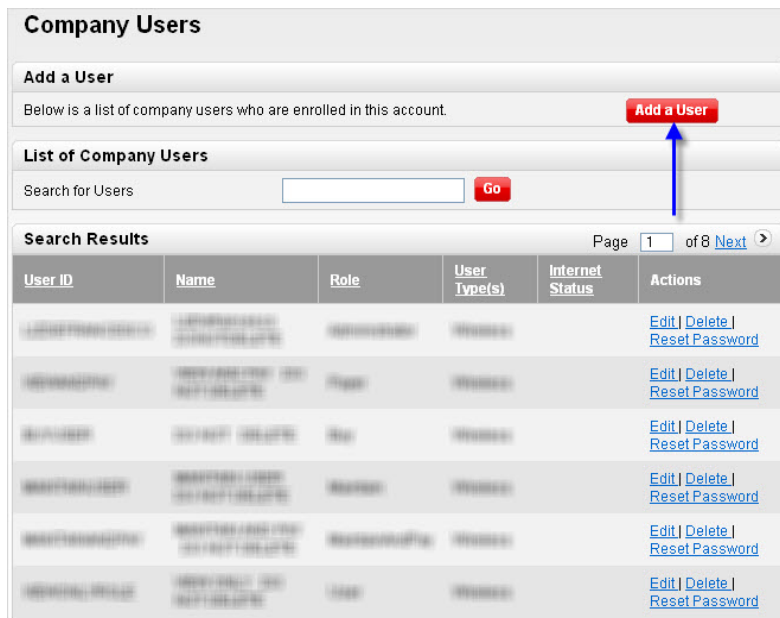
1. Click on the **Settings** dropdown.



2. Go to the **Company Users** page.



3. Click on the **Add a User** button on the upper right hand side of the page.





4. Enter the new user's information. Select a user role from the **Role** dropdown, and click **Continue**.

### Add Company User

**Add a User** → Assign User → Confirmation

\* Indicates required field

#### Add Company Users

First Name *	<input type="text"/>	
Last Name *	<input type="text"/>	
Phone Number	<input type="text"/>	
Email Address *	<input type="text"/>	
Role *	<input type="text" value="View Only"/>	<a href="#">Need help finding a role?</a>
User ID *	<input type="text"/>	User ID must be at least 6 characters.
New Password *	<input type="password"/>	Password must contain at least 8 characters, including an uppercase letter, a lowercase letter, and a number.
Confirm New Password *	<input type="password"/>	

[Cancel](#) [Continue](#)

5. You will be presented with a summary of the information you entered. Confirm the accuracy of the information and click **Continue**.

### Add Company User Confirm

**Add a User** → Assign User → Confirmation

Please confirm that the details below are correct.

First Name:	Jeff
Last Name:	Graf
Email Address:	jeffgraf@graf.com
Phone Number:	(512) 456-7890
User Name:	jeffgraf
New Password:	*****
Confirm New Password:	*****
Role:	Administrator
Access Rights:	<input type="checkbox"/> Push To Talk <input type="checkbox"/> Group Communication <input type="checkbox"/> Machine to Machine <input type="checkbox"/> Split Bill
Split Bill Access Code	

You must notify the user of their username and password.

[Cancel](#) [Continue](#)



6. Click on the **Structure** dropdown and select **Billing Structure**.

**Manage Billing Account Users**

Add a User ✓ Assign User Confirmation

1. Select the structure Billing Structure
2. Select the folder to which Billing Structure the user
3. Select the "Users" Tab Company Structure
4. Select "Unassigned" from the drop down and refresh
5. Find and select the user created and choose "Assign"

Search Service Number Go

Default

Users

Name: Default

Location: Default

Description:

7. Click on the account number you would like to assign for the user.

Add a User ✓ Assign User Confirmation

1. Select the structure Billing Structure
2. Select the folder to which you would like to assign the user
3. Select the "Users" Tab
4. Select "Unassigned" from the drop down and refresh
5. Find and select the user created and choose "Assign"

Search Service Number Go

Default (58/58)

22278: -00001

Users

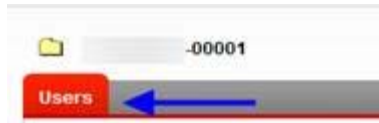
Name: -00001

Location: Default -00001

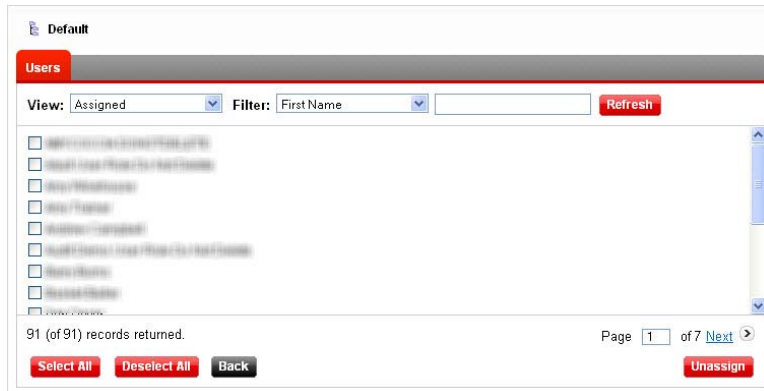
Description: -00001



8. Click on the **Users** sub-tab in the right hand pane.



9. The page defaults to show the users assigned to the billing account.

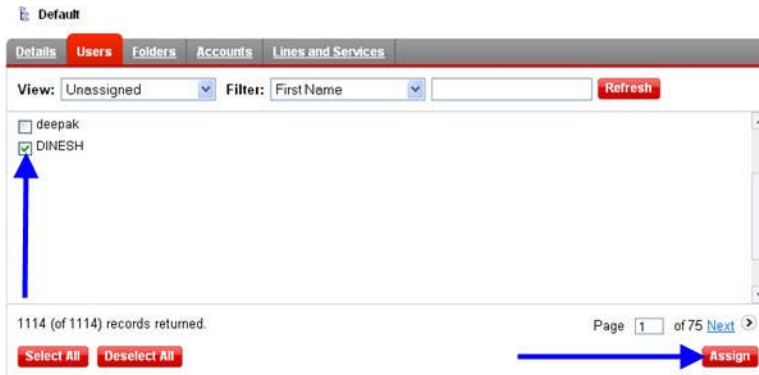


10. Select **Unassigned** from the **View** dropdown menu and click **Refresh**.





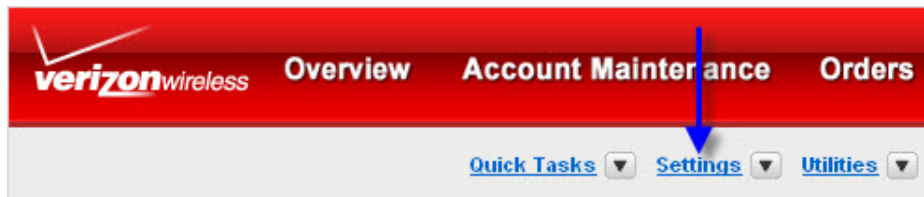
11. Check the box next to the new user's name and click the **Assign** button.



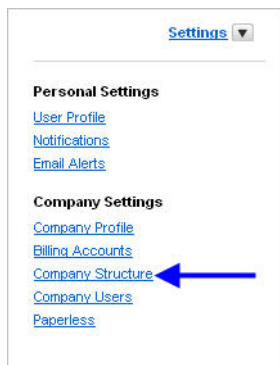
You have now successfully added a new user. Repeat steps 1-11 for all new users you add to the account.

## Multiple Administrators: Standard Setup

1. Click on the **Settings** dropdown.



2. Go to the **Company Structure** page.





3. Enter the name and description of the company structure, and click **Create**. You have successfully created a company structure.

Create a new Company Structure.

Name:

Description:

Note: Refer to the [How to Use Guide: Understanding a Company Structure](#) for detailed information on company structure maintenance. The structure name can be up to 30 characters; the description can be up to 50.

4. You will now see the name of the new company structure in the left hand window. Click on the **+** next to the name.

Search

[ABC Company](#)

**ABC Company**

Name:

Description:

5. Click on the **Unassigned** folder.

[ABC Company \(3/3\)](#)

- [Unassigned 509](#)
- [Canada](#)
- [U.S. \(2/2\)](#)
- [East](#)
- [West \(2/2\)](#)
- [Marketing](#)
- [Sales](#)

6. Click on the **Accounts** sub-tab in the right hand pane.

**ABC Company**

**Details**

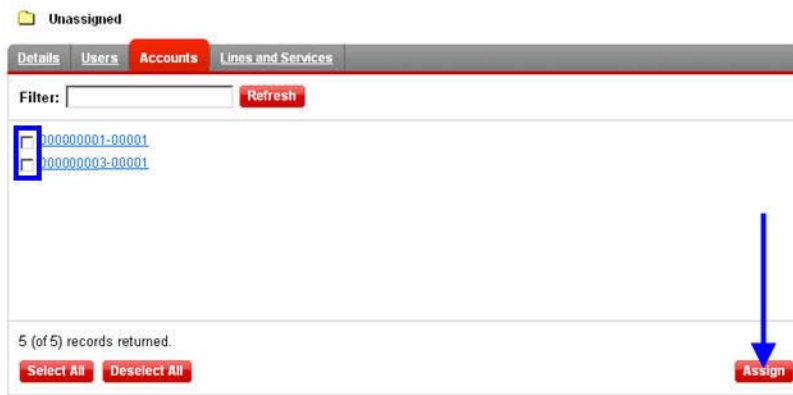
Name: ABC Company

Location: ABC Company

Description:

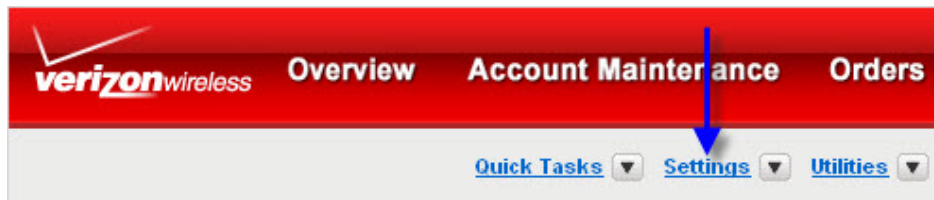


- The account numbers will now appear. Check the boxes next to the account(s) you want to assign, and click **Assign**.

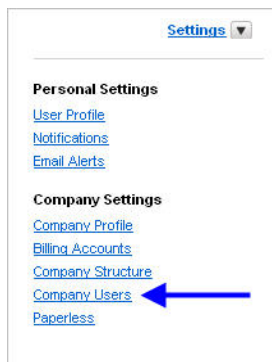


You have now successfully assigned account(s) to the new company structure. The next step is to assign an administrator to the structure.

- Click on the **Settings** dropdown.



- Go to the **Company Users** page.







- Click the **Add a User** button on the upper right hand side of the page.

**Company Users**

**Add a User**

Below is a list of company users who are enrolled in this account. [Add a User](#)

**List of Company Users**

Search for Users  [Go](#)

**Search Results** Page 1 of 8 [Next](#)

User ID	Name	Role	User Type(s)	Internet Status	Actions
XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Reset Password</a>
XXXXXXXXXX	XXXXXXXXXX	XXXX	XXXXXXXXXX	XXXXXXXXXX	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Reset Password</a>
XXXXXXXXXX	XXXXXXXXXX	XX	XXXXXXXXXX	XXXXXXXXXX	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Reset Password</a>
XXXXXXXXXX	XXXXXXXXXX	XXXXXX	XXXXXXXXXX	XXXXXXXXXX	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Reset Password</a>
XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Reset Password</a>
XXXXXXXXXX	XXXXXXXXXX	XXXX	XXXXXXXXXX	XXXXXXXXXX	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Reset Password</a>

- Enter the new user's information. Under the **Role** dropdown, select **Administrator** and click **Submit**.

**Add Company User**

[Add a User](#) > [Assign User](#) > [Confirmation](#)

\* Indicates required field

**Add Company Users**

**First Name \***

**Last Name \***

**Phone Number**

**Email Address \***

**Role \***  [Need help finding a role?](#)

**User ID \***  User ID must be at least 6 characters.

**New Password \***  Password must contain at least 8 characters, including an uppercase letter, a lowercase letter, and a number.

**Confirm New Password \***

**Access Rights:**  Push To Talk  Group Communication  Machine to Machine

[Cancel](#) [Continue](#)



12. You will be presented with a summary of the information you entered.
  - a. Confirm the accuracy of the information and click **Continue**.

### Add Company User Confirm

[Add a User](#) → [Assign User](#) → [Confirmation](#)

Please confirm that the details below are correct.

First Name:	Jeff
Last Name:	Geef
Email Address:	jeffgeef@geef.com
Phone Number:	(555) 555-5555
User Name:	jeffgeef
New Password:	*****
Confirm New Password:	*****
Role:	Administrator
Access Rights:	<input type="checkbox"/> Push To Talk <input type="checkbox"/> Group Communication <input type="checkbox"/> Machine to Machine <input type="checkbox"/> Split Bill
Split Bill Access Code	

You must notify the user of their username and password.

[Cancel](#) [Continue](#)

- b. Click **I Accept** to proceed with creating a new user.

[Close](#) x

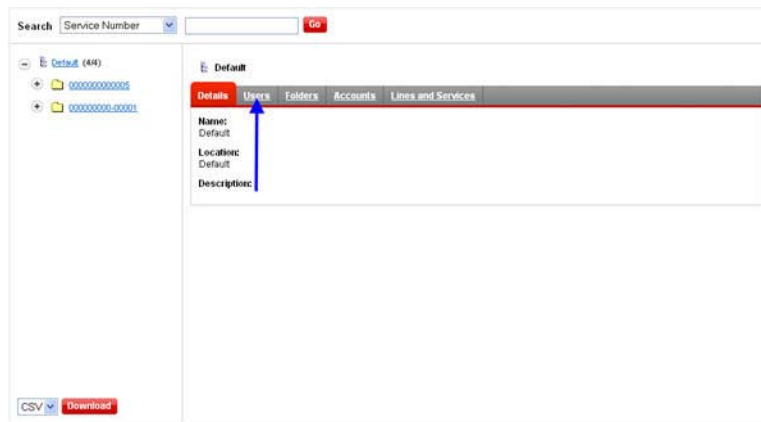
You are creating a user that has buying authority and the authority to create other users with buying authority.

[Cancel](#) [I Accept](#)

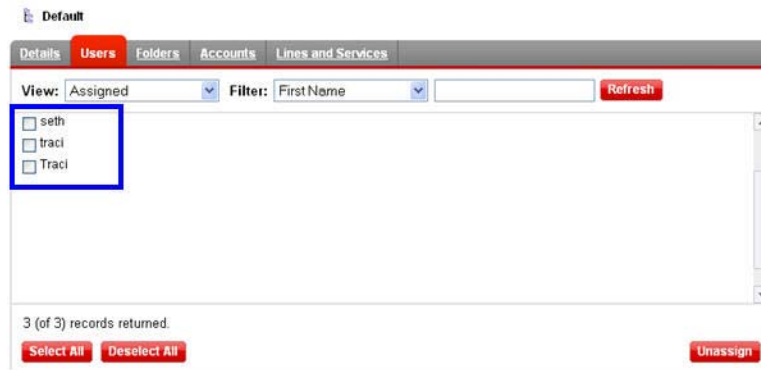
Note: You have now successfully added an administrator; however, the next step is to assign billing accounts.



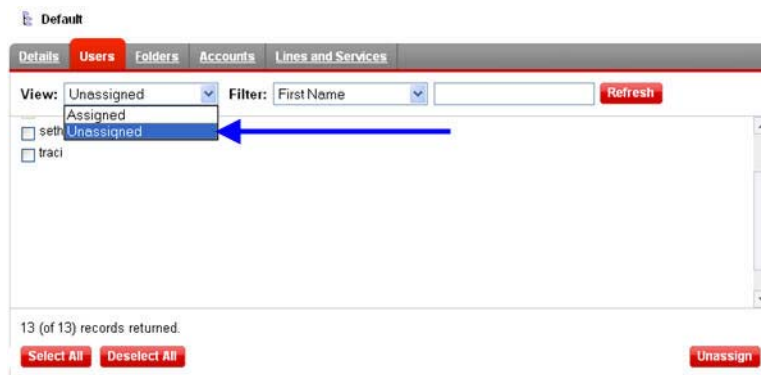
13. Click on the **Users** sub-tab in the right hand pane.



14. The page defaults to show the users who are currently assigned to the billing account.

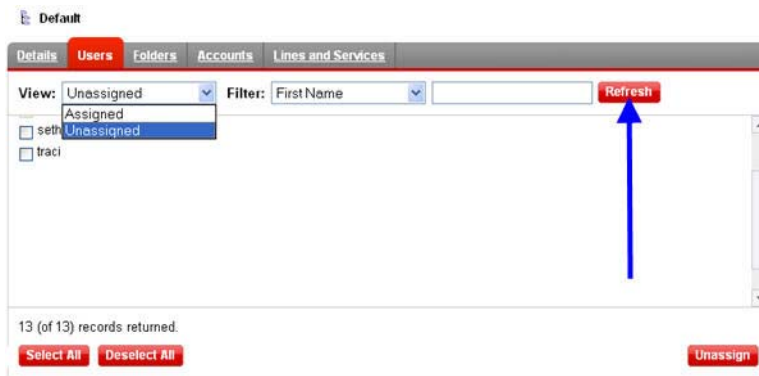


15. To assign the new administrator, change the **View** dropdown to **Unassigned**.

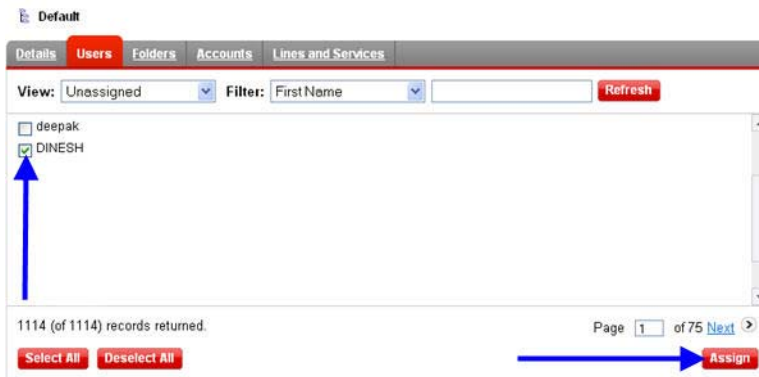




16. Click the **Refresh** button, and you should see the new administrator's name appear on the list.



17. Check the box next to the new administrator's name, and click the **Assign** button.



You have now successfully added your new administrator. Repeat steps 7-17 for each administrator you want to assign.