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

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.

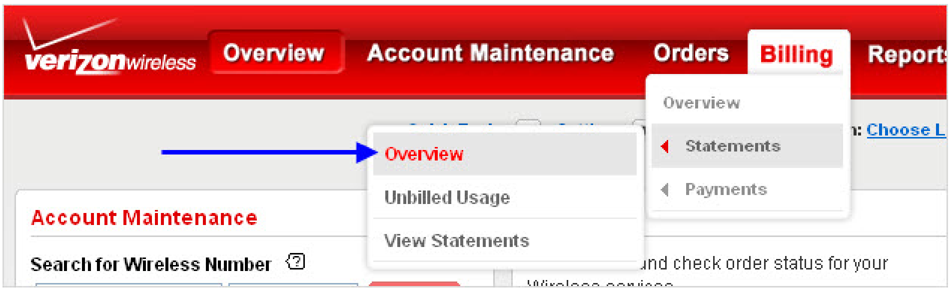
View Only – Users have view-only access to Overview, Billing (except Payments), and Reports menu options. Note: Access to Account Reports or Wireless Number Reports is determined by the accounts and / or wireless numbers to which the user has been granted access.

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

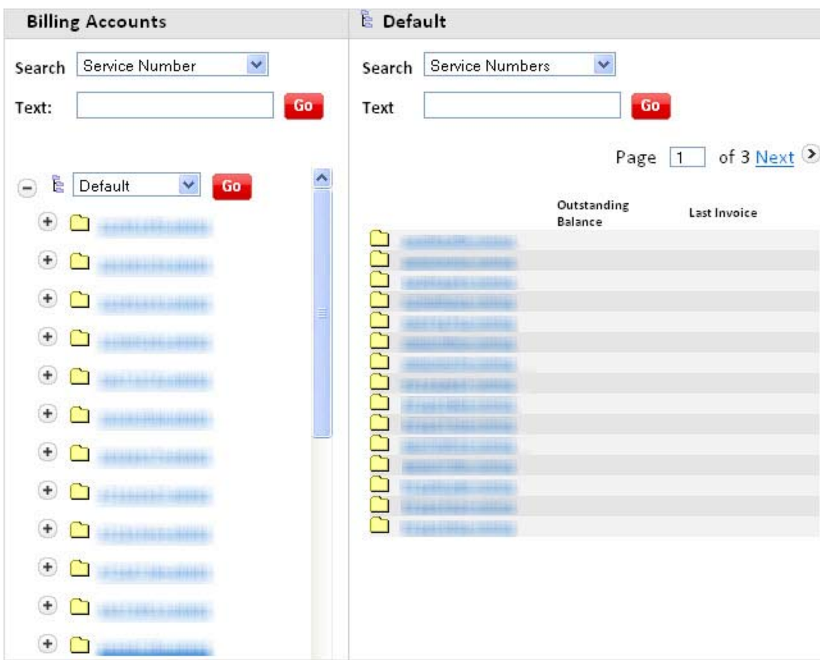
Menu Tab or DropDown	Administrator	Analyst	Buy	Maintain	Maintain and Pay	Product & Service	Reporting	View Only	View and Pay
Main Overview	✓	✓	✓	✓	✓		✓		
Account Maintenance	✓	✓		✓	✓	✓			
Orders	✓	✓	✓						
Billing	✓	✓		✓	✓		✓	✓	✓
Reports	✓	✓		✓	✓		✓	✓	✓
Support	✓	✓	✓	✓	✓	✓	✓	✓	
Settings	✓	✓	✓	✓	✓	✓	✓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

One Administrator: Standard Set Up

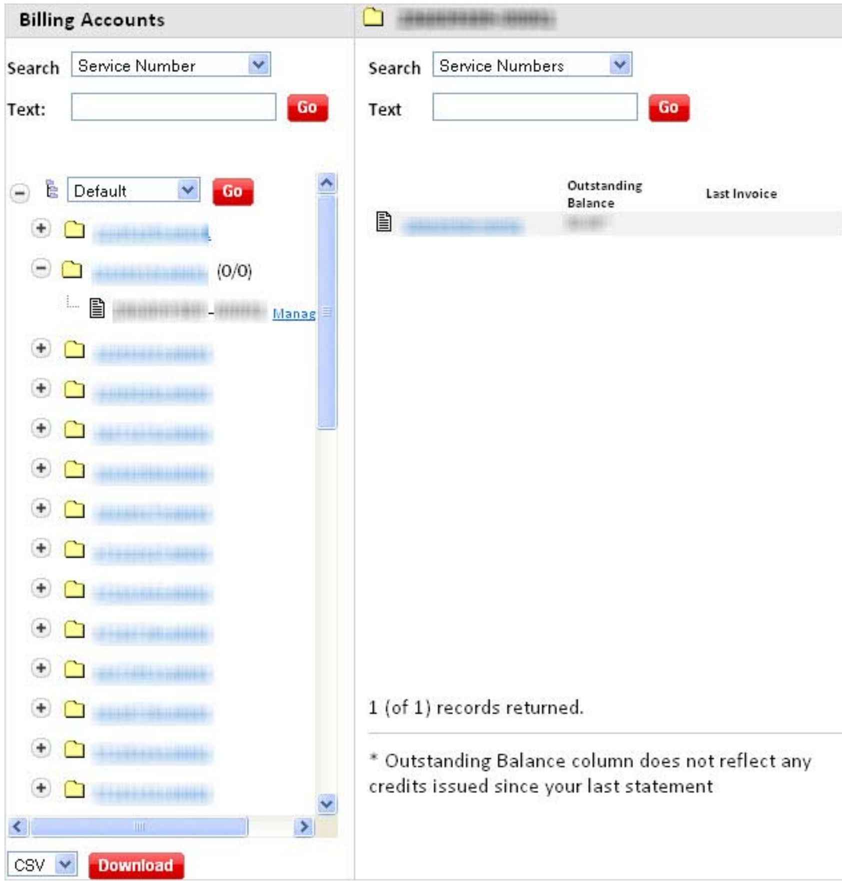
1. To begin setup, hover your mouse over **Billing**, then hover over **Statements** and click on **Overview**. The Billing Overview page will appear.



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



3. To view the wireless numbers associated with each account, click on the ⊞ next to the account number.

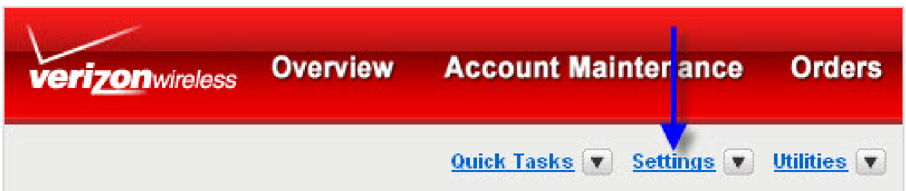


You have now completed standard set up.

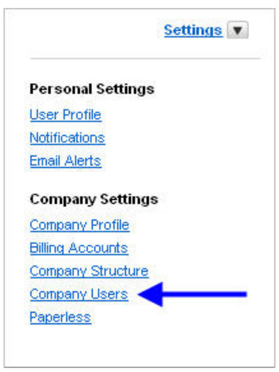
One Administrator: Set Up & Delegate Administrator Access From the My Business Account Overview page, you can easily add users, and assign and change access privileges for new and existing users. To setup and delegate administrator access, you will first need to add the person with the administrator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

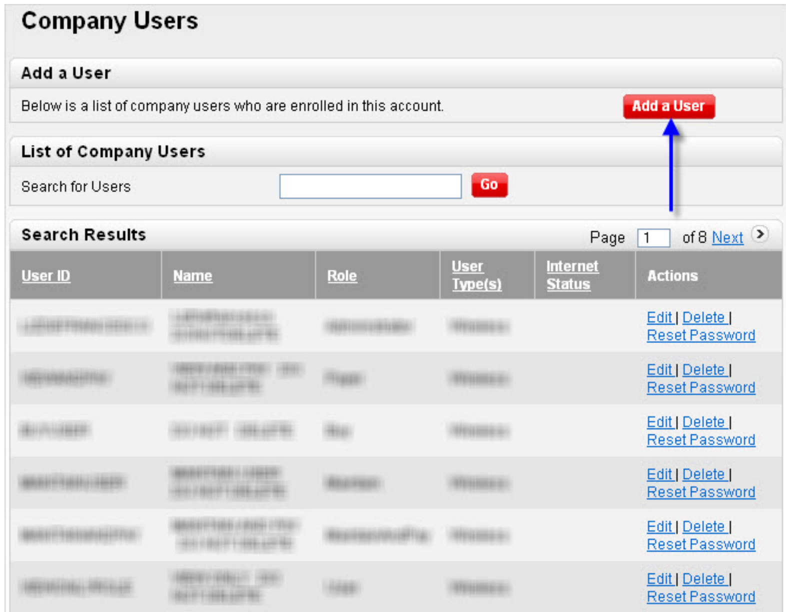
1. Click on the **Settings** dropdown.



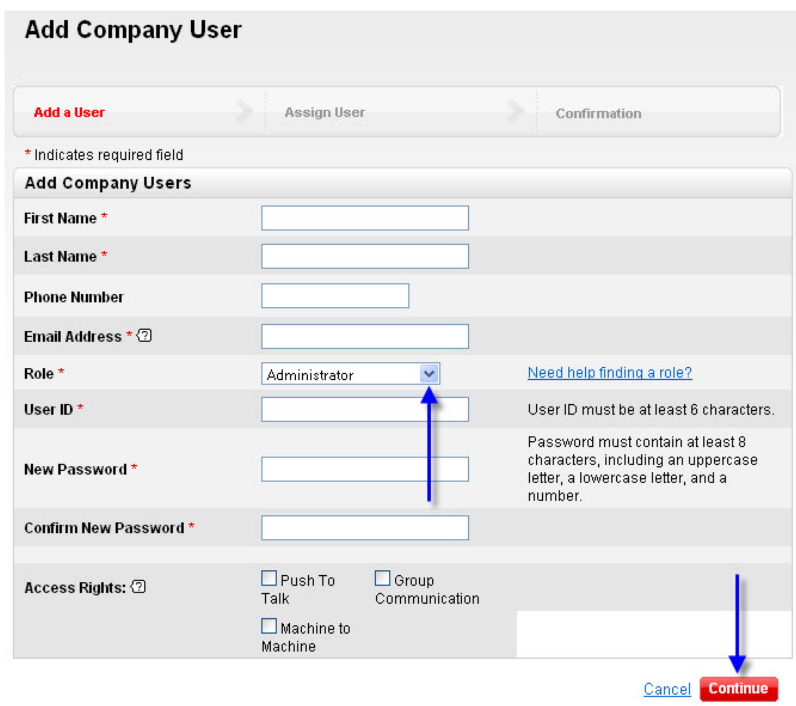
2. Go to the **Company Users** page.



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

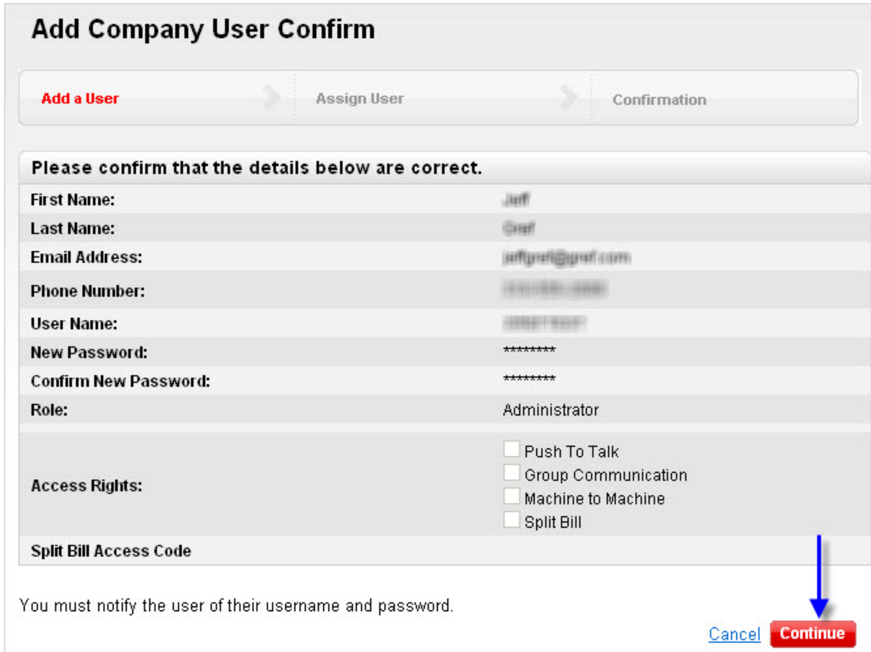


4. Enter the new user's information. Under the **Role** dropdown, select **Administrator** and click **Continue**.



5. You will be presented with a summary of the information you entered.

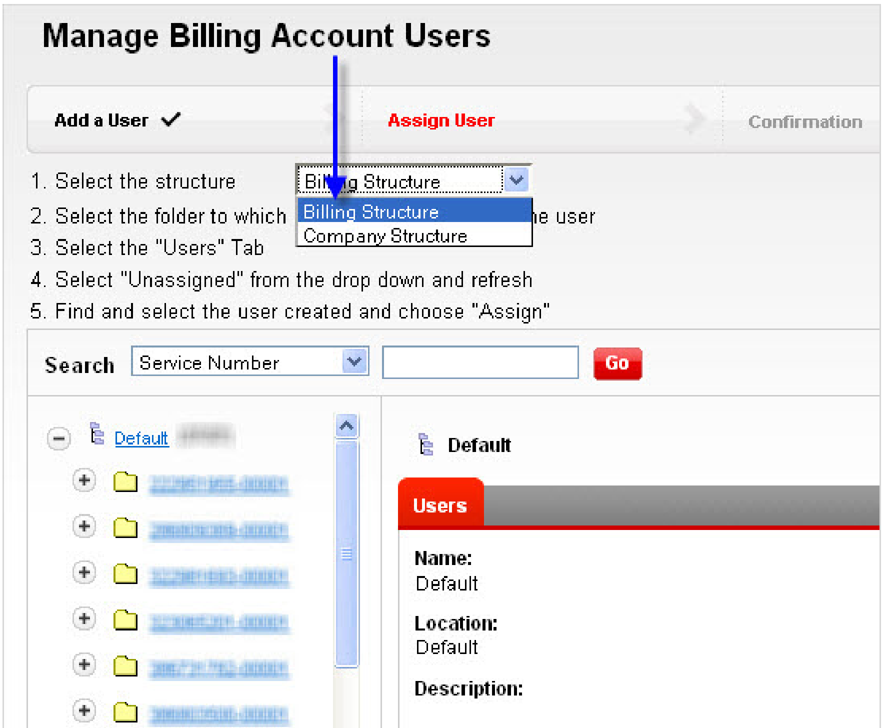
   a. Confirm the accuracy of the information and click **Continue**.



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

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

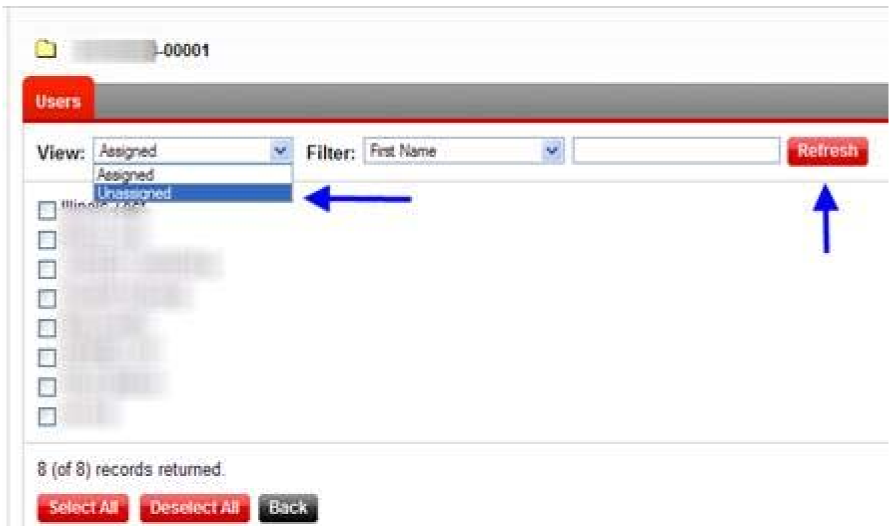
6. Click on the **Structure** dropdown and select **Billing Structure**.



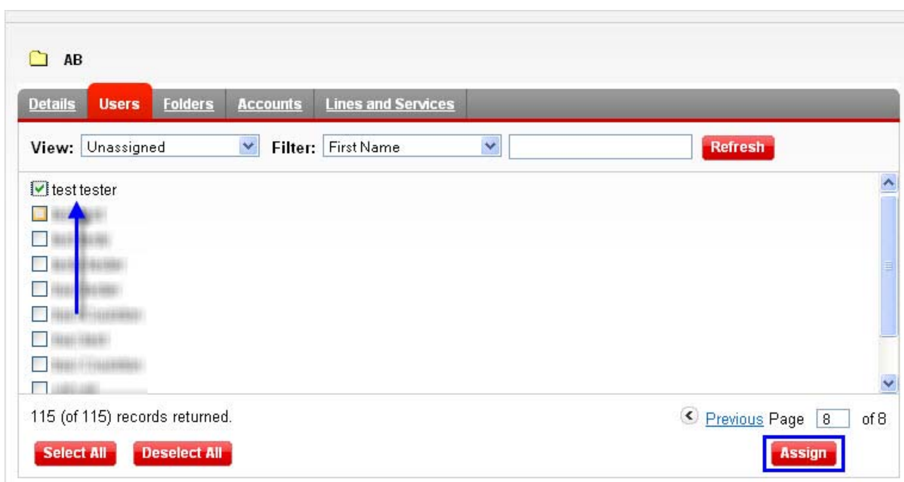
7. Click on the account number you would like to assign for the user.

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

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



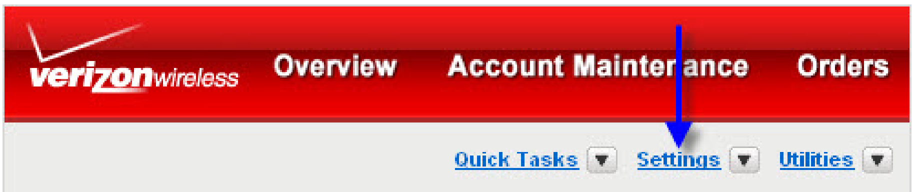
10. Check the box next to the user you want to add, and click the **Assign** button.



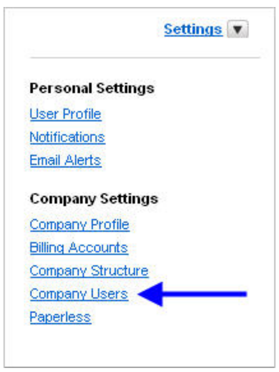
You have completed adding and assigning a new user.

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

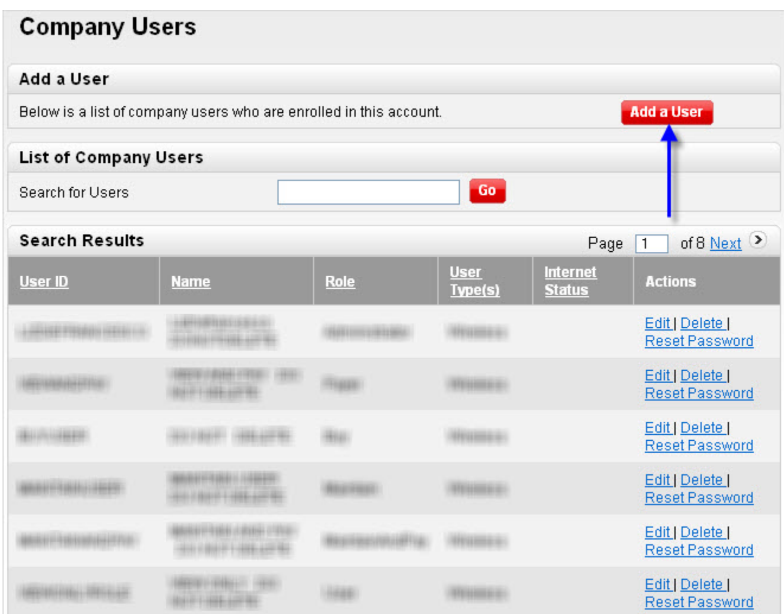
1. Click on the **Settings** dropdown.



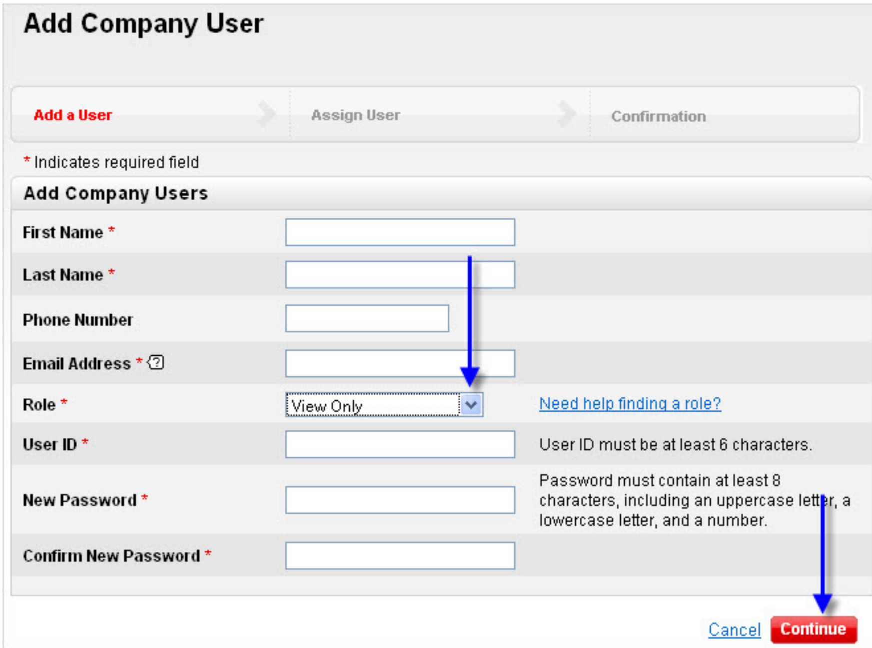
2. Go to the **Company Users** page.



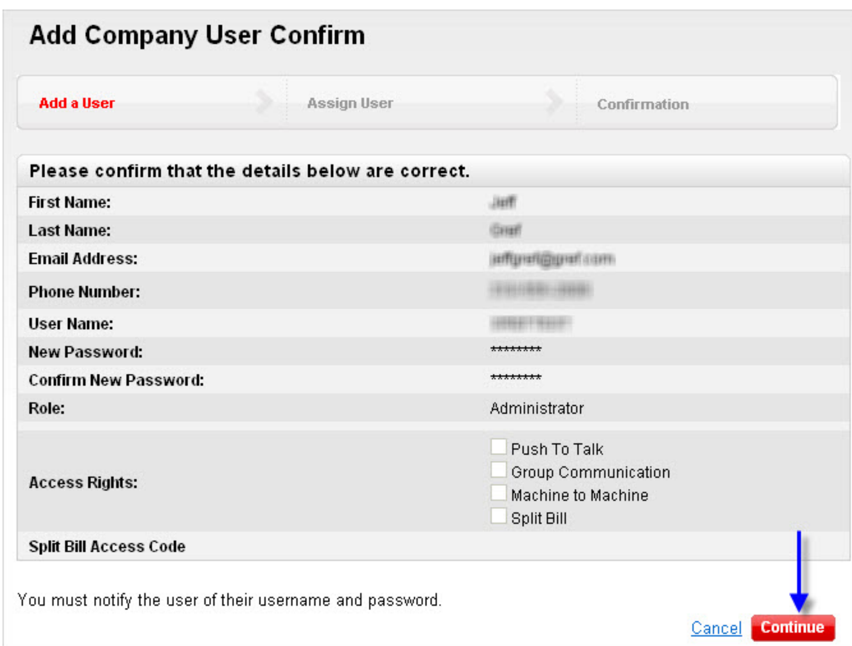
3. Click on the **Add a User** button on the upper right hand side of the page.



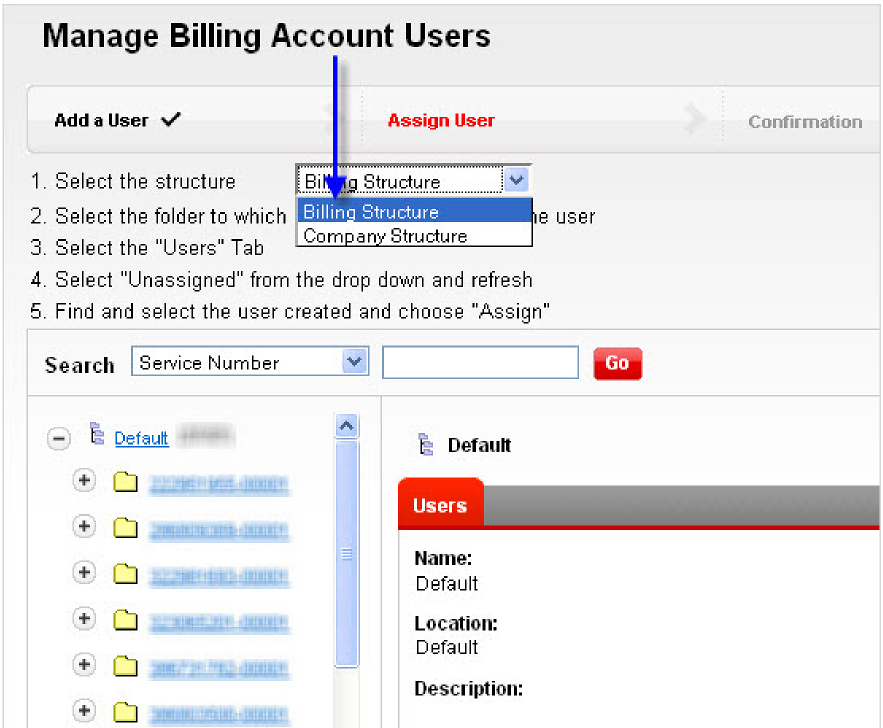
4. Enter the new user's information. Select a user role from the **Role** dropdown, and click **Continue**.



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



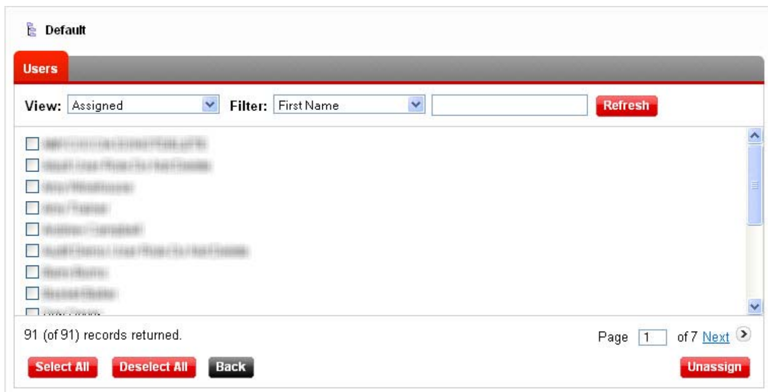
6. Click on the **Structure** dropdown and select **Billing Structure**.



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

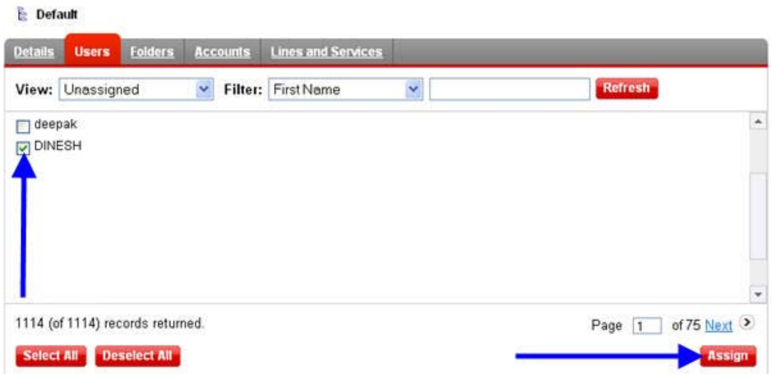
8. Click on the **Users** sub-tab in the right hand pane.

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



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

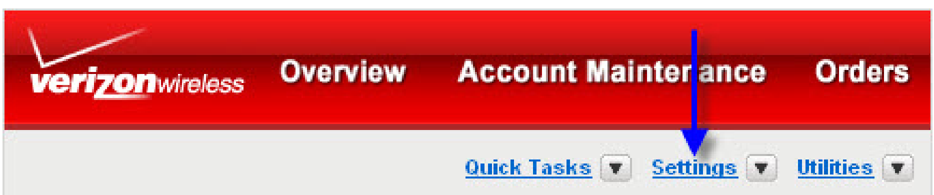
11. Check the box next to the new user's name and click the **Assign** button.



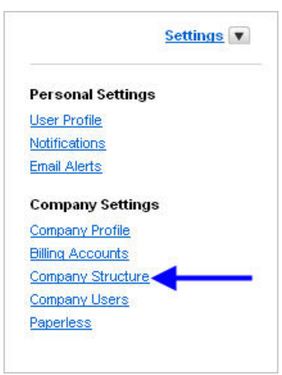
You have now successfully added a new user. Repeat steps 1-11 for all new users you add to the account.

Multiple Administrators: Standard Setup

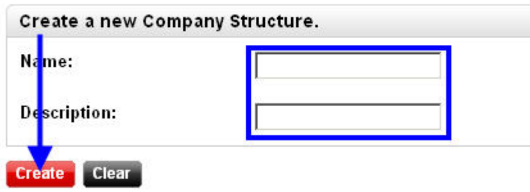
1. Click on the **Settings** dropdown.



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

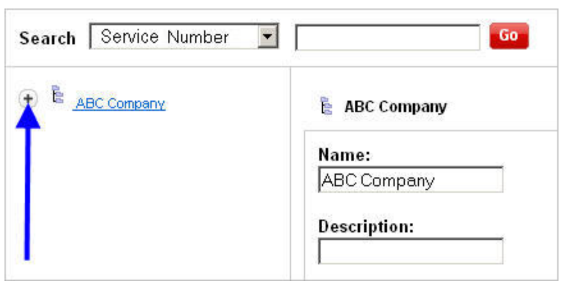


3. Enter the name and description of the company structure, and click **Create**. You have successfully created a company structure.



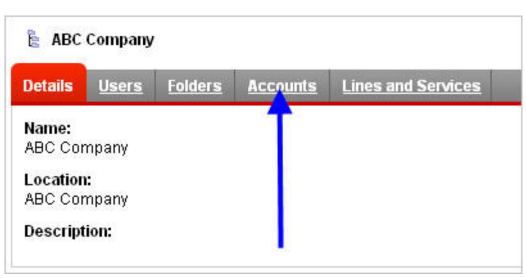
Note: Refer to the How to Use Guide: Understanding a Company Structure for detailed information on company structure maintenance. The structure name can be up to 30 characters; the description can be up to 50.

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

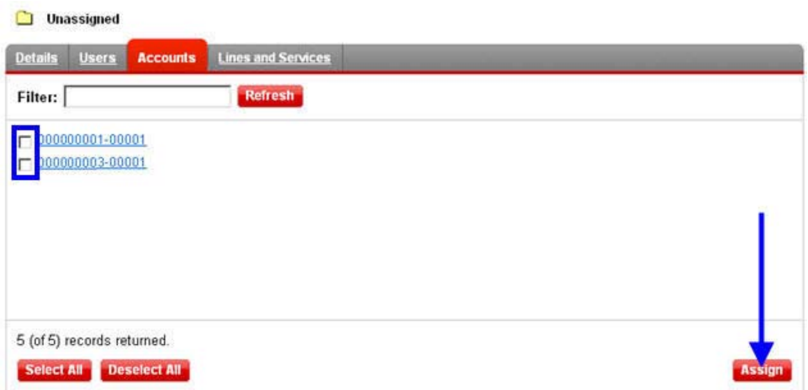


5. Click on the **Unassigned** folder.

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

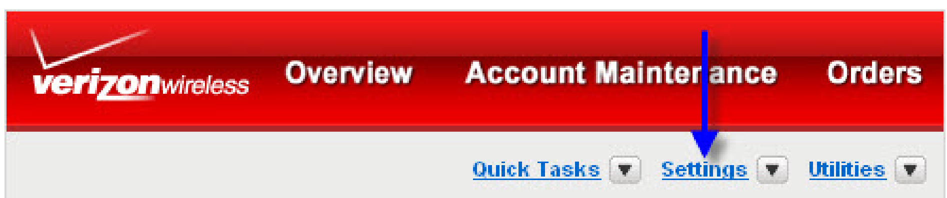


7. The account numbers will now appear. Check the boxes next to the account(s) you want to assign, and click **Assign**.

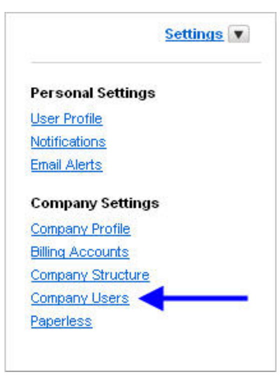


You have now successfully assigned account(s) to the new company structure. The next step is to assign an administrator to the structure.

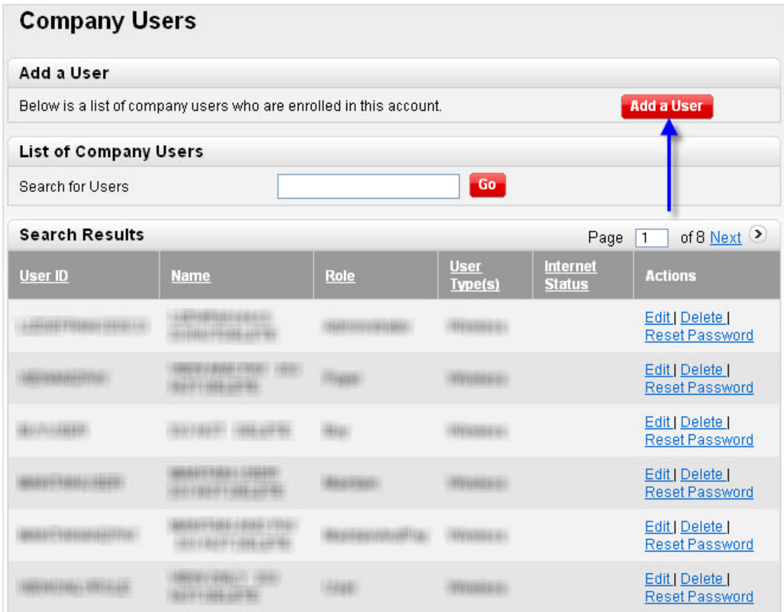
8. Click on the **Settings** dropdown.



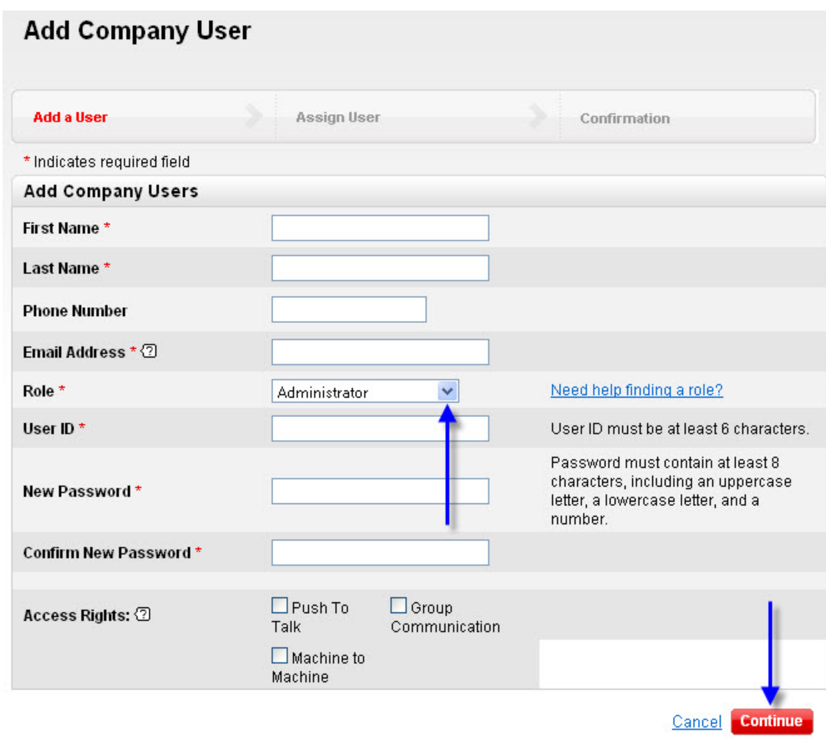
9. Go to the **Company Users** page.



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

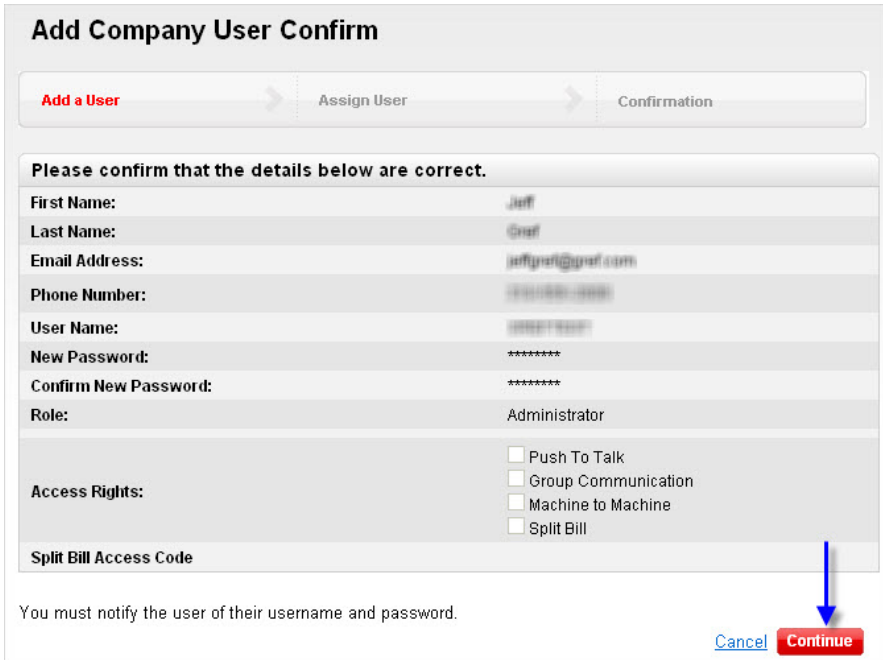


11. Enter the new user's information. Under the **Role** dropdown, select **Administrator** and click **Submit**.



12. You will be presented with a summary of the information you entered.

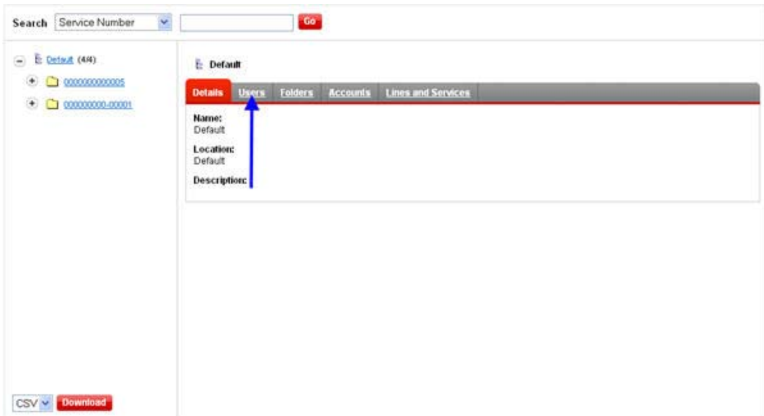
    a. Confirm the accuracy of the information and click **Continue**.



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

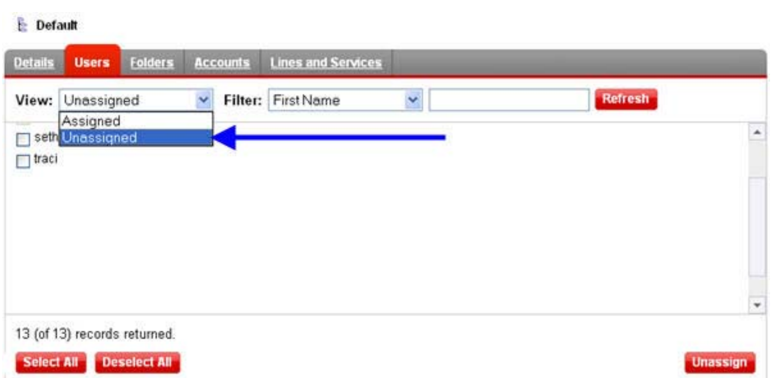
Note: You have now successfully added an administrator; however, the next step is to assign billing accounts.

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

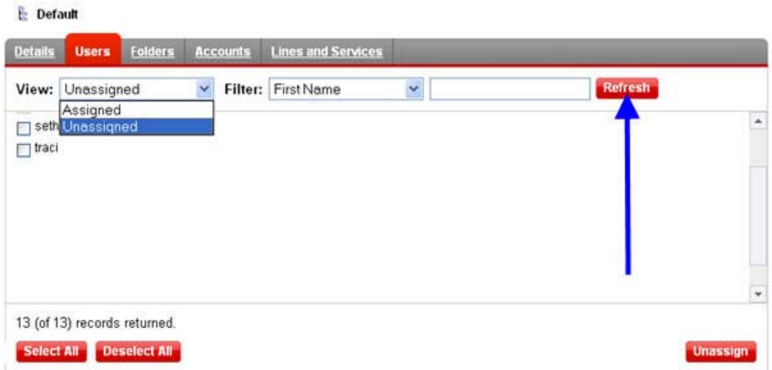


14. The page defaults to show the users who are currently assigned to the billing account.

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.