USER TOOLS USER GUIDE

Admin Dashboard

Accessing the Admin Dashboard

1. To access the Admin Dashboard, go to: **http://www.conferencegroup.com/Dashboard**.
2. Log in using the email address and password provided for the admin dashboard, or if a returning customer dashboard client, use an existing email address and password.
3. Once logged in, the Admin Controls tab will be visible, click the tab to be taken to the **basic view** of the Admin Dashboard.

Whether a returning dashboard user or a new admin, accessing the dashboard is easy, call us today to setup your account.

Questions? We are here 24/7 to help.
Call (877) 709-8255
Email csr@conferencegroup.com

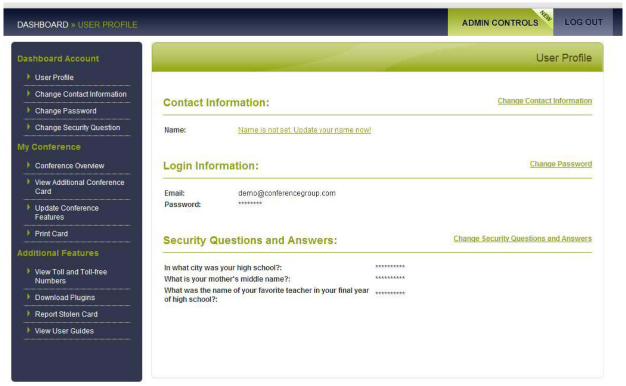

Figure A. Customer Dashboard w/Admin Controls Tab

Viewing Your Conferences (Basic View)

In the **Basic View** you will see all conferences available to the admin user in a visual "grid display", making it easy to identify conferences.

Search/Filter Conference

There are several ways that you can search/filter or browse through all of your conferences.

- Click "Prev" or "Next" to browse through conferences
- Increase the amount of conferences shown per page by clicking the drop down menu for show items. (Basic view only)
- Type in the Search field to find a conference by Name, Telephone Number or Passcode.
- Filter by Sub-Account and Billing Code accounts.
- Conference Banners - A quick way to identify the service associated with that particular conference.

Res Reservationless TTalk TogetherTalk

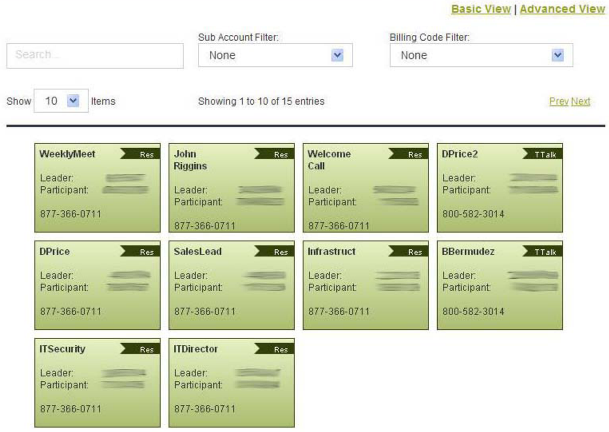

Figure B. Basic view

View/Edit Conference Details

Double Click any conference to view the Conference Details.

Edit Conference Information & Features

Edit the conference information, conference features such as Entry/Exit Tones, Name Record and Billing Code Prompt, or ADD web conferencing to the conference instantly.

1. **Double Click** conference to open the Conference Details.
2. Click "Edit".
3. Make changes/edits as needed.
4. Click "Update".

Change Passcodes

Note: Once you change the passcodes you CANNOT get your old passcodes back. Web conference(s) associated with this conference will also be updated with new passcodes.

1. **Double Click** conference to open the Conference Details
2. Click "Change Passcodes". (Note: Both the leader and participant codes will be changed for this conference)
3. The system will auto-generate new passcodes.
4. Print Cards or make a note of these new passcodes.

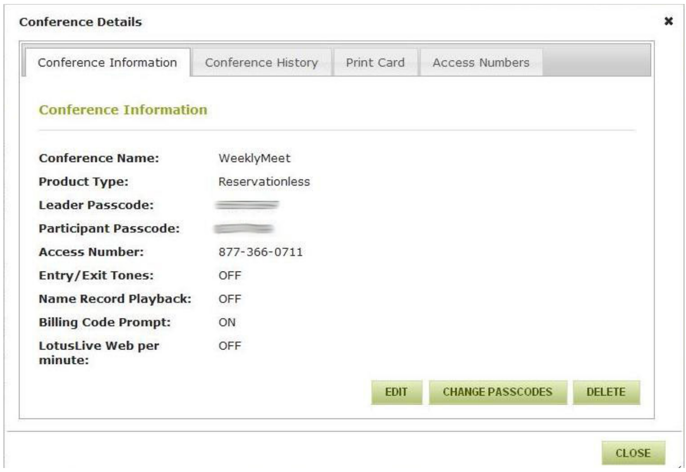

Figure C. Conference Information

Delete Conferences

This PERMANENTLY removes the conference from use.

1. **Double Click** conference to open the Conference Details
2. Click "Delete" .

Conference History

Via the Conference History tab you can access attendance reports (last six months), download recordings (recorded within the last 30 days) and add/change the billing code associate with the conference.

1. **Double Click** conference to open the Conference Details
2. Click the "Conference History" tab.

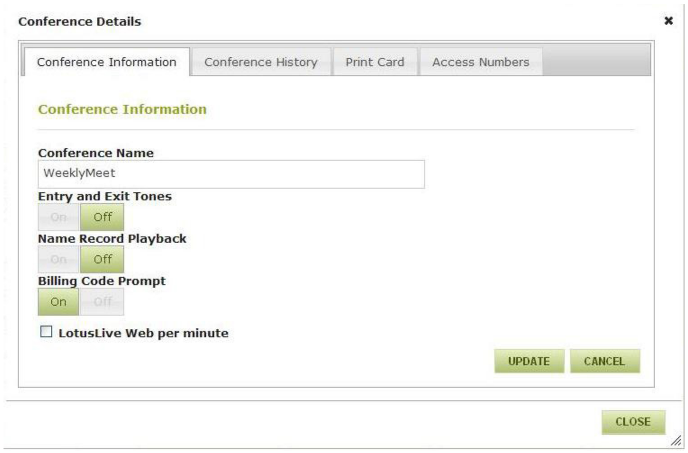

Figure D. Conference Features

Print Cards

Print a wallet size paper card on a local printer.

1. **Double Click** conference to open the Conference Details
2. Click the "Print Card" tab.
3. Click "Print" to print. This will launch your locally configured printer.

Access Numbers

Click the Access Numbers tab to access all of the international toll free numbers available for the conference selected.

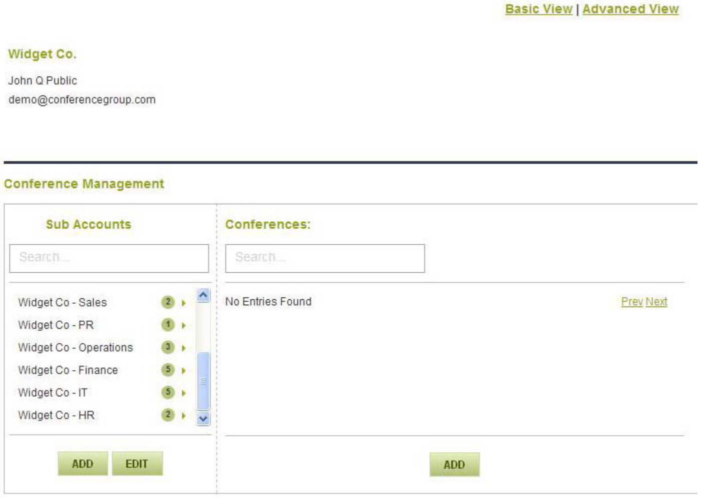

Figure E. Advanced View

Viewing Your Conferences (Advanced View)

In the **Advanced View** you will see all of the conferences available to the admin user in a "list display", this makes it easy to filter down by sub and billing accounts.

Create NEW Sub & Bill Code Accounts (Advanced View ONLY)

The advanced view will allow for creating new sub-accounts and billing code accounts. Since each account can only have one (1) Reservationless, one (1) TogetherTalk, and one (1) Minute Plan conference, creating new sub-accounts or billing codes may be necessary as your company grows.

1. Click “Add” on the appropriate level to add either a sub-account or billing code account.
2. Complete the form by entering the information for the New Sub or Billing Code Account.
3. Click “Add”.

Note: Once a conference is created, the email associated to that account will be notified of the passcodes and conference information.

Edit Sub & Bill Code Accounts Information (Advanced View ONLY)

The advanced view will allow for editing sub and billing code accounts information.

1. Highlight the account and click “edit” to make changes to that account.
   Note: The number on a sub-account indicates how many billing codes are under that account. Double click the account or click the arrow to view the billing codes under that account.
2. Edit the information as needed.
3. Click “Update”.

Figure F. Sub-Accounts

Figure D. Billing Codes