

# Customer Dashboard

## Accessing the Customer Dashboard

- To access the Customer Dashboard, go to:  
<http://www.conferencegroup.com/Dashboard>.
- If you already have an account, use the Log In section. Otherwise, click the **Register** button to register as a New User on the Customer Dashboard. **Figure A**.

## Register a New User

- To register click the “**Register**” button on the Customer Dashboard home page or go to:  
<http://www.conferencegroup.com/Dashboard/new-user.aspx>.
- You need to input your **Email Address** and your **Leader Passcode**.
- You can find your **Leader Passcode** on your conference card or welcome email provided by the Conference Group.
- Once you submit the form, you will receive an email containing verification instructions. Please follow the instructions to access your Customer Dashboard account.

**Note:**

- Please check your email’s spam folder if you do not receive an email within 5 minutes.
- If you are having difficulties registering, please contact us at (877)-716-8255

## Using the Customer Dashboard

After successfully logging into the Customer Dashboard, users can begin to use the dashboard by clicking the main menu on the left side.

## Dashboard Account

- Users can view and update their contact information, login information, and security questions and answers from the user profile page or using the menu on the left. **Figure B**.

## My Conference

- On the Conference Overview page, users can access their conference information along with conference history. In addition, user can download their recordings and add a Billing Code to appear on their invoice. **Figure C**.

The Customer Dashboard enables you to manage your Reservationless and Together Talk accounts. This User Guide describes the steps involved to use this tool.

**Questions? We are here 24/7 to help.**

**Call (877) 709-8255**

**Email [csr@conferencegroup.com](mailto:csr@conferencegroup.com)**

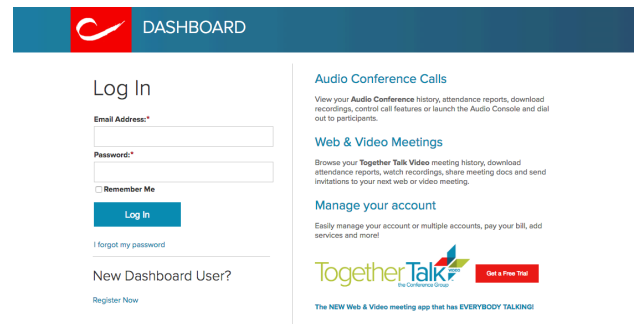


Figure A. Customer Dashboard Log In

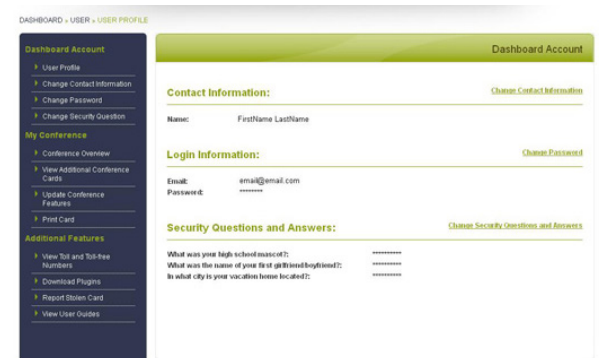


Figure B. Conference Overview

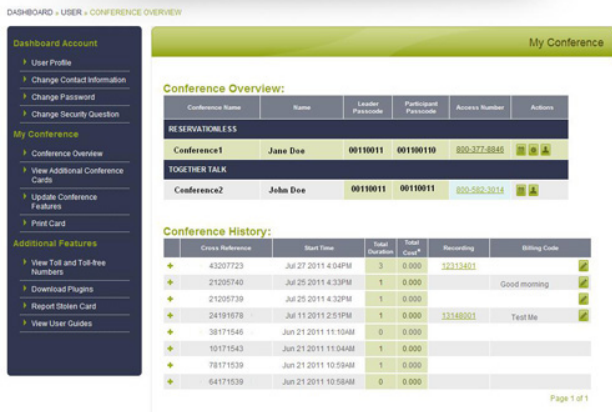


Figure C. Conference Overview

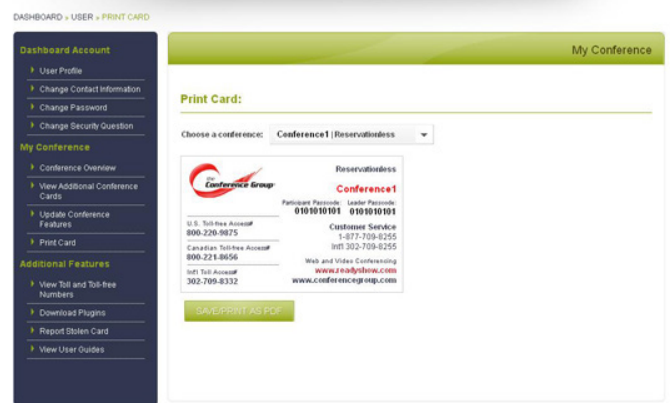


Figure F. Print Card

- Users are able to add additional conference cards by using View Additional Conference Cards page. Remember that the Leader Passcode must have the same email address as the registered Dashboard email address. **Figure D.**

- Finally, users are able to print their card information or save it as PDF file on Print Card page. **Figure F.**

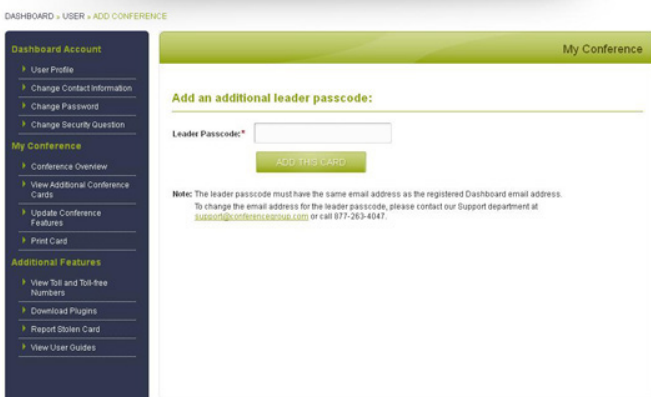


Figure D. Additional Cards

- Reservationless Users are able to request changes to the conference features on the Update Conference Features page. **Figure E.**

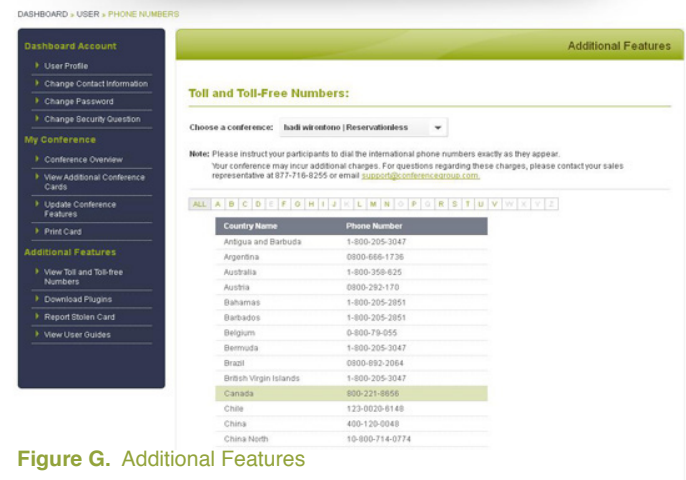




Figure G. Additional Features

## Additional Actions

 **Conference History** - Receive last six months of conference reports. By clicking the plus sign, you will receive call detail of the conference. If a recording is available for the call, you can stream or download by clicking the reference number. If the call has not been billed, you may enter a Billing code that will appear on the next invoice.

 **Conference Features** - Make changes to your current conference features. Making an edit to these features will change them for the conference selected only. (Only available for reservationless conference cards)

 **Print Card** - Print or save a PDF of the current conference card selected.

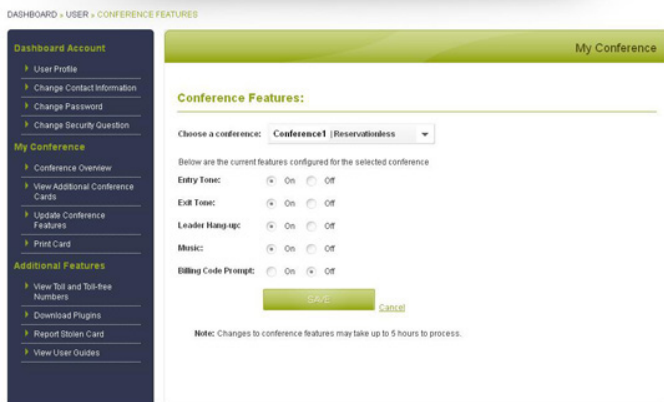


Figure E. Conference Features

## **Downloading Recordings**

To get access to your Reservationless recordings click Conference Overview in the My Conference section of the dashboard. Select the History icon under Actions to receive a list of your conference calls for the last six months. Find the conference with the recording you want to download. Right-click the recording name and click Save Target As. Choose where you would like to save the MP3 file and click OK.

## **Additional Features**

Users can view toll and toll-free numbers that are available for each conference by selecting View Toll and Toll-free Numbers link on the main menu. The highlighted Country Names and Phone Numbers are the U.S. Toll-free, Canadian Toll-free, and International Toll numbers. **Figure G.**