



CALLBRIDGE

*ADMINISTRATOR
QUICK-START GUIDE*

This quick-start guide is for Callbridge Administrators who have just set up their company account or have been assigned as a company admin.

Find out how to manage hosts, customize your account, update billing information and download reports.

If you find that you need more help, feel free to reach out to the Callbridge support team via the contact details listed below. Live chat is also available within your account at the bottom right of all pages.

Supported Operating Systems:

Windows 7, Windows 10, Mac OS X 10.8 and up, Ubuntu 12.04 and up, Fedora 21 and up, Debian 8 and up.

Minimum Browser Supported:

Google Chrome V58 and up
(ideally, the latest version)

Callbridge Support:

<https://support.callbridge.com>

support@callbridge.com

US/CA Toll Free: +1 888 523-6976

UK: +44 (0)33 0058 3797

International: +1 646 798-1688

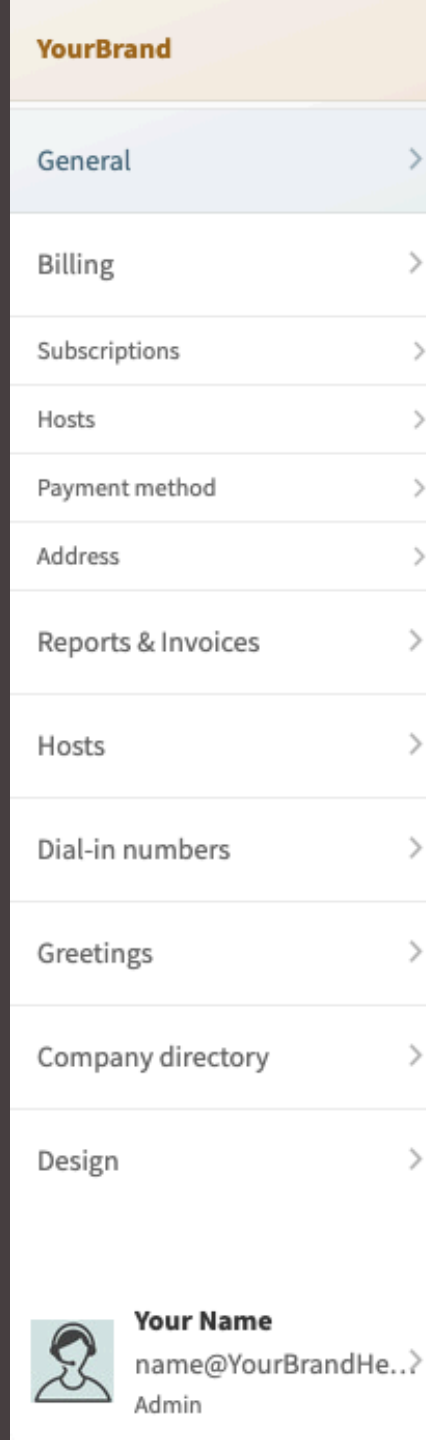
Sign up for a free trial:

<https://www.callbridge.com/>

HOW TO ACCESS ADMIN CONSOLE

1. Log into your Host account
2. Click on the Menu at the top right of the screen
3. Select 'Admin Console'

To go back to your general host account from the admin console, click on your name at the bottom left of the screen and select 'go to dashboard'.



GENERAL

Manage general company settings.

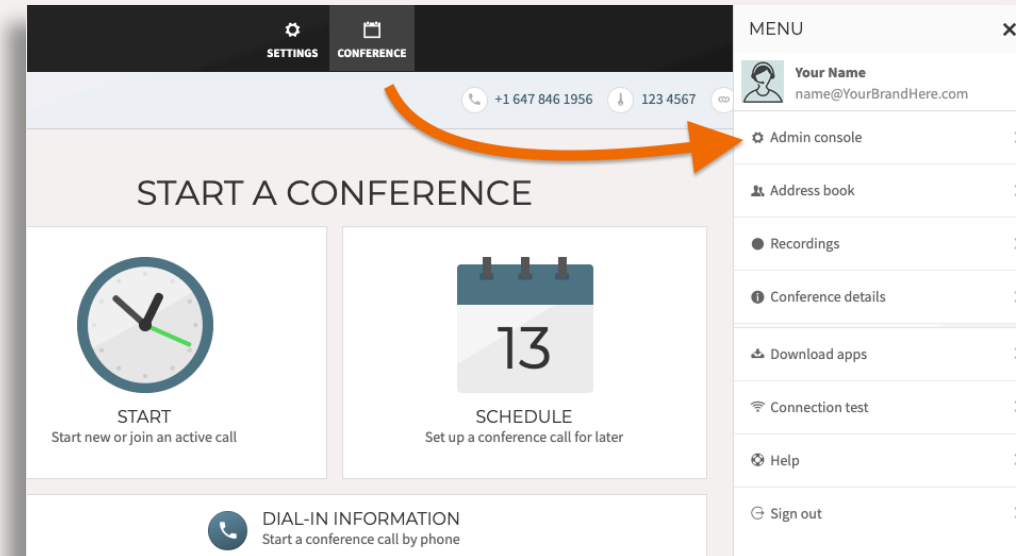
Company name

YourBrand

URL

YourBrandHere

SAVE



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COMPANY DIRECTORY

Upload a CSV of contacts to provide a directory for all hosts on your company. All contacts added to the company directory will be available in each host's address book. [Example File](#)



Drop CSV here
CSV format only

SELECT FILE

Provide a directory for all hosts in your company account.

1. Select 'Company directory'
2. Download the 'Example File'
3. Add all contact that you want to be available in every host address book
4. Click 'SELECT FILE' and upload this CSV file of your company directory

HOW TO UPLOAD COMPANY DIRECTORY

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MANAGING HOSTS

In the Hosts tab you have the following options to manage hosts on your account:

- ✓ Add new host account
- ✓ Edit host name, email or role
- ✓ Delete host account
- ✓ Resend Invitation
- ✓ Search and find host details

YourBrand

HOSTS

Manage the hosts with access to your company.

[ADD HOST](#) [UPLOAD CSV](#)

17 of 17 hosts

ID	NAME	EMAIL	ACCESS CODE	PIN	ROLE	EDIT	DELETE
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	All <input type="text"/>		
407996	Employee	example@...	9655362	1122985	Host	Edit	Delete
431391	Sara Jones	sara@Your...	2772338	1765015	Admin	Edit	Delete
432093	First Name...	yourbrand...	7230105	3786635	Host	Edit	Delete
441853	Anton	Anton@iot...	3194839	2080959	Host	Edit	Delete
441854	Sarah	sarah@iot...	5258107	9270854	Host	Edit	Delete
442046	DoraAdmi...	1drip@dor...	4917107	6384007	Admin	Edit	Delete
442056	SarahDrip	1drip@sar...	5738754	6069851	Host	Edit	Delete
442061	DoraAdmi...	2drip@dor...	2533313	3590000	Admin	Edit	Delete
444050	3Drip	3Drip@dor...	6469525	9854889	Admin	Edit	Delete
444201	Claudia	claudia@i...	5045241	1390336	Host	Edit	Delete

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ADD HOST

Name

Name

Email

Email

☐ Admin

Primary dial-in numbers

Type a location or phone number

Country Code

e.g. United States of America - US

Locale

e.g. en-US

Time Zone

Select...

SAVE

BACK

ADD HOST: Enter all contact and location details for the new account and click 'Save'.

***Primary dial-in numbers:** choose a number local to your host. Multiple numbers can be chosen, for example a toll and toll-free dial-in can be selected as primary numbers.*

***Locale:** essentially the language you want to select for this host*

This will generate a Welcome Email to the host which will include their account details, a link to set their password and general information about how to get started.

DELETE: Click to remove a host account.

**To delete an Admin account, first edit the account and remove the admin role.*

ADDING HOSTS

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DIAL-IN NUMBERS

REQUEST DIAL-IN NUMBER

NUMBER	LOCALE	COUNTRY	LOCATION	PLANS & ADD-...	GROUP
			Calgary		
+1 587 287 4...	en-US	CA	Calgary	Free Trial Plan	

Previous

REQUEST DIAL-IN NUMBER & GREETING

Request a custom dial-in number & greeting for your company's conference calls. We will contact you with available numbers and our professional voice talent will record your greeting. Additional charges and/or upgrades may be required.

Country

e.g. United States of America - US

Greeting

Welcome to the YourBrand conferencing center

...Please enter your access code or PIN followed by the # sign.

0 / 200 characters

Notes (optional)

Calle rhymes with "rally" and Lauterbach is pronounced "LAWterbock"

You may provide guidelines for any name or word pronunciations, or any other details for your greeting.

SEND REQUEST

BACK

On the Dial-In Numbers tab, you will find any 'custom' numbers that are assigned specifically to your organization.

Click **REQUEST DIAL-IN NUMBER** to order a new custom number and greeting.

Note that only one greeting can be applied per 'locale' (language).

Note that there is a monthly fee for custom numbers. A customer service representative will be in touch to confirm any additional charges and finalize the custom number on your account.

CUSTOMIZATION: DIAL-IN NUMBERS & GREETING

CUSTOMIZATION: LOGO & ICON

Under 'Design' click 'SELECT FILE' to upload your company logo and/or icon.

- ✓ For best results we recommend that your LOGO file is 96 x 600 pixels or a minimum of 96 x 96 pixels.
- ✓ The ICON file must be square and at least 96 x 96 pixels.
- ✓ Our system will accept the following file formats: JPG, JPEG, PNG, or GIF

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DESIGN

Customize the look and feel of your company dashboard, online meeting room, and email invitations with these design options.

COMPANY LOGO

YOUR LOGO




Drop logo here


JPG, PNG, or GIF

Minimum size 96 x 96px

SELECT FILE

COMPANY ICON





Drop icon here

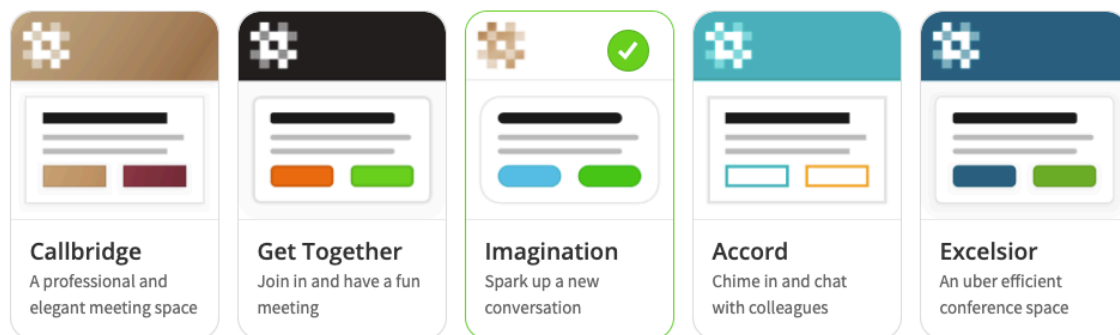
JPG, PNG, or GIF

Minimum size 96 x 96px (square)

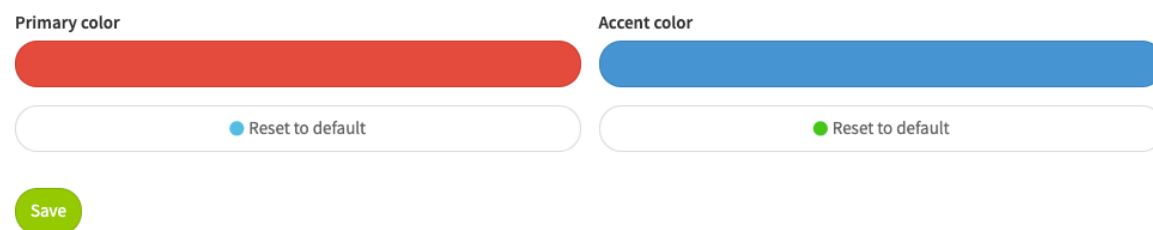
SELECT FILE

DELETE

Theme



Colors



Change the primary and accent colors of your meeting room & account dashboard.

1. Choose your preferred theme
2. Click anywhere on each color and select the shade; or type in the HEX code
3. Click 'SAVE' to update your changes.

The new color scheme will be reflected immediately. There is no limit on how often you may change this.

CUSTOMIZATION: COLORS & THEME

BILLING

- ✓ Update & change your subscriptions
- ✓ Set how many host accounts will be available on your Callbridge subscription.
- ✓ Input or change payment information
- ✓ Update your Billing Address

Note: if the host limit change results in a change in pricing, you will be asked to confirm this prior to the change going into effect.

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- Payment >
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HOSTS

The number of hosts available to your company.

Number of hosts

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SAVE HOSTS LIMIT

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UPDATE CREDIT CARD

No credit card information on file.

CREDIT CARD

Card numberMM / YY CVC

Name on card

Address

City

Country

UPDATE

I authorise Callbridge to send instructions to the financial institution that issued my card to take payments from my card account in accordance with the terms of my agreement with you.

Payment Method: update and change your credit card details.

Address: enter your billing address exactly as you need it to appear on the invoice.

PAYMENT METHOD & BILLING ADDRESS

REPORTS

View, search & export CSV files of:

- ✓ Invoices
- ✓ Meeting Summaries
- ✓ Usage Charges
- ✓ Call Detail Records
- ✓ Transaction History

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REPORTS & INVOICES

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Call Detail Records	>
Transaction History	>
Exported CSV's	>



** After clicking 'Export CSV',
just go to 'Exported CSV's' where you
will be able to download the CSV file/s.*