my.plan.com

Quick start guide

plan.com

contents.

who we are.

transparent, honest, trustworthy
– yours for the long term

Powered by O2, plan.com is one of the UK's leading business communication providers.

Working together with your comms partner, we can create a tailored package designed to suit you. Whatever the size of your business – whether it's just you or a whole team – we can meet any or all of your communication requirements. It's as simple as that.

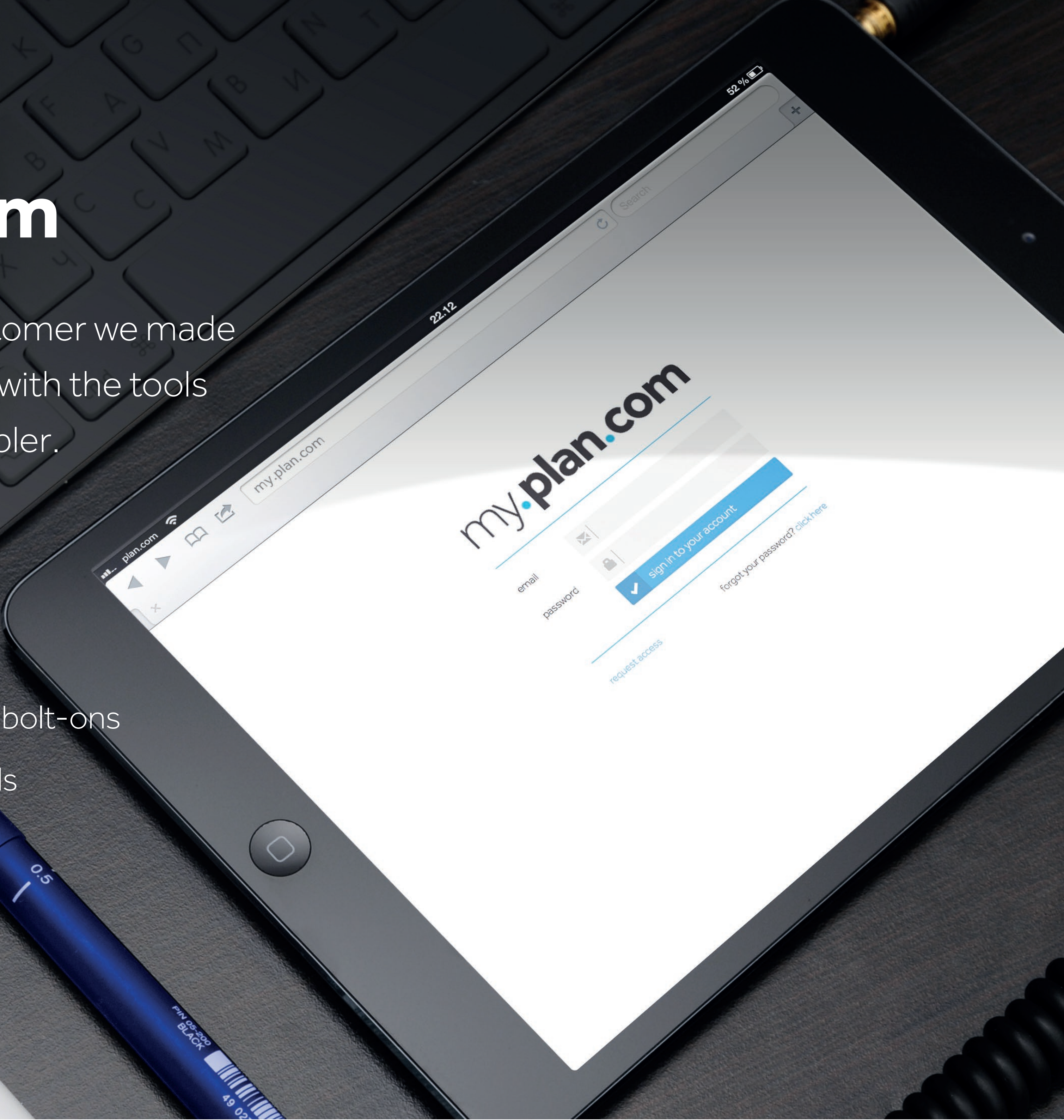
We're plan.com, let us tell you more...

my.plan.com

As a valued plan.com customer we made a promise to support you with the tools you need to make life simpler.

What can you expect?

- Balance & billings
- User activity
- Manage devices & request bolt-ons
- Update your account details



getting started.

It's free, simple and it works as hard as you do.

- visit **my.plan.com/login**
- Hit the 'request access' button then enter your email address and contact number
- We will then send a verification link to your email address and you're ready to go!

the dashboard.

main menu

The main menu allows you to see the dashboard, services, billing and users. The cog on the right is where you can change your password, refresh the portal, request third-party access for your partner, report a problem or sign yourself out.

user stats

The stats bar is a quick reference guide to some of the key areas of your account. The totals display the number of devices in your contract, which of these are active and time left on your contract or the billing cycle.

billing history graphs

Tied to the current charges pane, these show you all your previous months charges for the section you wish to view. This defaults to your last monthly bill.

balance & billing

The balance and billing section displays your unbilled balance for the current month. This will include the monthly tariff cost as well as any out of bundle or roaming charges. The due date for payment and your previous bill are also displayed here.

options

You can choose to contact us, change the bank account used for your direct debit, view or add addresses and do the same for your contacts.

latest offers

Here you'll find the latest offers from **plan.com**

current charges

This section provides you with a breakdown of all of your current charges. Clicking a heading will display these in the graph opposite for the previous months.

graphs and options.

Here's a few screenshots of the graphs linked from the dashboard.

When you load your dashboard you will see the graph displaying your previous months' bills.

The graph will change and the menu item will highlight when you choose an option from the current charges.

This sceenshot is viewing their roaming voice data for the previous months.

view addresses.

search

To search your addresses type in this box, there is no need to submit your search, the filter will auto-update your list as you type.

addresses

Here you will find a scrolling list of all the addresses linked to your account.

back to dashboard

This takes you back to your dashboard.

options

Here you have the option to edit the details of an address or remove them from your list entirely.

add address

To add a new address to your account, click the add button. (The popup is displayed below.)

the popup window

The popup window which is displayed when clicking the add address option.

view contacts.

search

To search your contacts type in this box, there is no need to submit your search, the filter will auto-update your list as you type.

contacts

Here you will find a scrolling list of all the contacts linked to your account.

back to dashboard

This takes you back to your dashboard.

options

Here you have the option to edit the details of a contact or remove them from your list entirely.

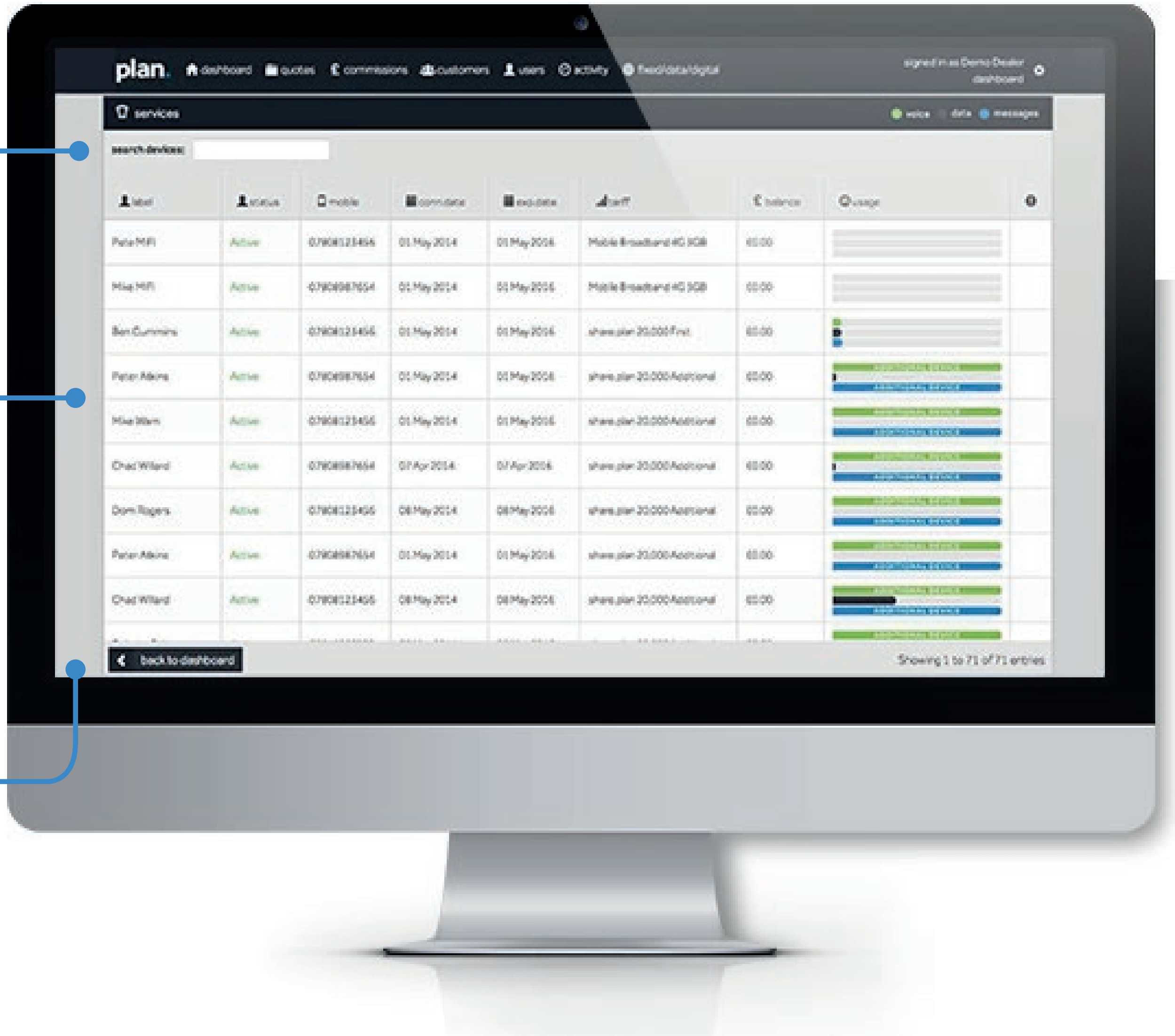
add contact

To add a new contact to your account, click the add button. (The popup is displayed below.)

the popup window

The popup window which is displayed when clicking the add contact option.

services.



search

To search your services type in this box, there is no need to submit your search, the filter will auto-update your list as you type.

service list

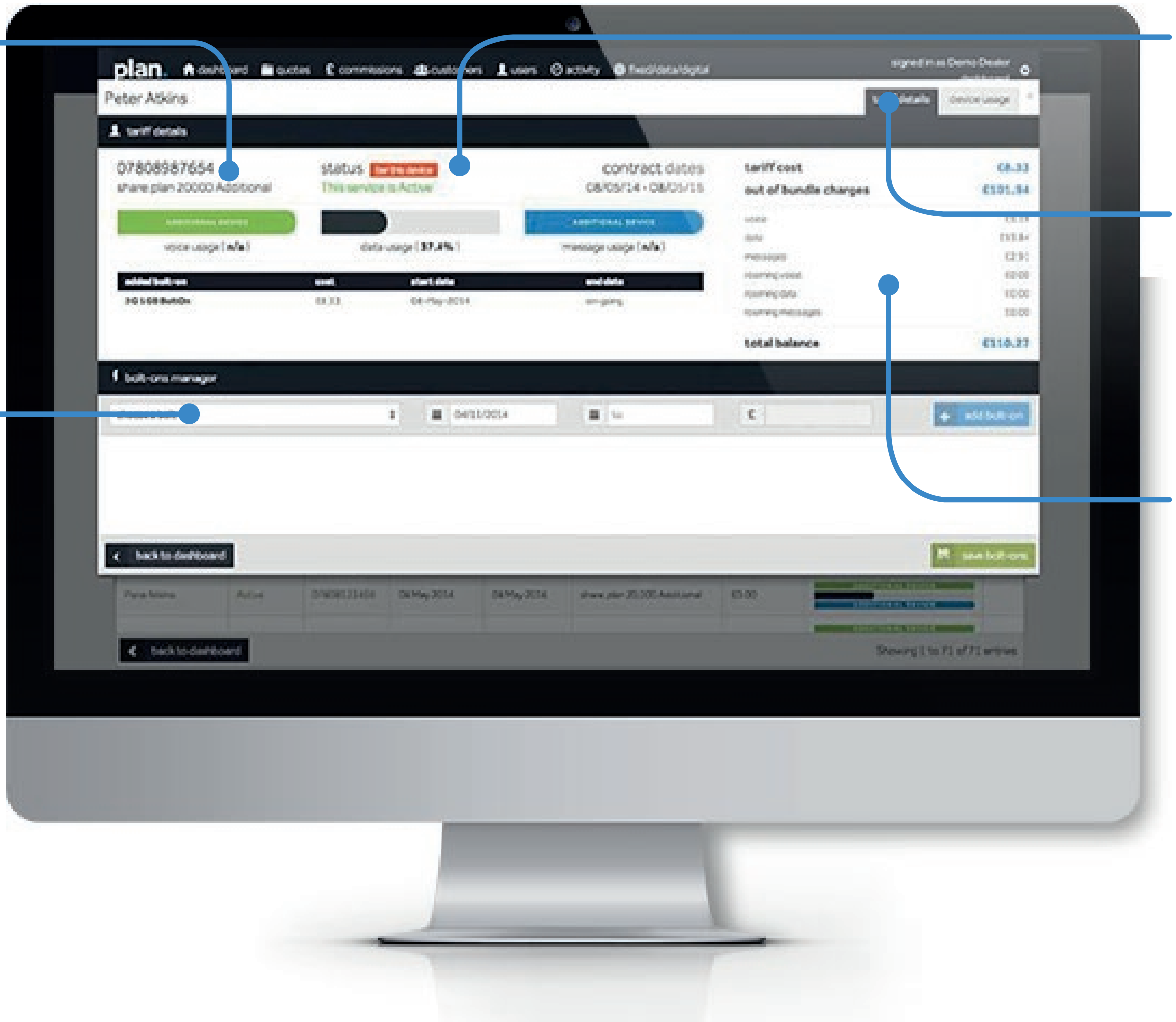
This is a list of all the services on the account. Here you will see all the relevant information including whether the device is active, the number, contract dates, balance and usage. Clicking a user will take you through to a more detailed breakdown of their device.

back to dashboard

This takes you back to your dashboard.

tariff details.

Click on a device to see a detailed breakdown including bolt-ons, tariff details and device usage.



tariff details

The core details for the tariff are displayed here – the device number, the selected plan, whether the device is currently active or barred as well as the contract dates, usage charts and current bolt-ons.

bolt-on manager

In this section you can request bolt-ons to be added to the device. Select the bolt-on from the menu, enter the start and end date (if end date is left blank the bolt-on will run through to the end of contract) and click "add bolt-on". Once all of the bolt-ons have been added, simply click "save bolt-ons". This will put the bolt-ons in a queue to be added. Once it is processed, the bolton will appear in the list in section 1.

status

You have the option here to bar or activate the device.

tab options

Here you can swap between the tariff details and tariff usage or close the window.

monthly breakdown

The current charges associated with the device are broken out in a simple to understand format ending with the total owed to date.

device usage.

filter

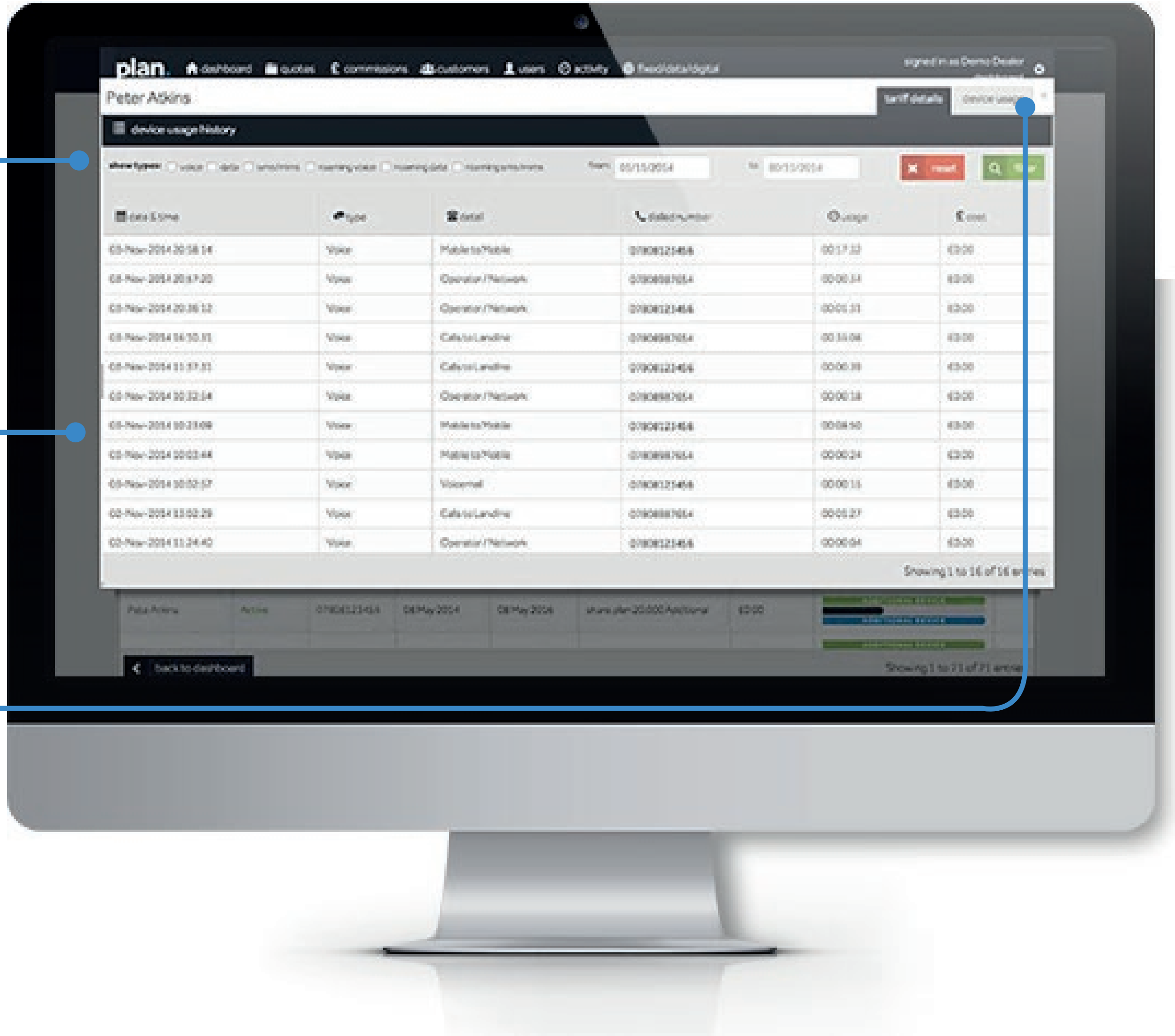
You have full control over what you want to see with our in depth filter. Simply choose your options before clicking filter. To go back to the full breakdown, click reset.

device usage

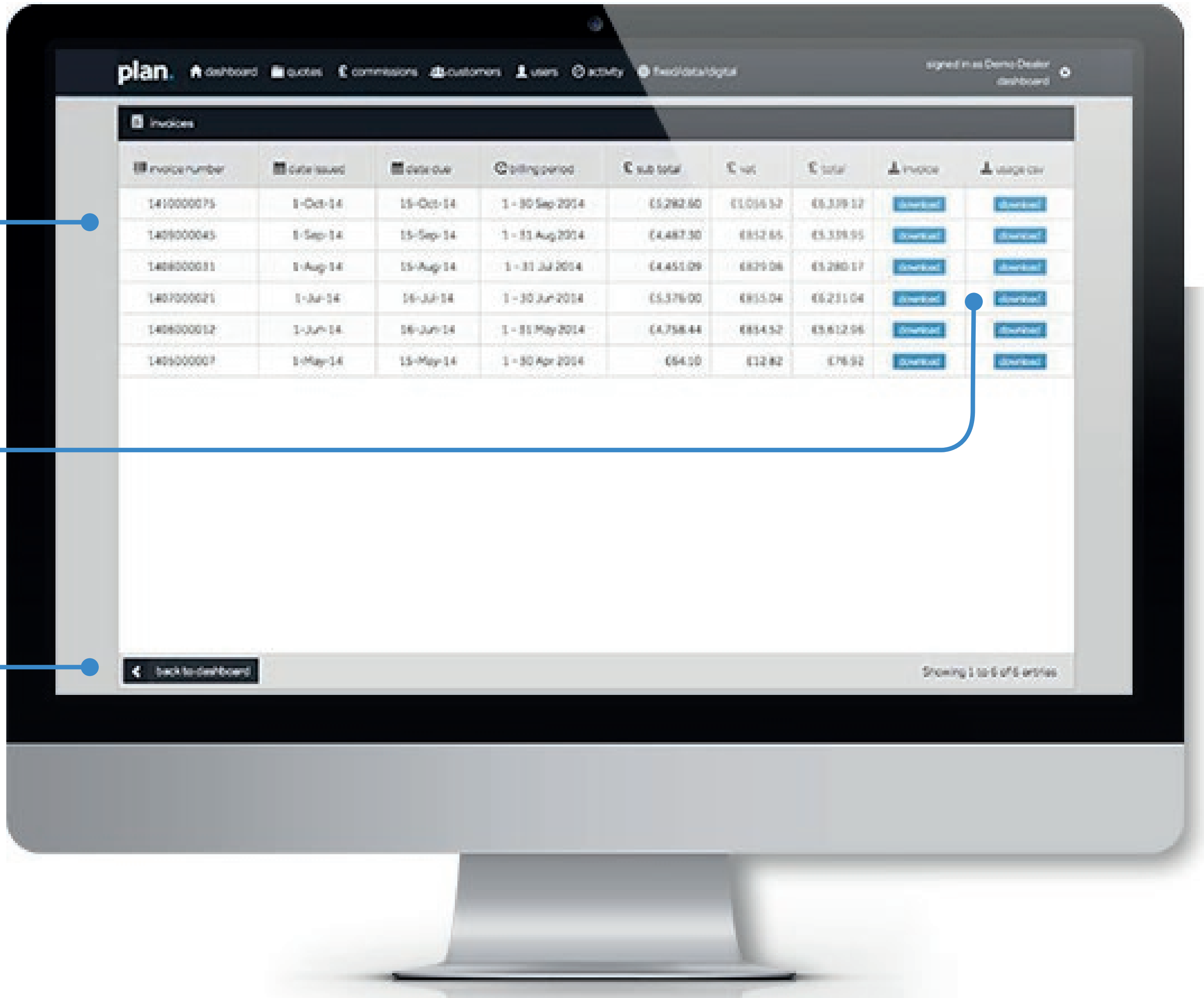
All of the historic device history is stored here broken down into time, type, detail, number, usage and its cost. The information displayed here goes back to the beginning of the devices contract.

tab options

Swap between the tariff details and tariff usage or close the window.



billing.



invoice list

All previous invoices for the account are displayed here, you can click the grey heading to sort the list by that column.

options

Download your invoice in either PDF or CSV format.

back to dashboard

This takes you back to your dashboard.

view users.

Keep your user details up to date, so you receive the information you need, where you need it.

search

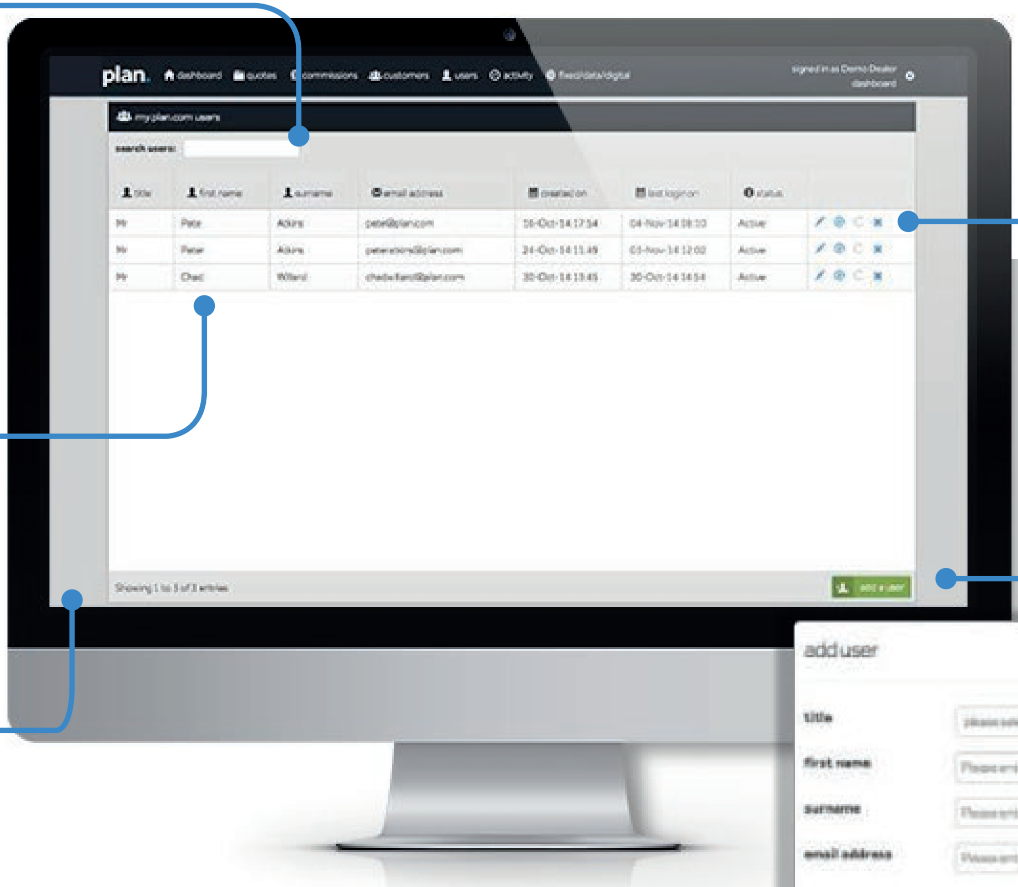
If you have a large user list, you can search through them by typing in this box, there is no need to submit your search, the filter will auto update your list as you type.

user list

All the users associated with this account are listed here.

back to dashboard

This takes you back to your dashboard.



options

update the user details, reset their password or delete them from your account.

add user

To add a new user to your account click the add button. (The popup is displayed below.)

the popup window

The popup window which is displayed when clicking the add user option.

questions?

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