

Quick Start Guide

X0 IP Flex, IP Flex with VPN, SIP Service Account Codes

For Group Administrators

Account Codes allow a group administrator to restrict calls to authorized users within a group, and track calls made outside the location by prompting users for a code.



About This Feature

The feature can be helpful in deterring fraud because it prevents unauthorized users from making calls at the company's expense. Account codes can also be useful in tracking calls billed to clients (e.g., law offices).

- With verified account codes, calls are not connected unless the caller enters a valid code
- With non-verified account codes, the entered account code is entered but not validated, and calls will be connected. For example, if there are 4 digits required in a non-verified account code, any 4 digits entered will be accepted, and the call will be completed

Emergency 911, extension dialing, and repair calls to 611 are never prompted for account codes.

Prerequisites

To use this feature, you must:

- Be a designated group administrator with access to Online Feature Management
- Request the Account Codes feature when you order services, or contact XO Customer Care at 800.421.3872 to order Account Codes at your service location

Although verified account codes are a billable feature, there is no additional charge for non-verified account codes, although they must be ordered (at no cost).

How Account Codes Work

XO Customer Care assigns account codes when you order XO VoIP Services, or you can order them later by calling Customer Care at 800.421.3872. The group administrator configures the Account Codes service via Online Feature Management. When configuring the service, the group administrator can:

- · Activate the service by selecting verified or non-verified account codes
- Select the number of digits (between 2 and 14) of the account code
- Configure valid account codes (and optional descriptions)
- · Select which users in the group are required to use Account Codes

The Account Code service applies to all local, long distance (domestic and international) calls made for an assigned telephone line.

How To Access Account Codes

OFM Home > Account Codes

Find a telephone number or location, and manage its options & services. Telephone Number Location	6-
Enter a telephone number Find Online Feature	Management
M Home > Account Codes	XOLINX FLEX DEMO 1 Fiex I
D Account Codes	
637 SUMMIT AVE , PLANO , Texas	Manage This Location
sing account codes enables the tracking of calls made outside the location by prompting users for a code. In non-verified mode, the ntered code is not validated. If verified codes are used, calls are not connected unless a valid code is entered.	Recent Transactions
	▶ Schedules
Account Code Wizard	 Schedules Edit Profile
Account Code Wizard	 Schedules Edit Profile Configurable Calling Line ID
Account Code Wizard Account codes enable the tracking of calls made outside the group by prompting users for an account code. However, codes are not validated. The account codes you define are presented to the user in a read-only screen on their CommPilot Portal.	Schedules Edit Profile Configurable Calling Line ID Manage Telephone Number
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A The Account Codes Wizard walks you through the set up of new verified or non-verified account codes, step by step. Choose the Account Code Wizard and see the next page for instructions.

B To view and edit account codes, choose View/Update Account Codes.

Choose Upload Account Code List when you want to upload a new list using a CSV file

Choose Add/Remove Telephone Numbers when you want to add or remove telephone numbers associated with an account code.

Figure 1: Account Codes Main Screen

How to Use the Account Codes Wizard

Easily set up new verified or non-verified account codes:

		Select verified or unverified.
XC Business Center		T
		Then, select Continue.
My Account Billing Network Management My Services Orders Support		
OFM Home Star Feature Commands Glossary		
Find a telephone number or location, and manage its options & services.		
Telephone Number Location	6	
Enter a telephone number Find Online Feature	Management	
Example: "2142345678"	Thanagornorit	
<u>OFM Home</u> > <u>Account Codes</u> > Account Codes Wizard (Step 1)	XOLINX FLEX DEMO 1 Flex I	
Account Code Wizard		
2637 SUMMIT AVE , PLANO , Texas	Manage This Location	
Using account codes enables the tracking of calls made outside the location by prompting users for a code. In non-verified mode, the entered code is not validated if verified codes are used, calls are not connected unless a valid code is entered	▶ Recent Transactions	
	▶ Schedules	
Account Code Wizard	► Edit Profile	
What would you like to do?	Configurable Calling Line ID	
▼ Add New Account Codes	 Manage Telephone Numbers 	
Step 1: Choose Account Code Type	▶ Departments	
O Verified	Automatic Call Routing	
© Non-verified	Hunt Groups	
	Incoming Call Routing	
Continue	Auto Attendant	
	Call Pickup	
View/edit Account Codes	Account Codes	
Upload Account Code List Add/computer Telephone Numbers	► Call Center	

Figure 2: Account Codes Wizard-Step 1

C Business Center	Back, <u>Contact Us</u> <u>Help</u>
Ay Account Billing Network Management My Services Orders Support	
OFM Home Star Feature Commands Glossary	
Find a telephone number or location, and manage its options & services. Telephone Number Location Enter a telephone number Enter a telephone number Example: "2142345075" Online Feature	e Managem
EM Home > Account Codes > Account Codes Wizard (Step 1)	XOLINX FLEX DEMC
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Account Code Wizard 2637 SUMMIT AVE , PLANO , Texas Using account codes enables the tracking of calls made outside the location by prompting users for a code. In non-verified mode, the entered code is not validated. If verified codes are used, calls are not connected unless a valid code is entered. Account Code Wizard What would you like to do? Add New Account Codes Step 1: Choose Account Code Type Verified	Manage This Locat > Recent Transactions > Schedules > Edit Profile > Configurable Calling > Manage Telephone Numbers > Departments > Automatic Call Routi
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Account Code Wizard Using account codes enables the tracking of calls made outside the location by prompting users for a code. In non-verified mode, the entered code is not validated. If verified codes are used, calls are not connected unless a valid code is entered. Account Code Wizard What would you like to do? Add New Account Codes Step 1: Choose Account Code Type Verified On-verified On-verified Jon-verified	Manage This Locat > Recent Transactions > Schedules > Edit Profile > Configurable Calling > Manage Telephone Numbers > Departments > Automatic Call Routi > Hunt Groups > Anywhere Feature P. > Incoming Call Routi > Auto Attendant > Call Pickup > Call Pickup

B Select the number of digits for the codes (between 2 and 13).

Then, select Continue.

Figure 3: Account Codes Wizard-Step 2

How to Use the Account Codes Wizard

Easily set up new verified or non-verified account codes:

Account Code Wizard			Schedules Edit Profile
What would you like to a	10?		Configurable Calling Line ID
Configure a New Call Forwa	Configure a New Call Forward		
Step 1: Add New Acc	Step 1: Add New Account Codes: AccountCode		
Step 2: Select Numb	Step 2: Select Number of Digits: 4		
Step 3: Add/Remove	Telephone Numbers		+ Hunt Groups
Telephone numbers in bo	id are currently participating in Accou	nt Codes.	 Anywhere Feature Package
Phone Number	Restricted	Non-Restricted	 Incoming Call Routing Auto Attendant
(214) 291-7543	@ Restricted	C Non-Restricted	+ Call Pickup
(214) 291-7540	@ Restricted	C Non-Restricted	+ Account Codes
(214) 291-7542	@ Restricted	C Non-Restricted	Call Center
(214) 291-7671	@ Restricted	C Non-Restricted	
(214) 291-7669	@ Restricted	C Non-Restricted	- Help
(214) 291-7541	@ Restricted	C Non-Restricted	OP M Guick Start Guide Business Center Damo
(214) 291-7670	@ Restricted	C Non-Restricted	Contact Customer Care
(214) 291-7672	Restricted	C Non-Restricted	
(214) 291-7600	@ Restricted	C Non-Restricted	Additional Services
(214) 201-7673	C Restricted	R Non-Restricted	Other customers who have Elex services have purchased
Continue Tex	C Restricted	A hon-Restricted	Flex encloses have purchase these features:

Choose which telephone numbers will participate in account codes. Users of these telephone numbers must dial an account code before making an outgoing call.

There are some exceptions that are called out in the text area at the top of the screen.

Press Continue.

C

Figure 4: Account Codes Wizard-Step 3



Enter (or upload) new account codes and describe the code. A CSV file format must be used for the upload. The Excel file must be formatted so that the Account Code value matches the number of digits configured in the Number of Digits field.

Press Continue.

Editing Account Codes

Account codes can be edited for multiple elements:

- Deleted
- Add or remove numbers which are required to use the account code
- Change account code number/required number of digits. Changing the number of digits in an Account Code to a lesser number (e.g., from 4 digits to 3) will delete the existing Account Codes.

Select the element to edit to get to the appropriate Account Code Wizard screen. Follow the steps to complete the transaction.

