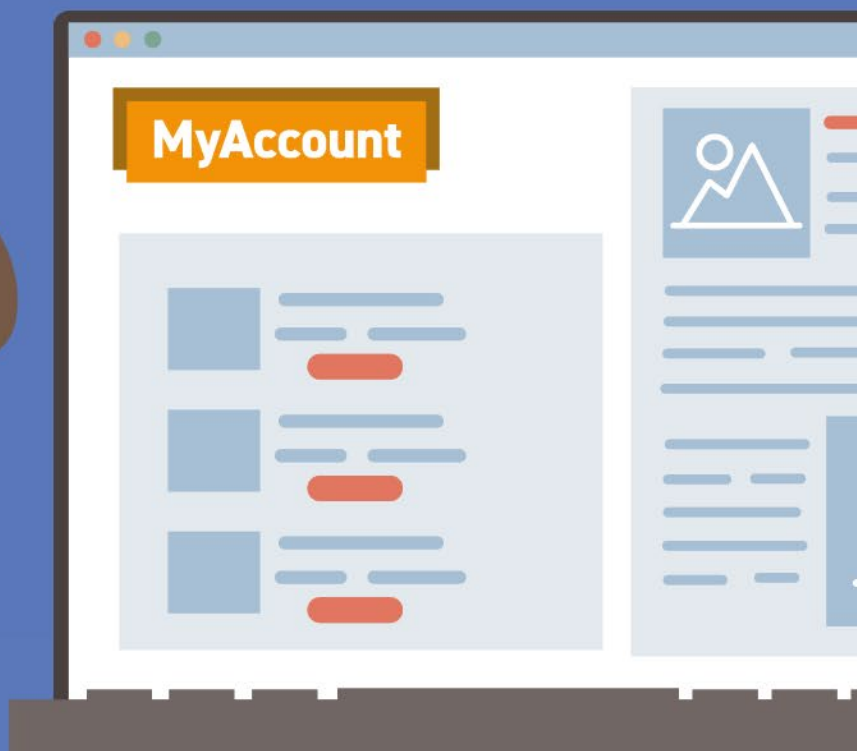




daisy.

COMMUNICATIONS

# Welcome to your new MyAccount



WELCOME TO

**MyAccount**

# Contents

Authentication .....	3
1.1. Logging In.....	3
1.2. Forgotten Password.....	3
Switching Accounts/Groups.....	4
1.3. Switch Accounts .....	4
1.4. Switch Groups.....	5
Bill Explorer .....	7
1.5. Bill Summary .....	7
1.6. Usage Analysis .....	8
1.7. Service Analysis .....	10
Account Management.....	12
1.8. Billing Address, Bill Type and Bill Email .....	12
1.9. Manage Direct Debit Details.....	12
1.10. Manage Account/Alert Contacts.....	14
Manage Users & Roles.....	17
1.11. Manage Users.....	17
1.12. Manage Roles.....	23
Asset Management.....	27
1.13. Search Assets .....	27
1.14. Update Tag/Username.....	27
1.15. Create Cost Centres .....	28
1.16. Assign Cost Centre.....	29
Mobile Management .....	31
1.17. Manage Bars .....	31
1.18. Request PAC/STAC/Switching Information.....	34
1.19. Worldwide Data Roaming.....	36
1.20. SIM Swap.....	37
1.21. Update Mobile Bill Limit .....	39
1.22. Block Lost or Stolen SIM .....	41

1.23. Unlock SIM .....	43
1.24. Order New SIM.....	45
1.25. Activate Dispatched SIM.....	47
1.26. Mobile Disconnection Requests.....	47
1.27. Bundle Alerts .....	48
1.28. Bill Limit Alerts.....	49
1.29. Check Mobile Change Status.....	51

# Authentication

## Logging In

The New MyAccount uses an SSO (Single Sign On) authentication system.

### Step 1

Go to the new MyAccount URL [myaccount.daisycomms.co.uk](https://myaccount.daisycomms.co.uk). If you are not logged in, you will be redirected to a URL like the below.

[https://sso.daisycomms.co.uk/auth/Account/Login?ReturnUrl=%2Fauth%2Fconnect%2Fauthorize%2Fcallback%3Fclient\\_id%3Daffinity-hub-prod-fe%26redirect\\_uri%3Dhttps%253A%252F%252Fmyaccount.daisycomms.co.uk%252Foauth\\_callback%26response\\_type%3Dcode%26scope%3Dopenid%2520profile%2520roles%2520email%2520HUB\\_FE\\_API%2520offline\\_access%26state%3D8ec81eb912714d1c944240840a4ee77f%26code\\_challenge%3DKvw5D0fdfdgNxzoQy10ejMx93y\\_4UrafqfdU%26code\\_challenge\\_method%3DS256%26response\\_mode%3Dquery](https://sso.daisycomms.co.uk/auth/Account/Login?ReturnUrl=%2Fauth%2Fconnect%2Fauthorize%2Fcallback%3Fclient_id%3Daffinity-hub-prod-fe%26redirect_uri%3Dhttps%253A%252F%252Fmyaccount.daisycomms.co.uk%252Foauth_callback%26response_type%3Dcode%26scope%3Dopenid%2520profile%2520roles%2520email%2520HUB_FE_API%2520offline_access%26state%3D8ec81eb912714d1c944240840a4ee77f%26code_challenge%3DKvw5D0fdfdgNxzoQy10ejMx93y_4UrafqfdU%26code_challenge_method%3DS256%26response_mode%3Dquery)

**Please do not change this URL otherwise you may not be redirected correctly.**

### Step 2

Enter login credentials, then click **Login**. You'll be redirected to Hub.

## Forgotten Password

### Step 1

Go to [myaccount.daisycomms.co.uk](https://myaccount.daisycomms.co.uk). You will be redirected to the login page.

### Step 2

Click **Forgot Your Password?**

### Step 3

Enter your email address and click **Submit**. A link will be sent to your email address allowing you to set a new password.

Note: If you do not receive an email, then you have not registered. Click the **Register Now** option to Register. You can only Register using the email address that is set as the billing email address on your account.

# Switching Accounts/Groups

If you have access to more than one account within the same group (organisation), you can “Switch” to a particular account by following the ‘Switch Accounts’ guide below. If you have access to more groups (organisations), then you can switch groups using the ‘Switch Groups’ guide further below.

## Switch Accounts

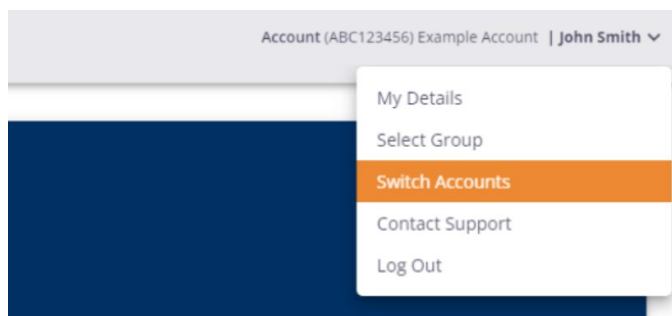
### Step 1

Once you have successfully logged into Hub, you will be at the highest view that you have access to. For example, if you are a Company user, you will be at the Company level view. Your current view can be clearly seen in the header.



### Step 2

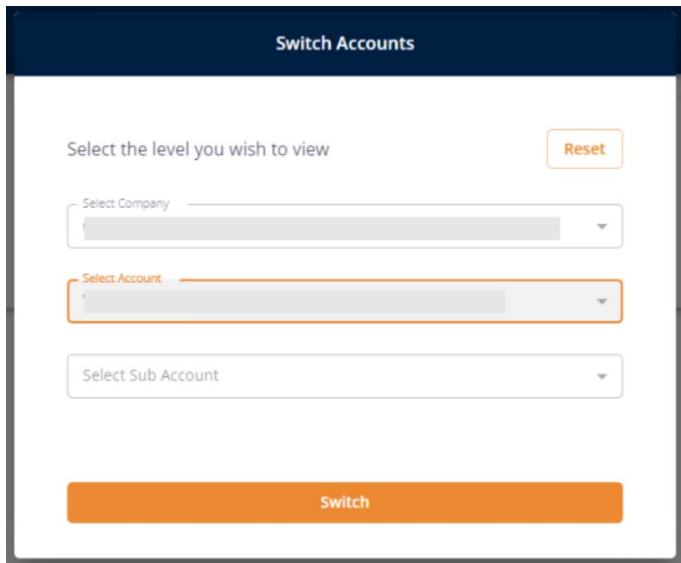
To switch to another level or account within the same organisation, click the top right menu and then click **Switch Accounts**.



### Step 3

A dialog box like the below will display where you can select your desired level.

Note: Some fields may not display if they are irrelevant for you, such as the ‘Sub Account’ field if the account has no sub accounts.



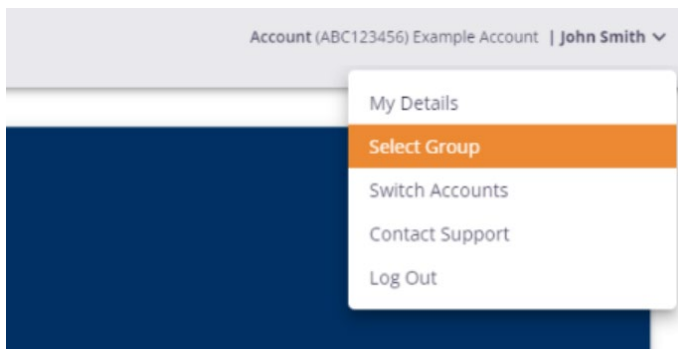
#### Step 4

After clicking 'Switch', the header will update to the level you are now viewing, all MyAccount pages will display data for the selected account and changes you make will be applied to it.

## Switch Groups

#### Step 1

If you have access to more than one Group (organisation), then you will see the **Select Group** option in the top right menu. After clicking this, you will be taken to the Select Group screen.



#### Step 2

From the Select Group screen, you can see all the different groups you have access to.



You have access to multiple groups.  
Please select the group you want to access.

Three identical rectangular boxes arranged horizontally. Each box has a white background with a thin grey border. In the center of each box is a horizontal grey bar. At the bottom of each box is an orange bar with the word "Select" written in white text.

### Step 3

After selecting a group, the header will be updated and you will be able to switch accounts with the new group, if you have access to more than one account within it.

# Bill Explorer

The New MyAccount's Bill Explorer offers powerful search, filtering, customisation and exporting of your bill data. This guide will take you through how it is used.

## Bill Summary

### Step 1

By selecting Bills and then Bill Explorer from the left-hand menu, you will be taken to the Bill Explorer section.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.

The screenshot shows the Daisy Bill Explorer interface. The left-hand menu has 'Billing' selected, and 'Bill Explorer' is highlighted. The top header shows 'Account (ABC123456) Example Account | John Smith'. The main content area is titled 'Bill Explorer' and has three tabs: 'Bill Summary' (selected), 'Usage Analysis', and 'Service Analysis'. Under 'Bill Summary', there is a 'Unbilled (September 2022)' section and a list of months from August 2022 to January 2022. A 'Select earlier month' dropdown is below the list. A callout '1' points to this dropdown. To the right, the 'August 2022' bill summary is shown, including 'Invoice No:', 'Invoice Date: 07 Sep 2022', 'Sub Total: £0.00', 'VAT: £0.00', and 'Total: £0.00'. A callout '2' points to this summary. Below the total, there is a 'Bill Breakdown' table with categories: 'Service Charges' (£0.00), 'Usage Charges' (£0.00), and 'Other Charges & Credits' (£0.00). A callout '3' points to this table. At the top right of the main content area, there are two buttons: 'Download' and 'Explore Usage'. Callouts '4' and '5' point to these buttons respectively.

- 1 Bill period selector – allows you to select any billed period as well as unbilled.
- 2 Bill Summary Information – summary information about the selected bill including the period, invoice number and totals.
- 3 Bill Breakdown – a breakdown of your bill by high level categories.
- 4 Download – option to download the PDF invoice, calls Report, Services Report and Cost Centre Report.



- 5 Explore Calls – option to navigate to the Usage Analysis section to further analyse the usage that make up this bill.

**Bill Explorer**

Bill Summary Usage Analysis Service Analysis

Unbilled (September 2022)

August 2022
July 2022
June 2022
May 2022
April 2022
March 2022
February 2022
January 2022

Select earlier month

**1** →

**2** →

**3** →

**August 2022** Download Explore Usage

Invoice No:   
 Invoice Date: 07 Sep 2022

Sub Total	£0.00
VAT	£0.00
<b>Total</b>	<b>£0.00</b>

Service Charges	£0.00
Bolt On Charges	£0.00
Line Rental Charges	£0.00
Usage Charges	£0.00
Data	£0.00
Other Charges & Credits	£0.00

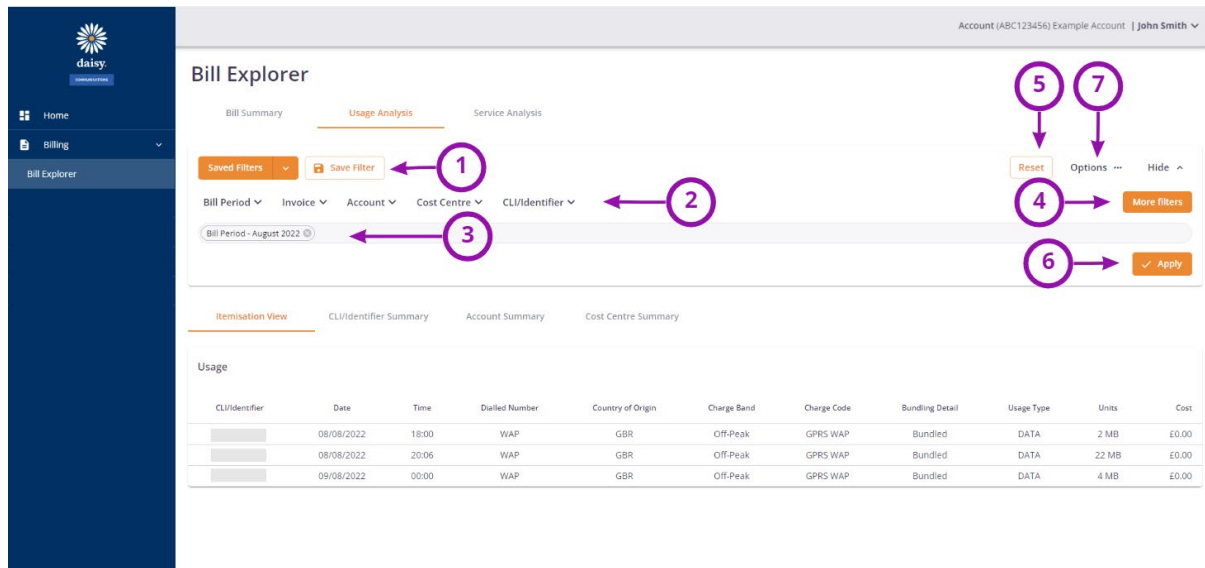
- 1 Service Charges – total service charges along with a breakdown by charge category. Each total is clickable, allowing you to view the data that makes up the totals.
- 2 Usage Charges – total usage charges along with a breakdown by usage type. Each total is clickable, allowing you to view the data that makes up the totals.
- 3 Other Charges & Credits – totals for credits and one off charges.

## Usage Analysis

### FILTERING USAGE DATA

After navigating to the Usage Analysis tab within Bill Explorer, you can apply various filters to the usage records. The filters can also be saved for re-use later.

Note: Remember to click the 'Apply' button after you've made changes to your filters.



- 1 Save Search – ability to view saved filters and save new filters.
- 2 Filters – apply filters to view specific usage data.
- 3 Applied Filters – this section displays the filters that have been applied.
- 4 More Filters – not all filter options are displayed, more can be add to the view here.
- 5 Reset – Remove all filters.
- 6 Apply – Apply the filters to run the search.
- 7 Export to csv – exports the results to csv.

### ITEMISATION VIEW

The itemisation view displays all usage records in an infinite scrolling view

CLI/Identifier	Date	Time	Dialled Number	Country of Origin	Charge Band	Charge Code	Bundling Detail	Usage Type	Units	Cost
[Redacted]	08/08/2022	18:00	WAP	GBR	Off-Peak	GPRS WAP	Bundled	DATA	2 MB	£0.00
[Redacted]	08/08/2022	20:06	WAP	GBR	Off-Peak	GPRS WAP	Bundled	DATA	22 MB	£0.00
[Redacted]	09/08/2022	00:00	WAP	GBR	Off-Peak	GPRS WAP	Bundled	DATA	4 MB	£0.00

### CLI/IDENTIFIER SUMMARY VIEW

The CLI/Identifier Summary view summarises all the resulting data by CLI/Identifier. This is usually your telephone number.

Various additional columns are available and can be added using the column picker. Clicking a total will display the usage that makes up the total.

### ACCOUNT SUMMARY VIEW

The Account Summary view summarises all the resulting data by Account.

Much like the CLI/Identifier summary, there are additional columns of data that are available and can be added using the column picker. Clicking a total will display the usage that makes up the total.

Accounts	Account Names	International Calls	Domestic Calls	Total Data(Units)	Total Data(Cost)	Call Duration	Total
		N/A	N/A	28 MB	£0.00	N/A	£0.00
		£0.00	£0.00	28 MB	£0.00		£0.00

### COST CENTRE SUMMARY VIEW

The Cost Centre Summary view summarises all the resulting data by Cost Centre.

Again, just like the other summary tabs, you can add and remove columns using the column picker. Clicking a total will display the usage that makes up the total.

Account	Cost Centre	International Calls	Domestic Calls	Total Data(Units)	Total Data(Cost)	Call Duration	Total
		N/A	N/A	28 MB	£0.00	N/A	£0.00
		£0.00	£0.00	28 MB	£0.00		£0.00

## Service Analysis

After navigating to the Service Analysis tab within Bill Explorer, much like Usage Analysis, you can apply various filters to your service records and view the results. You can customise the view by adding and removing columns using the column picker.

Account Number	CLI/Identifier	Tag	Charge Description	Category	Frequency	From	To	Monthly Rate Per Unit	Quantity	Total
		N/A	Standard GPRS allocation	Line Rental Charges	Monthly	01/09/2022	30/09/2022	£0.00	1	£0.00
		N/A	VDEL - Eureka Low User	Line Rental Charges	Monthly	01/09/2022	30/09/2022	£0.00	1	£0.00
		test7	VSSVD - S&S Voice & Data	Line Rental Charges	Monthly	01/09/2022	30/09/2022	£0.00	1	£0.00

# Account Management

This guide will take you through the Account Details section where you can manage your bill settings, Payment Details where you can manage your direct debit settings and Manage Contacts where you can manage your account and alert contacts.

## Billing Address, Bill Type and Bill Email

### Step 1

Click the **Account Management** menu option and then **Account Details**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.

The screenshot shows the Daisy Account Management interface. On the left is a dark blue sidebar menu with the Daisy logo and navigation options: Home, Billing, Account Management (selected), Manage Contacts, Account Details, and Payment Details. The top right header displays 'Account (ABC123456) Example Account | John Smith'. The main content area is titled 'Account Details' and is divided into three sections:

- Billing Address:** Contains input fields for 'Address line 1' (Example House), 'Address line 2' (1 Example Street), 'Address line 3' (Manchester), 'Address line 4', and 'Address line 5'. Below these are fields for 'Country' (United Kingdom) and 'Postcode' (M1 1AA), with an 'Update' button at the bottom.
- My Billing Type Setting:** States 'Your account is set to online billing' and features a 'Switch to paper billing' button.
- Billing Notification Email Address:** Features an input field with 'john.smith@example.com' and an 'Update' button.

### Step 2

You can update your billing address on this screen as well the bill delivery method (paper bill or online bill) and the email that is notified when your bill is ready.

## Manage Direct Debit Details

SET UP DIRECT DEBIT

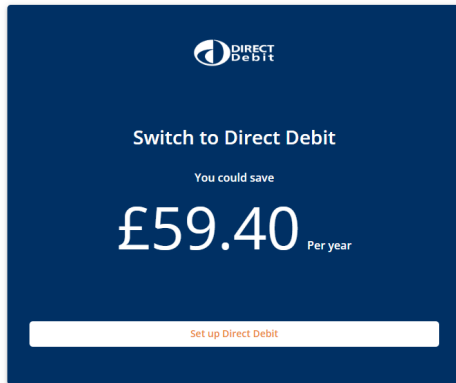
## 1.3. Document Classification: Public

Page 13

### Step 1

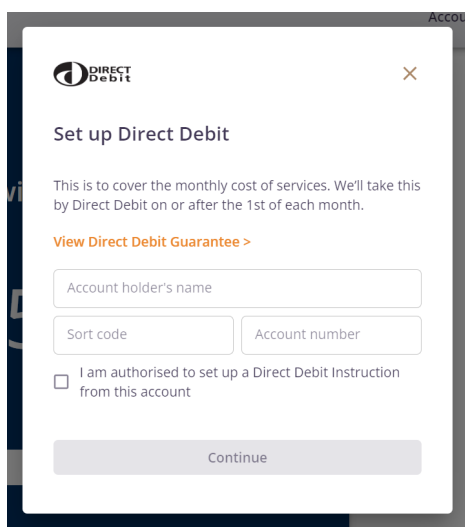
From the menu, expand **Account Management** and then select **Payment Details**. This page will look like the below if you have not set up direct debit on your account.

Payment details



### Step 2

Click the **Set up Direct Debit** button



### Step 3

Complete the form with valid bank details and then click **Continue**. The details will be saved.

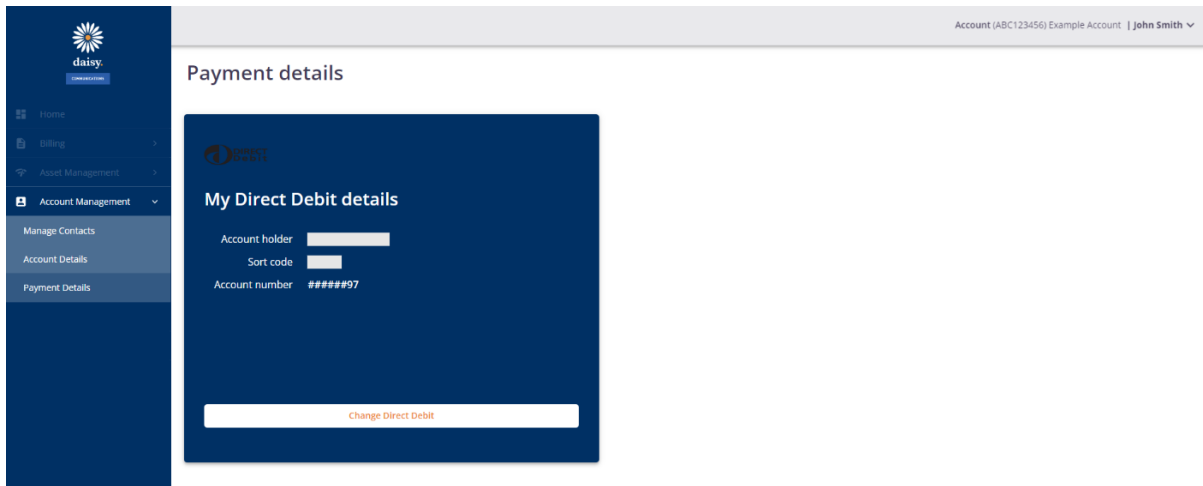
UPDATE DIRECT DEBIT

### Step 1

From the menu, expand **Account Management** and then select **Payment Details**. This page will look like the below if you have set up direct debit on your account. For security purposes, we hash out the first six digits of your account number.

WELCOME TO

MyAccount



### Step 2

Click the 'Change Direct Debit' button, add new bank details, and then save.

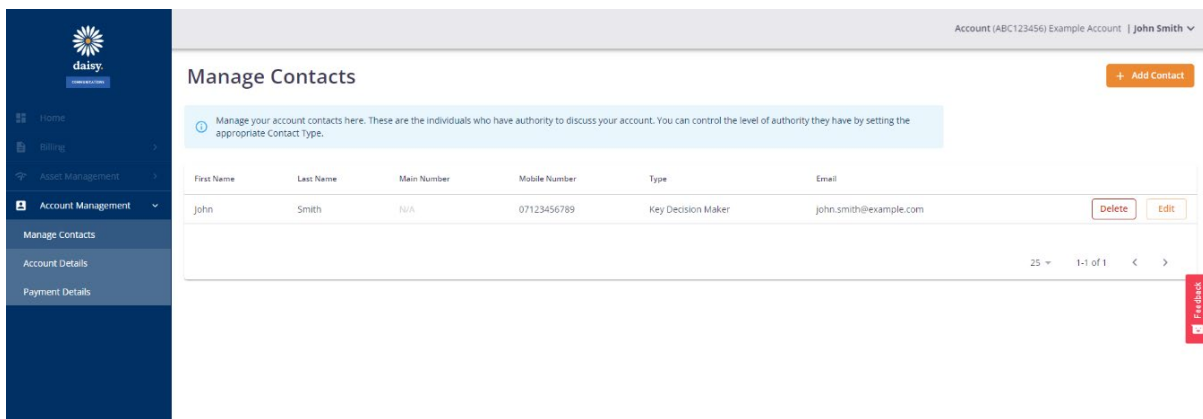
## Manage Account/Alert Contacts

Manage your account and alert contacts. These are the individuals who have authority to discuss your account and will be available to select in the Usage Alert section. You can control the level of authority they have by setting the appropriate Contact Type.

### CREATE A CONTACT

#### Step 1

From the menu, expand **Account Management** and then select **Manage Contacts**. This page will display all account contacts as well as alert contacts that you have access to view. If you only see alert contacts, you do not have the Manage Contacts permission.



### 1.3. Document Classification: Public

#### Step 2

Click the **Add Contact** button, complete the form, and then submit.

The screenshot shows the 'Add Contact' form within the Daisy MyAccount interface. The left sidebar contains navigation options: Home, Billing, Asset Management, Account Management (expanded), Manage Contacts, Account Details, and Payment Details. The main content area is titled 'Add Contact' and contains a 'Contact Details' form with the following fields: First name, Last name, Main number, Mobile number, Email / Username, and Contact type (a dropdown menu). At the bottom right of the form are 'Cancel' and 'Submit' buttons. The top right of the page shows 'Account (ABC123456) Example Account | John Smith'. A 'Feedback' button is visible on the right side of the page.

#### UPDATE A CONTACT

#### Step 1

From the menu, expand **Account Management** and then select **Manage Contacts**. This page will display all account contacts as well as alert contacts that you have access to view. If you only see alert contacts, you do not have the Manage Contacts permission.

The screenshot shows the 'Manage Contacts' page. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Manage Contacts' and includes an '+ Add Contact' button. Below the title is a blue information box: 'Manage your account contacts here. These are the individuals who have authority to discuss your account. You can control the level of authority they have by setting the appropriate Contact type.' Below this is a table with the following data:

First Name	Last Name	Main Number	Mobile Number	Type	Email	
John	Smith	N/A	07123456789	Key Decision Maker	john.smith@example.com	Delete Edit

At the bottom right of the table, there is a pagination indicator: '25 = 1-1 of 1 < >'. A 'Feedback' button is visible on the right side of the page.

#### Step 2

Click the **Edit** button next to the contact you wish to update, make your changes and then submit.



Account (ABC123456) Example Account | John Smith

## Manage Contacts

+ Add Contact

Manage your account contacts here. These are the individuals who have authority to discuss your account. You can control the level of authority they have by setting the appropriate Contact type.

First Name	Last Name	Main Number	Mobile Number	Type	Email	
John	Smith	N/A	07123456789	Key Decision Maker	john.smith@example.com	Delete Edit

25 1-1 of 1 < >

Feedback

### DELETE A CONTACT

#### Step 1

From the menu, expand **Account Management** and then select **Manage Contacts**. This page will display all account contacts as well as alert contacts that you have access to view. If you only see alert contacts, you do not have the Manage Contacts permission.

#### Step 2

Click the **Delete** button next to the contact you wish to delete.

Note: The **Delete** button will not display if the contact is in use on a Usage Alert. To delete the alert, you must first remove the contact from the usage alerts.

# Manage Users & Roles

The Manage Users section allows you to manage your MyAccount users and their permissions.

## Manage Users

### Step 1

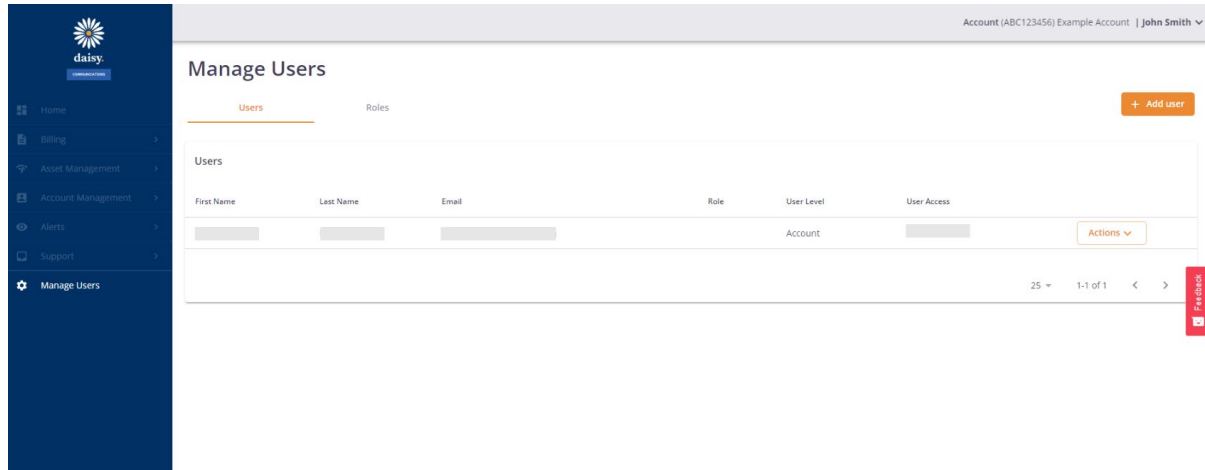
Click the **Manage Users** menu option. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.

### Step 2

The page lists all users that you can view, it does not display users with an access level higher than yours.

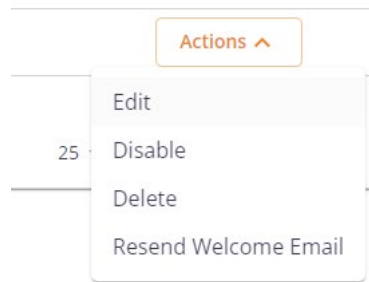
Note: if you switch to another level using the Account Switcher, the list will reflect the level you have switched to.



## VIEW/EDIT A USER

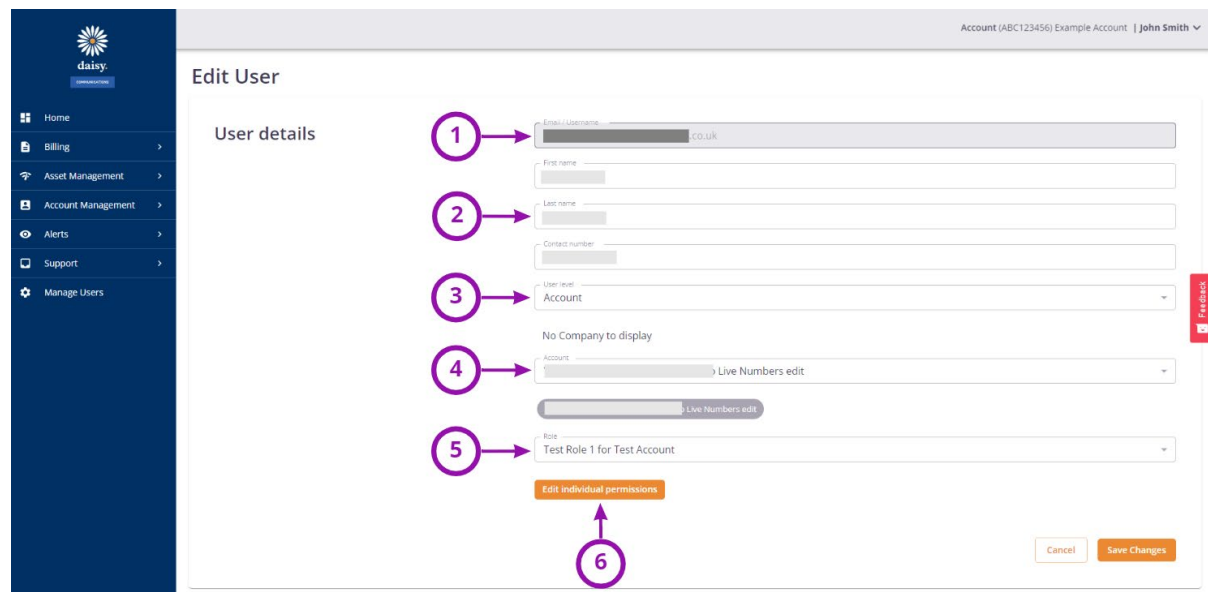
### Step 1

Whilst in the Manage Users section, click the **Actions** button next to any user to reveal more options.



**Step 2**

Click **Edit** to view the user.



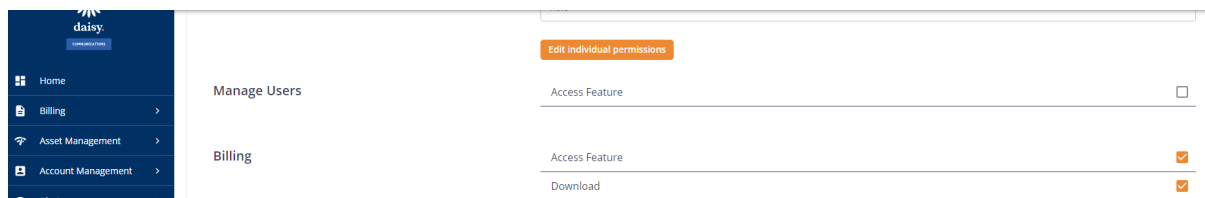
- 1 Email address – the email address will be unique in our authentication system. This means you cannot use the same email address twice within the same Group/Organisation. When adding an existing user to another Group, the user will have access to the new Group using their existing credentials, however, their access and permissions will remain independent.
- 2 Name, contact number – these are properties of the user and are therefore shared across all instances of the user so if the user has access to more than one Group, updating these fields will update their name/number on the other Groups too.
- 3 User Level – this displays the level of access the user has. Users will have access to levels below them but not above them. For example, an Account user will have access to all Sub Accounts under the Account(s) he/she has access to. The options will also reflect your own access level, so if you are an Account user, you will not see the Group and Company options. Options include:
  - Group
  - Company

- Account
  - Sub Account
  - Cost Centre
  - Individual
- 4 User access – Depending on the option selected in User Level, additional relevant fields will display to define what the user has access to. For example, if Account was selected, the user will then need to define which account(s) the user can access.
  - 5 Role – The role the user has. See the Manage Roles section for more details.
  - 6 Edit individual permissions – This will reveal the permissions section.

### Step 3

Click the **Edit individual permissions** button to reveal the permissions the user has access to.

You can enable or disable access to features here.



### Step 4

After making the necessary amendments, click **Save Changes**.

#### ADD A USER

##### Step 1

Whilst in the Manage Users section, click **Add user**, this will take you to the Add User page.

Please see View/Edit Users, step 2 of this guide for more information on these fields.

Note: The email address should not already be used on the account.

##### Step 2

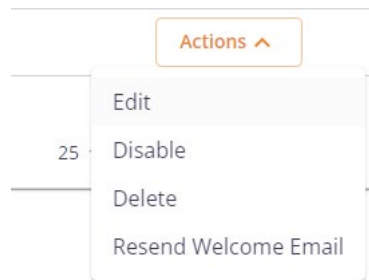
After populating the fields, click **Submit**. The new user will receive an email allowing them to complete the registration process.

#### DISABLE/ENABLE A USER

If you want to temporarily revoke a user's access, you can disable the user. This will block that user's access. Access can be enabled again when required.

#### Step 1

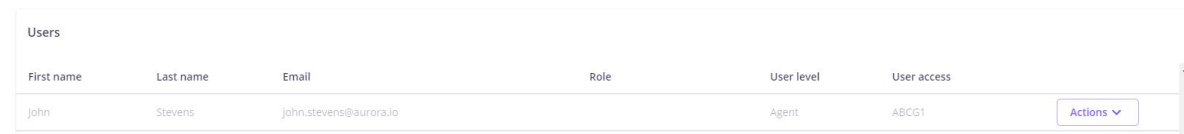
Whilst in the Manage Users section, click the **Actions** button next to the user you wish to disable.



#### Step 2

Click **Disable**. The user will not be able to access this account. Disabled users appear in a lighter grey in Manage Users.

Note: this will only affect the selected account access, it will not affect the users access on any other Group/Organisations they have access to.

A screenshot of a table titled 'Users'. The table has columns for 'First name', 'Last name', 'Email', 'Role', 'User level', and 'User access'. There is one row of data with the following values: 'John', 'Stevens', 'john.stevens@aurora.io', 'Agent', 'ABCG1'. To the right of the table, there is an 'Actions' button with a downward-pointing arrow.

First name	Last name	Email	Role	User level	User access
John	Stevens	john.stevens@aurora.io	Agent	ABCG1	

#### Step 3

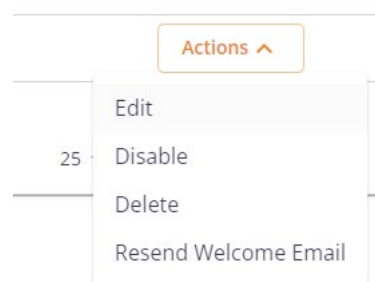
To enable the user again, click the **Actions** button and then click **Enable**. The user will now have access to again.

#### DELETE A USER

If you wish to permanently revoke a user's MyAccount access, you can delete the user. The user will disappear from the view but will remain in the backend system for auditing purposes.

##### Step 1

Whilst in the Manage Users section, click the **Actions** button next to the user you wish to delete.



##### Step 2

Click **Delete**. The user will no longer appear in MyAccount and will no longer be able access this account. You can create a user with the same email address again if you require.

## Manage Roles

Roles make managing large number of users easy. By creating Roles and then assigning them to users you can manage permissions centrally as users would inherit permissions from their role but won't be limited to them.

### ADD A ROLE

#### Step 1

Click the **Manage Users** menu item then click the **Roles** tab. You will be able to see all the roles under your Company.

#### Step 2

Click **Add role**. This will take you to the Add Role page.

#### Add Role

Role Name	<input type="text" value="Role name"/>
Manage Users	Access Feature <input type="checkbox"/>
Billing	Access Feature <input type="checkbox"/>
	Download <input type="checkbox"/>

#### Step 3

Give the role a name and set its permissions, then click **Submit**. You will have now created a role which can be applied to any user

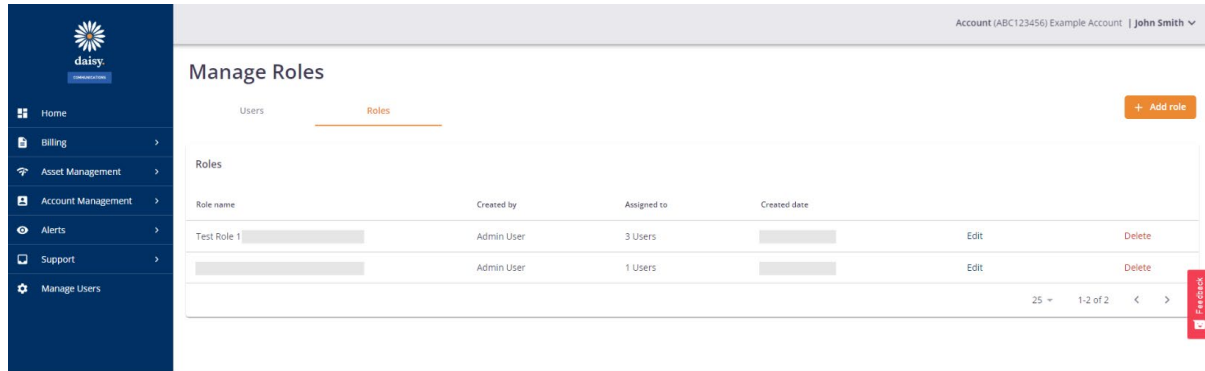
### APPLY A ROLE TO A USER

Once a Role has been created, it can be applied to a user. Users will then inherit the Role's permissions.



### Step 1

Ensure you have already created a Role. This can be done by navigating to **Manage Users** and then selecting the **Roles** tab.



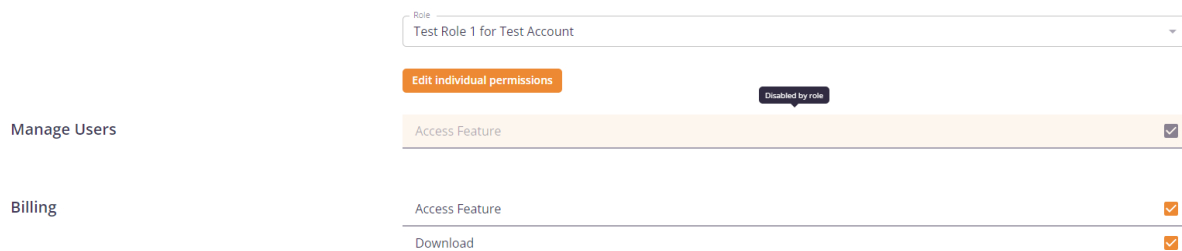
### Step 2

To assign a role to a user, click the **Users** tab, find the user you want to edit, then select that user's **Actions** and **View**. From the Edit User screen, the **Role** field will contain all the roles visible in the Roles tab in step 1.



### Step 3

Select a Role then click the **Edit individual permissions** button. Permissions that have been inherited by the role will appear pre-ticked and disabled, as in the example below.



### Step 4

Additional permissions, outside of the Role, can be granted. These are distinguishable from the Role permissions.

### Step 5

Click **Save Changes** to apply your changes.

## 1.3. Document Classification: Public

Page 25

EDIT A ROLE

### Step 1

Select **Manage Users** from the menu and then click the **Roles** tab. Here we can see how many users have been assigned to each Role.

Role name	Created by	Assigned to	Created date		
Test Role 1	Admin User	3 Users		Edit	Delete
	Admin User	1 Users		Edit	Delete

### Step 2

Click **Edit** and then make the necessary changes.

### Step 3

Click **Save Changes**. The changes will be applied to all users of the role.

WELCOME TO

MyAccount

## 1.3. Document Classification: Public

Page 26

### DELETING A ROLE

#### Step 1

Select **Manage Users** from the menu and then click the **Roles** tab. We can see how many users have been assigned to each Role.

**Note: ensure no users are assigned to the role before it is deleted.**

The screenshot displays the 'Manage Roles' page in the Daisy MyAccount system. The page title is 'Manage Roles' and it features a navigation menu on the left with options like Home, Billing, Asset Management, Account Management, Alerts, Support, and Manage Users. The main content area shows a table of roles with columns for Role name, Created by, Assigned to, and Created date. Two roles are listed: 'Test Role 1' and another role. The 'Test Role 1' row shows 'Admin User' as the creator and '3 Users' as assigned. The second row shows 'Admin User' as the creator and '1 Users' as assigned. Each row has 'Edit' and 'Delete' buttons. A '+ Add role' button is in the top right. A pagination bar at the bottom right shows '25', '1-2 of 2', and navigation arrows. A red 'Feedback' button is on the right edge.

#### Step 2

Click the **Delete** button next to the role you wish to delete. The role will then be deleted.

# Asset Management

View and manage your assets (the services you have with us). You can also create and assign cost centres as well as update usernames/tags.

## Search Assets

See all the services you have with us in one place.

### Step 1

Click the **Asset Management** menu option and then **Search Assets**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.

### Step 2

The page displays all the services you have with us, including the product type and status. There are several filters that can be used if you want to find a specific set of assets.

The screenshot shows the 'Search Assets' interface. At the top right, it displays 'Account (ABC123456) Example Account | John Smith'. Below this is a 'Filter' section with dropdown menus for 'Account', 'CLI/Identifier', 'Tag', and 'Cost Centre', and a 'Reset' button. A search bar is located below the filters. The main content is a table with the following columns: CLI/Identifier, Tag, Cost Centre, Account, Product Type, and Status. The table contains three rows of data, each with a 'View' button on the right.

CLI/Identifier	Tag	Cost Centre	Account	Product Type	Status	
[Redacted]	John Smith	North East:Newcastle	[Redacted]	Mobile	Live	<a href="#">View</a>
[Redacted]	[Redacted]	N/A	[Redacted]	Mobile	Live	<a href="#">View</a>
[Redacted]	N/A	N/A	[Redacted]	Mobile	Live	<a href="#">View</a>

### Step 3

Click **View** to see more of the asset's details. If the asset is a mobile product, you will find the SIM Number and Provider.

#### Asset Details

CLI/Identifier	Tag	Product Type	Account Number	SIM Number	Provider	Status
07 [Redacted]	John Smith <a href="#">Edit</a>	Mobile	[Redacted]	89441000 [Redacted]	Vodafone	Live

## Update Tag/Username

You can update an asset's tag/username in the Search Assets section.

### Step 1

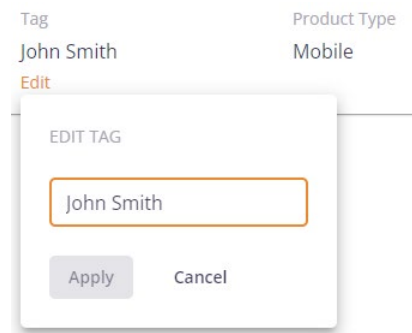
Select the **Asset Management** menu option and then **Search Assets**.

### Step 2

Click to **View** the asset you wish to update.

### Step 3

The **Tag** field will display the current tag/username which you can update using the **Edit** button.



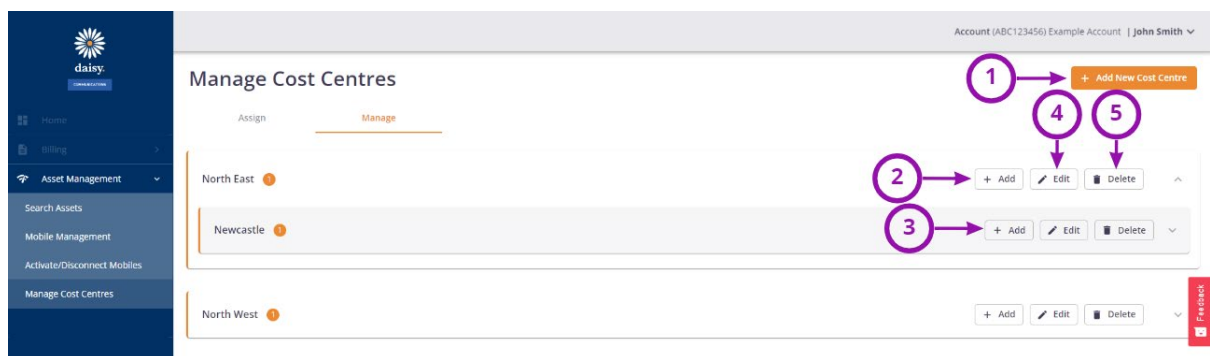
## Create Cost Centres

Cost centres allow you to organise and group your charges. A report providing a breakdown of your charges for cost centre costing purposes can be downloaded from the Bill Explorer every month.

### Step 1

Click the **Asset Management** menu option and then **Manage Cost Centres**. From here, select the **Manage** tab.

All the account's cost centres will display.



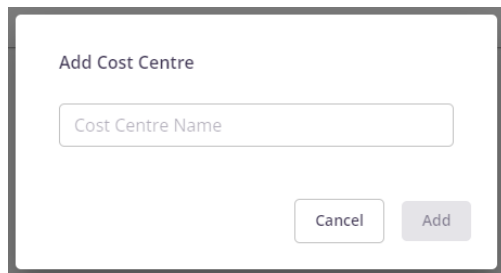
1 | Add a new top level cost centre

2 | Add a level 2 cost centre, which is a cost centre within the selected cost centre

- 3 Add a level 3 cost centre
- 4 Edit a cost centre – this will update all numbers the cost centre is assigned to
- 5 Delete a cost centre – if some numbers are assigned to the cost centre, their cost centre setting will be cleared

### Step 2

Click the relevant **Add** button (1 to 3 above), name your new cost centre and then click **Add**. The new cost centre will appear on the page.



The screenshot shows a modal window titled "Add Cost Centre". Inside, there is a text input field with the placeholder text "Cost Centre Name". Below the input field are two buttons: "Cancel" and "Add".

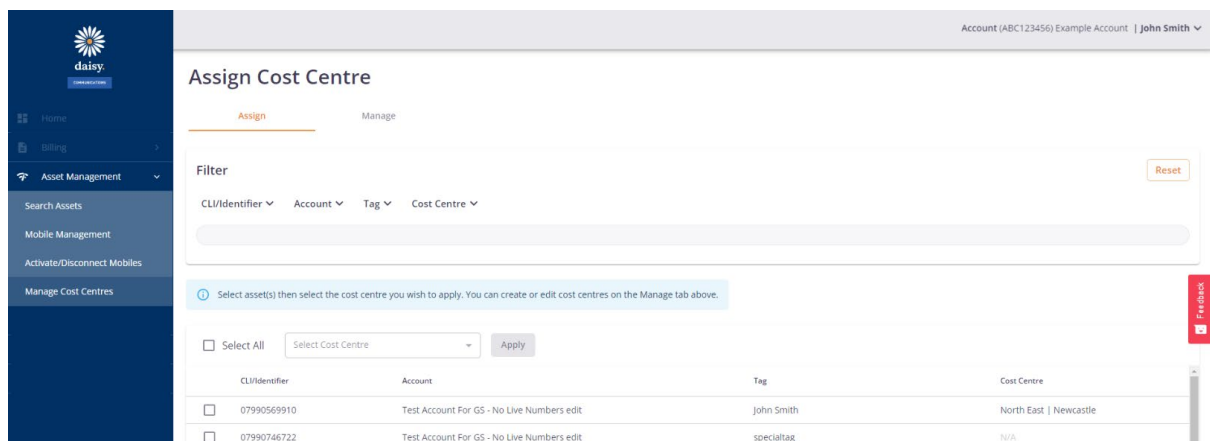
## Assign Cost Centre

### Step 1

Click the **Asset Management** menu option and then **Manage Cost Centres**.

### Step 2

All your assets will display on the resulting screen. Filters can be used to limit the results to a particular subset.



The screenshot displays the "Assign Cost Centre" page. On the left is a dark blue sidebar with the Daisy logo and navigation options: Home, Billing, Asset Management (selected), Search Assets, Mobile Management, Activate/Disconnect Mobiles, and Manage Cost Centres. The top navigation bar shows "Account (ABC123456) Example Account | John Smith". The main content area has tabs for "Assign" (active) and "Manage". Below the tabs is a "Filter" section with dropdown menus for "CLI/Identifier", "Account", "Tag", and "Cost Centre", and a "Reset" button. A message box states: "Select asset(s) then select the cost centre you wish to apply. You can create or edit cost centres on the Manage tab above." Below this is a "Select All" checkbox and a "Select Cost Centre" dropdown menu with an "Apply" button. A table lists assets with columns for "CLI/Identifier", "Account", "Tag", and "Cost Centre".

CLI/Identifier	Account	Tag	Cost Centre	
<input type="checkbox"/>	07990569910	Test Account For GS - No Live Numbers edit	John Smith	North East   Newcastle
<input type="checkbox"/>	07990746722	Test Account For GS - No Live Numbers edit	specialtag	N/A

### Step 3

### 1.3. Document Classification: Public

Page 30

Select the assets you would like to update, then select the Cost Centre you want to assign using the **Select Cost Centre** field, then click **Apply**.

📘 Select asset(s) then select the cost centre you wish to apply. You can create or edit cost centres on the Manage tab above.

Select All    Select Cost Centre North West   

	CLI/Identifier	Account	Tag	Cost Centre
<input type="checkbox"/>	07		John Smith	North East   Newcastle
<input checked="" type="checkbox"/>	07		specialtag	N/A

#### Step 4

Click **Yes** to confirm the change. The change will usually be applied immediately.

Are you sure?

# Mobile Management

Manage your mobile bars, SIMs and more.

## Manage Bars

### Step 1

Click the **Asset Management** menu option and then **Mobile Management**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

The page displays all your live mobile services.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.

The screenshot shows the Daisy Mobile Management interface. The top header displays the Daisy logo and the user's account information: "Account (ABC123456) Example Account | John Smith". The left sidebar contains navigation options: Home, Billing, Asset Management (selected), Search Assets, Mobile Management, Activate/Disconnect Mobiles, and Manage Cost Centres. The main content area is titled "Mobile Management" and has two tabs: "Management" (active) and "History". Below the tabs is a "Filter" section with dropdown menus for "Account", "CLI/Identifier", "Tag", and "Cost Centre", and a "Reset" button. A message states: "Select asset(s) then select the action you want to perform." Below this is a "Select All" checkbox, a "Select Actions" dropdown, and an "Apply" button. A table lists mobile assets with the following columns: CLI/Identifier, Tag, Network, Cost Centre, and Account. Two rows are shown:

CLI/Identifier	Tag	Network	Cost Centre	Account
07	John Smith	Vodafone	North East:Newcastle	YWJ35776
07	N/A	Vodafone	N/A	YWJ35776

### Step 2

Find the asset(s) you want to update. Filters can be used to assist with this.

### Step 3

Select the mobile number(s) you wish to update.



Select asset(s) then select the action you want to perform.

Select All    Select Actions    Apply

CLI/Identifier	Tag	Network
<input checked="" type="checkbox"/> 07	John Smith	Vodafone

**Step 4**

Select the **Manage Bars** action from **Select Actions** then click **Apply**.

Select asset(s) then select the action you want to perform.

Select All    **Manage Bars**    Apply

CLI/Identifier	Tag	Network
<input checked="" type="checkbox"/> 07	John Smith	Vodafone

**Step 5a – where one number was selected**

If only one number was selected in step 3, then the bars page will load with your current settings pre-selected. Make your changes then click **Apply**.

**Manage Bars** (1 CLIs selected) Reset ×

Please be aware when placing International bars, this excludes the Republic of Ireland. Standard international charges apply.

Category	Setting	On	Off
Admin	Bars	<input type="radio"/>	<input checked="" type="radio"/>
	Block All	<input type="radio"/>	<input checked="" type="radio"/>
	Block All (Stolen)	<input type="radio"/>	<input checked="" type="radio"/>
	All call bars due to SIM cancellation	<input type="radio"/>	<input checked="" type="radio"/>
Calls and Data	Bars	<input type="radio"/>	<input checked="" type="radio"/>
	Incoming Calls	<input type="radio"/>	<input checked="" type="radio"/>
	Outgoing Calls	<input type="radio"/>	<input checked="" type="radio"/>
	Data	<input type="radio"/>	<input checked="" type="radio"/>
International and Premium	Bars	<input type="radio"/>	<input checked="" type="radio"/>
	International and Premium Rate	<input checked="" type="radio"/>	<input type="radio"/>
	International Outgoing (ex to home Country)	<input type="radio"/>	<input checked="" type="radio"/>
	Premium Text	<input checked="" type="radio"/>	<input type="radio"/>
Roaming	Bars	<input type="radio"/>	<input checked="" type="radio"/>
	Incoming Roaming	<input type="radio"/>	<input checked="" type="radio"/>
	Outgoing Roaming	<input type="radio"/>	<input checked="" type="radio"/>
	International Roaming	<input checked="" type="radio"/>	<input type="radio"/>
Texts	Bars	<input type="radio"/>	<input checked="" type="radio"/>
	Combined SMS Bar	<input type="radio"/>	<input checked="" type="radio"/>
	Incoming SMS	<input type="radio"/>	<input checked="" type="radio"/>
	Outgoing SMS	<input type="radio"/>	<input checked="" type="radio"/>
Auto bars	Bars	<input type="radio"/>	<input checked="" type="radio"/>
	Bill Limit Bar	<input checked="" type="radio"/>	<input type="radio"/>

Apply

**Step 5b – where more than one number was selected**

If more than one number was selected in step 3, then the bars page will load with no settings pre-selected. Make your changes then click **Apply**.

Note: the changes will be applied to all numbers you selected. These can fail if you have selected a bar which is incompatible with an existing bar, so please make sure you monitor the action in the History tab.

Note: if you selected O2 and Vodafone numbers, then you'll get two set bar pages, one for each network.

**Manage Vodafone Bars** (2 CLIs selected) Reset ×

⚠ Please be aware when placing International bars, this excludes the Republic of Ireland. Standard international charges apply.

Admin	Calls and Data	International and Premium
<b>Bars</b> On   Off Block All <input type="radio"/> <input type="radio"/> Block All (Stolen) <input type="radio"/> <input type="radio"/> All call bars due to SIM cancellation <input type="radio"/> <input type="radio"/>	<b>Bars</b> On   Off Incoming Calls <input type="radio"/> <input type="radio"/> Outgoing Calls <input type="radio"/> <input type="radio"/> Data <input type="radio"/> <input type="radio"/> Content Control (Call Voda to remove) <input type="radio"/> <input type="radio"/>	<b>Bars</b> On   Off International and Premium Rate <input type="radio"/> <input type="radio"/> Premium Text <input type="radio"/> <input type="radio"/> MPAY Bar <input type="radio"/> <input type="radio"/> Premium Calls <input type="radio"/> <input type="radio"/> International outgoing calls <input type="radio"/> <input type="radio"/>
<b>Roaming</b>	<b>Texts</b>	
<b>Bars</b> On   Off Incoming Roaming <input type="radio"/> <input type="radio"/> Outgoing Roaming <input type="radio"/> <input type="radio"/> International Roaming <input type="radio"/> <input type="radio"/> GPRS Roaming <input type="radio"/> <input type="radio"/>	<b>Bars</b> On   Off Combined SMS Bar <input type="radio"/> <input type="radio"/> Incoming SMS <input type="radio"/> <input type="radio"/> Outgoing SMS <input type="radio"/> <input type="radio"/> Incoming MMS <input type="radio"/> <input type="radio"/> Outgoing MMS <input type="radio"/> <input type="radio"/>	

Apply

**Step 6**  
Verify that you are happy with the changes, click **Continue**.

**Confirmation** (1 CLI selected) Reset ×

ⓘ Please confirm you wish to make the below changes.

Bars	Action
Incoming Roaming	<input checked="" type="checkbox"/> Add Bar
Outgoing MMS	<input checked="" type="checkbox"/> Remove Bar

← Previous Confirm

### Step 7

The change will have been submitted. You can monitor the change on the History tab within Mobile Management. See the [Check Mobile Change Status](#) guide for more details.

Note: changes can take up to 24 hours to fully complete.

## Request PAC/STAC/Switching Information

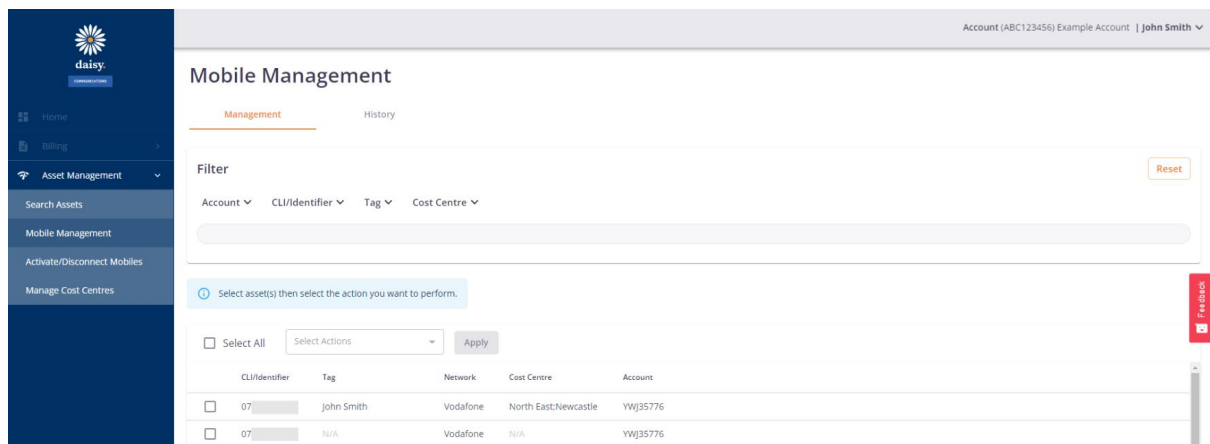
If you are looking to move your mobiles to a new provider, you will need a PAC or a STAC code.

### Step 1

Click the **Asset Management** menu option and then **Mobile Management**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

The page displays all your live mobile services.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.



### Step 2

Find the asset(s) you want to update. Filters can be used to assist with this.

### Step 3

Select the mobile number(s) you wish to update.

Select asset(s) then select the action you want to perform.

Select All    Select Actions    Apply

CLI/Identifier	Tag	Network
<input checked="" type="checkbox"/> 07	John Smith	Vodafone

### Step 4

Select the **Request PAC/STAC** action from **Select Actions** then click **Apply**.

Select asset(s) then select the action you want to perform.

Select All    Select Actions: Request PAC/STAC    Apply

CLI/Identifier	Tag	Network
<input checked="" type="checkbox"/> 07	John Smith	Vodafone

### Step 5

Select the appropriate option then click **Apply**.

**Auto Switch** [Close]

- Request PAC Code  
Switch providers and take your number with you
- Request STAC Code  
Switch providers and don't take your number with you
- Request Switching Information  
Learn how much you'd get charged if you switched providers

Send SMS to End User  
Send the requested information via SMS to each of the mobile numbers selected

Feedback

Apply

### Step 6

The information you request will be displayed. You will also find these on the **Disconnect Mobiles** tab in **Activate/Disconnect Mobiles**.

**Auto Switch - Confirmation** [Close]

Number	PAC Code	Expiry Date	Early Termination Fee	Status
07		19/10/2022	£0.00	Complete

25 ▾ 1-1 of 1 < >

## Worldwide Data Roaming

Worldwide Legislation from OFCOM means that we will be capping your Worldwide data roaming at £45 ex. VAT per billing month and barring you from using any more data abroad for the rest of your billing period.

### Step 1

Click the **Asset Management** menu option and then **Mobile Management**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

The page displays all your live mobile services.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.

Account (ABC123456) Example Account | John Smith

### Mobile Management

Management History

Filter Reset

Account ▼ CLI/Identifier ▼ Tag ▼ Cost Centre ▼

Select asset(s) then select the action you want to perform.

Select All Select Actions Apply

CLI/Identifier	Tag	Network	Cost Centre	Account
<input type="checkbox"/> 07	John Smith	Vodafone	North East:Newcastle	YWJ35776
<input type="checkbox"/> 07	N/A	Vodafone	N/A	YWJ35776

### Step 2

Find the asset(s) you want to update. Filters can be used to assist with this.

### Step 3

Select the mobile number(s) you wish to update.

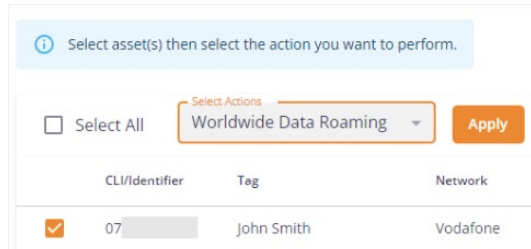
Select asset(s) then select the action you want to perform.

Select All Select Actions Apply

CLI/Identifier	Tag	Network
<input checked="" type="checkbox"/> 07	John Smith	Vodafone

#### Step 4

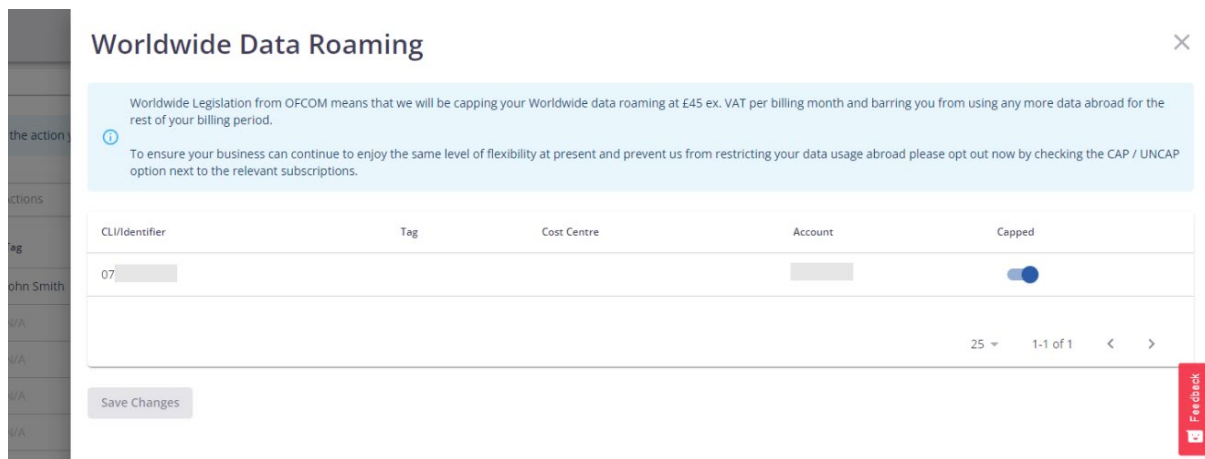
Select the **Worldwide Data Roaming** action from **Select Actions** then click **Apply**.



The screenshot shows a user interface for selecting actions. At the top, there is a blue information banner that says "Select asset(s) then select the action you want to perform." Below this, there is a "Select All" checkbox, a "Select Actions" dropdown menu with "Worldwide Data Roaming" selected, and an "Apply" button. Below the dropdown, there is a table with columns for "CLI/Identifier", "Tag", and "Network". The table contains one row with a checked checkbox, the value "07", the tag "John Smith", and the network "Vodafone".

#### Step 5

Make your changes then click **Save Changes**.



The screenshot shows the "Worldwide Data Roaming" configuration page. At the top, there is a blue information banner with a warning icon and text: "Worldwide Legislation from OFCOM means that we will be capping your Worldwide data roaming at £45 ex. VAT per billing month and barring you from using any more data abroad for the rest of your billing period. To ensure your business can continue to enjoy the same level of flexibility at present and prevent us from restricting your data usage abroad please opt out now by checking the CAP / UNCAP option next to the relevant subscriptions." Below the banner, there is a table with columns for "CLI/Identifier", "Tag", "Cost Centre", "Account", and "Capped". The table contains one row with the value "07" in the "CLI/Identifier" column, "John Smith" in the "Tag" column, and a blue toggle switch in the "Capped" column. At the bottom left, there is a "Save Changes" button. At the bottom right, there is a red "Feedback" button.

#### Step 6

The change will have been submitted. You can monitor the change on the History tab within Mobile Management. See the [Check Mobile Change Status](#) guide for more details.

## SIM Swap

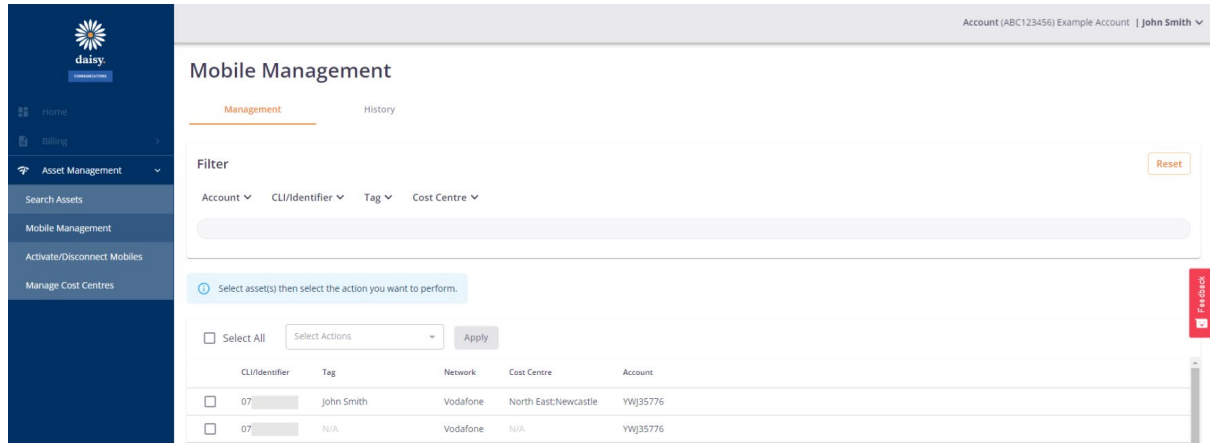
Move your mobile number to a new SIM using the SIM Swap feature.

#### Step 1

Click the **Asset Management** menu option and then **Mobile Management**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

The page displays all your live mobile services.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.

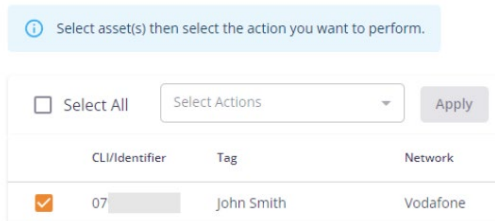


#### Step 2

Find the asset(s) you want to update. Filters can be used to assist with this.

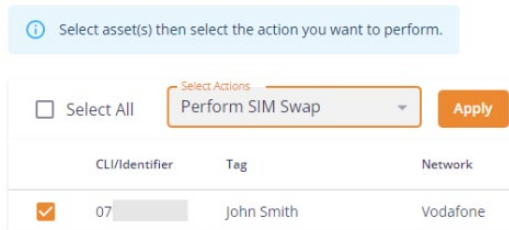
#### Step 3

Select the mobile number(s) you wish to update.



#### Step 4

Select the **Perform SIM Swap** action from **Select Actions**, then click **Apply**.



#### Step 5

The SIM Swap page will display with the current SIM details.

**SIM Swap** ×

Once you click **Activate all** please reboot the handset and allow up to 24 hours for the SIM card to be activated. If, after 24 hours, the SIM card has still not been activated, please contact your dedicated Customer Services team.

**Activate All**

Identifier	Tag	Network	SIM Number	SIM Type	New SIM Number	New SIM Type
07		Vodafone	8944100	-	894410	Triple (Stan...)

### Step 6

Enter the new SIM Number and click **Activate All**.

Note: the network prefix will automatically be populated so in most cases, you only need to enter the number on the SIM card.

to be activated. If, after 24 hours, the SIM card has still not been

**Activate All**

SIM Type	New SIM Number	New SIM Type
-	89441000 ✓	Triple (Stan...)

### Step 7

The change will have been submitted. Please reboot the handset and allow up to 24 hours for the SIM card to be activated. If, after 24 hours, the SIM card has still not been activated, please contact your dedicated Customer Services team.

You can monitor the change on the [History](#) tab within Mobile Management. See the [Check Mobile Change Status](#) guide for more details.

## Update Mobile Bill Limit

This service allows you to set a bill limit (£) against each individual mobile number. Only mobile numbers contracted from 1st October 2018 are eligible for bill limits. Bill limits exclude line rentals.

### Step 1

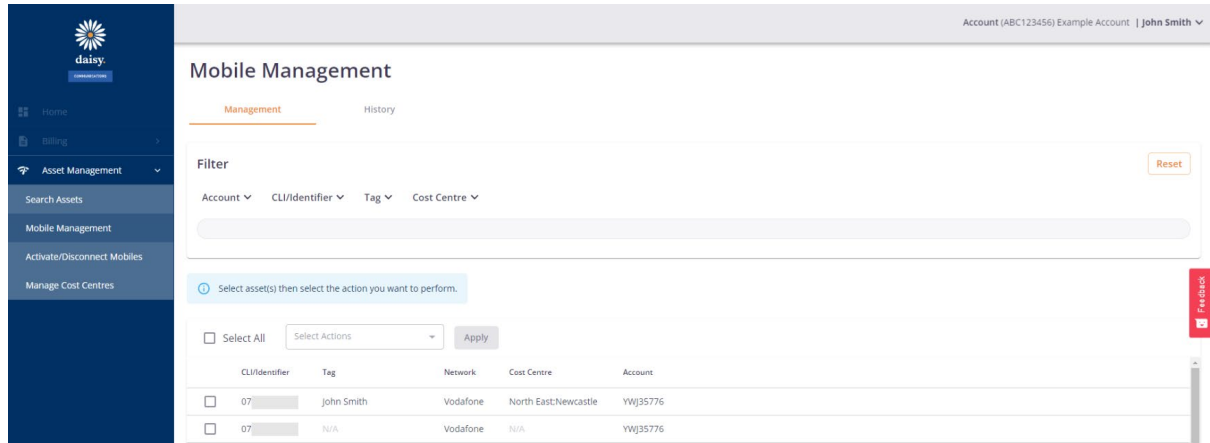
Click the **Asset Management** menu option and then **Mobile Management**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

The page displays all your live mobile services.



## 1.3. Document Classification: Public

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.



The screenshot shows the Daisy Mobile Management interface. The top header displays the account information: "Account (ABC123456) Example Account | John Smith". The main content area is titled "Mobile Management" and has two tabs: "Management" (active) and "History". Below the tabs is a "Filter" section with dropdown menus for "Account", "CLI/Identifier", "Tag", and "Cost Centre", and a "Reset" button. A message box says "Select asset(s) then select the action you want to perform." Below this is a "Select All" checkbox, a "Select Actions" dropdown menu, and an "Apply" button. The table below has columns for "CLI/Identifier", "Tag", "Network", "Cost Centre", and "Account".

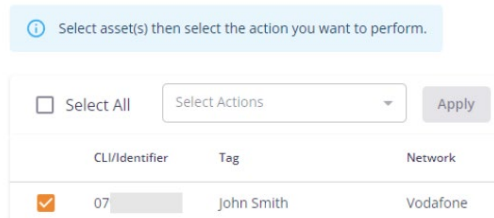
CLI/Identifier	Tag	Network	Cost Centre	Account
<input type="checkbox"/> 07 [redacted]	John Smith	Vodafone	North East:Newcastle	YWJ35776
<input type="checkbox"/> 07 [redacted]	N/A	Vodafone	N/A	YWJ35776

### Step 2

Find the asset(s) you want to update. Filters can be used to assist with this.

### Step 3

Select the mobile number(s) you wish to update.

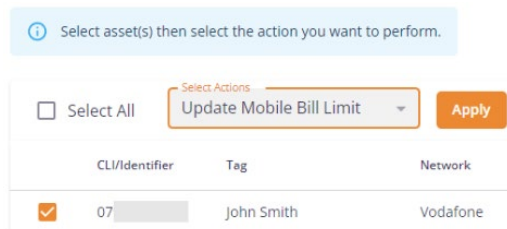


This screenshot shows the same interface as Step 2, but with the "Update Mobile Bill Limit" action selected in the "Select Actions" dropdown menu. The "Select All" checkbox is now checked, and the table below shows the first asset selected with a checkmark.

CLI/Identifier	Tag	Network
<input checked="" type="checkbox"/> 07 [redacted]	John Smith	Vodafone

### Step 4

Select the **Update Bill Limits** action from **Select Actions** then click **Apply**.



This screenshot shows the same interface as Step 3, but with the "Apply" button highlighted in orange. The "Update Mobile Bill Limit" action is still selected in the dropdown menu.

CLI/Identifier	Tag	Network
<input checked="" type="checkbox"/> 07 [redacted]	John Smith	Vodafone

### Step 5

The page will display all your current month's bill limits and next month's bill limits.

### Step 6

If you would like to clear the current month's bill limit, then select the **Clear limits** option and click **Submit**. If you would like to set a new bill limit from next month then select the **Set limit from next month** option, enter your new value, and then click **Submit**.

### Step 7

**Confirm** you understand the change and are happy to proceed. The change will now have been submitted.

You can monitor the change on the History tab within Mobile Management. See the [Check Mobile Change Status](#) guide for more details.

## Block Lost or Stolen SIM

If you have lost your phone or it has been stolen, the Lost/Stolen SIM action allows you to block the SIM and optionally order a new one.

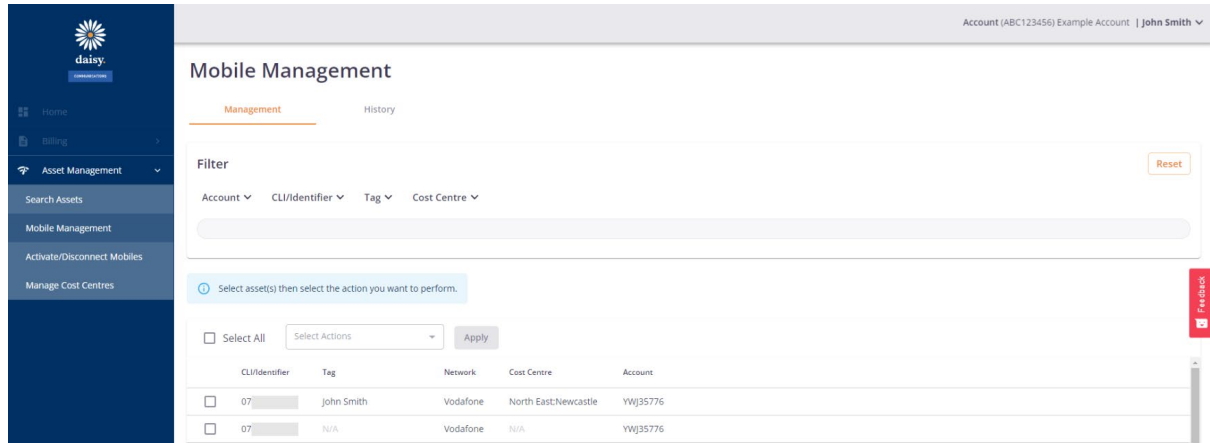
### Step 1

Click the **Asset Management** menu option and then **Mobile Management**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

The page displays all your live mobile services.

## 1.3. Document Classification: Public

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.



The screenshot shows the Daisy Mobile Management interface. The top header displays the account information: "Account (ABC123456) Example Account | John Smith". The main content area is titled "Mobile Management" and has two tabs: "Management" (active) and "History". Below the tabs is a "Filter" section with dropdown menus for "Account", "CLI/Identifier", "Tag", and "Cost Centre", and a "Reset" button. A message box says "Select asset(s) then select the action you want to perform." Below this is a "Select All" checkbox, a "Select Actions" dropdown menu, and an "Apply" button. The table below has columns for "CLI/Identifier", "Tag", "Network", "Cost Centre", and "Account".

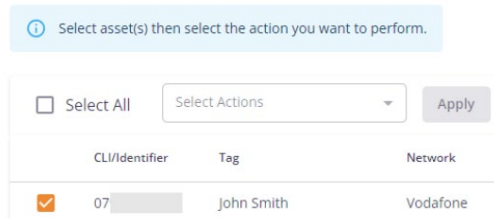
CLI/Identifier	Tag	Network	Cost Centre	Account
<input type="checkbox"/> 07 [redacted]	John Smith	Vodafone	North East:Newcastle	YWJ35776
<input type="checkbox"/> 07 [redacted]	N/A	Vodafone	N/A	YWJ35776

### Step 2

Find the asset(s) you want to update. Filters can be used to assist with this.

### Step 3

Select the relevant mobile number.

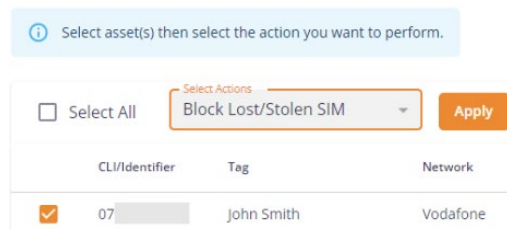


The screenshot shows the "Select asset(s) then select the action you want to perform." message box. Below it is the "Select All" checkbox, the "Select Actions" dropdown menu, and the "Apply" button. The table below has columns for "CLI/Identifier", "Tag", and "Network".

CLI/Identifier	Tag	Network
<input checked="" type="checkbox"/> 07 [redacted]	John Smith	Vodafone

### Step 4

Select the **Block Lost/Stolen SIM** action from **Select Actions** then click **Apply**.



The screenshot shows the "Select asset(s) then select the action you want to perform." message box. Below it is the "Select All" checkbox, the "Select Actions" dropdown menu (highlighted with a red box and containing "Block Lost/Stolen SIM"), and the "Apply" button. The table below has columns for "CLI/Identifier", "Tag", and "Network".

CLI/Identifier	Tag	Network
<input checked="" type="checkbox"/> 07 [redacted]	John Smith	Vodafone

### Step 5

Select the **Apply Stolen bar to SIM** checkbox. A popup will display asking you to confirm you are happy for the bar to be applied, click **Yes**.

The bar request will have been submitted.

Note: bars can take up to 24 hours to fully complete.

### Step 6

If you want to order a new SIM, click the **Order New SIM** button. See the [Order New SIM](#) guide below for more details.

Note: You can monitor the change on the History tab within Mobile Management. See the [Check Mobile Change Status](#) guide for more details.

## Unlock SIM

If you are locked out of your SIM, you may require your PUK code.

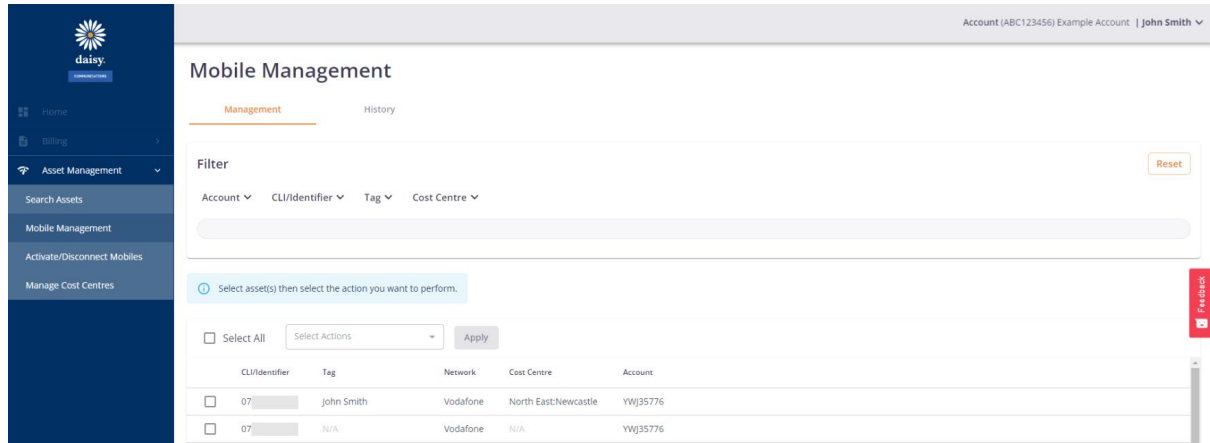
### Step 1

Click the **Asset Management** menu option and then **Mobile Management**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

The page displays all your live mobile services.

## 1.3. Document Classification: Public

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.



The screenshot shows the Daisy Mobile Management interface. The top header displays the account information: "Account (ABC123456) Example Account | John Smith". The main content area is titled "Mobile Management" and has two tabs: "Management" (active) and "History". Below the tabs is a "Filter" section with dropdown menus for "Account", "CLI/Identifier", "Tag", and "Cost Centre", and a "Reset" button. A message box says "Select asset(s) then select the action you want to perform." Below this is a "Select All" checkbox, a "Select Actions" dropdown menu, and an "Apply" button. The table below has columns for "CLI/Identifier", "Tag", "Network", "Cost Centre", and "Account".

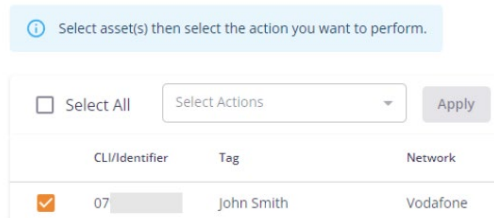
CLI/Identifier	Tag	Network	Cost Centre	Account
<input type="checkbox"/> 07	John Smith	Vodafone	North East:Newcastle	YWJ35776
<input type="checkbox"/> 07	N/A	Vodafone	N/A	YWJ35776

### Step 2

Find the asset(s) you want to update. Filters can be used to assist with this.

### Step 3

Select the relevant mobile number.

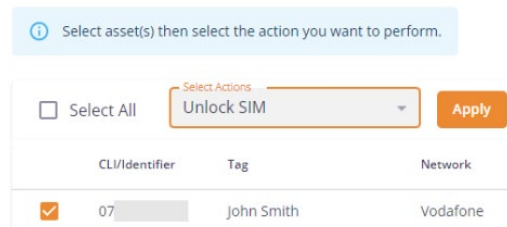


The screenshot shows the "Select Actions" dropdown menu open, displaying "Unlock SIM" as the selected option. The "Apply" button is highlighted in orange. The table below has columns for "CLI/Identifier", "Tag", and "Network".

CLI/Identifier	Tag	Network
<input checked="" type="checkbox"/> 07	John Smith	Vodafone

### Step 4

Select the **Unlock SIM** action from **Select Actions** then click **Apply**.

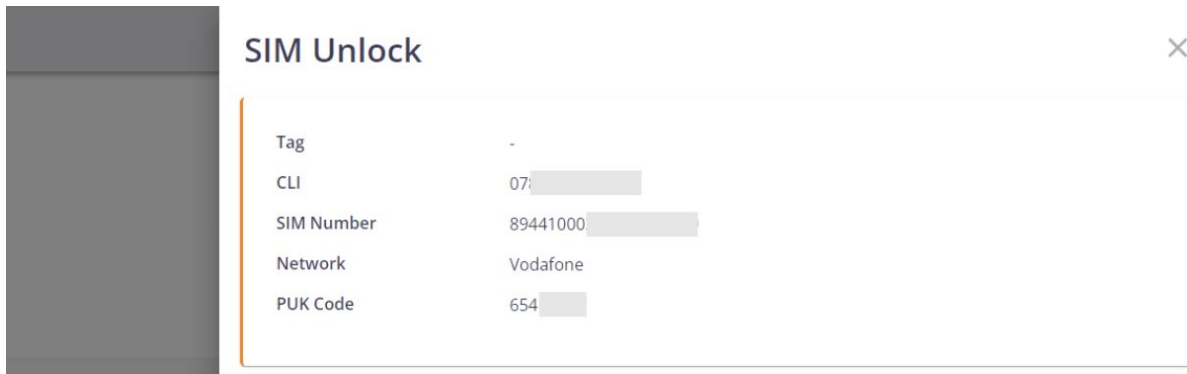


The screenshot shows the "Apply" button highlighted in orange. The table below has columns for "CLI/Identifier", "Tag", and "Network".

CLI/Identifier	Tag	Network
<input checked="" type="checkbox"/> 07	John Smith	Vodafone

### Step 5

The PUK code will be displayed on the screen.



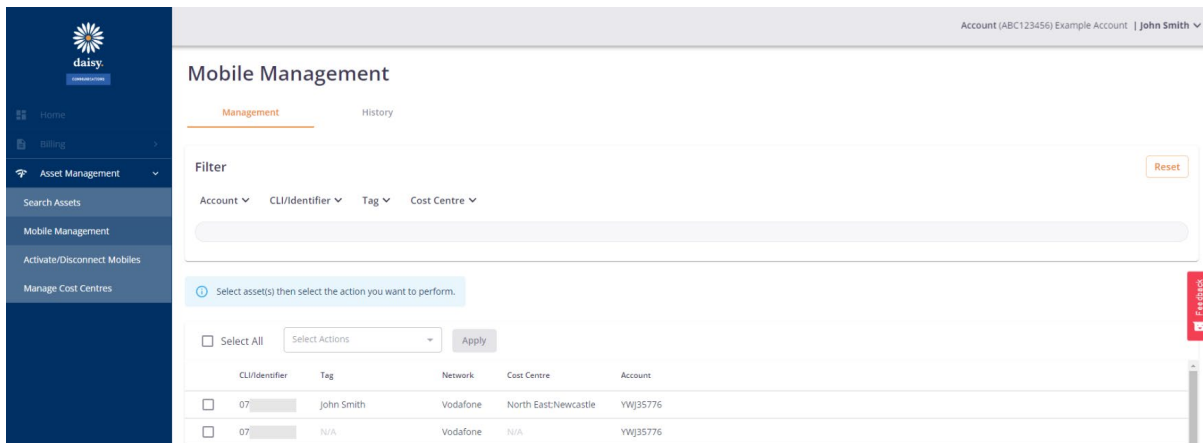
## Order New SIM

### Step 1

Click the **Asset Management** menu option and then **Mobile Management**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

The page displays all your live mobile services.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.



### Step 2

Find the asset(s) you want to update. Filters can be used to assist with this.

### Step 3

Select the relevant mobile number.

### 1.3. Document Classification: Public

Select asset(s) then select the action you want to perform.

Select All    Select Actions    Apply

CLI/Identifier	Tag	Network
<input checked="" type="checkbox"/> 07 [redacted]	John Smith	Vodafone

#### Step 4

Select the **Order New SIM** action from **Select Actions** then click **Apply**.

Select asset(s) then select the action you want to perform.

Select All    **Order New SIM**    Apply

CLI/Identifier	Tag	Network
<input checked="" type="checkbox"/> 07 [redacted]	John Smith	Vodafone

#### Step 5

Enter the SIM Card Type and Delivery Address, then click **Submit**.

### Order SIM Card

CLI/Identifier	Account	Tag	Current SIM Number	Current SIM Type
07 [redacted]	[redacted]		8944100[redacted]	

Select SIM Card Type

Select

Total Price  
£0.00

Delivery Address

Address Line 1

Address Line 2

Address Line 3

City

County

Postcode

Country  
United Kingdom

Email

#### Step 6

The request will have been submitted. SIM cards are sent by Royal Mail 2nd class delivery. Please allow between 2-5 days.

## Activate Dispatched SIM

If you have ordered a SIM with us, you will need to activate it once it arrives.

### Step 1

Click the **Asset Management** menu option and then **Activate/Disconnect Mobiles**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

The page displays all mobile numbers awaiting activation.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.

Mobile Disconnections/SIM Activations						
Activate			Disconnect			
CLI/Identifier	Tag	Network	SIM Number	New SIM Number	New SIM Type	
07 [redacted]	N/A	N/A	N/A	8944100 [redacted]	Triple SIM	Pending
07 [redacted]	N/A	N/A	N/A	8944100 [redacted]	Triple SIM	Pending
07 [redacted]	N/A	Vodafone	8944100 [redacted]	8944100 [redacted]	E-SIM	Activate

### Step 2

Find the SIM you wish to activate, then click **Activate**.

Note: the process can take up to 24 hours to complete with the network.

## Mobile Disconnection Requests

If you have any active mobile disconnections, including PAC or STAC requests, you can see them in the Mobile Disconnection page.

### Step 1

Click the **Asset Management** menu option and then **Activate/Disconnect Mobiles**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

### Step 2



Click the **Disconnect Mobiles** tab. You will see all active mobile disconnections including PAC codes, STAC codes and expiry dates.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.

Disconnect Mobiles

Activate SIMs      **Disconnect Mobiles**

The following mobile numbers have active disconnection requests pending

CLI/Identifier	PAC Code	STAC Code	Expiry Date	Auto Switch	Porting Date	Early Termination Fee	
07		N/A	2022-10-19	Yes	N/A	£0.00	<b>Cancel</b>

### Step 3

To cancel a disconnection, click the relevant **Cancel** button.

## Bundle Alerts

We may contact you if you have nearly reached or have reached your bundle allowance on your mobile. This is to help prevent bill shock and also put steps in place going forward to help prevent it from happening again.

Note: in certain circumstances that are beyond our control, such as delays in call data being received from the network, overall charges may exceed the set limit and are still liable to be paid for under your terms & conditions. Any additional Data usage will be charged at the standard out of bundle rate of 7p per MB (UK usage only).

So what will happen?

- An SMS will be sent to the mobile number when usage reaches 80% & 100% of the bundle allowance.
- An email will be sent to the billing contact when any mobile number reaches 100% of the bundle allowance.
- An email will also be sent to the billing contact when the usage of any Account Level Bundle reaches 80% & 100%.

These alerts include data, minutes and text bundles.

You can opt in/out of bundle notifications by following the below steps:

### Step 1

Click the **Alerts** menu option and then **Bundle Alerts**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

The page displays all your mobile numbers.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.

#### Bundle Alerts

**When we notify you**  
An SMS will be sent to the mobile number when usage reaches 80% & 100% of the bundle allowance.  
An email will be sent to the billing contact when any mobile number reaches 100% of the bundle allowance.  
An email will also be sent to the billing contact when the usage of any Account Level Bundle reaches 80% & 100%.

**We will use reasonable endeavours to notify you as soon as we become aware that the mobile number has breached each threshold. However, in certain circumstances that are beyond our control, such as delays in call data being received from the network, there may be delays in our alert which may result in you exceeding your allowance. Any charges as a result are still liable to be paid for under your terms & conditions.**

**Individual** Account

CLI/Identifier ▾

Save Changes

Enable All Disable All

Number	Tag	Cost Centre	
07	tag	level 1   level 2   level 3	<input checked="" type="checkbox"/> Enabled
07	enter tag here	N/A	<input type="checkbox"/> Disabled

#### Step 2

**Enable** to get notified and **Disable** if you don't want to be notified. Please note this will only happen for the specific number. To opt in/out of all notifications, simply select the **Enable All** or **Disable All** buttons.

If you have any account level bundles, then you can enable or disable them on the **Account** tab.

#### Step 3

Click **Save Changes**.

## Bill Limit Alerts

If you want to be alerted when you have reached or nearly reached you bill limit, then you can enable bill limit alerts.

#### DEFAULT SETTINGS FOR ACCOUNT

If you want to set the same bill limit alert settings for all your eligible mobile numbers, then this can be set in the Account tab.

#### Step 1

Click the **Alerts** menu option and then **Bill Limit Alerts**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.

### Step 2

Click the **Account** tab.

Bill Limit Alerts

CLI Account

Bill Limit notification settings for account [redacted]  
Notifications for this bill limit will be automatically sent to the mobile number by SMS. You can add additional notifications below.  
Early warning 80%, Late warning 90%, Limit breached 100%

SMS alerts sent to mobile number:

Email alerts sent to:  Add Email

Save

### Step 3

Click the relevant alert method **SMS** and/or **Email** and then enter the **mobile number** or **email address** you want the notification to be sent to.

### Step 4

Click **Save**.

## SPECIFIC SETTINGS FOR MOBILE NUMBER

If you want the bill limit alert setting for a specific mobile number to be different to the default settings, then follow the below.

### Step 1

Click the **Alerts** menu option and then **Bill Limit Alerts**. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

The page displays all your mobile numbers.

Note: Verify that you are on the correct account by checking the level and account in the header as billing details are not visible at group or company level. See the 'Switch Accounts' section above for details.

### Step 2

While still on the **CLI** tab, find the mobile number you wish to update then click **Edit**.

### Bill Limit Alerts

CLI Account

**Bill Limit notification settings for CLI 07**  
Notifications for this bill limit will be automatically sent to the mobile number by SMS. You can add additional notifications below.  
Early warning 80%. Late warning 90%. Limit breached 100%.

SMS alerts sent to mobile number:

Email alerts sent to:  Add Email

### Step 3

Click the relevant alert method **SMS** and/or **Email** and then enter the **mobile number** or **email address** you want the notification to be sent to.

### Step 4

Click **Save**.

## Check Mobile Change Status

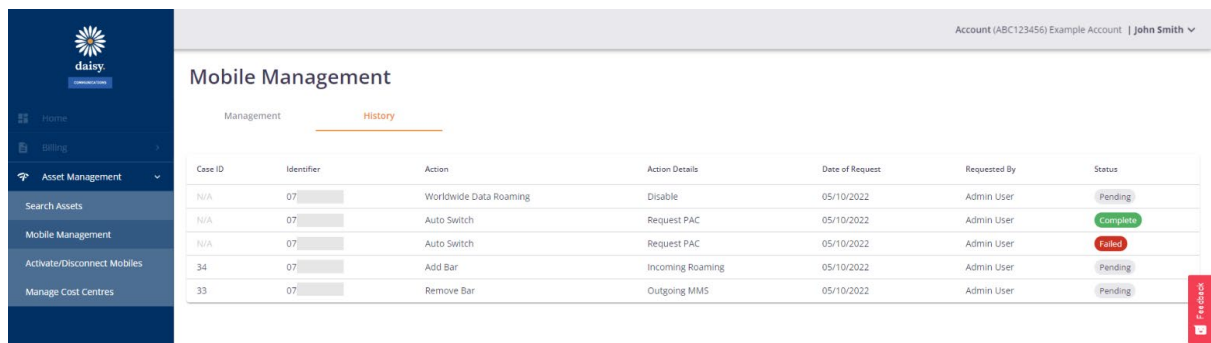
The History tab on Mobile Management displays all your mobile management activity where you can also see the status of changes you have made.

### Step 1

Click the **Asset Management** menu option and then **Mobile Management**.

### Step 2

Click the **History** tab.



Account (ABC123456) Example Account | John Smith

#### Mobile Management

Management **History**

Case ID	Identifier	Action	Action Details	Date of Request	Requested By	Status
N/A	07	Worldwide Data Roaming	Disable	05/10/2022	Admin User	Pending
N/A	07	Auto Switch	Request PAC	05/10/2022	Admin User	Complete
N/A	07	Auto Switch	Request PAC	05/10/2022	Admin User	Failed
34	07	Add Bar	Incoming Roaming	05/10/2022	Admin User	Pending
33	07	Remove Bar	Outgoing MMS	05/10/2022	Admin User	Pending