Welcome to your new MyAccount

daisy.
COMMUNICATIONS

WELCOME TO
MyAccount

Contents

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. 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%3DKvw5D0fdfdfgNxzoQy1OejMx93y_4UrafgfdU%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. 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.

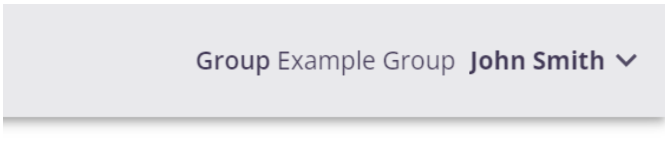
Switching Accounts/Groups

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

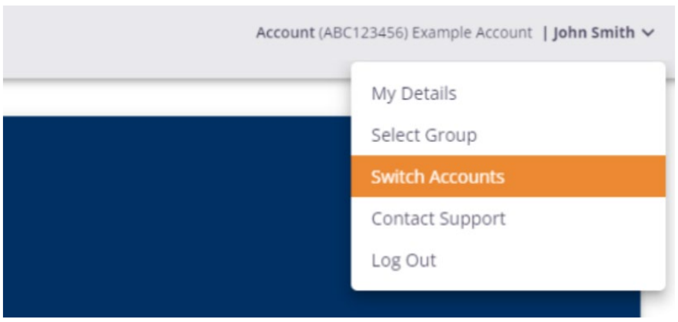
Step 1

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

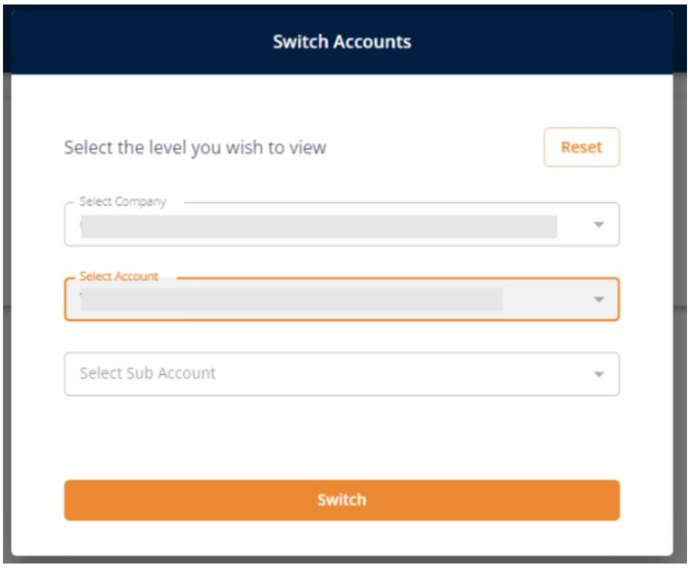
To switch to another level or account within the same organisation, click the top right menu and then click **Switch Accounts**.



Step 3

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

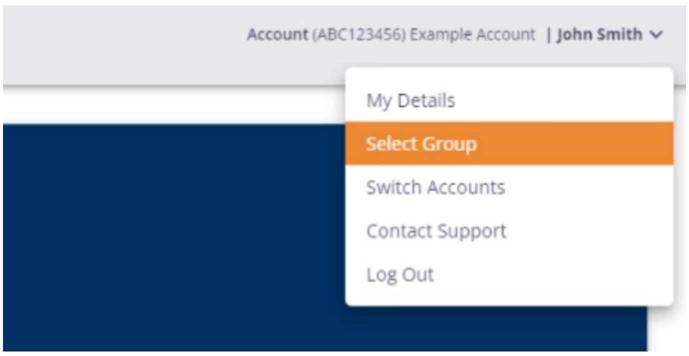
Note: Some fields may not display if they are irrelevant for you, such as the 'Sub Account' field if the account has no sub accounts.



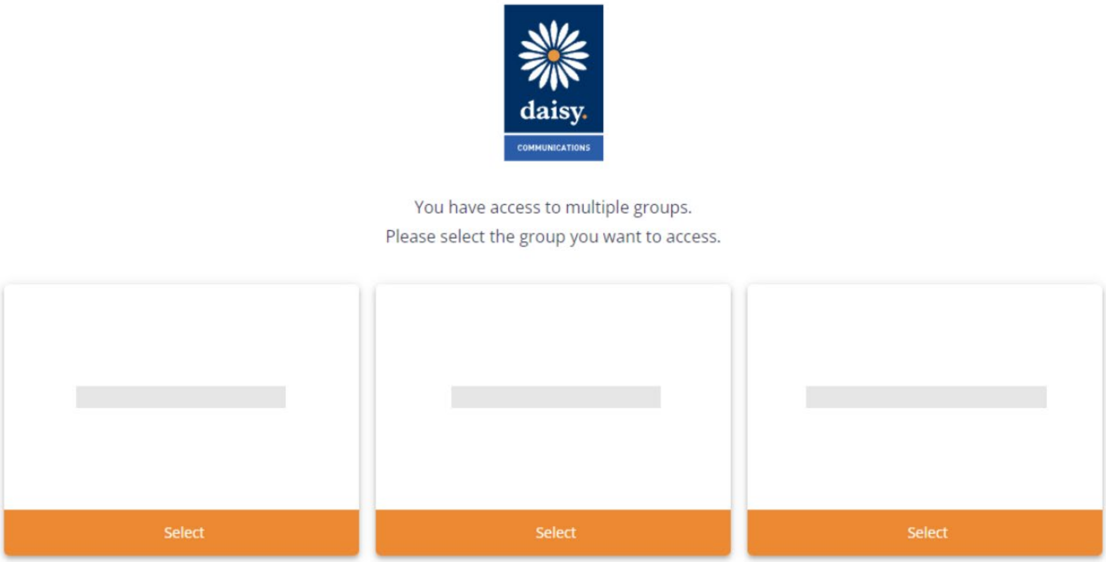
Step 4
After clicking 'Switch', the header will update to the level you are now viewing, all MyAccount pages will display data for the selected account and changes you make will be applied to it.

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.



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

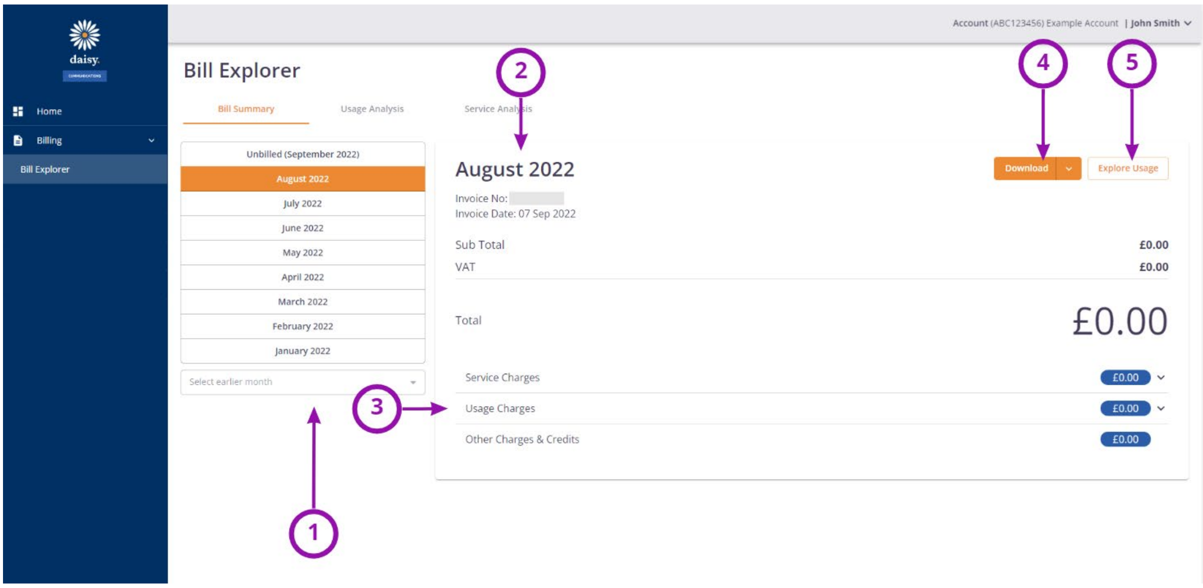
The New MyAccount's Bill Explorer offers powerful search, filtering, customisation and exporting of your bill data. This guide will take you through how it is used.

Bill Summary

Step 1

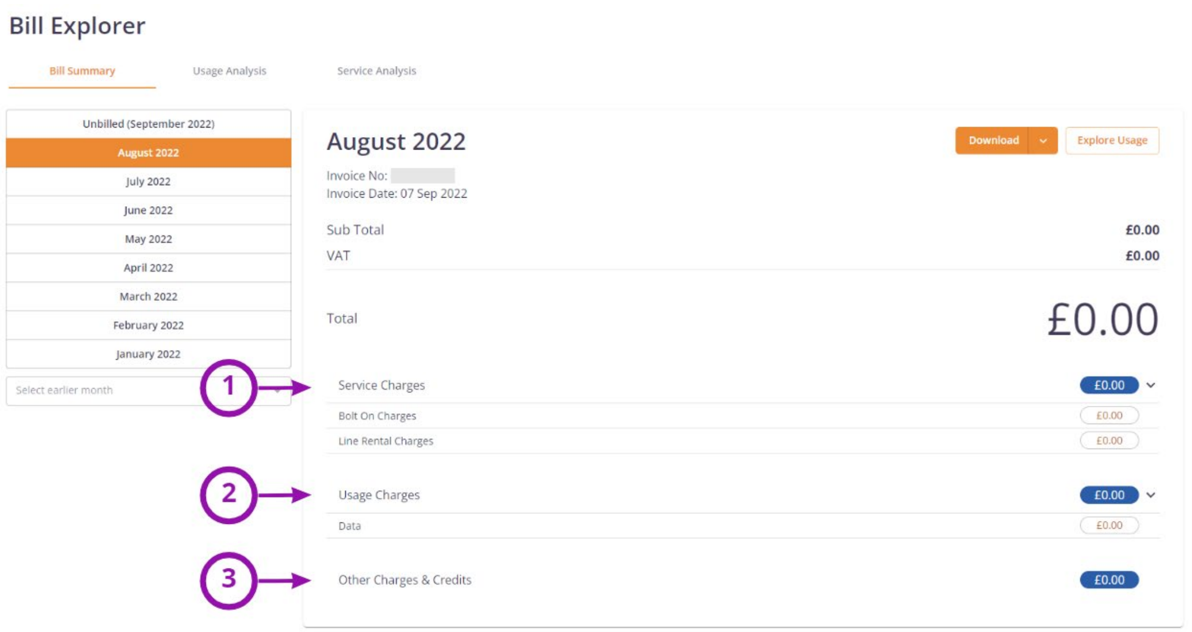
By selecting Bills and then Bill Explorer from the left-hand menu, you will be taken to the Bill Explorer section.

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.



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.



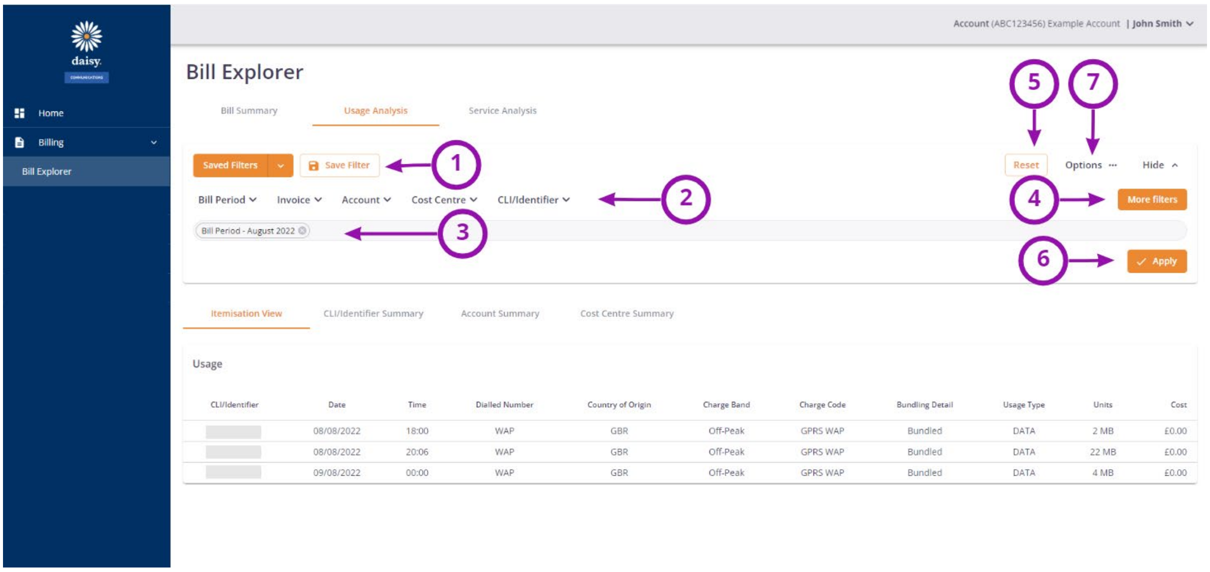
1	Service Charges – total service charges along with a breakdown by charge category. Each total is clickable, allowing you to view the data that makes up the totals.
2	Usage Charges – total usage charges along with a breakdown by usage type. Each total is clickable, allowing you to view the data that 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.

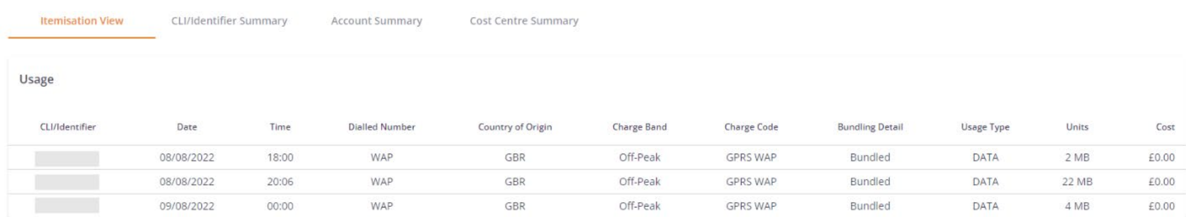
Note: Remember to click the 'Apply' button after you've made changes to your filters.



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

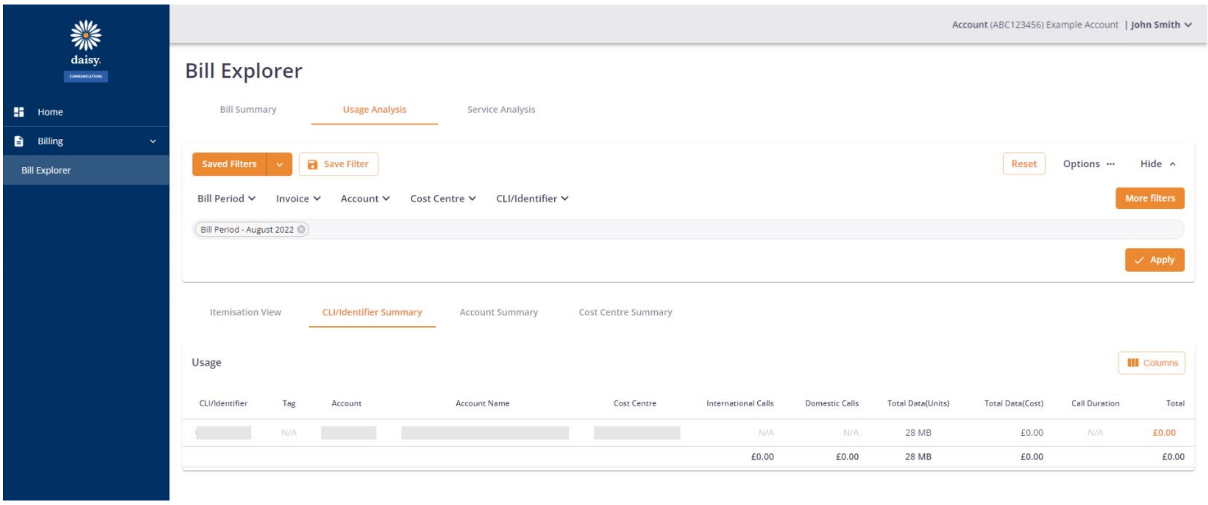
The itemisation view displays all usage records in an infinite scrolling view



CLI/IDENTIFIER SUMMARY VIEW

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

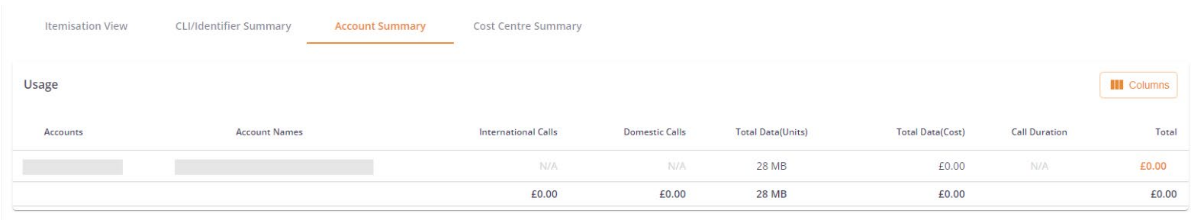
Various additional columns are available and can be added using the column picker. Clicking a total will display the usage that makes up the total.



Account Summary View

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

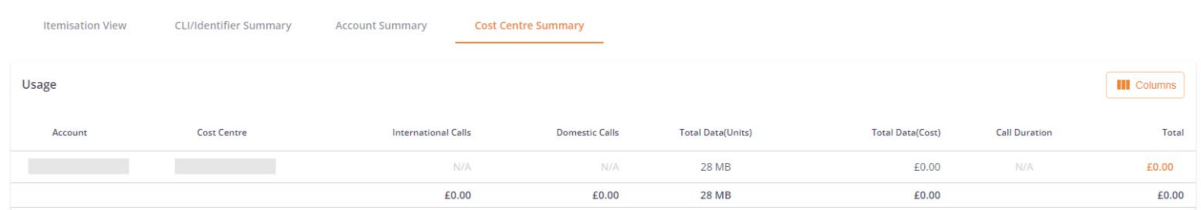
Much like the CLI/Identifier summary, there are additional columns of data that are available and can be added using the column picker. Clicking a total will display the usage that makes up the total.



Cost Centre Summary View

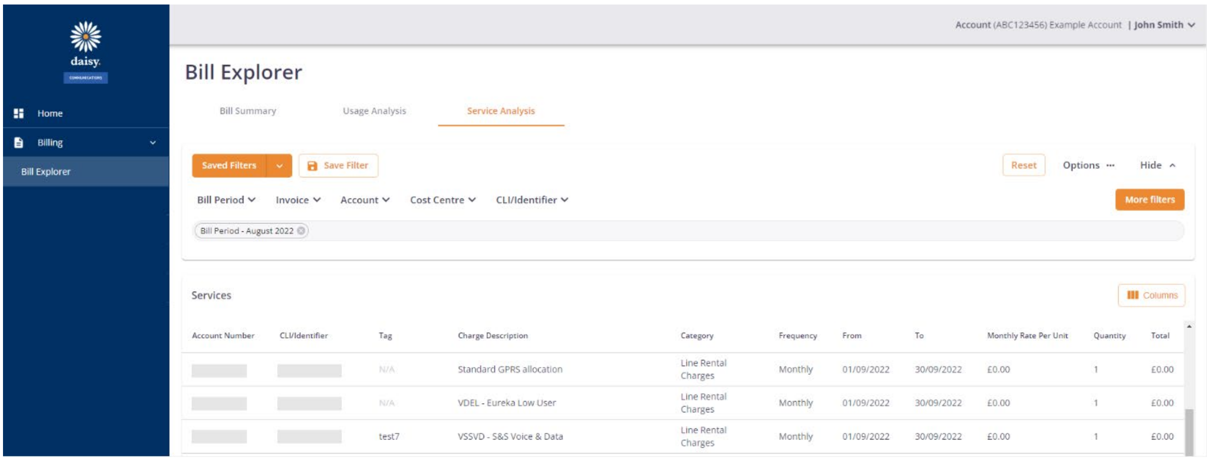
The Cost Centre Summary view summarises all the resulting data by Cost Centre.

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.



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.



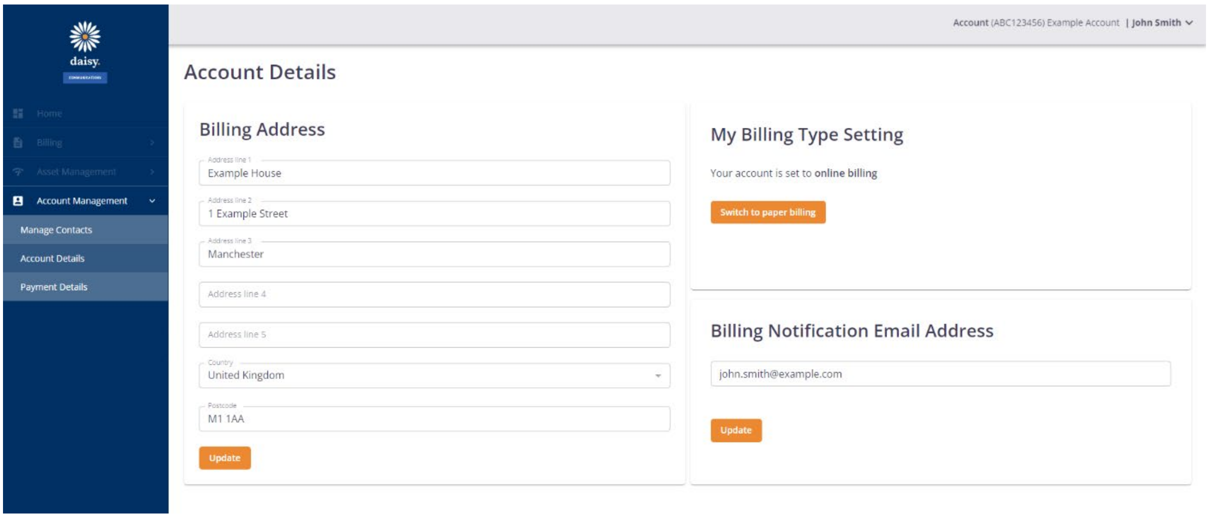
Account Management

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.



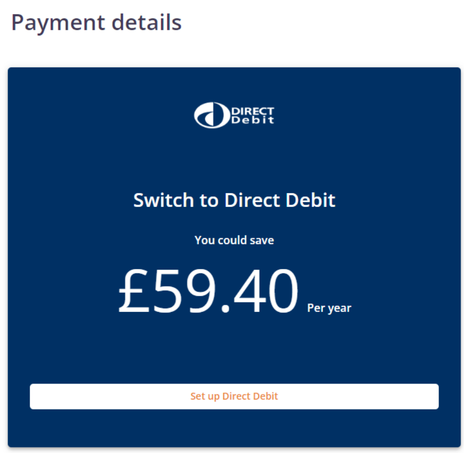
Step 2
You can update your billing address on this screen as well the bill delivery method (paper bill or online bill) and the email that is notified when your bill is ready.

Manage Direct Debit Details

Set Up Direct Debit

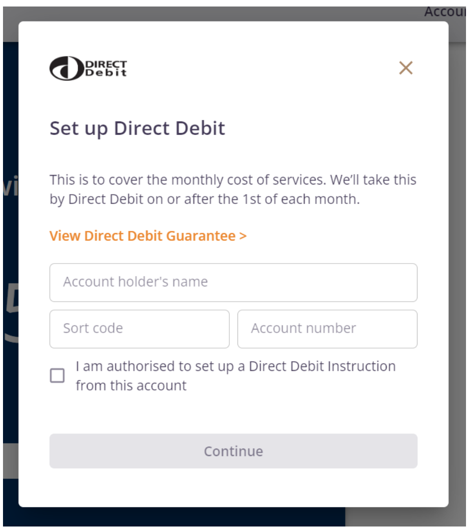
Step 1

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.



Step 2

Click the **Set up Direct Debit** button



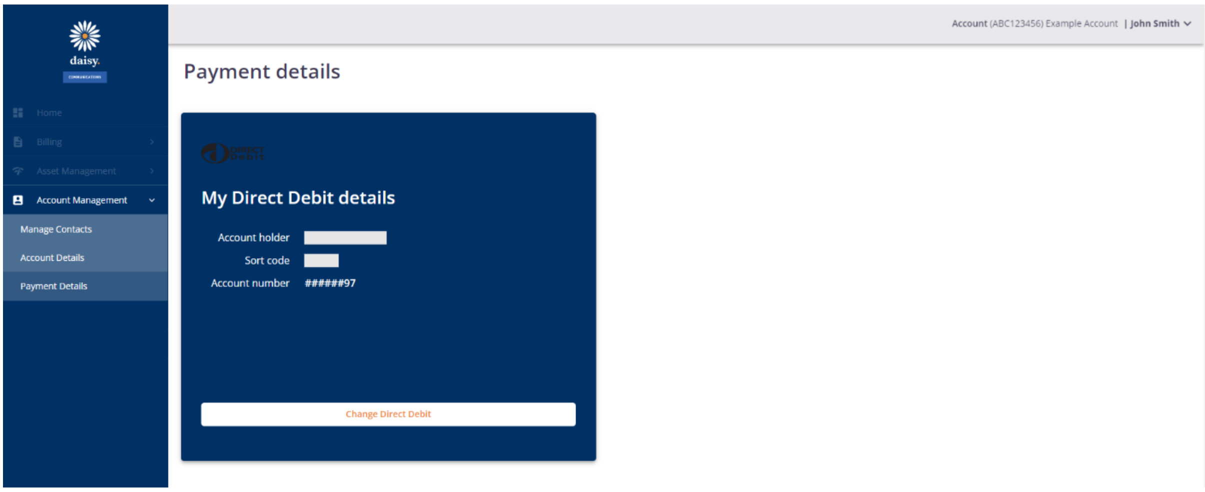
Step 3

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.



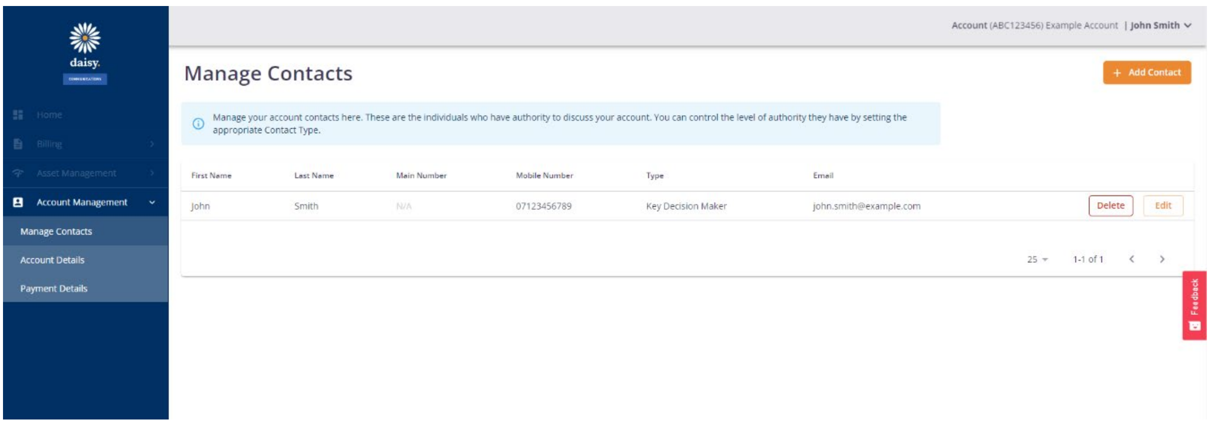
Step 2
Click the 'Change Direct Debit' button, add new bank details, and then save.

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.



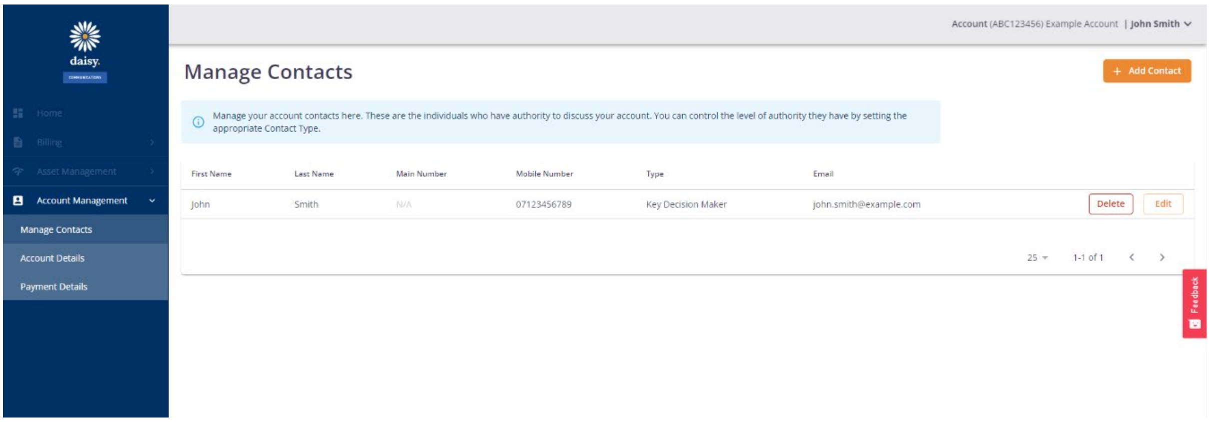
Step 2

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

Update a Contact

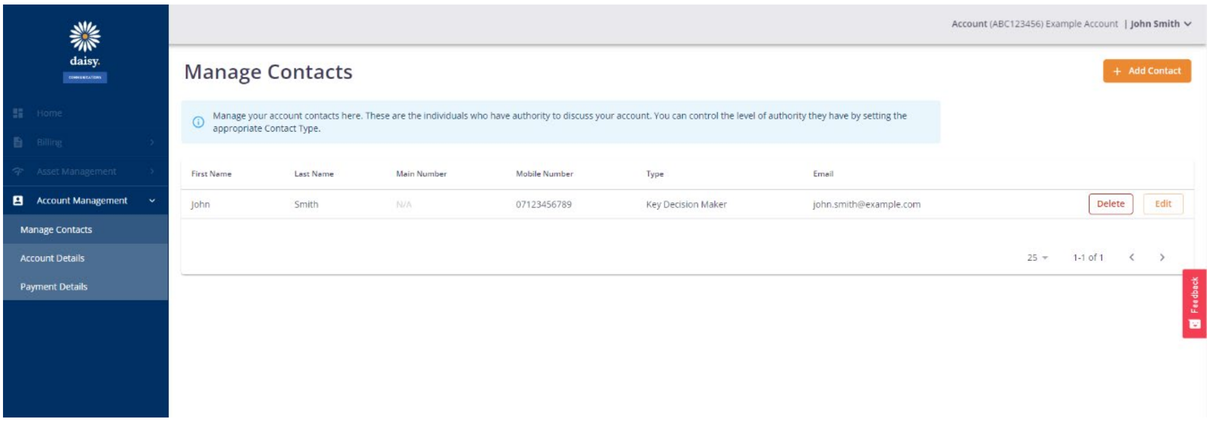
Step 1

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.



Step 2

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



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

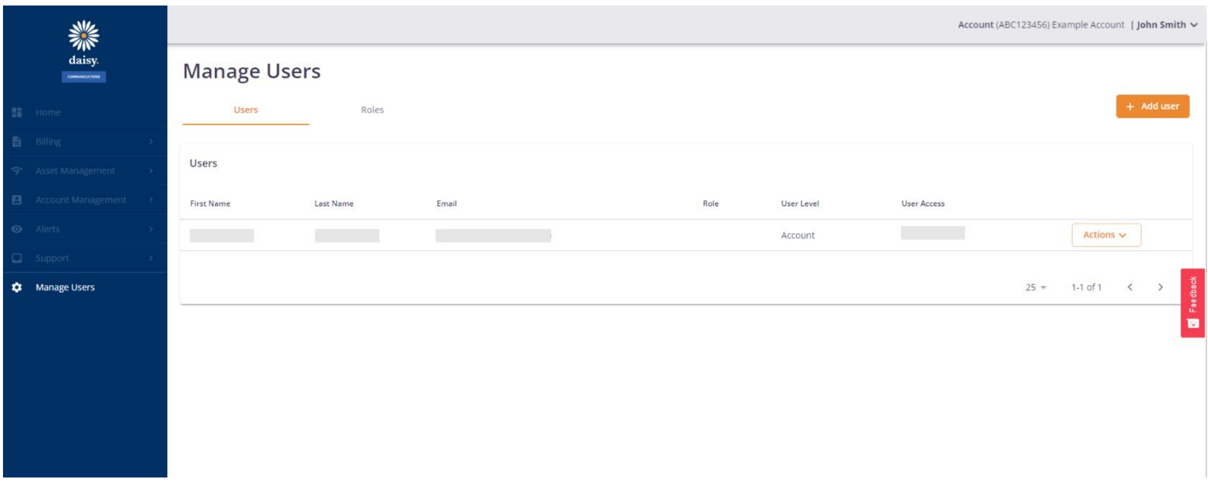
Click the **Manage Users** menu option. If you do not see these in the left-hand menu, please contact your administrator as you do not have the required permission.

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.

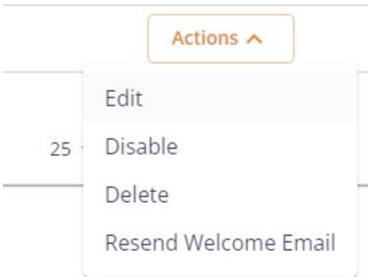
Note: if you switch to another level using the Account Switcher, the list will reflect the level you have switched to.



View/Edit a User

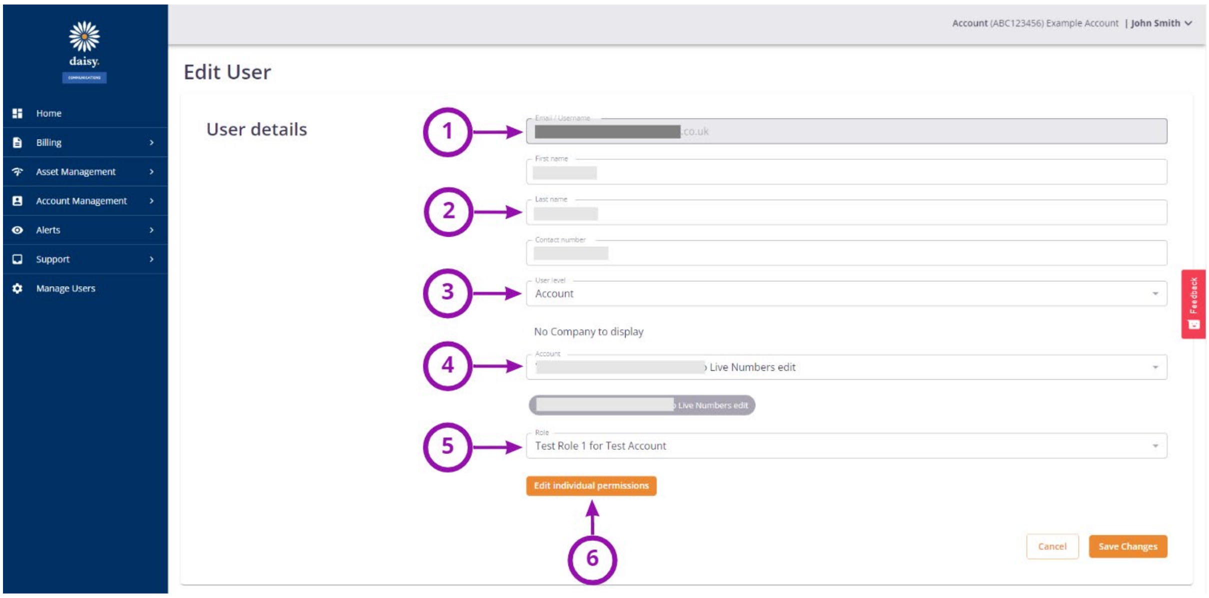
Step 1

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.



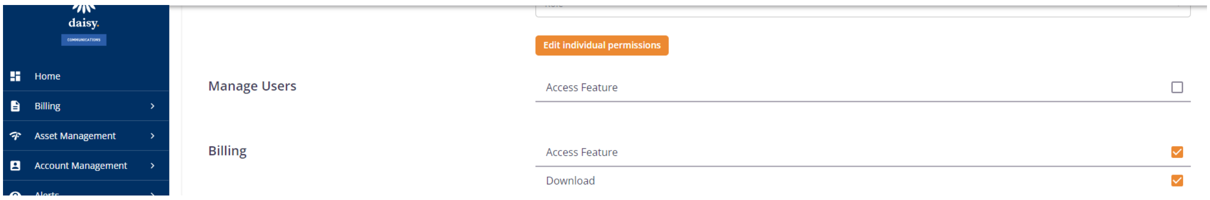
1	Email address – the email address will be unique in our authentication system. This means you cannot use the same email address twice within the same Group/Organisation. When adding an existing user to another Group, the user will have access to the new Group using their existing credentials, however, 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.

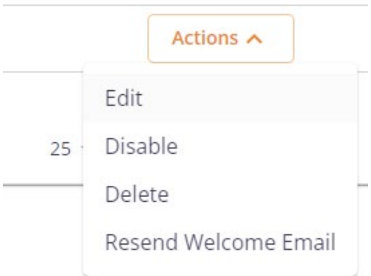
Step 2
After populating the fields, click **Submit**. The new user will receive an email allowing them to complete the registration process.

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.

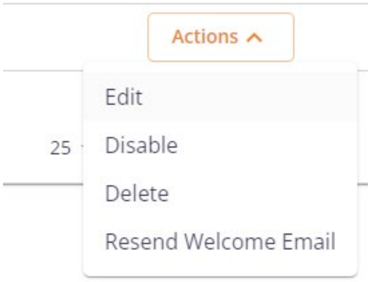
Step 3

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.

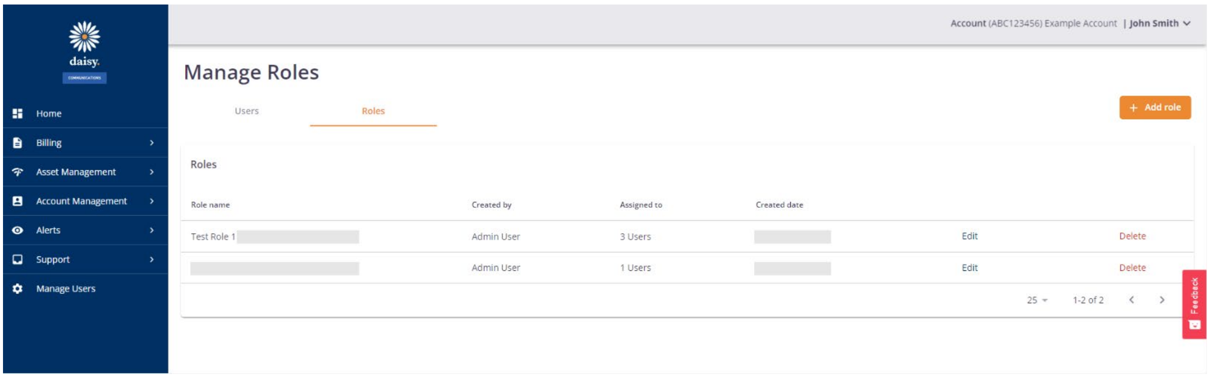
Manage Roles

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

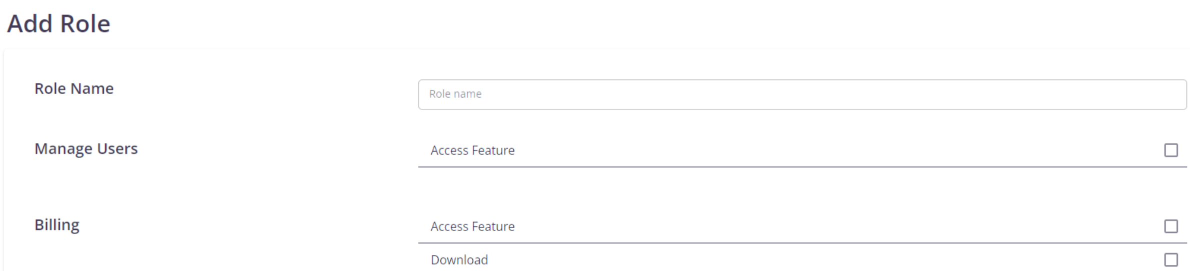
Step 1

Click the **Manage Users** menu item the 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.



Step 3

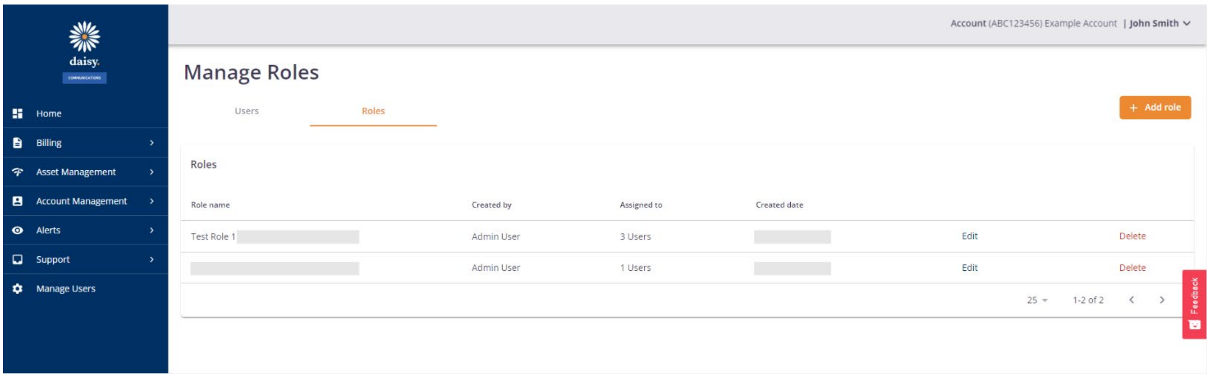
Give the role a name and set its permissions, then click **Submit.** You will have now created a role which can be applied to any user

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.

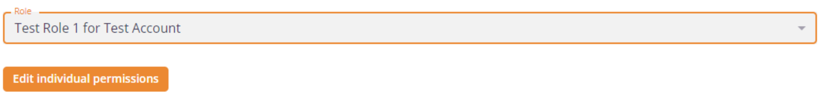
Step 1

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



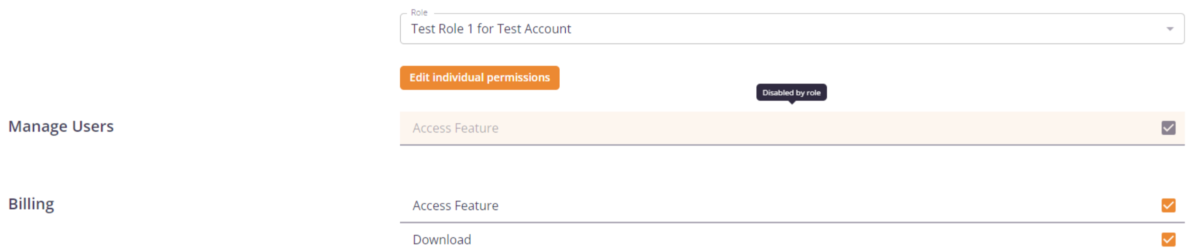
Step 2

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.

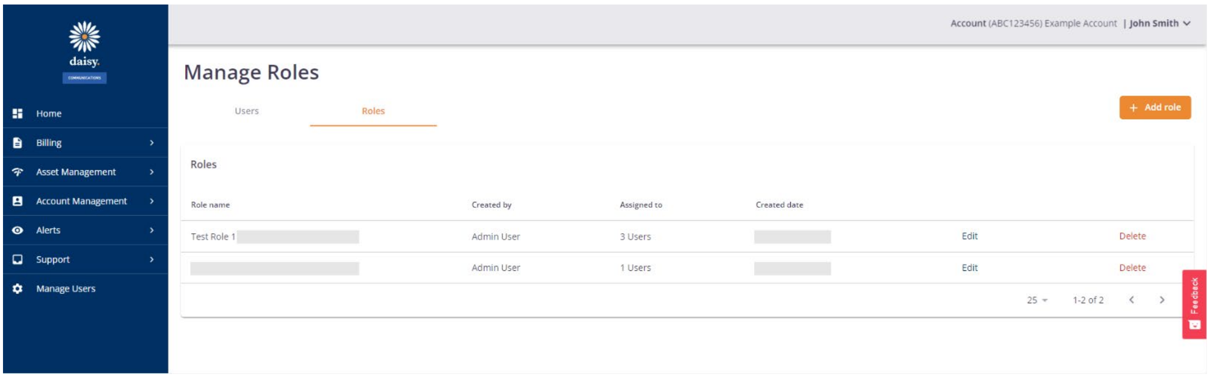
Step 5

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

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.



Step 2

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

Step 3

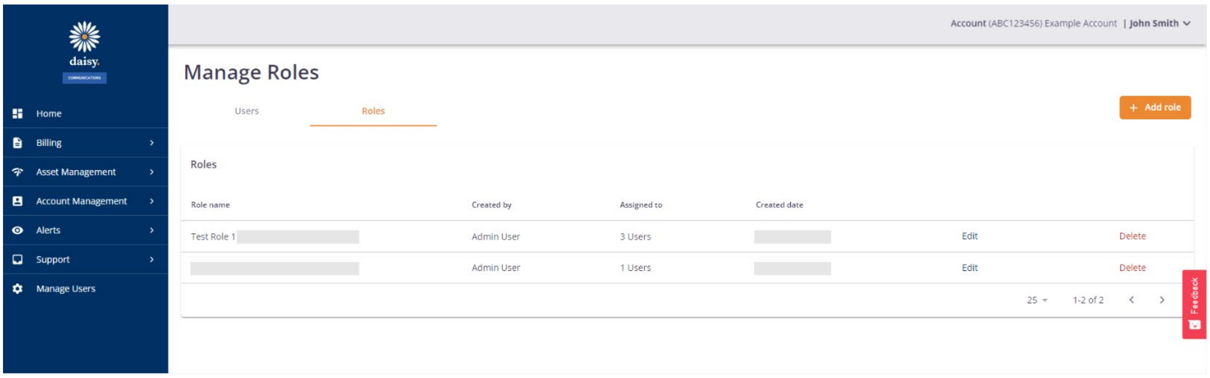
Click **Save Changes.** The changes will be applied to all users of the role.

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.



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.

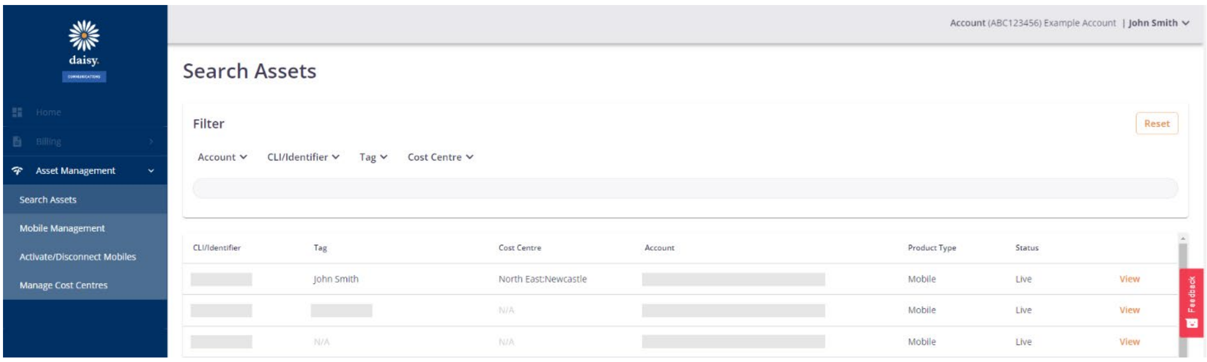
Step 1

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.

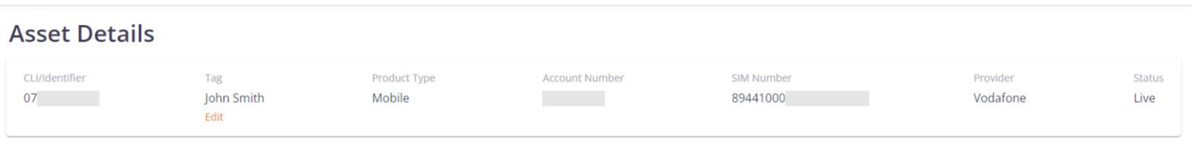
Step 2

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.



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.



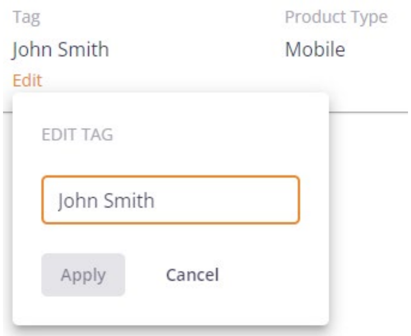
Update Tag/Username

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.

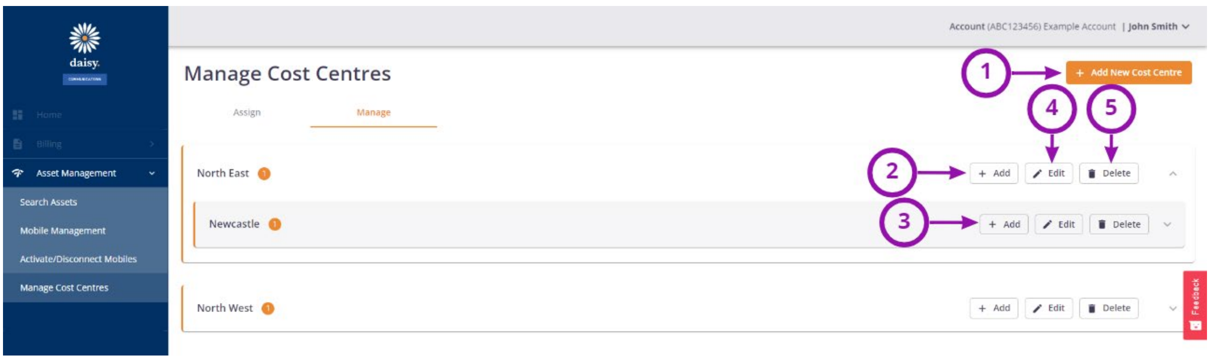
Step 3
The **Tag** field will display the current tag/username which you can update using the **Edit** button.



Create Cost Centres

Cost centres allow you to organise and group your charges. A report providing a breakdown of you 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.

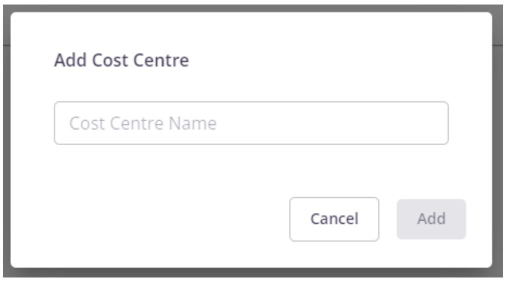


1	Add a new top level cost centre
2	Add a level 2 cost centre, which is a cost centre within the selected cost centre

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 the click **Add**. The new cost centre will appear on the page.



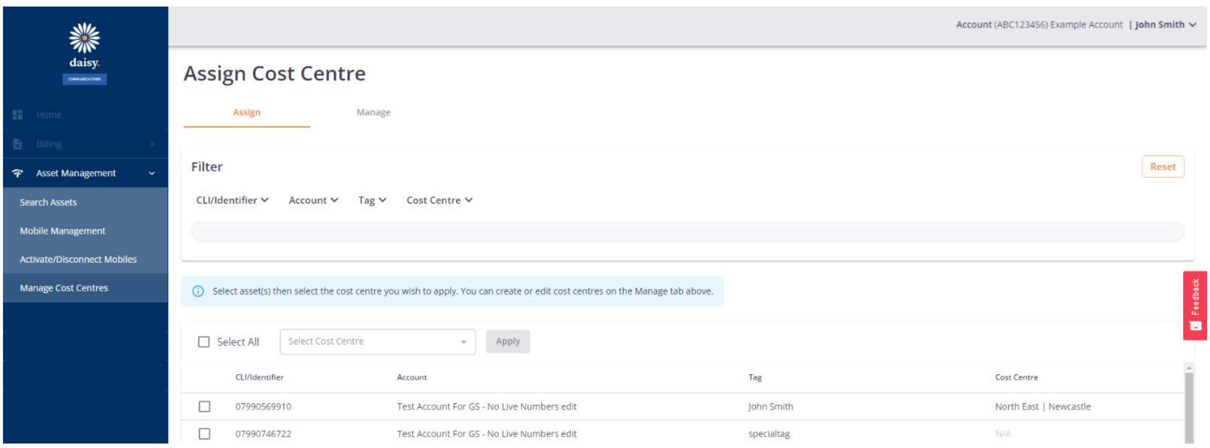
Assign Cost Centre

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.

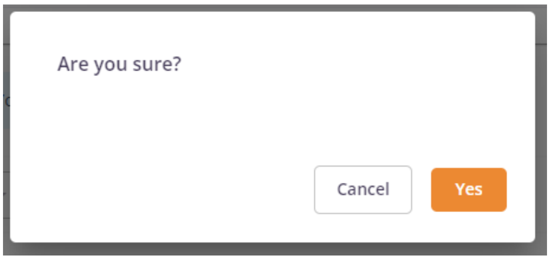


Step 3

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**.

Step 4

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



Mobile Management

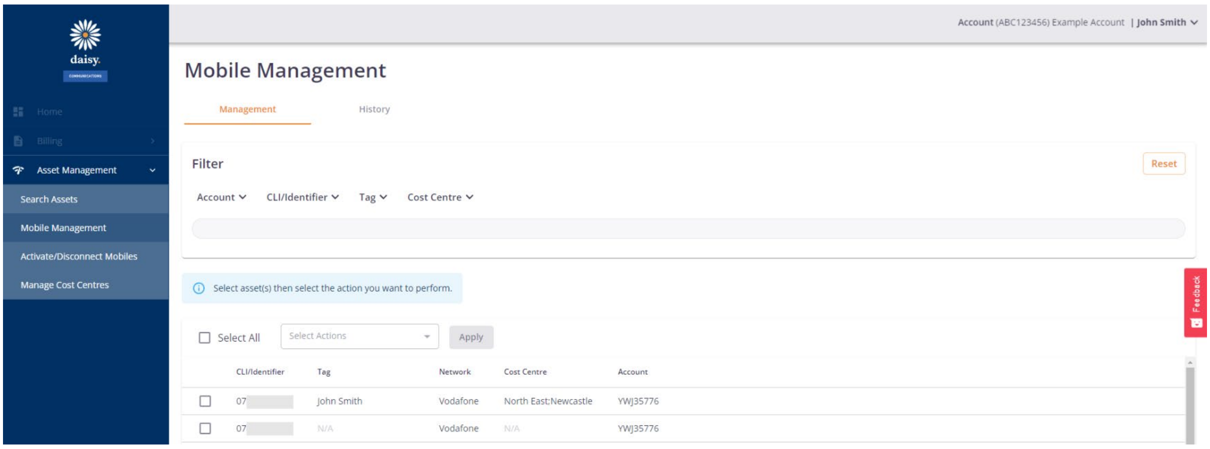
Manage your mobile bars, SIMs and more.

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.

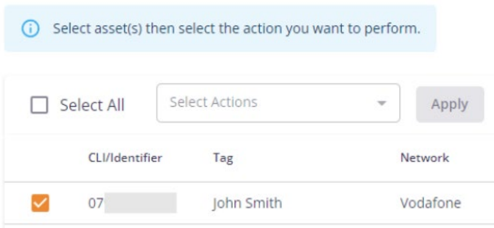
The page displays all your live mobile services.

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.



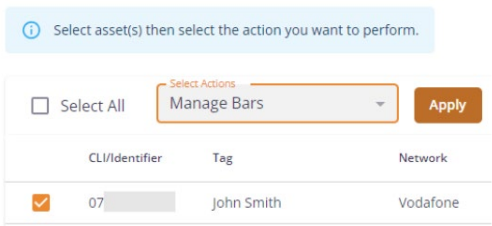
Step 2
Find the asset(s) you want to update. Filters can be used to assist with this.

Step 3
Select the mobile number(s) you wish to update.



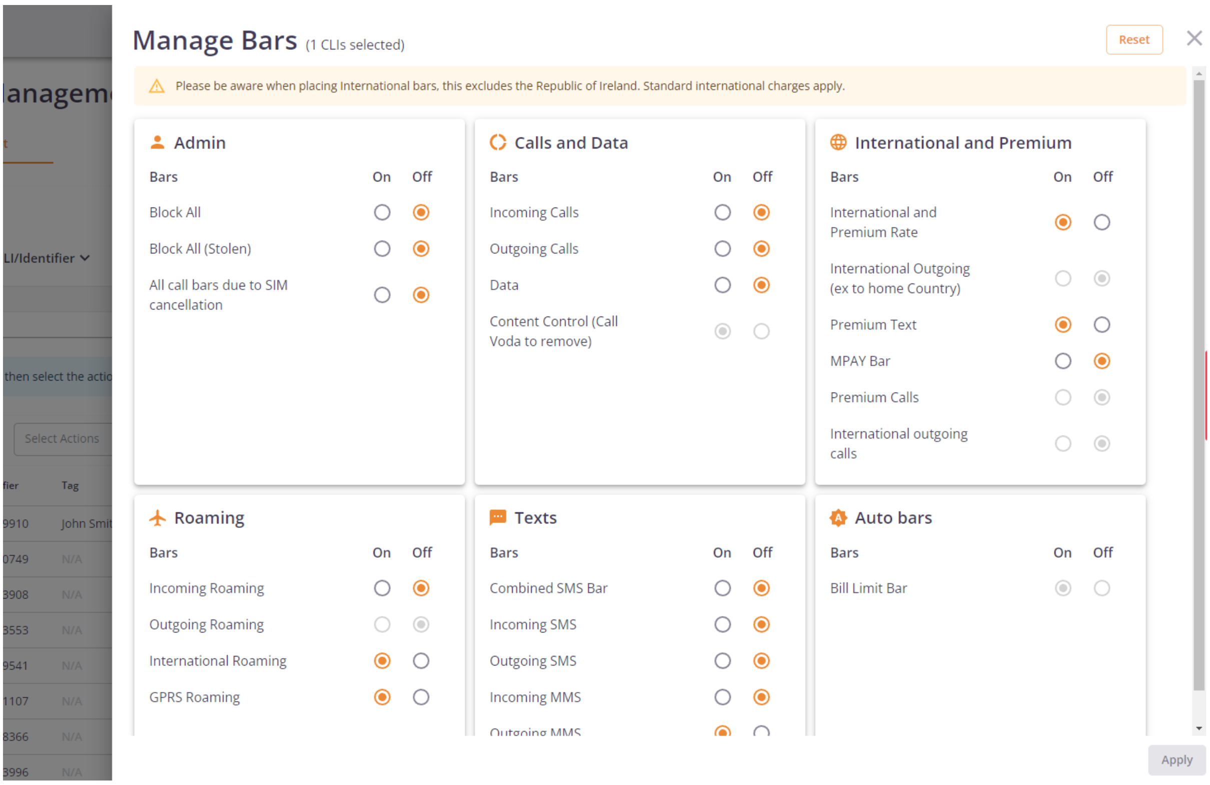
Step 4

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



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**.

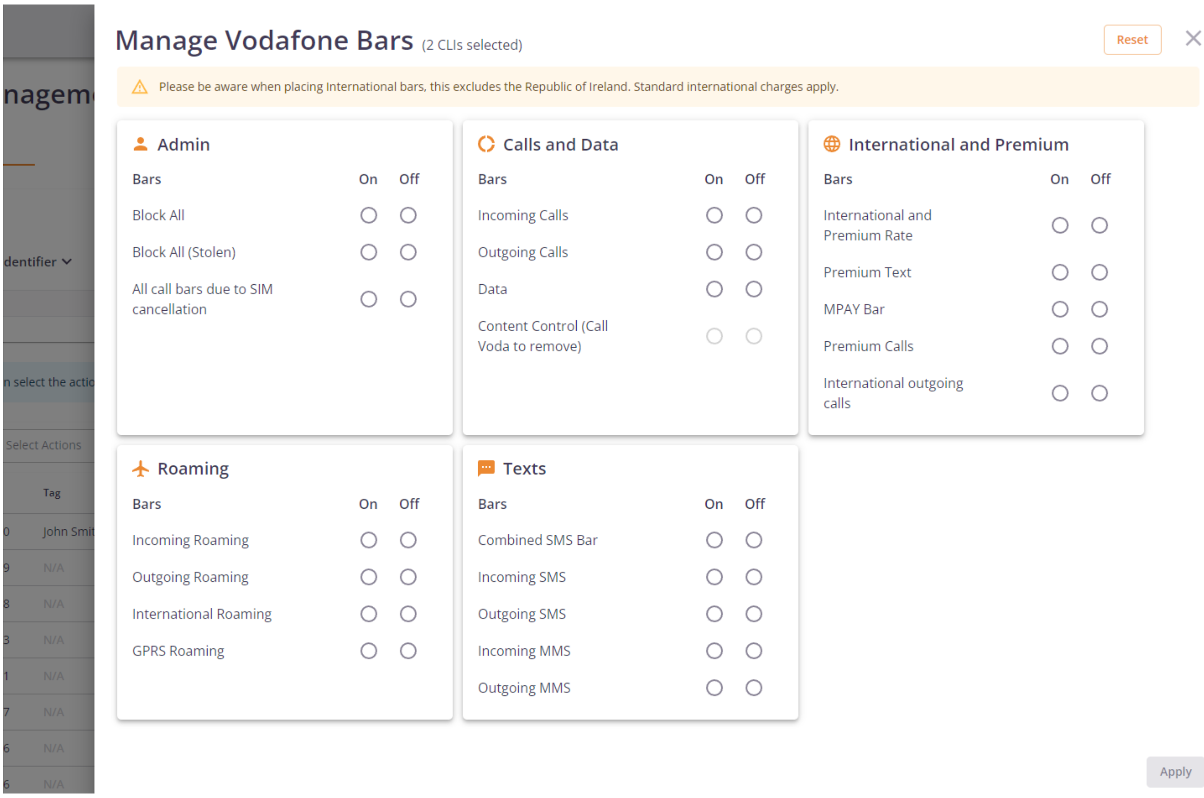


Step 5b – where more than one number was selected

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**.

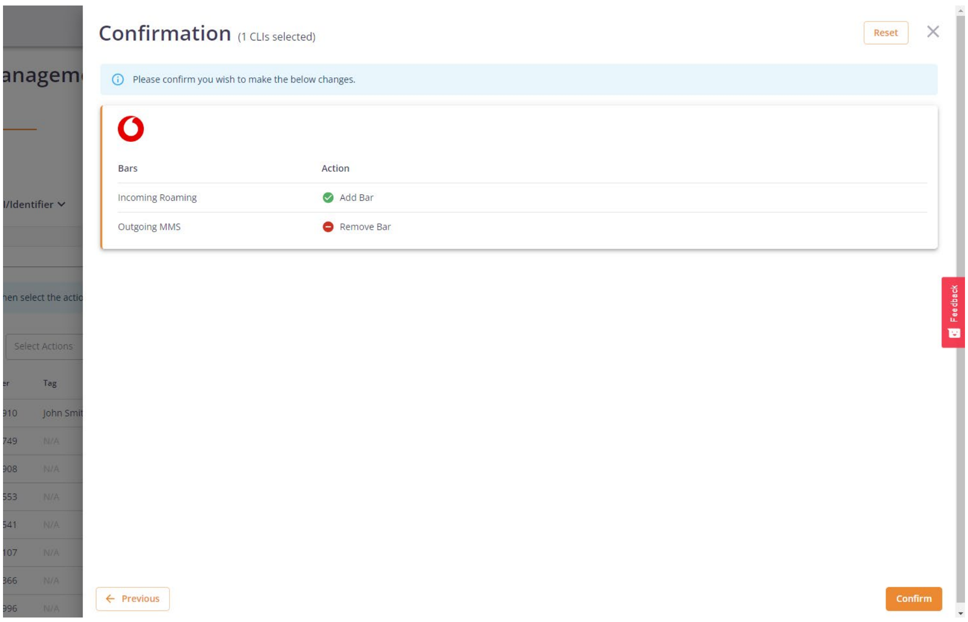
Note: the changes will be applied to all numbers you selected. These can fail if you have selected a bar which is incompatible with an existing bar, so please make sure you monitor the action in the History tab.

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



Step 6

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



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

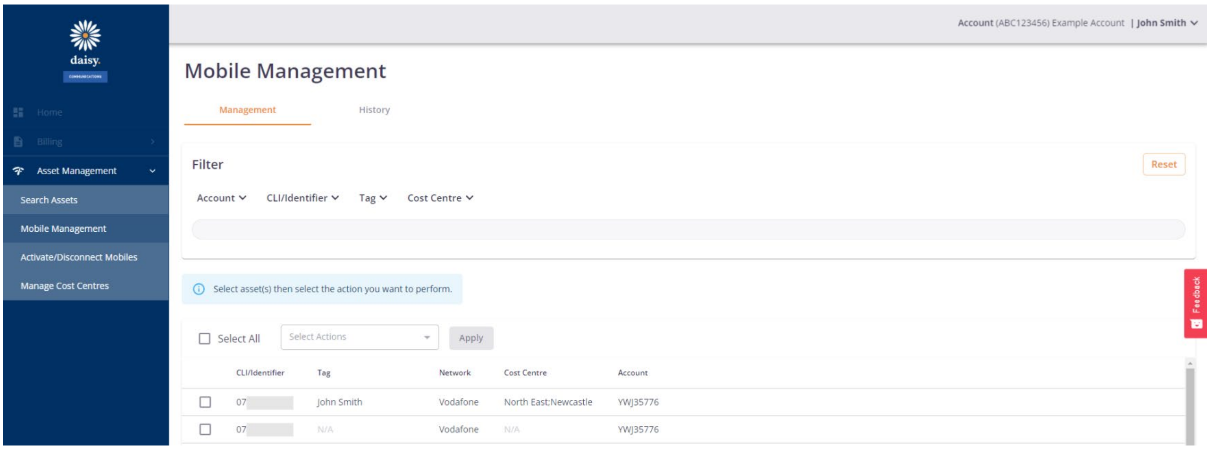
If you are looking to move your mobiles to a new provider, you will need a PAC or a STAC code.

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.

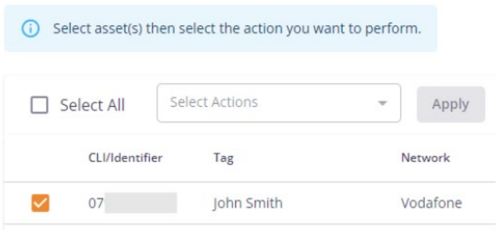


Step 2

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

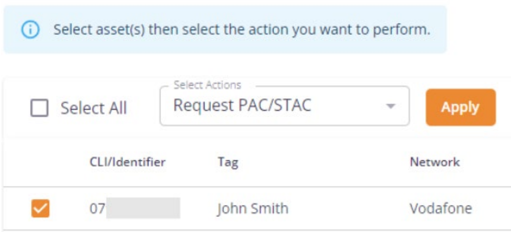
Step 3

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



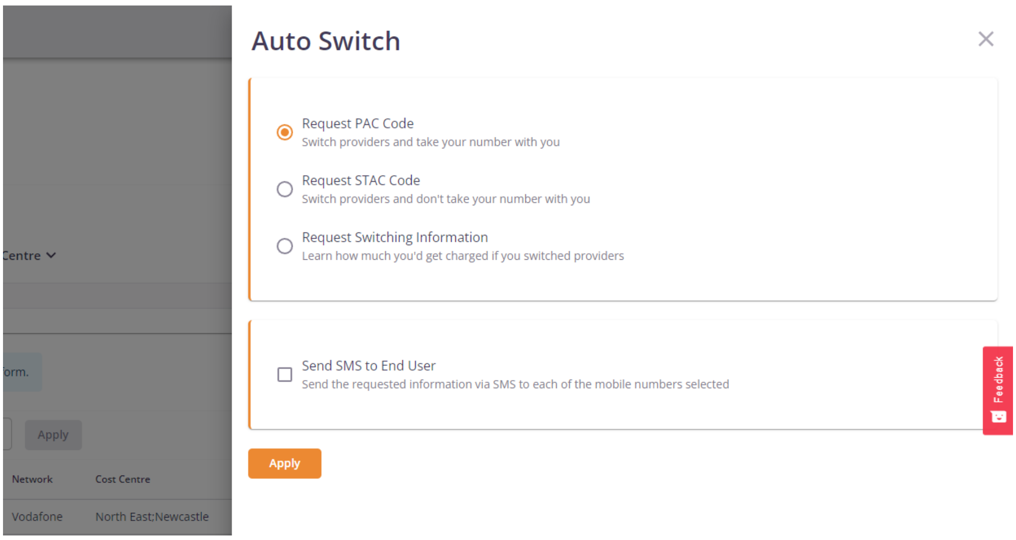
Step 4

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



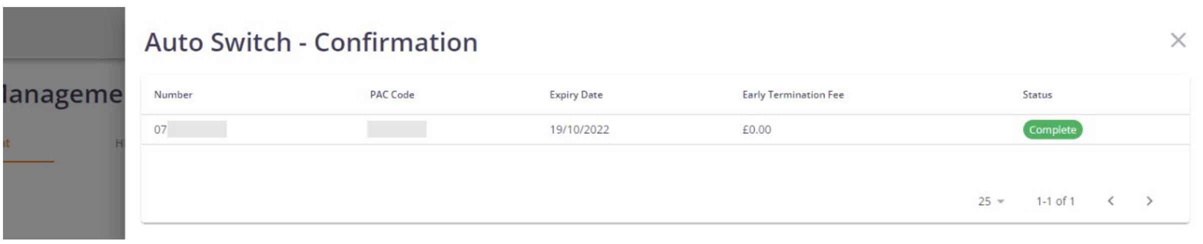
Step 5

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



Step 6

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



Worldwide Data Roaming

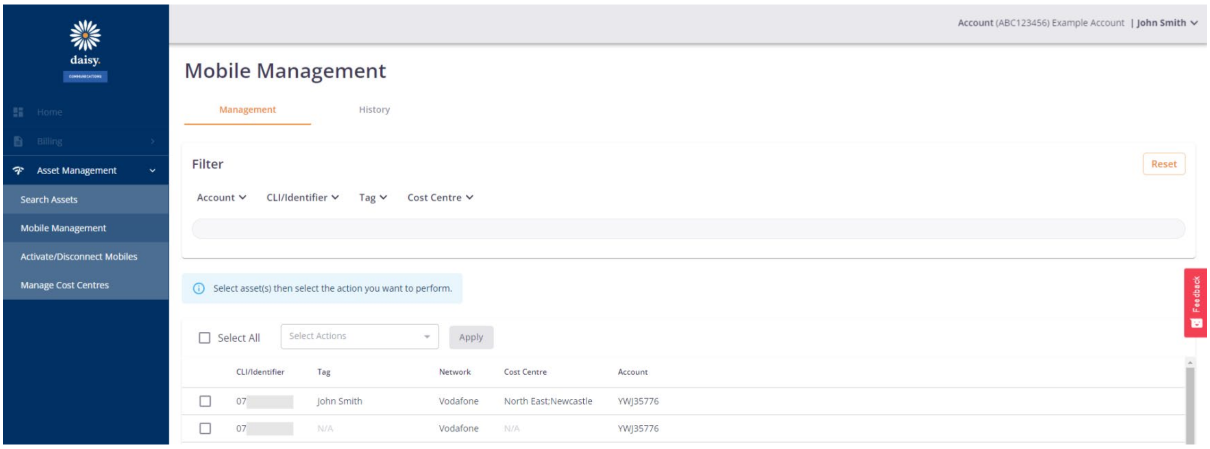
Worldwide Legislation from OFCOM means that we will be capping your Worldwide data roaming at £45 ex. VAT per billing month and barring you from using any more data abroad for the rest of your billing period.

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.

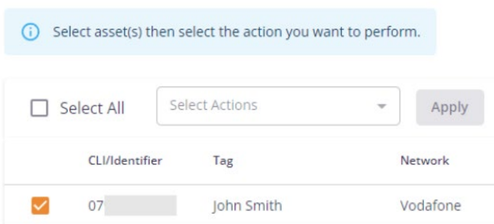


Step 2

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

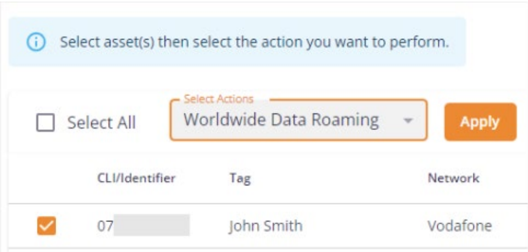
Step 3

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



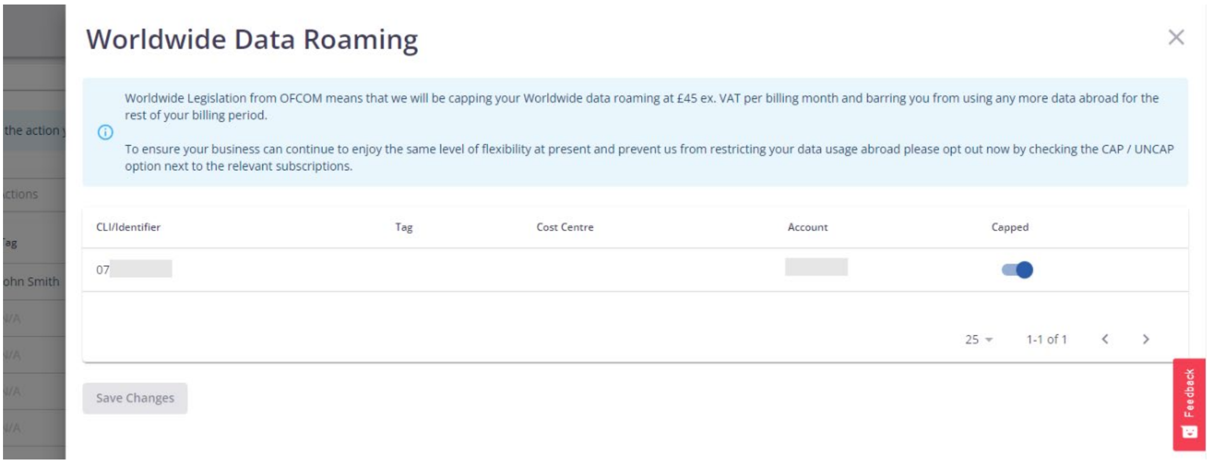
Step 4

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



Step 5

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



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

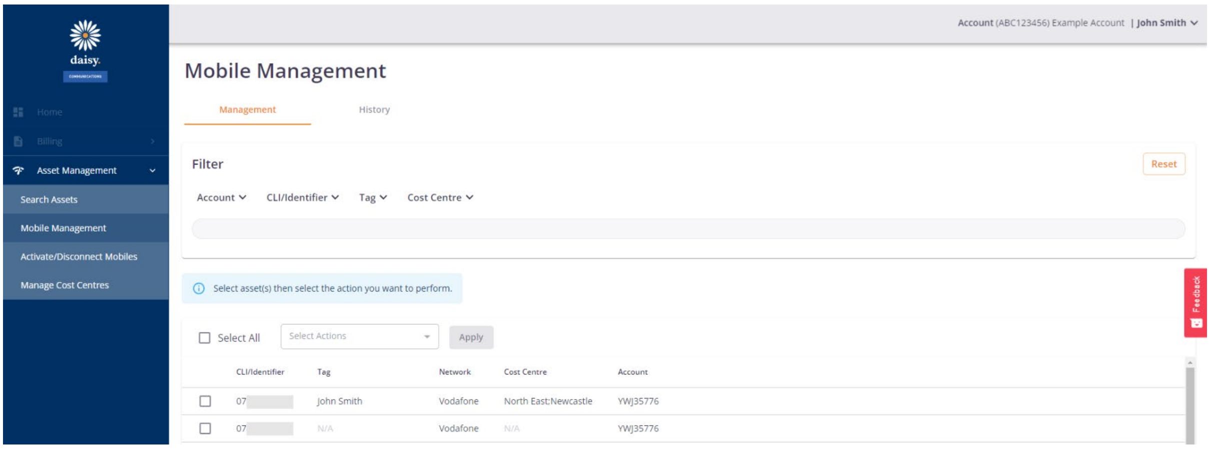
Move your mobile number to a new SIM using the SIM Swap feature.

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.

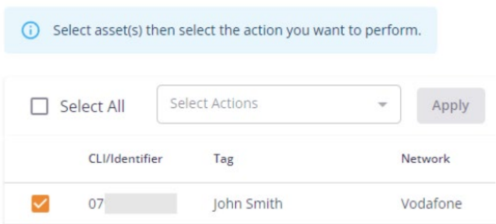
The page displays all your live mobile services.

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.

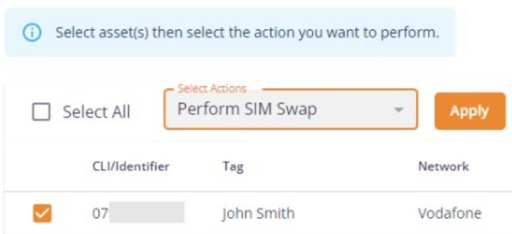


Step 2
Find the asset(s) you want to update. Filters can be used to assist with this.

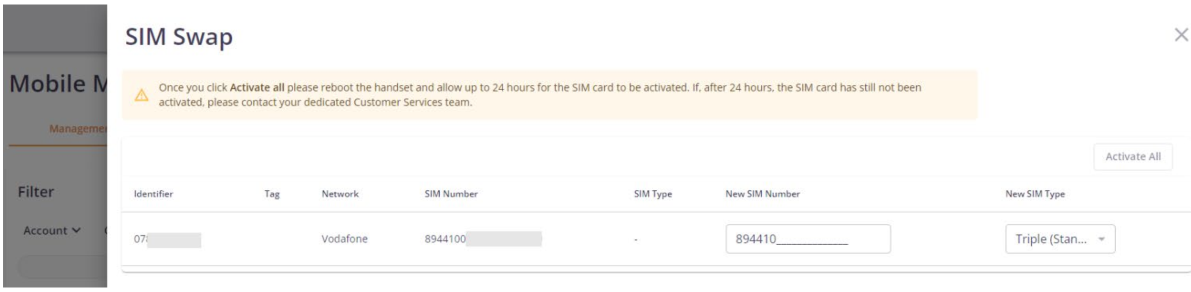
Step 3
Select the mobile number(s) you wish to update.



Step 4
Select the **Perform SIM Swap** action from **Select Actions**, then click **Apply**.



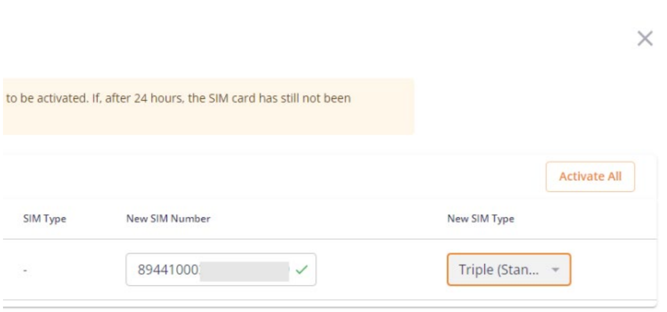
Step 5
The SIM Swap page will display with the current SIM details.



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.



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 <u>Check Mobile Change Status</u> guide for more details.

Update Mobile Bill Limit

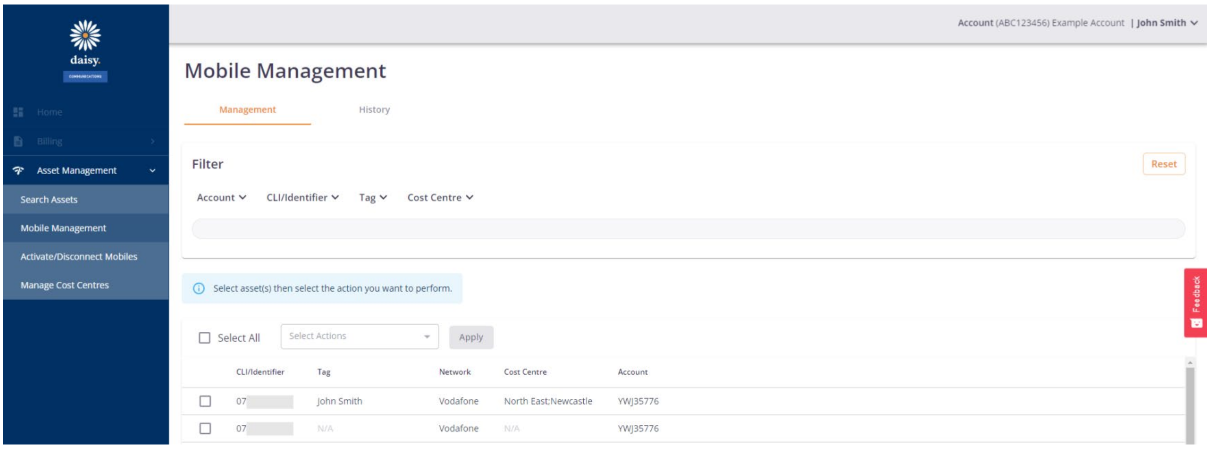
This service allows you to set a bill limit (£) against each individual mobile number. Only mobile numbers contracted from 1st October 2018 are eligible for bill limits. Bill limits exclude line rentals.

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.

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.

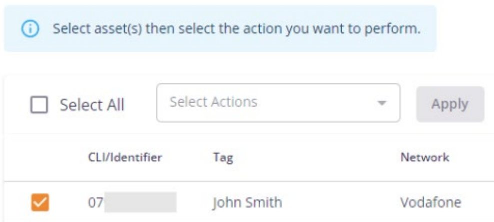


Step 2

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

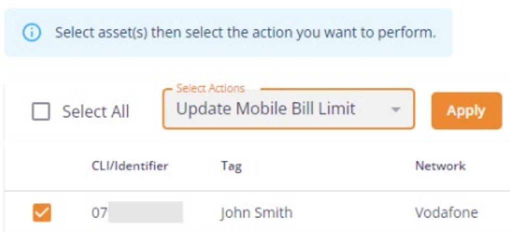
Step 3

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



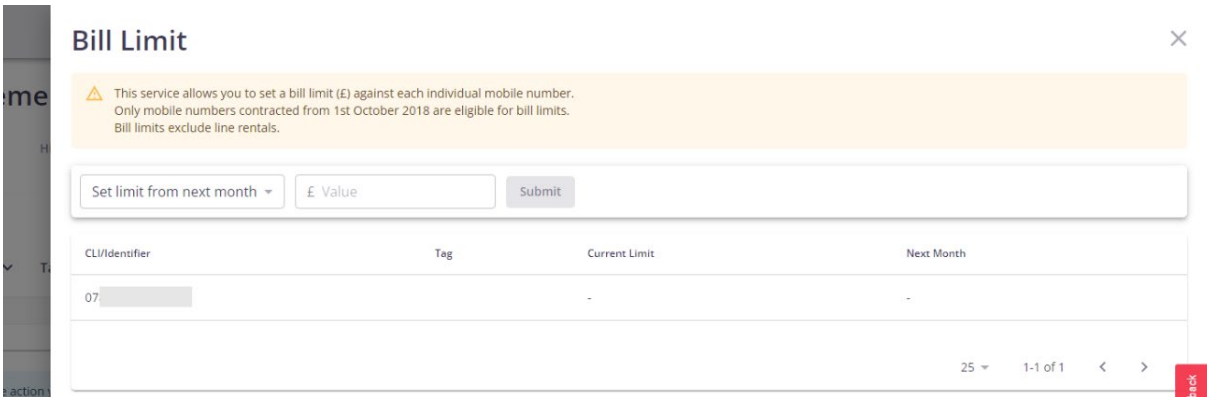
Step 4

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



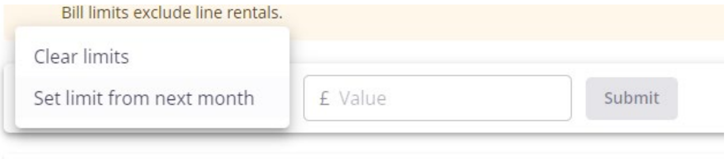
Step 5

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

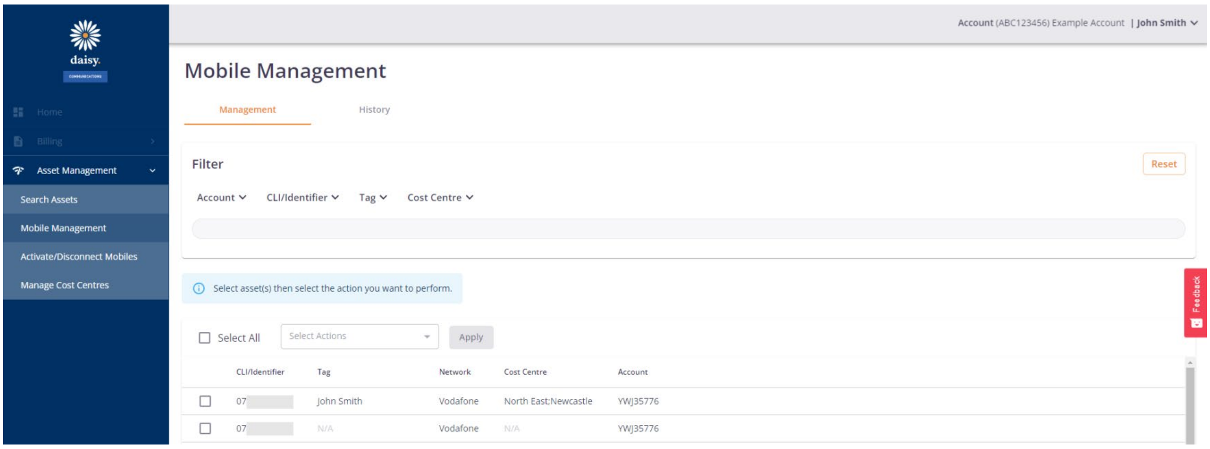
If you have lost your phone or it has been stolen, the Lost/Stolen SIM action allows you to block the SIM and optionally order a new one.

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.

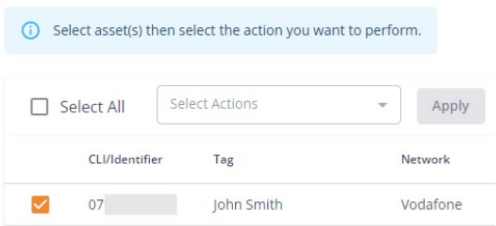
The page displays all your live mobile services.

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.

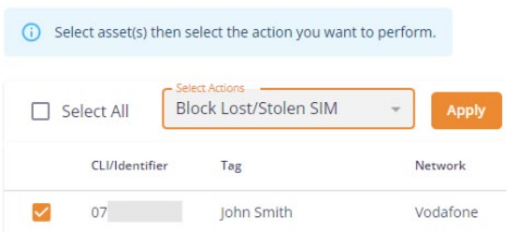


Step 2
Find the asset(s) you want to update. Filters can be used to assist with this.

Step 3
Select the relevant mobile number.



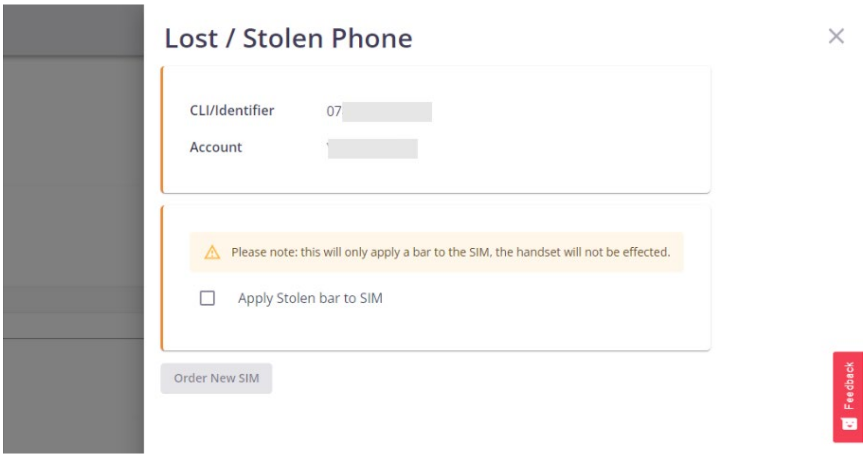
Step 4
Select the **Block Lost/Stolen SIM** action from **Select Actions** then click **Apply**.



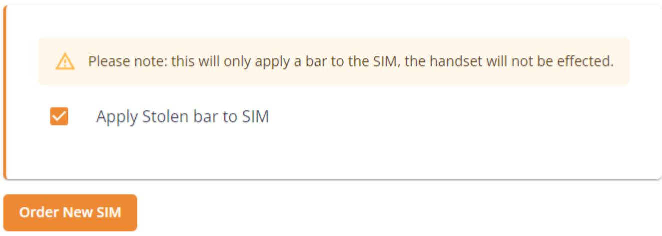
Step 5
Select the **Apply Stolen bar to SIM** checkbox. A popup will display asking you to confirm you are happy for the bar to be applied, click **Yes**.

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.

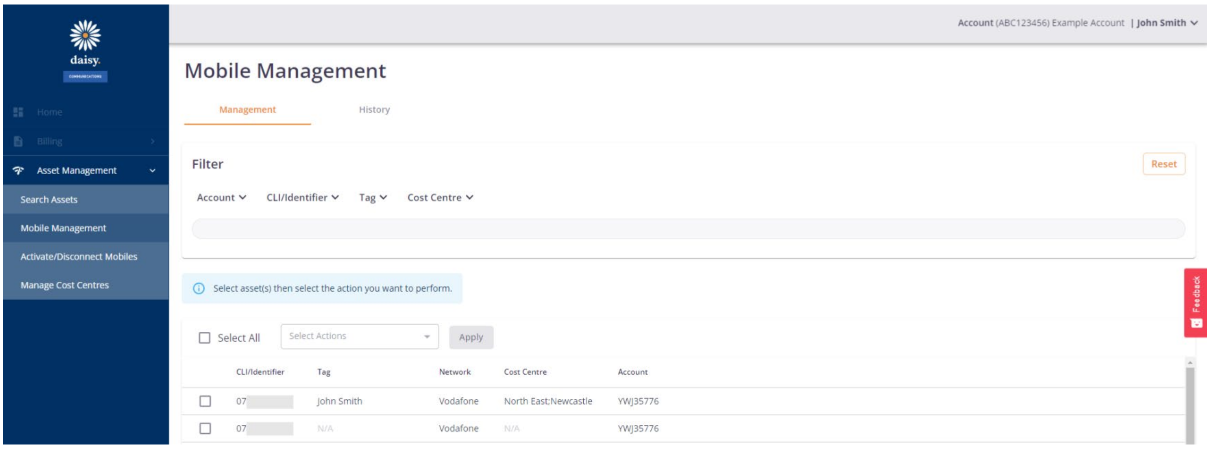
Unlock SIM

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.

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.

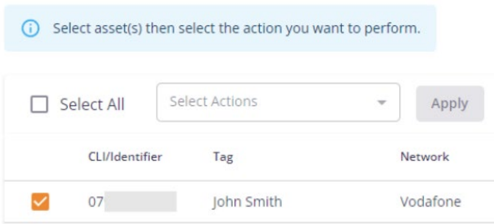


Step 2

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

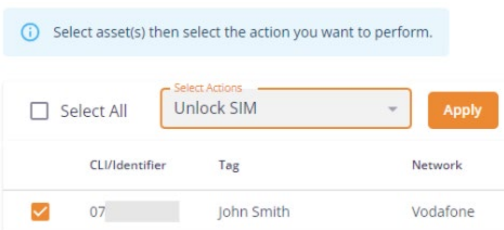
Step 3

Select the relevant mobile number.



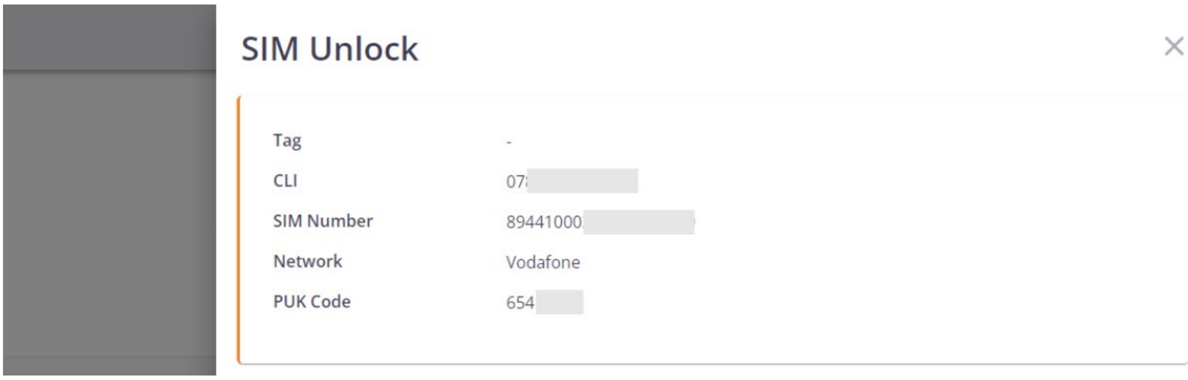
Step 4

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



Step 5

The PUK code will be displayed on the screen.

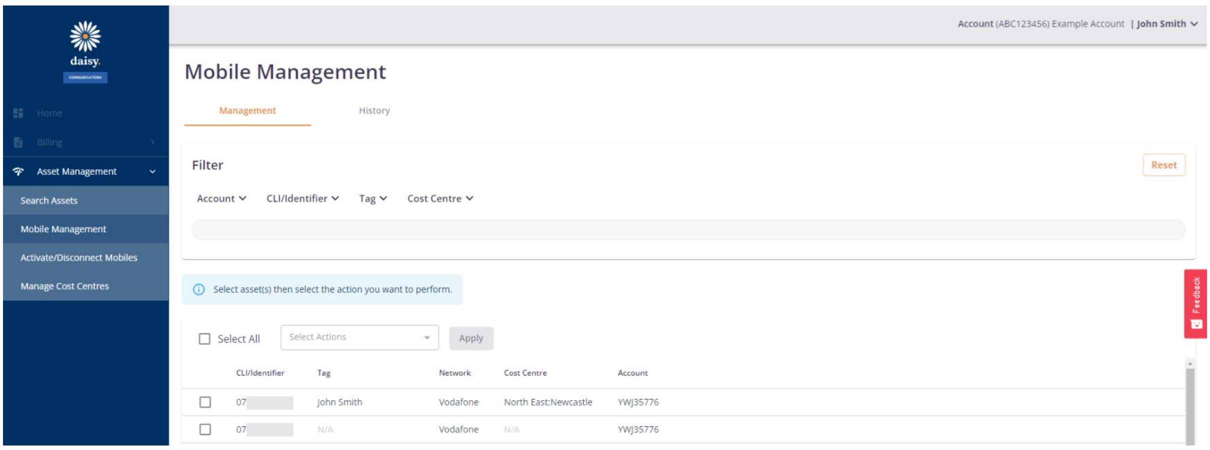


Order New SIM

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.

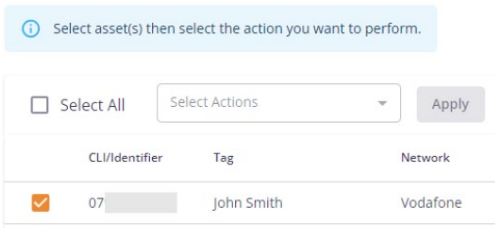
The page displays all your live mobile services.

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.



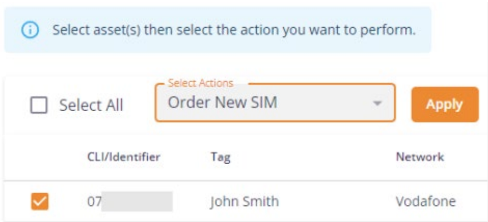
Step 2
Find the asset(s) you want to update. Filters can be used to assist with this.

Step 3
Select the relevant mobile number.



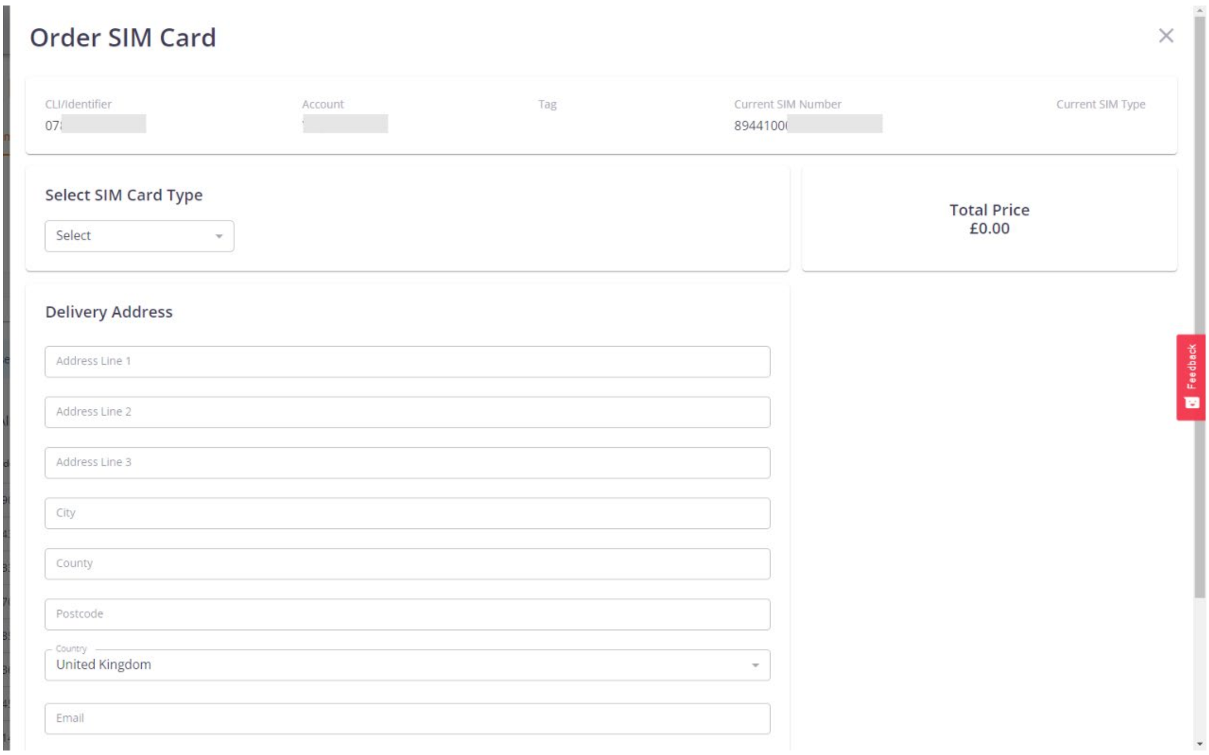
Step 4

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



Step 5

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



Step 6

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

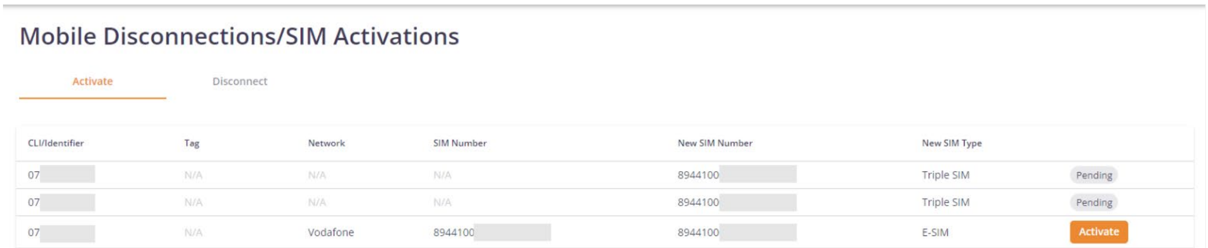
Activate Dispatched SIM

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.



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

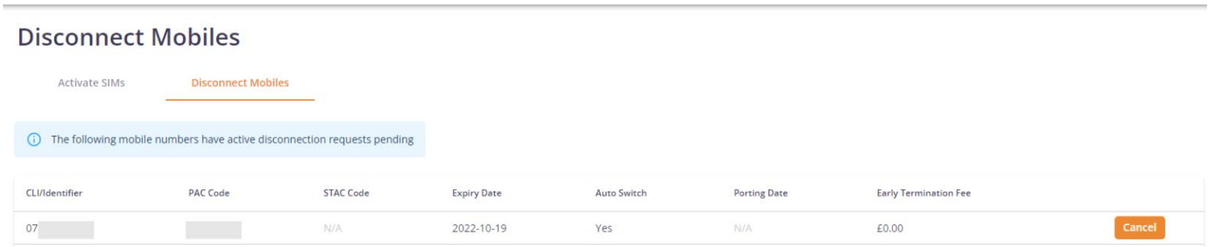
If you have any active mobile disconnections, including PAC or STAC requests, you can see them in the Mobile Disconnection page.

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.



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%.

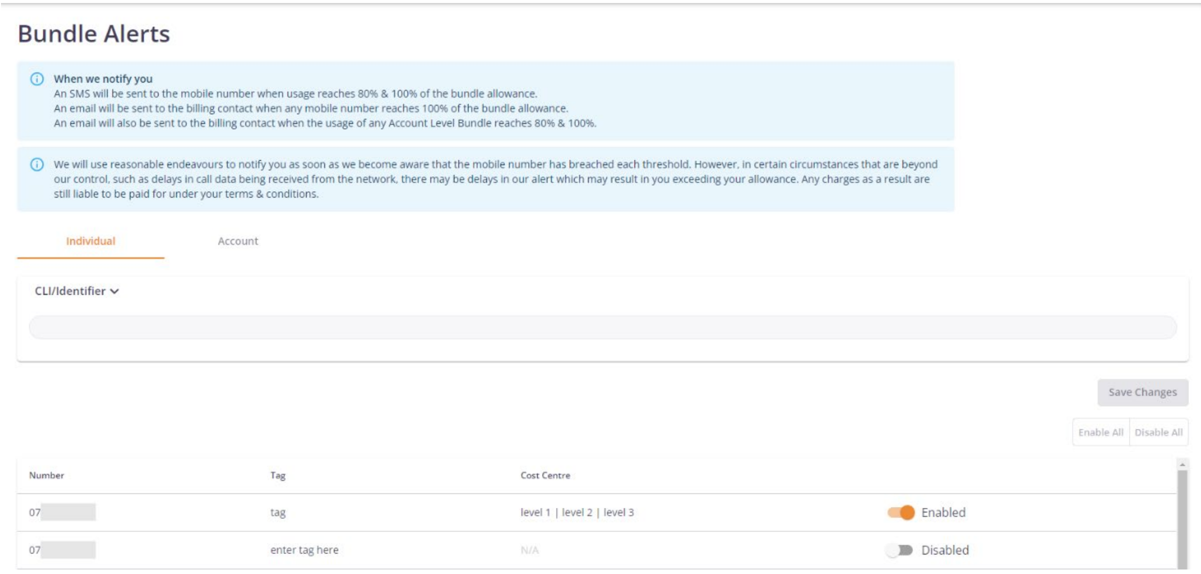
These alerts include data, minutes and text bundles.

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.



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

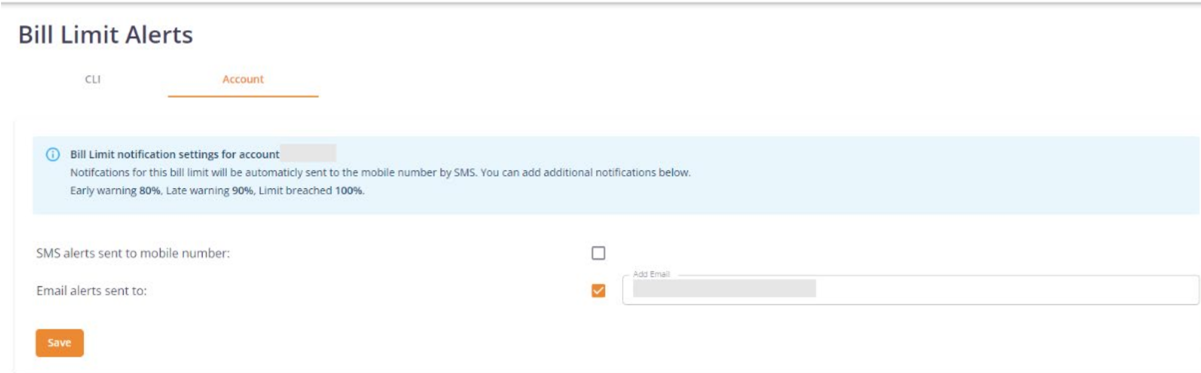
If you want to set the same bill limit alert settings for all your eligible mobile numbers, then this can be set in the Account tab.

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.



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

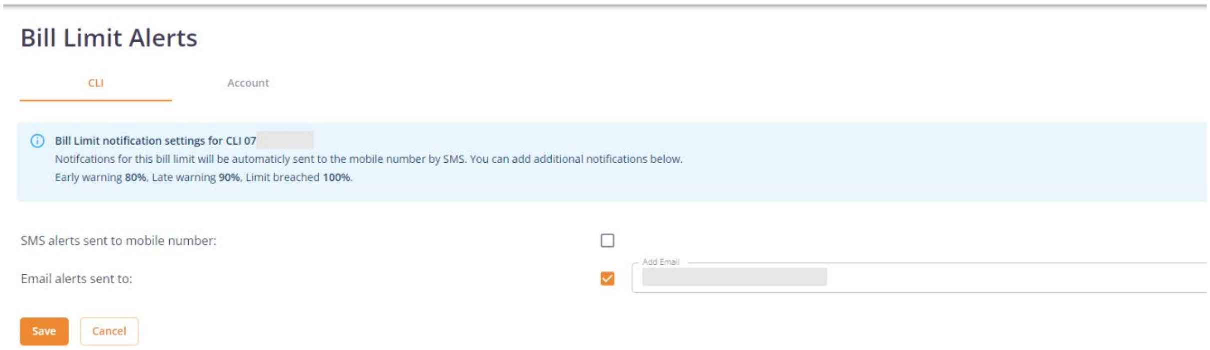
If you want the bill limit alert setting for a specific mobile number to be different to the default settings, then follow the below.

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**.



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.