



O₂
business

My O₂ Business

Our user guide for Medium
and Business Enterprise customers.

Updated November 2022

Contents

Section 1: Introduction

1.1	What is My O ₂ Business?	03
1.2	Features available in My O ₂ Business	04
1.3	Registration and signing in	05
1.4	Welcome page	06

Section 2: Bill Analyser

2.1	Navigation	07
2.2	Account selection	08

Account management

2.3	Summary	09
2.4	SMS Messenger	10
2.5	Tariffs and recent charges	11
2.6	Manage Bars	12
2.7	Spend Caps	14
2.8	Details about your connections	17

Reports

2.9	Dashboard	18
2.10	What reports are available?	19
2.11	Watchpoints and watchpoint alerts	21
2.12	Scheduled reports	22
2.13	Filter sets	23
2.14	Reporting structures	24

Invoices

2.15	All invoices and current transactions	25
------	---------------------------------------	----

Administration

2.16	User administration	26
------	---------------------	----

Section 3: My Account

3.1	My Account homepage	27
-----	---------------------	----

Manage contracts and devices

3.2	Update names and cost centres	28
3.3	Sim swap	29
3.4	Manage your digital subscriptions	30
3.5	Create new service requests	31
3.6	View and manage service requests	32

Manage users

3.7	Create new user	33
3.8	Edit user	34

Section 4: Help and Support

4.1	Help and support	35
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1.1 What is My O₂ Business?

My O₂ Business is our free online service that lets you view and manage all your mobile, fixed and broadband accounts, review and print bills, request changes to your account, swap sims and more.

Sign in to My O₂ Business to access Bill Analyser and My Account.

Bill Analyser

- For mobile, fixed and broadband bills
- Have your summary bills sent to your inbox free of charge. You can schedule bills to be emailed to up to 50 addresses. Hardcopy bills will incur a fee
- Keep on top of your spending – use reports or watchpoints to see who your top spenders are, how your bill is broken down, or who exceeds their spend over a set limit
- Give your colleagues access to Bill Analyser so they can tag their calls as personal or business. You can then run a report to see how phones are being used
- Reports can be generated and downloaded at any time, or scheduled to be sent to an email address
- Give access to others in your business, so they can manage the bills and reporting for you

You can read an introduction to My O₂ Business, watch case study videos, check out the FAQs and see an interactive demo at o2.co.uk/myo2business

My Account

- To manage mobile accounts
- Do sim swaps, username and cost centre changes
- Request new connections, tariff changes, transfers of ownership. Place hardware and accessory orders and more
- Give access to others in your business, so they can manage all updates and changes in My Account for you
- Track all service requests made on your account, by anyone who you have given My Account access to, over the past 6 months and see the status of those requests

1.2 Features available in My O₂ Business

As a Medium and Enterprise Business customer, your account administrators can raise requests in My Account. This makes it easy to track requests made on your account – much easier than keeping track of phone calls, emails or webchats. Everything is in one place.

Note: Sim swap, username and cost centre changes appear further up the home page and are automated journeys.

Multiple account change requests can be made, selecting from the drop down menus which can be found mid-way down the My Account home page. Make sure all relevant information is added to the request, in the free text boxes provided.

Instructions will be picked up by our Business Support Team and actioned within your contractual SLAs. You can track the progress and 6 months' history of these account change requests, in My Account.

In Bill Analyser you can	In My Account you can	
View, download and email bills (brief summary, in detail or itemised)	You can track the progress and 6 months' history of these account change requests, in My Account under "Service Cases"	
Schedule bills to be sent to your inbox	Perform sim swap	
View unbilled usage and remaining allowance information	Manage users by changing user names and cost centres	
View and schedule bills on your device	Change users of the account	
Run, schedule and download unbilled usage reports	Manage your digital subscriptions	
Analyse spending by running, scheduling and downloading reports on billed usage	Request type	Request sub type
Tag calls as either business or personal	Manage Bolt Ons	Add or remove a Bolt On
View history of bills, payments and credits	General enquiries	Check sim status Delivery enquiry Device query General billing Request a copy invoice
View, add and remove bars from individual connections on your account*		
Upload and manage an address book	PAC and PUK codes	Get a PAC code to port a number Get a PUK code to unlock a device
Set up and view billed watchpoints	Place an order	24 hour replacements requested after 12pm 24 hour replacements requested before 12pm Add a new connection or activate a new connection Add an ø Boostbox Place an order after 12pm Place an order before 12pm Check device stock levels before placing your order
As an administrator, send text messages to mobile users on the account		
View, Edit and Add Spend Caps		

1.3 Registration and signing in

Who can use My O₂ Business?

Any business customer can have full access to both Bill Analyser and My Account.

If you are a Medium Business customer, you will be automatically registered 2 days after joining O₂, provided the first name, surname, mobile phone number and email address is correctly entered at the point of sale in our billing system.

Enterprise customers are set up via the implementation process.

If you are a My O₂ Business administrator, you can sign users up to Bill Analyser only, My Account only, or to both; as either administrator or end user, depending on what account information you need them to have access to. Or you can request access for colleagues by contacting your usual O₂ Business contact.

An administrator can: view and analyse the spend across the whole billing account, create, view and manage account change service requests.

An end user can: view their portion of the bill and analyse their own spend, including tagging usage as business or personal. View account information for your own phone number.

Completing registration

You will receive an email to complete registration. When you click on the link in the email, a single use PIN number will be sent to your nominated mobile phone number. Enter the PIN where prompted on the website, complete your details by selecting a password and choose a secret question and answer.

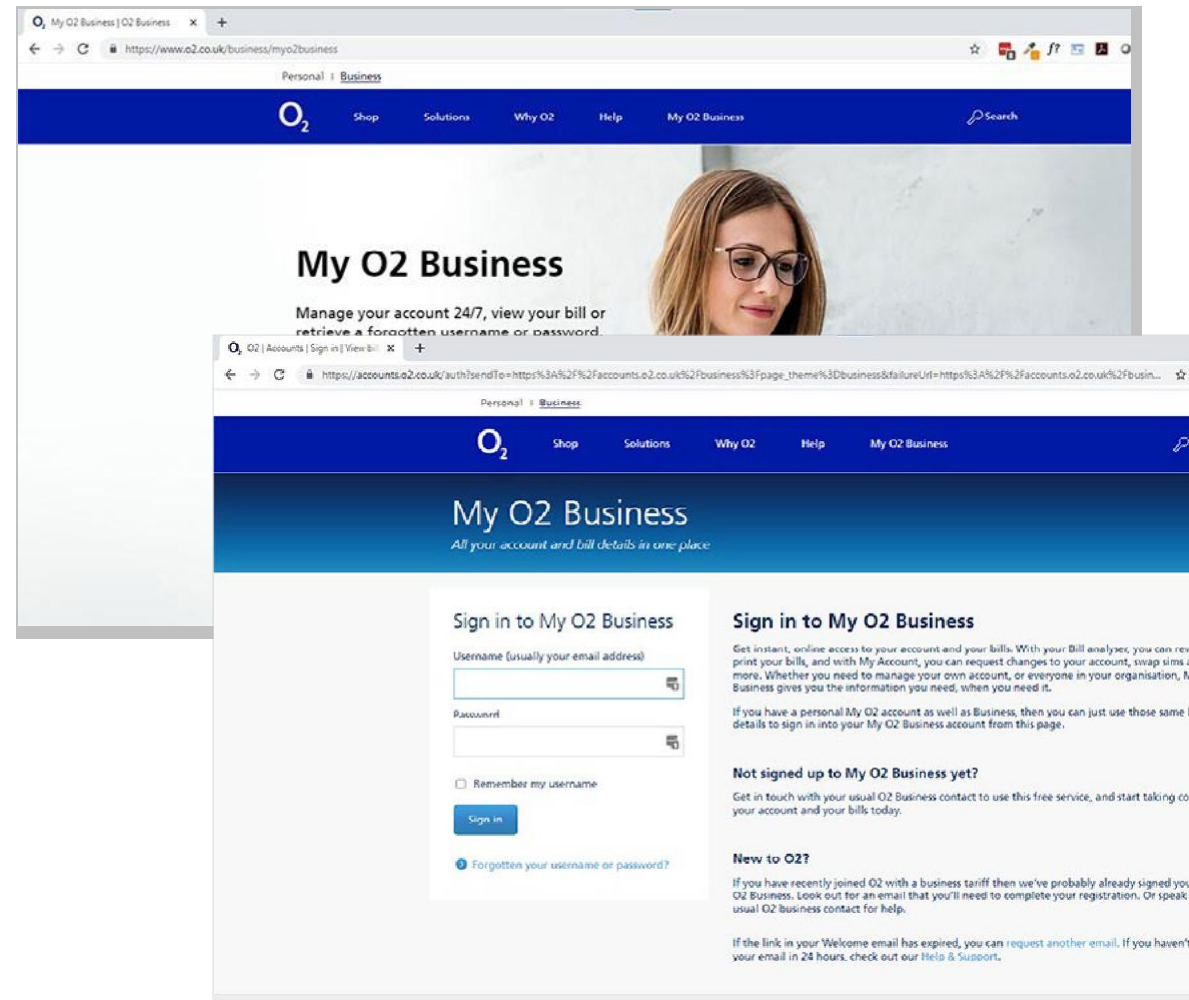
How you sign in

1. Go to www.o2.co.uk/business/myo2business and click **Sign in**.
2. Type your username and password and click **Sign in**.
3. Select **Bill Analyser** or **My Account**. If either one is missing, speak to your usual O₂ Business Contact for help

Notes:

If the email hasn't arrived within a few hours, check your spam folder.

If the email has arrived but 96 hours / 4 days has passed and the link has expired, request a new validation email via o2.co.uk/myo2business



1.4 Welcome page

Bill Analyser

View your bills, analyse your spend and run reports.
If the link to Bill Analyser isn't showing, contact your usual O₂ Business contact.

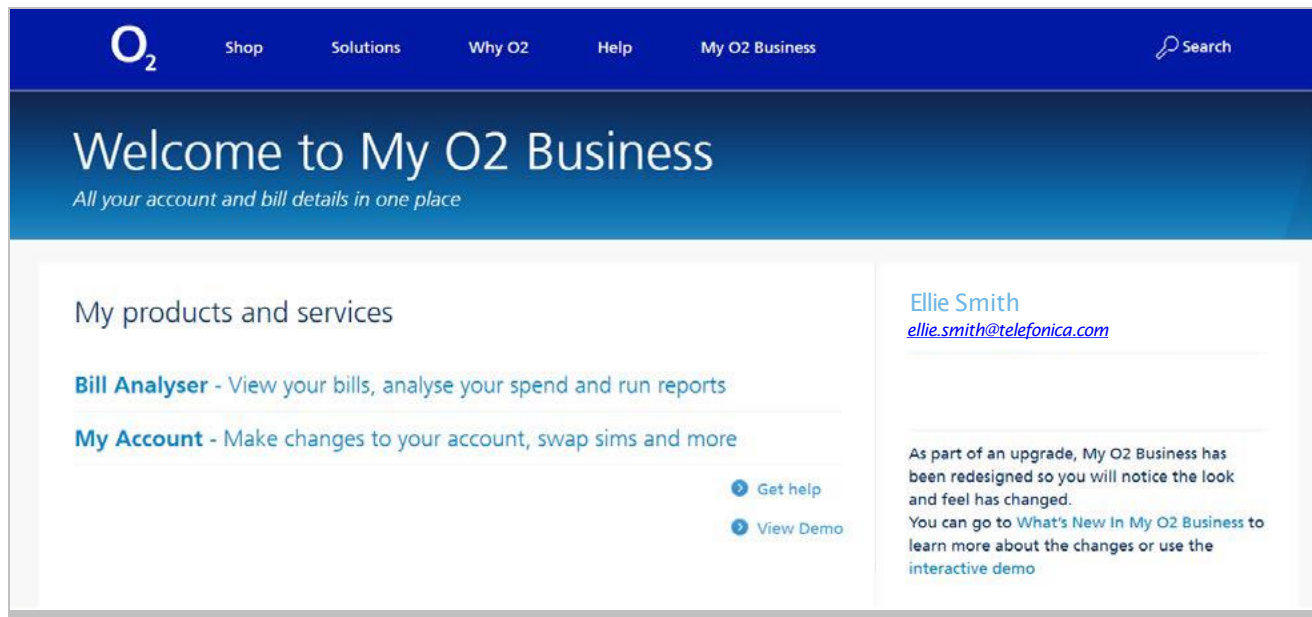
My Account

Quick link to My Account to see and request changes to your account.

If this link to My Account isn't showing, contact your usual O₂ Business contact.

How to do it

Click on your email address to update your contact details or change your password, secret question and answer. View helpful information by selecting 'Get Help' or 'View Demo'?

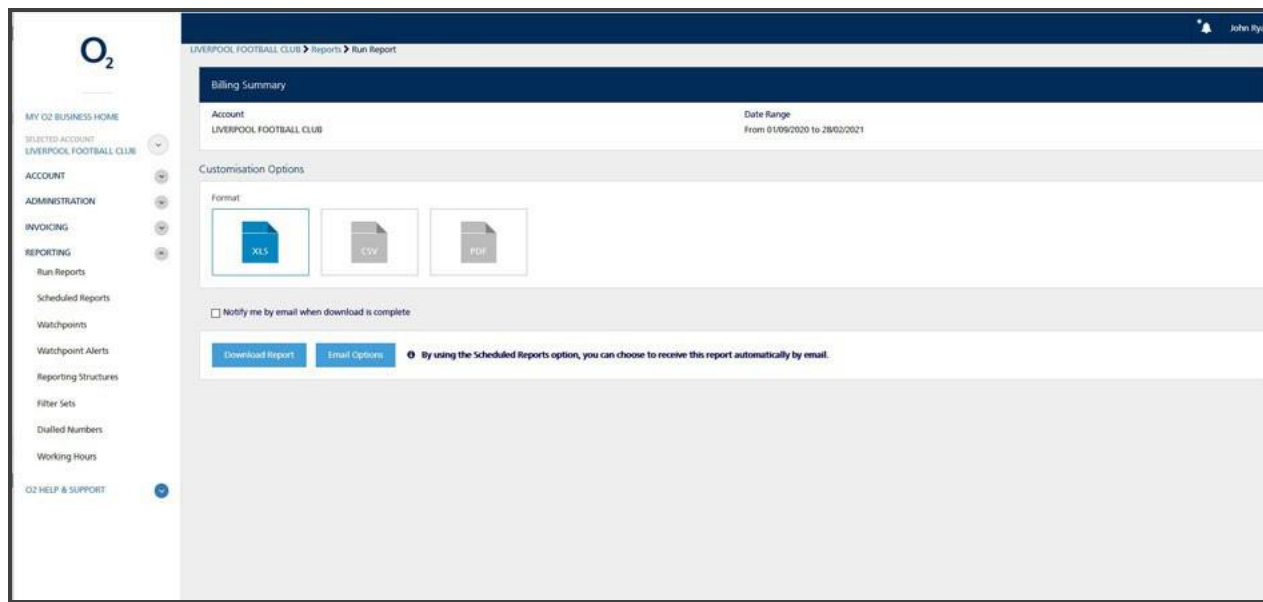
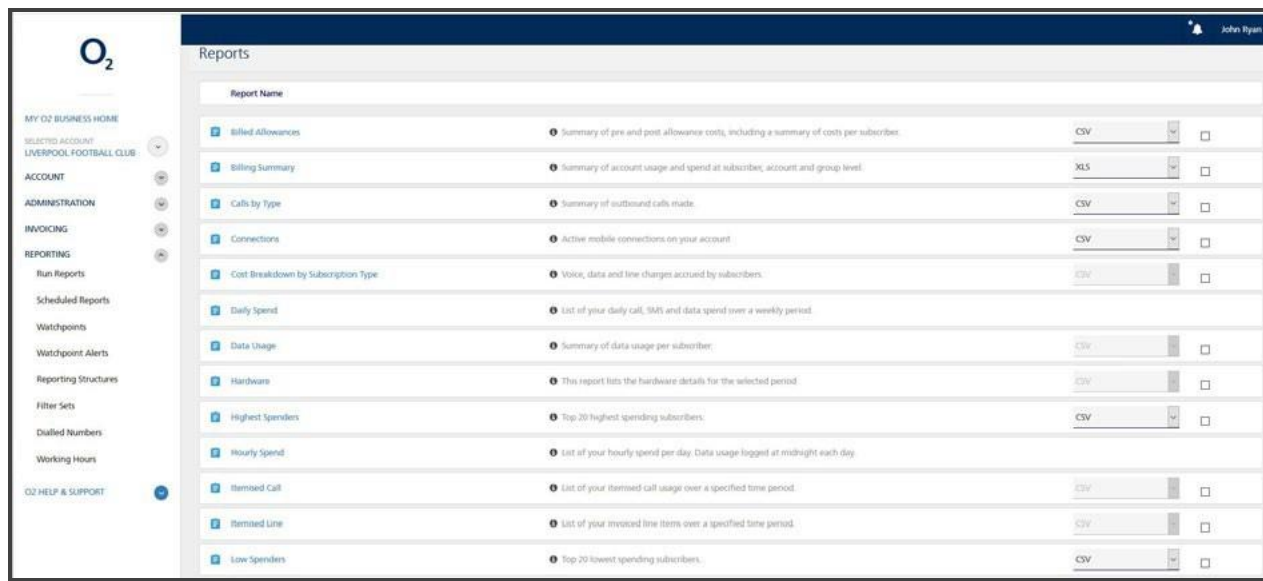


The screenshot shows the 'My O2 Business' welcome page. At the top is a dark blue navigation bar with the O₂ logo on the left and links for 'Shop', 'Solutions', 'Why O2', 'Help', and 'My O2 Business' in the center. A search icon and the word 'Search' are on the right. Below the navigation bar is a large blue header area with the text 'Welcome to My O2 Business' and the tagline 'All your account and bill details in one place'. The main content area is white and divided into two columns. The left column is titled 'My products and services' and contains two links: 'Bill Analyser - View your bills, analyse your spend and run reports' and 'My Account - Make changes to your account, swap sims and more'. Below these links are two buttons: 'Get help' and 'View Demo'. The right column displays the user's name 'Ellie Smith' and email address 'ellie.smith@telefonica.com'. At the bottom of the right column, there is a message: 'As part of an upgrade, My O2 Business has been redesigned so you will notice the look and feel has changed. You can go to What's New In My O2 Business to learn more about the changes or use the interactive demo'.

2.1 Navigation

Summary

To help you navigate Bill Analyser, here is an overview of the menu bar and its related tabs.



Note:

Access will depend on the user's role.
 Favourite numbers only appears to those on the relevant tariff.

2.2 Account selection




Summary

If you have multiple accounts, you will see them listed on the account selection screen.

Select the account you want to analyse.

How to do it

1. Go to [Account Selection](#)
2. Click the account you want to analyse

Accounts by ID	
 LIGHTHOUSE ANALYTICS LTD	WOLLEY
 SPINDLE CLUB	HELEN LITTLEFORD
 TELEPHONE FOR BUSINESS USE	TEPARD

2.3 Account management

Summary

Key benefits

Quickly see a summary of your costs incurred since your last invoice. You can see how much you've spent, recent charges, tariff information, not billed yet information. You can also view only active connections, or by any Reporting Structures you've created.

How to do it

1. After logging in and selecting Bill Analyser, you'll see the [Account Management](#) page
2. To view your overall Group account summary, click your [Group name](#) at the top of the hierarchy pane
3. A summary of your Group account details will be displayed
4. To view the summary of your Business accounts, click the drop down arrow on your Group name to expand your [Group account](#)
5. Click the Business account you want to view
6. A summary of your Account details will be displayed
7. To view the summary of any of your individual telephone numbers, click the desired account in the hierarchy pane to expand your account(s)
8. All of your individual telephone numbers will be displayed. Click an individual telephone number to view its specific details
9. A summary of the individual telephone number details will be displayed

The screenshot displays the O2 Business Account Management interface. The left sidebar shows navigation options: SELECTED ACCOUNT, ACCOUNT, ADMINISTRATION, INVOICING, REPORTING, and O2 HELP & SUPPORT. The main content area is titled 'Up a level - [Group Name]' and shows a list of accounts under 'Accounts by ID'. The right-hand summary panel includes:

- CURRENT BALANCE:** £0.00
- OVERDUE AMOUNT:** £0.00
- ACCOUNT STATUS:** Normal
- PAYMENT TYPE:** Cheque
- AMOUNT IN QUERY:** £0.00
- PAYMENT TERMS:** 30 Days Airtime
- LATEST INVOICE:** £136.93 (ex VAT), payable on or before 23/11/2020. Includes a 'DOWNLOAD' button and a 'View Invoices' link.
- ALLOWANCES:** Your available allowance this Period is 1,300 Minutes. A progress bar shows 0 Minutes Used and 1,300 Minutes Remaining. Includes a 'View Allowances' link.

2.4 Account management

SMS Messenger

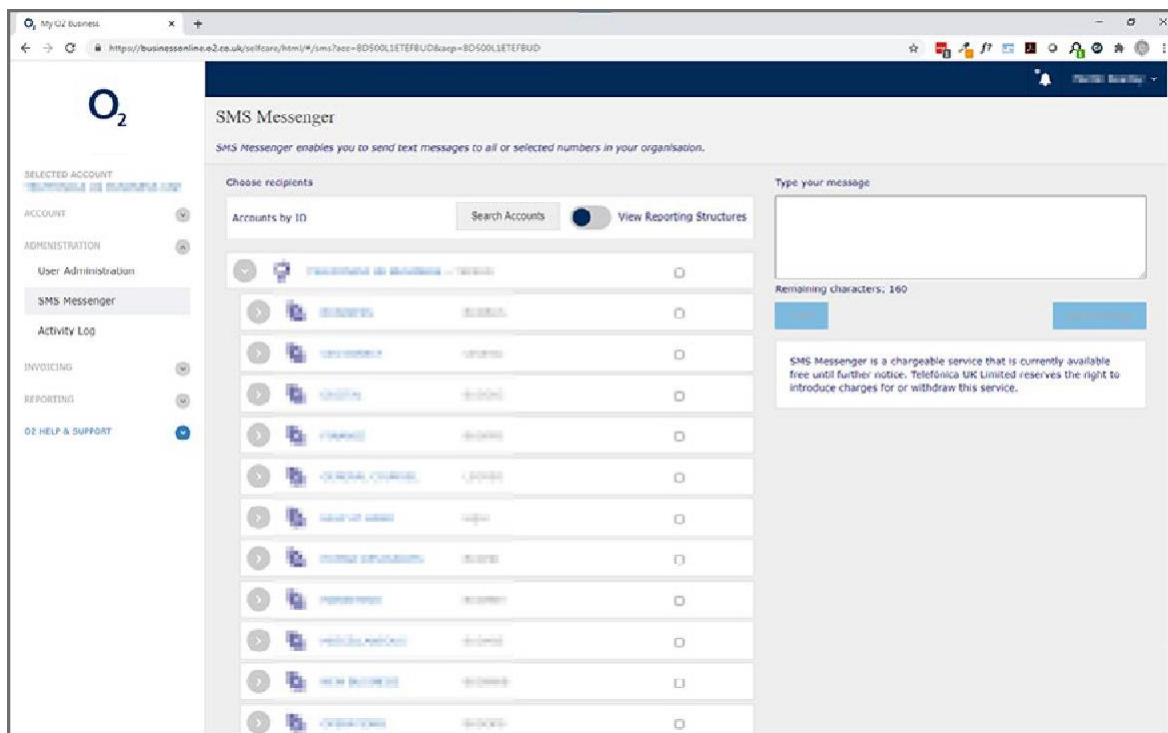
AVAILABLE TO ACCOUNT ADMINISTRATORS

Key benefits

SMS Messenger enables you to send free text messages to all of the mobiles on your account, or some at a time - either that you select manually or by using your pre-defined Reporting Structures. The time it takes to deliver your message to intended recipients can vary depending on the number of recipients and network performance.

How to do it

1. After logging in and selecting Bill Analyser, you'll see the Account management page. Click [Administration](#)
2. Click [SMS Messenger](#)
3. Choose [SMS recipients](#). Either using the account hierarchy drop down lists, or the search function. (For this example we will use [Search Accounts](#)). Click [Search Accounts](#)
4. Enter the search details for the associated account
5. Click the [Search](#) icon
6. Tick the checkbox next to the desired recipient's details
7. Enter your message content
8. To send the message, click [Send](#)



2.5 Account management

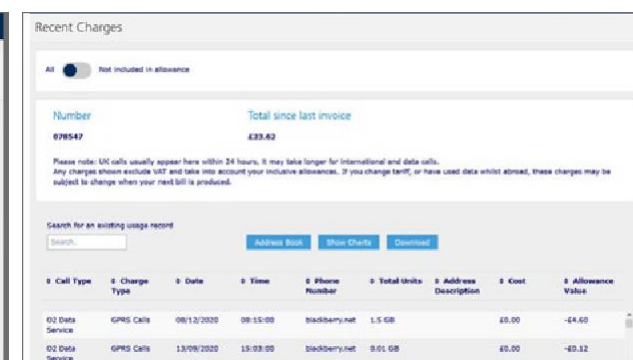
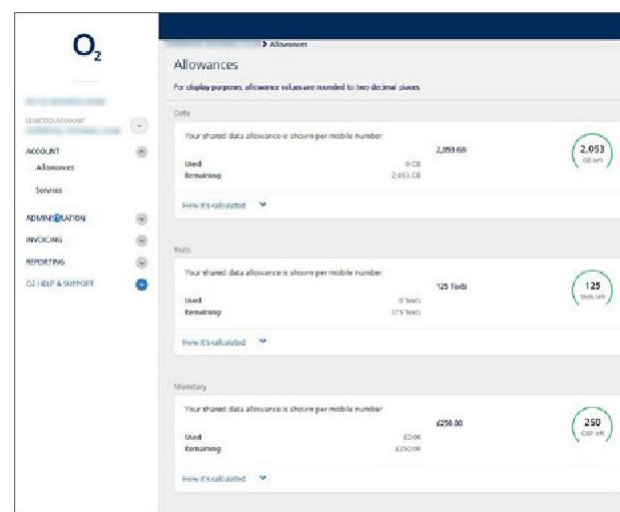
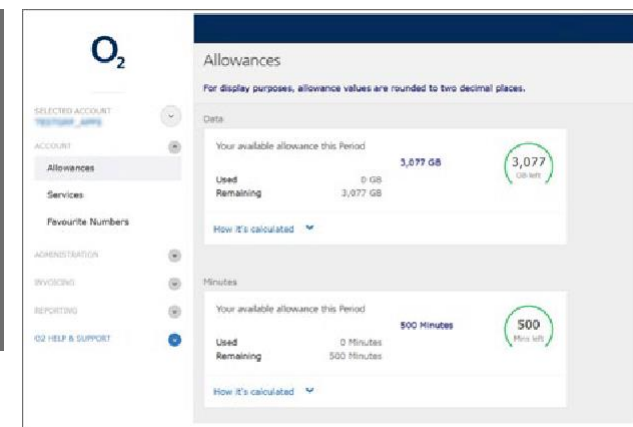
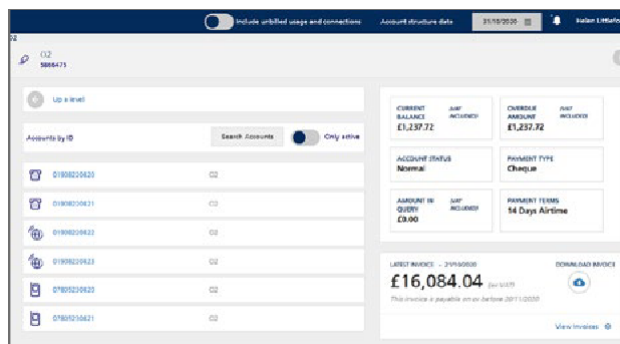
Tariffs and recent charges

Key benefits

View tariff details, allowances and usage, services and discounts and recent charges for each number on the account.

How to do it

1. To view your allowances, select the 'View Allowances' link on the 'Allowances' tile on the landing page, or select 'Account' and then 'Allowances' in the left hand menu
2. To view recent charges select the subscription you wish to view and then 'View recent charges' from the landing page tile



2.6 Account management

Manage bars (Bar phone numbers on your account)

If you're an administrator of a business account, you can apply different types of bars to phone numbers on your account, like bars on premium numbers or international calls. This gives you more control over how the phone is used and your spending.

1. Log in and go to Bill Analyser
2. Select the mobile phone number
3. Select bars from the left hand navigation
4. Using the toggle button, switch the required bar on or off
5. The page will refresh to show your choices
6. Change or confirm your selection

The screenshot shows the O2 User Administration interface. The left sidebar contains navigation options: MY O2 BUSINESS HOME, SELECTED ACCOUNT (BAMPTON BUILDERS), ACCOUNT, ADMINISTRATION (User Administration, SMS Messenger, Activity Log), INVOICING (View Invoices, Email Invoices, Current Transactions), REPORTING, and O2 HELP & SUPPORT. The main content area is titled 'User administration' and shows 'Step 1: Edit User' and 'Step 2: Assign Reporting Level'. A search bar is present, and a table lists accounts by ID. The 'Selected Reporting Levels' section shows 'MOBAS LIMITED' with the role 'SMB Administrator Role'.

Accounts by ID	
ALSA GROUPY & Sonr	ALSA GROUPY & Sonr
ARGON LTD	ARGON
FFI	FFI
LIVERPOOL FOOTBALL CLUB	LFC
MARTIN BAWES SYSTEMS	MATEDAV
MOBAS LIMITED	MOBAS
SCG SERVICES	SERSCG
ARGOS VIRTUAL LINK	VLARGS
TECHNOLOG - GRID ACCOUNT	GRID

Selected Reporting Levels		
Accounts by ID		
MOBAS LIMITED	MOBAS	SMB Administrator Role

2.6 Account management

Manage bars (Bar phone numbers on your account)

Continued from page 12

Bar Name	Description
IMEI	Prevents all functions on a specified device.
Stolen*	Prevents all functions on a specified device, once identified as stolen. It is recommended to also apply to the IMEI Bar.
Full*	Complete barring of all phone functions on a specified.
GPRS	Bars all data usage on a specified mobile phone number.
Outgoing call bar*	Restricts all outgoing calls on a specified mobile phone number.
Premium, International and Roaming Bar	A multipurpose Bar that prevents a specified mobile phone number from making international calls from the UK to numbers overseas; roaming calls made whilst overseas; and calls to Premium Rate (09) numbers.
International Bar	Prevents a specified phone number from making calls to other countries whilst in the UK.
Roaming Bar	The specified mobile phone number can only make and receive calls in the UK. No voice or data services allowed whilst roaming outside the UK.
Premium Bar	Prevents calls to Premium Rate (09) numbers on a specified mobile phone number.
Adult and chat bar	Restricts adult and chat Premium SMS services on a specified mobile phone number.
Premium and International Bar	Restricts international calls and calls to Premium (09) numbers from a specified mobile phone number.
Default Limited Roam Bar	The specified mobile phone number can only make international calls from abroad back to the UK, or to numbers within the country they are visiting.
Customer Request Limited Roam Bar	Identical to Default Limited Roam Bar, but is only applied if the account holder has specifically requested this level of barring.
Incoming Roaming Call Bar	Mobile phone number cannot receive any incoming calls when they are away from the UK. They may make calls but cannot receive them.
Spend Caps	You cannot remove a Spend cap - please call us to remove a spend cap. All changes to spend caps will take up to 24 hours..

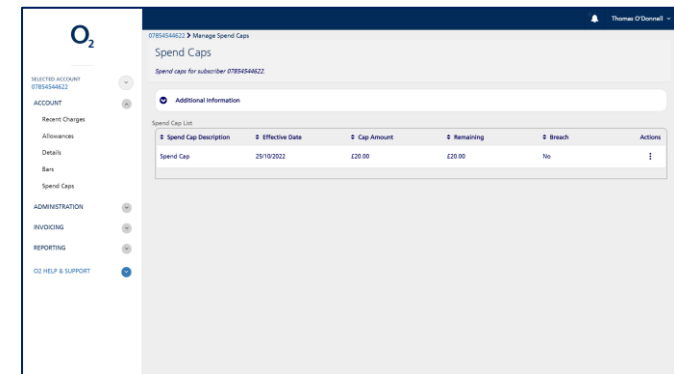
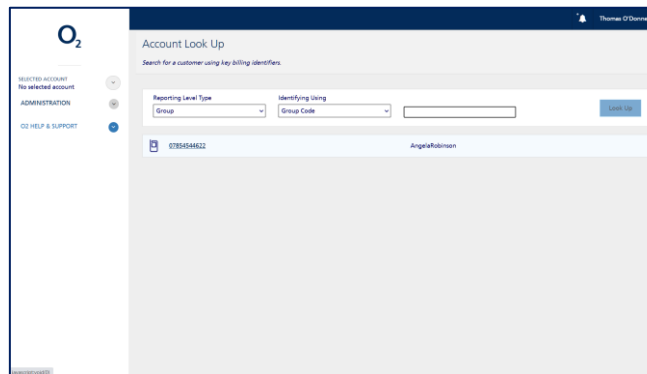
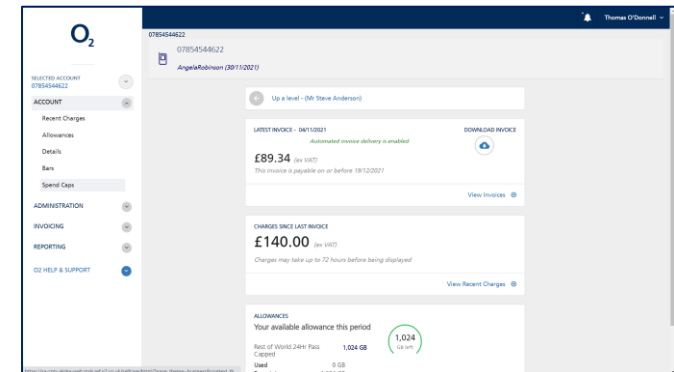
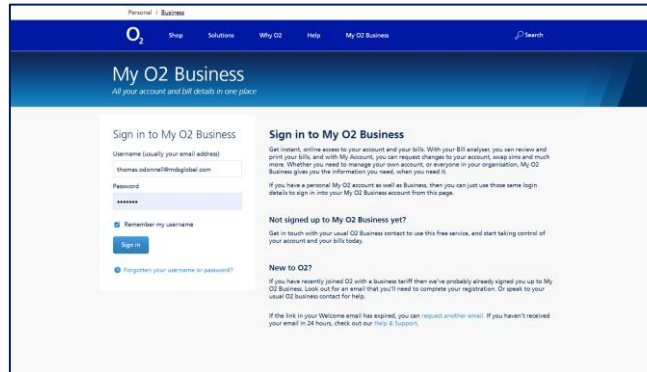
*Please note that the status of the **outgoing, stolen and full bars** will be visible, but to switch them on or off, you will need to speak to a customer services representative.

2.7 Account management

Spend Caps - View

Key Benefits: You can now view, add and edit spend caps. This gives you more control on your spending.

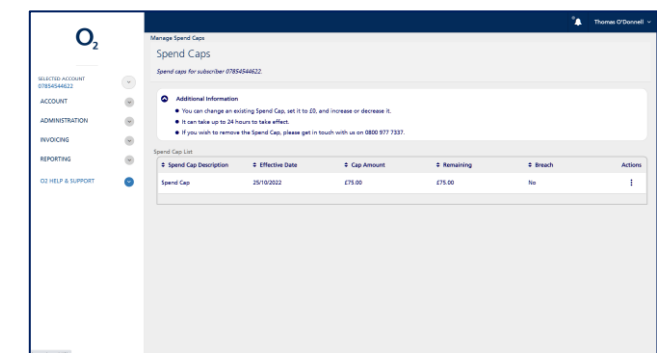
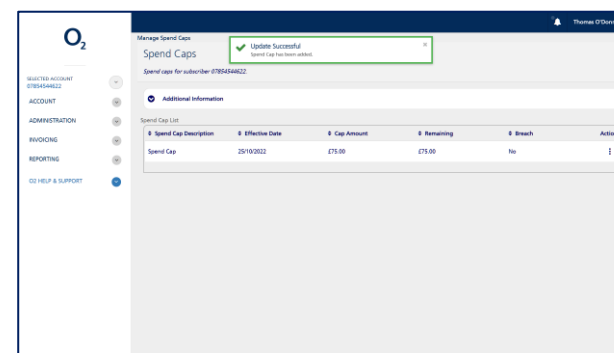
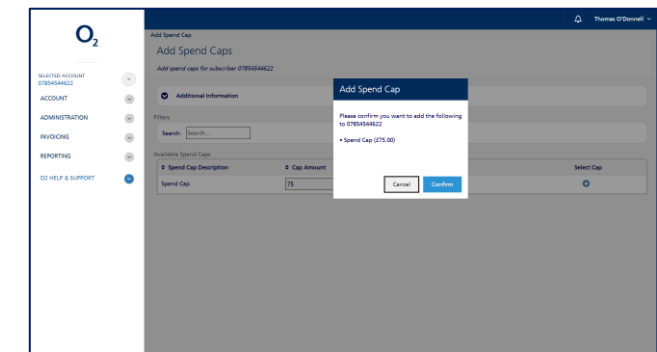
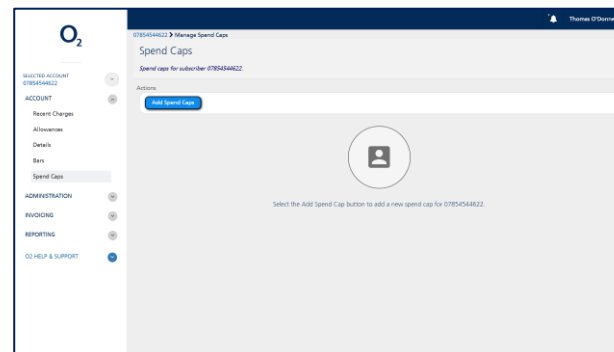
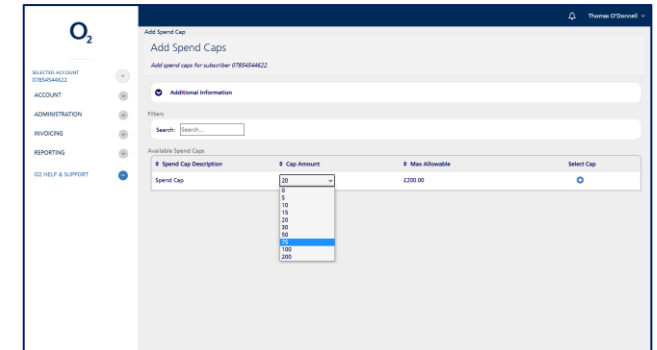
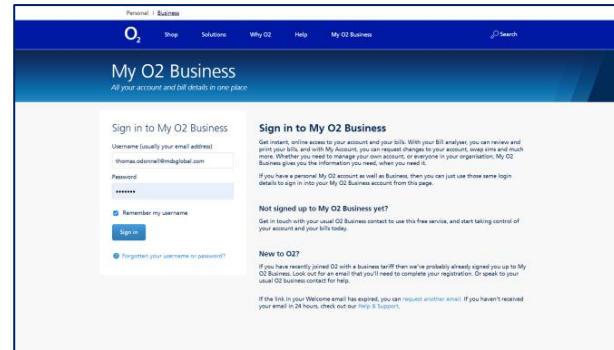
1. Log in and go to [Bill analyser](#)
2. Search for mobile phone number
3. Select [account](#) and then select Spend Cap
4. You can now view the spend cap



2.7 Account management

Spend Caps - Add

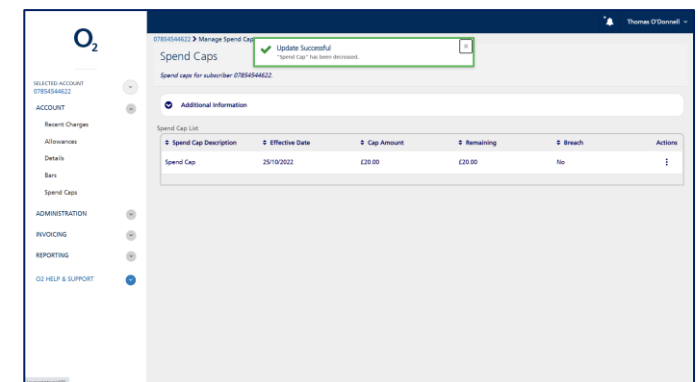
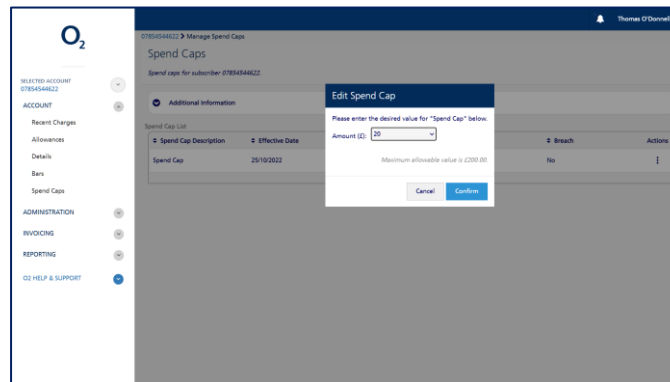
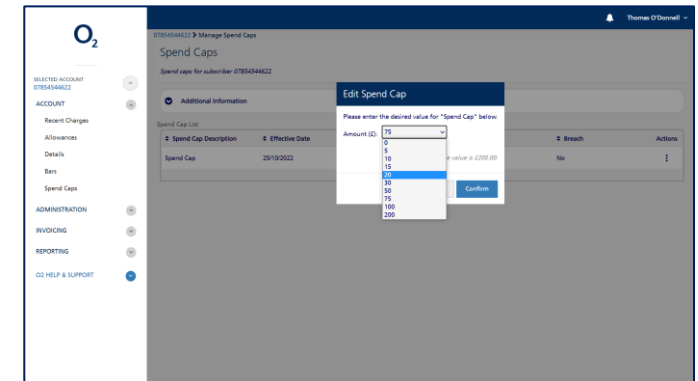
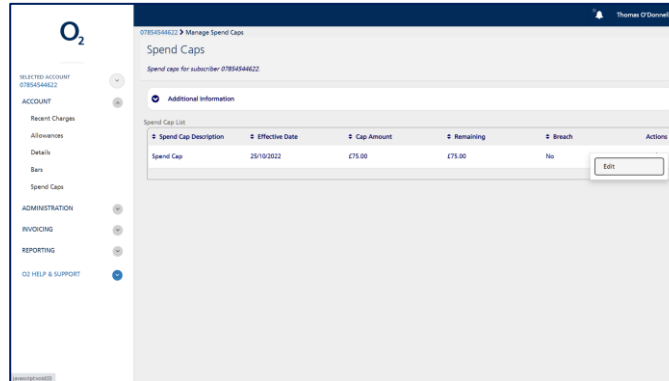
1. Log in and go to [Bill Analyser](#)
2. Search for mobile phone number
3. Select [account](#) and then select spend cap
4. Select [add spend cap](#)
5. Lists available spend cap
6. Change the value of the spend cap to your desired amount
7. Select the spend cap button and select [confirm](#)
8. You'll now see your update as successful and will return to the main spend cap page
9. You can click on additional information for details on the spend cap



2.7 Account management

Spend Caps - Edit

1. Search for the mobile phone number
2. Select **account** and then select spend cap
3. Go to the actions
4. Select **edit**
5. Select value (increase or decrease) and select confirm
6. You'll now see a message to confirm your edit has been successful and then return to the main spend cap page



Please note:

- You cannot remove a spend cap. Please call O2 Business customer service to remove a spend cap. All changes to spend caps will take up to 24 hours to complete

2.8 Account management

Details about your connections

How to do it

To view tariff information, select the connection, then 'Account' and 'Details' from the left hand navigation

Here you can also view several other pieces of information relating to that connection:

- Connection date
- Disconnection date
- Username
- SIM number (for mobiles)
- Contract end date
- Cost centre
- Billing info, and more

The screenshot displays the O2 account management interface. The left-hand navigation menu includes sections for 'MY O2 BUSINESS HOME', 'SELECTED ACCOUNT', 'ACCOUNT' (with sub-items: Recent Charges, Allowances, Details, Ban), 'ADMINISTRATION', 'INVOICING', 'REPORTING', and 'O2 HELP & SUPPORT'. The main content area shows the following details:

- Tariff:** Best for Business 1000
- Status:** Bar Failed / Stolen Bar
- Connected date:** 04/05/2020
- Disconnected date:** (blank)
- User name:** (blank)
- Number:** (blank)
- SIM number:** (blank)
- Device description:** (blank)
- Network:** O2 Mobile
- Invoice frequency:** Monthly
- Invoice cycle:** 4th of the Month
- Last invoice:** 04/04/2021
- Next expected invoice:** 04/05/2021
- Contract duration:** 12 Months
- Contract end date:** 03/05/2021
- Cost centre:** (blank)

Below the details, there is a section for 'Active Services and Discounts' with the following table:

Service/Discount	End Date	Amount
GPRS Line Access Charge	04/05/2020 - No End Date	£15.00
Line Rental Charge	04/05/2020 - No End Date	£11.91
OH Data Bundle (Rollover)	04/05/2020 - No End Date	£5.00
OH SMS Bundle	04/05/2020 - No End Date	£2.00

2.9 Reports

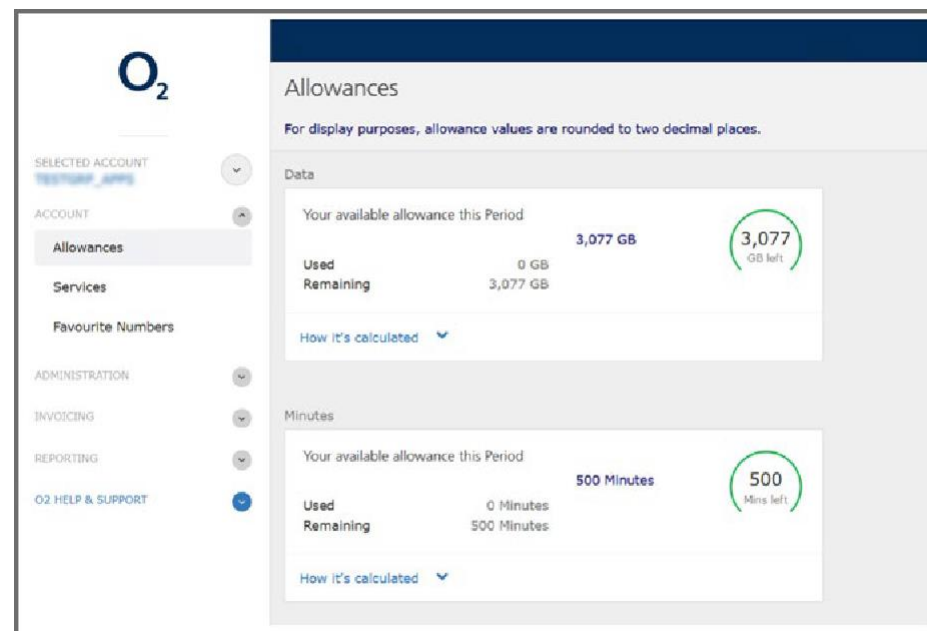
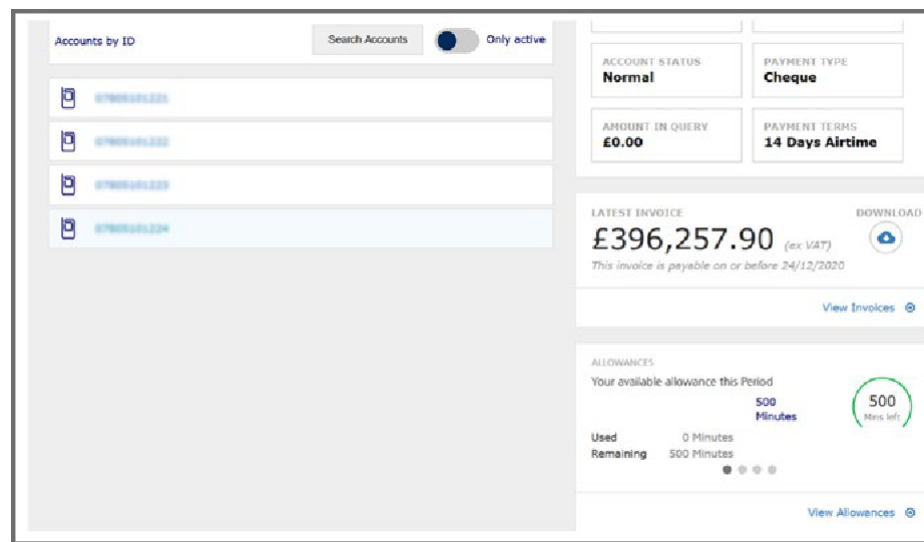
Dashboard

Key benefits

Provides a summary of spend based on the Account or pre-defined Reporting Structure chosen. See and analyse how your business uses its phones.

How to do it

1. After logging in and selecting Bill Analyser, choose the level of account desired from the accounts hierarchy list and click [Reporting](#)
2. Click the [Run Reports](#)
3. Select the date range you would like the report to cover, click the [Date Range](#) input
4. Select the date range and click [Apply](#)
5. Scroll down to [Reports](#)
6. Select the report you would like to run, e.g. Highest Spenders
7. Choose the format of the report, e.g. click PDF
8. Tick the box if you want to be notified when the report is ready. Then select either to show report, download report or email report
9. The bell icon at the top of the page, will flash when your report is ready
10. To receive a report automatically in your inbox, select 'Scheduled Reports' from the left hand navigation to set it up



2.10 Reports

What reports are available?

There are many reports that can be run and viewed immediately, downloaded, emailed or scheduled to inboxes.

View data or in chart format. Compare billing information from any 12 consecutive months over the last 2 years.

Here is a detailed breakdown of the reports available.

Report	What will it show you?
Top dialled by value	List of numbers in order of cost, from most to least expensive
Top dialled by volume	List of numbers in order of duration, from longest to shortest time
Top dialled by frequency	List of numbers in order of frequency, from highest to lowest most contacted
Highest spenders	List of numbers and names on the account, in order of cost, from highest to lowest spend
Zero usage	List of numbers with no usage
Low spenders	List of numbers and names on the account, with lowest spend
Calls by type	How your bill is broken down, by calls, texts, data, roaming etc.
Data usage	Data usage in KB. But report does not show inclusive allowances or how much data is roamed.
Billed allowances	A summary of mobile phone costs pre and post allowance, split by allowance type, with savings made and full itemisation
Cost breakdown by subscription type	Line rentals and discounts, call charges and data charges; but not what Bolt Ons or payable services they have, or if data charges are UK or roaming
Billing summary	The types of calls made at account level and the associated costs, plus account usage. Billing Summary doesn't show ex-VAT costs
Tag summary	Calls and line rental split by business or personal
Usage summary by number	A breakdown on the call types each user has made. View usage, duration and cost; how much roamed data someone has used; or how many text messages sent etc.
Itemised call	Call itemisation, but doesn't show you the country the call made from if roaming.
Flex Report	For customers on the Enterprise Flex Proposition, this allows you to track Flex Plan data pools.

*When setting up a scheduled report, your options will be:

- Report level – invoice, usage or both
- Network type – broadband, mobile, fixed, plus more

Please see page 15 for more details.

Minutes shown in seconds / Data shown in KB

2.10 Reports

Continued from page 25

Report	What will it show you?
Unbilled Usage Summary report	Select the billing level you want to report on and go to Run Reports. This will show you the most up to date unbilled usage information
My O2 Business user list	You can download a list of Bill Analyser users, and their permissions, from the User Administration menu. This feature allows Administrators to efficiently manage access, permissions and Access Points
Connections report	This report provides a view of all connections on the account, including name, sim number, tariff details, contract dates and more. Choose to download the report or send it by email
Additional subscriber details	When viewing details at subscription level, contract end date and sim number are displayed
Account Number and Name	These have been added to the following existing reports: Highest Spenders (by period and by invoice); Lowest Spenders (by period and by invoice); Zero Usage; Invoice Call Report; Data Usage; Cost Breakdown By Subscription Type; and Usage Summary by Number
Optional non-zipped file format	This feature will allow you to choose to download or email reports in a non-zipped format. This is useful if employees are not permitted to download zipped files, or if there are email/security policies that prevent zipped attachments being delivered to email recipients. The check box will be set to "Zipped" by default and you can choose a non-zipped file
Search function	You can search for the following fields in Bill Analyser: Group Name; Corporate Name; Account Name; Account Number; Phone Number; User Name; Cost Centre; and Customer Reference. You can also search by sim number
Country code	Added to the Itemised Call Report and added to the list of Filter Criteria to allow filters to be created
Unbilled Usage By Number	Provides a summary by connection, for usage which hasn't yet been invoiced. Manage overage, data usage, bundle usage, identify excessive costs such as international calls or roaming, before your invoice is produced.
Hardware	Provides a list of all the orders you've placed, for things such as for devices, SIMs, and accessories. Run this report to give you a breakdown of that information for a specific date range.
Statement of Account	Access this information at any time. It provides an immediate real time status of your account. The information available includes invoice numbers, invoice details regarding unpaid amounts and credits, and unused credit amounts.
Unbilled Spend Summary Report links to usage	Click on the unbilled value to view unbilled itemisation relating to that amount
Invoice Usage Screen – Click chart, filter usage	From the chart on the Invoice Usage screen, clicking on a section of the pie chart will filter the usage in the table below the chart

2.11 Reports

Watchpoints and watchpoint alerts

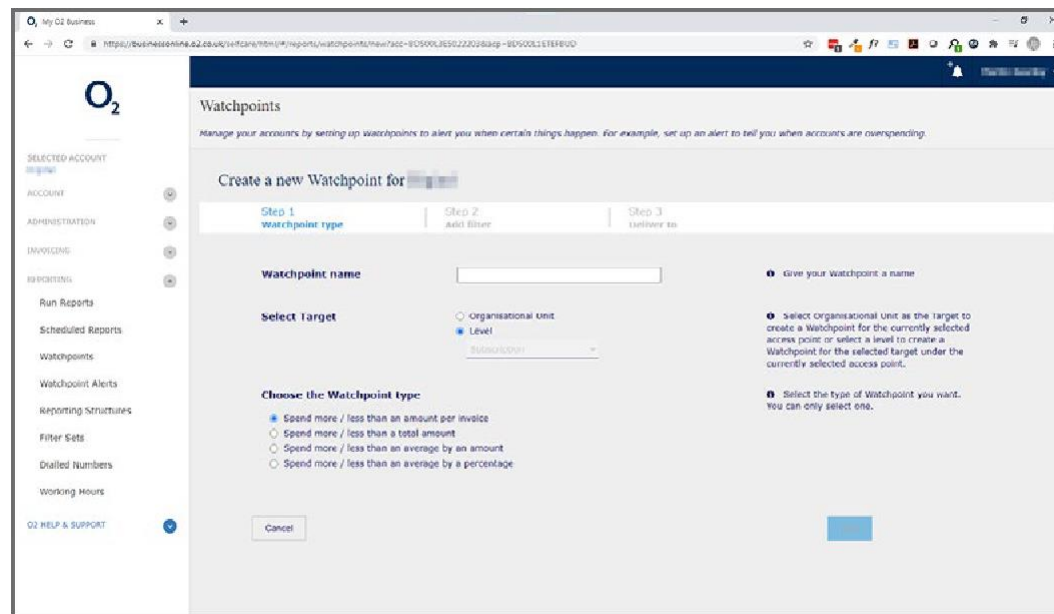
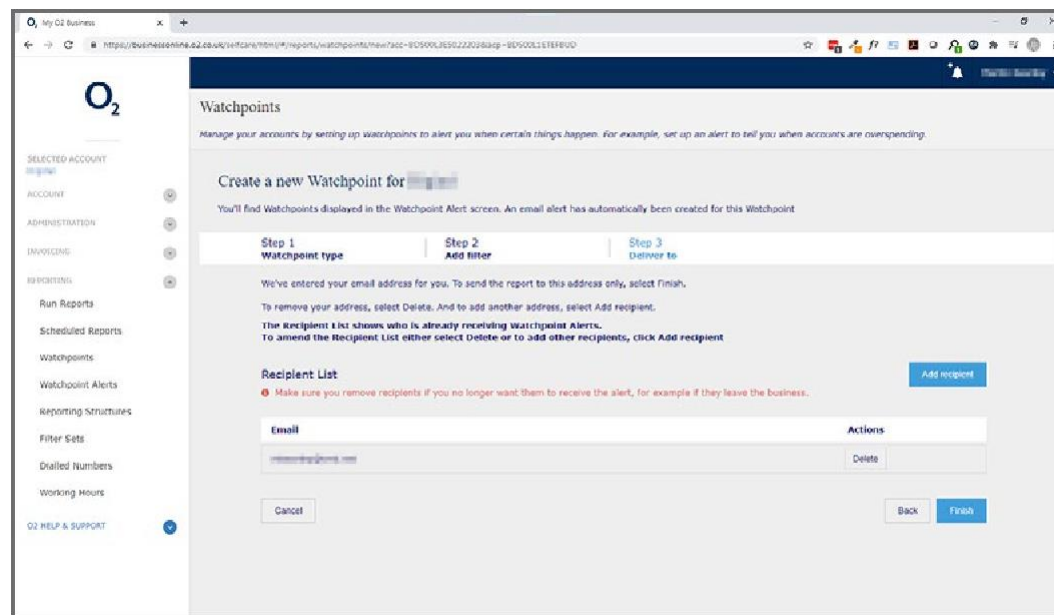
Key benefits

Allows you to set up alerts. For example, fixed-line or mobile accounts, or numbers that have spent above a certain amount.

Once the watchpoint has been set, for example any number spending more than £100 over the billing period, an alert will be sent to you by email. Sign in to view the watchpoint detail which will tell you who met the criteria you selected.

Set up a Watchpoint

1. Click [Reporting](#)
2. Click [Watchpoints](#)
3. Click [Create new Watchpoint](#)
4. Choose a name for your Watchpoint e.g. "New Watchpoint Spend"
5. Choose a target level for the Watchpoint and a Watchpoint type
6. Click [Next](#)
7. Choose the [Watchpoint Alert Period](#) (E.g. Quarterly)
8. Choose a filter (E.g. More than)
9. Choose the Amount at which the Watchpoint is triggered (E.g. £100.00)
10. Click [Next](#), add recipients (The first time you set up a new scheduled bill or report, your own email address will be pre-populated as a recipient, which you can remove if you do not wish to receive the alert)
11. Click [Finish](#)
12. You can see your alerts under [Watchpoint Alerts](#)



2.12 Reports

Scheduled reports

Key benefits

Lets you create a recurring report to run automatically and email results. Once you've created a scheduled report you can view the report or follow the on screen instructions to download it.

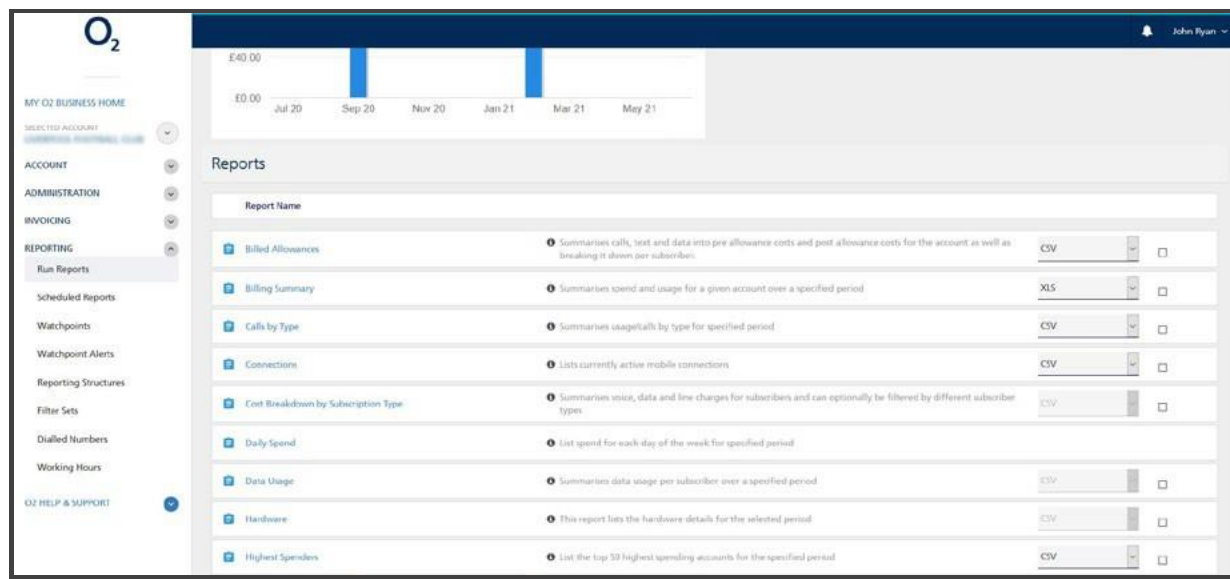
Scheduling a report

You can set the following reports to run automatically based on your requirements.

Pre-defined – most commonly requested reports, e.g. highest spenders, zero usage etc. Based on number of invoices captured within your specified date range.

Invoice CSV reports – reports presenting invoice specific information. Based on number of invoices captured within your specified date range.

Usage report – usage irrelevant of invoice. Based on your specified date range.



- After logging in and selecting [Bill Analyser](#), choose the level of account desired from the accounts hierarchy list and click [Reporting](#)
- Click [Scheduled Reports](#)
- Click the [Schedule a New Report](#) button
- Give the new scheduled report a name and fill in the other required parameters, for example how often the report should run
- When you are happy with the details you have entered, click [Next](#)
- Select one or more reports to add to your scheduled report, you can also choose which file format you would like to export it in, PDF or CSV or XLS
- When you have selected all the reports you wish, click [Next](#)
- You may have the option for adding additional filters on this screen, enter if applicable and click [Next](#)
- To add email recipients, click [Add recipient](#). The first time you set up a new scheduled bill or report, your own email address will be pre-populated as a recipient. Untick the box if you want to receive the report(s) in a non-zipped format
- In the Email recipients field, enter the email address of the recipient and click [Add Now](#). You can repeat this step to add more recipients
- Click [Finish](#) to create the Scheduled Report
- Your new Scheduled Report has been saved, ready for emailing on the day set in step 3. There are a few options available to you after you have created the report, click [More Actions](#)
- Here you can copy, edit and delete the details of the scheduled report

2.13 Reports

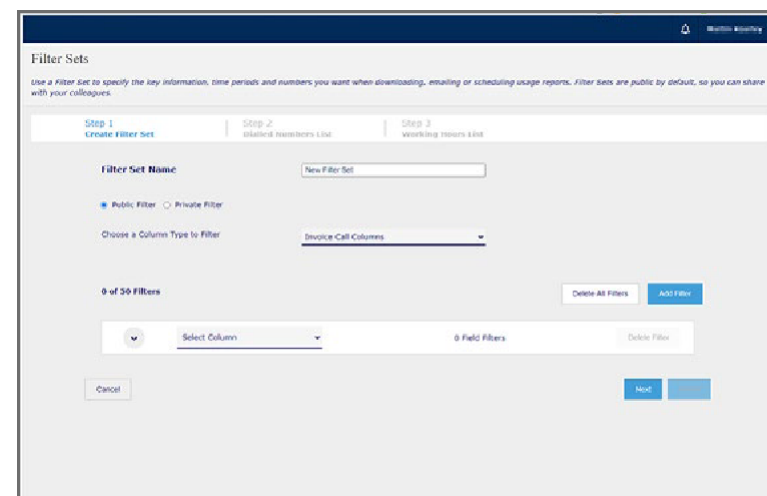
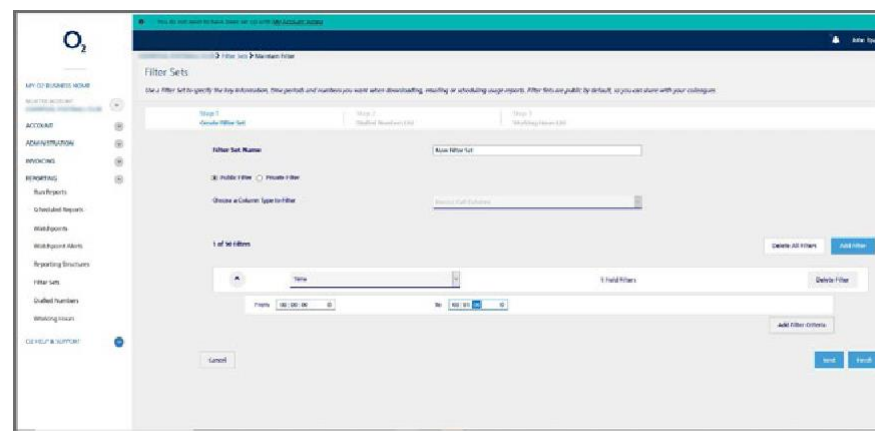
Filter sets

Use filter sets to filter usage reports to look at specific call types, dates, destinations, costs, numbers dialled and more.

You can use the additional dialled numbers or working hours lists for the report, eg to see calls made out of office hours. If you want to apply dialled numbers and working hours lists, you need to first create these.

Create a new filter set

1. After logging in and selecting **Bill Analyser**, choose the level of account desired from the accounts hierarchy list and click **Reporting**
2. Click **Filter Sets**
3. To create a new filter set, click the **Create a New Filter Set** button
4. Type in a name for the new Filter set. E.g. New Filter Set
5. Scroll to the filter you want to activate from the **Select Column** drop down menu
6. Enter the required details, e.g. the time parameters you wish to filter
7. To add another filter parameter to the new Filter set, click **Add Filter**
8. To add **Dialled Numbers** or **Working Hours** lists to this filter set click **Next**
9. Use the drop down menu to include or exclude any Dialled Number lists
10. Click the checkbox to add the desired Dialled List
11. Click **Next**
12. Use the drop down menu to include or exclude a Working Hours List
13. Click the checkbox to add the desired Working Hours List
14. Click **Finish**
15. That's it! Your new filter set will be created. This filter set will now be available to you from the Filters Sets menu



2.14 Reports

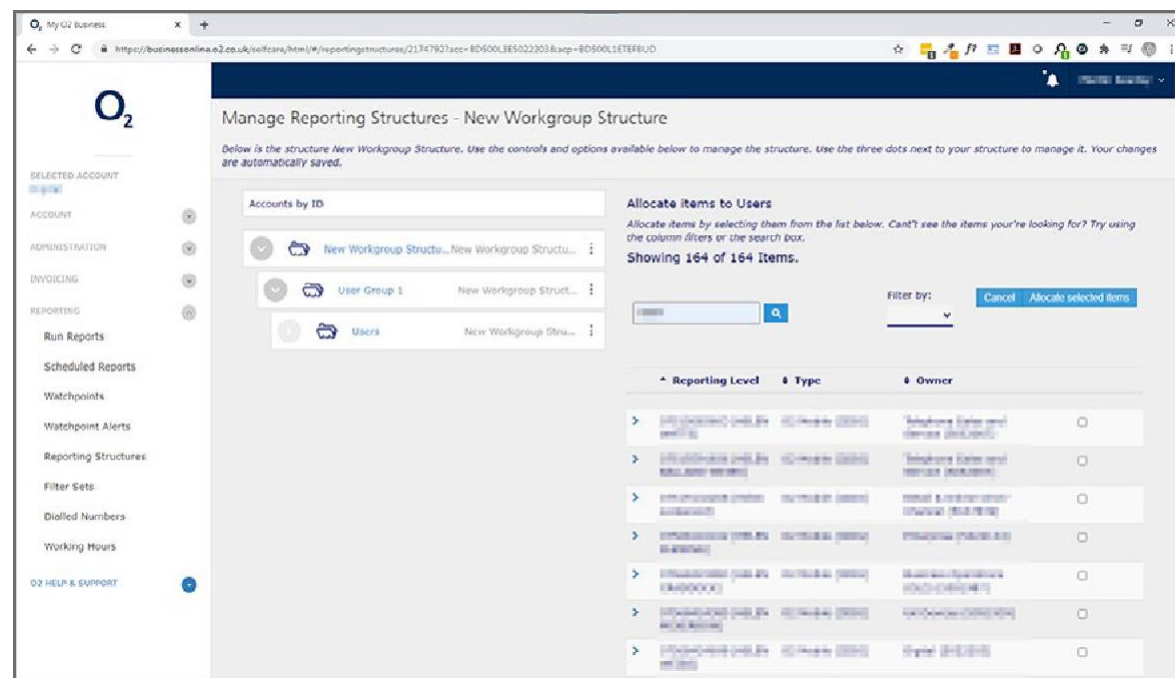
Reporting structures

Key benefits

Create new reporting structures that are right for your business. By creating a reporting structure you can run the reports visible in your dashboard screen against this structure.

Create a new reporting structure

1. After logging in and selecting Bill Analyser, you'll see the Account management page
2. Click [Reporting](#)
3. Click [Reporting Structures](#)
4. To create a new reporting structure, click [Define New Structure](#)
5. Give your new reporting structure a name and click [Continue](#)
6. To add a sub-folder below your new structure, click the [Actions](#) icon
7. Click [Insert](#)
8. Name your new folder and click [Add](#)
9. You can have 8 levels with multiple folders and numbers below each other, to create another sub-folder inside the last, click the Actions icon next to the desired level. E.g. User group 1
10. Click [Insert](#)
11. Name the new folder and click [Add](#)
12. Now you have a folder structure you can allocate your numbers e.g. mobile / broadband / landline. Click the Actions icon next to the desired level. E.g. Users
13. Click [Allocate](#)
14. Select all accounts you wish to add



15. To search for specific details use the Search and Filter by functions at the top of the screen
16. Click [Allocate](#) selected items
17. The numbers have now been added in the relevant folder inside the Reporting Structure
18. The Reporting Structure will automatically save changes. To edit a reporting structure, click the [Actions](#) icon, next to the desired reporting structure and click [Edit](#)
19. Your new Reporting Structure will now be visible in the Account Management page, when the View Reporting Structures toggle is enabled

2.15 Invoices

All invoices and current transactions

Key benefits

All your invoices and current transactions are all in one place, whenever you need them. You can also view, print or download an invoice. Or even schedule a summary bill to be sent straight to your inbox, every time it's produced.

Please note: VAT invoices can almost always be found at Account level. However, if the partial invoice column has a tick, go up a level in your account structure to view a VAT invoice.

View an invoice

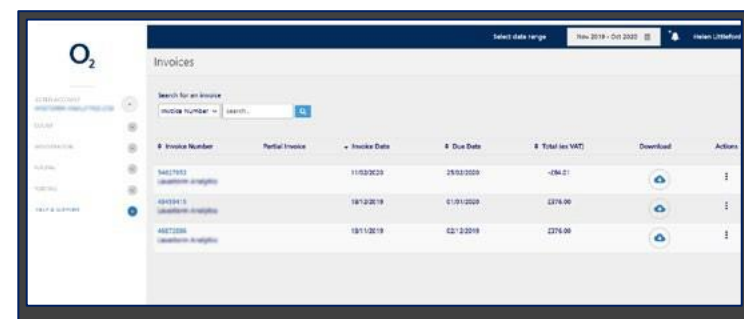
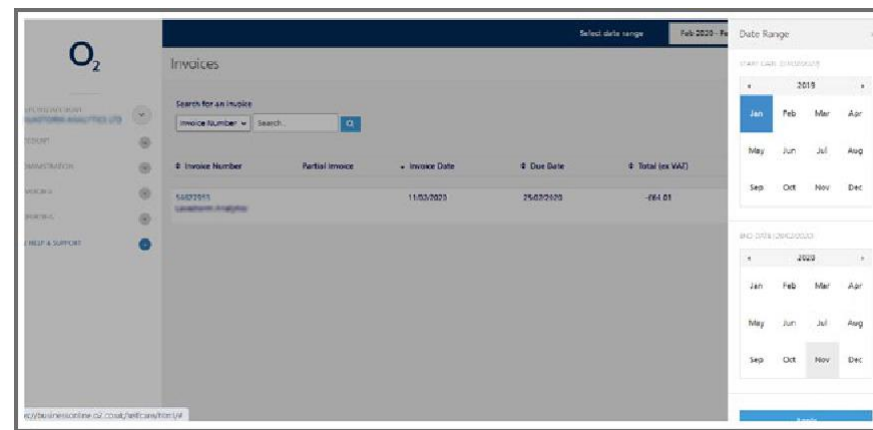
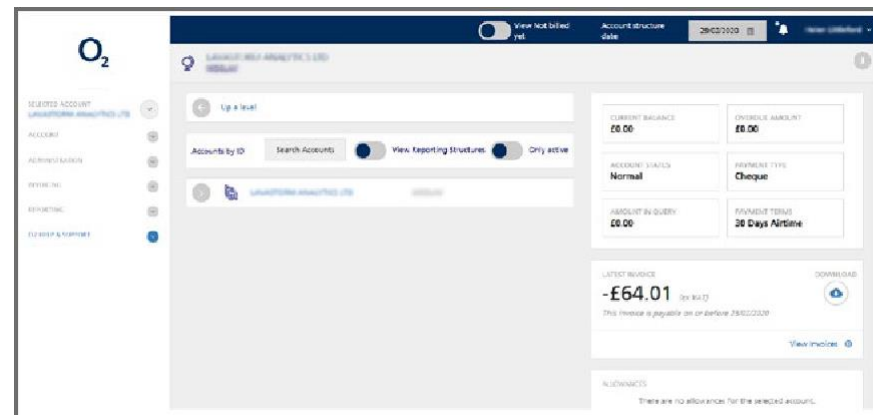
1. After logging in and selecting [Bill Analyser](#), choose the level of account desired from the accounts hierarchy list
2. Click [View Invoices](#)
3. Alternatively you can click [Invoicing](#) then [View Invoices](#)
4. The invoice details will be displayed. To view the invoice of an account, click the desired invoice
5. The invoice details will be displayed

Download your latest invoice

1. After logging in and selecting [Bill Analyser](#), choose the level of account desired from the accounts hierarchy list
2. Click the download icon (cloud)
3. The invoice will be generated
4. To immediately view the invoice, click ['Invoice Ready'](#) when the pop up message appears
5. Alternatively to view the generated invoice at a later time, click the [Notifications \(bell\) icon](#)
6. Click the desired invoice to view
7. To download, click the [download icon](#) in your PDF viewer

Email an invoice

1. Select the invoice you want to send by email
2. Click on the [download/cloud](#) icon and select the type of invoice
3. Select ['email options'](#). Your email address will be pre-populated. You can remove it, or add other email addresses.
4. To download, click the download icon in your PDF viewer



2.16 Administration

User administration

Key benefits

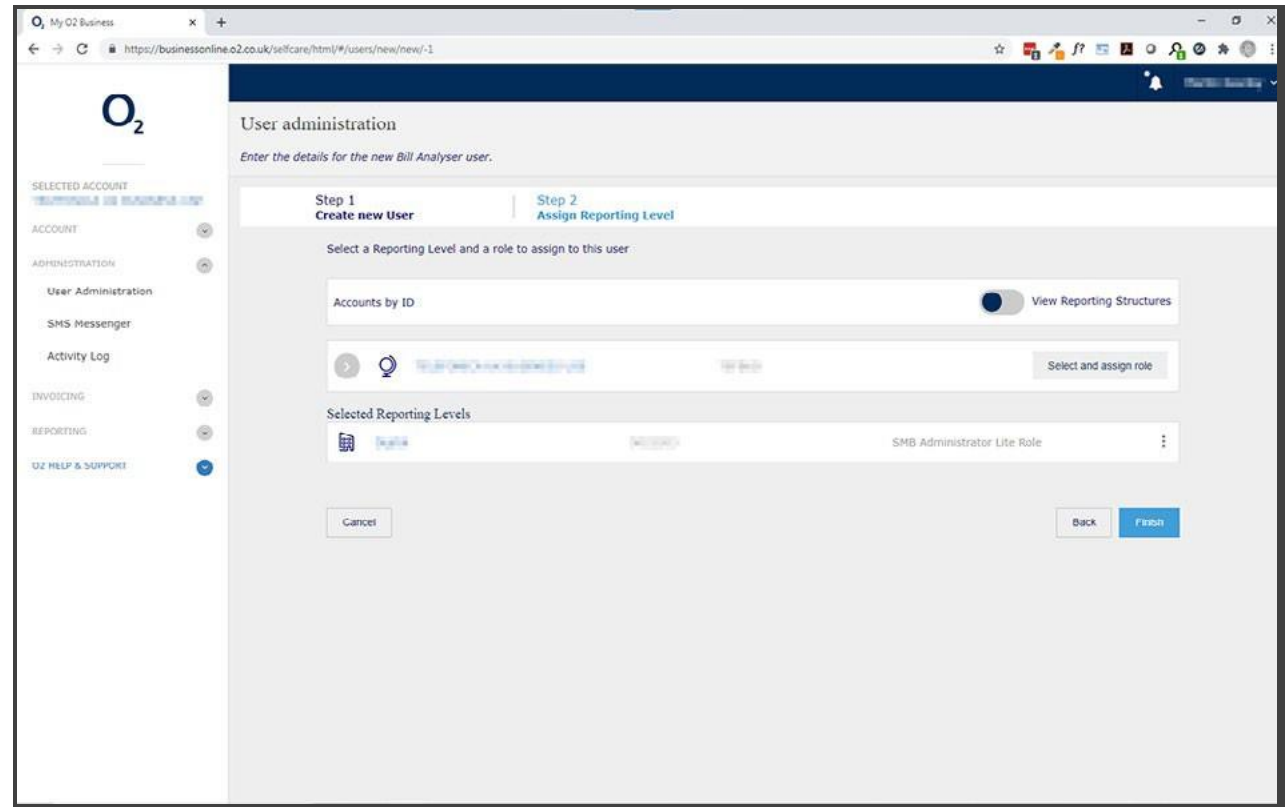
Create new users, manage access and look at their activity.

Create a new user

1. Go to [Administration](#) and select [User administration](#)
2. Click [Create a New user](#) and enter the details of the user
3. Select the type of access they need (administrator or end user) and select [next](#)
4. Select the access you wish to provide them with and finish
5. To edit a user, select the 3 dots on the right hand side of their row, select edit and update as relevant

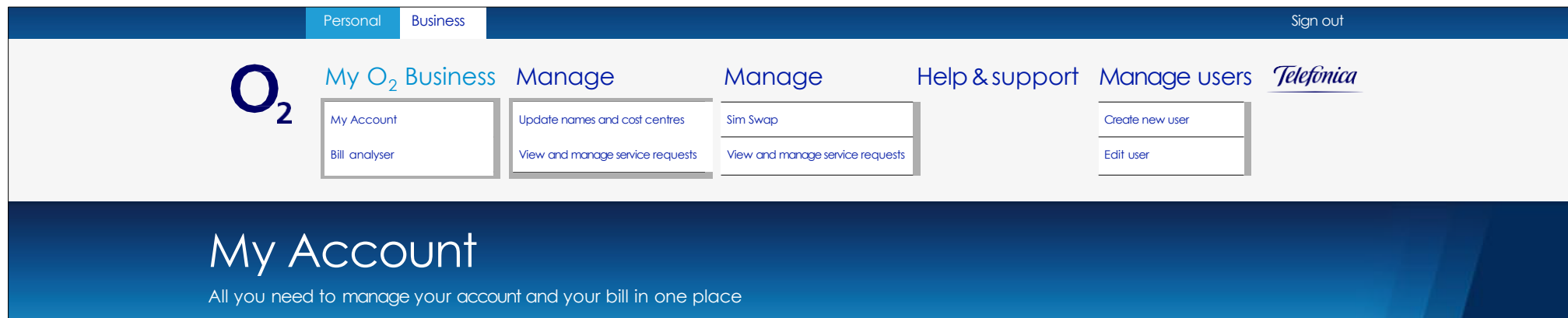
Edit a new user

1. Go to [Administration](#) and select [User administration](#)
2. Select the user you wish to edit
3. Go to the [More actions](#) drop-down
4. Click [Edit](#)
5. Make the relevant changes
6. Click [Submit](#)



3.1 My Account homepage

From the My Account homepage you can access all the services from the drop-down menu in the navigation bar or use the quick access links further down the page.



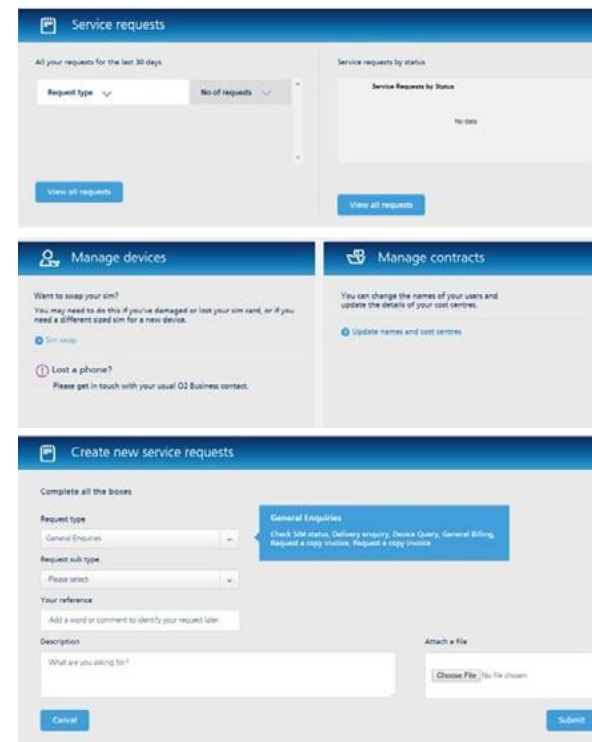
Here are your quick access links found within My Account. See to the right for a zoomed in view.

Service requests
Summary of the status and 6 months' history of account changes

Manage devices
Quick access to common My Account device services

Manage contracts
Quick access to common My Account contract services

Create new service requests
Make account changes using the drop-down menus in this section



Note: Click on a drop-down or a quick link above for more information.

3.2 Manage contracts

Update names and cost centres

Key benefits

Have instant access to see which company mobile numbers are allocated and which are free.

Assign an existing mobile number to a new or different employee instantly – great if you need to print their business cards quickly, and very useful if your business has high turnover of staff.

Set up and swap numbers between cost centres, especially useful if allocating budgets to different cost centres.

Facility to add a reference name, number or description to aid easy identification when viewing previous or outstanding service requests.

How to do it

1. Go to [Manage contacts](#) and select [Update names and cost centres](#)
2. Enter a reference (if required)
3. Type in the new user name and click [Change user](#)
4. Type in a cost centre (if required)
5. Click [Go to review request](#)
6. Check details and click [Submit request](#)
7. Use the generated reference number to track the service request

The screenshots illustrate the 'Update names and cost centres' process in the O2 Business portal. The first screenshot shows the 'Request changes' form with a table of mobile numbers and user names. The second screenshot shows the 'Review and submit' step with a table of mobile numbers, user names, and cost centres. The third screenshot shows the 'Thanks - we've got your request' confirmation page with a service request number.

Request changes

Tell us which user names or cost centres you'd like to change.

- Type to change an existing user's name.
- To move a number to another user, also click the 'Change user' button.

Your reference

Add a word or comment to identify your request later.

Mobile number	User name	Change to another user	New cost centre
0780000000	<input type="text"/>	Change user	<input type="text"/>
0780000000	Paula	Change user	<input type="text"/>
0780000000	George	Change user	<input type="text"/>
0780000000	John Doe	Change user	<input type="text"/>
0780000000	John	Change user	<input type="text"/>

[Undo changes](#) [Cancel](#) [Go to review request](#)

Review and submit

Check your details before you submit your request.

Your request reference:

Mobile number	User name	Change to another user	New cost centre
0780000000	John	Yes	<input type="text"/>

[Back](#) [Cancel](#) [Submit request](#)

Thanks - we've got your request

for changes to your user name or cost centre.

Your service request number:

02710108

We'll make your changes within 24 hours.
Check your service request summary for updates.
We'll contact you if you need any further details.

[Back to My Account](#) [View service requests](#)

3.3 Manage devices

Sim swap

Key benefits

Upon receiving a new sim you have the ability to swap to the new sim efficiently without having to phone your usual ☎ Business contact.

Facility to add a reference name, number or description to aid easy identification when viewing previous or outstanding service requests.

How to do it

1. Go to [Manage devices](#) and select [Sim swap](#)
2. Enter a reference (if required)
3. Enter the new sim number in the last 3 empty boxes
4. If changing sim type click [Yes](#) otherwise click [No](#)
5. Click [continue](#)
6. You will now be taken through a security step. Select the mobile number you wish a one time PIN to be sent to. Make sure you have access to the number as you'll have 90 seconds to enter the PIN onto the website
7. Once you've entered the PIN, click [Continue](#)
8. Check details and click [submit request](#)
9. Use the generated ...

Please note:

- Leave the existing 6 numbers in the first box and only fill in the other 3 boxes

Sim swap
Moving your details to a new sim card.

1 Add request details 2 Review and submit

Complete the details for your sim swap

Your reference
Add a word or comment to identify your request later.

Mobile number	User name	New sim number	Changing your phone type? (eg Apple to Android)
07 994411		994411	Yes No
07 994411	John	994411	Yes No
07 994411	George	994411	Yes No
07 994411	Michelle	994411	Yes No
07 994411	Adam	994411	Yes No

Cancel Continue

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Sim swap
Moving your details to a new sim card.

Thanks - we've got your request
The changes to your user name or user name.

Your service request number:
02710108

We'll make your changes within 24 hours.
Check your mobile request carefully for details.
We'll contact you if we need any further details.

Back to My Account View similar requests

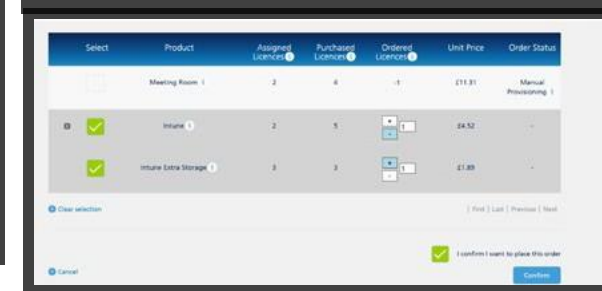
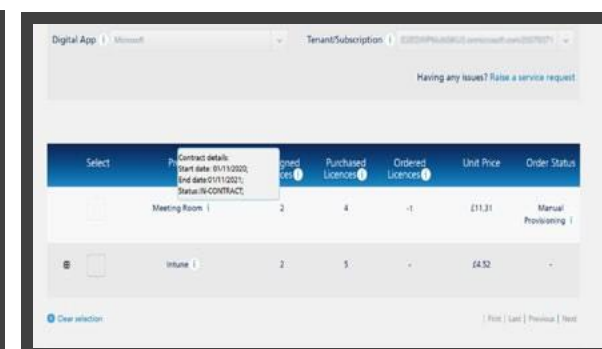
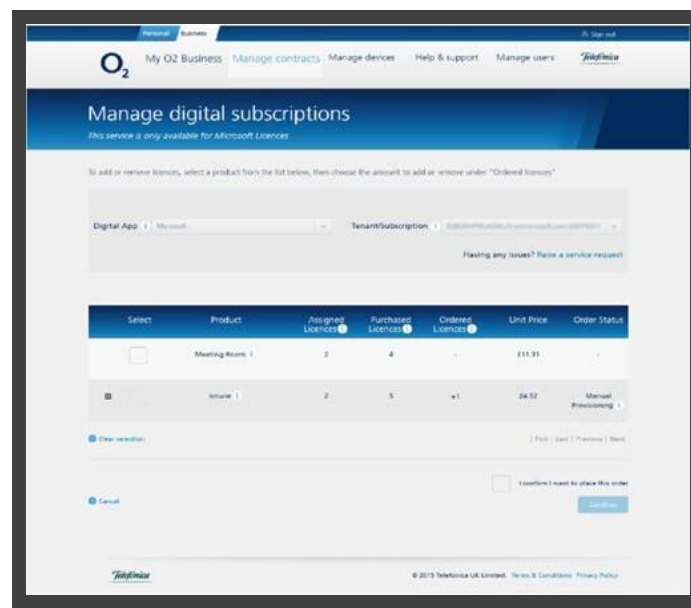
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3.4 Manage your digital subscriptions

Available for Enterprise customers with digital subscriptions

How to do it

1. Log in and go to [My Account](#)
2. Select 'Manage contracts' and then 'Manage digital subscriptions'
3. You can see the details and status of your digital subscriptions. Hover over the information icons for further information
4. Tick the box to select the digital subscription you wish to update
5. In the 'ordered licences' column, select + to add more subscriptions or – to remove them, then add the number you wish to add or remove
6. Check details, tick the box to confirm you wish to place the order and select 'confirm'
7. Use the generated reference number to track the service request
8. The Digital Subscriptions page will be updated on the following day
9. Should you wish to raise a query with the team, you can do so via the Manage digital subscriptions page



3.5 Manage contracts / Manage devices

Create new service requests

Key benefits

Create a service request to make changes to Bars and Bolt Ons, request PAC or PUK codes, place an order or make a general enquiry e.g. general billing.

How to do it

1. Go to [Manage contacts](#) or [Manage devices](#) and select [Create new service request](#)
2. Select your [request type](#) using the drop-down
3. Select your [request sub type](#) using the drop-down
4. Enter a reference (if required)
5. Enter a detailed description of your request
6. Check details and click [submit request](#)
7. Use the generated reference number to track the service request

For PAC code requests you will be taken through a security step. Select the mobile number you wish a one time PIN to be sent to. Make sure you have access to the number as you'll have 90 seconds to enter the PIN onto the website

Once you've entered the PIN, [click Continue](#)

Request Type	Request Sub Type
Manage bolt ons	Add or remove a bolt on
General enquiries	Check sim status Delivery enquiry Device query General billing Request a copy invoice
PAC and PUK codes	Get a PAC code to port a number Get a PUK code to unlock a device
Place an order	24 hour replacements after 12pm 24 hour replacements before 12pm Add a new connection or activate a new connection Add an O2 Boostbox Place an order after 12pm Place an order before 12pm Check device stock levels before placing your order

3.6 Manage contracts / Manage devices

View and manage service requests

Key benefits

View all service requests from the last 6 months in one place. Check the status of a request to see when it's been completed.

Allows the account holder to view service requests made by additional administrators leaving them free to deal with the day-to-day stuff while still keeping an eye on what's going on generally.

Search facility allows you to easily find a specific service request. Search for single or grouped service requests, by service request number or customer reference, you can also filter by date.

View a summary or the full service request details.

How to do it

1. Go to [Manage contacts](#) or [Manage devices](#) and select [View and manage service requests](#)
2. Use the search, filter or page scroll to find the service request
3. Click the [Service request number](#) for full request details

Please Note:

- Changes cannot be made from this screen. Go to the relevant page from the drop-down to make changes

The left screenshot shows the 'Service requests' overview page. It features a navigation bar with 'Personal' and 'Business' tabs, and a 'Sign out' button. The main heading is 'Service requests' with a sub-heading 'Check your requests and their status'. Below this, it says 'All your service requests from the last 6 months' and provides search instructions. A search bar and a 'Filter by date' dropdown are present. A table lists service requests with columns for 'Service request', 'Customer reference', 'Case Submitted by', 'Request type', 'Request sub-type', 'Status', and 'Date raised'. Two requests are visible, both with status 'Closed'.

The right screenshot shows the 'Service request' details page. It has the same navigation bar. The heading is 'Service request' with a sub-heading 'Check your service request details'. The 'Request details' section shows: Service request number: 02719168, Request type: Change, Service request status: In Progress, Request created by: [redacted], Request sub-type: Change subscriber name/lost centre, and Date: 28/10/2014 10:00 AM. The 'Service request comments' section has a form for adding comments. The 'Change details' section shows a table with columns: Subscriber name, Mobile phone number, Old cost centre, New cost centre, New subscriber name, and Request status. The 'Attachments' section has a table with columns: File name, File description, Size, and Last modified, and a 'Attach file' button.

3.7 Manage users

Create new user

Key benefits

Allows you to create new administrators or end users with their own unique username and password.

This helps traceability and allows the management to decide on the user access rights.

Types of user

An administrator can: view and manage service requests, sim swap, update names and cost centres, create and edit users, create service requests.

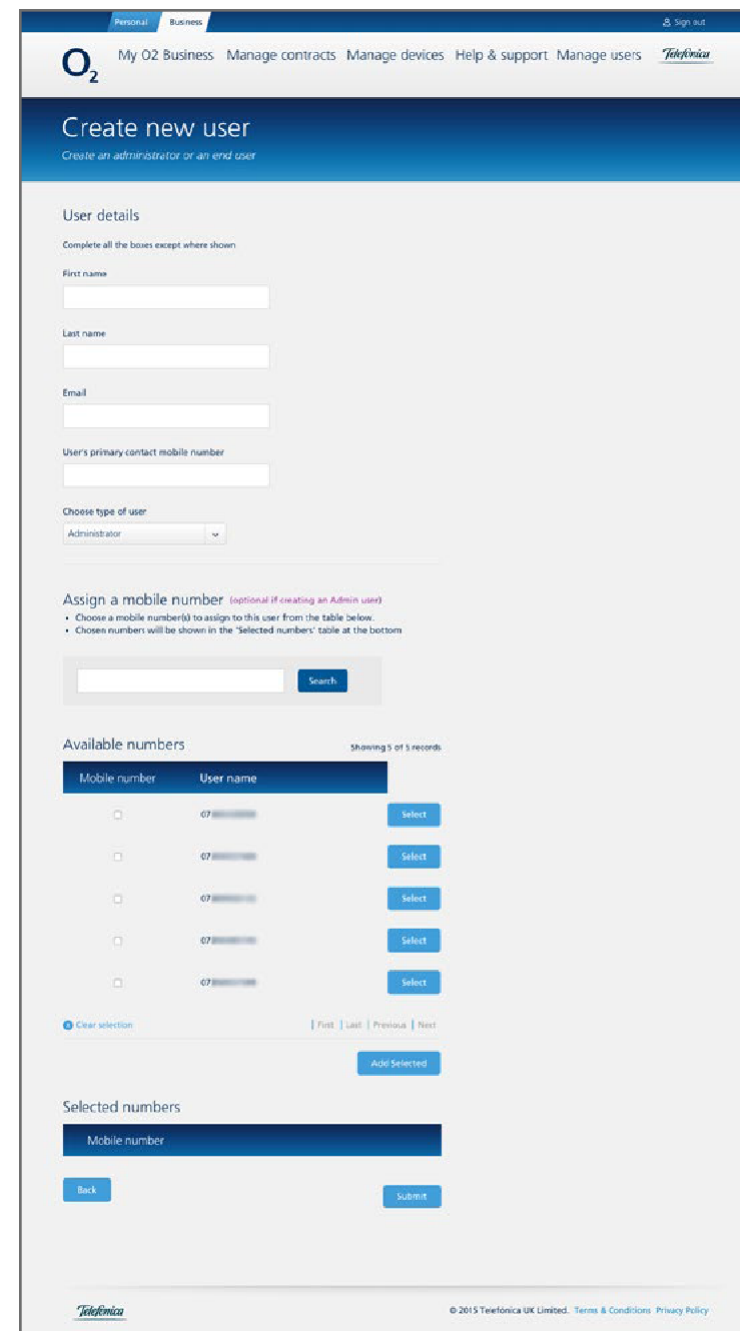
An end user can: create service requests and view all service requests.

How to do it if you're an administrator

1. Go to [Manage users](#) and select [Create new user](#)
2. Enter all [User details](#)
3. Choose [User type](#) (see above)
4. Assign a mobile number from the list, Click [Select](#)
5. Click [Add selected](#)
6. Check details and click [submit](#)
7. Use the generated reference number to track the service request

Please note:

- Selecting a mobile number is optional if creating an administrator
- Depending on how your account has been set up on our system, you may need a special licence to be able to view the whole group in My Account. If you can't see all of your subscriptions, get in touch with your usual  Business contact who can arrange the licence for you. Please note that if a user hasn't logged in to My  Business for more than 6 months, the licence will be reallocated and My Account access removed
- From early 2022, administrators with a special licence will be able to provide access to users at any level of your account.



The screenshot shows the 'Create new user' page in the My Account portal. The page has a blue header with the O2 logo and navigation links: 'My O2 Business', 'Manage contracts', 'Manage devices', 'Help & support', 'Manage users', and 'Telefonica'. Below the header, the page title is 'Create new user' with a subtitle 'Create an administrator or an end user'. The main content area is divided into sections:

- User details:** A form with fields for 'First name', 'Last name', 'Email', and 'User's primary contact mobile number'. Below these is a 'Choose type of user' dropdown menu currently set to 'Administrator'.
- Assign a mobile number:** A section with a search bar and a 'Search' button. Below it, a table titled 'Available numbers' shows a list of mobile numbers with 'Select' buttons next to each. The table has columns for 'Mobile number' and 'User name'. Below the table are navigation links: 'Clear selection', 'First', 'Last', 'Previous', and 'Next', and an 'Add Selected' button.
- Selected numbers:** A section with a 'Mobile number' field and 'Back' and 'Submit' buttons.

The footer of the page includes the 'Telefonica' logo and the text '© 2015 Telefonica UK Limited. Terms & Conditions Privacy Policy'.

3.8 Manage users

Edit user

Key benefits

Allows you to edit an administrator or end user, activate or deactivate their account or change the user type and access rights.

Types of user

An administrator can: view and manage service requests, sim swap, update names and cost centres, create and edit users, create service requests.

An end user can: create service requests and view all service requests.

How to do it if you're an administrator

1. Go to [Manage users](#) and select [Edit user](#)
2. Click [Edit](#)
3. Choose [User type](#) (see above)
4. Make any relevant changes
5. Check details and click [submit](#)
6. Use the generated reference number to track the service request

Please note:

- If a user is deactivated – they won't have access to My Account

The screenshot shows the 'Edit My O2 Business User' page. At the top, there's a navigation bar with 'My O2 Business', 'Manage contracts', 'Manage devices', 'Help & support', and 'Manage users'. Below the navigation bar, the page title is 'Edit My O2 Business User'. The main content area says 'Choose the user you want to amend.' and 'Showing 1 to 2 of 2 records'. There is a table with columns: First Name, Last Name, Email, User Type, and Active. Two rows are visible, each with an 'Edit' button. At the bottom, there is a 'Cancel' button and a footer with '© 2015 Telefónica UK Limited. Terms & Conditions. Privacy Policy'.

The screenshot shows the 'Edit My O2 Business User' page with the user details form. At the top, there's a navigation bar with 'My O2 Business', 'Manage contracts', 'Manage devices', 'Help & support', and 'Manage users'. Below the navigation bar, the page title is 'Edit My O2 Business User'. The main content area says 'Change your user's details below then click submit'. There are input fields for 'First name' and 'Last name'. Below that is a 'Type of user' dropdown menu set to 'Administrator'. There are 'Active' and 'Deactivate' buttons for 'User status'. Below that is a 'Mobile number(s) for this user is shown below' section with a 'Remove selected' button. There is a search bar for 'To allocate more Mobile number(s) for this user use the search and table below:'. Below the search bar is a table titled 'Your available numbers' with columns 'Mobile Number' and 'Assigned To'. There are five rows, each with a radio button and a 'Select' button. At the bottom, there are 'Back', 'Cancel', and 'Submit' buttons. A footer with '© 2015 Telefónica UK Limited. Terms & Conditions. Privacy Policy' is visible.

4.1 Help and support

For help and support visit o2.co.uk/myo2business

- [Watch the introductory video – learn all you need to know about My ø Business](#)
- [View our demo – follow step-by-step video tutorials](#)
- [Access My ø Business FAQs](#)
- [Chat to us online – start a live chat session with an advisor](#)
- [Watch our customer video case study to see how My ø Business can help your business](#)