My O_2 Business

Our user guide for Medium
and Business Enterprise customers.

Updated November 2022

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1.1 What is My O_2 Business?

My O_2 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 O_2 Business to access Bill Analyser and My Account.

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

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

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 O_2 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.

<table>
<tr><th>In Bill Analyser you can</th><th colspan="2">In My Account you can</th></tr>
<tr><td>View, download and email bills (brief summary, in detail or itemised)</td><td colspan="2">You can track the progress and 6 months' history of these account change requests, in My Account under "Service Cases"</td></tr>
<tr><td>Schedule bills to be sent to your inbox</td><td colspan="2">Perform sim swap</td></tr>
<tr><td>View unbilled usage and remaining allowance information</td><td colspan="2">Manage users by changing user names and cost centres</td></tr>
<tr><td>View and schedule bills on your device</td><td colspan="2">Change users of the account</td></tr>
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<tr><td>Analyse spending by running, scheduling and downloading reports on billed usage</td><th>Request type</th><th>Request sub type</th></tr>
<tr><td>Tag calls as either business or personal</td><td>Manage Bolt Ons</td><td>Add or remove a Bolt On</td></tr>
<tr><td>View history of bills, payments and credits</td><td rowspan="2">General enquiries</td><td rowspan="2">Check sim status
Delivery enquiry
Device query
General billing
Request a copy invoice</td></tr>
<tr><td>View, add and remove bars from individual connections on your account*</td></tr>
<tr><td>Upload and manage an address book</td><td>PAC and PUK codes</td><td>Get a PAC code to port a number
Get a PUK code to unlock a device</td></tr>
<tr><td>Set up and view billed watchpoints</td><td rowspan="3">Place an order</td><td rowspan="3">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</td></tr>
<tr><td>As an administrator, send text messages to mobile users on the account</td></tr>
<tr><td>View, Edit and Add Spend Caps</td></tr>
</table>

1.3 Registration and signing in

Who can use My O_2 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 O_2, 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 O_2 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 O_2 Business contact.

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

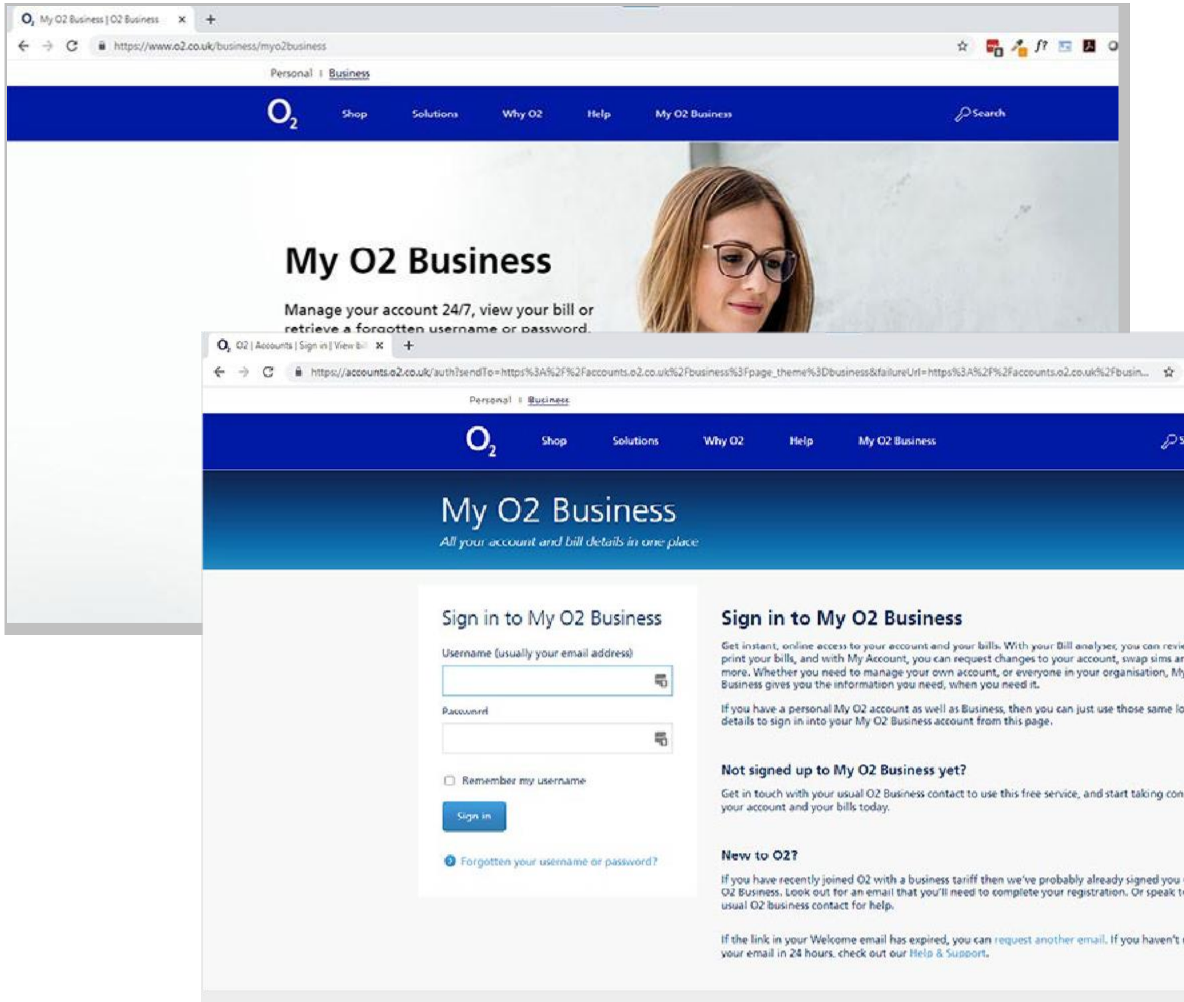
An end user can: view their portion of the bill and analyse their own spend, including tagging usage as business or personal. View account information for your own phone number.

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 O_2 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 O_2 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 O_2 Business contact.

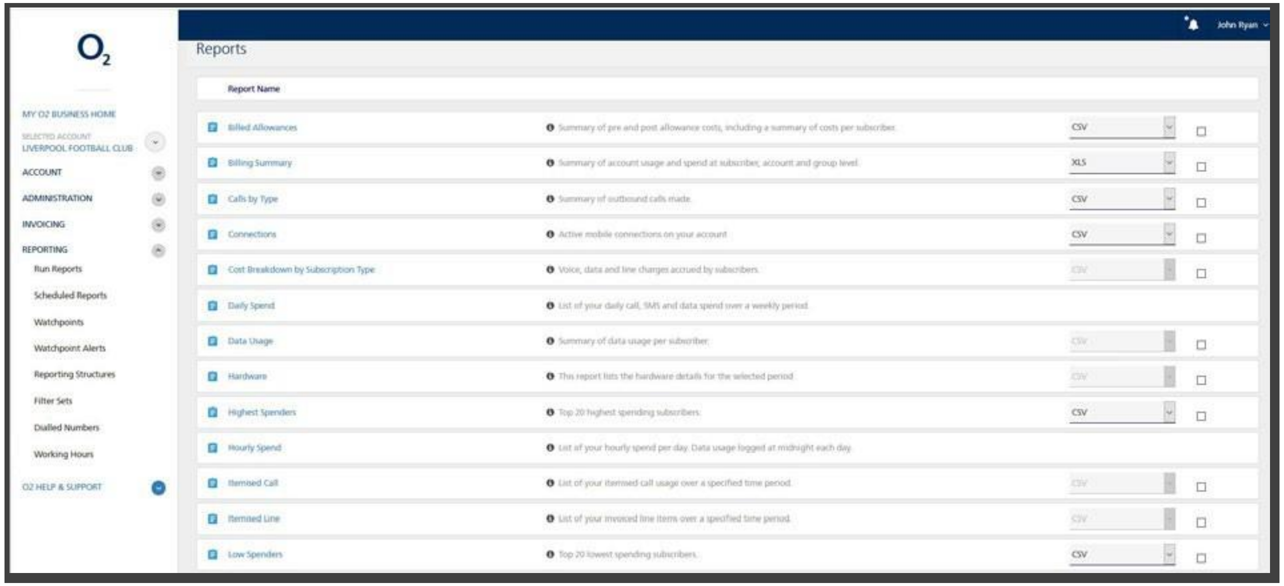
How to do it

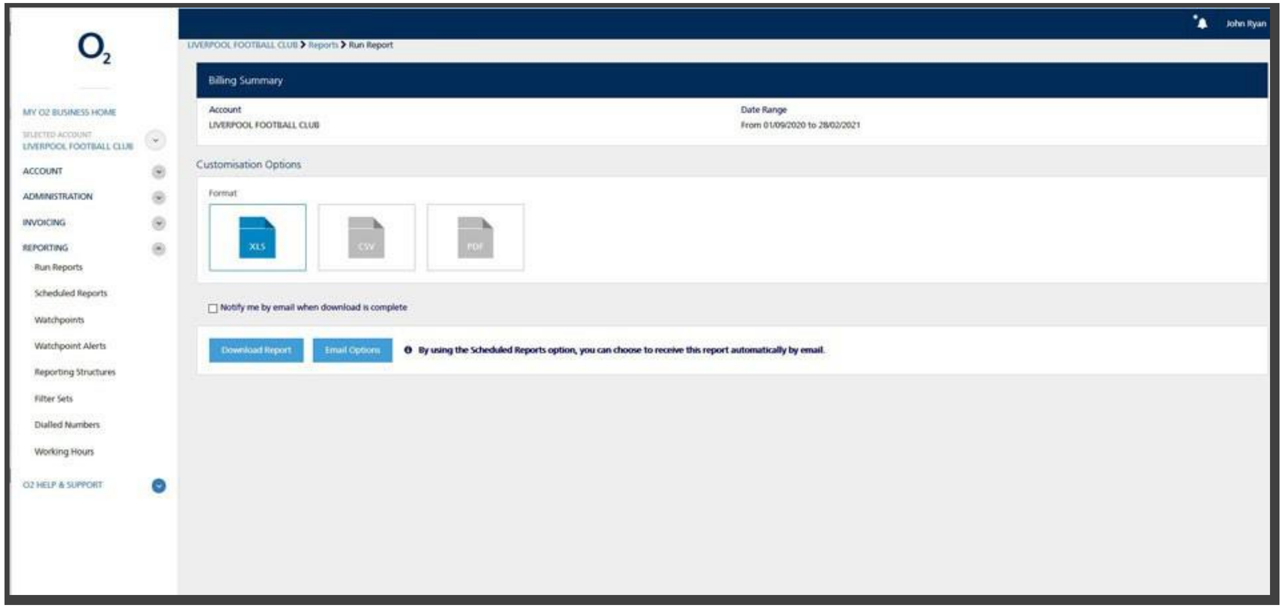
Click on your email address to update your contact details or change your password, secret question and answer. View helpful information by selecting 'Get Help' or 'View Demo'?

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

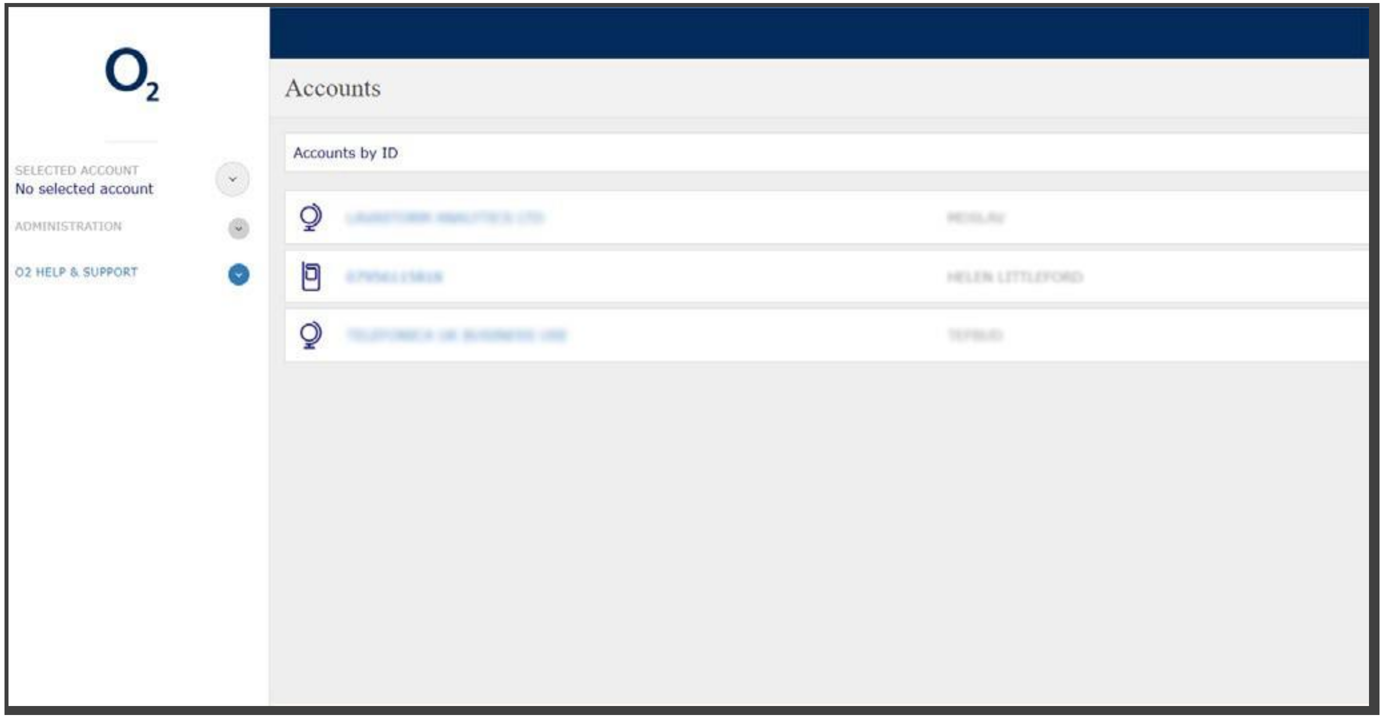
Summary

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



2.3 Account management

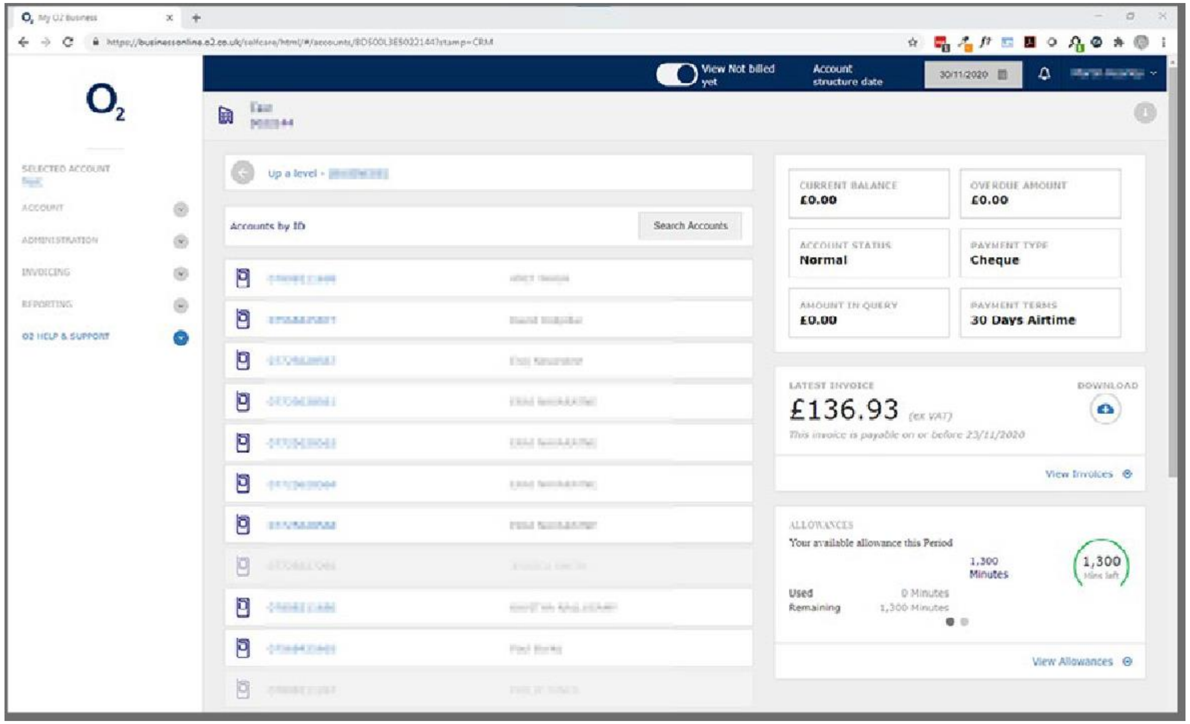
Summary

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



2.4 Account management

SMS Messenger

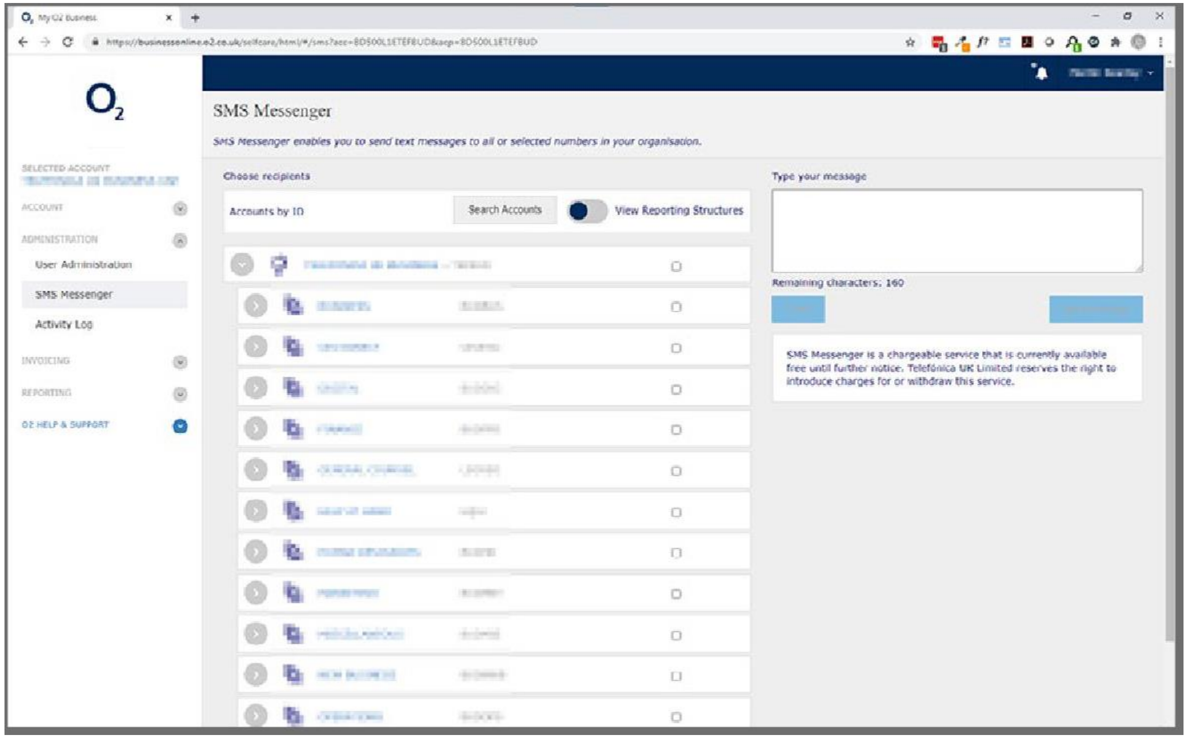
AVAILABLE TO ACCOUNT ADMINISTRATORS

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

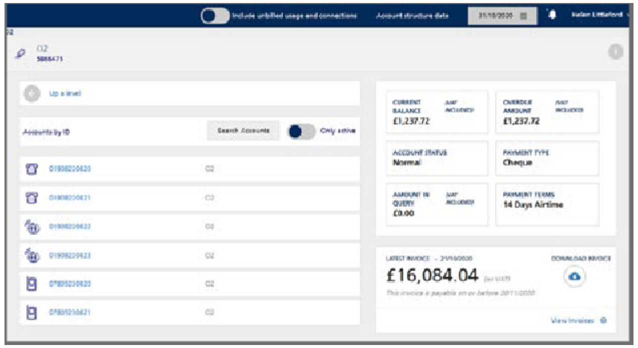
Tariffs and recent charges

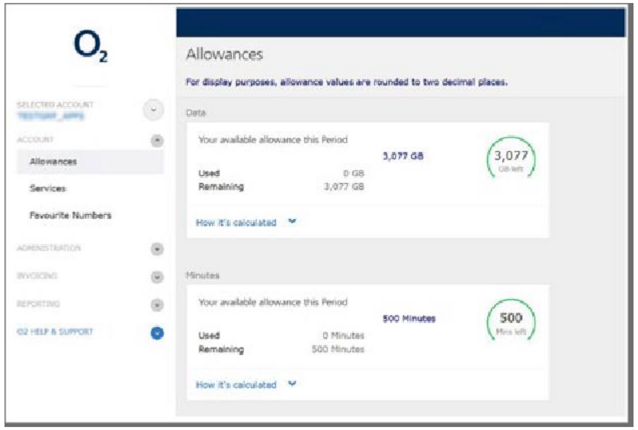
Key benefits

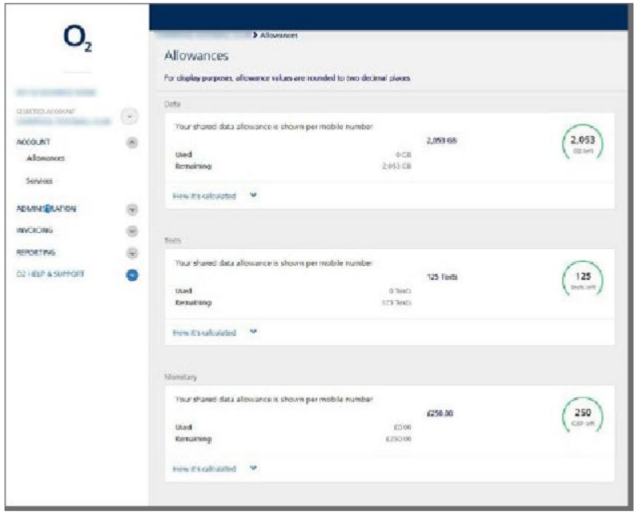
View tariff details, allowances and usage, services and discounts and recent charges for each number on the account.

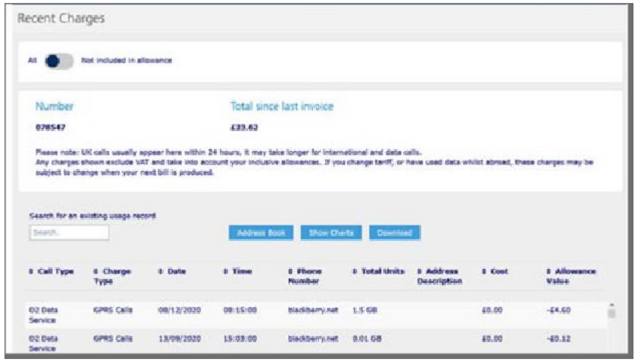
How to do it

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







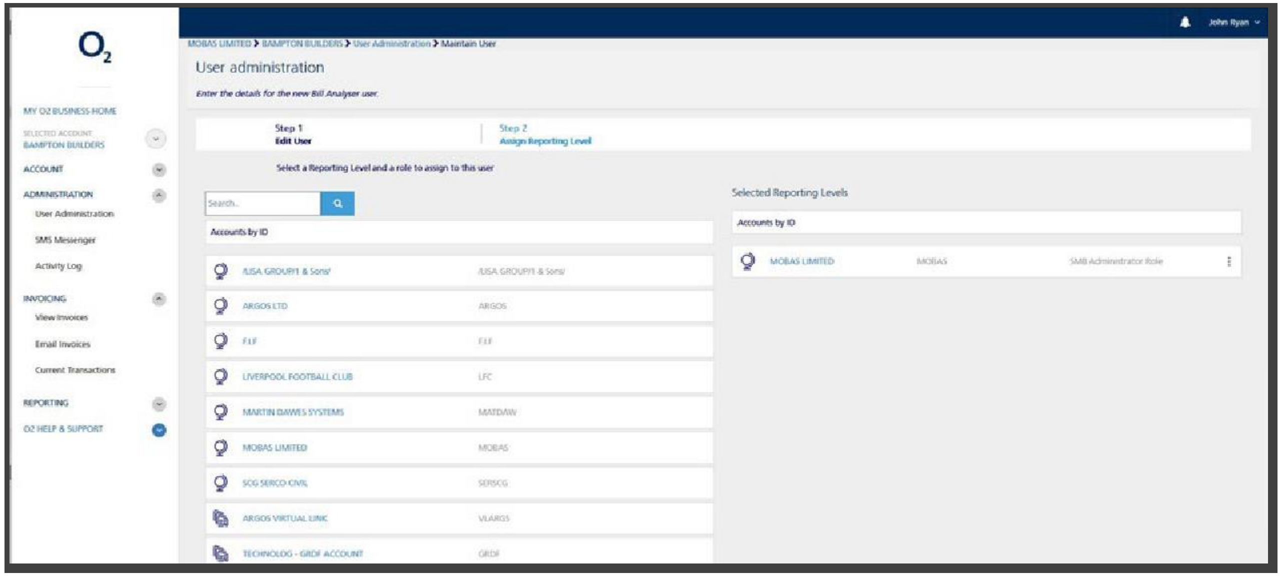


2.6 Account management

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



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; 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 recieve 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..

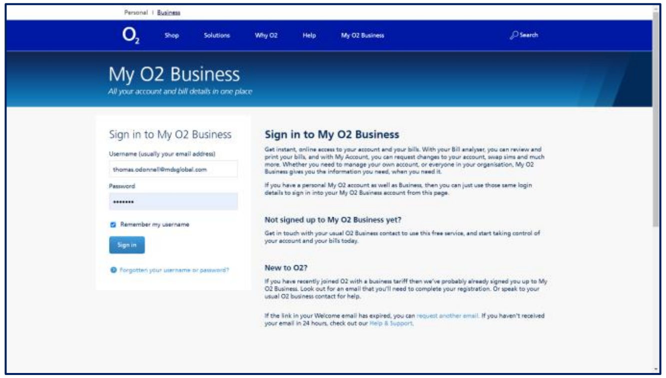
*Please note that the status of the **outgoing, stolen and full bars** will be visible, but to switch them on or off, you will need to speak to a customer services representative.

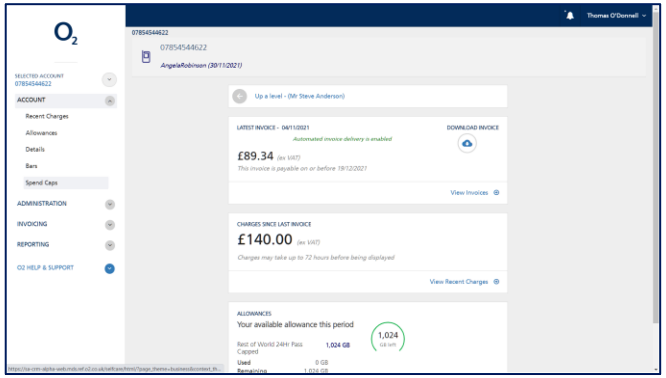
2.7 Account management

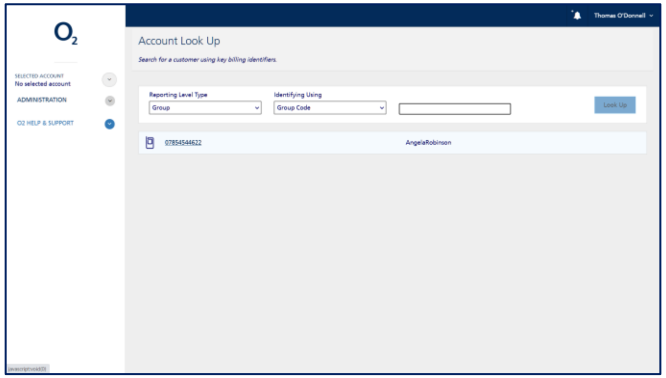
Spend Caps - View

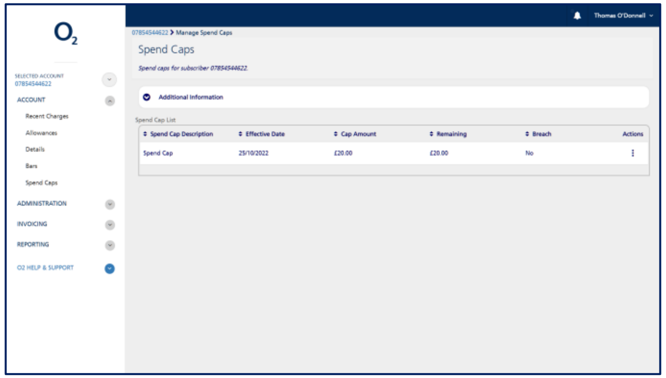
Key Benefits: You can now view, add and edit spend caps. This gives you more control on your spending.

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





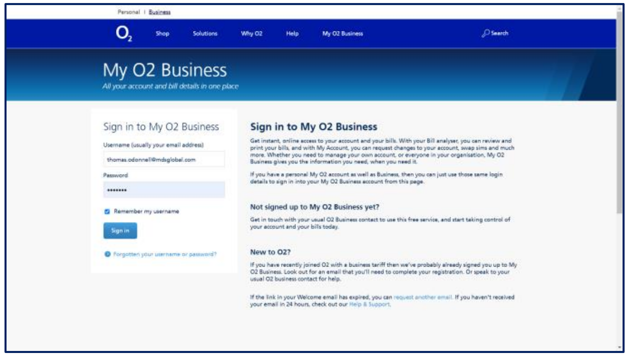


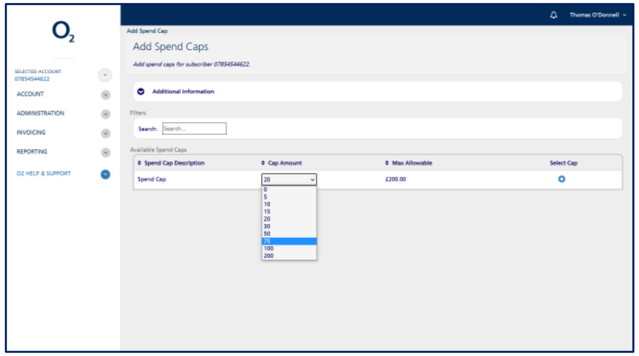


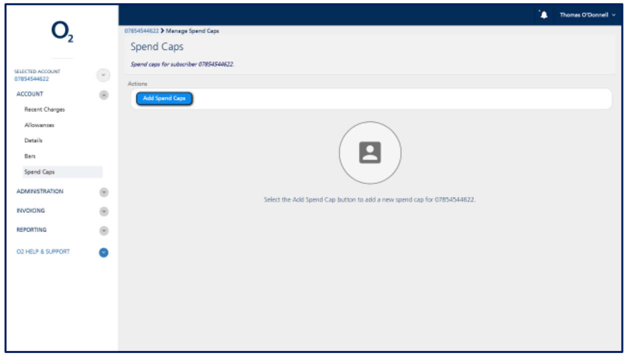
2.7 Account management

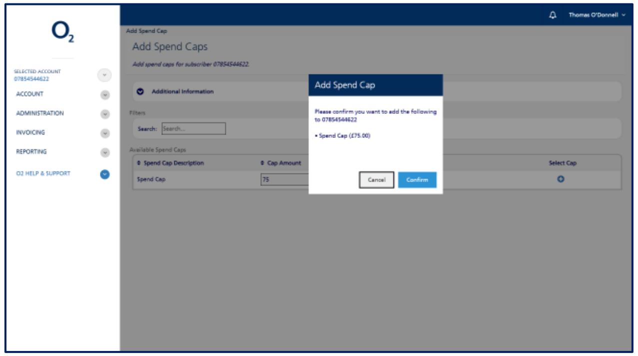
Spend Caps - Add

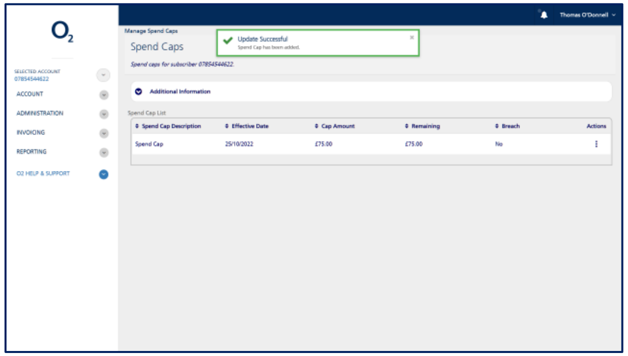
1. Log in and go to Bill Analyser
2. Search for mobile phone number
3. Select account and then select spend cap
4. Select add spend cap
5. Lists available spend cap
6. Change the value of the spend cap to your desired amount
7. Select the spend cap button and select confirm
8. You'll now see your update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

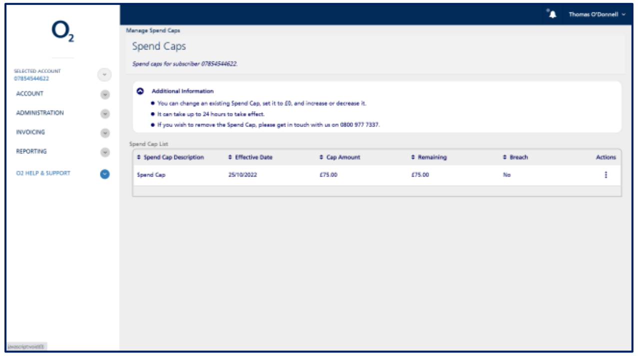








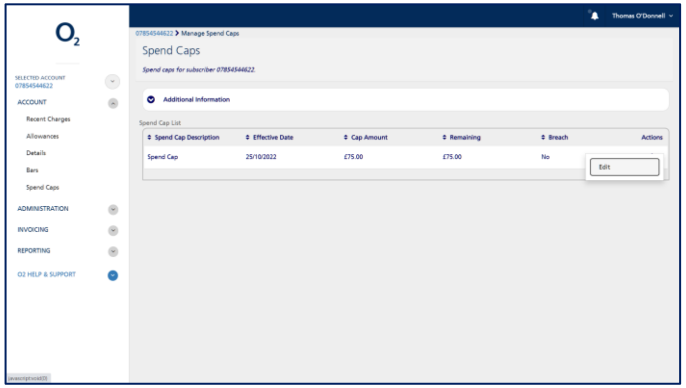


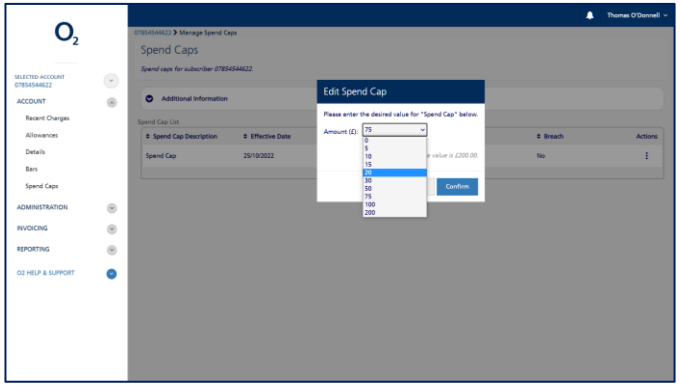


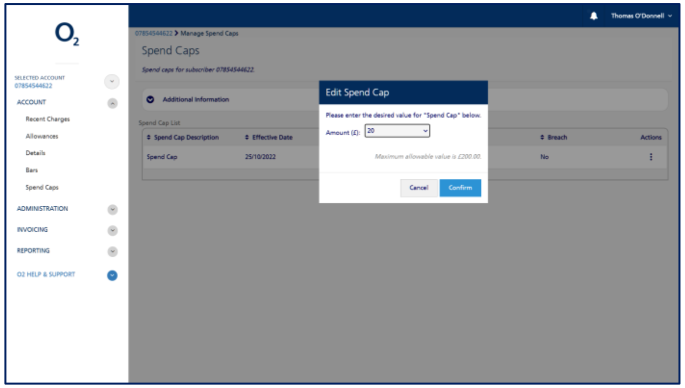
2.7 Account management

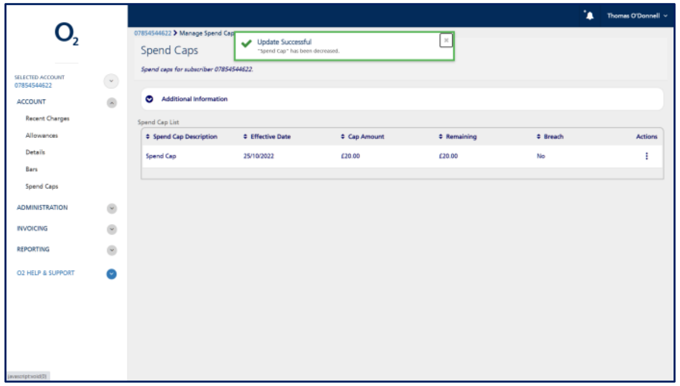
Spend Caps - Edit

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

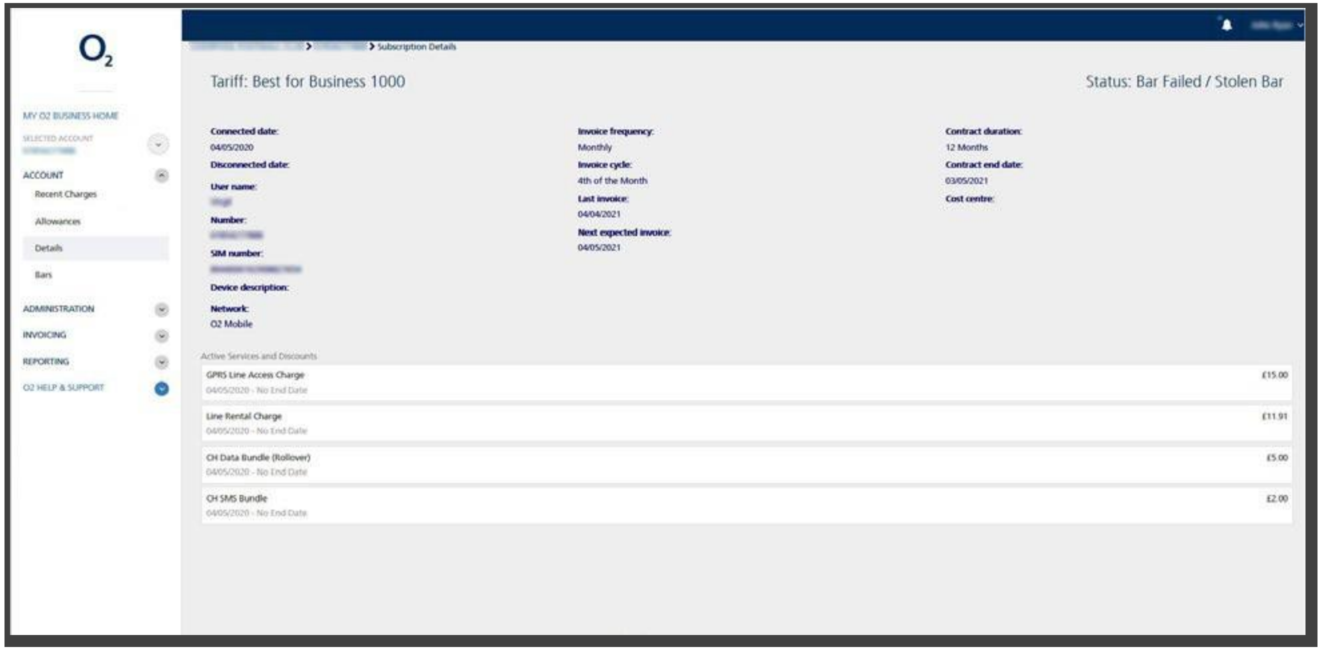
Details about your connections

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



2.9 Reports

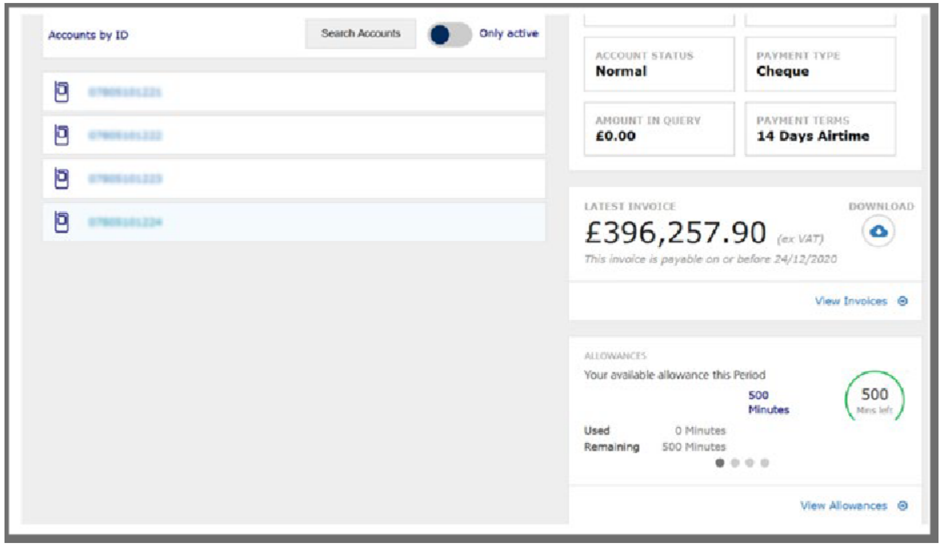
Dashboard

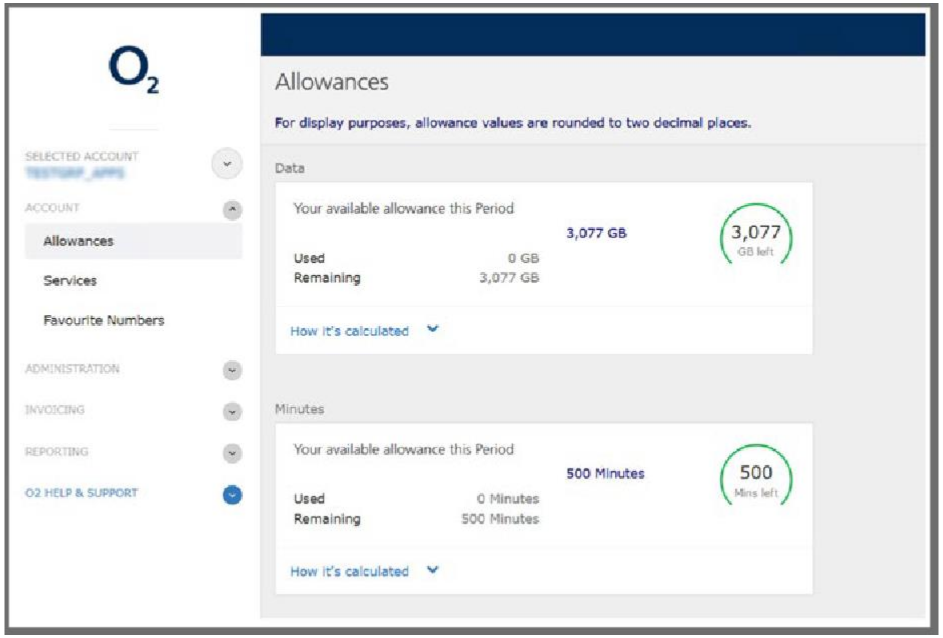
Key benefits

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

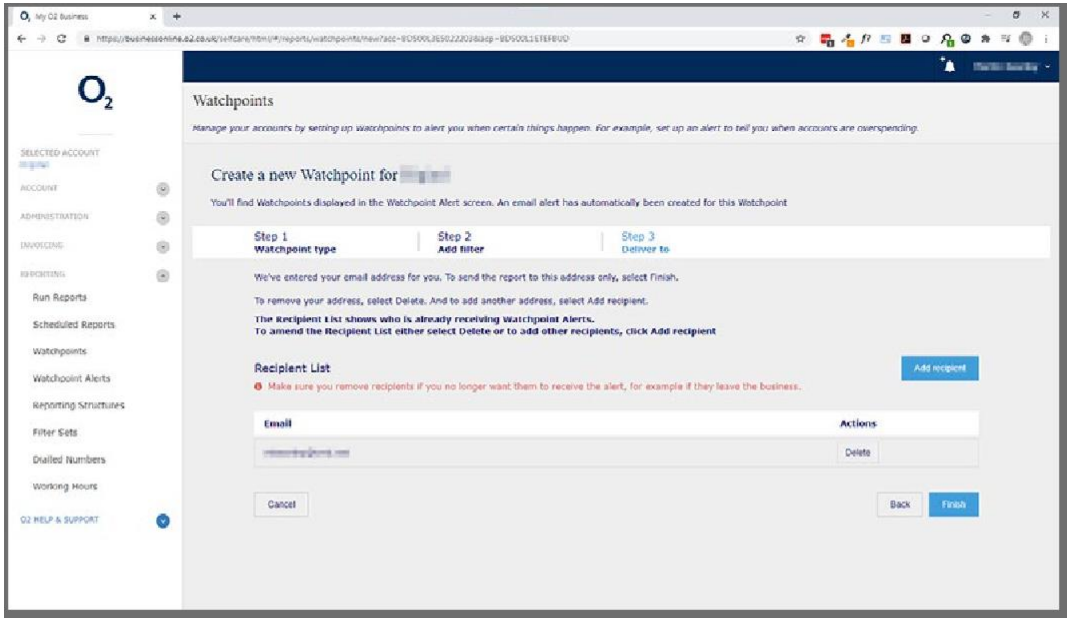
Key benefits

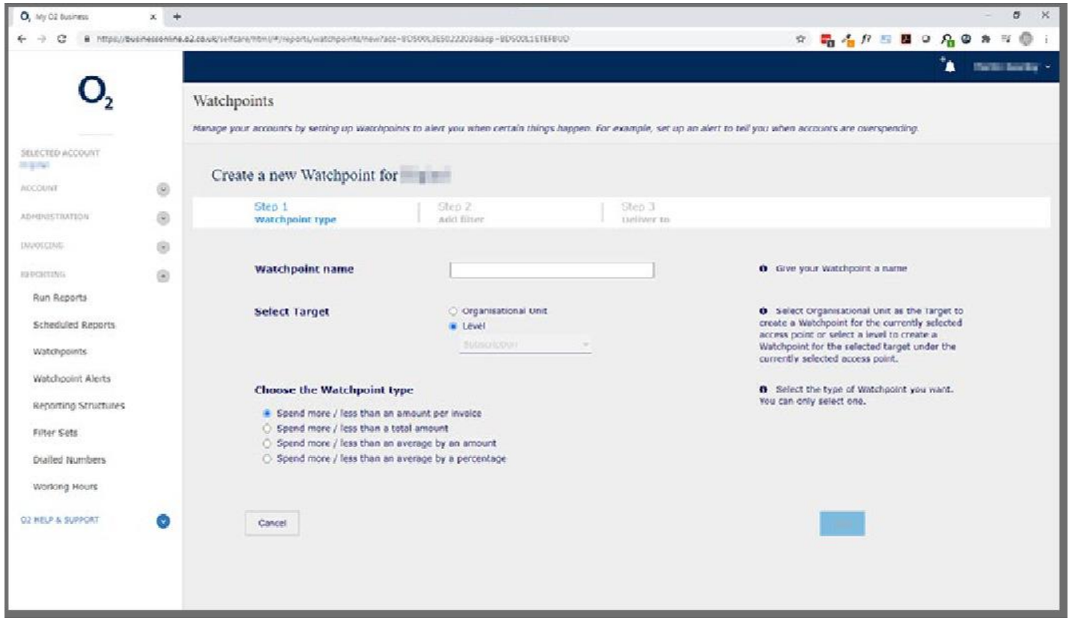
Allows you to set up alerts. For example, fixed-line or mobile accounts, or numbers that have spent above a certain amount.

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.

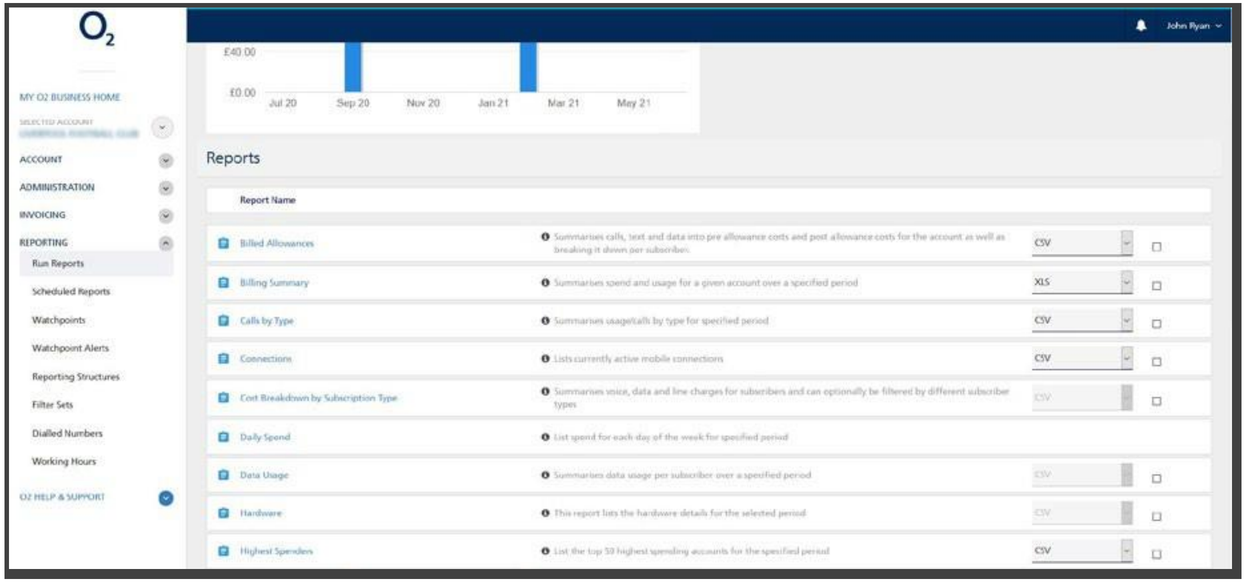
Scheduling a report

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.



1. After logging in and selecting Bill Analyser, choose the level of account desired from the accounts hierarchy list and click Reporting
2. Click Scheduled Reports
3. Click the Schedule a New Report button
4. Give the new scheduled report a name and fill in the other required parameters, for example how often the report should run
5. When you are happy with the details you have entered, click Next
6. 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
7. When you have selected all the reports you wish, click Next
8. You may have the option for adding additional filters on this screen, enter if applicable and click Next
9. 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
10. 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
11. Click Finish to create the Scheduled Report
12. 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
13. Here you can copy, edit and delete the details of the scheduled report

2.13 Reports

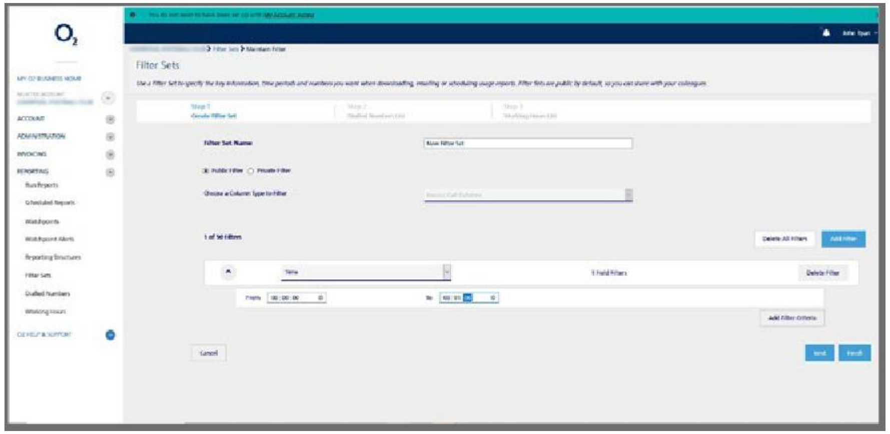
Filter sets

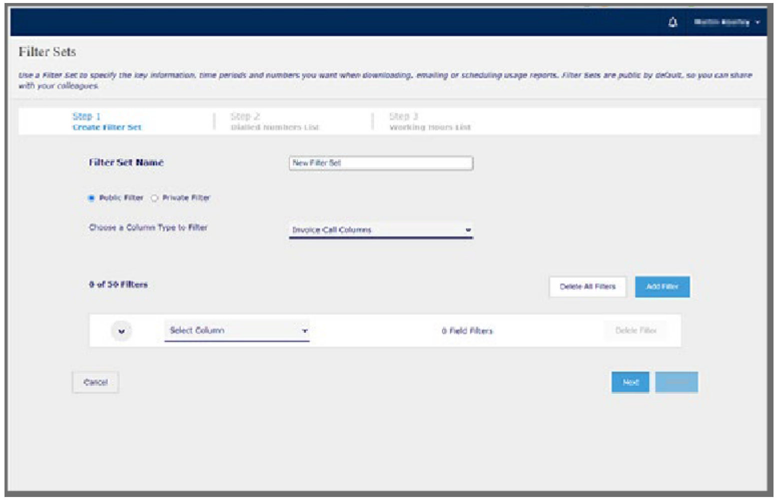
Use filter sets to filter usage reports to look at specific call types, dates, destinations, costs, numbers dialled and more.

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

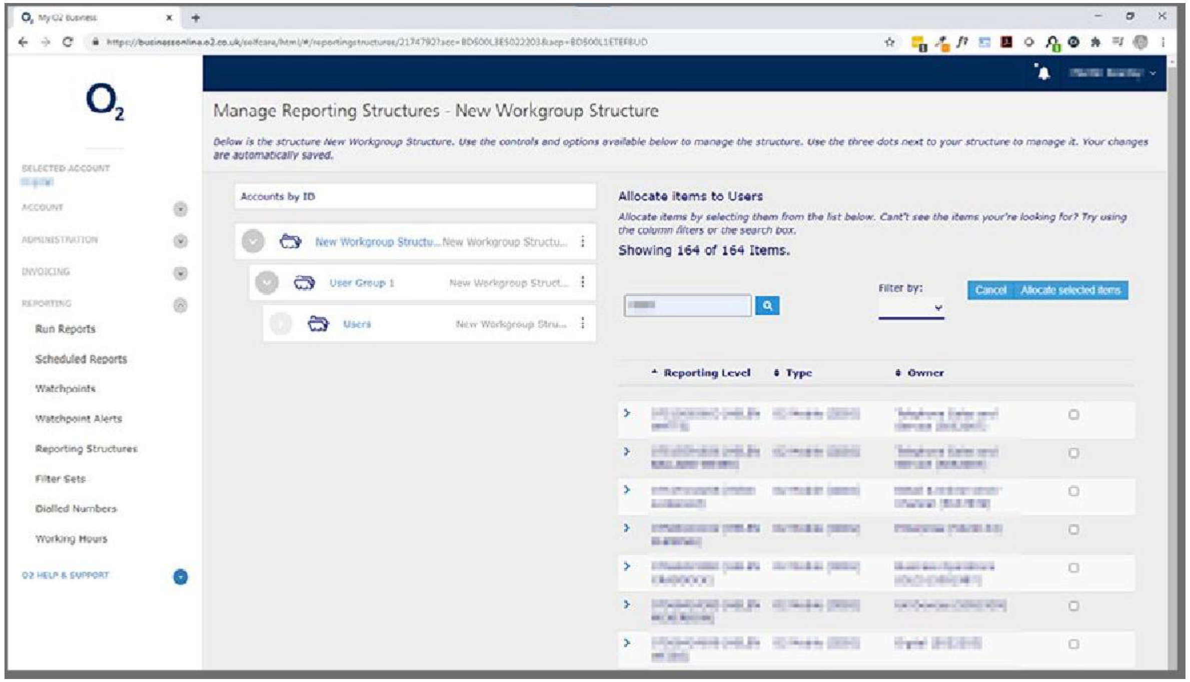
Reporting structures

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

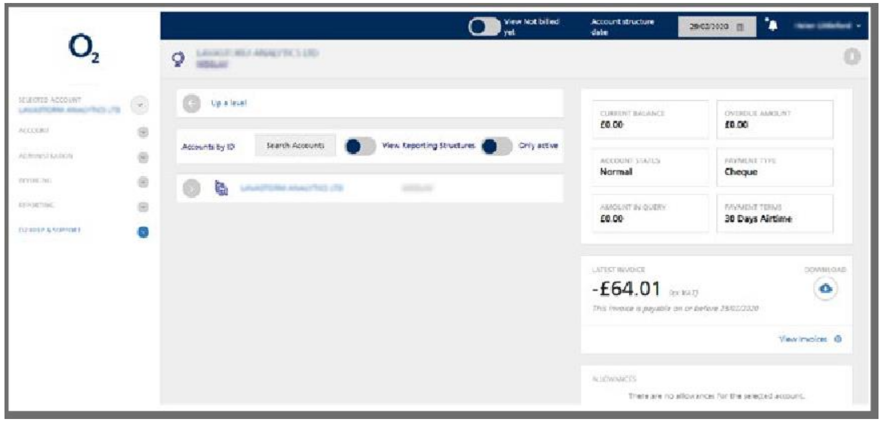
2.15 Invoices

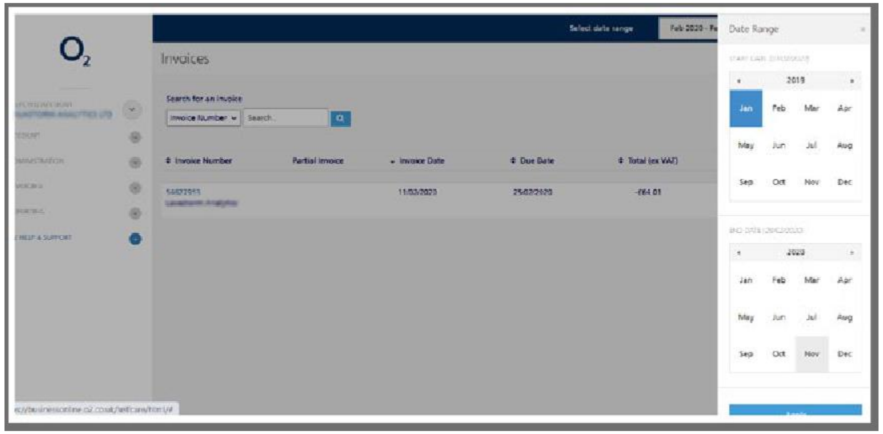
All invoices and current transactions

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

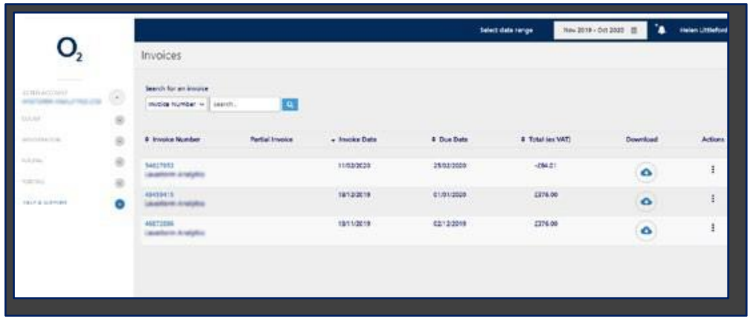
1. After logging in and selecting Bill Analyser, choose the level of account desired from the accounts hierarchy list
2. Click View Invoices
3. Alternatively you can click Invoicing then View Invoices
4. The invoice details will be displayed. To view the invoice of an account, click the desired invoice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

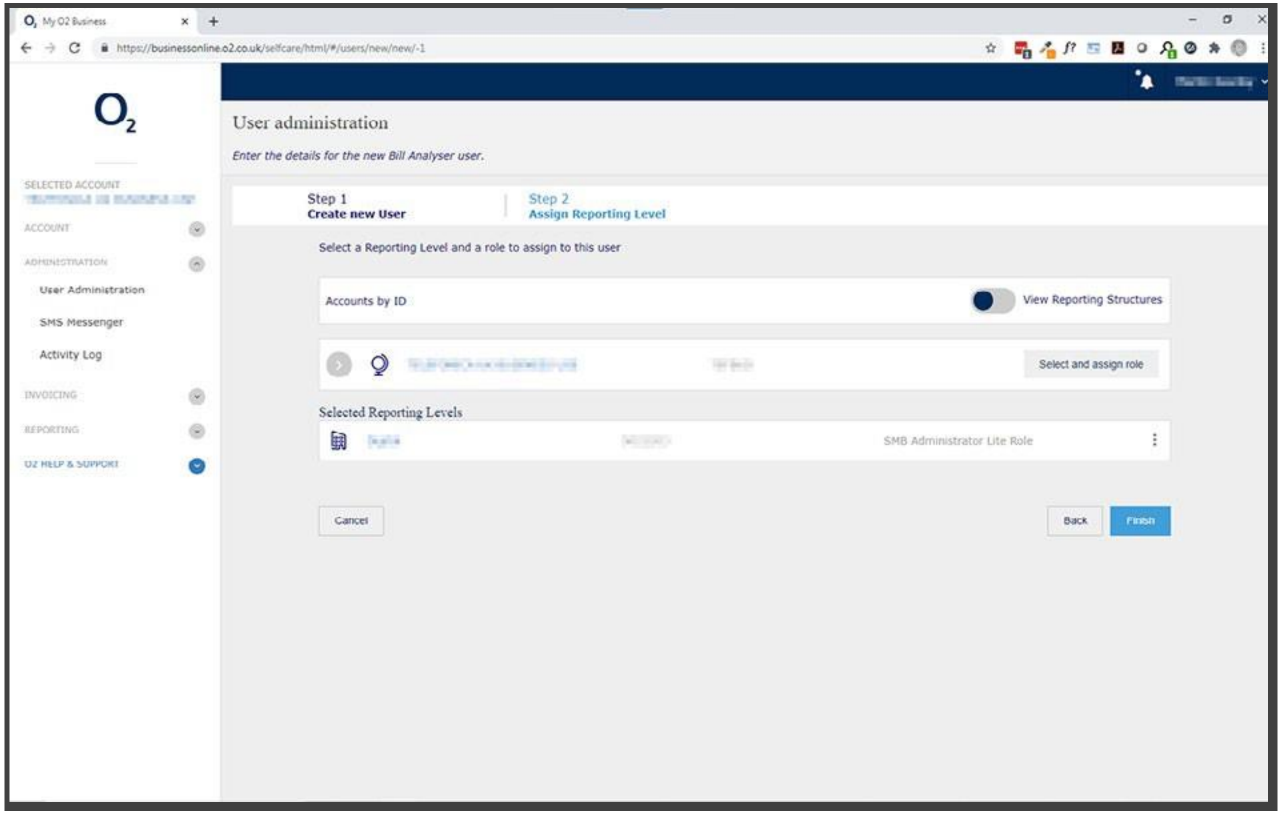
Create new users, manage access and look at their activity.

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

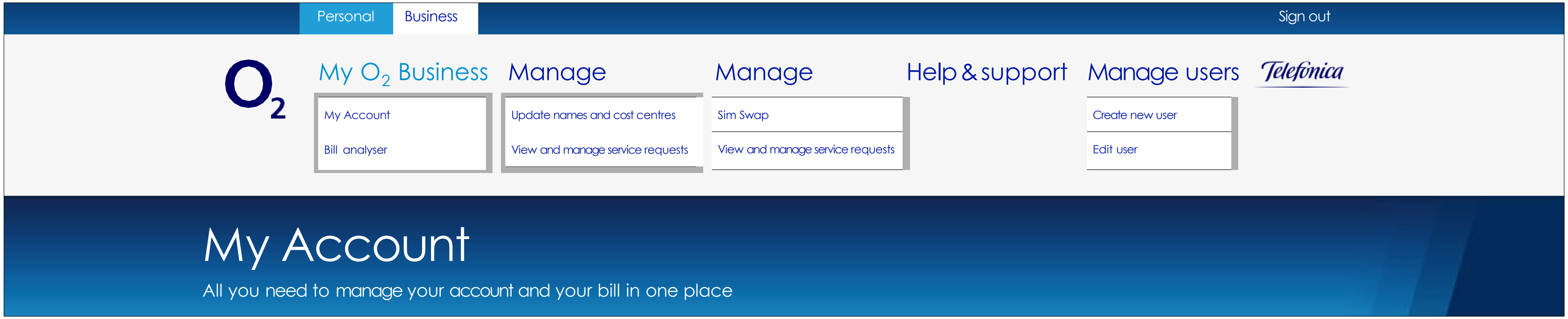
Edit a new user

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.



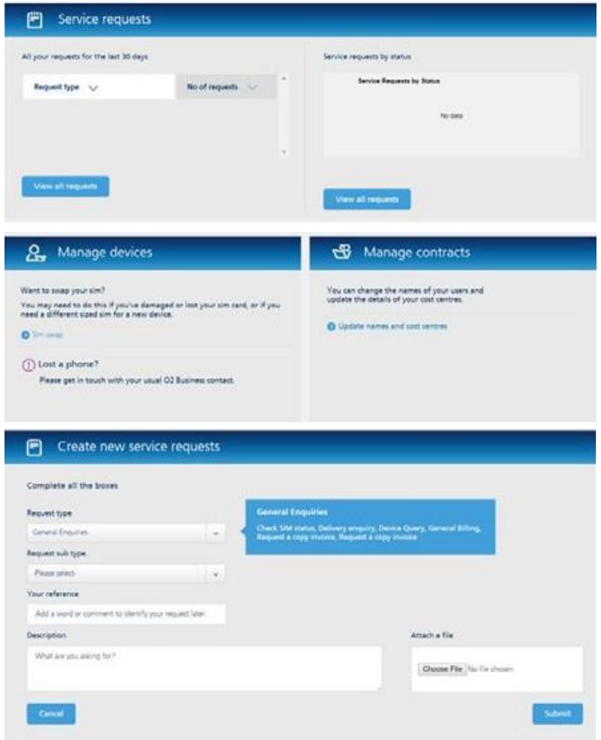
Here are your quick access links found within My Account. See to the right for a zoomed in view.

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.

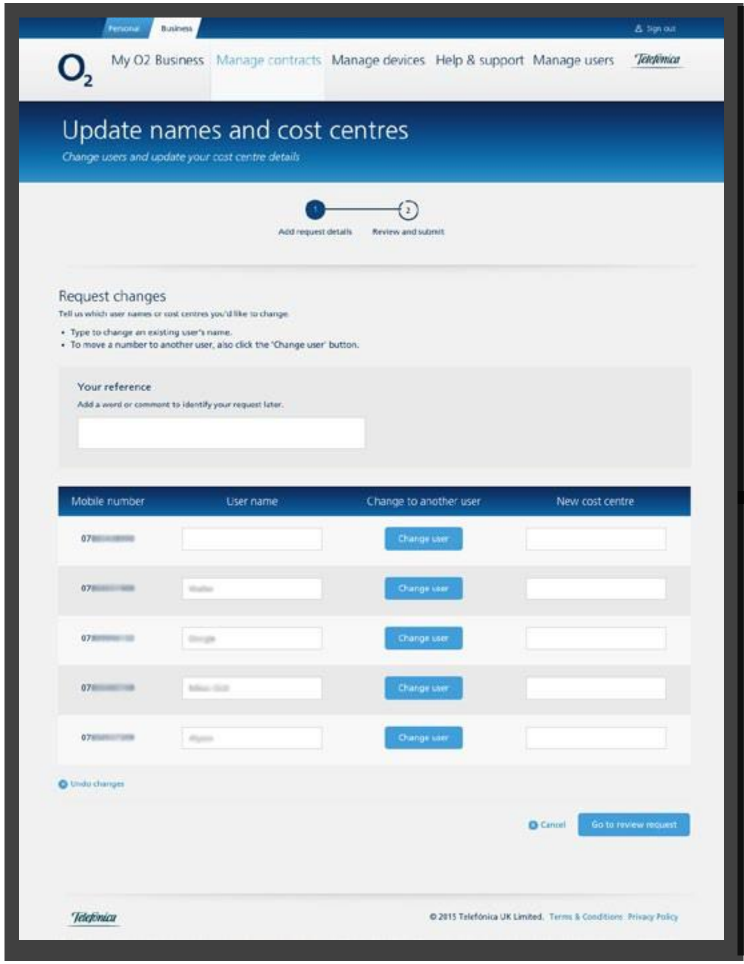
Assign an existing mobile number to a new or different employee instantly – great if you need to print their business cards quickly, and very useful if your business has high turnover of staff.

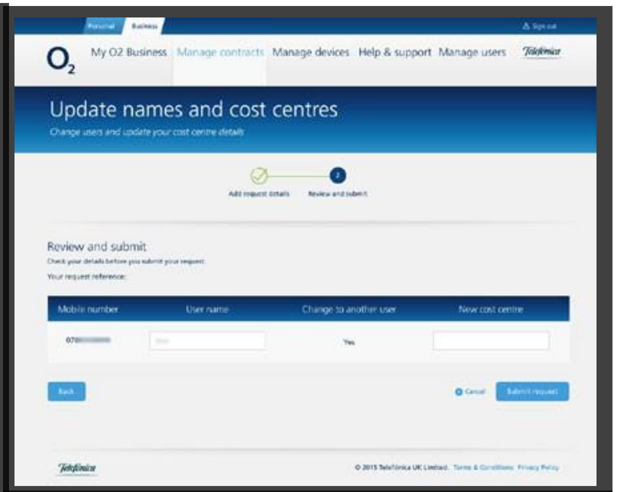
Set up and swap numbers between cost centres, especially useful if allocating budgets to different cost centres.

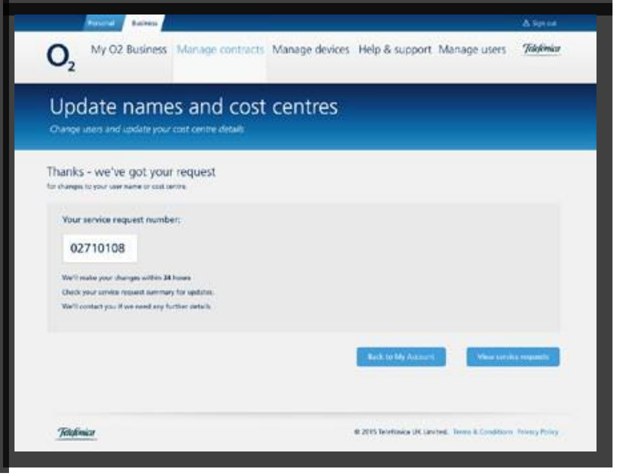
Facility to add a reference name, number or description to aid easy identification when viewing previous or outstanding service requests.

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







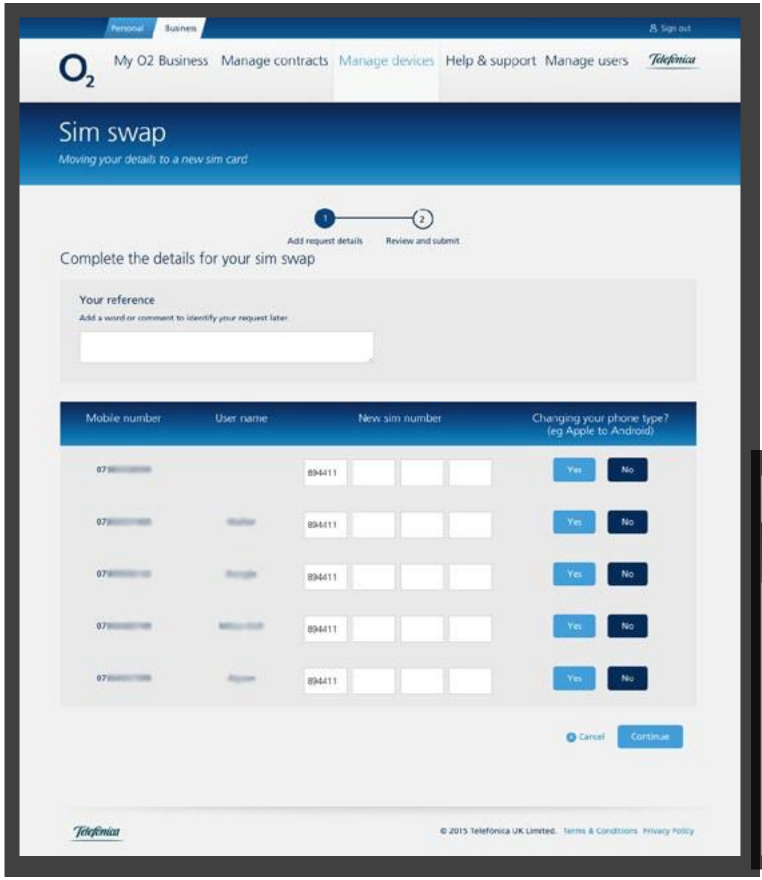
3.3 Manage devices

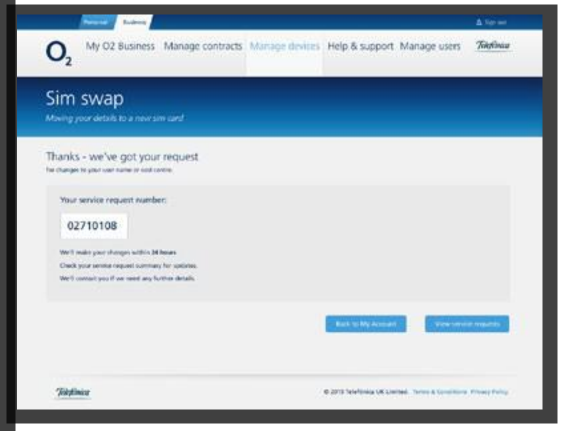
Sim swap

Key benefits

Upon receiving a new sim you have the ability to swap to the new sim efficiently without having to phone your usual ø 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:

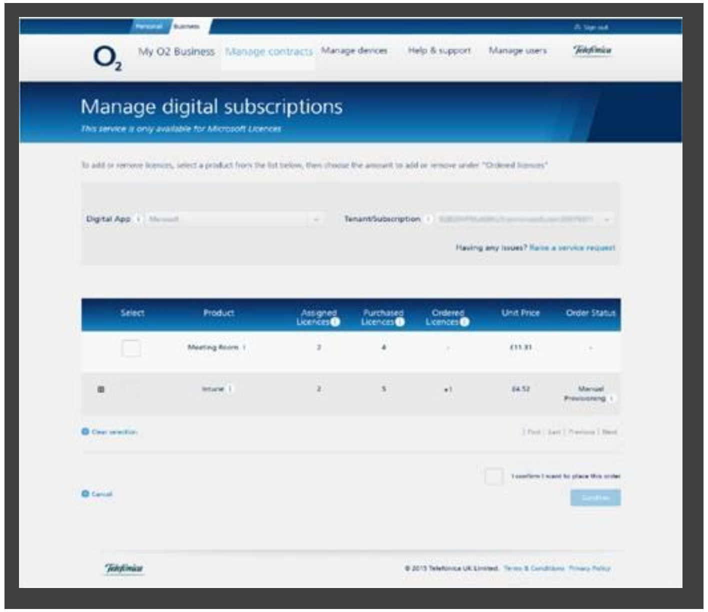
- Leave the existing 6 numbers in the first box and only fill in the other 3 boxes

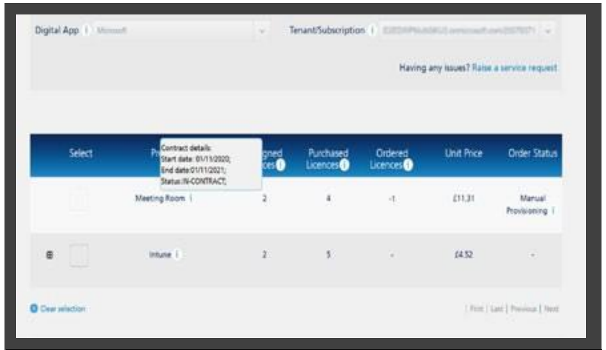
3.4 Manage your digital subscriptions

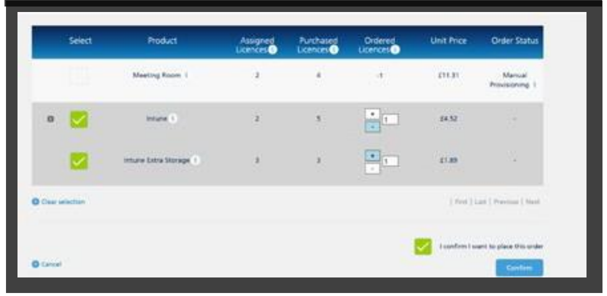
Available for Enterprise customers with digital subscriptions

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

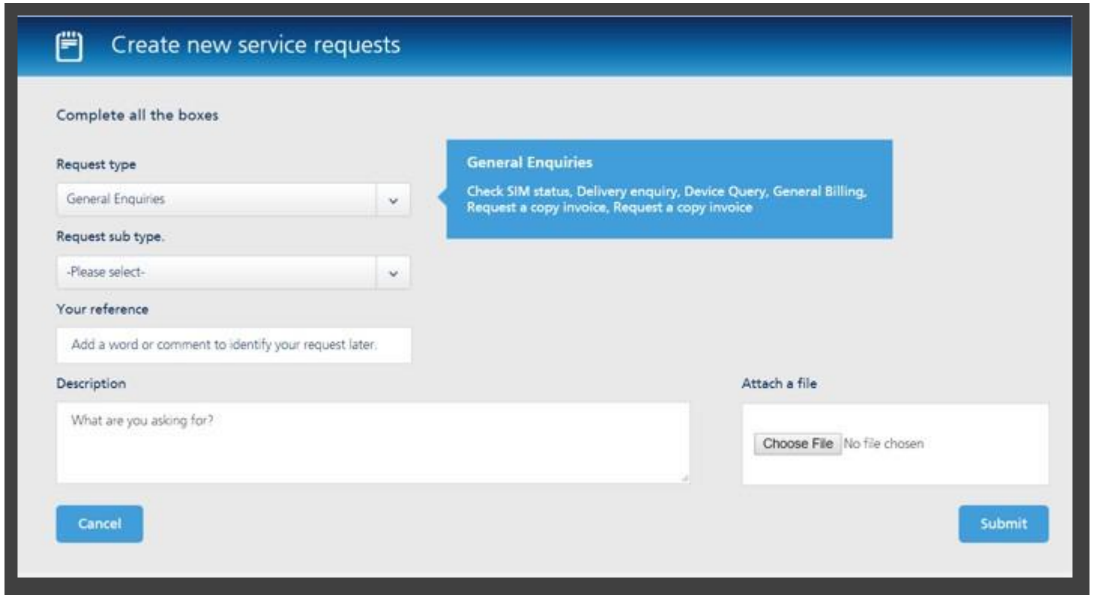
Create a service request to make changes to Bars and Bolt Ons, request PAC or PUK codes, place an order or make a general enquiry e.g. general billing.

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.

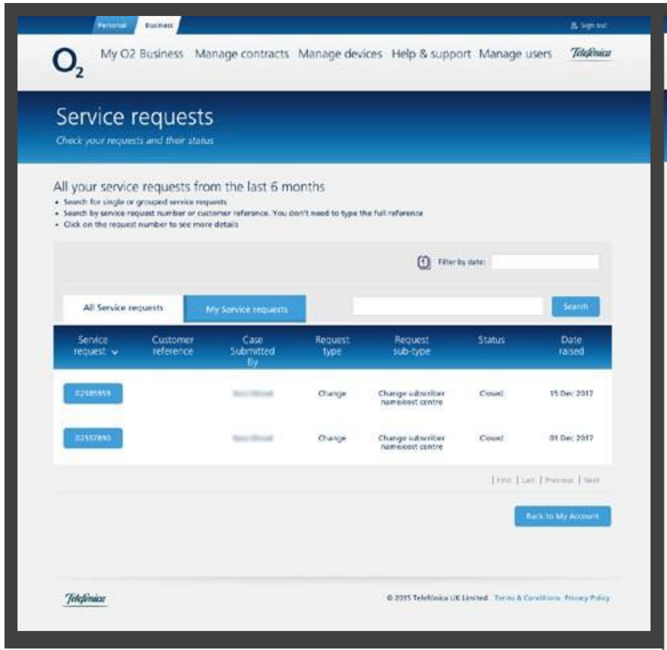
Search facility allows you to easily find a specific service request. Search for single or grouped service requests, by service request number or customer reference, you can also filter by date.

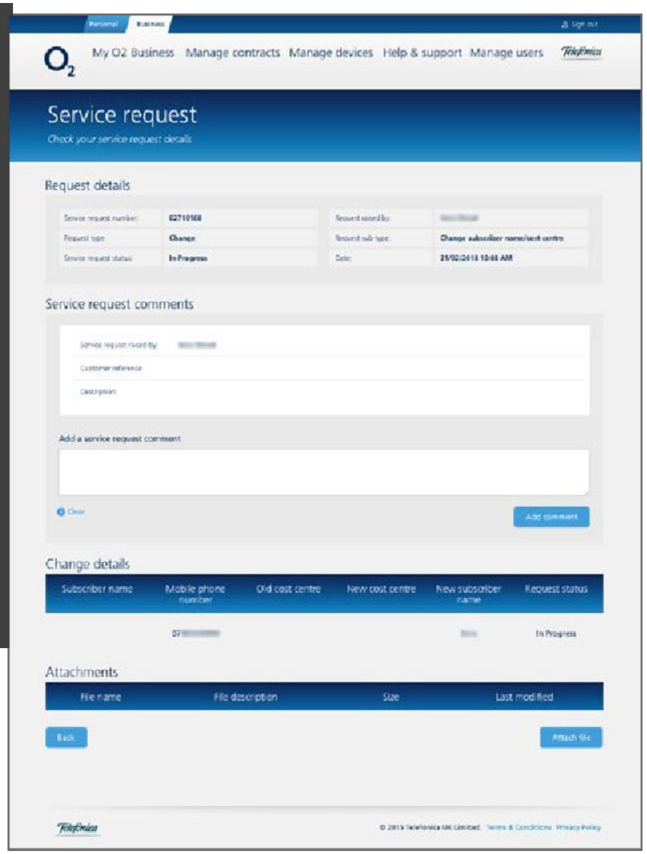
View a summary or the full service request details.

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





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

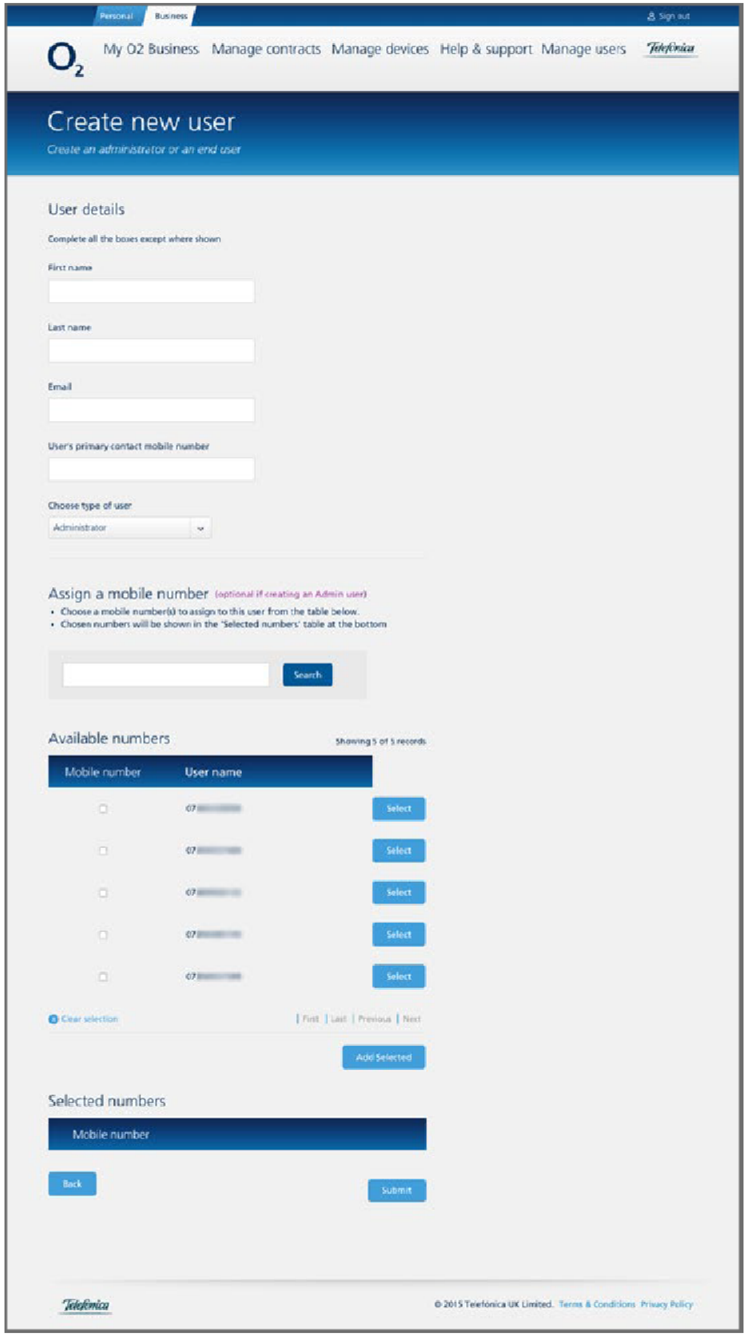
An administrator can: view and manage service requests, sim swap, update names and cost centres, create and edit users, create service requests.
An end user can: create service requests and view all service requests.

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 ø Business contact who can arrange the licence for you. Please note that if a user hasn't logged in to My ø 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.



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.

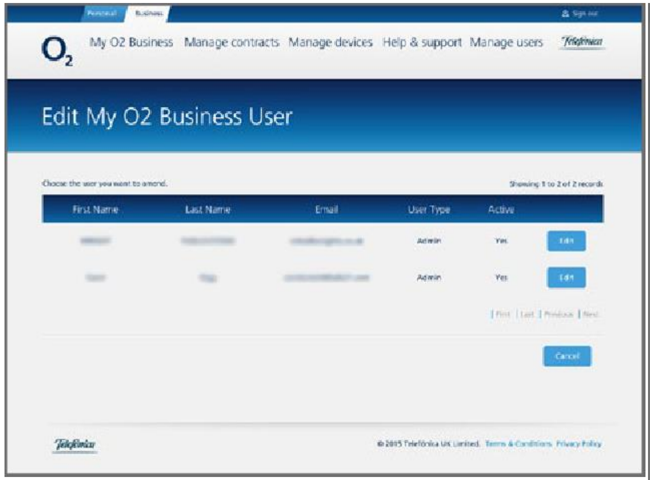
Types of user

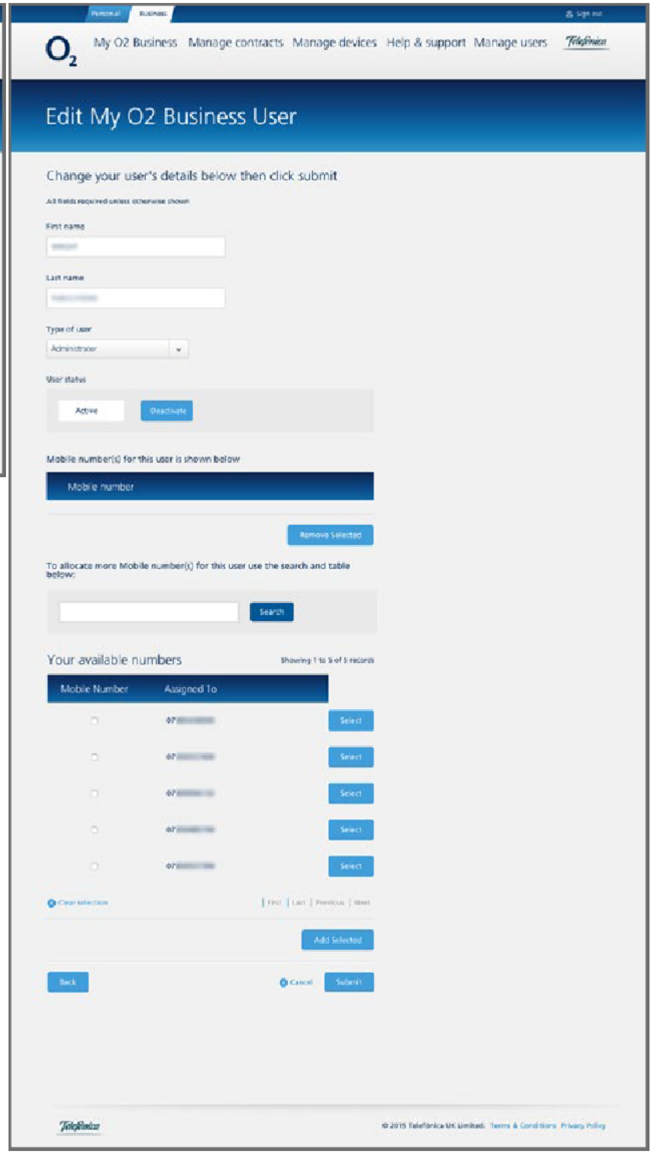
An administrator can: view and manage service requests, sim swap, update names and cost centres, create and edit users, create service requests.

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

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

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