



# Account Settings (Admin Only)



The following is a user guide for Account Settings - this is a reseller/admin only feature

Jim Business

ryan test

Account Settings

Account Info

GENERAL

Account Info

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Trunking

BILLING

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APPLICATIONS

Available Apps Alpha

Account Name & ID

The account name—a human friendly version of the account ID, as well as the unique account ID string.

Account Name

Account ID

Ryan Test

Account Realm

An auto-generated name that is typically not very human friendly. Most accounts will rename the first portion of the string using the company or department name to more easily distinguish among multiple accounts.

Account Realm

It's recommended that this be defined during the initial Account creation/setup process. It is not recommended you change it here, as it can potentially cause service disruptions.

Technical Contact

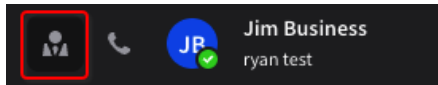
The contact person who should be the first line of support for this account.

Email

Phone Number

## Contents


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To access account settings click on the “guy in the suit” in top menu bar.

## Account Info

### Account Info

Account Name & ID	
The account name—a human friendly version of the account ID, as well as the unique account ID string.	
Account name	Account ID
<input type="text" value="long-account-name-2600hz"/>	<input type="text" value="f23379a68uaea8s878c77e"/>
Account Realm	
An auto-generated name that is typically not very human friendly. Most accounts will rename the first portion of the string using the company or department name to more easily distinguish among multiple accounts.	
Account realm	<div> It's recommended that this be defined during the initial Account creation/setup process. It is not recommended you change it here, as it can potentially cause service disruptions.</div>
<input type="text" value="2a0482.sip.sandbox.company.com"/>	
Technical Contact	
The contact person who should be the first line of support for this account.	
Email	Phone number
<input type="text" value="support@company.com"/>	<input type="text" value="+1 415 886 2600"/>

### Account Name

This is the name the account was originally created as. This is the “human friendly” version of the account.

### Account ID

This value is read-only and is what the system uses internally as a unique identifier . It can be referenced and copied into a support ticket for account debugging if necessary.

### Account Realm

The account realm is an important component for the internal workings of your system.

It is important this setting is defined and kept static once it is defined. By default, the realm is auto-generated by the Create Account Wizard. As it is an auto-generated name it is not typically a recognizable string of characters; most accounts will rename the first portion of the string using the company or department name to more easily distinguish among multiple accounts.

- ***NOTE: We recommend you define this during your Account Wizard setup process, and if you are white-labeling the solution set, it's best to have this already defined before you access these pages. It is not recommended you change it here, as it can cause service disruptions.***

### **Technical Contact**

Enter the contact person who should be the first line of support for your account. This may already be included as part of your original installation.

### **Formatting**

## Formatting

### Timezone

The default timezone configuration for this account.

Los Angeles (America)



### Phone Numbers

How phone numbers are formatted and rendered throughout this account.



#### International



Display all numbers according to their international standard. You can add format exceptions for specific countries if you wish to display those numbers in their national format.



#### National



Display numbers in their national format. For example, a US number would be formatted as (415) 886-2600.

## Timezone

This is where the default Timezone for the system is defined.

### • Notes

- The User Interface timezone displayed within the comm.land to end users can be overwritten by each user and customized to reflect a local timezone if it is different from the company's home account timezone.
- The Timezone setting defines a "home default" time zone that will be used to stamp incoming calls, track office hours and holiday settings, and help direct callflow variables as needed.

## Phone Numbers Format


This setting identifies the format you want to see phone numbers in. By default, all phone numbers are displayed in their international standard (+1 415 222 1234 for a US

number for instance), but you can also choose to display numbers in their national format (e.g. 415 888-2222 for a US number).

Finally you can choose to display all numbers in their international format, and then select countries that you wish to display in their national formats. This would mean for example, a US number could display without the country code, and all other international numbers would keep their country codes.

National mode will show only the local format. If you anticipate international calls this is not recommended.

How phone numbers are formatted and rendered throughout this account.

**International**☒


Display all numbers according to their international standard. You can add format exceptions for specific countries if you wish to display those numbers in their national format.

Format exceptions

United States x

1 item selected

Phone numbers for selected countries will render in their national format.


**National**☐

Display numbers in their national format. For example, a US number would be formatted as (415) 886-2600.

## Caller ID Privacy

## Caller ID Privacy

Define how you want outgoing calls from this account to be identified in Caller ID.

 Caller privacy settings only affect calls placed to numbers outside of your organization.

Hide Nothing ☒

Hide Name Only ☐

Hide Number Only ☐

Hide Name & Number  ☐

## Caller-ID Privacy

This setting defines how you want your outgoing calls to be identified in Caller ID.

- ***NOTE: If you select “Hide name and Number” your calls may be rejected by a receiving PBX or caller filtration software system.***

## Trunking

Trunking

**Inbound (0)**

The number of Inbound trunks defines how many inbound calls your account can receive simultaneously.

- +

**i** 0 Inbound trunks will allow your account to handle 0 simultaneous incoming calls.

**Outbound (0)**

The number of Outbound trunks defines how many outbound calls can be made from your account simultaneously.

- +

**i** 0 Outbound trunks will allow your account to handle 0 simultaneous outbound calls.

**Two-Way (1)**

The number of Two-way trunks defines how many simultaneous calls your account can handle at one time.

- +

**i** 1 Two-way trunks will allow your account to handle 1 simultaneous calls (any combination of inbound + outbound).

A trunk is akin to a physical phone line. Only one call can be active for each trunk.

### **Inbound and Outbound**

Inbound Trunks can only handle calls inbound from a carrier, Outbound Trunks can only handle calls outbound to a carrier

### **Two-way Trunks**

Two-way trunks provides added flexibility; they can be dynamically assigned as inbound or outbound. The value entered is the total amount of trunks available, for example a value of 5 could assigned at any time as 4 inbound and 1 outbound, or 2 inbound and 3 outbound.



# Payment Details

## Payment Details

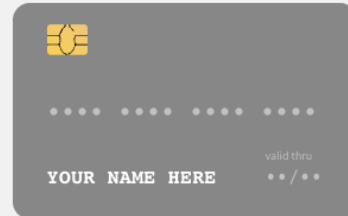
### Card on File

Name on Card

Card Number

Expiry Date ?

Security Code



### Billing Contact

Full Name \*

Email \*

Phone Number \*

### Billing Address

Primary Service Address \*

Address Line 2

City \*

State/Province/Region \*

Country \*

ZIP/Postal Code \*

## Credit Card on File

You MUST enter a credit card and maintain a balance for your main account.

Once this is entered, it will be used to:

- Purchase new numbers
- Add credit under the Usage Charges screen for discrete charges including

- Monthly charges
- Added billing for some applications
- Added billing for SMS/MMS texts, depending on your service plan
- Manual override charges for call restrictions as defined in the Accounts setup.

## Billing Contact

Enter contact information for billing questions. This is used if there is someone specific that we need to speak with regarding billing.

## Usage Charges

Usage Charges + Credit

\$100.00  
Available Credit

312242  
Bytes Used

992  
Minutes Used

\$213.21  
Call Charges

Ledgers

Threshold Alerts **Off**

Auto Recharge **Off**

Subscriptions

Per Minute

Search

Last 30 days

Adjustments

Automatic Speech Recognition (ASR)

Generic

Mobile Data

Payments

**Per Minute**

Prorations

Recurring

Rollovers

	From	To	Account	Minutes	Amount
	10 238 8934	+1 310 324 9874	Some Child Account	6	-\$0.0354
	10 238 8934	+1 310 324 9874	Some Child Account	6	-\$0.0354
	10 287 1723	+1 415 344 0023	Some Child Account	16	-\$10.0354
	10 287 1723	+1 415 344 0023	Some Child Account	16	-\$10.0354
	25 734 0091	+1 210 483 2139	Some Child Account	8	-\$8.9873
	25 734 0091	+1 210 483 2139	Some Child Account	8	-\$8.9873
	10 287 1723	+1 415 987 1243	Some Child Account	31	-\$5.2764

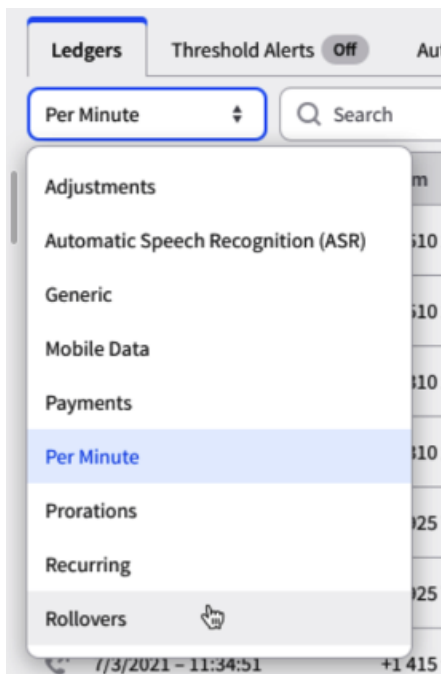
## Usage Charges

This is where you can monitor your account usage, manage credits, enable threshold alerts, enable Auto Recharge, and if a Reseller, manage subscription payment.



### **Only the top level account needs to have credit card information associated to it.**

- When an account is first created and set up. A service plan will be added. Billing starts at that date (proration). When the customer enters their card, there will be a charge then. They will also then be at the beginning of each month.
- The credit card is charged at billing cycles. When an account is first set up, after the service plan has been added, the account will be charged for the remainder of the month (proration).
- Under the Usage Charges / Subscriptions tab you can set when and how you want to set up payments for your monthly bill -- as an automatic billing via this charge card, charged against your account credit, or by manually going to check your balances. The latter, called "Self Manage" is set as the default.



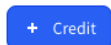
## Ledgers Tab

Via the dropdown see the various ledgers tied to your account, this list is dynamic based on your contract and services. Filter, search, download your various ledgers.

Common Ledgers and what they do, please reach out to your sales rep if you have any further questions.

- *Per Minute*: This displays the per minute charges incurred based on your settings in SmartPBX for call charges.
- *Rollovers*: This reflects any credits or balances carried forward from the previous month. The value is calculated after monthly charges are applied.
- *Mobile Data*: If you have enabled SMS text messaging and/or mobile phone devices to your account, this tab will display the data (in Megabytes) that you've used for the month.

## Add Credits



When you select Add Credits you will see a new dialog box, allowing manual addition of credit.

Adding Credit

Available Balance

\$39.24

Adding credits manually allows you to immediately increase your current balance. maintaining a current balance is very important, as it is necessary for international or per-minute calls, e911, caller ID, and other system features that incur a charge.

\$0

Cancel

Add credit

It is critical you maintain a positive credit balance as there are functions that require accessing this in order to work.

This includes:

- Per-minute, inbound toll-free or international calls when using trunks or not.
  - If no credit is available *and* they have no trunks, calls will fail.
  - Only toll-free outbound would work.
  - Depending on the amount of trunks and call volume it can fairly quick to spot or it can take days to realize this.
- When using trunks, if toll-free international per-minute calls, and inbound toll-free.

Ledgers

Threshold Alerts 

On

Auto Recharge 

Off

Threshold Alerts help you prevent shut off of services to your account recommended to have Threshold Alerts turned on for your account.

Threshold Alerts

Notify when balance falls below:

\$20

## Threshold Alerts

This sets a minimum account balance threshold.

When the Current Balance falls below this, you will receive an email alert.

Set this value based on how many customers you have and how many calls you anticipate will be billed per month. A common setting to start is \$20-25.00.

Account Settings (Admin Only)

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## Auto Recharge

Set this to ensure that your calls are not canceled due to a run-out balance. Enter the threshold amount and the amount of credit you want to add.

- ***NOTE: It is important to set the recharge amount so it will cover at least a day, as the charge event occurs once a day only and it would require a manual update.***

Ledgers

Threshold Alerts On

Auto Recharge On

Auto Recharge enables you to set up a threshold to automatically add credit, and determines how much will be refilled each time. Auto Recharge also will notify you via email when an account is recharged.

Auto Recharge ☒

When credit balance falls below this amount

\$50


Recharge this account with this amount

\$100

**i** In order to prevent fraud, Auto Recharge will only run once per day. If the low balance threshold hits for the second time in one day and Auto Recharge has already occurred, an Account Admin will need to add more credit manually. An email notification will also be sent.

## Service Plan

## Service Plan



\$10,099.00 Amount Due		10/31/2022 Due By		
<input type="text" value="Search"/>				
Service	Rate	Quantity	Discount	Monthly Charges
account_apps/provisioner	\$99.00	1	-	\$99.00
account_apps/cluster-manager	\$99.00	1	-	\$99.00
account_apps/some.app	\$999.99	1	-	\$999.99
account_apps/another.app	\$2,600.00	1	-	\$2,600.00
account_installation	\$6,301.01	1	-	\$6,301.01

## Service Plan

This displays a breakdown of the Account's service plan and amount due at the end of each month. The download button allows you to download the data into a .csv file.

## Transactions

## Transactions

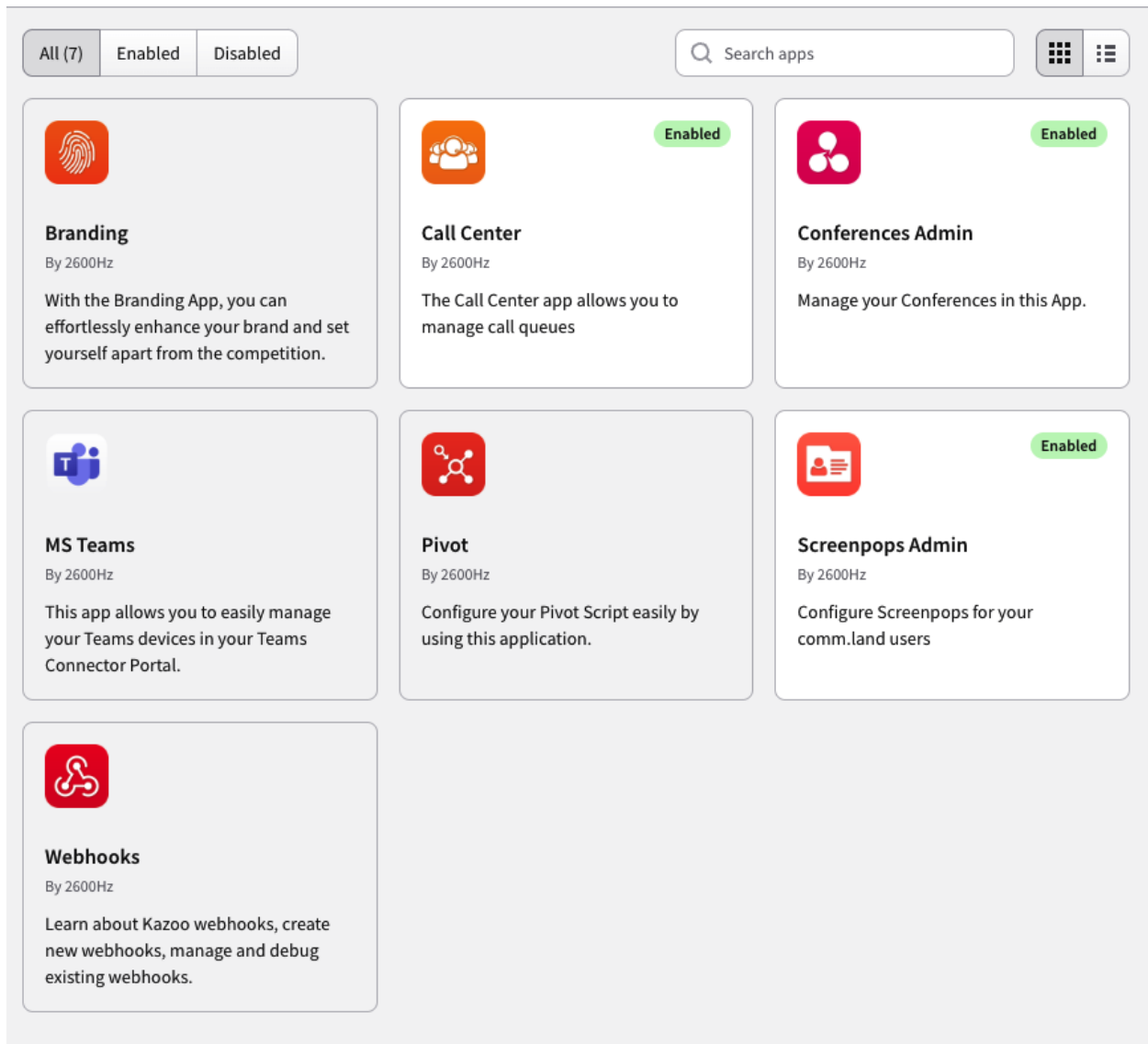
<div>\$5,151.00 Total</div>		
<div><div><input type="text" value="Search amount"/></div><div>07/01/2023 - 07/31/2023  </div></div>		
Date/Time	Description	Amount
13/07/2023 - 09:17:16 AM	Manual top-up	\$1,001.00
13/07/2023 - 09:17:08 AM	Manual top-up	\$1,000.00
13/07/2023 - 09:16:58 AM	Manual top-up	\$1,000.00
13/07/2023 - 09:16:48 AM	Manual top-up	\$100.00
13/07/2023 - 09:16:30 AM	Manual top-up	\$2,000.00
05/07/2023 - 12:51:44 PM	Manual top-up	\$50.00

## Transactions

The transaction summary lists the charges that have been made to the card listed. This can be filtered by date and downloaded to .csv file

## App Selector





Enable/Disable and set permissions on your comm.land apps



## Conferences Admin

By 2600Hz

Status

Enabled



Overview

Permissions

### Description


Manage your Conferences in this App.

The Conferences app provides an intuitive experience for conferencing activities. This is perfect for users managing one or multiple conferences in unison. Initiate and end conferences on demand, see all activity for live participants.

### Features

- View real-time activity of participants and moderators
- Lock, mute and end live conferences
- Setup new conferences, assign admins.

Upon clicking the app, get more details about the app. Enable or disable



Conferences Admin


By 2600Hz

Status

Enabled ☒

Overview


Permissions



All Users (7)

Grant access to this app for ALL users on this account.



☐




Admins Only (2)

Grant access only to account admins.

☒

Name	Role
 Jim Business	<div>Admin</div>
 John Doe	<div>Admin</div>



Specific Users

Grant access to specific users on this account.

☐

In the permissions tab you can grant permission to All Users, Admins Only, or a certain subset of users you want to have access.