

STEP GUIDE - ADDING A CUSTOMER ACCOUNT

Adding a customer account is done within the Account Manager application.

Once you have logged in, follow these steps:

1. The Accounts Manager app shown below is the default when you log in until you identify a "default app". If you do not land here upon logging in, you can click on the Apps icon identified here by the red circle and select it from the available icons.

KAZOO	Accounts Manager	Ē		Melissa Demo 🛭 🙀	•
Q Search					
Add New Account	You can edit a sub-account by selecting it from the lis	t on	the	e left	
- - - -	Or Create a new sub-account by clicking on the "Add New Ac	τοι	int"	button.	

2. Once in the app, click Add New Account.

KAZOO	😬 Accounts Manager	Ē=			۲
Q Search					
Add New Account	You can edit a sub-account by selecting it from the lis	st or	1 the	e left	
	Or				
	Create a new sub-account by clicking on the "Add New Ad	ετοι	unt"	' button.	

3. The following screen will appear.



KAZOO 🔤	Accounts Manager	,		Ē	 Melissa Demo	o;	•
	~	C	\$				
	Set up an account	Call Restrictions	Permissions				
	Account Name						
	Account Realm Auto-generated	& Change	R				
	Timezone		0 5				
	America/New_York	 Add an a 	admin to the account 🔞				
	« Cancel			Next »			

- a. Create an Account Name (i.e.; ABC Company)
- b. The Account Realm will auto generate upon saving the information.

The Account Realm suffix should never be changed or edited! (See Overview)

- c. Select the correct time zone for your customer.
- d. If you would like to add an admin at this time, click "Add an admin to the account" (keep in mind this can also be done later) and go to Step 4. If you are not adding an admin at this time, click next and go to Step 5
- 4. If you have selected to add an admin, the screen will update or extend to allow for that information.

Account Name		I KNOW IT STUFF
Account Realm Auto-generated	& Change	R
Timezone America/Los_Angeles	٣	I changed my mind, who needs an admin?
Admin first name		Admin last name
Admin email address 🛛 😡		Admin contact number
Auto-generate pass	word	Manually type password

Enter First Name, Last Name, email and contact phone number for your admin. You can autogenerate a password or create one manually. Click next.



5. On the Call Restrictions tab, select how many unlimited trunks you would like to allocate to this customer. This would be the number of concurrent calls your customer should need and this number will be part of your total trunks set at your reseller level. Trunks can be inbound, outbound or two-way and a combination can be used.



Set limits for included simultaneous inbound and outbound calls

Twoway trunks	10	
Inbound trunks	3	
Outbound trunks	4	

6. Call restrictions must also be set here, as well as credit balance additions and bypass.

This account can place calls to	Manage credit balance 🛛 🚱
 ✓ US TollFree ✓ US Toll 	Per minute credit balance: \$0
Emergency Dispatcher Caribbean	Add to the current balance: 10
 ✓ US DID ☐ International ☐ Other than above 	Allow customers to make per-minute calls that go over the above limit, and bill them the per-minute cost of the call

Call restrictions



7. Click next to proceed to the next tag, which is Permissions.

8. In the Permissions tab, you are selecting which items your customer can access.

elect what your custome	(
SETTINGS	More Balance Settings	
☑ User ☑ Account	 Show Credit Information Show Minutes Information 	
BILLING		
Credit Card		
Per Minute		
Service Plan		
Transactions		
TRUNKING		
🔄 Inbound		
Outbound		
Twoway		
MISC		
VI Errors Log		

Keep in mind there may be items that you do not want your customer to be able to access. For example, if you are charging them for trunks, you may not want them to have the ability to add trunks without your knowledge.

9. Click Submit. You should now see your newly created customer in your list on the left on the Accounts Manager home page.