Account Codes

This covers the setup and use of Account Codes.

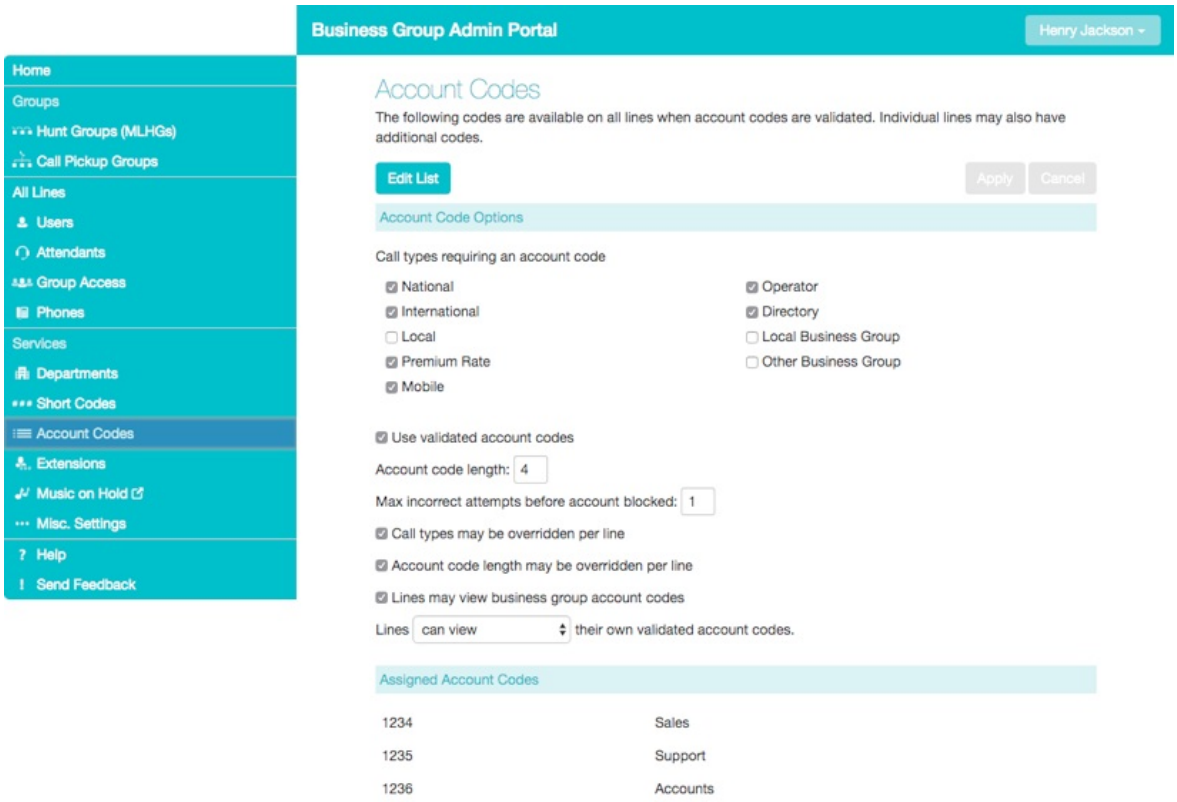
- Viewing and Modifying Account Code Setting
- Setting Individual Line Properties
- Configuring Account Codes
- Viewing and Modifying Account Code Settings For a Line
- Unblocking Account Codes

Viewing and Modifying Account Code Setting

Account Codes are not enabled by default. Please contact your Administrator for further information. Viewing and modifying account code settings.

Modifying call types requiring account codes

Use the checkboxes on the Account Codes page to specify which types of calls will require account codes:



- National – Whether account codes are required for long distance calls.
- International – Whether account codes are required for calling international numbers.
- Local – Whether account codes are required for local calls.
- Premium Rate –Whether account codes are required for premium rate (1-900 number) calls.
- Mobile - Whether account codes are required for mobile calls.
- Operator – Whether account codes are required for operator calls.
- Directory – Whether account codes are required for directory (411) calls.
- Local Business Group – Whether account codes are required for local calls to other numbers within your business. Normally calls within your business will be local calls, but if you have multiple sites calls between numbers may be regional or national calls. In this case you need to use the Other Business Group setting.
- Other Business Group – Whether account codes are required for non-local calls to other numbers within your business

Note: You cannot require an account code for emergency calls, toll-free calls, or calls to service access codes.

Once you have selected the call types, click Apply to save your changes.

Choosing Validated or Non-validated Account Codes

To use Validated Account Codes, follow these steps:

1. Check Yes after User validated account codes.
2. Click Apply.

To use Non-validated Account Codes, follow these steps:

1. Check No after User validated account codes.
2. Click Apply.

Setting Account Code Length

To specify the length that should be used by your account codes, follow these steps:

1. Enter the length in the text box after Account code length:
2. Click Apply.

Blocking Access After Incorrect Account Codes

If you are using Validated Account Codes, a user's phone line will be blocked after an incorrect account code is entered too many times in succession. To change the number of incorrect entries the user is allowed, follow these steps:

1. Enter the value in the text box after Max incorrect attempts before account is blocked:
2. Click Apply.

Setting Individual Line Properties

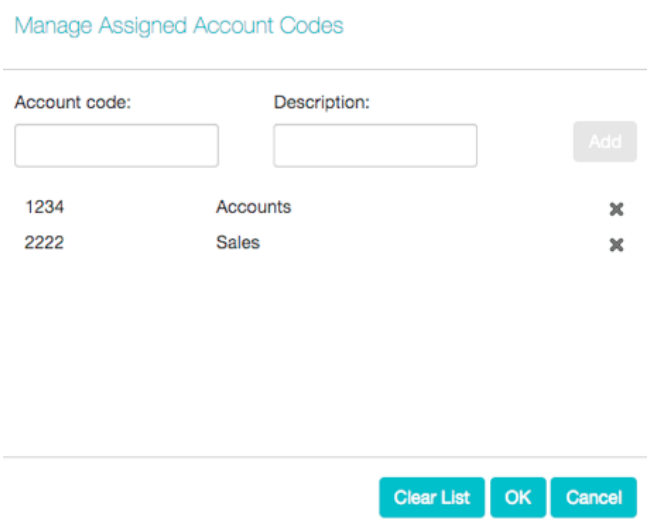
To specify whether various settings can also be specified for each line in your business, perform one of the following operations.

- To allow which types of calls require account codes to be changed for each line, check Call types may be overridden per line.
- To allow the length of account codes to be changed for each line, check Account code length may be overridden per line.
- To allow lines to view the account codes that you have defined for the whole business, check Lines may view business group account codes.
- Set whether each line should be able to view, or both view and change, or not view their own account codes by selecting the relevant setting from the dropdown list at the bottom of the Account Code Options section.
- If you want to have per line account codes, but don't want the user to be able to configure these, configure these by logging on to CommPortal as that user.
- Once you have made your changes, click Apply to save them.

Configuring Account Codes

To modify the account codes, click on Edit List at the top of the Accounts code page.

The following screen appears



To add an account code, follow these steps:

- Enter the code in the Account code text box.
- Enter the description in the Description text box.
- Click on Add.

1. To remove an account code, click the delete icon to the right of the account code.
2. To change the description of an account code, remove it and then re-add it with the new description.
3. Once you have finished making changes, click on OK.
4. To save your changes you must now click Apply.

Viewing and Modifying Account Code Settings For a Line

If you want to view or change a particular line's account code settings, follow these steps:

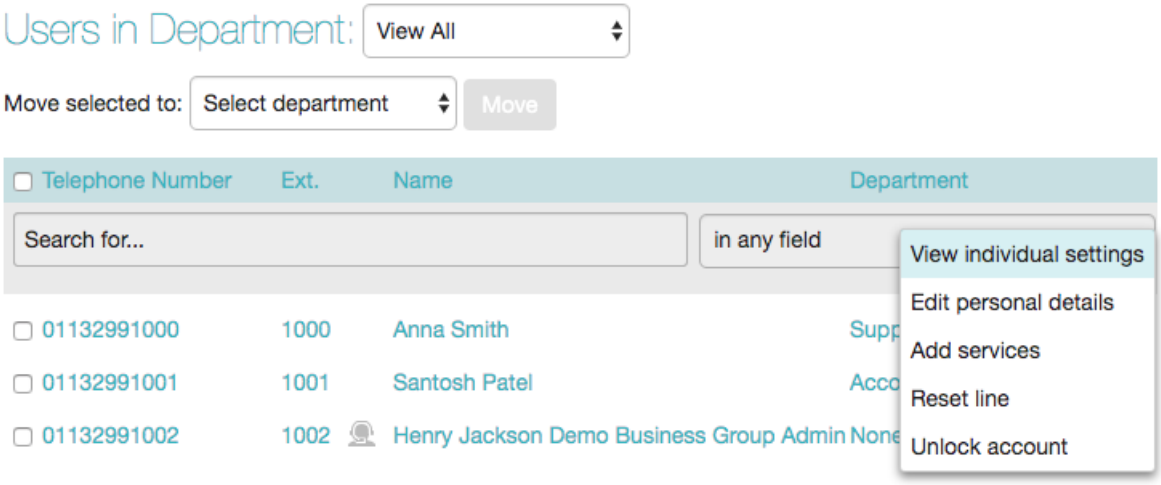
1. Change the settings to allow you to do this as described in here
2. Go to the Lines page in CommPortal and log in as the line whose settings you wish to change. Information can be found here.

Once you have logged in as this user, follow the instructions for modifying account codes in CommPortal End User Guide.

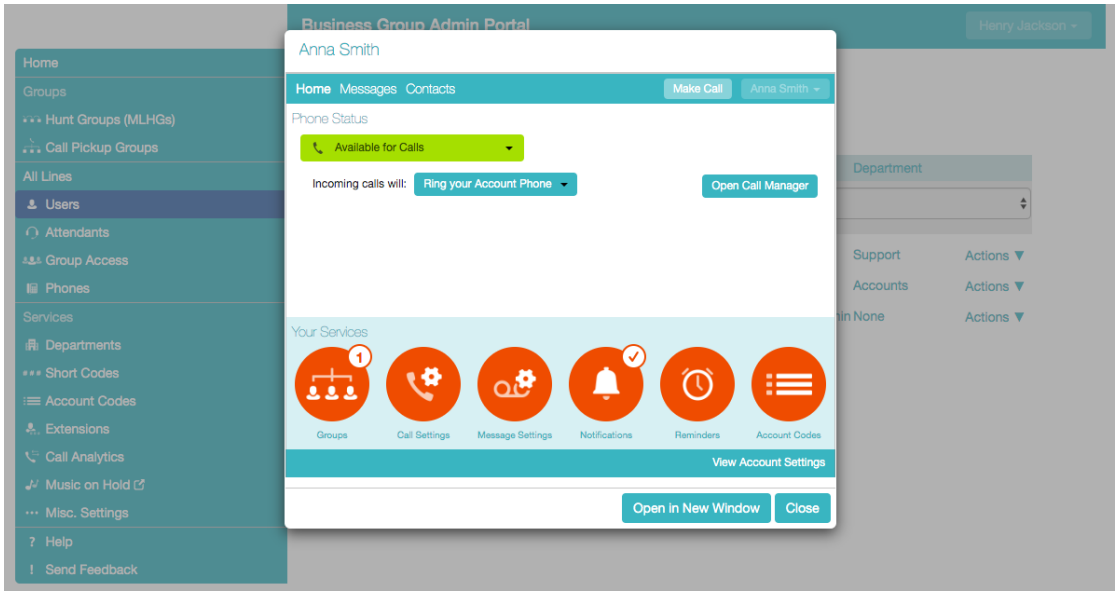
Unblocking Account Codes

If a subscriber has entered an incorrect account code too many times they will become blocked. To unblock a subscriber please follow these instructions:

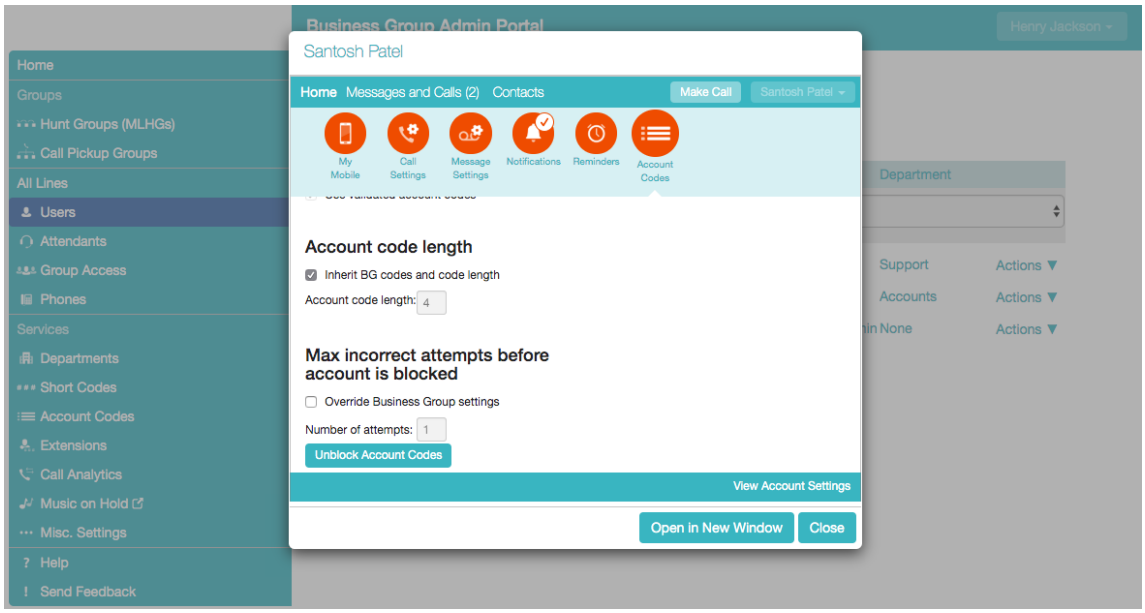
- Login into the CommPortal as the Administrator
- Click on **Users** from the menu on the left.
- On the user that has been blocked click on **Actions** then **View individual settings**



- This will open a new window where you can view the settings for that subscriber.



- Click on **Account Codes**. You can also click on Open in New Window this will open a full sized window that may be easier to work with.



- Scroll down and click on **Unblock Account Codes.** The pop window will refresh, then click on **Close** the subscriber is now unblocked.
- Please request the subscriber to retest his line.