

Account Codes

This covers the setup and use of Account Codes.

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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:

The screenshot shows the 'Business Group Admin Portal' interface. On the left is a teal sidebar with a navigation menu including: Home, Groups (with sub-items Hunt Groups (MLHGs) and Call Pickup Groups), All Lines (with sub-items Users, Attendants, Group Access, and Phones), Services (with sub-items Departments, Short Codes, and Account Codes), Extensions, Music on Hold, Misc. Settings, Help, and Send Feedback. The 'Account Codes' option is highlighted. The main content area has a teal header with 'Business Group Admin Portal' and a user profile 'Henry Jackson'. Below the header, the 'Account Codes' section includes a description: 'The following codes are available on all lines when account codes are validated. Individual lines may also have additional codes.' There is an 'Edit List' button and 'Apply' and 'Cancel' buttons. The 'Account Code Options' section contains two columns of checkboxes for 'Call types requiring an account code': National, International, Local, Premium Rate, Mobile, Operator, Directory, Local Business Group, and Other Business Group. Below this are checkboxes for 'Use validated account codes', 'Account code length' (set to 4), 'Max incorrect attempts before account blocked' (set to 1), 'Call types may be overridden per line', 'Account code length may be overridden per line', and 'Lines may view business group account codes'. The last option is expanded to show 'Lines can view their own validated account codes.' At the bottom, the 'Assigned Account Codes' section shows a table with three rows: 1234 for Sales, 1235 for Support, and 1236 for Accounts.

Assigned Account Codes	
1234	Sales
1235	Support
1236	Accounts

- 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

Manage Assigned Account Codes

Account code:	Description:	
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>
1234	Accounts	✕
2222	Sales	✕

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**

Users in Department: View All

Move selected to: Select department Move

<input type="checkbox"/>	Telephone Number	Ext.	Name	Department
<input type="checkbox"/>	01132991000	1000	Anna Smith	Support
<input type="checkbox"/>	01132991001	1001	Santosh Patel	Accounts
<input type="checkbox"/>	01132991002	1002	Henry Jackson Demo Business Group Admin None	

Search for... in any field

- View individual settings
- Edit personal details
- Add services
- Reset line
- Unlock account

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

Business Group Admin Portal

Anna Smith

Home Messages Contacts Make Call Anna Smith

Phone Status

Available for Calls

Incoming calls will: Ring your Account Phone Open Call Manager

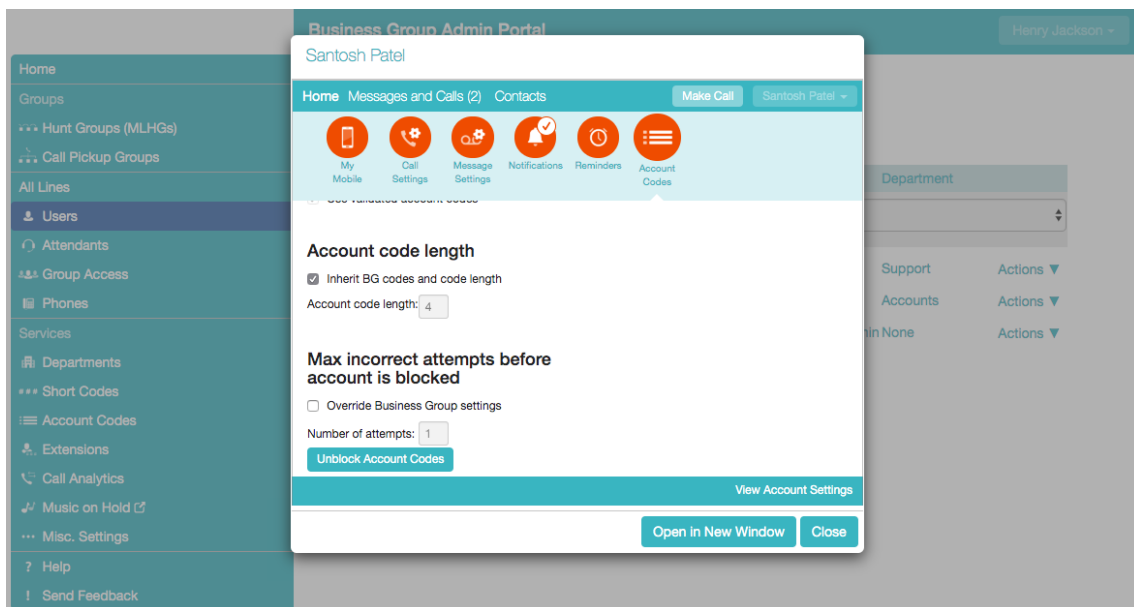
Your Services

- Groups
- Call Settings
- Message Settings
- Notifications
- Reminders
- Account Codes

View Account Settings

Open in New Window Close

- 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.