

BillNow

Customer Portal User Guide

Version 1.0

elitegroup

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1. Getting Started

1.1 Accessing the Portal

BillNow is a self-service billing portal that gives you visibility of your usage, charges, invoices, and account management tools - all in one place.

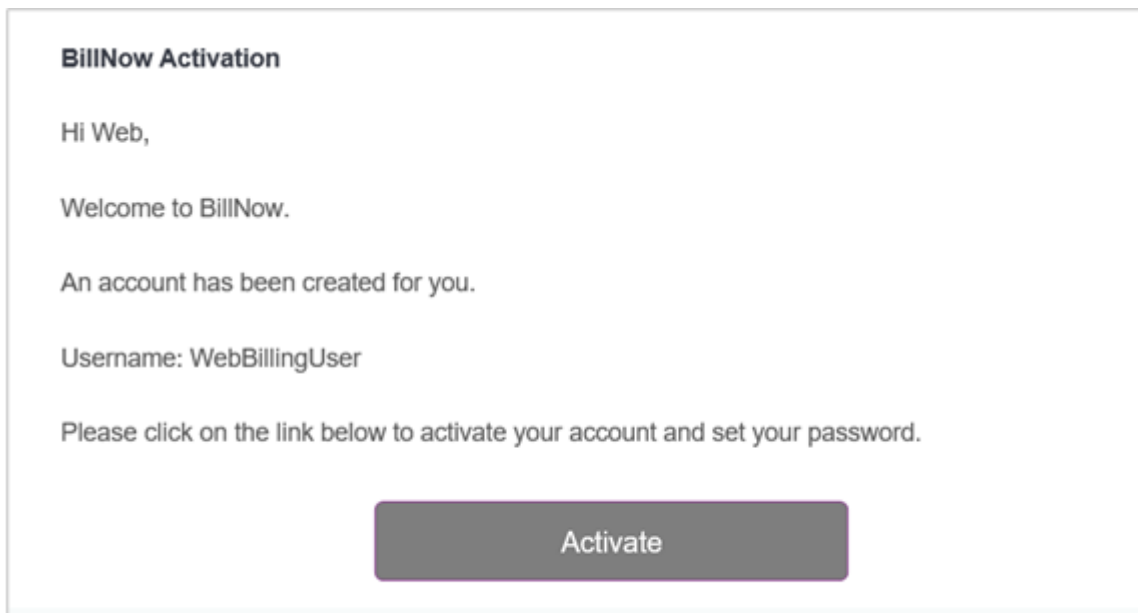
The portal can be accessed using the following URL: <https://elite.billnow.com/>

Before you can log in, a user profile must be created for you by your administrator. Once created, you will receive an activation email to set up your account.

Activating Your Account

When your account is set up, you will receive an activation email. Follow these steps to activate your account:

1. Open the activation email and click the Activate button.
2. You will be taken to the Activate Account page. Enter and confirm your new password.
3. Once your password is set, a Confirmation Message will appear with a link to the login page.
4. Click the link to go to the BillNow Login page and sign in with your new credentials.



Activate Account

Please set your new password below to activate your account

Your password must have:

- A minimum of 8 characters including
- 1 number
- 1 lowercase character
- 1 uppercase character
- 1 non-alphanumeric (special) character

NEW PASSWORD

CONFIRM PASSWORD

Activate

[Log in with your credentials](#)

Activate Account

Please set your new password below to activate your account

Your password must have:

- A minimum of 8 characters including
- 1 number
- 1 lowercase character
- 1 uppercase character
- 1 non-alphanumeric (special) character

NEW PASSWORD

CONFIRM PASSWORD

Activate

Thank you. Your account has been activated and password has been set successfully.

[Log in with your credentials](#)

Log In

Sign in below. If you can't remember your login details, you can [reset your password here](#).

USERNAME

WebBillingUser

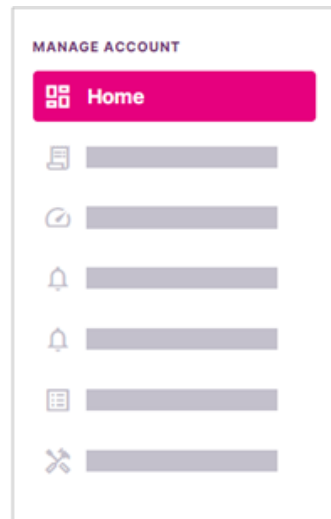
PASSWORD

Log in securely

2. Navigation & Profile Management

2.1 Portal Navigation

Once logged in, use the left-hand side menu to navigate the portal. Selecting a menu item refreshes the main area to display the relevant information.



2.2 Managing Your Profile

At the bottom of the navigation menu, click your username to access your profile options:

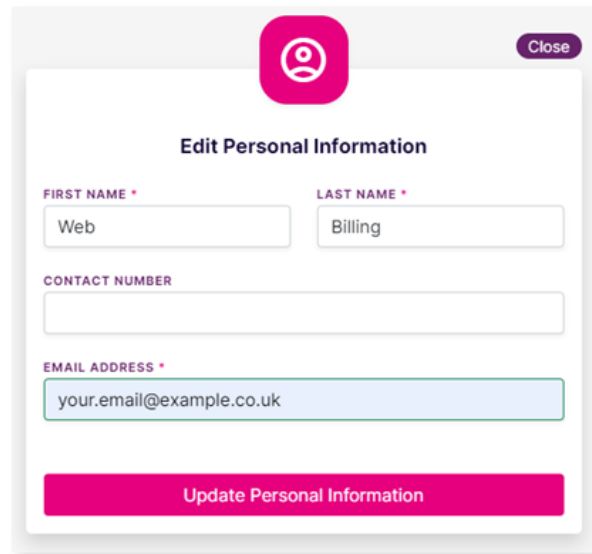
- View and amend your Profile.
- Sign out of the portal.

Editing Contact Information

Select Profile to review and update your contact details. Click Edit Contact Information to update the following:

- First Name
- Last Name
- Contact Number
- Email Address

Click Update Personal Information to save your changes.



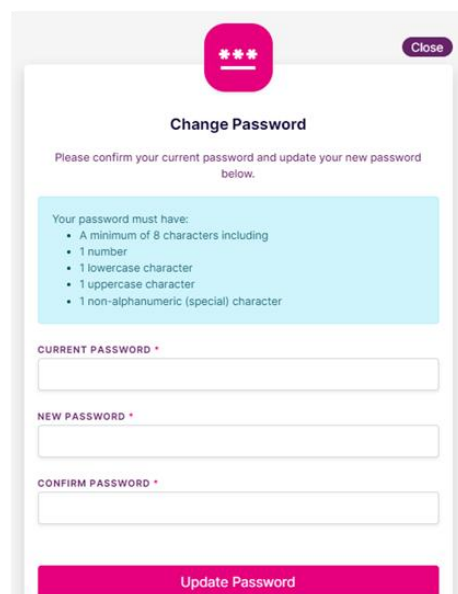
The screenshot shows a modal window titled "Edit Personal Information". At the top left is a pink circular icon with a white person silhouette, and at the top right is a "Close" button. The form contains the following fields:

- FIRST NAME ***: Input field with "Web" entered.
- LAST NAME ***: Input field with "Billing" entered.
- CONTACT NUMBER**: Empty input field.
- EMAIL ADDRESS ***: Input field with "your.email@example.co.uk" entered.

At the bottom of the form is a pink button labeled "Update Personal Information".

Changing Your Password

Select Update Password to change your password. You must enter your current password before entering and confirming a new one.



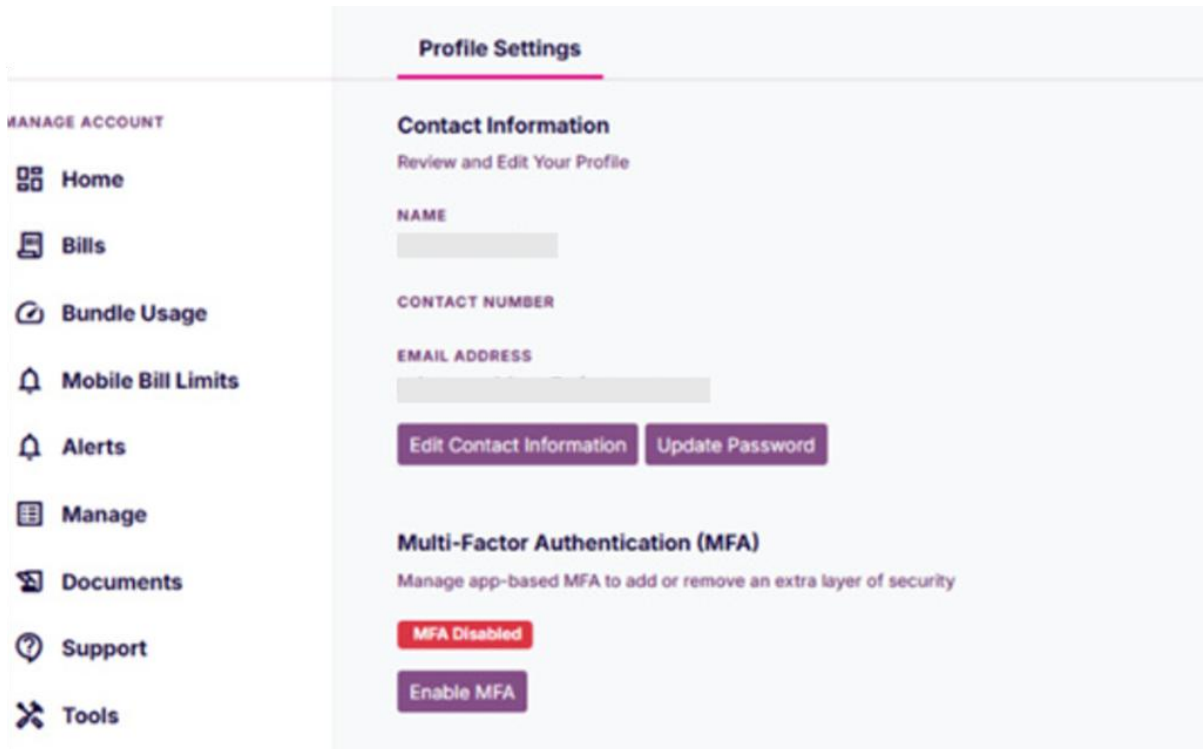
The screenshot shows a modal window titled "Change Password". At the top left is a pink circular icon with three white asterisks, and at the top right is a "Close" button. The form contains the following elements:

- Instruction: "Please confirm your current password and update your new password below."
- Requirements box (light blue background):
 - Your password must have:
 - A minimum of 8 characters including
 - 1 number
 - 1 lowercase character
 - 1 uppercase character
 - 1 non-alphanumeric (special) character
- CURRENT PASSWORD ***: Input field.
- NEW PASSWORD ***: Input field.
- CONFIRM PASSWORD ***: Input field.

At the bottom of the form is a pink button labeled "Update Password".

2.3 Multi-Factor Authentication (MFA)

Multi-Factor Authentication (MFA) adds an additional layer of security to your account by requiring two forms of verification: your password and a time-sensitive code from an authenticator app. This helps protect your account even if your password is compromised.

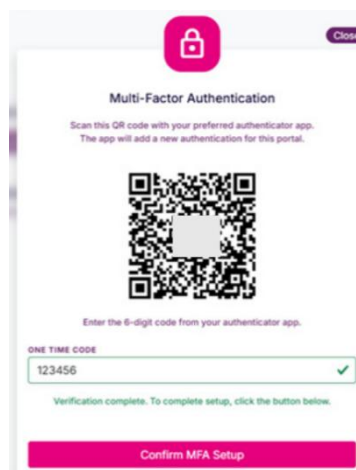


Note: MFA must be activated at the account level before individual users can enable it. Please contact your Account Manager if you wish to enable MFA for your organisation.

Setting Up MFA

1. Log in to your account and navigate to Manage > Profile Settings.
2. Scroll to the Multi-Factor Authentication (MFA) section and click Enable MFA.
3. Use your authenticator app (e.g. Google Authenticator, Microsoft Authenticator, or Authy) to scan the QR code displayed on screen.
4. Enter the 6-digit code shown in your authenticator app. A green tick will confirm the code is correct.

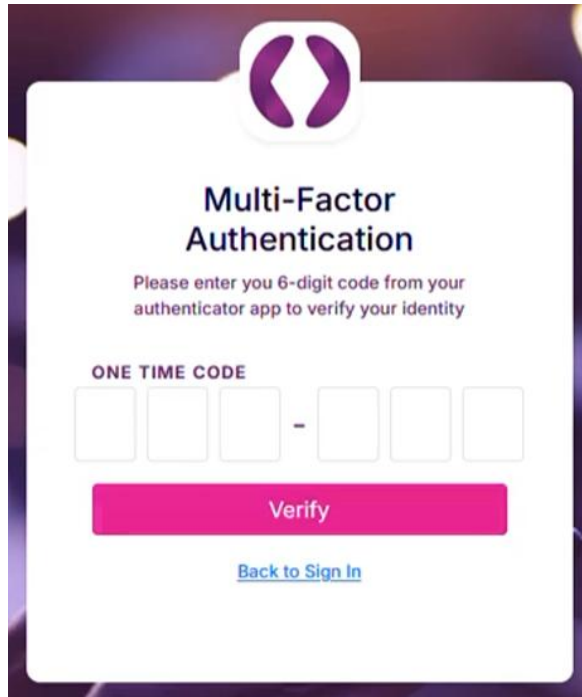
Your Profile Settings will now show MFA as Enabled.



Note: Save your backup codes securely in case you lose access to your authenticator device.

Logging In with MFA

Once MFA is set up, you will be prompted to enter a one-time code from your authenticator app after entering your username and password. This ensures that only you, with access to your registered device, can log in.



Multi-Factor Authentication

Please enter your 6-digit code from your authenticator app to verify your identity

ONE TIME CODE

-

Verify

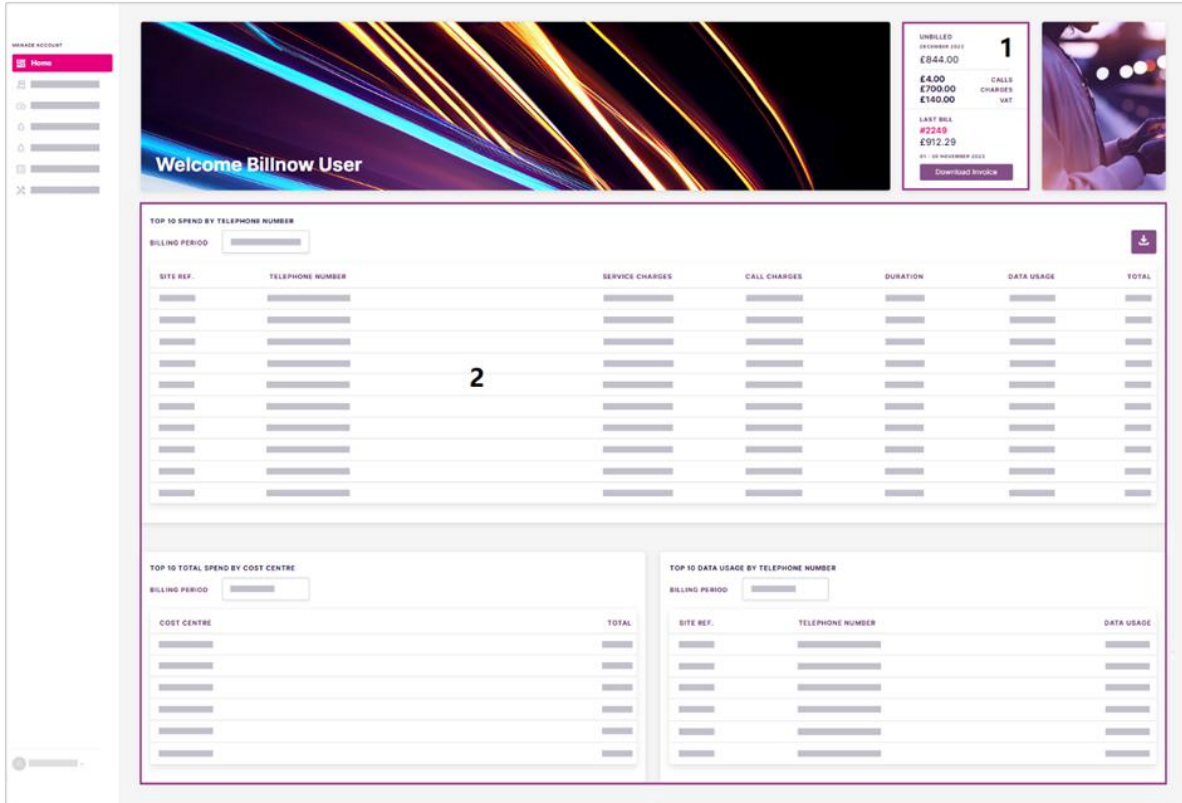
[Back to Sign In](#)

Disabling MFA

To remove MFA from your account, navigate to your Profile screen and click Disable MFA.

3. Home Screen

The Home page gives you an at-a-glance summary of your billing information. It has two main sections.

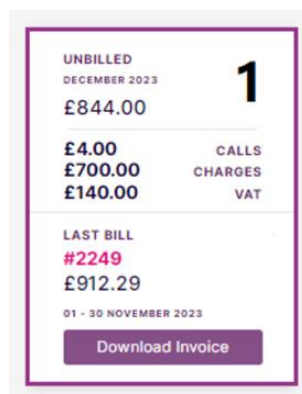


3.1 Unbilled Usage Summary (Section 1)

The upper section displays headline figures for the current unbilled usage. This covers Monthly and Daily Billing Periods, showing:

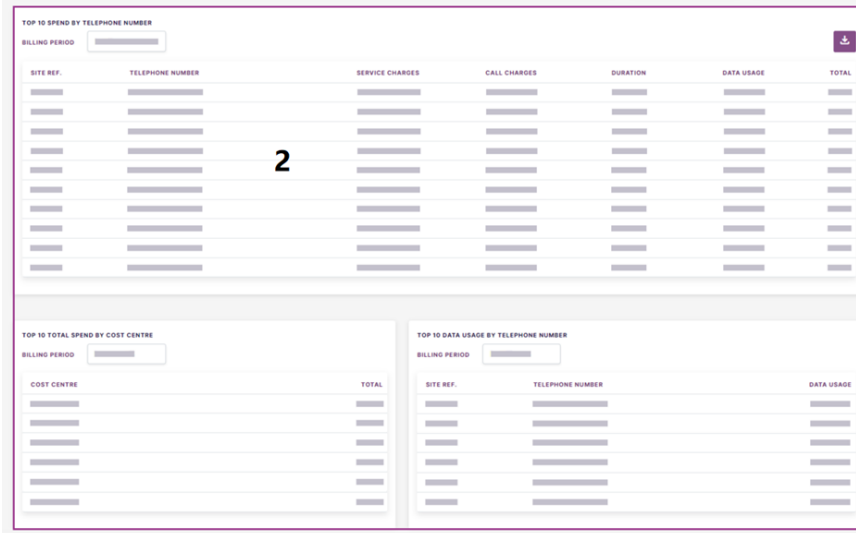
- Net Calls and Charges
- VAT
- Total Unbilled amount

You can also download your most recent invoice in PDF format using the Download Invoice button.



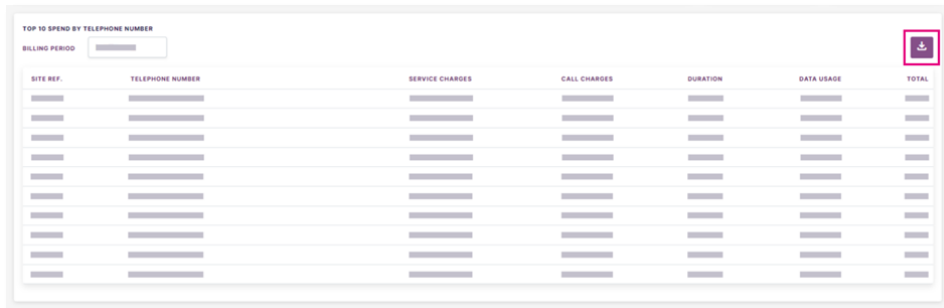
3.2 Key Monthly Statistics (Section 2)

The centre of the Home page displays three widgets for the current unbilled month. Use the Billing Period selector to view a different month.



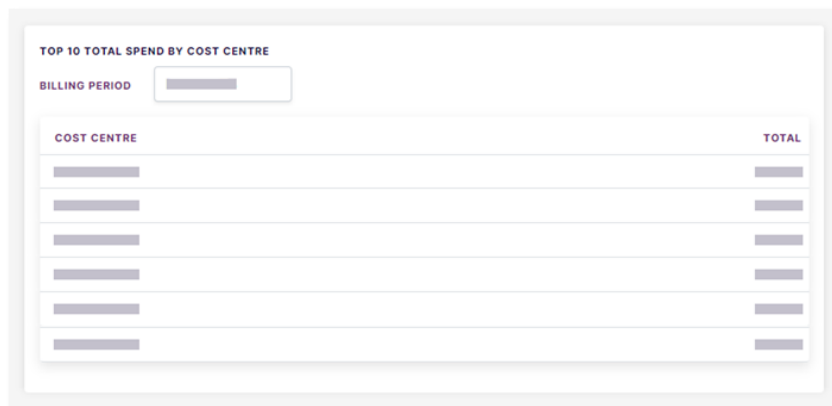
Top 10 Spend by Telephone Number

This widget shows total spend by Billing ID, broken down by Service Charges and Call spend, including Call Durations and Data Usage. Click the download icon to export the data as a .csv file.



Top 10 Total Spend by Cost Centre

This widget shows total spend by Cost Centre, ranked from highest to lowest.



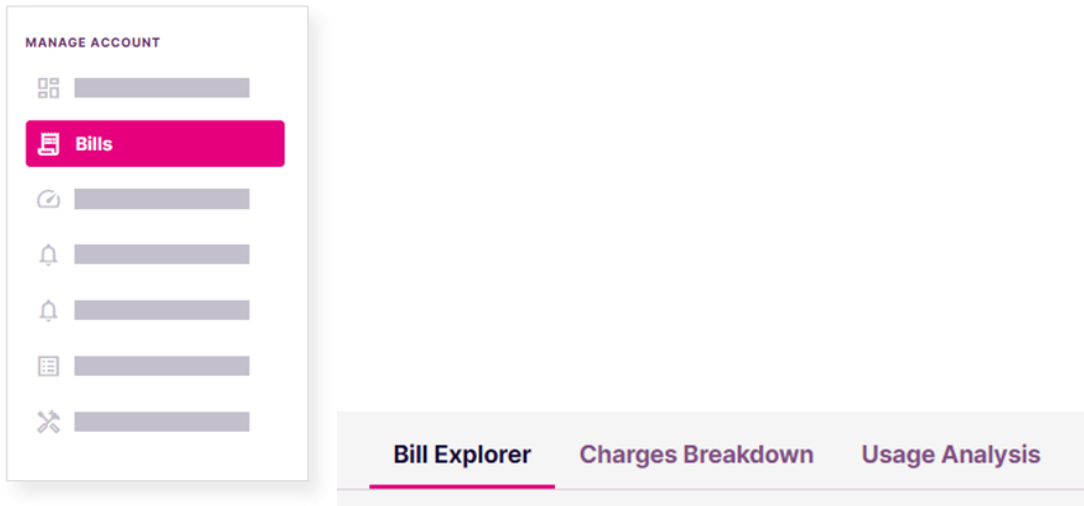
Top 10 Data Usage by Telephone Number

This widget shows data usage by Billing ID, ranked from highest to lowest.

SITE REF.	TELEPHONE NUMBER	DATA USAGE

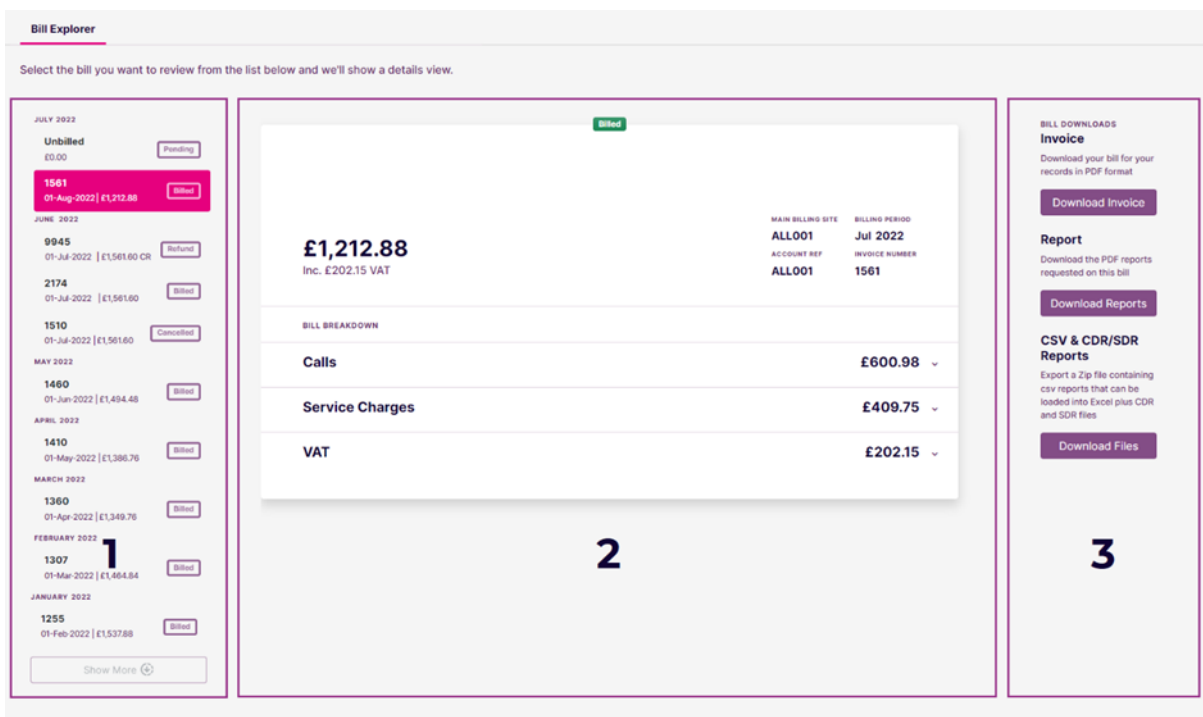
4. Bills

The Bills section is divided into three tabs: Bill Explorer, Charge Breakdown, and Usage Analysis. You can also access Reports from here.



4.1 Bill Explorer

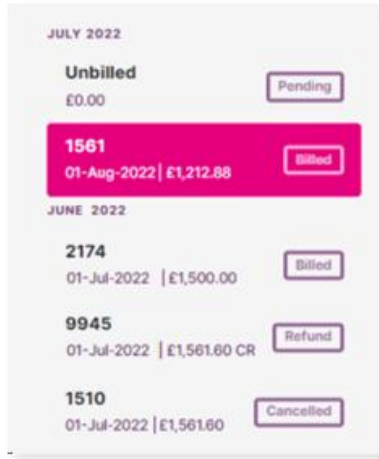
The Bill Explorer shows a summary of the current unbilled month and lets you view and download historic invoices and reports.



The Bills page has three sections:

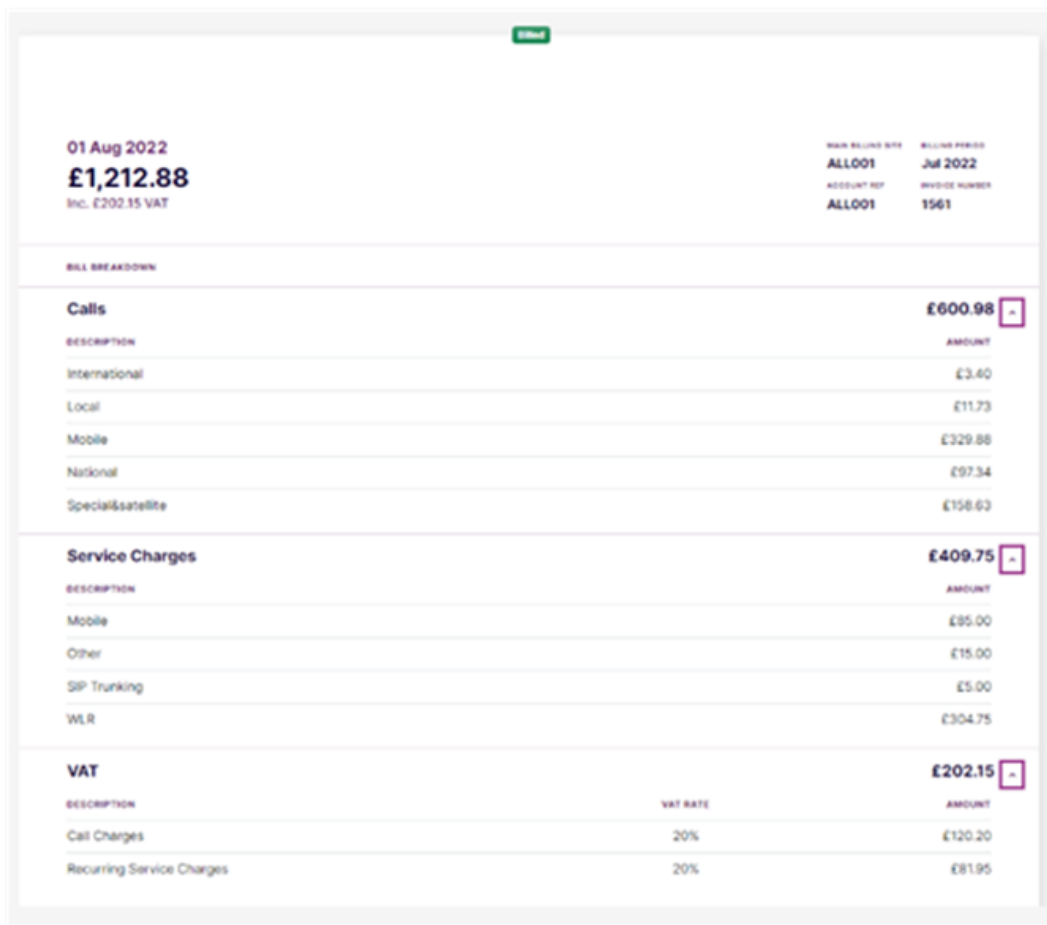
Section 1 – Bill Selector

Select a bill to explore. A summary will appear in the centre of the page.



Section 2 – Invoice Summary

Displays the total bill value and a breakdown of Calls, Service Charges, and VAT. Expand each section for a detailed breakdown.



Section 3 – Bill Downloads

Download your Invoices or Reports in PDF format. CSV and CDR/SDR files are available where applicable.

BILL DOWNLOADS

Invoice

Download your bill for your records in PDF format

[Download Invoice](#)

Report

Download the PDF reports requested on this bill

[Download Reports](#)

CSV & CDR/SDR Reports

Export a Zip file containing csv reports that can be loaded into Excel plus CDR and SDR files

[Download Files](#)

4.2 Charge Breakdown

The Charge Breakdown tab lets you browse charges for reporting and analysis. You can adjust columns, apply filters, and save custom views.

The screenshot shows the 'Charge Breakdown' tab in the Bill Explorer interface. It includes a sidebar for account management, a main header with 'Charge Breakdown' and 'Usage Analysis' tabs, and a table of charges. The table has columns for Billing Period, Site Ref, Cost Centre, Invoice, Calls/Services, Billing ID, VAT Rate, Billing ID Type, Destination, Duration, Usage, and Calls Number of Cal. The table contains 15 rows of data, all showing 'Service' charges with a 20% VAT rate and 0 usage. A 'BILLS FROM: Current' filter is applied. The interface also features a 'Select View' dropdown, a 'Save View' button, and a 'Columns' menu.

BILLING PERIOD	SITE REF	COST CENTRE 1	INVOICE	CALLS/SERVICES	BILLING ID	VAT RATE	BILLING ID TYPE	DESTINATION	DURATION	USAGE	CALLS NUMBER OF CAL
30/11/2023	Site Ref 1			Service	01630222222	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630222222	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630222222	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630222222	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630222222	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630222222	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630222222	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630222222	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630222222	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630222222	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630234567	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630234567	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630234567	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630234567	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630234567	20%			00:00:00	0	
30/11/2023	Site Ref 1			Service	01630234567	20%			00:00:00	0	

Default Columns

The default grid includes the following column groups:

Common Columns

Field	Details
Billing Period	The billing period related to the charge.
Site Ref	The site reference related to the charge.
Cost Centre 1	The cost centre set against the Billing ID.
Invoice	The allocated invoice number, if the data has been billed.
Calls / Services	Indicates whether the charge relates to a call or a service.
Billing ID	The Billing ID or Presentation Alias (if set).
Price (£)	The total sell price for the data displayed.

Calls Columns

Field	Details
Billing ID Type	The line type set against the Billing ID.
Destination	The destination of the call.
Duration	The duration of the calls (hours, minutes, seconds).
Usage	Data usage amount for the call.
Calls	Number of calls included in the row.
Rate (ppm)	The calculated pence-per-minute sell rate.

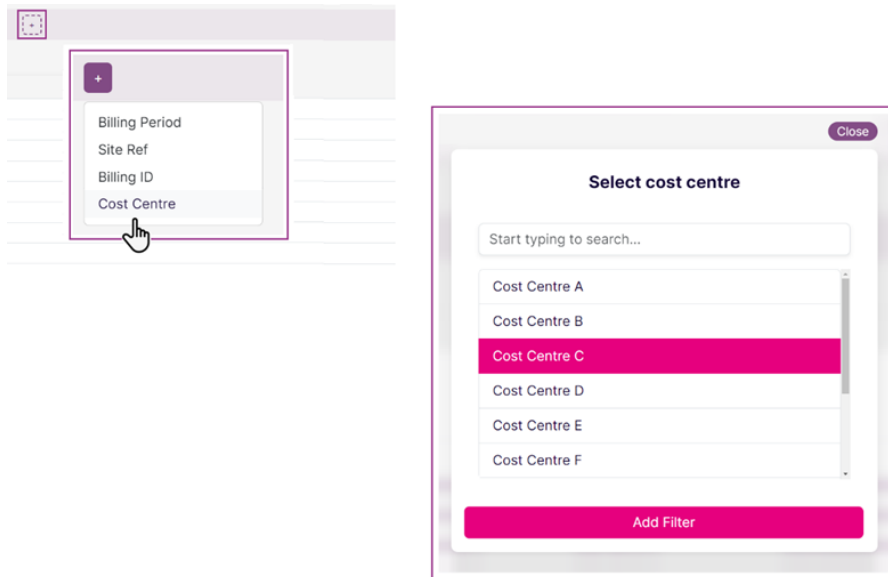
Service Columns

Field	Details
Description	The description of the service charge.
Billing Category	The billing category of the service charge.
Frequency	Billing frequency: One-off, Monthly, Quarterly, or Annual.
Billed From	The period from which the service charge was billed.
Billed To	The period to which the service charge was billed.
Quantity	Number of service charges in the row.

Data is sorted alphabetically by Site Ref, then Cost Centre, then Billing ID. Reorder by clicking a column header. Results show 15 per page; use the dropdown to increase to 25 or 50.

Filtering Data

Click the Filter (+) icon next to the Billing Period to apply filters.



Bill Explorer **Charge Breakdown** Usage Analysis

Charge Breakdown

Select View

Click on the + below to filter your charges

BILLING PERIOD Current COST CENTRE Cost Centre C

Show 15 entries

SITE REF	↑↓ COST CENTRE 1	↑↓ BILLING ID	↑↓ PRICE (£)
Site Ref 2	Cost Centre C	01278222222	£95.00
Site Ref 4	Cost Centre C	07791234567	£25.48

Showing 1 to 2 of 2 entries **1**

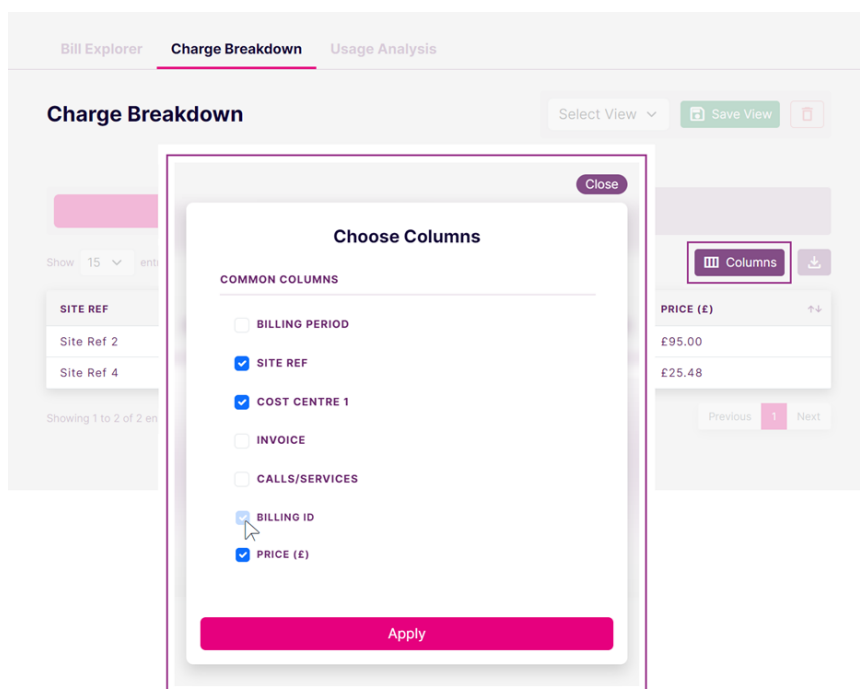
Field	Details
Billing Period	Pre-selected to the current period. Select one or more periods (format: Month + Year, e.g. March 2023). Removing a period re-applies the current billing period.
Calls / Services	Filter by Calls, Services, or both.
Site Ref	Multi-select list of sites. Enter 2+ characters to search.
Cost Centre 1	Multi-select list of cost centres. Enter 2+ characters to search.
Billing ID	Enter the full Billing ID or Presentation Alias.

Field	Details
Invoice	Filter by invoice number. Enter 2+ characters. Multi-select.
VAT Rate	Multi-select list of VAT rates.
Duration From/To	Filter by a duration range (HH:MM:SS).
Usage From/To	Filter by data usage in MB.
Destination	Filter by call destination. Enter 2+ characters. Multi-select.
Billing ID Type	Filter by line type. Enter 2+ characters. Multi-select.
Billing Category	Filter by billing category for service charges. Multi-select.
Frequency	Filter by one or more predefined service charge frequencies.

Note: To apply a filter, select the filter type, enter 2 or more characters to return matching values, highlight at least one option, then click Add Filter. Selected filters appear at the top of the grid. Click the x icon on any filter to remove it.

Choosing Columns

Click the Columns button at the top right of the table to open the Choose Columns pop-up. Select or deselect columns as required.



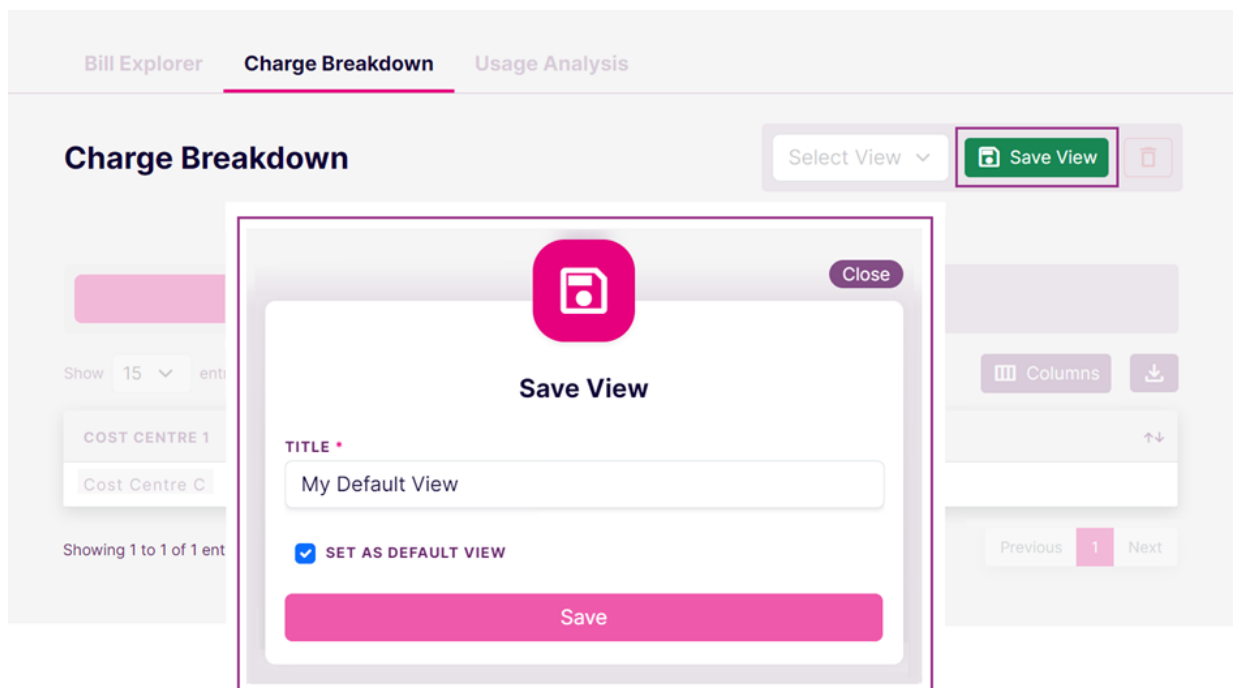
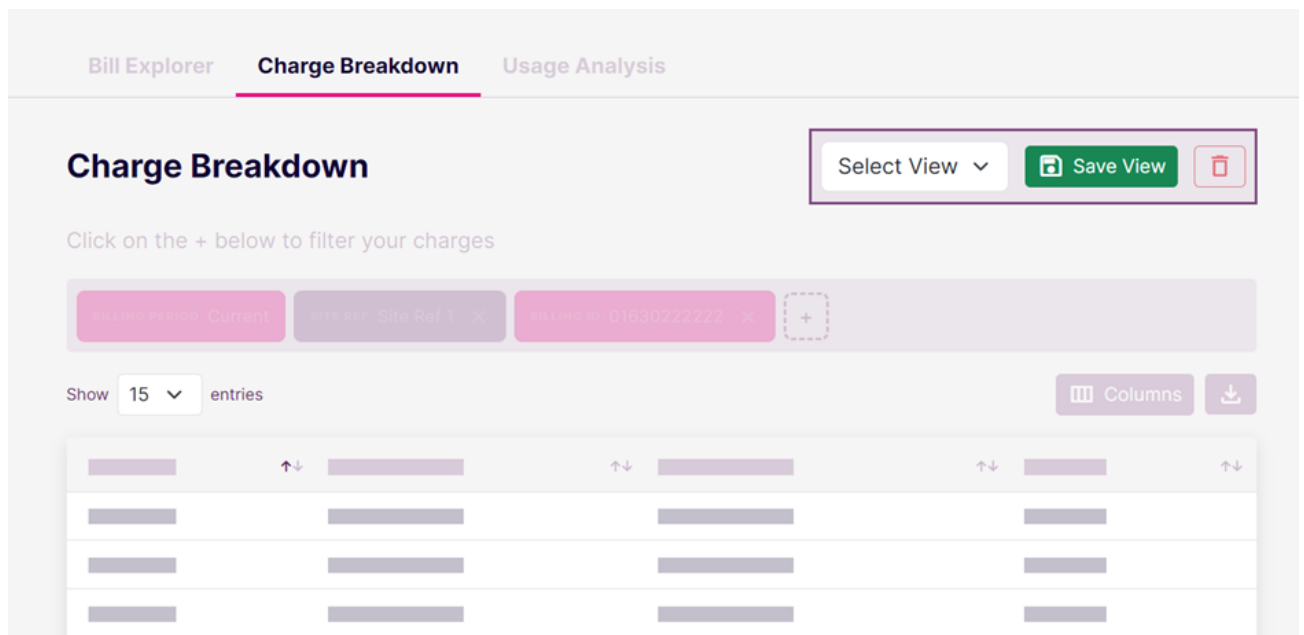
Note: Columns appear in a predefined order and cannot be rearranged. Aggregation of results changes based on the columns selected - rows sharing the same values are combined, with Price (£) showing the sum. For example, if you only have Site Ref and Cost Centre visible, all calls from the same site and cost centre will appear as a single row (Adding a Billing ID column will split those out further, showing a separate row for each number).

Saving, Selecting & Managing Views

Save and manage custom table views using the buttons at the top right of the page. Saved Views are available only to the user who created them.

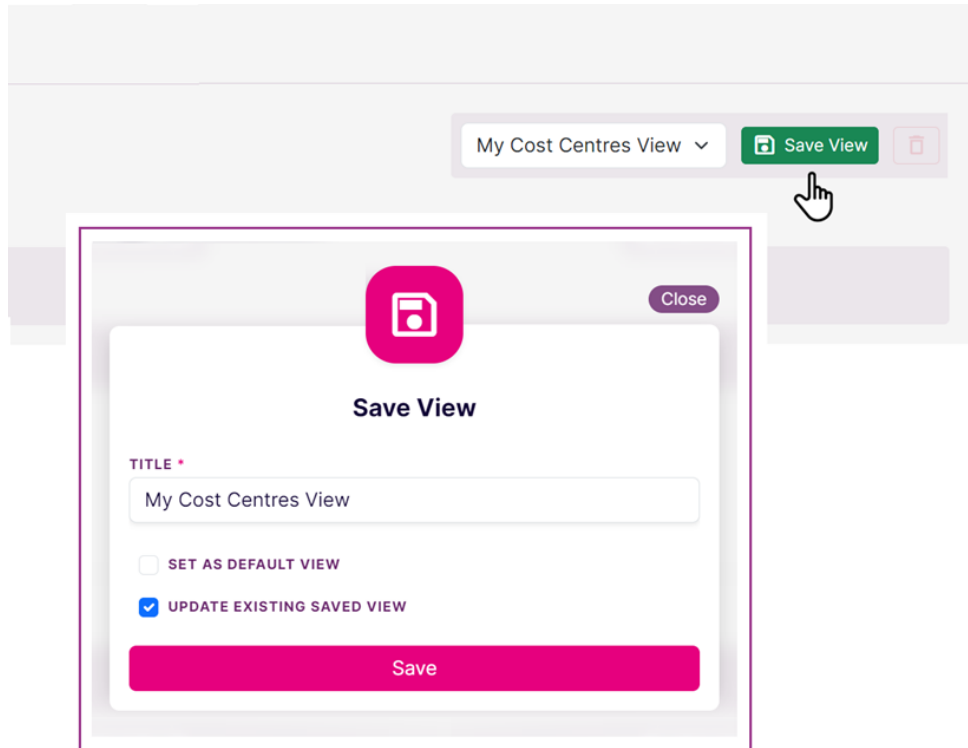
To save a view:

1. Choose the required filters and columns.
2. Click Save View.
3. Enter a descriptive title for the view.
4. Optionally tick Set as Default View to load this view automatically when you visit the page.
5. Click Save.

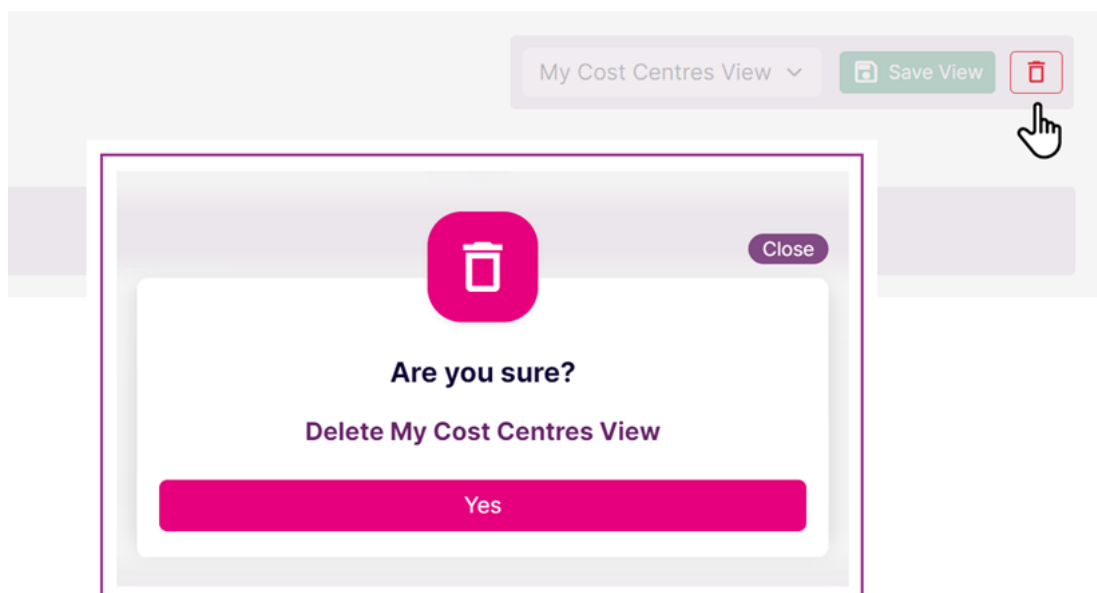


To update an existing view:

1. Choose additional filters or columns.
2. Click Save View.
3. Tick Update Existing Saved View to overwrite or untick and enter a new title to create a new view.
4. Click Save.

**To delete a view:**

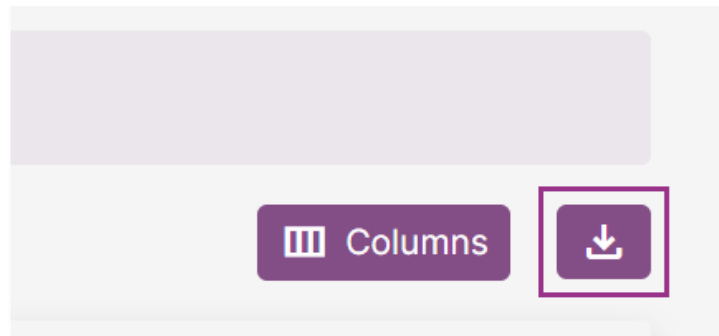
Click the Delete icon/button. Confirm deletion when prompted.



Downloading Charge Breakdown Results

Click the download icon to export the current filtered and column-selected view as a .csv file.

Note: Set your columns and filters before downloading to ensure the export contains the data you need.



4.3 Usage Analysis

The Usage Analysis tab lets you browse individual call records and usage data for reporting and analysis purposes.

The screenshot shows the 'Usage Analysis' tab in the Bill Explorer. It features a table with columns: NUMBER, NUMBER DIALLED, DESTINATION, CATEGORY, DATE, TIME, and COST (£). The table contains 15 rows of data. At the top right, there are 'Select View', 'Save View', and a print icon. At the bottom right, there are 'Columns' and 'Download' icons. The bottom of the screen shows a pagination bar with 'Showing 1 to 15 of 302 entries' and page numbers 1, 2, 3, 4, 5, Next.

NUMBER	NUMBER DIALLED	DESTINATION	CATEGORY	DATE	TIME	COST (£)
07394123456	Mobile Data	DATA United Kingdom	Mobile	28/05/2023	20:28:42	£0.00
07394234567	Mobile Data	DATA United Kingdom	Mobile	28/05/2023	02:18:39	£0.03
07394234567	07261253399	Mobile to Mobile (different network)	Mobile	28/05/2023	13:23:31	£0.00
07394234567	9011	Mobile Premium SMS	Mobile	28/05/2023	18:49:29	£0.00
07394234567	07202776897	Mobile SMS	Special&satellite	28/05/2023	20:30:02	£0.00
07394234567	07202776897	Mobile to Mobile (same network)	Mobile	28/05/2023	20:36:43	£0.00
07394234567	Mobile Data	DATA United Kingdom	Mobile	28/05/2023	21:59:08	£0.01
07394234567	Mobile Data	DATA United Kingdom	Mobile	28/05/2023	22:30:34	£0.01
07394234567	Mobile Data	DATA United Kingdom	Mobile	28/05/2023	23:22:05	£0.01
07791234567	Mobile Data	DATA UAE	Special&satellite	28/05/2023	03:00:00	£0.00
07791234567	Mobile Data	Mobile World Traveller	Special&satellite	28/05/2023	03:00:00	£4.00
07791234567	Mobile Data	DATA UAE	Special&satellite	28/05/2023	03:00:00	£0.00
07791234567	Mobile Data	Mobile World Traveller	Special&satellite	28/05/2023	10:25:48	£4.00
07791234567	0037100200300	UAE to Latvia	International	28/05/2023	15:56:22	£0.00
07791234567	Incoming Call	Roamed MT Rest of the World	International	28/05/2023	16:13:19	£0.00

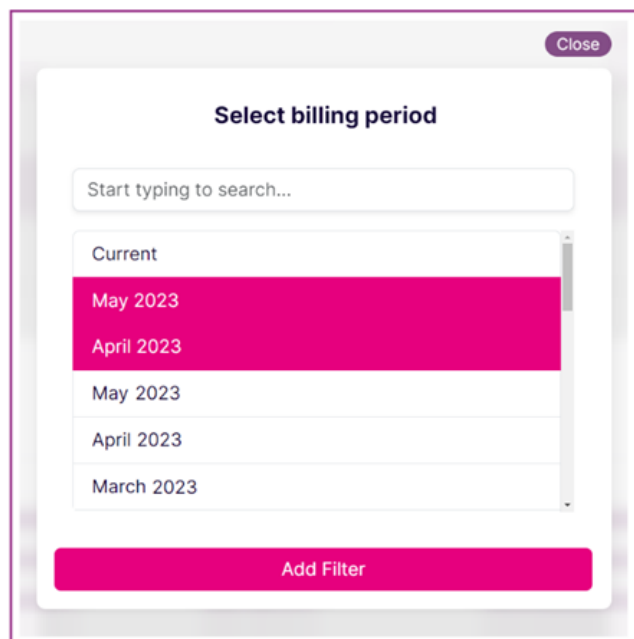
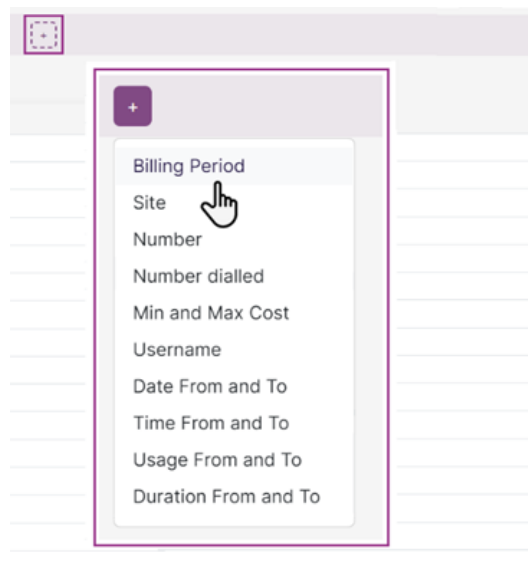
Default Columns

Field	Details
Number	The Billing ID or Presentation Alias.
Number Dialed	The number called.
Destination	The destination of the call.
Category	The category assigned to the charge group.

Field	Details
Date	The date of the call (as shown on the CDR).
Time	The time of the call (as shown on the CDR).
Cost	The cost of the call chargeable to the account.
Called From	The Billing ID or Presentation Alias (if set).
Duration	Duration in hours, minutes, and seconds.
Usage	Mobile data usage in MB.
Extension	Extension number, where Extension Billing is active.
Billing Reference	Allocated invoice number, if billed.
Username	Username assigned to the Billing ID.
Type	Call type assigned to the record.
Site	The site related to the data.
Company	The company name related to the data.
Billing Period	The billing period for the record.

Filtering Data

Click the Filter (+) icon to apply filters.



Bill Explorer Charge Breakdown **Usage Analysis**

Usage Analysis

Select View ▼ Save View 📄 🗑️

Click on the + below to filter your charges

BILLING PERIOD May 2023, April 2023 NUMBER Presentation Alias A × +

Show 15 ▼ entries Columns ☰ 📄

NUMBER	NUMBER DIALLED	DESTINATION	CATEGORY	DATE	TIME	COST (£)
Presentation Alias A	01785461400	Stafford	Local	15/05/2023	10:11:59	£0.00
Presentation Alias A	01785461400	Stafford	Local	15/05/2023	11:11:59	£0.00
Presentation Alias A	01785461400	Stafford	Local	15/05/2023	12:11:59	£0.00

Showing 1 to 3 of 3 entries Previous 1 Next

Results are continuously being updated. Currently displayed data might still differ from the data once the repricing process is completed.

Field	Details
Billing Period	Pre-selected to the current period. Select one or more periods.
Site	Multi-select list of sites. Enter 2+ characters to search.
Number	Enter the full Billing ID or Presentation Alias.
Number Dialed	Returns all records containing the number at any position.
Min and Max Cost	Filter by a cost range in £.
Username	Multi-select list of usernames. Enter 2+ characters to search.
Date From/To	Select a date range using the calendar icon (DD-MM-YYYY).
Time From/To	Select a time range using the clock icon (HH:MM:SS).
Usage From/To	Filter by usage range in MB.
Duration From/To	Filter by duration range (HH:MM:SS).

Choosing Columns, Saving Views & Downloading

The Usage Analysis tab has the same column chooser, saved views, and download functionality as the Charge Breakdown tab. Refer to Section 4.2 for detailed instructions.

Bill Explorer Charge Breakdown **Usage Analysis**

Usage Analysis

Select View Save View

Show 15

NUMBER
Presentation A
Presentation A
Presentation A

Showing 1 to 3 of 3

Choose Columns Close

- NUMBER
- NUMBER DIALLED
- DESTINATION
- CATEGORY
- DATE
- TIME
- COST (£)
- CALLED FROM

Apply

Columns

TIME	COST (£)
10:11:59	£0.00
11:11:59	£0.00
12:11:59	£0.00

Previous 1 Next

5. Reports

The Reports tab is available within the Bills section of the portal. It lets you generate a range of pre-built reports for the current or a previous billing period.

The screenshot displays the 'Reports' tab in the BillNow Customer Portal. The interface includes a navigation menu on the left with 'Bills' highlighted. The main content area has tabs for 'Bill Explorer', 'Charges Breakdown', 'Usage Analysis', and 'Reports'. Below the 'Reports' tab, there is a 'Reports' section with a dropdown for 'REPORT' (set to 'Select...'), a 'BILLING PERIOD' dropdown (set to 'June 2024'), and a 'SITE' dropdown (set to 'Select...'). A 'Generate' button is visible to the right of the 'SITE' dropdown. The bottom left corner shows a user profile icon and the text 'Billing'.

5.1 Access & Permissions

Only users with Company or Site level access can generate reports.

Note: User and Cost Centre logins do not have access to Reports. Company-level users see all sites in the Site dropdown; Site-level users only see the sites they have access to.

5.2 Running a Report

1. Navigate to the Bills section of the portal.
2. Select the Reports tab.
3. The current Billing Period is shown by default. Select an earlier period from the Billing Period dropdown if required.
4. Choose a Report from the Report drop-down menu.
5. If you have access to more than one site, select the required site from the Site dropdown.
6. Click Generate.
7. Choose your output format: PDF or CSV.

Note: If no data is available for the selected report, an on-screen message will be displayed.

5.3 Report Types

Field	Details
Line Breakdown	A breakdown of all Billing IDs for the chosen site. Includes: Billing ID, Billing ID Type, Line Description, Calls (#), Texts (#), Data (MB), Calls (£), Service Charges (£), Total (£).
Mobile User Summary	A breakdown of all mobile users and their charges per Billing ID. Includes: Billing ID, Username, Billing ID Type, Data (GB), Mins Usage, Texts, Service Charges (£), Out of Bundle (£), Total (£).
Site Spend	A breakdown per site for calls and services. Includes: Site Ref., Calls (#), Duration (Min), Texts (#), Usage (GB), Calls (£), Service Charges (£), Total (£).

5.4 Report Examples

Line Breakdown

Line Breakdown								
Company / Customer Name: Site Name 4								
Site Ref 4								
Billing Period: 30/11/2023								
Billing ID	Billing ID Type	Line Description	Calls	Texts	Data (MB)	Usage Charges (£)	Service Charges (£)	Total (£)
07394222222	Mobile	User A	22	4	778.5147	44.7382	0.00	44.7382
07394234567	Mobile	User B	36	25	3339.0049	188.6336	0.00	188.6336
07791234567	Mobile	User C	33	4	130.9425	20.0215	0.00	20.0215
07792345678	Mobile	User D	3	0	69.1475	0.1067	0.00	0.1067
07793456789	Mobile	User E	1	0	53.0723	0.5500	0.00	0.5500
07794567890	Mobile	User F	64	16	11.2970	18.6367	0.00	18.6367
Total			159	49	4381.9789	272.6867	0.00	272.6867

	A	B	C	D	E	F	G	H	I	J
1	Billing ID	Billing ID Type	Line Description	Calls	Texts	Data (MB)	Usage Charges (£)	Service Charges (£)	Total (£)	
2	07394222222	Mobile	User A	22	4	778.5147	44.7382	0	44.7382	
3	07394234567	Mobile	User B	36	25	3339.0049	188.6336	0	188.6336	
4	07791234567	Mobile	User C	33	4	130.9425	20.0215	0	20.0215	
5	07792345678	Mobile	User D	3	0	69.1475	0.1067	0	0.1067	
6	07793456789	Mobile	User E	1	0	53.0723	0.55	0	0.55	
7	07794567890	Mobile	User F	64	16	11.297	18.6367	0	18.6367	
8										
9										
10										

Mobile User Summary

Mobile User Summary

Company / Customer Name: Site Name 4

Site Ref 4

Billing Period: 30/11/2023

Due to rounding it is possible that low Data Usage is being displayed as zero, and therefore may slightly differ from the actual value.

Billing ID	User Name	Billing ID Type	Data Usage (GB)	Mins Usage	Texts	Service Charges (£)	Out Of Bundle (£)	Total (£)
07394222222	User A	Mobile	0.7602	123	4	0.00	44.74	44.74
07394234567	User B	Mobile	3.2607	69	25	0.00	188.63	188.63
07791234567	User C	Mobile	0.1278	48	4	0.00	20.02	20.02
07792345678	User D	Mobile	0.0675	16	0	0.00	0.11	0.11
07793456789	User E	Mobile	0.0518	1	0	0.00	0.55	0.55
07794567890	User F	Mobile	0.0110	141	16	0.00	18.64	18.64
Total			4.2790	398	49	0.00	272.69	272.69

	A	B	C	D	E	F	G	H	I	J
1	Billing ID	User Name	Billing ID Type	Data Usage (GB)	Mins Usage	Texts	Service Charges (£)	Out Of Bundle (£)	Total (£)	
2	07394222222	User A	Mobile	0.7602	123	4	0	44.74	44.74	
3	07394234567	User B	Mobile	3.2607	69	25	0	188.63	188.63	
4	07791234567	User C	Mobile	0.1278	48	4	0	20.02	20.02	
5	07792345678	User D	Mobile	0.0675	16	0	0	0.11	0.11	
6	07793456789	User E	Mobile	0.0518	1	0	0	0.55	0.55	
7	07794567890	User F	Mobile	0.011	141	16	0	18.64	18.64	
8										
9										
10										
11										

Site Spend Report

Site Spend Report

Company / Customer Name: Site Name 4

Site Ref 4

Billing Period: 30/11/2023

Site Ref.	Calls	Duration (Min)	Text Messages	Usage (GB)	Call Charges (£)	Service Charges (£)	Total (£)
Site Ref 4	159	398	49	4.2792	272.6867	0.0000	272.6867
Total	159	398	49	4.2792	272.6867	0.0000	272.6867

	A	B	C	D	E	F	G	H	I
1	Site Ref.	Calls	Duration (Min)	Text Messages	Usage (GB)	Call Charges (£)	Service Charges (£)	Total (£)	
2	Site Ref 4	159	398	49	4.2792	272.6867	0	272.6867	
3									
4									
5									
6									
7									
8									

6. Bundle Usage

The Bundle Usage tab provides a view of bundle usage for the current Billing Period, with breakdowns at both account (site) level and individual Billing ID level.

The page initially shows data for the first available site. Use the Site dropdown menu at the top left of the page to switch to a different site.

Bundle Usage

Bundles and Bundle Usage

1 MY PER SITE INCLUSIVE PLAN

- 100/100 100 MINUTES MINUTES PER SITE
- 200/500 500 CALLS CALLS PER SITE
- 100/1000 1000 GB GB PER SITE

site Site Ref 4

2

NUMBER	USER / DEPARTMENT	DESCRIPTION	COST CENTRE	BUNDLES
073942123456	User A, Department A	My UK Data Allowance	Cost Centre A	DATA UK DATA
073942123456	User A, Department A	MY ROW Data Allowance	Cost Centre A	DATA ROW DATA
07394234567	User B, Department B	My UK Data Allowance	Cost Centre B	DATA UK DATA
07394234567	User B, Department B	MY ROW Data Allowance	Cost Centre B	DATA ROW DATA
07391234567	User C, Department C	My UK Data Allowance	Cost Centre C	DATA UK DATA
07391234567	User C, Department C	MY ROW Data Allowance	Cost Centre C	DATA ROW DATA
07392345678	User D, Department D	My UK Data Allowance	Cost Centre D	DATA UK DATA
07392345678	User D, Department D	MY ROW Data Allowance	Cost Centre D	DATA ROW DATA
07393456789	User E, Department E	My UK Data Allowance	Cost Centre E	DATA UK DATA
07393456789	User E, Department E	MY ROW Data Allowance	Cost Centre E	DATA ROW DATA

Showing 1 to 10 of 12 entries

Previous 1 2 Next

6.1 Per Site Bundles and Usage

The overview presents bundle plan information for the selected site, including:

- Minutes per Site
- Calls per Site
- GB per Site (Data)

Note: This overview only includes usage from plans not allocated to a specific Billing ID.

1 MY PER SITE INCLUSIVE PLAN

- 100/100 100 MINUTES MINUTES PER SITE
- 200/500 500 CALLS CALLS PER SITE
- 100/1000 1000 GB GB PER SITE

Showing 10 of 12 entries

2

Search:

NUMBER	USER / DEPARTMENT	DESCRIPTION	COST CENTRE	BUNDLES
07394123456	User A, Department A	My UK Data Allowance	Cost Centre A	DATA UK DATA
07394123456	User A, Department A	MY ROW Data Allowance	Cost Centre A	DATA ROW DATA
07394234567	User B, Department B	My UK Data Allowance	Cost Centre B	DATA UK DATA
07394234567	User B, Department B	MY ROW Data Allowance	Cost Centre B	DATA ROW DATA
07791234567	User C, Department C	My UK Data Allowance	Cost Centre C	DATA UK DATA
07791234567	User C, Department C	MY ROW Data Allowance	Cost Centre C	DATA ROW DATA
07792345678	User D, Department D	My UK Data Allowance	Cost Centre D	DATA UK DATA
07792345678	User D, Department D	MY ROW Data Allowance	Cost Centre D	DATA ROW DATA
07793456789	User E, Department E	My UK Data Allowance	Cost Centre E	DATA UK DATA
07793456789	User E, Department E	MY ROW Data Allowance	Cost Centre E	DATA ROW DATA

Previous **1** **2** Next

6.2 Billing ID Level Bundle Usage

This table shows usage from plans assigned to specific Billing IDs.

Showing 10 of 12 entries

2

Search:

NUMBER	USER / DEPARTMENT	DESCRIPTION	COST CENTRE	BUNDLES
07394123456	User A, Department A	My UK Data Allowance	Cost Centre A	DATA UK DATA
07394123456	User A, Department A	MY ROW Data Allowance	Cost Centre A	DATA ROW DATA
07394234567	User B, Department B	My UK Data Allowance	Cost Centre B	DATA UK DATA
07394234567	User B, Department B	MY ROW Data Allowance	Cost Centre B	DATA ROW DATA
07791234567	User C, Department C	My UK Data Allowance	Cost Centre C	DATA UK DATA
07791234567	User C, Department C	MY ROW Data Allowance	Cost Centre C	DATA ROW DATA
07792345678	User D, Department D	My UK Data Allowance	Cost Centre D	DATA UK DATA
07792345678	User D, Department D	MY ROW Data Allowance	Cost Centre D	DATA ROW DATA
07793456789	User E, Department E	My UK Data Allowance	Cost Centre E	DATA UK DATA
07793456789	User E, Department E	MY ROW Data Allowance	Cost Centre E	DATA ROW DATA

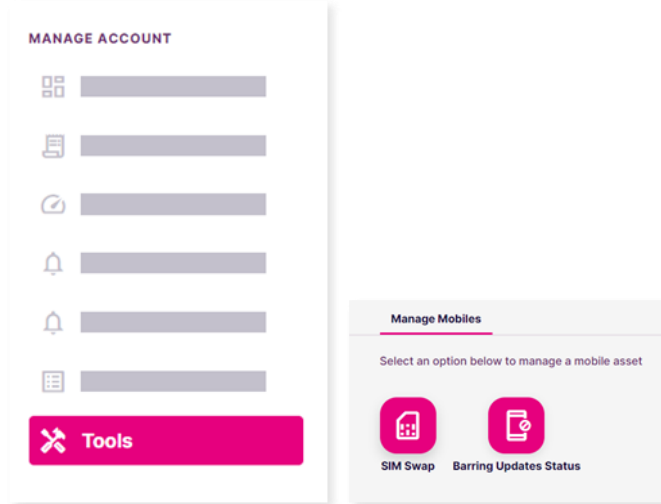
Previous **1** **2** Next

Field	Details
Number	The Billing ID (or Presentation Alias) registered against the selected site.
User / Department	The user or department assigned to the Billing ID.
Description	The description from the related Inclusive Plan.
Cost Centre	The cost centre set against the Billing ID.
Bundles	Shows Used Amount vs Available Amount. Colour indicates usage level. Hover over the tooltip for exact figures. Numbers in multiple plans appear in separate rows for each plan.

Data is ordered from highest to lowest bundle usage. Click a column header to reorder. Results show 10 items per page. Use the Search field to filter by any column value.

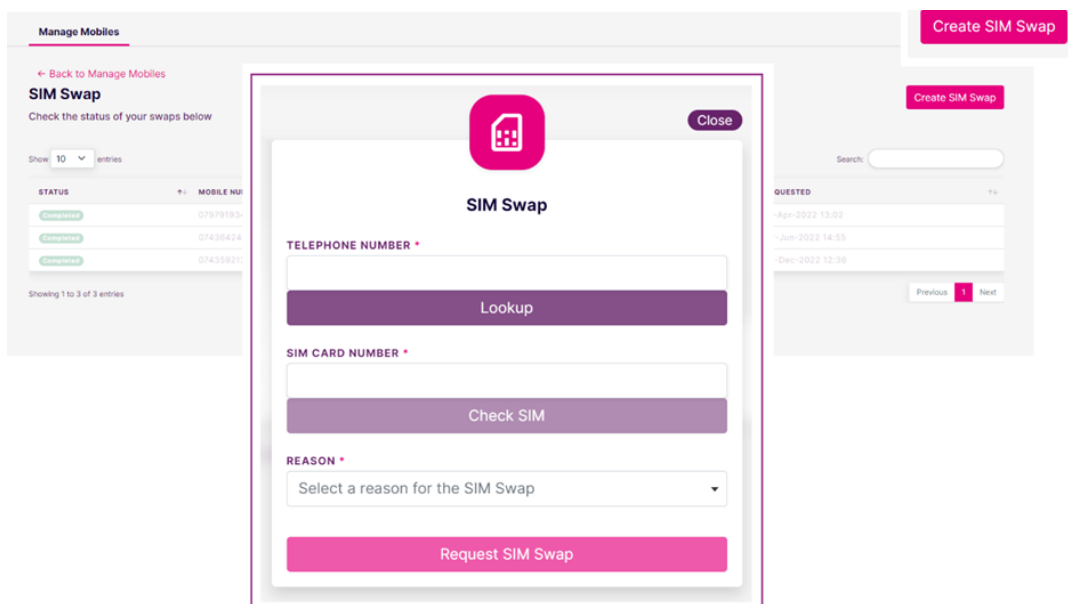
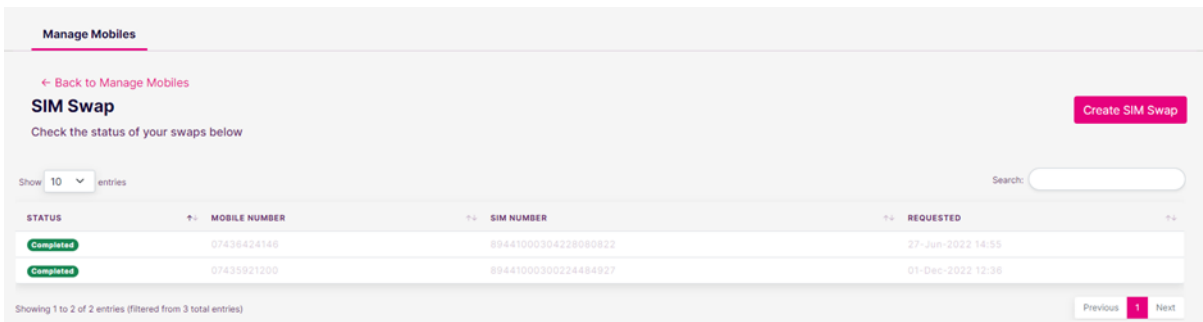
8. Tools — Manage Mobiles

Selecting Tools from the main menu allows you to view and manage mobile assets. This includes SIM Swaps and Call Barring.

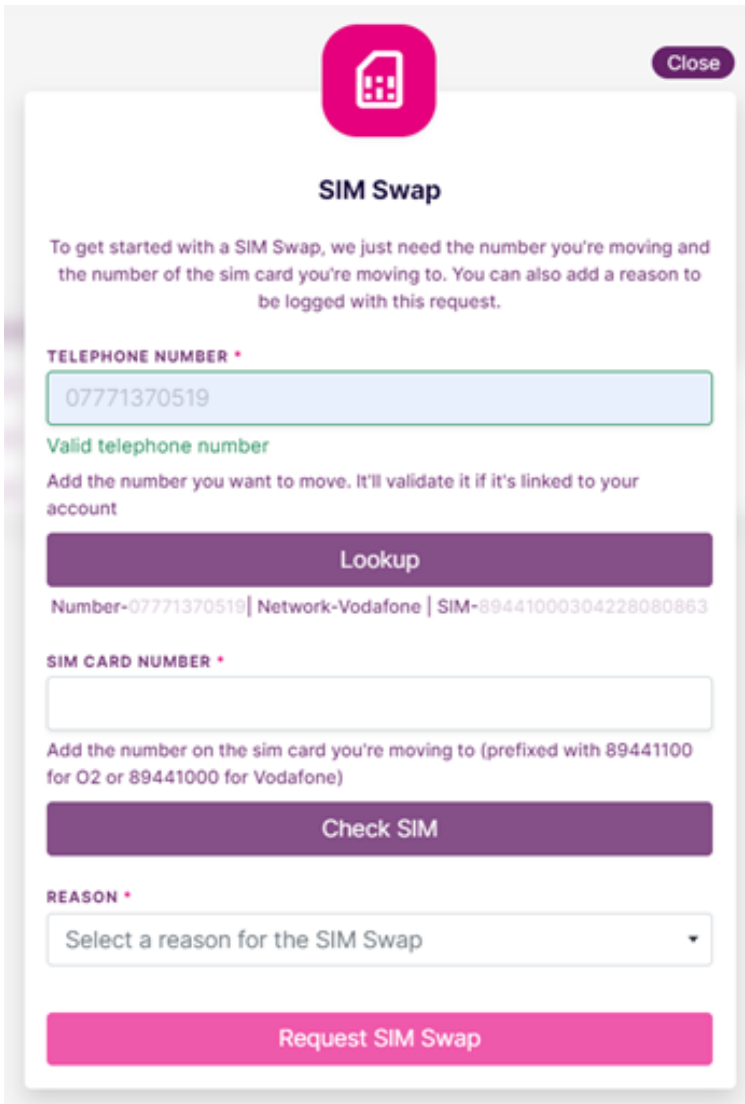


8.1 SIM Swap

Use this page to place SIM Swap orders and monitor their status.



1. Click Create SIM Swap (top right of the page).
2. Enter the telephone number you wish to move and click Lookup. The network details and current SIM number will be displayed if the number is found on your account.
3. Enter the new SIM Card Number. Ensure it is linked to the correct network.
4. Click Check SIM to validate the new SIM Card Number.
5. Select the appropriate Reason for the swap.
6. Click Request SIM Swap to submit the order.



The screenshot shows a 'SIM Swap' form with a pink header and a 'Close' button in the top right. The form contains the following fields and buttons:

- TELEPHONE NUMBER ***: A text input field containing '07771370519'. Below it, a green message reads 'Valid telephone number'. A sub-note says 'Add the number you want to move. It'll validate it if it's linked to your account'.
- Lookup**: A purple button.
- Feedback text: 'Number-07771370519 | Network-Vodafone | SIM-89441000304228080863'.
- SIM CARD NUMBER ***: An empty text input field.
- Sub-note: 'Add the number on the sim card you're moving to (prefixed with 89441100 for O2 or 89441000 for Vodafone)'.
- Check SIM**: A purple button.
- REASON ***: A dropdown menu with the text 'Select a reason for the SIM Swap'.
- Request SIM Swap**: A large pink button at the bottom.

The order will appear as Processing in the SIM Swap grid, allowing you to monitor its status.

8.2 Call Barring

Use this page to add or remove call bars on mobile numbers.

Manage Mobiles

[← Back to Manage Mobiles](#)

Barring Updates Status [Manage Mobile Bars](#)

Show entries Search:

STATUS	MOBILE NUMBER	SIM NUMBER	REQUESTED
Completed	07592024715		11-Apr-2022 11:30
Completed	07355035012		19-Apr-2022 13:52
Completed	07355035012		28-Apr-2022 10:34
Completed	07355035012		28-Apr-2022 11:31
Completed	07592024715		03-May-2022 09:17
Completed	07355035012		03-May-2022 10:56
Completed	07796695330		17-May-2023 17:00
Completed	07355035012		03-May-2022 13:45
Completed	07796695330		28-Jun-2022 12:07
Completed	07436424146		02-Sep-2022 12:36

Showing 1 to 10 of 19 entries Previous **1** 2 Next

1. Click Manage Mobile Bars (top right of the page).
2. Enter the mobile number and click Lookup. Network and SIM details will appear if the number is linked to your account.
3. Enable or disable the applicable bars.
4. Click Submit Changes to create the order.

Manage Mobiles [Manage Mobile Bars](#)

[← Back to Manage Mobiles](#)

Barring Updates Status [Manage Mobile Bars](#)

Show entries Search:

STATUS	MOBILE NUMBER	SIM NUMBER	REQUESTED
Completed			
Completed			
Completed			
Completed			
Completed			
Completed			
Completed			
Completed			
Completed			
Completed			

Showing 1 to 10 of 19 ent **1** 2 Next

Add/Remove Bars [Close](#)

MOBILE NUMBER *

Enter the mobile number you want to change, then click on Lookup

Lookup

Submit Changes

Add/Remove Bars

To get started with a Call barring, we just need the number and the bars.

MOBILE NUMBER *

07771370519

Valid mobile number

Enter the mobile number you want to change, then click on Lookup

Lookup

Number-07771370519 | Network-Vodafone | SIM-39441000304228080863

ADD/REMOVE BARS

The bars to enable/disable

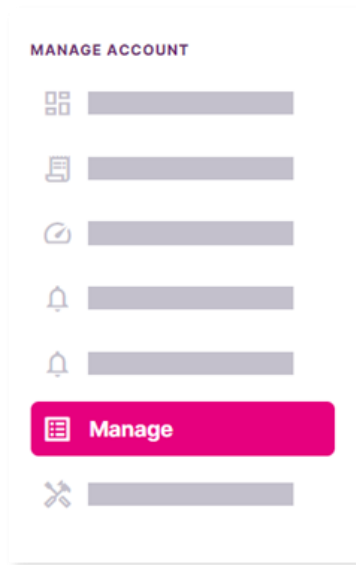
<input type="checkbox"/> ADMIN	<input type="checkbox"/> INCOMING ROAMING
<input type="checkbox"/> STOLEN	<input checked="" type="checkbox"/> PREMIUM TEXT
<input type="checkbox"/> GPRS	<input type="checkbox"/> GPRS ROAMING
<input type="checkbox"/> INCOMING CALLS	<input type="checkbox"/> COMBINED SMS BAR
<input type="checkbox"/> INCOMING SMS	<input type="checkbox"/> ALL CALL BARS DUE TO SIM CANCELLATION
<input type="checkbox"/> INTERNATIONAL AND PREMIUM RATE	<input type="checkbox"/> INTERNATIONAL OUTGOING CALLS
<input type="checkbox"/> PREMIUM CALLS	<input type="checkbox"/> OUTGOING SMS
<input type="checkbox"/> OUTGOING MMS	<input type="checkbox"/> INCOMING MMS
<input type="checkbox"/> OUTGOING ROAMING	<input type="checkbox"/> OUTGOING CALLS
<input type="checkbox"/> INTERNATIONAL ROAMING	<input type="checkbox"/> MPAY BAR

Submit Changes

The order will appear as Processing in the Barring Updates Status grid.

9. Manage

The Manage section lets you view and edit telephone numbers, users, cost centres, and departments associated with your account.



9.1 Numbers

All telephone numbers registered to your account are listed in the Numbers page under Manage.

Numbers Users Cost Centres Departments

Telephone Numbers Export to CSV

Show entries Search:

TELEPHONE NUMBER	USER NAME / DEPARTMENT	DESCRIPTION	BILLING ID TYPE	SITE REF.	COST CENTRE 1	COST CENTRE 2	COST CENTRE 3
013057		A new value		AL001			
013223		Alerts Setup		AL001	Sales Dept		
013224		Alerts Setup		AL001	Sales Dept		
013331		Alerts Setup		AL001			
012023		Alerts Setup	PSTN	AL001	Sales Dept		
012023		PSTN	PSTN	AL001			
012023		PSTN	PSTN	AL001			
012345		A new value		AL001			
013057				AL001			
013057				AL001			

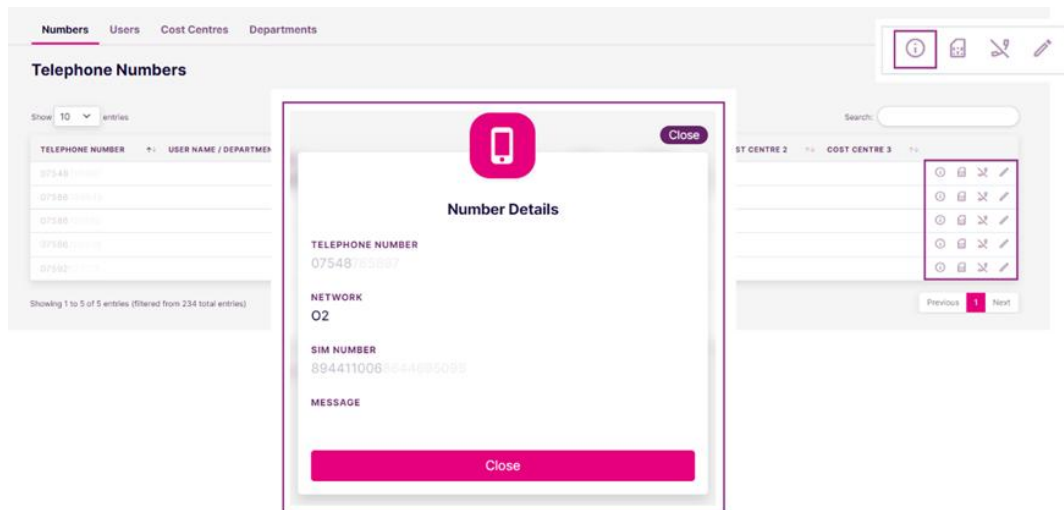
Showing 1 to 10 of 234 entries Previous 1 2 3 4 5 ... 24 Next

The table includes the related Username/Department, Cost Centre, and Description. From this page you can assign Usernames, Cost Centres, and Departments to Billing IDs, view number details, and manage mobile assets.

The Numbers tab has the same filter capability, column chooser, saved views, and download functionality as the Charge Breakdown tab. Refer to Section 4.2 for detailed instructions.

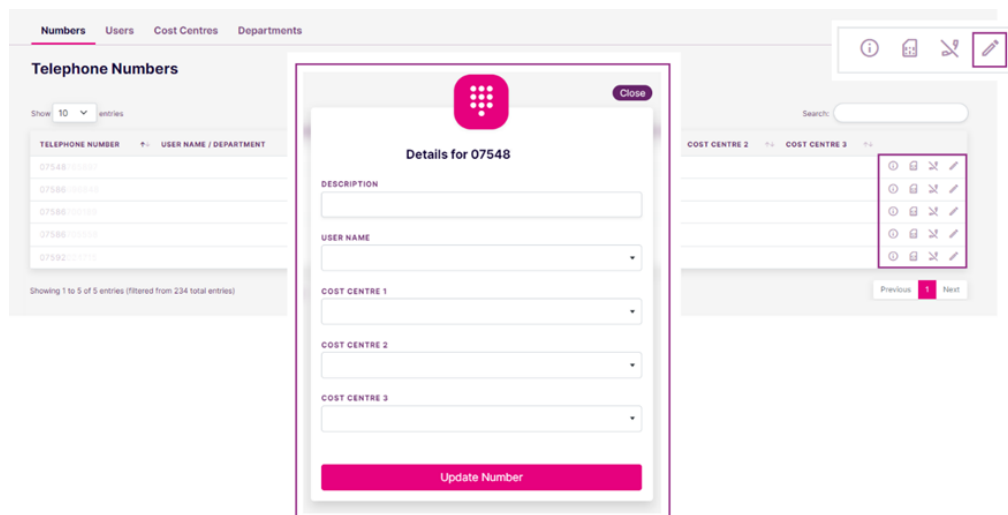
Number Details

Click on View Details to view a summary of the telephone number, including network details and SIM number.



Editing a Number

Click Edit to open the Details window. Update the Description, Username, and Cost Centre(s) as required, then save.



Note: If a department has been allocated to a username, it will appear in the main Numbers grid under the username / department field.

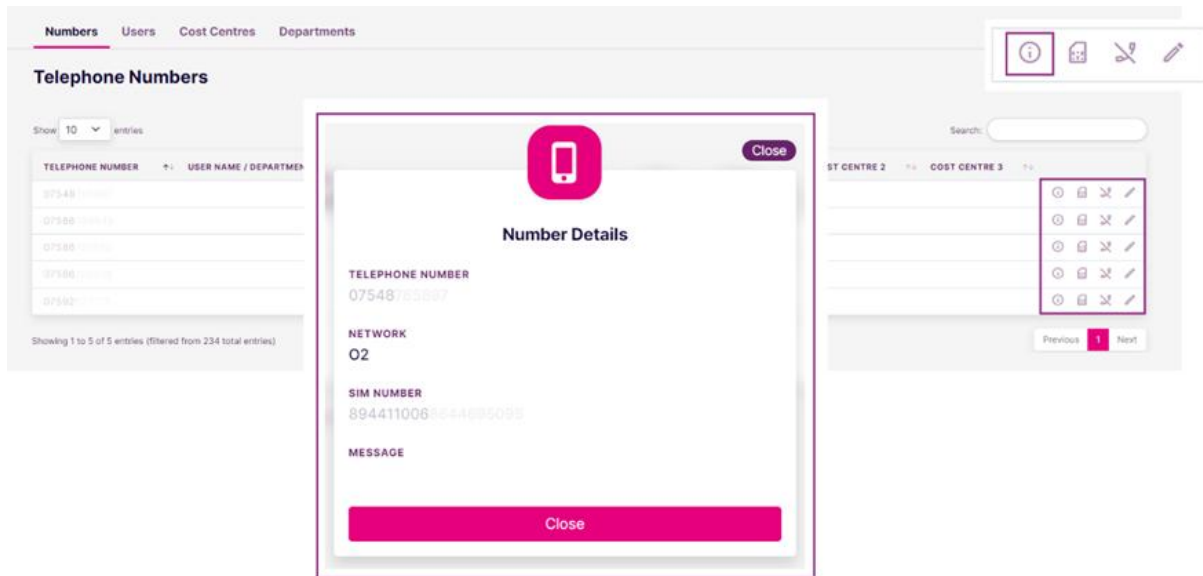
Changes can also be performed in bulk by:

1. Selecting Bulk Update at the top of the table
2. Clicking download template to download an editable template

3. Populating the template
4. Uploading the populated template by clicking Upload File
5. Submitting the changes by clicking Apply Updates

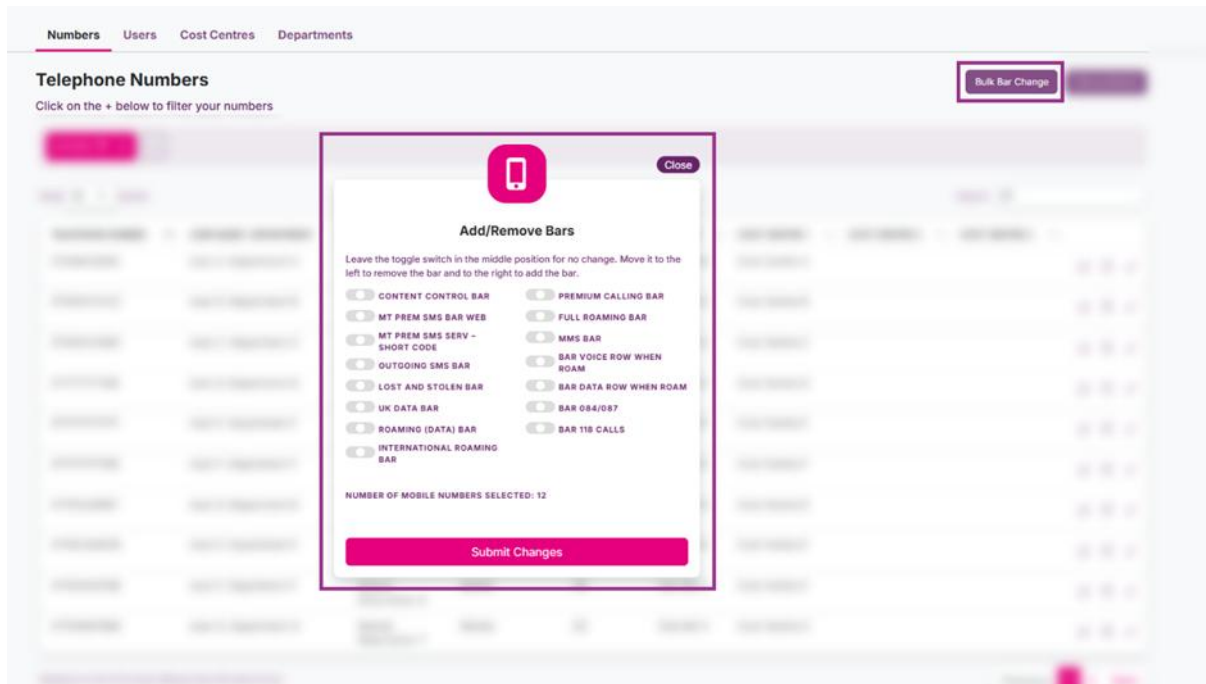
SIM Swap from Numbers

Click on SIM Swap alongside a number to open the SIM Swap window with the telephone number pre-populated. Complete the process as described in Section 8.1.



Add / Remove Bars from Numbers

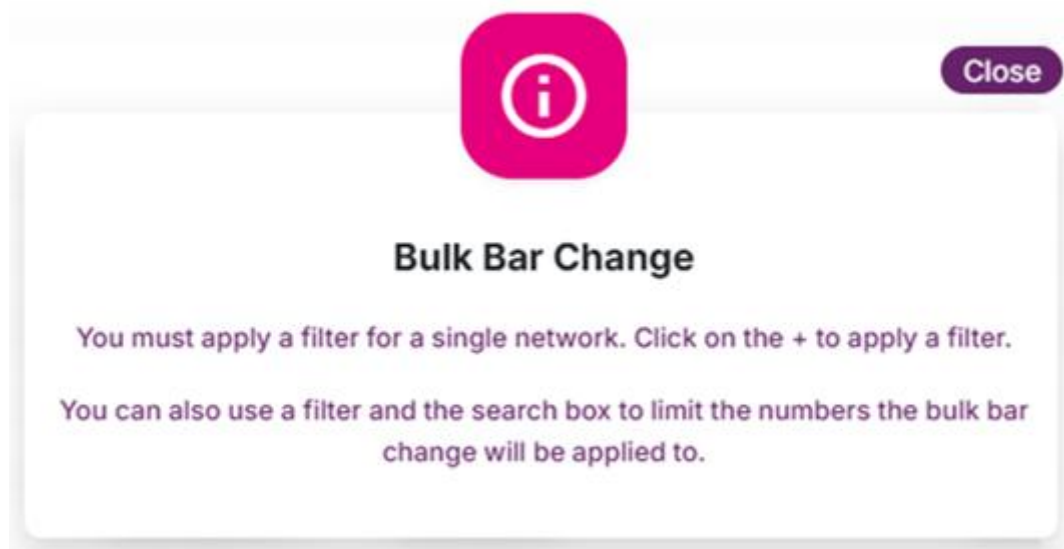
Click Call Barring icon to open the barring window directly from the Numbers page. The mobile number is pre-populated.



Bulk Bar Change

To apply call bar changes to multiple numbers simultaneously:

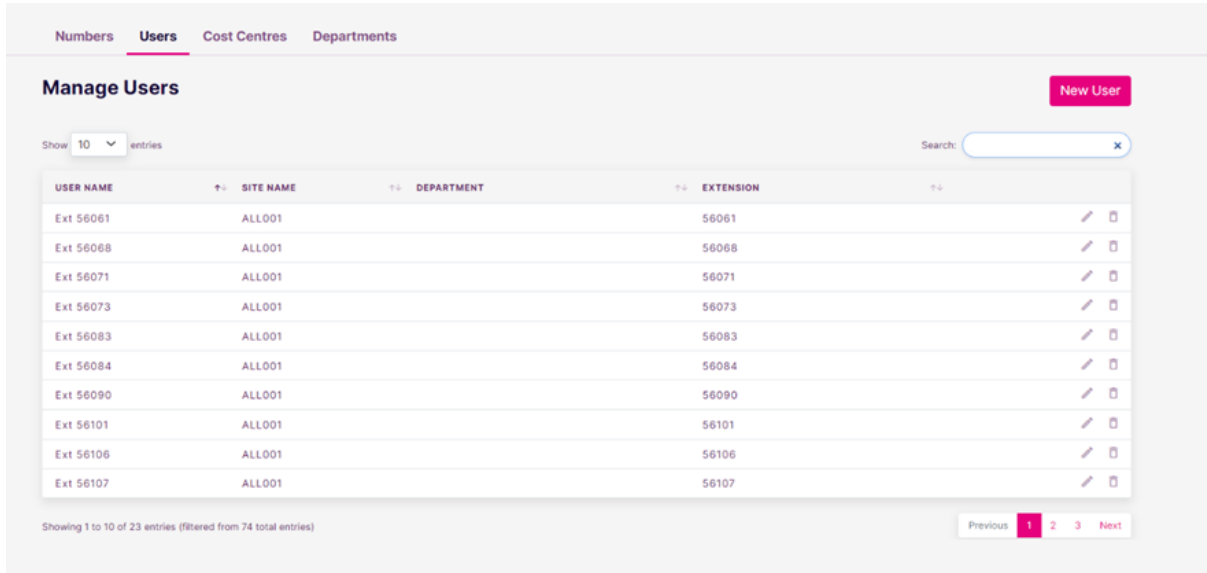
1. Use the filter options to select a single network.
2. Click Bulk Bar Change.
3. Enable or disable bars as required, then click Submit Changes.



Note: A message will appear if you have not filtered to a single network before attempting a Bulk Bar Change.

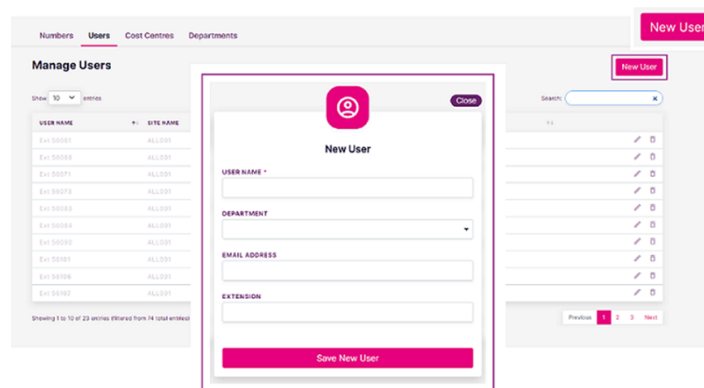
9.2 Users

Manage the Usernames associated with your Billing IDs under Manage > Users. The page lists all existing Usernames with their associated Site Name, Department, and Extension.



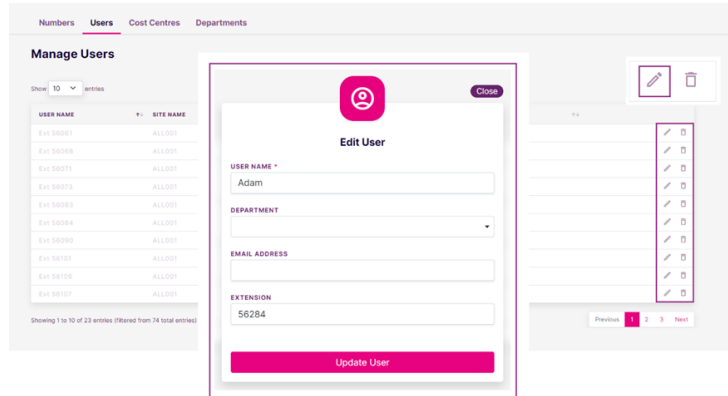
Adding a New User

Click New User and complete the details: Username, Department (optional), Email Address, and Extension (optional). You can select an existing department from the dropdown. Click Save New User.



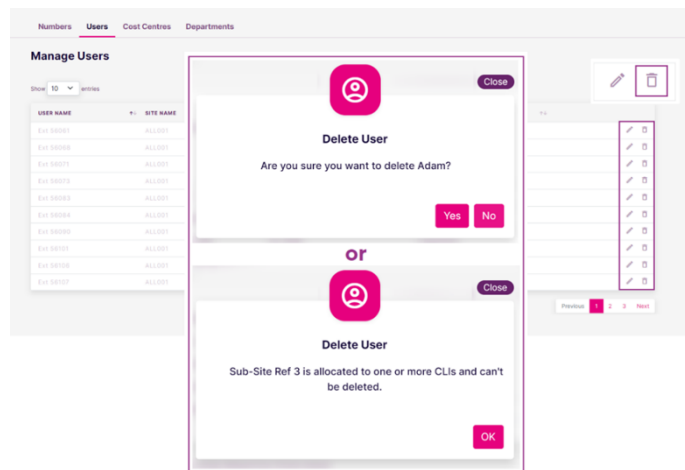
Editing a User

Click the Edit icon alongside the user entry. Make your changes and click Update User.



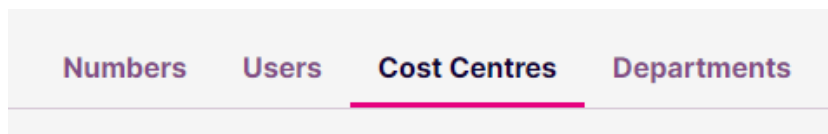
Deleting a User

Click the Delete icon alongside the user entry and select Yes.



9.3 Cost Centres

Manage cost centres under Manage > Cost Centres.

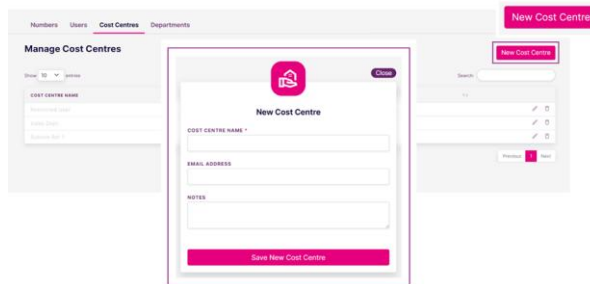


Note: Usernames assigned to one or more Billing IDs (CLIs) cannot be deleted.

The page lists all existing cost centre names with their associated Email Address and Notes.

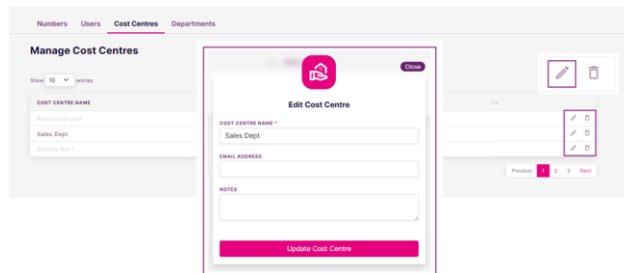
Adding a New Cost Centre

Click New Cost Centre. Enter a Cost Centre Name, an associated Email Address (optional), and Notes (optional). Click Save New Cost Centre.



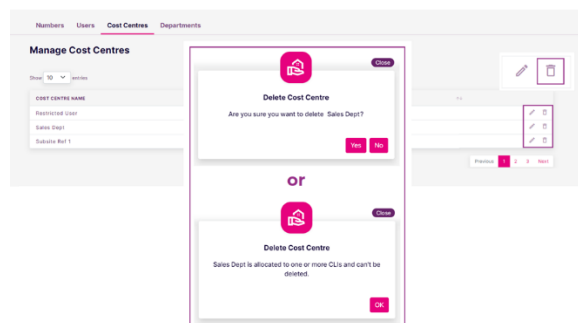
Editing a Cost Centre

Click the Edit icon alongside the cost centre. Make your changes and click Update Cost Centre.



Deleting a Cost Centre

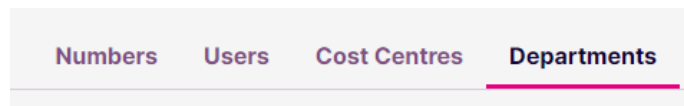
Click the Delete icon and select Yes.



Note: Cost Centres assigned to one or more Billing IDs cannot be deleted.

9.4 Departments

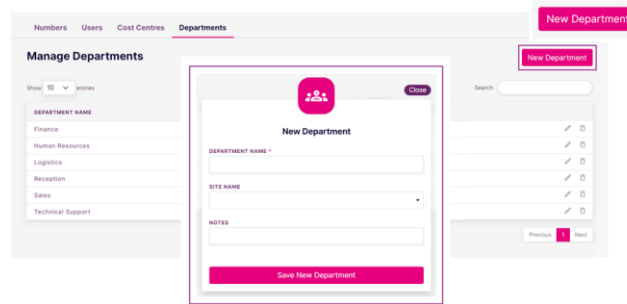
Manage departments under Manage > Departments.



The page lists all existing department names with any associated Notes.

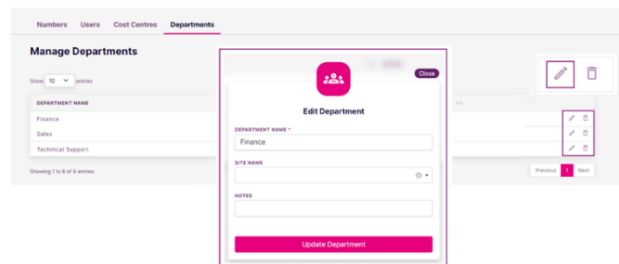
Adding a New Department

Click New Department. Enter a Department Name, associated Site Name, and Notes (optional). Click Save New Department.



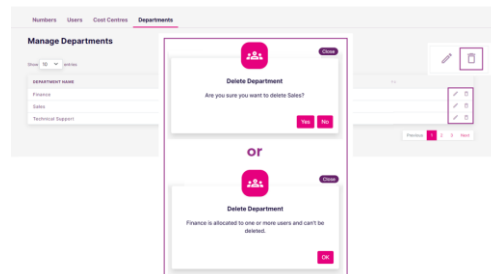
Editing a Department

Click the Edit icon alongside the department. Make your changes and click Update Department.



Deleting a Department

Click the Delete icon and select Yes.



Note: Departments assigned to one or more users cannot be deleted.

10. Account Details

The Account Details section allows you to view and update your account settings, including your billing address and bill delivery preferences.

For users with the relevant access level, Account Details appears as a menu item in the left-hand navigation.

Manage Account Details

Keep your billing details up to date.

SELECT SITE

Allied Biscuit Ltd

Billing Address

View or update the address that appears on your invoices

Bill Delivery Settings

View or amend bill delivery settings

BILL EMAIL

INVOICE DELIVERY METHOD

Email & Web

10.1 Updating Your Billing Address

1. From the left-hand menu, click Account Details.
2. You will be taken to the Manage Account Details page.
3. If your company has multiple sites, use the Select Site dropdown to choose the correct one.
4. Under Billing Address, your current invoice address is shown.
5. Click Edit Details to make changes.
6. Enter your updated address, then save your changes.

Your invoices will display the new billing address going forward.

Edit Billing Address

BILLING ADDRESS *

TOWN *

COUNTY *

POSTCODE *

Update

10.2 Updating Bill Delivery Settings

1. Navigate to Account Details from the left-hand menu.
2. Scroll to the Bill Delivery Settings section.
3. Here you will see the Bill Email address(es) where invoices are sent, and the Invoice Delivery Method (e.g. Email & Web).

4. Click Edit Details to make changes.
5. Update the email addresses or select a different delivery method.
6. Save your changes.

Edit Billing Settings

BILL EMAIL *

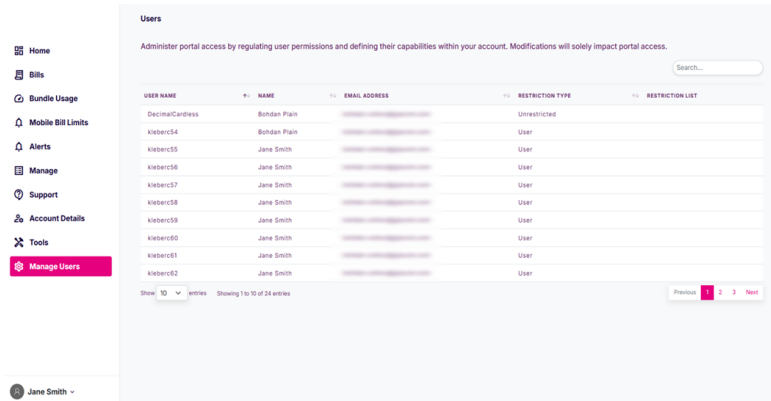
INVOICE DELIVERY METHOD

Email & Web

Update

11. Portal User Administration

The Manage Users section allows administrators to create, edit, and delete portal user accounts, as well as control access levels and enabled features.



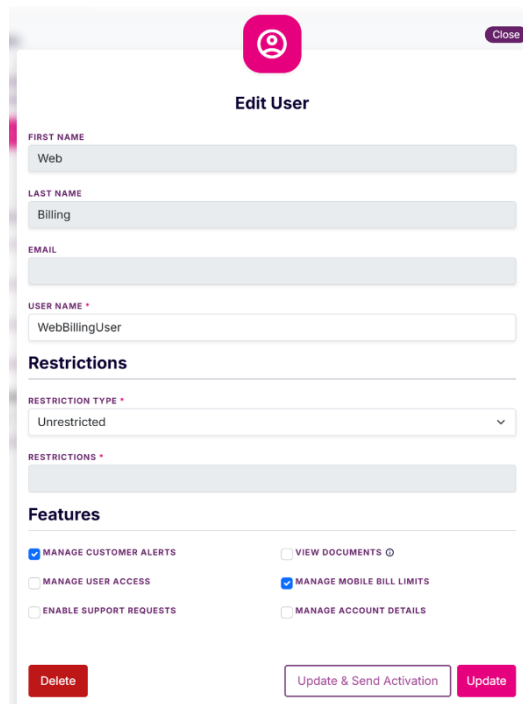
It can be accessed by clicking Manage Users on the left hand menu.

11.1 Editing an Existing User

Users with the appropriate permission can update user details, access restrictions, and feature access.

1. Click on edit icon against a user from the list.
2. Update the required details or permissions.
3. Click Save.

Changes apply immediately.



Editable fields include:

- User details: name, email, username
- Restrictions: e.g. cost centre, access limits
- Feature access: alerts, mobile bill limits, account details, documents

11.3 Adding a New User

Administrators can add new portal users in a single workflow.

1. Click Add User.
2. Enter the required details: First Name, Last Name, Email, Username, Primary Site.
3. Select the appropriate Restriction Type.
4. Enable the required features.
5. Click Save.

The new user is immediately added to the portal.

The screenshot shows a modal window titled "Add user" with a "Close" button in the top right corner. The form contains the following fields and sections:

- CONTACT**: A dropdown menu with "Select an item..." as the placeholder.
- FIRST NAME**: A text input field with a red asterisk indicating it is required.
- LAST NAME**: A text input field with a red asterisk indicating it is required.
- EMAIL**: A text input field with a red asterisk indicating it is required.
- USER NAME**: A text input field with a red asterisk indicating it is required.
- PRIMARY SITE**: A dropdown menu with "Select an item..." as the placeholder.
- Restrictions**: A section header followed by:
 - RESTRICTION TYPE**: A dropdown menu with "Unrestricted" selected and a red asterisk indicating it is required.
 - RESTRICTIONS**: A dropdown menu with "Select an item..." as the placeholder.
- Features**: A section header followed by a grid of checkboxes:
 - MANAGE CUSTOMER ALERTS
 - VIEW DOCUMENTS
 - MANAGE USER ACCESS
 - MANAGE MOBILE BILL LIMITS
 - ENABLE SUPPORT REQUESTS
 - MANAGE ACCOUNT DETAILS
- Create**: A pink button at the bottom right of the form.