



MASERGY

**Account Codes &
Authorization Codes**
Quick Start Guide

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Account Codes

- Analytics
 - Using account codes enables the tracking of calls made outside the group by prompting users for an account code.
 - Codes are not validated.
 - The account codes can be entered over the phone or using the Masergy Unity Client.

Authorization Codes

- Use to restrict local, long distance, international calls from a particular telephone.

Authorization codes are used to perform authorization of calls made outside the group by prompting users for an authorization code. Calls are not connected unless a valid code is entered.

Should I use Account codes or Authorization Codes?

Account Codes

This service allows the users to assign a code to a call that is related to an account for tracking purposes. For example you have 12 clients. Each one has a 2-digit account codes. For example 10-21. You can run reports and bill back to these clients each billing period.

Also, you can set each user to Mandatory or Voluntary. (See Below for details.)

- Use to track billable calls.
- Run reports at the end of the billing cycle easily with Call

Mandatory Account Codes Description

Users assigned the mandatory Account Codes service are prompted to enter an account code every time they make a call outside of the group. When prompted to enter a code, the user dials the applicable digit string, after which the call resumes normally. The code is captured in the Call Analytics.

- Emergency and repair calls (911 & 611) are never prompted for an account code.

Voluntary Account Codes

When this feature is assigned the user can do any of these things (See below for detailed instructions):

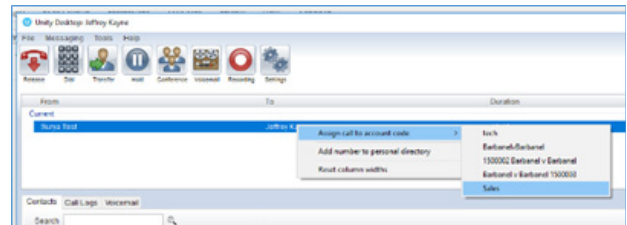
- Make a call as usual, without entering an account code.
- Use Account Codes on the phone
- Use account Codes on the Unity Client

Account Codes on the phone

1. Dial *71 before making a call.
2. Dial the correct account code
3. Dial the phone number

Account Codes with Unity Client

1. Make a call which ever method you like
2. Using the Unity client, Right click on the call.
3. Select the account code that is associated with call you are about make.



Configuration

The group administrator configures the Account Code service through the Group web portal. When configuring the service, the group administrator:

- Activates or deactivates the service.
- Selects the length of the account code.
- Selects whether the service should apply only to long distance calls.
- Selects which users of the group are assigned the service.
- Selects the activation method to be used for each user.

Users can view the Account Code page but cannot modify it.

Authorization Codes

- Use this feature to restrict local, long distance, international calls from a particular telephone.

Authorization codes are used to perform authorization of calls made outside the group by prompting users for an authorization code. Calls are not connected unless a valid code is entered.

One setting available is to allow Local and Toll-Free Calls without Account/Authorization Code. Codes are managed by the administrator. You can assign a different code to each employee or to each department. This keeps unauthorized and unwanted calls without a code. If you have phones in public places this may be useful.

Miscellaneous

As a group, you can use Account Codes or Authorization Codes, but not both. Of course this is an optional feature.

For additional information or training on using this service please contact Masergy Training by sending an email to uctraining@masergy.com.