



My O₂ Business User guide

Contents

Welcome to your My O₂ Business user guide. It's easy to use. Move your mouse over the page to get to the section you want. Click on the links at the top right of the page to get you back. Or the web address at the bottom to take you to the site. Just click and go.

Important: Some functionality found within this user guide may not apply to your role.

Section 1: What is My O₂ Business?

Section 2: Getting started

Section 3: Managing your users

Section 4: Using My O₂ Business

Section 5: Reports

Section 6: Invoices

Section 7: Help

Section 1

What is My O₂ Business?

It's an easy to use online portal that allows you to keep an eye on everything that's going on in your account. See your usage and how much it costs, tag personal and private calls, create reports, bill summaries and more. All from one place. All at your fingertips.

Section 2

Getting started

All you need to know to get up and running with My O₂ Business.

- 2.1** **Signing in**
- 2.2** **Forgotten password**
- 2.3** **Editing your details**
- 2.4** **Registering**

2.1 Signing in

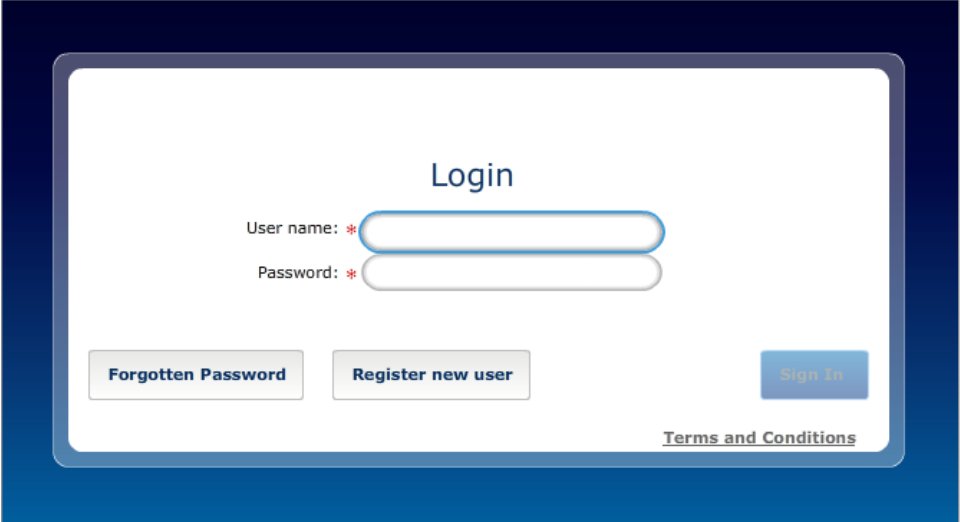
Before signing into My O₂ Business for the first time, please check you've got our emails with your user name and password sent from **myo2business@o2.com**. Your user name will be the email address you used to register with.

How to do it

1. Go to <https://businessonline.o2.co.uk>
2. Enter your user name and password, click **Sign In**. The first time you login you'll need to change your password. Enter your existing password, then your new chosen password, click **Submit**.
3. When your password has been successfully updated, click **OK**.
4. As well as your password, you'll need to choose a security question in case you ever forget your password.
5. Click the drop-down menu to choose your question.
6. Enter your answer, click **Submit**.
7. Your secure login details have been updated so you can start using My O₂ Business, click **OK**.

Important: If you enter your password incorrectly three times, you will be locked out. Talk to an admin user in your organisation or O₂ customer care to reset your account.

We recommend your new password has a minimum of eight characters and include a mix of letters and numbers. Avoid using in order, eg. 123 or ABC.



The screenshot shows a login interface with the following elements:

- Header: Login
- Input fields: User name: * and Password: *
- Buttons: Forgotten Password, Register new user, Sign In
- Link: Terms and Conditions

2.2 Forgotten password

If you forget your password you'll need to reset it.

How to do it

1. Go to <https://businessonline.o2.co.uk>, click **Forgotten Password**.
2. Enter your user name (this will be the email address you used to register), click **Next**.
3. Enter the answer to your security question, click **Submit**.
4. We'll send you an email with your new password. Click **OK**.
5. Enter your user name and the new password we sent you, click **Sign In**.
6. You'll need to change your password the first time you sign in. Enter the password we sent you then your new chosen password, click **Submit**.
7. Your secure login details have been updated, click **OK**.

IMPORTANT: Passwords are case sensitive and if you enter your password incorrectly three times, you will be locked out. Talk to an admin user in your organisation or O₂ customer care to reset your account.

The screenshot shows a login interface with the following elements:

- Title: **Login**
- Input fields: "User name: *" and "Password: *" with corresponding text boxes.
- Buttons: "Forgotten Password", "Register new user", and "Sign In".
- Link: "Terms and Conditions" at the bottom right.

The screenshot shows a "Forgotten Password (1/2)" interface with the following elements:

- Title: **Forgotten Password (1/2)**
- Text: "Enter your username (email address) below:"
- Input field: "Username: *" with a text box.
- Buttons: "Cancel" and "Next".

2.3 Editing your details

You can easily make changes to your personal information and security details.

How to do it

1. Log in.
2. Click **My details**, and make any changes.
3. If you want to change your security details, click **Change security details**, select a new security question, enter your answer, click **Submit**.
4. If you want to change your password, click **Change password** fill in the details and click **Submit**.
5. Click **OK** to update your details.

The screenshot shows a web application window titled "Edit your details". The window is divided into several sections:

- User details:** Contains fields for Title (Mr), Firstname (Mike), Surname (Hall), Username, and a checkbox for "Notify me of new invoice data". There are green checkmarks next to the Title, Firstname, Surname, and Username fields.
- Registered accounts:** A list of accounts with a "Register additional accounts" button below it.
- Security details:** Includes a "Secret question" (What is your mother's maiden name?) and a "Secret answer" (*****). There is a "Change security details" button below.
- Password:** Includes a "Change password" button.
- User role:** Shows "SMB Administrator".

At the bottom of the window, there are "Cancel" and "Submit" buttons. On the right side, there is a "Current accounts:" section with a list of accounts and a "Submit" button at the bottom right.

2.4 Registering

There are two ways to register for My O₂ Business.

If you're an Enterprise customer you'll need to contact your O₂ account manager.

If you're an SMB customer you'll need to click **Register new user** on the login screen and follow the prompts. If you need any help, contact your O₂ account team.

If you don't have your account number or security details, follow the on-screen prompts or contact your O₂ account team.

You can find more about managing users on page 8.

Section 3

Managing your users

How to view and manage your settings and users.

Important: Depending upon your role, you may not have access to all the administration areas.

- 3.1 Welcome page
- 3.2 Searching for an account
- 3.3 Users

3.1 Welcome page

From here you can access all of the My O₂ Business functionality. Depending on your role you may be sent directly to the Account management screen (see page 17).

O₂

My details My reports About O₂ Logout View demo Terms and Conditions

Welcome Account management Reports Invoices Administration Support

Welcome Favourites

My O₂ Business
 Take control of My O₂ Business
Mike Hall

This is where you can analyse, download, and print your invoices, as well as view your recent charges.

[Click for more detail](#)

Recent Charges and Allowances
 Invoices
 Reports
 FAQs

Go to o2.co.uk/myo2business

3.2 Searching for an account

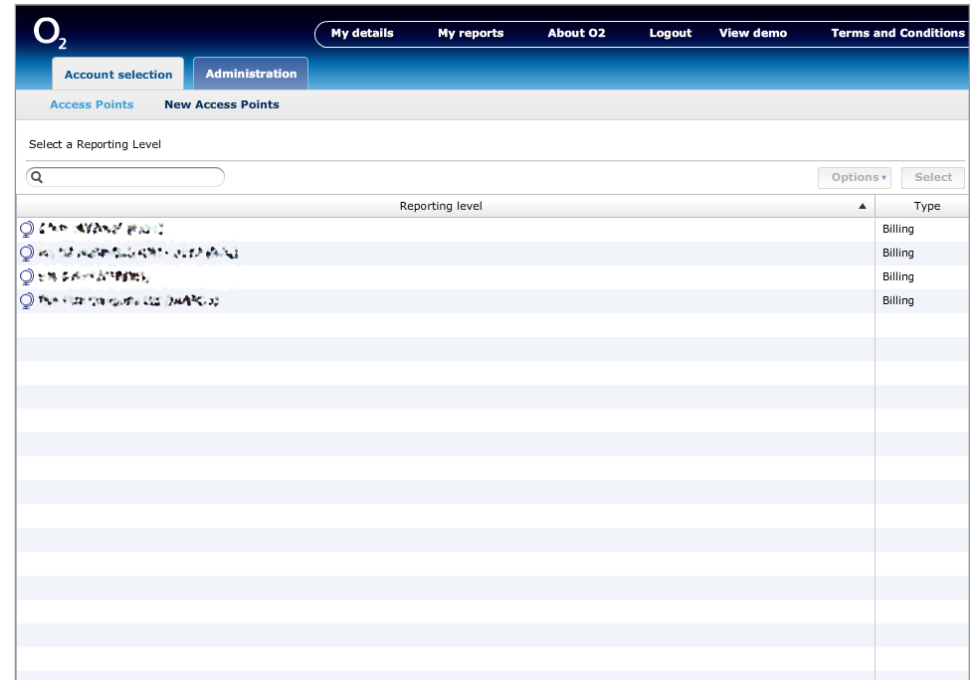
If you have multiple accounts, this is what you'll see. If the account you want doesn't appear, simply search for it.

Those with single accounts will go straight to the Welcome page (page 9).

How to do it

1. Click **Access Points** under **Account selection**.
2. Select the account from the list below and click **Select**.

Typing the name or part of it into the search box will help you find an account. Then simply highlight and click **Select**.

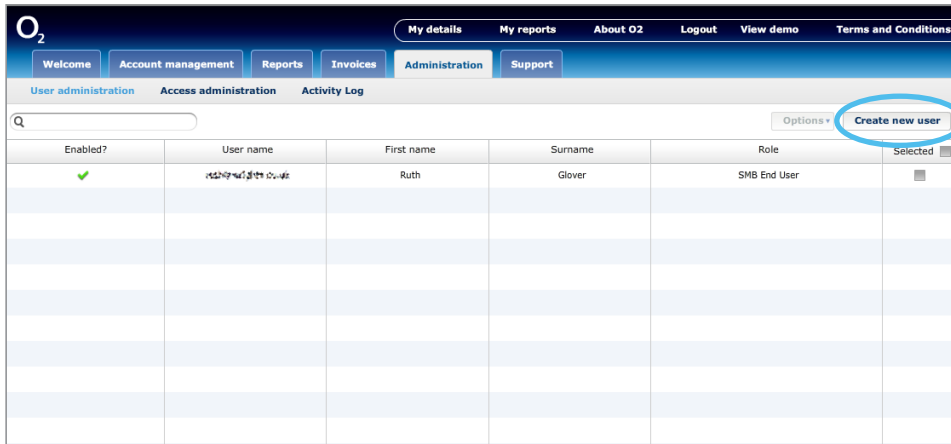


3.3 Users

You can create new users, manage access and look at their activity.

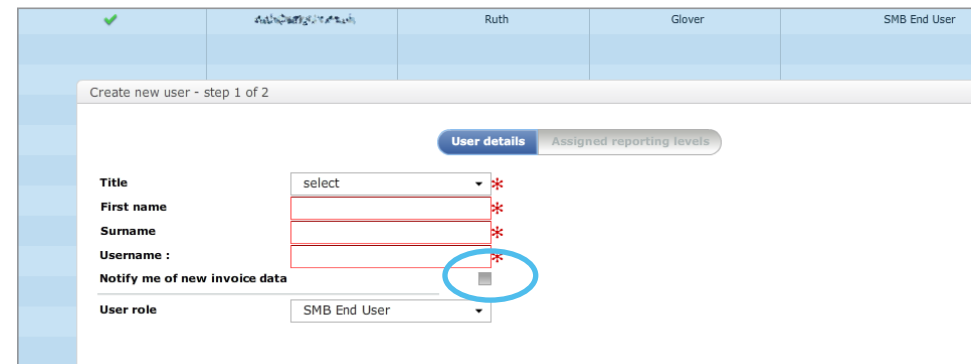
Creating a new user

1. From the main screen click the **Administration** tab.
2. Click **User administration**.
3. Click **Create new user**.



4. Click the **Title** drop-down menu to select the new user's title. Then enter **First name**, **Surname** and **User name** in the correct fields. The user name must be their email address.

5. Click the **User role** drop-down menu and choose a role, click **Next**.
6. If you want to be notified when your latest invoice is ready click the tick box **Notify me of new invoice data**.

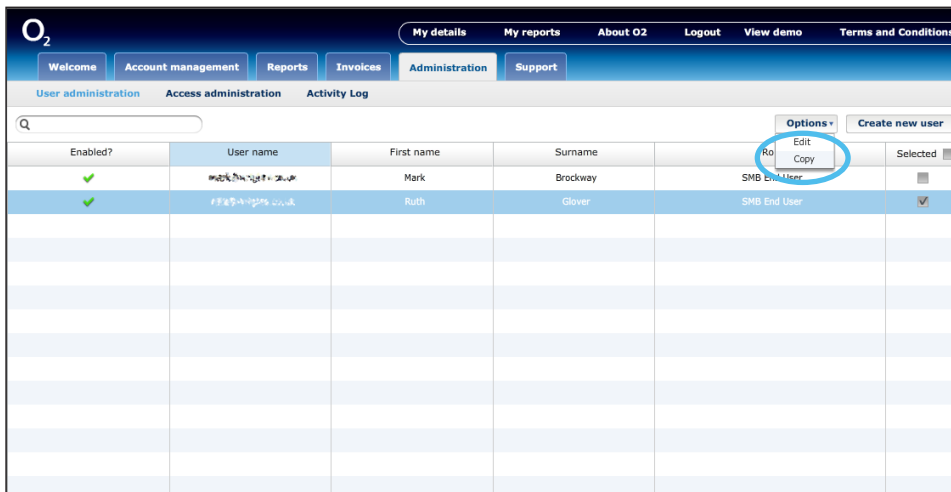


7. On the Assigned reporting levels screen, click **Assign new reporting level**.
8. Select a structure from the **Exploring** drop-down menu.
9. Navigate through the structure to find the level of reporting to assign.
10. Click **Assign role**.
11. Click **Assign reporting level**.
12. Click **Submit**, the new user will receive three emails.

For more information on setting up Reporting structures (see page 30).

Editing a user

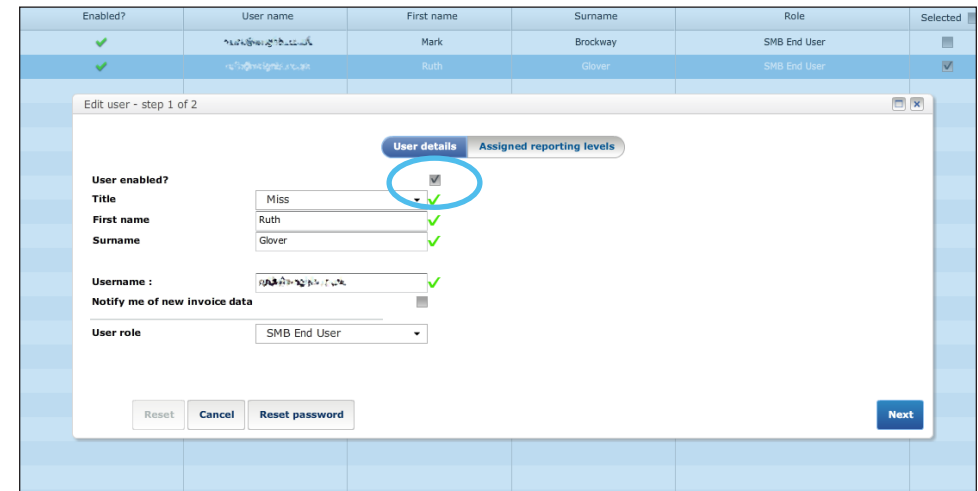
1. From the main screen click the **Administration** tab.
2. Select the user you want to edit.
3. From the **Options** drop-down menu select **Edit**.
4. Follow the on screen prompts.



Stopping user access

You can't delete a user from My O₂ Business, but you can stop their access.

1. From the main screen click the **Administration** tab.
2. Select the user whose access you want to stop.
3. From the **Options** drop-down menu select **Edit**.
4. Untick the box next to **User enabled?**
5. Follow the on screen prompts.



If you want to be notified when your latest invoice is ready click the tick box **Notify me of new invoice data.**

Activity log

An activity log report lets you see what your users have been doing and when. You can report on different types of activities or select everything. And you can download to view yourself or email it to others.

How to do it

1. From the main screen click the **Administration** tab.
2. Click **Activity log**.
3. Choose your report from the **Activity** drop-down menu.
4. Decide your date range in the **Month From** and **Period** drop-down menus.
5. Choose **Email** or **Submit for download** from the **Delivery Option** drop-down.
6. For email add in the delivery addresses.
7. Click **Go**.
8. You can check what's happening with your report by clicking on **My reports**.

When you have your csv file you can easily import into Excel and filter to find specific information.

The screenshot shows the O2 Activity Log Report interface. At the top, there is a navigation bar with tabs for 'Welcome', 'Account management', 'Reports', 'Invoices', 'Administration', and 'Support'. Below this, there is a sub-navigation bar with 'User administration', 'Access administration', and 'Activity Log'. The main content area is titled 'Activity Log Report' and contains several dropdown menus: 'Activity' (set to 'All'), 'Month From' (set to 'June 2012'), 'Period' (set to 'This month only'), 'Format' (set to 'CSV'), and 'Delivery Option' (set to 'Submit for download'). There is also an 'Access Point' dropdown set to 'The Hira Company Ltd (HIRACO)'. A blue 'GO' button is located below the 'Access Point' dropdown.

Section 4

Using My O₂ Business

Everything you need to know.

Important: Depending upon your role, you may not have access to all areas.

- 4.1 Functional Toolbar**
- 4.2 My Favourites**
- 4.3 Managing accounts**
- 4.4 Call tagging**
- 4.5 Address book**
- 4.6 Favourite numbers** (SMB customers only)
- 4.7 SMS messaging** (SMB customers only)

4.1 Functional Toolbar

When you click on some features you'll see the Functional Toolbar. Here's what each button does.



Save and download.



Print the report to file as you see it on screen.




The address book lets you add private and public addresses as well as importing and exporting lists.




View usage as a graph.


Adding names to the address book

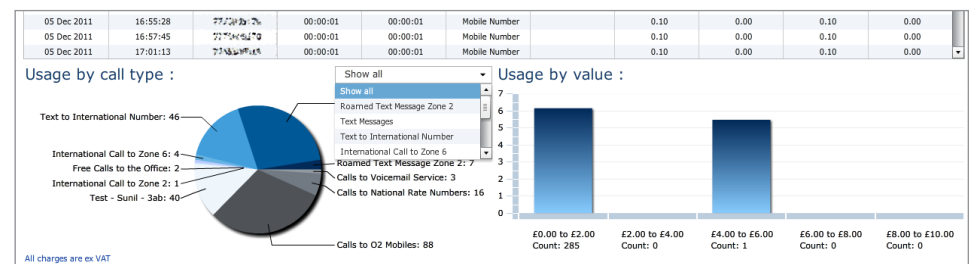
- To add to your address book, click  then click **Create**.
- Enter the number in the **Number dialled** box.
- Enter the description name in the **Description** box.
- Repeat the process to add any more numbers to your address book, click **Save list**.

Importing names in to the address book

- Create a csv file containing two columns with the headers **number** and **description** (see page 24).
- Click  to access the address book.
- Click **Import List**.
- Select the list to import.

Viewing graphics


- Click  to view your information.
- Your information will be shown as a graph and pie chart.
- Click the drop-down menu to view specific information.
- The charts will change automatically.



4.2 My Favourites

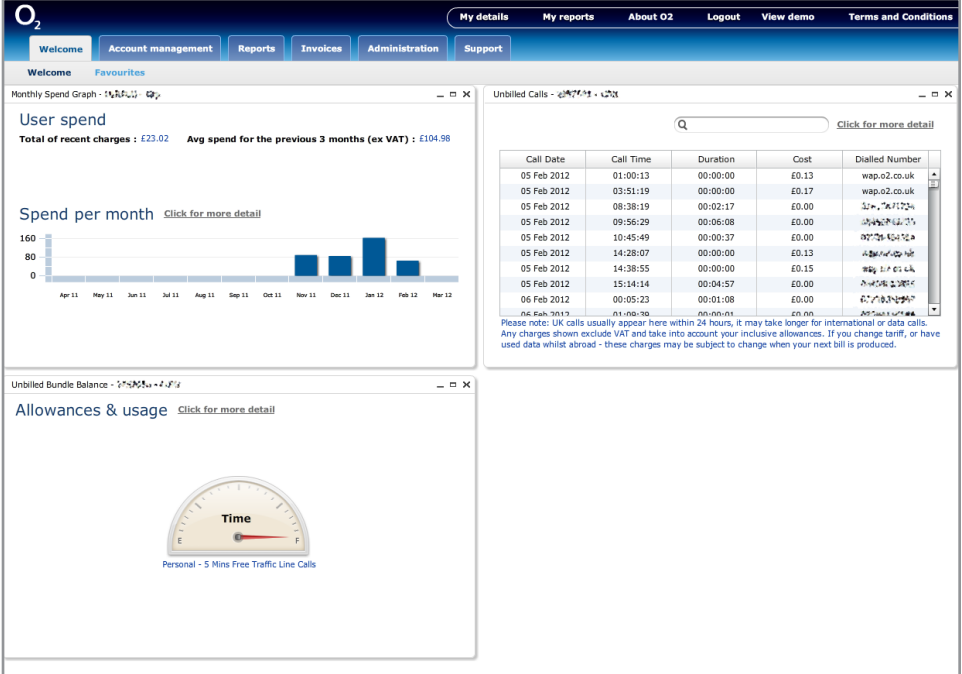
The easy way to keep the reports that are most useful to you close to hand. Click on up to four favourites at any one time.

Adding to Favourites

Simply click  **Add to favourites** when it appears, and it will automatically appear in the **Favourites** page under the **Welcome** tab.

Removing Favourites

Go to the **Favourites** tab, and click the **+** icon in the top right-hand corner of the report you want to remove.



The screenshot shows the O2 My O2 Business interface. At the top, there are navigation tabs: Welcome, Account management, Reports, Invoices, Administration, and Support. Below this, there are several report panels:

- Monthly Spend Graph - User spend:** Shows a bar chart of spend per month from April 2011 to March 2012. Total of recent charges: £23.02. Avg spend for the previous 3 months (ex VAT): £104.98.
- Unbilled Calls:** A table with columns: Call Date, Call Time, Duration, Cost, and Dialed Number. It lists several calls from February 2012.
- Unbilled Bundle Balance - Allowances & usage:** Shows a gauge for 'Time' usage, labeled 'Personal - 5 Mins Free Traffic Line Calls'.

Call Date	Call Time	Duration	Cost	Dialed Number
05 Feb 2012	01:00:13	00:00:00	£0.13	wsp.o2.co.uk
05 Feb 2012	03:51:19	00:00:00	£0.17	wsp.o2.co.uk
05 Feb 2012	08:38:19	00:02:17	£0.00	11-741724
05 Feb 2012	09:56:29	00:06:08	£0.00	077001211
05 Feb 2012	10:45:49	00:00:37	£0.00	077001211
05 Feb 2012	14:28:07	00:00:00	£0.13	077001211
05 Feb 2012	14:38:55	00:00:00	£0.15	077001211
05 Feb 2012	15:14:14	00:04:57	£0.00	077001211
06 Feb 2012	00:05:23	00:01:08	£0.00	077001211

Please note: UK calls usually appear here within 24 hours, it may take longer for international or data calls. Any charges shown exclude VAT and take into account your inclusive allowances. If you change tariff, or have used data whilst abroad - these charges may be subject to change when your next bill is produced.

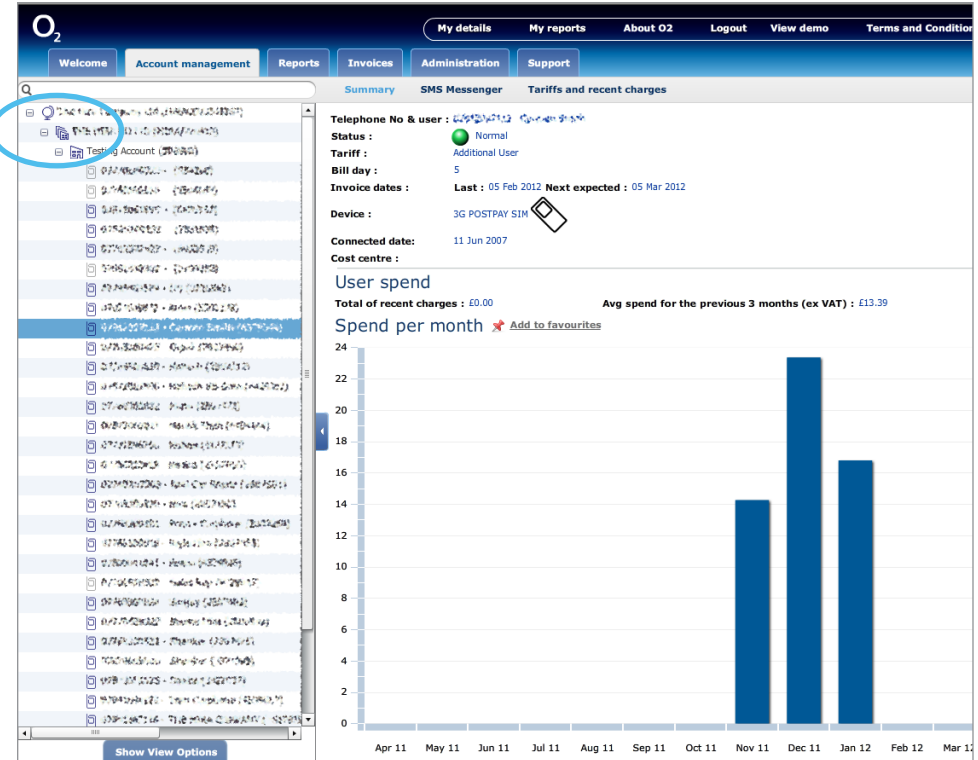
4.3 Managing accounts

Quickly see a summary of your accounts since your last invoice via the Account management menu. Here you can see how much you've spent, recent charges, tariff information not yet invoiced.

Viewing an account - summary

1. From the main screen click the **Account management** tab and click **Summary**.
2. Your **Group account** is at the top of the left hand panel, click your **Group name** to view your group details. Click the **+** symbol to expand your Group account.
3. Click **+** to expand any of your main accounts (if applicable).
4. Click **+** again to expand your accounts (if applicable).
5. Clicking an individual mobile, broadband or landline number, shows its specific details.
6. Alternatively, instead of manually expanding through the account numbers, you can control what you see using the **Show View Options** tab.

If you have access to more than one account or number, you will be given a list. Highlight the one you want and click **Select**.



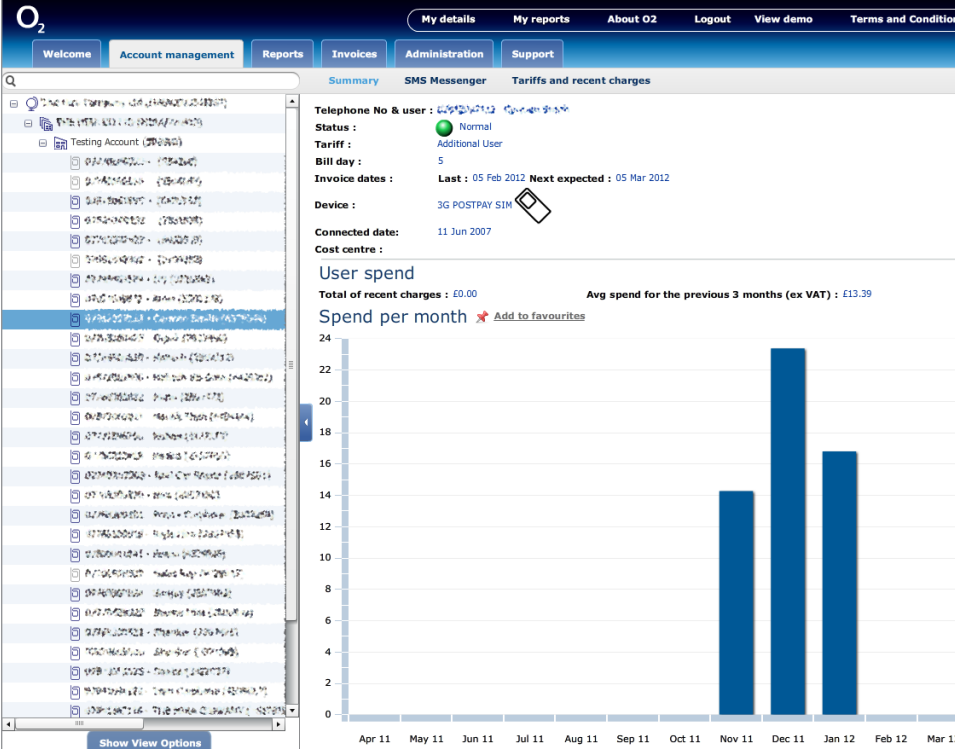
Use the **Show View Options** tab at the bottom of the screen if you want to expand your accounts automatically to find the information you're looking for. Or it can be used to change the information shown on the left screen, eg. hide disconnected numbers.

My O₂ Business icons

On the Account management tab you'll see various icons depending on structure.

- | | | | |
|---|---------------------|---|-----------------------|
|  | Global |  | Switched circuit |
|  | Corporate |  | Fiberlink |
|  | Account level |  | O ₂ Health |
|  | Mobile |  | Hardware |
|  | Landline |  | Account tree |
|  | Broadband |  | Lock |
|  | Telemarketing (NGN) |  | Airtime & hardware |
|  | Managed WAN | | |

Disconnections are shown as greyed out icons.



The screenshot shows the 'Account management' tab in the My O₂ Business portal. On the left is a search bar and a list of account entries, some of which are greyed out. On the right, detailed information for a selected account is displayed, including telephone number, status, tariff, and device. Below this is a 'User spend' section with a bar chart showing monthly spend from November 2011 to March 2012.

Account Details:

- Telephone No & user: 0203 202123
- Status: Normal
- Tariff: Additional User
- Bill day: 5
- Invoice dates: Last: 05 Feb 2012 Next expected: 05 Mar 2012
- Device: 3G POSTPAY SIM
- Connected date: 11 Jun 2007
- Cost centre:

User spend:

- Total of recent charges: £0.00
- Avg spend for the previous 3 months (ex VAT): £13.39

Month	Spend (£)
Nov 11	14.5
Dec 11	23.0
Jan 12	16.5

Tariffs and recent charges

1. From the main screen click the **Account management** tab.
2. Click **Tariffs and recent charges**. You'll see:
 - Tariff details – displays your contract duration, next expected invoice and billing date.
 - Allowances & usage – your minutes, messages and data allowances, individual or shared. Roll over the dials to see your used minutes and allowance.
 - Services & discounts – allows you to view their status. Use the drop-down menu to view by type – **Active**, **Pending**, **Expired** or **All**.
 - Recent charges – click **View recent charges** to review in more detail (see page 20).

The recent charges shown will be those charges since the last invoice.

The screenshot shows the O2 My details interface. At the top, there are navigation tabs: Welcome, Account management, Reports, Invoices, Administration, and Support. The 'Account management' tab is active, and the 'Tariffs and recent charges' sub-tab is selected. The main content area is titled 'Tariff : Additional User' and includes the following information:

- Contract duration:** 24 months
- Next expected invoice:** 05 Mar 2012
- Bill day:** 5th of the month

Below this is the 'Allowances & usage' section, which features three gauges:

- Time:** Shared - 500 minutes
- Units:** Shared - 500 text
- Units:** Personal - 20 MMS

A note states: 'Please note: UK calls usually appear within 24 hours, it may take longer for international or data calls. To see a graph of your spend, choose the recent charges table.'

The 'Services & discounts' section is set to 'Active' and contains the following table:

Type	Description	Start	End	Status	Price (ex VAT)
Service	Free Itemised Billing	05 Aug 2008		Active	£0.00
Service	Int Traveller Service - Free	05 Aug 2008		Active	£0.00
Service	Line Rental Charge	05 Aug 2008		Active	£12.00
Service	Free calls to the Office	05 Aug 2008		Active	£0.00
Service	Multimedia Messaging Service	05 Aug 2008		Active	£0.00
Service	BlackBerry Monthly Roaming	22 Nov 2008		Active	£28.51

At the bottom, the 'Recent charges' section includes a button labeled 'View recent charges £23.02'.

Recent charges

You can review recent charges for an individual number since your last invoice. Using the **Functional Toolbar** (see page 15) you can:

1. Save and download.
2. Print the report.
3. Open the address book.
4. View usage as a graph.

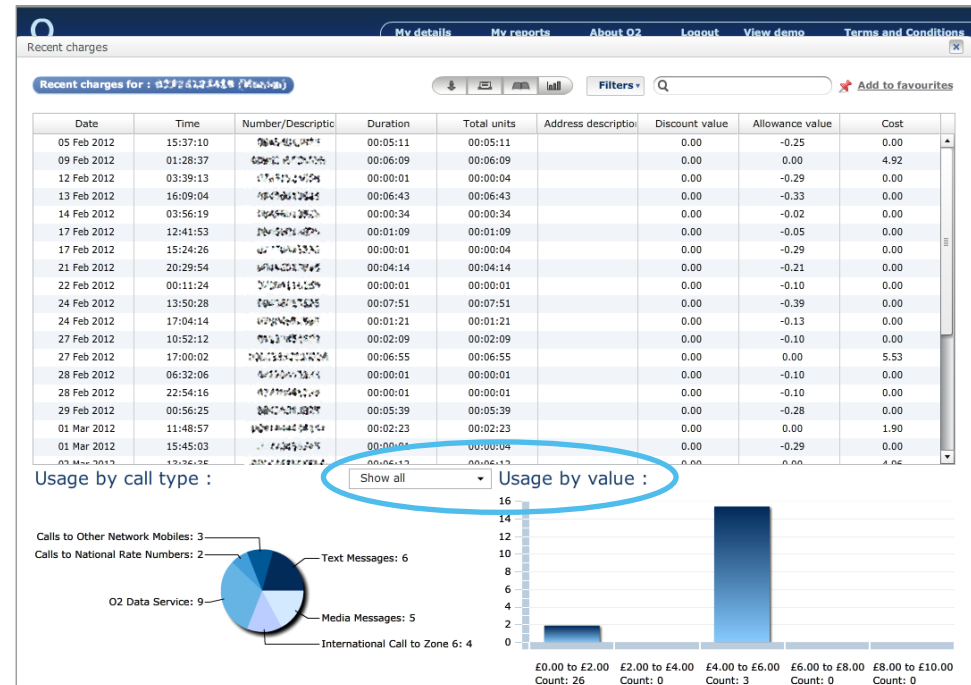
You can also apply filters (see page 32) to refine your data selection by clicking the **Filters** button.

The screen shot opposite shows the recent charges for an individual number using the chart option from the Functional Toolbar.

Clicking a column header allows you to sort the data in ascending or descending order and is shown with ▲ or ▼. You can also drag the columns to make them wider.

Usage by call type

This gives you a quick graphical view on how a users call types are split. For example, all calls made to O₂ mobiles or text messages. Simply click the drop-down menu next to **Usage by call type** and make your selection.



4.4 Call tagging

Tag calls as business or personal with a click. My O2 Business makes it this easy to recover personal call costs. It's simple to manage too. Once a tag is set, it will automatically carry over to the next invoice.

Tags can be:

- Applied at number level
- Used for one off charges
- Used against recurring payments
- Used against discounts (at number level)
- Business, personal or untagged
- Automatically tagged as business if added through the public address book
- Reported on and downloaded in xls files
- Set as a scheduled report.

It is the number that will be tagged not the call.

How to do it

1. From the main screen click **Account management** tab. Highlight the user (subscription level) and click the **Invoices** tab.
2. Under the Tag column, click **Tag** on the invoice you want to see.

Account name	Partial Invoice	Invoice number	Invoice date	Due date	Usage	Tag	Total (ex VAT)
0177 12018756	✓	30832804	05 Jan 2012	05 Jan 2012	Usage	Tag	£43.66
0177 12018756	✓	30832804	05 Dec 2011	04 Jan 2012	Usage	Tag	£81.83
0177 12018756	✓	30832804	05 Nov 2011	05 Dec 2011	Usage	Tag	£32.31

Go to o2.co.uk/myo2business

3. On the next screen under Invoice charges you'll see **Usage, Line Rental charges and Other Charges and Credits.**
4. Use the drop-down menu to select **Business, Personal or Not Tagged.**

Invoice charges	Date From	Date To	Amount	Tag
Usage				
UK VAT exe...	02 Dec 2011	03 Jan 2012	£30.25	
Call Charges	02 Dec 2011	03 Jan 2012	£1.41	
Line Rental Charges				
Line Rental Charge	05 Jan 2012	04 Feb 2012	£12.00	Not Tagged
Other Charges and Credits				
Free Itemised Billing	05 Jan 2012	05 Jan 2012	£0.00	Not Tagged
Int Traveller Service - Free	05 Jan 2012	04 Feb 2012	£0.00	Business
Free calls to the Office	05 Jan 2012	05 Jan 2012	£0.00	Personal
Unlimited Free O2 to O2 Calls	05 Jan 2012	04 Feb 2012	£0.00	Not Tagged
Multimedia Messaging Service	05 Jan 2012	04 Feb 2012	£0.00	Not Tagged

5. To tag an individual number, click **Usage** under **Invoice charges.**
6. You can then select an individual or group of numbers to tag.

Description	Address	Total units	Total (ex VAT)	Tag
0177 12018756		00:06:26	£0.00	Not Tagged
0177 12018756		00:01:13	£0.10	Not Tagged
0177 12018756		00:00:36	£0.15	Not Tagged
0177 12018756		00:00:55	£0.00	Not Tagged
0177 12018756		00:00:41	£0.00	Business
0177 12018756		00:00:13	£0.00	Personal
0177 12018756		00:05:30	£0.00	Not Tagged

7. Click **Save** when finished.

Removing a call tag

1. From the main screen click **Account management**.
2. Highlight the user and click the **Invoices** tab.
3. Under the Tab column click **Tag** on the invoice you want to see.
4. Use the drop-down menus to select **Not Tagged**.
5. Click **Save**.

Tagging using the address book

Public address entries to the address book are automatically set as Business. These can be overridden when tagging. For more information on the address book see page 23.

Exporting tag lists

You can quickly report on tags for an individual user. You can choose from:

- Immediate - on screen
- Submit for Download - more detailed information
- Email - more detailed information.

How to do it

1. From the main screen click **Account management** tab. Highlight the user and click the **Invoices** tab.
2. Under the Tag column, click **Tag** on the invoice you want to see.
3. On the next screen click **Usage** under **Invoice charges**.
4. Click the arrow.
5. From the Export Tag List box, choose your delivery method and Tag to report on.

Go to o2.co.uk/myo2business

Report Name	Invoice Tagged Summary	For 07736232419 (Monica)	Period from 08 Jan 2012 to 04 Mar 2012	Tagging
	Invoice charges	Business	Personal	Not Tagged
▼	Line Rental Charges			
	<input type="checkbox"/> Line Rental Charge	£12.00	£0.00	£0.00
	<input type="checkbox"/> BlackBerry Monthly Roaming	£0.00	£28.51	£0.00
▼	Other Charges and Credits			
	<input type="checkbox"/> 500MB UK Data	£0.00	£0.00	£0.00
	<input type="checkbox"/> Free calls to the Office	£0.00	£0.00	£0.00
	<input type="checkbox"/> Multimedia Messaging Service	£0.00	£0.00	£0.00
	<input type="checkbox"/> Int Traveller Service - Free	£0.00	£0.00	£0.00
	<input type="checkbox"/> Free Itemised Billing	£0.00	£0.00	£0.00
▼	Usage	£14.47	£0.00	£10.42
	<input type="checkbox"/> Call Charges	£14.47	£0.00	£10.42
	<input type="checkbox"/> Personal Charges	£0.00	£0.00	£0.00

Export Tag List

Delivery Options : Submit for download

Type : All Tagged Details

Format : CSV for MS Excel

Tag : All

Proceed

You can also tag in the Reports tab, when your reporting structure is at a number level.


4.5 Address book

Address books can be created manually (see below) or imported from Excel, (see page 24). Once the information is in, address details will appear in the usage reports. See page 28 for information on reports.

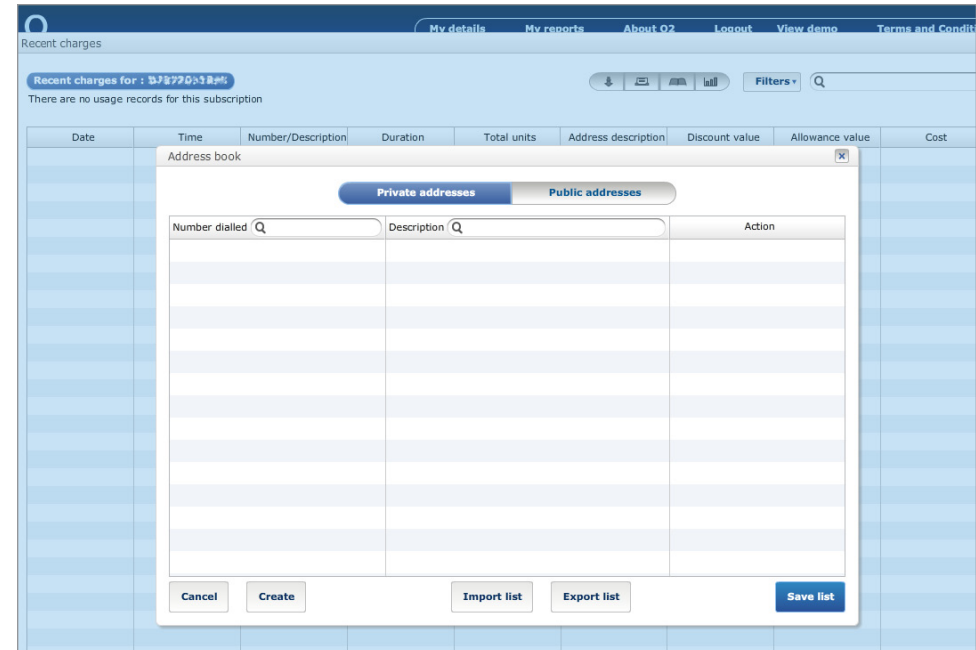
There's two types of address book, and you can allocate up to 20,000 names and descriptions in each.

- Private - only you will be able to see
- Public - can be seen by other registered users in your company.

Creating a new address book

1. From the main screen click the **Account management** tab.
2. Click **Tariffs and recent charges** then click **view recent charges**.
3. Click  from the Functional Toolbar (see page 15).
4. Click **Private addresses** or **Public addresses**.
5. Click **Create**.
6. Type the number (no spaces) then the description.
7. Click **Create** to add further names.
8. Click **Save List**.

When adding entries to the address book you may have to enter multiple versions for certain call types (see page 24).



Importing an address book

You can easily import an address book into My O2 Business.

1. In Excel create two columns headed **Number** and **Description**. Make sure that the cells are formatted to contain text, otherwise the leading 0 will be missing. You can also use a * symbol for a wildcard.

All text messages are delivered without the leading 0. So if you want to separate texts from calls you will need to enter details in twice. Once with the leading 0 and once without, as shown below.

	Number	Description
1	1200	Traffic Line
2	02071234567	Head Office
3	0113202*	Leeds Office
4	07710000000	Phil Jones - mobile
5	7710000000	Phil Jones - text

2. Save the file as csv (MS-DOS) file type.
3. Open the address book (see page 23).
4. Click **Private** or **Public**.
5. Click **Import list** and locate your file, click **Open**.

The * symbol lets you batch numbers together, eg. by area code to save you labelling each number.

4.6 Favourite numbers (SMB customers only)

You can manage the 10 landline numbers you call most. You can add your own numbers or My O₂ Business will suggest them.

How to do it

1. From the main screen click the **Account Management** tab.
2. Choose the account you want from the left-hand side.
3. Click the **Favourite numbers** tab.
4. Click **Add** to update your list.
5. Click **Add your own number** to type in your chosen landline numbers, or click **Recommended** to see a list of numbers where you can make the most savings, based on the last three, fully invoiced months.

The screenshot shows the O2 My O2 Business account management interface. The top navigation bar includes 'My details', 'My reports', 'About O2', 'Logout', 'View demo', and 'Terms and Conditions'. Below this, there are tabs for 'Welcome', 'Account management', 'Reports', 'Invoices', 'Administration', and 'Support'. The 'Account management' tab is active, and the 'Favourite numbers' sub-tab is selected. The main content area is titled 'Free calls to the Office' and includes a 'Terms and Conditions' link. Below the title, there are 'Delete' and 'Add' buttons. The main section is a table with two columns: 'Your favourite numbers' and 'Selected'. The table contains four rows of phone numbers, each with a checkbox in the 'Selected' column. At the bottom of the table, there are two buttons: 'Recommended' and 'Add your own numbers'. Below these buttons, there is a section titled 'Add to your favourite numbers' with a text input field and an 'Add to list' button. The text below the input field reads: 'Manage your favourites and remember to keep them up to date. "Recommended" suggests the numbers where you can make the most savings over the last three fully invoiced months.'

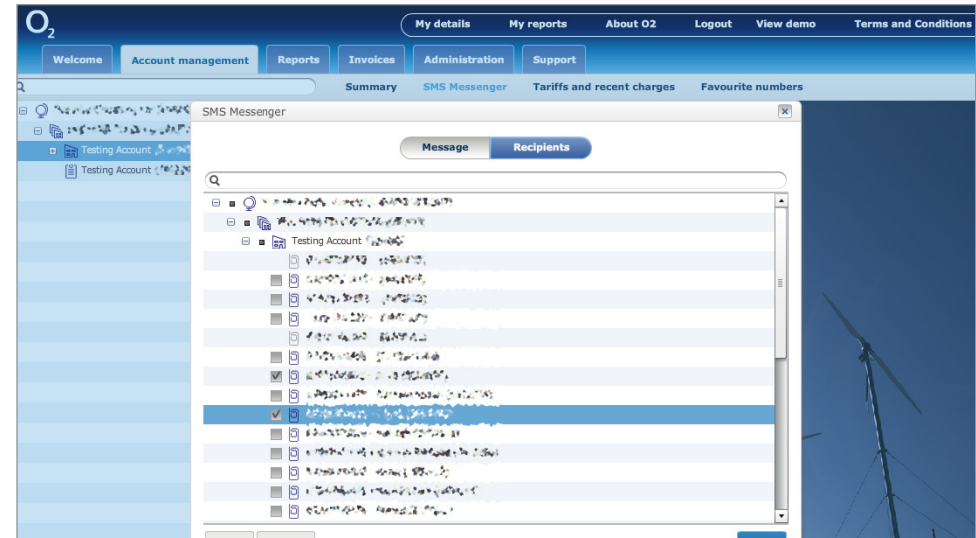
4.7 SMS Messenger (SMB customers only)

This lets you send text messages to all or some your colleagues.

How to do it

1. From the main screen, click the **Account management** tab.
2. Click **SMS Messenger** tab and then click the **SMS Messenger** button.
3. Type your message, then click **Next**.
4. Select who you want to send the message to from the list or use the search box.
5. Click **Send**.

It can vary how long it takes to deliver your message, depending on the amount of messages being sent and the network.



Section 5

Reports

See and analyse how your business uses its phones. You can also tailor reports around the things that matter to you most.

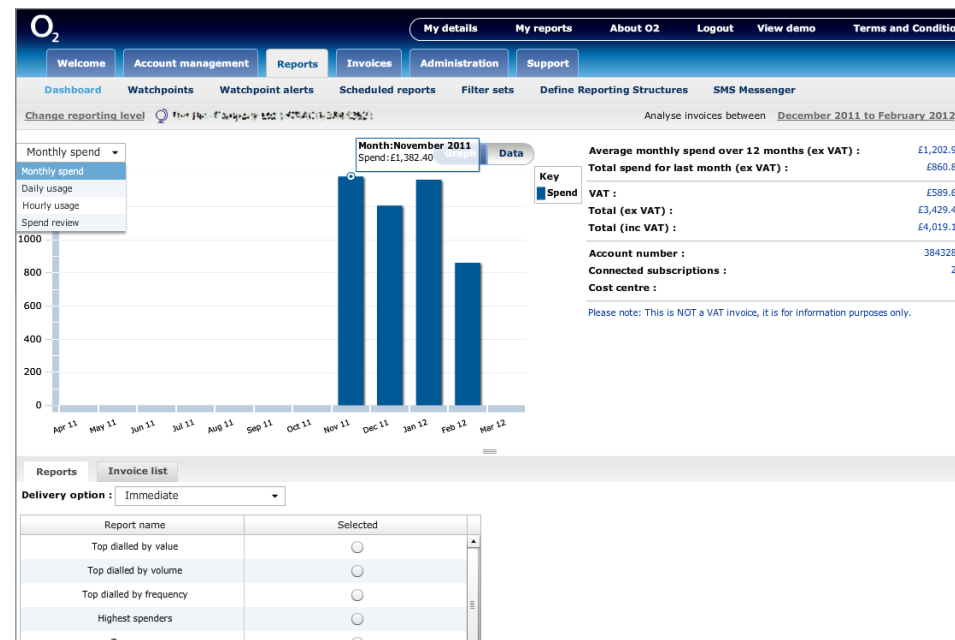
- 5.1 Reports
- 5.2 Reporting structures
- 5.3 Working with reports
- 5.4 Filters

5.1 Reports

The Reports tab lets you review how much you spend. It gives you easy and clear totals, summary and trend information across your account. You can even create your own report filters. Simply view, print or download from the Reports feature at any time in pdf, xls or csv format.

Other options available

1. **Dashboard** - provides a summary of your spend, based on the reporting structure chosen (see page 30). View and download reports from here too.
2. **Watchpoints** - allows you to set up alerts. For example, fixed-line or mobile accounts, or numbers that have spent above a certain amount.
3. **Watchpoint alerts** - once the Watchpoint has been set, for example any number spending more than £100, an alert will tell you who met or exceeded the limit.
4. **Scheduled reports** - lets you create a recurring report to run automatically and email results. Once you've created a scheduled report you can run it immediately and download through My Reports.
5. **Filter sets** - use to filter usage reports to look at specific call types, dates, destinations, costs, numbers dialled and more. You can use the additional **Dialled numbers** or **Working hours** lists to include or exclude specific numbers or times for the report. For example, to see what calls are made out of office hours.
6. **Define Reporting Structures** - create new reporting structures that are right for business. By creating a reporting structure you can run reports (ie those visible on the Dashboard screen) against this.



Viewing by date

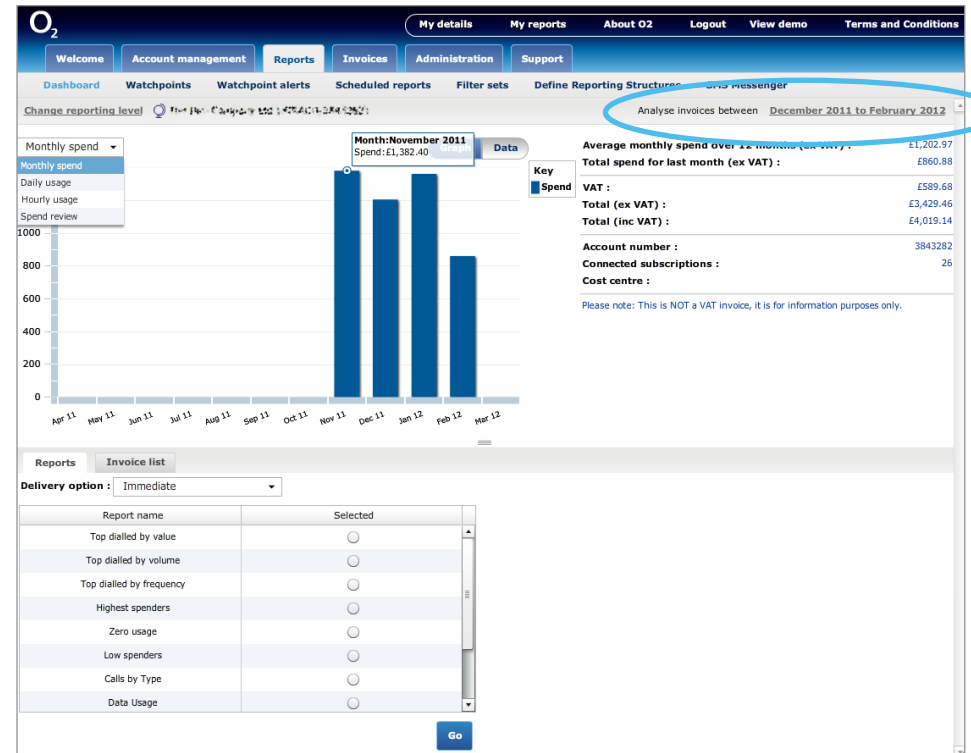
You can search for information between two specified dates.

1. From the main screen click the **Reports** tab.
2. Click the date range next to **Analyse invoices between**.
3. Select the dates and period from the drop-down menu and click **Apply these dates**.

Viewing by spend or usage

1. From the main screen click the **Reports** tab.
2. From the monthly spend drop-down menu under **Change reporting selection** select from **Monthly spend**, **Daily usage**, **Hourly usage** or **Spend review**
3. Click **Invoice list** under the chart.
4. Click **Usage** on the line of the invoice number you want to view.
5. You can refine your search using the **Functional Toolbar** (see page 15).

You can change your reporting level at any time. See page 30, Reporting structures.

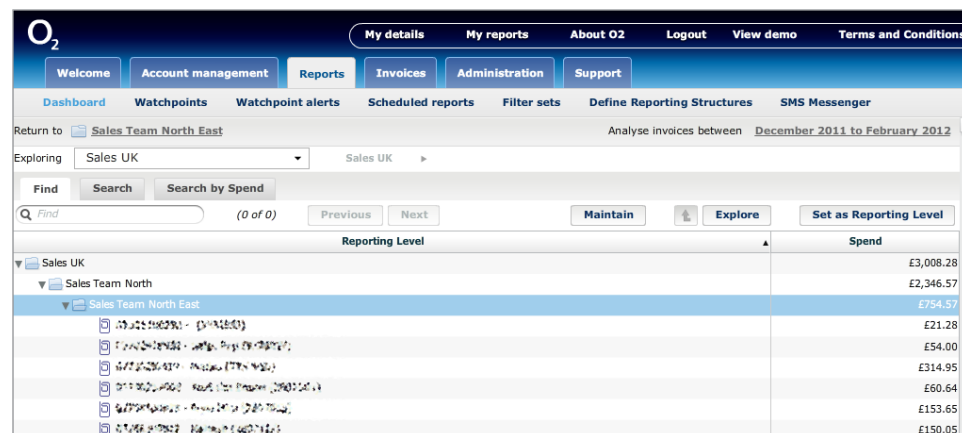


Changing the reporting level

Once you've set up your reporting structures, you'll be able to see these in the Exploring drop-down menu when changing the reporting levels.

How to do it

1. From the main screen click the **Report** tab, click **Dashboard** then click **Change reporting level**.
2. Click the drop-down menu next to **Exploring** and select the required name, the folder appears in the pane below.
3. From your structure select the folder or individual number and click **Set as Reporting Level**.
4. You'll then return to the dashboard.



The screenshot shows the O2 reporting interface. At the top, there are navigation tabs: 'My details', 'My reports', 'About O2', 'Logout', 'View demo', and 'Terms and Conditions'. Below these are main navigation buttons: 'Welcome', 'Account management', 'Reports', 'Invoices', 'Administration', and 'Support'. A secondary set of buttons includes 'Dashboard', 'Watchpoints', 'Watchpoint alerts', 'Scheduled reports', 'Filter sets', 'Define Reporting Structures', and 'SMS Messenger'. The 'Exploring' dropdown menu is open, showing 'Sales UK' selected. Below the menu, there are search options: 'Find', 'Search', and 'Search by Spend'. A search bar contains 'Find' and '(0 of 0)'. There are also 'Previous', 'Next', 'Maintain', 'Explore', and 'Set as Reporting Level' buttons. The main table displays reporting levels with columns for 'Reporting Level' and 'Spend'.

Reporting Level	Spend
Sales UK	£3,008.28
Sales Team North	£2,346.57
Sales Team North East	£754.57
12345678901234567890	£21.28
12345678901234567890	£54.00
12345678901234567890	£314.95
12345678901234567890	£60.64
12345678901234567890	£153.65
12345678901234567890	£150.05

To edit a reporting structure, click **Maintain**.

Defining user access to structures

You can restrict user access to only see structures you've created. This is done via the Administration tab. See page 8, Managing your users.

5.3 Working with reports

You'll find all your reports by clicking on **Dashboard**. Choose what to report and when from. You can run your reports in different ways: view immediately, download or email.

Immediate reports

View on-screen and switch between graphs and data views.

How to do it

1. From the main screen, click the **Reports** tab, then click **Dashboard**.
2. The report will run, based on the reporting structure shown. To change it, click **Change reporting level**.
3. Choose your date range from the top right of the screen.
4. From the **Delivery option** drop-down, select **Immediate**.
5. Choose the reports you want and click **Go**.

Some reports will not be available with the **Immediate** delivery option. You will need to select download or email.

The screenshot shows the O2 business portal interface. At the top, there are navigation tabs: Welcome, Account management, Reports, Invoices, Administration, and Support. Below this, there are sub-tabs: Dashboard, Watchpoints, Watchpoint alerts, Scheduled reports, Filter sets, Define Reporting Structures, and SMS Messenger. The main content area displays a report for 'The Hira Company Ltd (HIRACO/3843282)' for the period 'December 2011 to February 2012'. The report is titled 'Monthly spend' and shows a bar chart with the following data:

Month	Spend
Nov 11	1300
Dec 11	1200
Jan 12	1300
Feb 12	800

Summary statistics on the right:

Average monthly spend over 12 months (ex VAT) :	£1,202.97
Total spend for last month (ex VAT) :	£860.88
VAT :	£589.68
Total (ex VAT) :	£3,429.46
Total (inc VAT) :	£4,019.14
Account number :	3843282
Connected subscriptions :	26
Cost centre :	

Below the chart, there is a 'Reports' section with a 'Delivery option' dropdown set to 'Download/Email'. A table lists various reports with checkboxes for selection and file type options:

Report name	Selected	File Type
Top dialled by value	<input type="checkbox"/>	CSV
Top dialled by volume	<input checked="" type="checkbox"/>	CSV
Top dialled by frequency	<input checked="" type="checkbox"/>	CSV
Highest spenders	<input type="checkbox"/>	PDF
Zero usage	<input type="checkbox"/>	CSV
Low spenders	<input type="checkbox"/>	CSV

At the bottom of the report selection table, there is a 'Select All' checkbox and a 'Next' button.

Important: The defined date range will pick up all invoices produced in that time, which may include charges from outside that period. Eg if you select 1st March as the start of your reporting period, and your invoice is produced on the 2nd of the month, the report will show all charges from your 2nd March invoice which will mainly be charges from February.

Download or email reports

Select multiple reports and choose to download or send by email. You can check the status of the reports you've sent in **My reports**. You can use filters on some reports, including reporting over a chosen time period. See page 35 to find out more.

How to do it

1. From the main screen, click the **Reports** tab, then click **Dashboard**.
2. The report will run based on the reporting structure shown. To change it, click **Change reporting level**.
3. Choose your date range from the top right of the screen.
4. From the **Delivery option** drop-down, select **Download/Email**.
5. Choose which reports and file types you want and click **Next**.
6. Depending on the report, you may be able to add a filter. Choose your filter from the **Report Filter** drop-down or select **No filter** or **New filter** set. See page 35 for more on filters.
7. Click **Next**.
8. From the **Export option** drop-down, click **Download** or **Email** and add email addresses.
9. Click **Go**.
10. Click **My Reports** to check the status of your download or email.

The screenshot shows the O2 Reports interface. At the top, there are navigation tabs: Welcome, Account management, Reports, Invoices, Administration, and Support. Below these are sub-tabs: Dashboard, Watchpoints, Watchpoint alerts, Scheduled reports, Filter sets, Define Reporting Structures, and SMS Messenger. The main content area displays a bar chart titled 'Monthly spend' for the period from April 2011 to March 2012. The y-axis represents spend in pounds, ranging from 0 to 1400. The x-axis shows months from Apr 11 to Mar 12. A key indicates that the blue bars represent 'Spend'. To the right of the chart, a summary table provides the following data:

Average monthly spend over 12 months (ex VAT) :	£1,202.97
Total spend for last month (ex VAT) :	£860.88
VAT :	£589.68
Total (ex VAT) :	£3,429.46
Total (inc VAT) :	£4,019.14

Below the chart, there is a 'Reports' section with a 'Delivery option' dropdown set to 'Email'. A table lists various reports with checkboxes for selection and dropdowns for file types:

Report name	Selected	File Type
Top dialled by frequency	<input checked="" type="checkbox"/>	PDF
Highest spenders	<input type="checkbox"/>	PDF
Zero usage	<input checked="" type="checkbox"/>	CSV
Low spenders	<input type="checkbox"/>	PDF
Calls by Type	<input checked="" type="checkbox"/>	PDF
Data Usage	<input checked="" type="checkbox"/>	CSV
Tag Summary	<input checked="" type="checkbox"/>	XLS
Cost Breakdown by Subscription Type	<input type="checkbox"/>	PDF

At the bottom of the interface, there is a 'Select All' checkbox and a 'Go' button. An 'Email recipients' field is also visible on the right side.

Important: The defined date range will pick up all invoices produced in that time, which may include charges from outside that period. Eg if you select 1st March as the start of your reporting period, and your invoice is produced on the 2nd of the month, the report will show all charges from your 2nd March invoice which will mainly be charges from February.

Scheduling a report

You can set the following reports to run automatically based on your requirements.

Pre-defined - most commonly asked reports, eg. highest spenders, zero usage etc. Based on number of invoices captured within your specified date range.

Invoice csv reports - reports presenting invoice specific information. Based on number of invoices captured within your specified date range.

Usage report - usage irrelevant of invoice. Based on your actual specified date range.

How to do it

1. From the main screen click the **Reports** tab, and then click **Scheduled reports**.
2. Click **Schedule new report** and follow the on screen wizard.

The screenshot shows the O2 business portal interface. At the top, there are navigation tabs: 'Welcome', 'Account management', 'Reports', 'Invoices', 'Administration', and 'Support'. Below these are sub-tabs: 'Dashboard', 'Watchpoints', 'Watchpoint alerts', 'Scheduled reports', 'Filter sets', 'Define Reporting Structures', and 'SMS Messenger'. A search bar and an 'Options' dropdown are visible. The main content area shows a table with columns: 'Report', 'Report type', 'Reports structure', 'Reporting level', 'Enabled', and 'Selected'. A modal window titled 'Schedule new report for the Month: 1 (4th Oct 2014 - 3rd Nov 2014) : Step 1 of 4 - Report details' is open. The modal has a progress bar with 'Report details', 'Select report', 'Additional Filters', and 'Deliver to'. The 'Report details' section includes:

- Name:** (empty text field)
- Run the report:** Monthly (dropdown), **On the:** 1 (spinner)
- Run the report for the last:** 90 (spinner) **days**
- Report type:** Predefined report (dropdown)
- Enable report?:**

 On the right side of the modal, there is a warning: 'ONLY INVOICED DATA WILL BE DISPLAYED IN DELIVERED RESULTS.' and a note: 'Results will only be displayed when reporting against periods that have been invoiced, and when scheduling a report please ensure the "Run the Report" option is set for a date after your billing date.' At the bottom of the modal are buttons for 'Cancel', 'Previous', 'Next', and 'Save'.

Editing a report

1. From the main screen click the **Reports** tab, and then click **Scheduled reports**.
2. Click the report to be edited.
3. From the **Options** drop-down menu click **Edit**.
4. Make any changes and click **Save**.

The scheduled reports will be based on the reporting structure that you've set up. To change this click **Change reporting level** on the **Dashboard** tab.

5.4 Filters

Change the information you see on screen to match what you need by clicking on Filters. (Eg. calls between certain dates and times).

Filters are used across My O₂ Business, including **View Recent Charges** and **Viewing an Invoice**. What is shown will vary depending on whether you're viewing billed or unbilled data.

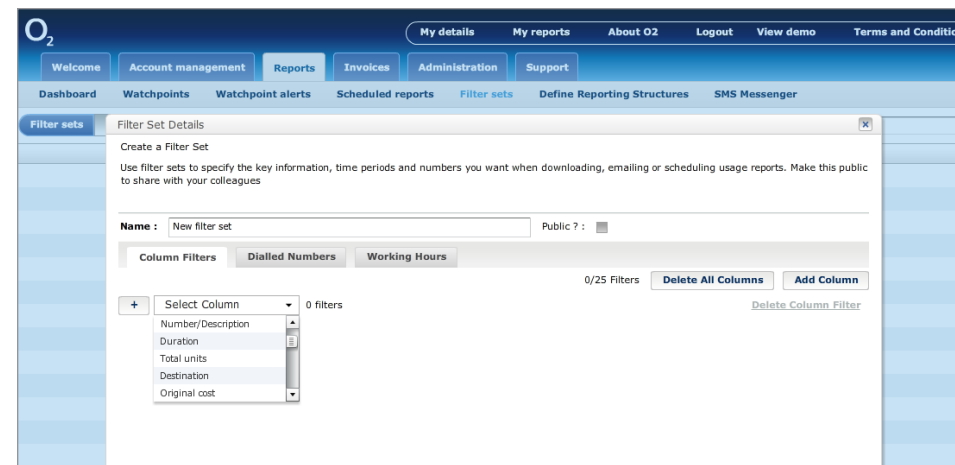
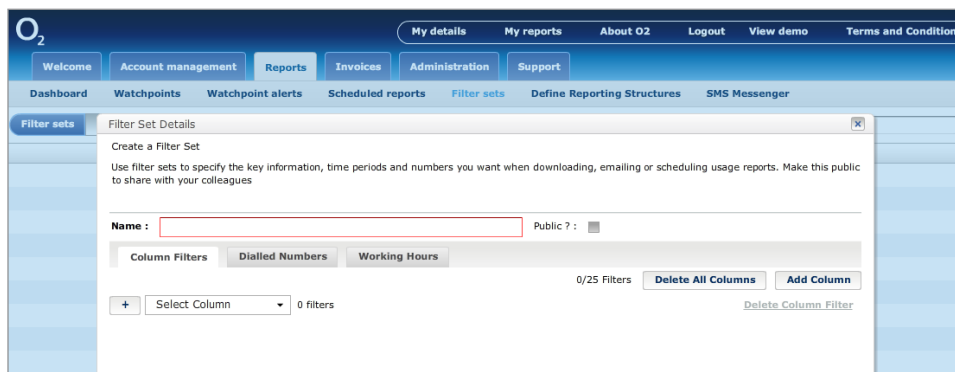
When creating a filter set you may need to type an entry manually. Eg. call type or dialing number. Please make sure that you type the entry exactly as it appears.

When you see the **Functional Toolbar** (see page 15) you can also filter information by clicking the **Filter button** which appears next to it.

Creating a new filter set

If you want to apply working hours or dialled number list you'll need to have created these first, see pages 36 and 37.

1. From the main screen click the **Reports** tab, click **Filter sets**.
2. Click the **+** button and enter a name for the new filter set.



3. Select the column filter you want to activate from the **Select Column** drop-down menu and fill in any details.
4. To add more filters to the same column, click **Add Filter**. Or to add a new column filter click **Add Column**. You can add up to 25 filters.
5. Click **Save**.
6. To add a working hours list (see page 37), click the **Working Hours** tab.
7. Select the list you want to use.
8. Choose whether you want the filter to be active **Inside** or **Outside** of the working hours list.
9. Click the **+** button.
10. Your working hours list will be added to your filter set. To add a dialled number list (see opposite), click the **Dialled numbers** tab.

11. Select the **Dialled numbers** list you want to use.
12. Choose whether you want the filter to **Include** or **Exclude** the dialled numbers list.
13. Click the **+** button, your dialled numbers list will be added to your filter set, click **Save**.

To let your colleagues see your filter set tick the **Public?** box.

Deleting a filter set

1. Click on **Filter sets**.
2. Highlight the row that contains the one you wish to delete.
3. Click **Delete**.

Creating a dialled numbers list

A dialled numbers list lets you include or exclude a set of numbers in your usage reports.

1. From the main screen click the **Reports** tab.
2. Click **Filter sets**.
3. Click the **Dialled Numbers** tab.
4. Click the **+** button.
5. Enter a name for the new destination list.
6. Click the **+** button.
7. Click the **Destination** box and enter the number you want to add to your list.
8. Click the **Destination Description** box and enter a name, click the **+** button to add more.
9. With the new destination selected, click **Save**.
10. Click **Save**.

To let your colleagues see your dialled numbers list tick the **Public?** box.

Editing or deleting a dialled numbers list

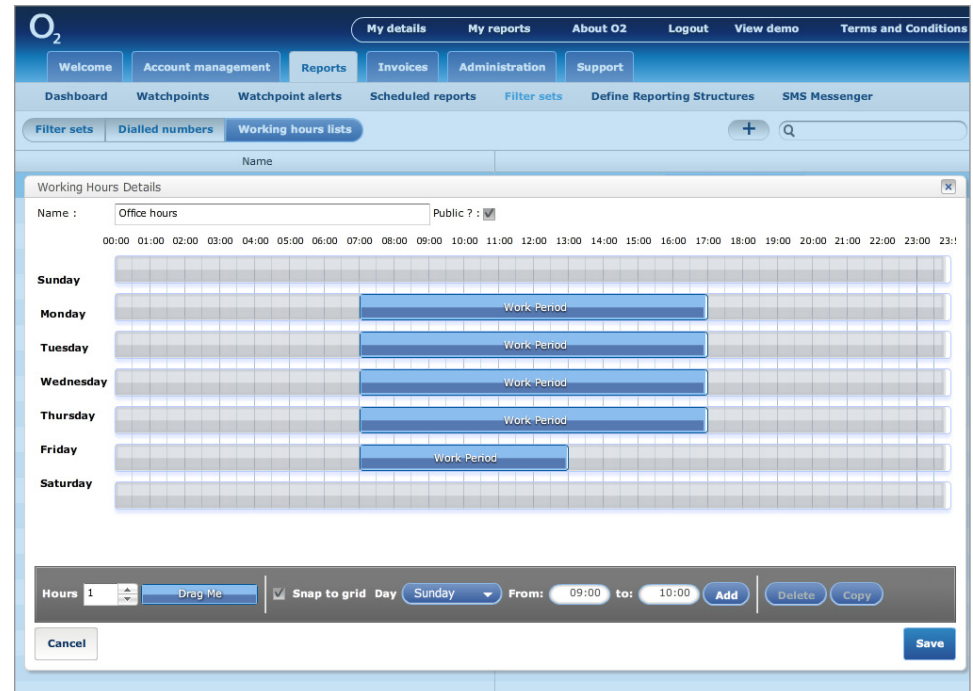
1. Click on **Dialled numbers**.
2. Highlight the row, click **Edit** or **Delete**.

Creating a new working hours list

Working hours lists helps you determine whether calls are being made in or out of hours.

1. From the main menu click the **Reports** tab.
2. Click **Filter sets**.
3. Click the **Working hours lists** tab then click the **+** button.
4. Enter a name for the new working hours list.
5. Either use the arrow buttons or enter the number of hours you want your working hours list to run.
6. Click and drag the **Drag Me** block to where you want on the timeline.
7. To extend or shorten the working hours block, click **Edit**.
8. Change the new times as you want them, click **Save**.
9. The working hours block will resize accordingly. To delete the working hours block, select the block to be removed and click **Delete** from the menu bar at the bottom.
10. As an alternative to dragging and dropping the working hours blocks, click the **Day** drop-down menu.
11. Select the day for which you want a working hours list.
12. Change the working hours time as you want it, click **Add**.
13. The working hours block will be added to the timeline. Repeat to add working hour blocks to other days.
14. With all hours and days added, click **Save**.

Go to o2.co.uk/myo2business



Deleting a new working hours list

1. Click on **Working hours lists**.
2. Highlight the row that contains the one you wish to delete.
3. Click **Delete**.

To let your colleagues see your working hours list tick the **Public?** box.

Section 6

Invoices

With My O₂ Business all your invoices, and current transactions are all in one place. Whenever you need them.

6.1 Invoices

Section 7

Help

All the help you need.

7.1 **Support**

7.1 Support

Access FAQs, My O₂ Business support and information as well as general billing help

1. After you've signed in (see page 4) click the **Support** tab or go to **o2.co.uk**.
2. Click **O2 Business** from the top right of the website.
3. Click **Support** and then click the **Accounts & Billing** tab.

Access My O₂ Business step-by-step & video tutorials

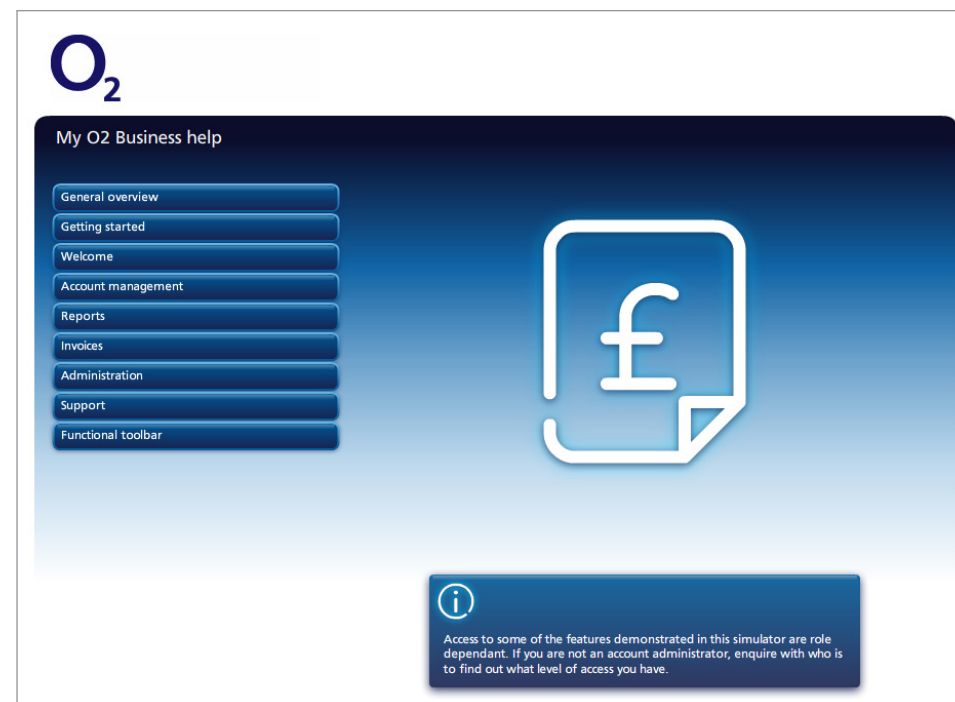
1. After you've signed in (see page 4) click **View demo**.
2. Select the relevant topic you need help with.
3. Follow the instruction steps or watch the video by clicking **Watch topic**.
4. Bookmark www.selflearning.co.uk/o2/myo2business

SMB Customer Service team

From your O ₂ mobile	8002 (free)
From a landline	0800 977 7337 (free)
From outside the UK	+ 44 844 8090 200 [†]
Opening hours:	8am - 9pm (Mon - Fri)
	8am - 8pm (Sat)
	8am - 6pm (Sun)

[†] Free from an O₂ mobile, other providers' charges may vary.

If you're an Enterprise customer, please talk to your Account Manager.



Go to o2.co.uk/myo2business

