Purpose

Create Account Wizard

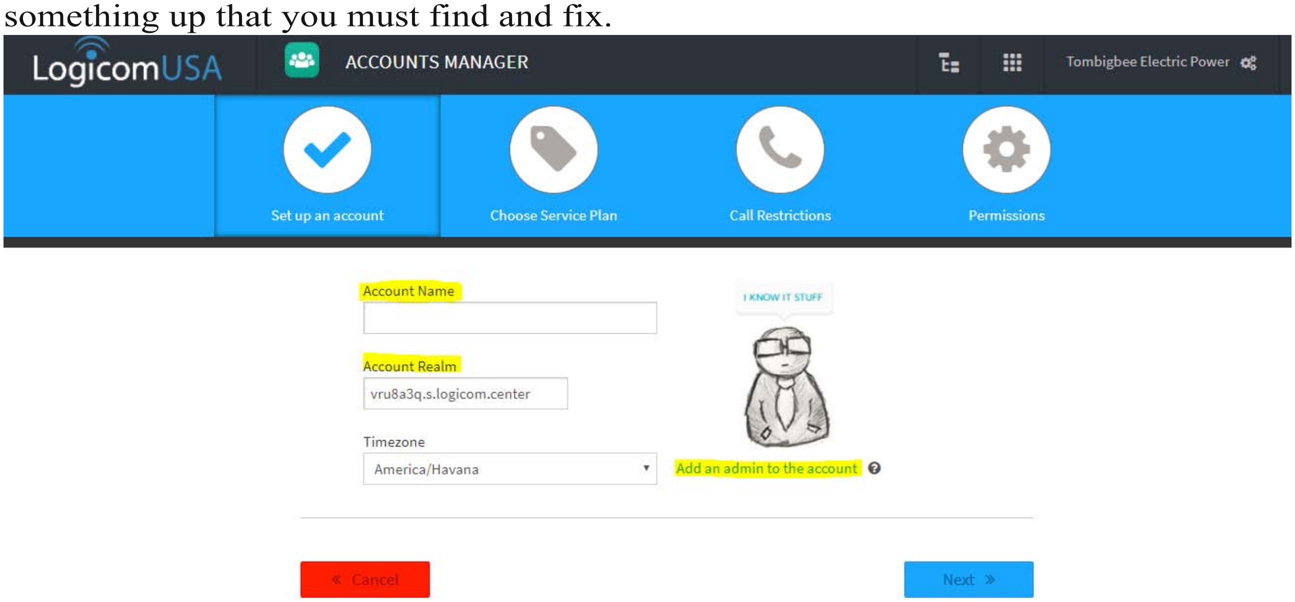
Provide some Best Practices, and tips when creating an account. Read the entire article before creating your first account. Especially the parts about the Account Realm in both the Create Account Wizard and Account Manager sections, since it has the most far reaching effects if it is needed to be changed later.

Set up an account

Account Name. Choose an account name. Generally best to use the company's name, a shortened version of their name or an acronym from their name. A DID does not provide easy recognition of who the account belongs to. It will also be used in reports and will be used on the login page by all users of the account. So simple. Short and recognizable are desirable attributes.

Account Realm. This is very significant and deserves forethought. But we will deal with this after the wizard. Use the auto-generated value.

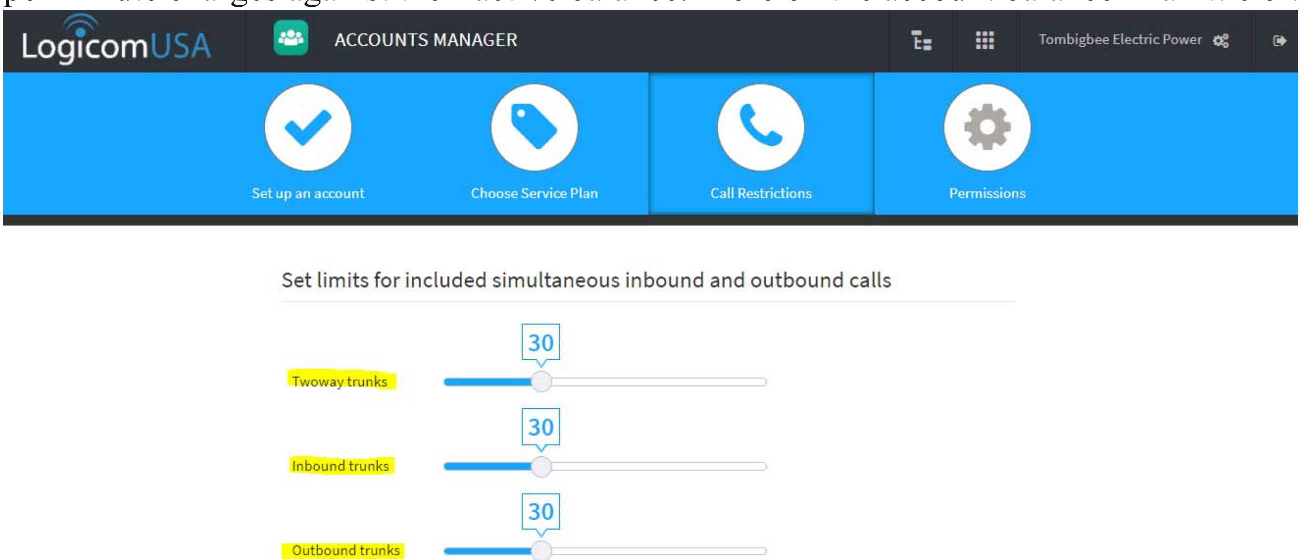
Add an admin to the account. Click that if you want to create an admin user for the account. This would be a user from the company that you are creating the account for that will have access to managing all internal aspects of their account and be able to see everything for all the users. Including things like viewing faxes and listening to voicemails if you give them the Fax Manager and Voicemail Manager apps. This can allow them to manage themselves but can also cause you problems if they mess something up that you must find and fix.



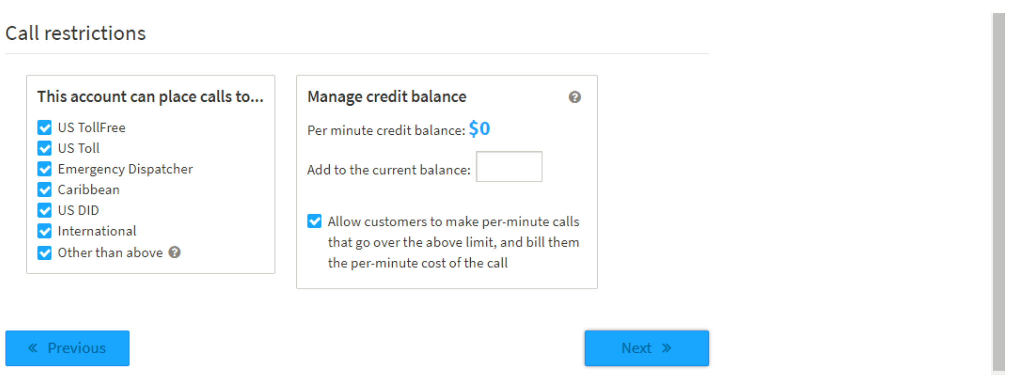
Choose Service Plan Infrastructure.
Service plans apply to resellers, not to the customers of resellers.

Restrictions

There is nothing to do here unless you have your own cluster with the Private Cloud or Global Trunk Limits. Think of a Trunk like a physical phone line. Only one call can be active for each trunk. Inbound Trunks can only handle calls inbound from a carrier, Outbound Trunks can only handle calls outbound to a carrier, and Two-Way Trunks can handle calls to or from a carrier just like a physical phone line. Trunks only apply to calls to US and Canada numbers. If a call for an account is not able to use a trunk because it is outside the us or Canada or all the account's trunks are already in use, the call can be applied per minute charges against their active balance. More on the account balance in a little bit.



Call restrictions. This account can place calls to. This determines what areas outbound calls will be allowed to. If one is not checked, calls to that destination area will be blocked regardless of available trunks or per minute availability.



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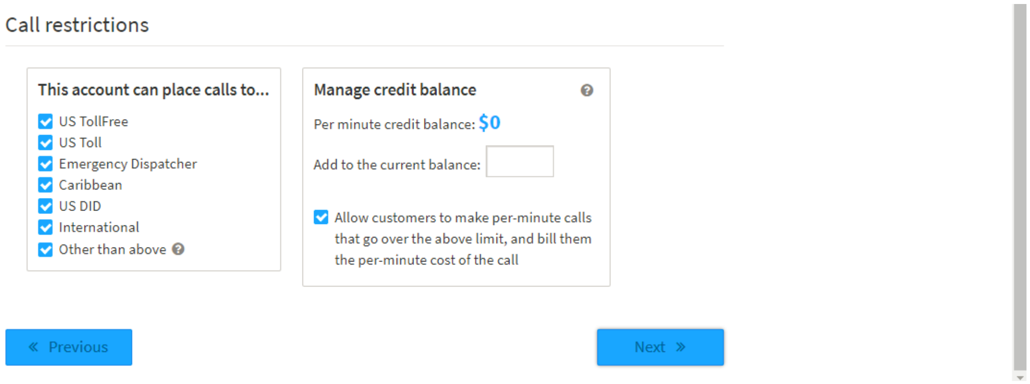
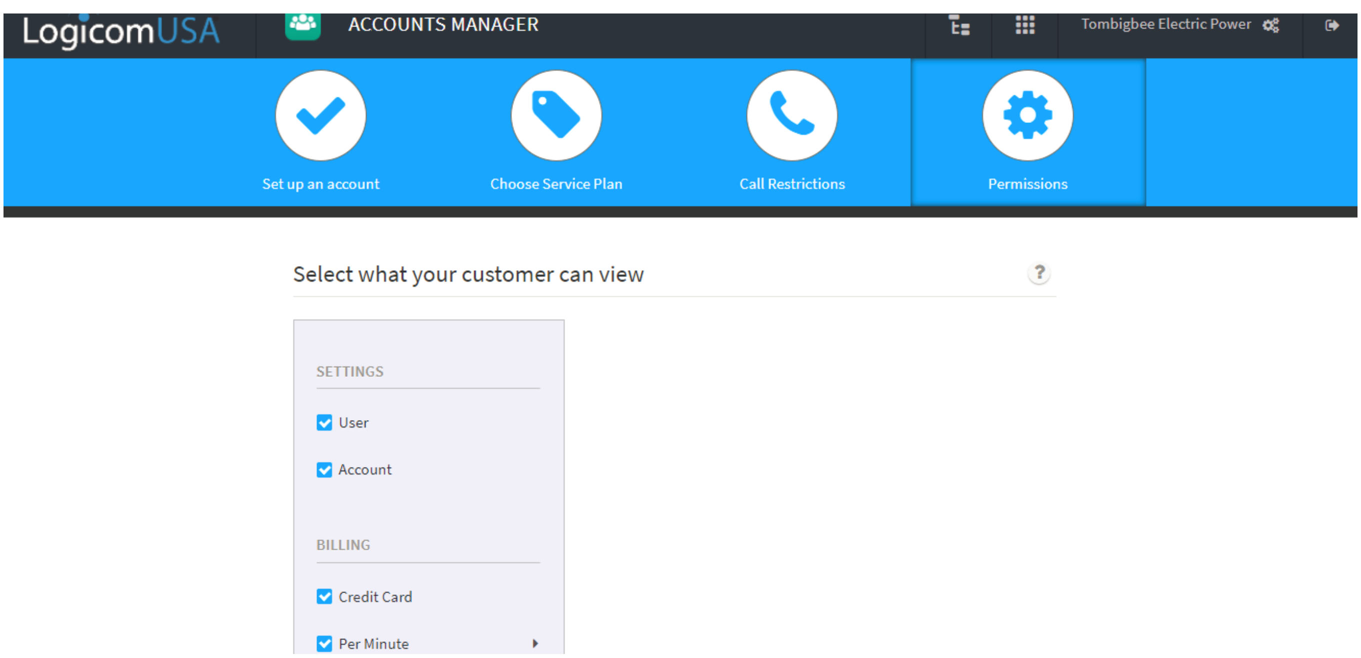


Manage credit balance. The "Per minute credit balance· is a value that is used for per minute calls. This value on your reseller account can be increased by charging your credit which you can do manually or enable Auto Top Up. But the system is not yet able to connect your account to a bank account so you can have your customers manage their own accounts with a credit card as you can. So, you can add credit to their account manually here or later in the Account Manager, Limits tab. Since it is not tied to a credit card you need to manage charging your customer outside of our system and add credit to their account according to your contract with them. Depending on your contract with your customers you may want to use trunks and per minute credit in a way to reduce you and your customer's exposure to fraud.

Permissions

Select what your customer can view. Choose which ones you want your customer to be able to see and manipulate. You will not want Credit Card, Service Plan or Transactions checked. Submit when ready. There are many things it creates so it will take a little while to process. These are the very basics for creating an account. Please continue to read the next part to complete the account creation before moving on to setting up how the account will handle calls.



Account Manager

Settings for accounts managed here are not available to be managed from inside the account by your customer or you. We will only go over the things not covered in the Create Account Wizard section above and there are important things to note beyond what you see in the GUI.

Overview

Here you will be able to manage general settings for the account. You can change the Account Name and realm at any time but there can be far reaching implications to your client. So, it is important to get it right when you initially set things up. Each of the sections of the Overview can be expanded to show more info and allow you to make changes.

Account Realm As mentioned in the Create Account Wizard section, what this is set to is very significant and important to get right when you are first setting up the account because changing it later can create a lot of work and phones not to work while you get them all updated.

The Account Realm will be used by all the account's phones in registrations and potentially for sending faxes. While it is possible to make it something that will not be matched by a DNS record, having a DNS MX record that will match it is important for fax boxes and can be essential for some phones, devices, or a remote PBX to have a DNS A record, SRV and/or NAPTR records.

By default, the realm is auto-generated by the Create Account Wizard and is a domain name that will be matched by wildcard A and MX DNS records. However, the first part of the auto-generated name is a random string, like "8dijd6". But if you see that auto-generated realm somewhere, it will provide no hint which account it belongs to. FYI: You can use the Account Jump tool to find the account it belongs to. I prefer that first part of the realm/domain name be something that is recognizable, representing the account. After all, if they use fax boxes they will be sending emails to that domain and it will make more sense to the users if they see something that represents their company.

The final and most important consideration for the realm is if you plan to but have not yet set up DNS white labeling so your customers will see/use your domain names. hosting company name, logos, etc. instead of the hosting companies. If that is so then you may want to tackle your white labeling before creating the account. It depends on if you're ok with the customer seeing your hosting company's information the same as you see when you log in AND you will have to go through the work to changing the realm later once DNS white labeling is done. Changing an account over to white labeled DNS after setting up the white label DNS is not required. Like if you create an account for your own office before setting up white labeling you likely won't care if the phones in that account continue to have a realm that is not white labeled.

Changing the realm is possible to be a rather smooth thing if you know what to do, prepare ahead of time and do it when the customer is not actively using their phones. It’s something you would want to discuss with your support representative. Advanced Provisioner can be a big key to that transition.

Limits

This is where you can among other things see and change the customer's balance. Number Features. Depending on your host system provider and your reseller contract, E911 and CNAM may be included with the cost of numbers that are purchased through the system. They cannot be managed through Kazoo if you are using your own carriers and getting numbers through them. Read more about this in the BYOC (Bring Your Own Carrier) article Carrier This is where you would change things for an account to use your carriers if you choose to use your own carriers (BYOC). If you are using BYOC, you would select the "Use Partner "......" Carriers" and Update. Otherwise leave it selected to "Use System-wide Carriers App Exchange

The Apps listed here can be enabled or disabled for the users of the account to have access to for managing their account. Hover over the text of the app for a short description and go to Monster Ul Apps for documentation on them. Disabling an app does NOT mean that you cannot as an admin in the parent account with access to the app use the app to manage things the app exposes. For example, if you want them to be able to have an admin that car manage Smart PBX but not to Fax Manager and Voicemail Manager you can disable the Fax Manager and Voicemail Manager.