

BT Business My Account User Guide

Introduction

We know how important access to the right billing information at the right time is for your business. That's why we're changing how you view and analyse your BT Business bills.

With Analyse Charges as part of My Account, your new online portal, you'll be in the driving seat. We're giving you full control of the reports you run and the information you see.

You'll have all the information you had access to in BT Analyst Converge, just with more flexibility and control.

My Account User Guide

This guide will help you get up and running with how to access and use My Account, your new BT Business online portal as well as an in depth look at Analyse Charges which replaces Analyst Converge.

We'll also walk you through how to run the most popular reports (that customers use in BT Analyst Converge) using Analyse Charges.

Key differences. BT Analyst Converge & My Account

There are a couple of key differences when using My Account and Analyse Charges compared to Analyst converge that we wanted to highlight in this guide, to make sure you feel at home as soon as possible.

- 1. How you access Analyse Charges. We've included a dedicated section on setting up My Account for the first time below.
- 2. Downloading a CSV report and using the filter options (e.g. products, costs, charge type) to tailor the report so it contains only the data that's best for your business.



How to set up and access My Account

Okay, let's get set up.

Make sure you've got the following bits of information to hand. These will have been sent to you either in your welcome email from **noreply@bt.com** or your email from **btacmigrations@bt.com**

Don't forget to check your Junk/Spam folders if you don't see them in your Inbox:

Username – email address currently used to log into BT Analyst Converge.

Temporary password – included in your welcome email from **noreply@bt.com** (you can change it once you're activated and logged into My Account).

One-off code – included in your email from **btacmigrations@bt.com**. Once you've got these, follow the quick steps on the next page to activate My Account:



How to set up and access My Account

- 1. Click the **Sign into My Account** link in your welcome email.
- 2. Enter your username and temporary password.
- 3. Enter your one-off code included in your email from btacmigrations@bt.com.
- 4. Set up an **eight-digit security number**, in case you ever forget your username or password.
- 5. Choose your **new password**. It needs to include an uppercase letter, a lowercase letter and a number. Be between 8 and 16 characters. Symbols such as ! £ & will help make your password more secure.

And that's it. Your account is active and you're ready to explore My Account.



Existing My Account users

If you're an existing My Account user, simply log in as usual and head over to your main **Billing** page.

Click on the **Analyse** dropdown from the top navigation bar and choose **Analyse charges.**

This is where you'll be able to find all the same information that you accessed in BT Analyst Converge.



Billing overview

My Account is a powerful tool for billing. It will help you take control of your BT Business bills, and help you analyse your charges in a way that works for you.

You'll have 24/7 access to all your bills. You can make online payments, set up Direct Debits. You'll also have the ability to view and download bills which are HM Revenue & Customs approved for tax purposes from the past 26 months.

You'll be able to view usage across all of your services, and with Analyse Charges, you can deep dive into all your bills and usage data.



Analyse Charges overview

In My Account you'll have **summary** or **detailed reports** for all your services allowing you to filter out the information you don't need.

From your main Billing page, click on the **Analyse** dropdown and choose **Analyse charges**. This is where you'll be able to find all the same information that you accessed in BT Analyst Converge.

Analyse Charges is separated into three tabs **Overview**, **Summary Reports and Usage Reports**.



Analyse Charges overview

Overview: A high-level, visual breakdown of your latest bill/s.

Broken down by charge types e.g. Regular charges, usage, one-off charges, adjustments, discounts. You have the option to toggle VAT off and on here as well.

Summary reports: View online or download reports.

By default, you'll always see your **Summary by service** report in the table on this page. This is a summary of your services and charges for a selected invoice. You can download as a PDF or CSV and print this summary.

There are also several ready-made reports available under **Choose your reports** such as the **Bills by service number** report and **Charges by type** reports. Have a look around and see what works best for you.



Analyse Charges overview

Usage reports: View online or download reports relating to usage charges.

By default, you'll always see your **Total usage by service number**, a summarised report of your services and charges broken down by usage type (international calls, mobile calls, Premium number for example).

Again, you can download as PDF or CSV and print this summary report.

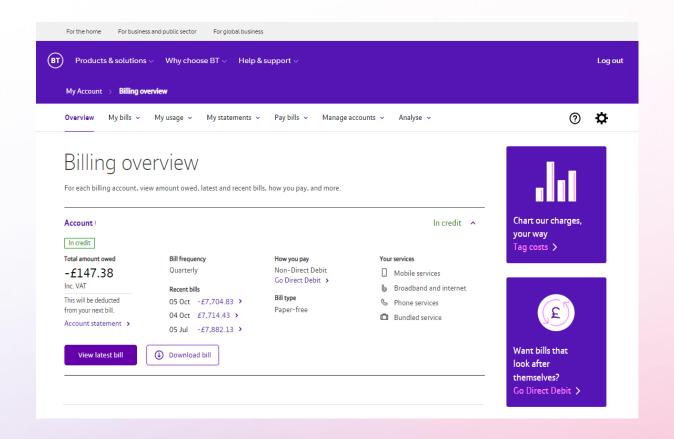
There are also several ready-made reports available under **Choose your reports**.



Popular Reports.

We've included step by step instructions for the most popular reports that customers have used in BT Analyst Converge and how you will now access the same information in Analyse Charges.



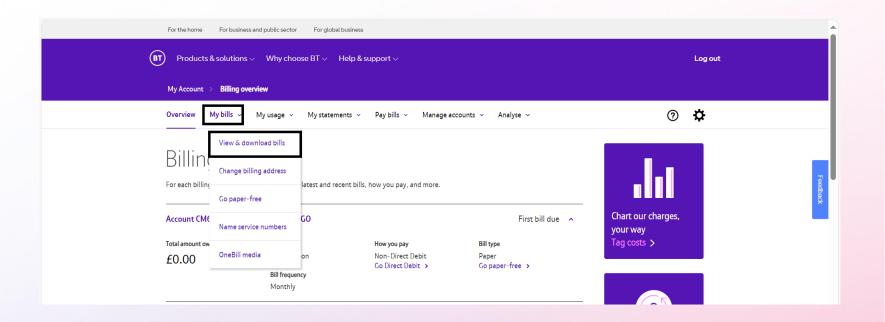


How to download your current bill in My Account

Billing overview page

- From your My Account dashboard, choose Billing from the navigation bar.
- You'll land on your Billing overview, from here you can choose the relevant account and download your latest bill.

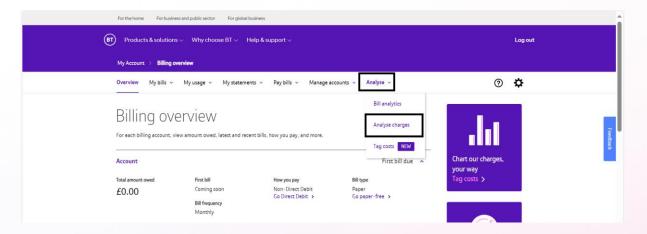


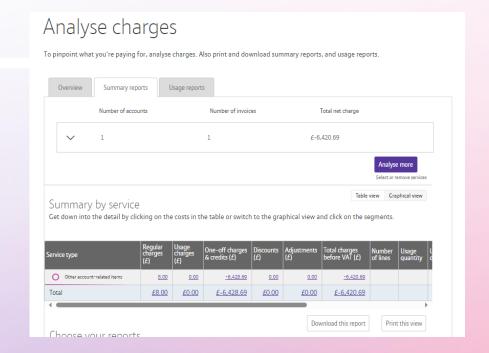


How to download older bills in My Account:

- From the My bills
 dropdown menu, select
 View & download bills as
 shown.
- Here you can choose to view your bills online or download bills either as a CSV or a PDF file.



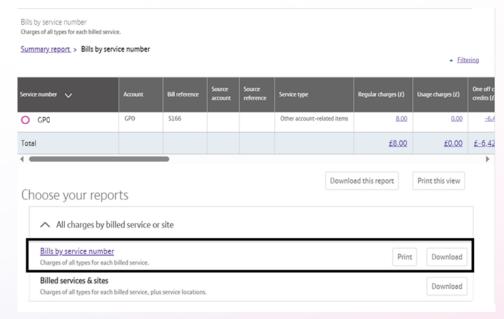




How to analyse bills in Analyse Charges

- From the Analyse
 dropdown menu, select
 Analyse charges as
 shown.
- In Analyse charges you'll
 have a default Summary
 by service report with
 your latest bill
 information in. You can
 see a high-level summary
 of your services here.



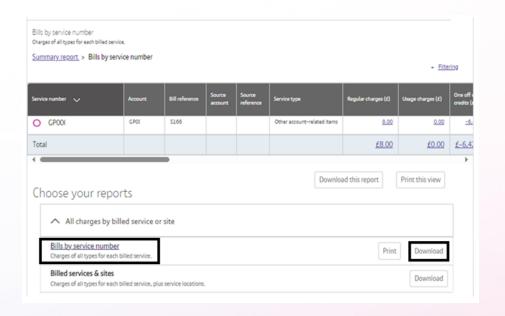


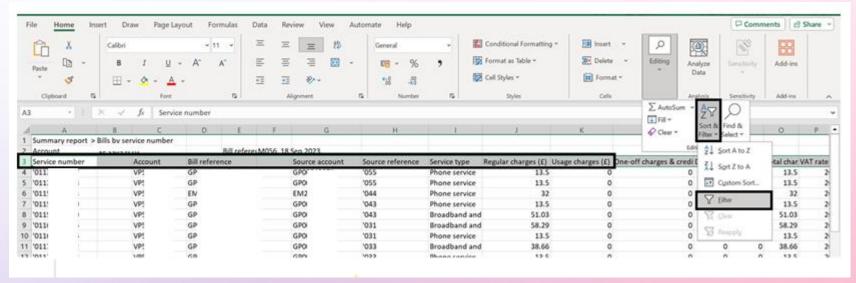
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Choosing your report type and format:

- your reports section where you can select the report type and format.
- Clicking the link for the report (e.g.) Bills by service number will present an online summary view.
- Clicking the Download button for Bills by service number will generate a CSV file to see all the information held at a service level.



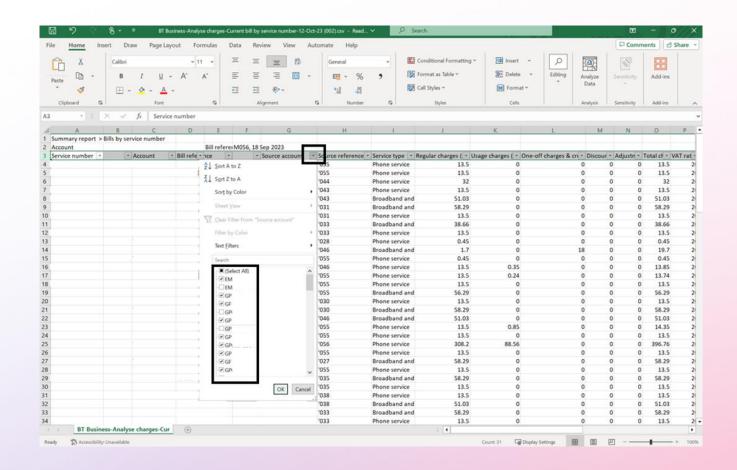




Applying filters to the CSV file:

- For full detail, download the CSV file from the option shown.
- To sort the data according to your needs, apply filters by opening the CSV file and clicking on the row that contains the title headers for the columns.
- Select **Sort & Filter**, then **Filter**.





Applying filters to the CSV file:

- After applying Sort & Filters, the columns within the CSV file will now contain dropdown arrows for each column
- Using the dropdown, you'll be able to refine the filter options further by using the tick boxes, selecting the values that you want to view in the selected column of the CSV file then click OK.
- Any values not ticked for selection wont appear in the filtered CSV.

Analyst Converge vs Analyse Charges.

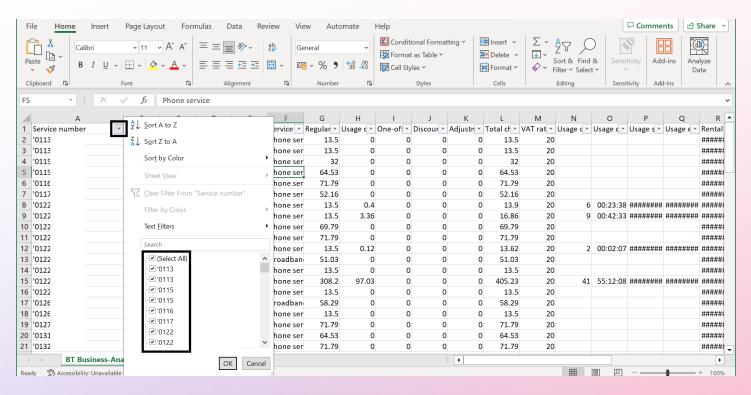
Let's take a walk through how to run the most popular reports (that customers use in BT Analyst Converge) using Analyse Charges ...



BT Analyst Converge report name: Bills by service number

Where to find in My Account: Bills by service number report





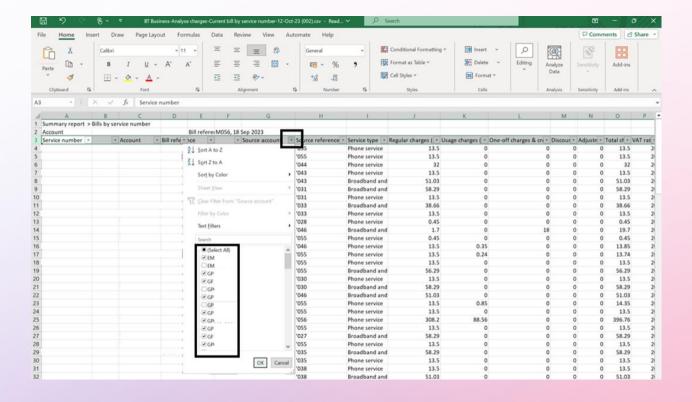
- To view charges according to the service number in Analyse Charges you will first Download a copy of the Bills by service number report.
- Once downloaded, apply Sort & Filters (as previously shown) and click the dropdown arrow next
 Service number in the CSV file to view all of the data it contains.
- Using the tick boxes, select which numbers you want to see and click **OK**.



BT Analyst Converge report name: Bills by Source account

Where to find in My Account: Bills by service number report





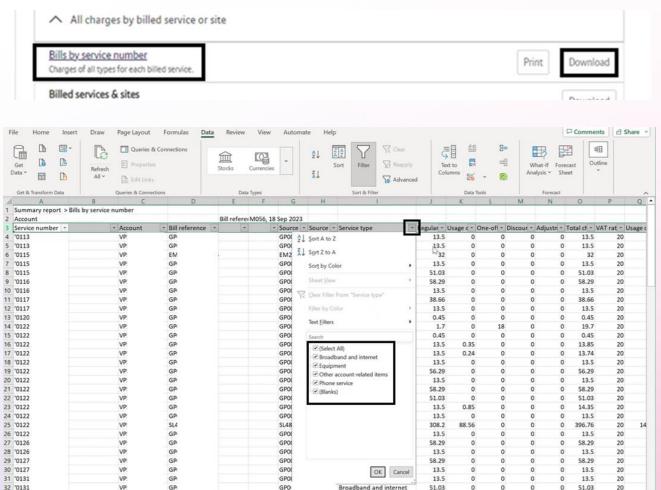
- To view charges according to source account in Analyse Charges you will first

 Download a copy of the Bills by service number report.
- Once downloaded, apply Sort & Filters (as previously shown) and click the dropdown arrow next
 Source account in the CSV file to view all of the data it contains.
- Using the tick boxes, select which accounts you want to see and click **OK**.



BT Analyst Converge report name: Bills by Service

Where to find in My Account: Bills by service number report



- To view charges according to service (e.g. Broadband, Telephony or Mobile) in Analyse Charges you will first Download a copy of the Bills by service number report.
- Once downloaded, apply Sort & Filters (as previously shown) and click the dropdown arrow next to
 Service type in the CSV file to view all of the data it contains.
- Using the tick boxes, select which services you want to see and click **OK**.

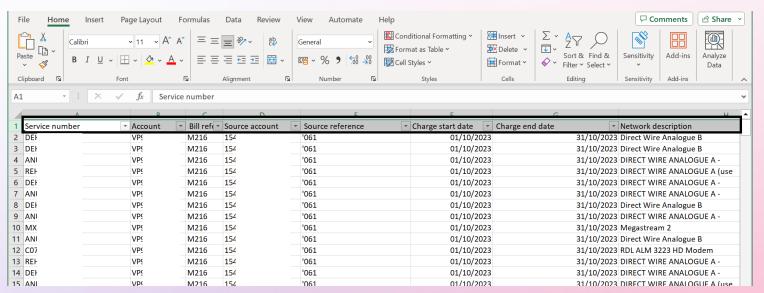
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BT Analyst Converge report name: Bills by service - Private Circuit

Where to find in My Account: Data and Voice Network report



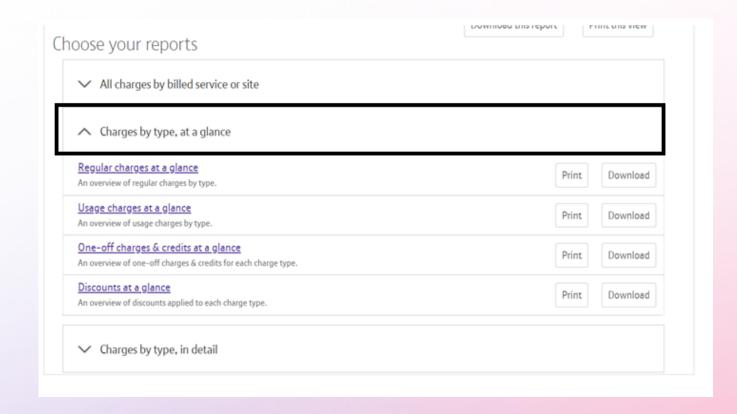


- The information provided in your Private Circuit report is different to the rest of our products and services, so we've created a standalone
 Data and Voice Network report.
- You can access this report within the All charges by billed service or site
- Once downloaded, you can apply Sort & Filters (as previously shown) and click the dropdown arrows next to columns in the CSV file to view and refine the data in the file.



BT Analyst Converge report name: Non usage charges

Where to find in My Account: Summary by service, Charges by type, at a glance.

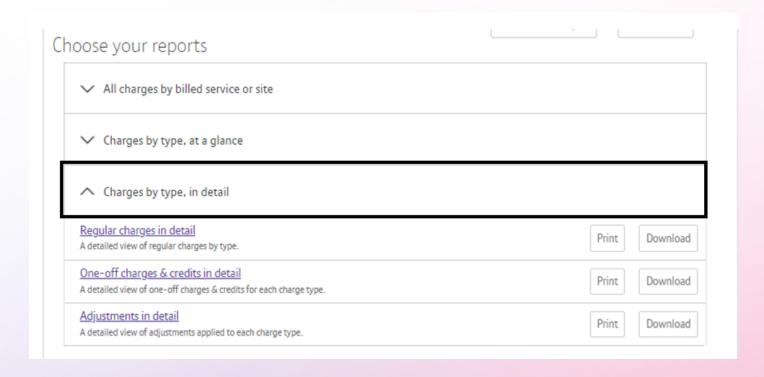


• In the Charges by type, at a glance category you can view and download reports for non-usage charges such regular charges (rental), one-off charges & credits and discounts.



BT Analyst Converge report name: Non usage charges

Where to find in My Account: Summary by service, Charges by type, in detail.

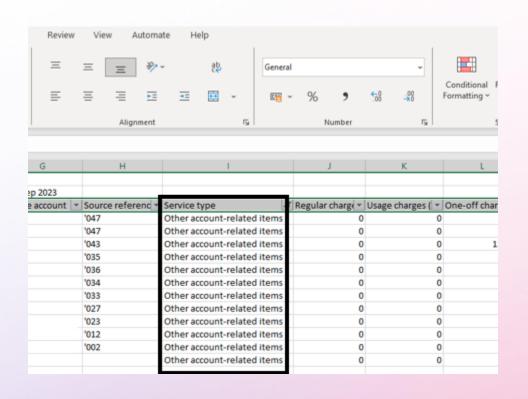


• In the Charges by type in detail category you can see a more detailed view of non usage charges such as regular charges (rental), one-off charges & credits and adjustments.



BT Analyst Converge report name: Internet Teleworker, SIP, Account Level, Concert Classic, BT Syncordia, OpenZone, Advanced Services, VOIP and BT Conferencing

Where to find in My Account: All reports



- We've combined these product in View My OneBill in My Account.
- Information relating to these products is found by applying Sort & filters then filtering out all options except Other account related items in any of our Analyse Charges reports.

Help & Support

We have lots of help and support available for our customers.

You can find all the information to help you with any of your BT Business billing needs over at:

BT Business billing | Help & support | BT Business

Here are a couple of Help articles to help you get up and running with your Cost Centres and viewing your call usage:

Tagging costs: What is tagging and how do I use it? | BT Business

Viewing call usage: Viewing your call usage | Help | BT Business



