



How to Use Guide: Understanding a Company Structure

Last updated 3/29/2011

Overview

Creating a Company Structure allows you to organize accounts based on the way your company is setup, for example, by department, cost center, or geography. Once the Company Structure has been created, you can assign mobile telephone numbers, account numbers, and company users. For example, you could assign responsibility for the Marketing portion of the Company Structure to someone from your Marketing department.

Note: Company Structures do not change the association of a wireless number with its account in the billing system. Instead, a Company Structure helps you view your charges in a way that is more meaningful to you and your company users. By matching your Company Structure to your organization, statement viewing and analysis become more meaningful. In addition, mobile numbers and accounts can be assigned to only one folder within the Company Structure.

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Benefits of a Company Structure

- Allows you to trigger access and run reports using a single structure
- Reduces management of multiple structures
- Improves the wireless number assignment process
- Communicates the quantity of unassigned mobile numbers
- Offers a download and upload process
- Can be reported against in the Reports tab

Company Structure versus Billing Structure

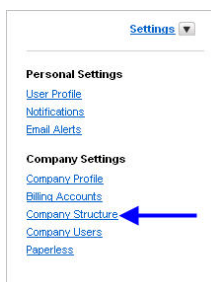
The Billing Structure is what Verizon Wireless uses to manage your wireless account(s). Billing Structure is an option that allows you to grant account access to additional users in your company at the account level. A Company Structure option enables you to separate the wireless number from the bill account level, organize mobile numbers into folders, and subsequently grant access to additional users in your company.

Creating a Company Structure

1. Click on the **“Settings”** dropdown.



2. Go to the **“Company Structure”** page.





3. Enter a name and optional description for the Company Structure.

Create a new Company Structure.

Name:

Description:

Create **Clear**

4. Click on the “**Create**” button to create the new Company Structure.

Create a new Company Structure.

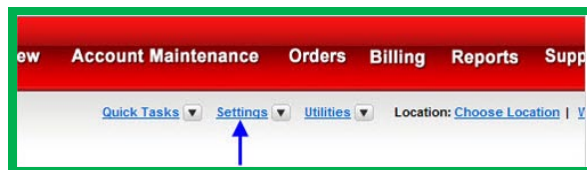
Name:

Description:

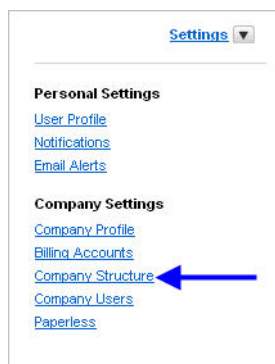
Create **Clear**

Editing a Company Structure

1. Click on the “**Settings**” dropdown.



2. Go to the “**Company Structure**” page.





3. On the left side of the “**Edit Company Structure**” screen, **click the structure** you want to edit.

Search

+ [ABC Company](#)

Name:

Description:

4. Make the desired changes to the “**Name**” and/or “**Description**.”

Search

+ [ABC Company](#)

Name:

Description:

5. Click the “**Update**” button.

Search

+ [ABC Company](#)

Name:

Description:

6. Your screen will refresh to the “Edit Company Structure” page. To confirm your change, click on the [insert round plus sign screenshot] to go to the “Company Structure Details” page. Your change should appear under the “Details” tab.



ABC Company

Details Users Folders Accounts Lines and Services

Name:
ABC Company

Location:
ABC Company

Description:

Uploading a Company Structure

You would upload a Company Structure when:

- You are creating a new Company Structure where none existed before.
- You are completely replacing an existing Company Structure. Uploading a new Company Structure will overwrite an existing Company Structure.

Note: Only the Primary Contact and Administrator roles have access to upload a Company Structure.

Creating an upload template

Before uploading a Company Structure, you must create the upload file. Refer to the following information and the sample templates below when creating the upload file.

- The first five rows need to be in the exact format as in the template.
- Element names (e.g., "FOLDER," "MTN") are case sensitive.
 - MTN = Mobile Telephone Number (your wireless number)
- Hierarchy Name (Cell A1) must match column B throughout the file.
- There cannot be any blank cells between items within a row.
- Before you can assign an "MTN" or "ACCOUNT" to a folder, you must always have a "FOLDER" row with no assignments to it.
- Special characters (e.g., "?," "&," "%," "/" and "\") are not allowed in folder names.
- MTNs are not allowed in top level "FOLDER."
- The file must be saved and uploaded in .CSV format.
- Maximum file size is 2 MB.

Sample upload template without users

Refer to this upload template (https://b2b.vzw.com/support/pdf/CS_upload_template_withoutusers%2012.28.xls) as a reference when creating your Company Structure upload file without users. You will need to manually assign users after the Company Structure has uploaded.

Sample upload template with users

Refer to this upload template (https://stage-b2b.vzw.com/support/pdf/CS_upload_template_withuser%2012.28.xls) as a reference when creating your Company Structure upload file with user information.



Understanding the upload file

This section provides a detailed explanation of the Company Structure upload file and is recommended for technically proficient users.

Note: This guide references a sample upload file with a structure that has worked for other companies. Yours may be structured differently.

Rows 1-5

Rows 1-5 must be formatted according to the following specs:

- Row 1: must contain the phrase "Hierarchy Name:" including the colon, followed by the name of the Company Structure.
- Row 2: must contain the phrase "Type: Business Hierarchy."
- Row 3: must contain the word "Date:" including the colon, followed by the date/time formatted "MM/DD/YYYY HH:MM AM."
- Row 4: must be blank.
- Row 5: must contain the phrase "NodeType" with this exact formatting.

	A	B	C	D	E	F
1	Hierarchy Name: ABC Company					
2	Type: Business Hierarchy					
3	Date: 11/27/2007 08:57 AM					
4						
5	NodeType					
6	FOLDER	ABC Company				
7	FOLDER	ABC Company	US			
8	FOLDER	ABC Company	Unassigned			
9	FOLDER	ABC Company	Canada			
10	FOLDER	ABC Company	US	West		
11	FOLDER	ABC Company	US	East		
12	FOLDER	ABC Company	US	West	Marketing	
13	FOLDER	ABC Company	US	West	Sales	
14	MTN	ABC Company	US	123-555-4567		
15	MTN	ABC Company	US	123-555-6789		
16	MTN	ABC Company	Unassigned	123-555-4321		
17	MTN	ABC Company	Unassigned	123-555-9876		
18	MTN	ABC Company	US	123-555-1234		
19	MTN	ABC Company	Unassigned	123-555-5555		
20	MTN	ABC Company	Unassigned	123-456-7890		
21	MTN	ABC Company	US	West	Marketing	123-555-7777
22	MTN	ABC Company	Unassigned	123-555-1231		
23	MTN	ABC Company	Unassigned	123-555-6543		
24	MTN	ABC Company	Unassigned	123-555-0000		
25	MTN	ABC Company	Unassigned	123-123-1234		
26	MTN	ABC Company	Unassigned	123-123-9876		
27	ACCOUNT	ABC Company	US	West	Marketing	12345789-00002
28	ACCOUNT	ABC Company	Unassigned	123456789-00004		
29	USER	ABC Company	US	CSHTUG		
30						



Folders

Rows 6-13 in this sample file contain the Company Structure folders.

Note: All folders must contain "FOLDER" in column A.

- Row 6 contains the root Company Structure folder.

	A	B	C	D	E
1	Hierarchy Name: ABC Company				
2	Type: Business Hierarchy				
3	Date: 11/27/2007 08:57 AM				
4					
5	NodeType				
6	FOLDER	ABC Company			
7	FOLDER	ABC Company	US		
8	FOLDER	ABC Company	Unassigned		
9	FOLDER	ABC Company	Canada		
10	FOLDER	ABC Company	US	West	
11	FOLDER	ABC Company	US	East	
12	FOLDER	ABC Company	US	West	Marketing
13	FOLDER	ABC Company	US	West	Sales
14	MTN	ABC Company	US	786-385-8566	
15	MTN	ABC Company	US	786-385-8697	
16	MTN	ABC Company	Unassigned	786-385-8792	
17	MTN	ABC Company	Unassigned	786-385-8922	
18	MTN	ABC Company	US	786-385-9029	
19	MTN	ABC Company	Unassigned	786-385-9111	
20	MTN	ABC Company	Unassigned	786-390-8063	
21	MTN	ABC Company	US	West	Marketing 786-390-8345
22	MTN	ABC Company	Unassigned	786-877-3433	
23	MTN	ABC Company	Unassigned	786-877-3746	
24	MTN	ABC Company	Unassigned	786-877-5542	
25	MTN	ABC Company	Unassigned	786-877-6885	
26	MTN	ABC Company	Unassigned	786-877-7463	
27	ACCOUNT	ABC Company	US	West	Marketing 920016336-00002
28	ACCOUNT	ABC Company	Unassigned	920016336-00004	
29	USER	ABC Company	US	CSHTUG	
30					
31					



- Rows 7-9 contain the Level One folders.

	A	B	C	D	E
1	Hierarchy Name: ABC Company				
2	Type: Business Hierarchy				
3	Date: 11/27/2007 08:57 AM				
4					
5	NodeType				
6	FOLDER	ABC Company			
7	FOLDER	ABC Company	US		
8	FOLDER	ABC Company	Unassigned		
9	FOLDER	ABC Company	Canada		
10	FOLDER	ABC Company	US	West	
11	FOLDER	ABC Company	US	East	
12	FOLDER	ABC Company	US	West	Marketing
13	FOLDER	ABC Company	US	West	Sales
14	MTN	ABC Company	US	786-385-8566	
15	MTN	ABC Company	US	786-385-8697	
16	MTN	ABC Company	Unassigned	786-385-8792	
17	MTN	ABC Company	Unassigned	786-385-8922	
18	MTN	ABC Company	US	786-385-9029	
19	MTN	ABC Company	Unassigned	786-385-9111	
20	MTN	ABC Company	Unassigned	786-390-8063	
21	MTN	ABC Company	US	West	Marketing 786-390-8345
22	MTN	ABC Company	Unassigned	786-877-3433	
23	MTN	ABC Company	Unassigned	786-877-3746	
24	MTN	ABC Company	Unassigned	786-877-5542	
25	MTN	ABC Company	Unassigned	786-877-6885	
26	MTN	ABC Company	Unassigned	786-877-7463	
27	ACCOUNT	ABC Company	US	West	Marketing 920016336-00002
28	ACCOUNT	ABC Company	Unassigned	920016336-00004	
29	USER	ABC Company	US	CSHTUG	
30					
31					

- ABC Company (3/3)
+ **Unassigned** 509
+ **Canada**
- **U.S.** (2/2)
+ **East**
- **West** (2/2)
+ **Marketing**
+ **Sales**



- Rows 10 and 11 contain Level Two or sub-folders. These sub-folders are located in the "US" folder in this sample file.

	A	B	C	D	E
1	Hierarchy Name: ABC Company				
2	Type: Business Hierarchy				
3	Date: 11/27/2007 08:57 AM				
4					
5	NodeType				
6	FOLDER	ABC Company			
7	FOLDER	ABC Company	US		
8	FOLDER	ABC Company	Unassigned		
9	FOLDER	ABC Company	Canada		
10	FOLDER	ABC Company	US	West	
11	FOLDER	ABC Company	US	East	
12	FOLDER	ABC Company	US	West	Marketing
13	FOLDER	ABC Company	US	West	Sales
14	MTN	ABC Company	US	786-385-8566	
15	MTN	ABC Company	US	786-385-8697	
16	MTN	ABC Company	Unassigned	786-385-8792	
17	MTN	ABC Company	Unassigned	786-385-8922	
18	MTN	ABC Company	US	786-385-9029	
19	MTN	ABC Company	Unassigned	786-385-9111	
20	MTN	ABC Company	Unassigned	786-390-8063	
21	MTN	ABC Company	US	West	Marketing 786-390-8345
22	MTN	ABC Company	Unassigned	786-877-3433	
23	MTN	ABC Company	Unassigned	786-877-3746	
24	MTN	ABC Company	Unassigned	786-877-5542	
25	MTN	ABC Company	Unassigned	786-877-6885	
26	MTN	ABC Company	Unassigned	786-877-7463	
27	ACCOUNT	ABC Company	US	West	Marketing 920016336-00002
28	ACCOUNT	ABC Company	Unassigned	920016336-00004	
29	USER	ABC Company	US	CSHTUG	
30					
31					



- Rows 12 and 13 contain Level Three (second level sub-folder) folders. These folders are located in the "West" sub-folder.

	A	B	C	D	E
1	Hierarchy Name: ABC Company				
2	Type: Business Hierarchy				
3	Date: 11/27/2007 08:57 AM				
4					
5	NodeType				
6	FOLDER	ABC Company			
7	FOLDER	ABC Company	US		
8	FOLDER	ABC Company	Unassigned		
9	FOLDER	ABC Company	Canada		
10	FOLDER	ABC Company	US	West	
11	FOLDER	ABC Company	US	East	
12	FOLDER	ABC Company	US	West	Marketing
13	FOLDER	ABC Company	US	West	Sales
14	MTN	ABC Company	US	786-385-8566	
15	MTN	ABC Company	US	786-385-8697	
16	MTN	ABC Company	Unassigned	786-385-8792	
17	MTN	ABC Company	Unassigned	786-385-8922	
18	MTN	ABC Company	US	786-385-9029	
19	MTN	ABC Company	Unassigned	786-385-9111	
20	MTN	ABC Company	Unassigned	786-390-8063	
21	MTN	ABC Company	US	West	Marketing 786-390-8345
22	MTN	ABC Company	Unassigned	786-877-3433	
23	MTN	ABC Company	Unassigned	786-877-3746	
24	MTN	ABC Company	Unassigned	786-877-5542	
25	MTN	ABC Company	Unassigned	786-877-6885	
26	MTN	ABC Company	Unassigned	786-877-7463	
27	ACCOUNT	ABC Company	US	West	Marketing 920016336-00002
28	ACCOUNT	ABC Company	Unassigned	920016336-00004	
29	USER	ABC Company	US	CSHTUG	
30					
31					





Wireless numbers

Rows 14-26 in this sample file contain the company's wireless numbers.

Note: All wireless numbers must contain "MTN" (Mobile Telephone Number) in Column A.

- The wireless number in row 15 is assigned to the Level One "US" folder.
- The wireless number in row 21 is assigned to the Level Three "Marketing" folder.
- The wireless number in row 24 is unassigned and can be located in the "Unassigned" folder.

	A	B	C	D	E	F
1	Hierarchy Name: ABC Company					
2	Type: Business Hierarchy					
3	Date: 11/27/2007 08:57 AM					
4						
5	NodeType					
6	FOLDER	ABC Company				
7	FOLDER	ABC Company	US			
8	FOLDER	ABC Company	Unassigned			
9	FOLDER	ABC Company	Canada			
10	FOLDER	ABC Company	US	West		
11	FOLDER	ABC Company	US	East		
12	FOLDER	ABC Company	US	West	Marketing	
13	FOLDER	ABC Company	US	West	Sales	
14	MTN	ABC Company	US	123-555-4567		
15	MTN	ABC Company	US	123-555-6789		
16	MTN	ABC Company	Unassigned	123-555-4321		
17	MTN	ABC Company	Unassigned	123-555-9876		
18	MTN	ABC Company	US	123-555-1234		
19	MTN	ABC Company	Unassigned	123-555-5555		
20	MTN	ABC Company	Unassigned	123-456-7890		
21	MTN	ABC Company	US	West	Marketing	123-555-7777
22	MTN	ABC Company	Unassigned	123-555-1231		
23	MTN	ABC Company	Unassigned	123-555-6543		
24	MTN	ABC Company	Unassigned	123-555-0000		
25	MTN	ABC Company	Unassigned	123-123-1234		
26	MTN	ABC Company	Unassigned	123-123-9876		
27	ACCOUNT	ABC Company	US	West	Marketing	123456789-00002
28	ACCOUNT	ABC Company	Unassigned	123456789-00004		
29	USER	ABC Company	US	CSHTUG		
30						



Accounts

Rows 27-28 in this sample upload file contain the company's accounts.

Note: All accounts must contain "ACCOUNT" in column A.

- The account in row 27 is located in the Level Three "Marketing" folder.
- The account in row 28 is unassigned and can be located in the "Unassigned" folder.

	A	B	C	D	E	F
1	Hierarchy Name: ABC Company					
2	Type: Business Hierarchy					
3	Date: 11/27/2007 08:57 AM					
4						
5	NodeType					
6	FOLDER	ABC Company				
7	FOLDER	ABC Company	US			
8	FOLDER	ABC Company	Unassigned			
9	FOLDER	ABC Company	Canada			
10	FOLDER	ABC Company	US	West		
11	FOLDER	ABC Company	US	East		
12	FOLDER	ABC Company	US	West	Marketing	
13	FOLDER	ABC Company	US	West	Sales	
14	MTN	ABC Company	US	123-555-4567		
15	MTN	ABC Company	US	123-555-6789		
16	MTN	ABC Company	Unassigned	123-555-4321		
17	MTN	ABC Company	Unassigned	123-555-9876		
18	MTN	ABC Company	US	123-555-1234		
19	MTN	ABC Company	Unassigned	123-555-5555		
20	MTN	ABC Company	Unassigned	123-456-7890		
21	MTN	ABC Company	US	West	Marketing	123-555-7777
22	MTN	ABC Company	Unassigned	123-555-1231		
23	MTN	ABC Company	Unassigned	123-555-6543		
24	MTN	ABC Company	Unassigned	123-555-0000		
25	MTN	ABC Company	Unassigned	123-123-1234		
26	MTN	ABC Company	Unassigned	123-123-9876		
27	ACCOUNT	ABC Company	US	West	Marketing	12345789-00002
28	ACCOUNT	ABC Company	Unassigned	123456789-00004		
29	USER	ABC Company	US	CSHUG		
30						



Users

Row 29 in this sample upload file contains a company user.

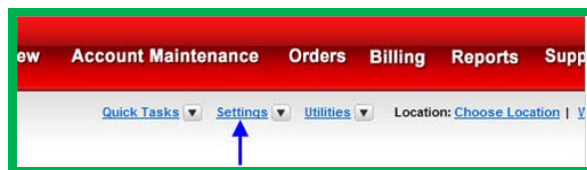
Note: All users must contain "USER" in column A and must be identified by their user ID.

- The user in row 29, with user ID CSHTUG, is assigned to the "US" folder.

	A	B	C	D	E	F
1	Hierarchy Name: ABC Company					
2	Type: Business Hierarchy					
3	Date: 11/27/2007 08:57 AM					
4						
5	NodeType					
6	FOLDER	ABC Company				
7	FOLDER	ABC Company	US			
8	FOLDER	ABC Company	Unassigned			
9	FOLDER	ABC Company	Canada			
10	FOLDER	ABC Company	US	West		
11	FOLDER	ABC Company	US	East		
12	FOLDER	ABC Company	US	West	Marketing	
13	FOLDER	ABC Company	US	West	Sales	
14	MTN	ABC Company	US	123-555-4567		
15	MTN	ABC Company	US	123-555-6789		
16	MTN	ABC Company	Unassigned	123-555-4321		
17	MTN	ABC Company	Unassigned	123-555-9876		
18	MTN	ABC Company	US	123-555-1234		
19	MTN	ABC Company	Unassigned	123-555-5555		
20	MTN	ABC Company	Unassigned	123-456-7890		
21	MTN	ABC Company	US	West	Marketing	123-555-7777
22	MTN	ABC Company	Unassigned	123-555-1231		
23	MTN	ABC Company	Unassigned	123-555-6543		
24	MTN	ABC Company	Unassigned	123-555-0000		
25	MTN	ABC Company	Unassigned	123-123-1234		
26	MTN	ABC Company	Unassigned	123-123-9876		
27	ACCOUNT	ABC Company	US	West	Marketing	12345789-00002
28	ACCOUNT	ABC Company	Unassigned	123456789-00004		
29	USER	ABC Company	US	CSHTUG		
30						

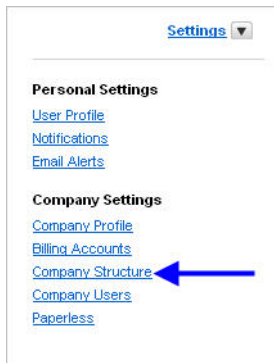
Uploading the Company Structure file

- Click on the "Settings" dropdown.

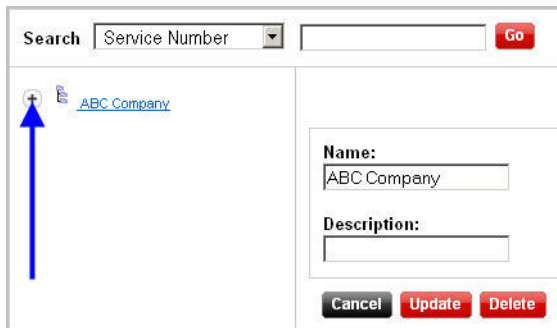




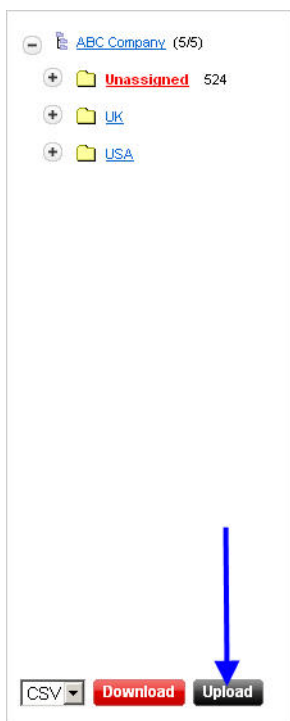
2. Go to the “**Company Structure**” page.



3. Click the “+” next to the Company Structure.



4. Click the **“Upload”** button.

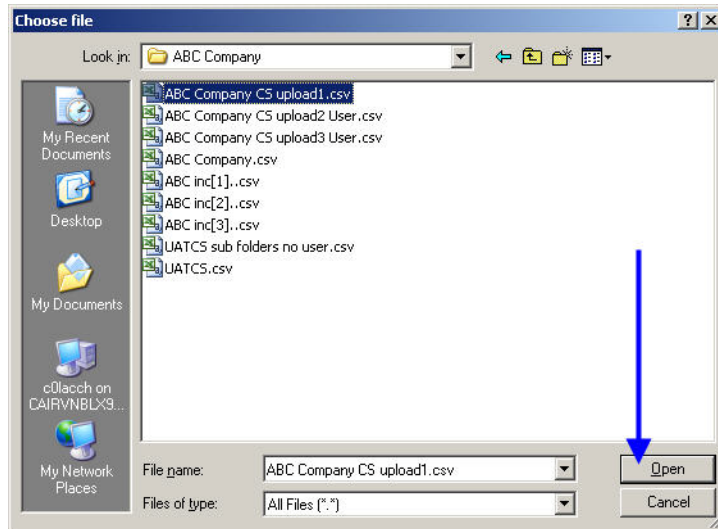


5. Click the **“Browse”** button. A “Select File” pop-up screen will appear.



6. **Select the file** that contains the structure to be uploaded, and then click the **“Open”** button.

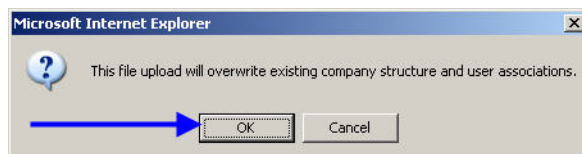
Note: The upload file must be .CSV format.



7. Click the **“Upload”** button.



8. Click **“OK”** to continue. You have now successfully uploaded the Company Structure file.





Downloading a Company Structure

A Company Structure can be downloaded, enabling you to edit the file and re-upload an updated Company Structure. You can either upload a Company Structure without users or one with users already assigned.

Downloading a Company Structure without users

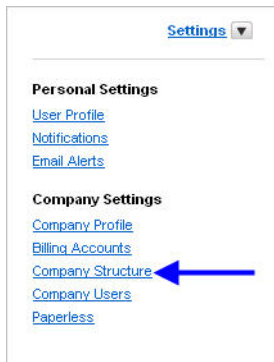
This download will contain up to 20,000 accounts and wireless numbers.

Note: For a file that contains the entire Company Structure, see the “Downloading a Company Structure with Users” section.

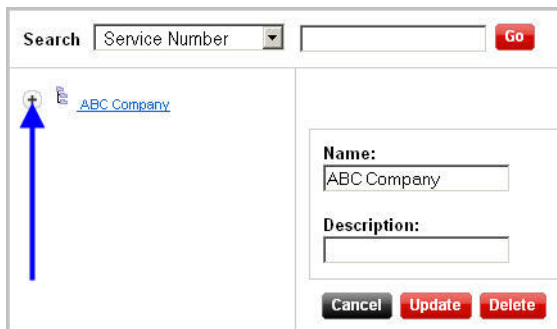
1. Click on the **“Settings”** dropdown.



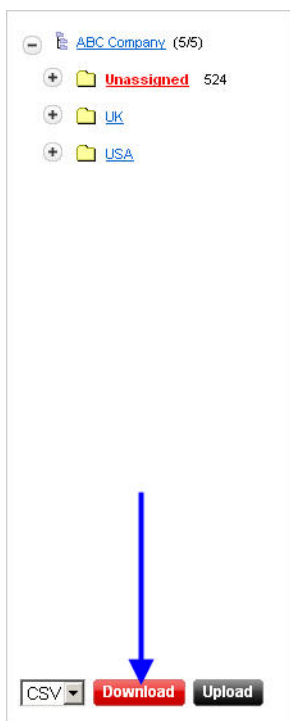
2. Go to the **“Company Structure”** page.



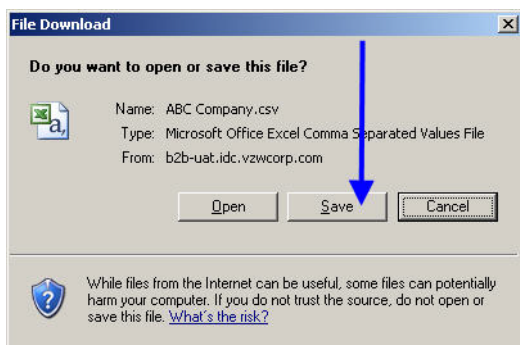
3. Click the **“+”** next to the Company Structure you want to download.



4. Click the **Download** button.

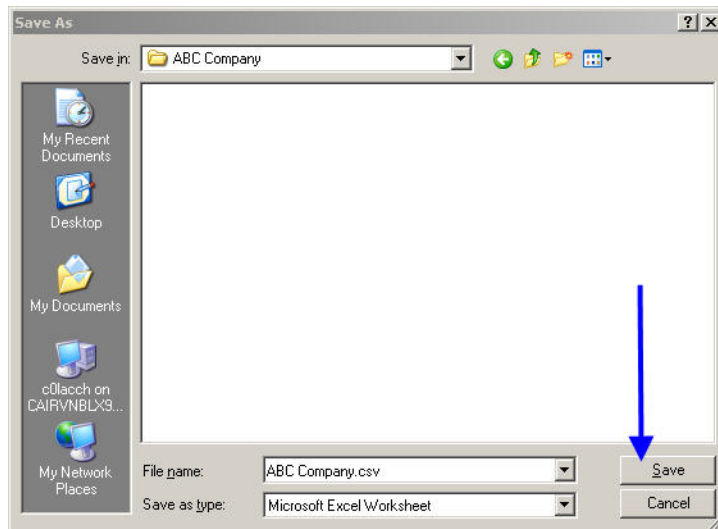


5. The **File Download** pop-up will appear. Click **Save.**





6. The “Save As” window will display. **Choose the file location**, and click “**Save**.” You have now successfully downloaded the Company Structure file.



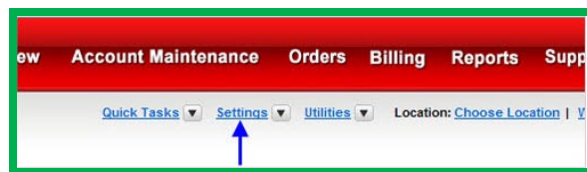
Downloading a Company Structure with users

This batch download contains all accounts and wireless numbers in addition to user information.

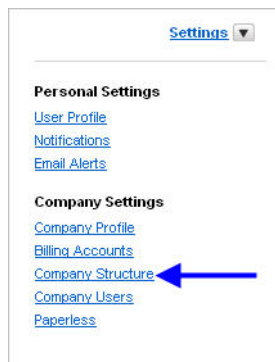
To download this batch file you must first create a request for a batch download. Any changes made to the Company Structure after this request begins to process will not be reflected in the download.

Creating a request for a batch download

1. Click on the “**Settings**” dropdown.



2. Go to the “**Company Structure**” page.





3. Click the “+” next to the Company Structure you want to download.

Search Service Number

☐ + [ABC Company](#)

Name:

Description:

4. Click the “**Create**” button to begin creating the batch download.

ABC Company

Details Users Folders Accounts Lines and Services

Name:
ABC Company

Location:
ABC Company

Description:

To request a special batch download with the assigned users included, click on the create button below. Any changes to the Company Structure after the batch job begins to process the request will not be reflected in the download.

Download Status: Download not created

5. When the confirmation screen appears, click “**Create**.” The request has been submitted. You will be notified via email when the batch Company Structure is ready for download.

ABC Company

Create Company Structure Download with Users

Are you sure? Requesting a Company Structure Download with Users will disable the ability to perform any updates on the company structure until the download is complete.

Do you wish to continue?

Note: The batch process runs three times a day (Pacific Standard Time): 9 a.m., 1 p.m. and 4 p.m. For example, if you create the request at 4:30 p.m., the batch process will not begin until 9 a.m. the next day. Depending on the size of the Company Structure, the batch process may take up to one day to process.

Downloading the batch file

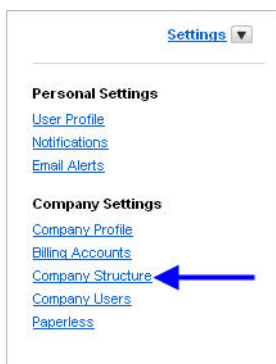
1. Click on the “**Settings**” dropdown.

ew Account Maintenance Orders Billing Reports Supp

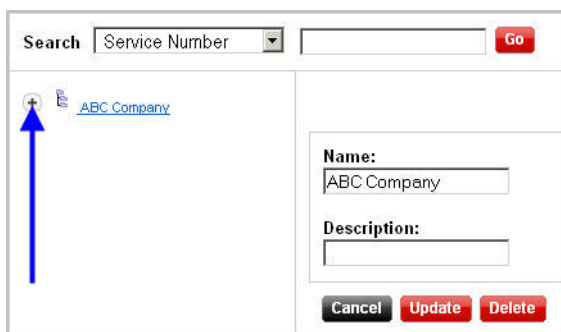
[Quick Tasks](#) [Settings](#) [Utilities](#) Location: [Choose Location](#) | [V](#)



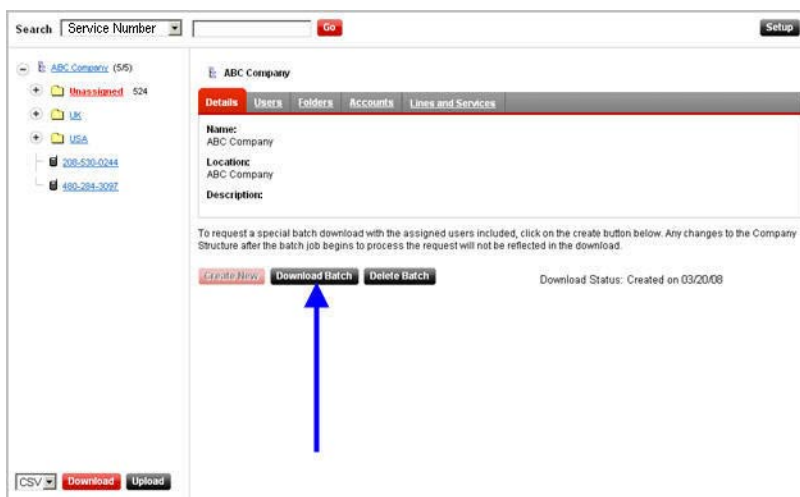
2. Go to the “**Company Structure**” page.



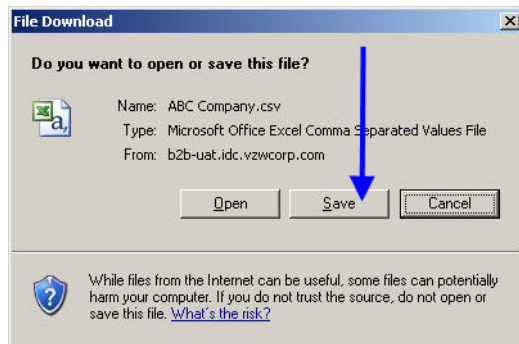
3. Click the “+” next to the Company Structure you want to download.



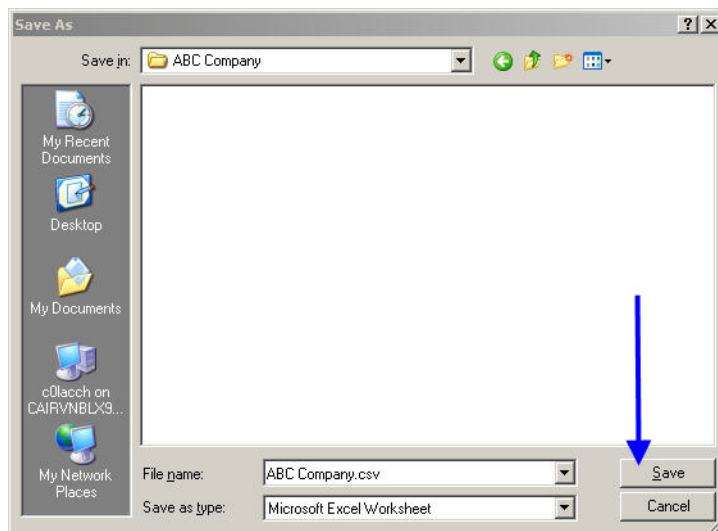
4. Click the “**Download Batch**” button in the pane on the right.



5. The “File Download” pop-up will appear. Click “Save.”



6. The “Save As” window will display. Click “Save.” You have now successfully downloaded the Company Structure with user assignments.





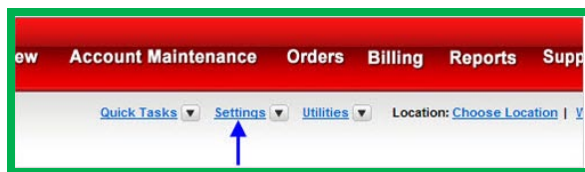
User maintenance

Once a Company Structure has been created, all users are automatically placed in the “Unassigned” folder. Users can be assigned to the entire Company Structure or to specific folders within the Company Structure.

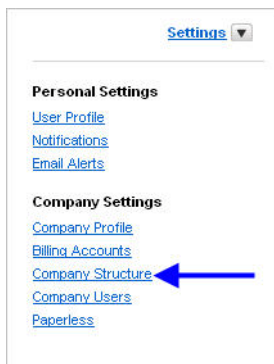
Assigning a user to the Company Structure

Assigning a user to a Company Structure gives the user access to the entire structure when logged into My Business Account.

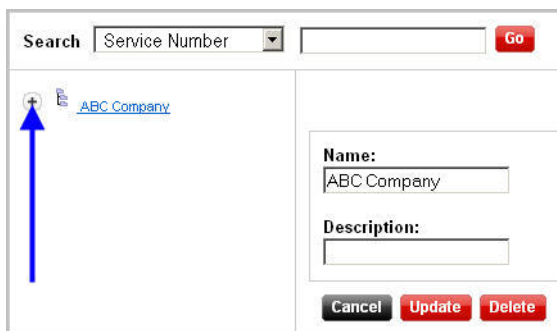
1. Click on the “**Settings**” dropdown.



2. Go to the “**Company Structure**” page.



3. Click the “+” next to the Company Structure.





4. Go to the “Users” tab.

ABC Company

Details Users Folders Accounts Lines and Services

Name: ABC Company
Location: ABC Company
Description:

To request a special batch download with the assigned users included, click on the create button below. Any changes to the Company Structure after the batch job begins to process the request will not be reflected in the download.

Create New Download Batch Delete Batch

Download Status: Created on 03/20/08

5. Select “Unassigned” in the “View” dropdown menu.

ABC Company

Details Users Folders Accounts Lines and Services

View: Assigned Assigned Unassigned

Filter: First Name

Refresh

Art Oshinson
rajesh akula
rajesh akula
rajesh akula
satya kante
satya kante
test tester
test tester
test tester

9 (of 9) records returned.

Select All Deselect All Unassign

6. Click the “Refresh” button. A list of unassigned users will appear.

ABC Company

Details Users Folders Accounts Lines and Services

View: Unassigned Filter: First Name

Refresh

Art Oshinson
rajesh akula
rajesh akula
rajesh akula
satya kante
satya kante
test tester
test tester
test tester

9 (of 9) records returned.

Select All Deselect All Unassign



7. Check the box next to the user(s) you want to assign to the Company Structure.

ABC Company

Details Users Folders Accounts Lines and Services

View: Unassigned Filter: First Name Refresh

☐ Test Tester
☒ View Only

2 (of 2) records returned.

Select All Deselect All Assign

8. Click the "Assign" button.

ABC Company

Details Users Folders Accounts Lines and Services

View: Unassigned Filter: First Name Refresh

☐ Test Tester
☒ View Only

2 (of 2) records returned.

Select All Deselect All Assign

9. A list of the users assigned to the Company Structure will appear.

ABC Company

Details Users Folders Accounts Lines and Services

View: Assigned Filter: First Name Refresh

☐ Art O
☐ View Only
☐ rajesh
☐ rajesh
☐ rajesh
☐ satya k
☐ satya k
☐ test tester

10 (of 10) records returned.

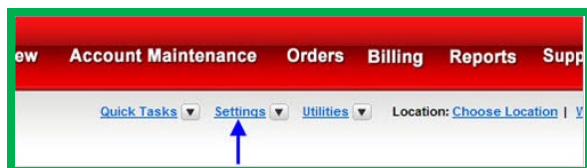
Select All Deselect All Unassign



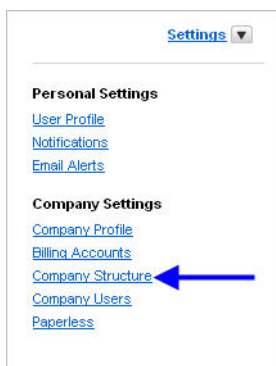
Assigning a user to a folder

Assigning a user to a folder allows access to only the folders that have been assigned to that user.

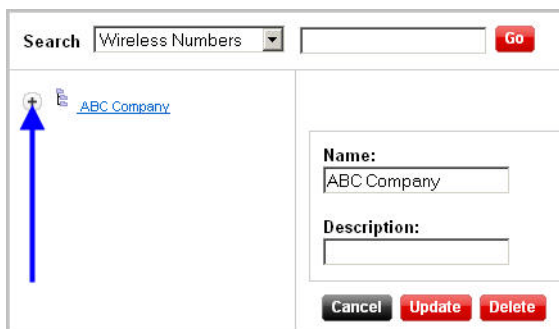
1. Click on the **“Settings”** dropdown.



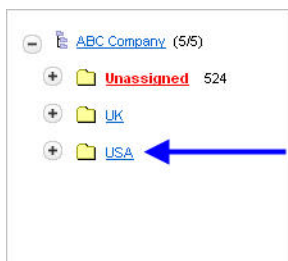
2. Go to the **“Company Structure”** page.



3. Click the **“+”** next to the Company Structure.



4. Click on the folder you will be assigning the user.





5. Go to the “Users” tab.

USA

Details Users Folders Accounts Lines and Services

Name: USA

Location: ABC CompanyUSA

Description: USA

Cancel Update Delete

6. Select “Unassigned” in the “View” dropdown menu.

USA

Details Users Folders Accounts Lines and Services

View: Assigned Assigned Unassigned

No use

Refresh

0 (of 0) records returned.

7. Click “Refresh.” A list of unassigned users will appear.

USA

Details Users Folders Accounts Lines and Services

View: Unassigned Filter: First Name

Test Tester

1 (of 1) records returned.

Select All Deselect All Assign



8. Check the box next to the user(s) you want to assign to this folder.

USA

Details Users Folders Accounts Lines and Services

View: Unassigned Filter: First Name Refresh

<input checked="" type="checkbox"/>	Test Tester
-------------------------------------	-------------

1 (of 1) records returned.

Select All Deselect All Assign

9. Click the "Assign" button.

USA

Details Users Folders Accounts Lines and Services

View: Unassigned Filter: First Name Refresh

<input checked="" type="checkbox"/>	Test Tester
-------------------------------------	-------------

1 (of 1) records returned.

Select All Deselect All Assign

10. The folder will display the assigned user(s).

USA

Details Users Folders Accounts Lines and Services

View: Assigned Filter: First Name Refresh

<input type="checkbox"/>	Test Tester
--------------------------	-------------

1 (of 1) records returned.

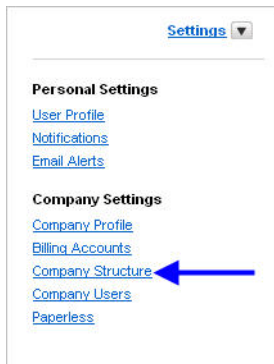
Select All Deselect All Unassign

Unassigning a user

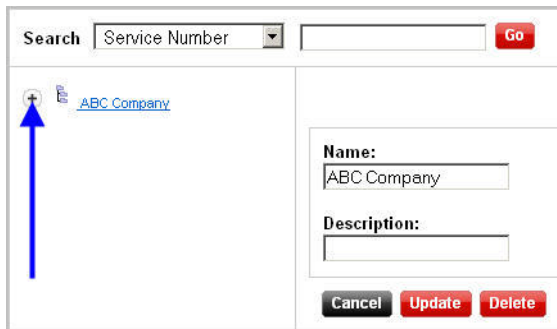
1. Click on the “**Settings**” dropdown.



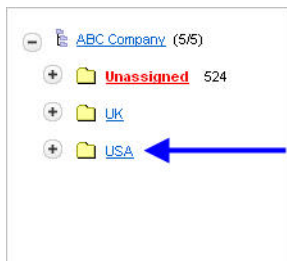
2. Go to the “**Company Structure**” page.



3. Click the “+” next to the Company Structure.



4. **Select the folder** that contains the user(s) you want to unassign.





5. Go to the “Users” tab.

USA

Details **Users** Folders Accounts Lines and Services

Name:

Location: ABC CompanyUSA

Description:

Cancel Update Delete

6. Check the box next to the user(s) you want to unassign.

USA

Details **Users** Folders Accounts Lines and Services

View: Assigned Filter: First Name Refresh

☒ Test Tester

1 (of 1) records returned.

Select All Deselect All Unassign

7. Click the “Unassign” button. You have now successfully unassigned a user.

Note: Unassigned users will be located in the “Unassigned” folder.

USA

Details **Users** Folders Accounts Lines and Services

View: Assigned Filter: First Name Refresh

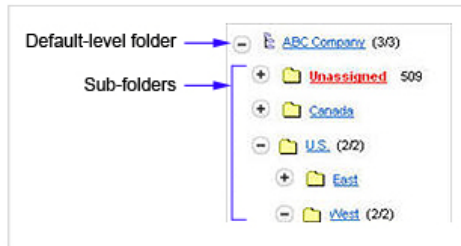
☒ Test Tester

1 (of 1) records returned.

Select All Deselect All Unassign

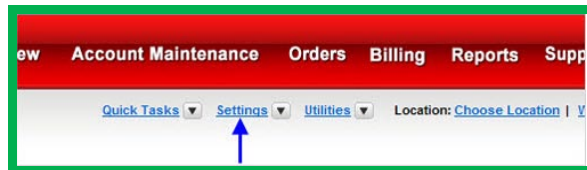
Folder maintenance

You can create a maximum of eight folder levels, including *default-level folders* and *sub-folders*, to help you organize your users.

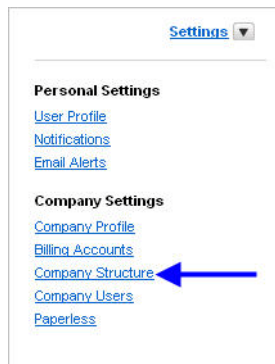


Adding a default-level folder

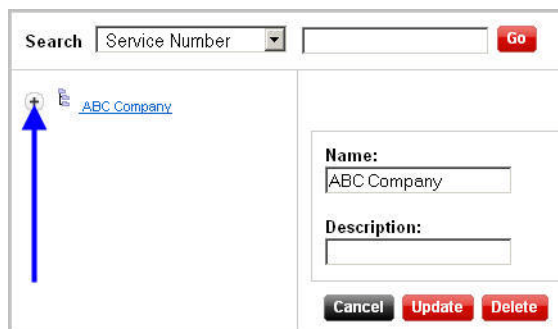
1. Click on the “**Settings**” dropdown.



2. Go to the “**Company Structure**” page.



3. Click the “+” next to the Company Structure.





4. Select the “**Folders**” tab. The Company Structure folders screen will appear.

ABC Company

Details Users **Folders** Accounts Lines and Services

Name:
ABC Company

Location:
ABC Company

Description:

5. Click the “**New**” button.

ABC Company

Details Users **Folders** Accounts Lines and Services

Filter: Folder Refresh

☐ UK
☐ Unassigned
☐ USA

Move Delete **New**

6. Enter the “**Name**” and “**Description**” of the folder.

ABC Company

Details Users **Folders** Accounts Lines and Services

Name:
Dept A

Location:
ABC Company

Description:

Clear Create

7. Click the “**Create**” button.

ABC Company

Details Users **Folders** Accounts Lines and Services

Name:
Dept A

Location:
ABC Company

Description:

Clear **Create**

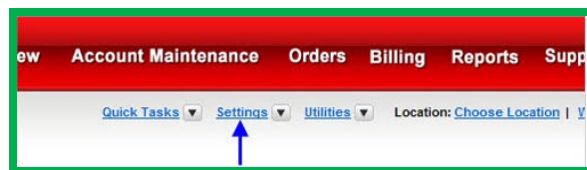


8. The new folder will appear in the Company Structure.

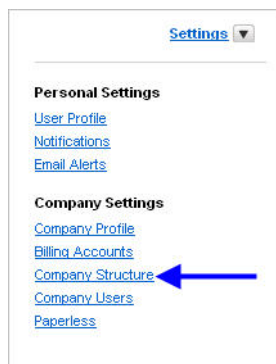


Adding a sub-folder

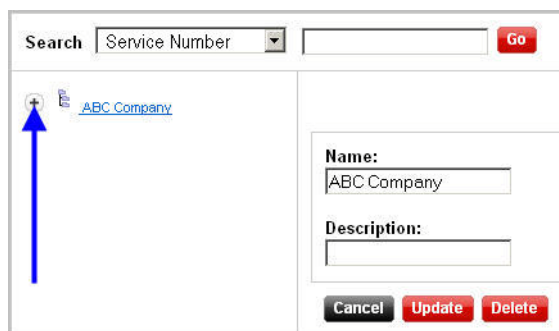
1. Click on the “Settings” dropdown.



2. Go to the “Company Structure” page.



3. Click the “+” next to the Company Structure.





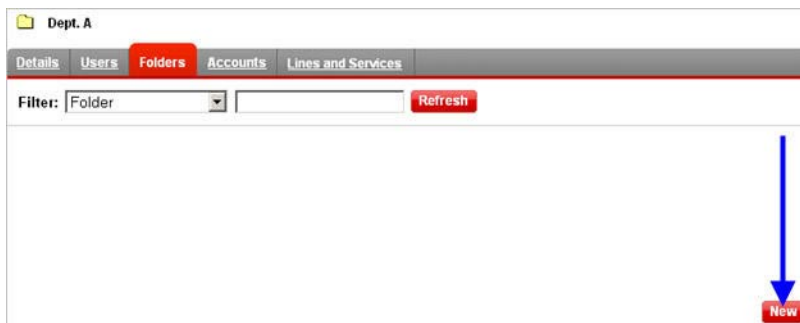
4. Click on the folder that will contain the sub-folder.



5. Go to the “Folders” tab.



6. Click the “New” button.



7. Enter the “Name” and “Description” of the sub-folder.

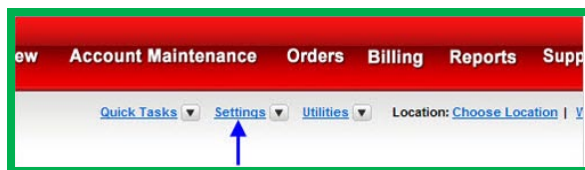




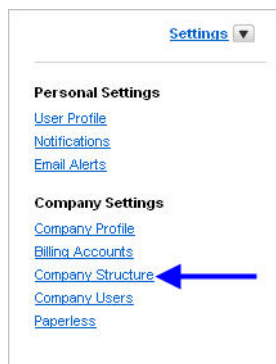
8. Click **“Create.”** You have now successfully created a sub-folder.

Moving a folder

1. Click on the **“Settings”** dropdown.



2. Go to the **“Company Structure”** page.



3. Click the **“+”** next to the Company Structure.



4. Select the “**Folders**” tab.

Dept. A

Details Users **Folders** Accounts Lines and Services

Name:
Dept. A

Location:
ABC Company\Dept. A

Description:

Cancel Update Delete

5. Select the box next to the folder(s) you want to move.

Dept. A

Details Users **Folders** Accounts Lines and Services

Filter: Folder Refresh

☒ West

Move Delete New

6. Click the “**Move**” button.

Dept. A

Details Users **Folders** Accounts Lines and Services

Filter: Folder Refresh

☒ West

Move Delete New

7. When the “Move Company Structure Folders” page appears, **select the new location** for the folder.

Move Company Structure Folders

This tool allows you to organize wireless costs in a way that is meaningful to your company. You will create the structure through a folder-based method directly online. Go to the Support link if you have questions, or choose Setup to continue.

Move Operation

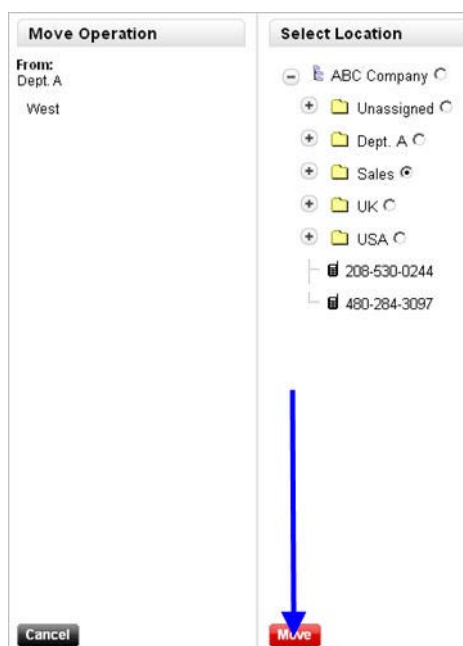
From:
Dept. A
West

Select Location

- ABC Company
- Unassigned
- Dept. A
- Sales
- UK
- USA

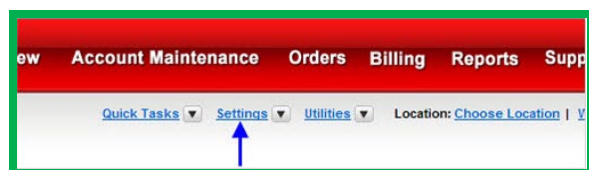


8. Click the **“Move”** button. You have now successfully moved a folder.

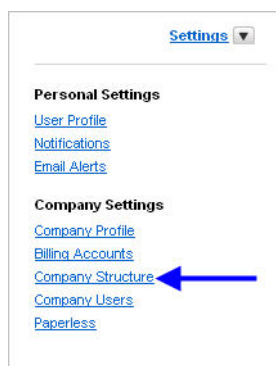


Deleting a folder

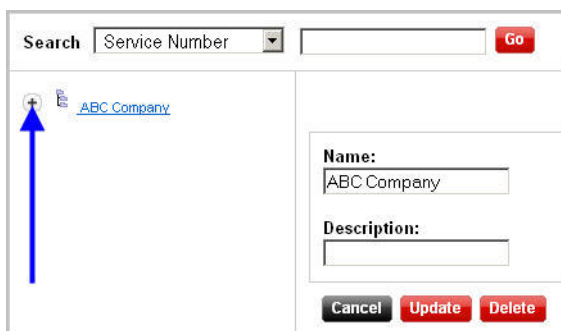
1. Click on the **“Settings”** dropdown.



2. Go to the **“Company Structure”** page.



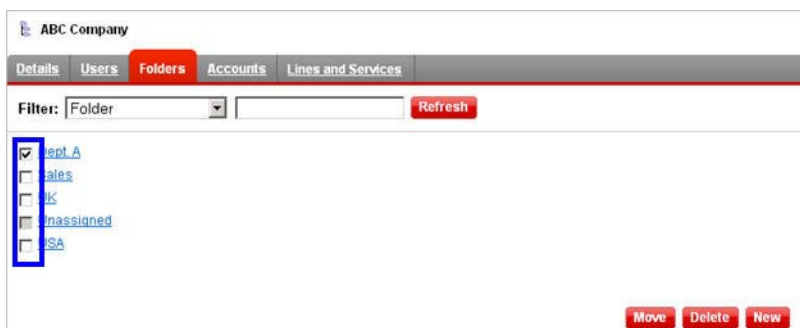
- Click the “+” next to the Company Structure.



- Select the “Folders” tab.



- Select the box next to the folder(s) you want to delete.

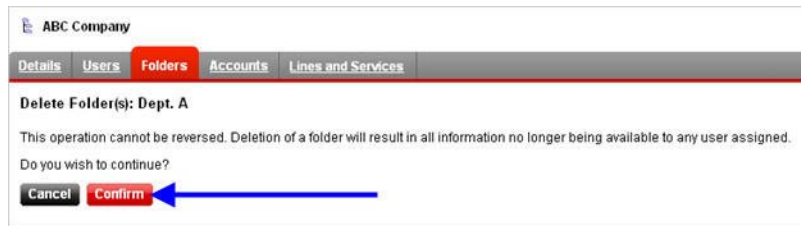


- Click the “Delete” button.





7. A confirmation message will appear. Click **“Confirm”** to delete the folder. You have now successfully deleted a folder.



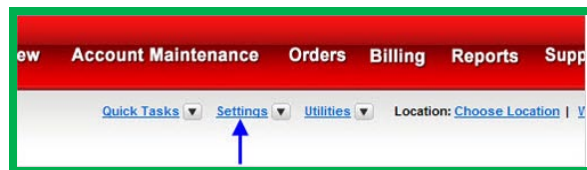
Wireless number maintenance

Assigning a wireless number

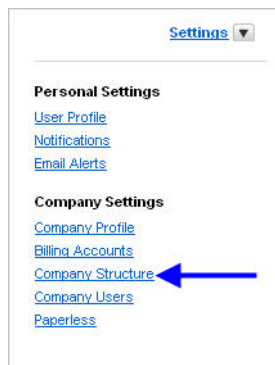
If you have the ability to shop online, and you have a Company Structure created, mobile telephone numbers are automatically placed in the “Unassigned” folder, unless your company has activated Company Structure Cascade. See the Commerce Cascade Section for more details.

Note: A wireless number can be assigned to only one folder or sub-folder.

1. Click on the **“Settings”** dropdown.



2. Go to the **“Company Structure”** page.





- Click the “+” next to the Company Structure.

Search Service Number Go

+ [ABC Company](#)

Name:

Description:

Cancel Update Delete

- Go to the “Unassigned” folder.

ABC Company (7/7)

- + **Unassigned** 524
- + [Dept_A](#)
- + [Sales](#)
- + [UK](#)
- + [USA](#)

- Select the “Lines and Services” tab.

ABC Company

Details Users Folders Accounts **Lines and Services**

Name: ABC Company

Location: ABC Company

Description:

- Check the box next to the wireless number(s) you want to assign.

Unassigned

Details Users Accounts **Lines and Services**

Filter: Refresh

<input checked="" type="checkbox"/>	000-000-0911
<input type="checkbox"/>	000-000-2131
<input checked="" type="checkbox"/>	000-000-5669
<input type="checkbox"/>	000-000-3957

511 (of 511) records returned. Page 1 of 35 Next

Select All Deselect All Assign



- Click the **Assign** button.

Unassigned

Details Users Accounts **Lines and Services**

Filter: Refresh

☒ 000-000-0911
☐ 000-000-2131
☒ 000-000-5669
☐ 000-000-3957

511 (of 511) records returned. Page 1 of 35 Next

Select All Deselect All Assign

- When the **Select Location** screen appears, choose the new location for the wireless number.

Move Operation

From:
Unassigned
208-220-0911
208-351-5669

Cancel

Select Location

☐ ABC Company
☐ Unassigned
☒ Dept. A
☐ Sales
☐ UK
☐ USA

Move



- Click the **“Move”** button. You have now successfully assigned the wireless number(s).

Move Operation

From:
Unassigned
208-220-0911
208-351-5669

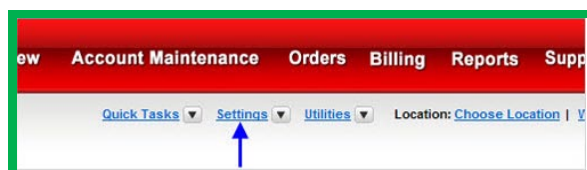
Select Location

- ABC Company
 - Unassigned
 - Dept. A
 - Sales
 - UK
 - USA

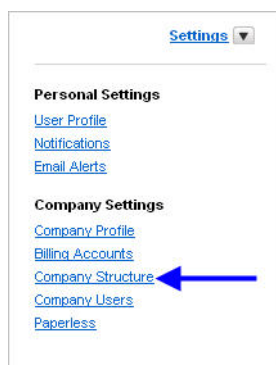
Cancel **Move**

Moving a wireless number

- Click on the **“Settings”** dropdown.



- Go to the **“Company Structure”** page.





- Click the “+” next to the Company Structure.

Search Service Number Go

+ [ABC Company](#)

Name:

Description:

Cancel Update Delete

- Choose the folder that contains the wireless number(s) you want to move.

ABC Company (7/7)

- + Unassigned 522
- + Dept. A
- + Sales
- + UK
- + USA

- Go to the “Lines and Services” tab.

Dept. A

Details Users Folders Accounts Lines and Services

Name:

Location: ABC Company/Dept. A

Description:

Cancel Update Delete

- Check the box next to the wireless number(s) you want to move.

Dept. A

Details Users Folders Accounts Lines and Services

Filter: Refresh

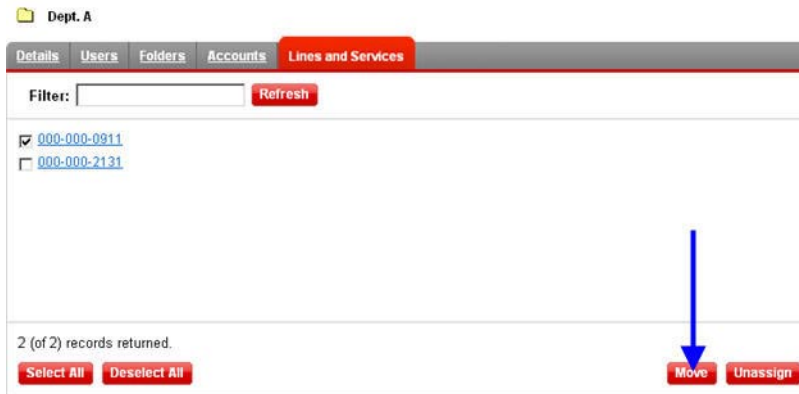
<input checked="" type="checkbox"/>	000-000-0911
<input type="checkbox"/>	000-000-2131

2 (of 2) records returned.

Select All Deselect All Move Unassign



7. Click the **“Move”** button.



8. When the “Select Location” screen appears, **choose the new location** for the wireless number(s).



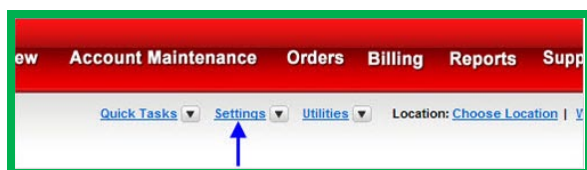


9. Click the **“Move”** button. You have now successfully moved a wireless number.

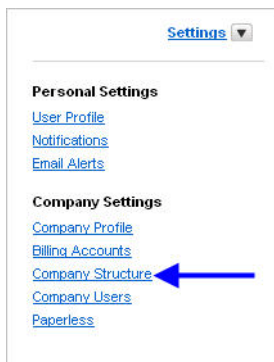


Unassigning a wireless number

1. Click on the **“Settings”** dropdown.



2. Go to the **“Company Structure”** page.





3. Click the “+” next to the Company Structure.

Search Service Number Go

+ [ABC Company](#)

Name:

Description:

Cancel Update Delete

4. Choose the folder that contains the wireless number(s) you want to unassign.

ABC Company (7/7)

- + Unassigned 522
- + Dept. A
- + Sales
- + UK
- + USA

5. Go to the “Lines and Services” tab.

Dept. A

Details Users Folders Accounts Lines and Services

Name:

Location: ABC Company/Dept. A

Description:

Cancel Update Delete

6. Check the box next to the wireless number(s) you want to unassign.

Dept. A

Details Users Folders Accounts Lines and Services

Filter: Refresh

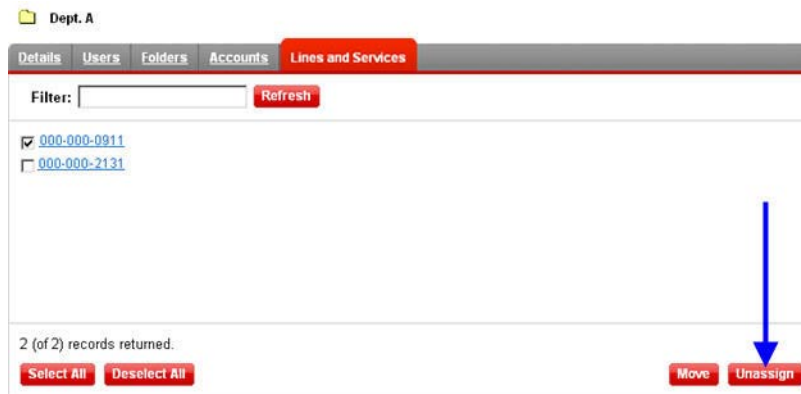
<input checked="" type="checkbox"/>	000-000-0911
<input type="checkbox"/>	000-000-2131

2 (of 2) records returned.

Select All Deselect All Move Unassign



7. Click the “**Unassign**” button to send the wireless number(s) to the ‘**Unassigned**’ folder.



Account maintenance

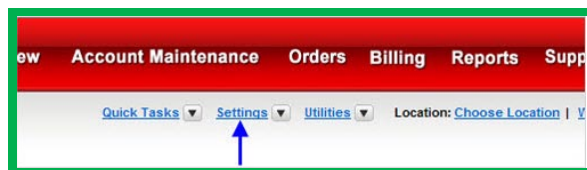
Accounts can be assigned to a folder or sub-folder and moved to new folders as your company changes.

Please be aware of the following:

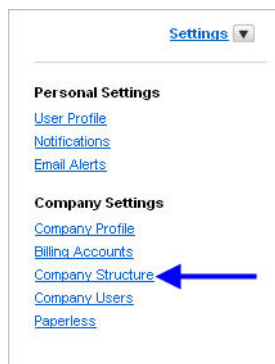
- An account can be assigned to only one folder or sub-folder.
- When an account is assigned to a folder, the wireless numbers associated with that account will remain unassigned and must be assigned manually.

Assigning an account

1. Click on the “**Settings**” dropdown.



2. Go to the “**Company Structure**” page.





- Click the “+” next to the Company Structure.

Search Service Number Go

+ [ABC Company](#)

Name:

Description:

Cancel Update Delete

- Go to the “Unassigned” folder.



- Go to the “Accounts” tab.

Unassigned

Details Users Accounts Lines and Services

Name: Unassigned

Location: ABC Company\Unassigned

Description: Unassigned

- Check the box next to the account(s) you want to assign.

Unassigned

Details Users Accounts Lines and Services

Filter: Refresh

<input checked="" type="checkbox"/>	000000000-00001
-------------------------------------	---------------------------------

13 (of 13) records returned.

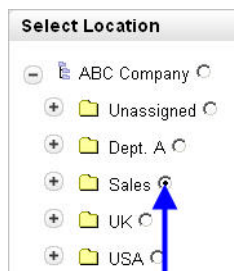
Select All Deselect All Assign



- Click the **“Assign”** button.



- When the “Select Location” screen appears, **choose the new location** for the account.

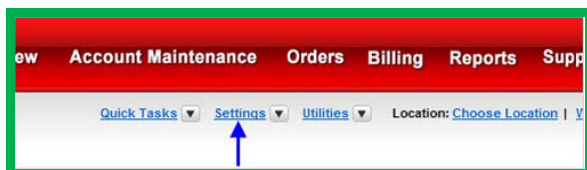


- Click the **“Move”** button. The account has been assigned to the desired folder.

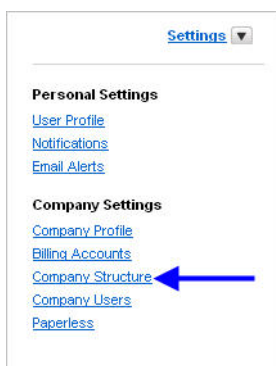


Moving an account

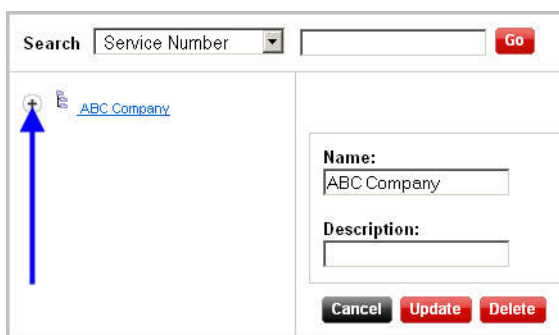
1. Click on the “Settings” dropdown.



2. Go to the “Company Structure” page.



3. Click the “+” next to the Company Structure.



4. Choose the folder that contains the account you want to move.





5. Go to the “Accounts” tab.

Sales

Details Users Folders **Accounts** Lines and Services

Name:
Sales

Location:
ABC Company\Sales

Description:

Cancel Update Delete

6. Check the box next to the account(s) you want to move.

Sales

Details Users Folders **Accounts** Lines and Services

Filter: Refresh

☒ 000000000-00001

1 (of 1) records returned.

Select All Deselect All Move Unassign

7. Click the “Move” button.

Sales

Details Users Folders **Accounts** Lines and Services

Filter: Refresh

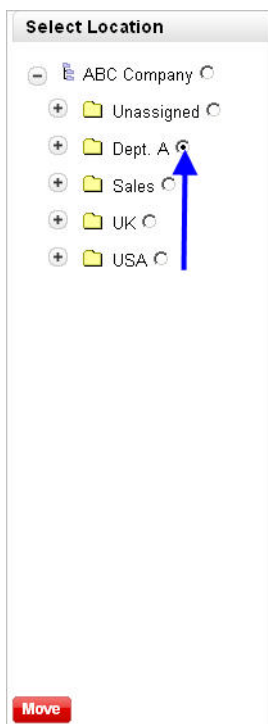
☒ 000000000-00001

1 (of 1) records returned.

Select All Deselect All Move Unassign



8. When the "Select Location" screen appears, **choose the new location** for the account(s).



9. Click the "**Move**" button. The account has been assigned to the desired folder.

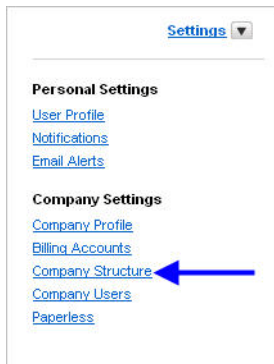


Unassigning an account

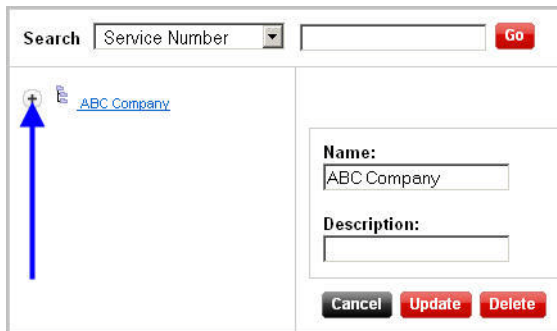
1. Click on the “**Settings**” dropdown.



2. Go to the “**Company Structure**” page.



3. Click the “+” next to the Company Structure.



4. **Select the folder** that contains the account(s) you want to unassign.





5. Go to the “Accounts” tab.

Dept. A

Details Users Folders **Accounts** Lines and Services

Name:
Dept. A

Location:
ABC Company\Dept. A

Description:

Cancel Update Delete

6. Check the box next to the account(s) you want to unassign.

Dept. A

Details Users Folders **Accounts** Lines and Services

Filter: Refresh

☒ 000000000-00001

1 (of 1) records returned.

Select All Deselect All Move Unassign

7. Click the “Unassign” button. You have now successfully unassigned the account(s).

Dept. A

Details Users Folders **Accounts** Lines and Services

Filter: Refresh

☒ 000000000-00001

1 (of 1) records returned.

Select All Deselect All Move Unassign

Commerce Cascade

With Commerce Cascade, you can assign where a new user should be assigned in the Company Structure while placing an order. You will first need to set up the Company Structure to be included in the checkout process. Only the Administrator and Primary Contact roles can set up the Commerce Cascade.

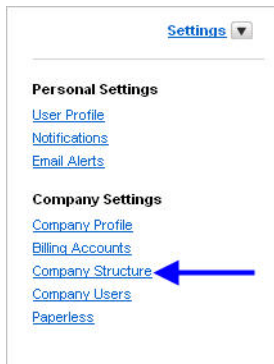


Setting up a Commerce Cascade

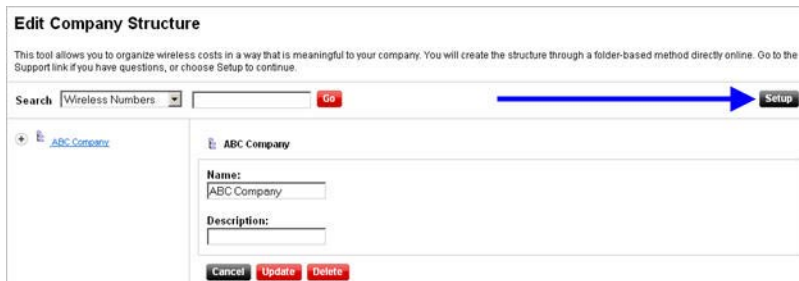
1. Click on the **“Settings”** dropdown.



2. Go to the **“Company Structure”** page.



3. Click the **“Setup”** button.





4. Select the **“Yes”** button to enable setup of the Commerce Cascade.

* Indicates required field

Setup the required levels

Please indicate if the Company Structure should be captured for all users making online purchases. If yes, please enter the field names to be presented on the order check-out page.

☒ Yes
☐ No

Level 1 *	<input type="text" value="Country"/> Examples: Folder 4, Folder 2
Level 2 *	<input type="text" value="Division"/> Examples: Police, Cost Center ABC
Level 3 *	<input type="text" value="Area"/>
Level 4 *	<input type="text" value="Region"/>
Level 5 *	<input type="text" value="Channel"/>
Level 6 *	<input type="text" value="Team"/>
Level 7 *	<input type="text" value="Location"/>
What is the minimum number of levels a user should be required to complete, so that the new wireless number is mapped correctly to your company structure? *	<input type="text" value="None"/>



5. **Provide names** for each of the levels in the Company Structure.

Note: The level name should describe the corresponding Company Structure folder level. For example, enter “Area” in the Level 3 box if all the folders at Level 3 are names of areas (e.g., Northeast, South, Midwest, and West).

* Indicates required field

Setup the required levels

Please indicate if the Company Structure should be captured for all users making online purchases. If yes, please enter the field names to be presented on the order check-out page.

☒ Yes
☐ No

Level 1 *	<input type="text" value="Country"/> Examples: Folder 4, Folder 2
Level 2 *	<input type="text" value="Division"/> Examples: Police, Cost Center ABC
Level 3 *	<input type="text" value="Area"/>
Level 4 *	<input type="text" value="Region"/>
Level 5 *	<input type="text" value="Channel"/>
Level 6 *	<input type="text" value="Team"/>
Level 7 *	<input type="text" value="Location"/>
What is the minimum number of levels a user should be required to complete, so that the new wireless number is mapped correctly to your company structure? *	<input type="text" value="None"/>



- From the dropdown, **select the minimum number of required levels** an employee is required to complete.

* Indicates required field

Setup the required levels

Please indicate if the Company Structure should be captured for all users making online purchases. If yes, please enter the field names to be presented on the order check-out page.

☒ Yes
☐ No

Level 1 *	<input type="text" value="Country"/> Examples: Folder 4, Folder 2
Level 2 *	<input type="text" value="Division"/> Examples: Police, Cost Center ABC
Level 3 *	<input type="text" value="Area"/>
Level 4 *	<input type="text" value="Region"/>
Level 5 *	<input type="text" value="Channel"/>
Level 6 *	<input type="text" value="Team"/>
Level 7 *	<input type="text" value="Location"/>
What is the minimum number of levels a user should be required to complete, so that the new wireless number is mapped correctly to your company structure? *	<div><div>None</div><div>Select number of required levels</div><div>None</div><div>Level 1</div><div>Level 1 - 2</div><div>Level 1 - 3</div></div>



- Click the **“Update”** button to save your selections. You have now successfully set up the Company Structure Commerce Cascade.

* Indicates required field

Setup the required levels

Please indicate if the Company Structure should be captured for all users making online purchases. If yes, please enter the field names to be presented on the order check-out page.

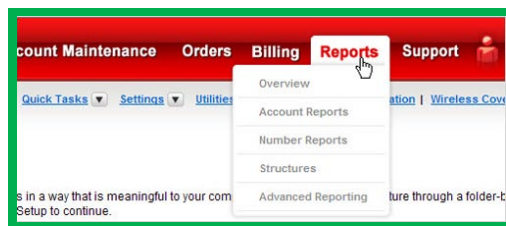
☒ Yes
☐ No

Level 1 *	<input type="text" value="Country"/> Examples: Folder 4, Folder 2
Level 2 *	<input type="text" value="Division"/> Examples: Police, Cost Center ABC
Level 3 *	<input type="text" value="Area"/>
Level 4 *	<input type="text" value="Region"/>
Level 5 *	<input type="text" value="Channel"/>
Level 6 *	<input type="text" value="Team"/>
Level 7 *	<input type="text" value="Location"/>
What is the minimum number of levels a user should be required to complete, so that the new wireless number is mapped correctly to your company structure? *	<input type="text" value="Level 1 - 2"/>

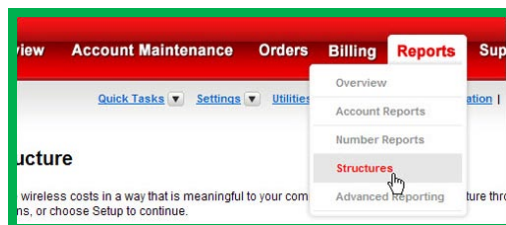
Update

Company Structure reporting

- Hover your mouse over the **“Reports”** tab.



- Go to the **“Structures”** page.





3. Select **“Company Structure”** in the **“Structure Type”** dropdown.

Structures

Structure: Default Position: Default

Manage Search Compare Admin

* Indicates required field

Please select structure criteria

Structure Type: * Billing Structure Billing Structure **Company Structure** Reporting Structure

Structure Name:

Period:

Element: Select

Status: Select

Attribute: Select

Keyword:

Search Scope ☐ Entire Structure ☒ From Current Location

Memo Bill Distribution **Submit** **Reset**

4. Make the desired **filter selections**.

Manage Search Compare Admin

* Indicates required field

Please select structure criteria

Structure Type: * Company Structure

Structure Name: ABC Company

Period: Mar-08

Element: Select

Status: Select

Attribute: Select

Keyword:

Search Scope ☐ Entire Structure ☒ From Current Location

Memo Bill Distribution **Submit** **Reset**

5. Click the **“Submit”** button.

Manage Search Compare Admin

* Indicates required field

Please select structure criteria

Structure Type: * Company Structure

Structure Name: ABC Company

Period: Mar-08

Element: Select

Status: Select

Attribute: Select

Keyword:

Search Scope ☐ Entire Structure ☒ From Current Location

Memo Bill Distribution **Submit** **Reset**