# Account Management

User Guide

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# Account Info

Your account info includes your login info, billing arrangement, and contact information. To view or change your account info, sign in to your account at www.civi.com and click on the "Account Info" link on the left side of the page.

*Email Address* Use your email address to sign in to your account. You can change this at any time, but it must be an email address that is not already used by another account. Civicom sends automatic notifications to this email address. This may also be your Adobe Connect username, depending on how your Adobe Connect meeting room is set up. Civicom does not distribute email addresses to third parties.

*Password* Use this password to sign in to your account. You can change this at any time. This is not related to your conferencing IDs, which use *passcodes* (see "Basics" in the Audio Conferencing User Guide). This may also be your Adobe Connect password, depending on how your Adobe Connect meeting room is set up.

*Billing Arrangement* You can choose one of two ways to be billed on an ongoing basis: credit card or invoice (see "Billing"). Also, your account can accept billing for other accounts (see "Master and Sub Accounts"). Click the "Change Billing" button here to change your billing arrangement or accept billing for other accounts.

*Admin Contact* This is your primary or administrative contact information, which is required. Civicom sends invoices to this address if no billing contact is provided.

*Billing Contact* This is your billing contact information, which is required if your billing contact is different than your administrative contact. If provided, Civicom sends invoices to this address (otherwise, the administrative contact is used).

*Account Status* Your account status is "active," unless you have cancelled your account or you are awaiting invoicing approval.

# Billing

Civicom offers a sophisticated billing system that includes various ways to organize and view your bill so you know what you're paying for.

**View Your Bill**

To view your bill, sign in to your account at www.civi.com and click on the "Billing" link on the left side of the page. The resulting page shows billing details for the current month, which is subject to change because the month hasn't closed. To see billing details for a prior month, select the billing period from the dropdown menu and click the button.

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| *Total Charges* | Find your total for the month in bold print near the top of the page. This amount is strictly based on the sum of all charges shown in more detail farther down the page. |
| *Usage* | This box summarizes total calling minutes and charges, as well as Show My Screen. These charges do not include taxes. |
| *Other Charges* | This box lists various non-calling charges for services rendered, which may include (but is not limited to) recording, transcription, Adobe Connect, Dial-A-Note, operator-assisted, or audio/video processing. |
| *Taxes, Fees & Surcharges* | This box shows taxes and surcharges, if any, based on calling and other charges. See "Taxes" for more information. |
| *Cost Center Subtotals* | A cost center is a label for billing purposes. This box breaks out all charges by cost center. One column shows cost center estimates with taxes, while the other column shows cost center subtotals without taxes. Because taxes are applied after totaling all charges, cost center subtotals with taxes are inherently estimates due to penny-rounding. Still, you can use these subtotals to bill clients or departments separately, depending on how you organize your cost centers. |
| *Download CSV* | Various CSV (comma-separated values) file download options are available: by cost center, by cost center and accounting code, and all details. |
| *PDF - Detail by Cost Center* | You can download a billing details PDF organized by cost center instead of date. |
| *Accounting Code Subtotals* | This box works the same as cost center subtotals, except it is organized by accounting code. Click the "download csv" link to obtain a CSV (comma-separated values) file organized by accounting code. For more information, see "Advanced Settings" in the Audio Conferencing User Guide. |
| *Pricing Plan* | Applicable pricing plan information is shown here for reference. |

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| *Sub Account Emails* | If your account is a master account, this box lists sub accounts under your account (see "Master and Sub Accounts"). |
| *Calling Records* | The rest of the billing page shows relevant calling details organized by date and call type (dial-in, dial-out, etc.) Show My Screen sessions are also shown, if any. Each call or session has a cost center link for modifying the cost center of the call. If applicable, an accounting code link is provided as well. |

**Billing Arrangement**

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| *Credit Card* | If you use the service during the course of a month, your credit card will be charged for these services at the beginning of the next month. A credit card billing fee of $0.39 applies. You are not charged when you do not use the service. |
| *Invoiced* | You can choose to receive a paper invoice in the mail. You are obligated to send payment in return. A billing processing fee of $3.50 applies. |

## Master and Sub Accounts

You may want to accept billing for other Civicom accounts. The master account is the account that is responsible for paying the bill, while each sub account provides individual online access to its own information but is not responsible for paying its portion of the bill. For larger organizations, sub accounts allow individuals to sign in and manage their own accounts and live calls, while billing goes to the master account.

### Make a Master Account

To make your account a master account, sign in to your account at www.civi.com and click on "account info" on the left side of the page. Then, click on the "Change Billing" button. On the resulting page, select "Become a master account—accept billing for sub accounts" and click "Continue."

The next page will ask you to enter a series of email addresses (and other information, if known) for sub accounts. Follow the onscreen instructions. Identified by email address, if an account already exists, your account accepts billing for this other account; if an account doesn't exist, it is created.

After entering the appropriate information, proceed to the next page by clicking "Continue." This shows a preview of the sub accounts you are about to make (or accept billing for). For new accounts, you can request a new conferencing ID for each account as well as enter a name (cost center).

### Identify Your Account Type

To identify what kind of account you have, sign in to your account at www.civi.com and click on "account info" on the left side of the page. Your billing arrangement is invoiced or credit card. "This is a master account" or "This is a sub account billed to another account" is shown on the next line; if not, your account is normal (neither master nor sub). Alternatively, the top of the billing page specifies your account's billing arrangement.

### Manage Sub Accounts

To view or add sub accounts, sign in to your account at www.civi.com and click "Manage Sub Accounts" on the left side of the page. Current sub accounts are listed. Click the "Add more accounts" link to add more sub accounts.

You cannot sign in to a sub account or see its billing page. However:

- The sub account's billing details are included on your master account's bill. (If cost centers are set appropriately in the sub accounts, the cost center of a charge or call implies which sub account it belongs to.)
- All sub account conferencing IDs are included on the master account's Dial-in Conferencing page.
- When requesting a new conferencing ID, the master account user selects which account the ID belongs to.
- All sub account recordings are included on the master account's recordings page.
- All sub account transcripts are included on the master account's transcripts page.

## Overview and Linked Accounts

In contrast to master and sub accounts, overview and linked accounts allow a decentralized organization to have independent departments pay their own bills, while a central department has an "overview" of the entire organization's activity. In other words, a series of accounts can have an overview account that merely oversees their activity.

Call Civicom and we will be more than happy to set up overview and linked accounts for you.

The overview account can see billing subtotals for all linked accounts. To do this, sign in to the overview account at www.civi.com and click "View Linked Accounts" on the left side of the page (this link is also available on the billing page. Click "download csv" to download a CSV (comma-separated values) file of the data on this page. Also, a "sign in" link is provided for each linked account, giving the overview account user login access to each account.