Add a New iPECS User with a Change Order

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## Add a new (Premium) User with a Change Order

Simply follow the steps below.

First, you must get a change order signed by the customer to remove and add licenses. Look for that document in the dashboard section of the Dealer Portal. If you need assistance, please contact Kim Macdonald, kmacdonald@vertical.com, or call 217-241-5699.

Dashboard 🔻	Customers •	Activity •	Management •							
Dashboard										
My Document	ts									
Profile	Cloud Seat	Cloud Seats								

Once the change order is signed and sent to kmacdonald@vertical.com, then the new user can be requested. Once that is signed and returned, you can add the new user.

## Request the New User

## Log into the Reseller portal.

Once there, click on the Customers, then Modify Existing Customer, click on the customer you wish to modify, then click Change Order.

Service Environment	My H	łome 🕂							EMS Link (
DDI Number	Mod	dify Existing	Customer						
Device Management	· Re	eseller * RS-Vertic	al ~	☑ include child resellers	Service Start	<b>m</b> ~	1 Searc	h	
Customers									
Create New Customer		Reseller	Customer ID	Customer Name	Service Plan	Status	Service Start	User License(EA)	Administrator ID
Modify Existing Customer			x	X	X	v )		X	
Sustomer Info.	1	RS-Vertical	C000000009	CM Vertical	IPECS ONE Migration Se	er Activated	2017-08-21 13:34:13	65	admin@cm-vertical.co ^
uetomar Liet	2	RS-Vertical	C100000037	SIP Service	SIP Trunk Service Plan	Activated	2022-01-05 16:42:27	0	admin@.com
usioner List	3	RS-Vertical	C000000374	Test	Standard Plan	Activated		2	admin@richtest
Customer List	4	RS-Vertical	C100000040	Testco - for digit conversion	Standard Plan	Activated		1	admin@test.co
Daily Customer Status	5	RS-Vertical	C0000000150	Vertical Demo	Standard Plan	Activated	2018-08-02 09:50:32	39	admin@cm-vertical-de
Customer Service Status	< ب	. 10			ter ee Page 1 of 1 second	10 🗸			View 1 - 5 of 5
Customer Service Usage									Excel
Items Outside of Trial Period									
ustomer Terms and conditions		6							
untermor Crown		rice (Char	nge Order	Stop Service Resume	Service Plan Change Cu	stomer Close	Un-shipped Device Allo	cate Package Upg	grade License Chang
ustomer Group									
Order Management									

In the next screen, to add the new User Type, click on Order Items. If you already have these users in this customer's inventory, click in the Order +/- column and enter the number to add.

Inande Ultrrent	Order Items					
Item Group	Item Name		Billing Account	Available	Order(+/-)	To Be(
	×X	Х	Х			
User License	Basic User	Q	Vertical Demo	0	0	
User License	Premium UC User	Q	Vertical Demo	0	0	
User License	Premium PLUS IPECS ONE USER	Q	Vertical Demo	12	0	
User License	Premium iPECS ONE USER	Q	Vertical Demo	11	0	
User License	Basic User & no VM	Q	Vertical Demo	1	0	
User License	Basic User With VM	Q	Vertical Demo	13	0	
User License	Stand Alone VM	م	Vertical Demo	2	0	
Soft Client	Skype for Business 2010 RCCV	Q	Vertical Demo	0	0	

If you do not have any of the licenses in the current inventory, scroll down to the New Order Items area to find the license to add. *Note you may need to move to another page to find it.* 

em Group	Order Item		Billing Account	Qty.	Trial pe	riod	Comment
<b>~</b> >		х	X			x 🗸 X	
ser License	IP Attendant w/VM	Q	Vertical Demo	0	0	day(s)	
oft Client	Mondago Outlook	Q	Vertical Demo	0	0	day(s)	
oft Client	MS Teams Connect	Q	Vertical Demo	0	0	day(s)	
all Recording	1 GB size	Q	Vertical Demo	0	0	day(s)	
all Recording	100 MB size	Q	Vertical Demo	0	0	day(s)	
all Recording	Unlimited Size	Q	Vertical Demo	0	0	day(s)	
АX	WebFax User	Q	Vertical Demo	0	0	day(s)	
СВ	Audio Conference Bridge-25 Users	Q	Vertical Demo	0	0	day(s)	

Once your quantity has been selected, scroll up to the top right and click Submit Order.

er Title & Customer	Site Number Ordering Order Items	Trunk Channe	$\left   ight angle$ Device Ordering $ ight angle$	Call Bundle Devic	e Shipping Info.	Submit Or
Change Current	Order Items Item Name	x	Billing Account	Available	Order(+/-)	To Be(E
User License	Basic User	٩	Vertical Demo	0	0	
User License	Premium UC User	م	Vertical Demo	0	0	
User License	Premium PLUS iPECS ONE USER	מ	Vertical Demo	12	0	
User License	Premium iPECS ONE USER	Q	Vertical Demo	11 🤇	1 🗘 (F.)	
User License	Basic User & no VM	م	Vertical Demo	1	0	
User License	Basic User With VM	מ	Vertical Demo	13	~ 300 <b>0</b>	
User License	Stand Alone VM	Q	Vertical Demo	2	0	
Soft Client	Skype for Business 2010 RCCV	٩	Vertical Demo	0	0	

To complete the submission, scroll down to the bottom right and click Save & Submit Order.

		View 1 - 1 of 1
Cancel	Save Order	Save & Submit Order

Once the order has been accepted by Vertical, you will get an e-mail to notify the administrator of that (sample below).

Order Notification_Vertical Demo_Change_Appr	oved
iPECS Cloud To Start your reply all with: Approved. Confirmed, thank you. Than	③       ← Reply       ≪ Reply All       → Forward       III       …         Tue 10/24/2023 2:57 PM         Ink you for your confirmation.       I Feedback
Customer Company Name : Vertical Demo Customer Type : Normal Order No. & Title : 503035 / Vertical Demo Change Order Service Plan : Standard Plan Order Type : Change Order Status : Approved Order Date : 2023-10-24 12:54:33 Request to : Vertical Order Reseller : RS-Vertical Order User : Rich Balazsi Order Note : Approval Comment :	

To confirm acceptance of the order, log back into the Reseller Portal. You will see an indication at the top of the screen to alert you of an order to be confirmed. This will stay there until you click OK or OK ALL.

Next, click Order Management, then Order Final Confirm, then double-click on the order for the last step of acceptance.

Service Environment	My Home 🕂	
DDI Number	Order Final Confirm	
Device Management	Reseller RS-Vertical      Vinclude child resellers     Search	
Customers		
Order Management	Order Date         Reseller         Customer ID         Customer Name         Order No         Order Type         Order Tatus         Order Title	x
Order Status	1 2023-10-24 12:54:33 RS Vertical 2 0000000150 Vertical Demo 503035 Change Approved Vertical Demo Change Order	
Order Approval Order Final Confirm		View 1 - 1 of 1 Excel
Reseller		

Scroll down to review the list of item(s) requested. Click Final Confirm at the bottom right of the screen.

rder	Items											
	Item Group	Order Item			Billing Account	Act. Date	Billing Start	Customer Price	Now (EA)	Order(+/-)	To Be (EA)	Comm
			Х									
1	User License	Premium iPECS	S ONE USER	2	Vertical Demo	2022-08-02	2022-08-02	0	11	1	12	
- 22	45				ra ka Page	1 of 1   >> >= 10	~				View	v 1 - 1 of
pro	val Comment											
										( Fir	al Confirm	Rejec

Click OK to confirm and accept success. The new user will be in the inventory and ready to be added.

