## Upgrade a User Type in iPECS Cloud

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## Upgrade a User: Going From a Basic User to a Premium User

See the below for the steps to upgrade a user.

The first step is to get a change order signed and get the user added via the Reseller Portal. Please refer to the iPECS Insight for step-by-step instructions on how to do that.

Once you have the new user type added you are ready to convert the existing user to the new User Type.

Access the Customer Manager portal for the customer. Go to User, User Setup and either enter the extension number and hit search at the top of the screen, or click on the name of the user to modify.

Company	~	My Home User Ph	one Configuration	User Feature Configura	tion					*
User	^	User Setup								
User Phone Configuration		· Site All Sites ✓ Exter User List	sion 🤄		Search					^
Account Information		Site	Extension +	Name	Package	Direct Dial Call Number	Call Barring	Device	Update Time	
Call Manager	~	21 Vertical Demo	295	1050i Demo	Premium IPECS ONE USER		Vertical Demo	IPECS One Standard, 1050	2023-09-21 09:31:31	_
Status View	~	22 Vertical Demo	297	9240 Demo	Basic User With VM		Vertical Demo	LDP-9240D	2023-09-21 09:31:31	
License Management	~	23 Vertical Demo	256	Digital 9224 Demo	Basic User With VM		Vertical Demo	LDP-9224DF	2023-09-21 09 31 31	
Call History	~	24 U Verical Delito	200	ET OUTEST	Dask, Cold With VM		Venical Denic	L0F-702+0D	2023-09-21 09:31:31	
Mu Manua Camina		Φ			14 4	< Page 3 of 3 ⇒ +1 10 ♥				View 21 - 24 of 24
My Home Setting							Add Modify	Delete Multiple User Add List	Download Upload	Bulk Change
Authority Setting	~									
My Information										
		Extension *	297			Rule Number, Min. 100 ~ Max	299			
		Name *	9240	Der	no	This name is also used for pho	one display name.			
		Site *	Vertical Demo			~				
		Group Member Type *	<ul> <li>Single site group me</li> </ul>	embers Multi site group r	nembers					
		Portal ID *	297@cm-vertical-demo	com .						
		Password	********			At least 8 characters, Max 15	characters.			
		E-mail	jstucker@vertical.com							
		AAD ID								

Click Modify, then click the Change button next to the current user package.

Fxtension*       297       Rule Number, Min 100 ~ Max 299         Name*       9240       Demo       This name is also used for phone display name.         Site*       Vertical Demo       This name is also used for phone display name.         Group Member Type*       Image: Sirgle site group members       Multi site group members         Portal ID*       297@cm-vertical-demo.com         Password       Image: Sirgle site group members.       At least 8 characters, Max 15 characters.         Confirm Password       Image: Sirgle site group members.       Image: Sirgle site group members.         Lenail       jstucker@vertical.com       Image: Sirgle site group members.	
Fxtension*       297       Rule Number, Min 100 ~ Max 299         Name*       9240       Demo       This name is also used for phone display name.         Site *       Vertical Demo       This name is also used for phone display name.         Group Member Type *       • Sirgle site group members       Multi site group members         Portal ID *       297@cm-vertical-demo.com         Password       • • • • • • • • • • • • • • • • • • •	
Name*     9240     Demo     This name is also used for phone display name.       Site*     Vertical Demo     ✓       Group Member Type*     Single site group members     Multi site group members       Portal ID*     297@cm-vertical-demo.com       Password     Multi site group members       Confirm Password     Multi site group members       Image: site group members     Multi site group members       Password     Image: site group members       Pass	
Site*     Vertical Demo       Group Member Type*     Sirgle site group members       Portal ID*     297@cm-vertical-demo.com       Password     Image: Confirm Password       Confirm Password     Image: Confirm Password       E-mail     jstucke@vertical com	
Group Member Type * <ul> <li>Single site group members</li> <li>Multi site group members</li> </ul> Portal ID *              297@cm-vertical-demo.com          Password <ul> <li>At least 8 characters, Max 15 characters.</li> <li>Confirm Password</li> <li>istucke@vertical.com             </li></ul> Istucke@vertical.com <ul> <li>Istucke@vertical.com</li> </ul>	
Portal ID*     297@cm-vertical-demo.com       Password     At least 8 characters, Max 15 characters.       Confirm Password     Image: State and Sta	
Portal ID*     29/@cm-vertical-demo.com       Password     At least 8 characters, Max 15 characters.       Confirm Password     Password       E-mail     [stucker@vertical.com	
Password     At least 8 characters, Max 15 characters.       Confirm Password     Password       E-mail     [stucker@vertical.com]	
Confirm Password     Image: password match.       E-mail     [stucker@vertical.com	
E-mail jstucker@vertical.com	
Package Basic User With VM (/)	
User Type Single Client 7	
Direct Dial Call Number	
Call Barring * Site Call Barring Vertical Demo V	
Outgoing Caller ID * Company Outgoing Caller ID V 4704812858 V	
PAID number for emergency Call	
Trunk Authorization * Not Used V	
Call Fraud Option* User Default	
Call Fraud Limit * 10000 USD/Day	

Click on the Change to Existing Package radio button, then click the dropdown for your available user types and select what you are upgrading to, then click Select. Click OK to confirm, the user will then update to the new User Type.

ange Package		
Change to Upgrade Package	Please select	~
<ul> <li>Change to Existing Package</li> </ul>	Premium iPECS ONE USER (3)	
	Please select	
	Stand Alone VM (2)	
<pre></pre>	Premium iPECS ONE USER (3)	>
	Premium PLUS IPECS ONE USER (3)	

Change to Ungrade Package Places colort	
Flease select	~
Change to Existing Package Premium iPECS ONE USER (3)	~

The last set of things to do is to return the user type that you upgraded from.

Log into the Reseller portal. Once there click on the Customers, then Modify Existing Customer. Choose the customer you wish to modify, then click Change Order.

Service Environment	My H	Horme 🕂							EMS Link >
DDI Number	Mod	dify Existing	Customer						
Device Management	·R	eseller* RS-Vertica	· ~	☑ include child resellers	- Service Start	<b>m</b> ~	1 Search		
Customers									
Create New Customer		Reseller	Customer ID	Customer Name	Service Plan	Status	Service Start	User License(EA)	Administrator ID
Modify Existing Customer			x		x	<b>~</b> X		X	
Customer Info.	1	RS-Vertical	C000000009	CM Vertical	IPECS ONE Migration Ser	Activated	2017-08-21 13:34:13	65	admin@cm-vertical.co ^
Sustamor List	2	RS-Vertical	C100000037	SIP Service	SIP Trunk Service Plan	Activated	2022-01-05 16:42:27	0	admin@.com
Justomer 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	4 Ø 8	n.			ter ee Page 1 of 1 so set	10 🗸			View 1 - 5 of 5
Customer Service Usage									Excel
Items Outside of Trial Period									
Customer Terms and conditions		6							
Customer Group		rice : (Chang	ge Order	Service Resume	Service Plan Change Cust	orner Close	Un-shipped Device Alloc	ate Package Upg	License Change
Order Management									

Click on the line item to return and in the Oder (+/-) column hit the down arrow to get to the number of users to return.

Item Group	Item Name		Pilling Account	Available	Order(+/-)	To Ro(EA)	Act Date	Dilling St
v v	× X	×		Available	01061(+/-)	TO BE(EA)	Act. Date	bining of
Jser License	Basic User	Q	Vertical Demo	0	0	0	2018-08-01	2018-08
Jser License	Premium UC User	٩	Vertical Demo	0	0	0	2018-08-01	2018-08
Jser License	Premium PLUS iPECS ONE USER	Q	Vertical Demo	12	0	12	2022-06-07	2022-06
Jser License	Premium iPECS ONE USER	٩	Vertical Demo	11	0	11	2022-08-02	2022-08
Jser License	Basic User & no VM	2	Vertical Demo	1	0	1	2018-08-01	2018-08
Jser License	Basic User With VM	م	Vertical Demo	13 🧲	-1 \$ (EA)	12	2018-08-01	2018-08-
Jser License	Stand Alone VM	م	Vertical Demo	2	0	2	2018-08-01	2018-08-
Soft Client	Skype for Business 2010 RCCV	م	Vertical Demo	0	0	0	2018-08-01	2018-08-

At the top of the screen, click Submit Order and then at the bottom of the screen hit Save & Submit Order. You'll get an e-mail (as indicated in the instructions for adding a new user). The final step is to confirm the return to completely remove the user from the account.

Customer	C000000150	Vertical D	emo						
Order No. / Title	503037	Vertical D	emo Change Or	der					
Order type / Status	Change	Т	emporary						
Order Date	2023-10-24 13:18:	:11							
Change Date	2023-10-24								
Service Plan	Standard Plan								
Order Note									
)rder items									
Drder Items Item Group	Order Item		Qty.	Trial period	Billing	ccount	Com	nent	
Drder Items Item Group	Order Item	x	Qty.	Trial period	Billing	ccount	Com	nent	×
Drder Items Item Group	Order Item Premium IPECS ONE U	X	Qty. -1	Trial period 0 day(s	Billing	ccount	Com	nent	x
Order Items Item Group User License	Order Item Premium IPECS ONE U	X	Qty. -1	Trial period 0 day(s	Billing	ccount Demo	Com	nent	×

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, 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      Vertical      Vertical      Search	
Customers		
Order Management	Order Date Reseller Customer ID Customer Name Order No Order Type Order Status Order Title	x
Order Status	1 2023-10-24 12:54:33 RS-Vertical C000000150 Vertical Demo 503035 Change Approved Vertical Demo Change Order	
Order Approval	4 φ 2 % (1 0 √) (1 0 √)	► View 1 - 1 of 1
Order Final Confirm		Excel
Reseller		

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

Order	Items										
	Item Group	Order Item		Billing Account	Act. Date	Billing Start	Customer Price	Now (EA)	Order(+/-)	To Be (EA)	Comme
		X		Martinal David	0000.00.00	0000.00.00				10	
4	User License	Premium IPEUS ONE USER	20	vertical Demo	2022-08-02	2022-08-02	U		1	12	•
φΞ	45			He we Page 1	of 1 PR PI 10	~				View	1-1 of 1
Annro	val Comment										
, ppro											
										al Confirm	Reject
											Neject

Click OK to confirm and to accept success, these item(s) will now be removed from the customer account.

