Requesting No-Charge Additional Features in iPECS Cloud

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Requesting No-Charge Additional Features

There are many no-charge features that you may need to add to your customers' accounts and that is done within your Reseller Portal. Examples of those features include hunt groups, paging groups, pickup groups, shared lines, and conference rooms.

Begin by logging into your Reseller Portal. Use your credentials to log in.

Once there, click on Customers, then Modify Existing Customer. When you see your accounts, find the page the account you wish to modify is on and click that line, it will highlight blue. Next, click Change Order in the blue bubbles below the customer list.

ervice Environment	My H	iome 🕂													EMS Link
DI Number	Mod	dify Existing	Cus	tomer											
evice Management	- Re	eseller * RS-Vertica	al	v	include child resellers	- Ser	vice Start	m ~	Search]					
ustomers															
reate New Customer		Reseller		Customer ID	Customer Name		Service Plan	Status	Service Start	User License(EA)	Administrator ID	Administrator	Name Manag	er Portal	Ongoing Orders
odify Existing Customer			Х			х	X	v)		Х			х		
istomer Info.	1	RS-Vertical		C000000009	CM Vertical		iPECS ONE Migration Ser	Activated	2017-08-21 13:34:13	67	admin@cm-vertical.com	Joti Patel	-		0
istomer List	2	RS-Vertical		C100000037	SIP Service		SIP Trunk Service Plan	Activated	2022-01-05 16:42:27	0	admin@.com	Toni Elich	÷0		0
Customer List	3	RS-Vertical		C0000000374	Test		Standard Plan	Activated			admin@richtest	Rich	-		0
	4	RS-Vertical		C1000000040	Testco - for digit conversion		Standard Plan	Activated			admin@test.co	admin@test.c			0
Daily Customer Status	5	RS-Vertical	_	C0000000150	Vertical Demo	_	Standard Plan	Activated	2018-08-02 09:50:32	39	admin@cm-vertical-demo.co	m Kim Macdonal	d 🔁		0
Customer Service Status	φ 8	-						Page	1 of 1 10 V						View 1 - 5 of
Customer Service Usage															Excel
Items Outside of Trial Period															
stomer Terms and conditions			_							\neg	\neg				
		rice Start 🚺 Chan	ige Ord	fer) Diervice St	op)(Service Resume)(§	Servi	ice Plan Change)(Cu	stomer Close	Un-shipped Device Alloc	ate)(Package Up	grade) (License Change)			

Click on Order Items, then find the page that has the item you wish to add. If you don't see it in the Change Current Order Items section, scroll down (see next screenshot below) to New Order Items and then again, find the page the item is on. Click on the Order (+/-) next to the item and select the quantity to request.

rder Title & Customer S	Site Number Ordering Order Items	runk Channel	Device Ordering Scal	l Bundle 🔪 Devi	ce Shipping Info. 📏	Submit Order	
der Title & Customers	site > Number Ordening > Order items	Tunk Channel			ce snipping mio. Z	Submit Order	
Change Current	Order Items					-	
Item Group	Item Name		Billing Account	Available	Order(+/-)	To Be(EA) Act. Date	Billing Start Comment
~	X	x	X				
Group Feature	Shared Line	٩	Vertical Demo	4	0 🗘 (EA)	4 2018-08-01	2018-08-01
Group Feature	ACD Group	٩	Vertical Demo	3	0	3 2022-10-27	2022-10-27
Group Feature	Conference Room	٩	Vertical Demo	1	0	1 2018-08-01	2018-08-01
Analytics	Analytics Advanced Plus Endpoint	٩	Vertical Demo	15	0	15 2022-11-11	2022-11-11 ACD Group Us
Analytics	Analytics Advanced Plus Supervisor	م	Vertical Demo	3	0	3 2022-11-11	2022-11-11
φ <u>8</u> 6			IN A Page 4 of 4	⊳ n 10 ¥			View 31 - 35 of 3
7 12 1							
ge Order							
Group Feature	Shared Line	<u>بر</u>	vertical Demo	4	U 🕌 (EA)	4 2018-08-01	2018-08-01
Group Feature	ACD Group	م	Vertical Demo	3	0	3 2022-10-27	2022-10-27
Group Feature	Conference Room	<u>م</u>	Vertical Demo	1	0	1 2018-08-01	2018-08-01
Analytics	Analytics Advanced Plus Endpoint	Q	Vertical Demo	15	0	15 2022-11-11	2022-11-11 ACD Group
Analytics	Analytics Advanced Plus Supervisor	٩	Vertical Demo	3	0	3 2022-11-11	2022-11-11
•							
¢ 25 %			IN NO 4 OF 4	>> > 10 ¥			View 31 - 35
New Order Items							
Item Group	Order Item		Billing Account	Qty	Trial period	Comment	
~	x	х	X		X	• X	
Soft Client	MS Teams Connect	<i>م</i>	Vertical Demo	(0 day(s)		
Call Recording	1 GB size	٩	Vertical Demo	0 🗘 (EA) 0 day(s)		
Call Recording	100 MB size	٩	Vertical Demo) 0 day(s)		
Call Recording	Unlimited Size	م	Vertical Demo	(
	WebFax User	٩	Vertical Demo	(
FAX	Audio Conference Bridge-25 Users	م	Vertical Demo		,,,,		
				,			
ACB			Vertical Demo		(a)uob 0 (
	Audio Conference Bridge-100 Users CTI Call Control	ے م	Vertical Demo	(

Once your quantity has been selected, click Submit Order in the top right of the screen.

Change Current	Order Items							
Item Group	Item Name		Billing Account	Available	Order(+/-)	To Be(EA)	Act. Date	Billing
~	x [Х		(
Group Feature	Shared Line	P	Vertical Demo	4	1 🗘 (EA)	5	2018-08-01	2018-0
Group Feature	ACD Group	م	Vertical Demo	3	~ 500	3	2022-10-27	2022-1
Group Feature	Conference Room	P	Vertical Demo	1	0	1	2018-08-01	2018-08
Analytics	Analytics Advanced Plus Endpoint	Q	Vertical Demo	15	0	15	2022-11-11	2022-1
Analytics	Analytics Advanced Plus Supervisor	Q	Vertical Demo	3	0	3	2022-11-11	2022-1

To complete the submission, go to the bottom-right side of the page and click Save & Submit Order.

Cancel Save Order Save & Submit	Order

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

Order Notificatio	on_Vertica	l Demo_Change_A	pproved	1					
iPECS Cloud			\odot	← Reply	🖔 Rep	ply All	→ Forward		
To Kimber	ly Macdonald						Tue 10	/24/2023	2:57 PM
i This message was sent v	vith High importa	ince.							
Vertical Demo_Ch	ange_Approve	d [503035],xlsx 5 KB 🗸							
Start your reply all with:	Approved.	Confirmed, thank you.	Thank you	for your confir	mation.	(i) Fee	dback		
Customer Company Na		Demo							
Customer Type : Norma									
Order No. & Title : 5030 Service Plan : Standard		Demo Change Order							
Order Type : Change	Plan								
Order Status : Approve	4								
Order Date : 2023-10-2									
Request to : Vertical									
Order Reseller : RS-Vert	tical								
Order User : Rich Balazs	si								
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 needing to be confirmed. This will stay there until you click OK or OK ALL.

Next, click Order Management, then Order Final Confirm. 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 VII Include child resellers Search	
Customers		
Order Management	Order Date Reseller Customer ID Customer Name Order No Order Type Order Status Order Title x	x
Order Status	1 2023-10-2412:54:33 RS-Vertical C0000000150 Vertical Demo 503035 Change Approved Vertical Demo Change Order	1
Order Approval		▶ /iew 1 - 1 of 1
Order Final Confirm		Excel
Reseller		

Scroll down to review the list of item(s) requested and 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								
1	User License	Premium iPECS ONE USER	٩	Vertical Demo	2022-08-02	2022-08-02	0	11	1	12	
Ф 23	45			re ee Page 1	of 1 => >1 10	~				View) 1-1of1
Appro	val Comment										
									Fir	nal Confirm	Reject

Click OK to confirm.



The new item will be in the inventory and ready to be added!