

Add a Phone and MAC Address to Existing Customers

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Add a phone and a MAC address to an existing customer

See the below for the steps to add a phone to a customer account for service or if the customer is adding a phone, you can use the Unshipped Device Allocate option in the Reseller Portal.

First, log into the Reseller Portal. Click on "Customers", "Modify Existing Customer", and then click on the line for the customer to add a phone to.

This opens up the options at the bottom of the screen. Click "Un-shipped Device Allocate" (blue button).

The screenshot displays the 'Modify Existing Customer' interface in the Reseller Portal. On the left is a navigation menu with options like 'Service Environment', 'DDI Number', 'Device Management', and 'Customers'. The main area shows a search bar with 'Reseller' set to 'RS-Vertical' and a 'Search' button. Below is a table of customer records:

	Reseller	Customer ID	Customer Name	Service Plan	Status	Service Start	User License(EA)	Administrator ID
1	RS-Vertical	C000000009	CM Vertical	iPECS ONE Migration Ser	Activated	2017-08-21 13:34:13	68	admin@cm-vertical.com
2	RS-Vertical	C100000037	SIP Service	SIP Trunk Service Plan	Activated	2022-01-05 16:42:27	0	admin@cm.com
3	RS-Vertical	C000000374	Test	Standard Plan	Activated		3	admin@richtest.com
4	RS-Vertical	C100000040	Testco - for digit conversion	Standard Plan	Activated		1	admin@test1.co
5	RS-Vertical	C000000150	Vertical Demo	Standard Plan	Activated	2018-08-02 09:50:32	39	admin@cm-vertical-demo.com

At the bottom of the screen, there is a row of action buttons: 'Service Start', 'Change Order', 'Service Stop', 'Service Resume', 'Service Plan Change', 'Customer Close', 'Un-shipped Device Allocate', 'Package Upgrade', and 'License Change'. The 'Un-shipped Device Allocate' button is circled in blue.


Next, scroll down to the middle of the screen. Click the "Enter Device" button, then use the drop-down to select the phone model to add. Enter the MAC address and click "Add".

Un-shipped Device Allocate

Customer Company Name: C000000150 Vertical Demo

Order No. & Order Title *: 502808 Vertical Demo Un-shipped Device Allocate




Order Date: 2023-08-17 09:22:17

Allocate Date *: 2023-08-17 

Comment:

Assigned Device

Device Model	Assigned Qty.	Return Qty.	MAC	Serial No.	Add/Return
<input type="text"/>	x		<input type="text"/>	x	<input type="text"/> x

Available Stock Enter Device Excel File

Device Model *: 10101

MAC *: ABC123ABC45d

Serial No.:

Billing Account *: Vertical Demo

Finally, click "Submit Order" at the bottom of the screen.

If you are in the customer manager for that account already, you may need to log out and back in to see that the MAC address is available to use.