

New iPECS User Set Up with a Change Order to Add the User

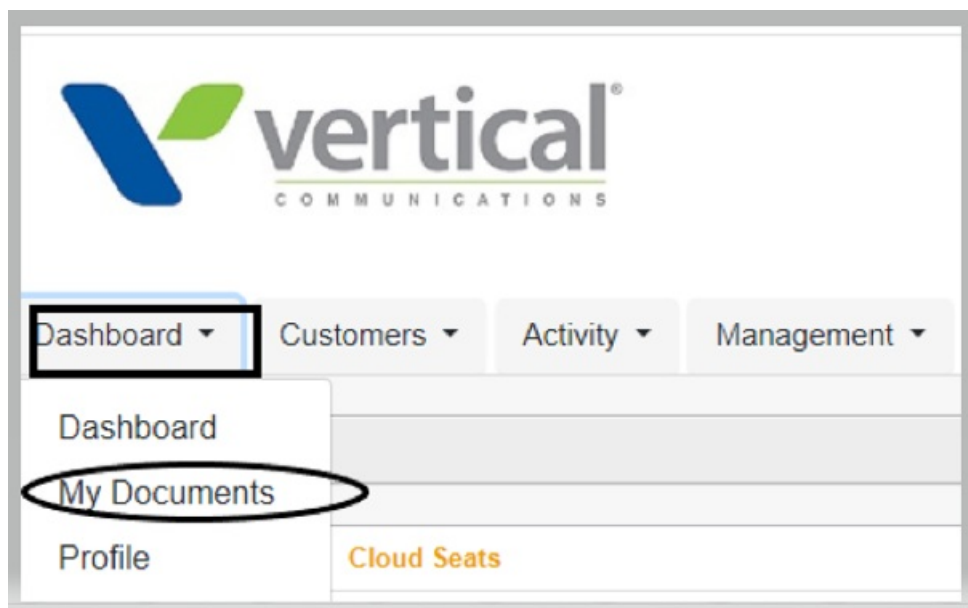
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Add a new (Premium) User with a Change Order

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.



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 Home

EMS Link

DDI Number

Device Management

Customers

Create New Customer

Modify Existing Customer

Customer Info.

Customer List

Customer List

Daily Customer Status

Customer Service Status

Customer Service Usage

Items Outside of Trial Period

Customer Terms and conditions

Customer Group

Order Management

Modify Existing Customer

Reseller: RS-Vertical

Include child resellers: ☒

Service Start:

Search

	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	65	admin@cm-vertical.co
2	RS-Vertical	C100000037	SiP Service	SiP Trunk Service Plan	Activated	2022-01-05 16:42:27	0	admin@cm
3	RS-Vertical	C000000374	Test	Standard Plan	Activated		2	admin@richtest
4	RS-Vertical	C100000040	Testco - for digit conversion	Standard Plan	Activated		1	admin@test.co
5	RS-Vertical	C000000150	Vertical Demo	Standard Plan	Activated	2018-08-02 09:50:32	39	admin@cm-vertical-de

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Excel

Service Change Order Service Stop Service Resume Service Plan Change Customer Close Un-shipped Device Allocate Package Upgrade License Change

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.

Order Title & Customer Site

Number Ordering

Order Items

Trunk Channel

Device Ordering

Call Bundle

Device Shipping Info.

Submit Order

Change Current Order Items

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

New Order Items

Item Group	Order Item	Billing Account	Qty.	Trial period	Comment
User License	IP Attendant w/VM	Vertical Demo	0	0 day(s)	
Soft Client	Mondago Outlook	Vertical Demo	0	0 day(s)	
Soft Client	MS Teams Connect	Vertical Demo	0	0 day(s)	
Call Recording	1 GB size	Vertical Demo	0	0 day(s)	
Call Recording	100 MB size	Vertical Demo	0	0 day(s)	
Call Recording	Unlimited Size	Vertical Demo	0	0 day(s)	
FAX	WebFax User	Vertical Demo	0	0 day(s)	
ACB	Audio Conference Bridge-25 Users	Vertical Demo	0	0 day(s)	

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

Order Title & Customer Site		Number Ordering	Order Items	Trunk Channel	Device Ordering	Call Bundle	Device Shipping Info.	Submit Order
Change Current Order Items								
Item Group	Item Name	Billing Account	Available	Order(+/-)	To Be(EA)			
<input type="text"/>	<input type="text"/>	<input type="text"/>						
User License	Basic User	Vertical Demo	0	0	0			
User License	Premium UC User	Vertical Demo	0	0	0			
User License	Premium PLUS IPECS ONE USER	Vertical Demo	12	0	12			
User License	Premium IPECS ONE USER	Vertical Demo	11	<input type="text" value="1"/>	12			
User License	Basic User & no VM	Vertical Demo	1	<input type="text" value="-3 ~ 300"/>	1			
User License	Basic User With VM	Vertical Demo	13	0	13			
User License	Stand Alone VM	Vertical Demo	2	0	2			
Soft Client	Skype for Business 2010 RCCV	Vertical Demo	0	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_Approved

iPECS Cloud

Reply

Reply All

Forward

To

Kimberly Macdonald

This message was sent with High importance.

Vertical Demo_Change_Approved [503035].xlsx 5 KB

Start your reply all with: 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

Order Final Confirm

Reseller: RS-Vertical

Include child resellers

Search

Order Date	Reseller	Customer ID	Customer Name	Order No	Order Type	Order Status	Order Title
2023-10-24 12:54:33	RS-Vertical	C0000000150	Vertical Demo	503035	Change	Approved	Vertical Demo Change Order

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Excel

Order Items

Item Group	Order Item	Billing Account	Act. Date	Billing Start	Customer Price	Now (EA)	Order(+/-)	To Be (EA)	Comm
1	User License	Premium IPECS ONE USER	Vertical Demo	2022-08-02	2022-08-02	0	11	1	12

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Approval Comment

Final Confirm

Reject

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

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

Confirm

Would you like to final confirm this Order?

Cancel OK

Inform

SUCCESS

OK