

Add a New iPECS User with a Change Order

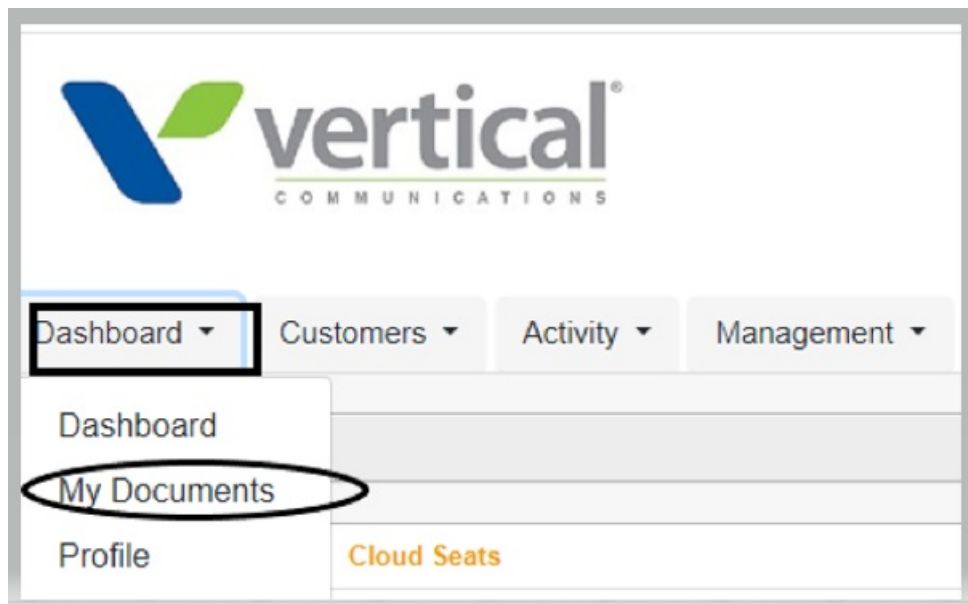
Last Modified on 10/30/2023 9:53 am EDT



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.

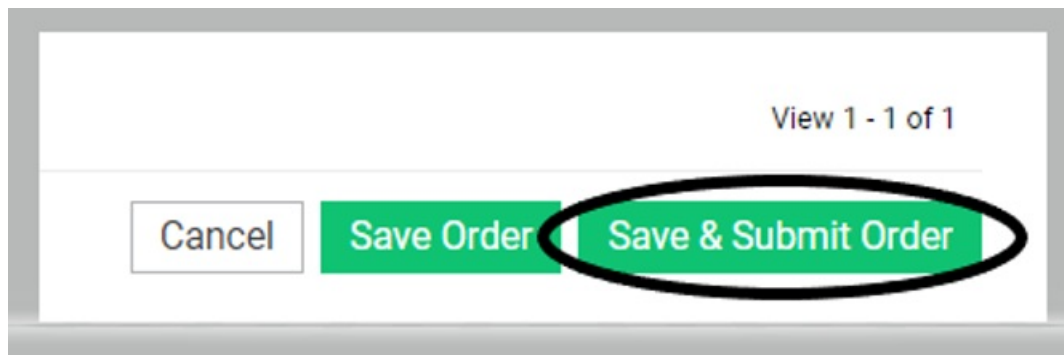
Request the New User

[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.

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)							
		x											
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	1	12							
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							

To complete the submission, scroll down to the bottom right and click 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
To Kimberly Macdonald
Tue 10/24/2023 2:57 PM

This message was sent with High importance.

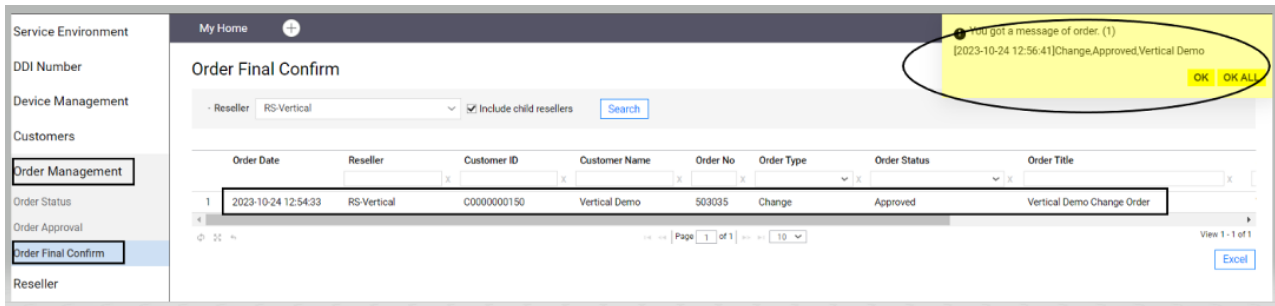
Vertical Demo_Change_Approved [503035].xlsx 5 KB

Start your reply all with: [Approved.](#) [Confirmed, thank you.](#) [Thank you for your confirmation.](#) [Feedback](#)

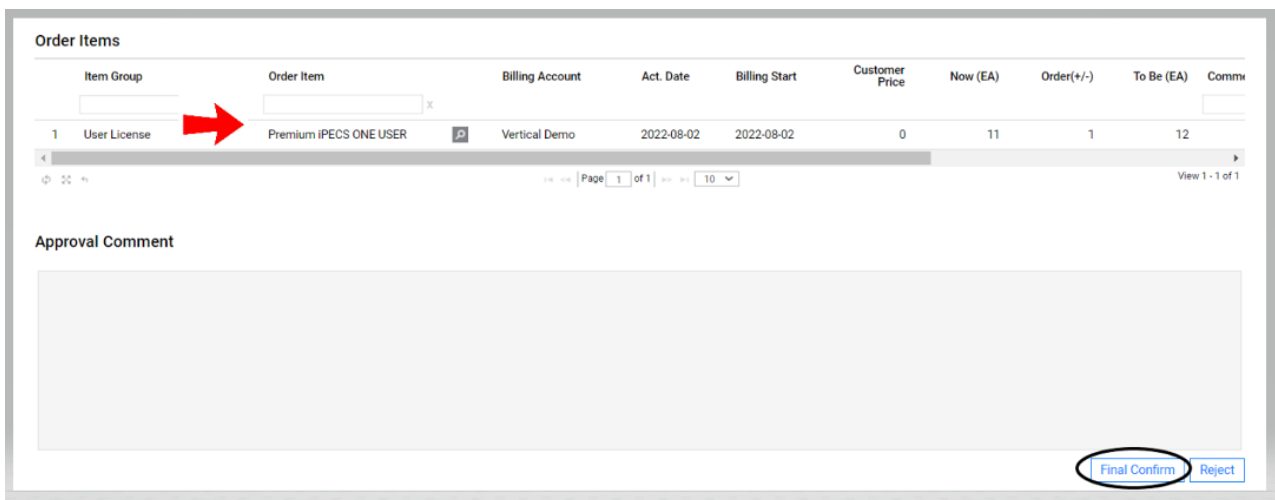
Customer Company Name : Vertical Demo
Customer Type : Normal
Order No. & Title : 503035 / Vertical Demo Change Order
Service Plan : Standard Plan
Order Type : Change
Order Status : Approved
Order Date : 2023-10-24 12:54:33
Request to : Vertical
Order Reseller : RS-Vertical
Order User : Rich Balazsi
Order 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.



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.

