

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.

The screenshot shows the 'User Setup' page in the iPECS Customer Manager portal. At the top, there are tabs for 'My Home', 'User Phone Configuration', and 'User Feature Configuration'. Below these is a search bar with a dropdown for 'Site' (set to 'All Sites') and a 'Search' button. A table below the search bar lists users with columns for Site, Extension, Name, Package, Direct Dial Call Number, Call Barring, Device, and Update Time. The user with extension 297 is selected. Below the table is a form for editing user details, including fields for Extension, Name, Site, Group Member Type, Portal ID, Password, E-mail, and AAD ID. The 'Package' field is highlighted in the original image, corresponding to the 'Basic User With VM' package shown in the table.

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

Add **Modify** Delete

Extension * 297 Rule Number, Min 100 ~ Max 299
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 At least 8 characters, Max 15 characters.
Confirm Password password match.
E-mail jstucker@vertical.com
AAD ID
Package * Basic User With VM (7) **Change**
User Type Single Client ?
Direct Dial Call Number --- NONE ---
Call Barring * Site Call Barring Vertical Demo
Outgoing Caller ID * Company Outgoing Caller ID 4704812858
PAID number for emergency Call
Trunk Authorization * Not Used
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.

Change Package [X]

Change to Upgrade Package
 Change to Existing Package

--- Please select ---
 Premium iPECS ONE USER (3)
 --- Please select ---
 Stand Alone VM (2)
Premium iPECS ONE USER (3)
 Premium PLUS iPECS ONE USER (3)

Change Package [X]

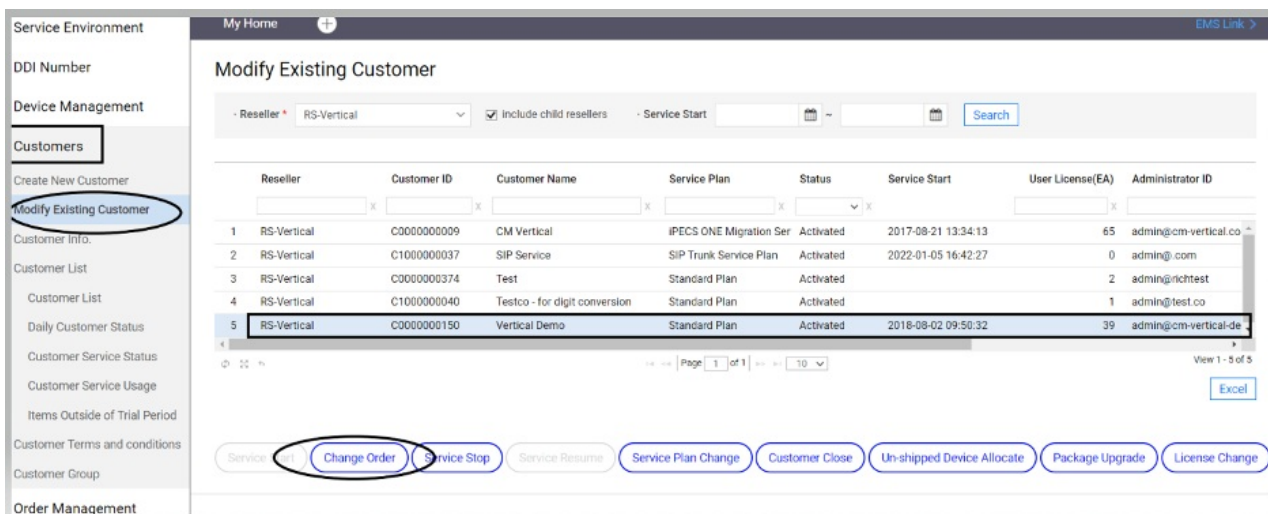
Change to Upgrade Package
 Change to Existing Package

--- Please select ---
 Premium iPECS ONE USER (3)

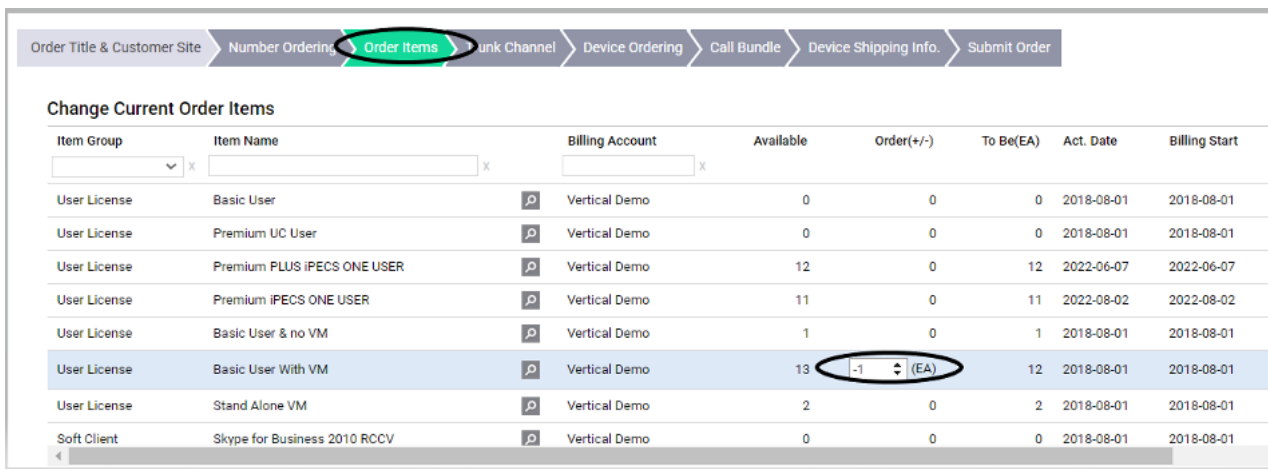
Select **Cancel**

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.



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.



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.

Order Title & Customer Site > Number Ordering > Order Items > Trunk Channel > Device Ordering > Call Bundle > Device Shipping Info > **Submit Order**

Customer: C000000150 Vertical Demo
 Order No. / Title: 503037 Vertical Demo Change Order
 Order type / Status: Change Temporary
 Order Date: 2023-10-24 13:18:11
 Change Date: 2023-10-24
 Service Plan: Standard Plan
 Order Note:

Order Items

Item Group	Order Item	Qty.	Trial period	Billing Account	Comment
User License	Premium IPECS ONE USER	-1	0 day(s)	Vertical Demo	

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Cancel Save Order **Save & Submit Order**

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

Device Management

Customers

Order Management

Order Status

Order Approval

Order Final Confirm

Reseller

Order Final Confirm

- Reseller: RS-Vertical Include child resellers Search

You got a message of order: (1)
 [2023-10-24 12:56:41]Change.Approved,Vertical Demo **OK OK ALL**

Order Date	Reseller	Customer ID	Customer Name	Order No	Order Type	Order Status	Order Title
2023-10-24 12:54:33	RS-Vertical	C000000150	Vertical Demo	503035	Change	Approved	Vertical Demo Change Order

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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)	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

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

