## 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.

Company	~	My Home User P	hone Configuration	User Feature Configur	ation					
User	~	User Setup								
User Setup		· Site All Sites V Exte	nsion		Search					
User Phone Configuration		User List								
User Feature Configuration Account Information		Site	Extension +	Name	Package	Direct Dial Call Number	Call Barring	Device	Update Time	
Call Manager	~	21 Vertical Demo	295	1050i Demo	Premium IPECS ONE USER	Direct then Call Humber	Vertical Demo	IPECS One Standard, 1050	2023-09-21 09:31:31	
call Manager	~	22 Vertical Demo	297	9240 Demo	Basic User With VM		Vertical Demo	LDP-9240D	2023-09-21 09:31:31	
Status View	~	23 Vertical Demo	298	Digital 9224 Demo	Basic User With VM		Vertical Demo	LDP-9224DF	2023-09-21 09 31:31	
License Management	~	24 Vertical Demo	299	E700 Test	Basic User With VM		Vertical Demo	LDP-70248D	2023-09-21 09:31:31	
Call History	~									
		Φ			14	<q 10="" 3="" of="" p="" page="" ⇒="" ≥="" ♥<=""></q>				View 21 - 24 of
My Home Setting								Delete Multiple User Add Lis	Developed Holord	Bulk Change
Authority Setting	~						Add Modily	Delete Multiple Oser Add Lis	Cownioad Opicad	Buik Change
My Information										
		Extension *	297			Rule Number, Min. 100 ~ Ma				
		Name *	9240	De	mo	This name is also used for p	shone display name.			
		Site *	Vertical Demo			~				
		Group Member Type *	<ul> <li>Single site group m</li> </ul>	embers Multi site group	members					
		Portal ID *	297@cm-vertical-demo	(07)						
		Password				At least 8 characters, Max 1	5 characters			
		E-mail				Pit March & CharleCotts, March 1	o unaraciens.			
		AAD ID	jstucker@vertical.com							

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

			Add Modify Delete
Extension *	297		Rule Number, Min 100 ~ Mac 299
Name *	9240	Demo	This name is also used for phone display name.
Site *	Vertical Demo	~	
Group Member Type *	Single site group members     O Multi si	te group members	
Portal ID *	297@cm-vertical-demo.com		
Password		<b>_</b>	
Confirm Password		<b></b>	password match.
E-mail	jstucker@vertical.com		
AAD ID			
Package *	Basic User With VM (7)		Change
		X	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.

ange Package		
Change to Upgrade Package	Please select	~
<ul> <li>Change to Existing Package</li> </ul>	Premium iPECS ONE USER (3)	
	Please select	
	Stand Alone VM (2)	
<pre></pre>	Premium iPECS ONE USER (3)	>
	Premium PLUS IPECS ONE USER (3)	

Change to Upgrade Package Please select	
Flease select	~
Change to Existing Package Premium iPECS ONE USER (3)	~

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.

Service Environment	My H	Home 🕂							EMS Link )
DDI Number	Mod	dify Existing	Customer						
Device Management	·R	teseller * RS-Vertic	al ~	Include child resellers	- Service Start	<b>m</b> ~	m Search	1	
Customers									
Create New Customer		Reseller	Customer ID	Customer Name	Service Plan	Status	Service Start	User License(EA)	Administrator ID
Modify Existing Customer			x		x	✓ X		X	
Customer Info.	1	RS-Vertical	C000000009	CM Vertical	IPECS ONE Migration Ser	Activated	2017-08-21 13:34:13	65	admin@cm-vertical.co *
ustomer List	2	RS-Vertical	C100000037	SIP Service	SIP Trunk Service Plan	Activated	2022-01-05 16:42:27	0	admin@.com
Justomer List	З	RS-Vertical	C000000374	Test	Standard Plan	Activated		2	admin@richtest
Customer List	4	RS-Vertical	C100000040	Testco - for digit conversion	Standard Plan	Activated		1	admin@test.co
Daily Customer Status	5	RS-Vertical	C0000000150	Vertical Demo	Standard Plan	Activated	2018-08-02 09:50:32	39	
Customer Service Status	< ب	( n			ter ee Page 1 of 1 so set	10 🗸			View 1 - 5 of 5
Customer Service Usage									Excel
Items Outside of Trial Period									
Customer Terms and conditions			_						
		vice (art ) Chan	ge Order	p Service Resume S	Gervice Plan Change Cust	lomer Close	Un-shipped Device Alloc	ate Package Upg	rade License Change
Customer Group									
Order Management									

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.

	Order Items							
Item Group	Item Name		Billing Account	Available	Order(+/-)	To Be(EA)	Act. Date	Billing Sta
		^		Ā				
User License	Basic User	م	Vertical Demo	0	0	0	2018-08-01	2018-08-0
User License	Premium UC User	Q	Vertical Demo	0	0	0	2018-08-01	2018-08-0
User License	Premium PLUS iPECS ONE USER	م	Vertical Demo	12	0	12	2022-06-07	2022-06-0
User License	Premium iPECS ONE USER	م	Vertical Demo	11	0	11	2022-08-02	2022-08-0
User License	Basic User & no VM	م	Vertical Demo	1	0	1	2018-08-01	2018-08-0
User License	Basic User With VM	P	Vertical Demo	13	1 🗘 (EA)	12	2018-08-01	2018-08-0
User License	Stand Alone VM	م	Vertical Demo	2	0	2	2018-08-01	2018-08-0
Soft Client	Skype for Business 2010 RCCV	م	Vertical Demo	0	0	0	2018-08-01	2018-08-0

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 No. / Title		Vertical Demo							
	503037	Vertical Demo	Change Ord	ler					
Order type / Status	Change	Temp	oorary						
Order Date	2023-10-24 13:18:	11							
Change Date	2023-10-24								
Service Plan	Standard Plan								
Order Note									
Item Group	Order Item		Qty.	Trial per	riod	Billing Account		Comment	
~	x	X					Х		×
User License	Premium iPECS ONE U	SER	-1	0	day(s)	Vertical Demo			

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	Order Final Confirm	
Device Management	Reseller RS Vertical      Vertical      Vertical      Search	
Customers		
Order Management	Order Date Reseller Customer ID Customer Name Order No Order Type Order Status Order Title	x
Order Status	1 2023-10-24 12:54:33 RS-Vertical C000000150 Vertical Demo 503035 Change Approved Vertical Demo Change Order	
Order Approval	φ 2 m κ ( Page 1 of 1 ) >> > 1 10 ···	► View 1 - 1 of 1
Order Final Confirm		Excel
Reseller		

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)	Comme
1		X		Martinal David	0000.00.00	0000.00.00				10	
4	User License	Premium iPECS ONE USER	٩	Vertical Demo	2022-08-02	2022-08-02	0	11	1	12	•
φΞ	45			He we Page 1	of 1 == == 10	~				View	1-1 of 1
Annro	oval Comment										
, ppro											
										al Confirm	Reject
											Neject

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

