Requesting No-Charge Additional Features in iPECS Cloud

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Requesting No-Charge Additional Features

There are many no-charge features that you may need to add to your customers' accounts and that is done within your Reseller Portal. Examples of those features include hunt groups, paging groups, pickup groups, shared lines, and conference rooms.

Begin by logging into your Reseller Portal. Use your credentials to log in.

Once there, click on Customers, then Modify Existing Customer. When you see your accounts, find the page the account you wish to modify is on and click that line, it will highlight blue. Next, click Change Order in the blue bubbles below the customer list.

Vertical								O 2023-12-20 17:12	18 🔘 RS-Vertic	al (Rich Balazsi) Re	seller 🛃
Service Environment	My Home 🕂 🕂										EMS Link >
DDI Number	Modify Existing (Customer									
Device Management	- Reseller * RS-Vertical	×	Include child resellers	· Service Start	m ~	1 Search					
Customers											
Create New Customer	Reseller	Customer ID	Customer Name	Service Plan	Status	Service Start	User License(EA)	Administrator ID	Administrator Name	Manager Portal	Ongoing Orders
Modify Existing Customer		X X		x	×)		×	X	1		
Customer Info.	1 RS-Vertical	C000000009	CM Vertical	IPECS ONE Migration Ser	Activated	2017-08-21 13:34:13	67	admin@cm-vertical.com	Joti Patel	Ð	0 ^
Customer List	2 RS-Vertical	C100000037	SIP Service	SIP Trunk Service Plan	Activated	2022-01-05 16:42:27	0	admin@.com	Toni Elich	Ð	0
Customer List	3 RS-Vertical	C000000374	Test	Standard Plan	Activated		2	admin@richtest	Rich	Ð	0
Customer List	4 RS-Vertical	C100000040	Testco - for digit conversion	Standard Plan	Activated		1	admin@test.co	admin@test.co	Ð	0
Daily Customer Status	5 RS-Vertical	C0000000150	Vertical Demo	Standard Plan	Activated	2018-08-02 09:50:32	39	admin@cm-vertical-demo.con	Kim Macdonald	1 <u>0</u>	0 -
Customer Service Status	0 2 1				Pege	1 of 1					View 1 - 5 of 5
Customer Service Usage											Excel
Items Outside of Trial Period											
Customer Terms and conditions											
Customer Group	Service Start Chang	e Order	Service Resume	Service Plan Change	stomer Close	Un-shipped Device Alloc	Package Up	grade License Change			
Order Management											

Click on Order Items, then find the page that has the item you wish to add. If you don't see it in the Change Current Order Items section, scroll down (see next screenshot below) to New Order Items and then again, find the page the item is on. Click on the Order (+/-) next to the item and select the quantity to request.

ige order										
rder Title & Customer	Site Number Ordering Order Items	runk Channel	Device Ordering Ca	ll Bundle 🔪 Devi	ce Shipping	Info. S	ubmit Order			
Change Current	Order Items									
Item Group	Item Name		Billing Account	Available	Order((+/-)	To Be(EA)	Act. Date	Billing Start	Comment
~	· X	x	X							
Group Feature	Shared Line	٩	Vertical Demo	4	0 🗘	(EA)	4	2018-08-01	2018-08-01	
Group Feature	ACD Group	٩	Vertical Demo	3		0	3	2022-10-27	2022-10-27	
Group Feature	Conference Room	م	Vertical Demo	1		0	1	2018-08-01	2018-08-01	
Analytics	Analytics Advanced Plus Endpoint	م	Vertical Demo	15		0	15	2022-11-11	2022-11-11	ACD Group Us
Analytics	Analytics Advanced Plus Supervisor	م	Vertical Demo	3		0	3	2022-11-11	2022-11-11	
4			Page 4 of 4							View 31 - 35 of 3
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ge Order										
Group Feature	Shared Line	ير	vertical Demo	4	υ.	(EA)	4	2018-08-01	2018-08-01	
Group Feature	ACD Group	٩	Vertical Demo	3		0	3	2022-10-27	2022-10-27	
Group Feature	Conference Room	م	Vertical Demo	1		0	1	2018-08-01	2018-08-01	
Analytics	Analytics Advanced Plus Endpoint	٩	Vertical Demo	15		0	15	2022-11-11	2022-11-11	ACD Group
Analytics	Analytics Advanced Plus Supervisor	٩	Vertical Demo	3		0	3	2022-11-11	2022-11-11	
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New Order Items	\sim									
Item Group	Order Item		Billing Account	Otv	Trial per	iod	Comme	ot		
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Soft Client	MS Teams Connect	Q	Vertical Demo	(00	day(s)				
	1.00 - 1	0	Vertical Demo	0 1 (EA) 0	day(s)				
Call Recording	I GB SIZE			· · · ·						
Call Recording	1 GB SIZE		Vertical Dama			dau(c)				
Call Recording	100 MB size	٩	Vertical Demo	(0 0	day(s)				
Call Recording Call Recording Call Recording	100 MB size Unlimited Size	٩	Vertical Demo	(D 0 D 0	day(s) day(s)				
Call Recording Call Recording Call Recording FAX	100 MB size Unlimited Size WebFax User	۲ ۹ ۹	Vertical Demo Vertical Demo Vertical Demo			day(s) day(s) day(s)				
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Call Recording Call Recording Call Recording FAX ACB ACB	1 US SIZE 100 MB size Unlimited Size WebFax User Audio Conference Bridge-25 Users Audio Conference Bridge-100 Users	2 Q Q Q Q	Vertical Demo Vertical Demo Vertical Demo Vertical Demo Vertical Demo		0 0 0 0 0 0 0 0 0 0	day(s) day(s) day(s) day(s) day(s)				

Once your quantity has been selected, click Submit Order in the top right of the screen.

er Title & Customer S	Site Number Ordering Order Items	Trunk Channel	Device Ordering	Call Bundle Device	Shipping Info	Submit Order	\triangleright	
Change Current (Item Group	Order Items Item Name		Billing Account	Available	Order(+/-)	To Be(EA)	Act. Date	Billing
~	x	х	X	-				
Group Feature	Shared Line	٩	Vertical Demo	4	1 🗘 (EA)	5	2018-08-01	2018-0
Group Feature	ACD Group	P	Vertical Demo	3	0	3	2022-10-27	2022-1
Group Feature	Conference Room	P	Vertical Demo	1	0	1	2018-08-01	2018-0
Analytics	Analytics Advanced Plus Endpoint	R	Vertical Demo	15	0	15	2022-11-11	2022-1
Analytics	Analytics Advanced Plus Supervisor	Q	Vertical Demo	3	0	3	2022-11-11	2022-1

To complete the submission, go to the bottom-right side of the page and click Save & Submit Order.

Cancel Save Order Save & Submit	Order

Once the order has been accepted by Vertical, you will get an e-mail to notify the administrator. See the sample below.

Order Notification_Vertical Demo_Change_Appr	oved			
IC iPECS Cloud To Skimberly Macdonald	🙂 🔶 Reply 🐇	Reply All 🔶	Forward 57	••• 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. Than	nk you for your confirmation.	i 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 : KS-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 needing to be confirmed. This will stay there until you click OK or OK ALL.

Next, click Order Management, then Order Final Confirm. 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 Vinclude child resellers	
Customers		
Order Management	Order Date Reseller Customer ID Customer Name Order No Order No Order Status Order Title	x
Order Status	1 2023-10-24 12:54:33 RS-Vertical C0000000150 Vertical Demo 503035 Change Approved Vertical Demo Change Order	
Order Approval	4	/iew 1 - 1 of 1
Order Final Confirm		Excel
Reseller		

Scroll down to review the list of item(s) requested and 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	User License	Premium iPECS ONE USER	<u>م</u>	Vertical Demo	2022-08-02	2022-08-02	0	11	1	12	
Ф 23	45			re ee Page 1	of 1 => >1 10	~				View	•1-1of1
Appro	oval Comment										
									Fir	nal Confirm	Reject

Click OK to confirm.



The new item will be in the inventory and ready to be added!