

# Requesting No-Charge Additional Features in iPECS Cloud

Last Modified on 12/20/2023 10:28 pm EST



## 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.

	Reseller	Customer ID	Customer Name	Service Plan	Status	Service Start	User License(EA)	Administrator ID	Administrator Name	Manager Portal	Ongoing Orders
1	RS-Vertical	C000000009	CM Vertical	iPECS ONE Migration Ser	Activated	2017-08-21 13:34:13	67	admin@cm-vertical.com	Joti Patel		0
2	RS-Vertical	C1000000037	SIP Service	SIP Trunk Service Plan	Activated	2022-01-05 16:42:27	0	admin@cm.com	Toni Elich		0
3	RS-Vertical	C0000000374	Test	Standard Plan	Activated		2	admin@richtest	Rich		0
4	RS-Vertical	C1000000040	Testco - for digit conversion	Standard Plan	Activated		1	admin@test.co	admin@test.co		0
5	RS-Vertical	C0000000150	Vertical Demo	Standard Plan	Activated	2018-08-02 09:50:22	39	admin@cm-vertical-demo.com	Kim Macdonald		0

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.

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)	Act. Date	Billing Start	Comment
Group Feature	Shared Line	Vertical Demo	4	0 (EA)	4	2018-08-01	2018-08-01	
Group Feature	ACD Group	Vertical Demo	3	0	3	2022-10-27	2022-10-27	
Group Feature	Conference Room	Vertical Demo	1	0	1	2018-08-01	2018-08-01	
Analytics	Analytics Advanced Plus Endpoint	Vertical Demo	15	0	15	2022-11-11	2022-11-11	ACD Group User
Analytics	Analytics Advanced Plus Supervisor	Vertical Demo	3	0	3	2022-11-11	2022-11-11	

Page 4 of 4 | 10 | View 31 - 35 of 35

Change Order

Group Feature	Shared Line	Vertical Demo	4	0 (EA)	4	2018-08-01	2018-08-01	
Group Feature	ACD Group	Vertical Demo	3	0	3	2022-10-27	2022-10-27	
Group Feature	Conference Room	Vertical Demo	1	0	1	2018-08-01	2018-08-01	
Analytics	Analytics Advanced Plus Endpoint	Vertical Demo	15	0	15	2022-11-11	2022-11-11	ACD Group User
Analytics	Analytics Advanced Plus Supervisor	Vertical Demo	3	0	3	2022-11-11	2022-11-11	

Page 4 of 4 | 10 | View 31 - 35 of 35

### New Order Items

Item Group	Order Item	Billing Account	Qty.	Trial period	Comment
Soft Client	MS Teams Connect	Vertical Demo	0	0 day(s)	
Call Recording	1 GB size	Vertical Demo	0 (EA)	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)	
ACB	Audio Conference Bridge-100 Users	Vertical Demo	0	0 day(s)	
User Feature	CTI Call Control	Vertical Demo	0	0 day(s)	

Page 1 of 2 | 10 | View 1 - 10 of 14

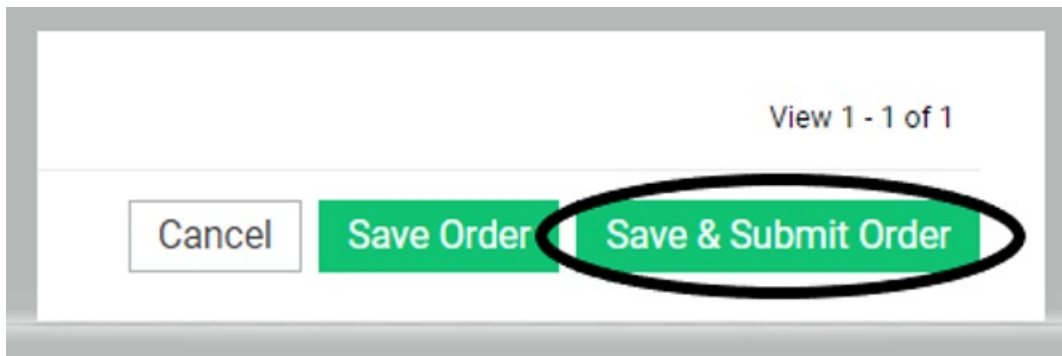
Once your quantity has been selected, click Submit Order in the top right of the screen.

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)	Act. Date	Billing Start	Comment
Group Feature	Shared Line	Vertical Demo	4	1 (EA)	5	2018-08-01	2018-08-01	
Group Feature	ACD Group	Vertical Demo	3	-2 ~ 500	3	2022-10-27	2022-10-27	
Group Feature	Conference Room	Vertical Demo	1	0	1	2018-08-01	2018-08-01	
Analytics	Analytics Advanced Plus Endpoint	Vertical Demo	15	0	15	2022-11-11	2022-11-11	
Analytics	Analytics Advanced Plus Supervisor	Vertical Demo	3	0	3	2022-11-11	2022-11-11	


To complete the submission, go to the bottom-right side of the page and click 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\_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 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.

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

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

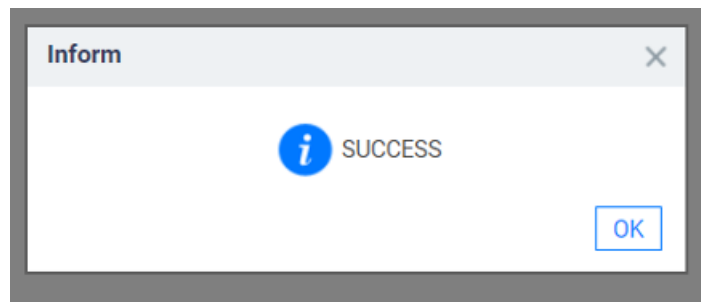
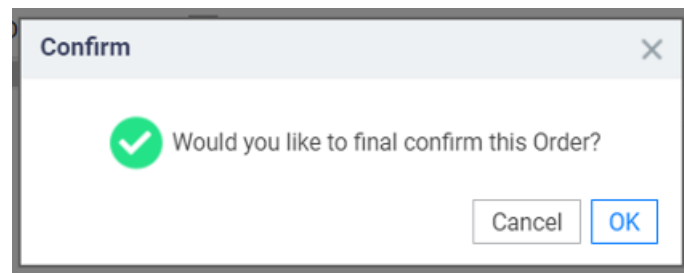
**Order Items**

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

Approval Comment

Final Confirm Reject

Click OK to confirm.



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