



eSpirit PBX/VoIP Guide

Ordering PBX/VoIP Telephone Services

10/2/12

This is a draft of the final Manual expected in 3-4 weeks.

This document was created for the telephone coordinators of the state of South Carolina as a guide to ordering PBX and Voice Over IP telephone services through a web-based portal provided by Spirit Communications. October 2nd, 2012

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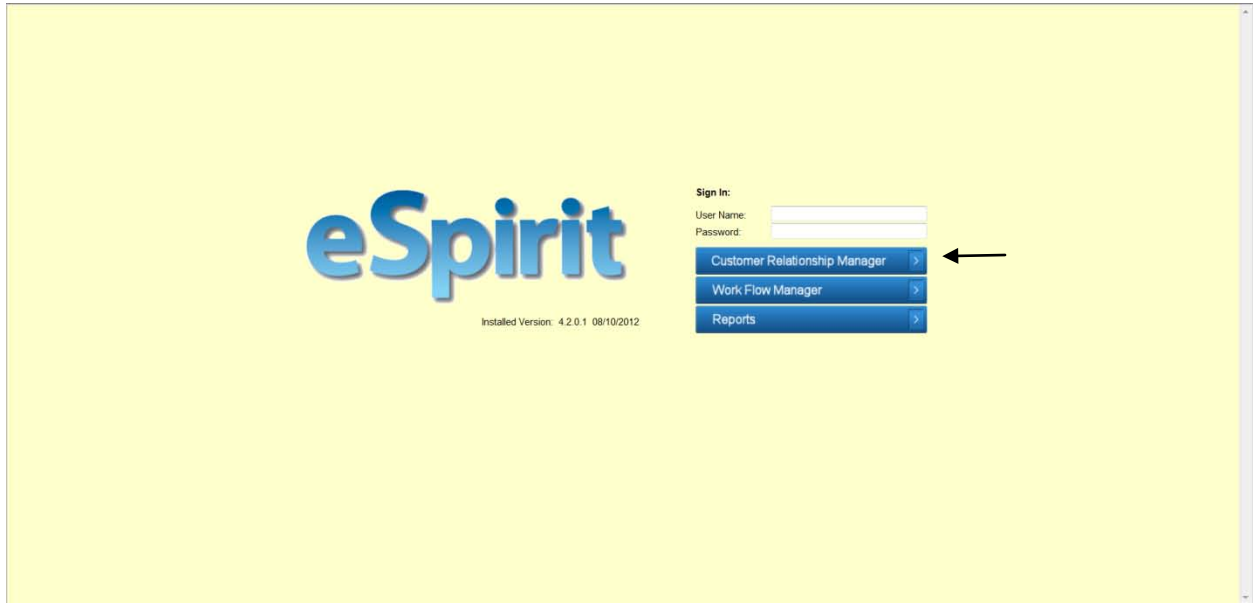
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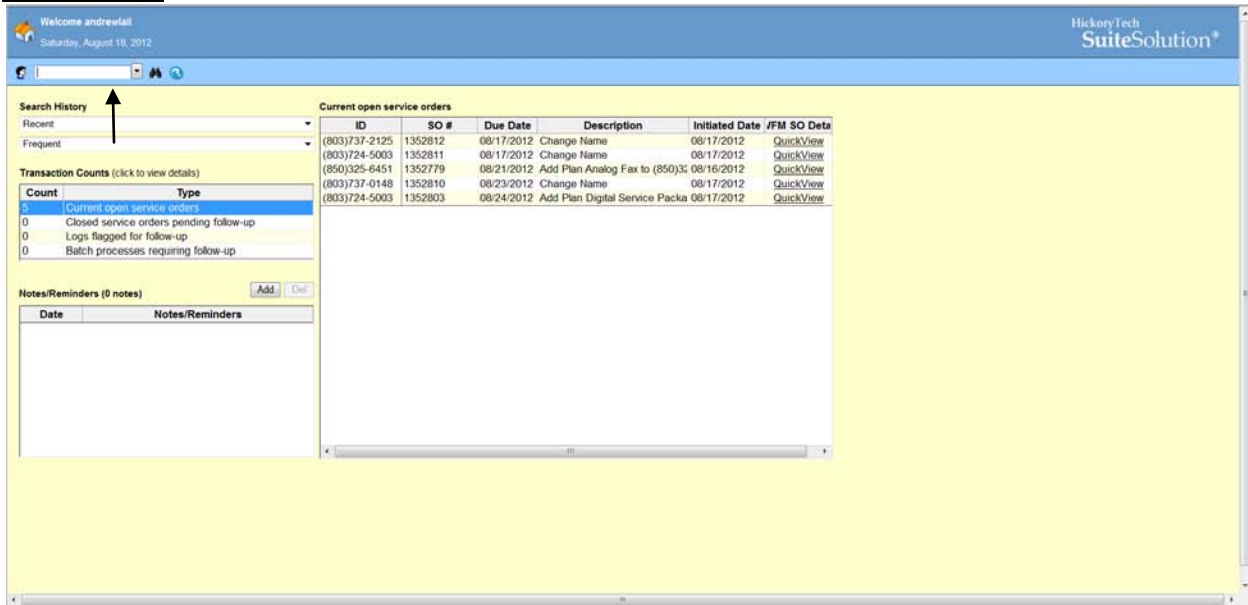
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Accessing The Portal

In your browser use the link <https://scportal.spiritcom.com> to access the portal.
Select "Customer Relationship Manager " to begin issuing orders



Home Screen



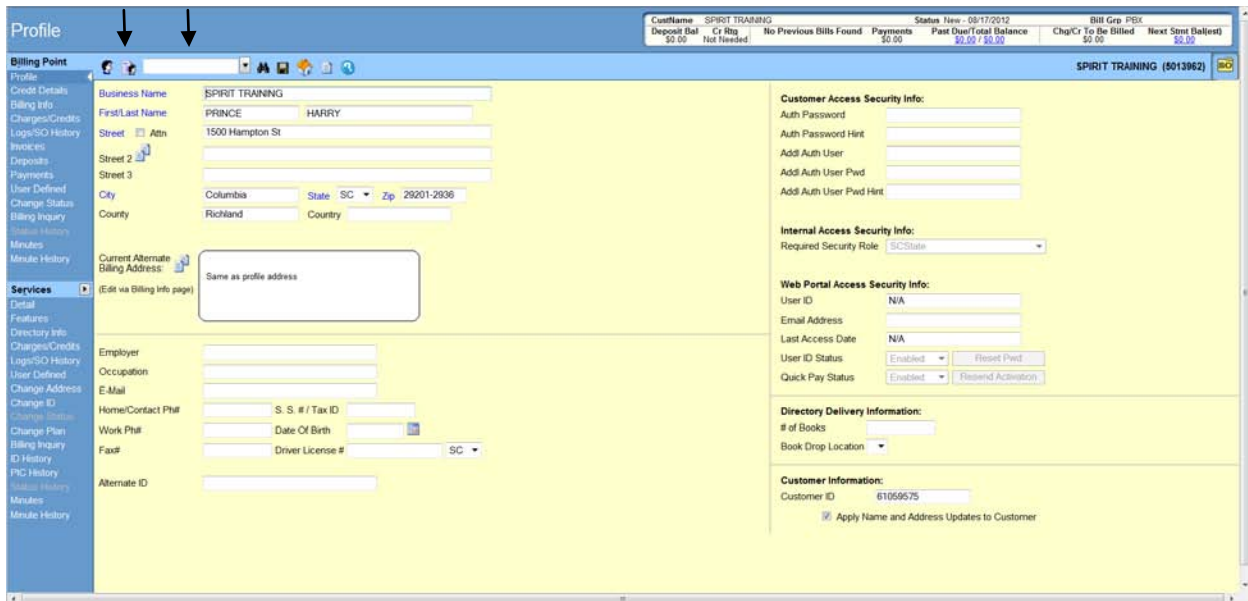
You can view any open orders

Add Special notes/reminders

Enter your account # to search for your agency in the search field.

Add a service

1. Once the account number 5013962(PBX) or 5013963(VoIP) has been entered in the search field press ENTER



Key options on this screen:

Add a service icon(little head)

Return to home screen icon(home)

All the options on left hand side

Once the add service icon is selected a new window is populated

Add Service

Action: New service
 Default information from existing service ID: BPD: 5013962

Subscriber Information:

Business Name: SPIRIT TRAINING

First Name: PRINCE Last Name: HARRY

Internal Name:

House # Suffix Pre-Dir Street Suffix Post-Dir
 1500 Hampton St

Location:

City State Zip County
 Columbia SC 29201-2936 Richland

Class of Service: Voice / Digital Line / PBX

Exemptions/Misc:

Taxation: Inherit From BP
 Federal State
 County Local

Lifeline Type: Non-Lifeline

Min Monthly:

Reason Code:

Directory Information:

Type: NP-Blocks Name & Number

CD Name:

Key options on this screen:

- New service
- Existing service/number
- Correct Name
- Correct Address
- Class of Service
- Directory Information

After completing the appropriate fields select "Next"

Plan: Digital Service Package View/Update Features

Carrier Information:
Carrier: Freeze Effective
PIC 1: 0007 Due Date
PIC 2: 0007 Due Date

ID Information:
ID: 0037245018 Select New NPANXX

Scheduled Start Date: 08/18/2012
Due/Requested In-Service Date: 08/18/2012

Install Instructions:

Go To Directory Info After Saving

<Back Save Cancel

Key options on this screen:

Plan

View/Update Features

Due Dates

Automatically populates a new number

After choosing the correct "plan" you must select the View/Update Features button and enter the correct features. The new window shown below will populate.

Return To Add Plan

M	R	Selected Feature	Amount	From	Through	Billed Through	Back Bill/CR	Pct
*	<input checked="" type="checkbox"/>	Digital Service Package	0.00	Due Date			<input checked="" type="checkbox"/>	1
*	<input type="checkbox"/>	Equipment		Due Date			<input checked="" type="checkbox"/>	1
*	<input type="checkbox"/>	Purchase		Due Date			<input type="checkbox"/>	1
*	<input checked="" type="checkbox"/>	Directory Listing Group		Due Date			<input checked="" type="checkbox"/>	1
*	<input checked="" type="checkbox"/>	DIGITAL PORT		Due Date			<input checked="" type="checkbox"/>	1
*	<input checked="" type="checkbox"/>	Digital Phone Sets		Due Date			<input checked="" type="checkbox"/>	1
*	<input type="checkbox"/>	PHONE_DIGITAL_13169_BLACK		Due Date			<input type="checkbox"/>	1

Filter By: Name Category: All Categories Search Autosearch Remove Add

Available Feature	Category	Amount
COE	Equipment	0.00
DIGITAL DISPLAY MOD W/RAIL/BRA	Digital Phone Sets	0.00
DS 16BT W/O SPKR/DISPLAY	Digital Phone Sets	0.00
DS ISDN 10BT W/DISP/SPKR/MSG B	Digital Phone Sets	0.00
Directory Listing	Directory Listing	0.00
Directory Listing	Directory Listing	0.00
FOREIGN DIRECTO	Digital Service	0.00

Double click on "Digital Service Package" to define services associated with this package.

Feature Details For: Digital Service Package Feature Package Total: \$0.00

Amount: 0.00 Months To Bill: January February March
 April May June
 July August September
 October November December

From: Due Date Mandatory: Recurring:
Through: Billed Through: CRM Category: Digital Service
Quantity: 1 Back Bill/Credit: Billing Category: Loc-features flat recurring
Qty Change Date: Suppress Detail: Created By: Last Updated By:

Feature Includes / Feature Groups

Feature	Amount	From	Through
Equipment - 0 (1/1)	0.00	Due Date	
Directory Listing Group - 0 (0/1)	0.00	Due Date	
DIGITAL PORT	0.00	Due Date	
Digital Phone Sets - 0 (1/1)	0.00	Due Date	

Feature Group Options

Feature	Amount	Weight
COE	0.00	1
Purchase	0.00	1

OK Cancel

Feature Details For: Digital Service Package Feature Package Total: \$0.00

Amount: 0.00 Months To Bill: January February March
 April May June
 July August September
 October November December

From: Due Date Mandatory: Recurring:
Through: Billed Through: CRM Category: Digital Service
Quantity: 1 Back Bill/Credit: Billing Category: Loc-features flat recurring
Qty Change Date: Suppress Detail: Created By: Last Updated By:

Feature Includes / Feature Groups

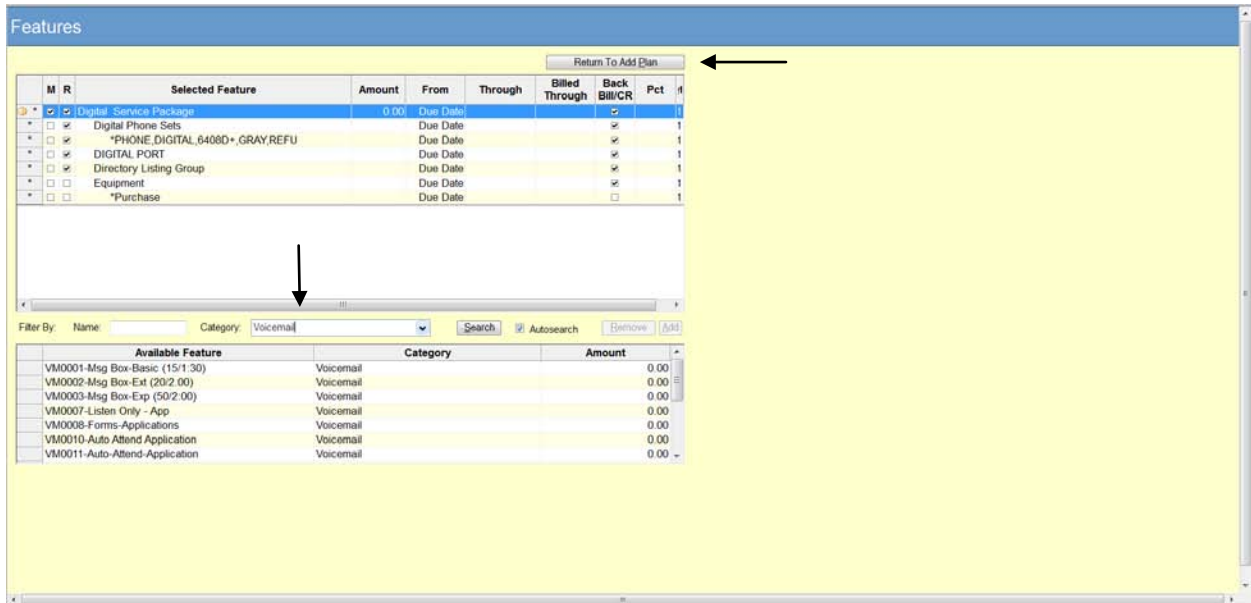
Feature	Amount	From	Through
Equipment - 0 (1/1)	0.00	Due Date	
Directory Listing Group - 0 (0/1)	0.00	Due Date	
DIGITAL PORT	0.00	Due Date	
Digital Phone Sets - 0 (1/1)	0.00	Due Date	

Feature Group Options

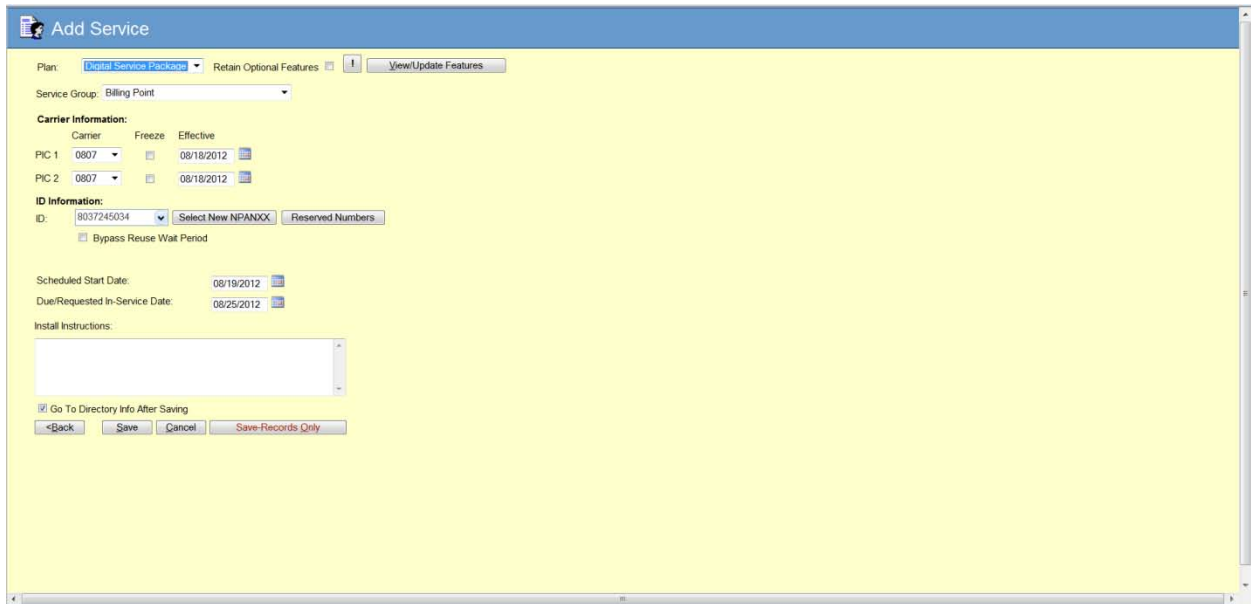
Feature	Amount	Weight
DIGITAL DISPLAY MOD W/RAIL/BRA	0.00	1
DS 16BT W/O SPKR/DISPLAY	0.00	1
DS ISDN 10BT W/DISP/SPKR/MSG B	0.00	1
PHONE,DIGITAL,13169,BLACK	0.00	1
PHONE,DIGITAL,18D,EURO GEN2,BL	0.00	1
PHONE,DIGITAL,2420,GRAY	0.00	1
PHONE,DIGITAL,2420,GRAY,REFURB	0.00	1
PHONE,DIGITAL,6408,WHITE,REFUR	0.00	1
PHONE,DIGITAL,6408D+,GRAY,REFU	0.00	1
PHONE,DIGITAL,6408D+,WHITE,REF	0.00	1
PHONE,DIGITAL,6416D+,GRAY,REFU	0.00	1
PHONE,DIGITAL,6424D+,GRAY,REFU	0.00	1
PHONE,DIGITAL,7403D01B,BLACK,R	0.00	1

OK Cancel

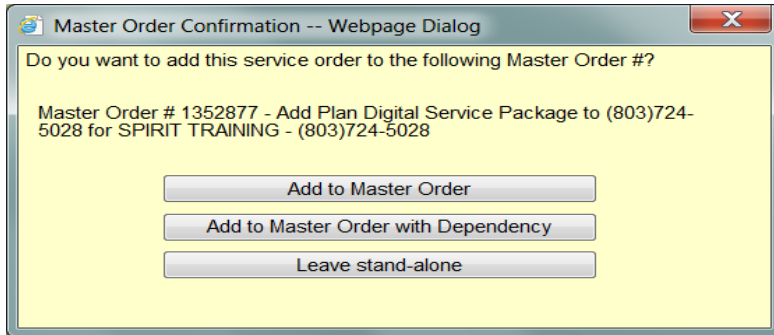
After the phone of choice has been selected click, "OK" which takes you back to the features window where you can add VOICEMAIL and other features. Once satisfied select, "Return To Add Plan."



Select a "Scheduled Start Date" and a "RDD", then SAVE!!



You have few options after you save it. A window is populated requesting details of the order.

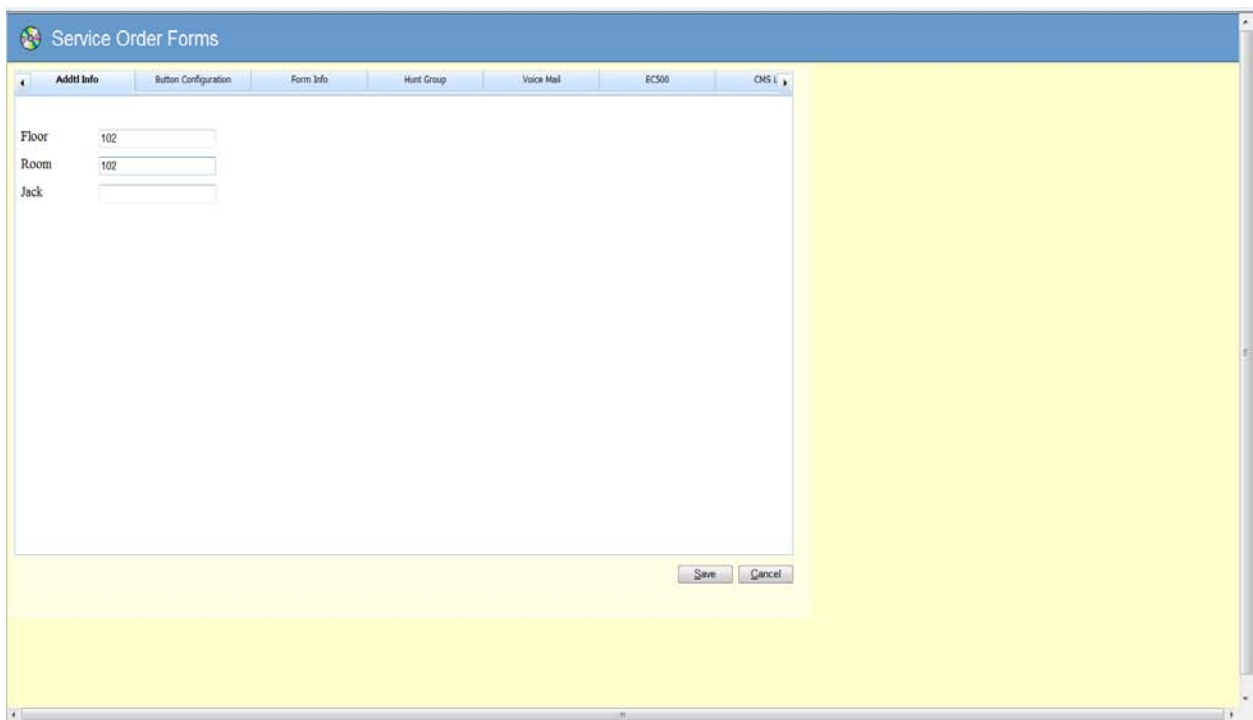


Master Order Confirmation -- Webpage Dialog

Do you want to add this service order to the following Master Order #?

Master Order # 1352877 - Add Plan Digital Service Package to (803)724-5028 for SPIRIT TRAINING - (803)724-5028

Once you select how you want to add the service, orders forms will appear.



Service Order Forms

Buttons: Add Info, Button Configuration, Form Info, Hunt Group, Voice Mail, EC500, CMS I

Floor: 102

Room: 102

Jack:

Service Order Forms

Addtl Info | Button Configuration | Form Info | Hunt Group | **Voice Mail** | EC500 | CMS L

Temporary Password

Zero "0" Outpoint

Comments

Save Cancel

Service Order Forms

Addtl Info | Button Configuration | **Form Info** | Hunt Group | Voice Mail | EC500 | CMS L

Call Pick-Up Group Details

Existing Group

Yes Provide 1 10 digit number from existing group.

1

No Provide 1-12 10 digit number(s) from new group.

1

2

3

4

5

6

7

8

9

10

11

12

Coverage Path Details

Points	# of Rings	Path Number/User Name
1	4	VM
2	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>
6	<input type="text"/>	<input type="text"/>

Switch Port

Current Switch Port

New Switch Port

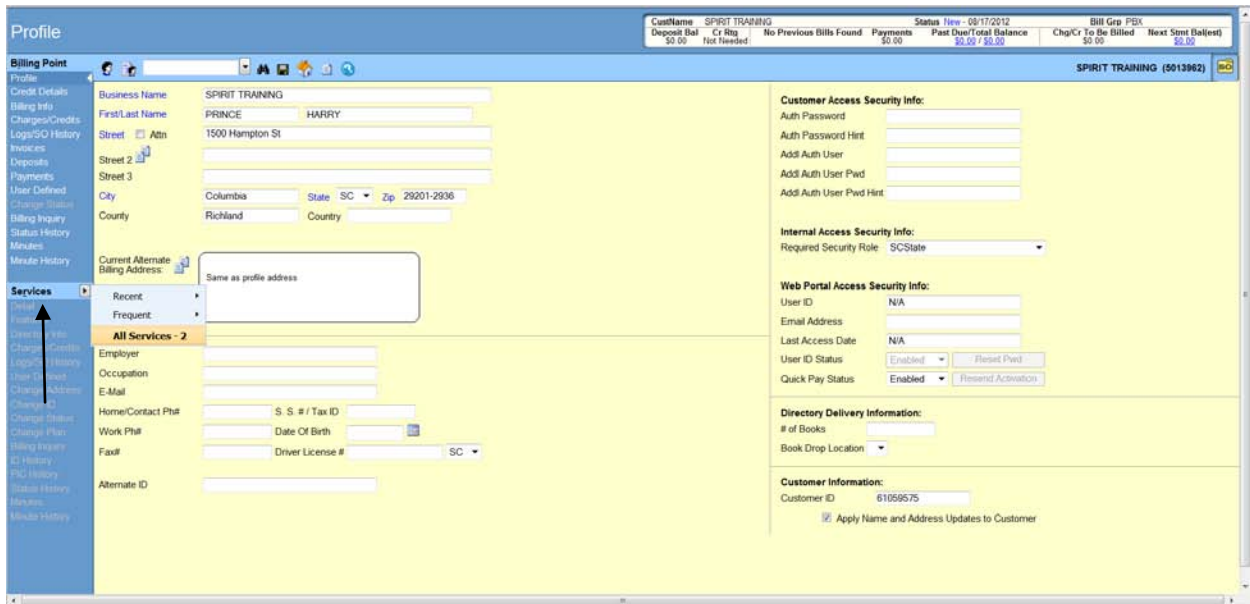
Save Cancel

Select "Save" once ready to create

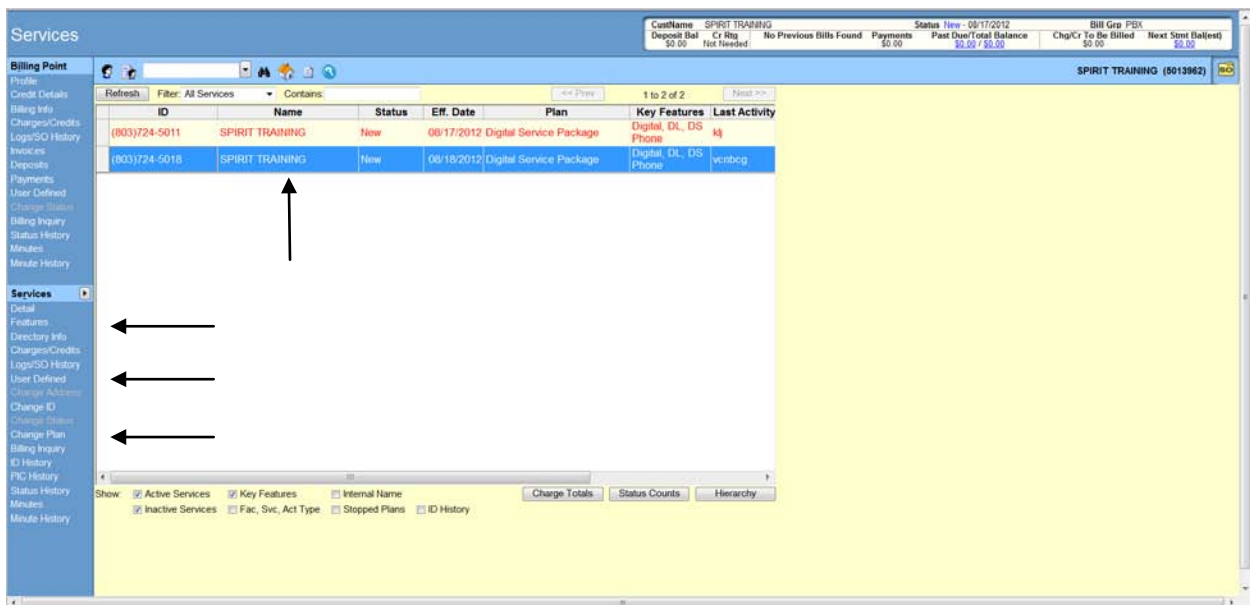
You can view this order at the home page under open orders. Under QuickView it outlines the workflow progress

Changes: Names, Features(Phones,VM etc.), Reset VM

1. Begin search by typing in the phone number at the home page.
2. Begin search by using the account number if you do not know the phone number.



Once at the profile view select services and then All Services
This populates a list of all the numbers associated with this agency and you can then select the different options on the left hand side to make the desired changes.



Double click on the phone to make a change.
 Select VM and remove button to remove it.
 Select save disk icon once finished

The screenshot shows a software interface with a 'Features' section. At the top, there are fields for 'CustName' (SPIRIT TRAINING), 'Status' (New - 08/18/2012), and 'Bill Grp' (PEX). Below this is a table of features with columns: M, R, Selected Feature, Amount, From, Through, Billed Through, Back Bill/CR, and Pct. The table contains several rows, with the row 'VM0032-Listen Only (75/5-00)' highlighted in blue. Below the table, there is a 'Filter By' section with a 'Name' field, a 'Category' dropdown (set to 'All Categories'), and buttons for 'Search', 'Autosearch', and 'Remove'. Below the filter section is another table titled 'Available Feature' with columns for 'Available Feature', 'Category', and 'Amount'. This table lists various features like 'COE', 'DIGITAL DISPLAY MOD W/RAIL/BRA', etc., with their respective categories and amounts.

A new window populates requesting a due date

The screenshot shows a 'Due Date' dialog box. It has a title bar with a globe icon and the text 'Due Date'. Inside the dialog, there are two date fields: 'Scheduled Start Date' with the value '08/18/2012' and 'Due Date' with the value '08/18/2012'. Below these fields is a large, empty text area labeled 'Installation Instructions:'. At the bottom of the dialog, there are four buttons: 'Save', 'Back/Edit', 'Cancel', and 'Save-Records Only'.

Move

Move to a different Sub-Account/department within the same agency

Click on services tab

Profile

CustName SPIRIT TRAINING Status New - 08/17/2012 Bill Grp PEK
Deposit Bal \$0.00 Cr Rtg Not Needed No Previous Bills Found Payments \$0.00 Past Due/Total Balance \$0.00 / \$0.00 Chg/Cr To Be Billed \$0.00 Next Stmt Bal(est) \$0.00

Billing Point SPIRIT TRAINING (5013962)

Business Name SPIRIT TRAINING
First/Last Name PRINCE HARRY
Street 1500 Hampton St
Street 2
Street 3
City Columbia State SC Zip 29201-2936
County Richland Country

Current Alternate Billing Address: Same as profile address

Employer
Occupation
E-Mail
Home/Contact Ph# S. S. # / Tax ID
Work Ph# Date Of Birth
Fax# Driver License # SC
Alternate ID

Customer Access Security Info:
Auth Password
Auth Password Hint
Add Auth User
Add Auth User Pwd
Add Auth User Pwd Hint

Internal Access Security Info:
Required Security Role SCState

Web Portal Access Security Info:
User ID N/A
Email Address
Last Access Date N/A
User ID Status Enabled Reset Pwd
Quick Pay Status Enabled Renewal Activation

Directory Delivery Information:
of Books
Book Drop Location

Customer Information:
Customer ID 61059575
 Apply Name and Address Updates to Customer

Select who you are wanting to move and then select detail

Services

CustName SPIRIT TRAINING Status New - 08/17/2012 Bill Grp PEK
Deposit Bal \$0.00 Cr Rtg Not Needed No Previous Bills Found Payments \$0.00 Past Due/Total Balance \$0.00 / \$0.00 Chg/Cr To Be Billed \$0.00 Next Stmt Bal(est) \$0.00

Billing Point SPIRIT TRAINING (5013962)

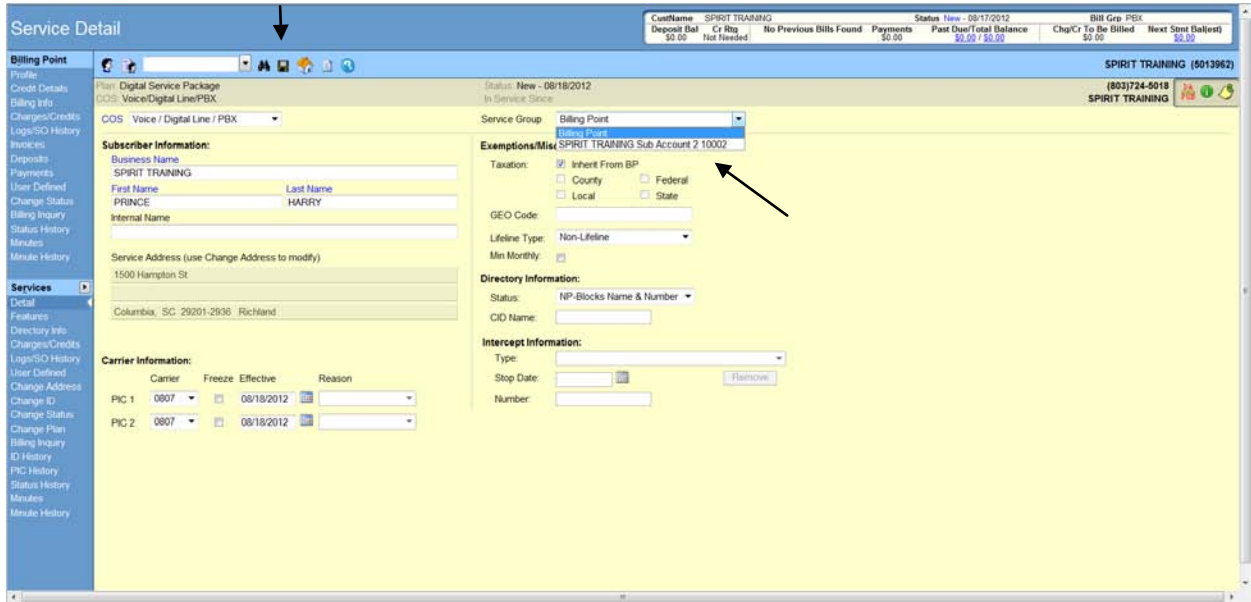
Refresh Filter: All Services Contains: 1 to 5 of 5

ID	Name	Status	Eff. Date	Plan	Key Features	Last Activity
(803)724-5011	SPIRIT TRAINING	New	08/17/2012	Digital Service Package	Digital, DL, DS Phone	kt
(803)724-5018	SPIRIT TRAINING	New	08/18/2012	Digital Service Package	Digital, DL, DS Phone	vcnrbg
(803)724-5023	SPIRIT TRAINING	New	08/24/2012	Digital Service Package	Digital, DL, DS Phone	
10001	SPIRIT TRAINING Sub	New	08/29/2012	Sub Account		
10002	SPIRIT TRAINING Sub	New	08/19/2012	Sub Account		

Show: Active Services Key Features Internal Name Inactive Services Fac, Svc, Act Type Stopped Plans ID History

Charge Totals Status Counts Hierarchy

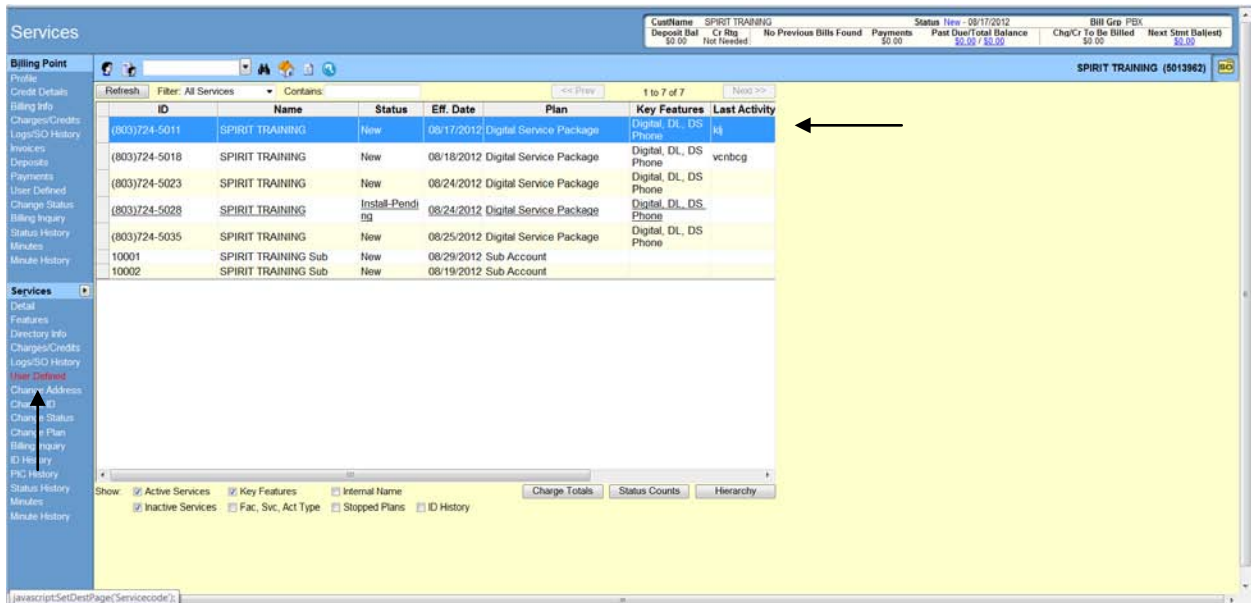
Select a different Service group(Sub Account) and click the disk icon to save
 The Change happens automatically. No SO is created



Move: Room and Floor Number

After typing in your account number at the home page, press ENTER

In the next window select "Services," then highlight the number you want to make the change too.
 Select "User Defined," which will allow you to make changes to the floor and room numbers



User Defined

User Defined Fields

CustName: SPIRIT TRAINING Status: New - 08/17/2012 Bill Grp: PEX
 Deposit Bal: \$0.00 Cr Rtg: Not Needed No Previous Bills Found Payments: \$0.00 Past Due/Total Balance: \$0.00 / \$0.00 Chg/Cr To Be Billed: \$0.00 Next Stmt Bal(est): \$0.00

Plan: Digital Service Package Status: New - 08/25/2012 SPIRIT TRAINING (5013962)
 Desc: Voice/Digital Line/PBX In Service Since: (803)724-5035
 SPIRIT TRAINING

Optional User Defined Fields: * = Field populated but incompatible with current profile

Category	User Defined Field	Value
Populated Fields Only		
Phone Set	Button1	CA
Phone Set	Button2	CA
Phone Set	Button3	CA
Phone Set	Button4	SAC
Customer Prem	Prem Floor	102
Customer Prem	Prem Room	102

Services

- Detail
- Features
- Directory Info
- Changes/Credits
- Logs/SO History
- User Defined
- Change Address
- Change ID
- Change Status
- Change Plan
- Billing Inquiry
- ID History
- PC History
- Status History
- Minutes
- Minute History

Disconnect:

From the service detail page select change status

The screenshot shows the 'Service Detail' page for a customer named 'SPIRIT TRAINING'. The page is divided into several sections:

- Header:** Displays account information including 'CustName: SPIRIT TRAINING', 'Status: New - 08/17/2012', and 'Bill Gro: PBX'. It also shows financial details like 'Deposit Bal: \$0.00', 'Cr Req: Not Needed', 'No Previous Bills Found', 'Payments: \$0.00', 'Past Due/Total Balance: \$0.00 / \$0.00', 'Chg/Cr: To Be Billed', and 'Next Stmt (Est): \$0.00'.
- Left Navigation:** A vertical menu with options like 'Billing Point', 'Profile', 'Credit Details', 'Billing Info', 'Changes/Credits', 'Logs/SO History', 'Invoices', 'Deposits', 'Payments', 'User Defined', 'Change Status', 'Billing Inquiry', 'Status History', 'Minutes', and 'Minute History'. The 'Change Status' option is highlighted with a mouse cursor.
- Main Content Area:**
 - Subscriber Information:** Fields for Business Name (SPIRIT TRAINING), First Name (PRINCE), Last Name (HARRY), Internal Name, and Service Address (1500 Hampton St, Columbia, SC 29201-2936, Richland).
 - Carrier Information:** A table with columns for Carrier, Freeze, Effective, and Reason. It lists two PICs (PIC 1 and PIC 2) with carrier '0807' and effective dates of '08/18/2012'.
 - Exemptions/Misc:** Includes 'Taxation' (Inherit From BP, County, Local, State), 'GEO Code', 'Lifeline Type' (Non-Lifeline), and 'Min Monthly'.
 - Directory Information:** Fields for Status (NP-Blocks Name & Number) and CID Name.
 - Intercept Information:** Fields for Type, Stop Date, and Number.

Specify Reason code, due date, Intercept information and then press save

The screenshot shows the 'Change Status' page for the same customer. The page is divided into several sections:

- Header:** Displays account information including 'Plan: Digital Service Package', 'CO: Voice/Digital Line/PBX', 'Status: New - 08/18/2012', and 'In Service Since:'. It also shows the account number '(803)724-5018' and the customer name 'SPIRIT TRAINING'.
- Main Content Area:**
 - New Status/Date:** A dropdown menu set to 'Disconnect' and a date field set to '08/24/2012'.
 - Reason Code:** A dropdown menu set to 'Admin-Cleanup'. Below it are checkboxes for 'Generate Partial Charges', 'Customer Requested', and 'Flag as Delinquent'.
 - Intercept Information:** Fields for Type (Customized - Spirit Creates with script from Cust), Stop Date (08/24/2012), and Number.
 - Service Order/Installation Information:** Fields for Scheduled Start Date (08/18/2012), Due Date (08/24/2012), and Install Instructions.
- Buttons:** 'Cancel', 'Save', and 'Save-Records Only' buttons are located at the bottom of the page.