

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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Accessing The Portal

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

eSpirit Installed Version: 42.01.0810/2012	Sign In: User Name: Password: Customer Relationship Manager Work Flow Manager Reports

Home Screen

Search History		Current open ser	rvice orders					
Recent		ID	SO #	Due Date	Description	Initiated Date	FM SO Deta	
Frequent						08/17/2012	QuickView	
Transaction Counts (clic		(803)724-5003 (850)325-6451 (803)737-0148	1352779	08/21/2012	Add Plan Analog Fax to (850)3:	08/17/2012 08/16/2012 08/17/2012	QuickView QuickView QuickView	
Count	Type service orders	(803)724-5003			Add Plan Digital Service Packa		QuickView	
0 Logs flagged	ses requiring follow-up	-						
Date	Notes/Reminders	i l						
		×1			- 40			

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

Barly Thought First Last Name PRINCE HARRY Logis SO Halvy Street 1 Attin 1500 Hampion St Proces Barly Harry Street 2 1 Street 3 Street 3 1	SPIRIT TRAINING (\$013952) Customer Access Security Info: Auth Password Auth Password Heit Add Auth User Add Auth User Pad iant Add Auth User Pad iant
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Change Dian Home/Contact Ph# S. S. # / Tax (D Change Plan Work Ph# Date Of Birth Billing hourty D (Heatory PIC) Heatory Fax# Driver License # SC. ● PIC Heatory Atternate ID Exemption Exemption Exemption	Directory Delivery Information: # of Books Book Drop Location Customer Information: Customer ID 6059575 Reply Name and Address Updates to Customer

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

 New service Default inform 	nation from existing service	D BP	10 5013962	Refresh	
iber Information: ness Name IT TRANNG Name ICE all Name e # Suffix Pre-Dir hon	Last Name HARRY Street Hampton State Zp CC	Suffix Post-De St	Exemptions/Misc Taxation Lifeline Type: Min Monthly	k bhert From BP Gedeal State County Local Non-Lifeline	Cancel
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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"

Add Service	ł
Plan Digital Service Package • 1 VewUpdate Features	
Carrier Information:	
Carrier Freeze Effective PIC1 0007 Due Date	
PIC2 0007 • 🗈 Due Date	
ID Information:	
D 9037245018 v Select New NPANOX	
Scheduled Start Date: 00/18/2012	
Due/Requested in-Service Date: 08/18/2012	
Instal Instructions:	
12 Go To Directory Mile After Saving	
-Back Save Cancel	
ey options on this screen:	
an	
ew/Update Features	
ue 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.

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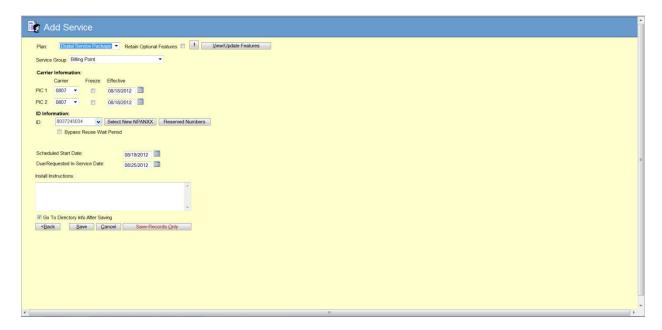
Double click on "Digital Service Package" to define services associated with this package.

Feature Details Webpage Dialog								X
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Digital Service Package								
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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."

					Ret	im To Add	Plan
MR	Selected Feature	Amount	From	Through	Billed	Back Bill/CR	Pct
	gital Service Package	0.0					
0 2	Digital Phone Sets		Due Date			8	1
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0.8	DIGITAL PORT		Due Date			8	1
110	Directory Listing Group		Due Date			8	3
00	Equipment		Due Date			8	
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VM0001 VM0002 VM0003 VM0007 VM0008	Available Feature Msg Box-Basic (15/1:30) Msg Box-Ext (20/2:00) Listen Only - App Forms-Applications	Voicemail Voicemail Voicemail Voicemail Voicemail		Search ı	in the second second		• 600 0.00 0.00 0.00 0.00 0.00
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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
Add to Master Order
Add to Master Order with Dependency
Leave stand-alone

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

🛞 Servi	ice Order Forms					
• Addtl In		Form Info	Hunt Group	Voice Mail	EC500	ous i 🖡
Floor	102					
Room Jack	102					
					Sav	e <u>C</u> ancel
*						

😵 Service O	rder Forms					
4 Addti Info	Button Configuration	Form Info	Hunt Group	Voice Mail	EC500	0151,
Temporary Password						
Zero "0" Outpoint	803-737-4512	3				
Comments		2				
					Save	Gancel
					- 1 	

s Provide 1 10 digit number from existing group. Points # of Rings Path Number/User Name 1 4 VM 2	Addti Info	Button Configuration	Form Info	Hunt Group	Voice Mail	EC500	CHS LC ,
Current Switch Port	Call Pick-Up Gro Existing Group (és No	Provide 1 10 digit numbe		Points 1 2 3 4 5	# of Rings		Name
	8 9 10 11 12			Current Swit	tch Port		

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.

Profile				CustName SPIRIT TRAINING Deposit Bal Cr Rtg No Previous Bills Found \$0.00 Not Needed	Status New - 08/17/2012 Payments Past Due/Total Balanc \$0.00 \$0.00 / \$0.00	Bill Grp PEX e Chg/Cr To Be Billed Next Stmt Bal(est) \$0.00 \$20.00
Billing Point	0 2	🖢 🗛 🖬 餋 🗈 🕥				SPIRIT TRAINING (5013962)
Prome Credit Details Billing Info Charges/Credits Logis/SO History Invoccis Deposits Payments User Defined Charge Figure Billing Inquiry Status History Status History Mendes	Business Name First/Last Name Street Attn Street 2 Street 3 City County	SPIRIT TRAINING PRINCE HARRY 1500 Hempton St Columbia State SC • z Richland Country	Zip 29201-2936	Customer Access Auth Password Auth Password Hint Add Auth User Pwd Add Auth User Pwd Add Auth User Pwd Internal Access 52	Hint	
Mendeen Mende History Services	Current Alternate Billing Address Recent Frequent	Same as profile address		Required Security R Web Portal Access User ID Email Address		
Charge Contin Logo Contin Dary Manuel Charge Address Charge C	All Services - 2 Employer Occupation E-Mail Home/Contact Ph#	SS≢/TaxiD		Last Access Date User ID Status Quick Pay Status Directory Delivery	N/A Enabled • Resent Activat	
	Work Phil Faxili Alternate ID	Date Of Birth Driver License #	SC *	# of Books Book Drop Location Customer Informat Customer ID		ner,

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.

Billing Pairds Crinds Frake: Al Services Crinds Frake: Al Services Containe:	Services							CustName S Deposit Bal \$0.00 N	PIRIT TRAINING Cr Rtg No P lot Needed	evious Bills Found	Status New Paymonts Past Du \$0.00 \$0	- 08/17/2012 e/Total Balance	Bill Grp P Chg/Cr To Be Billed \$0.00	BX Next Strat E \$2.00
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Double click on the phone to make a change. Select VM and remove button to remove it. Select save disk icon once finished

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A new window populates requesting a due date

🚱 Due Date				
Scheduled Start Date: 08/18/2012				
Due Date: 08/18/2012				
Installation Instructions:				
	^			
Save Back/Edit Cancel S	ave-Records Only			
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Move Move to a different Sub-Account/department within the same agency Click on services tab

Billing Point			A						-	TRAINING (5013
Profile	9 10		餋 🗈 🔇			 			SPIRIT	TRAINING (2013)
Credit Details Billing Info	Business Name	SPIRIT TRAINING				Customer Access Sec	surity Info:			
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Select who you are wanting to move and then select detail

vices							CustName S Deposit Bal \$0.00 N	SPIRIT TRAINING Cr Rtg No lot Needed	Previous Bills Found	St Payments \$0.00	atus New - 08/17/2012 Past Due/Total Balance \$0.00 / \$0.00	Bill Grp PE0 Chg/Cr To 8e Billed \$0.00	Next Stmt Balle \$2.00
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ts fined	(803)7	24-5023	SPIRIT TRAINING	New	08/24/2012 Digital S	ervice Package	Digital, DL, DS Phone						
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			Key Features Fac, Svc, Act Type	Internal Name Stopped Plans	D 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

Service D	etail 🗸	Countiame SPRICT TRAINING Status Iterr - 0917/2012 Bitl Gro PBX Deposit Bid Cr Rb 50.00 No Previous Bills Found Paymonts 50.00 Paymonts South Status Iterr - 0917/2012 Bitl Gro PBX 50.00 PL No Previous Bills Found Paymonts 50.00 South Status Iterr - 0917/2012 Bitl Gro PBX
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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

Ordan Hol Hol Korristi Bo Haars O Name Cortans Cortans File No No<	Services					CustName Deposit Bal \$0.00	PIRIT TRAINING Cr Rtg No Previ of Needed	s Bills Found	State Payments State 50.00	n New - 08/17/201 Past Due/Total Ba \$0.09 / \$0.09	Bill Grp Pf /Cr To Be Billed \$0.00	
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User Defined

User Defin	ned Fields			CustName SPIRIT TRAINING Deposit Bal Cr Rtg \$0.00 Not Needed No Previous Bills	Found Payments Past Duo/Total Balance \$0.00 / 50.00	Bill Gep PBX Chg/Cr To Be Billed Next Stmt Bal(est) \$0.00 \$2.00
Billing Point	5 B A 6	a 🎲 🗈 😡				SPIRIT TRAINING (5013962)
Credit Details Billing Info	Plan: Digital Service Package COS: Voice/Digital Line/PBX		Status: New - 08/25/2012 Il Gervice Since			(803)724-5035 SPIRIT TRAINING
	Optional User Defined Fields: *= Field	d populated but incompatible with current profile		- 19		
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Disconnect:

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From the service detail page select change status

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

Change S	idius		
tan Digital Service 205 Voice/Digital	e Package Line/PBX	Datus New - 08/18/2012 In Service Ence	
New Status/Date	Disconnect ·	08/24/2012	
Reason Code	Admin-Cleanup	*	
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