SETTING UP MICROSOFT TEAMS USING THE IPILOT PORTAL

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Executive Summary

This document is intended to walk you through the complete process of setting up Microsoft Teams with Direct Routing using Veracity Vconnect Portal.

The document will cover prerequisites, how to acquire numbers, how to set up your Microsoft tenant and Teams using our automated system, as well as provisioning and deprovisioning numbers for users within your environment.

Prerequisites and Disclaimers

You will need the following to get started with Vconnect:

- A Microsoft Office 365 Tenant, and an account with Global Administrator Privileges there.

- At least 2 E3 and Phone User licenses, for the test accounts created during setup (These can be decommissioned later)

- Any one of the following for each user you intend to purchase and assign a number to:

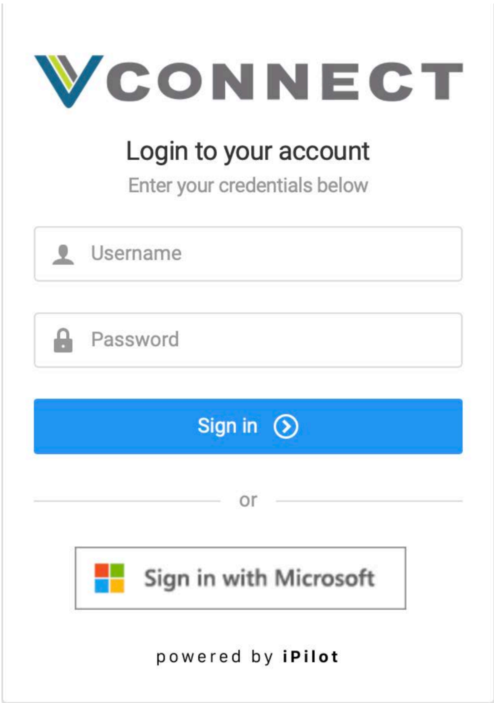
    - Microsoft E5 license
    - Microsoft E3 license and a Phone User License
    - Microsoft E1 license and a Phone User License
    - M365 business standard
    - M365 bunisess premium
    - (Optional) A Microsoft Audio Conferencing license for any user who will need to start an audio conference with outside PSTN access

- Accounts that are being provisioned must not currently have Microsoft numbers or Call Plans allocated to them via Skype for Business or Teams.

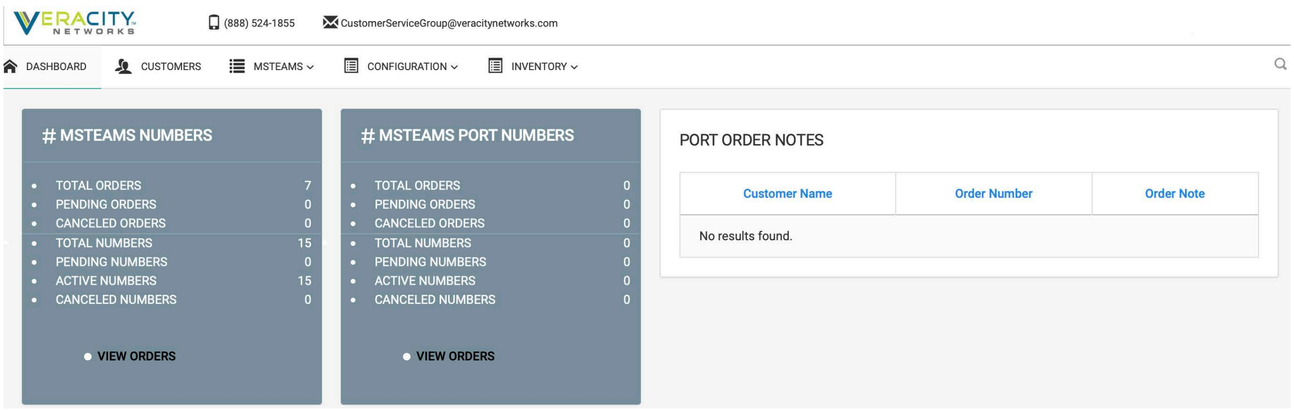
- If users are currently or have previously been assigned Skype for Business licensing, please contact us to confirm the accounts are correctly prepared to be provisioned.

Logging Into the Vconnect Portal for the First Time

1. You should have received an email from Veracity containing your login to the Vconnect portal located at: https://vconnect.veracityteams.com/index.php/site/login



2. After logging in you will arrive at a status screen:



Adding Service to your Account

There are five ways to provision numbers to your Vconnect account to later attach to Teams user accounts:

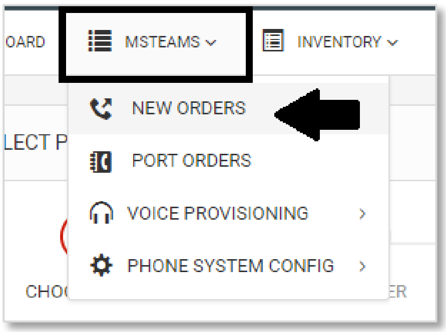
1. Adding New MsTeams Service with New Numbers
2. New Teams Service with Ported Numbers from Other Carriers
3. Adding New Numbers without Trunks or Users
4. Porting Existing Numbers without Trunks or Users
5. Adding Additional Trunks without adding any other services

Below are step by step instructions for each type of order.

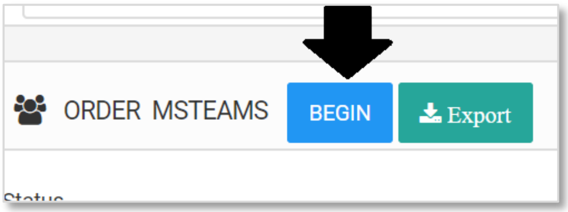
In some cases, your provisioner at Veracity may have already started the initial provisioning process on your account to port or order new numbers. In this case, please skip forward to the section "Setting up your Account for Automated Onboarding"

Adding New MsTeams Service with New Numbers

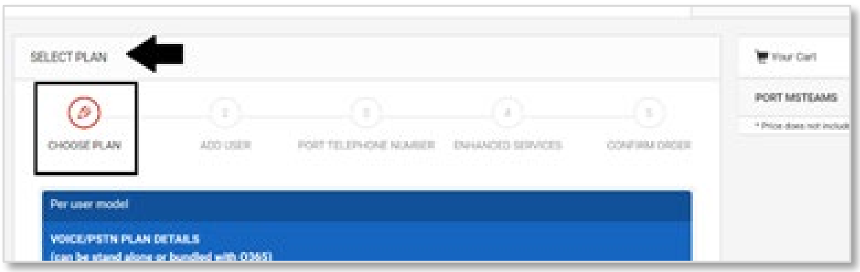
1. Once you are logged in, you will see the main dashboard. To start a MsTeams new DID request, click on "MSTEAMS" at the top of your Dashboard and then select "New Orders":



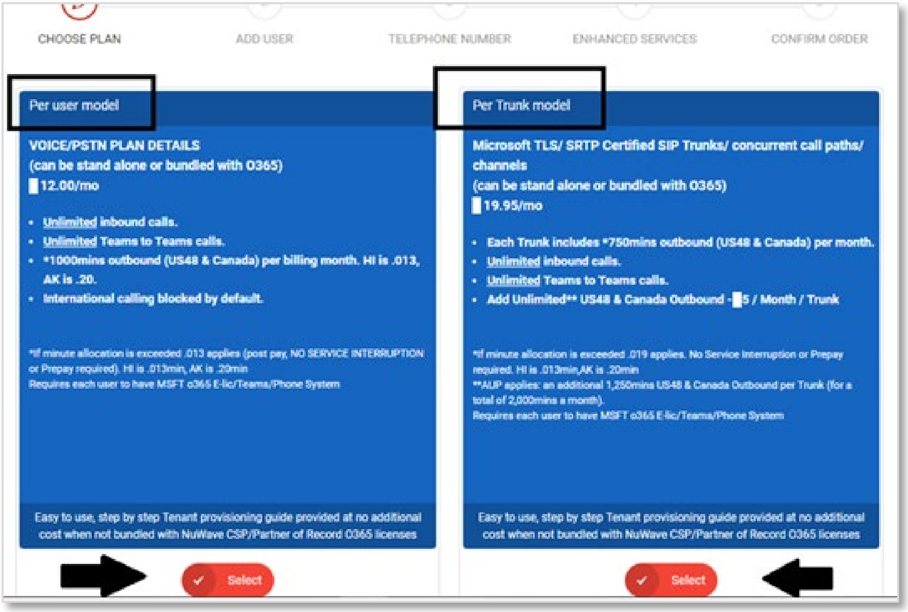
2. This will bring you to the ordering screen where you can view previous orders and start a new order. To start a new DID order, select "Begin" in the upper right hand corner:



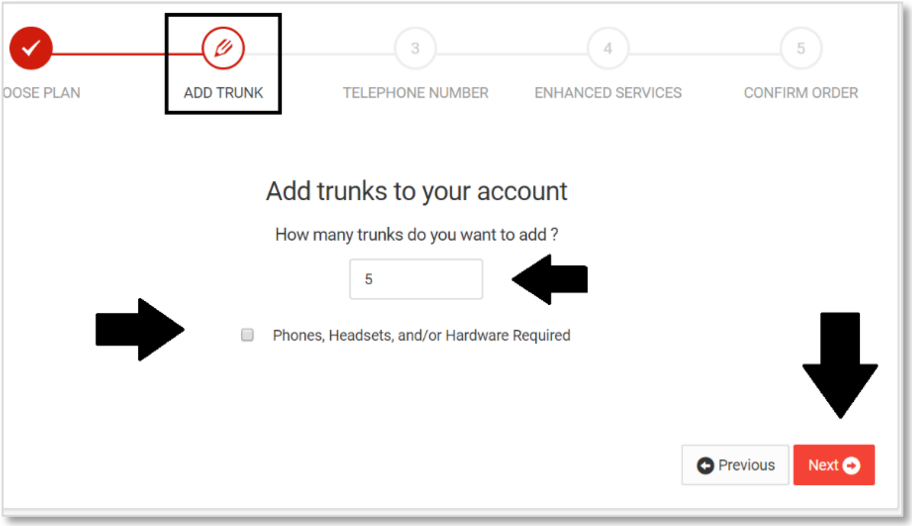
3. Now choose your Teams plan. You may choose between your "Per Customer" Plan or "Per Trunk" plan:



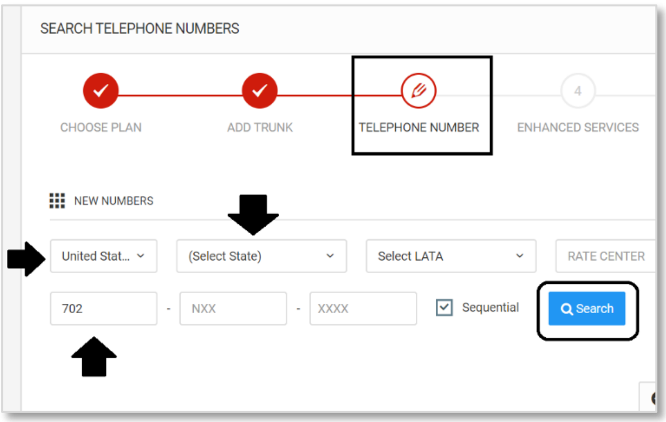
Select your plan. Click "Select" under the plan of your choosing:



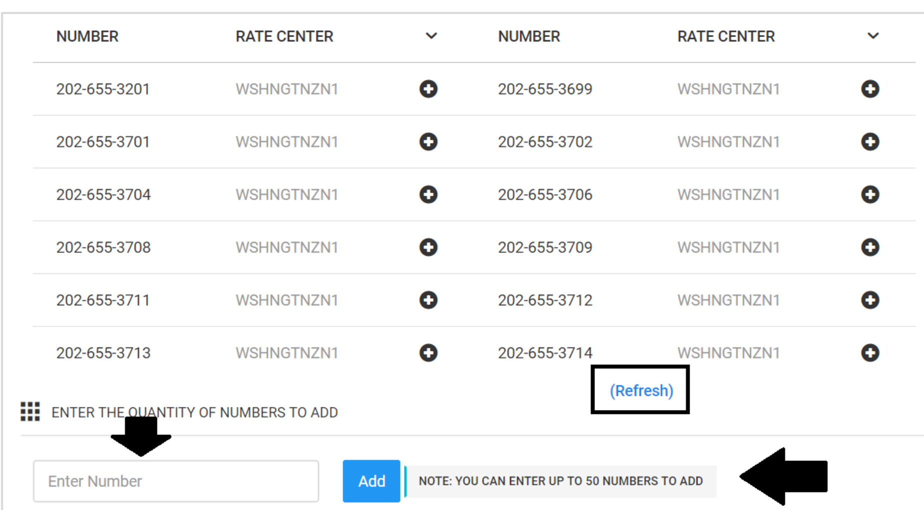
4. Now you will choose the number of trunks or users based on the model you selected. Here we have trunks. Enter the quantity you want to order. If you wish to order hardware or add unlimited calling plan, check the box that applies. Once finished, select "Next":



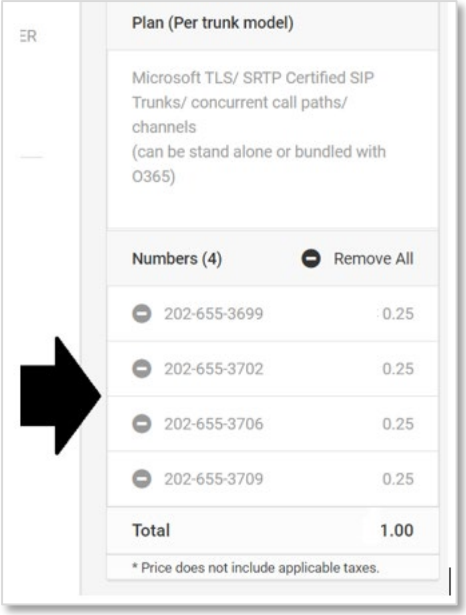
5. Now you will be taken to the first step searching for a new DID. Select from the search options provided. You can search by multiple ways at the same time or only by one option. If you are searching for multiple numbers, you can also check mark the "Sequential" box for numbers in sequential order. If there are no sequential numbers available, be sure to uncheck the box to search again. There are likely non-sequential numbers available. Enter your selection and click "Search":



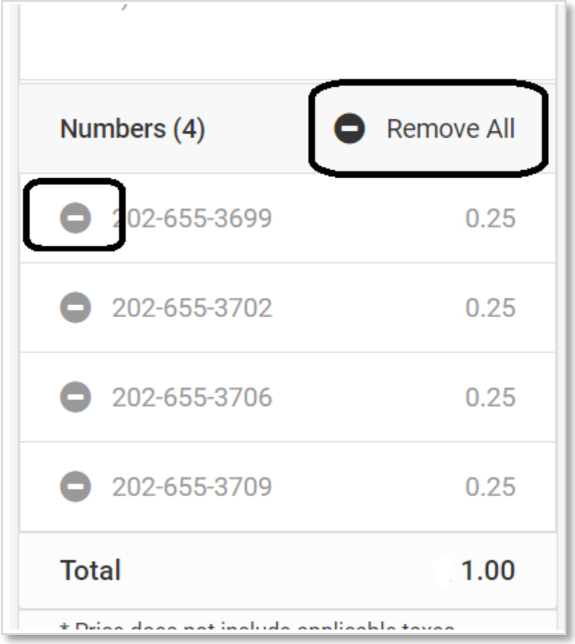
6. Once the results appear, you will see up to 12 results at one time. If you wish to see different lists of numbers, you can hit "Refresh" to update a new list of available DIDs. Click the plus sign button to add individual numbers to your cart or if you want to reserve multiple numbers, you can enter the number of DIDs you wish to reserve in the "Add Multiple Numbers" field. This will automatically add them to your cart. You may add up to 50. Enter the number you want and click "Add":



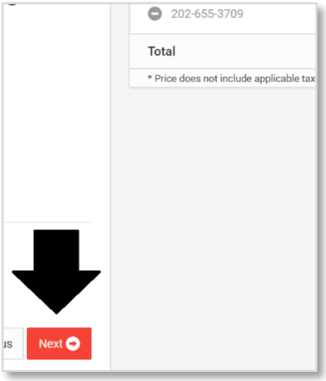
7. You can verify the TN(s) added to your cart to the right of your screen:



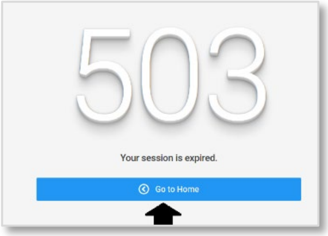
8. If you wish to remove any of the numbers after they have been added to your cart, you may select the delete button to remove the numbers individually, or select "Remove All" to remove all numbers from your cart to start over:



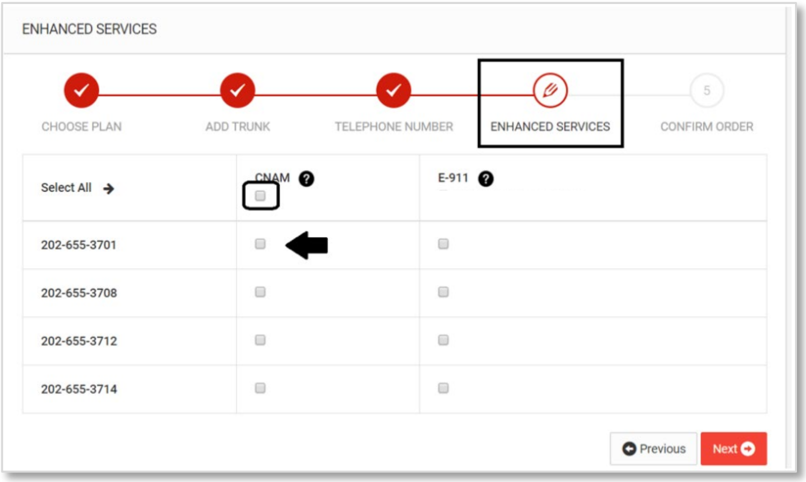
9. Once you have all your numbers in the cart and are ready to proceed, scroll down and select "Next":



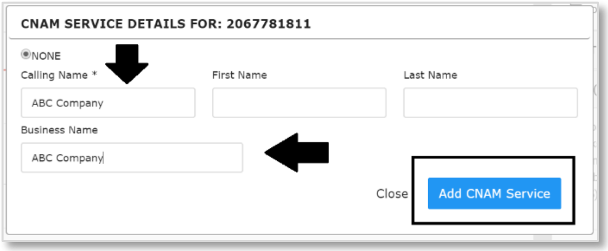
10. If you wait too long to search, you may see a 503 error. You will need to select the "Go to Home" button to return to the home page to start over:



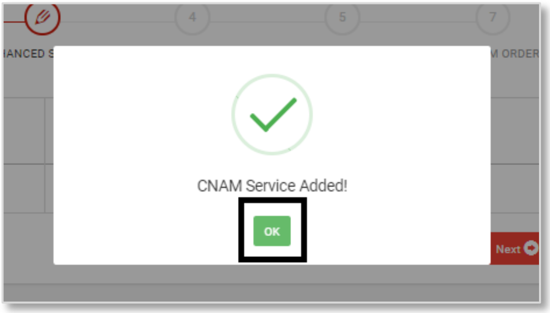
11. Next you have the option to select your Enhanced services (features). These are optional. To add CNAM (caller id name), select the radio button next to the DID under the CNAM column. If you wish to add the same name to all numbers, check the "Select All" radio button next to CNAM:



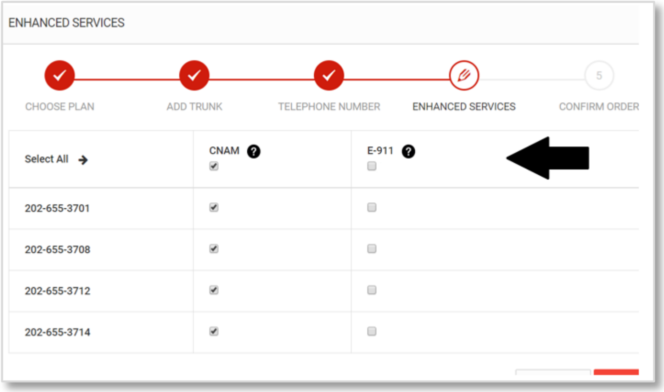
12. Once you click the CNAM button, you will receive a pop up to enter the CNAM information to be added to the LIDB database. Enter the end user name information you wish to be reflected and select "Add CNAM Service". This is the outbound name information displayed by phone number. *NOTE* Calling Name is limited to 15 alpha-numeric characters, including spaces:



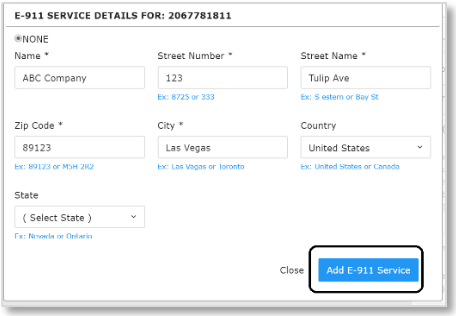
13. Once the record is added to the order, you should receive a pop up letting you know the CNAM was added, click "OK":



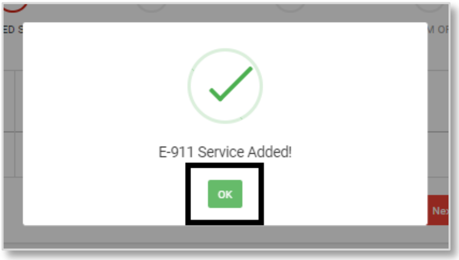
14. Next you can add an E911 record if you would like. If so, check the box under E911 just like CNAM. If you wish to add the same 911 address record to all numbers, check the "Select All" radio button next to E-911:



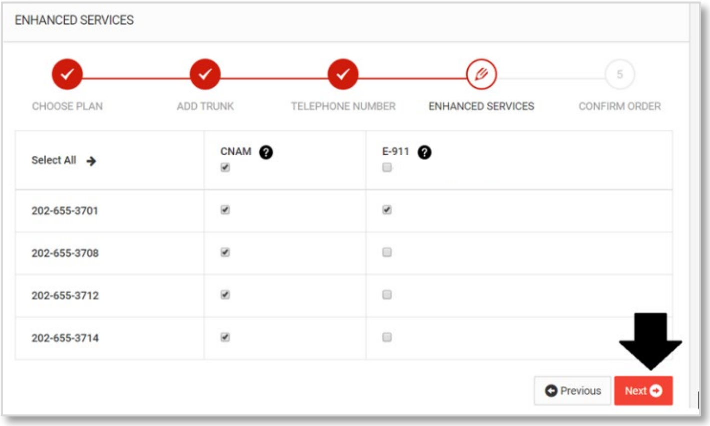
15. When you check the E911 box, you will receive another pop up to add the record information. Add the customer name, number and address to be associated then select "Add E-911 Service":



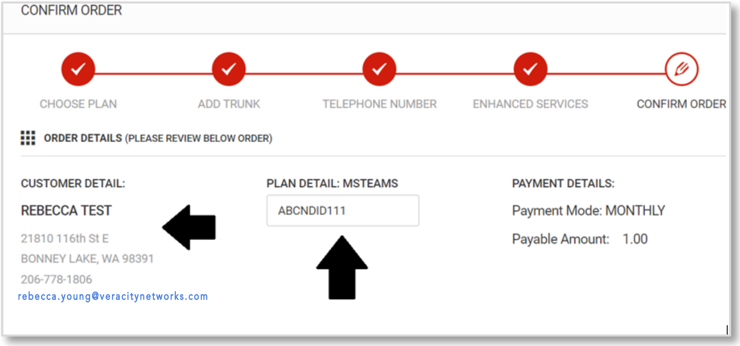
16. If your record is successfully added to the order, you will receive a pop up that it has been added. Click "OK". If the address does not validate with the postal system, you will need to adjust it until it validates or provides a valid correction:



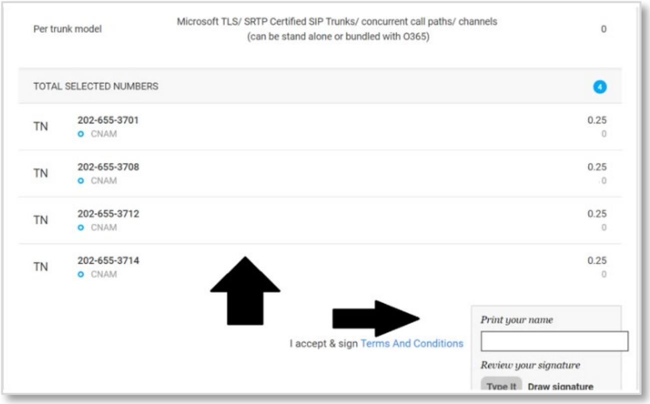
17. Once you are finished with any features you are adding, you may click "Next" at the bottom right corner to move on to the Provisioning tab. If you selected features, you will now see the boxes checked for the service:



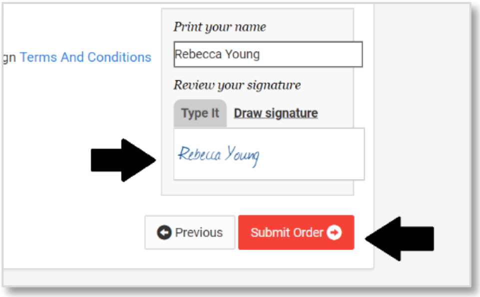
18. Now, confirm all the details of your order prior to submission. Enter a PON (purchase order number) for your personal tracking purposes. If you do not assign one, the order number assigned to you will become your PON. Next, confirm your customer account details to the left:



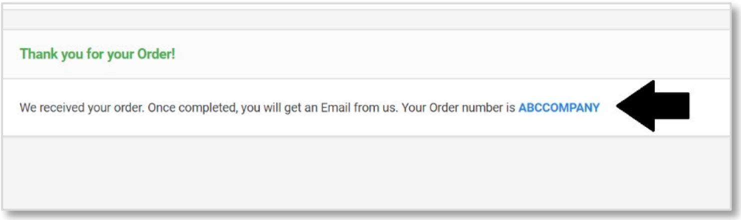
19. Now scroll down and verify your model details, phone numbers and features. You will then add your name into the "Print Name" field to accept the terms and conditions:



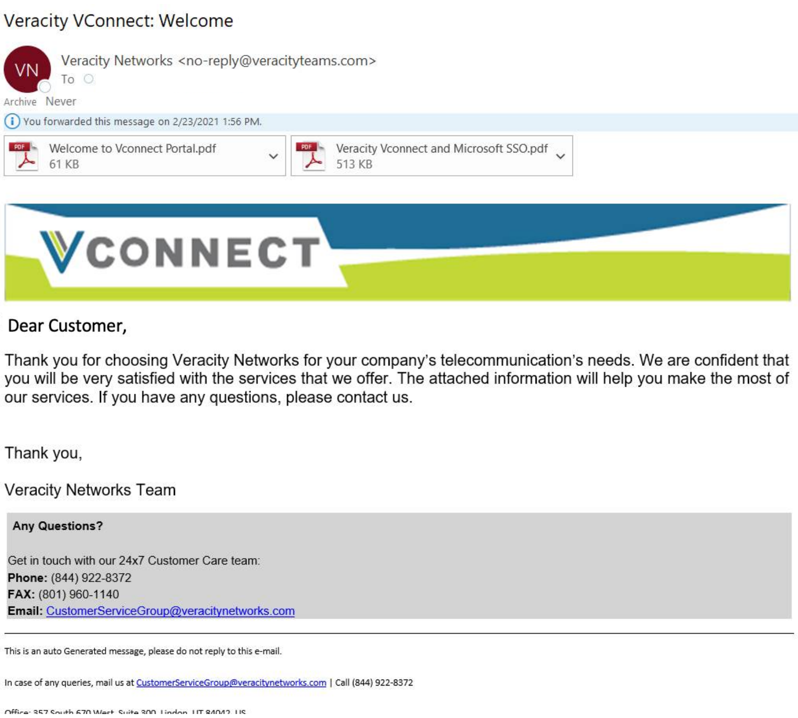
20. Once ready, click "Submit" to place your order:



21. You will receive a confirmation page acknowledging that your order has been submitted. If you wish to return to your order to view, you may click on the blue PON link:

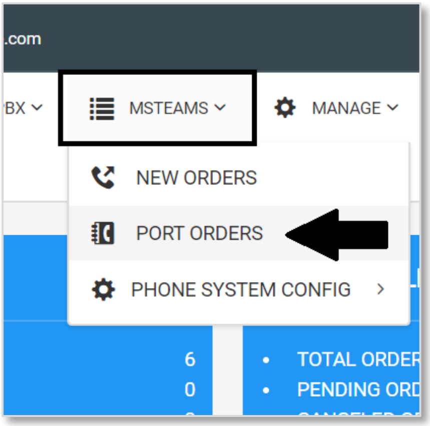


22. You should then receive a welcome email and an email confirmation from no reply (make sure you are set to receive emails from this and that they are not going into your junk folder) confirming your order. You should see your order details and order number:

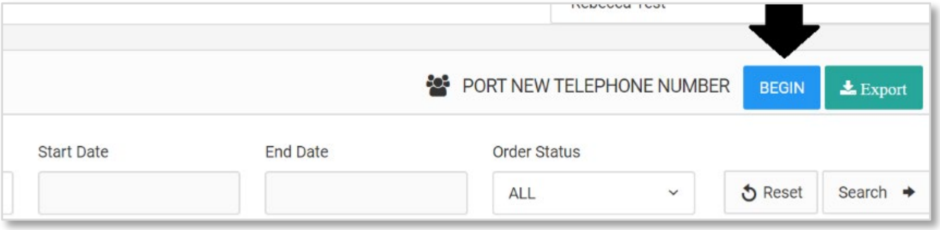


Adding New Veracity Service with Ported Numbers from Other Carriers

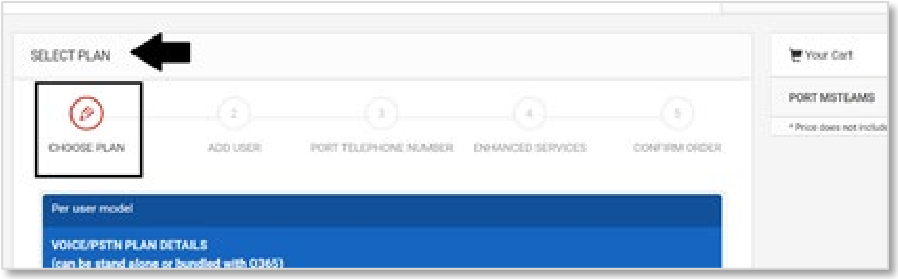
1. Once you are logged in, you will see the main dashboard. To start a Vconnect port request, click on "MSTEAMS" at the top of your Dashboard and then select "Port Orders":



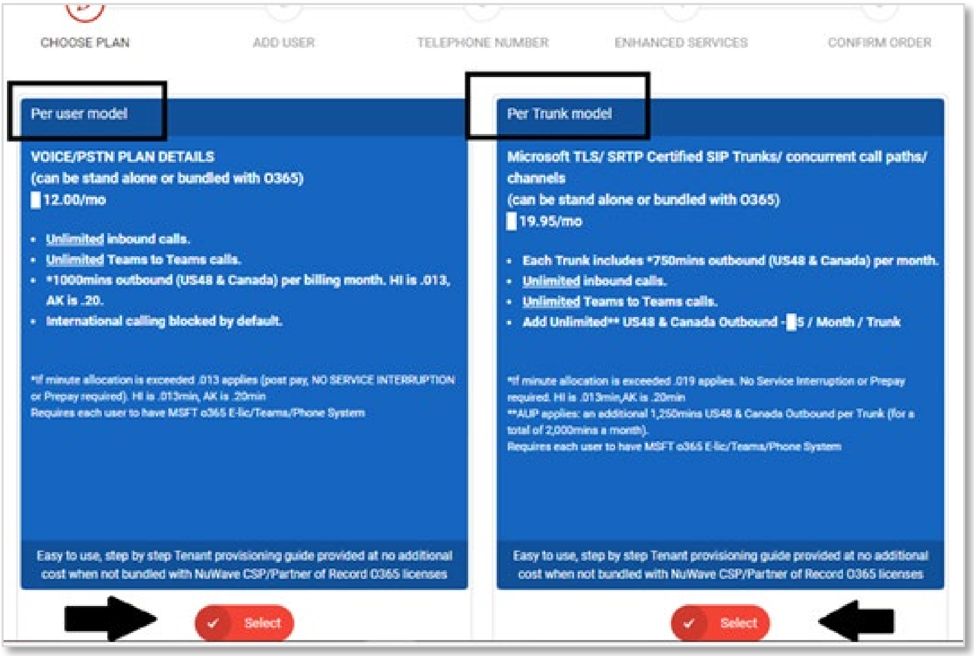
2. This will bring you to the ordering screen where you can start a new order. To start a new port order, select "Begin" in the upper right hand corner:



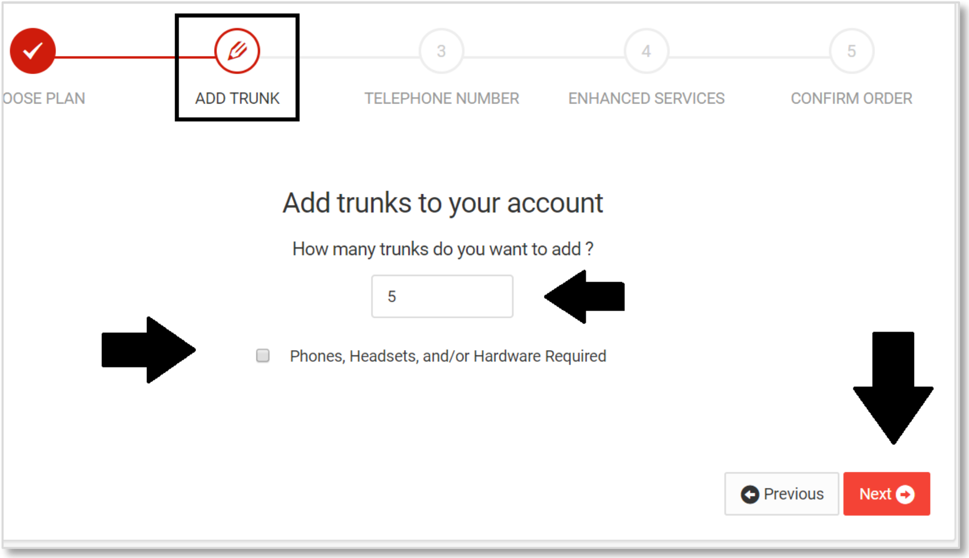
3. Now choose your Teams plan. You may choose between your "Per Customer" Plan or "Per Trunk" plan:



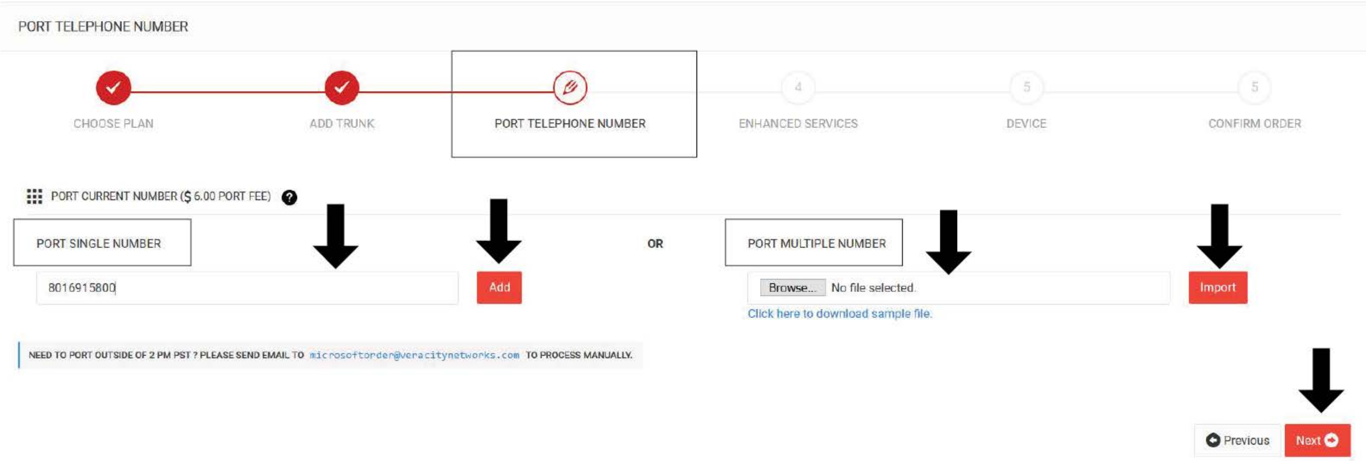
Select your plan. Click "Select" under the plan of your choosing:



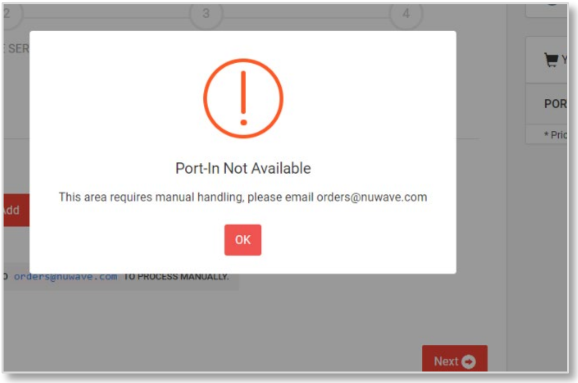
4. Now you will choose the number of trunks or users based on the model you selected. Here we have trunks. Enter the quantity you want to order. If you wish to order hardware or add unlimited calling plan, check the box that applies. Once finished, select "Next":



5. Now you will be taken to the first step of porting. You can either enter the number you are porting and click “Add” or if you are porting multiple numbers, import your spreadsheet. If you do not already have the spreadsheet, click the blue hyperlink that says “Click here to download sample file”. Fill out the form with the numbers and choose your file to import (you can import and port up to 300 numbers max in one order) and all TNs per order must have the same account number/BTN. Once you have added a TN or imported a file, you can select “Next”:

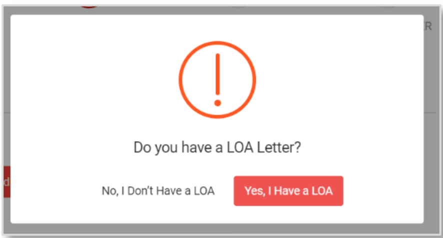


Note If your number(s) is not portable through the system for any reason, it will provide a pop up letting you know your number is not portable, and you will need to email CustomerServiceGroup@veracitynetworks.com to have the order reviewed and handled manually:

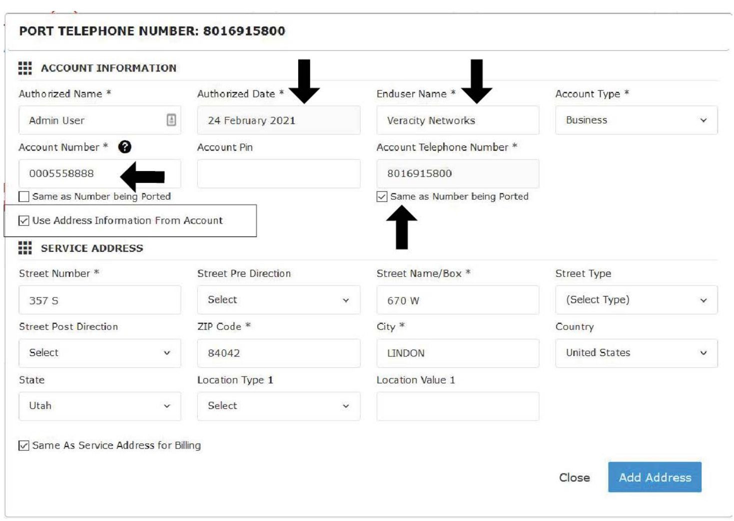


6. Once you have either added your individual number or imported your spreadsheet, you will get a pop up that will ask you if you have a LOA. You should always have a LOA for a porting number, so you would click on "Yes I have a LOA". If you do not, click "No, I don't Have a LOA":

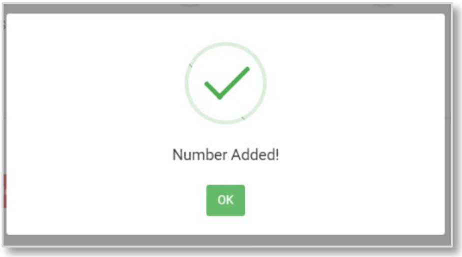
7. ***If you do not have a LOA, one will be created and filled out automatically and added to the order with your company information on your account profile. You will be prompted at the end of the order to digitally sign it. If you are not the signer, you must get a blank LOA and have the authorized contact sign it and upload it during step 5***



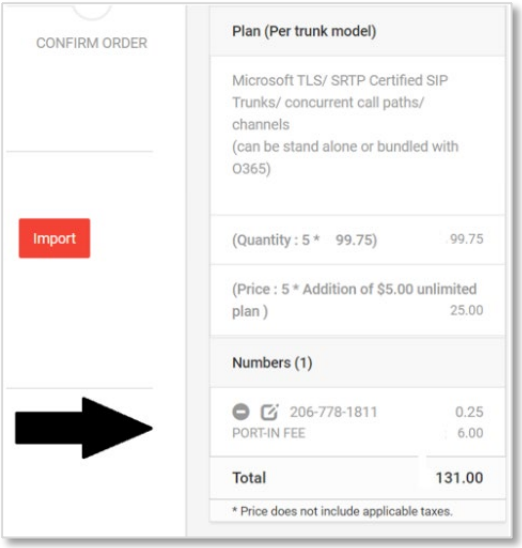
8. Once you have made your LOA selection, the account information page will pop up. Enter customer account information and current service address per the LOA that matches the account with the current carrier (or click the box "Use Address Information From Account" if you are porting with your internal company account information). Account Number and Account Telephone Number are both required and must match the account. Some accounts may have PIN numbers (Microsoft customers will require their PIN). Once entered, select "Add Address":



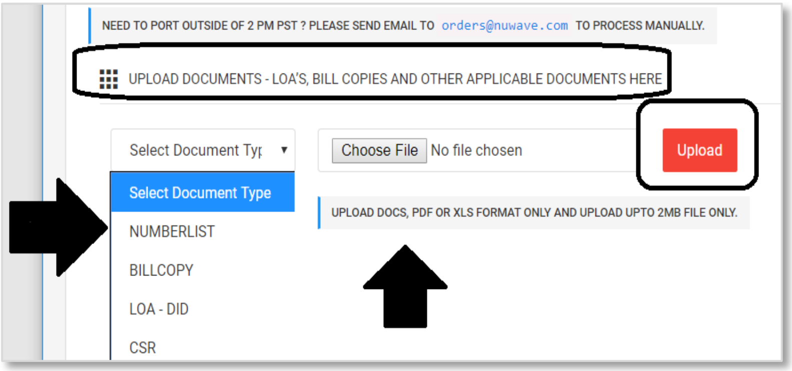
9. You should then see a pop up that says the number has been added:



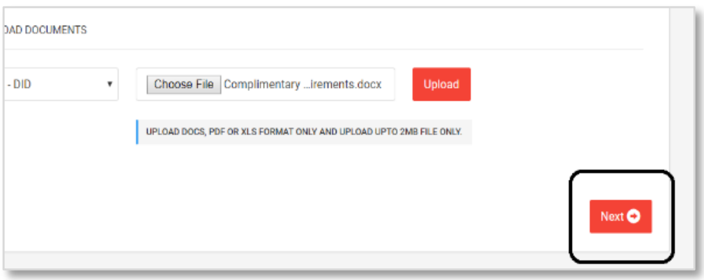
10. You can verify the TN(s) that has been added to your cart to the right of your screen:



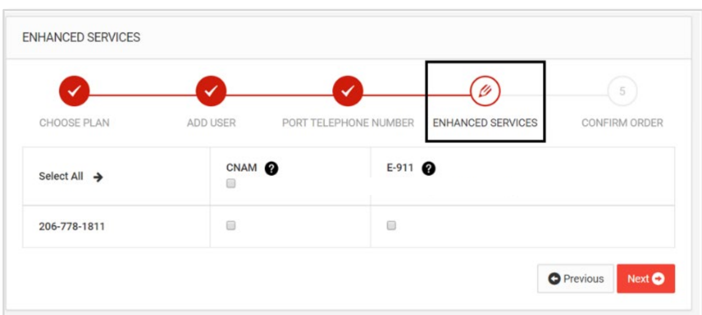
11. If you have a LOA or bill copy, now you will be able to upload it. Choose your document type from the drop down document type and then choose your file and click "Upload". You will need to upload each file separately:



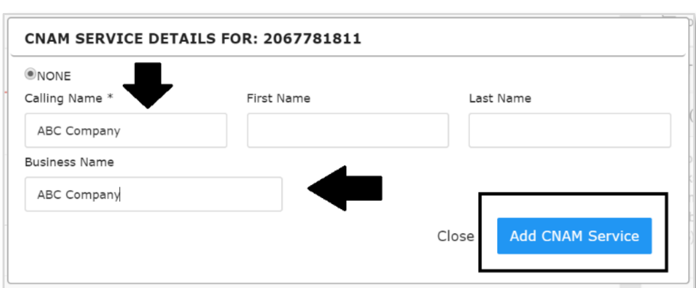
12. You may upload as many documents as you need. Once your documents have uploaded, click "Next" in the bottom right corner to move forward:



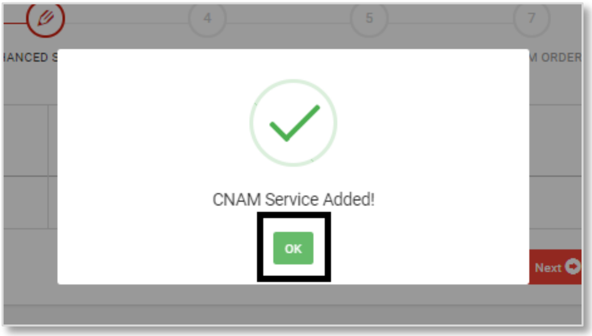
13. Next you have the option to select your Enhanced services (features). These are optional. To add CNAM (caller id name), select the radio button next to the DID under the CNAM column. If you wish to add the same name to all numbers, check the "Select All" radio button next to CNAM:



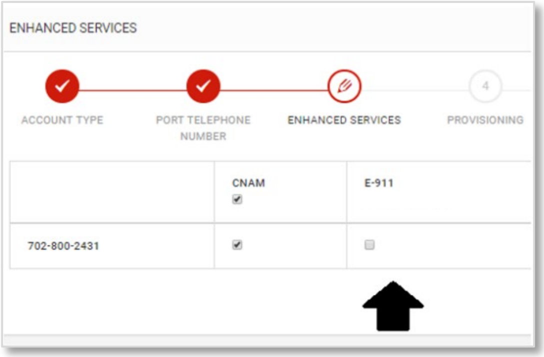
14. Once you click the CNAM button, you will receive a pop up to enter the CNAM information to be added to the LIDB database. Enter the end user name information you wish to be reflected and select "Add CNAM Service". This is the outbound name information displayed by phone number. *NOTE* Calling Name is limited to 15 alpha-numeric characters, including spaces:



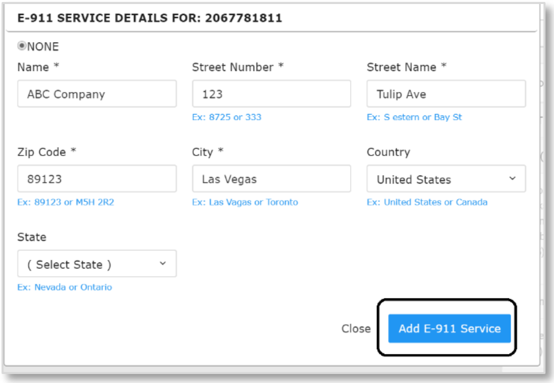
15. Once the record is added to the order, you should receive a pop up letting you know the CNAM was added, click "OK":



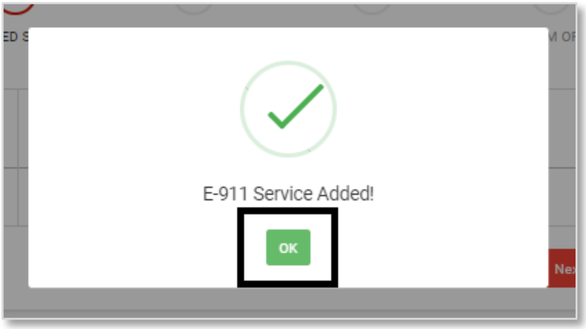
16. Next you can add an E911 record if you would like. If so, check the box under E911 just like CNAM. If you wish to add the same 911 address record to all numbers, check the "Select All" radio button next to E-911:



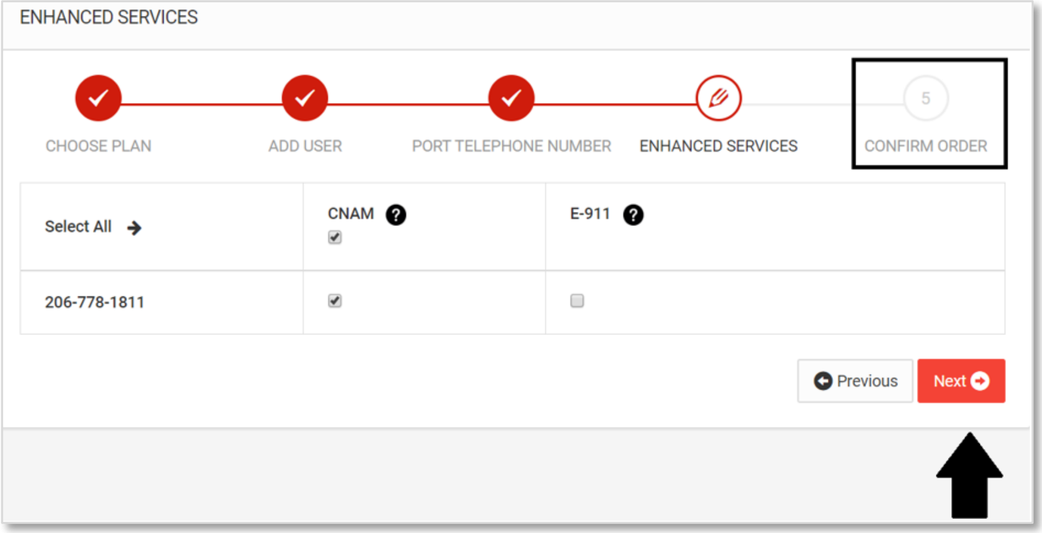
17. When you check the E911 box, you will receive another pop up to add the record information. Add the customer name, number and address to be associated then select "Add E-911 Service":



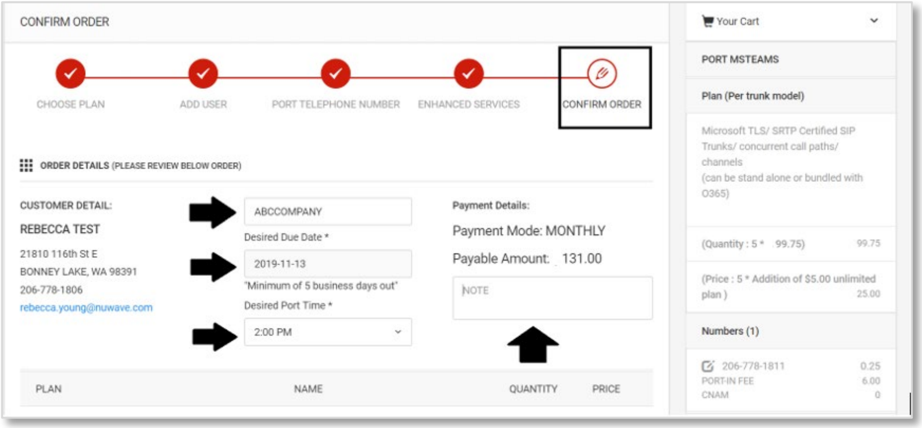
18. If your record is successfully added to the order, you will receive a pop up that it has been added. Click "OK". If the address does not validate with the postal system, you will need to adjust it until it validates or provides a valid correction. You will want to make sure you have the thoroughfares correct such as Dr instead of Drive or St instead of Street, as well as pre or post directional and zip codes:



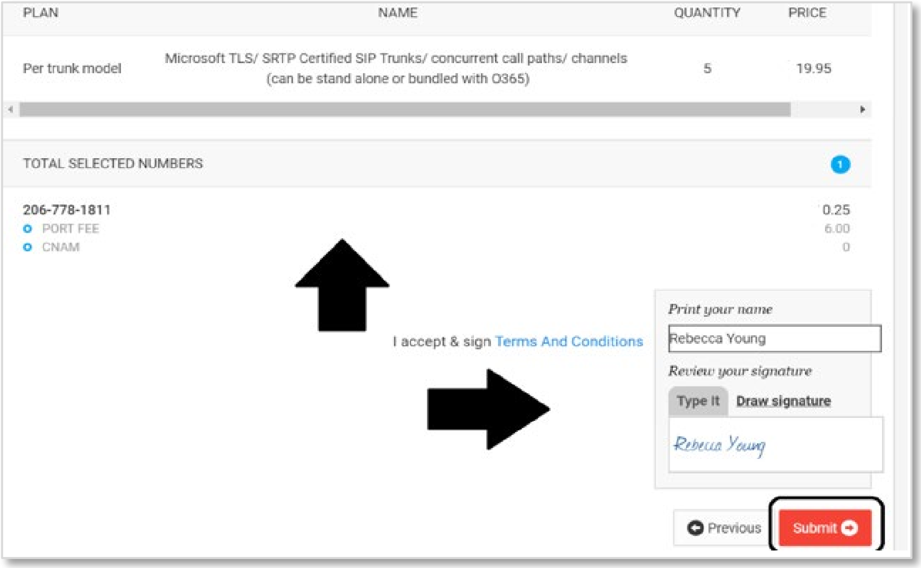
19. Once you are finished with any features you are adding, you may click "Next" at the bottom right corner to move on to the Provisioning tab. If you selected features, you will now see the boxes checked for the service:



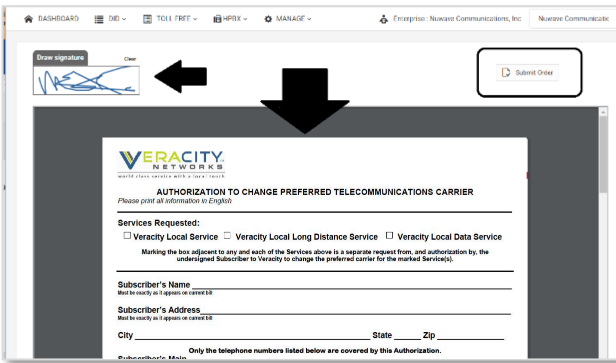
20. Now, confirm all the details of your order prior to submission. Enter a PON (purchase order number) for your personal tracking purposes. If you do not assign one, the order number assigned to you will become your PON. Next, enter your desired port date. The date requested cannot be sooner than 5 business days. Most carriers issue FOC for 5-7 business days from port submission. Now enter the trigger time of your port. This is the time the carrier will trigger the port and release your numbers to us to activate. It will by default, set to 2pm Pacific time. Please note LNP support is only available 7am-5pm Pacific. You may also choose to add any additional notes in the notes section:



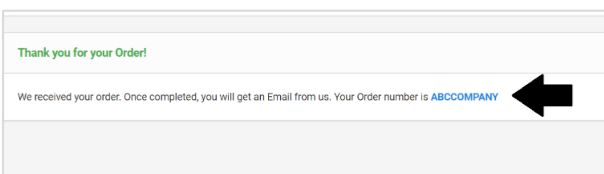
21. Now scroll down and verify your model details, phone numbers and features. You will then add your name into the "Print Name" field to accept the terms and conditions. Once you are ready, click "Next":



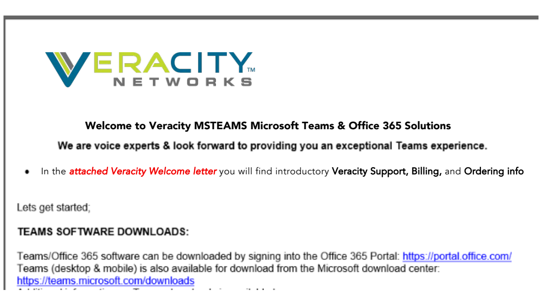
If you have uploaded your LOA at the beginning of your order, skip to step 10. If you have to sign the digital LOA, follow this step before moving on. Here you will sign your digital LOA copy. Please review to make sure the information is correct, digitally sign the LOA in the upper left hand corner and click "Submit Order" on the upper right hand corner once you are ready to submit the document with your order:



22. You will receive a confirmation page acknowledging that your order has been submitted. If you wish to return to your order to view, you may click on the blue PON link:



23. You should then receive a welcome email and an email confirmation from no reply (make sure you are set to receive emails from this and that they are not going into your junk folder) confirming your order. You should see your order details and order number:



24. Next you will receive an update that the order is "Pending". This means it has been submitted and is pending a carrier/system response. It should show order notes and all of your order information as well as the number(s) being requested to port:


No-Reply
[Veracity Networks]: Update summary of Order #NW2018040010

VERACITY NETWORKS

Update Summary

Order Note
Pending For 7023578192.

Order Summary

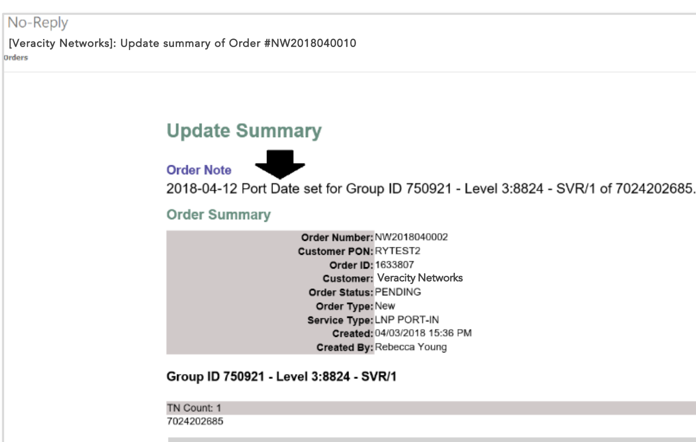
Order Number:	NW2018040010
Customer PON:	NW2018040010
Order ID:	1639667
Customer:	Veracity Networks
Order Status:	PENDING
Order Type:	New
Service Type:	LNP PORT-IN
Created:	04/17/2018 16:57 PM
Created By:	Rebecca Young

TN Count: 1
7023578192

Any Questions?

Get in touch with our 24x7 Customer Care team:
Phone: (888) 368-9283

25. Once you have a response, you will either receive an email that the port has a port date set, or that it is rejected. Below is an example of one that has received a FOC port date. In the note the port date is noted per the group of numbers requested for 4/12/18. For port completion see step 16 .**See step 14 for rejected orders and Step 15 for edits or cancels:


No-Reply
[Veracity Networks]: Update summary of Order #NW2018040010

Update Summary

Order Note
2018-04-12 Port Date set for Group ID 750921 - Level 3:8824 - SVR/1 of 7024202685.

Order Summary

Order Number:	NW2018040002
Customer PON:	RYTEST2
Order ID:	1633807
Customer:	Veracity Networks
Order Status:	PENDING
Order Type:	New
Service Type:	LNP PORT-IN
Created:	04/03/2018 15:36 PM
Created By:	Rebecca Young

Group ID 750921 - Level 3:8824 - SVR/1

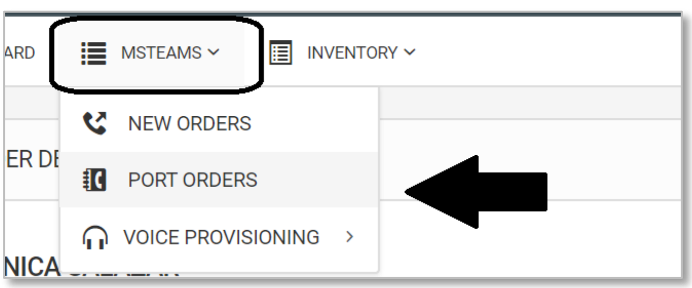
TN Count: 1
7024202685

Any Questions?

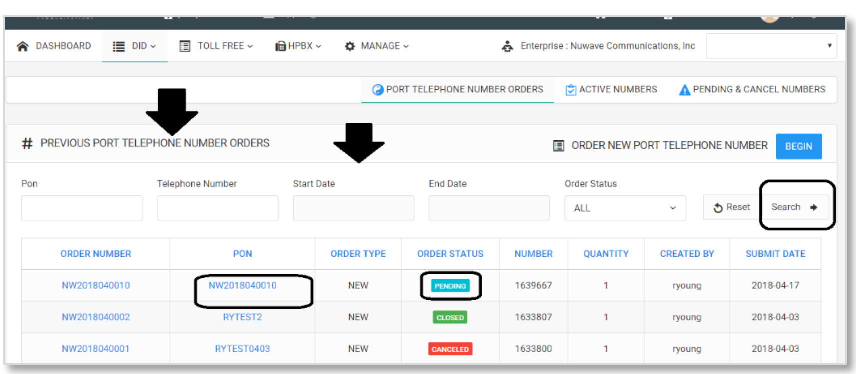
26. If your order is rejected, you should receive the same email but, in the notes it will have a reason for reject. The items you may edit on your order to resubmit are the following:

- Address
- Authorization Name
- Business Name
- Residential or Business Service Type
- You may remove any TNs from the order (you cannot add TNs to an order)
- Desired Due Date
- Port Time
- PON
- Add additional documents or notes

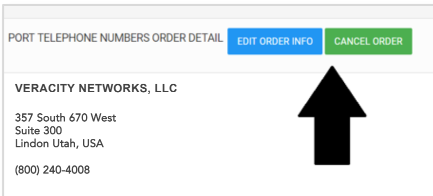
27. You may view, edit or cancel your order by first locating your order by going to your dashboard and clicking back on MSTEAMS and then "Port Orders":



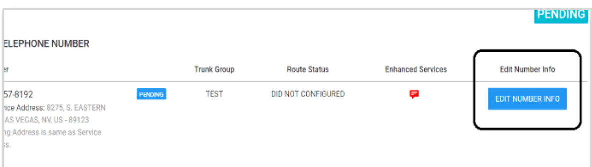
You can search for your order by specific information, or you can search from the list of all orders below. Find your pending order and click on either the PON or Order Number link to get to your order:



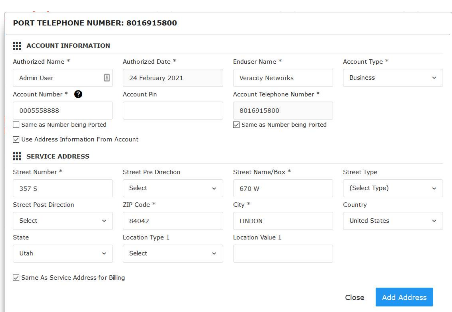
Once you are in your order, you may either edit or cancel the order but selecting one of the two click options at the top of the page. You may also view the information and status of your order. This option allows you to edit either the PON or desired due date for port:



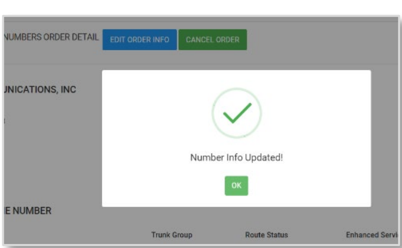
If you wish to edit any other order information allowed, go down to the bottom right corner of the page, and select "Edit Number Info":



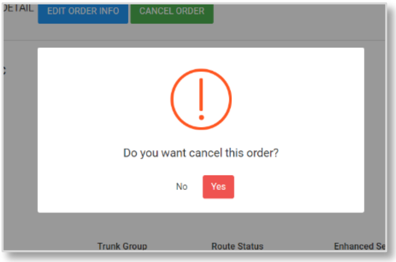
Once the order detail page pops up, edit the information you need to edit and then select "Update" in the bottom right hand corner:



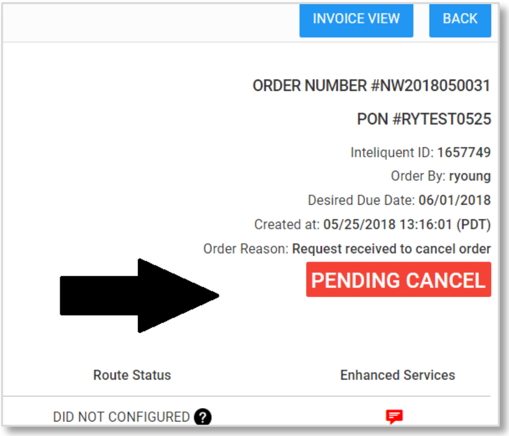
Once you click update you will receive a pop up that will notify you that the information was updated:



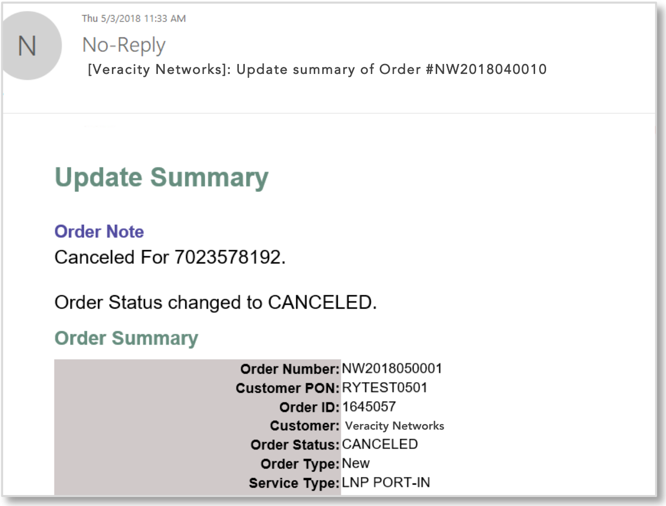
If you are canceling your order, select the "Cancel Order" button. You will be prompted with a pop up requesting you to confirm that you want to cancel the order. If you still do, select the "Yes" button:



Your order will then show "Pending Cancel" until the cancel is complete:



Once your order is completely canceled, you will receive an updated email advising you that it is completed:


Thu 5/3/2018 11:33 AM

N

No-Reply

[Veracity Networks]: Update summary of Order #NW2018040010

Update Summary

Order Note

Canceled For 7023578192.

Order Status changed to CANCELED.

Order Summary

Order Number:	NW2018050001
Customer PON:	RYTEST0501
Order ID:	1645057
Customer:	Veracity Networks
Order Status:	CANCELED
Order Type:	New
Service Type:	LNP PORT-IN

28. On the day of your port, the number will trigger at the time selected (Pacific Time). Once the trigger is complete, you will receive an email letting you know your order is closed/complete. You may now make test calls. If there are any issues, please report them to CustomerServiceGroup@veracitynetworks.com

rders

VERACITY NETWORKS

Update Summary

Order Note
6262825509 Status changed to Complete.

Order Status changed to CLOSED.

Order Summary

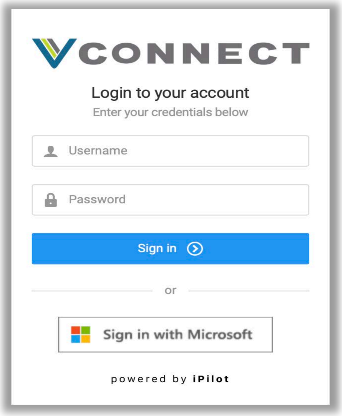
Order Number:	NW2018050009
Customer PON:	AA050801LNP
Order ID:	1649444
Customer:	
Order Status:	CLOSED
Order Type:	New
Service Type:	LNP PORT-IN
Desired Due Date:	05/17/2018
Created:	05/09/2018 04:13 AM
Created By:	Angela Allen

TN Count: 1

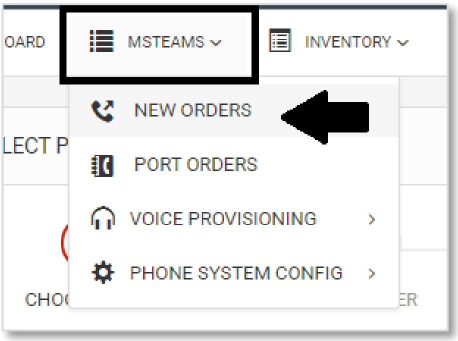
29. Once services are complete, a billing notice will be sent to our billing department and services will be added to your account appropriately.

Adding New Numbers without Trunks or Users

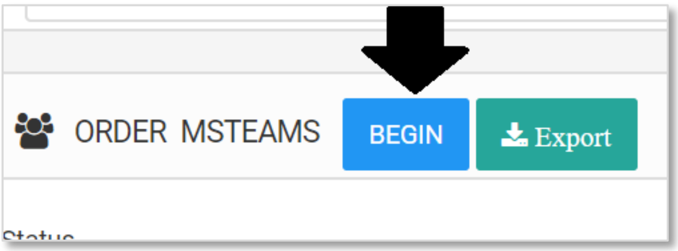
1. Log into the Vconnect Portal using your user log in: https://vconnect.veracityteams.com/index.php/site/login



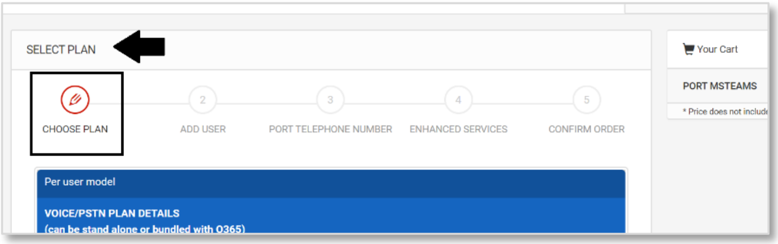
2. Once you are logged in, you will see the main dashboard. To start a Veracity new DID request, click on "MSTEAMS" at the top of your Dashboard and then select "New Orders":



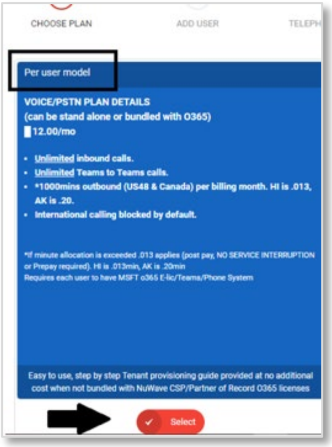
This will bring you to the ordering screen where you can view previous orders and start a new order. To start a new DID order, select "Begin" in the upper right hand corner:



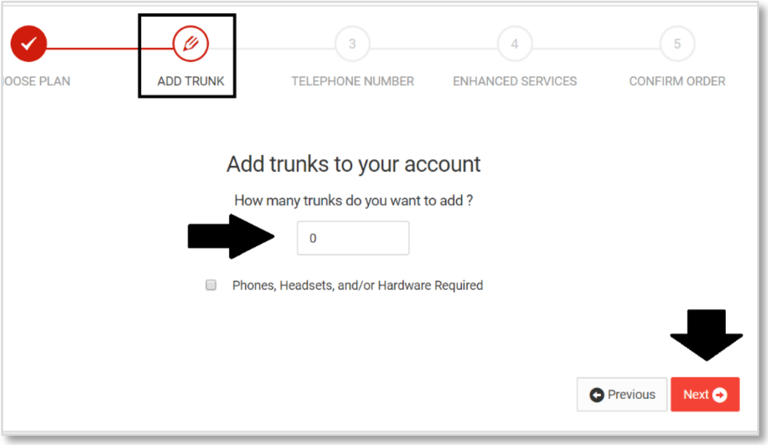
3. Since you have already set up your initial Veracity service, you will only have your current plan to choose from:



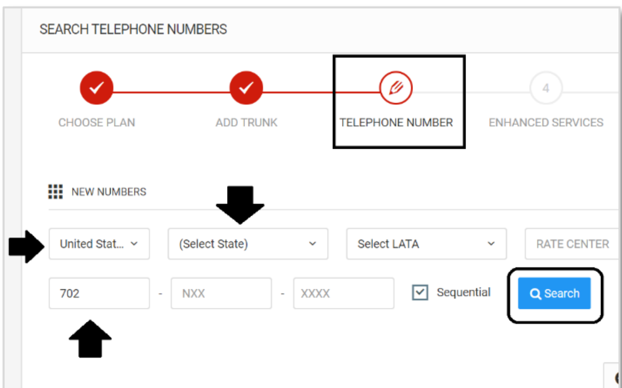
Select your plan. Click "Select" under your current available plan:



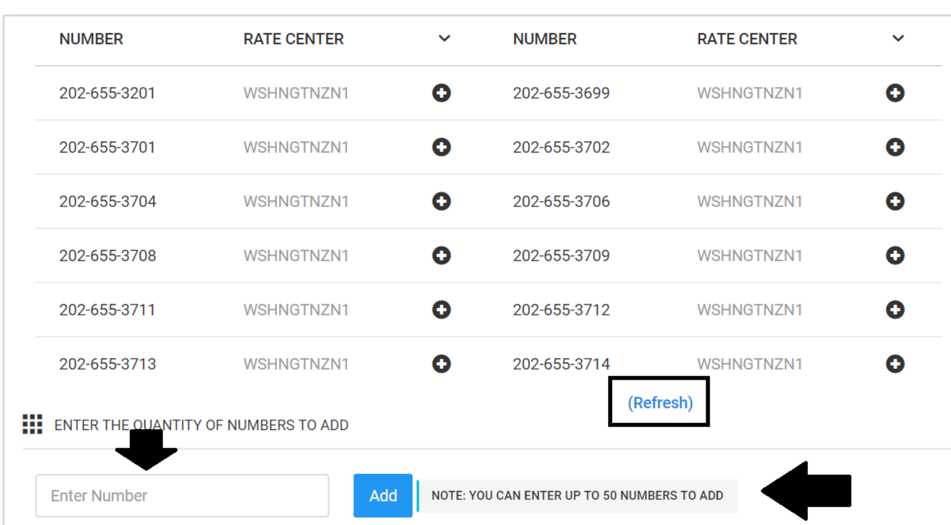
Now the system will request that you enter the number of trunks or users you wish to add. Since you are only here to order DID numbers for your existing Veracity service, either leave the field blank or enter "0". Once finished, select "Next":



4. Now you will be taken to the first step searching for a new DID. Select from the search options provided. You can search by multiple ways at the same time or only by one option. If you are searching for multiple numbers, you can also check mark the "Sequential" box for numbers in sequential order. If there are no sequential numbers available, be sure to uncheck the box to search again. There are likely non-sequential numbers available. Enter your selection and click "Search":

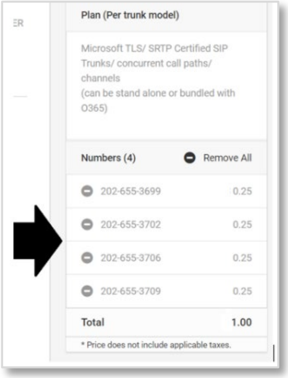


Once the results appear, you will see up to 12 results at one time. If you wish to see different lists of numbers, you can hit "Refresh" to update a new list of available DIDs. Click the plus sign button to add individual numbers to your cart or if you want to reserve multiple numbers, you can enter the number of DIDs you wish to reserve in the "Add Multiple Numbers" field. This will automatically add them to your cart. You may add up to 50. Enter the number you want and click "Add":

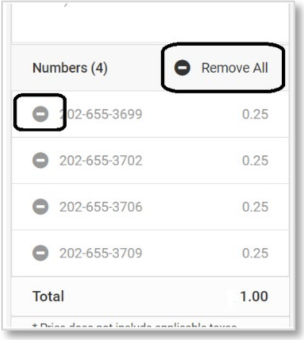


NUMBER	RATE CENTER		NUMBER	RATE CENTER	
202-655-3201	WSHNGTNZN1		202-655-3699	WSHNGTNZN1	
202-655-3701	WSHNGTNZN1		202-655-3702	WSHNGTNZN1	
202-655-3704	WSHNGTNZN1		202-655-3706	WSHNGTNZN1	
202-655-3708	WSHNGTNZN1		202-655-3709	WSHNGTNZN1	
202-655-3711	WSHNGTNZN1		202-655-3712	WSHNGTNZN1	
202-655-3713	WSHNGTNZN1		202-655-3714	WSHNGTNZN1	

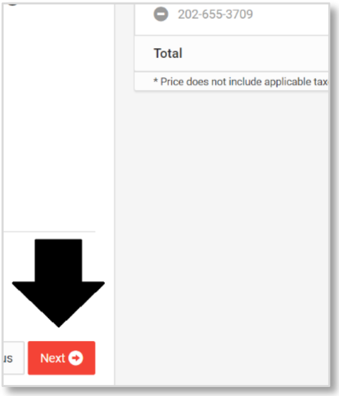
You can verify the TN(s) added to your cart to the right of your screen:



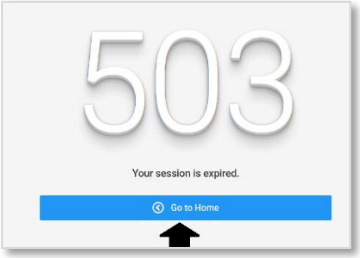
If you wish to remove any of the numbers after they have been added to your cart, you may select the delete button to remove the numbers individually, or select "Remove All" to remove all numbers from your cart to start over:



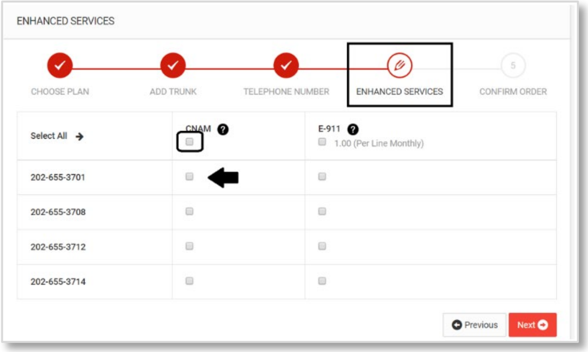
Once you have all your numbers in the cart and are ready to proceed, scroll down and select "Next":



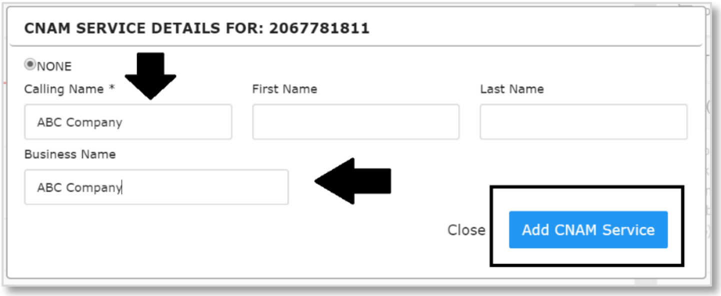
5. If you wait too long to search, you may see a 503 error. You will need to select the "Go to Home" button to return to the home page to start over:



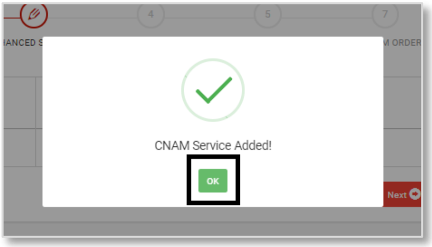
6. Next you have the option to select your Enhanced services (features). These are optional. To add CNAM (caller id name), select the radio button next to the DID under the CNAM column. If you wish to add the same name to all numbers, check the "Select All" radio button next to CNAM:



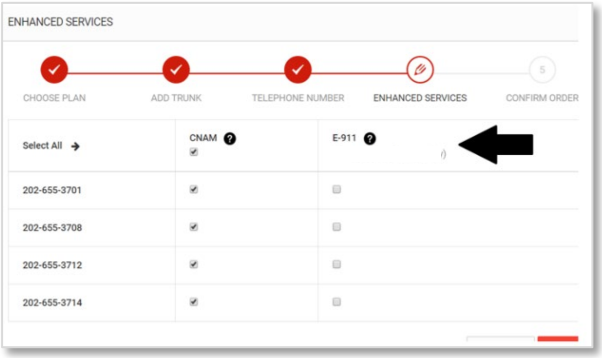
Once you click the CNAM button, you will receive a pop up to enter the CNAM information to be added to the LIDB database. Enter the end user name information you wish to be reflected and select "Add CNAM Service". This is the outbound name information displayed by phone number. *NOTE* Calling Name is limited to 15 alpha-numeric characters, including spaces:



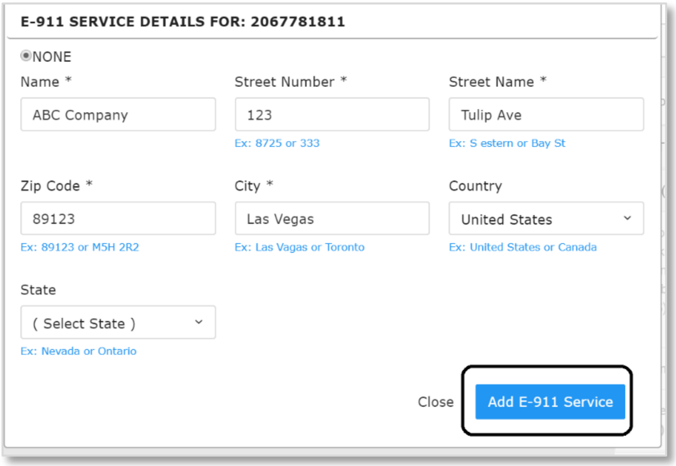
Once the record is added to the order, you should receive a pop up letting you know the CNAM was added, click "OK":



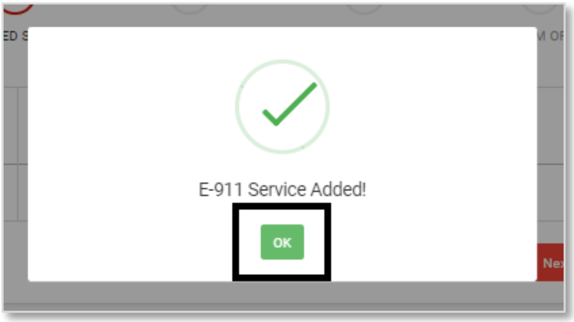
Next you can add an E911 record if you would like. If so, check the box under E911 just like CNAM. If you wish to add the same 911 address record to all numbers, check the "Select All" radio button next to E-911:



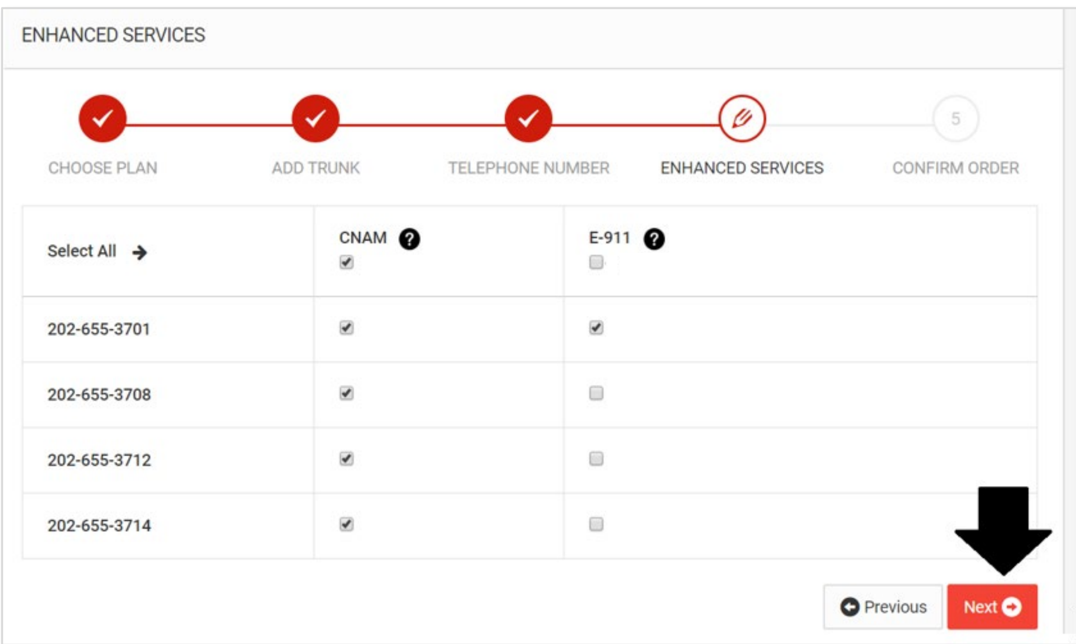
When you check the E911 box, you will receive another pop up to add the record information. Add the customer name, number and address to be associated then select "Add E-911 Service":



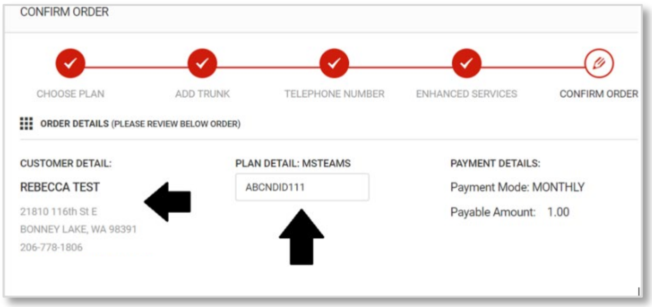
If your record is successfully added to the order, you will receive a pop up that it has been added. Click “OK”. If the address does not validate with the postal system, you will need to adjust it until it validates or provides a valid correction:



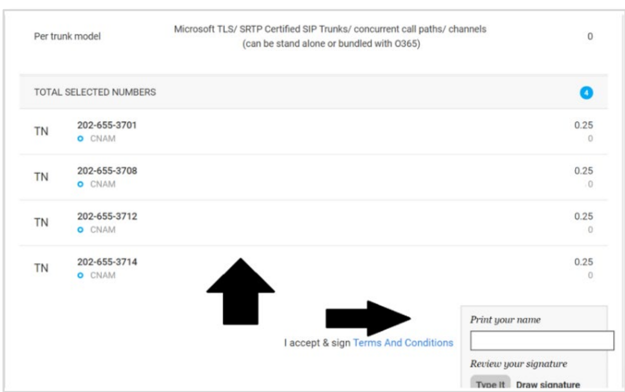
Once you are finished with any features you are adding, you may click “Next” at the bottom right corner to move on to the Provisioning tab. If you selected features, you will now see the boxes checked for the service:



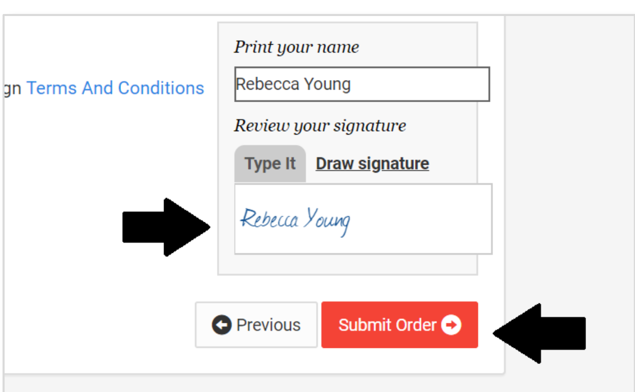
7. Now, confirm all the details of your order prior to submission. Enter a PON (purchase order number) for your personal tracking purposes. If you do not assign one, the order number assigned to you will become your PON. Next, confirm your customer account details to the left:



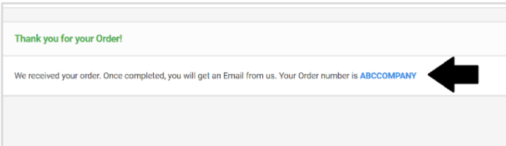
Now scroll down and verify your phone numbers and features. You will then add your name into the "Print Name" field to accept the terms and conditions:



Once ready, click "Submit" to place your order:

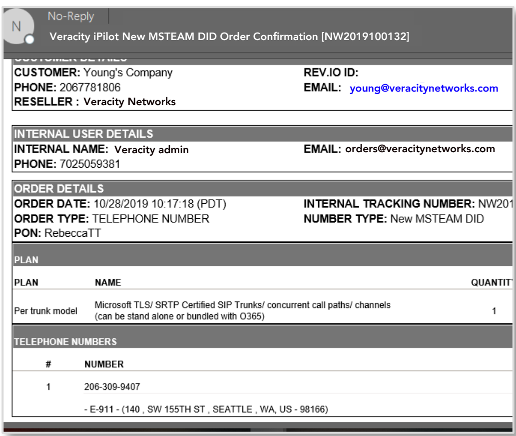


8. You will receive a confirmation page acknowledging that your order has been submitted. If you wish to return to your order to view, you may click on the blue PON link:


Thank you for your Order!

We received your order. Once completed, you will get an Email from us. Your Order number is ABCCOMPANY

9. You should then receive an email confirmation from no reply (make sure you are set to receive emails from this and that they are not going into your junk folder) confirming your order. You should see your order details and order number:


No-Reply

Veracity iPilot New MSTEAM DID Order Confirmation [NW2019100132]

CUSTOMER: Young's Company
PHONE: 2067781806
RESELLER : Veracity Networks
REV.IO ID:
EMAIL: young@veracitynetworks.com

INTERNAL USER DETAILS
INTERNAL NAME: Veracity admin
PHONE: 7025059381
EMAIL: orders@veracitynetworks.com

ORDER DETAILS
ORDER DATE: 10/28/2019 10:17:18 (PDT)
ORDER TYPE: TELEPHONE NUMBER
PON: RebeccaTT
INTERNAL TRACKING NUMBER: NW201
NUMBER TYPE: New MSTEAM DID

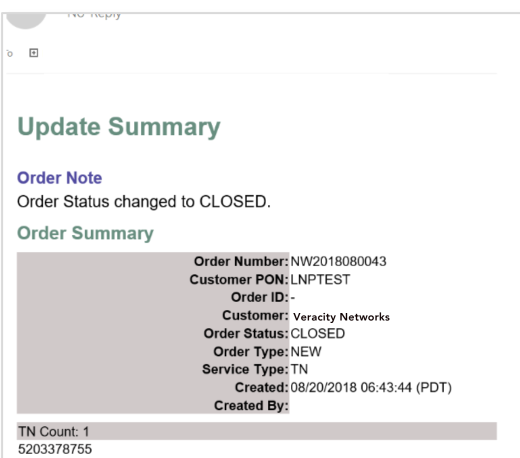
PLAN

PLAN	NAME	QUANTIT
Per trunk model	Microsoft TLS/ SRTP Certified SIP Trunks/ concurrent call paths/ channels (can be stand alone or bundled with O365)	1

TELEPHONE NUMBERS

#	NUMBER
1	206-309-9407
	- E-911 - (140 , SW 155TH ST , SEATTLE , WA, US - 98166)

10. Once your numbers are complete and ready for use, you will receive a completion email notification:


Update Summary

Order Note

Order Status changed to CLOSED.

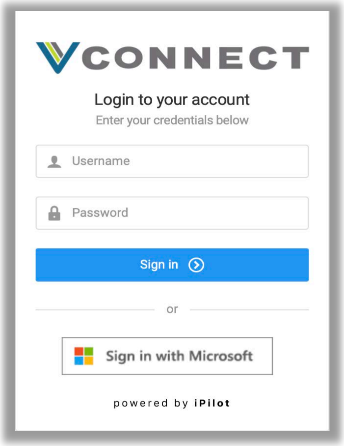
Order Summary

Order Number:	NW2018080043
Customer PON:	LNPTEST
Order ID:	-
Customer:	Veracity Networks
Order Status:	CLOSED
Order Type:	NEW
Service Type:	TN
Created:	08/20/2018 06:43:44 (PDT)
Created By:	

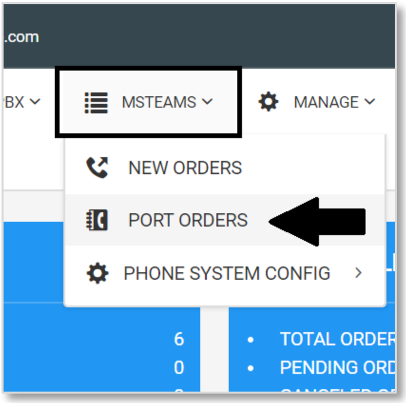
TN Count: 1
5203378755

Porting Existing Numbers without Trunks or Users

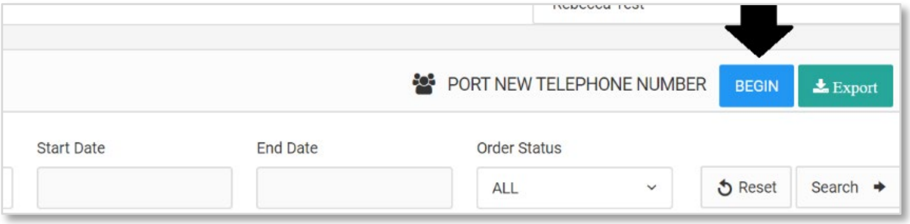
1. Log into the iPilot Portal using your user log in: https://vconnect.veracityteams.com/index.php/site/login



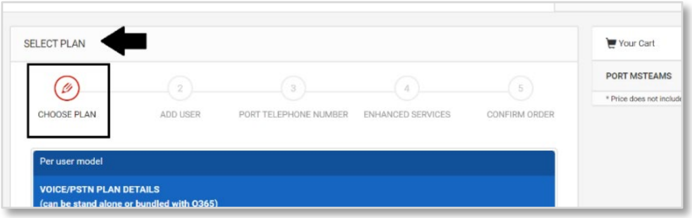
2. Once you are logged in, you will see the main dashboard. To start a Veracity port request, click on "MSTEAMS" at the top of your Dashboard and then select "Port Orders":



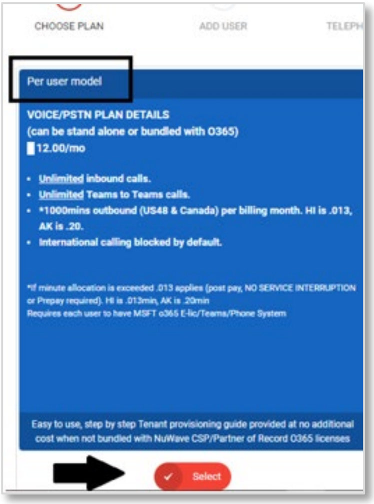
This will bring you to the ordering screen where you can start a new order. To start a new port order, select "Begin" in the upper right hand corner:



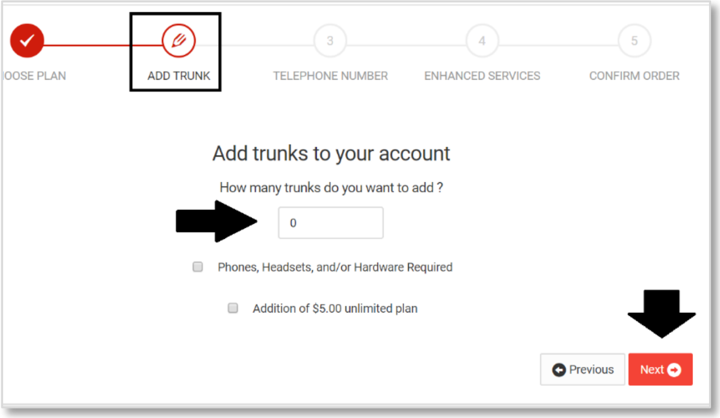
Since you have already set up your initial Veracity service, you will only have your current plan to choose from:



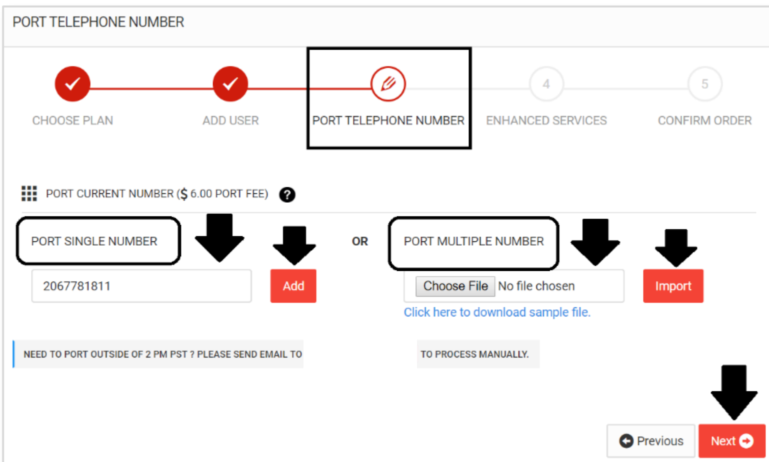
Select your plan. Click "Select" under your current available plan:



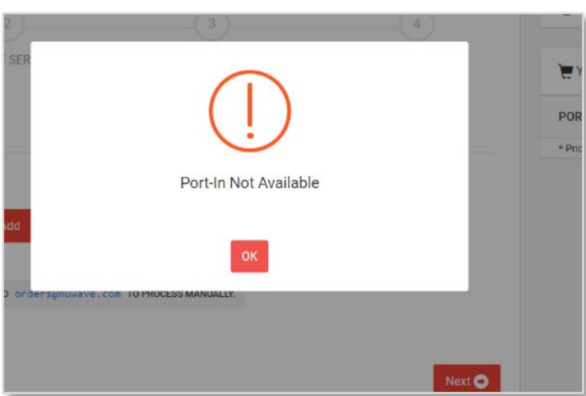
Now the system will request that you enter the number of trunks or users you wish to add. Since you are only here to order DID numbers for your existing Veracity service, either leave the field blank or enter "0". Once finished, select "Next":



3. Now you will be taken to the first step of porting. You can either enter the number you are porting and click "Add" or if you are porting multiple numbers, import your spreadsheet. If you do not already have the spreadsheet, click the blue hyperlink that says "Click here to download sample file". Fill out the form with the numbers and choose your file to import (you can import and port up to 300 numbers max in one order) and all TNs per order must have the same account number/BTN. Once you have added a TN or imported a file, you can select "Next":

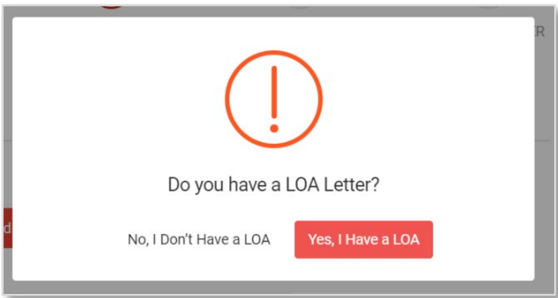


Note If your number(s) is not portable through the system for any reason, it will provide a pop up letting you know your number is not portable, and you will need to email CustomerServiceGroup@veracitynetworks.com to have the order reviewed and handled manually:

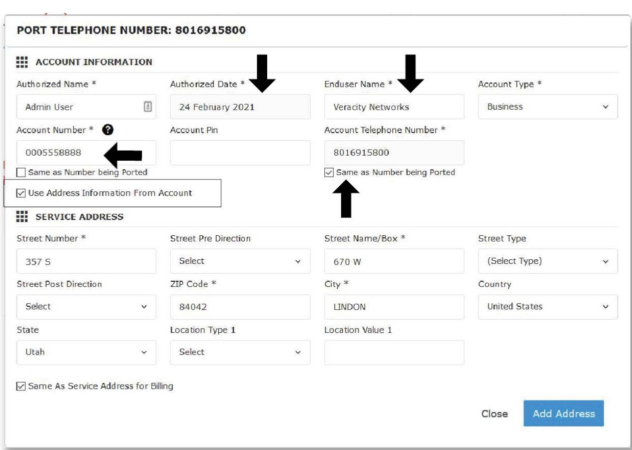


Once you have either added your individual number or imported your spreadsheet, you will get a pop up that will ask you if you have a LOA. You should always have a LOA for a porting number, so you would click on "Yes I have a LOA". If you do not, click "No, I don't Have a LOA":

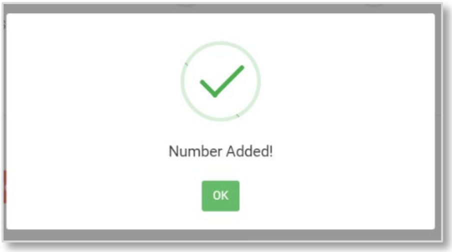
If you do not have a LOA, one will be created and filled out automatically and added to the order with your company information on your account profile. You will be prompted at the end of the order to digitally sign it. If you are not the signer, you must get a blank LOA and have the authorized contact sign it and upload it during step 5



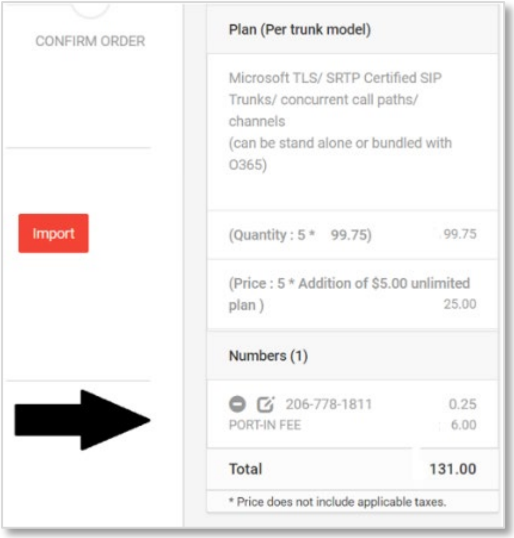
4. Once you have made your LOA selection, the account information page will pop up. Enter customer account information and current service address per the LOA that matches the account with the current carrier (or click the box "Use Address Information From Account" if you are porting with your internal company account information). Account Number and Account Telephone Number are both required and must match the account. Some accounts may have PIN numbers (Microsoft customers will require their PIN). Once entered, select "Add Address":



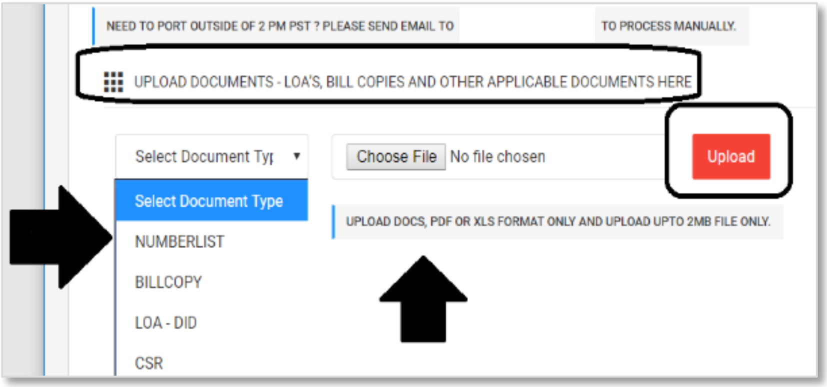
You should then see a pop up that says the number has been added:



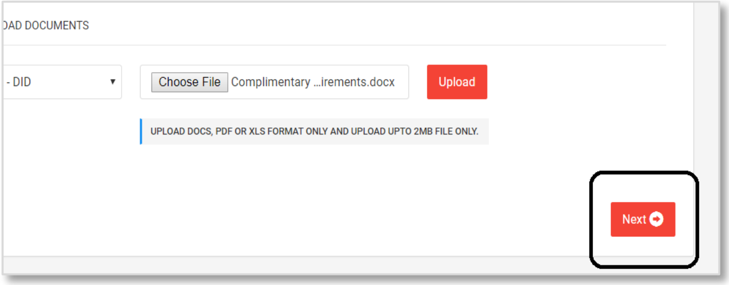
You can verify the TN(s) that has been added to your cart to the right of your screen:



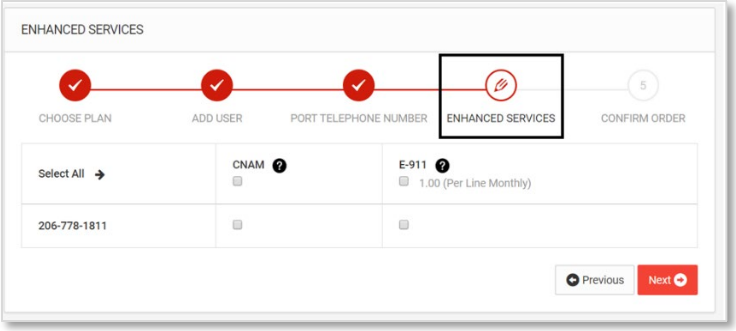
5. If you have a LOA or bill copy, now you will be able to upload it. Choose your document type from the drop down document type and then choose your file and click "Upload". You will need to upload each file separately:



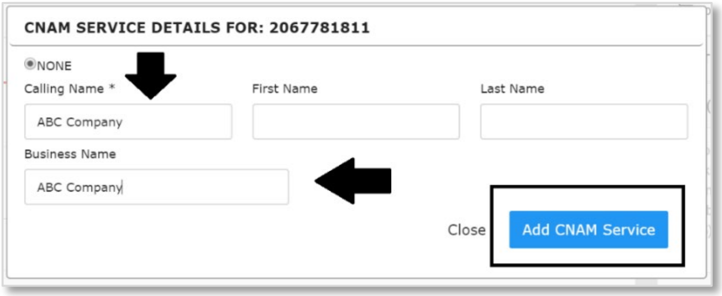
You may upload as many documents as you need. Once your documents have uploaded, click "Next" in the bottom right corner to move forward:



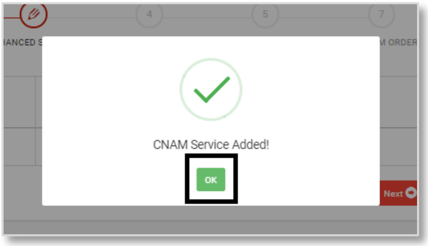
6. Next you have the option to select your Enhanced services (features). These are optional. To add CNAM (caller id name), select the radio button next to the DID under the CNAM column. If you wish to add the same name to all numbers, check the "Select All" radio button next to CNAM:



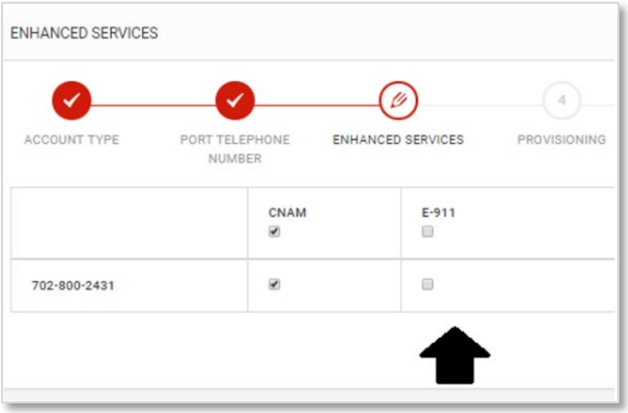
Once you click the CNAM button, you will receive a pop up to enter the CNAM information to be added to the LIDB database. Enter the end user name information you wish to be reflected and select "Add CNAM Service". This is the outbound name information displayed by phone number. *NOTE* Calling Name is limited to 15 alpha-numeric characters, including spaces:



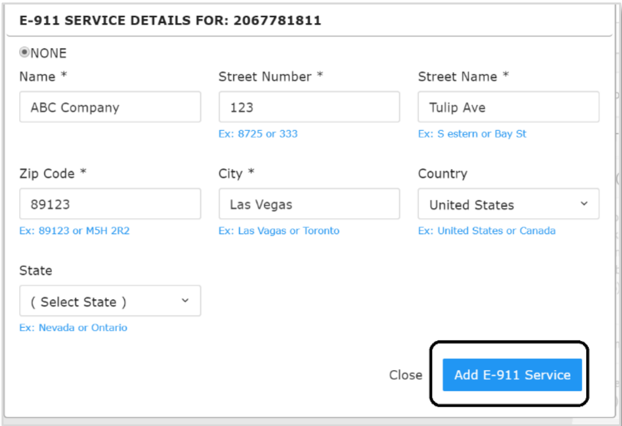
Once the record is added to the order, you should receive a pop up letting you know the CNAM was added, click "OK":



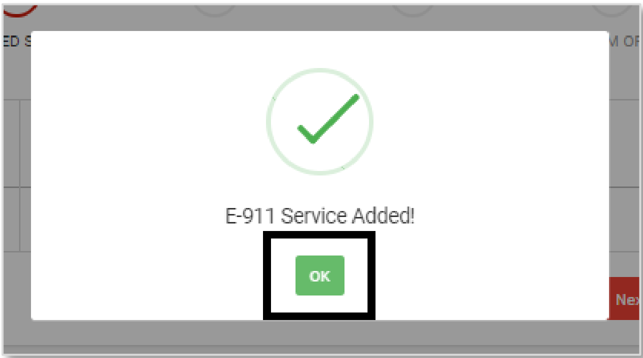
Next you can add an E911 record if you would like. If so, check the box under E911 just like CNAM. If you wish to add the same 911 address record to all numbers, check the "Select All" radio button next to E-911:



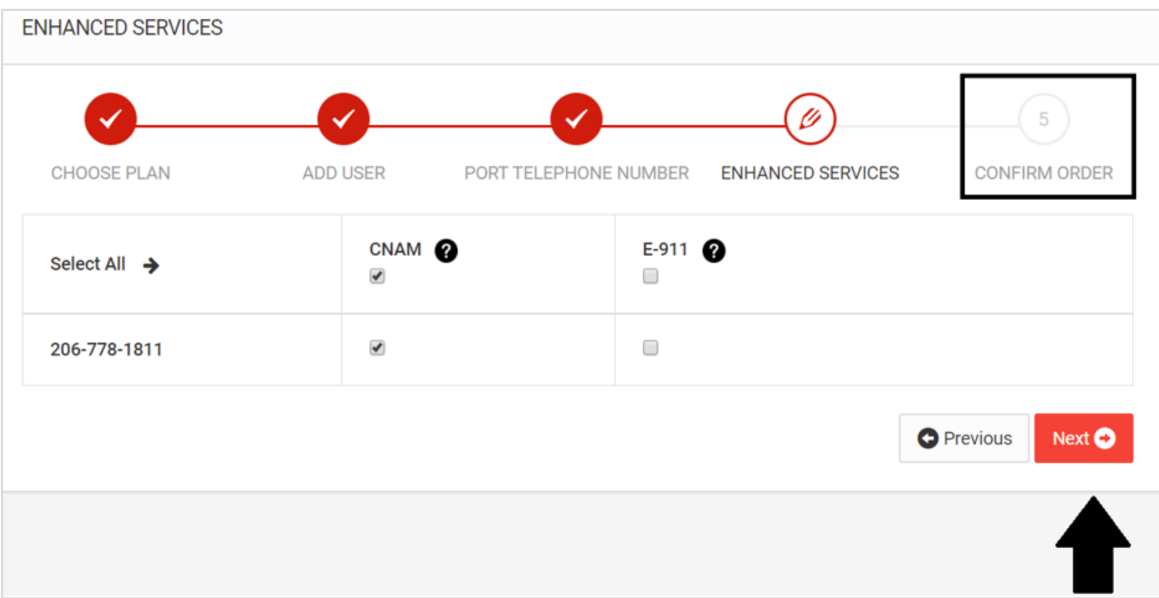
When you check the E911 box, you will receive another pop up to add the record information. Add the customer name, number and address to be associated then select "Add E-911 Service":



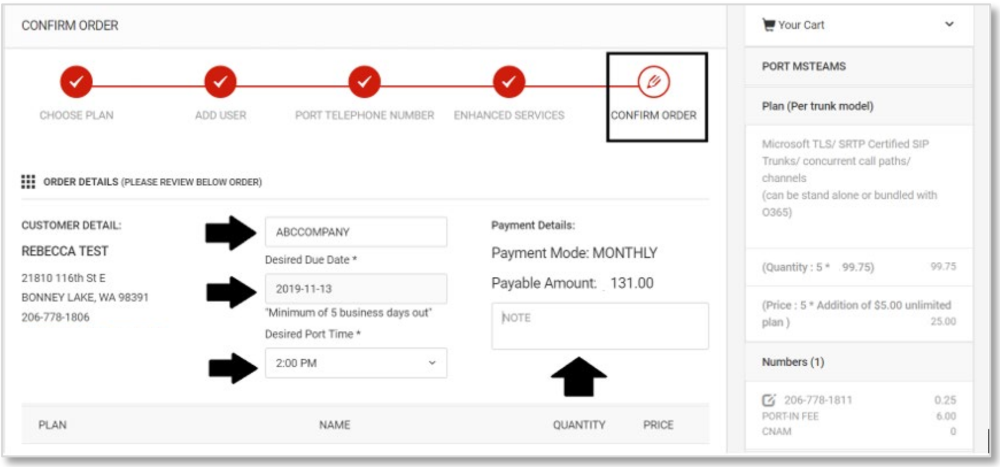
If your record is successfully added to the order, you will receive a pop up that it has been added. Click "OK". If the address does not validate with the postal system, you will need to adjust it until it validates or provides a valid correction. You will want to make sure you have the thoroughfares correct such as Dr instead of Drive or St instead of Street, as well as pre or post directional and zip codes:



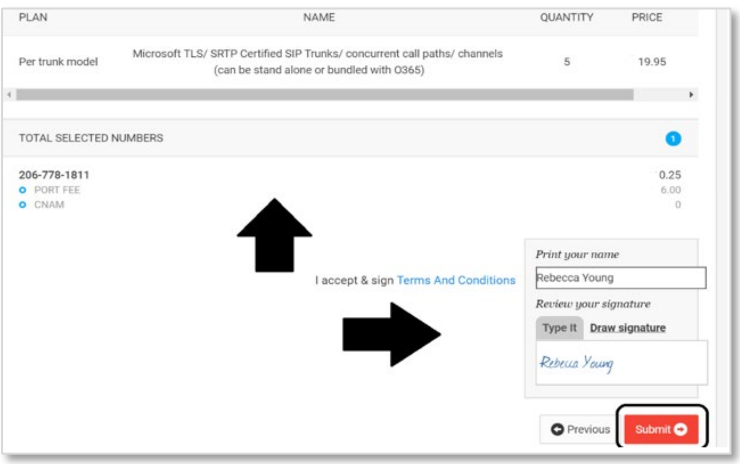
Once you are finished with any features you are adding, you may click "Next" at the bottom right corner to move on to the Provisioning tab. If you selected features, you will now see the boxes checked for the service:



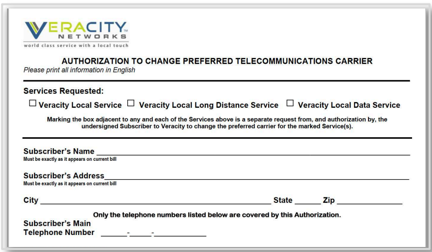
7. Now, confirm all the details of your order prior to submission. Enter a PON (purchase order number) for your personal tracking purposes. If you do not assign one, the order number assigned to you will become your PON. Next, enter your desired port date. The date requested cannot be sooner than 5 business days (excluding weekends and most major holidays). Most carriers issue FOC for 5-7 business days from port submission. Now enter the trigger time of your port. This is the time the carrier will trigger the port and release your numbers to us to activate. It will by default, set to 2pm Pacific time. Please note LNP support is only available 7am-5pm Pacific. You may also choose to add any additional notes in the notes section:



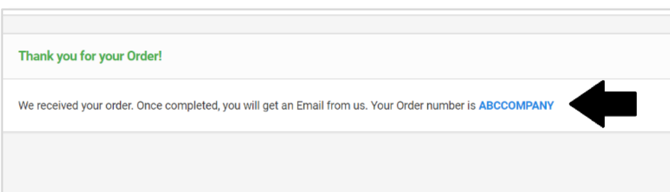
Now scroll down and verify your model details, phone numbers and features. You will then add your name into the "Print Name" field to accept the terms and conditions. Once you are ready, click "Next":



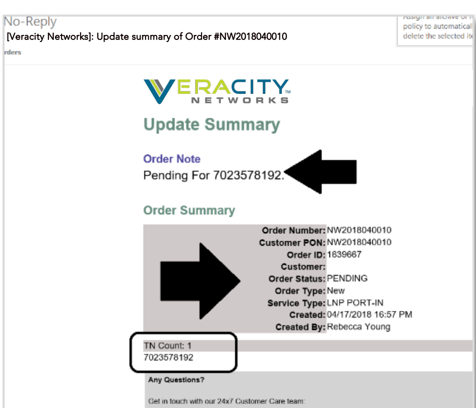
If you have uploaded your LOA at the beginning of your order, skip to step 10. If you have to sign the digital LOA, follow this step before moving on. Here you will sign your digital LOA copy. Please review to make sure the information is correct, digitally sign the LOA in the upper left hand corner and click "Submit Order" on the upper right hand corner once you are ready to submit the document with your order:



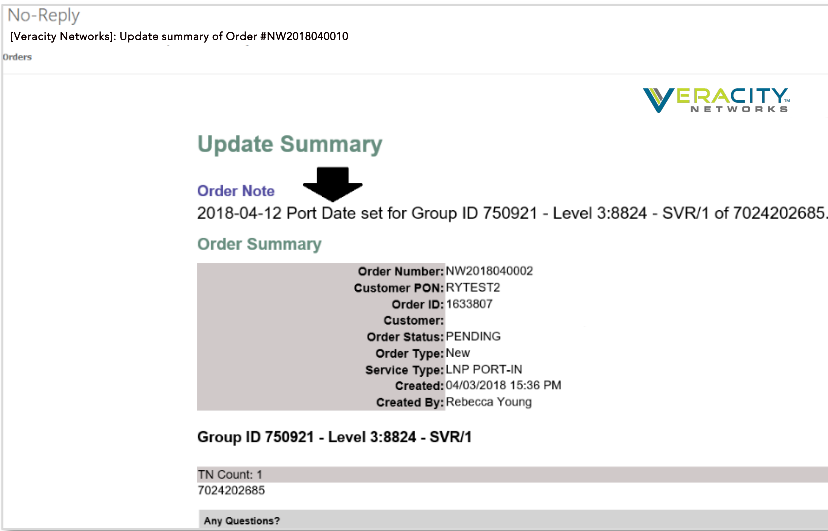
8. You will receive a confirmation page acknowledging that your order has been submitted. If you wish to return to your order to view, you may click on the blue PON link:



9. Next you will receive an update that the order is "Pending". This means it has been submitted and is pending a carrier/system response. It should show order notes and all of your order information as well as the number(s) being requested to port:



10. Once you have a response, you will either receive an email that the port has a port date set, or that it is rejected. Below is an example of one that has received a FOC port date. In the note the port date is noted per the group of numbers requested for 4/12/18. For port completion see step 16 .**See step 14 for rejected orders and Step 15 for edits or cancels:



No-Reply
[Veracity Networks]: Update summary of Order #NW2018040010
Orders

Update Summary

Order Note
2018-04-12 Port Date set for Group ID 750921 - Level 3:8824 - SVR/1 of 7024202685.

Order Summary

Order Number:	NW2018040002
Customer PON:	RYTEST2
Order ID:	1633807
Customer:	
Order Status:	PENDING
Order Type:	New
Service Type:	LNP PORT-IN
Created:	04/03/2018 15:36 PM
Created By:	Rebecca Young

Group ID 750921 - Level 3:8824 - SVR/1

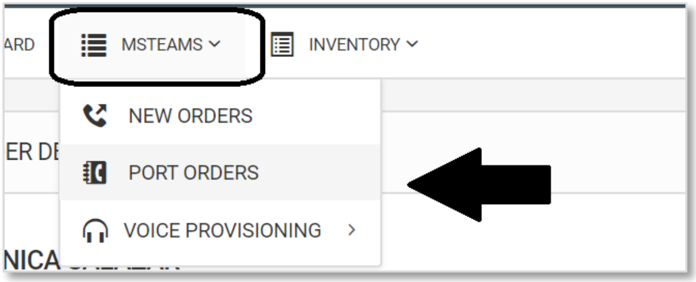
TN Count: 1
7024202685

Any Questions?

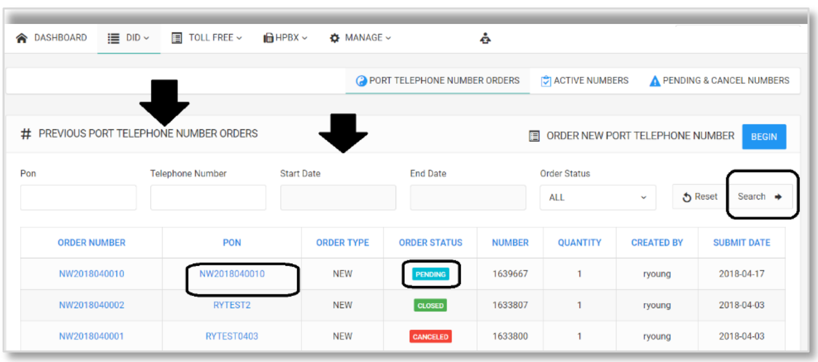
11. If your order is rejected, you should receive the same email but, in the notes it will have a reason for reject. The items you may edit on your order to resubmit are the following:

- Address
- Authorization Name
- Business Name
- Residential or Business Service Type
- You may remove any TNs from the order (you cannot add TNs to an order)
- Desired Due Date
- Port Time
- PON
- Add additional documents or notes

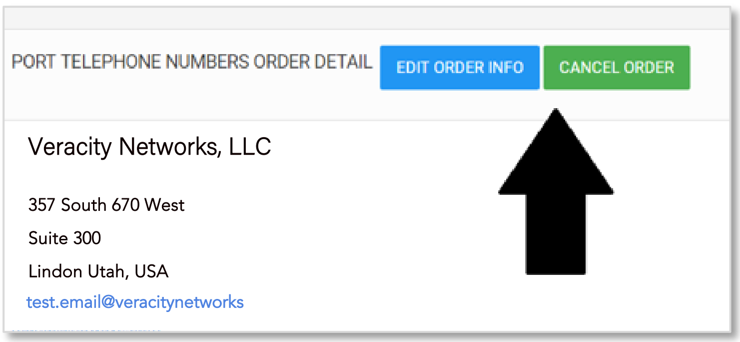
12. You may view, edit or cancel your order by first locating your order by going to your dashboard and clicking back on MSTEAMS and then "Port Orders":



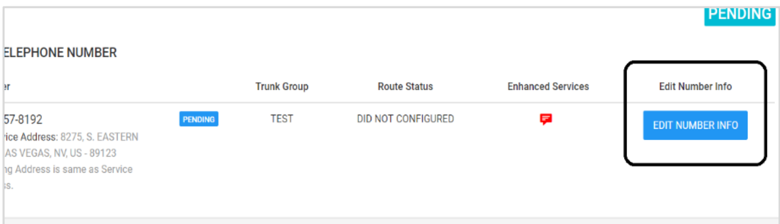
You can search for your order by specific information, or you can search from the list of all orders below. Find your pending order and click on either the PON or Order Number link to get to your order:



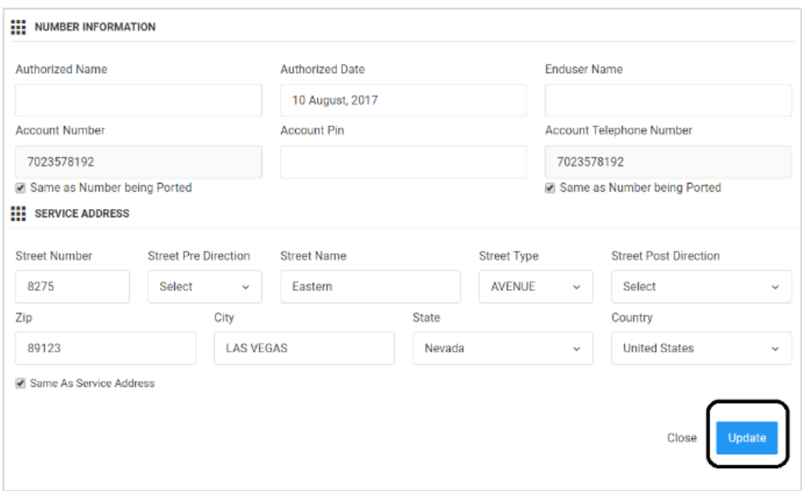
Once you are in your order, you may either edit or cancel the order but selecting one of the two click options at the top of the page. You may also view the information and status of your order. This option allows you to edit either the PON or desired due date for port:



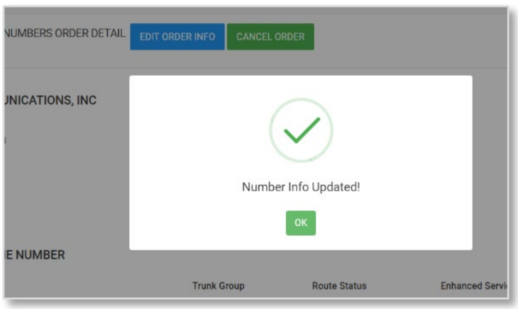
If you wish to edit any other order information allowed, go down to the bottom right corner of the page, and select "Edit Number Info":



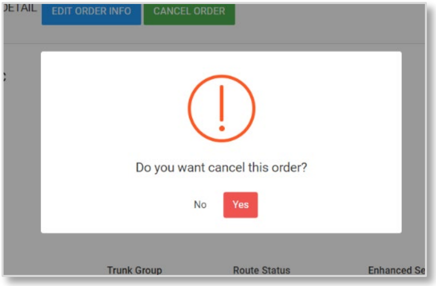
Once the order detail page pops up, edit the information you need to edit and then select "Update" in the bottom right hand corner:



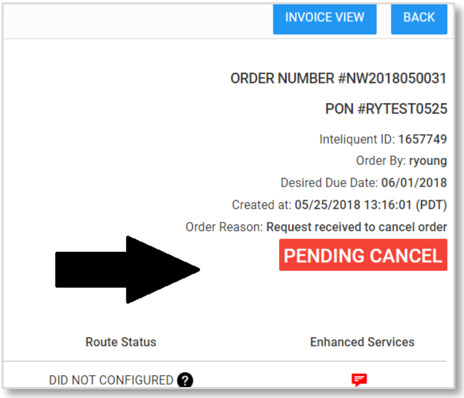
Once you click update you will receive a pop up that will notify you that the information was updated:



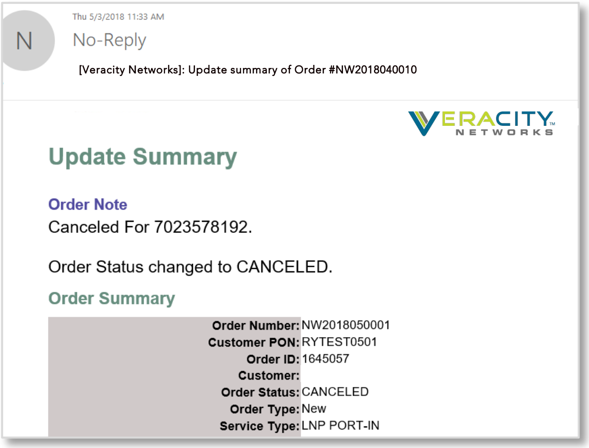
If you are canceling your order, select the "Cancel Order" button. You will be prompted with a pop up requesting you to confirm that you want to cancel the order. If you still do, select the "Yes" button:



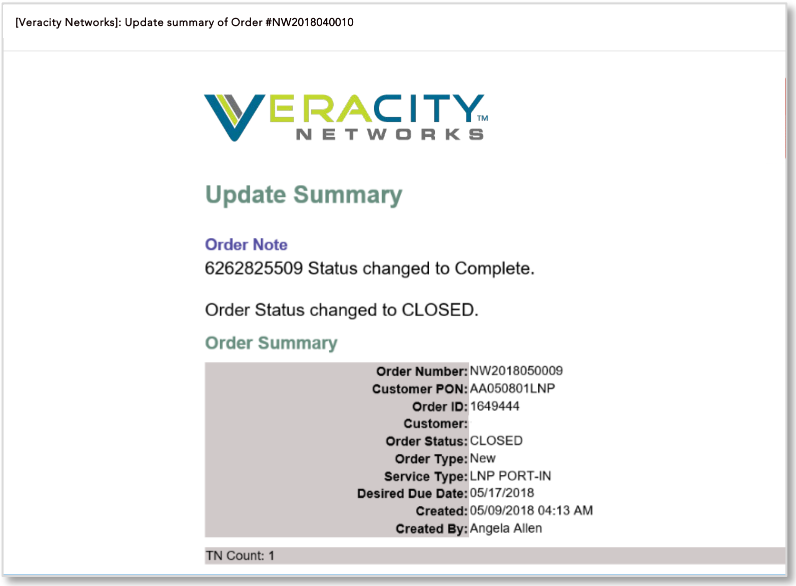
Your order will then show "Pending Cancel" until the cancel is complete:



Once your order is completely canceled, you will receive an updated email advising you that it is completed:



13. On the day of your port, the number(s) will trigger at the time selected (Pacific Time). Once the trigger is complete, you will receive an email letting you know your order is closed/complete. Once you have any applicable users provisioned to any numbers, you can now test them. If you do not yet have users assigned, the calls will route but with no user to complete the call to. If there are any issues, please report them to CustomerServiceGroup@veracitynetworks.com



[Veracity Networks]: Update summary of Order #NW2018040010

Update Summary

Order Note
6262825509 Status changed to Complete.

Order Status changed to CLOSED.

Order Summary

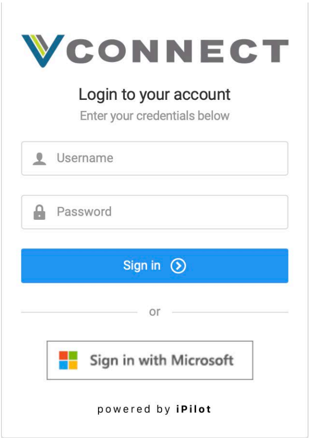
Order Number:	NW2018050009
Customer PON:	AA050801LNP
Order ID:	1649444
Customer:	
Order Status:	CLOSED
Order Type:	New
Service Type:	LNP PORT-IN
Desired Due Date:	05/17/2018
Created:	05/09/2018 04:13 AM
Created By:	Angela Allen

TN Count: 1

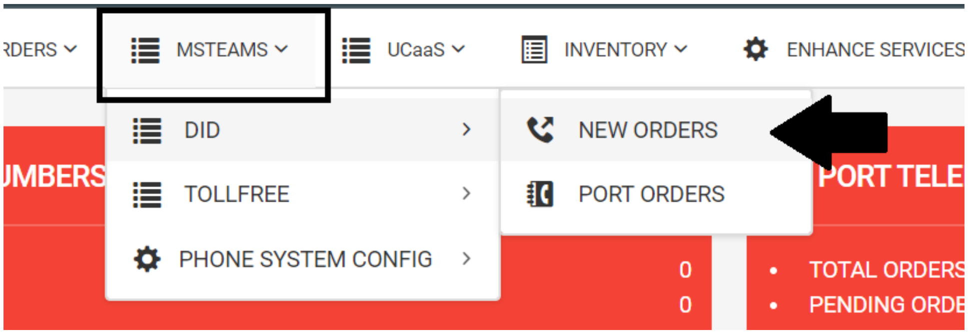
14. Once services are complete, a billing notice will be sent to our billing department and services will be added to your account appropriately.

Adding Additional Trunks No Other Services

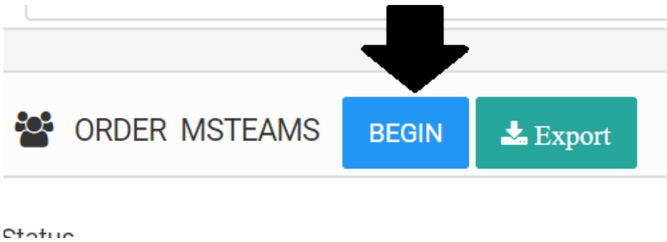
1. Log into the Vconnect Portal using your user log in: https://vconnect.veracityteams.com/index.php/site/login



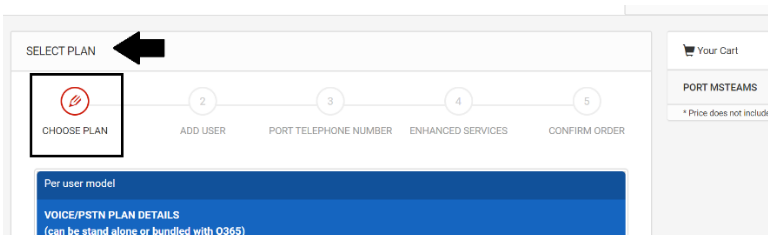
2. Once you are logged in, you will see the main dashboard. To start a Veracity request, click on "MSTEAMS" at the top of your Dashboard and then select "DID" and then "New Orders":



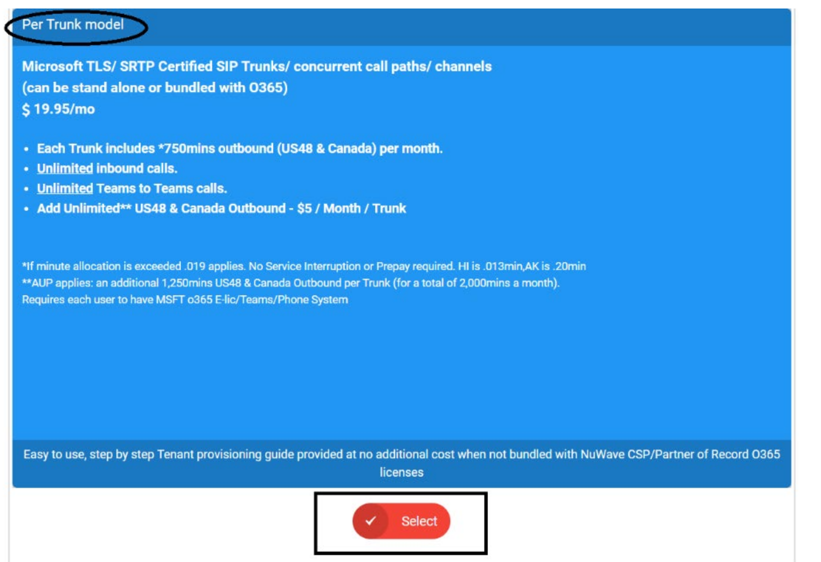
- This will bring you to the ordering screen where you can view previous orders and start a new order. To start a new DID order, select "Begin" in the upper right hand corner:



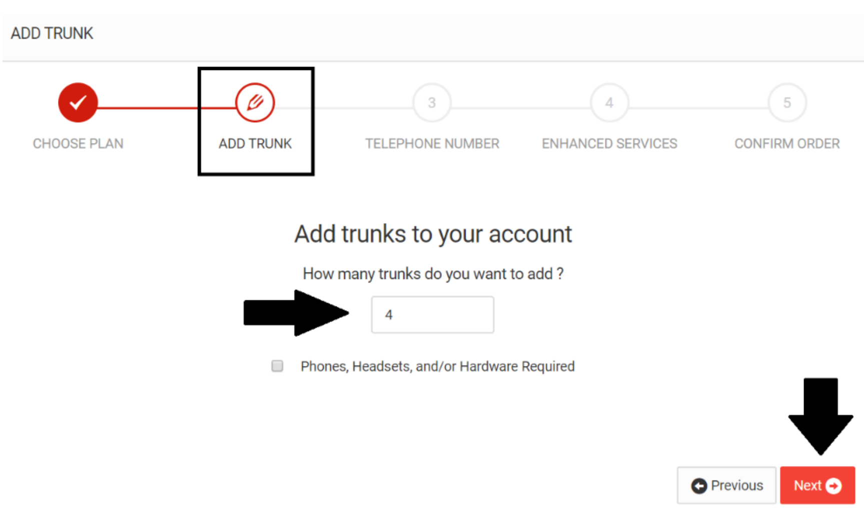
3. Since you have already set up your initial Veracity service, you will only have your current plan to choose from:



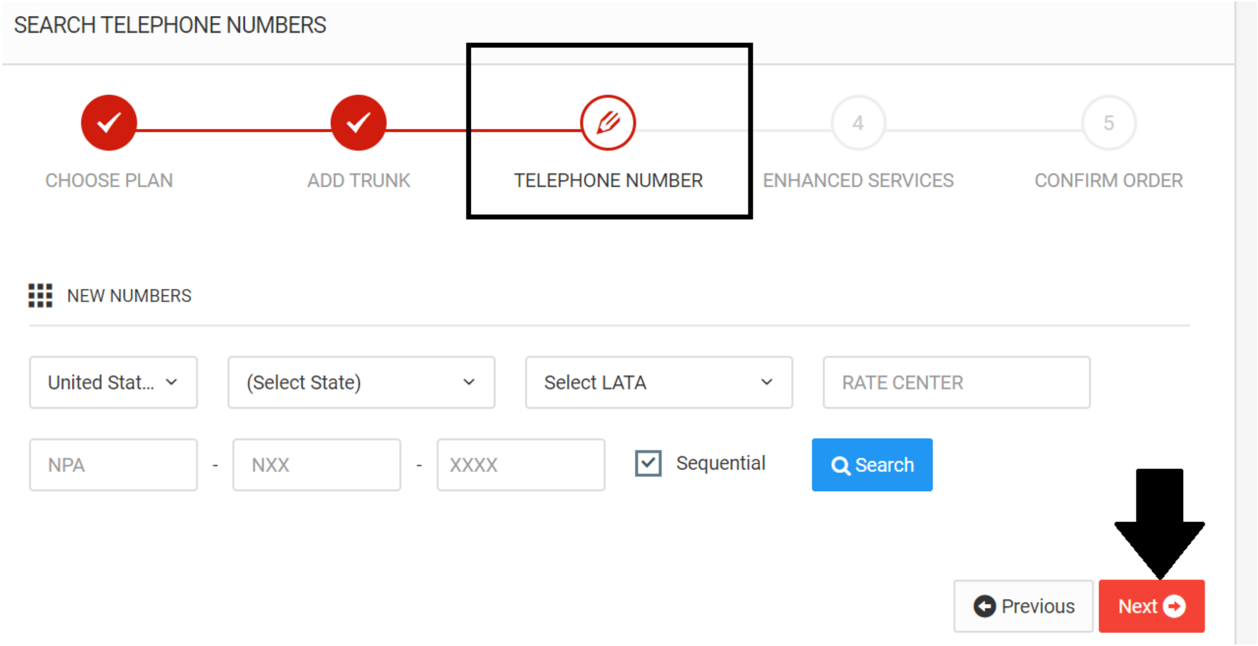
- Select your per trunk plan. Click "Select" under your per trunk plan:



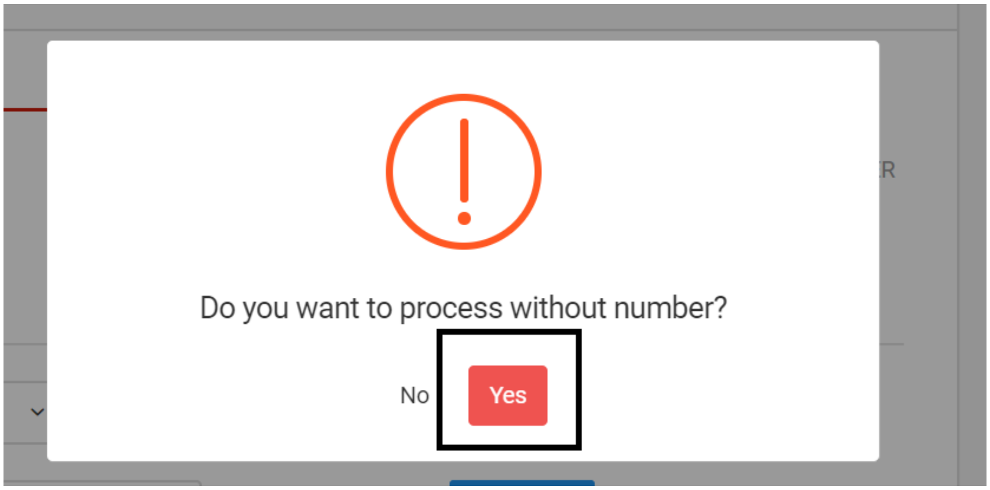
4. Now enter the number of trunks that you wish to order and click "Next":



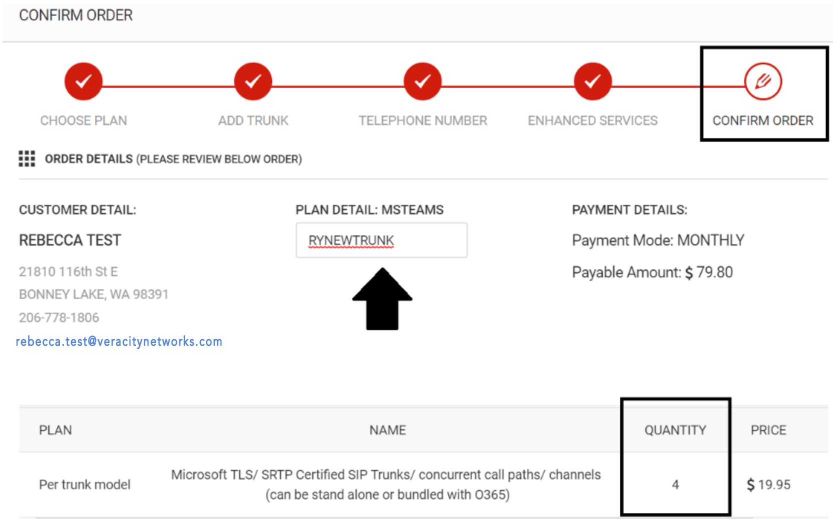
5. Next you will be prompted to search and add new DID numbers but since you are only ordering trunks with no other service, do not enter any information and just click "Next" to move on:



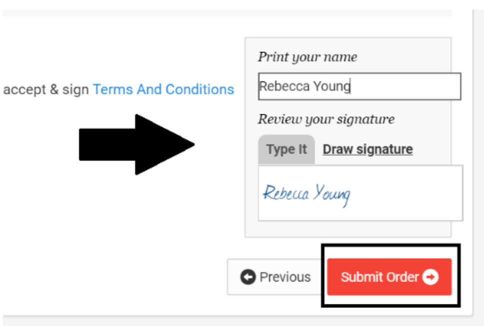
- The system will prompt you to confirm that you want to proceed. Select "Yes" to continue:



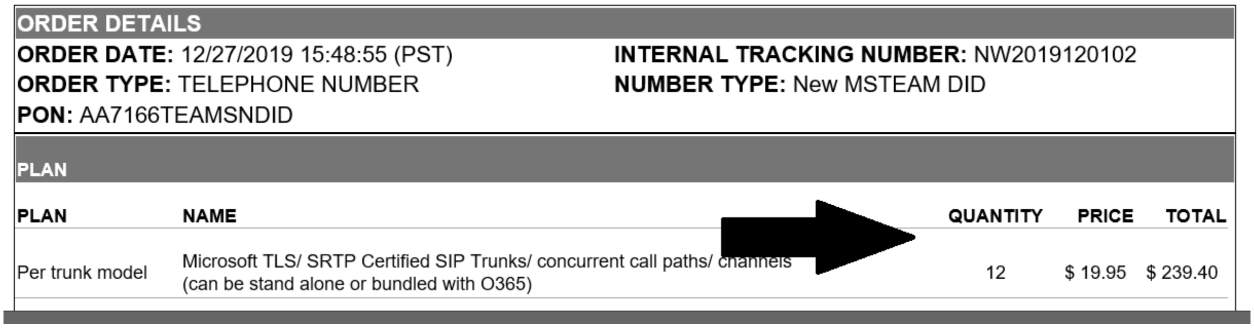
6. Now you will reach the confirm order screen where you will confirm the number of additional trunks you are ordering in the middle right of the page, and enter your PON (purchase order number) for tracking purposes:



- To complete your order scroll down to the bottom of the page and type in the authorized signers name to digitally sign the order and click "Submit Order":



7. Your trunks should be available within a short period of time and you will receive a confirmation email of your order and a completion notice once the trunks are complete and ready for use:



ORDER DETAILS

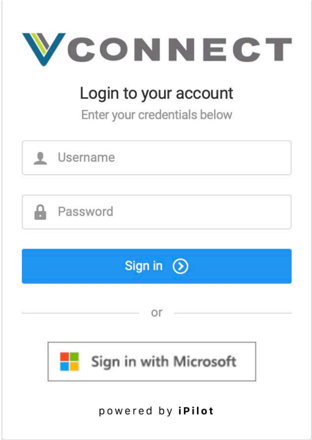
ORDER DATE: 12/27/2019 15:48:55 (PST)
INTERNAL TRACKING NUMBER: NW2019120102
ORDER TYPE: TELEPHONE NUMBER
NUMBER TYPE: New MSTEAM DID
PON: AA7166TEAMSNDID

PLAN

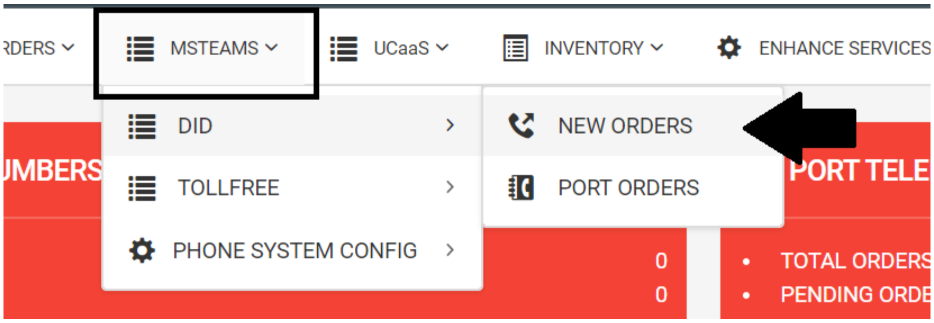
PLAN	NAME	QUANTITY	PRICE	TOTAL
Per trunk model	Microsoft TLS/ SRTP Certified SIP Trunks/ concurrent call paths/ channels (can be stand alone or bundled with O365)	12	$ 19.95	$ 239.40

Adding Phones or Hardware with no other services

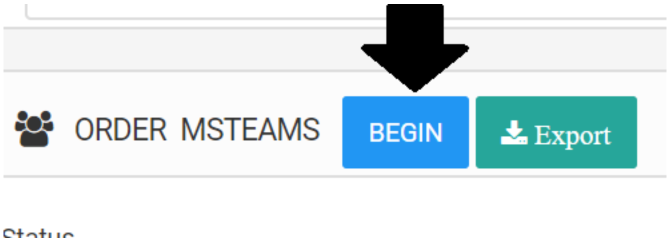
1. Log into the Vconnect Portal using your user log in: https://vconnect.veracityteams.com/index.php/site/login



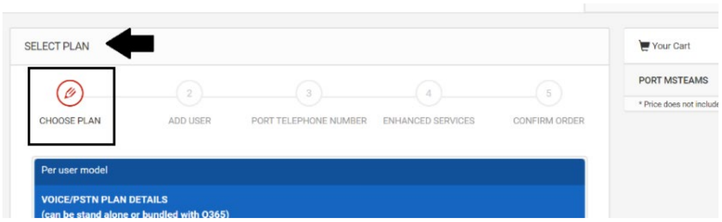
2. Once you are logged in, you will see the main dashboard. To start a Veracity request, click on "MSTEAMS" at the top of your Dashboard and then select "DID" and then "New Orders":



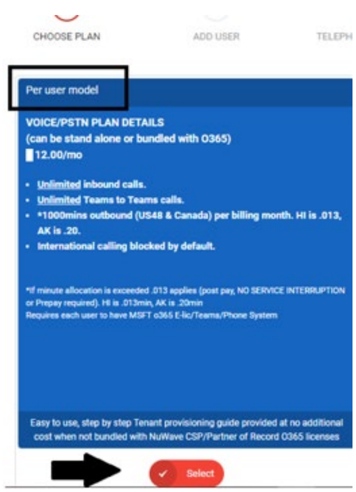
- This will bring you to the ordering screen where you can view previous orders and start a new order. To start a new DID order, select "Begin" in the upper right hand corner:



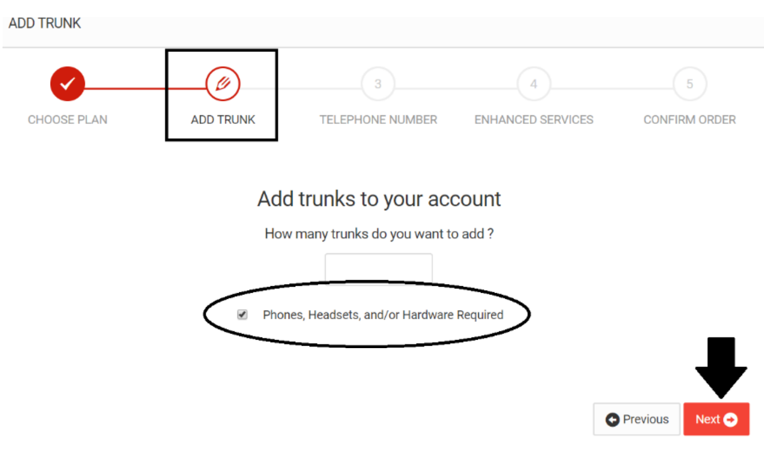
3. Since you have already set up your initial Veracity service, you will only have your current plan to choose from:



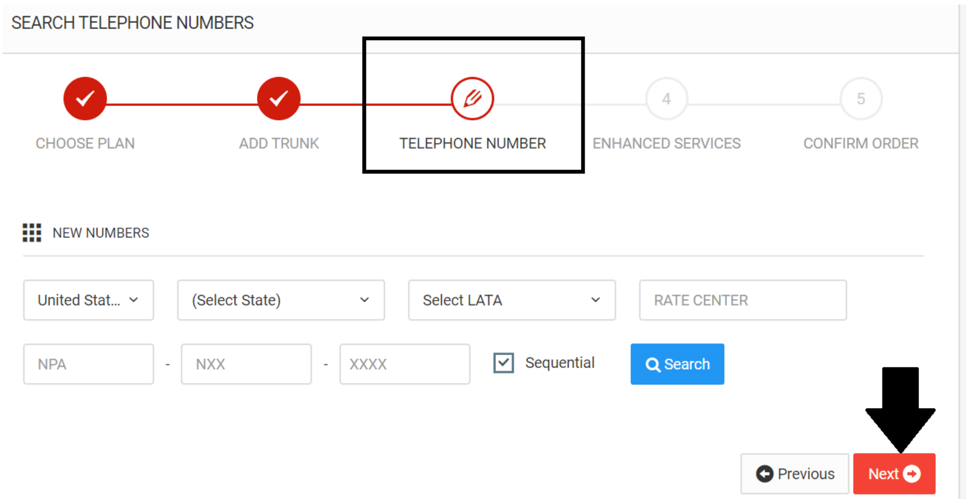
- Select your plan. Click "Select" under your current available plan:



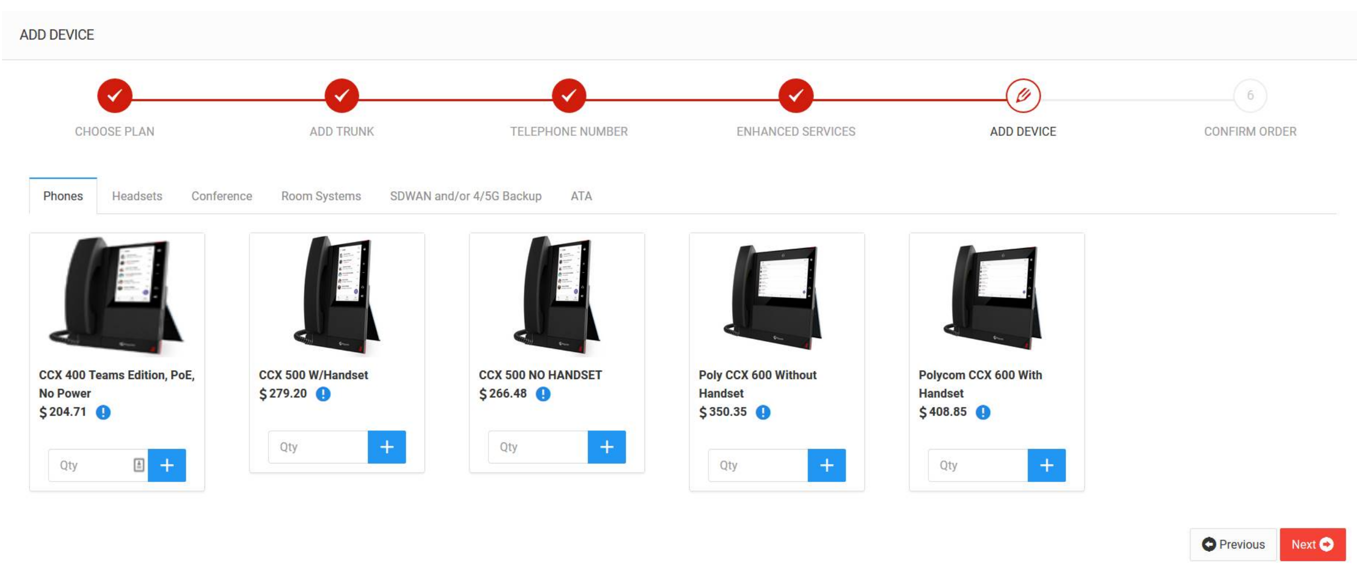
- Now the system will request that you enter the number of trunks or users you wish to add. Since you are only here to order additional phones or hardware for your existing Veracity service, either leave the field blank or enter "0". Now check the box that says "Phones, Headsets, and o/or Hardware". Once finished, select "Next":



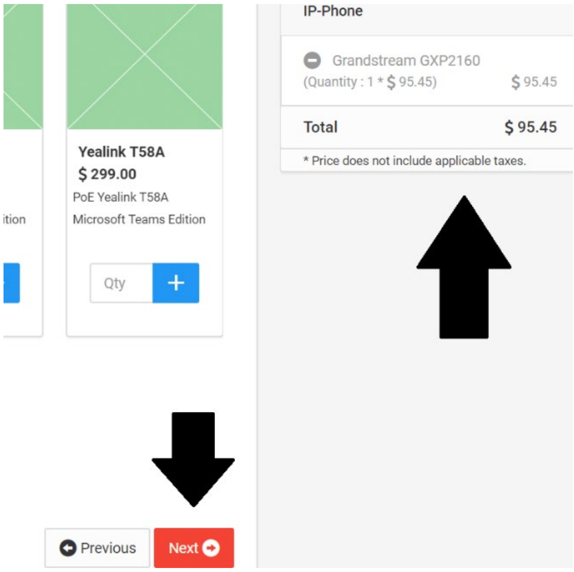
4. Next you will be prompted to search and add new DID numbers but since you are only ordering hardware with no other service, do not enter any information and just click "Next" to move on:



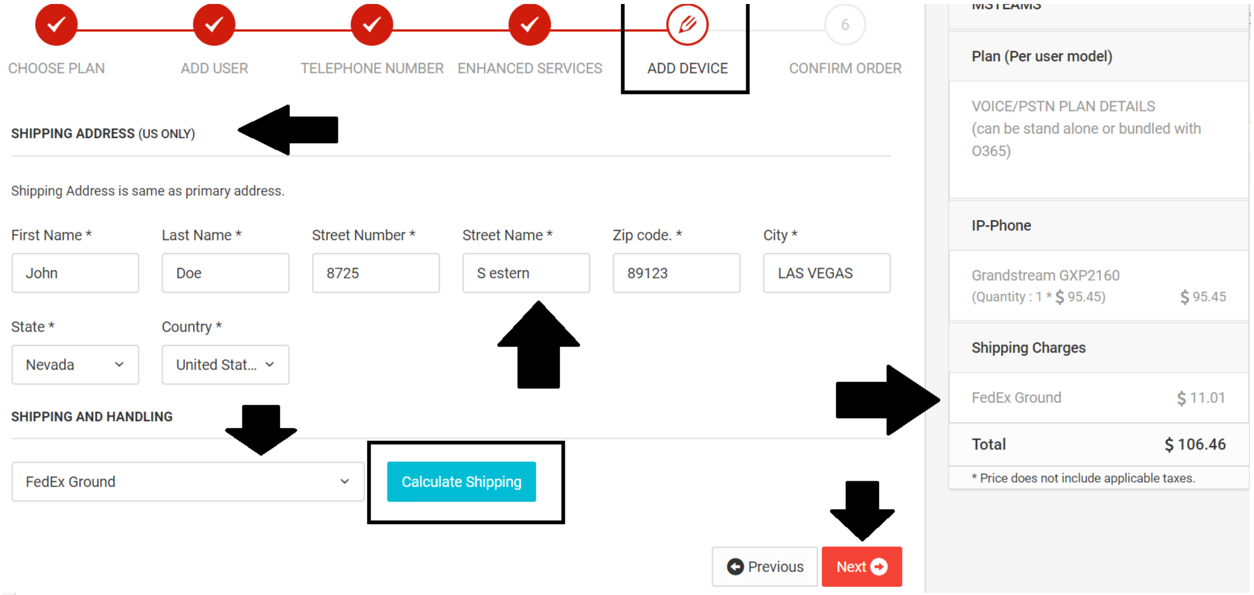
5. Now you will be asked to add the devices to your cart that you wish to order. You can click through the tabs of different types of hardware. Add the quantity under the device of your choosing and click the + sign to add to your cart:



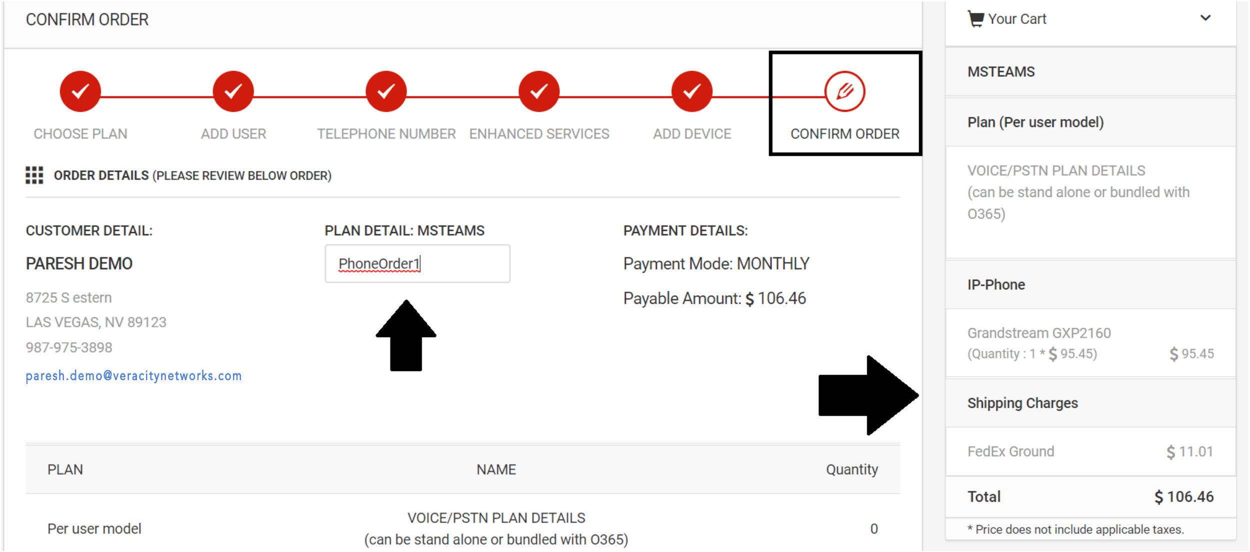
- Once you have all the devices you need in your cart, scroll down and click "Next":



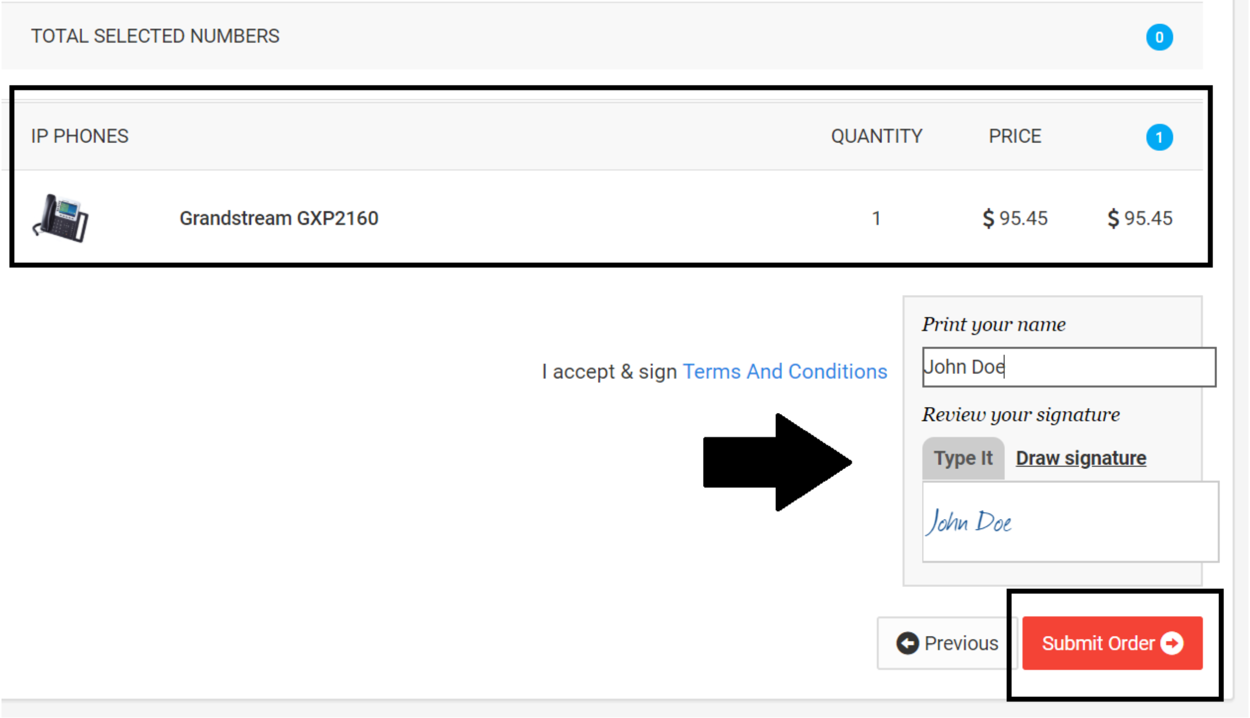
6. Now you will need to enter your shipping information. The system will auto generate shipping with the main address and contact listed on your account. Make sure you make any necessary changes. Once address and name are confirmed, select your shipping method and click "Calculate Shipping" to add the shipping amount to your cart. Once finished, click "Next" at the bottom:



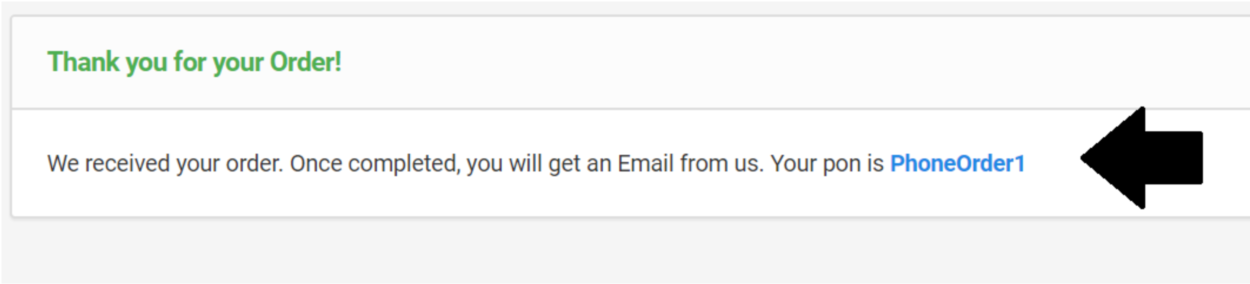
7. Lastly, confirm your account and order information. Verify your cart and add your PON (purchase order number) for tracking purposes:



- Scroll down and verify your hardware and the quantity. Once ready, enter the authorized name on your account to confirm the order and click "Submit Order":



8. You should now see the confirmation page with a copy of your PON to link back to your order:



- You will receive an email update from no-repy@veracitynetworks.com with updates on the shipping of your devices and you can also check your order in the portal for additional information.

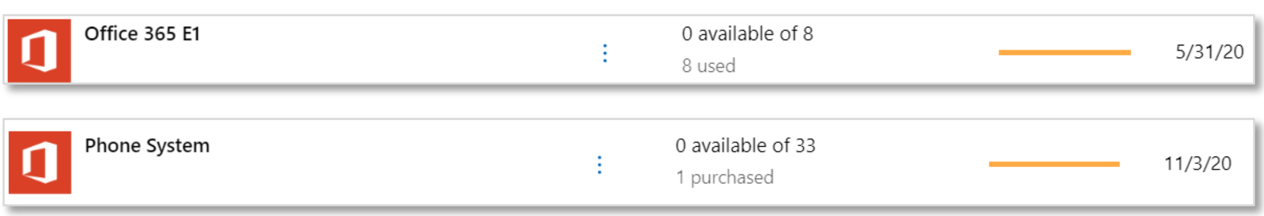
Setting Up Your Account for Automated Onboarding

In order to complete the automated onboarding process, you will need the following:

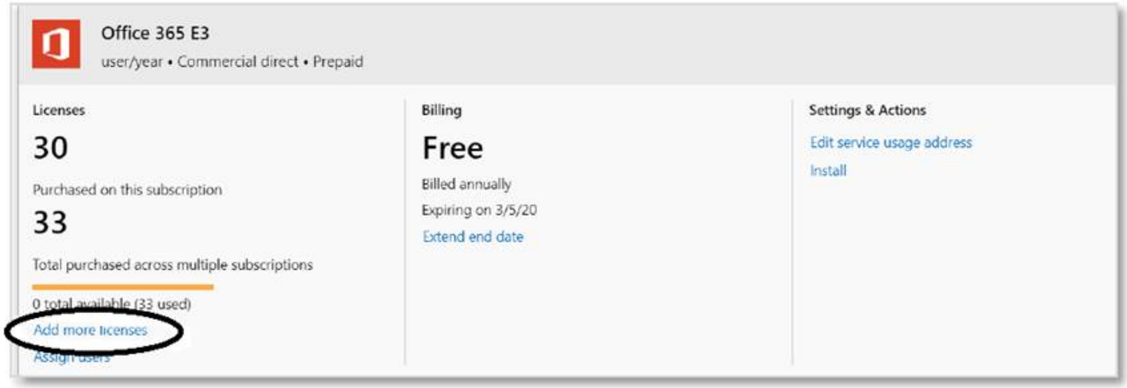
- The credentials for your Global Administrator Account in your Microsoft Office 365 tenant.
- 2 unassigned E3 licenses and 2 Phone System User licenses, purchased in that tenant.

SPECIAL NOTE: If you get your Microsoft Licensing through a Microsoft Cloud Solutions Provider (CSP) or other third party, proceed to Step 7 AFTER purchasing the above licenses from your vendor.

1. Log into your Microsoft O365 tenant from http://admin.microsoft.com/
2. Select Billing->Products & Services
3. This will bring you to: https://admin.microsoft.com/AdminPortal/Home#/subscriptions/
4. This will bring you to licensing that will look something like this:



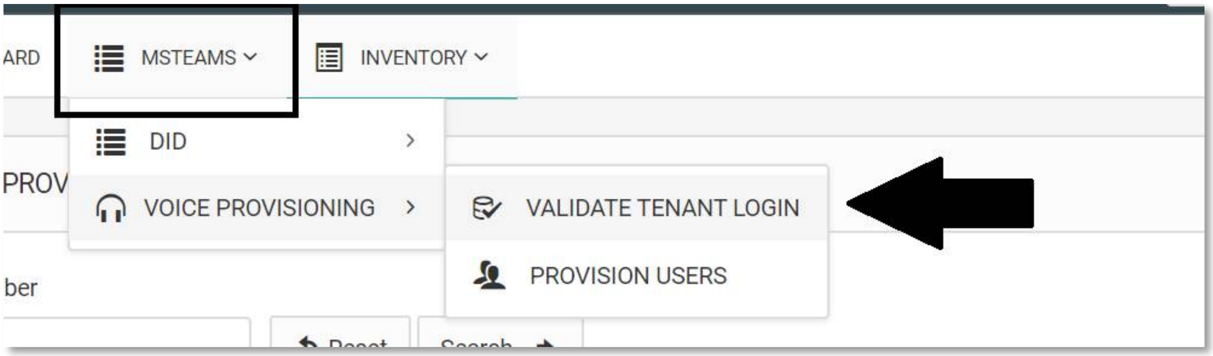
5. Click into each and add 2 licenses



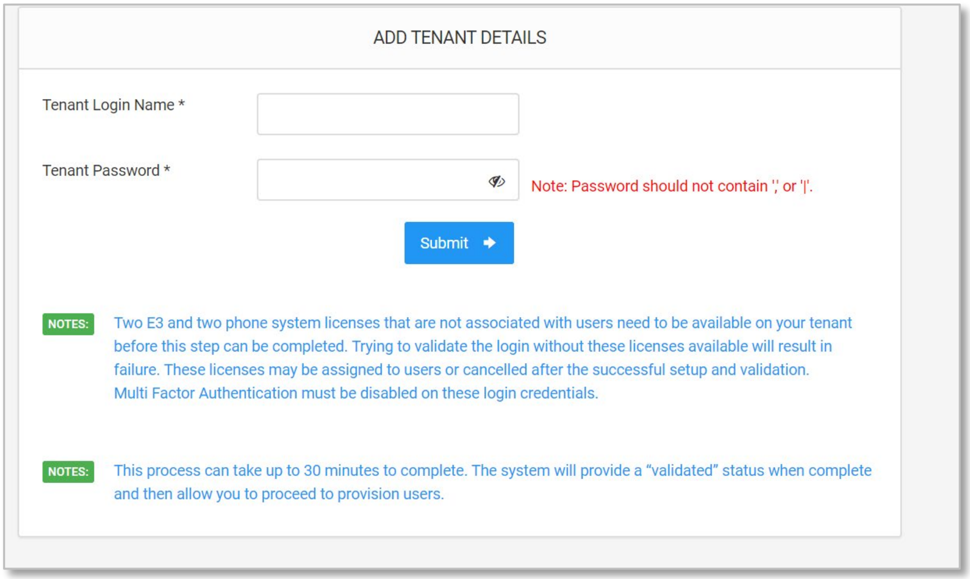
6. You will be asked to select your total number of licenses and add credit card information if required.

7. Log into the Vconnect portal from https://vconnect.veracityteams.com/index.php/site/login

8. Once there, Select **MSTEAMS->Voice Provisioning -> Validate Tenant Login**

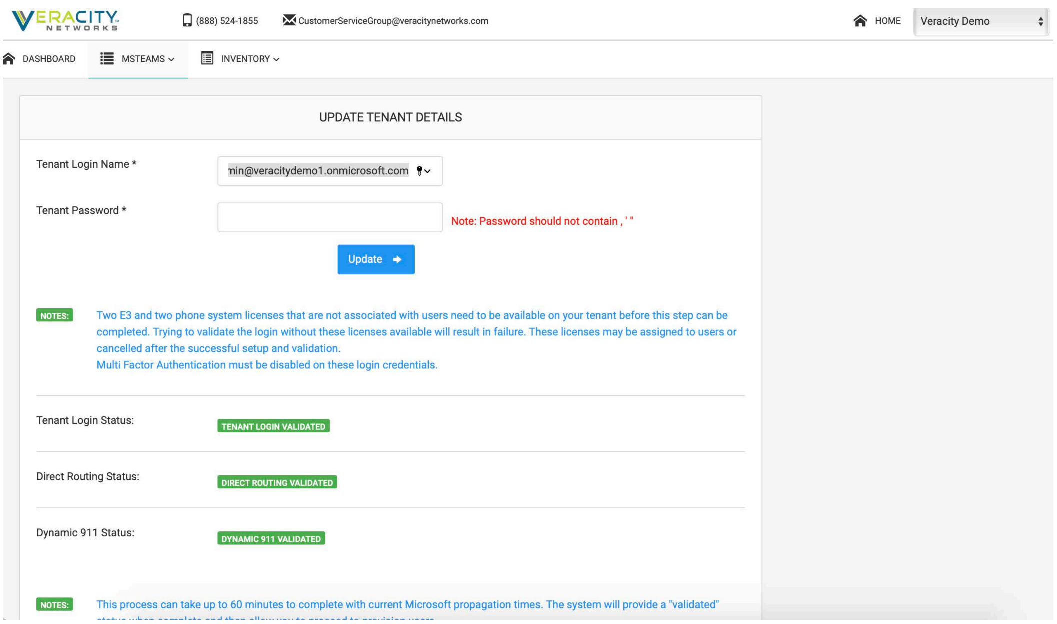


9. When you first arrive at this screen, it will look like this:

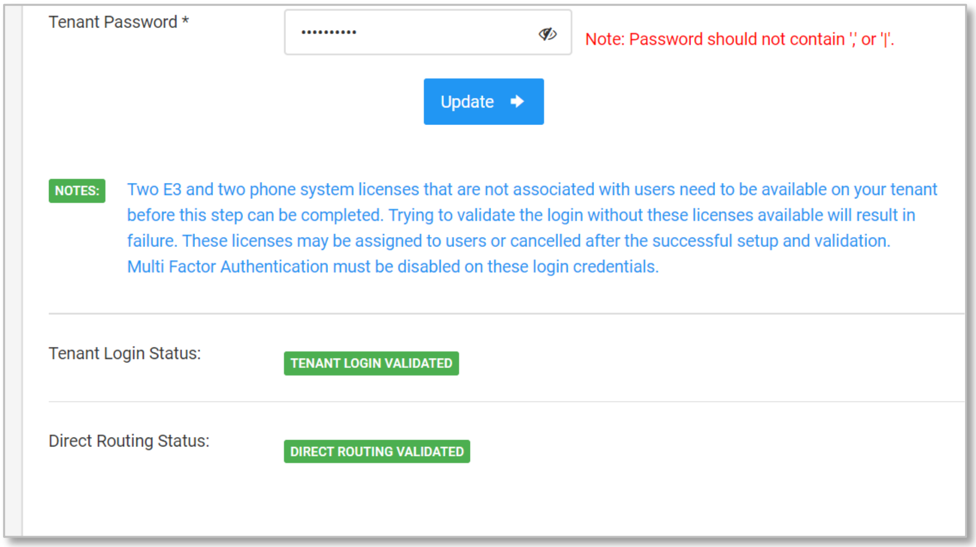


10. Enter your Global Administrator account details, and click Submit

11. You should see a variety of status screens as the process completes. This can take some time, as the automation will move through multiple steps, each of which have their own propagation times.



12. When the process is completed, the two green validation boxes will appear.



13. Once this process has completed, you may begin testing and provisioning numbers to your users.

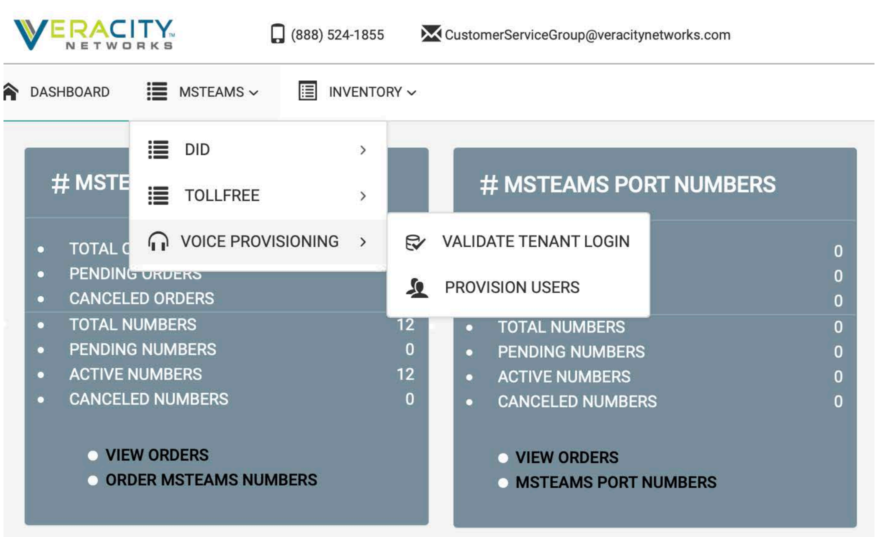
Provisioning Numbers to Users

Prerequisites:

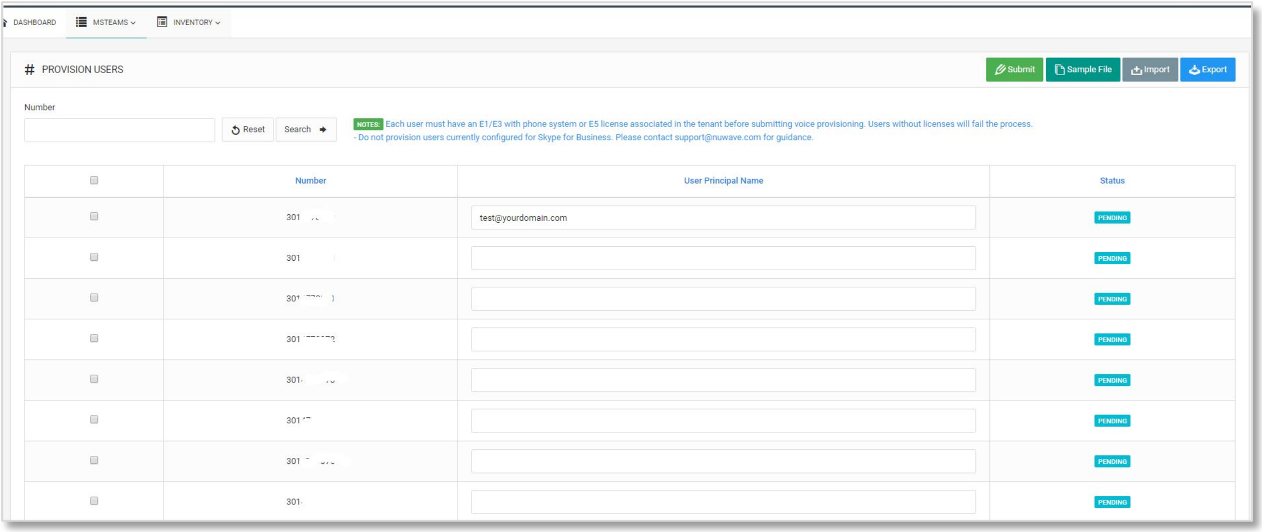
1. An active Office 365 tenant.
2. Completion of the above Automated Onboarding Process.
3. New or Ported Numbers in the Vconnect portal per the above process.
4. Users created in the Office 365 portal with one of the following sets of licensing attached:
    - An E1 and a Phone System User License
    - An E3 and a Phone System User License
    - An E5 License
    - Microsoft 365 Business voice (without calliong palns) for US adoption promo.

Provisioning Numbers to Users One at a Time

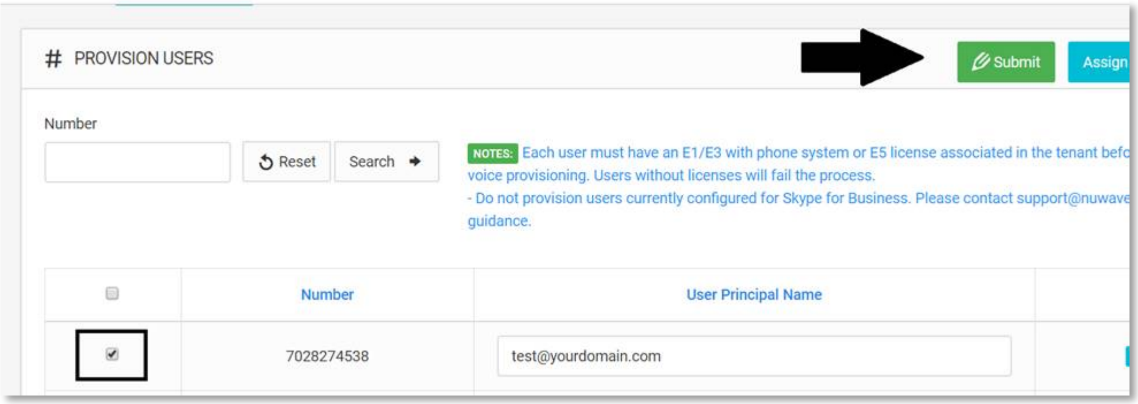
1. From the iPilot portal select MSTEAMS -> Voice Provisioning -> Provision Users



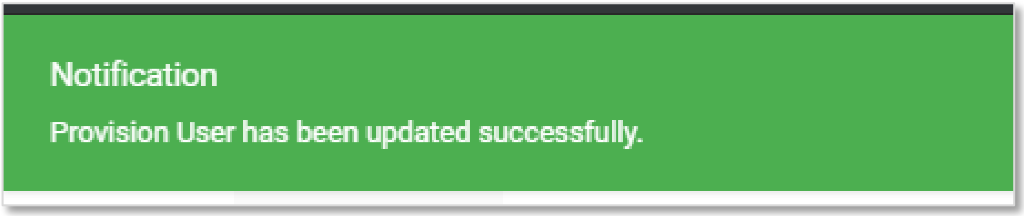
2. From this screen, type in the User Principal Name (Email address) of a user that already has appropriate licenses assigned to it. Be sure to check the box on the left



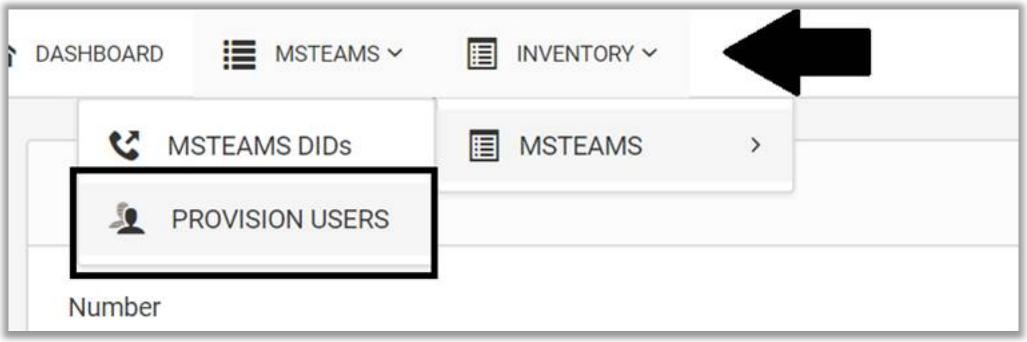
3. Then, check the box on the left, and click Submit.



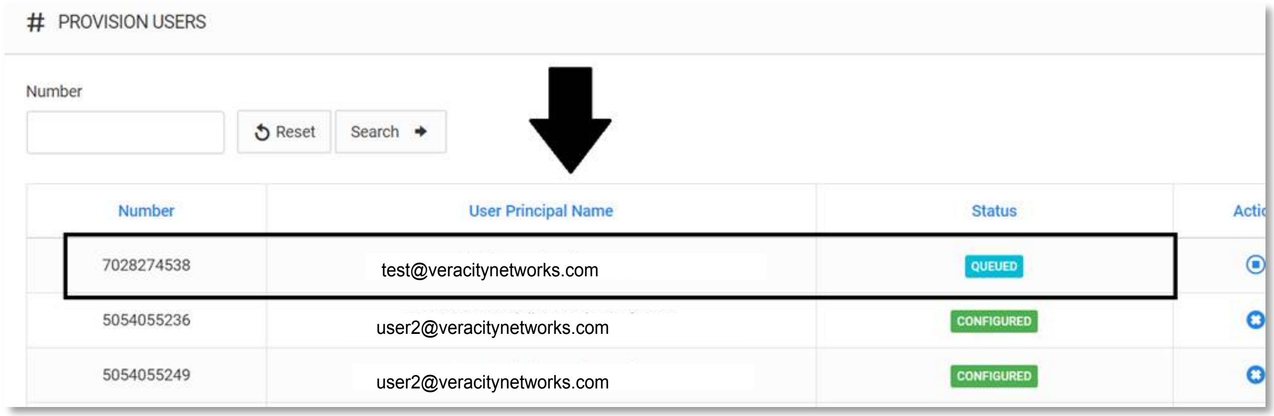
4. An update will appear on the top of the screen letting you know the provisioning has been submitted.



5. Then select Inventory->MSTEAMS->Provision Users

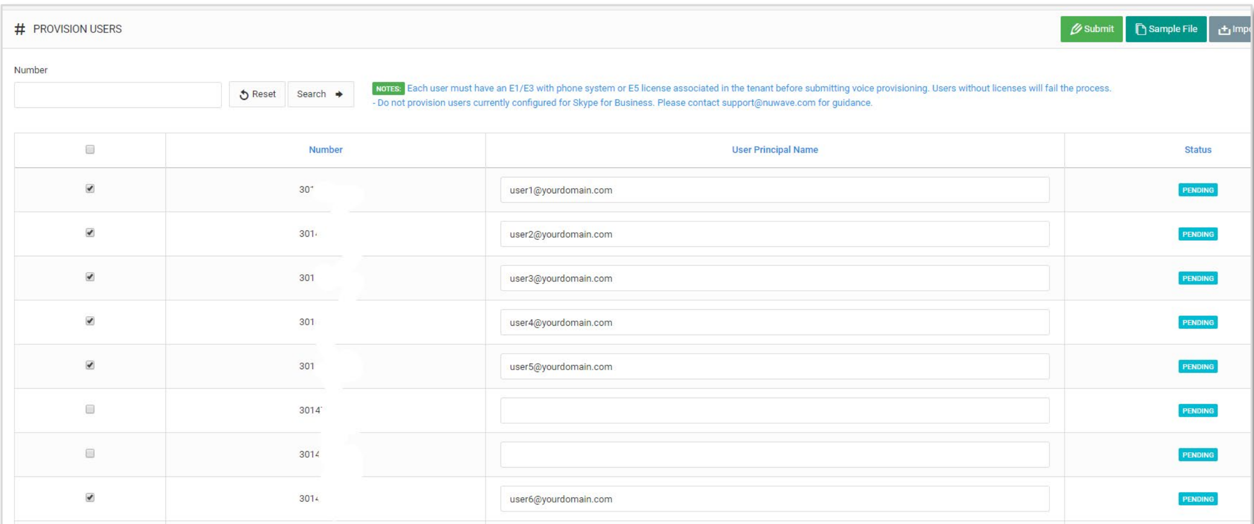


6. This will display your pending changes as shown below. After some time, the "Queued" status will change to "Configured" and the number can be tested



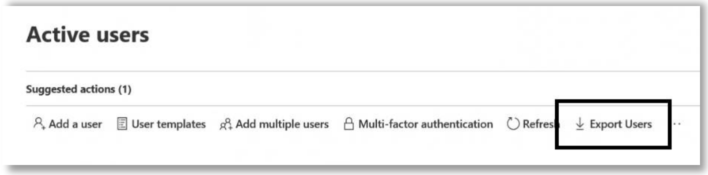
Provisioning Numbers to Multiple Users

The process is identical to the above, except you will fill in multiple fields, and check multiple boxes. Fields without checks or User Principal Names will not be assigned.

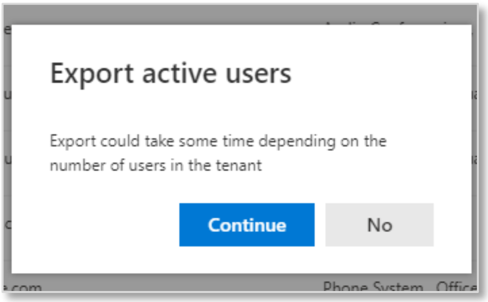


Provisioning Numbers to Multiple Users Utilizing a Spreadsheet Exported from Microsoft Office 365

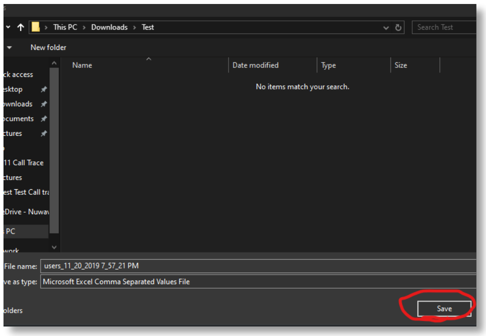
1. Begin by exporting the user list from your Office 365 tenant.
2. Log into the portal http://admin.microsoft.com/
3. Select Users->Active Users
4. Select Export Users



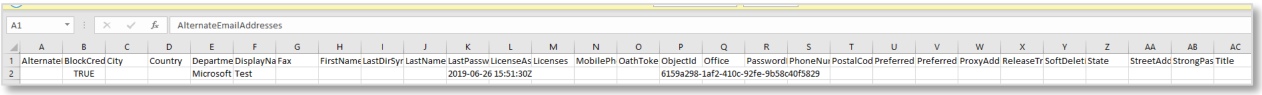
5. Select Continue



6. Name your file, and click "Save"



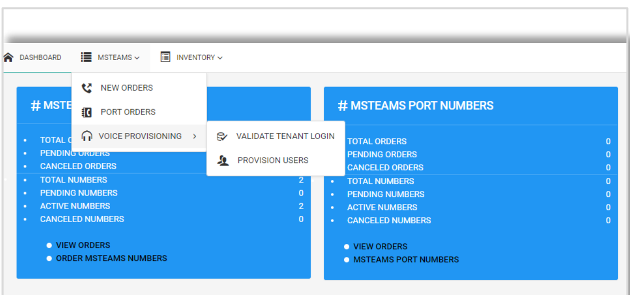
7. The file will look something like this example, with many entries



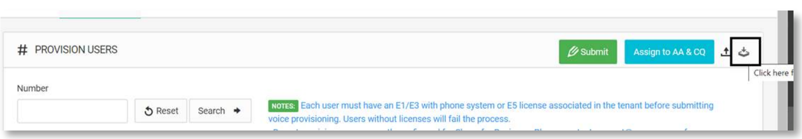
8. Then export your available numbers list from the Vconnect portal

9. Log in to https://vconnect.veracityteams.com/index.php/site/login

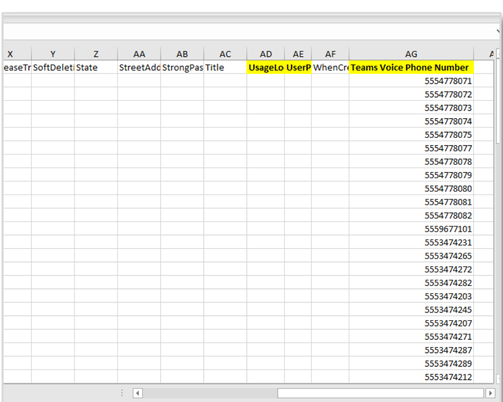
10. Select **MSTEAMS -> Voice Provisioning -> Provision Users**



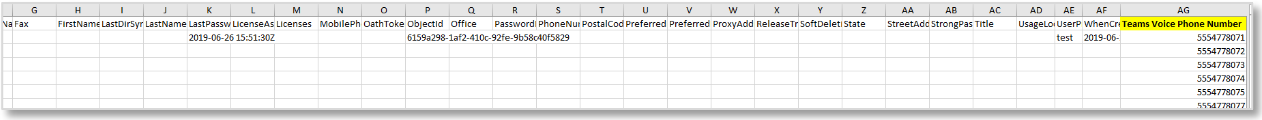
11. Select "Export"



12. The file will look like this example. Of special note is column "AG", where the numbers will be listed



13. Merge the two together so that the Information from the Office 365 list is pasted into the Vconnect template spreadsheet. Make sure to get ALL data from the microsoft spreadsheet, which may involve scrolling right to get all the way to column "AF". This means the first 32 columns will be microsoft, and the 33rd will be the numbers exported from Vconnect.



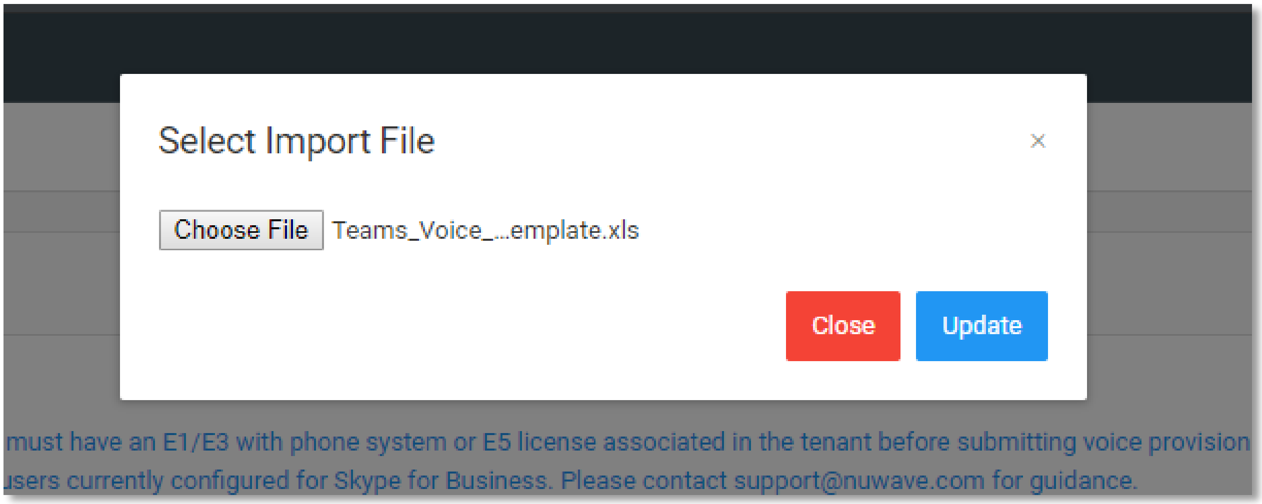
	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG
Na	Fax	FirstName	LastDirSyr	LastName	LastPassw	LicenseAs	Licenses	MobilePh	OathToke	ObjectId	Office	Passwordl	PhoneNu	PostalCod	Preferred	Preferred	ProxyAdd	ReleaseTr	SoftDeleti	State	StreetAdc	StrongPas	Title	UsageLo	UserP	WhenCr	Teams Voice Phone Number
					2019-06-26 15:51:30Z					6159a298-1af2-410c-92fe-9b58c40f5829															test	2019-06-	5554778071
																											5554778072
																											5554778073
																											5554778074
																											5554778075
																											5554778077

14. Remove any numbers you do not intend to assign

15. Save the file

16. Import the list to Vconnect by uploading it

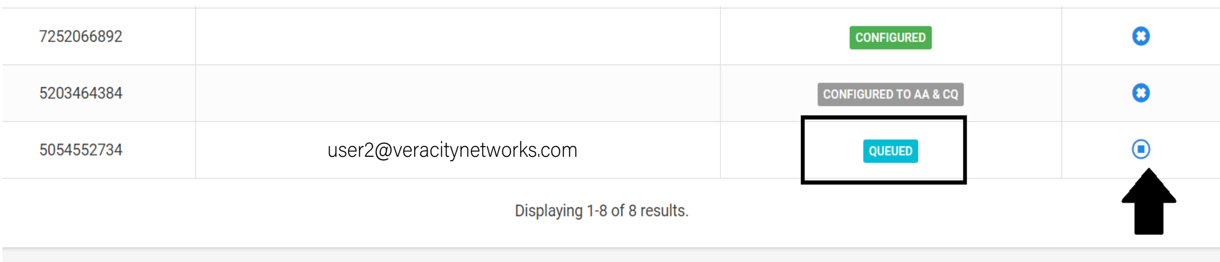
17. Select "Choose file", and then select update after selecting the file you just saved.



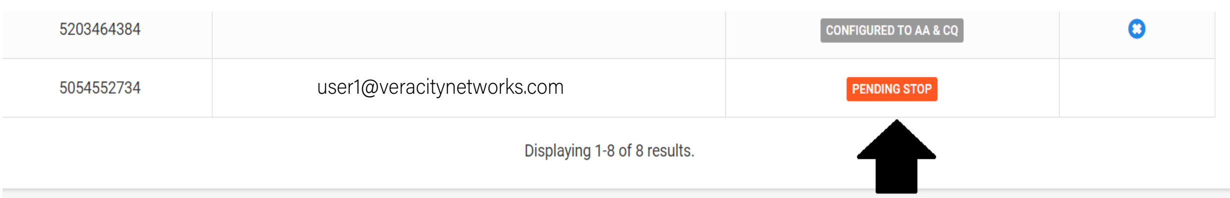
18. Click "Submit".

How to Stop a Queued UPN/DID, Reset and Return to Inventory

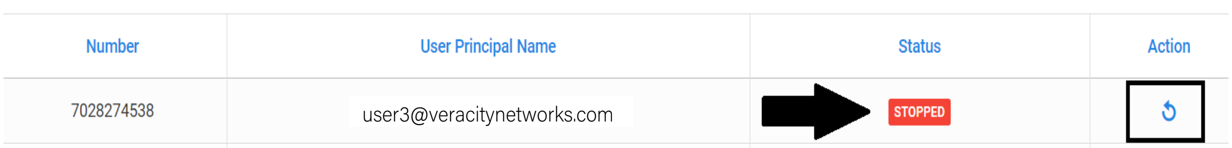
1. If you have assigned the wrong UPN to a number or, the number is stuck in a queued status (numbers should not take longer than 30 minutes to finish queuing and assign), you may stop and reset it. First under the UPN/DID number you wish to edit, click the stop button to the right:



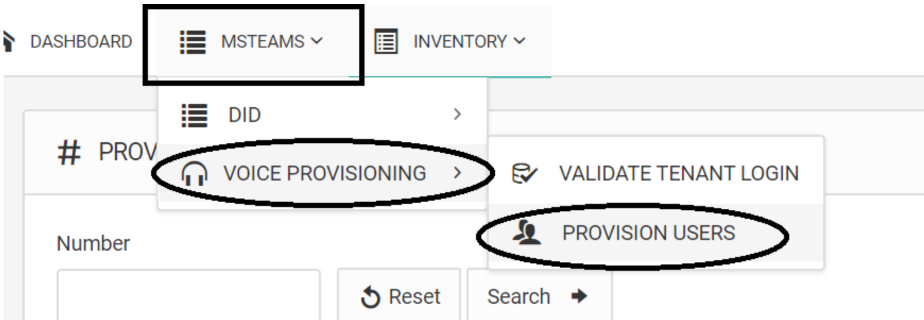
- The screen will refresh once it has successfully stopped the queuing and it will show "Pending Stop":



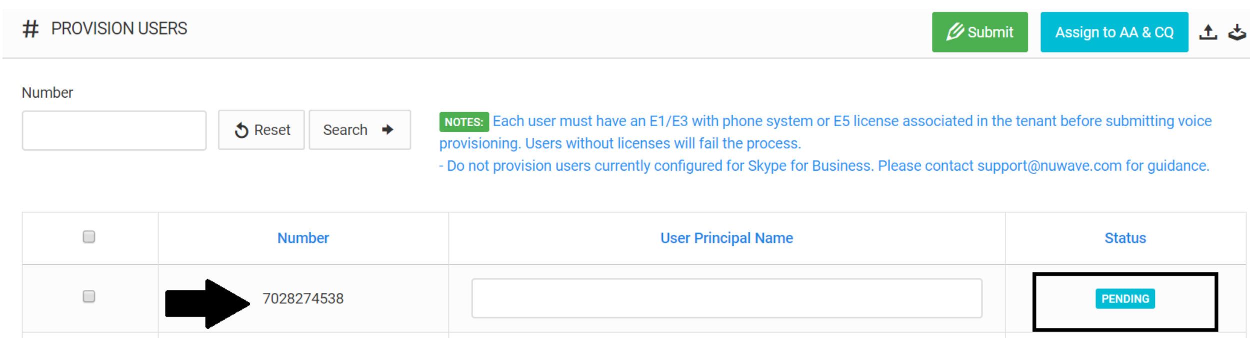
2. Once the queuing has stopped completely, the status will change to "Stopped" and you can then reset the number so it will return to the available inventory:



- Once the number is successfully released back to the queue, you can return to reassign or leave it for later assignment. Go back up to the MSTEAMS menu and select "Voice Provisioning" and then "Provision Users" to get back to your available inventory:



3. The number is now unassigned and pending ready for assignment:

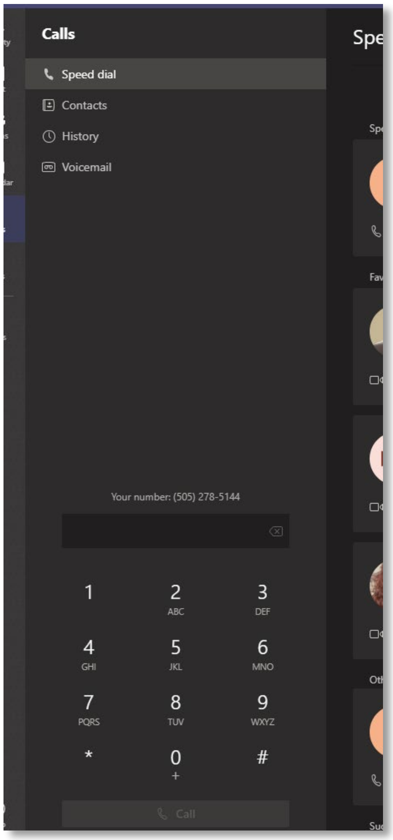


Testing Your New Configuration

The simplest way to test your new configurations basic functions is to log into an account with a DID provisioned to it using the Microsoft Teams desktop app, which can be downloaded from https://www.microsoft.com/en-us/microsoft-teams/download-app

It is important to note that if the user is already logged into Teams, they should be logged out of all instances, and then logged back in after the provisioning process is completed.

Once logged in select the call tab from the left, and then click the dialpad button at the bottom left if the dialpad isn't already visible.



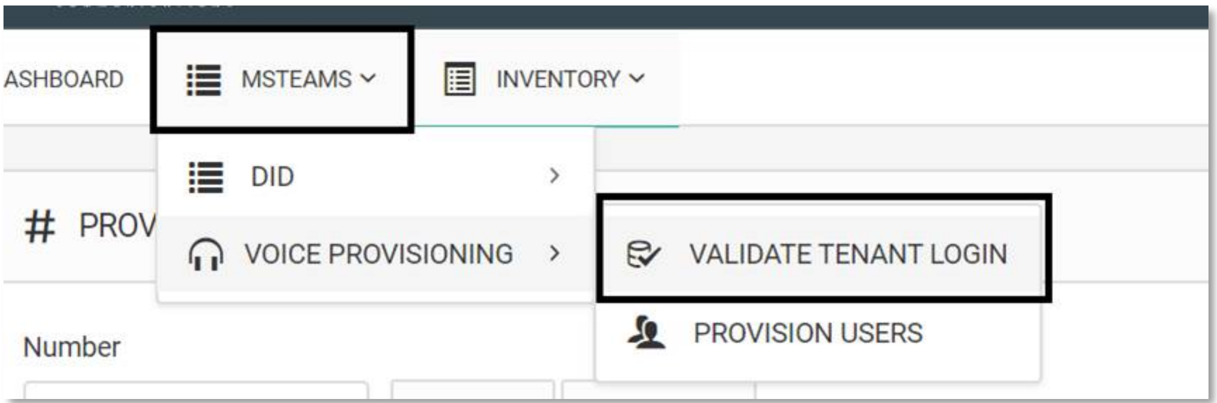
Call the number listed from a cell phone or other PSTN line. You should receive a prompt that there is an incoming call.

Then call out from the dialpad to an external number.

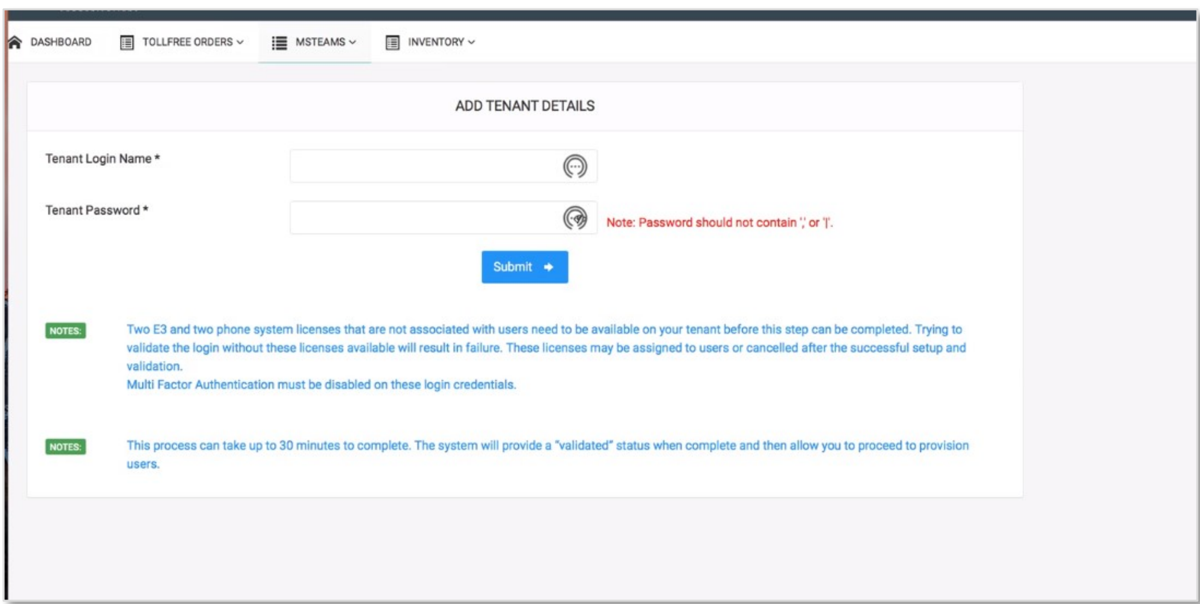
Appendix 1: Changing your Tenant Password in iPilot

1. Log into the Vconnect portal from https://vconnect.veracityteams.com/index.php/site/login

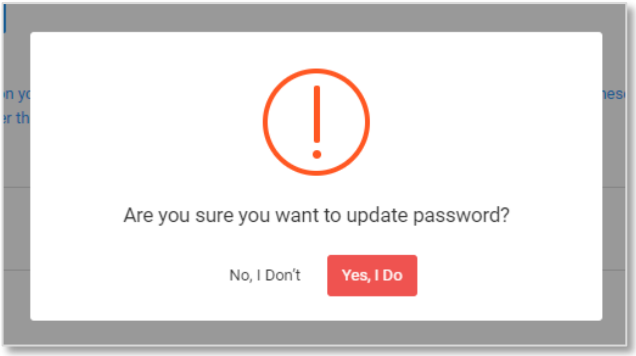
2. Once there, Select MSTEAMS->Voice Provisioning -> Validate Tenant Login



3. When you first arrive at this screen, it will look like this:



4. Click "Update Password"



5. Click "Yes, I do."

6. Enter your new username and password, and click "Submit"

7. The portal will revalidate your credentials, and your log in will now work using the updated credentials.

Appendix 2: Deprovisioning a Number from a User in Vconnect

To deprovision a number in the Vconnect portal, simple click the blue "X" under the action column to deprovision the number. This will return the number to the unprovisioned number pool, disabling DID calling for the account, and making the number available to be used with another user.