



HOW TO PLACE ORDERS AND UPGRADES

Fusion Connect Client Portal

Resources

Watch a Video:

[How To Place Orders And Upgrades](#)

More Resources:

See a complete list of Fusion Connect Client Portal self-support documents here:

<https://www.fusionconnect.com/support/portal-support>



How can I place an Order or Upgrade?

In the Orders and Disconnects tile, click the **+ New Order** button on the right.

The screenshot shows the Fusion Connect Client Portal dashboard. The 'Orders Disconnects' tile is highlighted with a red box, and a red arrow points to the '+ New Order' button. The dashboard includes sections for Sites, Billing, Services, and a right-hand navigation menu.

Sites

Total	Down	Alarm	Off	Inactive
1	0	0	0	0

Site	Account Number	City
		seattle

1 - 1 of 1
Manage > View all Sites >

Billing

Current Balance
\$0.00

Pay Bill

Manage Payment Methods > View Invoices >

Services

Internet (0)	Managed Network & Security (0)	Unified Communications (1)	IT Software & Services (0)	WiFi (0)
Equipment (5)	Phone Lines (0)			

Orders Disconnects

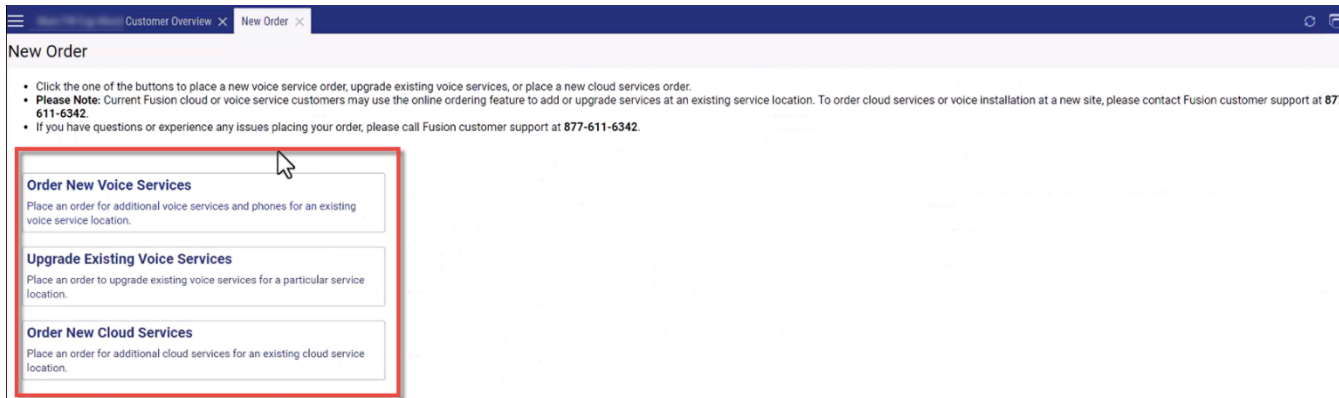
In Progress: 0
Completed: 3

+ New Order

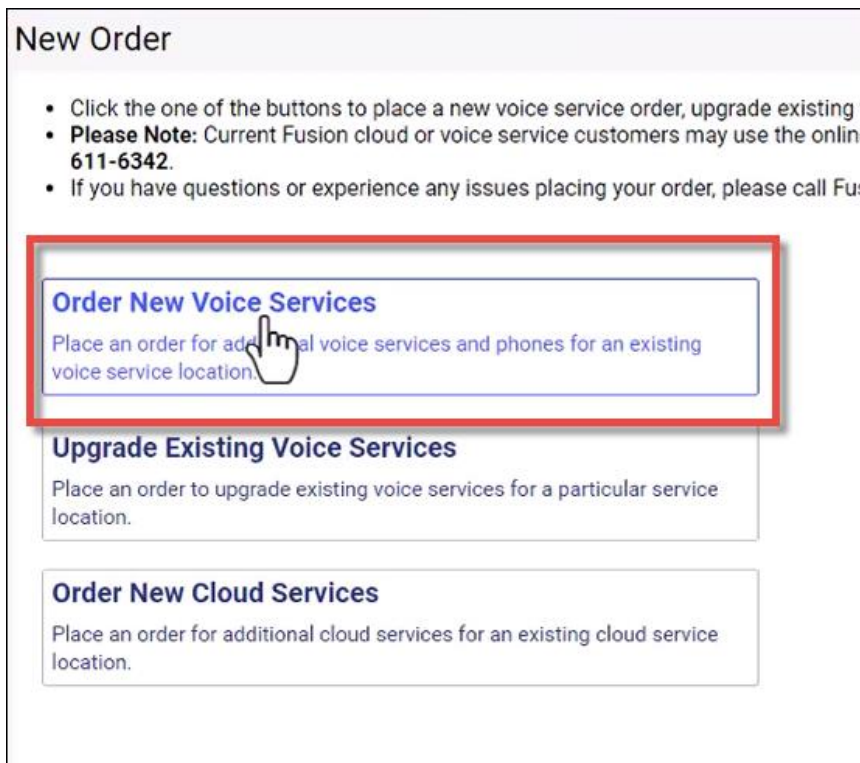
Quote Order Group	Site	Service
No Records Found		

View all Orders >

A new tab will open with a list of available options.



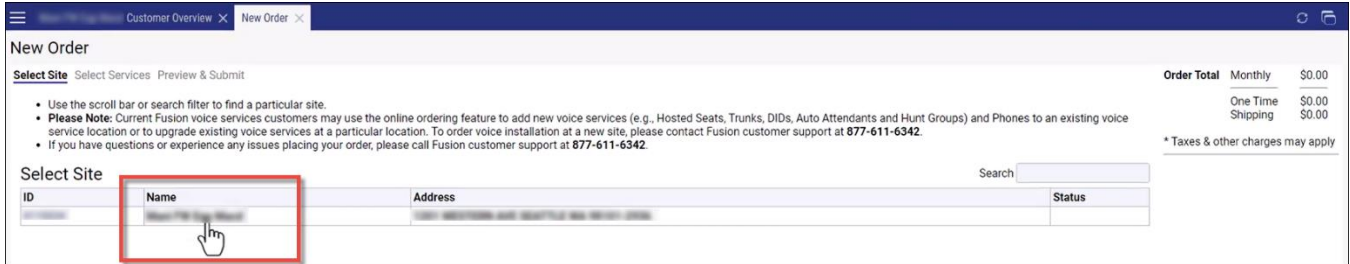
To place an order for additional voice services and phones for and existing voice service location, select **Order New Voice Services**.



You will see a list of your sites.

Note: Before ordering voice or cloud-based services, you will need to check the status of each site. If a site is in Pending status, this means there is an order in progress and another order cannot override that order until it is completed.

To order new service, click the **Name** of the Site that you want to add services to.



Next, you will see three options.

To **Add New: Hosted Seats & Lines**, you can search or scroll to find the service you want to add and select the quantity you want to add on the left.

The services are in alphabetical order.

When you have made a selection, you will see it added into your cart on the right.



When you have finished making your selections, click **Next** on the bottom.

New Order

Select Site **Select Services** Number Reservation Configure Services Preview & Submit

Add New: Hosted Seats & Lines Search

Quantity	Service Name	Cost/Unit (Monthly)	Cost/Unit (One-Time)	Total Cost (Monthly)	Total Cost (One-Time)
1	Hosted Voice Common Line Local (M)	\$12.95	\$0.00	\$12.95	\$0.00
3	Hosted Voice Employee Global (M)	\$26.95	\$0.00	\$80.85	\$0.00

Order Total Monthly \$93.80
One Time Shipping \$0.00 \$0.00

* Taxes & other charges may apply

Services

Hosted Seats & Lines

- (1) Hosted Voice Common Line Local (M)
- (3) Hosted Voice Employee Global (M)

Site

ID
Name
Address

Previous **Next**

Next, select all the details in your order.

For instance, if you chose to add seats, you will need to select numbers. Select the **State** and **Location** (Rate Center or Area) you would like the numbers to be assigned from.

Note: These are rate centers. If your city is not listed please select the rate center closest to the area you need.

New Order

Select Site Select Services **Number Reservation** Configure Services Preview & Submit

Local Numbers

You will need 2 new number(s) to use with your new services. Please select how these numbers are chosen.

I would like my numbers to be assigned from the following location:

State: North Carolina Location: ABERDEEN

Please Note: New numbers will be assigned. I will call you to confirm the numbers when we process your order.

I would like Fusion to select my numbers

I have a Special Number Request* and will receive from Fusion. (Please specify the request below)

*Please Note: Depending on the number availability, we may not be able to fulfill the Special Number Request. If we are unable to provide service, none does it affect the order.

ABERDEEN
ACME
AHOSKIN
ALBEMARLE
ALTON
ANDERSON
ANGIER
ANSONVILLE
APEX
ARDEN
ASHEBORO
ASHEVILLE
ATKINSON
ATLANTIC
AULANDER

Next, select if you would like Fusion to select numbers for you, or if you have a Special Number Request.

New Order

Select Site Select Services **Number Reservation** Configure Services Preview & Submit

Local Numbers

You will need 2 new number(s) to use with your new services. Please select how these numbers are chosen.

I would like my numbers to be assigned from the following location:

State: North Carolina Location CHARLOTTE

Please Note: New numbers will be assigned to your new services from CHARLOTTE, NC when we process your order.

I would like Fusion to select my numbers from the location selected above

I have a Special Number Request* and wish to specify which numbers I should receive from Fusion. (Please specify the request in the box below)

980-455

*Please Note: Depending on the number availability, Fusion may not be able to fulfill a Special Number Request. If we are unable to fulfill the request, we will assign numbers that are as close as possible to the requested numbers. Inability to fulfill the Special Number Request does not imply the inability to provide service, nor does it affect billing for service as per the service Terms and Conditions.

Next, you can build your seats. Fill in the First Name, Last Name, Extension (if desired), Email, Equipment and Payment Type for each seat.

New Order

Select Site Select Services Number Reservation **Configure Services** Preview & Submit

Order Total Monthly \$64.90
One Time \$0.00
Shipping \$0.00

- Please enter the following information required to configure your newly added services. Click **Done** to confirm your selections.
- Select from the equipment options for your newly added services that require it. If you intend to use your own equipment, please choose 'Customer Provided Equipment'.
- Use the scroll bar or search filter to find a particular service.
- Please Note:** Current Fusion voice services customers may use the online ordering feature to add new voice services (e.g., Hosted Seats, Trunks, DIDs, Auto Attendants, and Hunt Groups) and phones to an existing voice service location. To order voice installation at a new site, please call Fusion customer support at **877-611-6342**.
- If you experience any issues placing your order, please call Fusion customer support at **877-611-6342**.

Configure New: Hosted Seats & Lines

Search

Hosted Voice Employee National with Webex Premium (M)

First Name Last Name Phone Number Extension Email
John Doe New Number fisherwilliamj@aol.com

Equipment Payment Type
16 line phone, Color LCD:Yealink T46U Rent Price: \$8.00

Hosted Voice Employee National with Webex Standard (M)

First Name Last Name Phone Number Extension Email
Sara Jane New Number wfisher1972@gmail.com

Equipment Payment Type
Fusion WebEx Softphone Purchase Price: \$0.00

Services

Hosted Seats & Lines

Hosted Voice Employee
(1) National with Webex Premium (M)
Hosted Voice Employee
(1) National with Webex Standard (M)

Equipment

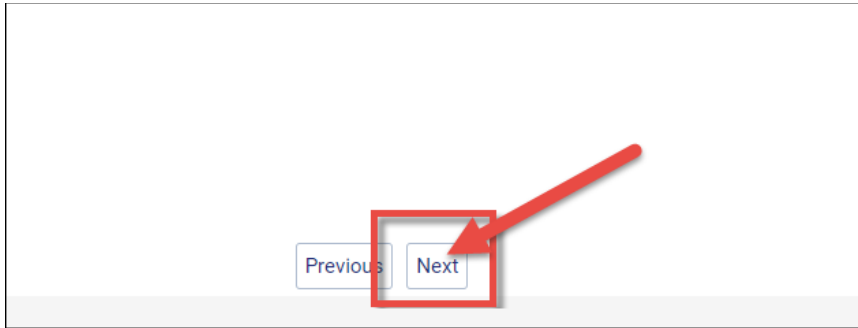
Purchased

(1) Fusion WebEx Softphone

Rented

(1) 16 line phone, Color LCD:Yealink T46U

Click **Next** at the bottom.



On the Preview & Submit page, you will see a recap of what you have selected on your order.

You can also fill in any Special Instructions and if you requested to add Equipment, you can select the Shipping Priority here.

Customer Overview x New Order x

New Order

Select Site | Select Services | Number Reservation | Configure Services | **Preview & Submit**

- Please review your order. To make edits, click on the 'Previous' button.
- If you experience any issues placing your order, please call Fusion customer support at 877-611-6342.

Site: [West 7th Street - 1201 West 7th Street, Suite 100, San Antonio, TX 78205](#)

Service Name	Qty	Total Monthly	Total One-Time
Add New: Hosted Seats & Lines			
Hosted Voice Employee National with Webex Premium (M)	1	\$34.95	\$0.00
Hosted Voice Employee National with Webex Standard (M)	1	\$21.95	\$0.00
Add New: Equipment			
16 line phone, Color LCD:Yealink T46U	1	\$8.00	\$0.00
Fusion WebEx Softphone	1	\$0.00	\$0.00

Special Instructions

Shipping Priority: **Ground - \$9.95/phone** (Selected)
 Ground - \$9.95/phone
 Next Day Air - \$34.95/phone

Please Note:
 • All hardware costs are taxable.
 • Order does not reflect the Regulatory Recovery surcharge or federally mandated usage fees and/or taxes.
 • **Credit Check:** Under certain circumstances online orders may be subjected to credit check. In such cases the order will be processed only upon credit approval. Credit check may take 1 to 2 business days.

Order Total (Monthly)	\$64.90
Order Total (One-Time)	\$0.00
Order Total (Shipping)	\$19.90

* Taxes & other charges may apply

Services

Hosted Seats & Lines

- (1) Hosted Voice Employee National with Webex Premium (M)
- (1) Hosted Voice Employee National with Webex Standard (M)

Equipment

Purchased

- (1) Fusion WebEx Softphone

Rented

- (1) 16 line phone, Color LCD:Yealink T46U

Site

ID: [1201 West 7th Street - 100](#)
 Name: [West 7th Street - 100](#)
 Address: [1201 West 7th Street, Suite 100, San Antonio, TX 78205](#)

Note: Make sure to read the Please Note: and Terms & Conditions sections.

When you have reviewed your order for accuracy and completed the **checkmarks** at the bottom, click the **Submit Order** button.

New Order

Select Site Select Services Number Reservation Configure Services **Preview & Submit**

Shipping Priority: Ground - \$9.95/phone

Please Note:

- All hardware costs are taxable.
- Order does not reflect the Regulatory Recovery Surcharge or federally mandated usage fees and/or taxes.
- Credit Check:** Under certain circumstances online orders may be subjected to credit check. In such cases the order will be processed only upon credit approval. Credit check may take 1 to 2 business days.

Order Total (Monthly) \$64.90
Order Total (One-Time) \$0.00
Order Total (Shipping) \$19.90

Terms & Conditions

- All fees for Services ordered on this Service Order shall be in addition to existing fees for Subscriber's previously ordered Services.
- The Service Term for Services ordered shall be coterminous with the initial voice service contract.
- Subscriber's order for Fusion Services are subject to the terms contained herein and to Fusion's Terms and Conditions, found at [Terms and Conditions](#).
- In addition to the fees quoted in this order, Subscriber understands that an early termination fee will be charged if Subscriber stops any Service before the end of its Circuit Term.
- Fusion will also provide certain optional Services, subject to payment of additional fees. The early termination fees, Optional Service fees and miscellaneous fees are set forth in Fusion's Fee Schedule, found at Fee Schedule and additional fees for voice services may be found at Additional Fees.
- Certain voice-related services (including use of 800 numbers) require the payment of additional fees. Subscriber agrees to pay all fees associated with the Services ordered and authorizes Fusion to charge Subscriber's credit card for such fees.
- This Service Order need only be executed by Subscriber. Fusion may accept or decline the Order as provided herein. Fusion's provisioning of the Service shall indicate its acceptance of the order.

Please read and accept the following before submitting the order:

- By placing this order, I agree that I am authorized to accept and submit the Service Order on behalf of Subscriber.
- By placing this order, I agree to bind Subscriber to all Terms, Conditions, and Fees that govern this Service Order.
- By placing this order, I acknowledge that I have been provided a summary of the Services to be ordered, as well as all applicable fees on the Order Submission page and agree that this summary is accurate.

Previous **Submit Order**

Order Total Monthly \$64.90
 One Time \$0.00
 Shipping \$19.90

* Taxes & other charges may apply

Services

Hosted Seats & Lines

(1) Hosted Voice Employee National with Webex Premium (M)
 (1) Hosted Voice Employee National with Webex Standard (M)

Equipment

Purchased

(1) Fusion WebEx Softphone

Rented

(1) 16 line phone, Color LCD:Yealink T46U

Site

ID
 Name
 Address

Note: Microsoft Teams licenses will not be active until the order is actually provisioned.

Once you submit the order, you will be emailed a confirmation of that order.

To place an order for cloud-based services, in the Orders and Disconnects tile, click the **+ New Order** button on the right.

Sites

Total 1 Down 0 Alarm 0 Off 0 Inactive 0

Site	Account Number	City
		seattle

1 - 1 of 1
 Manage > View all Sites >

Services

Internet (0) Managed Network & Security (0) Unified Communications (1) IT Software & Services (0) WiFi (0)
 Equipment (5) Phone Lines (0)

Billing

Current Balance \$0.00
 Pay Bill

Orders Disconnects

In Progress 0 Completed 3

+ New Order

Quote Order Group Site Service
 No Records Found

View all Orders >

A new tab will open with a list of available options. Select **Order New Cloud Services**.

More FW Edge Menu New Order


- Click the one of the buttons to place a new voice service order, upgrade existing voice services, or place a new cloud services order.
- Please Note:** Current Fusion cloud or voice service customers may use the online ordering feature to add or upgrade services at an existing location. Fusion customer support at **611-6342**.
- If you have questions or experience any issues placing your order, please call Fusion customer support at **877-611-6342**.

Order New Voice Services

Place an order for additional voice services and phones for an existing voice service location.

Upgrade Existing Voice Services

Place an order to upgrade existing voice services for a particular service location.

Order New Cloud Services 

Place an order for additional cloud services for an existing cloud service location.

Select the **Site** that you want to add cloud services to.

New Order

Select Site | [Select Services](#) | [Preview & Submit](#)

- Use the scroll bar or search filter to find a particular site.
- Please Note:** Current Fusion cloud services customers may use the online ordering feature to add new cloud services to an existing cloud service location. To order cloud services at a new site, please contact Fusion customer support at **877-611-6342**.
- If you have questions or experience any issues placing your order, please call Fusion customer support at **877-611-6342**.

Select Site Search

ID	Name	Address	Status
12345	Cloud New Service Location		

Then, you can select the **Quantity** of services needed and check your cart on the right for accuracy.

New Order

Select Site Select Services Preview & Submit

Add New: Cloud Services Search

Quantity	Service Name	Cost/Unit (Monthly)	Cost/Unit (One-Time)	Total Cost (Monthly)	Total Cost (One-Time)
1	Microsoft 365 E5	\$57.50	\$0.00	\$57.50	\$0.00

Order Total

Monthly	\$57.50
One Time	\$0.00
Shipping	\$0.00

* Taxes & other charges may apply

Services

Cloud Services

(1)	Microsoft 365 E5
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Site

ID	
Name	West New York Training
Address	

Click **Next** at the bottom.

Previous Next

On the Preview & Submit page, you will see a recap of what you have selected on your order.

You can also fill in any Special Instructions needed.

New Order

Select Site Select Services Preview & Submit

- Please review your order. To make edits, click on the 'Previous' button.
- If you experience any issues placing your order, please call Fusion customer support at 877-611-6342.

Site: West New York Training

Service Name	Qty	Total Monthly	Total One-Time
Add New: Cloud Services			
Microsoft 365 E5	1	\$57.50	\$0.00

Special Instructions

Note: Make sure to read the Please Note: and Terms & Conditions sections.

When you have reviewed your order for accuracy and completed the **checkmarks** at the bottom, click the **Submit Order** button.

New Order
 Select Site Select Services **Preview & Submit**

Please Note:

- All hardware costs are taxable.
- Order does not reflect the Regulatory Recovery Surcharge or federally mandated usage fees and/or taxes.
- Credit Check:** Under certain circumstances online orders may be subjected to credit check. In such cases the order will be processed only upon credit approval. Credit check may take 1 to 2 business days.

Order Total (Monthly) \$57.50
Order Total (One-Time) \$0.00
Order Total (Shipping) \$0.00

* Taxes & other charges may apply

Services

Cloud Services

(1) Microsoft 365 E5

Site

ID
 Name
 Address

Terms & Conditions

- All fees for Services ordered on this Service Order shall be in addition to existing fees for Subscriber's previously ordered Services.
- The Service Term for Services ordered shall be coterminous with the initial cloud service contract.
- Subscriber's order for Fusion Services are subject to the terms contained herein and to Fusion's Terms and Conditions, found at [Terms and Conditions](#).
- In addition to the fees quoted in this order, Subscriber understands that an early termination fee will be charged if Subscriber stops any Service before the end of its Circuit Term.
- Fusion will also provide certain optional Services, subject to payment of additional fees. The early termination fees, Optional Service fees and miscellaneous fees are set forth in Fusion's Fee Schedule, found at Fee Schedule and additional fees for voice services may be found at [Additional Fees](#).
- Subscriber agrees to pay all fees associated with the Services ordered and authorizes Fusion to charge Subscriber's credit card for such fees.
- This Service Order need only be executed by Subscriber. Fusion may accept or decline the Order as provided herein. Fusion's provisioning of the Service shall indicate its acceptance of the order.

Please read and accept the following before submitting the order:

By placing this order, I agree that I am authorized to accept and submit the Service Order on behalf of Subscriber.

By placing this order, I agree to bind Subscriber to all Terms, Conditions, and Fees that govern this Service Order.

By placing this order, I acknowledge that I have been provided a summary of the Services to be ordered, as well as all applicable fees on the Order Submission page and agree that this summary is accurate.

Previous **Submit Order**

You will see a message stating that your request is now in the hands of the provisioning team.

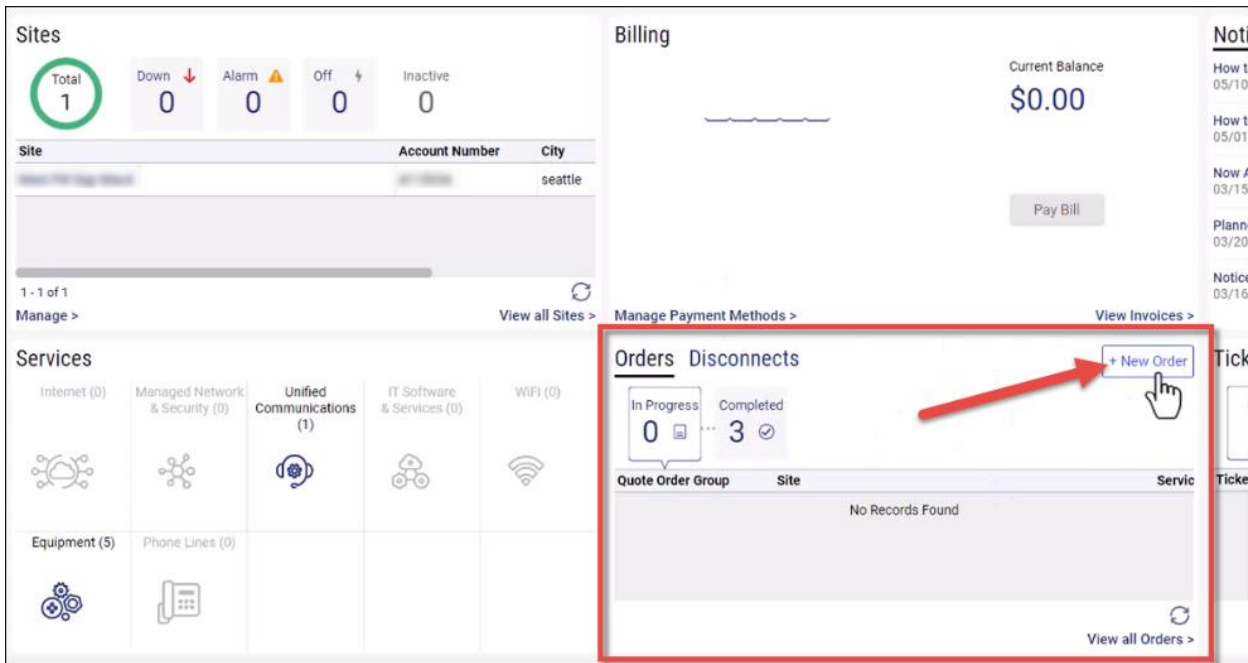
Note: Microsoft Teams licenses will not be active until the order is actually provisioned.

New Order

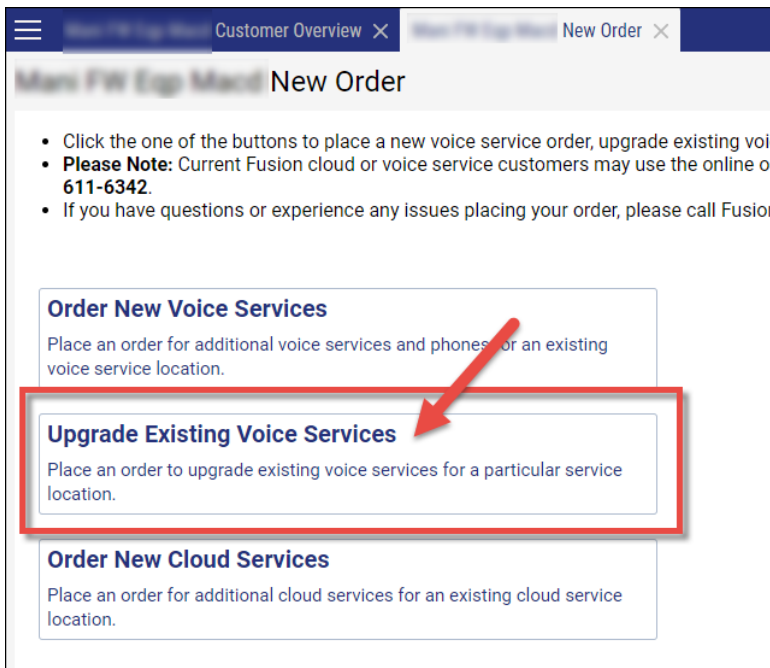
Thank you for your order! Your request is now in the hands of our provisioning team. To view your order details and status, please view the **Orders** section of the customer overview (orders will be visible after processing has started). If you need assistance, please call Fusion customer support at 877-611-6342.

Once you submit the order, you will be emailed a confirmation of that order.

To place an order to upgrade voice services, in the Orders and Disconnects tile, click the **+ New Order** button on the right.



A new tab will open with a list of available options. Select **Upgrade Existing Voice Services**.



Select the **Site** you want to upgrade.

Home > My Egg Model > New Order

Select Site | Select Services | Preview & Submit

- Use the scroll bar or search filter to find a particular site.
- Please Note:** Current Fusion voice services customers may use the online ordering feature to add new voice services (e.g., Hosted service location or to upgrade existing voice services at a particular location. To order voice installation at a new site, please contact installation at a new site, please contact Fusion customer support at **877-611-6342**.
- If you have questions or experience any issues placing your order, please call Fusion customer support at **877-611-6342**.

Select Site		
ID	Name	Address
123456789	Home Office	1234 Main Street, Seattle, WA 98101

Select your **Upgrade Options**.

Select Site | **Select Services** | Preview & Submit

- Select from the options given to upgrade your existing voice services.
- Use the scroll bar or search filter to find a particular service.
- Please Note:** You may use this online ordering feature only to add or upgrade voice services (e.g., Hosted Seats, Trunks, DIDs, Auto Attendants and Hunt Groups) to an existing voice service location. To order voice installation at a new site, please contact Fusion customer support at **877-611-6342**.
- If you have questions or experience any issues placing your order, please call Fusion customer support at **877-611-6342**.

Upgrade Existing: Hosted Seats & Lines

Search

Service Name	User Name	Phone Number	Extn	Cost/Unit (Monthly)	Upgrade Options	Total Cost (Monthly)	Total Cost (One-Time)
Hosted Voice Employee Global (M)	New Seat	+17 123456789	3754	\$26.95	<div style="border: 1px solid red; padding: 2px;"> Hosted Voice Receptionist Global (M) <ul style="list-style-type: none"> Select Service Hosted Voice Receptionist Global (M) Hosted Voice Receptionist Local (M) Hosted Voice Receptionist National (M) </div>	\$47.95	\$0.00

Fill in any **Special Instructions** needed and the **Local Contact Information** for this site.

Select Site | Select Services | **Preview & Submit**

- Please review your order. To make edits, click on the 'Previous' button.
- If you experience any issues placing your order, please call Fusion customer support at **877-611-6342**.

Site: Home Office

Service Name	Qty	Total Monthly	Total One-Time
Add New: Hosted Seats & Lines			
Hosted Voice Receptionist Global (M)	1	\$47.95	\$0.00

Special Instructions

Local Contact Information

Name

Email

Phone

Extension

Note: Make sure to read the Please Note: and Terms & Conditions sections.

When you have reviewed your order for accuracy, click the **Submit Order** button.

Microsoft Edge Microsoft New Order

Select Site Select Services **Preview & Submit**

Local Contact Information

Name

Email

Phone

Extension

Please Note:

- All hardware costs are taxable.
- Order does not reflect the Regulatory Recovery Surcharge or federally mandated usage fees and/or taxes.
- Credit Check:** Under certain circumstances online orders may be subjected to credit check. In such cases the order will be processed only upon credit approval. Credit check may take 1 to 2 business days.

Terms & Conditions

By clicking "Submit Order", Customer is ordering the Services described on the Order Submission page and agrees to pay the fees associated therewith. All fees for Services ordered using the Fusion Connect Customer Portal shall be in addition to existing fees for Customer's previously ordered Services. Customer's use of the Services are subject to the terms of the Master Service Agreement between Fusion Connect and Customer, or, in the absence of such agreement, Fusion Connect's Basic Terms and Conditions found at <http://www.fusionconnect.com/legal>, including the Tariff(s) and/or Service Addendum(s) applicable to the Services described in this Online Order. Failure to adhere to these terms may result in delays in your Service installation, interruption, and/or complete loss of Service, and additional charges. Fusion Connect's Fees and Surcharges Guide found at <http://www.fusionconnect.com/legal> contains the optional and miscellaneous Service fees associated with Fusion Connect Services and is hereby incorporated into this Online Order. If Customer is ordering Microsoft Services, Customer acknowledges that Fusion Connect may seek association to Customer's Tenant ID as part of the Microsoft Partner Incentives program and that Microsoft may share Customer subscription information with Fusion Connect. You represent that you are authorized to accept this Service Order on the terms set forth herein on behalf of Customer.

Order Total (Monthly)	\$47.95
Order Total (One-Time)	\$0.00
Order Total (Shipping)	\$0.00

Order Total Monthly \$47.95

One Time \$0.00

Shipping \$0.00

* Taxes & other charges may apply

Services

Hosted Seats & Lines

(1) Hosted Voice Receptionist Global (M)

Site

ID

Name Microsoft Edge Microsoft

Address

Previous **Submit Order**