How to Use Guide: Bulk Account Maintenance

Last updated: 1/29/2013

Overview

Bulk Account Maintenance allows you to use a file upload process to make multiple Account Maintenance changes within a single spreadsheet. This feature enables you to complete the following account maintenance transactions for multiple wireless users at a time:

- New Service Activation
- New Activation and Keep Your Number (Port In)
- Plan Change
- Add / Remove Feature
- Other Maintenance Transactions
- Upload User Information

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General Information

Spreadsheet Requirements

It's important to format the spreadsheet prior to submission for the file to process successfully. Below are some important points for formatting.

- Don't delete any row above the column headers on the spreadsheet.
  - Don't delete rows 1 through 10
- For each spreadsheet, the user must identify which rows on the spreadsheet should be processed
  - For each transaction please use the Mapping File and reference the tab for the transaction you're completing to help you identify which columns must be filled and the accepted format for each.
- Each spreadsheet must be formatted as follows prior to upload:
  - File name must not contain special characters or spaces
  - File name must only contain the following
    - a-z or A-Z
   - 0-9
    - Hyphen or underscore

Notes:

- The file name can't include spaces.

- Except for "Mass Upload" in Verizon Enterprise Center, all Bulk Account Maintenance templates must be saved as (.XLS)—Microsoft Excel 97-2003 format.

Accessing the Bulk Account Maintenance Page

From My Business Account, hover your mouse over the Account Maintenance tab and click **Bulk Account Maintenance**.
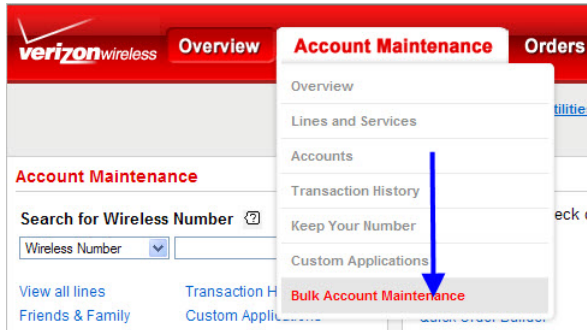
User Role Info

Bulk Account Maintenance is available to those user roles with "default" access to your company's billing accounts:

- Primary Contact (MYPOC)
- Administrator
- Analyst
- Maintain
- Maintain & Pay

How To's

New Service Activations/New Activation & Keep Your Number

Use *New Activation & Keep Your Number* when you need to bring an existing wireless number from another wireless carrier to Verizon Wireless (also known as "port-in"). Otherwise, New Service Activations is sufficient for most activation attempts.

First time user checklist for New Service Activation/New Activation & Keep Your Number:
When attempting to complete bulk activation online, we recommend working with your account support team. Here is a checklist of what you should complete prior to your first order:

- Are you working with a current template?

- Are all the device IDs approved by Verizon Wireless?

- Are any device IDs already active? (If so, remove them from the spreadsheet.)

- Are all required fields populated on the spreadsheet?

- Does the Billing Info field(s) match the billing information on file?

- Are there any spaces in the IP Feature fields? (No empty spaces in these fields)

- Was the spreadsheet saved locally as .XLS (Excel 97-2003) file before uploading?

- Does the contract term match your agreement with Verizon Wireless?

Note: These two options are not enabled by default. A customization request form must be submitted by your assigned Business Sales Associate.

Check either radio button and click **Continue**.

"New Service Activations" will display the following screen and two options to complete your changes:

- **Option 1** is interactive, and allows you to move through all of the activation steps online.

- **Option 2** allows you to upload all of your data, such as device ID, price plan, features, etc., into an Excel® file.

Option 1

1. For new-service activations using Option 1, select **Option 1: Interactive Process**, and then click **Continue**.


2. Enter the device IDs. If needed, enter the 4G SIM number.

Notes:

- Some 4G devices have SIM cards physically "embedded" in them, and they don't need to be entered in this step. If you're unsure about this, check with your Verizon Support Team before proceeding.

- If entering device IDs onscreen, you can activate up to 25 devices. If using Option 2 (upload), you can activate up to 500 devices.

- You don't need to enter 3G SIM IDs for 3G equipment types. Devices must be of the same device type. An error message will appear if you attempt to activate a mix of device types.

3. After you have entered the device information, click **Continue**.

4. The system will automatically evaluate the information you have entered—either one at a time if you enter them manually, or simultaneously if you have uploaded your information via the spreadsheet. The progress bar will indicate the current status.
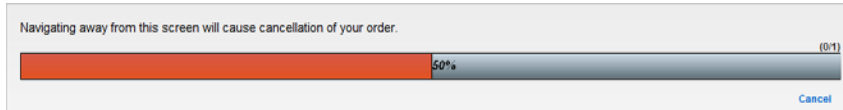
Note: You can cancel this step if needed. If you click **Cancel**, the entire order will be canceled and must be resubmitted.

5. When the system validation is complete, you can evaluate the errors, if any are detected. Use "Go Back" to correct any invalid device IDs. If you have numerous errors, you can download a file for easier review.
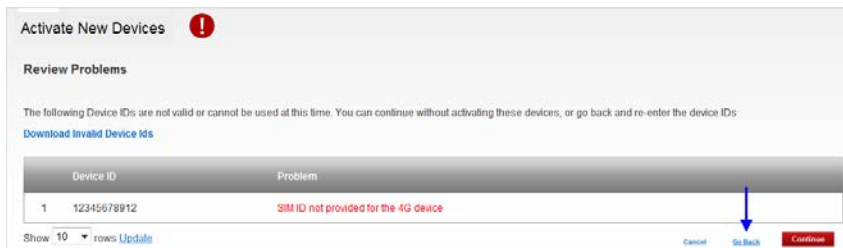
6. If you prefer to proceed with the device IDs that did pass validation, click **Continue**.

7. Begin to make your plan selections. The first step on this page is to choose to add your new activations to an existing account, or create a brand new account. To do so, enter the existing account number or use the search option to locate the information.
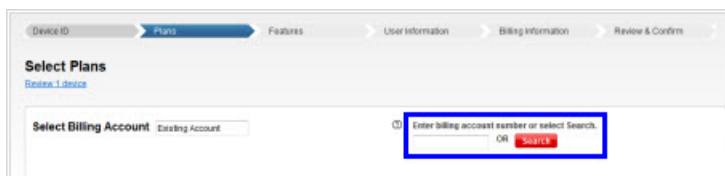
8. Once the Billing Account information is entered, select from the Plan, Text and Data options. These selections will apply to *all* of the devices you're activating. You'll only go through this step once.

Note: Select service options that are consistent with device functionality. Selecting a plan, text, data or feature option not consistent with device functionality may cause the order to fail. If you're unsure about this, contact your Verizon Wireless Support Team.

9. Once all of the required selections have been made, click **Continue**.

10. Select any required and optional features for all of the lines. Click **Continue**.

11. On the User Information page, enter the user information for *each* device to be activated. User information can be uploaded using a spreadsheet, or it can be entered manually on this page. Required fields are indicated, and all fields must be complete before you can move to the next page of devices (if applicable).

Note: You can save some time by copying the information you entered and applying it to the next user, if applicable.

12. On the Review and Confirm page, ensure all of the information is accurate. You can make edits and remove any devices at this point. When ready, click **Submit**.

13. You order has been submitted. You'll be brought back to the Bulk Account Maintenance page, where you can check the status of your activation by clicking **View Bulk Activation Status**.
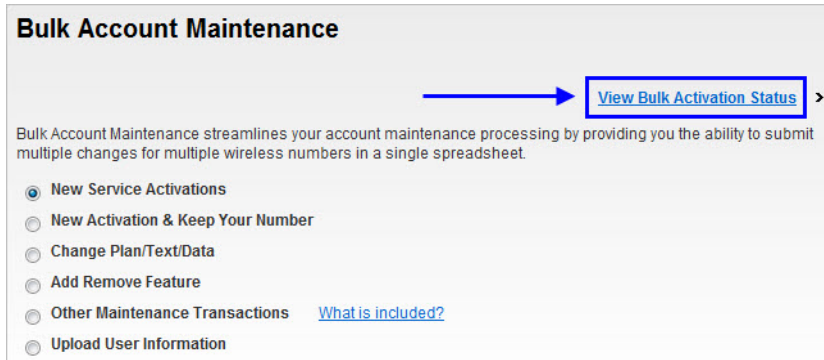
Option 2

1. Within Option 2: In the Upload Process section, click **Download New Service Activation Template**.
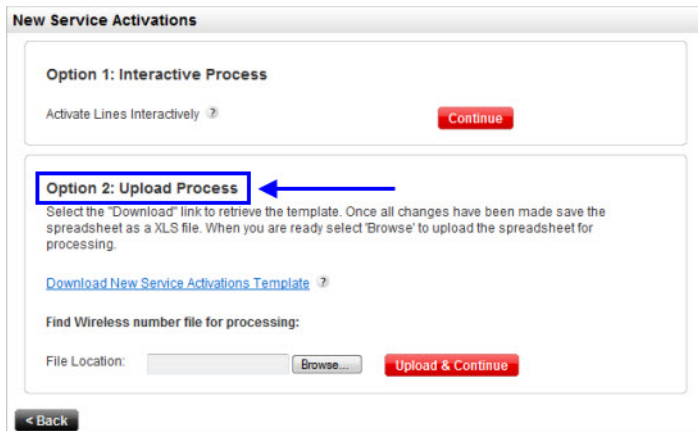
2. Make the necessary New Activation and Keep Your Number updates to the spreadsheet. Refer to the mapping guide and the tab for New Activation and Keep Your Number for details on which columns must be filled and the formatting rules for each. If you have loaded price plans and features on your profile, they will pre-populate at the top of the spreadsheet for your new activation and keep your number updates.

Note: It is important that you are familiar with your price plan codes and the associated features that coincide with the price plan you choose. There is no description provided on the spreadsheet for the price plans and feature codes.

3. Once you have completed the necessary columns as indicated in the mapping guide, save the spreadsheet to a convenient location.

Notes:

- When naming the file, make sure you use only characters listed below:

  - A – Z
  - a-z
  - 0 – 9
  - _ (underscore)
  - - (dash)

- Do not use spaces in the file name. The file cannot exceed 4MB in size.

- If you copy and paste into your spreadsheet, ensure you're pasting text only and not formatted text, such as HTML or Rich Text.

4. Once your file is saved, close your spreadsheet and return to the transaction screen. Click **Browse** to locate the .XLS file you just saved for your New Activation and Keep Your Number/New Service Activations request.

5. Once you have located your file, double click on the file name. The file will populate within the File Location field. Select **Upload & Continue**.

6. If the file is formatted correctly and uploads successfully you will receive a confirmation screen and confirmation number for your records.

Bulk Account Maintenance Confirmation

Your Confirmation Number: MB20558495

Your transaction has been submitted for processing. The processing time will vary based on the file size. The larger the file the longer the upload processing will take. Once the system has processed all records on the uploaded spreadsheet, you can view the details of the upload in Transaction History.

Note: If you have chosen to reset password, the default will be last 4 digits of the Wireless Number

Transaction History

Note: You can check the status of your bulk activation request by clicking on the **View Activation Status** link on the Bulk Account Maintenance page.
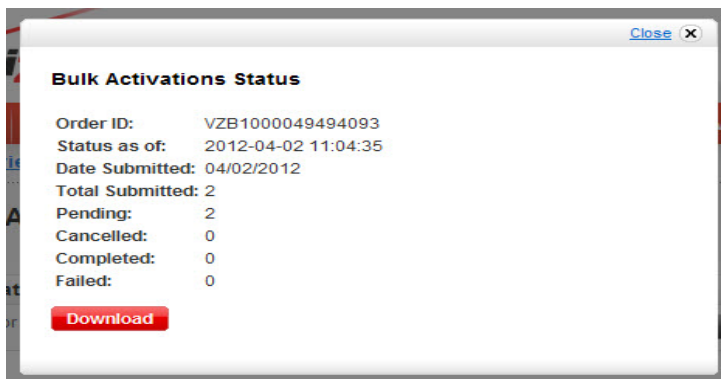

Bulk Account Maintenance

‹ Machine to Machine Management Center   View Bulk Activation Status ›

Bulk Account Maintenance streamlines your account maintenance processing by providing you the ability to submit multiple changes for multiple wireless numbers in a single spreadsheet.

- ● New Service Activations
- ○ New Activation & Keep Your Number
- ○ Change Plan/Text/Data
- ○ Add Remove Feature
- ○ Other Maintenance Transactions   What is included?

7. On the Bulk Activation Status page, click the **Order ID** hyperlink to view detailed information, or use the Search option to narrow down your results by Order ID, Date Submitted, Status or User ID.

Bulk Activations Status

Information is available for up to 30 days.

Search for   Order ID   [   ]   Search   Reset Filter

Date Submitted	Order Id	Status	Order Type	User Id
04/03/2012	VZB1000049494776	Processing	New Service Only	
03/28/2012	VZB1000049490760	Processing	New Service Only	
03/28/2012	VZB1000049490749	Failed	New Service Only	
03/28/2012	VZB1000049490721	Failed	New Service Only	
03/28/2012	VZB1000049490544	Failed	New Service Only	

Note: Initially, the Order ID will not be a hyperlink. After a period of time (depending on the size of the upload), the Order ID number will change to a hyperlink.

8. A pop-up window will display details on the status of the activations.

Close ✖

Bulk Activations Status

Order ID: VZB1000049494093
Status as of: 2012-04-02 11:04:35
Date Submitted: 04/02/2012
Total Submitted: 2
Pending: 2
Cancelled: 0
Completed: 0
Failed: 0

Download

Note: This window will display activation status based on current processing. To update the information, close the window and click the order ID to refresh the contents.

9. Click the **Download** button to retrieve a spreadsheet of activated devices, without waiting for the order to fully complete. Like the status pop-up, the spreadsheet contents reflect current processing. The file content will change as devices are activated. Devices that have been activated will have a wireless number; devices that have not been activated will display "pending" in the wireless number column.

Change Plan/Text/Data

Change Plan/Text/Data will display the following screen and two options to complete your changes:

Note: The first mobile number input within the field will populate once you hit **Continue** and land on the Calling Plan Change page. The system will reference this number for price plan and feature compatibility and will drive ALL of the changes for the rest of the numbers on your request. If the rest of the mobile numbers entered are not compatible with the new price plan and feature selected, the order will fail.

Option 1: You can manually enter the wireless numbers within the fields when completing a change for up to five numbers. Below are the steps:

1. Select Change Plan/Text/Data from the Bulk Account Maintenance Options.

2. Check the Agree to the Terms & Conditions pop-up box and select **Continue**.

3. Select the radio button and input the wireless numbers you would like to change within the available boxes, then click **Continue**.

4. Next you will be brought through selecting the plan, selecting the features, reviewing the new plan and confirming the changes.

Notes:

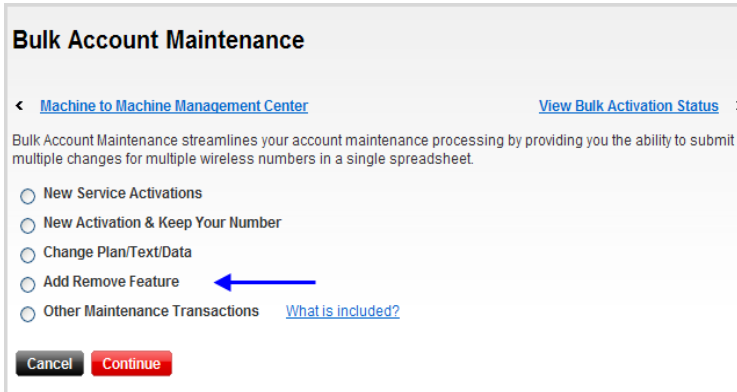- To complete a plan change, all numbers must be eligible for the selected plan/feature you are changing to. Device types *must* match the plan/features you request. **The first number within your request will drive the changes for *all* of the numbers selected for the plan change**. You will only be brought through the plan and feature selection *once,* even if you requested to change multiple numbers.

- Once the request has been submitted, you will be brought to a confirmation page that includes a confirmation number for your records. You can check details on the status of your order by searching with the confirmation number and Last Name of the requestor under Transaction History.

Bulk Account Maintenance Confirmation

Your Confirmation Number: MB20558495

Your transaction has been submitted for processing. The processing time will vary based on the file size. The larger the file the longer the upload processing will take. Once the system has processed all records on the uploaded spreadsheet, you can view the details of the upload in Transaction History.

Note: If you have chosen to reset password, the default will be last 4 digits of the Wireless Number

Transaction History

Option 2: Change Plan/Text/Data for more than five lines can be completed via the spreadsheet.

Change Plan/Text/Data

Enter up to five wireless numbers to complete a change to plan/text/data (number format: xxx-xxx-xxxx):

Option 1

Continue

Option 2

Download the Change Plan/Text/Data template to complete five or more changes to plan/text/data.

Download Change Plan/Text/Data Template ?

Find Wireless number file for processing:

File Location: [   ] Browse... **Upload & Continue**

The following steps will walk you through Change Plan/Text/Data for more than five numbers:

1. Select **Change Plan/Text/Data** from the Bulk Account Maintenance Options.

Bulk Account Maintenance

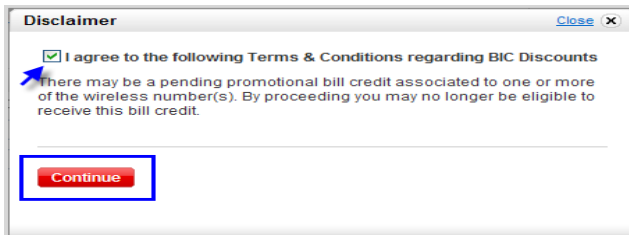< Machine to Machine Management Center   View Bulk Activation Status >

Bulk Account Maintenance streamlines your account maintenance processing by providing you the ability to submit multiple changes for multiple wireless numbers in a single spreadsheet.

○ New Service Activations
○ New Activation & Keep Your Number
○ Change Plan/Text/Data ←
○ Add Remove Feature
○ Other Maintenance Transactions   What is included?

Cancel   Continue

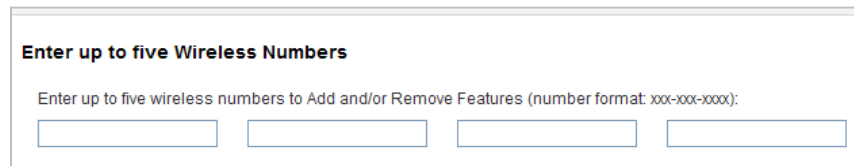2. Agree to the Terms & Conditions pop up box and select **Continue**.
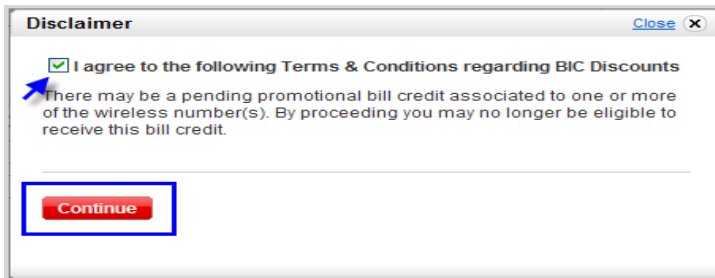
3. Select the radio button and click the blue link: Download Change Plan/Text/Data Template.
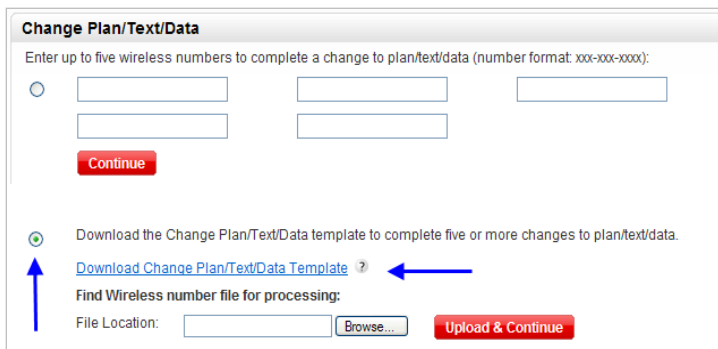
4. Download the spreadsheet; indicate a request to change the plan by using an **X** in the Update Information column next to the mobile number (see below).

Note: Do not delete rows 1-10 of the spreadsheet.

5. Save your file to a convenient location. Remember not to use characters or spaces within your file name when saving.

Note: Your file size cannot exceed 4 MB, and must be XLS in format (Excel 97-2003).

6. Once your file is saved, close your spreadsheet and return to the transaction screen. Click **Browse** to locate the file you just saved for your Calling Plan Change request.

7. Once you have located your file, double click on the file name. The file will populate within the File Location field. Click **Upload & Continue**.

8. Now select the plan and features that you want all of the numbers on your spreadsheet to be changed to.

Notes:

- When you complete a calling-plan change, all numbers must be eligible for the selected plan/feature you are changing to. Device types must match the plan/features you request. **You will only be prompted to select the plan for the *first line* on your request. ALL of the numbers on the spreadsheet will follow the same changes you select for the first number**.

- Once you have submitted your selected price plan and feature changes, you will receive a confirmation screen and confirmation number for your records. You can check details on the status of the spreadsheet by searching with the confirmation number and Last Name of the requestor under Transaction History.

Add / Remove Features

The Add/Remove Features will display the following screen and options:

1. Select Add/Remove Feature from the Bulk Account Maintenance Options.

2. Check the Agree to the Terms & Conditions pop-up box and select **Continue**.

3. You have three choices to identify the numbers you would like to update:

    a. Manually input up to five numbers and click **Continue**. If using this method, input the numbers to update and continue to Step 9.

    b. Upload a list of wireless numbers via spreadsheet. If using this method, indicate your changes next to the numbers with an **X**. Format and upload your spreadsheet and continue to Step 9.

c. Use the Account Search to display a list of mobile numbers.

Account Search

Select an account to search wireless numbers

| Select an Account ▼ | **Search** |

Extended Search Option
Extended Search allows you to identify wireless numbers using a specific criteria

4. For this example, we will select the Account Search method. Select the Account number from the dropdown menu and click **Search**.

Account Search

Select an account to search wireless numbers

| 62██████-00001 ▼ | **Search** |

5. A list of mobile numbers associated with the account selected will display. Check the box next to the numbers for which you would like to update the features.

Account Search

Select an account to search wireless numbers

| 62████-00001 ▼ | **Search** |

Extended Search Option
Extended Search allows you to identify wireless numbers using a specific criteria

Search Results

☐ Number	User Name	Status	Upgrade Eligibility
☑ 20_____	JAKE	Active	06/13/2013
☐ 210_____	JAKE	Active	06/28/2013
☐ 2102_____	JAKE	Active	06/28/2013

6. If you aren't familiar with the features for the numbers displayed, use the Extended Search Option to identify numbers based on specific criteria.

Account Search

Select an account to search wireless numbers

| 62_____-00001 ▼ | **Search** |

Extended Search Option ←
Extended Search allows you to identify wireless numbers using a specific criteria

7. A pop-up window will display, allowing you to extend your search options based on Contract, Features, Cost Center, etc. Use the + button to expand your search options.
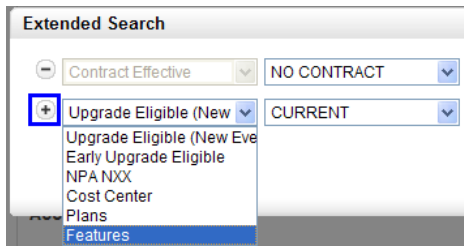
8. When ready, click **Search**.
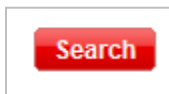
9. A list of numbers will display, showing only the numbers that match your expanded search criteria. Check the boxes next to the numbers you would like to update.
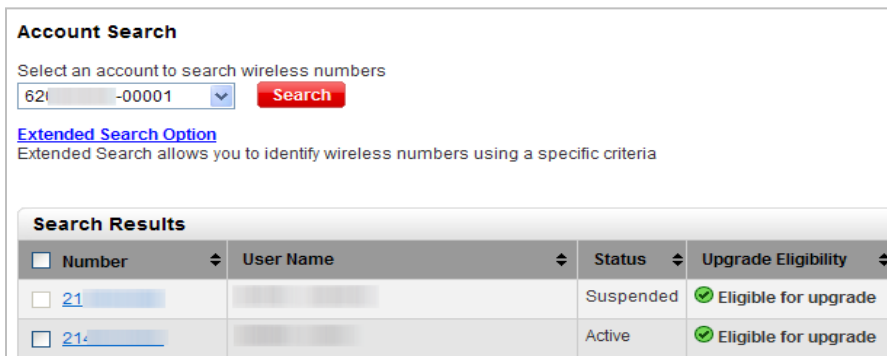

Note: You cannot select a suspended line.

10. Next, you will be brought to a page that displays your current features and a list of features you can remove and/or add. Uncheck a box to remove an active feature or check a box to add a new feature. Select the items you would like to add and/or remove, review your selections and confirm your changes:

Note: All numbers you selected will follow the changes on this page; it will only be displayed once.

11. When ready, click **Continue**.
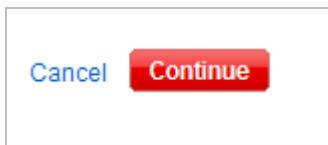
12. A summary of your changes will display. This shows the amount of lines being updated and the features you are adding or removing.

13. Select an effective date for your changes and click Submit.

Note: Once you have confirmed all feature changes and submitted, a screen will display with a confirmation number for your records. You can check details on the status of your request by searching with the confirmation number and last name of the requestor under Transaction History.

Other Account Maintenance Transactions

Other Account Maintenance Transactions allow you to change user information, activate equipment (on existing service), suspend service, resume service and reset voicemail password.

Note: Voicemail passwords will auto reset to 1+ the last four digits of the phone number. You cannot select a custom password. You can make multiple changes to one mobile number within this transaction spreadsheet (you will receive an email confirming which transactions were successful and which failed). The Primary Contact, Admin and Analyst can request access to update the Static IP and EHA Pool only via a customization request. Contact your support team for assistance.

The following steps will walk you through **Other Maintenance Transactions.**

1. Select **Other Maintenance Transactions** from the Bulk Account Maintenance Options.
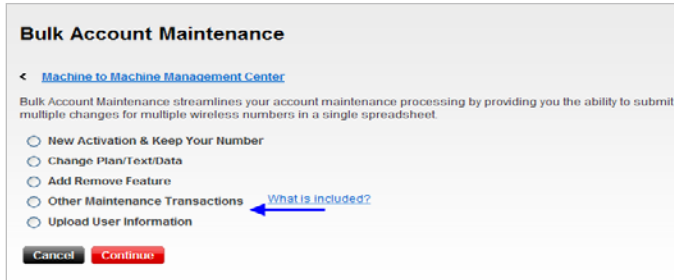
2. Within this section, you have two options and files to download. If you would like to complete changes to the account level, you would select Option 1. If you are completing changes to specific mobile numbers, select Option 2.
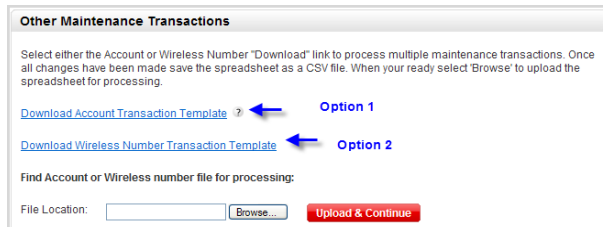
Download the file that suits your changes by clicking on the blue link. For example: Account level changes would be appropriate if you are looking to update an address that applies to the account as a whole. If you are looking to update mobile-number information unique to a user, such as name or address, you would select the mobile number file. For this example, we will follow a Wireless Number Template.

3. The file will open with several pre-populated fields. The name, address and current device ID are displayed.

4. Indicate the changes requested by placing an **X** in the Update Information column to indicate which user/number you want to update. Next, select the transaction(s) you want to change (i.e., suspend service, change voicemail password). For more information on what columns must be filled out, please refer to the mapping guide and the tab that corresponds to the transaction you are completing.

Note: There are four tabs in this Excel mapping file that relate to this transaction.

Tip: If you are suspending a line of service, you *must* select one from each of these, the reason for suspension *and* the suspend-billing options:

     i.   Suspend Lost/Stolen *or* Suspend Seasonal/Vacation

     ii. Suspend with billing *or* Suspend without billing

5.   Save your file to a convenient location. Remember not to use characters or spaces within your file name, and save this file as XLS (Excel 97-2003).

Note: Your file size cannot exceed 4MB.

6.   Once your file is saved, close your spreadsheet and return to the transaction screen. Click **Browse** to locate the CSV file you just saved for your Calling Plan Change request.

7.   Once you have located your file, double click on the file name. The file will populate within the File Location field. Select **Upload & Continue**.

Note: If the file is formatted correctly and uploads successfully, you will receive a confirmation screen and confirmation number for your records. You can check details on the status of the spreadsheet by searching with the confirmation number and last name of the requestor under Transaction History.