



## ecQX Portal – Reseller Guide

**Abstract:** This guide explains how to use the ecQX portal to purchase, configure and use the Epygi cloud services.

## Document Revision History

Revision	Date	Description
1.0	08-Dec-17	Initial Release
1.1	24-Jan-18	Described how to activate free trial for 30 days.
1.2	10-Jun-19	Updated
1.3	12-Nov-19	Updates regarding promotions, U.S. Resale Certificate and ecQX trials.
1.4	08-Nov-21	Updated
1.5	18-Mar-22	Updated
1.6	04-Oct-22	Updated
1.7	24-Jul-24	Updated

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## 1 Introduction

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The Epygi cloud QX (ecQX) portal ([www.epygicloud.com](http://www.epygicloud.com)) is accessible via a WEB browser and allows the Epygi QX cloud services to be easily ordered, purchased, configured and managed online. This guide describes in detail how to use the ecQX portal by resellers and end users.

The following services and features are available for resellers to order, purchase and configure through the ecQX portal. As for the capacity, limitations and prices concerning the mentioned services and features see the Cloud PBX section in the Epygi ecQX portal ([www.epygicloud.com](http://www.epygicloud.com)).

## 2 Epygi Cloud QX Services

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- ecQX – is a virtual PBX instance running in the cloud including a number of extensions (IP phone ports or IP phone extensions; these terms may be used throughout this document interchangeably) in basic configuration. Additionally, the ecQX basic configuration includes a number of Audio Conference ports and eQall softphones.
- IP Phone Extension – this service adds new extensions to the ecQX for additional IP phones. The maximum number of extensions on the ecQX is 3000.
- SMS/WhatsApp - allow to send/receive SMS/WhatsApp messages from/to eQall.
- VM Transcription - allow converting voicemails to text before sending voicemail notifications to users' email addresses. The transcription can be sent with or without a voicemail attachment, depending on the extension's Voice Mail Settings.
- eQall Softphone – this service adds additional eQall softphones.
- eQall Receptionist console – this service adds support for graphical user interface on the eQall windows to watch the status of selected extensions on the ecQX.
- Call Recording – activates a call recording port on the ecQX. One port allows recording of one call. To record more calls simultaneously activate more Call Recording ports. The maximum number of Call Recording ports on the ecQX is 152.
- Audio Conference – opens one additional audio conference port on the ecQX. The port count is independent of the number of conference rooms. You can have several conference rooms, but the maximum number of simultaneous participants in all rooms cannot exceed the total number of ports. The maximum number of the ports on the ecQX is 300.
- CRM integration – allow user to automatically view, create and update the information for CRM contacts upon receiving calls from customers on the ecQX. When activated, the per-seat license will provide connection and integration with Salesforce, Vtiger and ZOHO CRMs.
- Call Center – The Call Center Bundle includes the following services:
  - Automatic Call Distribution (ACD) – for distributing inbound calls to the agents in the ACD queue.
  - Barge-In – for ACD supervisors to interact with agents in active calls.
  - Epygi ACD Console (EAC) – for ACD queue agents and supervisors to monitor and control call center functionality.

The bundle provides one port for connecting to the EAC. If you need to connect more ports to the EAC, an equivalent number of Call Center bundles should be ordered.

## 3 Epygi Cloud Monitoring Service

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Epygi Cloud Monitoring service (ecMON) is a cloud-based monitoring solution for Epygi products, namely the cloud-based ecQXs, on-prem QX/UC IP PBXs and QX Gateways (henceforth QX). This service designed for resellers and distributors, provides effective monitoring and control of these devices in a centralized directory with some key configuration settings and performance parameters. ecMON furnishes real-time event and status notifications and allows remote web access to QX devices, as well, as the IP phones located within the same network as the QX.

**ecMON** is a web-based service designed to provide the following functions to Epygi resellers:

- Show all monitored QXs in a centralized directory.
- Show the key configuration settings of QXs, such as the name of the instance, owner, active feature licenses, used price plan including activation/deactivation time, host address, FW version, uptime/downtime duration.
- Shows device information, such as the CPU utilization and the number of simultaneous calls on QXs for the specified period, active licenses, number of registered phones.
- Receives real-time notifications for system events that may affect the quality of services running on the QX, helping to identify and to resolve issues on the QX. Allows to display of over 70 system events regarding the services running on the QXs.
- Supports remote login access to QX devices through the ecMON application. By virtue of creating a secure tunnel between the QX and ecMON, it will allow remote access to QX units and the phones connected to units even behind a NAT/firewall.
- Uploads the selected firmware file and install it on the selected devices, or groups of devices at once.
- Automatic configuration backup
- Upload the selected configuration backup file and restore it on the selected devices, or groups of devices at once.
- Uploads the selected music on hold and universal extension recording to the selected devices or groups of devices
- Notifies the QX device owner via email and phone calls when device is unreachable.
- Creates or edits the configuration of any QX via Configuration Editor, which emulates QX's graphical user interface.
- Shows the QX location on the map

The following options for ecMON purchase are available currently:

- ecMON 1-5 - Epygi Cloud Monitoring Service (from 1-5 devices/instances)
- ecMON 6-9 - Epygi Cloud Monitoring Service (from 6-9 devices/instances)
- ecMON 10+ -Epygi Cloud Monitoring Service (10 devices/instances and more)

## 4 eQall – Epygi Softphone

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eQall is Epygi's softphone available for MS Windows and for mobile devices using Android and iOS. It can be installed on a PC, a laptop or a desktop, and a smartphone and will use the internet for making, receiving and transferring VoIP calls. eQall functions much the same way as any Epygi supported full-featured desk phone would.

eQall is designed to be used with QX/UC line of Epygi IP PBXs, both the cloud-based ones and the physical appliances.

## 5 Requirements for Resellers

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- You should apply for a reseller membership and become a registered user to use the ecQX portal.
- You should have a properly configured Billing Address to purchase the services and to proceed with checkouts.
- You should have an active PayPal account to pay for services and subscriptions. **Note:** Your credit card will be charged automatically for the next subscription period, so be sure you have the required amount available. Also, note that promotions may be active at the time of the order and will be handled automatically (for example, the customer does not have to order an add-on feature if the same feature is being offered as a promotion).

**IMPORTANT:** It is required that the resellers send to Epygi Sales via [sales@epygi.com](mailto:sales@epygi.com) their US Resale Certificate for our files. This applies only to US resellers buying ecQX instances for their customers.

### 5.1 How to Apply for a Reseller Membership

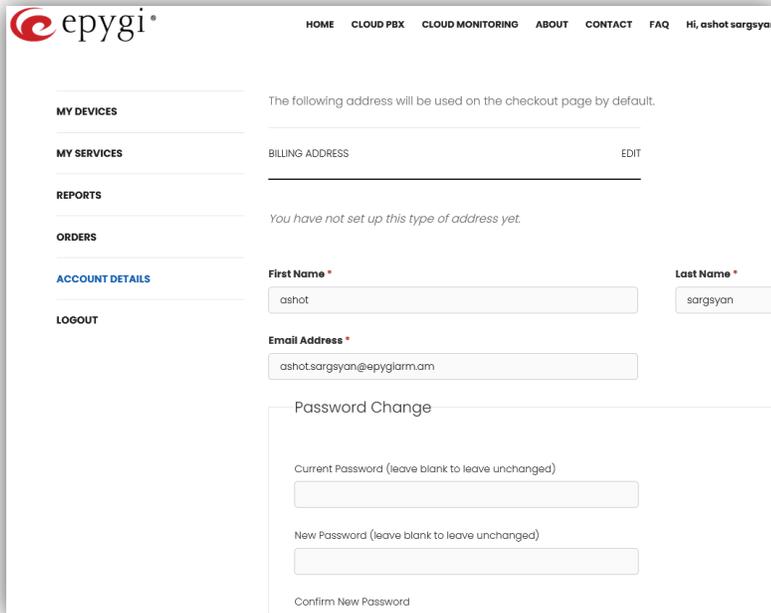
1. Enter [www.epygicloud.com](http://www.epygicloud.com) in your browser's address bar.
2. Go to the **Login** page and click the **Register** button.
3. Fill out the **Registration** form and click the **Register** button to apply for membership.
4. Afterwards, you will get an e-mail notification that your membership request is being reviewed by Epygi.
5. Epygi will approve or cancel your membership request in 24 working hours. You will get an e-mail notification in both cases.
6. After your membership approval you will be able to login into the ecQX portal using your credentials and order the items (services and licenses) described above.

### 5.2 Configuring Account Details

After logging in, configure the **Account Details** for purchasing the ecQX services. The **Account Details** page is used to configure and update the account settings (e-mail address, password, Billing Address, name etc.).

Fill out the Billing Address form to be able to purchase and checkout the ecQX services. To fill it out:

1. Go to **Account Details** page and click the **Edit** button next to the **Billing Address** field.
2. Fill out the Billing Address form and click the **Save Address** button to apply the changes. Note: The Billing Address information may vary from the information used for registering the reseller account.



The screenshot shows the Epygi user interface. At the top, there is a navigation menu with links for HOME, CLOUD PBX, CLOUD MONITORING, ABOUT, CONTACT, FAQ, and a user profile for Hi, ashot sargsyan. The main content area is divided into several sections: MY DEVICES, MY SERVICES, REPORTS, ORDERS, ACCOUNT DETAILS (highlighted in blue), and LOGOUT. The ACCOUNT DETAILS section is expanded, showing a form for updating account information. It includes fields for First Name (ashot), Last Name (sargsyan), and Email Address (ashot.sargsyan@epygilarm.am). Below these is a Password Change section with three input fields: Current Password, New Password, and Confirm New Password. A message above the form states: "The following address will be used on the checkout page by default." and "You have not set up this type of address yet."

## 6 Ordering and Purchasing ecQX Services

### To place the first order

1. Go to the **Cloud QX** page.
2. When you have found a service you need, make sure you check the detailed information, such as service usage and limitations. Click on the offering you need and scroll down to the **Description** section.
3. Click **Add To Cart** to add the offering(s) to your cart for checkout.

**Note:** The ecQX instance must be included in your first order for the checkout to succeed. Also, you will not be able to add multiple ecQXs within the same order.

**Note:** When ordering an ecQX instance you should add in the notes the desired hostname for the fully qualified domain name (FQDN) for that instance. Example, if you provide **syunikwin** as the desired host name it will be addressed to the complete FQDN address - **syunikwin.epygicloud.com**.

### To Proceed to Checkout

1. View your **Cart**, make changes (increase/decrease the item quantity or remove it) and check the Billing Address.
2. After you have reviewed the items in your **Cart**, you are ready to proceed to checkout and complete your order.
3. Click **Proceed to Checkout**.
4. Select the **PayPal** option to immediately purchase the service.
5. Accept the **Terms & Conditions** and click **Go To PayPal** to complete your order.
 

**Note.** If you don't have PayPal account yet, please create it first before placing the order.
6. Provide your **PayPal** credentials to pay for the order. **Note:** The provided PayPal account will be used to charge your credit card automatically for the next subscription period.
7. Afterwards, you will receive two e-mail notifications: one, informing that your order is processing, and the second, about the payment going through.

### To request a free trial for 30 days

You can also request a free trial for ecQX (including licensable services) for **30** days. **Note:** You may request a free trial ecQX or a feature **only once**.

1. View your **Cart**, make changes (increase/decrease the service quantity or remove it) and check the Billing Address.
2. After you have reviewed the items in your **Cart**, you are ready to proceed to checkout and complete your order.
3. Click **Proceed to Checkout**.
4. Select the **Trial Activation** option.
5. Accept the **Terms & Conditions** and click **Place Order** to complete your order.
6. Afterwards, you will receive an e-mail notification informing that your order is processing.

### To request an initial configuration of the ecQX

After placing the order, a new device will be available in the **All Devices** page. You will be able to rename the device and send a request for an initial setup of ecQX.

1. Go to the **All Devices** page.
2. Click the **Device Name** hyperlink. You can rename the device by clicking the **Device Name** field. **Note:** You may also request Epygi Support to rename the device in the **ecQX initial configuration** file.
3. If you need to provide Epygi detailed information about the device initial configuration, you can use a downloadable Excel sheet to fill in the information by clicking the **Download Configuration** icon to download the empty template for ecQX.
4. Open the downloaded file with MS Excel, fill in the needed information, save and upload it back from the same page. Epygi will proceed with the requested initial configuration before providing the device to you. In most cases, however, it will not be necessary to use that Excel file as the basic information is already collected.

When Epygi completes the device configuration, you will receive e-mail notifications informing that the device is available and ready to use.

Your ecQX device will automatically be registered in the ecMON portal, which will allow you to monitor and manage it and receive real-time information about system events, CPU/Memory usage and active calls. For more information about the ecMON service, please refer to the [Epygi Cloud Monitoring Service](#) guide.

## 7 Managing ecQX Services

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After purchasing the ecQX services, you will be able to manage your subscription plan. The following options are available:

- Converting an ecQX trial instance to a paid one
- Increase the subscription plan for services
- Decrease the subscription plan for services
- Unsubscribe from the selected services

### Converting an ecQX trial instance to paid

After ordering a trial instance, a customer may opt to convert it to a paid instance within the 30-day trial period on the same portal:

1. Go to the **Cloud QX** page.
2. Click on the **ecQX** icon and click **Add To Cart** to add the service to your cart for checkout.
3. After you have reviewed the items in your **Cart**, you are ready to proceed to checkout and complete your order.
4. Click **Proceed to Checkout**.
5. Select the **PayPal** option to immediately purchase the service.
6. Accept the **Terms & Conditions** and click **Go To PayPal** to complete your order.
7. Provide your **PayPal** credentials to pay for the order. **Note:** The provided PayPal account will be used to charge your credit card automatically for the next subscription period.
8. Afterwards, you will receive two e-mail notifications: one, informing that your order is processing, and the second, about the payment going through.
9. Send an email to [sales@epgyi.com](mailto:sales@epgyi.com) and specify your intention of converting your trial instance to paid and include the name or the Unique ID of the trial device.
10. Epygi Support will proceed with the conversion and notify you of the change.

### Increase subscription

For example, you have **5** IP Phone Extensions. Now you want to increase it up to **15**. To do so, you will need to purchase an additional **10** IP phone Extensions (for details see below):

1. Go to the **Cloud QX** page.
2. Click on the **IP Phone Extension** service.
3. Select the **Device** from the **Device Name** drop-down list to which you are going to attach the licenses.
4. Select the quantity (10 in this example).
5. Click **Add to Cart**.
6. Review your **Cart** and click **Proceed to Checkout**.
7. Accept the **Terms & Conditions** and click **Go To PayPal** to complete your order.
8. Provide your **PayPal** credentials to pay for the order.
9. Afterwards, you will receive two e-mail notifications: one, informing that your ecQX device request is processing and the second about the payment going through.
10. After receiving the payment, Epygi will immediately increase the extension port count. You will get an e-mail notification about that change.

### Decrease subscription

For example, you have **20** Call Recording ports. Now if you want to decrease port numbers to **12**, do the following:

1. Go to the **All Devices** page.
2. Click the **Device Name** hyperlink.
3. Select the new **Quantity** (in this example 12) for the service.
4. Click **Send Subscriptions Change Request**.
5. Afterwards, you will receive an e-mail notification that your **Subscription Change Request** is processing.
6. Epygi will accept the request and decrease the port number effective the first day of the next month.
7. You will get an e-mail notification that your **Subscription Change Request** is accepted.

## Unsubscribe services

If you want to unsubscribe from some services, please do the following.

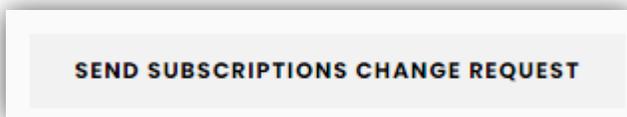
1. Login to <https://www.epygicloud.com/>
2. Go to the **All Devices** page.
3. Click the **Device Name** hyperlink.

#	STATUS	DEVICE NAME	PRICE	HOST ADDRESS	RESELLER	TOTAL PAID	ACTION	COMPANY
283	✔	[REDACTED]	\$ [REDACTED]	[REDACTED] epygicloud.com	[REDACTED]	[REDACTED]		[REDACTED] networking
284	✔	[REDACTED]	\$ [REDACTED]	[REDACTED] epygicloud.com	[REDACTED]	[REDACTED]		[REDACTED] networking
		Device Name	Price	Host Address	Reseller			Company

4. Click the **X** icon next to the **Subscription** to unsubscribe from this service.

	SUBSCRIPTION NAME	QUANTITY
<b>X</b>	ecQX	Activated
<b>X</b>	IP Phone Extension	35
<b>X</b>	Call Recording	6

5. Click **Send Subscriptions Change Request** button



6. Afterwards, you will receive an e-mail notification that your **Subscription Change Request** is processing.
7. Epygi will accept the change request and remove the subscription effective the first day of the next month.
8. You will get an e-mail notification that your **Subscription Change Request** is accepted.

**Please Note.** The unsubscribe services action mentioned above should be completed no later than two working days before the end of current month.

## Ordering ecMON monitoring (30 days demo):

1. Proceed to <https://www.epygicloud.com> and click on CLOUD MONITORING on the top.
2. Select from the options ecMON1, 6 or 10 and add to the “Shopping Cart”.
3. Hover mouse over the “Shopping Bag” icon and click on CHECKOUT.

4. Fill in the company name and address information.
5. Select the “TRIAL ACTIVATION” option, and put a check mark at “PRIVACY & TERMS”. Click “PROCEED TO CHECKOUT” to complete your order.

### Ordering ecMON monitoring (paid):

1. Proceed to <https://www.epygicloud.com> and click on CLOUD MONITORING up top.
2. Select from the options ecMON1, 6 or 10 and add to the “Shopping Cart”.
3. Hover mouse over the “Shopping Bag” icon and click on CHECKOUT.
4. Fill in the company name and address information.
5. For “Paid Activation”, select the “PayPal” button. Check the “Privacy and Terms of Use” box, click on the GO TO PayPal button and fill in on the next page(s) the PayPal credentials to complete the order.

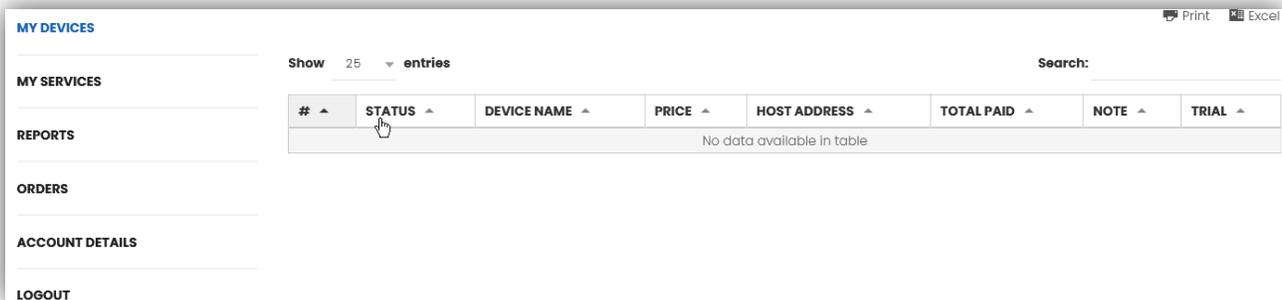
## 8 Services for Logged-in Reseller

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From his account dashboard reseller can view recent orders, manage his devices and edit his password and account details.

### My Devices

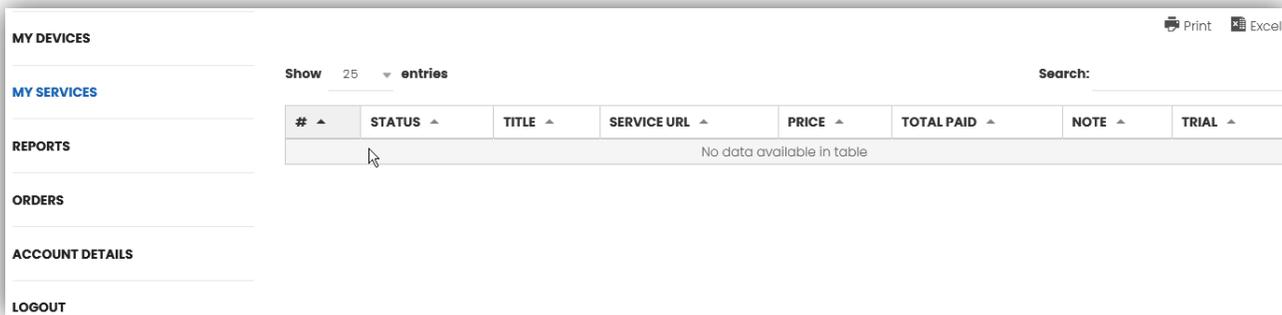
Allow to get detailed statistics and status information concerning the purchased devices



#	STATUS	DEVICE NAME	PRICE	HOST ADDRESS	TOTAL PAID	NOTE	TRIAL
No data available in table							

### My Services

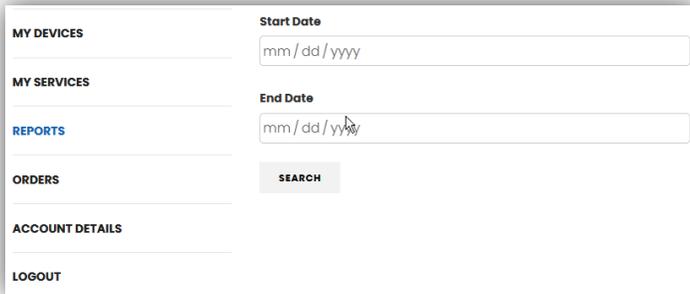
Allow to get detailed statistics and status information concerning the purchased services



#	STATUS	TITLE	SERVICE URL	PRICE	TOTAL PAID	NOTE	TRIAL
No data available in table							

## Reports

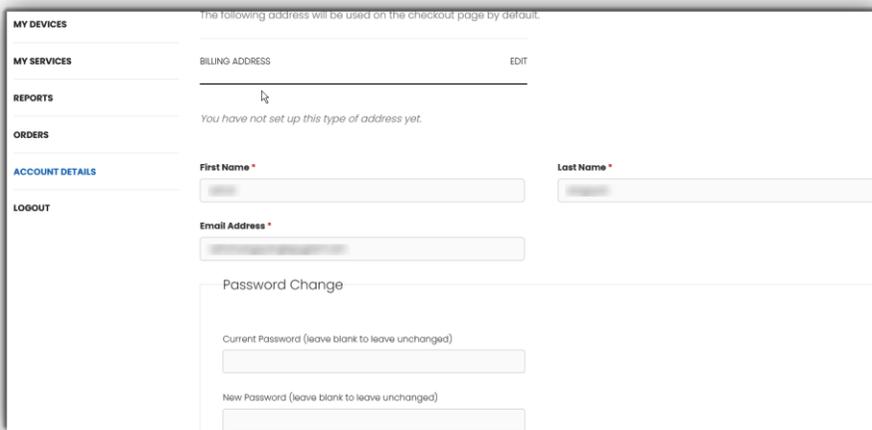
Allow to generate reports concerning the devices purchased during the specified timeframe



## Orders

Show detailed information regarding the orders by reseller

## Account Details



Allows to review and update the account details for reseller

## 9 References

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Refer to the below listed resources to get more details about the configurations described in this guide:

- Manual-I Administration Guide for ecQX
- Epygi Cloud Monitoring Service
- Epygi Price List for Cloud Services

Find the above listed document on [Epygi Support Portal](#).

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