Mobility Batch Processing – User Guide

Calero.com for VITA

www.calero.com

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Mobility Batch Processing

Overview

The Mobility Batch Processing functionality allows users to create or edit multiple mobility requests of the same type by downloading/editing/importing Mobility Batch Processing spreadsheets.

Please Note: Batch processing should only be used for orders with a quantity of 5 or more.

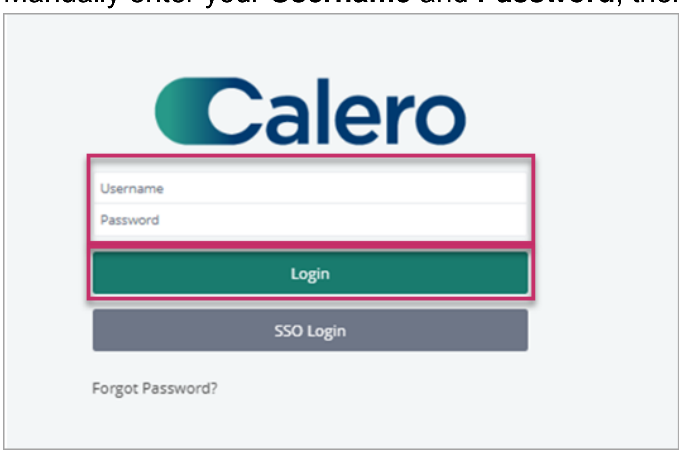
Available Workflows

Mobility Batch Processing is available for the following mobility workflows:

- Cancel Service
- Plan and Feature Change
- New Service
- Suspend Service
- Transfer Service
- Upgrade Device

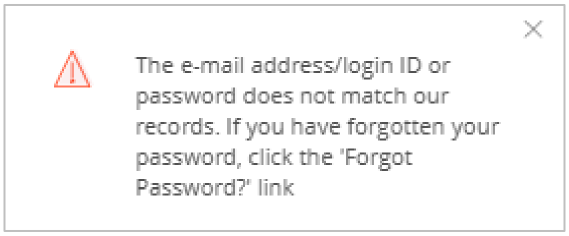
Logging into Calero.com

Manually enter your **Username** and **Password**, then select **Login**.

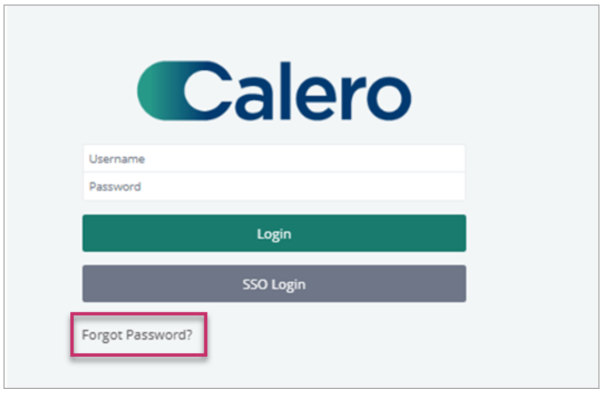


Please note that passwords will expire after 90 days.

If you are having trouble logging in and you are sure the username/password combination is correct, your password may have expired. The system will **not** notify you that your password has expired. You will only be given the error message shown below. The error message will populate for a wrong username/password combination and/or an expired password.



If you have forgotten your password and/or believe your password has expired, please reset your password by clicking on the **Forgot Password?**



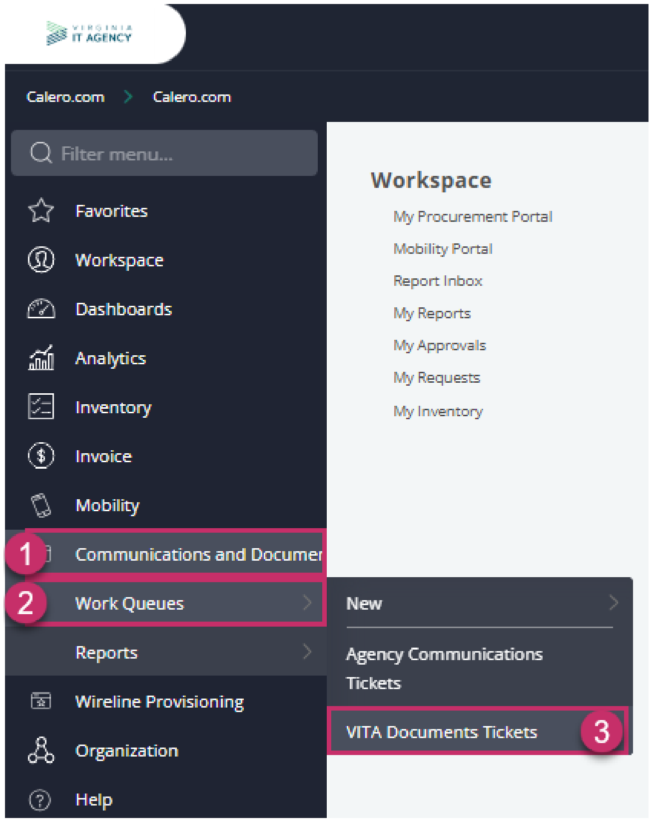
Password Rules

- A new password cannot be the same as the last 5 passwords.
- Minimum password length is 14 characters.
- Must contain at least one: Upper case, lower case, digit, punctuation mark.

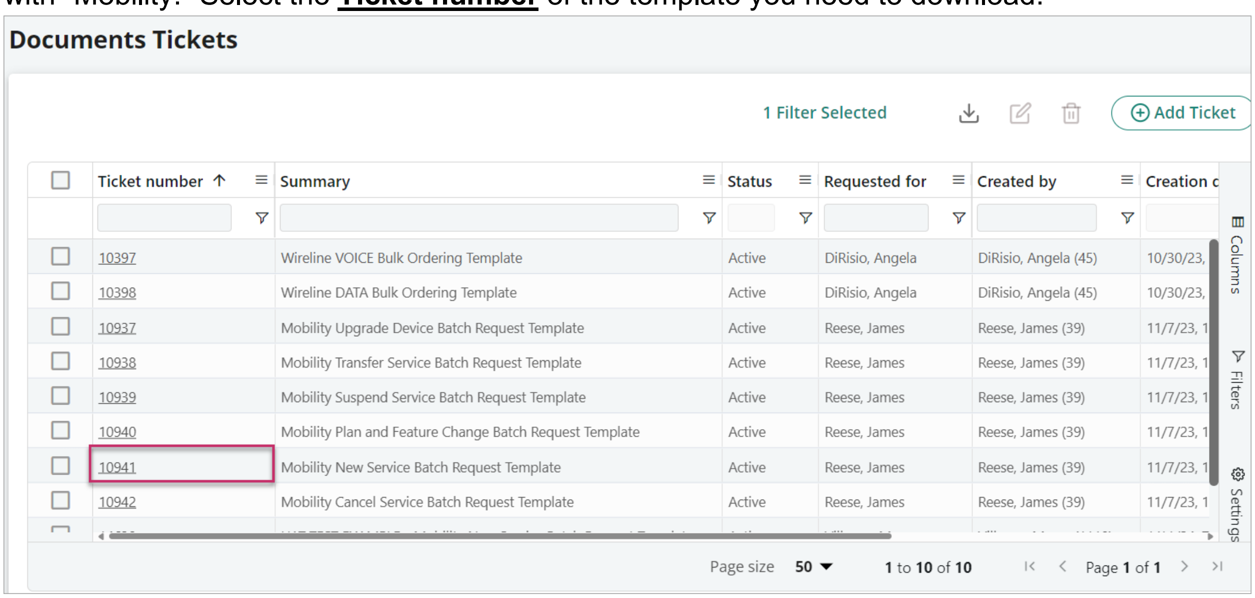
Add Multiple Mobility Requests via Batch Processing

Download Batch Template

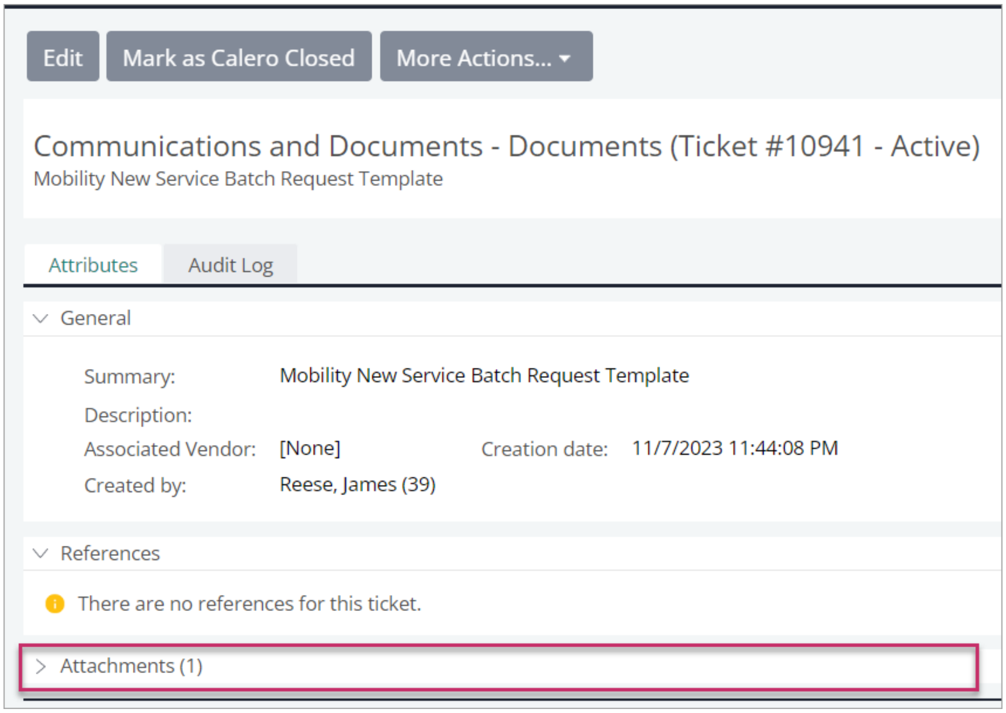
1. Go to **Communication and Documents > Work Queues > VITA Documents Tickets**.



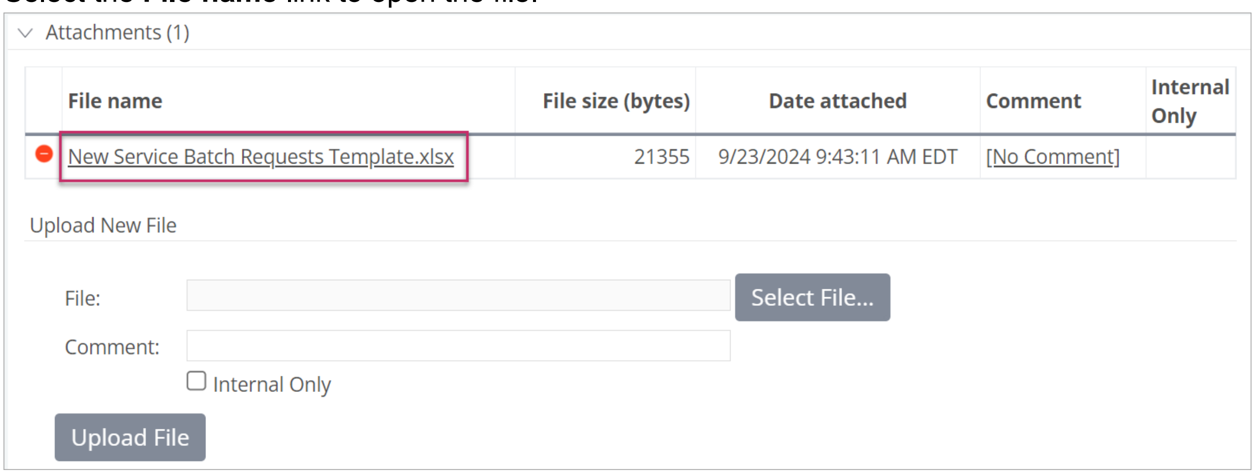
2. The request type will be listed in the **Summary** column. Wireless templates will begin with "Mobility." Select the <u>**Ticket number**</u> of the template you need to download.



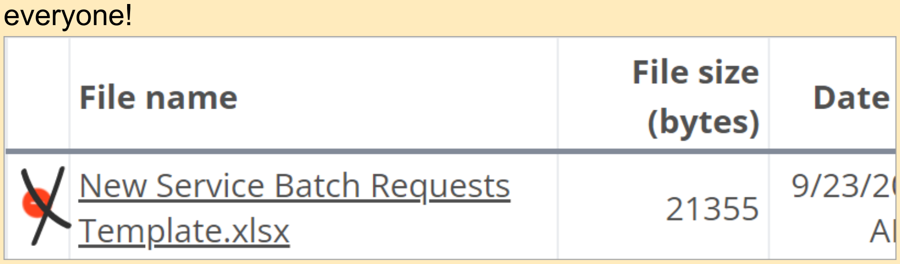
3. Expand the **Attachments** section.



4. Select the **File name** link to open the file.



   - **IMPORTANT**: Do NOT click the red – icon. This will delete the template for everyone!



5. Save the file to your computer.

Fill in the Template

Enter the required fields for each line. The optional fields can be populated if needed. If they are not needed, they can be left blank.

Template Rules

- Different request types cannot be combined on one template, as they each have their *own* designated template. For example, you cannot add an upgrade request on a new service template.
- One row will equal one request for a new phone number. For example, if you need to order 20 new lines and devices, you will need to populate 20 rows on the template.
- There are several columns hidden in the template. Those hidden columns are for Calero internal use only and should ***not*** be populated by anyone else.

Additional information about each request template type can be found here and in the Instructions tab of the template itself.

Using the Mobility Portal to Gather Template Data

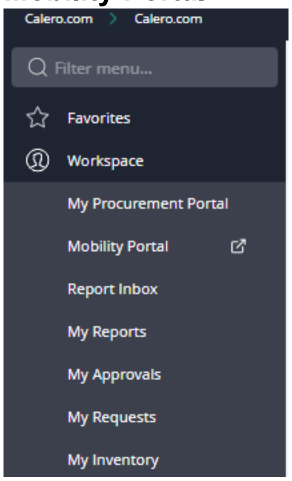
You should use the **Mobility Portal** to gather information on what devices, plans, features and vendors are available to order. You will need to create a mock order and use the Shopping Cart of that order to copy and paste information into the spreadsheet you are creating.

A few things to keep in mind:

- You are creating a mock order/Shopping Cart to get the exact naming conventions of devices, plans, features and vendors.
- Naming conventions for devices, accessories, features, plans, etc. can vary depending on the **vendor** and **device type** selected. You will need to build a Shopping Cart *for each vendor* to get the correct label.
- Make sure you only copy the plan and feature names. Do not include the cost/dollar amount.
- Features that list “credit” in the name do not need to be added to the spreadsheet. These features are built into the plan and will automatically be added by the system.
- The Shopping Cart will provide you with an estimate of a single line (request) on the spreadsheet.
- Make sure you are only pasting the values onto the spreadsheet, not the format. Be especially careful with the “On behalf of Cost Center” column. It is formatted as a “Text” column. The cost center requires the leading zero be included, otherwise it will error out.

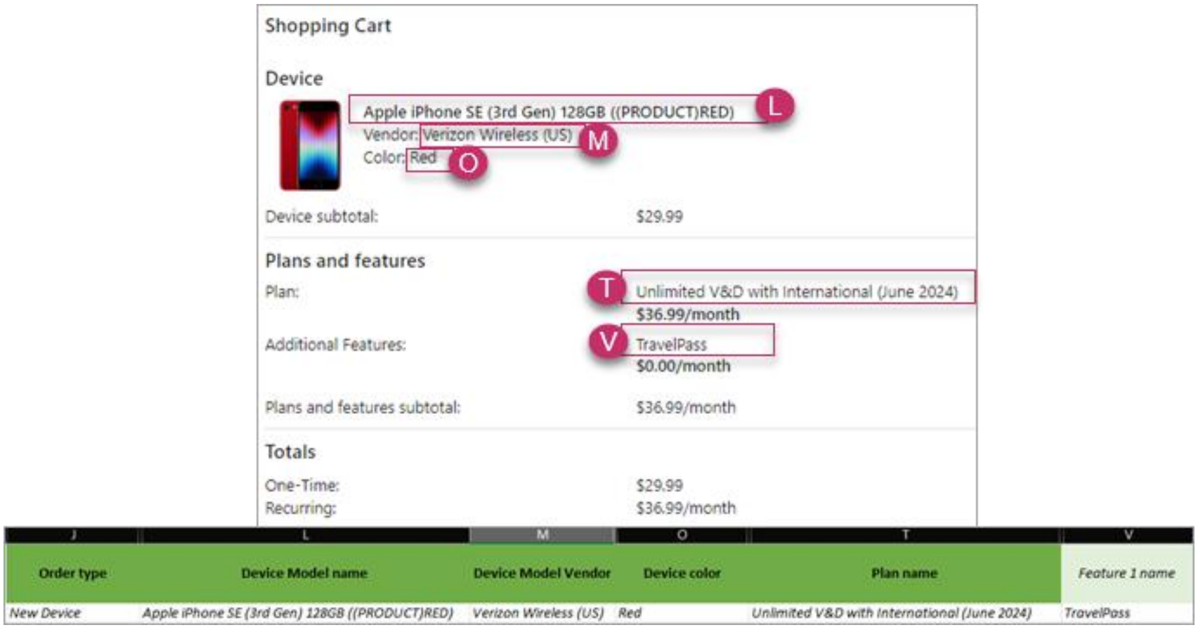
REMEMBER: You are not submitting this mock order; you are only using the Shopping Cart to look at the available devices, plans and accessories available to order. The Shopping Cart will be the ideal place to gather the exact naming conventions needed for the spreadsheet. Once you are done using the Shopping Cart, remember to cancel the order by clicking on **Cancel**.

Example Scenario: Gathering Information for a New Service Request Batch Template.

1. Navigate to the **Mobility Portal** by selecting the **Workspace** module and then selecting **Mobility Portal**.


2. From the "I Want To . . ." section, select **Order Service With Device**.
3. Select the vendor needed.
4. Select the device needed.
5. If accessories are available for the device you selected, you will be presented with those options.
    - **Please note:** There may be times when accessories are not available due to vendor stock issues.
    - Select any accessories you would like to add to your cart.
    - If you do not need accessories, continue to the next screen.
6. Select the plan needed.
    - **Please note:** You can click on the "i" icon, located on the top right corner of the plan, to view available plan information.
7. If features are available, they will appear after you select a plan. Select any feature(s) you would like to add (if available).
8. You have now built your Shopping Cart. You will use the Shopping Cart to populate the spreadsheet with the exact naming conventions needed.
    - **Note:** When pasting items from Portal to the spreadsheet, ensure to paste as "Values only".

9. This image shows how the columns in this particular template align with the Shopping Cart.

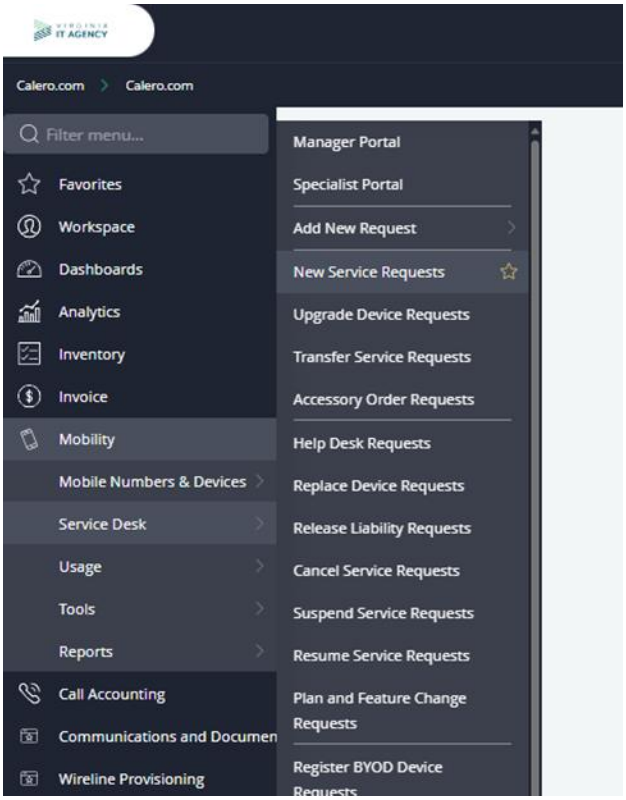


- L: Device Model name
- M: Device Model Vendor
- O: Device Color:
    - **Please note:** If a Device Color needs to be populated on the spreadsheet, the Shopping Cart will display the color that needs to be copied onto the spreadsheet.
    - If a color is not listed in the Shopping Cart, below the Vendor, the Device Color field should be left blank on the spreadsheet.
- T: Plan name
    - Make sure you are only copying the plan name and *not* including the cost per month.
- V: Feature 1 name
    - If there are any required features in your cart, make sure they are added to a Feature # column. *Example*: ATT and FirstNet require a regulatory fee to be added to your order, so there should be one listed in your spreadsheet.
    - Features that list “credit” in the name do not need to be added to the spreadsheet. These features are built into the plan and will automatically be added by the system.
    - Depending on how many unique features are being requested, you may need to use the additional “Feature [#] name” columns provided on the spreadsheet.
- (Not shown) Accessory 1 name:
    - Depending on how many unique accessories are being requested, you may need to use the remaining “Accessory [#] name” columns.
    - **Please note:** If you add an accessory you will need to populate the following two columns for that accessory: “Accessory 1 Vendor” and “Accessory 1 quantity”.

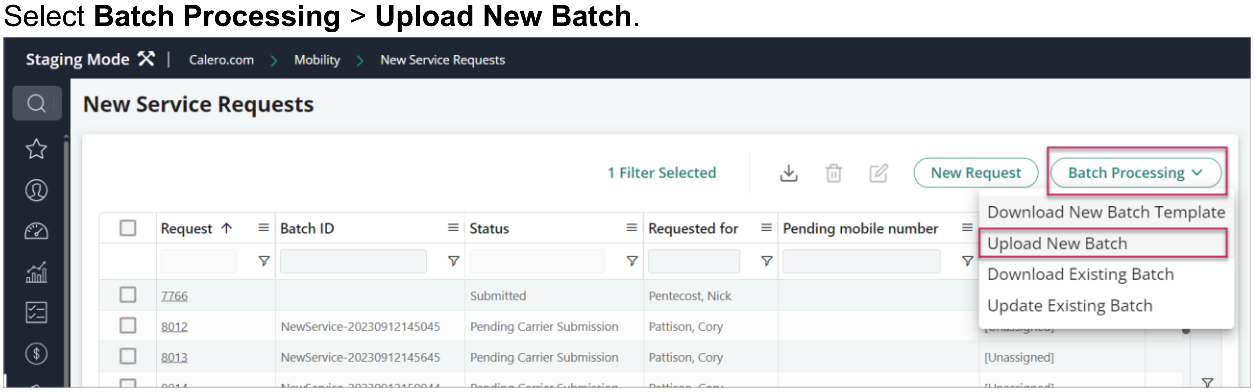
Upload New Batch of Requests

Note: If you need additional details, please refer to the **Instructions** tab of the ordering spreadsheet.

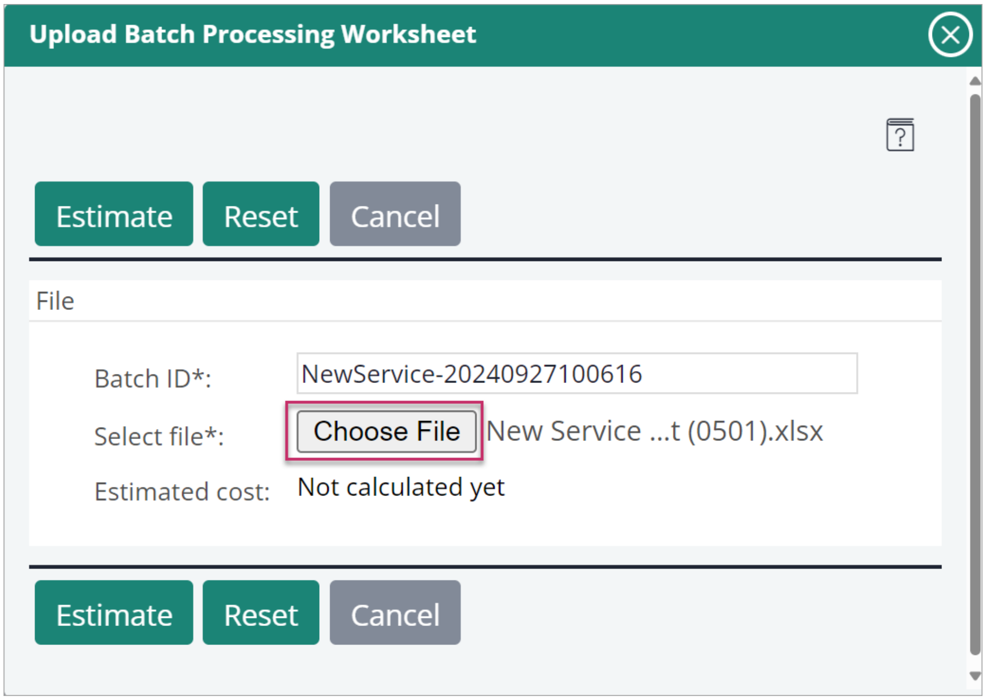
1. Go to the specific **Service Desk** request page needed by clicking on the **Mobility** module and then hovering over the **Service Desk** option.
2. A side menu, with the different request types, will populate. Select the request type you will be uploading.



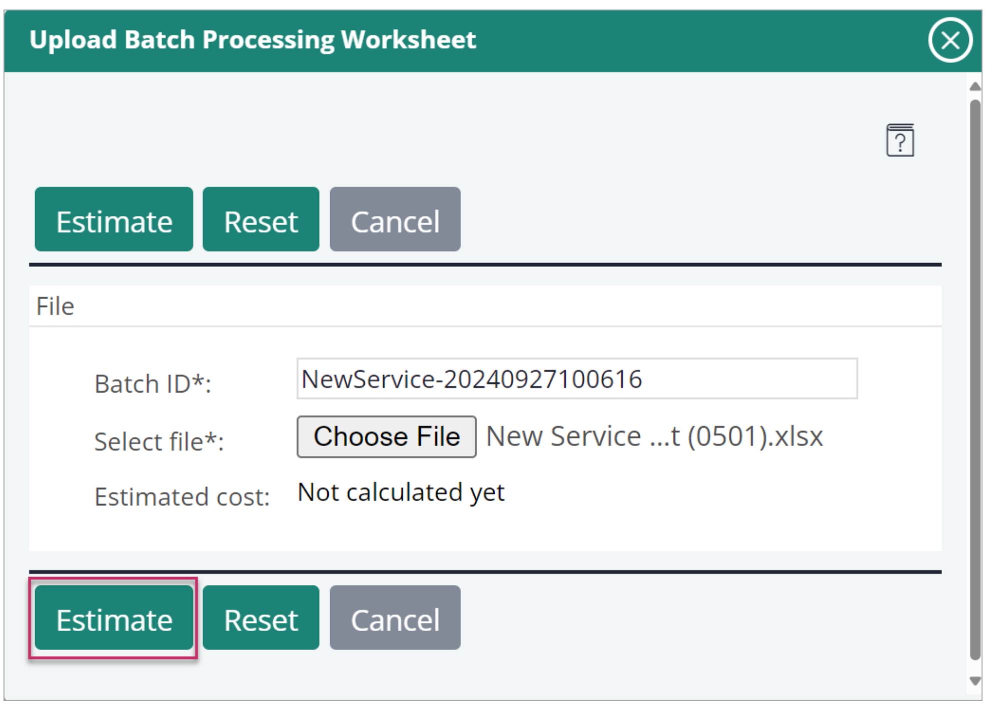
   - **Please note:** You will need to click on the specific request type and **not** the "Add New Request" option.
   - Example: Mobility > Service Desk > New Service Requests. These steps will allow you to upload a New Service batch.
3. Select **Batch Processing** > **Upload New Batch**.



4. The **Batch ID** will auto-generate for you, but you can add additional verbiage for tracking purposes.
5. Select **Choose File**, then select the file to upload.

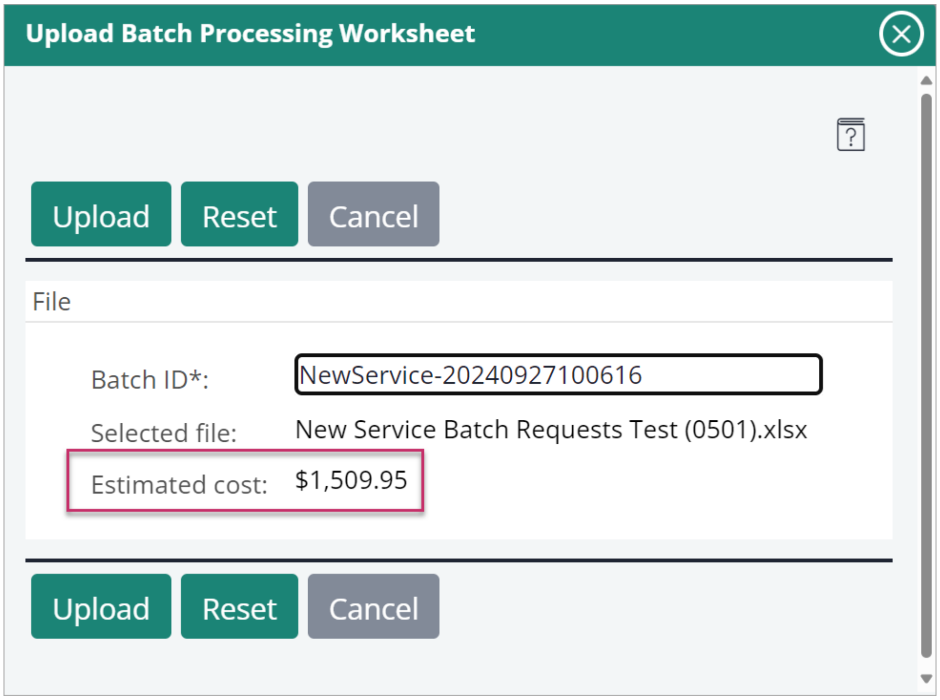


6. Select **Estimate**. The system will begin checking the file and provide you with a device cost estimate.

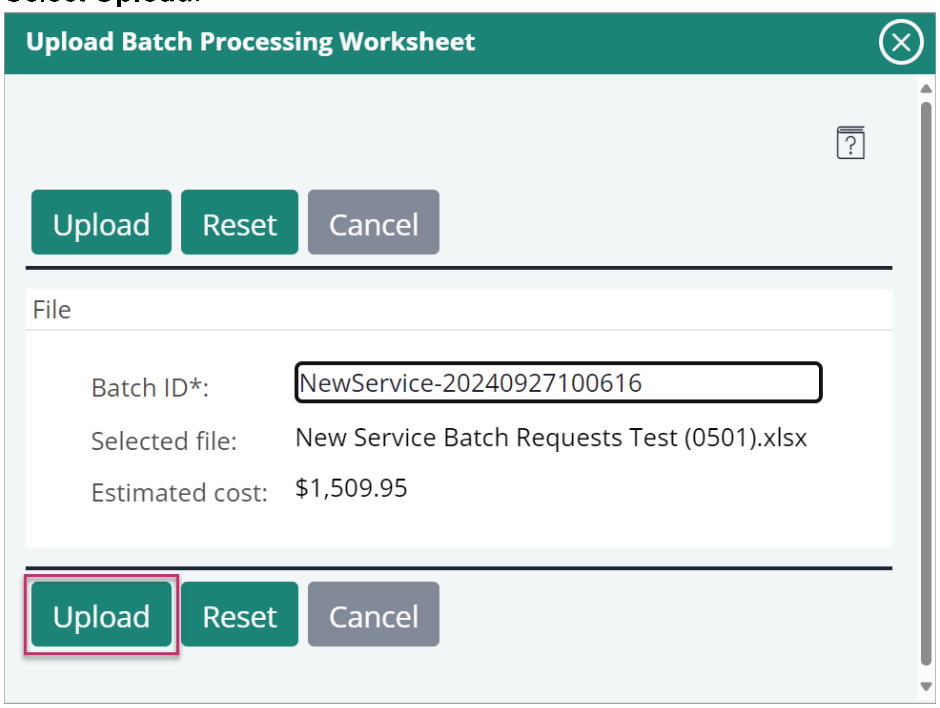


   - Select **Reset** if you want to remove the file you have chosen.

7. Review the **Estimated cost** to make sure it seems correct.



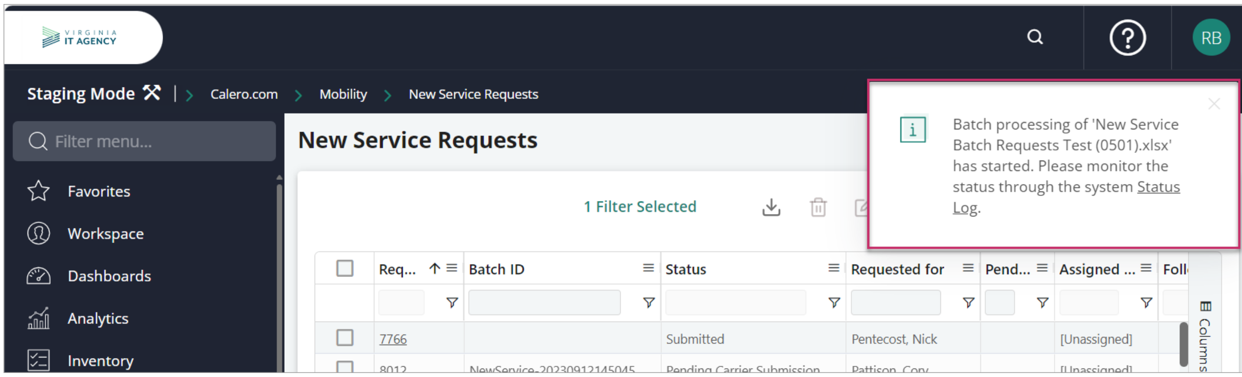
8. Select **Upload**.



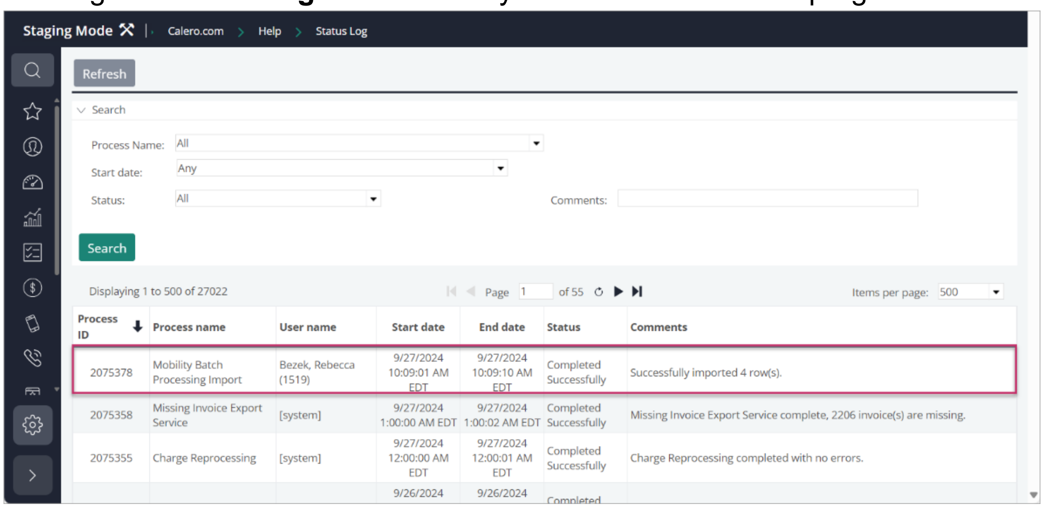
   - If a single row is rejected, the entire worksheet will be rejected, and no new requests will be created.

9. A message notifying you that the file is being processed will appear. You **must** right-click the **Status Log** link and open it in a new tab. Make sure you open it in a new tab so that you can jump between both tabs, without losing the **Status Log** page. The only way to get to the Status Log page is through the link provided in the pop-up.

- If you exit out of the Status Log page before you are done using it, and you no longer have access to the pop-up, you will need to re-upload your file to be presented with the link again (steps 1-8).



10. Clicking the **Status Log** link will allow you to monitor the file's progress.



- Locate your record by referring to the **User name** (name of person who uploaded file) and **Start date** (time file was uploaded) columns.
- The most recent records are displayed first, so if you clicked on the **Status Log** right after uploading it, it should be towards the top of the list.
- Once you locate your record, refer to the **Status** column for information on the file's status.
  - **Running**: This means that the file is currently being processed. It may take the system time to get through the entire spreadsheet. Processing time depends on how many requests are listed in the file.
  - **Error**: There was missing or inaccurate information in the file. The spreadsheet you uploaded will need to be corrected and re-uploaded. No order/request has been created.
    i. Click on the **Mobility Batch Processing Rejection Log** for your record.

Status	Comments
Completed Successfully	Successfully imported 4 row(s).
Error	Some rows were rejected, so no updates were made. See the Mobility Batch Processing Rejection Log for more information.

ii. The first column will explain what row of your spreadsheet the error was found on.

Mobility Batch Processing Rejection Log

Displaying 1 to 7 of 7

Row number	Error message
2	Preferred area code: Enter a valid 3 digit area code.
3	Preferred area code: Enter a valid 3 digit area code.
4	Preferred area code: Enter a valid 3 digit area code.
5	Preferred area code: Enter a valid 3 digit area code.
6	Preferred area code: Enter a valid 3 digit area code.
7	Preferred area code: Enter a valid 3 digit area code.
8	Preferred area code: Enter a valid 3 digit area code.

Displaying 1 to 7 of 7

iii. The second column will provide an error message. You will use this error message to determine what needs to be corrected on your spreadsheet.

Mobility Batch Processing Rejection Log

Displaying 1 to 7 of 7

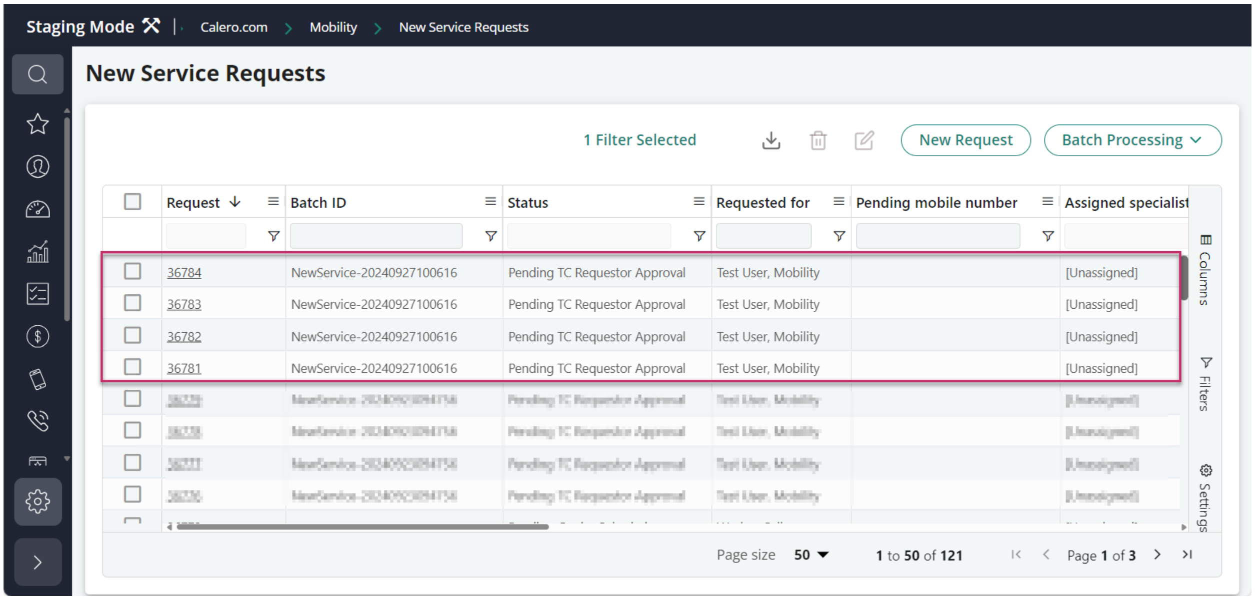
Row number	Error message
2	Preferred area code: Enter a valid 3 digit area code.
3	Preferred area code: Enter a valid 3 digit area code.
4	Preferred area code: Enter a valid 3 digit area code.
5	Preferred area code: Enter a valid 3 digit area code.
6	Preferred area code: Enter a valid 3 digit area code.
7	Preferred area code: Enter a valid 3 digit area code.
8	Preferred area code: Enter a valid 3 digit area code.

Displaying 1 to 7 of 7

iv. If you don't understand the error message, please open a wireless consulting ticket. The ticket should contain all the error message details. You can also attach a copy of the spreadsheet to the Wireless Consulting ticket you opened (after submission). Please refer to the mobility portal user guide for step-by-step instructions.

- **Completed Successfully**: There were no issues with your file. The individual requests have now been created in Calero.com.

11. The requests will now appear on the New Service Requests list page.
    Mobility > Service Desk > New Service Requests.



- After uploading the template, your orders will be assigned a Batch ID. Each individual row on the spreadsheet will be assigned a request number that will be tied to the same Batch ID.
- The individual requests in a Batch will go to a “Pending TC Requestor Approval” status. This means that the request is pending your review and approval or rejection. It will not be processed with the carrier until the order is reviewed and approved.

Example Error Messages

Below are a few examples of the types of error messages you might encounter.

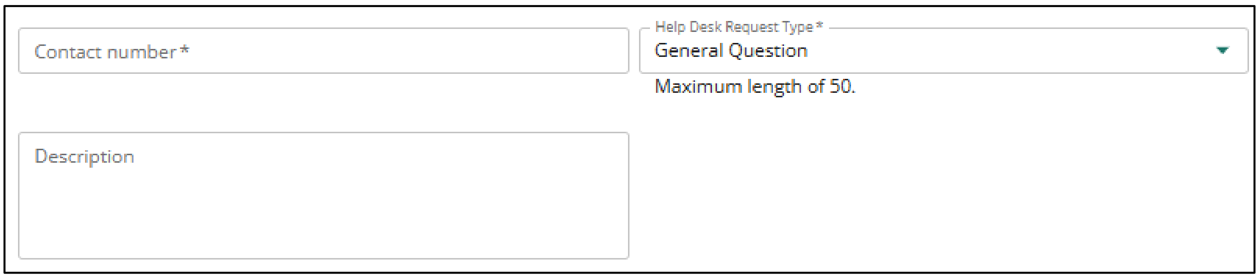
- **Importer '[Requestor Name]' does not have security access to Cost Center**: You are not authorized to place orders for the requested cost center. Please open a Wireless Consulting ticket in the Mobility Portal and list the cost center need access to.

- **The specified Mobile Number '[Mobile Number]' could not be found**: The mobile number you listed was not found as *active* in the system. The number might be disconnected or typed incorrectly. Confirm there is no typo in the spreadsheet.

- **The specified Plan '[plan listed on spreadsheet]' (Carrier 'Verizon Wireless (US)'; Carrier ordering code '') could not be found:** The plan name listed in the spreadsheet does not match what’s setup in the system. The plan name needs to match exactly what’s listed in the Mobility portal. Ensure there are no spaces before or after the plan name you listed and/or there are no typos in the name.

- **Unmapped field (WIRELESS_WirelessPlansJSON): Feature group 'Regulatory Fees' requires a selection:** The plan you have listed requires a "Regulatory Fee" be selected and added to the feature name column of the spreadsheet. This mainly applies to AT&T and FirstNet plans.

Generally, if the error message contains the verbiage "could not be found," it means the data typed into the spreadsheet does not match the system data. If you are having trouble correcting an error message, please submit a "Wireless Consulting" ticket in the Mobility Portal. Include the error message in the **Description** box and any relevant details.

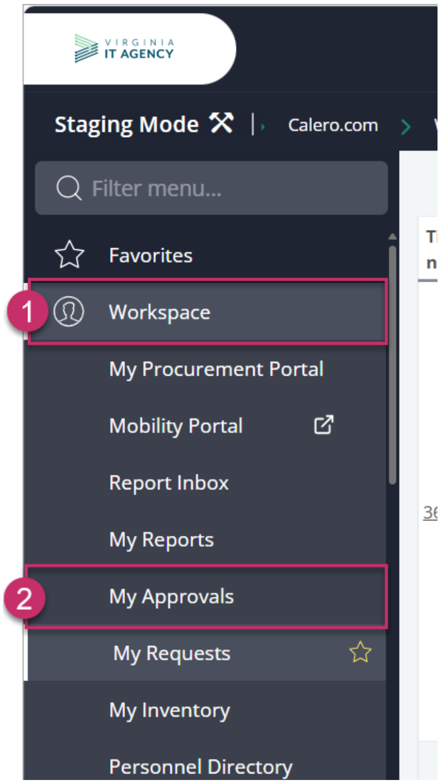


Approve Requests that are Valid

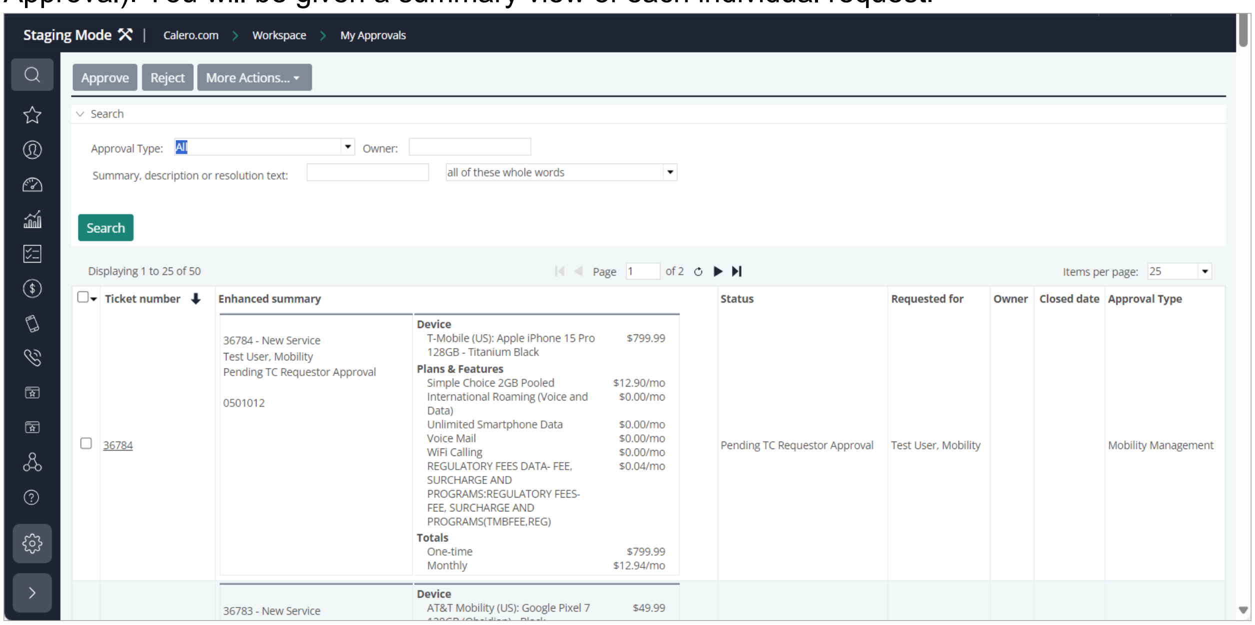
After you successfully upload a batch spreadsheet, ***you must review each request, confirm the details are correct*** and then "Approve" or "Reject" the request. If you do not do this, the requests will not be worked by Calero BPO.

- Batch requests that have device costs require approval before it can be processed with the carrier. If a request does not have a device cost associated, approval will not be required, and it will be sent to the Calero queue for vendor processing.
    - Suspend Service batch does not require approval.
    - Cancel Service batch does not require approval.
    - Plan and Feature Change batch does not require approval.
- Requests can be approved/rejected individually or in bulk.
    - **Approve**: If the order details are correct and it can now be processed with the vendor, the order should be approved.
    - **Reject**: If the individual request is no longer needed and needs to be canceled, you will "Reject" the order. Rejecting a request will not cancel the overall batch, only that individual request number.
- If the request(s) need to be corrected/changed, you have the option to edit a batch *BEFORE* you approve or reject the individual requests. Please refer to the Edit Multiple Mobility Requests section of this guide.

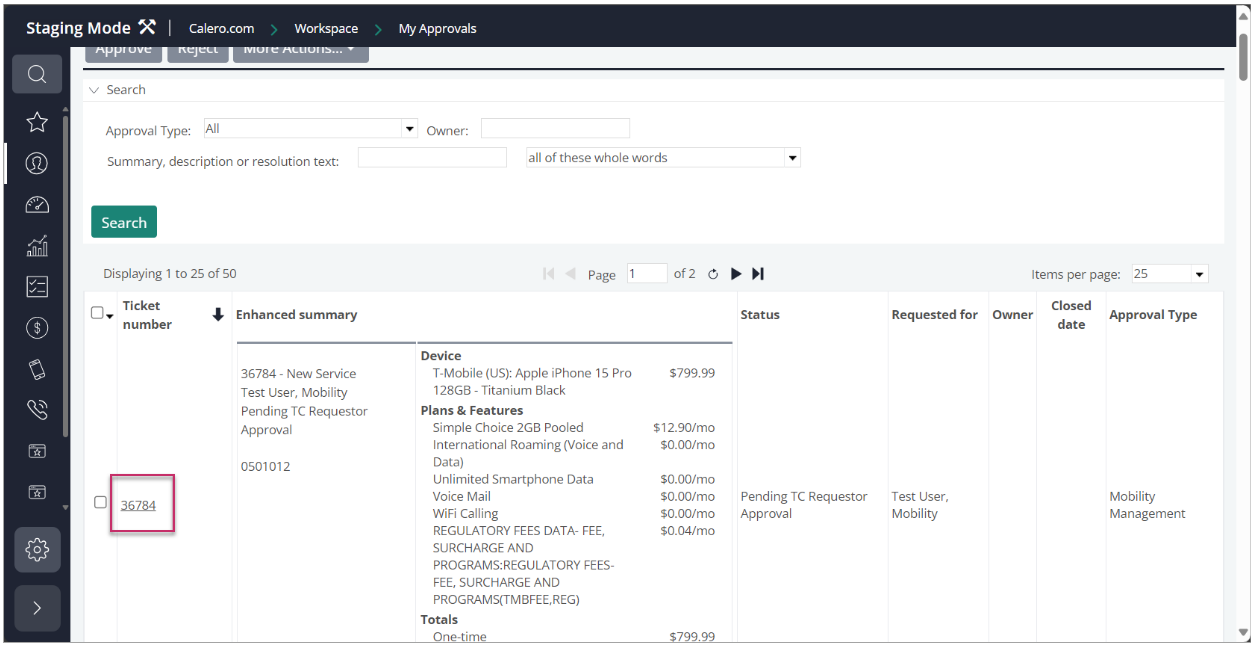
1. Go to **Workspace > My Approvals**.



2. You can review all the requests pending your approval here (Pending TC Requestor Approval). You will be given a summary view of each individual request.

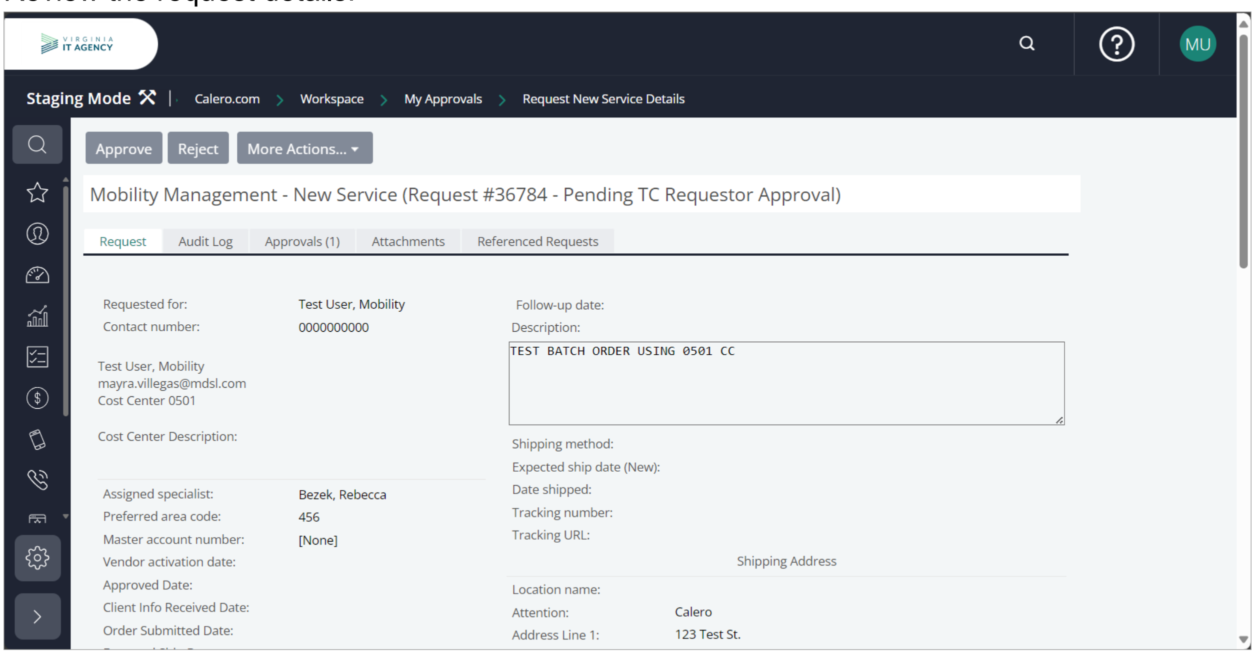


- You can click on the **Ticket number** link to review the rest of the order details, like the Shipping Address.

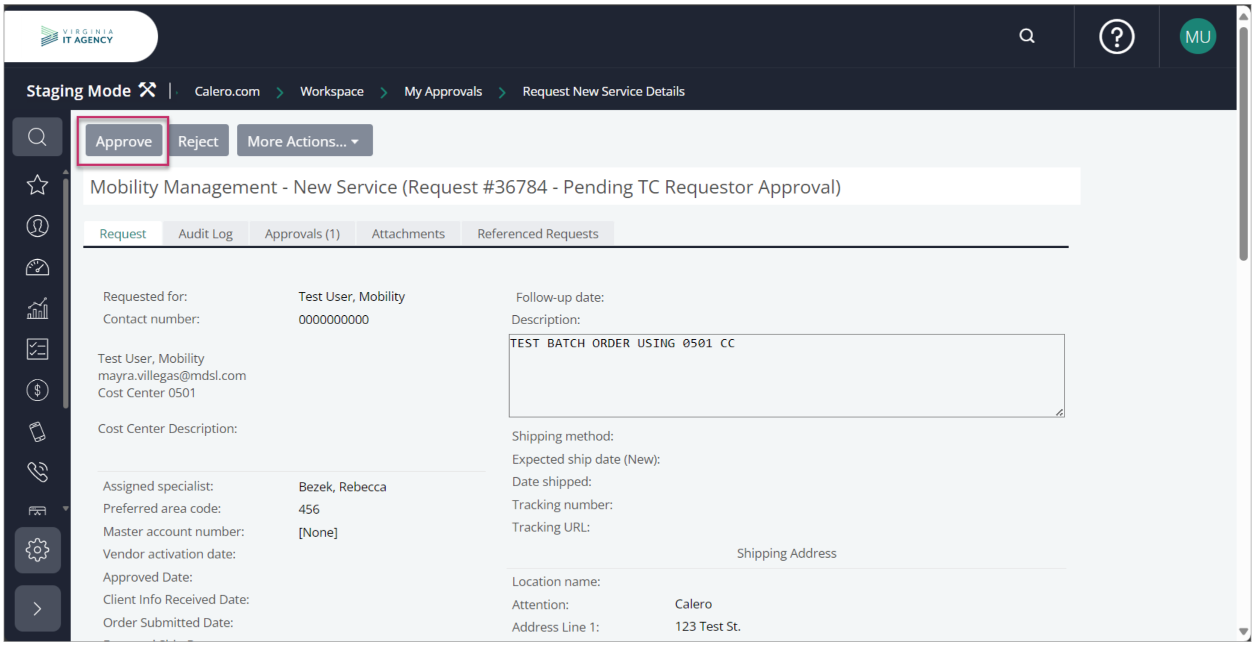


Note: Carefully review the plan, features, equipment and costs before approving. Once an order is approved, it will be sent to the carrier for processing.

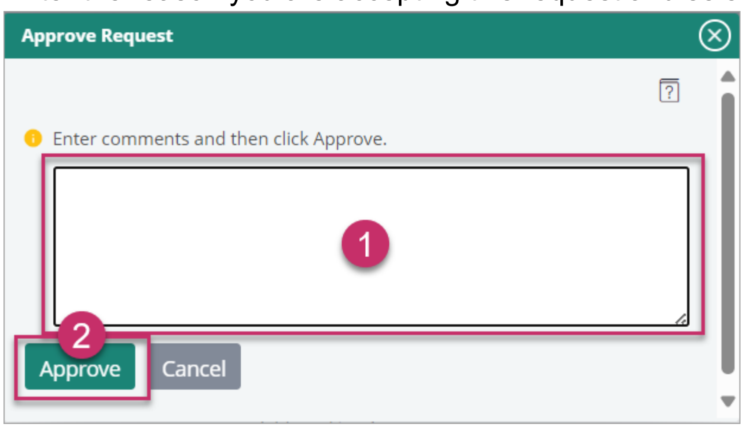
3. Review the request details.



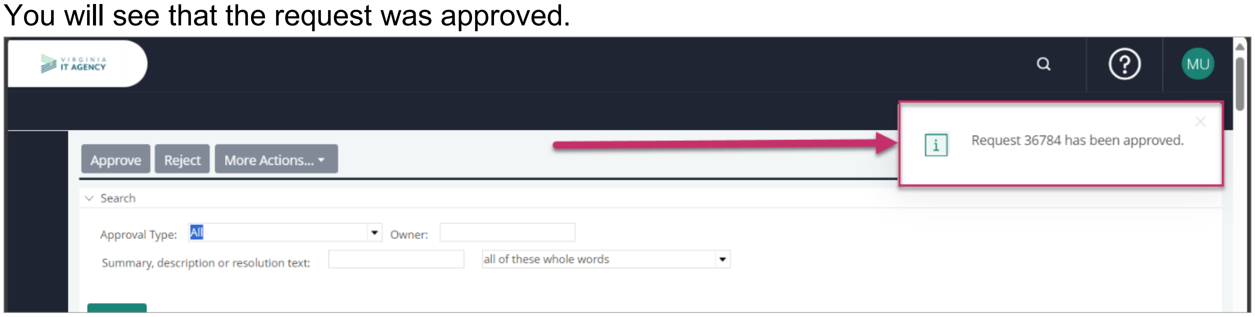
4. Select **Approve**.



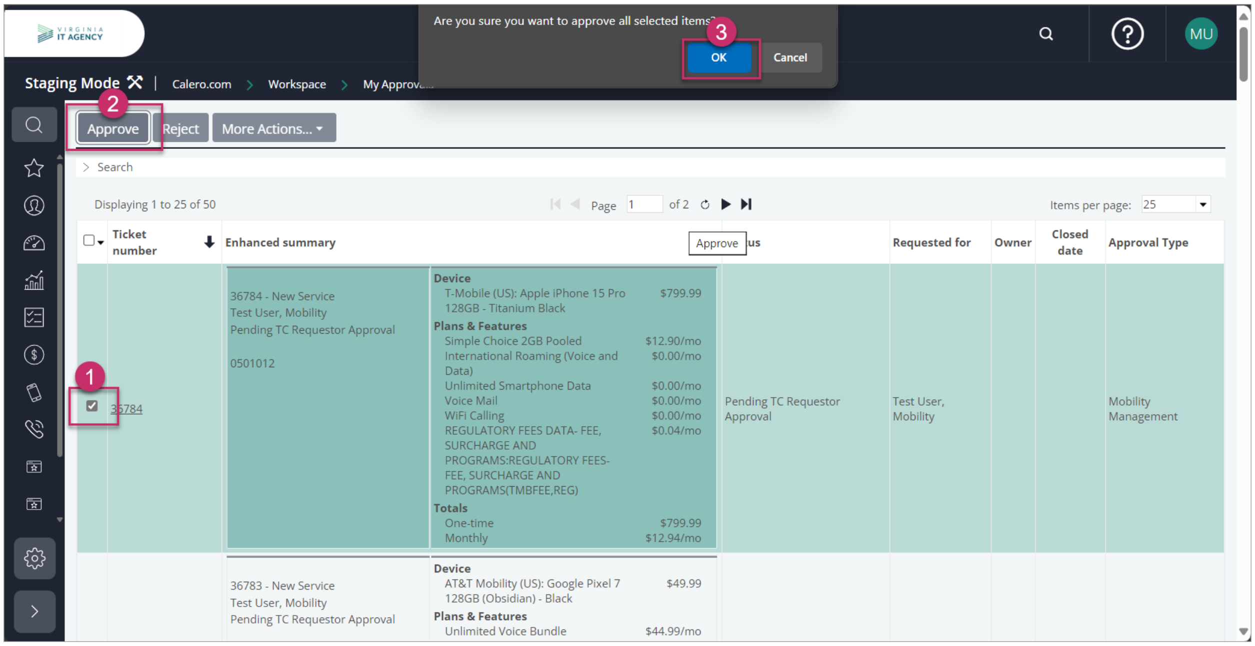
5. Enter the reason you are accepting this request and select **Approve**.



6. You will see that the request was approved.

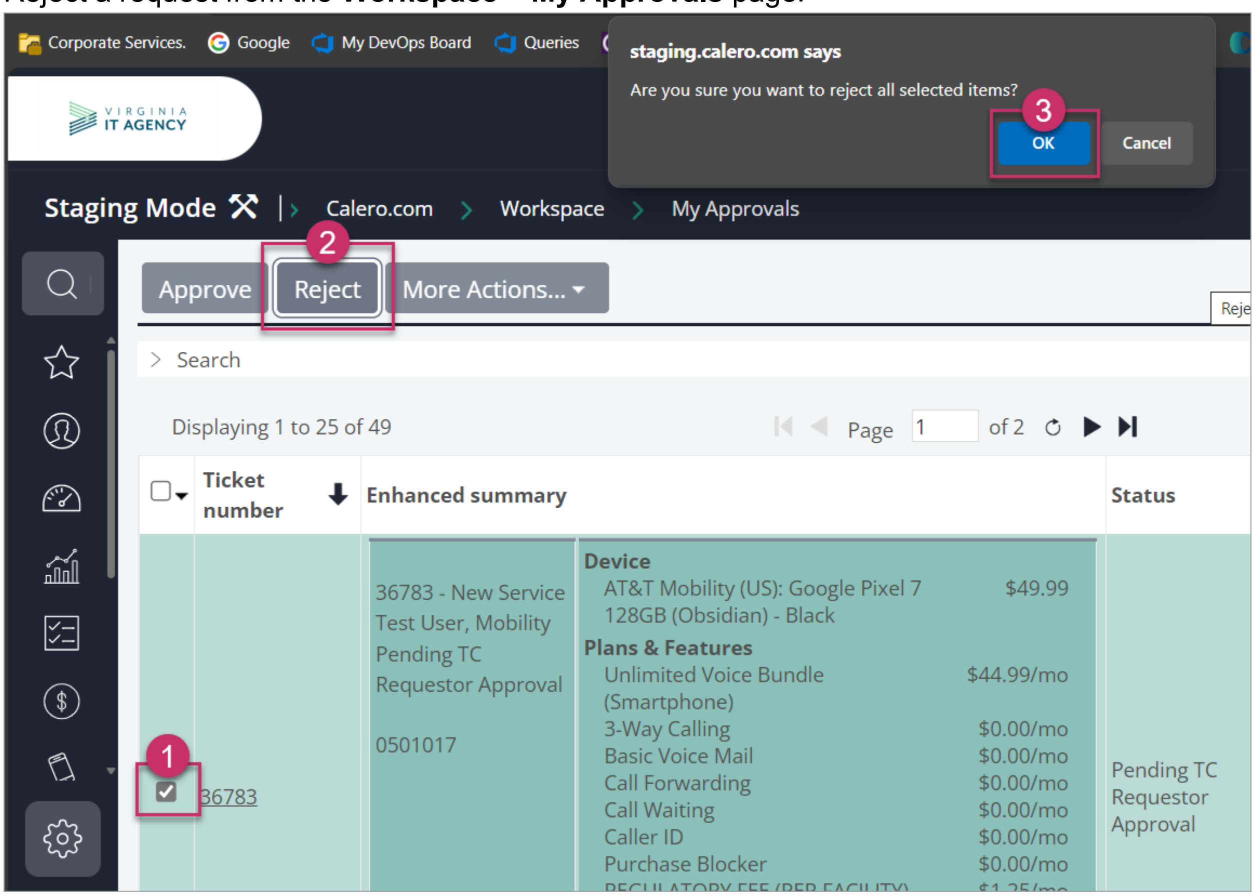


Alternatively, from the **Workspace > My Approvals** page, you can also select one or more requests' checkboxes and then select **Approve and** select **OK** to confirm them all at the same time.

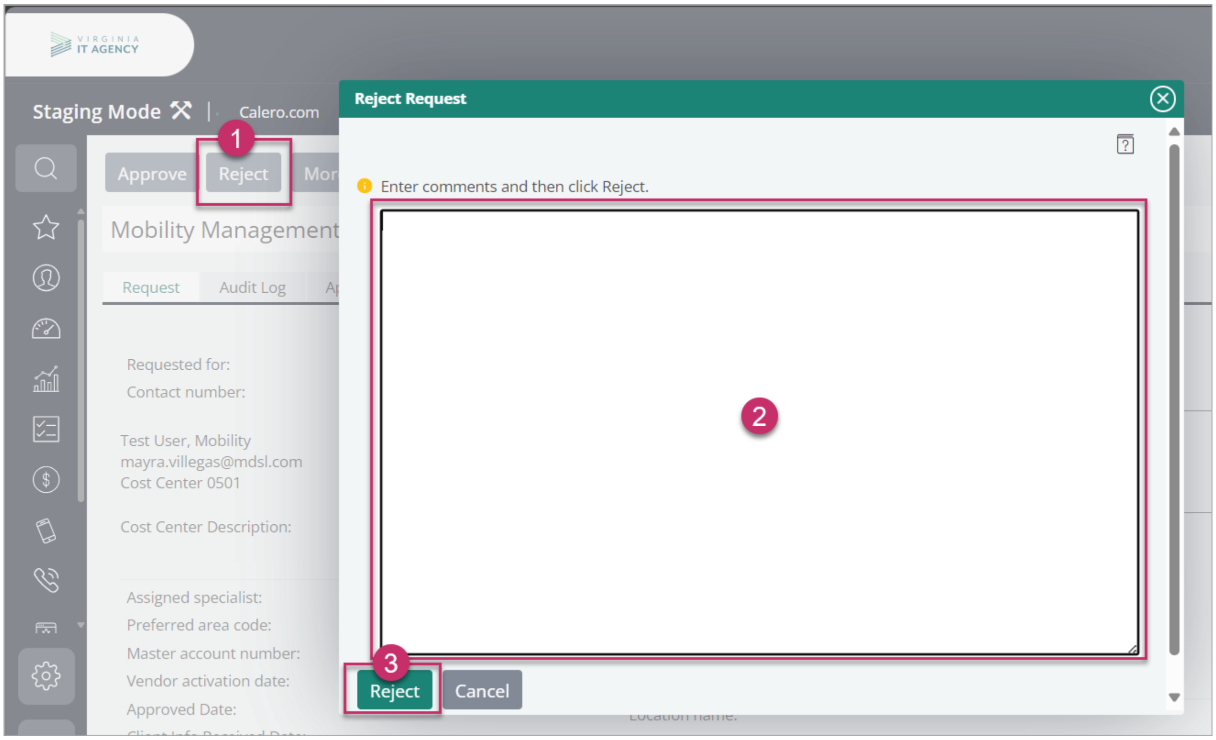


Additional “My Approval” Actions

- Reject a request from the **Workspace > My Approvals** page.

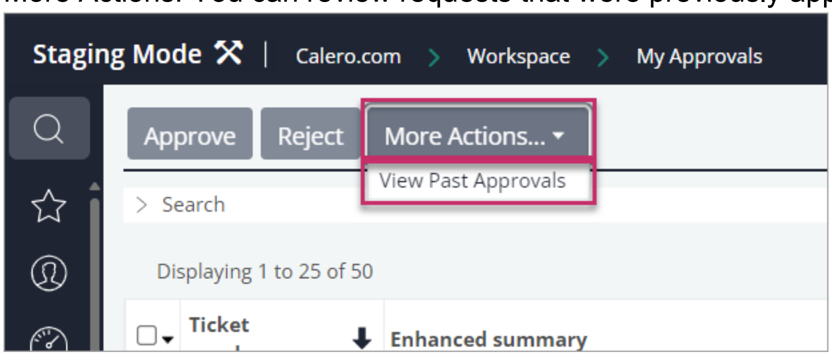


- Reject a request from a request from the request details page (**Workspace > My Approvals > [Ticket number]**).



  - **Note:** Please enter a rejection comment.

- More Actions: You can review requests that were previously approved.



Appendix

Glossary

Term	Definition
Batch	The collection of mobility requests imported in the same batch/bulk spreadsheet. You can enter multiple service requests in one spreadsheet as long as they are all the same type of request.
Batch Processing	The act of adding/editing multiple mobility service requests at once via the bulk processing spreadsheet.
Batch ID	The unique identifier that groups the collection of requests in a batch processing spreadsheet into a batch.
New Batch Template	The empty Excel spreadsheet that is downloaded when the user Selects Batch Processing > Download New Batch Template. It contains the same fields that would be available if you added a request manually using the **New Request** button.

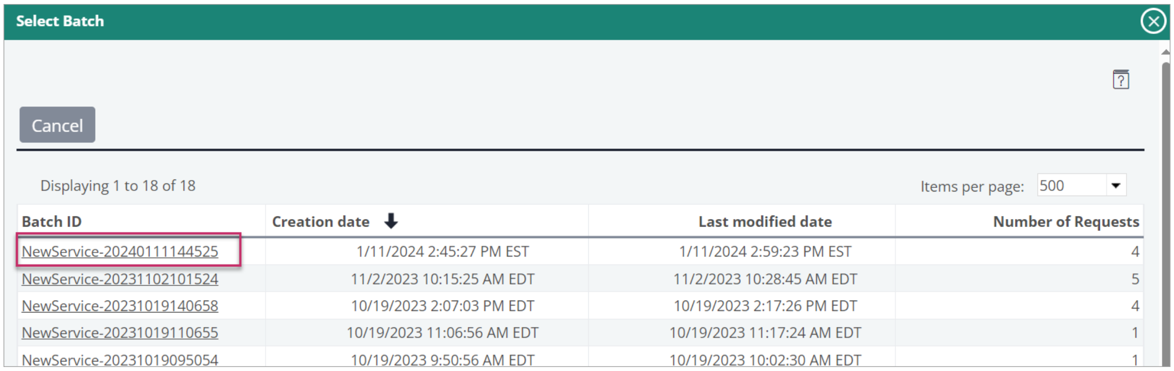
Edit Multiple Mobility Requests

A user would use the Edit Multiple Mobility Request to make changes to the request details ***before*** they approve/reject a request (Example: Address needs to be updated or changed). This process assumes at least one batch of mobility requests has already been added using the Add Multiple Mobility Requests using Batch Processing.

Download Existing Batch

1. Go to the specific Mobility Service Desk page.
2. Select **Batch Processing** > **Download Existing Batch.**
3. Select the **Batch ID** of the batch you want to edit.
4. Save the file to your local machine

5. Update the spreadsheet with your changes.



Update an Existing Batch

1. Go to the specific Mobility Service Desk page.
2. Select **Batch Processing** > **Update Existing Batch**.
3. Select **Choose File** and select the file to upload.
4. Select **Upload**.
    - **Note:** If one row is rejected, the entire worksheet will be rejected, and no new requests will be created.
5. The requests will appear on the list page and can be managed as usual.
6. You can now go to the My Approval section to review and approve the requests.

Reference Info for Each Template Request Type

Request Type: Cancel Service

This request type doesn't require TC Requestor approval after submission. They will immediately be moved to the Calero queue to be processed.

Required fields (dark green and bold text)

- **Requested for**: The email address of the telecommunications coordinator who is submitting the request on behalf of an agency. The user must be an active user in Calero.com.
- **Alternate contact number**: If an issue or question arises, which phone number should be used to reach out for assistance. The phone number should be entered without any special characters or spaces, i.e., numbers only.
- **Mobile Number**: The phone number that needs to have carrier service canceled/disconnected should be added here. The phone number should be entered without any special characters or spaces, i.e., numbers only.

Optional fields (light green and *italicized text*)

- **Description**: A note can be added to the request for future reference. For example, if someone reaches out to ask why the service was canceled, we can refer to the note for further information. **Please note:** That because requests will be going through eBonding (automated carrier process), special instructions for reps cannot be entered here, as they will not be seen.
- **Preferred Cancelation Date**: If there is a preferred or future cancelation date, it can be listed here.
    - **Format**: M/DD/YYYY

Request Type: Plan and Feature Change

Required fields (dark green and bold text)

- **Requested for**: The email address of the telecommunications coordinator who is submitting the request on behalf of an agency. The user must be an active user in Calero.com.
- **Alternate contact number**: If an issue or question arises, which phone number should be used to reach out for assistance. The phone number should be entered without any special characters or spaces, i.e., numbers only.
- **Mobile Number**: The phone number that needs to have their plan changed. The phone number should be entered without any special characters or spaces, i.e., numbers only.
- **Plan Name**: The new requested plan. Be sure to copy the ENTIRE verbiage from the Shopping Cart. Do not include the plan cost.

*** AT&T and FirstNet Plan Changes***

If you're changing to an AT&T and/or FirstNet plan, you're required to add a regulatory fee feature in the "Feature 1 name**"** column. Select the regulatory fee feature that best corresponds to the line's service address. **Please note:** Your selection will be used to provide the line's estimated monthly recurring charge. If the wrong fee is selected, the fee listed on the line's record will be updated to reflect the correct one. Below are the three options. Copy only the **bold blue** text and paste it into the corresponding "Feature 1 name" cell. Please make sure there are no spaces before or after the feature name.

- Northern Virginia area: **REGULATORY FEE NOVA(ATWFEE,REGNOVAC)**
- Maryland area: **REGULATORY FEE MD AREA(ATWFEE,REGMD)**
- Any other area: **REGULATORY FEE (PER FACILITY) MOD23:REGULATORY COST RECOVERY CHARGE(ATWFEE,REG)**

Optional fields (light green and *italicized text*)

- **Feature requests**: If you need an optional feature added, you can use the "Feature # name" columns to list out your feature. Only one feature should be entered per cell.
- **Internal order number:** Can be used to track an internal order number like a work order number or purchase order number.
- **Description**: A note can be added to the request for future VITA reference. For example, if someone reaches out to ask why the plan was changed, we can refer to the note for information. Please note that because requests will be going through eBonding, special instructions for reps cannot be entered here, as they will not be seen.

Request Type: New Service

Required fields (dark green and bold text)

- **Requested for**: The email address of the telecommunications coordinator who is submitting the request on behalf of an agency.
- **On behalf of Cost Center**: The cost center the new service will be assigned to. The cost center must be active in Calero.com and any leading zeros should be included on the spreadsheet.
- **Alternate contact number**: If an issue or question arises, which phone number should be used to reach out to the requestor for assistance. The phone number should be entered without any special characters or spaces, i.e., numbers only.
- **Preferred area code**: The preferred three-digit area code.
- **Order Type**: The type of new service being requested. It is a drop-down with two options.
    - **New Device** - A new device should be ordered along with a new phone number.
    - **Activate Existing Device** - No device should be ordered. I have an existing device I would like to activate with a new phone number. **Please note:** You will have to provide the IMEI of the device on the template.

- **Device Model Name**: The device that should be ordered. For example: Apple iPhone 14 128GB (Blue)
- **Device Model Vendor**: The carrier the device should be ordered from.
- **Device color**: The color that should be requested.
- **Plan name**: The plan that should be requested.
- **Shipping information (columns BH - BM)**
    - Attention
    - Address Line 1
    - Address Line 2
    - City
    - State
    - Zip Code
- **MEID/IMEI/ESN:** Only required if the "Order Type" is set to "Activate Existing Device". The carrier will need to know the IMEI of the existing device you have on hand, to determine the correct SIM needed for service. (Column **DA**)

AT&T and FirstNet Orders

If you're ordering an AT&T and/or FirstNet line, you are required to add a regulatory fee feature in the "Feature 1 name" column. Select the regulatory fee feature that best corresponds to the line's service address. **Please note:** Your selection will be used to provide the line's estimated monthly recurring charge. If the wrong fee is selected, the fee listed on the line's record will be updated to reflect the correct one. Below are the three options. Copy only the **bold blue** text and paste it into the corresponding "Feature 1 name" cell. Please make sure there are no spaces before or after the feature name.

- Northern Virginia area: **REGULATORY FEE NOVA(ATWFEE,REGNOVAC)**
- Maryland area: **REGULATORY FEE MD AREA(ATWFEE,REGMD)**
- Any other area: **REGULATORY FEE (PER FACILITY) MOD23:REGULATORY COST RECOVERY CHARGE(ATWFEE,REG)**

Optional fields (light green and *italicized text*)

- **Feature requests**: If you need an additional feature added, you can use the "Feature # name" columns to list out your feature. Only one feature should be entered per cell. If additional feature cells are required, you can "Unhide" the following columns (up to 10 features can be entered).
- **Accessory requests**: If you need to order an accessory, you can use the "Accessory # name, Accessory # Vendor, Accessory # quantity" to list out the needed accessories. Only one accessory should be entered per cell.
- **Bulk Shipment Requested:** Vendors will normally ship out devices individually. You can use this field to indicate you would like vendor to consolidate the shipments. **Please note:** Some of the vendors have a max device count they can ship out in one box, so you may still receive more than one shipment, depending on how many devices you request.

- **Use priority shipping:** Drop-down with two choices to choose from. **Please note:** If you select "Yes," the requesting agency will be responsible for any additional charges incurred. **If you select "Yes" on the template**, you MUST agree to the Additional Charge Agreement (Mobility Request) by selecting "Yes" in this column as well.
- **Additional Charge Agreement (Mobility Request):** If you opt to request priority shipping, you must agree to pay for any costs incurred. You can agree to the "Additional Charge Agreement" by selecting "Yes" from the drop-down.
  - **If you do not agree**, please change the "Yes" in the "Use priority shipping" column to "No" to opt out of priority shipping.
- **Primary User Address information (columns BY - CC): If the primary service area is different from the shipping address**, please enter the primary service address in these columns.
  - Primary User Address Line 1
  - Primary User Address Line 2
  - Primary User City
  - Primary User State
- **Billing Account Number**: If the phone number must be moved to a specific account number with the new carrier, you can list the account number here.
- **Owner (Mobile Number)**: The name of the employee in possession of the device can be added here. Their first and last name can be entered here.
- **Internal order number:** Can be used to track an internal order number like a work order number or purchase order number.
- **Agency assigned log number (Mobile Number):** This field can be used for an agency's own internal tagging. The field is free form.
- **Description**: A note can be added to the request for future reference. For example, if someone reaches out to ask why the service was ordered, we can refer to the note for information. **Please note:** Because requests will be going through eBonding, special instructions for reps cannot be entered here, as they will not be seen.

Request Type: Suspend Service

This request type doesn't require TC Requestor approval after submission. They will immediately be moved to the Calero queue to be processed.

Required fields (dark green and bold text)

- **Requested for**: The email address of the telecommunications coordinator who is submitting the request on behalf of an agency. The user must be an active user in Calero.com.
- **Alternate contact number**: If an issue or question arises, which phone number should be used to reach out for assistance. The phone number should be entered without any special characters or spaces, i.e., numbers only.
- **Mobile Number**: The phone number that needs to have carrier service **suspended**. The phone number should be entered without any special characters or spaces, i.e., numbers only.

Optional fields (light green and *italicized text*)

- **Suspend by date**: If there is a preferred or future suspend date, it can be listed here.
  - **Format**: M/DD/YYYY
- **Owner (Mobile Number)**: The name of the employee in possession of the device can be added/updated here. Their first and last name can be entered here.
- **Description**: A note can be added to the request for future reference. For example, if someone reaches out to ask why the service was suspended, we can refer to the note for information. Please note that because requests will be going through eBonding, special instructions for reps cannot be entered here, as they will not be seen.

Request Type: Transfer Service

Required fields (dark green and bold text)

- **Requested for**: The email address of the telecommunications coordinator who is submitting the request on behalf of an agency. The user must be an active user in Calero.com.
- **On behalf of Cost Center**: The cost center you are ordering on behalf of. The cost center must be active in Calero.com and any leading zeros should be included in the spreadsheet.
- **Alternate contact number**: If an issue or question arises, which phone number should be used to reach out to the requestor for assistance. The phone number should be entered without any special characters or spaces, i.e., numbers only.
- **Mobile Number to Transfer**: The mobile phone number that needs to be ported/moved over to a new carrier. The phone number should be entered without any special characters or spaces, numbers only.
- **Agency Name:** The field is free form.
- **Agency Division:** The field is free form. This is to help the carrier determine if the agency qualifies for any special plans, for example “Public Safety” plans.
- **Current Carrier:** The carrier the line is currently under.
- **Change Carrier**: Should be set to "Yes"
- **New Carrier:** Identify who the new vendor/carrier will be.
- **Order new Device**
  - **Yes:** A new device needs to be ordered along with the carrier change
  - **No:** Keep existing device
- **Device Model name**: The device that should be ordered. For example: Apple iPhone 14 128GB (Blue)
- **Device Model Vendor**: The carrier the device should be ordered from.
- **Device color**: The color that should be requested.
- **Plan name**: The plan that should be requested.
- **Shipping information (columns CE - CJ)**
  - Attention
  - Address Line 1
  - Address Line 2

- City
- State
- Zip Code

AT&T and FirstNet Orders

If you're transferring to and ordering an AT&T or FirstNet line, you are required to add a regulatory fee feature in the "Feature 1 name" column. Select the regulatory fee feature that best corresponds to the line's service address. **Please note:** Your selection will be used to provide the line's estimated monthly recurring charge. If the wrong fee is selected, the fee listed on the line's record will be updated to reflect the correct one. Below are the three options. Copy only the **bold blue** text and paste it into the corresponding "Feature 1 name" cell. Please make sure there are no spaces before or after the feature name.

- Northern Virginia area: **REGULATORY FEE NOVA(ATWFEE,REGNOVAC)**
- Maryland area: **REGULATORY FEE MD AREA(ATWFEE,REGMD)**
- Any other area: **REGULATORY FEE (PER FACILITY) MOD23:REGULATORY COST RECOVERY CHARGE(ATWFEE,REG)**

Optional fields (light green and *italicized text*)

- **Owner (Mobile Number):** The name of the employee in possession of the device can be added here. Their first and last name can be entered here.
- **Agency Division**
- **Billing Account Number**: If the phone number must be moved to a specific account number with the new carrier, you can list the account number here.
- **Feature requests**: If you need an additional feature added, you can use the "Feature # name" columns to list your additional feature. Only one feature should be entered per cell.
- **Accessory requests**: If you need to order an accessory, you can use the "Accessory # name, Accessory # Vendor, Accessory # quantity" to list out the needed accessories. Only one feature should be entered per cell.
- **Use priority shipping:** Drop-down with two choices to choose from. Please note that if you select "Yes," the requesting agency will be responsible for any additional charges incurred.
- **Bulk Shipment Requested:** Vendors will normally ship out devices individually. You can use this field to indicate you would like vendor to consolidate the shipments. **Please note:** Some of the vendors have a max device count they can ship out in one box, so you may still receive more than one shipment, depending on how many devices you request.
- **Additional Charge Agreement (Mobility Request):** If you opt to request priority shipping, you must agree to pay for any costs incurred. You can agree to the "Additional Charge Agreement" by selecting "Yes" from the drop-down. If you do not agree, please change the "Yes" from the "Use priority shipping" column to "No".

- **Primary User Address information (columns BY - CC): If the primary service area is different from the shipping address**, please enter the primary service address in these columns.
    - Primary User Address Line 1
    - Primary User Address Line 2
    - Primary User City
    - Primary User State
- **Agency assigned log number (Mobile Number):** This field can be used for an agency's own internal tagging. The field is free form.
- **Internal order number:** Can be used to track an internal order number like a work order number or purchase order number.
- **Description**: A note can be added to the request for future reference. For example, if someone reaches out to ask why the service was ported/changed carrier, we can refer to the note for information. **Please note:** Because requests will be going through eBonding, special instructions for reps cannot be entered here, as they will not be seen.

Request Type: Upgrade Device

Required fields (dark green and bold text)

- **Requested for**: The email address of the telecommunications coordinator who is submitting the request on behalf of an agency. The user must be an active user in Calero.com.
- **Alternate contact number**: If an issue or question arises, which phone number should be used to reach out to the requestor for assistance. The phone number should be entered without any special characters or spaces, i.e., numbers only.
- **Mobile Number**: The mobile phone number that needs to be upgraded. The phone number should be entered without any special characters or spaces, numbers only.
- **Device Model name**: The device that should be ordered. For example: Apple iPhone 14 128GB (Blue)
- **Device Model Vendor**: The carrier the device should be ordered from.
- **Device color**: The color that should be requested.
- **Plan name**: The plan that should be requested.
- **Shipping information (columns BV - CA)**
    - Attention
    - Address Line 1
    - Address Line 2
    - City
    - State
    - Zip Code

Optional fields (light green and *italicized text*)

- **Feature requests**: If you need an additional feature added, you can use the "Feature # name" columns to list out your feature. Only one feature should be entered per cell.

- **Accessory requests**: If you need to order an accessory, you can use the "Accessory # name, Accessory # Vendor, Accessory # quantity" to list out the needed accessories. Only one feature should be entered per cell.
- **Bulk Shipment Requested:** Vendors will normally ship out devices individually. You can use this field to indicate you would like vendor to consolidate the shipments. **Please note:** Some of the vendors have a max device count they can ship out in one box, so you may still receive more than one shipment, depending on how many devices you request.
- **Use priority shipping:** Drop-down with two choices to choose from. **Please note:** If you select "Yes," the requesting agency will be responsible for any additional charges incurred.
- **Additional Charge Agreement (Mobility Request):** If you opt to request priority shipping, you must agree to pay for any costs incurred. You can agree to the "Additional Charge Agreement" by selecting "Yes" from the drop-down. If you do not agree, please change the "Yes" from the "Use priority shipping" column to "No".
- **Internal order number:**. Can be used to track an internal order number like a work order number or purchase order number.
- **Agency assigned log number (Mobile Number):** This field can be used for an agency's own internal tagging. The field is free form.
- **Owner (Mobile Number):** The name of the employee in possession of the device can be added here. Their first and last name can be entered here.
- **Description**: A note can be added to the request for future reference. For example, if someone reaches out to ask why the line was upgraded, we can refer to the note for information. **Please note:** Because requests will be going through eBonding, special instructions for reps cannot be entered here, as they will not be seen.