

Fonality Channel Program Partner Guide

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Introduction

The Fidelity Partner Guide will assist you in understanding the opportunities, benefits, processes, and resources available to your company as a Fidelity partner. It also outlines the requirements that must be met to maintain eligibility. By registering on Fidelity's Partner Exchange site and accepting the Fidelity Partner Program Guide, YOU ACKNOWLEDGE THAT YOU HAVE READ AND AGREE TO BE BOUND BY THE FONALITY PARTNER PROGRAM AGREEMENT [FOUND HERE](#).

1. Fidelity Partner Program

1.1 Partner Categories

Fidelity offers three partnership categories based upon the level of engagement and commitment desired by the partner.

1.1.1 Referral Partners refer sales opportunities to Fidelity to engage and transact directly with end customers. In exchange for closed leads, the partner receives a one-time commission after the business is transacted.

1.1.2 Authorized Partners commit to modest sales and training goals in order to work with Fidelity channel managers to co-sell Fidelity products and services to their customers. Authorized Partners may transact as an agent or reseller.

1.1.3 Certified Partners commit to taking the steps necessary to gain a high level of self-sufficiency and sales success. Fidelity is considered to be a key partner in their product portfolio, and they engage in ongoing business planning to promote continuous development and growth. Certified Partners may transact as an agent or reseller.

1.2 Partner Category Requirements and Benefits

Each category includes requirements to maintain placement in the program and benefits earned by meeting those requirements. Failure to meet the requirements of the assigned program category could result in a loss of benefits, including residual commission payments.

The following matrix summarizes the benefits and requirements of each partner category followed by descriptions of each benefit and requirement.

	Referral	Authorized	Certified
Requirements			
Partner agreement	X	X	X
W9 or equivalent	X	X	X
Annual sales goal	-	10 new seats OR 2 new server IDs	100 new seats OR 10 new server IDs OR \$35,000 in bookings
Complete partner orientation	-	X	X
Product training	-	X	X
Sales training	-	Optional	X
Technical training	-	Optional	X
Fonality presence on corporate website	-	Optional	X
Provide level one support	-	Optional	X
Participate in quarterly business reviews (QBR)	-	-	X
Benefits			
Agent Compensation	\$75 per seat one-time	1xMRC bonus + 12% MRC recurring	1xMRC bonus + 20% recurring
Reseller Discount	-	Hardware 10% Software 10% Services 10% Support 5%	Hardware 20% Software 30% Services 20% Support 30%
MDF Accrual	-	-	Available
Assigned Channel Manager	-	X	X
Demo/NFR Program	-	X	X
Fonality Partner Exchange	-	X	X
Online training access	-	X	X
Lead Lock	-	X	X
Online quote tool	-	X	X
MDF Requests	-	-	X
Priority support queue	-	-	X
Harmony program	-	-	X
Partner Advisory Council	-	-	By invitation

1.2.1 Requirements Descriptions

1.2.1.1 Partner Agreement: All Fonality partners are required to execute the Fonality Partner Agreement.

1.2.1.2 W9 or equivalent: To be eligible to receive referral fees or commission payments, partners must submit an IRS W9 or equivalent document for foreign entities.

1.2.1.3 Annual sales goal: Authorized and Certified Partners are required to commit to the annual sales goals for their category. Authorized Partners can meet this requirement by activating ten new user software licenses (aka seats) or by activating two new customer accounts (as determined by newly assigned server IDs). Certified Partners can meet this requirement by meeting one of the following: activating 100 seats, ten new customer accounts, or by achieving \$35,000 in bookings. Booking credit for monthly subscription sales will be equivalent to the twelve months of the monthly recurring charges minus taxes or other regulatory fees.

1.2.1.4 Complete partner orientation: New Authorized and Certified Partners are required to attend, or complete online, a partner orientation session.

1.2.1.5 Product training: Authorized and Certified Partners are required to complete the product training modules as they are offered and review new modules as updates are made.

1.2.1.6 Sales training: Certified Partners are required to complete the sales training modules as they are offered and review new modules as updates are made.

1.2.1.7 Technical training: Certified Partners are required to complete the technical training modules as they are offered and review new modules as updates are made.

1.2.1.8 Finality presence on corporate website: Certified Partners are required to present Finality on their corporate website in a manner determined to be adequate by Finality Channel Marketing. Finality must provide its partners with branding guidelines, content, assets, and other reasonable assistance.

1.2.1.9 Provide level one support: Certified Partners are required to provide level one support to their customers. This includes accepting inbound customer support requests and performing an adequate level of troubleshooting prior to escalating to Finality via the priority support queue.

1.2.1.10 Participate in quarterly business reviews (QBR): Certified Partners commit to a quarterly business reviews (QBR) with Finality to measure progress and create plans for further development and growth. Partner participants in the QBR should include an executive sponsor, sales champion, technical champion, and marketing coordinator. It is understood that some professionals may play multiple roles in their organization.

1.2.2 Benefits Descriptions

1.2.2.1 Agent Compensation: Each category of partner may transact Finality business as an agent. Referral Partners receive a one-time referral fee, while Authorized and Certified partners receive a one-time bonus equivalent to one month's charges plus a residual monthly commission. Residual monthly commissions are only paid to partners who are compliant with the requirements of the partner program. Finality does not pay commissions for (usage, shipping, expedite fees, taxes, or other regulatory fees).

1.2.2.2 Reseller Discounts: Authorized and Certified Partners may transact Fidelity business as a reseller in which Fidelity products and services are purchased by the partner at a discount then resold to their customers.

1.2.2.3 MDF Accrual: Certified Partners are eligible to accrue marketing development funds (MDF) based upon sales performance. MDF funds may be applied to campaigns approved by Fidelity Channel Marketing and must be redeemed within six months of award.

1.2.2.4 Assigned Channel Manager: Authorized and Certified Partners will be assigned a Fidelity Channel Manager responsible for sales support and partner development.

1.2.2.5 Demo/NFR Program: Authorized and Certified Partners may purchase Fidelity products at a deep discount for the purposes of customer demonstrations and/or internal use. These systems are considered not-for-resale (NFR), meaning that they are not eligible to be sold to end customers.

1.2.2.6 Fidelity Partner Exchange: Authorized and Certified Partners will be granted access for an unlimited number of employees to the Fidelity Partner Exchange (FPX) located at www.fidelity.com/partnerexchange. FPX is an online community that provides Fidelity partners sales and technical resources, continuous updates, and a forum for asking questions and providing feedback.

1.2.2.7 Online training access: Authorized and Certified Partners will be granted access for an unlimited number of employees to online training at no charge. All training modules will be made available for completion, regardless of the category training requirements.

1.2.2.8 Deal Registration: Authorized and Certified Partners have access to deal registration (aka Lead Lock), via the online quote tool. Registering an opportunity will create a notification that will prevent Fidelity from directly marketing to the end customer. For a locked lead to be valid, the partner must enter accurate end customer information, and the request must be approved by channel sales.

1.2.2.9 Online quote tool: After Orientation and Product training are completed; Authorized and Certified Partners will have access to an online tool to generate quotes for Fidelity products and services.

1.2.2.10 MDF requests: Certified Partners may request market develop funds (MDF) from Fidelity for joint marketing activities, regardless of their quarterly bonus eligibility. Approval for MDF is at the sole discretion of Fidelity Channel Marketing.

1.2.2.11 Priority support queue (future): Certified Partners who have met the training requirements of the category will be provided access to a priority support queue at Fidelity. The priority support queue will route the partner's call directly to a level two support technician.

1.2.2.12 Harmony program (future): Certified Partners who have met the training requirements of the category are invited to participate in the Harmony program. The Harmony program provides opportunities for Fonality partners to perform installations as a contractor for Fonality. Harmony also facilitates a co-selling engagement between Certified Partners and the Fonality Corporate Sales team. An executed contractor agreement is required for participation.

1.2.2.13 Partner Advisory Council (future): Certified Partners who have met all of the requirements of the category will be eligible for invitation to the Partner Advisory Council (PAC). PAC may include activities such as executive sponsorship, roundtable discussions, product roadmap briefings, product testing, and conferences.

1.3 Partner Program Frequently Asked Questions

1.3.1 What happens if the requirements aren't met?

A: Not meeting the requirements of your assigned category could result in the loss of those benefits, including a reduction or loss of residual commissions.

1.3.2 What happens if my category changes?

A: Your entire book of business will adjust. For example, if you were receiving 12% residuals on your FCS sales and promoted to Certified, your residuals will change to 20%.

1.3.3 Do I have to meet the requirements of Certified before receiving benefits?

A: All partners must complete training within 60 days once made available to maintain their category. Sales goals are evaluated at the end of the year and are not required to be met in advance.

1.3.4 How does the quarterly bonus for Certified work?

A: For every 50 seats a Certified Partner sells in a quarter, Channel Marketing will allocate \$1,000 in market development funds (MDF). MDF can only be applied to campaigns approved by Channel Marketing. MDF is available for six months from award date.

1.3.5 Does registering an opportunity prevent other partners from selling the customer?

A: Lead Lock only locks out Fonality from directly marketing to a potential customer. It cannot lock out other Fonality partners.

1.3.6 If my commission payment doesn't look correct, what should I do?

A: Per the Fonality Partner Agreement, send an email to partnercommissions@fonality.com within 90 days of the disputed payment or charge.

2. Fonality Partner How To Guide

The following will describe the processes for accessing partner resources and engaging Fidelity in the various functions it performs with its partners. Links are provided where more detailed information is available.

2.1 Register for Fidelity Partner Exchange

The Fidelity Partner Exchange (FPX) is an essential resource for all Fidelity partners. Located at fidelity.bloomfire.com, FPX provides everything a partner needs to be successful including marketing materials, installation guides, and user manuals. FPX also provides a forum for Fidelity to provide timely information to its partners and for partners to post questions and engage in discussions with subject matter experts and fellow partners.

The following are instructions to register for FPX:

- Go to <http://fidelity.com/partnerexchange>.
- Click “Register”
- Enter all requested information
- Click “Complete Application”
- Please allow 24 hours for access approval

The following are instructions to request access for other members of your organization:

- Go to FPX per above
- Log in with email and password
- Click the “gear” icon near the top right of the screen
- Select “Invite Members” from the top down menu
- Enter the email addresses of all of the team members you wish to invite
- Enter a custom message to the invitees if desired
- Click “Invite”
- Please allow 24 hours for access approval

2.2 Engage Fidelity Channel Sales

Fidelity boasts a team of experienced and highly qualified Channel Managers to assist its partners in selling Fidelity solutions and developing their Fidelity partnership. To engage a Channel Manager, please perform the following:

- Authorized Partners should call 877-366-2548, ext. 6680 or email resellers@fidelity.com. The Channel Manager who fields your call will be assigned to your account, and subsequent communication should be directly with him or her.
- Certified Partners should contact the Channel Manager whose contact information was included in the Welcome Email that was received shortly after joining the partner program.

2.3 Create a Customer Proposal for a Fonality Solution

The Fonality Portal offers its partners the ability to create proposals for customers. Fonality partners may also work with their assigned Channel Manager to configure a solution.

- After Partner Orientation and Product training is completed (see sections 1.2.1.4 and 1.2.1.5), Authorized and Certified partners may create their own proposals by accessing the partner portal at portal.fonality.com. Extensive instruction on the product bundles offered and how to run quotes is included in the product training course.
- Prior to training completion or if special assistance is required, Authorized and Certified partners may engage a Channel Manager (see section 2.2) to create proposals on their behalf.
- All proposals, whether created by the partner or Fonality, will be forwarded to the assigned Channel Manager for review and follow up.
- Proposals will not be sent to the end customer unless expressly requested by the partner.

2.3.1 Information Required for a Valid Fonality Proposal

At a minimum, the following information will be required to create a valid proposal:

- Number of Users
- General Feature Requirements.
 - The following provides a good overview of the Fonality feature packages: <https://fonality.bloomfire.com/posts/799271-fonality-essentials-professional-and-ultimate>
- Customer, Partner, or Fonality Provided Phones? Which models?
 - The following lists and compares Fonality's supported phones: <http://www.fonality.com/features/fonality-ip-phones>
- Type of Deployment—Cloud, Private Hosted, Premise, or Software Only
- Network Information including the following (not required to create a proposal but must be provided prior to order):
 - Internet Service Provider
 - Download Speed
 - Upload Speed
 - Cable/DSL Modem Make and Model
 - Router Make and Model
- Payment Method Preferred
 - The following tables display the different payment options available for various deployments:

	Subscription Payment Options			
	Monthly	Quarterly	Annually	Perpetual
Cloud	X	X	X	
Private Hosted	X	X	X	
Premise	X	X	X	X
Software Only	X	X	X	X

	Support Payment Options			
	Monthly	Quarterly	Annually	Perpetual
Cloud	X	X	X	
Private Hosted	X	X	X	
Premise	X	X	X	
Software Only	X	X	X	

	Phones and Server Payment Options	
	Rent	Purchase
Cloud	X	X
Private Hosted	X	X
Premise	X	X
Software Only	NA	NA

- Accurate Customer Information including the following (vital for registering the opportunity see section 2.14):
 - Company Name
 - Contact Name
 - Contact Phone Number
 - Contact Email
 - Street Address
- Partner transaction method (sections 1.2.2.1 and 1.2.2.2). Any deployment that includes a Fonality Calling Plan is restricted to the agent transaction method. If no calling plan is included, partners may transact as resellers regardless of the payment type. The table below lists the transaction options for various deployment methods.

	Partner Transaction Option	
	Agent	Reseller
Cloud	X	
Private Hosted	X	X
Premise	X	X
Software Only	X	X

2.4 Schedule a Product Demonstration for a Customer

Demonstrating the Fonality solution is a key component in the sales process. Fonality offers multiple convenient ways for its partners to expose their customers to its technology as follows:

- Fonality offers pre-scheduled demonstrations twice a week for partners and their customers. The schedule is listed and updated on the Fonality Partner Exchange: <https://fonality.bloomfire.com/posts/857673-fonality-in-action-deminars-offered-to-partners>
- For customers who may require a more customized demonstration experience, partners should contact their Channel Manager (see section 2.2).
- Fonality offers not for resale (NFR) packages at very aggressive discounts for partners who wish to conduct their own product demonstrations (see section 2.10)

2.5 Engage a Fonality Sales Engineer

Fonality Sales Engineers (SEs) are available to Fonality partners for customer opportunities with complex technical requirements or customization. To engage an SE, perform the following:

- All partners should contact their Channel Manager first (section 2.2). The Channel Manager will escalate to a Sales Engineer if appropriate.
- After the Sales Engineer engagement is established for a project, it may be appropriate for subsequent communication to continue directly between the partner and the SE.
- Future projects should begin with the Channel Manager to re-establish contact with an SE regardless of previous engagements.

2.6 Register for the Fonality Training Site

Fonality's training site offers its partners courses related to product, sales, technical, system administration, and usage. Certain courses are required to maintain partnership status (section 1.2). The following is how to register for the site:

- Go to FPX and click "Training" or browse directly to <http://channel.fonality.com/partner-training>
- Complete the information on the web form under "Sign Up Today".
- Click "Submit"
- A confirmation email with login credentials will be sent
- Please allow 24 hours for submission approval

2.7 Access Online Training:

- Once approved for access (section 2.6), go to fonality.litmos.com.
- Log in with the credentials provided on the confirmation email.
- Courses assigned to your log in by Fonality will appear on the front page.
- Additional courses can be found by clicking "Course Library" then the category "Fonality Partner Training" in the right column.
- To begin a course, simply click on the title and progress through the modules.
- Upon completion, Fonality will be notified and will update your partner record.

2.8 Register for the Fonality Portal

Fonality offers its partners an online portal at portal.fonality.com to create proposals and track quote and order status. To register, partners should complete the following:

- Once an individual has completed Partner Orientation and Product Training on the Fonality training site (section 2.7), he/she is eligible to access to Fonality Partner Portal to create proposals.
- To register, send an email to resellers@fonality.com.
- Please allow 24 hours for registration approval.

2.9 Access the Fonality Portal

- Once approved for access, visit portal.fonality.com.
- Enter your email as your username then click “Forgot your password?”
- An email will be sent prompting you to access the site and reset your password
- Only alphanumeric passwords are accepted at this time.

2.10 Order a Not for Resale (NFR) / Demonstration System

To encourage the adoption of its solutions by its partners and to facilitate customer demonstrations, Fonality has introduced an NFR program. This program provides partners with the ability to purchase Fonality solutions at special pricing with the following stipulations:

- NFR packages may only be implemented for the partner’s internal use or demonstration purposes and cannot be sold to or shared with any end customers.
- NFR packages are sold as a monthly, quarterly, or annual subscription only.
- NFR packages and are not subject to partner or volume discounts.
- Partners do not earn commissions against NFR subscriptions.
- Phones are not included with the NFR packages but may be purchased separately from Fonality at the usual partner discount or sourced from the supplier of the partner’s choice.
- NFR pricing is only offered to Fonality partners who meet the minimum requirements of the Authorized partner category. Failure to maintain these requirements could result in an increase in subscription pricing.

The following are the NFR packages offered:

Bundle #1 – NFR Cloud Edition - \$30 per user per month

- | | |
|---------------------------|--------------------------------------|
| • 1 Local Number | • 1 Conference Bridge |
| • 1 Fonality Calling Plan | • 1 Advanced Caller ID Name Service |
| • 1 Gold Support | • 1 Call Center Agent |
| • 1 Advanced User License | • 1 Video Collaboration User License |
| • 1 HUD Mobile License | |

Bundle #2 – NFR Software Only Edition - \$20 per user per month

- 1 Gold Support
- 1 Advanced User License
- 1 HUD Mobile License
- 1 Conference Bridge
- 1 Call Center Agent
- 1 Video Collaboration User License

To receive a quote and place an order for an NFR, partners should perform the following:

- Contact your assigned Channel Manager (section 2.2)
- Request an NFR quote
 - Cloud or software only
 - Number of users
- If acceptable, request that NFR be ordered
- Provide payment information
- E-sign NFR order

2.11 Receive Technical Support for NFR

Cloud NFR Technical Assistance

For Cloud NFR orders, Fonality partners will have access to the same installation assistance that a direct customer would receive from Fonality, including the SmartStart installation wizard, live end user and administrative training, and a direct engagement with a Fonality project coordinator. In addition to the online training offered by Fonality, experiencing this process firsthand should more than enable Fonality partners to confidently offer Fonality Cloud to their customers.

On Premises NFR Technical Assistance

Many Fonality partners choose to implement a Premise or Software Only deployment as their NFR. For these deployments, Fonality offers a one-on-one engagement with a Fonality Sales Engineer (SE) to ensure our mutual success. The following steps outline the process:

1. Order appropriate NFR system (Software Only or Premise)
2. Review the guide located here: http://help.fonality.com/Installation/Fonality_Installation_Guide
3. Complete the Technical Training for Partners course at fonality.litmos.com.
4. For Software Only, follow the instructions contained in the following document to activate your server: <http://goo.gl/9YrWGC>
5. For Premise, receive hardware shipment then follow the installation guide to connect server to LAN and verify connection of server to Fonality data center.
6. Contact your assigned Fonality Channel Manager to schedule training session with the appropriate SE.
7. The training session will include, but not be limited to, the following topics:
 - a. Adding phones
 - b. Creating user accounts
 - c. Creating schedules
 - d. Recording voice prompts

- e. Programming call menus
 - f. Creating and programming queues
 - g. Registering trunks and creating dial plans
 - h. User groups and permissions
8. Contact assigned SE with any follow up questions.

2.12 Engage Channel Marketing

Fonality provides a robust marketing assistance program. We want to ensure all partners have access to tools and resources to help drive success. Our Marketing 360 Program provides easy access to the right sales tools and resources to help you close the deal. Our program also rewards success with Market Development Funds to continue the momentum. To engage our marketing team, you can email channelmarketing@fonality.com.

- The Marketing 360 (M360) program includes a library of sales and marketing collateral, content, and campaigns to help you create awareness about Fonality solutions. The program features a self-service print portal where partners can customize, co-brand and order printed sales collateral in minutes.
- Materials include: Solution sheets, product collateral, email templates, customer case studies, videos, image library, presentations, and more. Most materials are available in editable formats for ease of co-branding.
- All M360 tools can be accessed through the Fonality Partner Exchange (FPX) site at <http://www.fonality.bloomfire.com>.
- The M360 Print Shop is also available directly from the main navigation bar of FPX.
- Channel Marketing also offers a special co-marketing program called Zero to Sixty. The following announcement describes the program in detail:

Do you need help taking Fonality to market? Then this is the program for you!

The Channel Team is proud to launch our new 0-60 Day Program. 0-60 represents a formal plan to help new and existing partners who wish to launch or re-launch with Fonality.

The 0-60 Day program is designed to arm and equip our partners faster so that they are able to take Fonality to their market faster. Here is the best part about the program, OUR CHANNEL MARKETING TEAM PUTS EVERYTHING TOGETHER FOR YOU! There is zero risk involved and you can experience a true partnership with the new channel experience.

Here is a list of the resources we arm you with:

- Press Release
- Co-Branded Materials
 - 2 Solution Sheets
 - 3 eBooks

- 3 Multi-Touch Emails
- Corresponding Landing Page w/ Lead Capture
- Logo's to Update Website
- Ability to host and/or push email list
- Meeting with Marketing Specialist

What do you need to do?

- To get everything kicked off we just a 30 minute conversation to discuss your current marketing strategies.

Ready to Start?

- Email scarman@fonality.com or call 469.252.7400 ext. 3323.

2.13 Request Market Development Funds (MDF)

The Fonality Marketing Development Fund (MDF) Program, our solution for ensuring valued MDF program partners receive additional resources to promote their company, services and relationship with Fonality. Our goal is mutual success and continued strong partnership. Fonality MDF Program funds are distributed based on maximum expected return on investment from specific lead generation marketing activities that are available or proposed to Fonality.

What criteria is required to qualify for MDF:

- Partners must hold a Certified Partner in good status and want to drive VoIP, UC or Telephony messages to market
- Partner must sell at least 50 seats to qualify for an available MDF Program
- Complete and submit MDF form to Channel Marketing for review

Important MDF Information:

- Funds are allocated by the Channel Marketing Team
- MDF requests are processed on a first come, first served basis
- QBR's is a prerequisite for MDF eligibility
- Finality partners may submit one MDF request form per marketing activity
- An MDF request form may be submitted no sooner than 90 days prior to the activity, and no later than 15 days prior to the activity
- Approval is entirely at Finality's discretion. If a request is denied, the partner may contact Finality Channel Marketing department to discuss.
- Finality will make every effort to respond in writing to all MDF requests within 15 business days with an approval or a denial

2.14 Register an Opportunity / Lock a Lead

Finality offers its partners the ability to register opportunities in its database. By registering an opportunity, the partner can be assured that Finality will not engage directly with the end customer unless explicitly requested by the partner. To register an opportunity, the partner should perform the following:

- When a quote is created for a customer at portal.finality.com (section 2.3) by a partner or on the partner's behalf, it automatically registers that customer to the partner.
- If a partner wishes to register an opportunity but additional discovery is needed to run a valid quote, the partner is encouraged to run a "dummy quote" for the customer in order to register the customer information in Finality's system and simply edit the quote when more accurate information is available.
- Accurate customer information, especially company name and email address, is vital to ensure that the opportunity is registered properly.

2.15 Create a Customer Proposal Independently

- Meet the training requirements for direct portal access by completing the Partner Orientation and Product Training courses at finality.litmos.com.
- The Product Training course includes modules on how to create proposals on the Finality portal.
- If additional instruction is required, contact your Channel Manager to make arrangements.
- Section 2.3.1 includes the information required to create a valid proposal.

2.16 Place an Order

- Partner orders are created by Fonality Channel Managers
- To place an order, please provide your channel manager with the following information:
 - Quote number
 - Phone numbers to port (if applicable)
 - Network information (section 2.3.1) if not provided when the proposal was created
 - Shipping address (if different than quote)
 - Payment information such as credit card number (section 2.17)
 - Email for Echosign (must be end customer if partner is transacting as an agent)
 - Project coordinator (customer or partner contact)
- An Echosign, sent by the Channel Manager, is required for all orders over \$1,000
 - If the partner is transacting as an Agent (section 1.2.2.1), the Echosign must be completed by the end customer.
 - If the partner is transacting as a Reseller (section 1.2.2.2), the Echosign will be completed by the partner.
 - Order will not be finalized until Echosign is completed

2.17 Provide Acceptable Payment to Fonality

Acceptable payment methods include the following:

- All major credit cards
- Check or wire transfer for advance payment of perpetual licenses, hardware, and support
- Net terms are available upon credit approval

2.18 Track Order Status

- At portal.fonality.com, partners can check their quote and order status by checking “Quote and Order Summary”
- For more specific information about an order in provisioning, contact your Channel Manager

2.19 Request a Return Merchandise Authorization (RMA)

- For a product defect:
 - Contact support (section 2.25)
 - If the issue cannot be resolved, the support agent will issue an RMA.
 - An advance replacement will be shipped to the customer.
 - A return label will be provided via email to ship the defective product back at Fonality’s expense
- For customers who wish to swap out their phones for a different model on a rental:
 - Create an add on quote (section 2.28) for the phones the customer wishes to purchase.
 - Contact the Channel Manager to place the order.
 - Request for the Channel Manager to process an RMA for the phones the customer wishes to return.
 - The RMA phones must be shipped back to Fonality at the customer’s expense before a billing credit will be issued.

For a license reduction or cancellation, the partner should contact the Channel Manager who can follow an internal process to cancel.

- RMAs are not offered for hardware that was purchased over 30 days ago.
- For RMA status, partners should contact their assigned Channel Manager

2.20 Install a Fonality Solution

Fonality includes installation services at no charge for Cloud or Private Hosted customers. Fonality installation services is available for Premise and Software Only deployments for an additional fee. The following outlines the steps in the process:

- Step One—Software Pre-Configuration
 - When the order is created, a Project Coordinator will be assigned by Fonality to interact with the customer or partner.
 - By default, Fonality will contact the partner directly for installation. If the partner wishes for the customer to be the primary contact for the project, they should make this preference known to the project coordinator.
 - The first contact from the Project Coordinator by email prompts the customer or partner to select an installation option, self-guided Smart Start (only for customers 14 seats or lower) or assisted installation.
 - The following is a demonstration of the self-guided Smart Start tool:
<https://fonality.bloomfire.com/posts/844476-smart-start-installation-overview>
 - The following is an example of the initial email that is sent:

Thank you for choosing Fonality!

IMPORTANT

If you are not the person in charge of installing your Fonality phone system please reply with the contact information of the individual(s) responsible so we can contact them.

I have the following contact information for your organization:

Primary contact:

Phone:

Email:

Your Fonality Server ID is:

Your Fonality Installation Technician is: -

Installation Team Phone Number: (877) FONALITY (366-2548) x6215

Step 1: Software Configuration

Please reply back with your preference, Option 1 or Option 2.

Option 1: Self Paced Configuration with Smart Start

[Watch a 13 minute video tutorial](#) and enter your phone system settings at anytime and at your own pace.

Option 2: Guided Configuration by Appointment

We'll schedule an installation technician to guide you through configuring your phone system's settings. Appointments can be scheduled between 7AM to 5PMPST Monday-Friday and needs to be scheduled 2-5 business days in advance.

Please reply back with your preference, Option 1 or Option 2.

Want to get an overview of the entire 5 step Fonality installation process? [Click Here.](#)

If the partner/customer chooses Option 1: Self-Paced Configuration with Smart Start, the following email is sent:

You are at step 1 of the installation process - software pre-configuration. We will need the relevant information of your users and incoming call routing design so it can be programmed into your new server.

We recommend that you watch this video tutorial first.

Next, please access the Fonality Smart Start portal to get started with entering your information. Please use this link:

http://smartstart.fonality.com/fonality-login?_____

Once you have completed the Smart Start configuration wizard we'll contact you shortly to continue the installation.

If you have any questions please reply back to this email or call us at (877) 366-2548 x6215.

If the partner/customer chooses Option 2—Guided Configuration by Appointment, the following email is sent:

If your Fonality server is hosted in Fonality's private cloud, please wait until we've installed your physical server. Once your server is installed, we'll contact you to schedule your guided configuration appointment. It can take 3-10 business days from the time of your purchase to when the server is physically installed.

If your Fonality server will be shipped and installed in your office, we strongly recommend you to plug in your server before the installation appointment. [Please click here for a simple tutorial.](#) Once your server is delivered to your office, we'll contact you to schedule your guided configuration appointment.

Before Your Appointment

Please have the following information ready:

- Information of each employee who will be assigned a phone (names, email addresses, extension numbers, etc.).
 - If you have lots of users, we recommend you save the user info in an excel spreadsheet. [Instruction on how to download a pre-formatted spreadsheet to enter those information is here](#)
- General ideas about how you'd like your phone system to work:
 - What are your business hours?

- Where should the call be routed during your business hours and after business hours?
- Will you be using call center queues and which employees will be in your queues?
- etc.

Want to get an overview of the entire 5 step Fonality installation process? [Click Here.](#)

- **Step 2—Hardware Installation:** Once the system is configured, an appointment will be scheduled to guide the customer or partner through installation of the phones, answer questions, and provide further configuration assistance. Basic administrative training will also be provided at that time. The following email is sent for on premises deployments:
-

It's time to plug in your server. You are receiving this email if you are installing the phone server on your premise. The server should be already shipped to you.

If you purchased the software only option and using own hardware. You will need to install the Fonality ISO on your server first. The basic steps are:

1. Box the server
2. Plug in the power cord
3. You will need a VGA monitor and a USB keyboard, plug them into the server
4. Connect the ethernet cable from the server to your router or switch. (You will need to have an active Internet connection)
5. Power up the server.

[Click here for screenshots on how to configure your server's network, settings](#)

Once you completed the steps and brought your server online, please reply to this email so we can continue with your installation.

- **Step 3—Testing:** Fonality will test and confirm that the new phone system is working as expected.
 - **Step 4—Training:** Fonality will offer a combination of live training with a master training as well as providing self-help webinars, video tutorials, help wiki, etc. The following email is sent to arrange live training:
-

As you requested, we'd like to schedule a training appointment with you. Our available appointment times are:

[APPOINTMENT TIMES]

Please choose your desired appointment time and reply via email or call (877) 366-2548 x6215. Note that appointment times are not guaranteed until you have received a confirmation email.

What Would You Like to Learn About?

In a 1 hour training session, we can comfortably cover 3 topics, each 20 minutes long. Please chose and reply back with the 3 topics most important to you.

1. Heads Up Display - HUD (Recommended)

User level training: using the HUD program to manage call status, call handling and transferring, chatting, voicemail checking, and more.

2. Physical Desk Phone Usage (Recommended)

User level training: using a photo of your particular phone to gesture to, we walk you through using the phone to place and receive calls, handle multiple calls, transfer, conference, check voicemail, check call history, and much more. We also cover searching help.fonality.com for “phone manuals”.

3. Inbound Call Routing Programming

Administrator level training: how to configure your server to handle incoming calls. Greet the caller, ring a bunch of phones, play custom messages depending on time of day or number dialed, etc.

4. Managing Users and Extensions

Administrator level training: how to assign extension number and phones to users. Edit basic user information from HUD log-ins to voice-mail emails to inbound direct dial numbers.

5. E911 and Phone Numbers

Administrator level training: how to assign E911 address and why it is very important. Understand temporary numbers and out it is used in the number porting process. Add custom phone number and change outbound caller ID.

6. Queues

Administrator level training: how to configure and edit queues for call centers.

7. Groups and Permissions

Administrator level training: how to limit user’s ability to barge other’s calls, run reports, join conference calls, see other’s call status, reset queue stats, etc.

8. Reporting

Administrator and user level: how to run call reports both for regular inbound and outbound calls as well as for queue calls.

9. User Panel

User level training: Logging in, controlling just your extension, updating aspects of your contact details such as mobile number, configuring voicemail-to-email, configuring FindMe. Optionally viewing ACD queue reports.

10. Record-All

Administrator level training: how to manage and configure record-all settings for your users. (Only for customers who purchased record-all)

- Step 5—Number Porting (if applicable): See section 2.21.
- Partners or customers can monitor the status of their installation by emailing their Fonality project coordinator or calling 877-366-2548, ext. 6215

2.21 Install Premise or Software Only Orders

- Premise and Software Only installation and end user training are ultimately the responsibility of the partner. It is recommended that the partner complete the Fonality Technical Training for Partners course prior to beginning a project.
- Remote and onsite support from Fonality is available for a modest fee and can be ordered via the Fonality quote and order portal.
- Any product issues during installation can be addressed by contacting Fonality support.
- The following is a link to the Fonality Premise/Software Only installation guide: http://help.fonality.com/Installation/Fonality_Installation_Guide

2.22 Port Customer Phone Numbers Over to Fonality

Local number porting (LNP) is commonly required by new Fonality Cloud customers. Understanding the following process will ensure that the appropriate expectations can be set with the customer:

- Check to determine if the number is portable. This website is very helpful: <https://www.postqueue.com/secure/portability-checker.php>
- Do not disconnect the customer's service until the LNP process has been completed.
- Fonality does not begin the LNP process until the Fonality system installation has been completed. Once the installation ticket is closed, it automatically creates a ticket with the Fonality LNP group.
- Porting numbers can take anywhere from seven to 30 business days. If the customer wishes to use their Fonality system prior to LNP, it is recommended that they arrange remote call forwarding from the incumbent carrier to the temporary numbers provided by Fonality.
- By default, Fonality will contact the end customer directly to begin porting numbers. If the partner wishes to be the primary contact for the project, they should make this preference known to the Channel Manager during the order process. The following is an example of the first email the customer or partner will receive:

Dear Valued Customer,

You are ready for STEP #1 of 4:

Please provide the following documents for number (s) 5555555:

- 1) *Fonality "Line Number Porting Form" – Please fill out and complete the attached (LNP) form.*
- 2) *"Proof of Ownership" - A copy of your most recent telephone bill or a copy of your Customer Service Record (CSR). For those with paperless billing, a screen shot of the bill is acceptable.*

NOTE: It is important that your company name and numbers you list on the "Fonality Line Number Porting Form" EXACTLY matches your Proof of Ownership.

Please send the completed Fonality LNP form and a valid copy of Proof of Ownership:

via EMAIL: *Simply reply to this email with completed Fonality Line Number Porting form(attached) and Proof of Ownership, or send to lnp@fonality.com. Subject line of email should include your: Server ID/ Sales Order Number.*

via FAX: *310-861-4321 (Include "Attn: Server ID/ Sales Order Number"), Server ID is located on the installation email regarding your account.*

NOTE: *Line Number Porting process takes 7-30 business days after submission of required documents. Incomplete/Invalid documents will SEVERELY delay the line number porting process.*

- To begin the process, the customer must provide a complete and accurate letter of authorization and a copy of a recent phone bill for their current carrier. If the customer does not respond to the first email with that information within three days then a reminder email is sent as follows:

1st Notice MISSING DOCUMENTS for your Line Number Porting – LNP for Server 55555

Dear Valued Customer,

This is a reminder that we have not received the required documents to process your Line Number Porting request. In order to start the transfer process you must complete the Fonality Line Number Porting(LNP) form with a copy of Proof of Ownership(dated within 30 days).

Please send the completed Fonality LNP form and Proof of Ownership:

via EMAIL: Simply reply to this email with completed Fonality Line Number Porting form(attached) and Proof of Ownership, or send to Lnp@fonality.com. Subject line of email should include your: Server ID/ Sales Order Number.

via FAX: 310-861-4321 (Include “Attn: Server ID/ Sales Order Number”)

NOTE: Line Number Porting process takes 7-30 business days after submission of required documents. Incomplete/Invalid documents will SEVERELY delay the line number porting process.

-
- If an additional three days pass with no response, Fonality’s LNP group will call the customer or partner and send a second reminder as follows:

2nd Notice MISSING DOCUMENTS for your Line Number Porting – LNP for Server 55555

Dear Valued Customer,

This is a 2nd reminder that we have not received the required documents to process your Line Number Porting request. In order to start the transfer process you must complete the Fonality Line Number Porting(LNP) form with a copy of Proof of Ownership(dated within 30 days).

Please send the completed Fonality LNP form and Proof of Ownership:

via EMAIL: Simply reply to this email with completed Fonality Line Number Porting form(attached) and Proof of Ownership, or send to Lnp@fonality.com. Subject line of email should include your: Server ID/ Sales Order Number.

via FAX: 310-861-4321 (Include “Attn: Server ID/ Sales Order Number”)

NOTE: Line Number Porting process takes 7-30 business days after submission of required documents. Incomplete/Invalid documents will SEVERELY delay the line number porting process.

-
- If three additional days pass (nine days since original request), the LNP group places another call, notifies the Fonality Channel Manager, and sends a third and final notice:
-

Final Notice MISSING DOCUMENTS for your Line Number Porting – LNP for Server 55555

Dear Valued Customer,

This is your Final Notice that we have not received the required documents to process your Line Number Porting request. Please keep in mind that we are unable to proceed to port your numbers until we receive the required documents. **Your request is now stalled until we hear from you or receive the required documents.**

Please send the completed Fonality Line Number Porting(LNP) form and Proof of Ownership(dated within 30 days):

via EMAIL: Simply reply to this email with completed Fonality Line Number Porting form(attached) and Proof of Ownership, or send to Lnp@fonality.com. Subject line of email should include you: Server ID/ Sales Order Number.

via FAX: 310-861-4321 (Include "Attn: Server ID/ Sales Order Number")

NOTE: Line Number Porting process takes 7-30 business days after submission of required documents. Incomplete/Invalid documents will SEVERELY delay the line number porting process

-
- If an additional three days passes with no response, an LNP cancellation notice will be sent as follows:
-

Your request for porting numbers is stalled and will be CANCELED in 10days!!! – LNP for Server 55555

Dear Valued Customer,

Your telephone number transfer (LNP) request is now "Stalled" and will be CANCELLED in 10days if we do not hear from you.

We were unable to move forward with your request due to:

At your earliest convenience please contact us immediately!

-
- Once documents are received, the Fonality LNP group will follow up with the customer or partner to retrieve any omitted information that is required.
 - When it is confirmed that the LNP group has received all of the necessary information to proceed, the following email will be sent as notification that the LNP process has begun:
-

STEP #2 Your Documents have been received and are being processed! – LNP for Server 55555

Dear Valued Customer,

You are now in STEP #2 of 4:

We have received the required documents for your Line Number Porting for numbers:

555-555-5555

FCC regulations require us to furnish your current provider with certain documents on your behalf in order to obtain their authorization and to have them process the porting of your existing numbers. Once the proper documents are submitted and accepted by your carrier, it will take your current provider **7-30 business days to complete the LNP process**. Please be advised that this is not something Fonality can expedite and it is completely dependent on your existing carrier to release your numbers.

Note: Once your carrier confirms the port date, we will notify you accordingly.

Reminder: Please setup your Enhanced 911 [e911] address for each extension using the instructions outlined at the link below. Our Enhanced 911 service provides emergency service operators a physical location for each extension, allowing them to dispatch help to the correct location in the event of an emergency. **You will not be able to place or receive ANY calls without a valid Enhanced 911 location configured!** If you have any questions please feel free to contact our Support Team at (866) 366-2548.

- If the port request is rejected by the incumbent carrier, Fonality’s LNP group will work with that carrier and the customer or partner to take the appropriate actions necessary. In this situation, the following email will be sent:

STEP #2 Your Request has been Resubmitted and are being processed! – LNP for Server 55555

Dear Valued Customer:

Your request has been resubmitted for number (s) xxx-xxx-xxx.

Please be advised that once your request is resubmitted the porting process will restart. You will then be at day 1 of the 7-30 day process.

Once we receive updates from the losing carrier you will be notified immediately.

- When a port date is scheduled, the LNP group will notify the customer or partner and send the following email:

STEP #3 Your Port Date has been confirmed! – LNP for Server 55555

Dear Valued Customer,

You are now in STEP #3 of 4:

Your number (s) ***** are scheduled to port on *****.

Please be advised on the day the number (s) port it is possible to experience up 2 hours down time. Average down time is 5-15 minutes.

If you have additional numbers that are porting, please be advised that you will continue to get these confirmation notices as each number receives a separate port date.

Reminder: Please setup your Enhanced 911 [e911] address for each extension using the instructions outlined at the link below. Our Enhanced 911 service provides emergency service operators a physical location for each extension, allowing them to dispatch help to the correct location in the event of an emergency. **You will not be able to place or receive ANY**

calls without a valid Enhanced 911 location configured! If you have any questions please feel free to contact our Support Team at (866) 366-2548.

http://help.fonality.com/Unbound/E911_Service

- When the number is successfully ported, Fonality's LNP group will contact the customer or partner and provide the following:
-

STEP #4 Your number has been successfully ported! – LNP for Server 55555

Dear Valued Customer,

You are now in STEP #4 of 4:

Your number(s) ***** have been successfully ported to Fonality!!!

You may now cancel these numbers from your previous phone service provider!

Reminder: Please setup your Enhanced 911 [e911] address for each extension using the instructions outlined at the link below. Our Enhanced 911 service provides emergency service operators a physical location for each extension, allowing them to dispatch help to the correct location in the event of an emergency. **You will not be able to place or receive ANY calls without a valid Enhanced 911 location configured!** If you have any questions please feel free to contact our Support Team at (866) 366-2548.

- To check the status of an LNP order, call 877-366-2548, ext. 5990.
- Further information about the LNP process can be found here: [http://help.fonality.com/Connect/Porting_Your_Number\(s\)](http://help.fonality.com/Connect/Porting_Your_Number(s))

2.23 Engage Billing and Collections

- For credit card transactions, the card on file is billed according to the agreed upon schedule (usually monthly). Once paid, a receipt is emailed to the contact on the customer file.
- For net terms, invoices are emailed to the contact on the customer record with Fonality.
- If an invoice is not paid by the due date, a series of three emails are sent to the customer contact urging them to pay as follows:
 - Email One: *Our records indicate the attached invoice is now due. Your prompt payment is appreciated. For your convenience, we accept all major credit cards. For assistance making a payment, or any general billing questions, please contact our Billing department at 877-366-2548 option 1, then option 3. You can also reach us by email at Billing@Fonality.com.*
 - Email Two (sent seven days later): *Our records indicate the attached invoice is past due. Please submit payment today, or contact our Billing Department at 877-366-2548 option 1, then option 3. You can also reach us by email at Billing@Fonality.com. For your convenience, we accept all major credit cards.*

- Email Three (sent an additional seven days later or 15 days post due date): *We have sent several notices regarding the past due status of the attached invoice. To avoid referral to our Collections Department, please submit payment immediately. For your convenience, we accept all major credit cards*
- If still not paid after the email attempts, Fonality will contact the partner on record by phone.
- If the partner is unresponsive, Fonality will begin to call the customer.
- If no response from customer or partner, suspension list is sent to the Fonality sales team.
- The customer account will be suspended within one week if no intervention from sales.
- If the partner is being billed for a customer's system and does not respond to collection attempts, Fonality reserves the right per the partner agreement to contact the end customer directly prior to suspending the service.

2.24 Engage Support

Fonality offers 24X7 phone, email and chat support to assist partners in servicing their customers. The following is the process to engage Fonality support:

Make sure that you have recorded your customer's server ID before contacting support. It is required to create a ticket. If you are calling support for an existing ticket, have the ticket number handy.

- To contact support by phone, call 866-366-2548
 - Select Option 1 for an existing ticket
 - Select Option 2 to create a new ticket
 - Select Option 3 to declare a system down emergency
- To contact support via online chat, visit fonality.com/support
- A ticket can also be created via email by clicking the question mark icon located near the bottom of server control panel after logging in via cp.fonality.com
- All support agents are required to follow up with an email that includes the ticket number and a summary of the issue regardless of the method in which the ticket was created.

2.25 Track Support Tickets

Support tickets can be updated and checked for status in the following ways:

- Call 866-366-2548 and select option 2. You will need your ticket number to progress through the queue.
- Reply to the email that was sent after the initial contact with support.

2.26 Receive commission payments

- Each partner must have a W9 on file with Fonality to be eligible to receive commissions. The W9 is typically collected when the partnership agreement is executed.
- Partners will receive payment by mailed check 30 days from the last day of the month in which the end user paid Fonality. For example, if a customer pays Fonality on December 15, the partner should expect to be paid on or about January 30.
- Any questions or disputes regarding commission payments should be directed by the partner to partnercommissions@fonality.com within 90 days of the order

2.27 Add to Existing Customer Accounts

- Record the customer's server ID
- For legacy products (PBXtra, trixbox Pro, Connect), contact your Channel Manager
- For current platform servers:
 - Log onto the Fonality portal (section 2.9) and enter the server ID into the search field
 - Find customer name and click it.
 - Click "Add to Existing Server"
 - Add items via the quote tool and submit the quote.
 - Contact your assigned Channel Manager to process the order (section 2.2).

2.28 Renew Support Agreements

- Record the customer's server ID
- For legacy products, contact your channel manager
- Create an add on order for support (section 2.29)

3. Important Contact Information

Department / Contact	Email	Phone Number
<u>Channel Managers</u> Chuck Baker, Director	cbaker@fonality.com	469-252-7333
Mike Herter	mherter@fonality.com	310-693-7451
Mike Jasenof	mjasenof@fonality.com	469-252-7408
David Stowell	dstowell@fonality.com	469-252-7480
Shawn Teer	steer@fonality.com	469-252-7350
Sean Wilder	swilder@fonality.com	310-861-4366
Channel Sales Group	resellers@fonality.com	877-366-2548, ext. 6680
Support	Click "?" on Control Panel Chat at fonality.com/support	877-366-2548 Option 1 – Existing Ticket Option 2 – New Ticket Option 3 - Emergency
Installation	installations@fonality.com or use project coordinator's email	877-366-2548, ext. 6215
Local Number Portability (LNP)	lnp@fonality.com	877-366-2548, option 1 then 4
Billing	billing@fonality.com	877-366-2548, option 1 then 3
Commissions	partnercommissions@fonality.com	