

## Let's Get Started!

Welcome to sipgate! This guide will help you with the basic setup of your account. As soon as you are logged in as an administrator you can start to configure sipgate to suit your needs.

We hope that you'll find the setting up of your account easy and fun to do!

### First of all the important stuff that you can only do as an administrator:

- **Contracts:** order, change (upgrade or downgrade) and cancel
- **Phone Numbers:** book and allocate
- **Users:** create, give admin rights, block and delete
- **External Phones:** Integrate to a user's account (e.g. Mobile phones)
- **Groups:** create, give phone numbers and delete
- **Account:** top-up and view your current account balance
- **Invoices:** See your itemized bill

... and of course everything that a user can do!

### Things a normal user can do:

- Use functions e.g. make and receive calls, faxes and SMS. Listen to and configure their voicemails.
- Check and administer their personal inbox.
- Administer their phone number(s) (Which phone number rings where...)
- Configure their phone and personal voicemail and fax.
- Setup caller ID functions
- Setup filters and notifications for their inbox.
- Setup call forwarding features
- Create and edit their contact list

On the next page you will find brief instructions on how to setup your account. Detailed instructions taking you through each function step by step can be found on the pages following.

## Instructions for those in a hurry:

**Note:** When you log into sipgate for the first time, the following will already be setup and ready to use:

A sipgate team edition contract with 200 free minutes

Three free US phone numbers

1. **Book extra phone numbers:** Click Phone Numbers and click on „Buy Phone Numbers“ this will take you to the ordering page, where you can select the type of phone number(s) you wish to purchase. Should you only need the one free phone number you receive as part of your account you can skip over this feature, don't worry though, you can add additional numbers at any time in the future.
2. **Create Users:** Now you've got all the phone numbers you require you need users to give them too! You should create a user for each employee who will use sipgate. In the User tab click „Add User“ to setup new users. During the setup of each user you will have the opportunity to allocate them a phone number and also their extension number. Additionally you can decide whether or not to give the user access to faxes and/or voicemail, and also whether or not they will have admin rights. The new user will be sent an email containing their login details.
3. **Create Groups:** Create groups to organise your employees. Create as many groups as you need and decide which group should be assigned to each employee. Allocate your groups with phone numbers, fax, voicemail and/or an extension number. All members of the group will be reachable on the group's phone/extension number.
4. **Configure your phones:** On each users page you will find the details needed to configure their phone(s) to work with sipgate. How to use this data to configure a user's phone(s) is explained in the "Configuring Sipgate" section of our [Help-Center](#).



The screenshot shows the sipgate Settings interface. At the top left is the sipgate logo and the word "Settings". On the right, there is a dropdown menu for "Office". Below this is a navigation bar with four tabs: "Users & Groups", "Phone Numbers", "Plans & Locations", and "Billing & Invoices". The "Users & Groups" tab is active, showing sub-tabs for "My settings", "Users", "Groups", and "Public". The "Plans & Locations" dropdown menu is open, listing "Overview", "Locations", and "Personalize". The "Billing & Invoices" dropdown menu is also open, listing "Account Statement", "Itemized Call List", "Credit Account", "Invoices", "Redeem Coupon", and "Settings". At the bottom left, there is a search bar with the text "Search:" and an input field.

## And now the detailed setup information:

1. How to book phone numbers.
2. How to create and configure Users.
3. How to create and configure Groups.
4. How to configure your phones.

### 1. How to book phone numbers

How to book extra phone numbers:

- Click on **Settings** and then **Phone Numbers**.
- Next click on “**Buy Phone Number**”.



You have the option to purchase new phone numbers. The phone numbers linked to your account can be allocated to single devices, (Phones, Fax Machines, Groups), to individual employees or to locations. (E.g. conference room or warehouse) Should you allocate a number to a single employee all of their phones will ring simultaneously when the number is called. Purchasing phone numbers can be done at any time giving you the flexibility you need. Purchasing the required amount of phone numbers before creating users or groups is a good idea as it will allow you to allocate phone numbers to users and groups as soon as you create them.

**Important Information:** In order to use local area code phone numbers from your area, your address will need to be verified. In order to verify your details we will need to perform an address verification process. When selecting a specific area code phone number you will receive a Verification form in PDF format. Please note that you can only use local area code phone numbers from your area once your address has been verified. This is also the case should you wish to book further local area code numbers in the future.

**Note:** You are only able to purchase local area code numbers for the area in which you are based.

### Transferring over your previous sipgate account

Should you already have a sipgate account you can transfer over your account information to sipgate team edition, this includes your current account balance and also your existing phone number. In order to do this go to the **Settings** area of your account and click **Plans & Locations** and choose the **Merge Accounts** option.

## 2. How to create and configure Users.

To create an account for a new user follow these instructions:

- Click **Settings**.
- Click the **Users & Groups** tab.
- Click on **Add New User**.



### Step 1

Enter the user's personal details such as name and email address and choose the location that the user is based at.

- Designate whether or not to make the user an administrator.
- Click on the "**next step 2/3**" button


### Step 2

On this page you can decide which phone(s) and number will be linked to the user's account.

**Note:** If you are uncertain what type of phone the user will use you can go back and edit this information at a later time. Additionally on this page you can allocate the user with a previous phone number. This external telephone can be a landline or a mobile phone. The advantage is that when the user's sipgate phone number is called, all phones linked to their account will ring simultaneously, allowing the user to answer the call on whichever phone is at hand. External phones can be added at any time.

### Step 3

On the third and final step the following options are available:

- **Phone Number** – Allocate the user a phone number that is linked to your sipgate account, all phones setup to the user's account will ring simultaneously should this number be called. Additionally you can allocate the user's fax machine a phone number.
- **Extension** – Allocate the user an internal extension number that they can be reachable from by other users on your account, the extension number also works for the user's mobile phone. By clicking on the  symbol you can see which extension numbers have already been allocated.
- **Add to group** – With this option you can choose whether to allocate the user to a previously created group. You can find more information about groups later on in this document.

**Note:** All information can be edited at any time.

### Allocating users a phone number at a later date

You can also allocate users a phone number or additional number at a later date. There are two ways in which you can do this:

#### Option 1:

- In the **Users** section select the user for whom you wish to allocate a phone number to.
- On the user's homepage click the **+ Phone Numbers** button.



- Select a phone number from the drop down box that appears.
- To add additional phone numbers to the user simply repeat this process as many times as necessary.
- The default setting is so that all telephones linked to the user's account will ring simultaneously should their sipgate number be called.
- To select only certain telephones to ring should the user's sipgate number be dialed click on **Edit routing** and select the phones you wish to be linked to this number.
- **Note:** The routing of a user's sipgate number can be configured for one phone or multiple phones. Additionally you can also configure whether or not the user will have permission to edit their routing options

#### Option 2:

- Click on the **Phone Numbers** tab
- In the phone number overview select which phone number you wish to assign to a user(s) and click **click here** where it says "does not ring any phone."
- In the following drop down box you have the option to:
  - Choose a user to allocate the number to (all telephones linked to the user will ring should this number be dialed),
  - Choose a specific phone to link the number to
  - Allocate the phone number to a group

As the Administrator of the account, you decide which phones and phone numbers a user will have access to. The configuration of the user's phones and other personal settings can be done by yourself or the user (if you have given them access to). Instructions on how to setup a user's phone to be compatible with your sipgate account are found later on in this guide.

### 3. How to create and configure Groups

Organize your employees into groups and give them their own fax and answering machines. The whole group can be contacted via the group's designated phone and extension number!

The advantages:

- It doesn't matter where your group members are, they will always be reachable.
- All members of the group are reachable under the chosen phone and extension number.
- All members of the group have access to the group fax and answering machine.


**Note:** The amount of groups that you can create depends on your plan, for example if you are signed up for sipgate 10 you are able to create 10 groups. Should you need more groups (or even users) you can change your [plan](#) at any time.

#### Creating and configuring groups

In order to create a new group please do the following:

- Click **Settings**
- In the **Users & Groups** tab click **Groups** and then **Add Group**.



- Choose a name for the group and allocate the group a phone number and if necessary an extension number.
- **Tip:** Clicking on the  symbol will give you an overview of any extension numbers already allocated.
- Click **next step 2/2**.
- On the next page you can add all users who you wish to be members of the new group.
- You can add and remove members from groups at any time should you wish to do.

#### Assigning phone and extension numbers to groups

Should you have decided to create a group without allocating it a phone or extension number you can do this at a later time by doing the following.

- Click **Settings**
- In the **Users & Groups** tab click **Groups**.
- Select the group for which you wish to assign a phone/extension number.
- On the group's page select **Phone** and click the **+ Phone Number** or **+ Extension** button. A pop up box will appear which will allow you to choose the phone or extension number to assign to the group.

Should you create more users in the future, these can easily be added to existing groups, of course only when the desired group already exists. In order to add additional users to a group please do the following:

- In the **Users & Groups** tab click **Groups** and select the group which you wish to add new members to.
- Click the **+ User** button and select the users you wish to add to the group.

### Setting up group answering machine, fax machine and auto attendants.

You can easily configure groups to suit your needs. Add an answer phone or fax machine, or forward calls on to other connections should the group be unavailable to make answer the call. All these features can be configured and edited at any time.

#### Adding an answering machine

To add an answer phone to a group please do the following:

- In the **Users & Groups** tab click **Groups**.
- Select the group for which you wish to add an answer phone.
- Select Voicemail and click on the **+Voicemail** button.



- The answering machine will be available to use immediately and can be configured at any time.

#### Adding a fax machine

To add a fax machine to a group please do the following:

- In the **Users & Groups** tab click **Groups**.
- Select the group for which you wish to add a fax machine.
- Select Fax and click on the **+Fax** button



- The fax machine will be available to use immediately and can be configured at any time.
- The fax machine will be visible in the group's **Fax** tab.
- In the group's **Fax** tab you can assign a phone number to the fax machine.

## Setting up Auto Attendant

An auto attendant functions as an automated switchboard that will be played to everyone who calls the group's phone number. The auto attendant can be personalized via recording a personal message or by uploading an mp3 file.

To setup an auto attendant for a group please do the following:

- In the **Users & Groups** tab click **Groups**.
- Select the group for which you wish to add an auto attendant.
- Select Phone and click on the **+ Auto Attendant** button.



- The auto attendant will be available to use immediately.
- suit your needs.



## Setting up call forwarding for a group

In order to setup call forwarding for a group please do the following:

- In the **Users & Groups** tab click **Groups**.
- Select the group for which you wish to setup call forwarding.
- Select Phone and click **Voicemail, Call Forwarding & Hunting**.
- On the following page you can configure the group's call forwarding options.

#### 4. How to configure your phones

Setup and configured all your users and groups? Do all your users have a phone number? Great! Now you can get down to configuring your phones! Tip: You'll find lots of articles in our Help-Center relating to the setup of specific VoIP phones and other hardware.

##### The important configuration information

To find the configuration information needed to setup your users' phones please do the following:

- Click Settings
- In the **Users & Groups** tab click **Users**.
- Select the user whose phone you wish to configure.
- On the user's page select the Phone tab, all phones connected to the user will be shown.
- Hover your mouse over the phone you wish to configure and click **SIP Credentials**.
- A pop up box will appear containing all the information needed to configure the user's phone.



##### Setting up the phone

To setup your phone please visit our Help-Center where we have many articles on how to setup specific VoIP phones and other hardware.

Should your (soft)phone not be listed in our Help-Center please try to configure it with the following data.

- Domain/Realm: sipgate.com
- SIP Proxy: sipgate.com
- Outbound Proxy: proxy.sipgate.com
- STUN-Server: stun.sipgate.net
- STUN-Port: 10000
- Register Expire Time: 600 Seconds
- Username: The phone's ID (e.g. 1234567e0)
- Authorization User: The phone's ID (e.g. 1234567e0)
- SIP-Password: The phone's SIP-password