



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 set 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/port over 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 itemised 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 Eventlist
- 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 Eventlist
- Setup call forwarding features
- Create and edit their contact list





From here on you will find a summary of how to setup your account. Detailed instructions taking you through each function step by step can be found on the pages following.

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 60 free minutes (50 to UK landlines + 10 to UK mobiles)

3 free UK non-geographical 056 test phone numbers (only during the trial)

1 free UK local phone number after the trial upon booking a full paid plan

1. **Book extra phone numbers:** As an account administrator, go to Account Administration and click Phone numbers and click on "Book phone numbers" this will take you to the ordering page, where you can select the type of phone number(s) you wish to purchase. You can also port over your existing phone numbers to your sipgate account, be they previous sipgate account phone numbers, or your existing landline numbers. 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 navigation bar (dark blue bar on the left hand side) click "All Users" and then "+ 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-Centre.

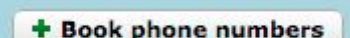


And now the detailed setup information:

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
5. How to configure your Call routing options

1. How to book phone numbers

How to book extra phone numbers:

- Click on **Account Administration** and then **Phone numbers**
- Next click on  **+ Book phone numbers**

You have the option to purchase new phone numbers or to port over existing ones. 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 or porting over 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.

How to port over your existing numbers

In most cases it is possible for you to be able to port over your existing landline phone numbers, be they phone numbers from previous sipgate accounts or even existing landline numbers from many different UK service providers. For more information on porting over your existing phone numbers please visit our [Help-Centre](#).

Transferring over your previous sipgate account

Should you already have a sipgate basic 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 (top right corner), under the section **Switch to sipgate team** click "Switch".

Please note: to carry out this process you will first need to have created and fully verified a sipgate team/trunking account.

2. How to create and configure Users

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

- Click **Account Administration**
- Choose **All Users**
- Click on  + Add 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 if you want to set up a phone/device and a fax for 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.

- Click on the "**next step 3/3**" button



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. By clicking on the  symbol you can see which extension numbers have already been allocated.
- Click  to save

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:

- Choose the user for whom you wish to allocate a phone number to from the drop down menu in the top left corner of the navigation bar (dark blue bar on the left hand side)
- Click **Assign Numbers** in the navigation bar
- Click  and you'll be forwarded to the **Phone numbers** section in the **Account Administration** area
- Follow the steps as described below under **Option 2**

Option 2:

- Go to **Account Administration**
- Click on **Phone numbers**
- In the phone number overview select which phone number you wish to assign to a user(s)
- all numbers on the account not yet allocated are marked **does not ring any phone [click here](#)**
- click [click here](#)
- In the pop up window you have the option to choose where to allocate the number to:
 - a User (all telephones linked to the user will ring should this number be dialled)
 - a Group (all user's phones within the group will ring should this number be dialled)
 - an Announcement
 - a Fax
 - an Unlinked phone (sometimes known as public phones – this being phones which aren't allocated to any users and therefore have limited features)



- an IVR (extra feature booked as part of the Pro-Package)
- a PBX (only with the product “sipgate trunking”)
- a Conference Room (extra feature)

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.

The routing of a user’s sipgate number can be configured for one phone or multiple phones. To select only certain telephones to ring should the user’s sipgate number be dialled go to the User’s **Connections** settings section, explained later in this document (5. How to configure your Call routing options).

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).

3. How to create and configure Groups

Organise your employees into groups and give them their own fax and voicemail. The whole group can be contacted via the group’s designated phone and extension number(s)!

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(s)
- All members of the group have access to the group fax and voicemail

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:

- go to **Account Administration**
- choose **Groups** in the navigation bar
- click **+ 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 by selecting each out of the displayed user list
- Click **Add group** to save

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.

- go to **Account Administration**
- choose **Groups** in the navigation bar
- 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:

- select the group for which you wish to add new members to
- choose the **Members** option from the group configuration menu
- click **+ Members** on the right hand side



- select the user you wish to add from the drop-down menu
- click **Save**

Setting up group voicemail, fax machine and auto attendants

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

Adding a voicemail

- go to **Account Administration**
- choose **Groups** in the navigation bar
- select the group for which you wish to assign a voicemail to
- choose the **Voicemail** option from the group configuration menu
- click **+ Voicemail** on the right hand side
- if desired, change the voicemails description. You can edit it by hovering over the current name

The voicemail announcement on creation is set to the sipgate standard message. If you'd like to change this to a personalised message click [Change](#). If you want to change it to your own greeting, you have the option to either upload an existing MP3-file or record a new one by using our inbuilt **Click2Record** function

- click **Upload MP3** to upload your existing, personalised message
 - click **Choose File** and pick the audio file (max. 2MB) you wish to allocate to this voicemail
 - on a successful upload the audio upload window will show "File transfer completed" and file details
 - click **OK** to save
- choose **Click2Record** to record a personalised greeting via our service
 - decide with which device you want to record the message by selecting an already registered device from the drop down menu (displayed with a green dot)
 - click **START**
 - the selected device will ring





- after picking up, follow the instructions provided
 - end your message by pressing # and press 1 to save
 - you'll be informed that your message has been saved and the call will automatically end
- Click **OK** in the pop up window within your sipgate account. This will save the message and set it as your active announcement

The voicemail will be available to use immediately and can be reconfigured at any time.

Adding a fax machine

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

- go to **Account Administration**
- choose **Groups** in the navigation bar
- select the group for which you wish to assign a fax to
- choose the **Fax** option from the group configuration menu
- click + **Fax** on the right hand side
- click  to assign one of your phone numbers to the group fax
- select the number you wish to add from the drop-down menu
- click 

You can also set your Fax's outgoing Caller ID to either a specific number that's already on your account or use a phone number of your choice by entering that number in the "use this phone number" field. You can also choose to not show any number by selecting "blocked".

The fax machine will be available to use immediately and can be reconfigured at any time.

Setting up an 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 personalised via recording a personal message or by uploading an MP3 file.



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

- go to **Account Administration**
- choose **Groups** in the navigation bar
- select the group for which you wish to assign an auto attendant to
- click **+ Auto Attendant** to assign an auto attendant to the group
- the auto attendant will be available to use immediately



This feature can now be found in the Phone section of your group and allows the caller to connect with a specific user as long as they know that users extension number.

The caller can enter the extension followed by pressing the # key to connect with the extension immediately or hit the # key or wait on the line to be connected to any member of the group.

Setting up call forwarding for a group

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

- go to **Account Administration**
- choose **Groups** in the navigation bar
- select the group for which you wish to setup call forwarding
- choose the **Phone** option from the group configuration menu
- click **Voicemail, Call Forwarding & Hunting**
- on the following page you can configure the group's call forwarding options



4. How to configure your phones/devices

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/devices! Tip: You'll find lots of articles in our Help-Centre 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/devices please do the following:

- choose the user for which you wish to setup/configure a phone/device from the drop down menu in the top left corner of the navigation bar
- click **Phones** in the navigation bar, all phones/devices connected to the user will be shown in the Phones column
- in the next column you will find your **SIP Details** section (you might need to scroll down to the bottom of the page)
- your SIP Details are your **SIP-ID** and your **SIP Password**

Setting up the phone/device

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

Should your phone/device's exact model not be listed in our Help-Centre, please look if there's a similar model available, if so the information provided should help with the configuration of your model. Otherwise try to configure it with the following data:

- Domain/Realm: sipgate.co.uk
- SIP Proxy: sipgate.co.uk
- Outbound Proxy: sipgate.co.uk
- STUN-Server: stun.sipgate.net
- STUN-Port: 10000
- Register Expire Time: 600 seconds
- Username: The device's ID (e.g. 1234567e0)
- Authorisation User: The device's ID (e.g. 1234567e0)
- SIP-Password: The device's SIP Password



5. How to configure your Call routing options

In order to setup your call routing, please do the following:

- choose the user for which you wish to setup a call routing from the drop down menu in the top left corner of the navigation bar
- click **Connections** in the navigation bar
- if during user setup you added a device to the user, then you'll see a phone in the "Turn VoIP Phone on/off" section and you'll also see a connection against the users name in the Phone Lines column
- if no phone number was assigned during the user's setup, assign a phone number now. Do this by following the instructions on page 5 (Option 1 or 2)
- by default (as long as a device was previously allocated) the phone/device should be showing as "ON" in the "Turn VoIP Phone on/off" section
- this basically means that any calls made to the number allocated to the user showing in the connection in the Phone Lines column will ring through to that device
- if the user has multiple devices entered in their profile (**Phones** setting in the navigation bar), then all of the devices would show up in the "Turn VoIP Phone on/off" section
- by toggling the ON/OFF slider you can decide which phone(s) the incoming call will route to for the chosen phone line
- if the user has multiple phone lines (more than one entry in the Phone Lines column) then, it is possible to edit that connection's routing by clicking on the entry and then using the ON/OFF slider as explained above

