



The Ultimate Starter's Guide to SimpleVoIP: Everything You Need to Know



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Getting Started

Hey there, and welcome to SimpleVoIP! We're thrilled to have you on board and look forward to helping you make the most of our services. This guide is designed to provide you with all the information you need to get started with SimpleVoIP as an SMB.

Onboarding Process

The onboarding process for SMBs is simple:

- Complete the Full-Service Onboarding Document: we will email you a [Full-Service Onboarding document](#). This document gathers essential information about your company and specific phone system setup requirements. Please take the time to provide accurate and detailed information in the document. This will help us tailor the system to your unique needs and preferences.
- Custom Phone System Development and Handover: After receiving your completed Full Service Onboarding document, our team of experts will start designing and building a custom phone system based on your provided information.

Once the system is built and tested, we will notify you that it's ready for deployment. At this stage, we will hand over the system to you. We will provide you with all the necessary access credentials, user guides, and training materials to ensure a smooth and successful transition.

Following these two simple steps, SMBs can quickly and efficiently onboard to our custom phone system services, ensuring a seamless experience catering to their specific needs and preferences.

Porting Process Overview

The Porting Process at SimpleVoIP is designed to be smooth and hassle-free, allowing you to transfer your existing phone numbers to our platform without any disruption. Here's a detailed explanation of the process:

- Provide a Phone Bill: To begin the porting process, you must submit a recent phone bill that clearly displays the phone numbers you wish to transfer to SimpleVoIP. This bill serves as proof of ownership and helps us gather important details such as account numbers, service addresses, and authorized contacts necessary for a successful porting process.

- **SimpleVoIP Handles the Heavy Lifting:** Once we have your phone bill, our experienced team at SimpleVoIP will handle all the technical aspects and coordination efforts required for the porting process. We will communicate directly with your current carrier to initiate the transfer and ensure that all necessary information is provided.
- **Seamless Transfer with No Downtime:** Our primary goal during the porting process is to ensure that there is no downtime or disruption to your phone service. We'll work closely with your current carrier to schedule the transfer conveniently, ensuring the switchover is seamless and that your phone numbers remain fully operational throughout the process.
- **Confirmation and Completion:** Once the porting process is complete, we will notify you, confirming that your phone numbers have been successfully transferred to SimpleVoIP. You can now enjoy all the features and benefits of our platform, including cost savings, increased functionality, and superior customer support.

Accessing Support

At SimpleVoIP, our dedicated support team is always on standby to help you with any questions, concerns, or issues you may encounter while using our services. Our support site, support.simplevoip.com, contains helpful resources, guides, and troubleshooting information to help you get started. You can also access these resources directly through the [Q Branch portal](#) by selecting Knowledge Base to view support articles or Support Tickets to submit and manage support requests.

1. **Email Support:** If you have any questions or concerns, contact our support team by emailing support@simplevoip.com or send it directly through Support Tickets through the [Q Branch portal](#). Our team will carefully review your message and respond with the necessary guidance or solutions.

2. **Phone Support:** If you prefer to speak directly with a support representative, call us at [855-899-8647](tel:855-899-8647). Our knowledgeable and friendly team members will happily address your concerns, answer your questions, or guide you through any troubleshooting steps.

Account Management

Managing your SimpleVoIP services is easier than ever with [Q Branch](#), our centralized customer portal designed to give you quick access to the tools, resources, and applications you use every day.

Accessing Q Branch

To access your SimpleVoIP services, log in to [Q Branch](#) using your existing SimpleVoIP credentials. If you've previously logged into any SimpleVoIP portal, your existing username and password will work in Q Branch. First-time users can select Forgot Password to create a password, and Microsoft and Google Single Sign-On (SSO) options are also available.

Once logged in, Q Branch serves as your central hub for accessing SimpleVoIP applications and resources, including account management tools, support resources, and any SimpleVoIP products your organization is authorized to use.

Account Management & Billing

Q Branch provides access to account-related resources, including billing and payment management tools. From the portal, you can access the billing portal to view invoices, make payments, and manage account information.

Ordering New Services or Equipment

If you'd like to add services, purchase equipment, or discuss solutions for your business, our team is here to help. Contact SimpleVoIP Support or your account representative to discuss available options and ensure a smooth implementation.

Changes to Existing Services

If you need to make changes to your services, including upgrades, downgrades, or cancellations, please contact our support team. We'll review your request and help ensure any changes are completed smoothly and efficiently.

Customizing Your Phone System

At SimpleVoIP, we understand the importance of a flexible and adaptable phone system that meets your unique business needs. Our complete setup and customization process ensures that your phone system is tailored to your requirements and remains adaptable as your needs evolve.

- Initial Setup: Our white-glove service takes care of the initial setup of your phone system based on the information you provide in the Full Service Onboarding document. Once we've completed the setup and thoroughly tested the system, we'll send you the necessary access credentials and support articles for a seamless operation.
- Customizing Your Phone System: After the initial setup, you can further personalize and fine-tune your phone system by logging into the SmartPBX portal within Q Branch.

Log into SmartPBX

To log in, visit [Q Branch](#) and enter your credentials. There you'll see the SmartPBX tile which can be provisioned or is already provisioned on your account. If not, please request it from your dedicated customer success manager.

The screenshot shows the SmartPBX dashboard for an 'Example Customer'. The interface includes a navigation sidebar on the left with options like Numbers, Users, Groups, Main Number, Call Logs, Devices, Voicemail Boxes, and Feature Codes. The main content area displays several key metrics and charts:

- Total Users:** 5 (represented by 5 person icons)
- Total Devices:** 5 (represented by a donut chart showing 5 SIP Phones)
- Unregistered Devices:** 5
- Conference Bridges:** 0
- Main Number:** +1 555 321 9876
- Conference Number:** +1 555 321 9876
- Faxbox Number:** (empty field)
- Total Numbers:** 2 (represented by a donut chart showing 1 Assigned Number and 1 Spare Number)
- US DID:** 2 (represented by a donut chart)
- Company Directory Users:** 0 (with a Download button)
- Account ID:** 7e469efcdd409587c31d4816d3e047b5
- Account Realm:** geckoventures.00001.s.simplevoip.us

Renaming Users and Devices

To manage users and devices or update their information, log into the SmartPBX portal and navigate to the Users or Devices section. Here, you can add or remove users and devices, assign extensions, and update user profiles and device names as needed.



Support Article



How-to Video

Customizing Your Voicemail

Each user on the SimpleVoIP system has access to their voicemail. You can customize greetings, check messages, and manage voicemail settings through the SmartPBX portal or by dialing your voicemail from your SimpleVoIP phone.



Support Article



How-to Video

E-Fax

Send and receive faxes electronically with SimpleVoIP's eFax service. Access your eFax account through the SmartPBX portal and manage your faxes from anywhere without needing a physical fax machine.



Support Article



How-to Video

Find Me/Follow Me

The Find Me/Follow Me feature allows you to set up call forwarding, ensuring you never miss an important call. You can route incoming calls to multiple devices, including your cell phone, so you're always reachable.



Support Article



How-to Video

Hot Desking

Hot desking enables users to log into any phone within your organization and access their personal phone settings. This feature is perfect for shared workspaces or employees who frequently move between locations.



Support Article



How-to Video

Caller ID

Customize your caller ID settings to display your preferred name and number when making outgoing calls. You can also enable caller ID blocking for specific calls or set up anonymous call rejection.



Hold Music

Personalize your caller experience by selecting custom hold music for your phone system. Choose from our library of licensed music or upload your own audio files.



Auto-Attendant

The auto attendant is a virtual receptionist that greets and routes incoming calls to the appropriate extensions, departments, or voicemail boxes based on your custom menu options.



Main Number Call Routing

Your main number will be pre-loaded in the SmartPBX portal, but you can add more numbers if needed. Here you'll learn how to route calls to specific users or departments based on the caller's selection.



Order Management in SmartPBX

Manage all your orders, including new services, replacement phones, and upgrades, through the SmartPBX portal. Navigate to the Order Management tab to view and track your orders' progress, submit new orders, and manage existing orders.

Billing Process

Our website offers a wealth of helpful troubleshooting guides and network optimization resources. For instance, check out our [VoIP Readiness guide](#), a comprehensive article detailing the cabling and network configuration requirements for a successful VoIP implementation.

You will receive monthly invoices via email, and payments can be made conveniently through our portal using ACH or credit card (please note that we do not accept checks).

We encourage you to take a moment to create your account in our online billing portal by clicking Billing Portal in [Q Branch](#).

Here's a helpful guide on activating your online billing account:

<https://support.simplevoip.com/hc/en-us/articles/360046561414-Customer-Billing-Portal>

To sign up for an account, you'll need your Account Number and Registration Code, which can be requested from billing@simplevoip.com.

Our billing portal offers you the ability to:

- View and download all your invoices
- Generate call detail reports
- Pay your bills using ACH or credit card
- Set up automatic payments for future bills
- Update your email address for new bill notifications.



RESOURCES

SimpleVoIP Website

simplevoip.com

SimpleVoIP Support Website

support.simplevoip.com

User Portal

user.simplevoip.us

Learning Videos

www.youtube.com/@TheSimpleVoIPChannel

Customer Support Line

855-899-8647

Customer Support Email

support@simplevoip.com

