Add Organization

This page contains instructions on how to add and customize an Organization account.

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Overview

If you want to go through the process of creating an organization account much faster, you may use templates. There are two types of **Organization templates** and only service providers and admins may add them to the system:

- **Legacy templates** allow you to automatically add a new organization of users to the VoipNow system. The organization and its users will only have access to VoipNow's capabilities.
- **Subscription templates** allow you to automatically add a Hubgets organization to the VoipNow system. Based on the purchased Hubgets subscription, the organization and its users will be automatically created with specific limits and permissions, and charged based on the charging plan assigned to the subscription.

The use of templates is not mandatory, but it's recommended if you want to save time and effort. More information below.

Add organization

To add a new organization account:

1. Click the Add Organization icon available in the **Tools** area.
2. Fill in the Organization form, paying close attention the required fields:

   - **Create using templates:** Use one of **organization templates** available to save time. A template contains predefined settings to create the organization. Here you have 3 options:

     a. **You may create an organization without a template**. For this, you need to select '--'. This implies that no charging plan is inherited, so you will have to **add one by yourself**. To be able to associate a charging plan with the newly created account, you need to make sure **charging is enabled** from the **Unified Communications Settings Zero Priority Charging** preferences page. Although associating a charging plan with the newly created account is not mandatory. However, you should know that, in the absence of a charging plan, the organization's extensions will not be able to place any calls.

     b. **You may select a legacy template** from the drop-down list. If the legacy template you've selected already has a charging plan, you will see it enabled in the **Charging plan** field below. You can replace it with another charging plan from the drop-down list. Or, if you want to create your organization without a charging plan, you can deselect it. But you should know that, without a charging plan, the users in the organization will not be able to place any calls. The members of an organization created with a legacy template cannot access the Hubgets interface/service.

     c. **You may select a subscription template** from the drop-down list. The subscription templates are useful for adding a Hubgets organization to the VoipNow system. If you choose a subscription template, your organization will automatically inherit the subscription's charging plan. You will see it selected by default in the **Charging plan** field below. This **Charging plan** field is also locked for editing as you cannot replace it with another plan. The drop-down list may show some grayed out subscription templates. This means you will not be able to use them because they have greater permissions and limits than those allowed by your account.

   - **Company name**: Enter the name of the company for which you want to create the organization account.
   - **First name:** Enter the first name of the contact person for this organization account.
   - **Last name:** Enter the first name of the contact person for this organization account
   - **Username:** Please refer to the **Appendix** to see the characters allowed for usernames.
   - **Password auto generation:** This password is generated automatically.
   - **Password:** A valid password must have at least 8 characters. Please refer to the **Appendix** to see the characters allowed for passwords.
   - **Email:** Enter an e-mail address associated with this organization account. Please note that the email address can contain characters from any official language script. Domain names that contain these special, so called non-ASCII, characters are called Internationalized Domain Names (IDNs). VoipNow supports **IDNs**.
   - **Country:** The country selected by default is listed in the **Customize the Interface** page.
   - **Region:** The regions are listed in alphabetical order. The one selected by default is the first one in the list.
   - **Timezone:** The time zone selected by default is the one you have previously set up in the **Unified Communications Web Interface** page, i.e. in the **Default timezone** field.
   - **Interface language:** Choose a language for the interface. If you choose the Default option, the language that will be used for the organization account interface is the one specified by the administrator in the **Customize the Interface** page.
   - **Notes:** Enter additional information about this account.
3. Customize charging and outgoing call filtering.
   - **Charging plan:** Choose one of the available charging plans that will apply to the new organization account. To create an organization account with a charging plan, make sure the option is enabled from the **Unified Communications Settings Zero Priority Charging** section and follow the steps described here. Please note that if you chose to create your organization based on a subscription template, the **Charging plan** field will be disabled. This means that your organization and all its users will automatically be charged based on the charging plan assigned to the subscription template you're using.
   - **Outgoing routing group:** Choose one of the outgoing routing rule groups previously defined by the service provider for its organizations. The purpose of this group rule is to restrict the outgoing calls placed by users on the new organization account.
   - **Charging identifier:** The information entered in this field may be used by other applications which connect to VoipNow for charging. This option is available only to the administrator, who can set up this feature for all account levels. The organization and user level accounts inherit this option from the parent account.

4. To configure permissions and limits, select the **Choose roles and phone numbers** checkbox and click **OK**. To return to the previous page without submitting these changes, click **Cancel**.

Edit organization

To edit an organization account, select the Organization from the **Organizations Management** page and click **Edit Organization** under **Account**. The above-mentioned form will be displayed and you can redefine settings as you see fit.

How to change the subscription for your Organization

To change the subscription plan of your Organization, open the **Subscription** drop-down list and, from the templates available, select the subscription plan you want to assign to your Organization. Subscriptions with greater permissions than what those allowed for your account are grayed out. Therefore, you cannot use them.

Once you've changed the subscription, the permissions and limits of your organization and all its users will be updated accordingly. The usage will be charged based on the charging plan assigned to the new subscription. Also, as soon as the subscription of the organization has been successfully updated, the Service Provider and the Admin(s) will receive an email notification.

To customize the template for the email notification on subscription updates, check the **Organization Email Templates** page.

Then follow the same steps as above.

Related topics
Set up organization roles

Manage operations on an organization account

Manage interface options for an organization account